

# Breaking Down Retail's First Half 2022



A RetailWire webinar sponsored by:



**Placer.ai**

### George Anderson

Editor-in-chief, RetailWire

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George Anderson has served as the editorial voice of RetailWire since the site's founding in 2002 and has been interviewed by a wide variety of media outlets including the Charlotte Observer, Providence Journal, MarketWatch, NPR, Wall Street Journal Radio and others.

Previously, he served as president and creative director of IdeaBeat Creative and prior to that spent eight years with Progressive Grocer Associates/Maclean Hunter Media, where his assignments included work in the company's four divisions: Progressive Grocer, Frozen Food Age, Retail Technology and Retail Insights.

# The retail industry's premier online discussion site

## Uniquely engaging

Three active, in-depth online discussions each business day

## Influential community

Mid to top management from a variety of retail disciplines

## Collective thinking

Sharp editorial, plus the combined expertise of over 125 RetailWire BrainTrust panelists.

The screenshot displays the RetailWire website interface. At the top, there are social media icons (Twitter, LinkedIn, Facebook, RSS) and user information: RICK MOSS // LOGOUT // NEWSLETTER SIGN UP // SEARCH. The main navigation bar includes: FRONT PAGE, DISCUSSIONS, RETAIL NEWS, RESOURCES, BRAINTRUST, MARKETING, ABOUT. The date is WEDNESDAY, 06/12/2019.

The main content area features three discussion topics, each with a 'DISCUSSION' label and a 'BRAINTRUST' insight:

- Has Barnes & Noble found its savior(s)?** (Jun 12, 2019, 17 EXPERT COMMENTS). BrainTrust insight: "The retail graveyard is filled with well-known brands that have fallen victim to excessive debt loads and their own dated business practices." by Dick Seesel, Principal, Retailing In Focus LLC.
- What does FedEx's break with Amazon mean?** (Jun 12, 2019, 16 EXPERT COMMENTS). BrainTrust insight: "I suspect Amazon is placing unreasonable cost demands on FedEx. Glad they are saying no." by Paula Rosenblum, Managing Partner, RSR Research.
- Kroger is high on the CBD sales opportunity** (Jun 12, 2019, 11 EXPERT COMMENTS). BrainTrust insight: "CBD in retail is expected to be a \$22B business by 2022. Retailers who aren't already making moves to take advantage of this \$22B opportunity have missed the boat." by Bethany Allee, Vice President Marketing, Cybera.

On the right side, there is a section for **IRI EARLY VIEW 2019: Consumer Food and Beverage Spending Trends**, with a 'GET A COPY!' button and the IRI logo. Below this is a **TRENDING** section with categories: Consumer Marketing, Online Retail, Management Strategy, Products Brands, Human Resources, Operations, Customer Service, Category Management, Amazon, and Retail Tech.

At the bottom, there is a **RESOURCES** section with three featured articles:

- Your POS should be a point of engagement (Manhattan Associates)
- IRI's Early View 2019: Consumer Food and Beverage Spending Trends
- See How Retailers Can Lead with Unified Commerce

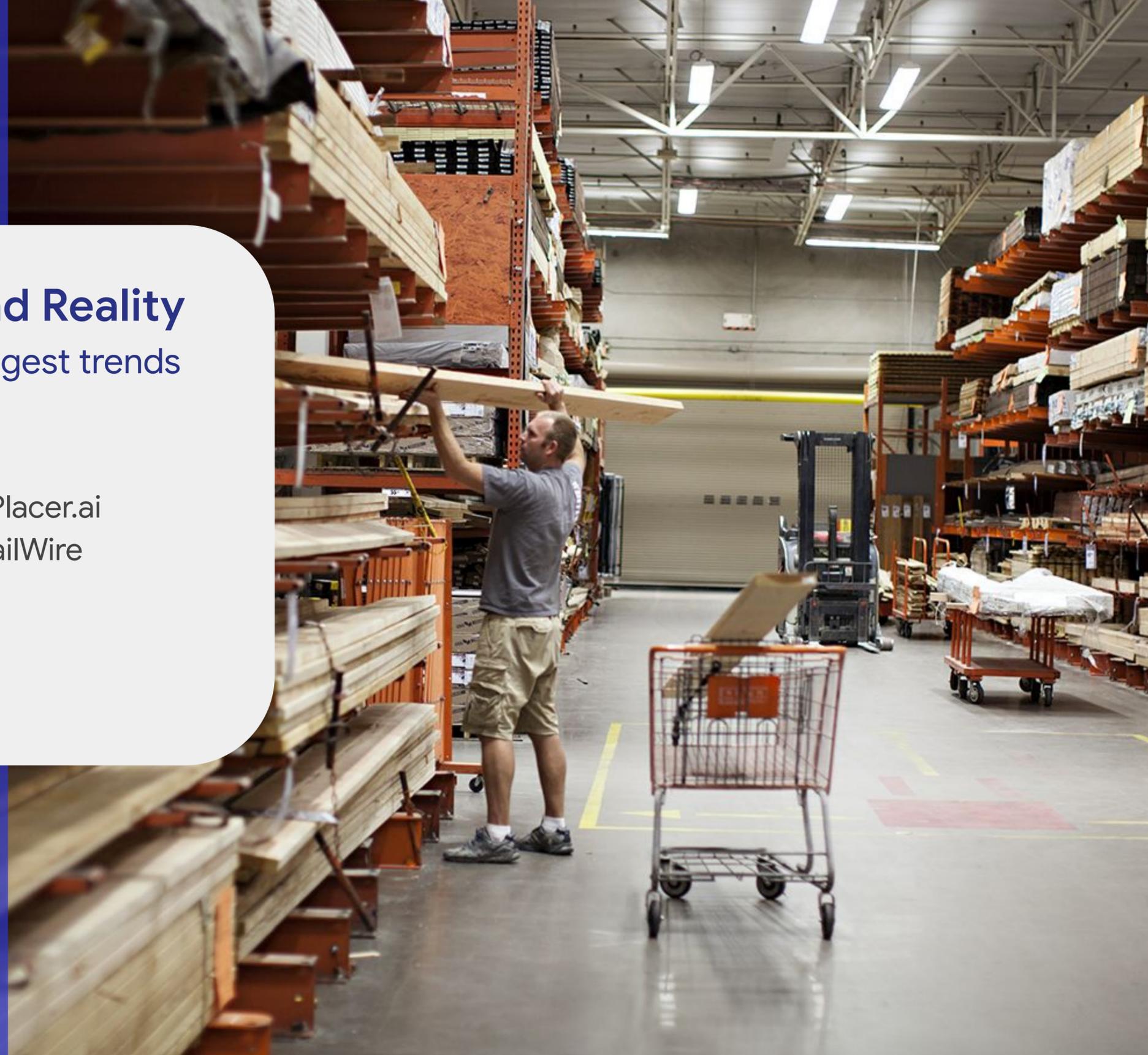
## Today's agenda

### Retail in 2022: Expectations and Reality

Analysis and discussion on the year's biggest trends to-date using location data

- Ethan Chernofsky, VP of Marketing at Placer.ai
- George Anderson, Editor-in-chief, RetailWire

Audience Q&A



Featured speaker

## Ethan Chernofsky

VP of Marketing, Placer.ai

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Ethan Chernofsky is the VP of Marketing at Placer.ai having led the company's marketing since its inception.

Prior to Placer, Ethan was Director of Corporate Marketing at Digital Intelligence company SimilarWeb and the Vice President at Headline Media.



Placer.ai <> RetailWire

# Retail in 2022

## *Expectations and Reality*

June 2022



# Introduction



# How Placer.ai Works

Observe. Analyze. Present.



For any location in the U.S., Placer.ai observes a portion of the visiting customers. Akin to a statistical survey, this observed data is aggregated and used to generate insights into any venue. Placer.ai then extrapolates a range of metrics that provide visibility into consumer behavior.



## 01 - Observe

Anonymized location data from tens of millions of mobile devices used as a core panel.

- 30M Active Devices
- 1.5B Monthly Retail Visits
- 500 Mobile Apps w/ SDK



## 02 - Analyze

Accurate and reliable estimations on activity across the entire U.S. population.

- Extrapolated Panel Data
- Normalized & Debiased
- "Ground Truth" Validated



## 03 - Present

A wealth of detailed reports containing critical insights into what is truly happening offline.

