

TIMES & TRENDS

A Snapshot of Trends Shaping the CPG Industry

RETAIL HEALTHCARE MARKETING: NEW GROWTH OPPORTUNITIES ACROSS THE STORE



April 2007

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EXECUTIVE SUMMARY

- ▶ Retailers are investing in healthcare marketing to capture a greater share of growing pharmacy sales; these programs offer a strong platform for driving total store growth that is not yet widely leveraged
- ▶ Major healthcare initiatives at retail include Medicare Part D outreach, discounted generic drugs and in-store health clinics; these initiatives are moving the needle on pharmacy share and consumer perceptions
- ▶ Aggressive Medicare Part D marketing has delivered share gains in prescriptions and healthcare products for supercenters and drug stores within the high-growth senior market; there is sizable upside potential for food and beverages with high-demand health benefits for seniors
- ▶ Discounted generic drug programs have become an important component of the value proposition to the 47 million uninsured, predominantly lower-income consumers for several major retailers, who have benefited from generic prescription share gains
- ▶ In-store health clinics, which will double in number by year-end, address the needs of both time-starved and budget-strapped consumers and represent significant opportunity to grow Rx, over-the-counter medications and health-oriented food and beverages through cross-marketing and cross-merchandising
- ▶ Manufacturer-retailer collaboration is the key to maximizing healthcare marketing potential; collaboration will fall along a continuum, ranging from brand-specific to total health and wellness campaigns



INTRODUCTION

Retail healthcare marketing is delivering results at the pharmacy but is not yet leveraged to drive total store growth.

Medicare Part D outreach. Discounted generic drugs. In-store health clinics. Retailers are increasingly investing in healthcare-based initiatives to drive store traffic, enhance customer loyalty and increase sales.

And, for good reason. Pharmacy sales are outpacing consumer packaged goods sales by a 3-to-1 ratio. Health and wellness has become a powerful driver of consumer purchase and shopping behavior, and winning in this space could well determine winners overall.

Yet, despite major strides in developing healthcare marketing strategies that work (and they are working to drive share pharmacy shifts, as detailed throughout this report), few retailers and manufacturers are fully leveraging these initiatives to drive growth across the store.

Both pharmacy marketing programs and retail health clinics are ripe for cross-promotion with OTC remedies, vitamins and food and beverages with specific health benefits. Cross-promotion would help to convert pharmacy customers to total store customers and increase the basket size of existing store shoppers.

Taken one step further, imagine the impact on consumer perceptions of a store and the brands within it if all health and wellness initiatives were marketed and merchandised under a total health and wellness umbrella so that consumers knew exactly where to go to meet all of their health and wellness needs quickly and conveniently while benefiting from great values.

This issue of *Times & Trends* explores current retail marketing practices and opportunities to extend these initiatives to drive brand, category and total store growth.



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RETAIL HEALTHCARE MARKETING BACKGROUND - PHARMACY GROWTH TRENDS

With pharmacy sales growing at more than 3x CPG sales, retailers are increasingly investing in pharmacy marketing.

With pharmacy sales growing at more than three times the rate of CPG products, and projections indicating continued high growth (6-9%)¹ for the next several years, it is no surprise that retailers are increasingly investing in marketing and promotional initiatives to capture a greater share of pharmacy traffic and sales.

Drug innovation, an aging population, and new demand resulting from Medicare Part D (which provided prescription insurance access to millions of previously uninsured seniors) have all contributed to sustained strong pharmacy growth rates.

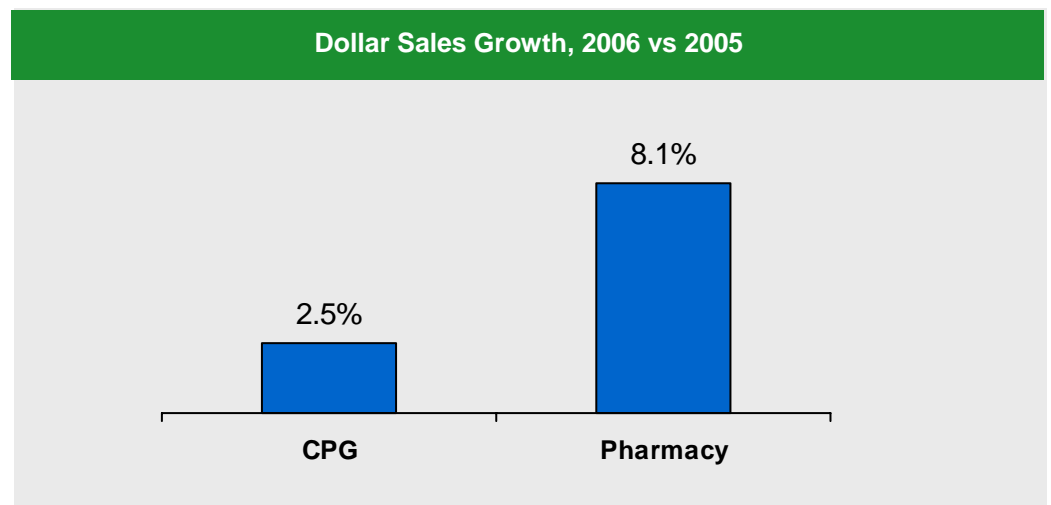
Many retailers have successfully tapped into this trend through pharmacy-based marketing initiatives that have moved the needle on pharmacy share.

Few retailers, however, have extended this success throughout the store by linking the pharmacy with other healthcare and health-oriented food and beverage categories.

This report highlights high-level opportunities to grow brand, category and total store sales through pharmacy-based initiatives.

“Pharmacy is outpacing the rest of the departments. The main reason is more affordable healthcare through Medicare Part D, as well as a number of programs that we have underway.”

