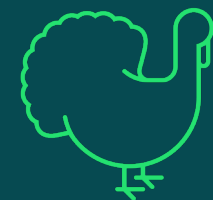




2021 Canadian Thanksgiving Recap

Numerator Insights • Promotions Intel



WHAT HAPPENED?

HERE'S WHAT CONSUMERS *SAID* ABOUT THANKSGIVING

84% of Canadian consumers expected COVID-19 limitations to impact their Thanksgiving celebration plans this fall, although **60%** expected the impact to be slight.

- 18% expected to spend less than in previous years.
- 20% expected to spend more than in previous years.

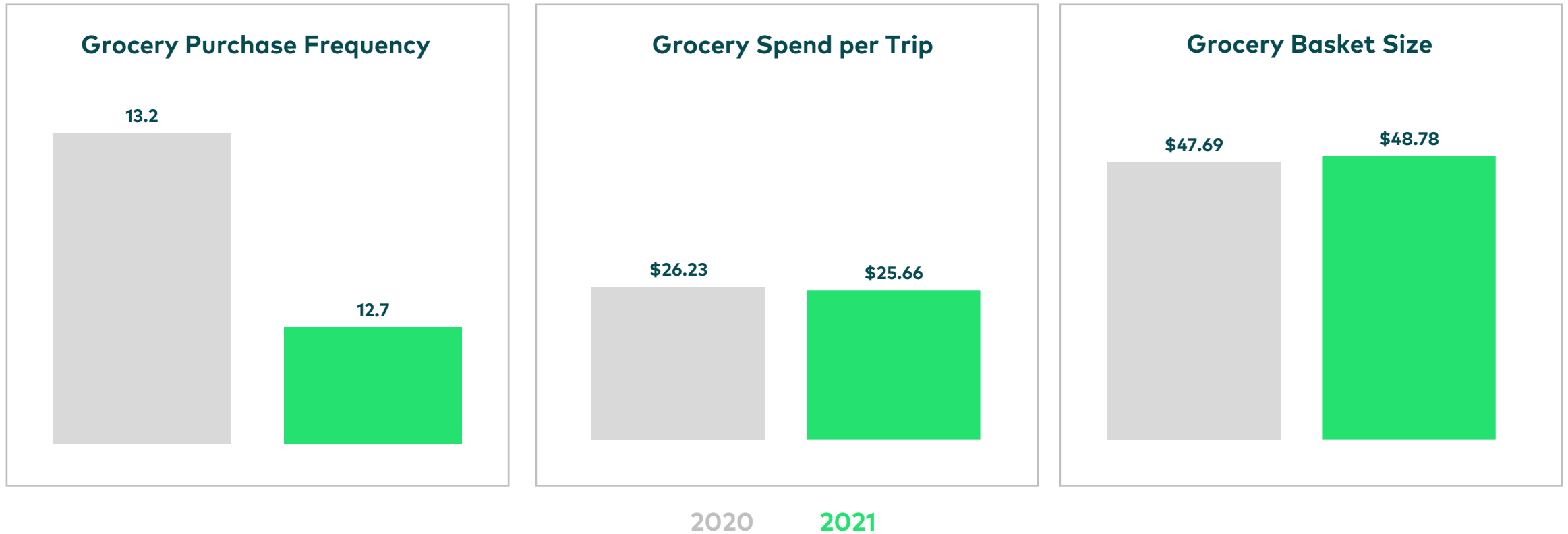
THIS IS WHAT CANADIAN CONSUMERS *ACTUALLY DID*

More Canadians appear to have gathered with others this Thanksgiving, leading to:

- Fewer households purchasing groceries. Purchase frequency declined by **3.8%**. HH penetration for most categories declined.
- Hosts spending more overall on groceries. Basket size increased by **2.9%**.

