



Holiday Guide 2019

From Black Friday through December, the holiday season is a flurry of shopping activity — gift buying, deal searching, and increased spending. To win this key retail season, it's crucial to have a thorough understanding of your consumer and what drives their holiday purchasing decisions.

Read on for insights such as:



Holiday Sales Share by Day



Top Gifting Categories and Products



Key Days for Holiday Shopping



Average Depth of Discount



Top Retailers of the Holidays





And more!

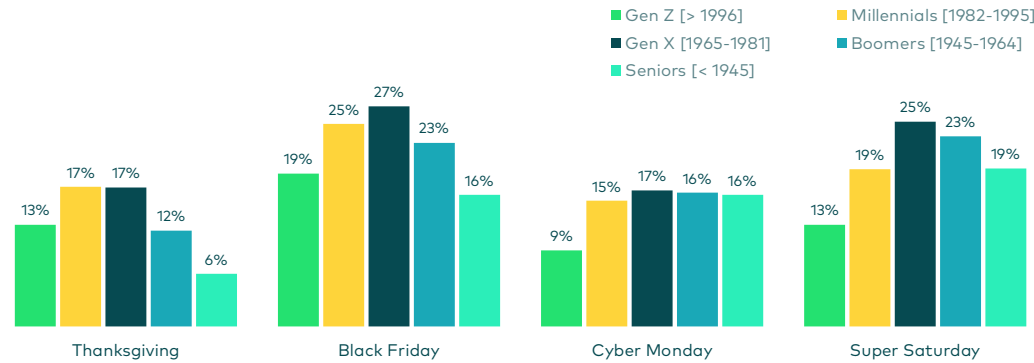


2018 Holiday Sales Share by Day

Sales of key gift sectors: Apparel, Books, Electronics, Entertainment, Party & Occasions, Sports and Toys

| Sunday | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday |
|--|----------------------------|---|---|----------------------------|----------------------------|------------------------------|
|  | | | | 22 6.0% Thanksgiving | 23 7.1% Black Friday | 24 3.1% |
| 25 2.3% | 26 3.5% Cyber Monday | 27 2.1% | 28 1.8% | 29 2.0% | 30 2.6% | 1 3.1% DEC |
| 2 3.5% | 3 2.3% | 4 2.3% | 5 2.4% | 6 2.1% | 7 2.8% | 8 3.2% |
| 9 2.6% | 10 2.5% | 11 2.6% | 12 2.5% | 13 2.5% | 14 3.1% | 15 3.7% |
| 16 3.1% | 17 3.1% | 18 2.8% | 19 3.0% | 20 3.1% | 21 3.5% | 22 3.8% Super Saturday |
| 23 3.2% | 24 2.6% | 25  | The Party & Occasions sector (primarily comprised of gift cards) spiked on Sunday, December 2 nd and steadily increased to become the #1 sector the week leading up to Christmas. Last minute gift cards, anyone? | | | |

When do different generations do their holiday shopping?



Source: Numerator Insights 11/22/18 – 12/25/18, Numerator Survey

Most consumers surveyed said they planned to shop more online during Thanksgiving weekend and less in store (2018).



Source: Numerator Survey; Consumers who made a purchase Thanksgiving Weekend, n=9863



Key Days for Holiday Shopping

22% of holiday spend occurred between Thanksgiving and Cyber Monday!

