



Emerging Media Plan Presentation

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Executive Summary

TOPS is a long-standing, community-based, regional grocery chain that is being threatened by the evolving grocery marketplace.

We aim to show how TOPS can protect its market share by building upon its current strengths, and gain new market share by adapting to its customers changing needs

TOPS will need to invest heavily into digital media in order to survive in today's competitive grocery market, while at the same time remain true to its community-based roots to distinguish itself from the competition.

Marketing Problem

- Wegmans and Trader Joe's offer a premium shopping experience
- Walmart and Target are able to leverage their pre-existing customer base
- Mobile and digital are changing how consumers shop for groceries
- The TOPS brand is dated

Situational Analysis - SWOT

Strengths

- Loyal customer base
- Reputation as a neighborhood store
- Scales stores to match communities

Opportunities

- Online shopping
- Community partnerships
- Modernize brick-and-mortar

Weaknesses

- Slow to adopt online shopping
- Poor quality/high prices
- Older stores

Threats

- Hypermarkets—Wegmans/Target
- Online retailers—Amazon
- Locals—Wegmans/Trader Joe's

Situational Analysis - TOPS' History



1962 - Armand Castellani opens the first TOPS in Niagara Falls

1970s - TOPS expands to the Rochester area and opens its first out-of-state location in Bradford, PA

1991 - TOPS is purchased by Dutch food conglomerate Ahold

2007 - TOPS is sold to Morgan Stanley Private Equity

2010 - TOPS acquired The Penn Traffic Company, adding 64 new stores

2012 - TOPS purchases 21 Grand Union Family Markets stores

2013 - *Orchard Fresh* specialty food market opens in Buffalo, NY

2013 - Led by now Chairman and CEO Frank Curci, TOPS is purchased from Morgan Stanley Private Equity, returning it to complete local ownership

Today - Headquartered in Williamsville, NY, TOPS has 182 full-service supermarkets with over 15,000 employees



Situational Analysis - History of the Market

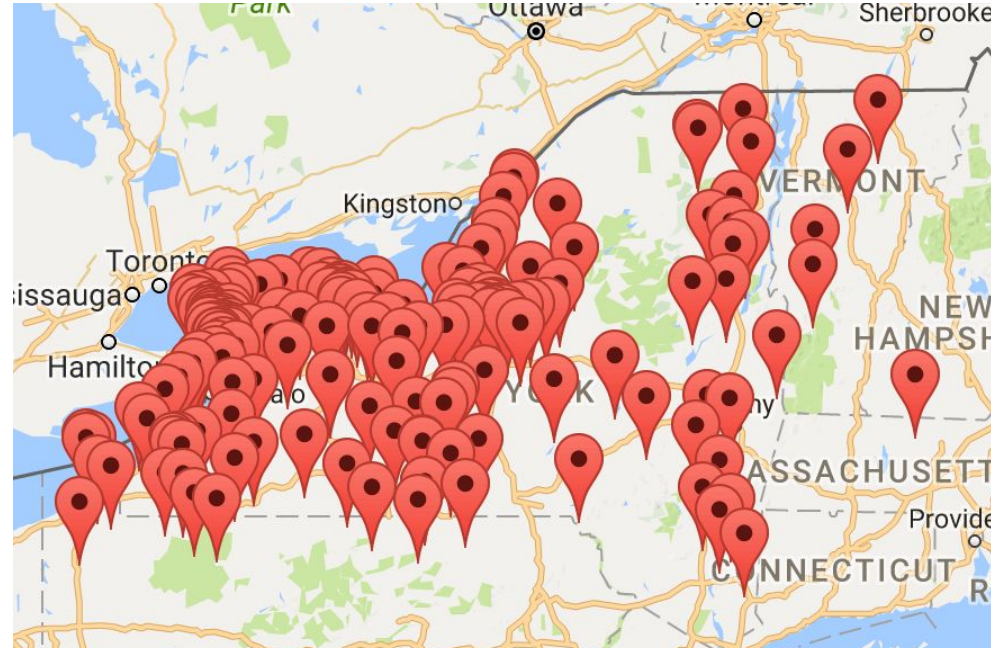
Grocery is changing

- Healthy eating—consumers want fresh foods, organics, and prepared foods
- Retailers are driving prices down giving more consumers access to healthier foods
- Discount chains like Aldi's that offer store brands and a unique shopping experience are growing
- Online shopping from Walmart, Amazon, and now Wegmans
- Home delivery is becoming widely available
- More chains are embracing technology—click-and-collect, auto refill, subscription, virtual stores, digital coupons, and online shopping lists