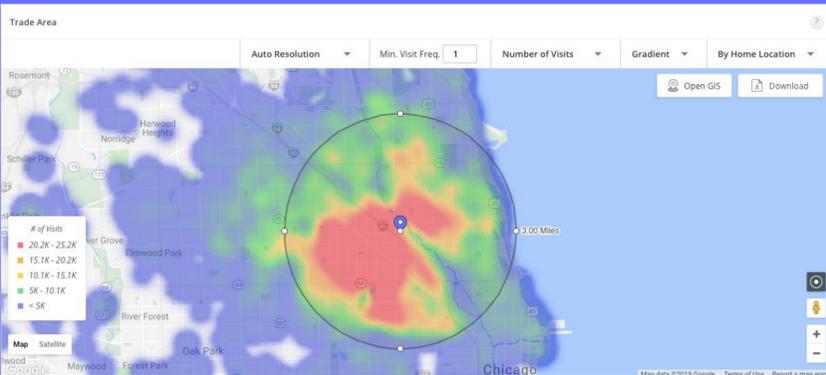
- Visitation Trends
- Trade Area Analysis
- Customer Demographics

# Telling The Full Story of Any Location

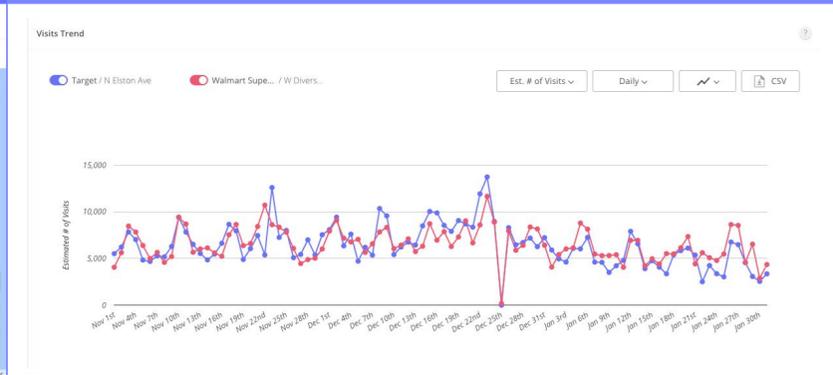
Observe. Analyze. Present.