- Retail Pharmacy Executive



Source: IRI MarketInsight™; IMS Health

1. IMS Health



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RETAIL HEALTHCARE MARKETING BACKGROUND - HEALTHCARE GROWTH TRENDS

Modest non-Rx healthcare sales can be bolstered by a stronger link to the pharmacy.

Exceptional growth rates within the pharmacy have not translated to growth across non-pharmacy healthcare categories, including OTC medications, vitamins and healthcare supplies.

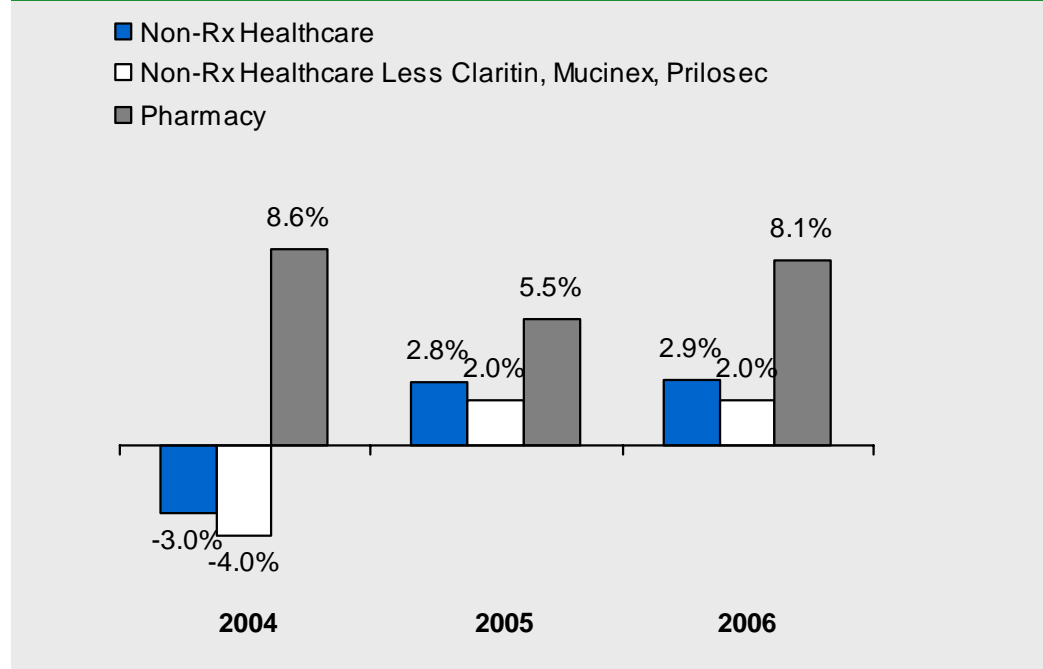
While non-Rx healthcare sales have improved over the past two years, when blockbuster drugs including Claritin, Mucinex and Prilosec are excluded, sales growth is very modest.

The opportunity to link the pharmacy with “front-end” healthcare sales is sizable.

High-potential initiatives include OTC medication coupons at the pharmacy counter or dispensed along with a related prescription; targeted direct mail packets including ailment-specific information and promotions that include Rx, OTC and food and beverages with disease management benefits, or in-store information kiosks in the pharmacy that dispense health information on specific conditions and product recommendations from multiple departments.

While retailers are beginning to tap into this opportunity, initiatives are not widespread.

Dollar Sales Growth by Segment



Source: IRI InfoScan® Reviews, FDMx; IMS Health
Note: Healthcare includes over-the-counter medications, vitamins and healthcare supplies



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RETAIL HEALTHCARE MARKETING BACKGROUND - HEALTHIER FOOD AND BEVERAGES

Linking pharmacy marketing with healthier foods and beverages can move growth potential from good to great.

A growing understanding of the link between diet and general health, combined with an aging population increasingly facing chronic diseases requiring specific diets have caused consumers to reconsider their approach to healthy eating.

As a result, over three-quarters of consumers are actively trying to eat healthier. Two-thirds now look for snacks with nutritional value.

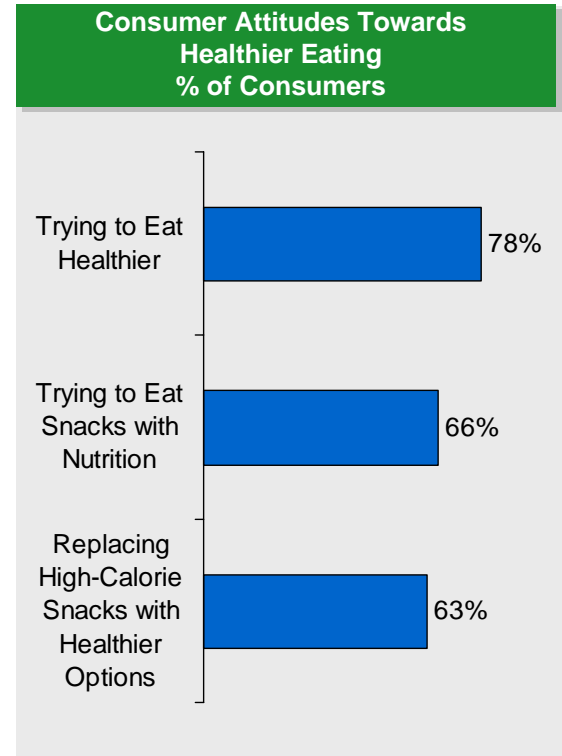
The impact on the market has been significant. Looking at snack foods, for instance, while 2/3 of snack spending is still devoted to indulgent products, healthier snacks are growing at 3x the rate of indulgent snack sales, as illustrated in the bottom right chart.

The opportunity for sales growth among healthier products is substantial. Retailers who capitalize on this potential with a superior selection of healthier products across the store and a health and wellness positioning reinforced by strong marketing and in-store promotions, displays and sampling will see solid total store growth.