Worldwide, **25%** order groceries online, **55%** say they are willing to

Situational Analysis - Distribution Channels

- 182 Stores
- Headquartered in Williamsville, NY
- Locations in New York, Massachusetts, Pennsylvania, and Vermont
- The majority of stores are located in western New York around Buffalo, Rochester, & Syracuse
- Only 3 in Vermont and 1 in Massachusetts



Situational Analysis - Competition



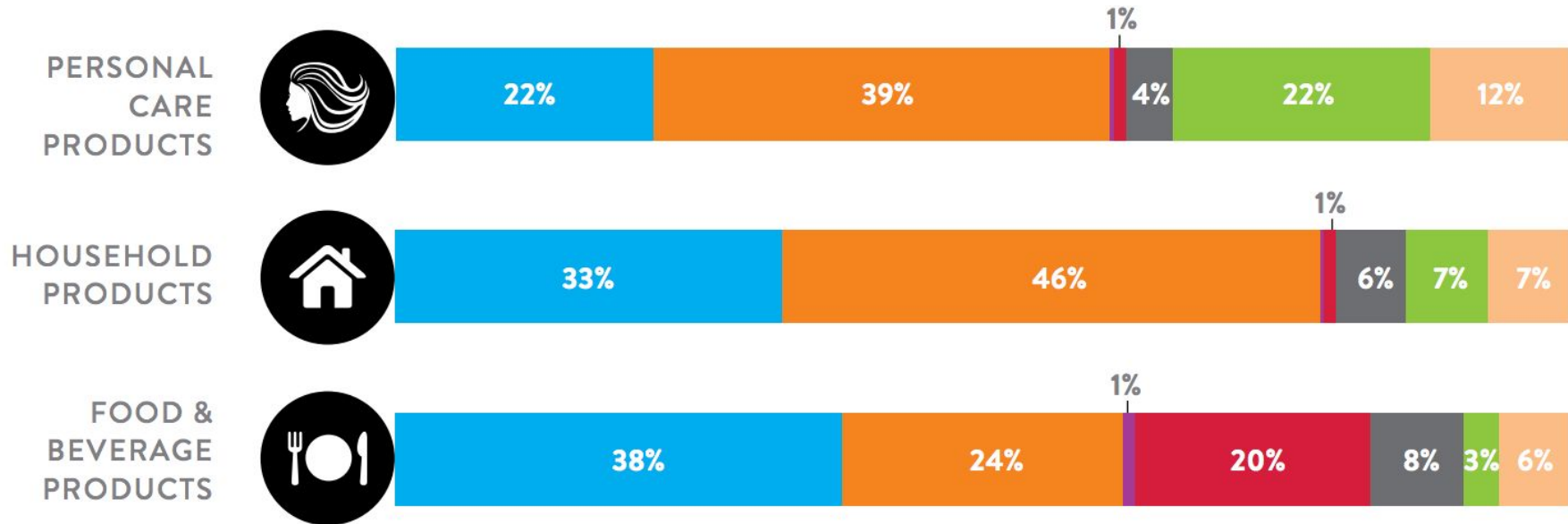
Situational Analysis - Product Consumer

Behavior	Willing to use	Already using
Use online or mobile coupons	54%	26%
Use online or mobile shopping lists	53%	18%
Download retailer app or loyalty program app to their mobile phone to receive information or offers	51%	15%
Login to store wifi with their mobile to receive more information or offers	54%	12%
Scan QR codes with mobile phone to access more detailed product information	55%	12%
Use self-service checkouts	45%	41%
Use hand-held store scanner to purchase products as they shop	65%	10%

Situational Analysis - Product Consumer

PERCENT SHARE OF TRADE BY CHANNEL

● LARGE SUPERMARKET ● HYPERMARKET ● TRADITIONAL ● CONVENIENCE
● SMALL SUPERMARKET ● DRUG ● OTHER



Situational Analysis - Product Consumer

Which attribute drives you to switch stores?



