



Times & Trends

The Next Generation of Shopper Marketing

Re-Architecting Shopper Marketing for Maximum Performance

MAY 2010

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Symphony **IRI** Group

Insight.
Innovation.
Impact.

Redefining the New Shopper Marketing Landscape

Most CPG leaders are likely to be ill if they read one more article that includes phrases like, “in today’s economy” or “as a result of the downturn.” The recession resembled a tornado, blowing through the economy and destroying everything in its path. Gone are some strong brands and retailers, as well as many weaker ones.

Similar to the survivors of a tornado, today’s CPG leaders are climbing out of the underground shelter, dusting themselves off, and rebuilding; adapting to a new reality. It is time to stop looking back and to look forward, reinforcing the successful practices of the past and reinventing the strategies that were less successful.

Also like a tornado’s aftermath, the CPG landscape is different in sometimes obvious and sometimes subtle ways. Shoppers have redefined value, with many skewing the definition toward low price. Many are shopping at more stores than ever before to find that value. People are eating at home more and purchasing more self-care products.

Many trends are easy to spot and others are harder. Once innovative CPG leaders have identified key trends, how do they best monetize them? Previous SymphonyIRI reports have focused on reconstructing brands and rebuilding retail. This month’s Times & Trends focuses on reimagining the shopper marketing process to maximize brand and retail performance.

SymphonyIRI has created a seven-step approach designed to optimally leverage CPG and retailer resources for developing product, promotion, pricing, store and shelf layout, assortment and other strategies that are aligned with shopper needs as well as each other to create an optimal shopper experience.

The SymphonyIRI process is designed to maximize CPG influence throughout the four phases people pass through during the purchase process:

- When the consumer is researching products at home
- As the consumer travels to the store
- In the store as the consumer evolves into a shopper
- As the shopper shops, selects products and becomes a customer

One area where there is significant room for improvement is collaboration among manufacturers and retailers. This is especially important for the two middle phases of the purchase process – when consumers are traveling to the store and once they are in the store. It is during these phases that the consumer is evolving into the shopper, and where the influence of the manufacturer gives way to the influence of the retailer. If the touch points with consumers/shoppers in that handoff are inconsistent or conflicting, they will likely delay their purchases or switch to other brands. If these touch points are coordinated, they will be influential, and shoppers will accelerate the purchase decision, contributing to building of brand loyalty.

Savvy CPG and retail innovators are over the recession and seeking out new opportunities to satisfy shopper needs and build loyalty. As you build and hone your own processes, I hope you will share your successes.



Robert I. Tomei
President, Consumer & Shopper Insights

Executive Summary: Turning Insights Into Action

INSIGHT

- ❑ In an environment marked by intense competition, rapidly changing media, and fragmented brand loyalty, CPG marketers are faced with the fact that the “old way” of marketing is simply not bringing the desired results
- ❑ Today’s consumers follow a wide range of CPG shopping strategies and are influenced by many factors, including life stage, need state and more
- ❑ Trip missions have been used successfully for years as a key indicator of shopper purchase behavior, but, as shopping patterns change, these analyses are being augmented by more comprehensive shopper-centric analyses known as trip route analyses
- ❑ Store selection is a complex process that is influenced by a range of factors, most of which tie to three core values: time, money and quality
- ❑ Merchandising activity has escalated as CPG marketers vie for share of wallet; price-only actions are being heavily leveraged across a wide range of CPG categories and departments

ACTION

- ❑ Rebuild the marketing organization from the bottom up to provide the framework for a holistic and integrated approach to shopper marketing
- ❑ Gain deeper insights into shopper behavior by integrating a full spectrum of shopper intelligence into all analyses; leverage these integrated findings as the foundation for all planning, engineering and optimization tasks
- ❑ Supplement “tried and true” consumer and market assessment processes with a 360 degree perspective of shopper behavior where shopper knowledge is applied at the individual household and store level
- ❑ Develop and prominently tout a solid value proposition that effectively leverages a combination of programs-from sales to store brands-which are reflective of the needs and wants of key shopper segments
- ❑ Model and heavily test price changes before implementation to understand the breadth and depth of impact achieved across performance measures

Introduction

Over the course of the recession, consumers have made significant changes to their daily rituals. From health care and pet care, to eating and cleaning, today's consumers have become increasingly self-reliant. Rather than going outside the home for many of these services, consumers have adopted a do-it-yourself attitude, and they have turned to CPG marketers to help them get it done. From this perspective, it is a time of great opportunity for the packaged goods industry.

But the road to success is not easy. Competition is high and margins are tight. Each year, more than 30,000 new products are introduced, yet consumers are demanding a simpler shopping experience. Competition for shelf space is quite high, and SKU rationalization is increasingly commonplace. On top of all that, the task of serving the customer is more complex than ever.

CPG shopping today can be difficult for consumers, too. On any given day, 3,000 marketing messages reach the average consumer. As technology advances, this number will only go up. Information overload has become all too common.

Store brands have a seat at every table and an established place in every household, beauty and medicine cabinet. Only 5% of shoppers are loyal to a single brand, and store brands have posted sizable growth, particularly over the course of the recession. In some ways, store brands have added another layer of complexity to the equation.

It is no wonder shopper loyalty is very evasive these days. Today's CPG environment is quite different from days gone by. Old marketing tricks, it seems, just don't work anymore. It's time for a new playbook.

In this new playbook, the shopper will play the lead role. Tomorrow's most effective marketing programs will be based upon a 360 degree view of the shopper. And, that shopper perspective will be at the individual level, rather than aggregate level.

The good news is that the information necessary to write this playbook already exists. Now, the challenge is to harness that information, cultivate it into knowledge, and use that knowledge to develop and execute programs that drive not only purchase behavior, but also true shopper loyalty.

This issue of Times & Trends provides insights into the consumer mindset throughout each stage of the purchase cycle, from planning to purchase. Insights such as these provide a critical foundation for marketing strategies aimed at delivering the right products, to the right place, at the right price, at the right time, and creating a shopping experience that keeps the best shoppers coming back for more.