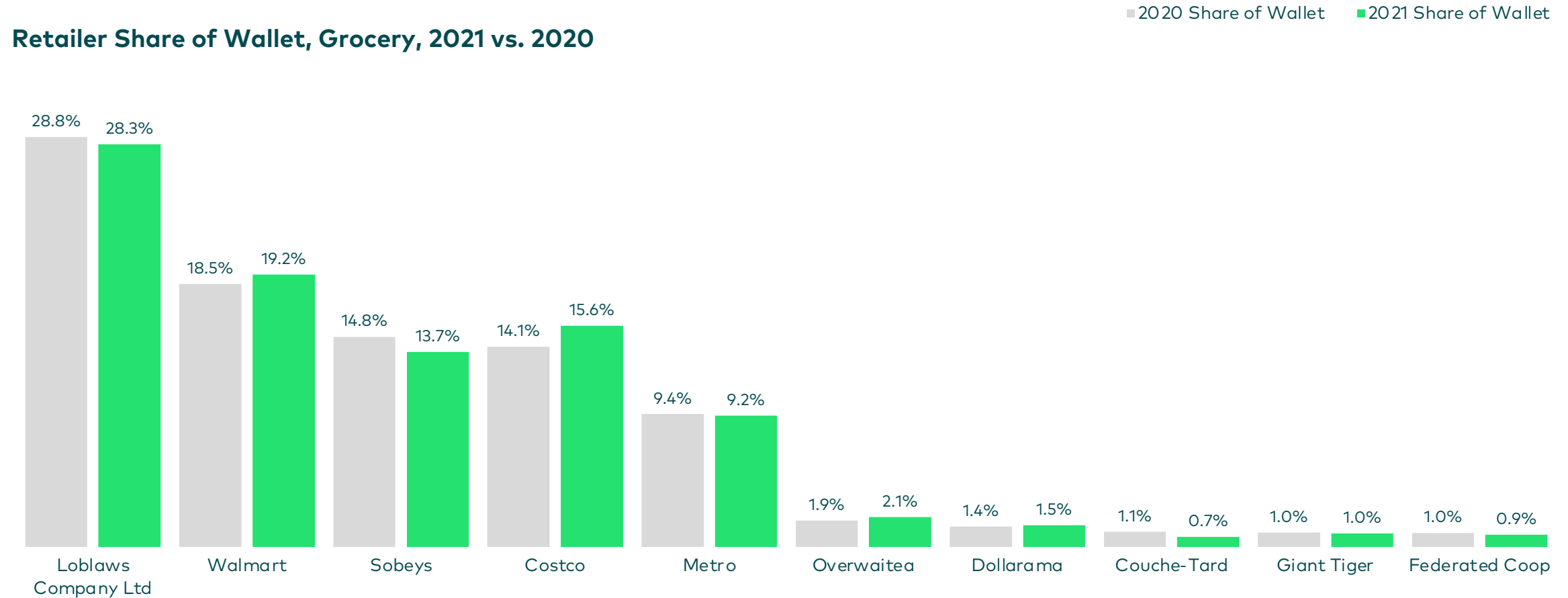
Projected Thanksgiving grocery sales declined by 6%

Compared to YAG, buy rate and spend per trip declined, while basket size increased, suggesting that Canadians gathered in larger groups and spent less on Thanksgiving overall.