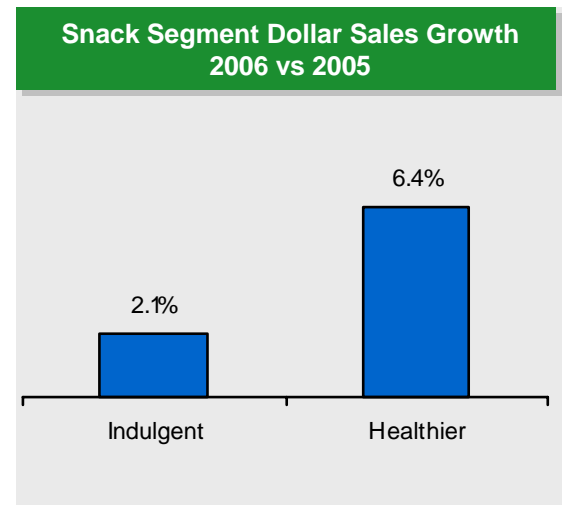
But, consider the incremental potential if these initiatives were linked to the high-growth pharmacy so that healthier products with disease management benefits were promoted along with related prescriptions, for instance, and were available right near the pharmacy in primary or secondary displays. The growth potential moves from good to great.

“We do not currently link in other departments with our pharmacy marketing programs. We are hoping to do it in the future, but we are not there yet.”

– Retail Pharmacy Executive



Source: IRI 2007 Consumer Snacking Study



Source: IRI InfoScan® Reviews, FDMx



RETAIL HEALTHCARE MARKETING CURRENT INITIATIVES

Medicare Part D outreach, discounted generic drugs and in-store health clinics represent major retail healthcare initiatives that are delivering results.

To assess the impact of current retail healthcare marketing initiatives and the extent to which these programs are being leveraged to drive total store growth, IRI conducted a comprehensive analysis of retail practices and consumer shopping and purchase trends through retail executive interviews, primary consumer research and an in-depth analysis of consumer panel and store data.

This issue of *Times & Trends* highlights topline findings from that assessment. A full report of study findings, including insights at the category and retailer level, is now available. This study, entitled "*IRI Healthcare Report: Leveraging Healthcare as a New Platform for Total Store Growth*" includes best practice case studies and outlines specific action items for creating and fully leveraging a total store healthcare marketing platform. (See page 19 for additional details.)

The following section provides an overview of three major retail healthcare marketing initiatives that are delivering results:

Medicare Part D

Effective January 1, 2006, Medicare Part D provides prescription insurance access to over 42 million consumers – the vast majority consumers over age 65 (in addition to younger consumers with disabilities.)

Medicare Part D has had an enormous impact on the market – driving pharmacy sales (but decreasing pharmacy profitability for a high proportion of retailers.)

Many retailers have implemented comprehensive Medicare Part D marketing initiatives to capture share of this growth wave and build relationships with the high-growth 65+ market.

Discounted Generic Drugs

Wal-Mart's announcement that the company would be offering \$4 generic drugs drove mixed reaction throughout the industry. Many retailers followed suit. Others did not. Responses varied to a large extent by perceived opportunity and risk depending upon the mix of generic drug consumers and those paying out of pocket.

As detailed later in this report, discounted generics have resulted in pharmacy share shifts.

In Store Health Clinics

A growing number of retailers are offering health clinics within their stores to increase store traffic, grow pharmacy sales and offer a value-added convenience to their consumers. While the clinics are not yet heavily leveraged to grow sales across the store, the potential is recognized and will likely be tapped by progressive retailers and manufacturers in the near term.



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MEDICARE PART D CHANNEL SHARE SHIFTS - PHARMACY

Medicare Part D outreach programs have resulted in drug store and supercenter Rx share gains among seniors.

Aggressive Medicare Part D outreach to seniors by drug stores and supercenters paid off with sustained growth in Rx transaction share among 65+ consumers one year after Medicare Part D implementation.

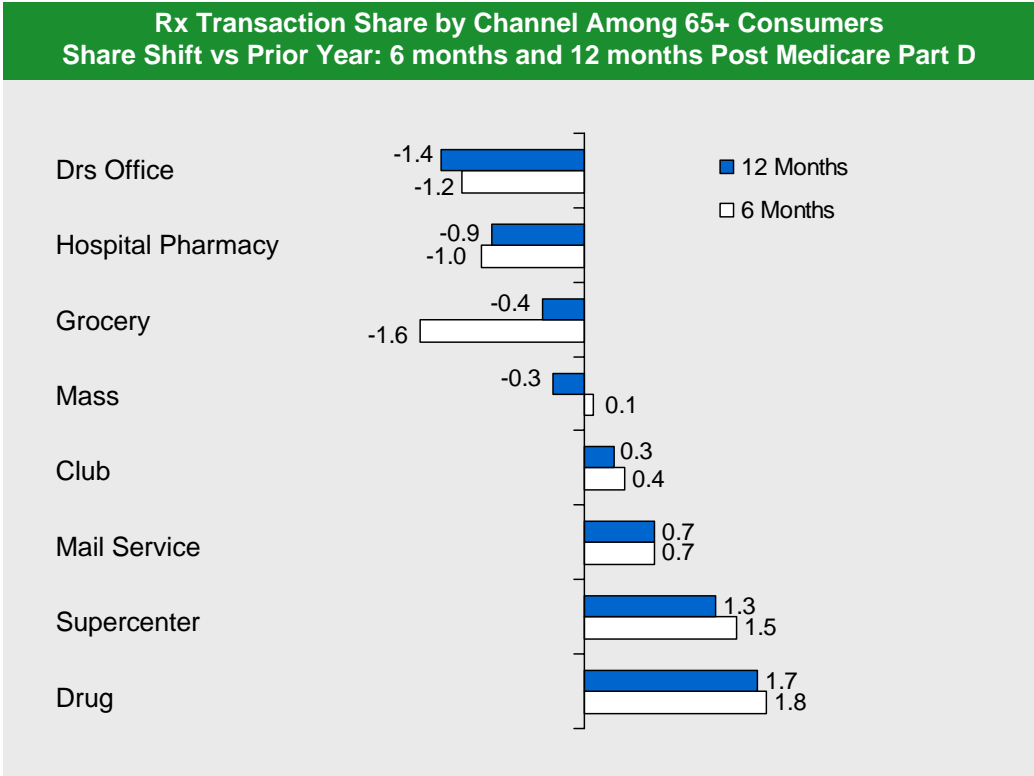
In-store educational sessions, brochures and one-on-one counseling regarding the right plan for each consumer not only helped to bring senior prescription consumers into the store, but also appears to have contributed to building longer-term relationships, as evidenced by the ability to hold onto the increased share one year later.