Overview

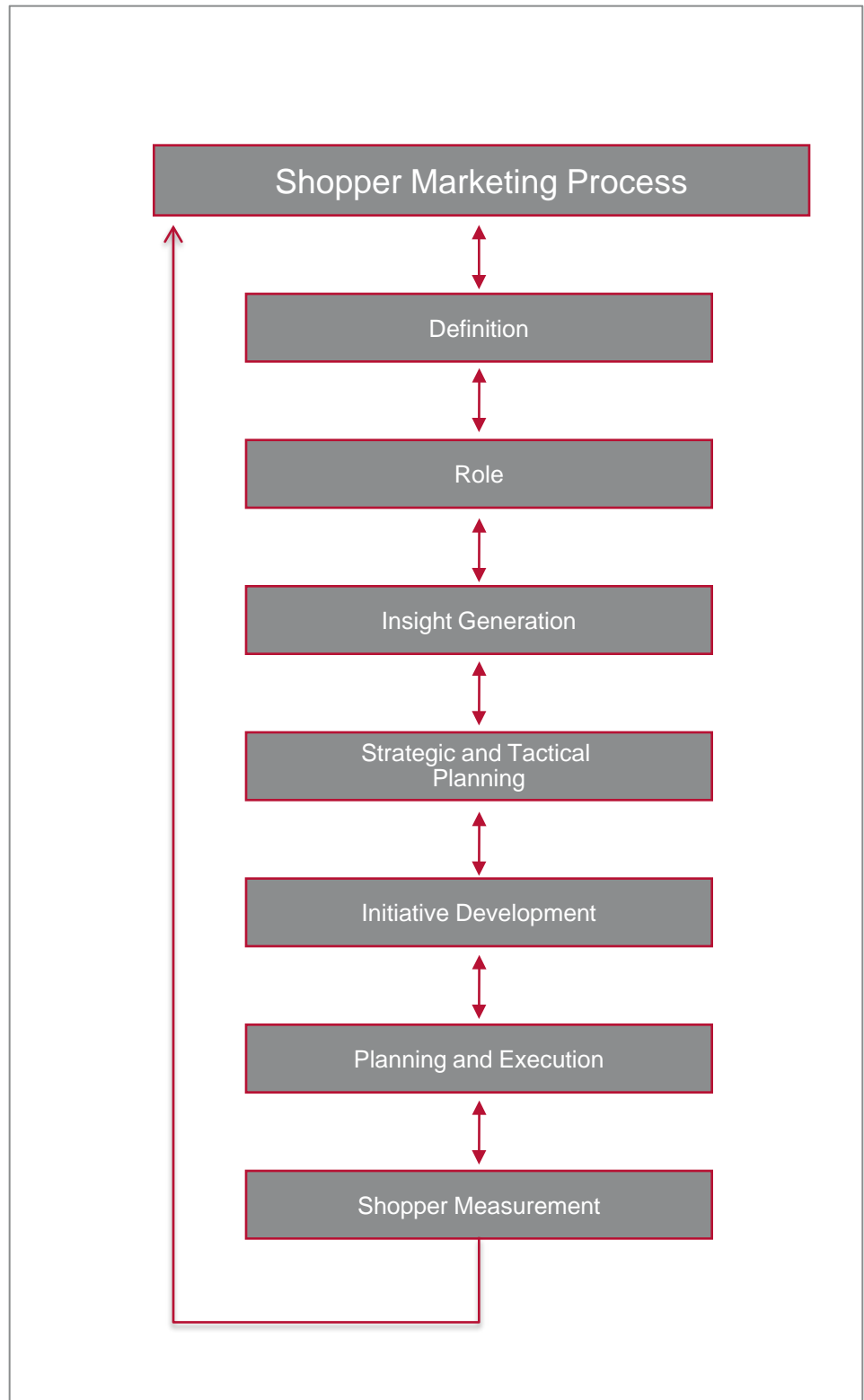
In days gone by, CPG marketers operated in two separate and distinct silos. One group of marketers was focused on shopper insights processes. All of the tasks performed by this group focused on the consumer: attitudes, usage, needs, messaging, satisfaction, etc.

The other group focused on category management processes. The focus, of course, was on the products: product definition and role, go-to-market and sales strategies, performance measurement, etc. These side-by-side approaches worked for many years.

But, today's CPG market is quite different. Competition is intense, media are changing quickly and increasingly fragmented, brand loyalty has diminished, and change is a constant. As a result, old marketing strategies simply fail to deliver the desired results.

The game has changed. Today's most powerful CPG organizations will align these two disciplines to create an integrated, actionable and sustainable strategic organizational and operational differentiator called **Shopper Marketing**.

Shopper marketing techniques may vary, but the goal is always the same: to convert shoppers to buyers. The pages that follow provide insights into the mind of today's consumer, laying the groundwork for true shopper-centric marketing strategies that will resonate with shoppers be instrumental in loyalty value creation.



Product Marketing



Trip Strategies As % of Shoppers

To identify growth opportunities and successfully develop value propositions, CPG marketers must begin with a holistic shopper segmentation.

That segmentation must be based on much more than frequent shopper purchase data. It must be founded on an integrated analysis of these data plus demographics, life stages, needs, usage and more. It must provide insights into not simply what consumers buy, but also to why and how they shop for those products. And, it must provide these insights across all retail channels and outlets.

Each of these variables is a moving target which is influenced by any number of forces. Over the past few years, the most pervasive force has been the economy.

Perhaps one of the most powerful

hallmarks of recession-weary shoppers is a deliberate and pre-planned approach to CPG shopping. Today, three-quarters of shoppers are planning what they will buy, when they will buy it and where they will buy it before they leave the home.

As detailed in the October 2009 edition of Times & Trends, the propensity to make shopping decisions before leaving home has increased dramatically over the course of the recession. Though the economy is showing signs of brightening, ongoing consumer research indicates that “pre-planned shopping” will remain firmly entrenched throughout 2010, and beyond.

