

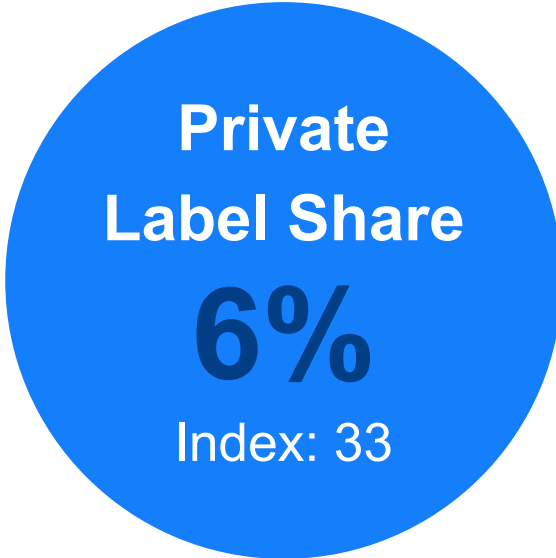
EVENT REVIEW

2020 Memorial Day Promotions

The events of 2020 have significantly changed the way that consumers are able to observe major holidays like Memorial Day, and consequently retailers have had to adjust their promotional strategies around key events to better support their customers and attract new ones. To see how Memorial Day general merchandise promotions may have shifted this year, we analyzed our Promotions Intel data for the two weeks preceding the holiday.

Memorial Day Circular Promotions

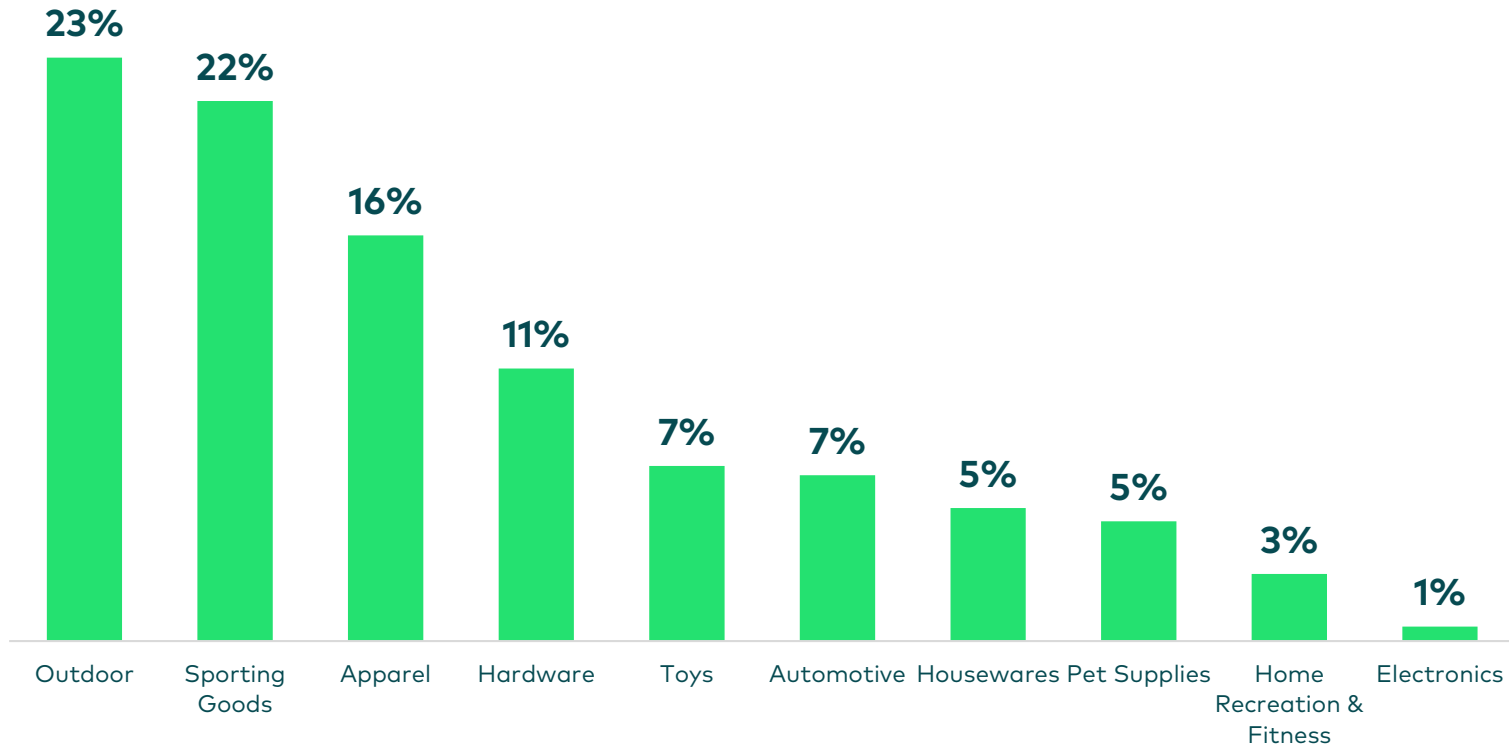
In advance of Memorial Day 2020, retailers promoted fewer products overall within their circulars than in 2019. The average discount across all categories was also lower in 2020, and private label circular promotions were significantly decreased this year.



