

#### **METHODOLOGY**

**Effective Ad Count Used in Study:** Effective Ad Count gives partial credit to any product that shares an ad block with other products in order to provide more context in promotional analysis. For example: If 4 products are present in an ad block each will only receive a .25 count for that particular promotion. If 3 products are present each one receives .33 count.

Time Periods: Current Year: 2/16/2014 - 3/22/2014

Prior Year: 2/17/2013 - 3/23/2013

**Retailers Used in Representative Market Review:** A & P, Albertson's - SoCal (SVU), Albertsons SOC, CVS, Dollar General, Family Dollar, Food Lion, Giant Eagle, Giant Food Landover, H.E.B., Jewel-Osco (NAI), Jewel-Osco (SVU), Kmart, Kroger CIN, Meijer, Rite Aid, Safeway Stores, Stater Bros, Super 1 Foods, Target Stores, Walgreens, Walmart-US, Winn Dixie. Representative Markets Used.

**Retailers Used in Promoted Price Study:** Chicago Market Retailers: CVS, Dominick's Finer Foods, Food 4 Less, Meijer, Strack & Van Til, Target Stores, Ultra Foods.

Media Type: Circular Promotions.

**Sampling Methodology:** A typical basket of St. Patrick's Day items was developed using the following categories: Beef, Cheese, Cheese Chunk/Block, Cordial, Deli Beef/Roast Beef, Deli Cheese, Dry Potatoes, Fingerling Potatoes, Fresh Cut Flowers, Grated Cheese, Imported Beer, Irish Whiskey, Other Vegetables, Petite Potatoes, Potato Chips, Red Potatoes, Russet Potatoes, Specialty Cheeses, White Potatoes, Yellow Potatoes and Bakery In-Store. The basket was used to identify pages containing St. Patrick's Day theme promotions.

**Retailers Used in America's Most Irish Metro Market Review:** Price Chopper (Golub), ShopRite and Walmart in Albany, NY market; Acme (NAI), ShopRite and Safeway Stores in Wilmington, DE market; Demoula's Market Basket, Donelan's Supermarkets, and Shaw's Supermarkets (NAI) in Boston, MA market.

**America's Most Irish Metros:** America's Most Irish Towns Forbes. Retrieved on 3/6/2015 from http://www.forbes.com/sites/trulia/2013/03/15/americas-most-irish-towns/



### REPRESENTATIVE MARKET REVIEW - SELECTED RETAILERS

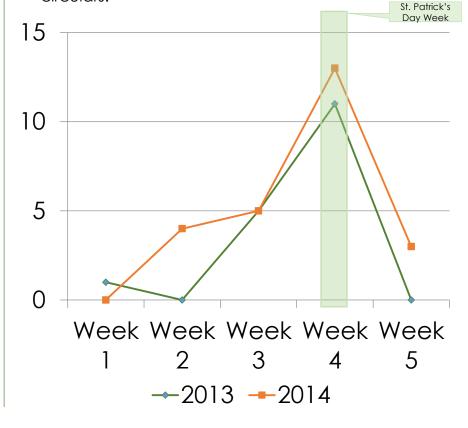


## BEEF AND FLOWER PROMOTIONS MAY INCREASE AS RETAILERS PUSH SOME ST. PATRICK'S DAY PROMO THEMES EARLIER

Look for Beef and Fresh Cut Flowers effective promotions to increase on St Patrick's Day promo pages in 2015 season. Fresh Cut Flowers promotions increased over 6X on these pages in 2014. As retailers attempt to entice shoppers to pick up more store prepared goods, Bakery In-Store promotions can be expected to have a larger presence this season.

Promoted Categories	2013	2014
Beef	32.3%	37.8%
Cakes	4.6%	8.6%
Breads	10.0%	8.1%
Fresh Cut Flowers	1.5%	6.4%
Other Vegetables	7.3%	5.7%
Imported Beer	8.8%	4.7%
Potatoes	6.5%	3.8%
Deli Cookies	3.1%	3.8%
Specialty Cheeses	0.8%	3.3%
Pies	0.8%	3.3%

St. Patrick's Day theme promotional pages appear in circulars typically one week after Valentine's Day. Look for more early theme pages this season especially two weeks prior to the holiday. While most promotions will continue to appear in the week prior to the holiday, holiday theme promotional "creep" can be expected. In 2014 this promotional creep was noticed in week 2 (Week Ending 3/1/2014) circulars.





## MORE VARIATION IN OFFER TACTICS FOR IN-STORE BAKERY AND MORE ST. PATRICK'S DAY THEMED WRAP PAGES TO BE USED

Retailers can be expected to used more varied promotional tactics to drive Bakery In-Store promotions. Competition for shoppers' bakery spend and the cold 2015 temperatures may bring further promotional variation this season. Retailers may capitalize on the cold weather by offering more BOGO offers, thus pushing more quantity. Offer tactics used for St. Patrick's Day items have been mainly Price Only Y/Y. However, x/For tactic promotions for Bakery In-Store categories (Breads, Cakes and Deli Cookies) increased in 2014.