Nearly two-thirds of consumers are using store circulars to make informed shopping decisions today. CPG marketers must fully leverage this important communication vehicle.

To be effective, messages must be relevant to key shopper segments. Sales and special offers are important, but circulars can also build relationships. For example, 31% of consumer are looking for products that will create a low cost meal. Careful circular layout that ties with in-store merchandising will facilitate this process and build goodwill among time crunched shoppers.

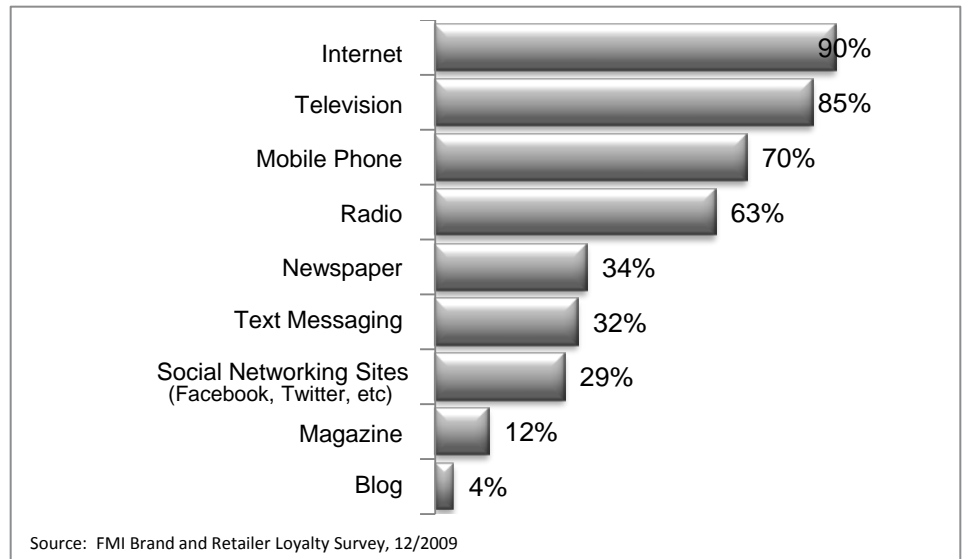
Just under one-quarter of consumers choose products because of loyalty card discounts. While consumers view “a good loyalty program” as important, many programs offer consumers reduced prices on select items but very little beyond that. Discussed later in this report, CPG marketers can cultivate true loyalty with consumer centric programs that are truly unique.

Product Marketing

Media opportunities are changing quite drastically these days. The most common “old media” channels increasingly playing a secondary roll on consumers’ daily lives. CPG marketers must quickly adapt, exploring new media and developing competencies which will allow communication with consumers at the next level.

The new world of CPG marketing is one of integration. The Internet is part of daily life for 90% of consumers today, actually surpassing daily viewing of television. Mobile phones are used daily by 70% of the population.

It is up to CPG marketers to invest to understand how different media investments impact their bottom line. Marketing platforms are transforming, opening the door to entirely new ways to communicate with and influence consumers.



Daily Use of Traditional and New Media
As % of Shoppers

Del Monte Foods, for example, has adopted a more consumer-centric approach to marketing. States CMO Bill Pearce, “It’s not just what you do on TV, but how you surround the consumer on the integrated marketing (front).¹”

With shopping patterns changing quickly and new analytical technologies surfacing

almost daily, this is no easy task. While analytic and promotional tactics are many and varied, the goal is the same-to maximize sales revenue and profit. Those tactics founded on solid and pervasive shopper needs and wants will maximize return on investment and enhance shopper loyalty.

Shopper Marketing

Trip Type	# Items	All Outlet Average \$ Spent	Mindset	% of All Outlet Trips	% of All Outlet CPG \$
Quick Trip	1-5	<\$40	Need it now, have to make a trip	55.6%	23.0%
Special Purpose	2-10	\$20-\$50	Buying for a specific event (not routine)	16.6%	17.9%
Fill In	5-15	\$30-\$80	Routine fill-in on heavy use categories	14.3%	19.5%
Pantry Stocking	15+	\$50+	Prepare for the coming week	13.4%	39.6%

Source: SymphonyIRI Trip Typology; SymphonyIRI Consumer Network, 52 Weeks Ended 3/28/2010

Trip Mission Overview 2010

Trip missions are a critical component of shopper marketing. After all, simply stated, a shopper is a consumer on a mission. It is that mission that defines a consumer's mindset. And, understanding that mindset is the key to successful marketing.

It is no easy task. The consumer mindset is influenced by a number of factors, including purchase needs and time considerations. In fact, purchase needs and time considerations are defining factors in determining type of trip, or trip mission. Trip mission permeates every aspect of the shopping trip, from beginning to end.

For example, trip mission has a major influence on channel and store selection.

On the pages that follow, this report will detail this relationship, as well as how a prolonged recessionary economy has impacted channel and store selection processes.