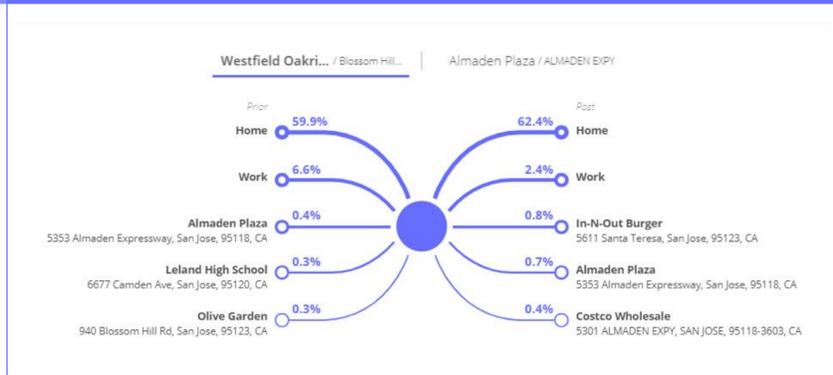
## Trade Area Analysis



## Visitor Counts



## Customer Journey



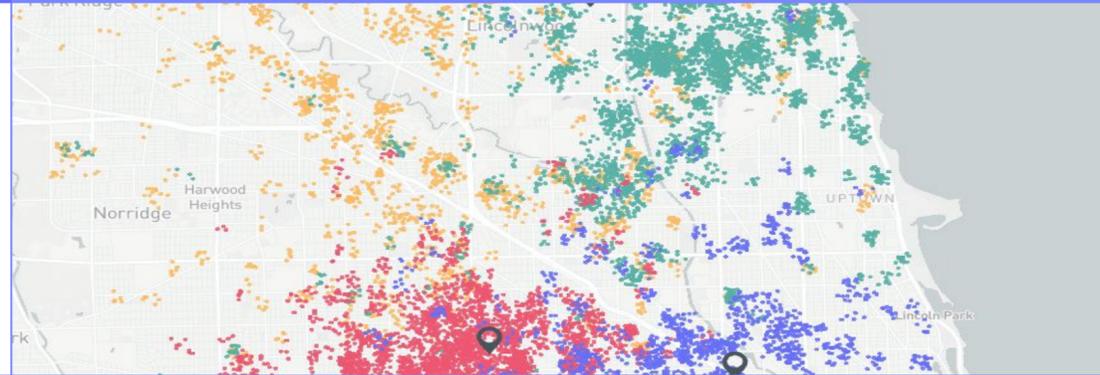
## Customer Demographics



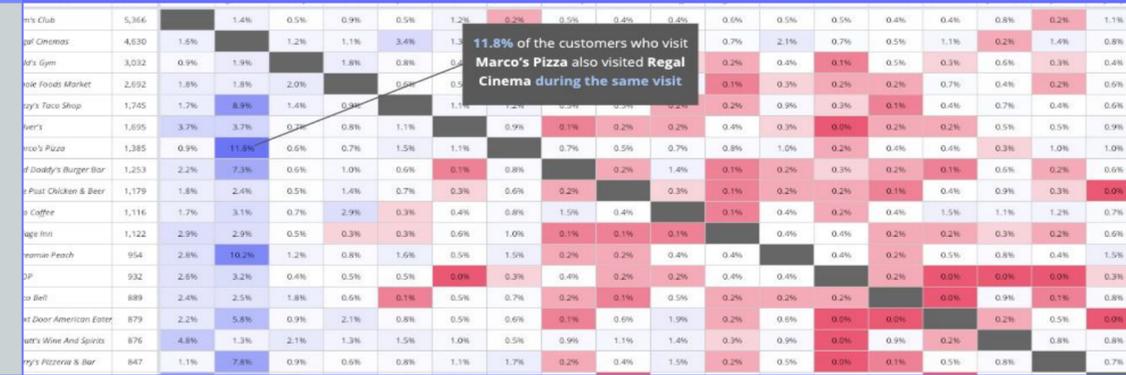
## Competitive Benchmarking



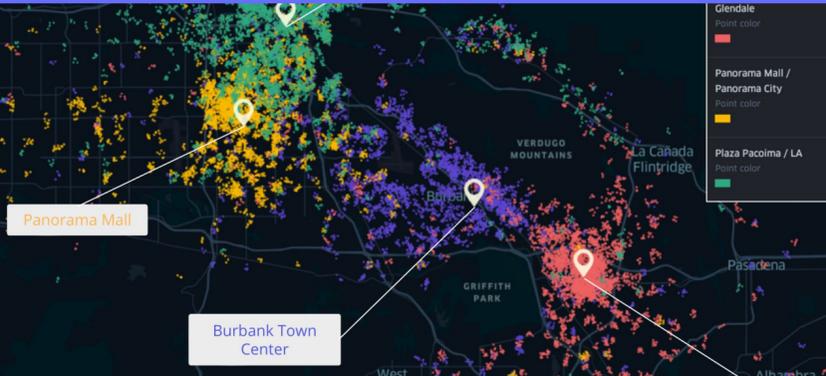
## Void Analysis



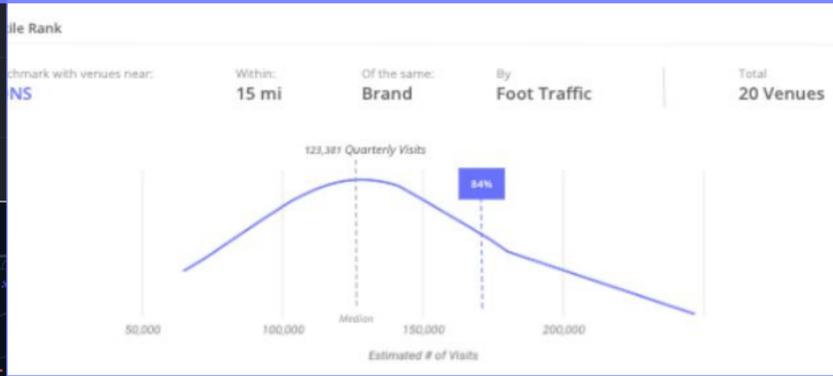
## Cross Shopping



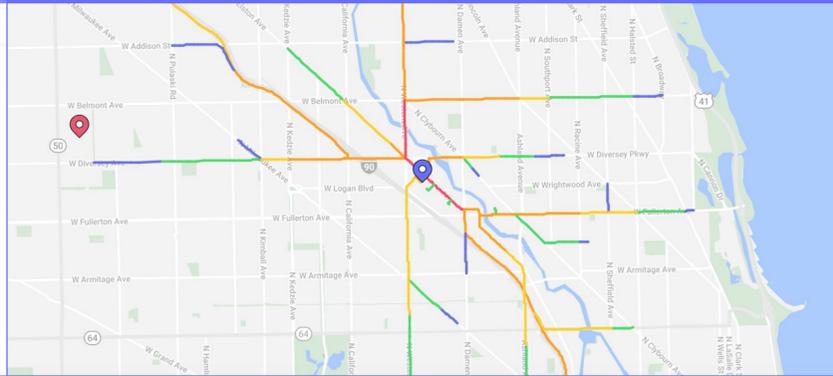
## Cannibalization



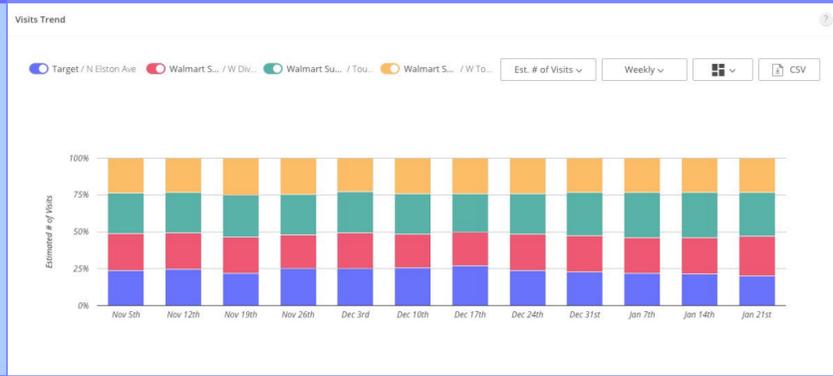
## Store Benchmarking



## Traffic Routes



## Market Share

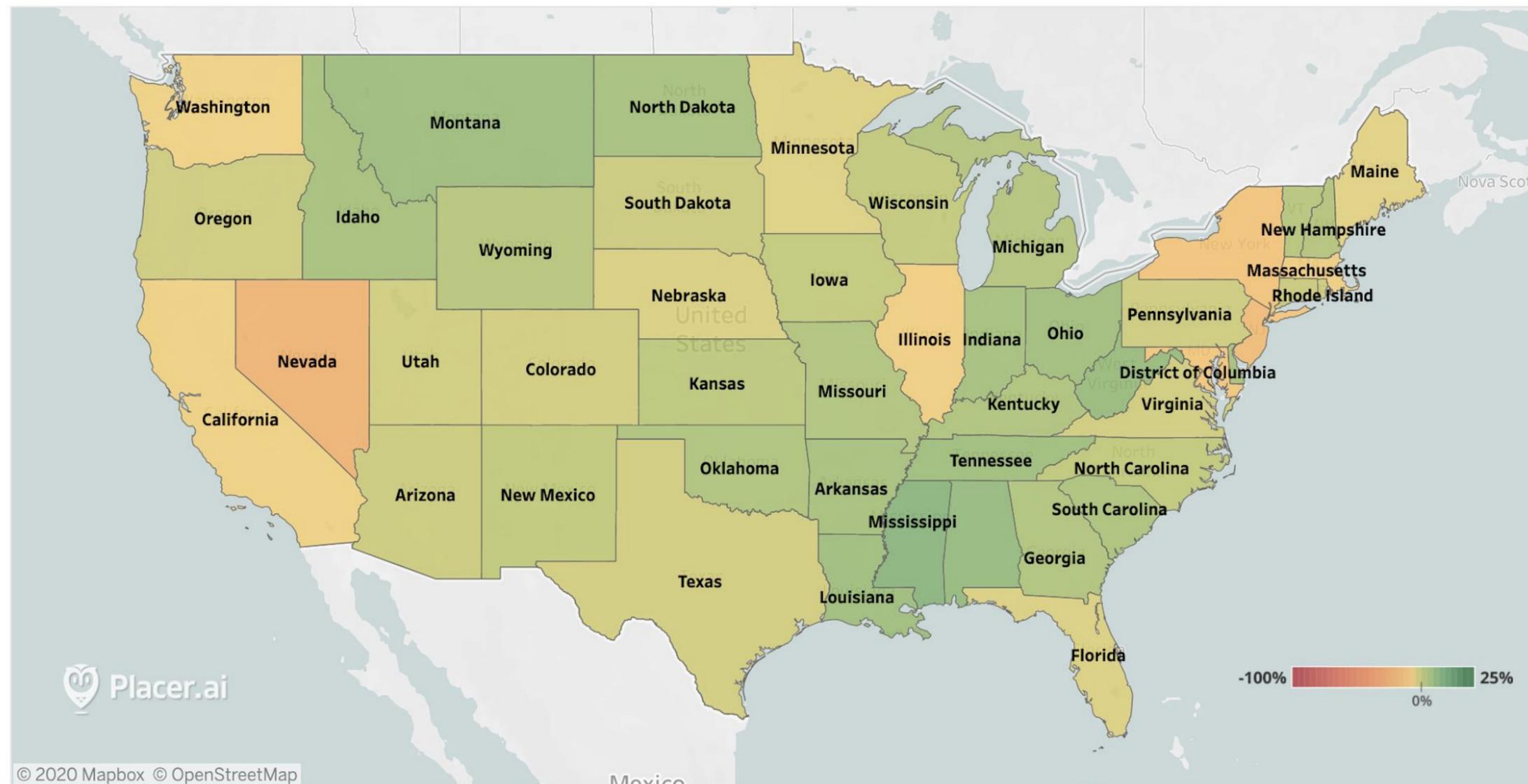


# The Square

www.placer.ai/the-square/

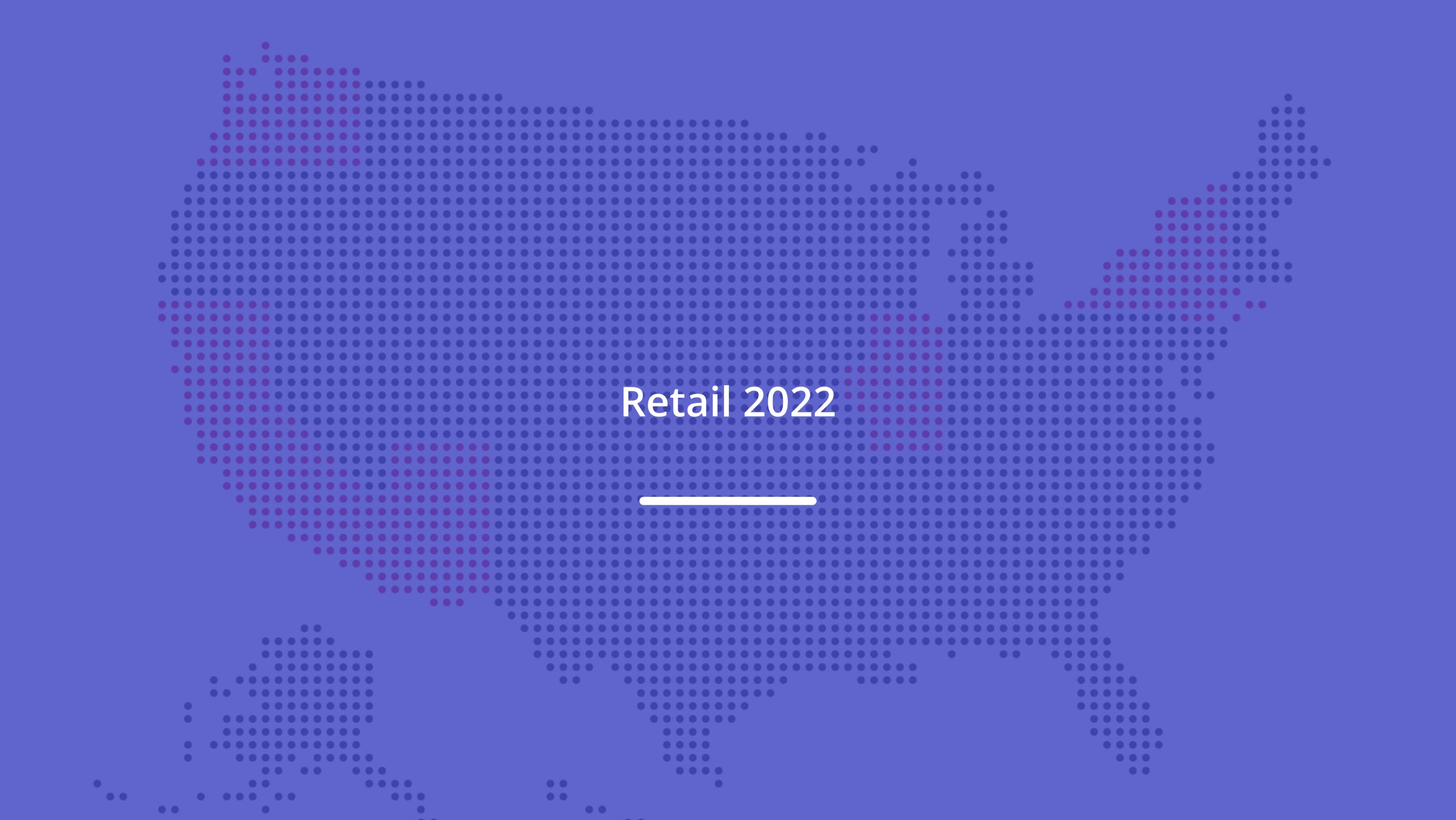
Industry Trends   Brand Tracker   Brand Dominance Map   Insights Weekly Digest

## Recovery Trend - YoY Foot-traffic % Change



### Iowa Overall Change

All Categories	-7.89%
Apparel	-3.89%
Dining	-26.55%
Electronics	-24.02%
Fitness	-28.30%
Groceries	-6.43%
Home Improvement	24.29%
Hotel/Casinos	-54.10%
Medical & Health	0.57%
Shop & Service	8.55%
Shopping Centers	-20.53%
Superstores	0.73%