BLACK
FRIDAY

Top Retailers

- 1. Walmart
- 2. amazon
- 3. TARGET



7.1% of
Holiday Spend

CYBER
MONDAY

Top Retailers

- 1. amazon
- 2. Walmart
- 3. BEST BUY



3.5% of
Holiday Spend

SUPER
SATURDAY

Top Retailers

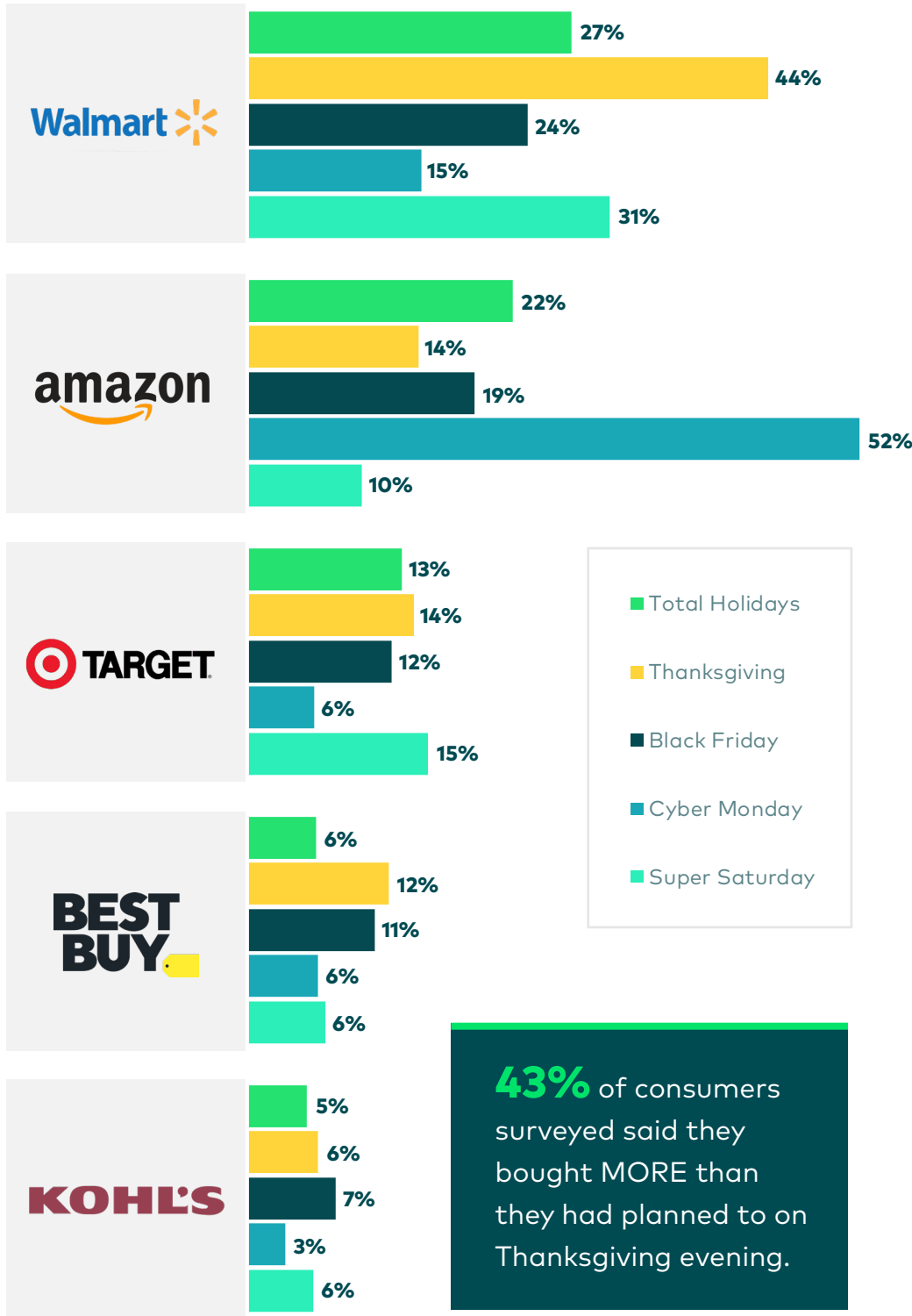
- 1. Walmart
- 2. TARGET
- 3. amazon



3.8% of
Holiday Spend

Top Retailers by Share of Wallet

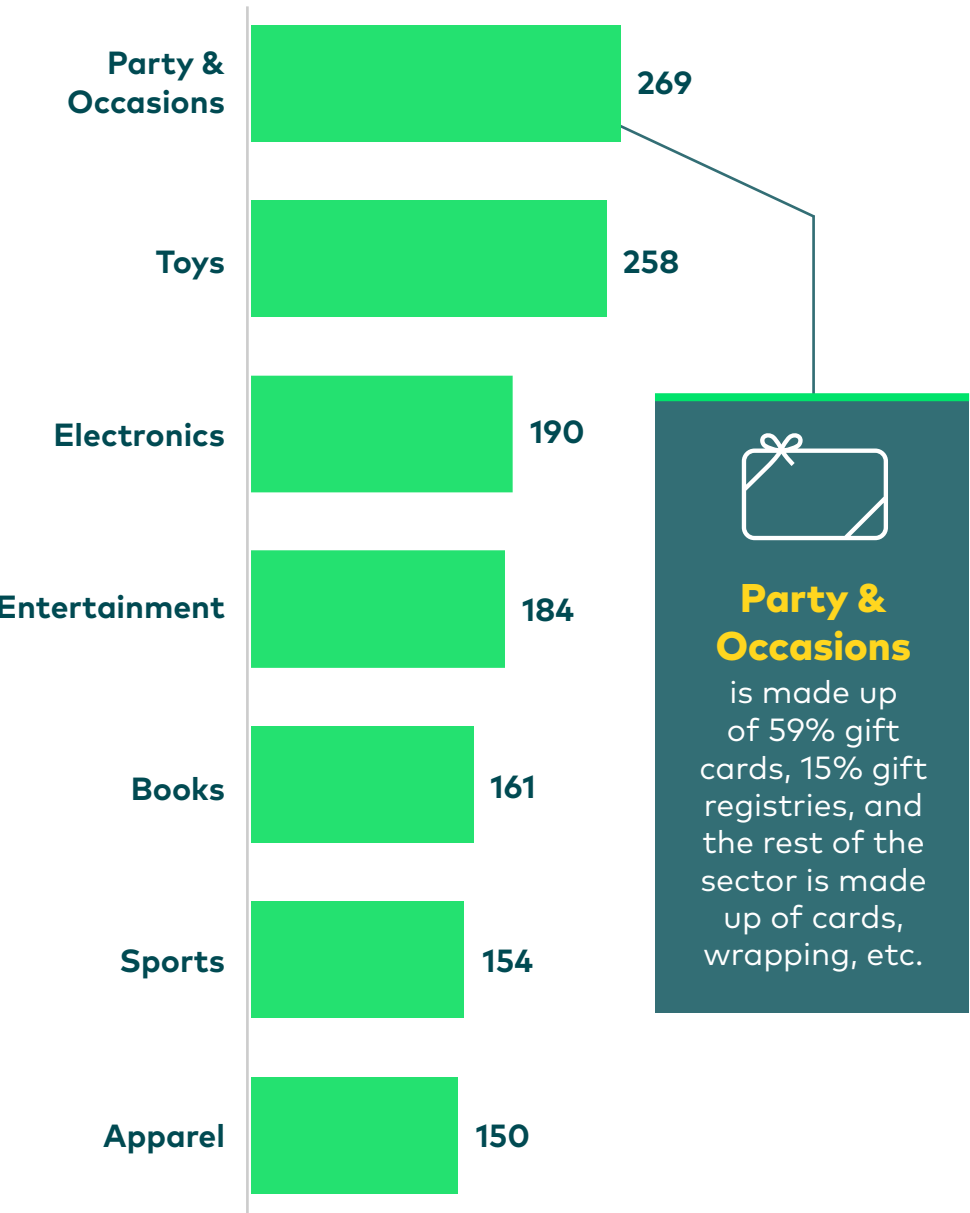
When it came to winning the 2018 holiday season overall, Walmart led the pack, boosted by a strong performance on Black Friday. But as expected, Amazon had the resounding lead on Cyber Monday. Will 2019 be the year that Amazon overtakes Walmart?



Top Holiday Gift Sectors

Tis the season for gift giving! As expected, sectors like Toys and Electronics get a major bump in the holiday season, but Party & Occasions is the real standout when compared to the rest of the year.

Holiday Sales Index Versus Average Period



Sales in these sectors were **1.5 to 2.7x higher** during the holidays than other times of the year.

Source: Numerator Insights; 11/22/18 – 12/25/18; Indexed vs. Average period of equal length

Share of Holiday Print Promotions

Top 10 Holiday Gifting Categories by Share of Print Promotions

| | |
|-------------------------|-----|
| Apparel | 23% |
| Jewelry | 16% |
| Toys & Games | 12% |
| Housewares | 12% |
| Computers & Electronics | 9% |
| Small Appliances | 7% |
| Entertainment | 6% |
| Sporting Goods | 4% |
| Footwear | 4% |
| Major Appliances | 4% |

55% of shoppers surveyed use print circulars to find deals on non-grocery items, when planning their store trip.