Although the grocery channel was initially hit by sizable share losses among seniors, the channel is bouncing back as more grocers conduct Medicare Part D marketing and customer support.

With over 3 million consumers turning 65 and becoming eligible for Medicare Part D every year for the next decade, this will remain an important marketing platform for retailers seeking to build relationships with this growing consumer segment.

“We have had a very positive impact overall from Medicare Part D. Volume is up. Shares are up. We were able to bring new customers into the store.”

– Retail Pharmacy Executive



Source: IRI RxPulse™; January – June 2006 vs 2005; Full Year 2006 vs 2005



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MEDICARE PART D CHANNEL SHARE SHIFTS – HEALTHCARE & CPG

Healthcare share changes among 65+ consumers tracked with prescription share, but other CPG products are an untapped opportunity.

As drugstores and supercenters gained share among senior prescription transactions, these retailers were also successful in translating gains at the pharmacy counter to gains across OTC and other healthcare categories.

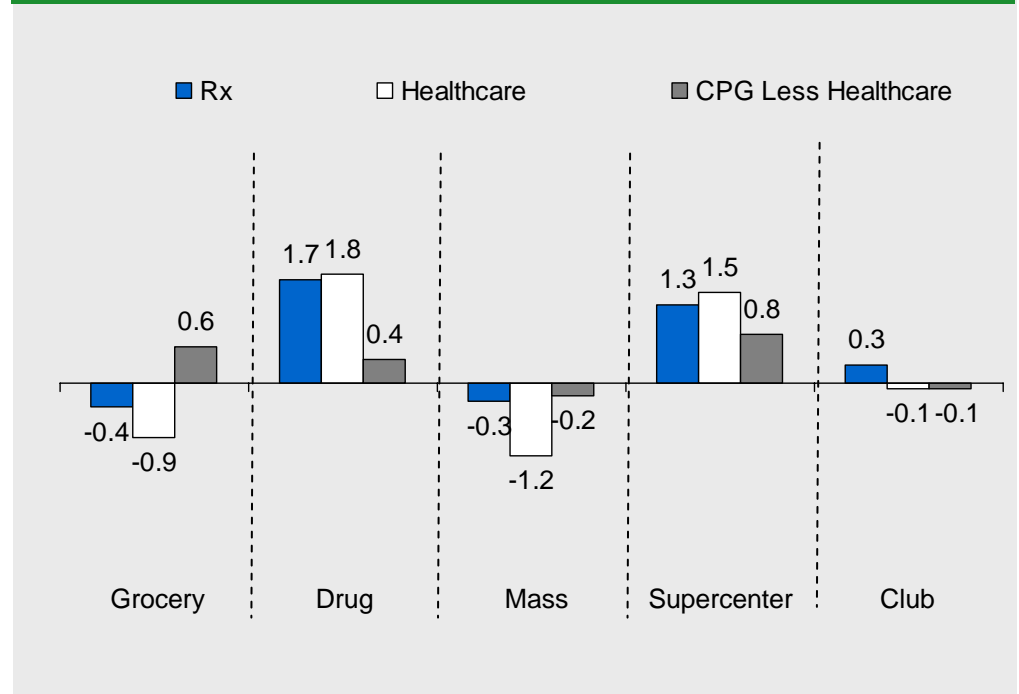
These trends point to the power in linking the pharmacy to related categories.

However, while non-healthcare CPG categories saw modest gains, the full potential for share increases was not realized.

There is a significant opportunity to cross-market and cross-merchandise other high-index senior categories with the pharmacy and other healthcare products to drive increased brand, category and total store sales.

In particular, food and beverages with disease management benefits across high-incidence chronic diseases among seniors, such as diabetes, heart conditions and osteoporosis offer strong tie-in potential.

**Rx Transaction Share/Dollar Share by Channel Among 65+ Consumers
Share Shift vs Prior Year: 12 months Post Medicare Part D**



Source: IRI RxPulse™; January – June 2006 vs 2005; Full Year 2006 vs 2005



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MEDICARE PART D DRIVING TOTAL STORE GROWTH

Medicare Part D and other marketing efforts targeting seniors should include food and beverages with high-demand dietary benefits.