	Price	Only	x/l	or	Save \$	X/X%	Otl	her	ВО	GO
Category	2014	2013	2014	2013	2014	2013	2014	2013	2014	2013
Beef	90.3%	85.7%	2.5%	2.4%	4.6%	7.1%	2.5%	4.8%	0.0%	0.0%
Cakes	72.2%	100.0%	22.2%	0.0%	5.6%	0.0%	0.0%	0.0%	0.0%	0.0%
Breads	58.8%	100.0%	41.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Fresh Cut Flowers	92.6%	50.0%	0.0%	0.0%	0.0%	0.0%	7.4%	0.0%	0.0%	50.0%
Other Vegetables	100.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Imported Beer	100.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Potatoes	62.5%	76.5%	25.0%	0.0%	0.0%	0.0%	0.0%	11.8%	12.5%	11.8%
Deli Cookies	87.5%	100.0%	12.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Specialty Cheeses	100.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Pies	100.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

More St. Patrick's Day themed Wrap pages may be seen this season as an increase in Wrap page promotions was seen year over year. Albertson's SOC and Jewel-Osco (NAI) shifted Back page theme promotions to Wrap pages last season. These particular 2014 Wrap pages featured Corned Beef, Guinness Beer, Irish Soda Bread, Potatoes and Cabbage.

Circular Page	2014	2013
Front	20.0%	29.4%
Middle	56.0%	29.4%
Wrap	24.0%	17.6%
Back	0.0%	23.5%



## DELI CORNED BEEF PROMOTED PRICE PER POUND MAY BE HIGHER BUT IMPORTED BEER PROMOTED PRICES MAY BE LOWER IN 2015

A review of Chicago retailers promoting Corned Beef products found that Deli Corned Beef promoted prices were higher across the retailers shown. Meijer promoted the same Meijer Deli Corned Beef product for an additional \$2 in 2014 and Strack & Van Til edged up Deli Corned Beef by \$1 in 2014. Food 4 Less promoted a branded Deli Corned Beef in 2014 versus a P/L product seen in 2013. Corned Beef Brisket products may see little change in 2015 promoted price as little increase was seen for this product in Chicago market Y/Y.

	Corne	Corned Beef		ned Beef
Chicago Retailers	2014	2013	2014	2013
Dominick's Finer Foods		\$1.99		
Ultra Foods	\$1.88	\$1.88	\$4.88	\$4.88
Food 4 Less	\$1.99	\$1.48	\$5.99	\$4.88
Strack & Van Til	\$1.99	\$1.99	\$5.99	\$4.99
Meijer	\$2.47	\$2.47	\$8.99	\$6.99
Target Stores	\$2.99			

Minimum promoted prices for 11-12 oz. 12 ct./pk. Irish beer brands were lower in 2014 at many Chicago retailers. The increase in popularity of niche and craft beer brands; and more overall St. Patrick's Day promotional competition may be driving these promoted price reductions.

	Guinne	ess Beer	Harp Lager		Smithwick's Beers	
Chicago Retailers	2014	2013	2014	2013	2014	2013
cvs	\$13.99	\$12.99		\$12.99		
Dominick's Finer Foods		\$10.97				\$10.97
Food 4 Less	\$12.99	\$10.98				
Meijer	\$9.99	\$11.99				
Strack & Van Til	\$11.88	\$12.99	\$12.88	\$12.99	\$11.88	\$12.99
Ultra Foods	\$10.38	\$12.99	\$11.88	\$12.99	\$10.38	\$12.99



# AMERICAN MOST IRISH METRO MARKETS REVIEW – SELECTED RETAILERS



## **ALBANY NY MARKET** – REGIONAL SUPERMARKETS PROMOTED MORE TRADITIONAL MEALS ON THEMED PAGES IN 2014

Albany, NY is considered one of America's Most Irish Metros\*. Regional retailers like Price Chopper promoted more St Patrick's Day meal options than Walmart in this market. Did Walmart miss an opportunity to connect with a large portion of the metro population? Holidays such as this are great opportunities for regionalized promotional variation. 2014 Promotional share for St. Patrick's Day items promoted on themed pages is shown below.