# Retail 2022



# A Challenging Start

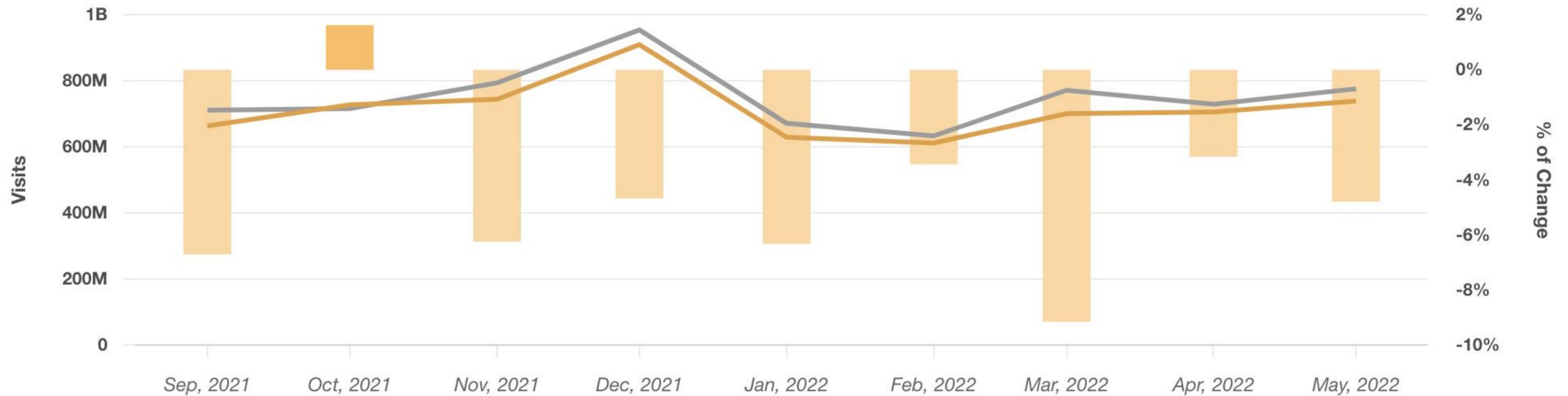
Can the sector overcome?



Industry:

Shopping Centers / Nationwide

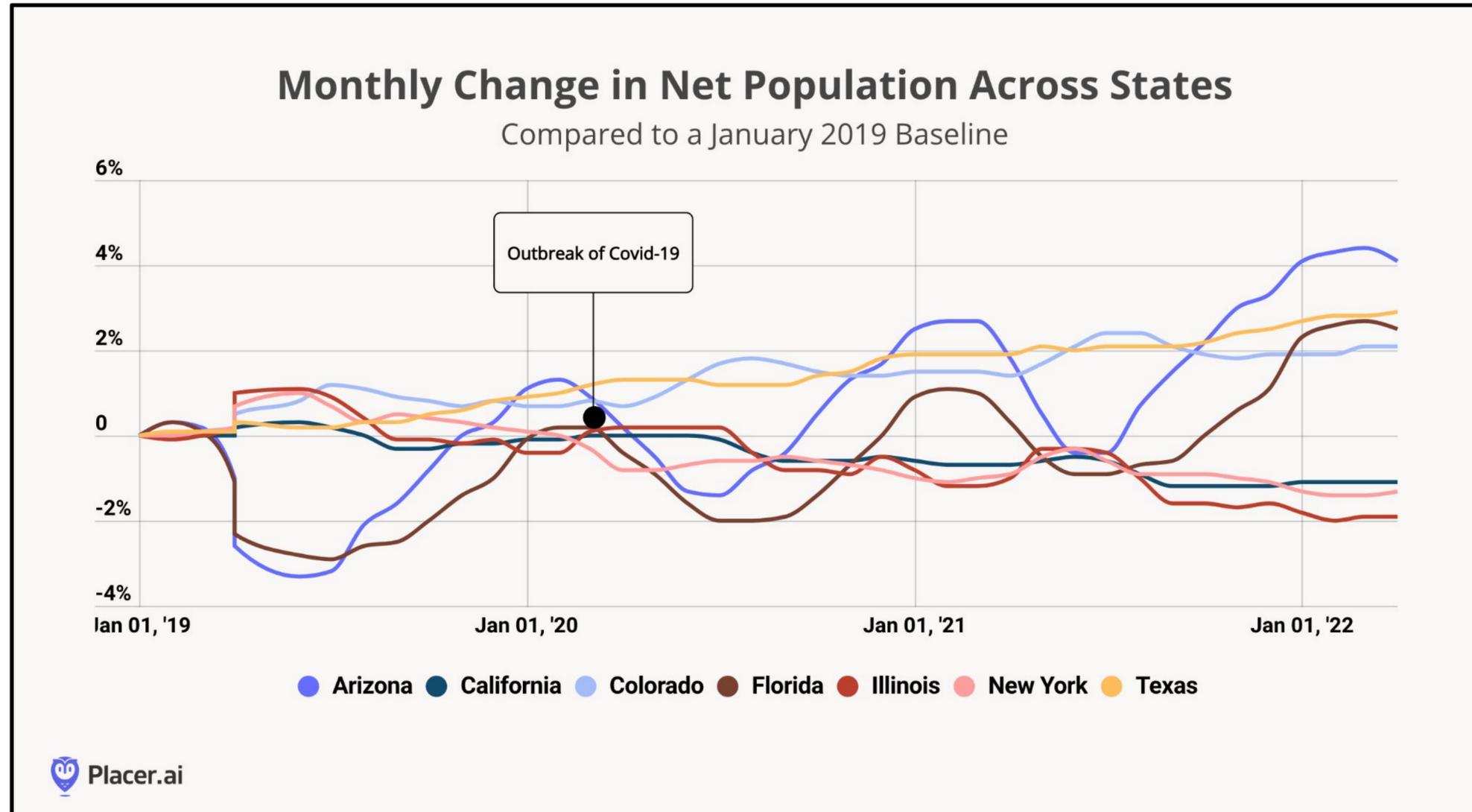
● 3 Years Ago



**How can retailers cope with the volatility?**

# The Impact of Migration

Is the impact as large as we thought it could be?



**How significant of a change has it been?**

# The Retail Media Network

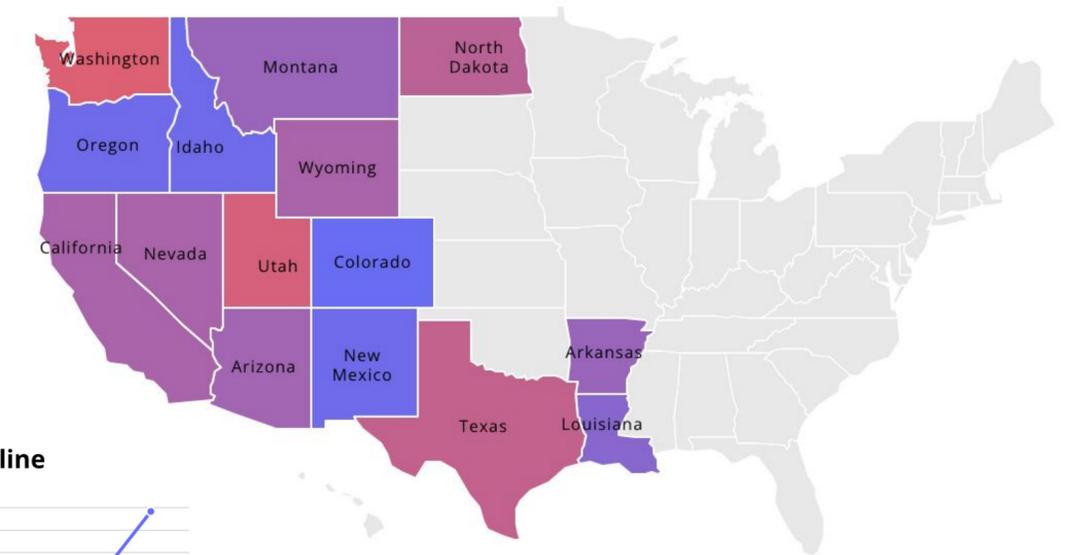


A next step or a sea change?

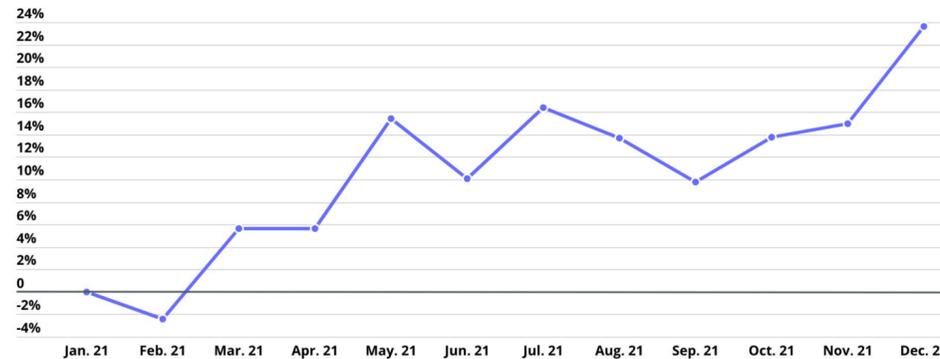
## Web Searches: National Index at Top Performing Albertsons Locations