Source: Numerator Promotions Intel, Weeks Ending 5/16/20 and 5/23/20. General Merchandise & Sporting Goods circular promotions across a representative set of Mass, Department, Club, Internet & Specialty Retailers

Top Promoted Categories, Circulars

These categories received the most circular promotional support in the two weeks preceding Memorial Day 2020.

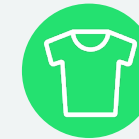


Index to 2019

106	253	65	72	165	163	37	183	522	103
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Source: Numerator Promotions Intel, Weeks Ending 5/16/20 and 5/23/20. General Merchandise & Sporting Goods circular promotions across a representative set of Mass, Department, Club, Internet & Specialty Retailers

Top 5 Categories, Memorial Day 2019



APPAREL

Share: 25%



OUTDOOR

Share: 15%



HARDWARE

Share: 15%



HOUSEWARES

Share: 15%



SPORTING GOODS

Share: 9%

Average Discount by Category

Electronics were discounted most heavily within Memorial Day circulars, followed distantly by Housewares & Sporting Goods.



ELECTRONICS

58%



HOUSEWARES

28%



SPORTING GOODS

26%



APPAREL

24%



OUTDOOR

21%



TOYS & GAMES

20%



HARDWARE

20%



AUTOMOTIVE

20%



PET SUPPLIES

16%

Source: Numerator Promotions Intel, Weeks Ending 5/16/20 and 5/23/20. General Merchandise & Sporting Goods circular promotions across a representative set of Mass, Department, Club, Internet & Specialty Retailers

Category Snapshot: Outdoor

Within the Outdoor category, items geared towards spending down time at home in the backyard, such as outdoor furniture and grills, were promoted most.

Top Promoted Subcategories

SUB-CATEGORY	SHARE
Outdoor Furniture	21.4%
Barbeque Grills & Accessories	14.0%
Outdoor Power Equipment	13.3%
Fertilizers & Chemicals	9.9%
Bird Feeders & Food	9.5%
Landscaping Equipment & Supplies	7.2%
Hoses, Sprinklers & Accessories	4.7%
Coolers/Jugs & Accessories	3.4%
Pool/Spa Accessories & Chemicals	2.9%
Charcoal & Grilling Consumables	2.7%

Top Promoted Brands

BRAND	SHARE
Backyard Creations	6.8%
Kaytee	4.5%
Scotts	2.9%
Char-Broil	2.3%
Miracle-Gro	2.3%
Weber	2.3%
Kingsford	2.0%
Gilmour	1.8%
Perky Pet	1.8%
Traeger	1.8%

Category Snapshot: Sporting Goods

Non-team sports were the focus of promotions within Sporting Goods, with Fishing and Firearms & Hunting taking the top two promoted subcategory spots.