Costco won Thanksgiving 2021

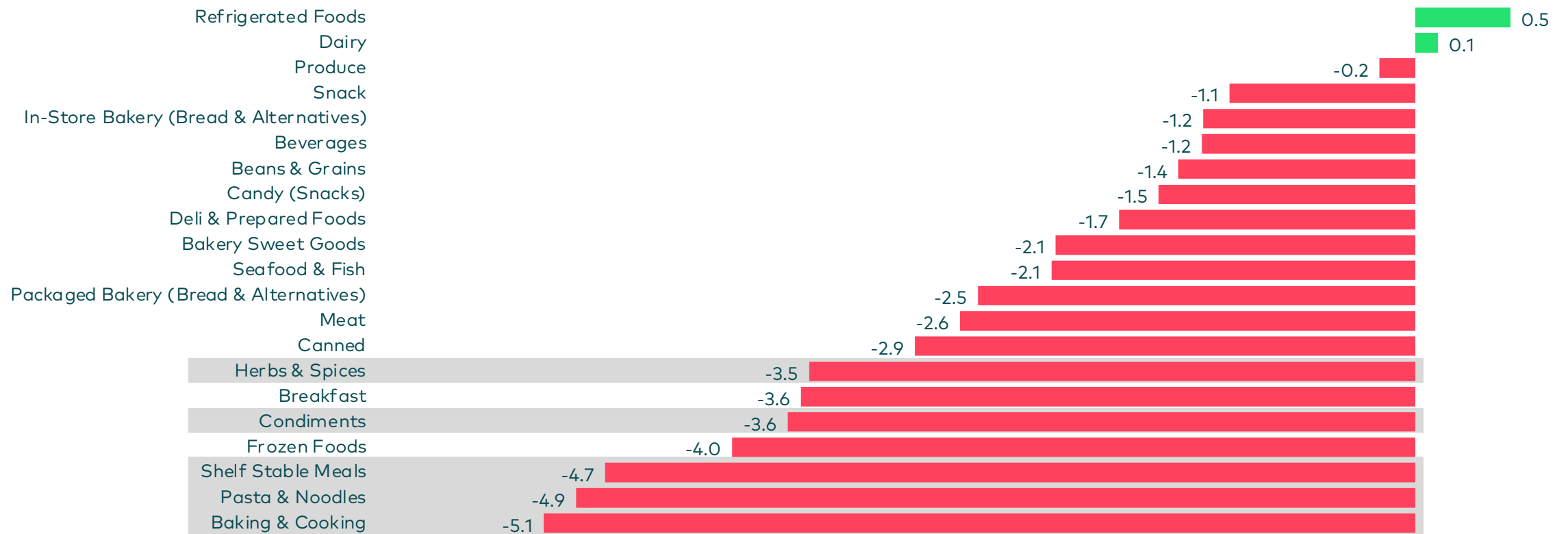
Compared to Thanksgiving 2020, Costco's Share of Wallet for the Grocery department increased by **1.5** percentage points. Walmart, which captures more SOW overall, saw its share increase by **0.7** points.



Household penetration was down for Thanksgiving categories

The most common Thanksgiving categories (indicated below) show HH penetration decreases by about **4 points**.

Change in HH Penetration, Percentage Points, 2021 vs. 2020



Fewer Canadians purchased turkey, another indicator of normality

As Canadian consumers gathered with more friends and family, HH penetration **declined** for the turkey category, while buy rate and spend per trip **increased**.

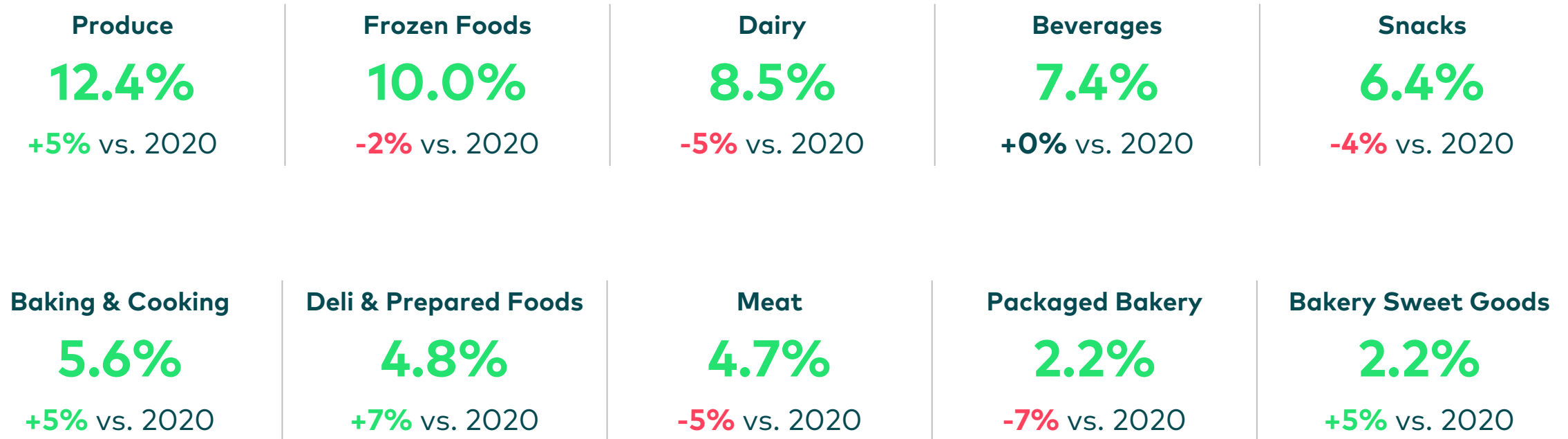
Change in Category Metrics, 2021 vs. 2020

