

Holiday Shopping Season 2010

A look at the broader landscape

For retailers, the 2010 Holiday Shopping Season (HSS 2010) was a little like the old saw about March, “in like a lion and out like a lamb.” While it is unlikely that anyone wants to complain too loudly about the best sales season in three years, the strength of Black Friday’s sales led to higher expectations for the season as a whole. Unfortunately, December did not carry the full momentum from November’s stellar results as consumer spending leveled off and became increasingly selective. Resulting same store sales for the top 28 retailers tracked by Thomson Reuters were up 3.1% vs. expectation of 3.4%, compared to a robust 6% in November¹.

In this Market Track Perspective, we will look at promotional observations across the entire HSS 2010 period (11/21/10 – 1/1/11) including variances noted between key periods in this cycle; such as before and after Black Friday week.

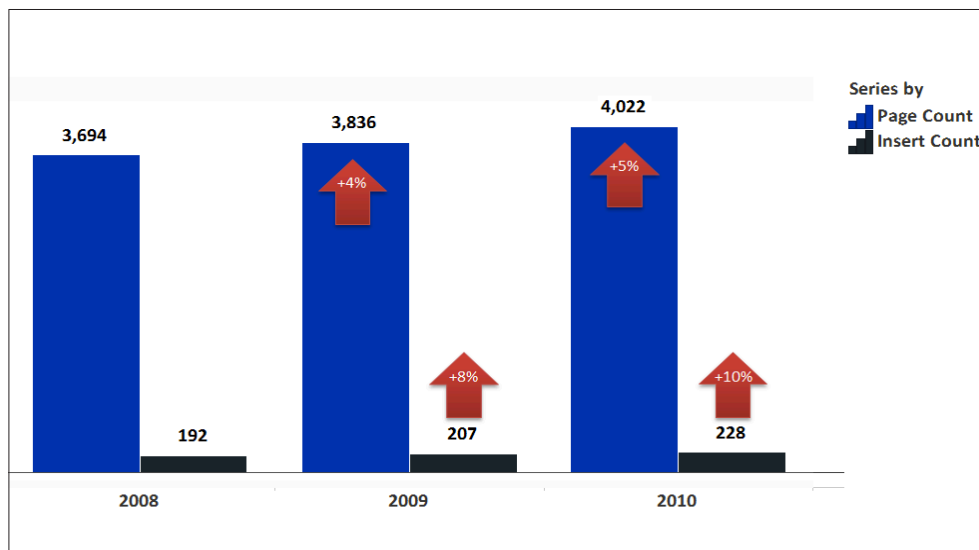


Figure 1: Page and Insert Count by Year

Core Promotional Attributes – Circular Volume / Page Counts

Retailers aggressively promoted in 2010 with a sharp 10% increase in the number of circulars dropped during the period (Figure 1), following an increase of 8% in 2009. The increases are a reflection of the trend seen during Black Friday, in which several retailers dropped multiple circulars. The number of circulars was up in every week of the season with the exception of Week 52 (Christmas week) and Week 53 (Figure 2).

The three top Mass Merchants dropped a total of 42 circulars during HSS 2010, a sharp increase from 25 in 2009, which illustrates the increase in multi-drop weeks. Interestingly, total page counts were only up 11%, indicating that this strategy was more about influencing the consumer with unique front page themes or securing drops on multiple days during the week than it was just a volume advertising increase. *(Continued on P 2)*

¹Thomson Reuters

In This Article...

Market Track takes a look at promotional observations across the 2010 Holiday Shopping Season and how retailers maneuvered the various contributing factors to performance:

- Learn how the different trade classes altered their circular volume and density over the 6 weeks of the HSS
- Gain insight into the department and key category mix between trade classes and how these varied through the HSS
- Understand front page / home page activity – how are retailers varying their use of these two highly valuable segments of the promotional real estate

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