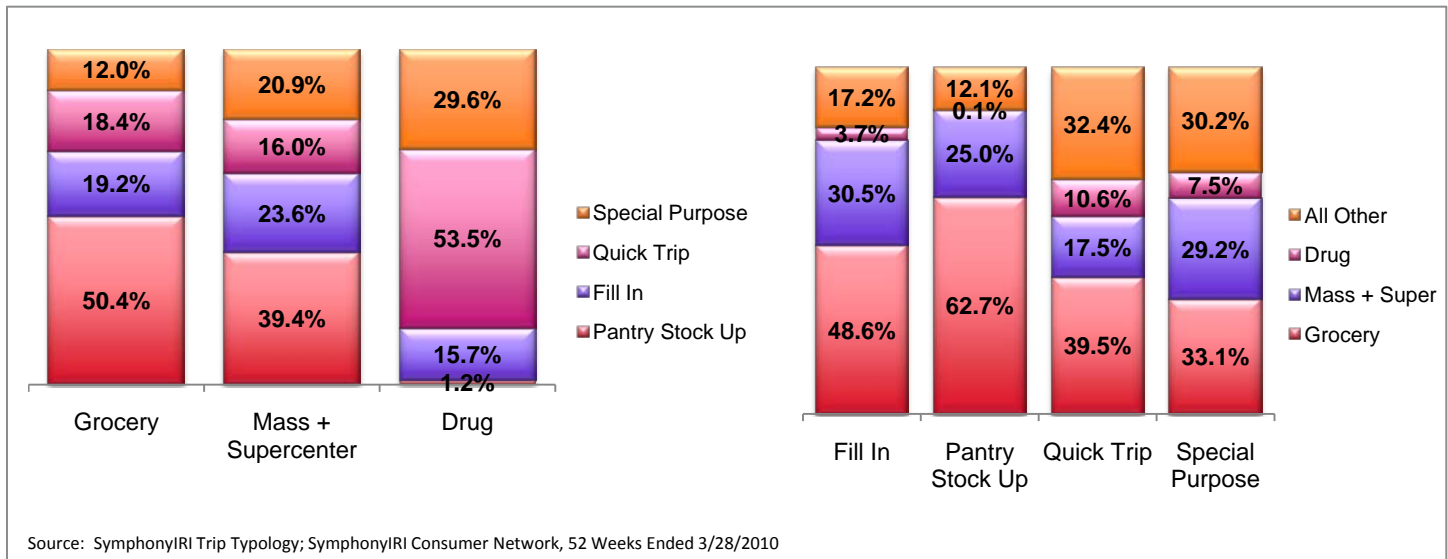
Trip mission also impacts behavior inside the store. In fact, purchase quantity, product bundles and paths through the store are all largely defined by trip mission.

To isolate primary trip missions, SymphonyIRI created the SymphonyIRI Trip Typology™ platform. This platform is an analysis of over eight million shopping trips which identified 31 distinct trip types, and it rolled them up into the four primary trip missions which are summarized on this page.

Understanding trip missions across key consumer segments is key to optimizing product mix and store layout. It is also essential to the creation of powerful cross-promotion and merchandising campaigns which reinforce or realign primary trip mix.

Trip mission is also critical for manufacturers. Those manufacturers with a solid understanding of trip mix across key categories and brands have the opportunity to enhance supply chain responsiveness to shopper purchases, improving turns and bolstering return on supply chain investments. They will also have the foundation for shopper-centric promotional campaigns among key retail partners, effectively growing share of wallet across primary and target trip types.

Shopper Marketing



Trip Mission as % Dollar Sales By Channel- 2010

Channel as % Dollar Sales By Trip Mission 2010

Consumers are entrenched in conservative shopping patterns. But, these patterns are complex. Shoppers today seek personalized affordability. They are on a mission to find what is best for their families, but they are determined to find those solutions at the best available price.

Today 55% of shoppers are shopping across ten or more retail outlets to maximize the return on their CPG investment.

These trips are reflective of all trip missions, and multiple trip missions are represented across CPG channels today. Consistent with historical patterns, grocery, supercenters and mass merchandisers dominate the pantry stocking mission. Despite long-lasting economic difficulties, these channels combined have

consistently represented about 88% of pantry stocking trips each of the past several years.

Within those three channels, though, shopping patterns have shifted over the past three years. For example, in 2007, the grocery channel represented 65.9% of pantry stocking trips, while mass merchandiser and supercenters combined represented 22.6% of pantry-stocking trips.

By 2010, grocery share of pantry stocking dollars had slipped to 62.7%, while mass and supercenters combined climbed 2.4 share points to 25%.

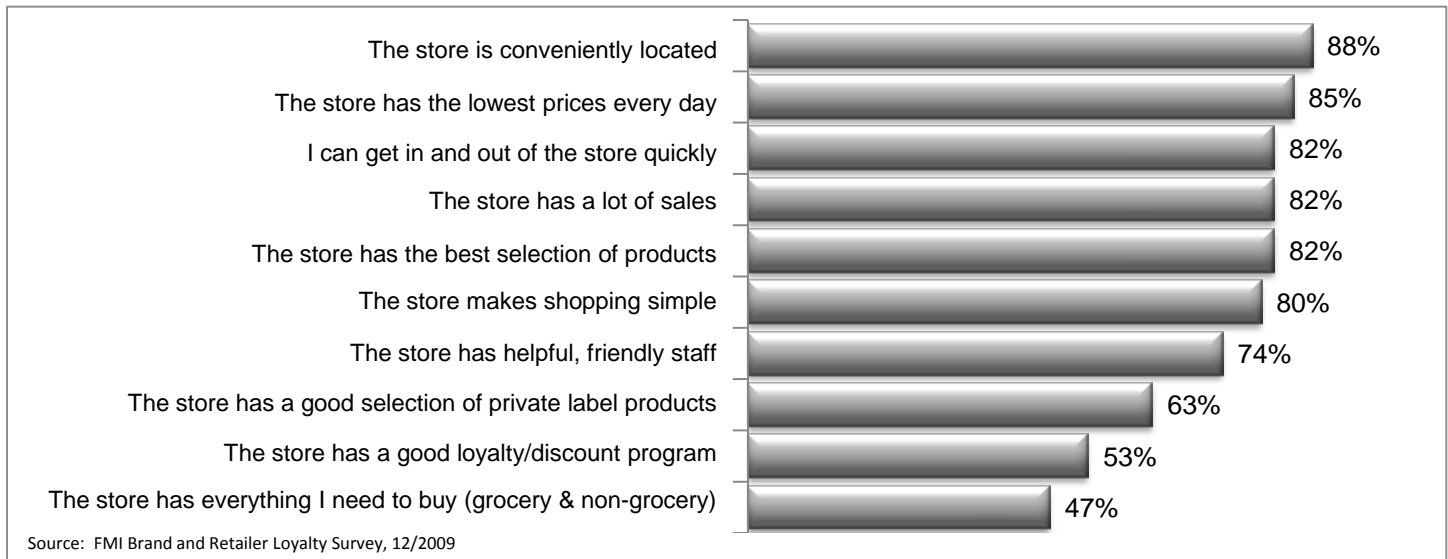
Simply stated, consumers shop differently today. It is absolutely essential that all marketing strategies are reflective of these changes.