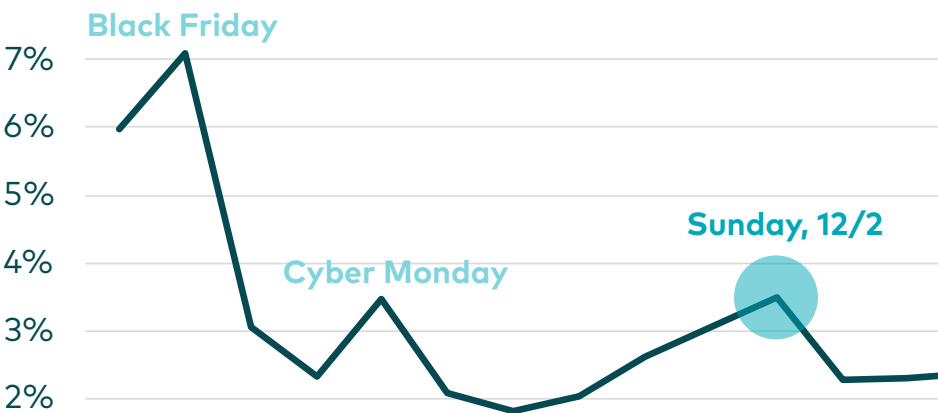


Source: Numerator Promotions; 11/18/18 – 12/29/18; Retailers: Bass Pro Shops, Best Buy, Cabela's, Dick's, Home Depot, JC Penney, Kmart, Kohl's, Lowes, Macys, Meijer, Office Depot, Sears, Staples, Target and Walmart; Numerator Survey

Holiday Sales Spikes Driven by Promotions

2018 Holiday Sales by Day

Key Holiday Gift Sectors



Target's share of wallet (37%) on Sunday 12/2 was **2.9x higher** than Target's overall share of wallet through the entire holiday season (13%).

15% OF HOUSEHOLDS BUY LAST MINUTE GIFT CARDS (IN THE FINAL WEEK LEADING UP TO CHRISTMAS)

THESE SHOPPERS ARE MORE LIKELY TO BE:



