



PROMOTIONS REVIEW

# 2021 Black Friday



# What's Included:

## NUMERATOR PROMOTIONS INTEL

- **Time Period:** 2 weeks ending November 27, 2021
- **Departments:** General Merchandise; Sporting Goods; Cosmetics, Fragrance & Bath
- **Media:** Weekly Circular, Email and Web promotions
- **Market:** Representative
- **Channels:** Club, Department, Electronics, Hardware, Office, Mass, Specialty, Sporting Goods

# Black Friday 2021 Overview

Total promotions in the two weeks preceding Black Friday 2021 were down overall vs 2020. Additionally, discounts were not as deep– the average discount across all categories was only 34% this year, compared to 42% in 2020.

# 81

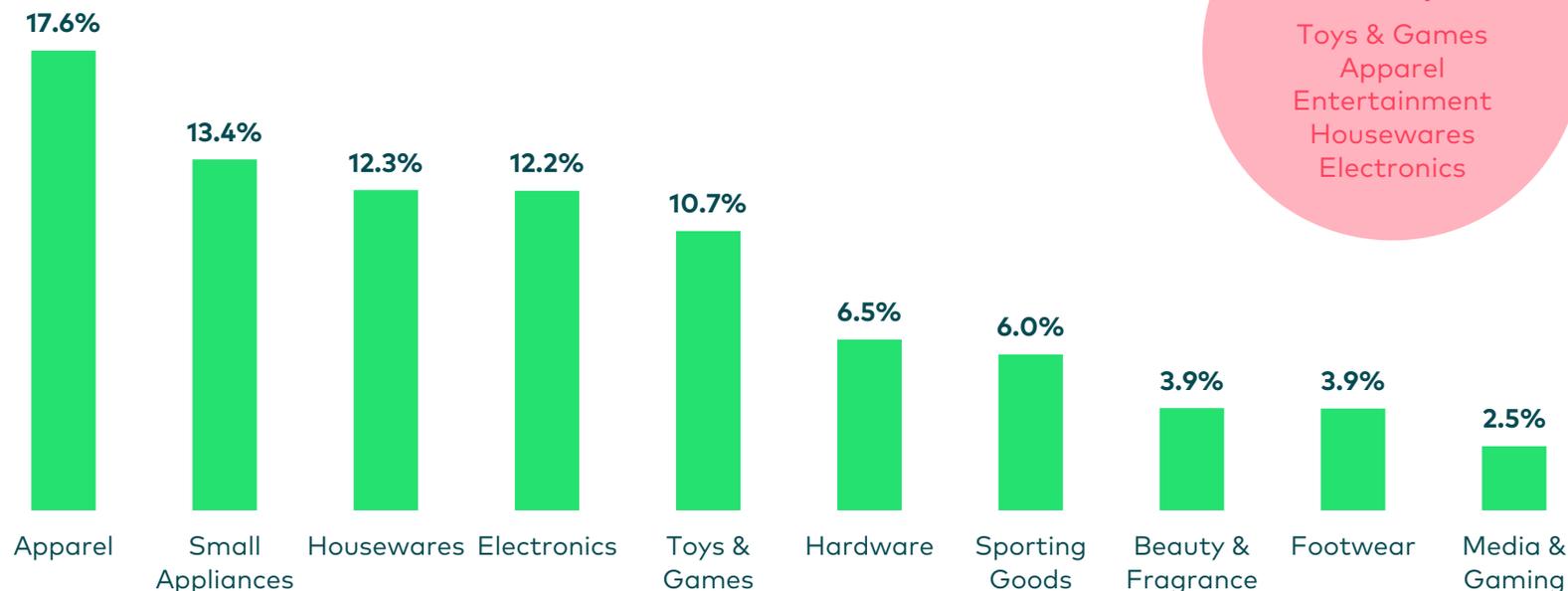
**Index of Total Promotions**  
vs Black Friday 2020

# 34%

**Total Average Discount**  
vs Black Friday 2020

## Top 2021 Black Friday Categories

By share of promotions



# Average Discount by Category

Discounts ranged anywhere between 5% and 80% for Black Friday 2021. Apparel saw the strongest discounts this year, with Housewares coming in second.