Top Promoted Subcategories

SUB-CATEGORY	SHARE
Fishing	21.7%
Firearms & Hunting	20.0%
Water Sports	10.2%
Tents	5.1%
Camping Accessories	4.4%
Air Beds/Cots	3.2%
Bicycles	2.9%
Optical Goods	2.4%
Furniture	2.2%
Sleeping Bags	2.2%

Top Promoted Brands

BRAND	SHARE
Coleman	2.4%
Leupold	2.2%
Rapala	2.2%
Ruger	1.7%
Triumph Sports	1.7%
Daiwa	1.5%
Northland Fishing	1.5%
Plano	1.5%
Vortex Optics	1.5%
Winchester	1.5%

Category Snapshot: Hardware

Paint & Home Decorating was the top promoted subcategory within Hardware, with Masterforce taking the top promoted brand.

Top Promoted Subcategories

SUB-CATEGORY	SHARE
Paint & Home Decorating	17.9%
Electrical Accessories	11.6%
Plumbing/Heating/Home Improvement	11.6%
Power Tools & Accessories	10.6%
Hand Tools & Accessories	9.2%
Fans	4.8%
Pressure Washers	4.8%
Batteries	3.4%
Flashlights	3.4%
Fasteners, Nails, Nuts, Bolts, Screws	2.9%

Top Promoted Brands

BRAND	SHARE
Masterforce	14.0%
DeWalt	4.8%
Southwire	4.8%
Thompson's	3.9%
T-Rex	2.9%
First Alert	2.9%
Woods	2.9%
Cabot	2.4%
Energizer Max	2.4%
Milwaukee	2.4%
Rust-Oleum	2.4%

Category Snapshot: Apparel

Men's Athletic Shoes were the top promoted subcategory within apparel in 2020 - replacing Kid's Casual Apparel, which dropped from 12.7% of Memorial Day apparel promotions in 2019 to only 4.2% in 2020.

Top Promoted Subcategories

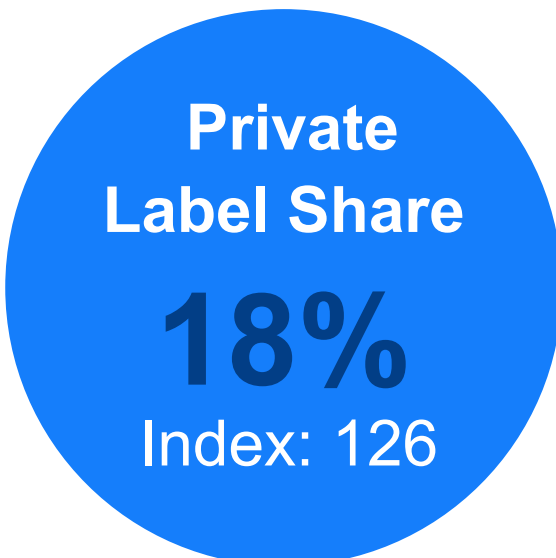
SUB-CATEGORY	SHARE
Men's Athletic Shoes	8.1%
Men's Casual Shirts	8.1%
Women's Casual Apparel	7.1%
Kids' Casual Shoes	6.8%
Kids' Sports Apparel	6.8%
Kids' Athletic Shoes	6.5%
Men's Casual Shoes	6.2%
Men's Sports Apparel	6.2%
Women's Athletic Shoes	5.8%
Women's Casual Shoes	5.8%

Top Promoted Brands

BRAND	SHARE
Nike	16.2%
Adidas	7.8%
Under Armour	7.8%
Crocs	5.8%
Champion Apparel	2.3%
Coleman Footwear	1.6%
Berne	1.3%
Body Glove	1.3%
Field N' Forest	1.3%
Free Country	1.3%