Gen X



White/
Caucasian



High
Income

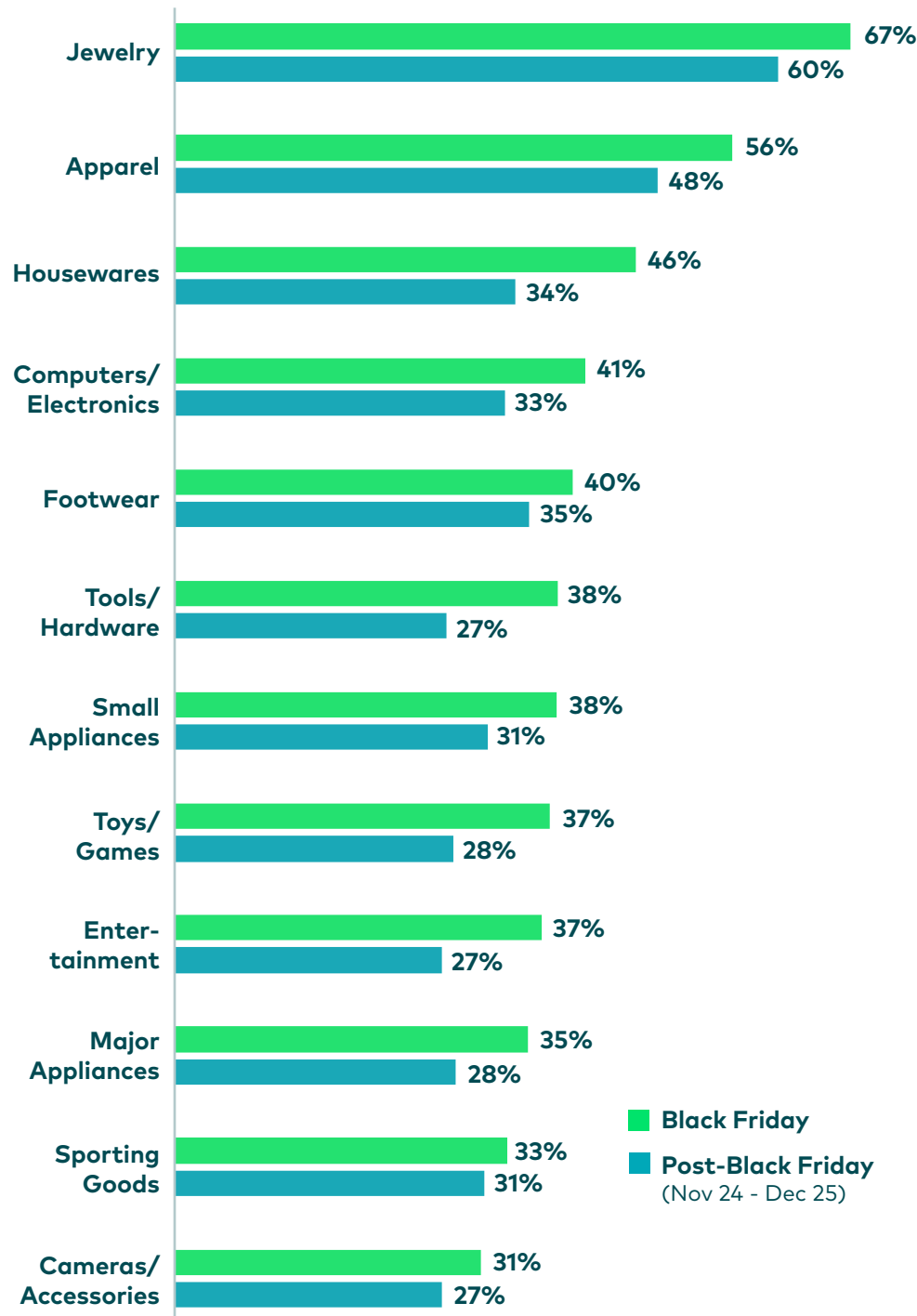


Parents of
Children 13-17

Average Depth of Discount

In 2018, Black Friday still reigned supreme in terms of discounts. Despite having an extra week between Thanksgiving and Christmas in 2018 to drive additional sales, retailers still focused their deepest discounts on Black Friday across almost all popular gifting categories, cameras being the only exception.

