

Fun and Games

Toys and Candy are center stage for Easter promotions

As thoughts of spring spread across the country, retailers and manufacturers geared up for the second largest holiday for Toys, Games, Media and Candy. This *Perspective* will review these categories at 16 different retailers across three classes of trade. We'll assess these categories over the past three years, providing analysis and insight into trends observed in the promotional landscape.

First we take a look at the percentage of inserts containing Toys, Games and Media (TGM) over three weeks prior, two weeks prior and the week prior to Easter across 2009-2011. In all years, the week prior is the key week with the highest percentage of inserts containing these key categories consistently being promoted the week prior to Easter. Interestingly, the largest percentage of inserts containing TGM categories was in 2009

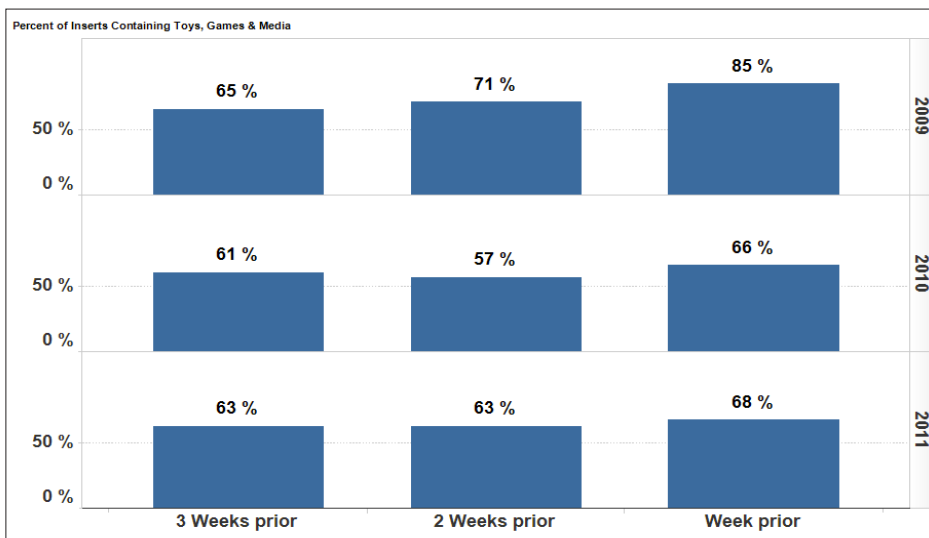


Figure 1: Inserts containing Toys, Games and Media

with 85% of inserts focusing on these categories the week before Easter. While this was still the biggest week in 2010 and 2011, it was muted in both years, with 66% and 68% of inserts containing TGM ads respectively. We believe this shift occurred as retailers were more promotional in 2009 at the height of the recession, encouraging consumers to purchase non-essentials. We see the decline in 2010 as consumers began to have a bit more discretionary income and were more likely to purchase items in this category, therefore retailers were able to scale back promotions and focus on other categories such as Apparel and Food (non-candy). (Figure 1)

Trade Class Analysis

When looking at who devotes pages to TGM, the most significant classes of trade are Electronics stores and Mass Merchandisers. Interestingly, Electronics stores decrease their ads significantly year over year, and are driven by Best Buy whose ads dropped by half from 2009 to 2011. Mass Merchandisers' promotions in this category have remained fairly

In This Article...

Market Track takes a look at the promotional landscape leading up to Easter and how retailers and manufacturers maneuvered the various contributing factors to performance:

- The increase/decrease of share of voice (SOV) for key categories including Toys, Games, Media and Candy
- Comparison across channels of trade with respect to promoting these categories
- A review of manufacturers SOV across various categories
- Multi-channel promotional activity for select retailers

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