Today's trip mission-based analyses are quickly evolving into a more powerful strategy: consumer-centric trip route analyses.

Where trip missions would identify trip types by segmenting store visits based on basket contents, trip routes identify shopper-level segments which will guide store and category loyalty. Why? Because today's shopper is not loyal to one store. Today's shopper is loyal to finding effective means to maximize the return on CPG investment.

Ongoing tracking of trip route segments provide CPG marketers with the knowledge necessary to build strategies which aim to maximize share of targeted trips.

Shopper Marketing



Top 10 Important Store Attributes As % of Shoppers

The store selection process is rather complex and is characterized by a broad consideration set. In general, though, key criteria tie quite closely to three core values: time, money and quality.

Across consumer segments, time is at a premium. When it comes to grocery shopping, consumers want to get what they need and get on with life. Today's hectic lifestyles have elevated the importance of making shopping convenient.

Store location is essential, but it is not the only measure of convenience. For example, 82% of consumers are looking to get in and out of the store quickly. This is no easy request to fill, for one-stop shopping is very important, too.

With the economy in prolonged state of uneasiness, the need for a defensible value proposition has been elevated. Consumers want to know what to expect when they walk into the retail store. "I want a steady, low price. I don't want to pay a vastly different price each time a buy the same product¹." It seems that this mantra has become quite pervasive over the past two years.

SymphonyIRI Group has closely followed the ongoing recession and resulting changes to consumer rituals, attitudes and behaviors. Today, 85% of consumers consider everyday low prices an important store attribute. Truly, though, the drive is for value. Sales, store brands, and discount programs are playing a key role in establishing and/or elevating the value

proposition of retailers today. Key features of some of these programs will be detailed later in this report.

Though consumers have restricted spending, they are not willing to forego quality. They want quality in their CPG products, and they want selection- of national and store brand products.

Gas prices have subsided, and trip behavior has resumed a positive trajectory. Mentioned earlier in this report, SymphonyIRI Group's "Understanding the Shopper in the New Decade" reveals that 55% of shoppers are shopping ten or more retailers today. Shoppers have a new loyalty, and that loyalty is to value.

Shopper Marketing



Important Loyalty/Discount Program Features As % of Shoppers

Illustrated earlier in this report, 53% of consumers rate a “good loyalty/discount program” as an important feature in the store selection process. But, just what is a “good loyalty/discount program?”

Reduced prices are a fairly widespread and expected feature of loyalty/discount cards. But, a range of convenience and value-oriented features provide opportunity for differentiation and, perhaps, a level of customization.

For example, two-thirds of shoppers would like a loyalty/discount program that provides coupons on frequently-purchased items, and 55% would like cash back for purchases. The CVS ExtraCare program provides a variation on both of these features. Shoppers receive 2% in “Extra Bucks” on every in-store and online purchase. Members also receive savings

on featured items along with coupons and special offers throughout the year.

According to Colloquy, the average U.S. household participates in 14.1 loyalty programs¹. Such a crowded marketplace leaves competing retailers feverishly working to “out-do” one another. The result is definitely not customer loyalty. In reality, many of today’s “loyalty programs” are truly discount programs.

The ultimate goal of an effective loyalty program is to build lasting customer relationships. To reach that goal, the program must be founded on a sound understanding of the needs and wants of key consumer segments.

More than one-quarter of consumers seek a loyalty program that is tailored to their needs. In order to “customize” a loyalty

program, the retailer must understand how often the target shopper visits the store and what the basket looks like on each visit. With that information, the program can offer targeted money-saving offers, appropriate educational materials, recipes, and more. As an added benefit, having this intimate knowledge of important consumer segments also facilitates store planning and purchasing processes.

Differentiation is critical today. Marketers must understand what it is that loyalty program members covet and what they buy, and they must also understand how these needs and wants differ from non-members, if at all. It is this type of information that will enable marketers to build a strategic roadmap of programs that will maximize share across the addressable market.

Shopper Marketing

Product availability plays a huge role in providing convenience and good service to the shopper. In fact, illustrated earlier in this report, 82% of shoppers rate “store has best selection of products” as an important store selection criteria.

But, with rapidly occurring consumer behavior shifts, it is becoming increasingly difficult to predict what product(s) a shopper will want on any given trip. This reality underscores once again the importance of continually measuring shopper patterns and preferences at a granular level.

Shopper marketing plays a critical role in assortment planning. Even when everything else is done correctly, if the product is not available on the shelf when the shopper is looking to buy, the sale will never be made.

It is long-known that frequent out-of-stock conditions lead to frustrated shoppers and lost loyalty. In SymphonyIRI’s recent Brand and Retailer Loyalty survey, more than half of shoppers note that they will switch to another brand if their preferred brand is frequently out of stock.



Shoppers' Views on Stocking and Availability As % of Shoppers

CPG marketers must work closely with retailer partners to understand the needs and wants of that retailer’s shopper base. With that knowledge, distribution strategies will consistently meet the needs of the marketplace, and encourage shopper loyalty.

The benefits of collaboration apply equally to retailers. More than one-third of shoppers will stop shopping at a store if that store is frequently out of stock on preferred CPG products.

In an increasingly complex CPG arena, the supply chain is becoming more difficult to manage. As it evolves, it must do so with the consumer at its core.