Marketing Objectives

- Build brand awareness within the community
- Differentiate from competitors like Wegmans, Amazon, & Walmart
- Retain current customer base
- Leverage technology to gain new customers
- Stress the “neighborhood friendly market” aspect of our brand
- Gain back lost market share

Emerging Media Elements - Consumer Engagement

In store and online

Customers turning to Wegmans

- Customer Service
- Online Engagement
- Loyal customers

Tops needs stronger digital presence

- Website
- Google
- Social
- App



Emerging Media Elements - Consumer Engagement

Micro Moments

Be there

- Google Search Network
- Google Display Network
- Social Ads
- Consumers spend more with a business if they engage or have a digital presence.

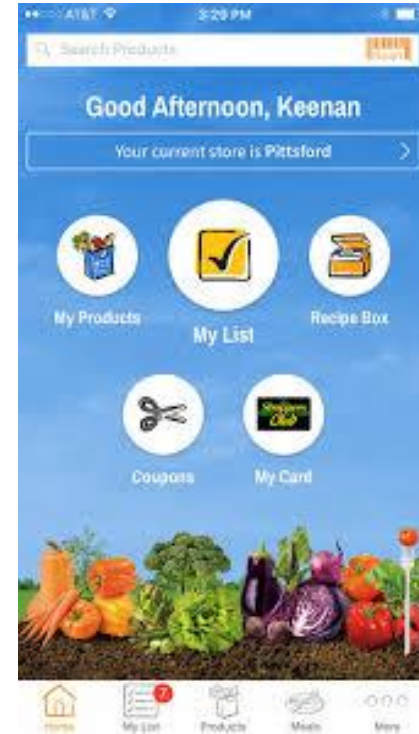
Be useful

- Wegmans Shoppers Club
- Recommendations
- Grocery list app
- Macronutrients and ingredients
- Recipes
- Smart Fridges