## Visits to Albertsons - Q1 2022 Compared to Q1 2019



## Monthly Visits to Albertsons - Compared to January '21 Baseline



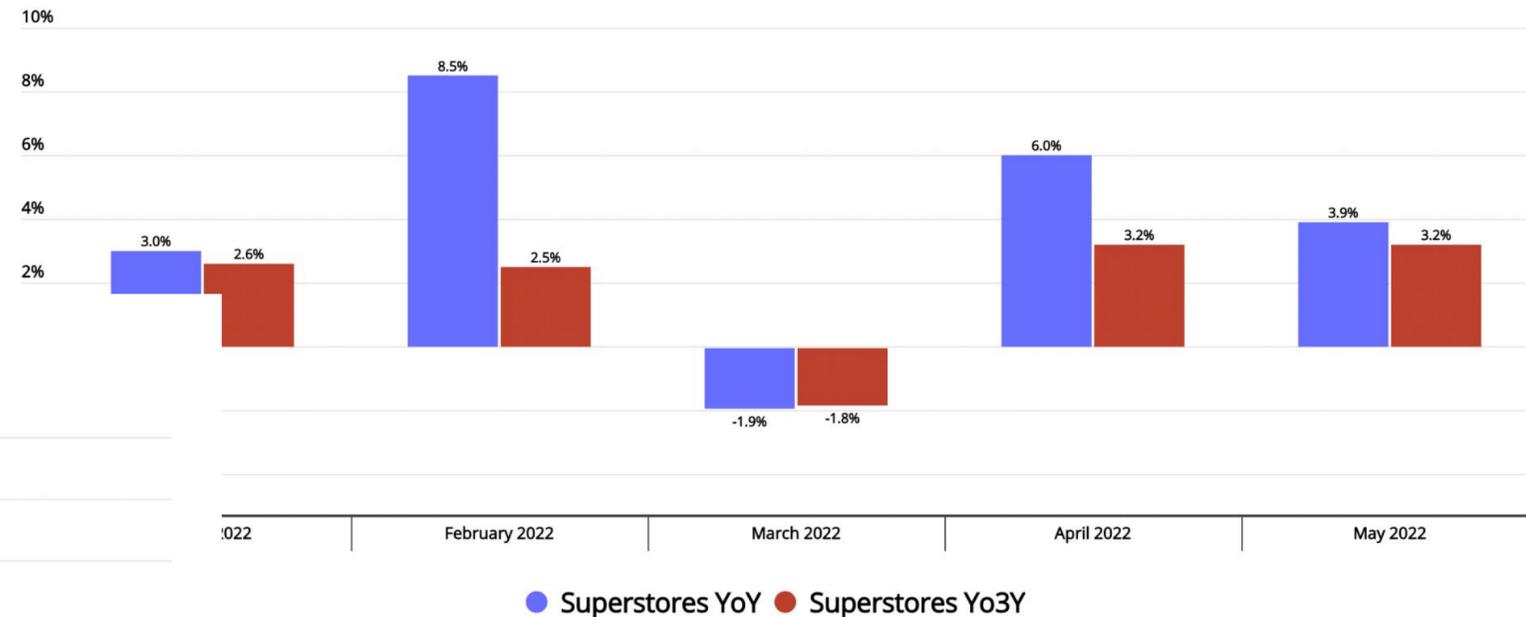
Can this trend unlock the full value of the store for retail?

# What Is Driving the Continued Success?

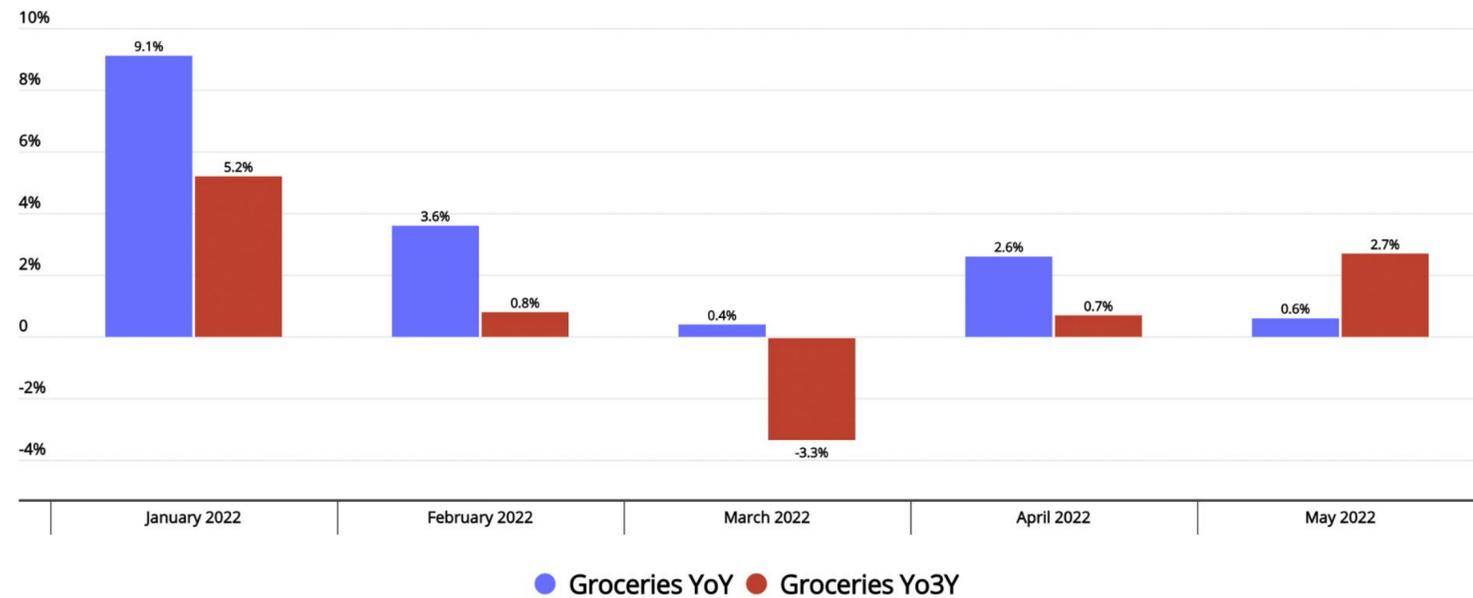


Are there common traits?

### Superstore Visits Compared to 2021 and 2019



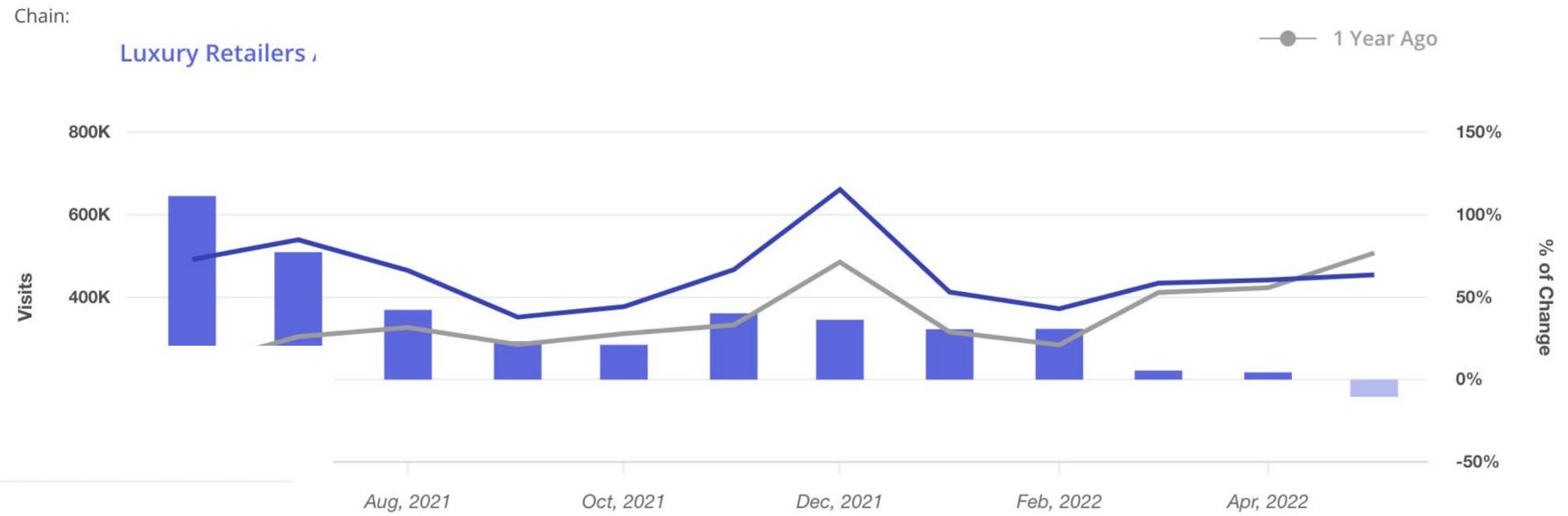
### Grocery Sector Visits Compared to 2021 and 2019