In-Store Marketing

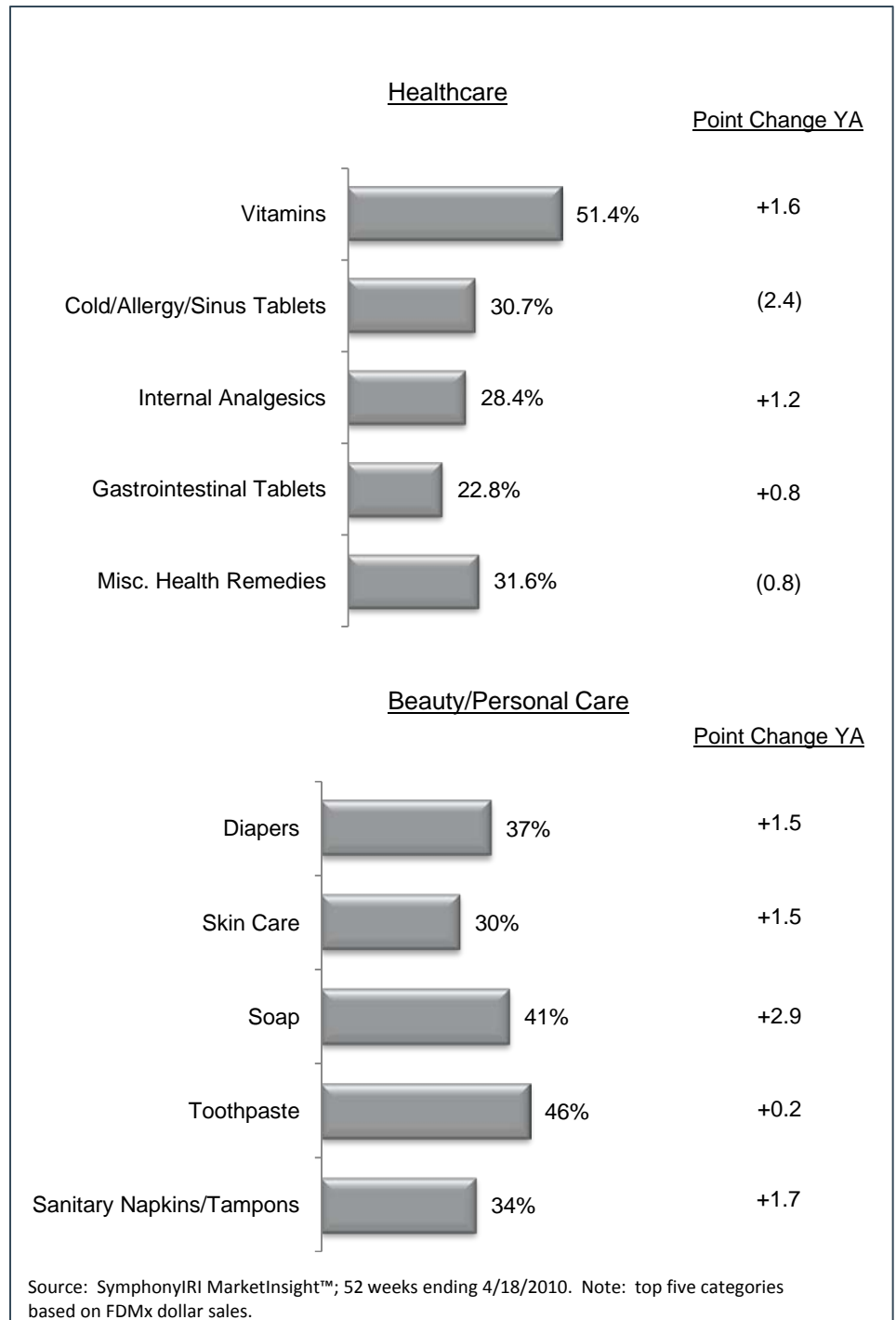
Even in the best of economic times, merchandising is a key driver of consumer purchase behavior. In periods of ongoing economic difficulty, merchandising is downright critical.

Conservative shopping behaviors have been discussed throughout this report. Consumers are looking for affordable CPG solutions, and they have demonstrated a willingness to shop multiple channels to achieve this goal.

SymphonyIRI has reported heavily on another recession-driven trend that is changing the way consumers shop: self-care. One-third of consumers are going to the doctor less frequently in favor of self treating to save money. Likewise, 34% of consumer are using home-based beauty care products more frequently.

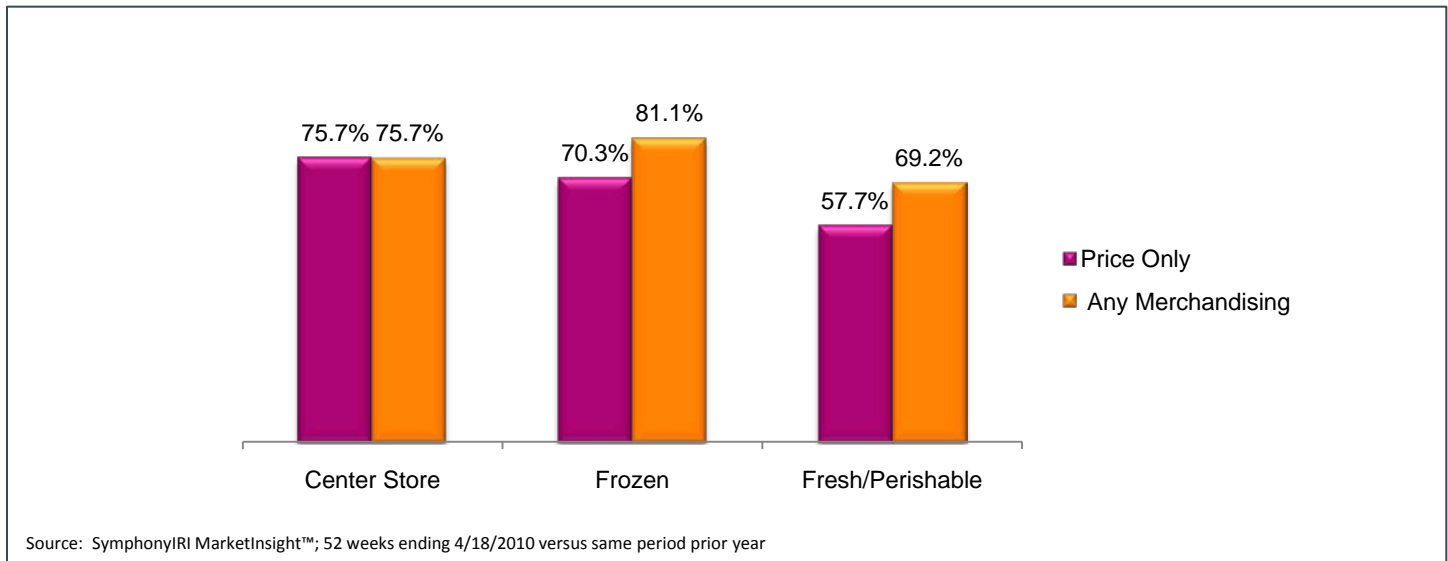
CPG marketers are working to capitalize on these trends. Merchandising activity is up across a majority of healthcare and beauty/personal care categories. Detailed in the February issue of Times & Trends, battle for share across these departments is fierce.