Apparel

41%



Beauty & Fragrance

34%



Electronics

33%



Footwear

29%



Home Improvement

30%



Housewares

38%



Media & Gaming

33%



Small Appliances

37%



Sporting Goods

31%



Toys & Games

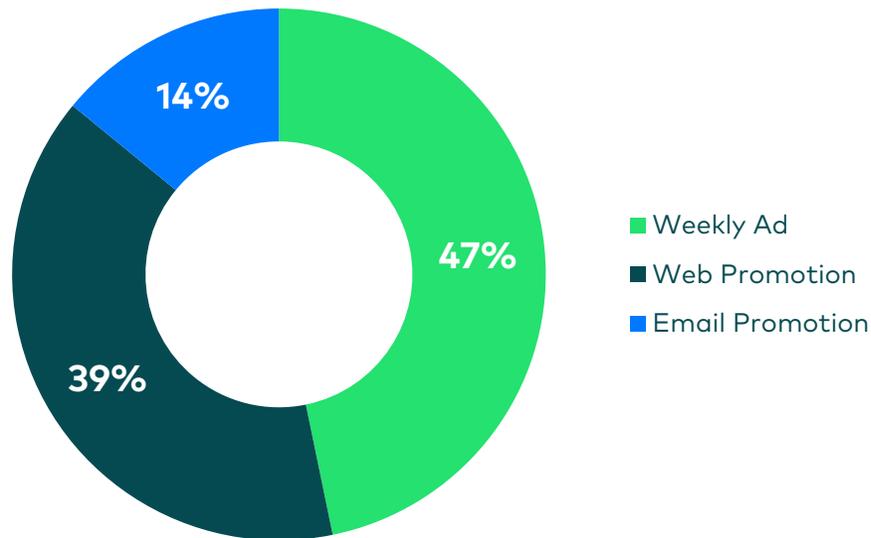
31%



# Retailers put more emphasis on weekly ad promotions in 2021

Weekly ad promotions gained share of total Black Friday promotions in 2021. Website share of promotions also increased, though only slightly, while email promotions lost share vs. 2020.

## Media Share of Black Friday 2021 Promotions



## Media Share Index vs YA

Media Share of 2021 Black Friday Promotions vs. 2020



Source: Numerator Promotions Intel; General Merchandise, Sporting Goods, Beauty & Fragrance circular, web & email promotions, 11/14/2021 – 11/27/2021

## CATEGORY SNAPSHOT:

# Electronics



Within the Electronics category, the Televisions subcategory saw the most promotional support during Black Friday 2021, while Samsung took the top spot for brand share of Electronics promotions.

### Top Subcategories

| SUBCATEGORY                 | SHARE |
|-----------------------------|-------|
| Televisions                 | 12.5% |
| Headphones                  | 9.6%  |
| Laptops/Notebooks           | 7.9%  |
| Mobile Phones               | 5.1%  |
| Speakers                    | 4.9%  |
| Mobile Phone Accessories    | 4.3%  |
| TV&Video Accessories        | 4.1%  |
| Security Cameras & Monitors | 3.9%  |
| Smart Watches               | 3.2%  |
| Tablets                     | 3.0%  |

### Top Brands

| BRAND                | SHARE |
|----------------------|-------|
| Samsung              | 11.7% |
| Apple                | 7.9%  |
| Amazon               | 4.7%  |
| Google               | 3.3%  |
| LG                   | 3.0%  |
| Sony                 | 2.6%  |
| HP (Hewlett Packard) | 2.6%  |
| Fitbit               | 1.8%  |
| Lenovo               | 1.5%  |
| Bose                 | 1.3%  |

Source: Numerator Promotions Intel; Electronics Promotions ,11/14/2021 – 11/27/2021

## CATEGORY SNAPSHOT:

# Toys & Games



Playsets was the most promoted Toys & Games subcategory for Black Friday 2021. Melissa & Doug had the highest brand share, replacing LEGO who held the top spot from 2020.