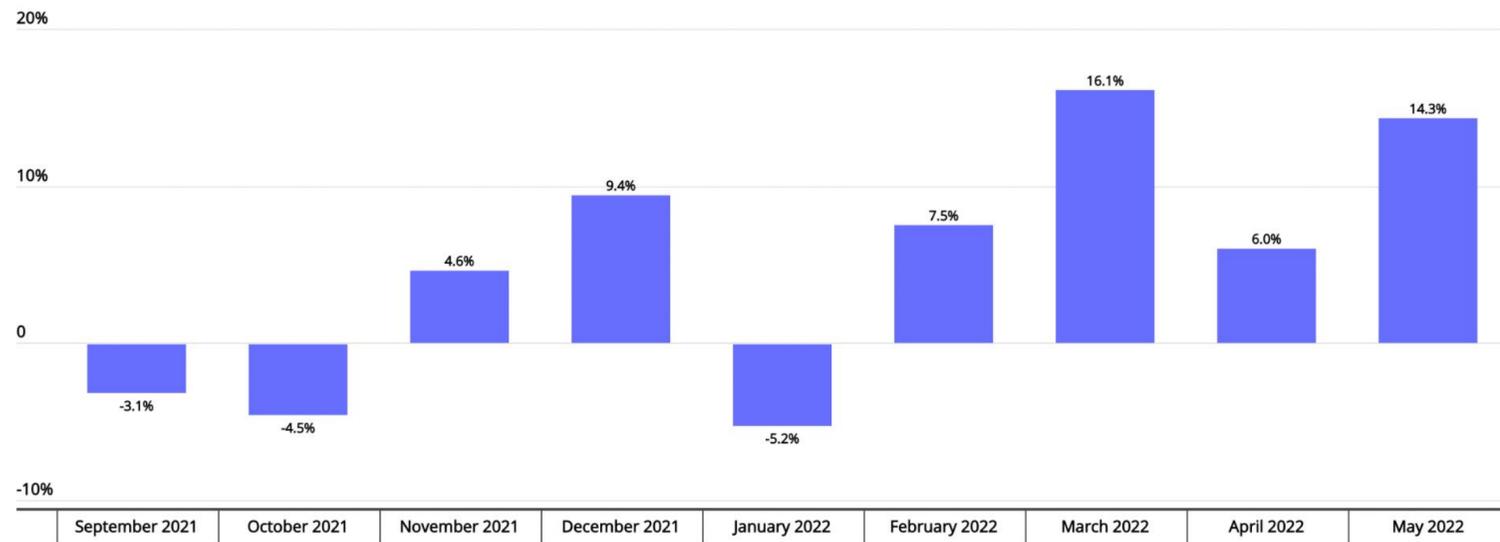
## What is driving the ongoing strength?

# The Surprises

A next step or a sea change?



## Fitness Visits - Year over Three Year



● Fitness Yo3Y

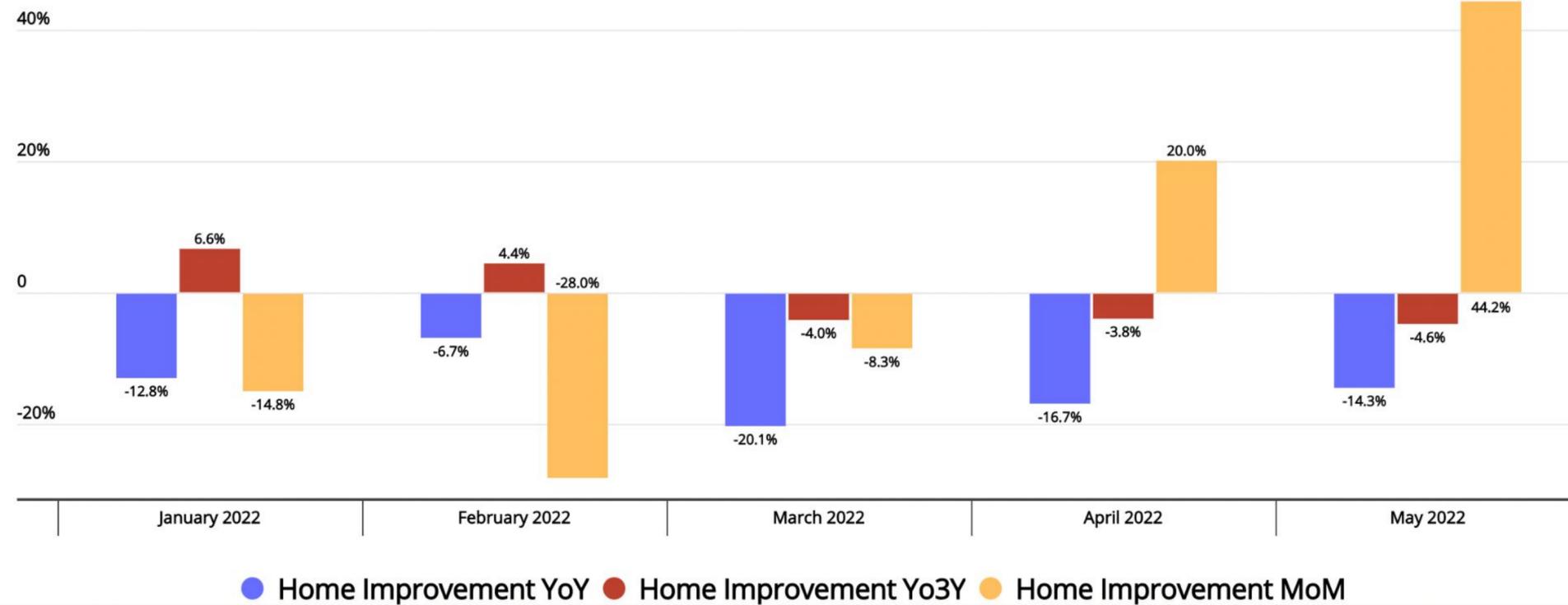
### Will the trends continue for these segments?

# Is the Rebound on the Way?



And how significant is this for the wider retail community?

## Home Improvement Strength Returning



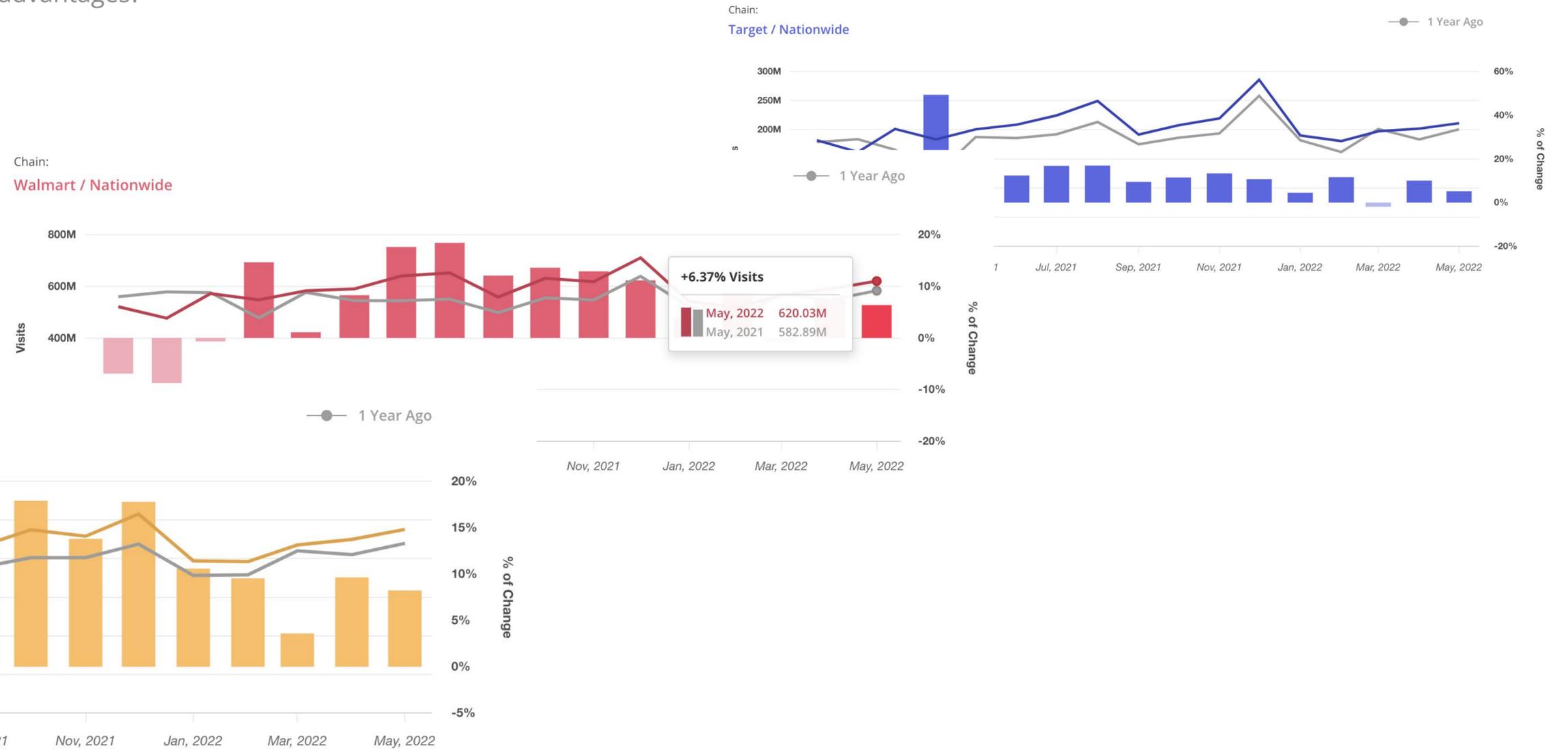
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**What are the wider lessons from overall category performance?**

# Who is Well Positioned?



What should we make of the most important advantages?