Memorial Day Web & Email Promotions

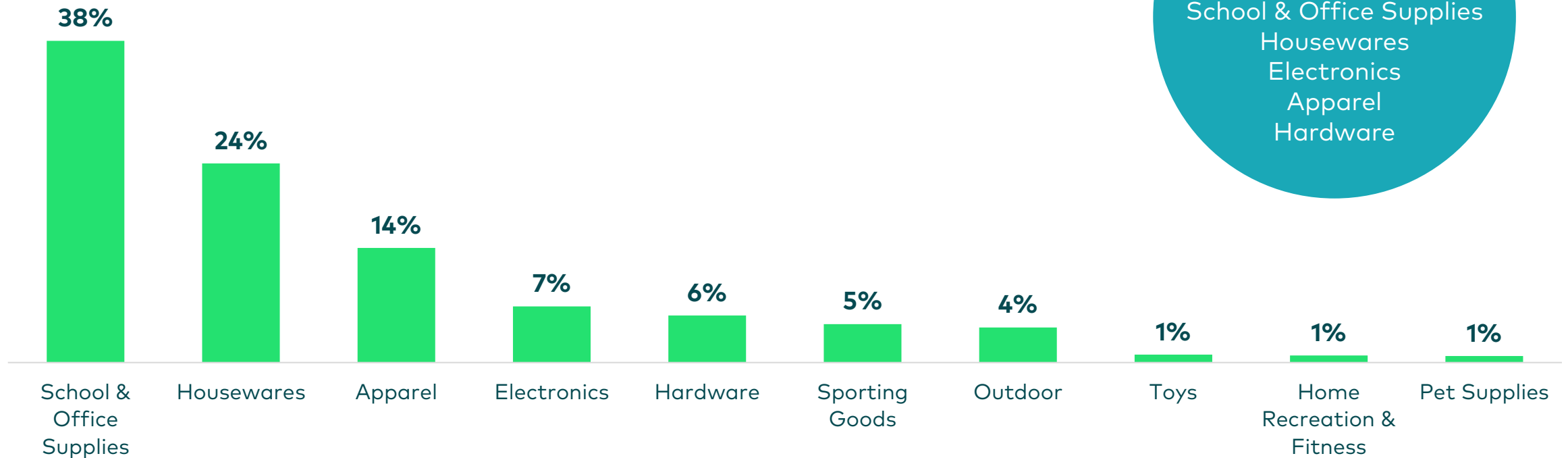
Email & web discounts overall were not as deep in 2020 when compared with 2019. However, total number of promoted products and private label share of promotions both increased significantly in 2020.



Source: Numerator Promotions Intel, Weeks Ending 5/16/20 and 5/23/20. General Merchandise & Sporting Goods circular promotions across a representative set of Mass, Department, Club, Internet & Specialty Retailers

Top Promoted Categories, Web & Email Promotions

These categories were featured most in web & email promotions during the two weeks leading into Memorial Day 2020.



Top 5 Categories Memorial Day 2019

- School & Office Supplies
- Housewares
- Electronics
- Apparel
- Hardware

Index to 2019

139	102	142	43	73	163	56	42	68	42
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Source: Numerator Promotions Intel, Weeks Ending 5/16/20 and 5/23/20. General Merchandise & Sporting Goods circular promotions across a representative set of Mass, Department, Club, Internet & Specialty Retailers

Average Discount by Category, Web & Email Promotions

Electronics saw the deepest discounts in web & email promotions, followed closely by Hardware.



ELECTRONICS

32%



HARDWARE

30%



HOUSEWARES

29%



OUTDOOR

29%



APPAREL

26%



SCHOOL/OFFICE
SUPPLIES

26%



SPORTING GOODS

25%



HOME RECREATION
& FITNESS

25%



CRAFTS

26%



TOYS

20%

Source: Numerator Promotions Intel, Weeks Ending 5/16/20 and 5/23/20. General Merchandise & Sporting Goods circular promotions across a representative set of Mass, Department, Club, Internet & Specialty Retailers

Summary

1

This year retailers promoted significantly fewer products in advance of Memorial Day via circulars, but increased web & email promotions.

2

Circular promotions shifted away from Apparel and Housewares towards categories more geared towards spending time outside at home, like the Outdoor and Sporting Goods categories.

3

The average discount across categories was lower for all media types in 2020 compared to 2019.



Numerator

For a more in-depth analysis of
Memorial Day promotions in your
category, reach out to us at

hello@numerator.com