Black Friday Versus Post-Black Friday, by Category

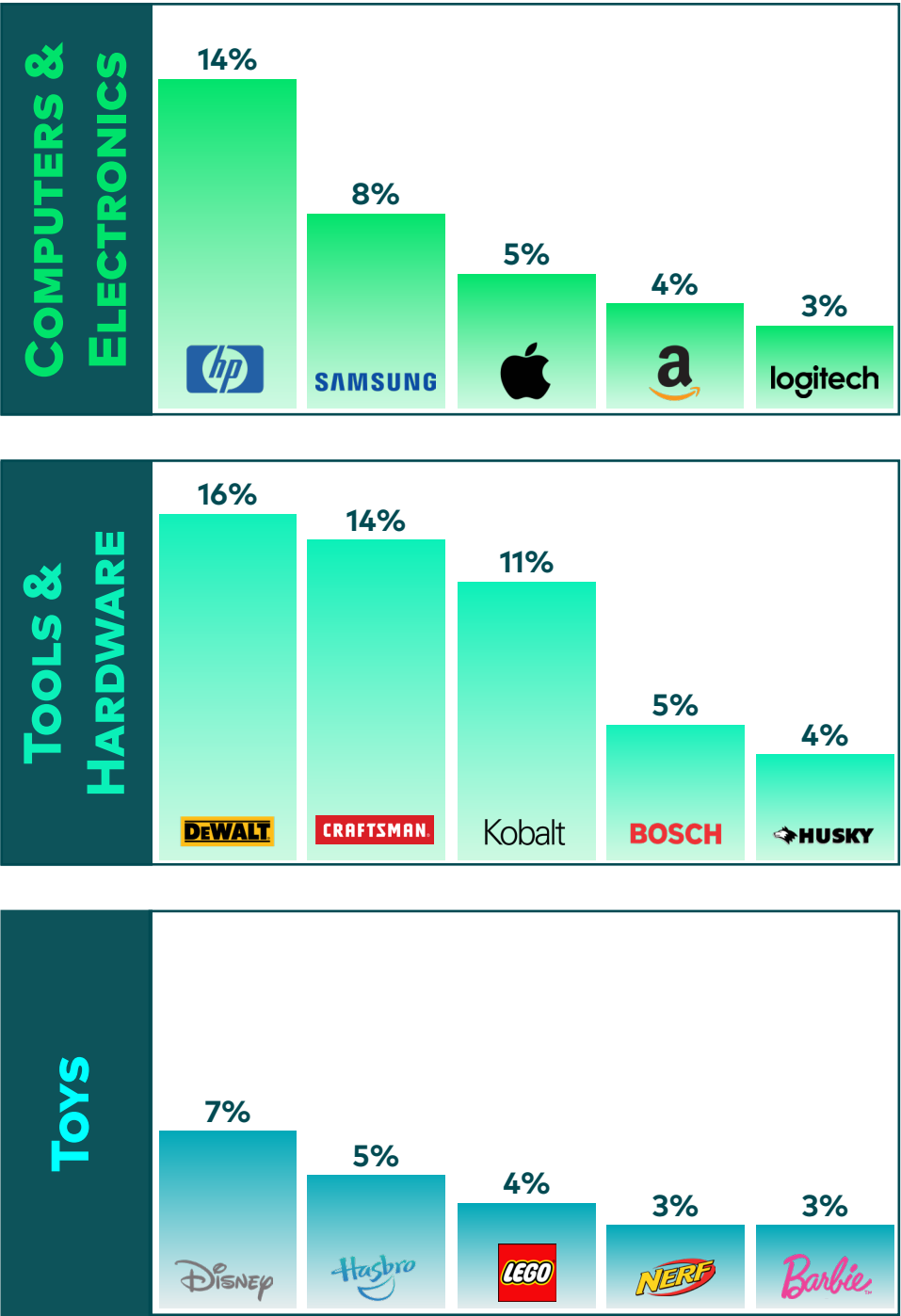


Source: Numerator Promotions 11/18/18 – 12/29/18; Retailers: Best Buy, Dick's, Home Depot, JC Penney, Kohl's, Lowes, Macys, Meijer, Office Depot, Staples, Target and Walmart



Top Promoted Brands in Key Gifting Categories

Top 5 Brands by Share of Promotions, Holiday 2018



Source: Numerator Promotions; 11/18/18 – 12/29/18; Retailers: Best Buy, Dick's, Home Depot, JC Penney, Kohl's, Lowes, Macys, Meijer, Office Depot, Staples, Target and Walmart

Top Sellers During Black Friday and Cyber Monday

| Top 5 Sellers by Retailer | | BLACK FRIDAY |
|---|--|------------------|
| By Dollar Sales | | |
| TCL 65" Class 4K HDR Roku Smart LED TV | | Walmart |
| Apple iPad with Wi-Fi - 32GB - Space Gray | | TARGET |
| Samsung 55" Class LED Smart 4K UDH TV | | BEST BUY |
| Bamboo-Polyfill Pillows - Jumbo 2-Pack | | Sam's Club |
| Bose On-Ear Bluetooth Headphones - Black | | COSTCO WHOLESALE |

| Top 5 Online Sellers by Retailer | | CYBER MONDAY |
|---|--|--------------|
| By Dollar Sales | | |
| Echo Dot 3rd Gen - Smart Speaker w/ Alexa | | amazon |
| Apple iPod 32GB with Wi-Fi | | Walmart |
| Nintendo Switch Joy-Con L/R | | TARGET |
| Apple Macbook Air 13.3" 8GB - Silver | | BEST BUY |
| The Big One Microfiber Pillow | | KOHL'S |

| Top 5 Sellers: Walmart Black Friday | | Average Price |
|---|--|---------------|
| by Unit Sales | | |
| Dickies Dk-P5 Dritech Crew Socks | | \$4.00 |
| Rubbermaid Food Storage 38 Pc Set | | \$8.65 |
| Rubbermaid 50 Pc Takelong Set | | \$6.94 |
| Elite Gel Pillow | | \$6.90 |
| Onn 3ft. Sync & Charge Cable with Lightning | | \$2.97 |

Source: Numerator Promotions 11/18/18 – 12/29/18; Retailers: Best Buy, Dick's, Home Depot, JC Penney, Kohl's, Lowes, Macys, Meijer, Office Depot, Staples, Target and Walmart





Holiday Guide 2019

This guide is just a taste of what you can learn with the power of Numerator insights. Let's dive deep into your category or brand to help answer questions like:

When do shoppers of my category start planning for the holidays?

What's influencing my shoppers' decisions?

How do peoples' attitudes or media consumption habits translate to holiday spending?

What do trip circuits look like for specific banners or items?

How do pricing and discounts for my product compare to my category overall? To my top competitors?

Do shoppers plan to look for my items online or in-store? Which retailers?

What is the impact of Black Friday and Cyber Monday on my brand or category?

Is my brand attracting new shoppers during the holiday season?

Give us a jingle to see how you can
win the holiday season!