

JUNE 2022 UPDATE

## EMAIL INTELLIGENCE UNCOVERS RECORD NUMBER OF PROMOTIONAL OUTLIERS

Greg Robin

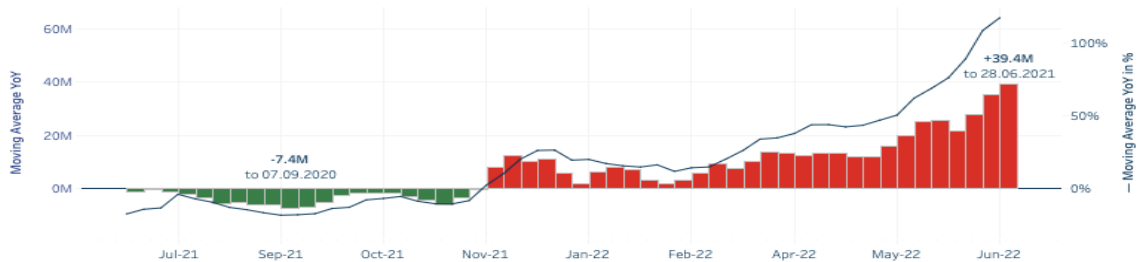
Random Walk Email Intelligence has never identified more unusual promotional activity than over the past 30 days. In June alone our systems have captured nearly 100 never seen before campaigns as consumer preferences shift.

### HOME FURNISHING PROMOTIONS ACCELERATE TO NEW HIGHS BIG, LOVE, W, WSM

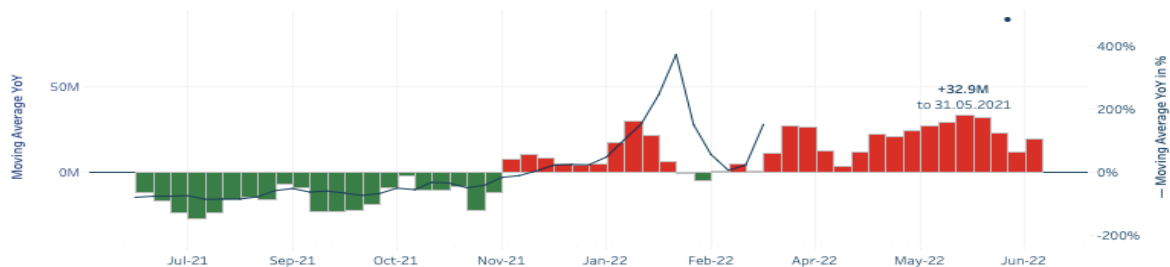
In home furnishings our data indicates COVID pulled forward, not just several quarters but year’s worth of demand. Now, with the backyard, garage space and wallets maxed out, consumers are shifting away from creating the perfect Instagram worthy at-home backyard oasis.

Random Walk Email Intelligence indicates record growth the discount campaigns in Q2 from Pottery Barn.

**Pottery Barn (WSM): Total Volume promotional emails**  
2-week moving average YoY, 7/5/2021 - 7/3/2022



**Pottery Barn (WSM): Significant promotional emails**  
2-week moving average YoY, 7/5/2021 - 7/3/2022



DEMAND FOR CASUAL 'AT HOME' FOOTWEAR FADING?  
CROX, FL, SCVL

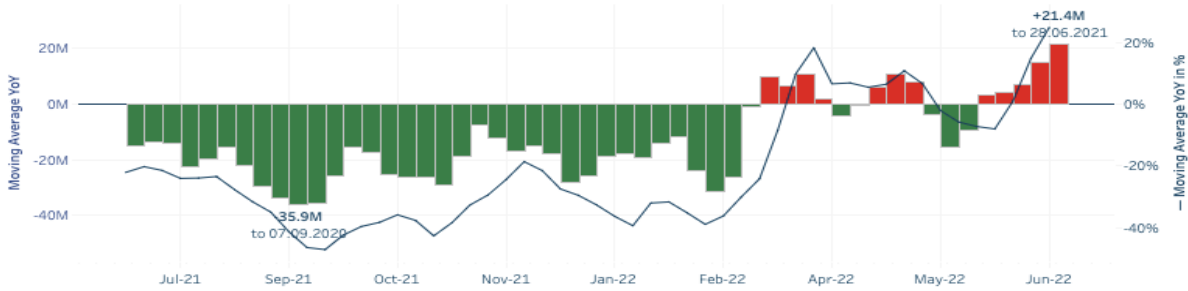
During COVID, Americans gobbled up footwear for the outdoors or comfort around the house casual footwear retailers benefitted and throttled back promotions. However, this summer with consumers more spartan due to gas prices and \$20 hamburgers they don't appear to need so many sandals.