Certainly, merchandising is critical in today's conservative shopping environment. But, to properly balance shopper versus corporate objectives, today's merchandising strategies must be accurate, flexible and dynamic. In other words, they must be consumer-centric, data driven and fact-based.



**% Volume, Any Merchandising
Among Leading Health & Beauty Care Categories
FDMx**

In-Store Marketing



2010 % Categories Experiencing Increase in % Volume, Any Merchandising Among Fresh/Perishable, Frozen Foods and Center Store (Food) Departments FDMx

Also heavily reported by SymphonyIRI Group, at-home and from-home meal rituals have exploded over the course of the recession. Even as the economy is beginning to slowly improve, consumers are fully engaged at home-based food rituals as a means of saving money.

Still, many consumers are struggling to balance their budget from week to week. SymphonyIRI's recent Economic Update Survey reveals that 28% of shoppers are having difficulty buying needed groceries. And, 80% of consumers expect grocery prices will increase in 2010.

Not surprisingly, competition for share of meal ingredient and component categories is quite high today. As a result, merchandising across these categories is quite high. Over the past year,

merchandising activity has increased in the vast majority of center store, frozen and fresh/perishable department categories.

Across each of these departments, price-only actions were leveraged quite heavily. In the frozen foods department, for example, 70% of categories are seeing more price-only actions versus a year ago.

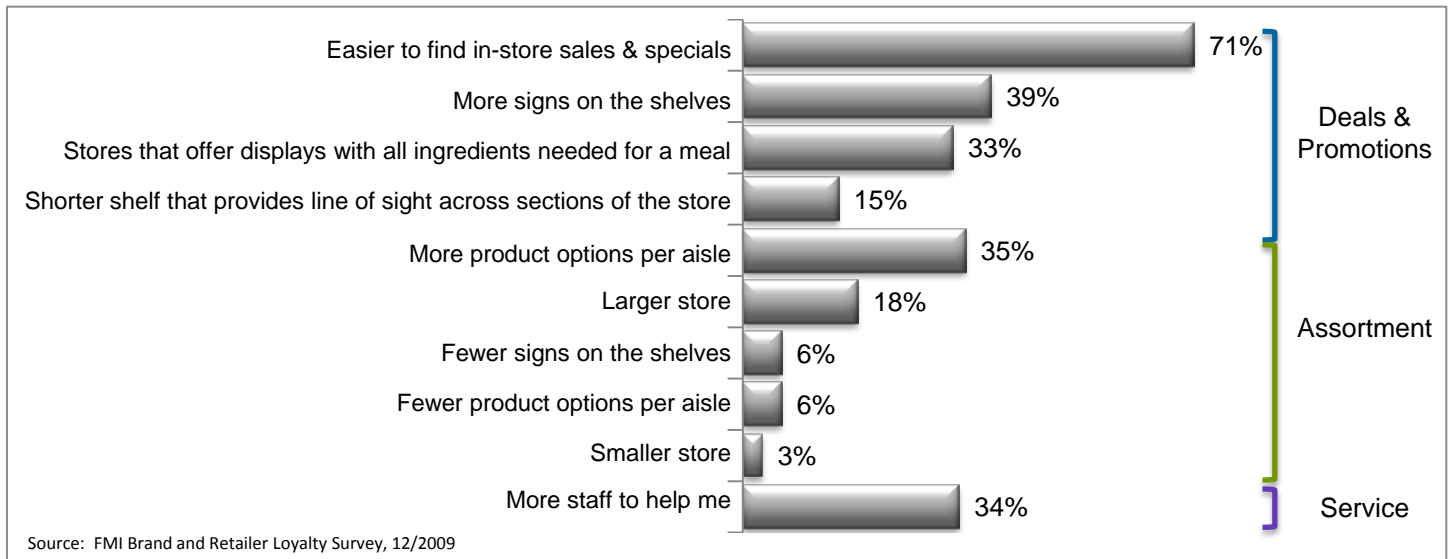
Mentioned elsewhere in this report, retailers, particularly grocers, are heavily marketing more aggressive pricing strategies. Frequently, these strategies are Everyday Low Price strategies, seeking to enhance the retailer's value image across consumer segments.

With inflation expected to return this year and consumers fully entrenched in money saving mode, the battle for share is quite

fierce. As such, pricing strategies are likely to remain aggressive in the foreseeable future. But, it is a delicate balance. Over-use of price-only actions can have a negative impact not only on margin, but also on the brand.

In this environment, it is critical that CPG marketers model and heavily test price changes before implementation to understand the impact of various pricing scenarios on sales, traffic and basket performance.

In-Store Marketing



Ways to Make the Shopping Experience Easier As % of Shoppers Reporting Simplicity as Very Important

Detailed earlier in this report, among 80% of consumers “a simple shopping experience” is essential to shopper satisfaction. Much has been written about the idea of simplifying the shopping experience. Nonetheless, the concept remains nebulous.

Indeed, simplicity is a matter of perspective. In general, though, consumers view simplicity across three realms: deals and promotions, product assortment and customer service.

Most importantly, consumers want to be able to readily locate and identify desired products and special offers. A shopper-centric approach will ensure that merchandising and promotion strategies are consistently and closely aligned against trip missions and shopping patterns and preferences of key shopper segments.