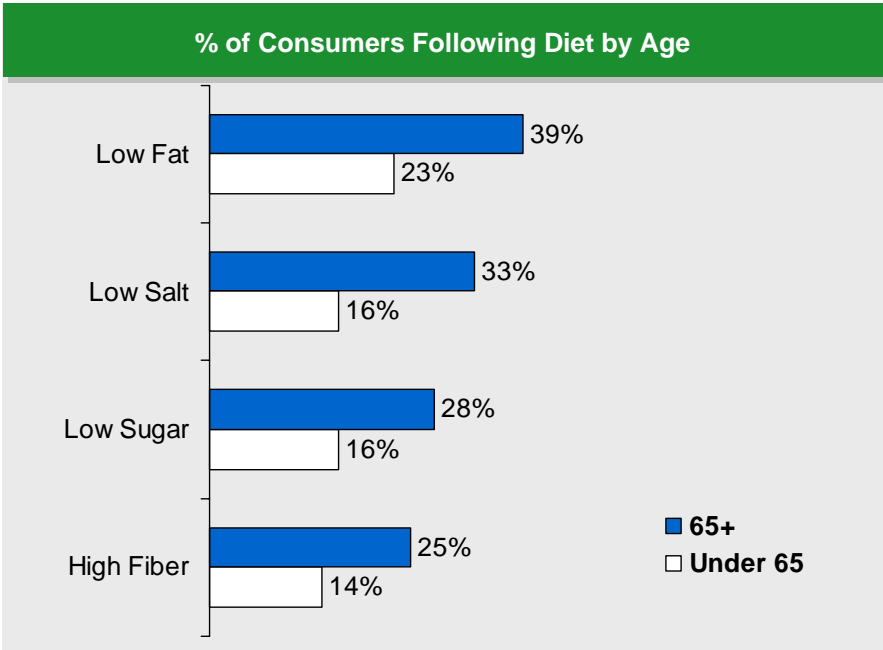
Food and beverages with specific dietary benefits have strong appeal among seniors – many of whom are required to follow special diets to manage chronic health conditions.

These products are ideal candidates for pharmacy-based total store promotions targeting seniors.

Retailers and manufacturers should explore joint development of targeted marketing initiatives, such as direct mailings to senior households with coupons for high-index food and beverages and OTC medications as well as pharmacy savings and information on Medicare Part D

and other health and lifestyle concerns among seniors. Coupons for relevant products throughout the store can be made available at the pharmacy counter or with prescriptions. Multi-category displays within the pharmacy department also offer strong potential.

A recent IRI survey of retail pharmacy executives revealed that linking the pharmacy with the total store is a desired goal but is not common practice today. Making this a reality will require strong manufacturer-retailer collaboration.



Source: IRI MedProfiler VI



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MEDICARE PART D DRIVING TOTAL STORE GROWTH

Senior spending power increased by an estimated \$41 billion as a result of Medicare Part D implementation.

The average Medicare Part D recipient saves \$1,200 annually – resulting in \$41 billion in incremental spending potential among seniors.

It is rare that market potential of this magnitude within a well-defined consumer segment is made available. CPG marketers should explore specific opportunities for their brands and stores to capture a share of this spending potential.

Over the past year, several categories seemed to benefit from these newfound funds, as evidenced

by growth rates among seniors that outpaced total category growth rates. Categories receiving a boost included health and beauty care, such as suntan products and home health care kits as well as both well-developed senior food and beverage categories, such as frozen pot pies and less developed senior categories, such as energy drinks. The learning here is that the opportunity for growth among seniors extends beyond core senior categories.

65+ Consumers
2006 Dollar Sales/1000 HH Change vs Prior Year

	HBC	Food & Beverage
\$1,200 Average Annual Savings	Suntan Products	+14%
	Home Health Care Kits	+13%
	Razor Blades	+8%
	Hair Coloring	+6%
	Eye Cosmetics	+4%
	<u>Strong Senior Categories</u>	
	Fz Pot Pies	+13%
	Rfg Salad Dressing	+10%
	<u>Less-Developed</u>	
	Energy Drinks	+101%
Yogurt	+17%	
Pre-Mixed Cocktails	+16%	
Sports Drinks	+16%	

Source: IRI RxPulse™ 2006 vs 2005; U.S. Department of Health & Human Services



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DISCOUNTED GENERIC DRUGS MARKET OVERVIEW

Discounted generic drugs have become an integral part of the value proposition to lower-income consumers for several major retailers.

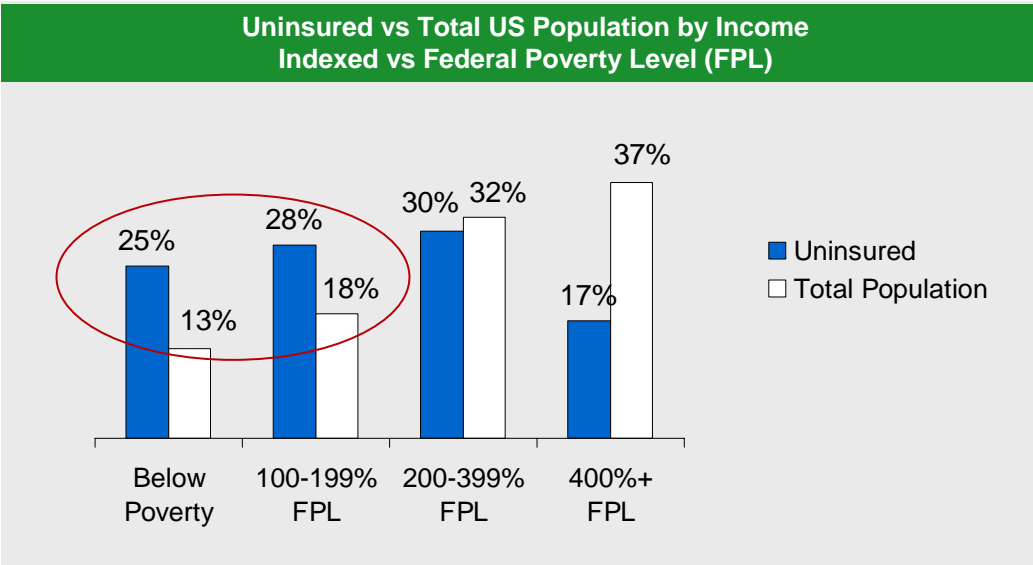
The December issue of *Times & Trends, Emerging Consumer Segments*, highlighted lower-income consumers as a high-potential, underserved segment. As noted in the report, more than one-third of U.S. households earn less than \$35K annually. These consumers struggle to meet their household needs within their budgets.

Many of these consumers are uninsured. As revealed in the chart below, the proportion of uninsured consumers skews lower-income.