Crocs and Crocs retailers such as Foot Locker and Shoe Carnival have been blasting an all-time high volume of Croc's specific discounts.

**Crocs (CROX): Total Volume promotional emails**  
2-week moving average YoY, 7/5/2021 - 7/3/2022



**Shoe Carnival (SCVL): Total Volume promotional emails**  
2-week moving average YoY, 7/5/2021 - 7/3/2022



**Foot Locker (FL): Significant promotional emails**  
2-week moving average YoY, 7/5/2021 - 7/3/2022



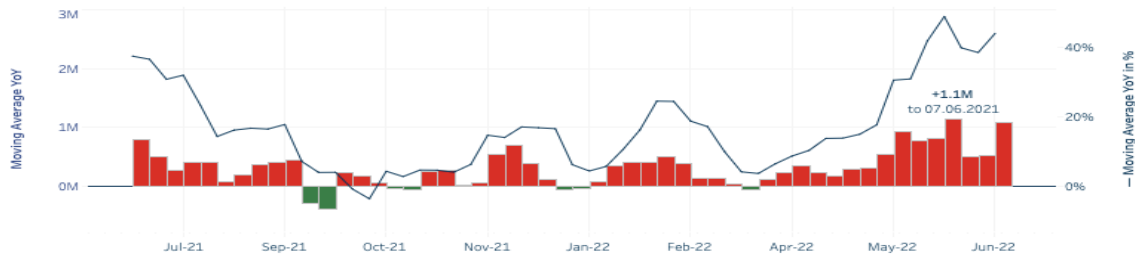
GET OUTDOORS ON THE ROAD MEETS \$6 GAS

## CWH, WGO, YETI

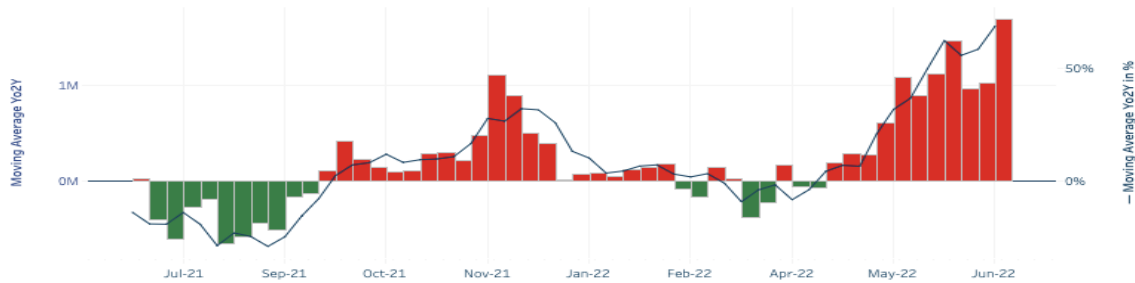
Without COVID checks, a free pass from work, and with \$6 gas it appears road trip RV, van and mega SUV trips could be stalling. Our email intelligence has tracked growth in promotional volumes for outdoor camping accessory related businesses such as Camping World, Winnebago, and Yeti.

Into summer camping season Camping World has blasted out an all-time high volume of significant and steep discounts.