Product selection is also critical. SKU rationalization has been heavily debated over the past several months. Several

Retailers, including Walmart, have reduced product assortment only to reinstate some products in response to unfavorable shopper response. It is a difficult balance.

While the debate continues, there is no doubt that consumers will not shop a store that does not carry the products they desire. This issue is explored in greater detail later in this report.

And, of course, customer service is essential. One-third of shoppers feel that additional staff would simplify the shopping experience. Certainly, it is not all about quantity of staff, but rather quality. Team members must be visible and engaging.

Walgreen's is in the process of rolling out a new program, dubbed CCR (short for Consumer-Centric Retail), that cuts across each of these critical areas¹. The height of store shelves is being adjusted downward

to increase visibility across the store. With the new shelving, shoppers will have a better view of the pharmacy and of newly developed store signage.

Assortment is also being addressed. As part of the rollout assortment is being simplified and product adjacencies are being enhanced with the goal of conveniently locating products based on common needs (e.g. baby needs) rather than by category (e.g. shampoo, body wash, etc).

Shifts such as these create and/or enhance simplicity. Making CPG solutions more turnkey in nature is an important step in creating value, and also important to driving true shopper loyalty.

Conclusions: CPG Manufacturers

Manufacturers seeking to benefit from the power of shopper marketing should consider the following action items:

❖ Product Marketing

- Drive marketing platforms to a new level by integrating old and new media with consistent and/or complementary marketing messages
- Ensure media mix begins to impact the shopper in the home and reinforces message throughout the shopping experience
- Collaborate with key retailer partners to facilitate shoppers' planning process; consider messaging and tools, such as coupons and innovative money-saving offers, that will improve the odds of "getting on the list"

❖ Shopper Marketing

- Understand trip mission strategies of key retailer partners, and collaborate to ensure that assortment reflects dominant/desired purchase patterns
- Partner with key retailers in the development of loyalty program offers targeted against the needs/wants of key shopper segments
- Reduce out-of-stock situations by developing distribution strategies that are reflective of dominant/desired trip missions and purchase patterns

❖ In-Store Marketing

- Work with retailer partners to determine most effective product location; location within the store and product adjacencies should reflect dominant trip types, as well as targeted trip types, where relevant
- Tie in-store efforts with externally-targeted promotional campaigns to reinforce/solidify purchase decisions made prior to entering the retail environment
- Constantly measure and monitor in-store initiatives against desired shopper impact; implement mid-cycle adjustments as warranted

Conclusions: CPG Retailers

Retailers seeking to benefit from the power of shopper marketing should consider the following action items:

❖ Product Marketing

- Drive marketing platforms to a new level by integrating old and new media with consistent and/or complementary marketing messages
- Ensure media mix begins to impact the shopper in the home and reinforces message throughout the shopping experience
- Collaborate with key manufacturer partners to facilitate shoppers' planning process; consider messaging and tools, such as coupons and innovative money-saving offers, that will improve the odds of "getting on the list"

❖ Shopper Marketing

- Clearly communicate trip mission strategies to key manufacturer partners, and collaborate to ensure that assortment reflects dominant/desired purchase patterns
- Partner with key manufacturers in the development of loyalty program offers targeted against the needs/wants of key shopper segments
- Reduce out-of-stock situations by developing inventory management strategies that are reflective of dominant/desired trip missions and purchase patterns

❖ In-Store Marketing

- Work with manufacturer partners to determine most effective product location; location within the store and product adjacencies should reflect dominant trip types, as well as targeted trip types, where relevant
- Tie in-store efforts with externally-targeted promotional campaigns to reinforce/solidify purchase decisions made prior to entering the retail environment
- Constantly measure and monitor in-store initiatives against desired shopper impact; implement mid-cycle adjustments as warranted

Resources

To gain insight into opportunities that exist to leverage unique and actionable content about consumers and shoppers, and analytical solutions and platforms that drive more effective and efficient 'direct-to-consumer/shopper' marketing, contact your SymphonyIRI client service representative regarding custom analyses leveraging the following resources:

SymphonyIRI Shopper Marketing Suite™

SymphonyIRI's Shopper Marketing Suite is a holistic solution that combines advanced, proprietary, and proven modeling techniques with practical business application that allows you to define and implement your shopper strategies.

SymphonyIRI Loyalty Advantage™

SymphonyIRI's Loyalty Advantage™ is the best solution for shopper marketing programs with comprehensive decision-specific insights based on basket and customer-level detail and incorporating the industry-leading segmentations of SymphonyIRI's Shopper Marketing Suite™.

SymphonyIRI Target Advantage™

TargetAdvantage™ is a consumer targeting and segmentation tool that will deliver actionable insights to enable tactical and strategic planning, implementation and execution, while maximizing efficiency and value.

SymphonyIRI Digital Media Solutions

Digital Media Solutions is a Consumer & Shopper Insights solution, providing manufacturers and retailers the ability to target digital media more effectively and efficiently, and quantify the effects of online advertising.

FOR MORE INFORMATION

Please contact Susan Viamari at Susan.Viamari@SymphonyIRI.com with questions or comments about this report.

About SymphonyIRI Group

SymphonyIRI Group, formerly named Information Resources, Inc. ("IRI"), is the global leader in innovative solutions and services for driving revenue and profit growth in CPG, retail and healthcare companies. SymphonyIRI offers two families of solutions: Core IRI solutions for market measurement and Symphony Advantage solutions for enabling new growth opportunities in marketing, sales, shopper marketing and category management.

SymphonyIRI solutions uniquely combine content, analytics and technology to deliver maximum impact. SymphonyIRI helps companies create, plan and execute forward-looking, shopper-centric strategies across every level of the organization. For more information, visit www.SymphonyIRI.com.

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The logo for SymphonyIRI Group features a red curved line above the text. "Symphony" is in a dark grey serif font, "IRI" is in a bold red sans-serif font, and "Group" is in a dark grey sans-serif font.

SymphonyIRI Group