Discounted generic drugs have become a key component of several major retailers' initiatives to better serve this segment. While the market for generics is by no means

limited to lower-income consumers, programs offering \$4 generics for a 30-day supply or similar offers (eg. \$9.99 for a 90-day supply) appeal primarily to the 46.6 millions Americans who are uninsured.¹ Insurance co-pays are typically not significantly above these price points, so switching pharmacies to obtain the discounted generics is less likely among insured consumers.

These programs represent cross-marketing and cross-merchandising potential for manufacturers of brands with a high mix of lower-income consumers among their core or target consumer base, as well as growth potential for private label, as heavy private label buyers skew lower-income.



Source: *Overview of the Uninsured in the United States*, Department of Health and Human Services, September 2005



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GENERIC DRUGS IMPACT ON CHANNEL SHARE

Discounted generic drugs have driven share shifts across channels.

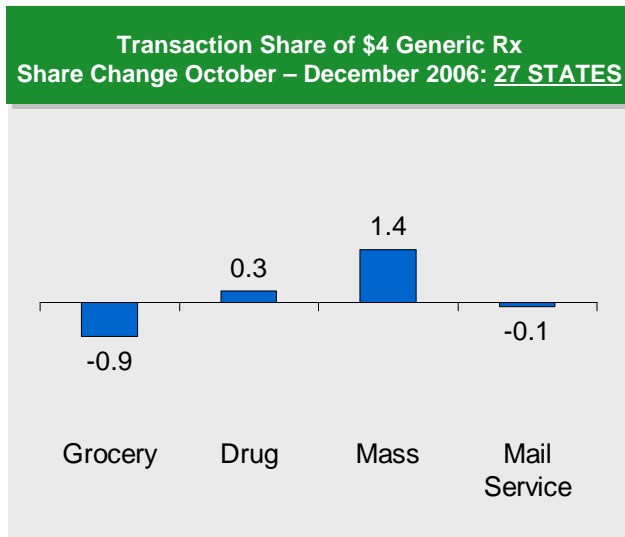
In September 2006, Wal-Mart introduced the \$4 generic drug program in Florida. Eight months later, the program has spread not only throughout Wal-Mart stores across the U.S., but many other retailers have followed suit with similar programs.

While these initiatives are typically limited to 350 or fewer drugs -- a fraction of the generic drugs available -- they are moving the needle.

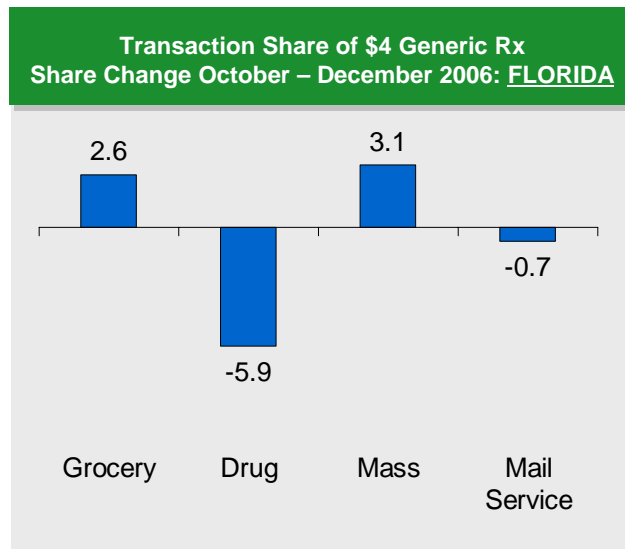
As highlighted in the upper right chart, channel share of generic drugs among states in which retailers had implemented generic drug discounts has shifted towards mass merchandisers, largely at the expense of grocery.

In Florida, where the program has been available for the longest period, the shift towards mass is more pronounced but is sourced primarily from drug stores. A number of major grocery stores now offer discounted generics, but the program has not been widely replicated across the drug channel. As we continue to track the impact of discounted generics, we will determine if the Florida market trends are unique or if the national picture will fall out similarly.

Retailers targeting the lower-income segment, in particular, should explore the return-on-investment for discounted drug programs.



Source: IRI RxPulse™



Source: IRI RxPulse™



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IN-STORE HEALTH CLINICS OVERVIEW

Retail health clinics represent significant growth potential for the pharmacy, OTC remedies and food and beverages with disease management benefits.

Retailers seeking to enhance their health and wellness positioning and to deliver added convenience to their consumers are adding health clinics to their stores in increasing numbers.

While many of these clinics are owned and operated by third parties, CVS's recent acquisition of MinuteClinic, which operates over half of the clinics in the market today, may mark the emergence of a new model.

In addition to driving store traffic, clinics offer strong potential to increase both prescription and other healthcare sales, as the vast majority of consumers receiving a prescription fill it immediately within the retail pharmacy, and over one-third purchase OTC remedies.¹

The types of ailments treated at clinics are relatively mild conditions such as colds, sore throats and rashes that lend themselves to both Rx and OTC treatments, offering new promotion and cross-marketing opportunities for these departments.

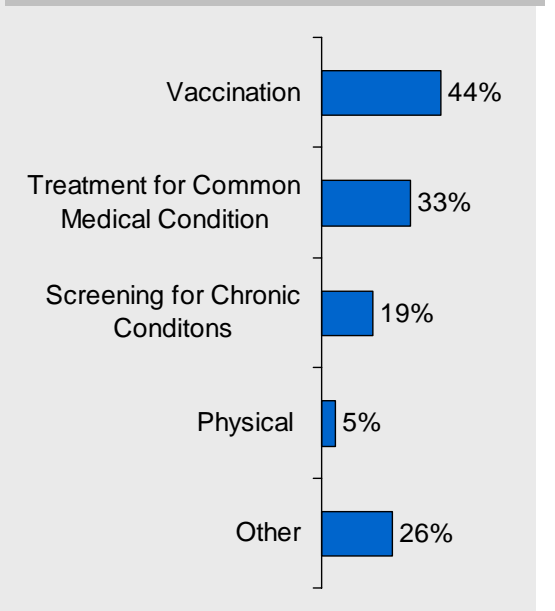
Further, most clinics screen for chronic diseases such as diabetes, heart disease and high blood pressure. As many of these conditions require specific diets, there are tie-in promotional opportunities for food and beverages.