	All Turkey	Fresh Turkey	Frozen Turkey
Household Penetration	-3.0 pts	-2.3 pts	-0.8 pts
Buy Rate	12.3%	2.6%	21.9%
Spend per Trip	11.1%	3.1%	20.3%
Basket Size	-0.8%	-9.8%	13.2%
Projected Sales	-3.1%	-17.2%	12.7%

Retailers promoted Produce and Baking & Cooking more in 2021

Dairy, Pasta & Noodles, and Snacks were all less likely to be promoted in 2021 compared to 2020.

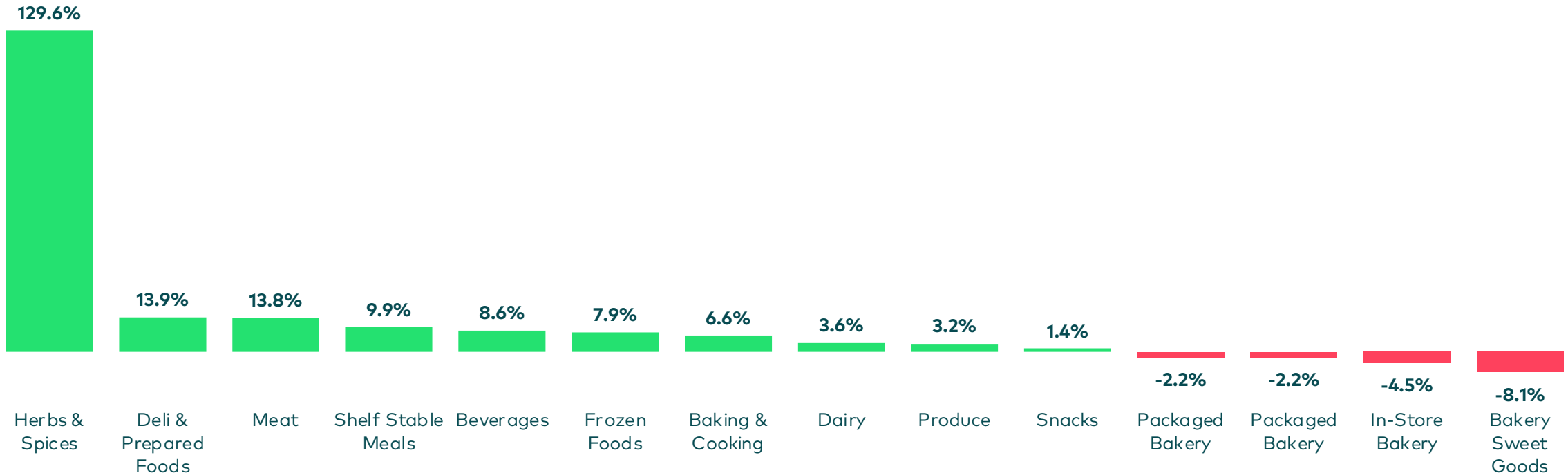
Top Grocery Categories by Share of Promotional Voice



Most Thanksgiving categories were promoted at a higher price in 2021 vs. 2020

On average, Grocery categories saw a **promoted price increase of 11%**.

Percent Change in Average Promoted Price, 2021 vs. 2020



There's more to know.

Reach out for custom insights.

Canadian consumer behaviour continues to evolve. Leverage Canada's largest, most representative consumer panel to get the insights you need to drive growth.

Questions we can help answer:

- Where did shoppers purchase my brand and category this year? How did their behaviour shift compared to 2020, and how do they plan to behave in the future?
- Did the new shoppers gained during COVID purchase my brand this Thanksgiving? If not, why?
- Did my brand or category shoppers leak from key retail partners to competitive retailers? How can I partner with retailers to win those shoppers back?
- How did my competitors' promotional strategies shift this Thanksgiving? Did those shifts impact shopper behaviour?

Learn More.

hello@numerator.com





Know More. Grow More.

For custom insights on your brand or category, reach out today!



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