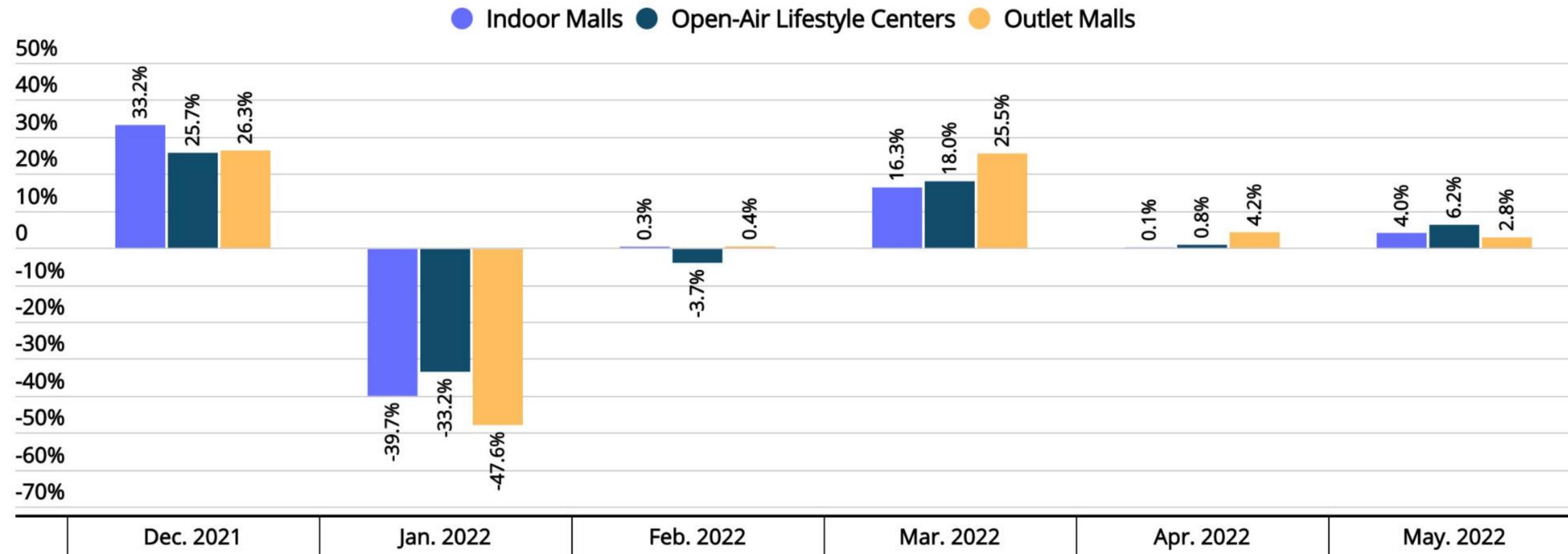
**What are the keys to defining the successful?**

# How are Malls and Shopping Centers Changing?



New demands on retailers?

## Change in Monthly Mall Visits - Month-Over-Month Comparison

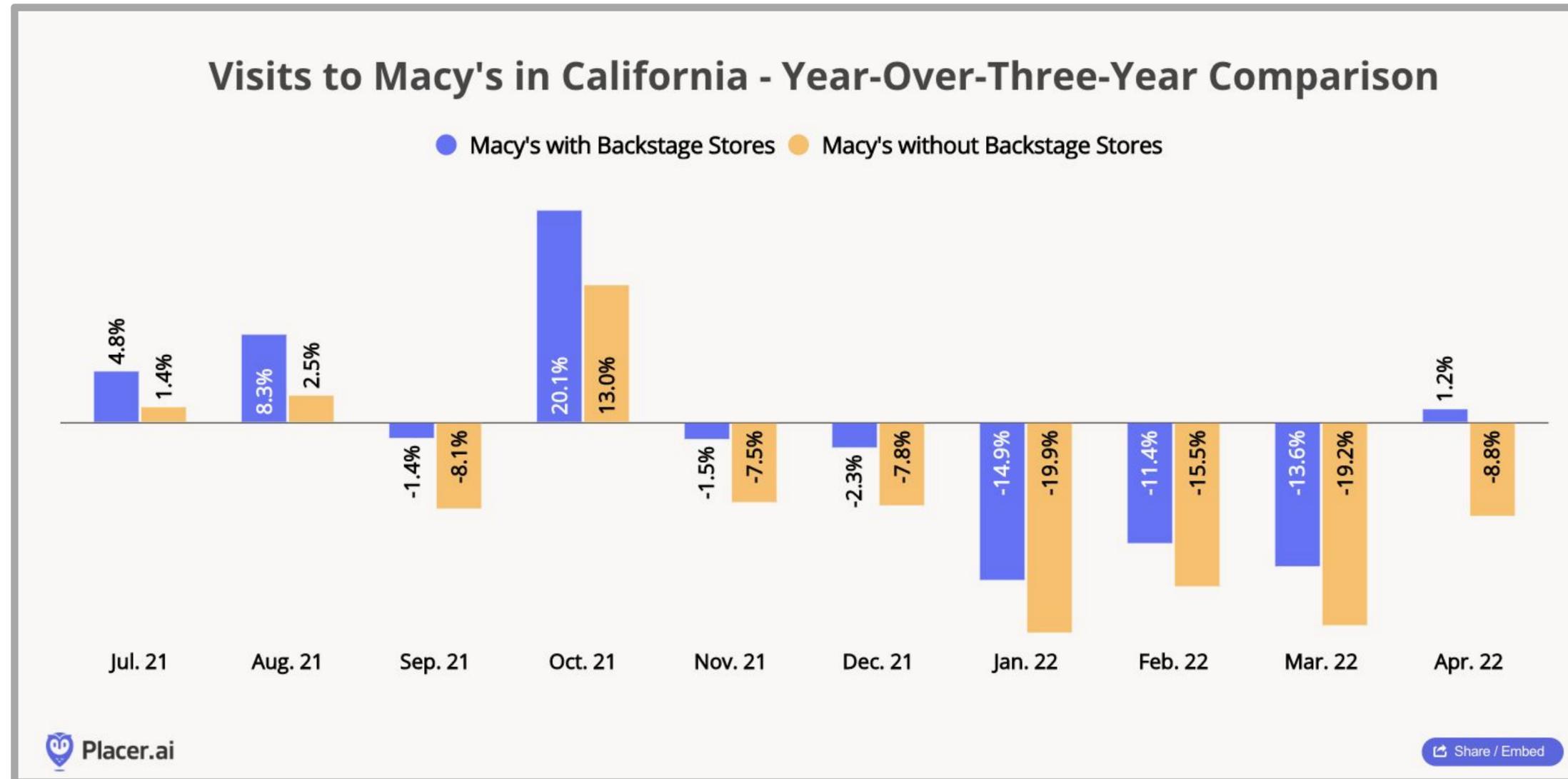


And what does this mean for retail?

# Innovate to Thrive?



How significant is the trend of new concepts?



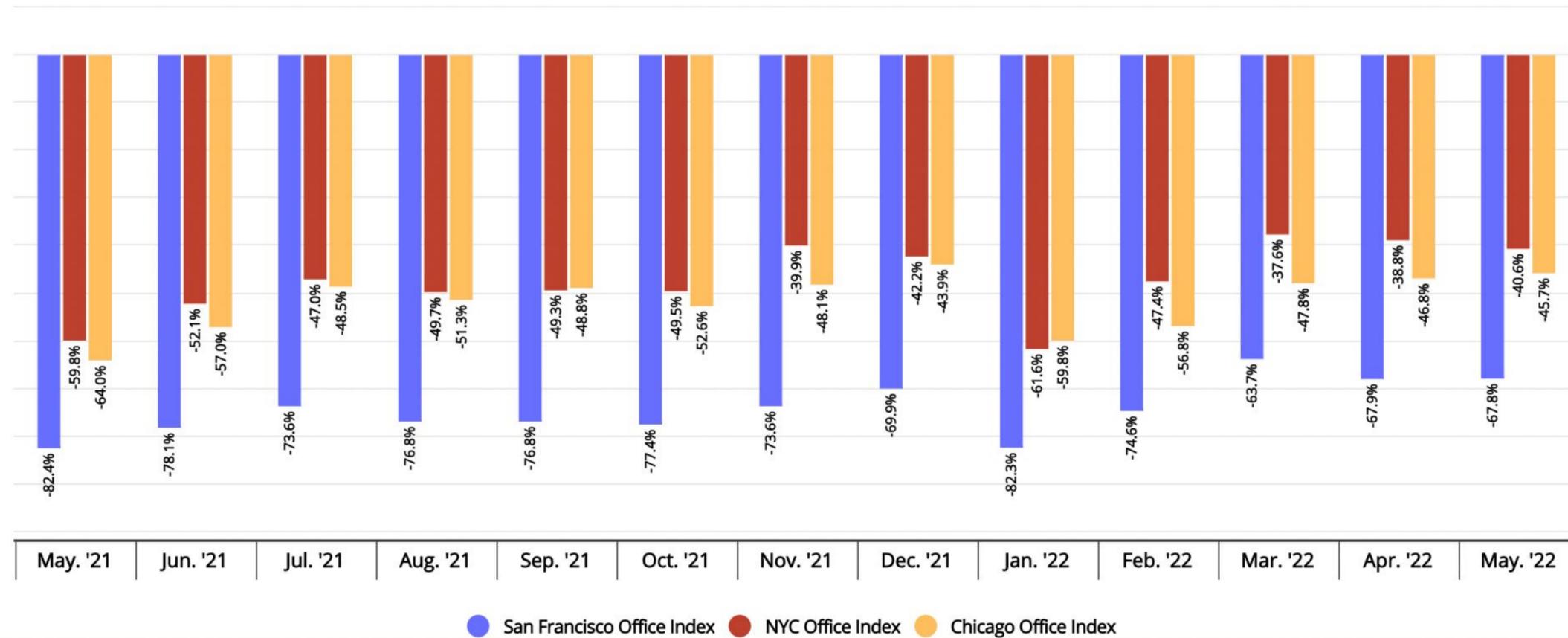
**Why is the run of new concepts so important?**

# Time to Give Up on the Office?



Is this trend a guarantee?