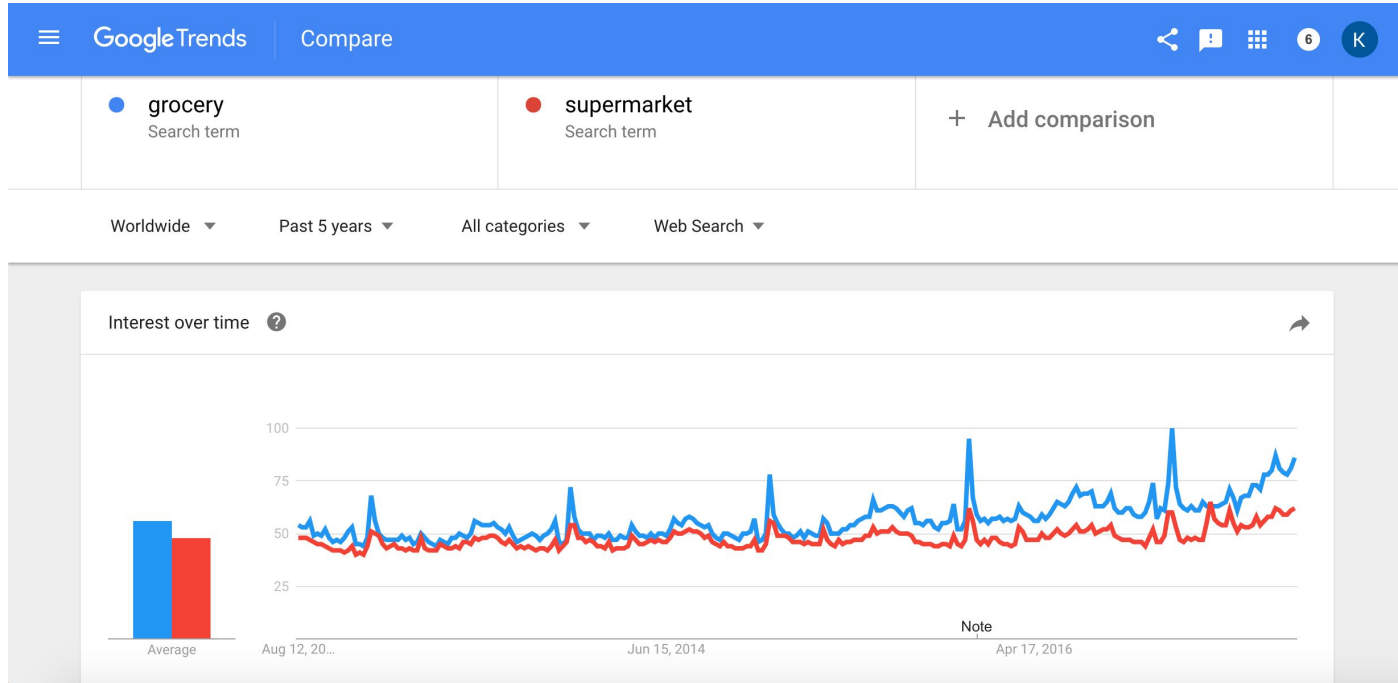
Be Quick

- Top of search results
- Products up to date
- Sm response
- Quick to trends on SM

Emerging Media Elements - Consumer Engagement



Emerging Media Elements - Consumer Engagement



Searches high in
December/Holiday
season

Pulsing

Emerging Media Elements - Consumer Engagement

Customer Referrals

Conferences/Community involvement

New Products on website and SM

- Ice Cream name contest

Less sales pitch, more relationship building

- Provide relevant info - not “Come in and buy from us!”

Emerging Media Elements - Everything as Channels

Paid

- Google Adwords
 - “Grocery store, best grocery, grocery coupons, grocery near me”
- Google Display Network
- Rich content, relevant sites
- Paid SM: FB, Instagram, Twitter

Owned

- SM content
- Website
- Recipe blog

Earned

- Customer SM posts
- PR: news story

Emerging Media Elements - Consumers as Medium

Listen

- Social listening strategy

Participate

- Create Instagram account
- Content marketing
- Create social media strategy and editorial calendar

Engage

- Respond to positive and negative comments
- Faster response time for private messages

	Tops	Wegmans
Facebook	79,538 likes	371,518 likes
Twitter	2,662 followers	189,000 followers
Pinterest	1,284 followers	13,589 followers
Instagram	n/a	11,800 followers

Emerging Media Elements - One:One - Data Acquisition

Monitor Purchasing Habits

- Track past purchases (Credit Card, Bonus Card)

Follow Marketplace Trends

- Popular diets and heavily shared food related articles in relation to targeted demographic
- Corporate social responsibility (Animal Welfare, Food Waste, Food Safety/Storage, Sustainability)

Online Monitoring

- Social listening - Scan for brand related keywords, hashtags, URLs, and other terms related to the brand or it's competitors (Hootsuite, Keyhole, Brandwatch)

Emerging Media Elements - One:One - Recommendations

- Personalized responses to reviews, tweets, mentions, and comments on social media anywhere the Tops brand or similar brands are being discussed



- App improvements - Online ordering system with ability to comment, rate and review products to improve individualized recommendations

Emerging Media Elements - One:One - Recommendations

Cross-reference credit card data to user-defined IP address data to improve targeted ads on social

- Sandwich targeted ads between non-relevant ads to avoid seeming creepy to our customers.
- Send targeted emails to existing shoppers that have not purchased in a while with targeted coupons, or relevant emails for special occasions based on Bonus Card data.