In-Store Health Clinics: Snapshot

- ▶ Roughly 300 clinics today, with the number expected to more than double by year end
- ▶ Typical services include treatment of 10-12 common ailments, screening for chronic disease, vaccinations and physicals (see chart below)
- ▶ Fees average \$50-\$70 (or an insurance co-payment)
- ▶ Patients seen are typically 18 months and older
- ▶ Primarily staffed by nurse practitioners and physician assistants

Source: Convenient Care Association

Types of Medical Services Received at an In-Store Clinic: % of Consumers



Source: Harris Interactive

"..90% of all MinuteClinic patients who receive a prescription fill it in the host pharmacy..38% buy an OTC product as a result of the clinic visit."

– Drug Store News

1. Drug Store News, Fall 2006



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IN-STORE HEALTH CLINICS CONSUMER RESPONSE

Retail clinics target the needs of both budget-conscious and time-starved consumers.

While retail health clinics are clearly in the early developmental stages -- only 5% of consumers in a recent Harris Interactive poll had visited a clinic -- consumers' favorable perceptions of the clinics, combined with the rapidly expanding availability suggest that they are here to stay.

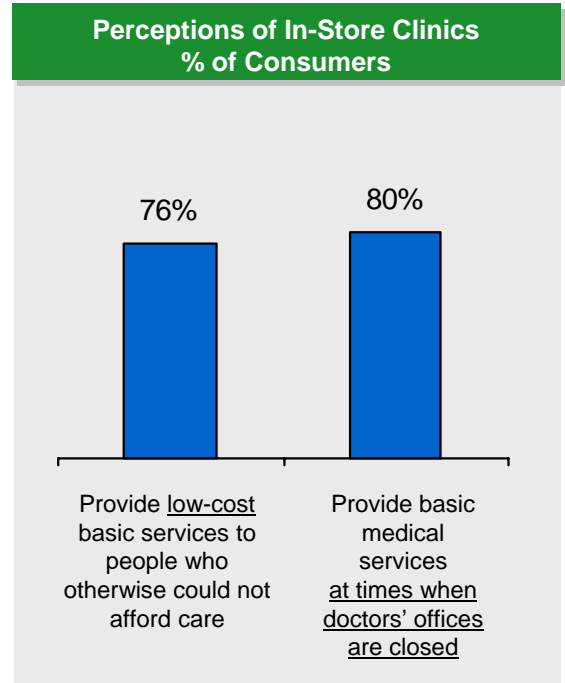
For many consumers, the fact that the hours of clinic operation are typically well beyond that of their doctor's office and that they can immediately and conveniently obtain required medication for treatment is a big draw.

For others who cannot afford the high costs of a doctor's visit, the lower prices (which are typically prominently posted) are the primary draw.

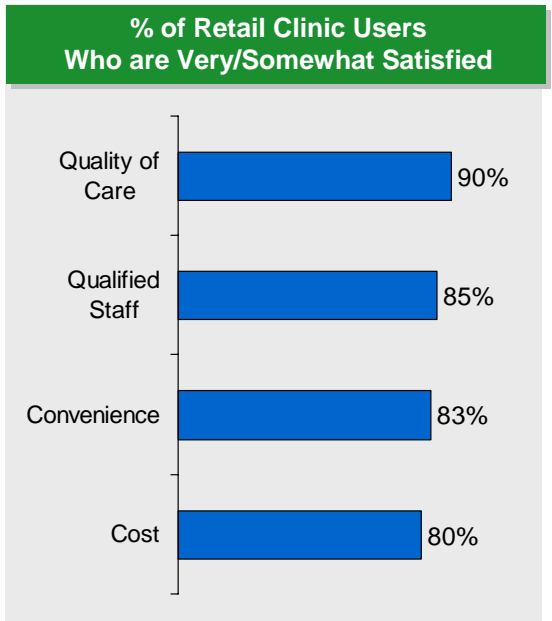
The ability to serve both of these markets effectively is working in the clinics' favor.

Over the next several years, the clinic concept will evolve significantly, as retailers crack the code on fully leveraging these services to grow total store sales and build relationships with consumers.

Manufacturers of Rx, healthcare and food and beverage products with specific health benefits have an opportunity now to get in on the ground floor to develop promotions, displays and cross-marketing that will resonate with clinic patients.



Source: Harris Interactive



Source: Harris Interactive



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HEALTHCARE MARKETING MANUFACTURER-RETAILER COLLABORATION

Retailer-manufacturer collaboration is the key to maximizing healthcare marketing potential.

As discussed throughout this report, while retailers have focused healthcare marketing initiatives primarily on the pharmacy, there is a major opportunity to extend these initiatives to drive brand and category growth throughout the store to deliver total store topline growth.

These results can only be achieved through strong retailer-manufacturer collaboration, which, as outlined below,

will likely fall along a continuum, depending upon each retailers' current initiatives in place and commitment to healthcare marketing.

Manufacturers of Rx, healthcare and health-oriented food and beverages should work closely with each major retail partner to determine the optimal healthcare marketing plan that will benefit the consumer, the brand and the store.