## Placer.ai Office Building Indexes - Year over Three Year



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### What are the implications?

# We Need to Talk About DNBs?

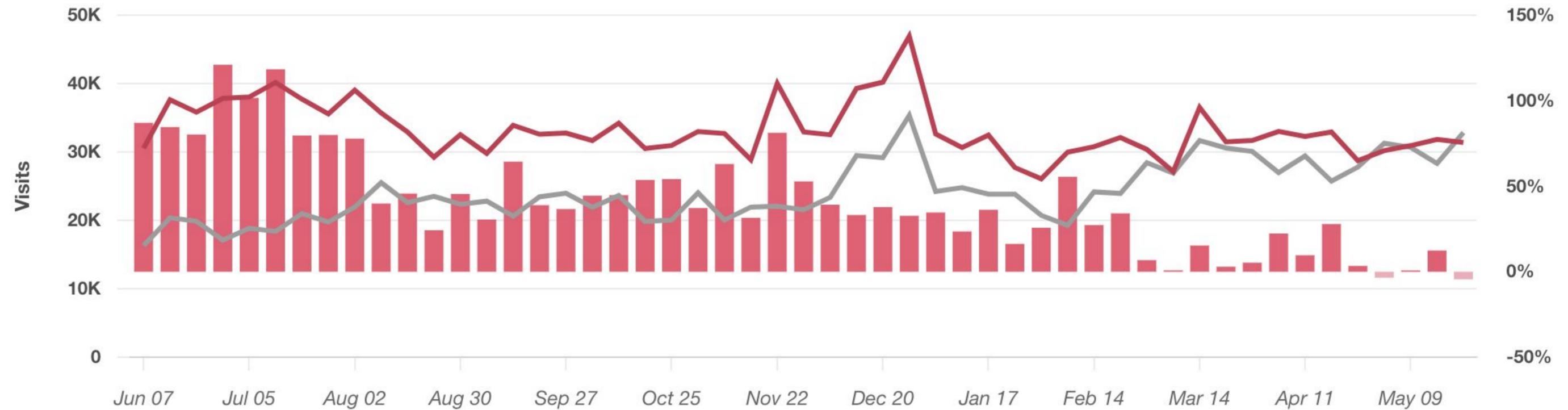


Time to give up on this promising group?

Chain:

Warby Parker / Nationwide

● 1 Year Ago



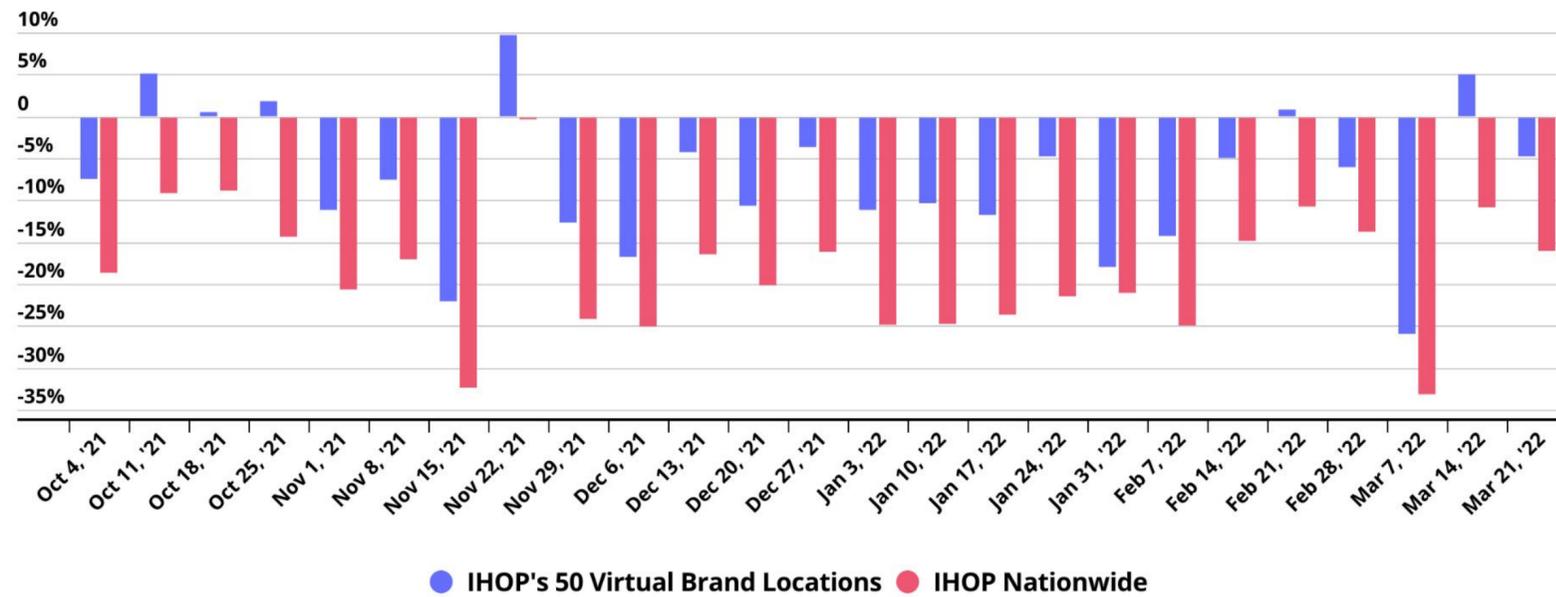
**Has the digitally native hype trend come to an end?**

# Omni's Next Step

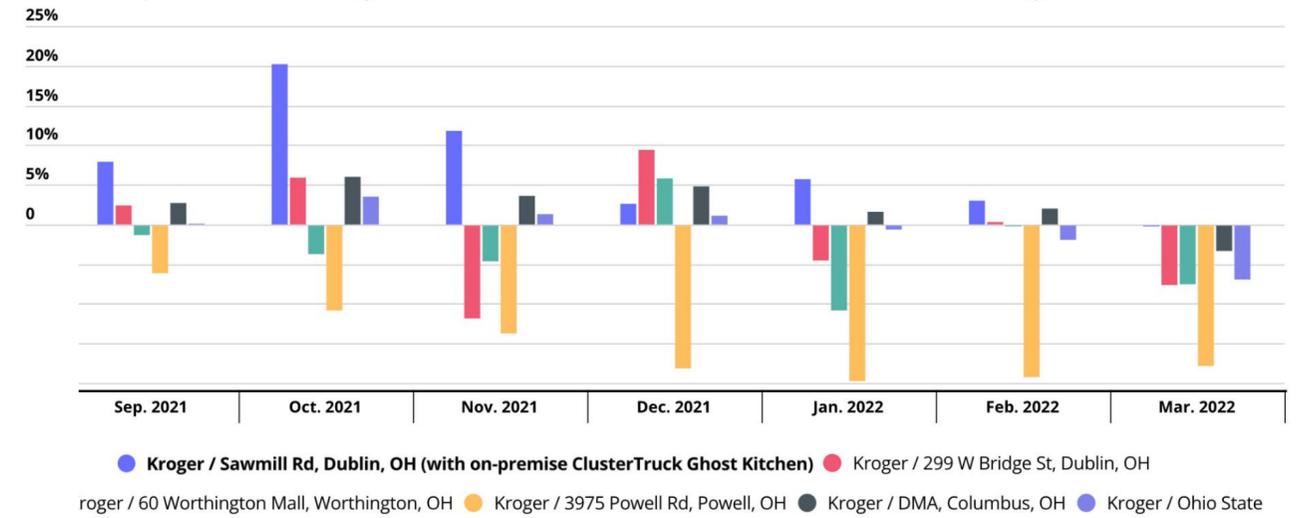
Can this trend continue to define retail?



## IHOP's Virtual Brand Launch - an Offline Success Change in Weekly Visits - Yo3Y Comparison



## Monthly Visits to Kroger Locations - Year-Over-Three-Year Change



er.ai



What is the key to maximizing the potential?



Thank you for joining us!  
Sign-up free at [Placer.ai](https://Placer.ai)

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For more information



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