**Camping World (CWH): Total Volume promotional emails**  
2-week moving average YoY, 7/5/2021 - 7/3/2022



YO2Y



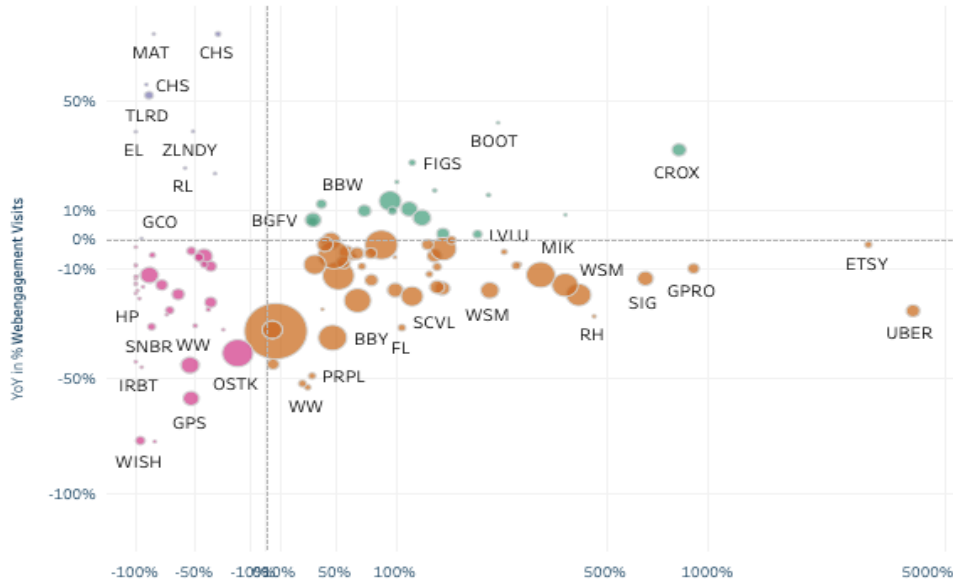
**Yeti (YETI): Total Volume promotional emails**  
2-week moving average YoY, 8/3/2020 - 7/3/2022



Our data visualizations allow quick identification of outliers within a specific sector. Find out which brands are losing organic demand and responding with increased “push” discounting campaigns to their leads.

### Outlier Analysis Promotional Activity

2W MA YoY Change in % >= +/-30% | Bubbles sized by Significant Promotional Emails



#### Outlier Analysis Promotional Activity: Sector: retail

Most Increased/decreased 15 by Significant Promotional Emails  
Ranking based of 2-week moving average YoY in %

	YoY (%)	Past 10w (Y..)	Total Volume
RISING PROMOTIONAL EMAIL VOLUMES	Postmates (UBER)	↗ 3994.2%	31.3M PY: 0.8M   YoY: +30.5M
	Etsy (ETSY)	↗ 2951.3%	8.3M PY: 0.3M   YoY: +8.0M
	GoPro (GPRO)	↗ 901.3%	21.1M PY: 2.1M   YoY: +19.0M
	Crocs (CROX)	↗ 816.2%	34.1M PY: 3.7M   YoY: +30.4M
	Zales (SIG)	↗ 648.7%	43.5M PY: 5.8M   YoY: +37.7M
	Restoration Hardware (RH)	↗ 455.8%	2.4M PY: 0.4M   YoY: +2.0M
	West Elm (WSM)	↗ 409.4%	108.1M PY: 21.2M   YoY: +86.9M
	North Face (VFC)	↗ 373.1%	0.5M PY: 0.1M   YoY: +0.4M
	Walmart (WMT)	↗ 372.2%	120.4M PY: 25.5M   YoY: +94.9M
	Michaels (MIK)	↗ 313.4%	146.1M PY: 35.3M   YoY: +110.7M
	Blue Apron (APRN)	↗ 269.1%	3.1M PY: 0.8M   YoY: +2.2M
	1-800-Flowers (FLWS)	↗ 263.0%	12.4M PY: 3.4M   YoY: +9.0M
	Camping World (CWH)	↗ 240.9%	5.8M PY: 1.7M   YoY: +4.1M
	Sheplers (BOOT)	↗ 230.4%	1.2M PY: 0.4M   YoY: +0.8M
	Pottery Barn (WSM)	↗ 216.7%	57.5M PY: 18.1M   YoY: +39.3M
HP (HP)	↘ 96.6%	0.4M PY: 11.2M   YoY: -10.8M	
Barnes & Noble (BKS)	↘ 98.5%	0.3M PY: 20.6M   YoY: -20.3M	
			0.1M