HEALTHCARE MARKETING: RETAILER-MANUFACTURER COLLABORATION

	Brand-Specific Promotions	Segment-Specific Promotions	Ailment-Specific Solutions	Total Health & Wellness
SCOPE	Individual Brand	Brands Targeting Specific Consumer Groups (Eg. Seniors)	Brands with Disease Management Benefits	Brands with Health/Wellness Benefits
MARKETING	Tie-in with General Rx/Healthcare Ads in Circulars and Direct Mail	Tie-In with Med D (Seniors) Tie-in with Generics (Lower - Income)	Tie-In with Ailment-Specific Marketing Campaign (TV, Radio, Circular, Direct Mail)	Health and Wellness Platform Across All Advertising and Marketing Spotighting Specific Brands
IN-STORE	Coupons and Product Information at Pharmacy Checkouts and Clinics	Integrate Brand Shelf Talkers and Signage with Overall In-Store Segment Marketing Plan	Cross-Category Ailment-Specific Displays	Signage Throughout the Store; Health Information Kiosks; Store Tours

TOTAL STORE GROWTH POTENTIAL →



CONCLUSIONS

CPG MANUFACTURERS

To drive brand growth through collaborative healthcare marketing, Rx, healthcare and health-oriented food and beverage manufacturers should consider the following action items:

Build Retailer-Specific Go-to-Market Plans

Build retailer-specific go-to-market plans for each major retail partner to capture “best available” market potential, depending upon the retailer’s current initiatives and commitment to healthcare marketing (see healthcare marketing continuum on page 16)

- ▶ Develop brand-specific pharmacy or health clinic tie-ins where retailer-driven programs are not in place
- ▶ Tap into or collaboratively build larger-scale healthcare marketing programs
 - Segment-specific: eg. Medicare Part D targeting seniors
 - Ailment-specific: eg. diabetes, heart health, cholesterol
 - Total health and wellness

Develop Healthcare-Based Brand Marketing and Merchandising

Integrate brand marketing and merchandising within existing retailer healthcare initiatives or collaboratively create new plans, including the following:

- ▶ Brand coupons available at the health clinic and pharmacy counter and distributed with relevant prescriptions
- ▶ Secondary displays within the pharmacy or health clinic areas
- ▶ Shelf talkers linking the brand to specific ailments and to the pharmacy, health clinic or general health and wellness program
- ▶ Brand coupons or product information within pharmacy, health clinic or general health and wellness ads (circular, direct mail, etc.)
- ▶ Brand information and disease management benefits featured in health-oriented information kiosks

Measure and Monitor

- ▶ Measure brand performance across stores with the program vs stores without; Identify brand contribution to program success



CONCLUSIONS RETAILERS

To drive total store growth through collaborative healthcare marketing, retailers should consider the following action items:

Develop a Comprehensive Healthcare Marketing Strategy

- ▶ Identify the feasible scope of healthcare marketing for your stores (eg. targeting specific ailments or consumer segments vs a total health and wellness umbrella with multi-faceted campaign)
- ▶ Consider a phased approach to test the waters and build on successes (see healthcare marketing continuum on page 16)
- ▶ Leverage the pharmacy as the healthcare “hub”, linking the pharmacy with healthcare and health-oriented food and beverages throughout the store, and with in-store health clinics (see below for thought-starters)
- ▶ Version the strategy by store or store cluster to reflect differences in consumer mix (demographics, ailments, shopping patterns, etc.)
- ▶ Identify high-potential categories and manufacturer partners within each to collaborate with in program development and implementation

Develop Integrated Healthcare Marketing and Merchandising

Develop fully integrated marketing and merchandising plans including Rx, OTC and health-oriented food and beverage categories to include the following (thought-starters):

- ▶ Health and wellness positioning reflected in all marketing communications and supported in-store with signage, displays, and sampling
- ▶ Brand coupons available at the health clinic and pharmacy counter and distributed with relevant prescriptions
- ▶ Secondary displays within the pharmacy or health clinic areas
- ▶ Shelf talkers linking brands to specific ailments and to the pharmacy, health clinic or general health and wellness program
- ▶ Brand coupons or product information within pharmacy, health clinic or general health and wellness ads (circular, direct mail, etc.)
- ▶ Brand information and disease management benefits featured in health-oriented information kiosks

Measure and Monitor

- ▶ Track performance across participating categories, brands, consumer segments and total store



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RESOURCES

To gain insight into collaborative healthcare marketing opportunities across specific brands, categories, consumer segments, channels or retailers, contact your IRI client service representative regarding custom analyses leveraging the following resources:

IRI RxPulse™

Integrated longitudinal Rx and OTC panel of over 34,000 individual patient/consumers in over 15,000 households providing perspectives on demographics, lifestyles and ailments. The service provides a means to monitor total Rx & OTC drug usage as well as CPG purchases on an ongoing basis across key segments.

IRI MedProfiler Health & Wellness Survey

Annual syndicated survey of healthcare attitudes and conditions; enables the creation of custom target groups that can be used to track purchases across specific attitudinal/condition segments.

IRI Healthcare Report: Leveraging Healthcare as a New Platform for Total Store Growth

The IRI Healthcare Report provides an in-depth analysis of current retail healthcare marketing practices and their impact on category and store sales and consumer shopping and purchase behavior. The report integrates insights from numerous sources including IRI RxPulse™, retail healthcare executive interviews, primary consumer research and extensive secondary research.

This unique report identifies best practices and critical action items required to leverage collaborative healthcare marketing to convert pharmacy shoppers to total store shoppers and drive total store sales growth.

To order the report or for additional information, please contact:

Sean Seitzinger
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MORE INFORMATION

Please contact Sheila McCusker at sheila.mccusker@infores.com with questions or comments about this report.

ABOUT IRI

Information Resources, Inc. (IRI) is the world's leading provider of enterprise market information solutions and services, empowering its clients to grow their business profitably in a complex marketplace. Driving the transformation of the consumer packaged goods (CPG), retail and healthcare industries, only IRI provides a unique combination of real-time market content, advanced analytics, enterprise performance management software and professional services. The company's portfolio of services, solutions and technology enable leading retailers and their suppliers around the globe to see what they are missing, act faster and with greater confidence and win at the shelf. Ninety-five percent of the FORTUNE Global 500 in CPG and retail leverage IRI to power their business. For more information, visit www.infores.com.



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