Tops brand packaging that tells a story

- Focus on source of ingredients and environmentally-friendly factory production

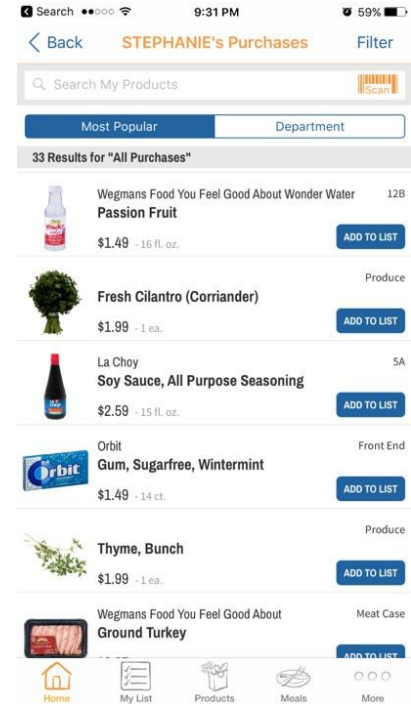
Add additional questions to Bonus Card application, or send surveys to existing customers, to allow for more targeted mailings to older offline shoppers

- (Birthday, Anniversary, Food Preferences)

Emerging Media Elements - Utility

Create an online ordering platform

- Ability to track purchases
- Improve targeted advertising
- Partnership with Instacart for delivery
- Competitors like Wegmans have already implemented this



Emerging Media Elements - Utility

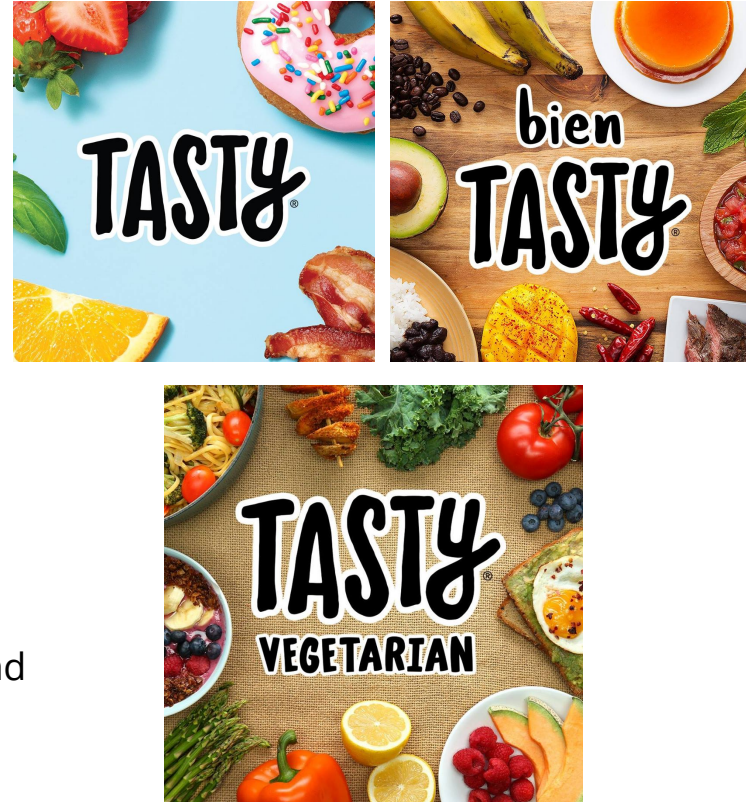
Implement an app feature that allows the customer to define their allergies and food restrictions

- Integrate with online ordering platform
- Filter unsafe foods for customers and their families
- Bar-code scanner that reads ingredients of the product linked to allergy indicator
 - Alert customers if food is safe with 1-click



Emerging Media Elements - Utility

- By 2017 video will account for 69% of all consumer internet traffic.
- Tasty is a cooking channel that has exploded on Facebook.
- Tasty on Facebook has close to 88 million followers
- Many variations (Proper Tasty, Tasty Junior, Bien Tasty) all with numbers of followers well into the millions
- Tops should be sponsoring videos on this platform, to have their products featured in the recipe videos
- Tops could create their own shareable recipe videos, but utilizing this enormous platform would be more effective and less time-consuming



Measurement

Google AdWords

- Impression share
- Keywords
- Website visits and conversions: online orders, app downloads
- Callout (offers) and price extensions

Social Media

- Likes, comments, shares
- Website engagement: Time spent, pages viewed per session

Email

- New subscribers
- CTR and open rate
- Conversions: online orders, app downloads

Brand

- Unique visitors to website
- New visitors
- Sales (online and in-store)
- Repeat transactions
- Social media followers

Questions?

Thanks!

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