Price C	hopper	Shopl	Rite	Wali	mart
Beef	28.1%	Beef	18.1%	Breads	33.3%
Breads	16.0%	Breads	16.8%	Deli Cookies	16.7%
Cakes	14.0%	Deli Cheese	10.3%	Muffins	16.7%
Deli Cheese	6.1%	Specialty Cheeses	7.7%	Cakes	16.7%
Specialty Cheeses	6.0%	Fresh Cut Flowers	7.7%	Cheese	16.7%
Deli Cookies	6.0%	Cakes	6.5%		
Deli Beef/Roast Beef	5.1%	Morning Goods	6.5%		
Imported Beer	4.7%	Other Vegetables	5.2%	708	
Other Vegetables	4.0%	Deli Beef/Roast Beef	4.5%	each pack  St. Patricks Day Cookles 10 Prock Assilates on our Eulery	\$ 6 sels particles to Day Cuprales 12 Pet.
Morning Goods	4.0%	Desserts	3.87%	NA/ pulsas punk I	IC Alla august

Walmart-US – Albany, NY – 3/2/2014 Circular Middle (3)



Price Chopper (Golub) – Albany, NY – 3/16/2014 Circular Middle (11)



\*America's Most Irish Towns. http://www.forbes.com/sites/trulia/2013/03/15/americas-most-irish-towns/

## WILIMINGTON DE MARKET – SHOPRITE PROMOTED 2014 ST PATRICK'S DAY USING MORE THEMED PAGES

Safeway

Beef

**Breads** 

Cakes

Fresh Cut

**Vegetables** 

Flowers Other 36.4%

18.2%

18.2%

18.2%

9.1%

Wilmington, DE is also considered one of America's Most Irish Metros\*. Less promotional space was observed for St. Patrick's Day themed sections at Safeway and Acme utilizing our traditional holiday basket of goods. Shoprite used St. Patrick's Day themed sections on at least 6 circular pages in two circulars. In contrast, these themed promotions were only seen in the holiday week circulars at Safeway and Acme. Fresh Cut Flowers made up double digit promo shares at Safeway and Acme.

Acme I	Markets	Shopl	ShopRite		
Beef	27.4%	Beef	17.2%		
Fresh Cut Flowers	13.7%	Breads	16.0%		
Other Vegetables	10.3%	Deli Cheese	12.3%		
Breads	10.3%	Specialty Cheeses	7.4%		
Deli Cheese	10.3%	Fresh Cut Flowers	7.4%		
Cakes	8.6%	Cakes	6.1%		
Deli Beef/Roast Beef	6.9%	Morning Goods	6.1%		
Desserts	3.4%	Other Vegetables	4.9%		
Rolls	3.4%	Deli Beef/Roast Beef	4.3%		
Morning	3.4%	Rolls	3.7%		



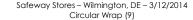






Acme (NAI) – Wilmington, DE – 3/14/2014 Circular Middle (2)







Goods

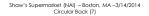
### **BOSTON MA MARKET – RETAILERS USED VARIED PRODUCT PROMOTIONS IN** 2014

Boston, MA is also considered one of America's Most Irish Metros. Demoula's Market Basket used small themed section throughout the 3/9/2014 circular. Shaw's Supermarkets used two promo sections in a 3/14/2014 circular. Donelan's promoted more Beef & Potatoes on pages containing St. Patricks' Day themed sections highlighting a traditional meal. These Donelan's promotions were seen in the 3/7/2014 circular.

Earlier promotions may have helped unit sales for holiday items.

Demoula's M	Narket Baske	et Donelan's Si	upermarkets	Shaw's Su	permarket
Breads	21.2%	Beef	56.3%	Other Vegetables	33.3%
Cakes	18.2%	Potatoes	9.4%	Beef	25.0%
Imported Beer	18.2%	Deli Beef/Roast Beef	9.4%	Bagels	16.7%
Morning Goods	9.1%	Fresh Cut Flowers	6.3%	Breads	16.7%
Beef	6.1%	Cheese	6.3%	Fresh Cut Flowers	8.3%
Deli Cookies	6.1%	Imported Beer	6.3%		
Bagels	3.0%	Breads	4.7%	St. Patric	K's Day Savings
Pies	3.0%	Bagels	1.6%	Comboard fam Copyrie Copyri Copyrie Copyrie Copyri Copyrie Copyrie Copyrie Copyrie Copyrie Copyrie Copyrie Cop	DE CONTROL POST DE CONTROL POS
Muffins	3.0%			Protection of the Control of the Con	Resh Qui seed Dhors kg
Desserts	3.0%			Worderful 999 Microstry Solve Design Toward or Design Toward or Solve Design Toward or Desi	Feath Cut Control Stole

\*America's Most Irish Towns. http://www.forbes.com/sites/trulia/2013/03/15/americas-most-irish-towns/





Demoula's Market Basket - Boston, MA - 3/9/2014 Circular Front (1)



Demoulas Market Basket - Boston, MA - 3/9/2014 Circular Back (10)



Shaw's Supermarket (NAI) - Boston, MA -3/14/2014 Circular Front (1)

Donelan's Supermarkets - Boston, MA - 3/7/2014

greet buys on Traditional

St. Patrick's Day Favorites

USDA Choice POINT CUT Corned Beef Brisket

CORNED BEEF



sourced 3/6/2015

Circular Middle (3)

### **CONTACT INFORMATION**

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