### Top Subcategories

| SUBCATEGORY                  | SHARE |
|------------------------------|-------|
| Playsets                     | 7.0%  |
| Crafts & Activities          | 5.7%  |
| Cars/Trucks/Vehicles         | 5.7%  |
| Action & Skill               | 5.2%  |
| Remote/Radio Control         | 5.0%  |
| Dolls                        | 4.9%  |
| Board/Card Games             | 4.9%  |
| Action Figures & Accessories | 4.8%  |
| Role Play                    | 4.6%  |
| Plush                        | 4.5%  |

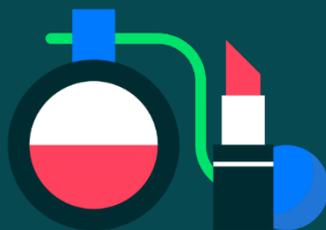
### Top Brands

| BRAND          | SHARE |
|----------------|-------|
| Melissa & Doug | 8.0%  |
| Fisher-Price   | 6.3%  |
| Barbie         | 3.3%  |
| LEGO           | 2.9%  |
| Hot Wheels     | 2.6%  |
| VTech          | 2.4%  |
| Spin Master    | 1.7%  |
| Star Wars      | 1.3%  |
| Discovery Kids | 1.1%  |
| My Little Pony | 1.1%  |

Source: Numerator Promotions Intel; Toys & Games Promotions ,11/14/2021 – 11/27/2021

## CATEGORY SNAPSHOT:

# Beauty & Fragrance



Eye Make-Up and Face Make-Up held the top two spots for most promoted Beauty & Fragrance subcategories. Among brands, L'Oreal received the most promotional support during Black Friday 2021.

### Top Subcategories

| SUBCATEGORY                   | SHARE |
|-------------------------------|-------|
| Eye Make-Up                   | 11.5% |
| Face Make-Up                  | 10.3% |
| Cosmetic Gift Sets            | 8.7%  |
| Lip Make-Up                   | 8.6%  |
| Fragrances                    | 6.7%  |
| Makeup Removers               | 6.2%  |
| Specialty Bath & Lotion Items | 6.2%  |
| Nail Color                    | 5.2%  |
| Cosmetic Brushes/Tools        | 4.5%  |
| Fragrance Gift Sets           | 3.7%  |

### Top Brands

| BRAND        | SHARE |
|--------------|-------|
| L'Oréal      | 7.6%  |
| Burt's Bees  | 4.8%  |
| Clinique     | 4.8%  |
| CoverGirl    | 3.9%  |
| Lancome      | 3.3%  |
| Estee Lauder | 2.9%  |
| Ulta Beauty  | 2.9%  |
| Maybelline   | 2.7%  |
| Neutrogena   | 2.1%  |
| Studio M     | 1.8%  |

Source: Numerator Promotions Intel; Beauty & Fragrance Promotions ,11/14/2021 – 11/27/2021

## CATEGORY SNAPSHOT:

# Small Appliances



Deep Fryers (inclusive of air fryers) was the most promoted small appliance subcategory for Black Friday 2021, while Black & Decker had the highest brand share of small appliance promotions.

### Top Subcategories

| SUBCATEGORY                | SHARE |
|----------------------------|-------|
| Deep Fryers                | 6.0%  |
| Coffee Makers              | 3.8%  |
| Vacuums-Robotic Floor Care | 3.5%  |
| Microwaves                 | 3.0%  |
| Vacuums-Uprights           | 2.7%  |
| Countertop Blenders        | 2.6%  |
| Electric Dental Cleaning   | 2.6%  |
| Toaster Ovens              | 2.5%  |
| Vacuums-Sticks             | 2.5%  |
| Slow Cookers               | 2.2%  |

### Top Brands

| BRAND          | SHARE |
|----------------|-------|
| Ninja          | 3.5%  |
| KitchenAid     | 3.3%  |
| Cuisinart      | 3.2%  |
| Hamilton Beach | 3.2%  |
| Black & Decker | 2.9%  |
| Oster          | 2.9%  |
| Shark          | 2.9%  |
| Bissell        | 2.3%  |
| Presto         | 1.7%  |
| Bella          | 1.4%  |



# There's **More to Know.**

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