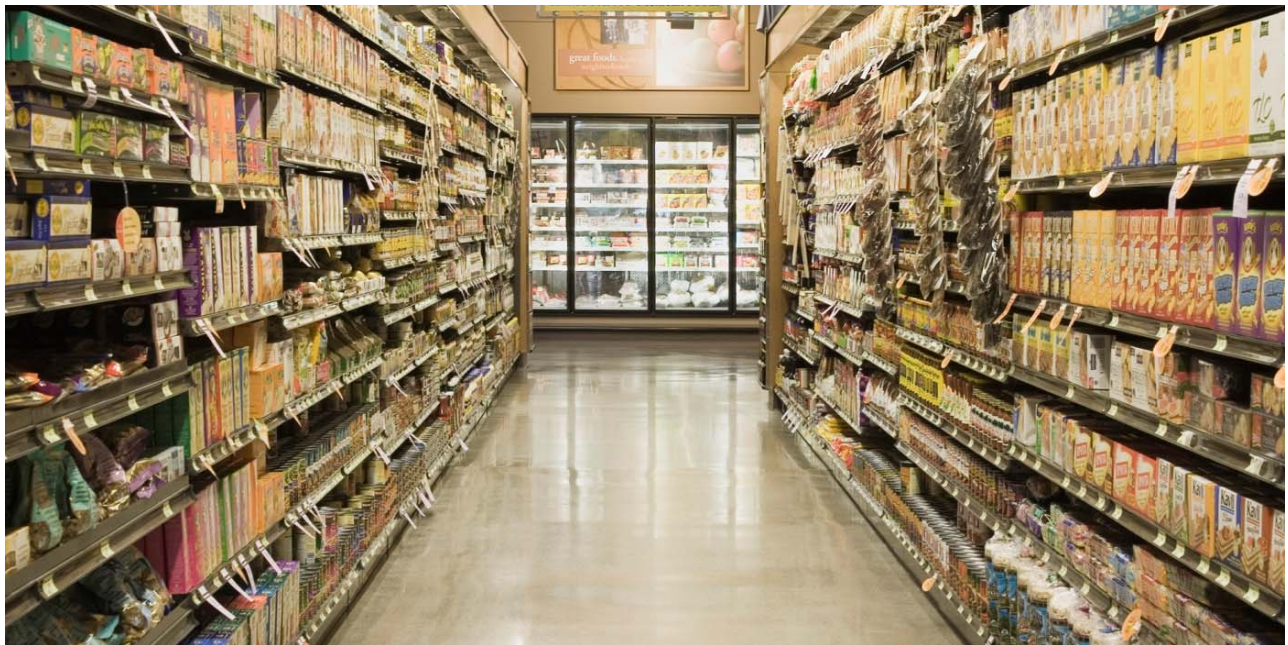


# TIMES & TRENDS

A Snapshot of Trends Shaping the CPG Industry

## CPG MERCHANDISING TRENDS 2007

NEW STRATEGIES FOR A NEW RETAIL ENVIRONMENT



### August 2007

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## EXECUTIVE SUMMARY

- ▶ As traditional advertising loses its efficacy, CPG manufacturers are increasingly turning to in-store marketing; despite a growing importance, however, merchandising activity and effectiveness are both on the decline
- ▶ Retailer efforts to enhance the shopping experience have led to “clean floor” policies that restrict the number, size and characteristics of displays; indicative of this general trend, the number of grocery store displays is down nearly 10% in just two years
- ▶ Nearly three-quarters of CPG categories experienced a reduction in the average lift achieved through merchandising as “prime” merchandising opportunities become more limited; manufacturers will more actively experiment with new in-store vehicles, such as digital signage and in-store TV and will step up merchandising testing and monitoring to counter this trend
- ▶ Although many retailers’ differentiation strategies have included an increased focus on private label, private label products have experienced comparable reductions in merchandising activity levels relative to branded products
- ▶ Merchandising will evolve to become more strategic than tactical and will require closer collaboration between manufacturers and retailers; expect to see more sophisticated trip-based merchandising, solutions merchandising and educational merchandising



## INTRODUCTION

**New merchandising strategies are required for a new retail environment.**

The collision of two conflicting trends is ushering in a new era of merchandising.

As retailers increasingly seek to brand the shopping experience and provide a clutter-free shopping environment, many are dramatically reducing displays and store signage.

At the same time, manufacturers are increasingly turning to in-store marketing as media fragmentation drives down the efficacy of traditional advertising vehicles.

Where does that leave us? For now, somewhat in limbo. Merchandising activity is down, despite growing manufacturer demand, and new approaches to merchandising have yet to take hold on a broad scale.

This period of transition should be somewhat short-lived, however, as the need for a solution is becoming urgent, and both manufacturers and retailers are recognizing the need to partner to effect change.

Manufacturers are experimenting with emerging in-store marketing vehicles, such as TV networks and digital signage, and are working with retail partners to develop more strategic, trip-based merchandising plans that further retail growth strategies while boosting brand sales.

In addition, retailers are making advances in developing consumer-focused merchandising that is aligned with new experiential strategies. Retailers are increasingly leveraging the value of the store as a medium and are putting systems in place to harness that value.

This report provides insight into current and emerging merchandising trends to provide CPG manufacturers and retailers a framework in which to develop new merchandising strategies for a new retail environment.



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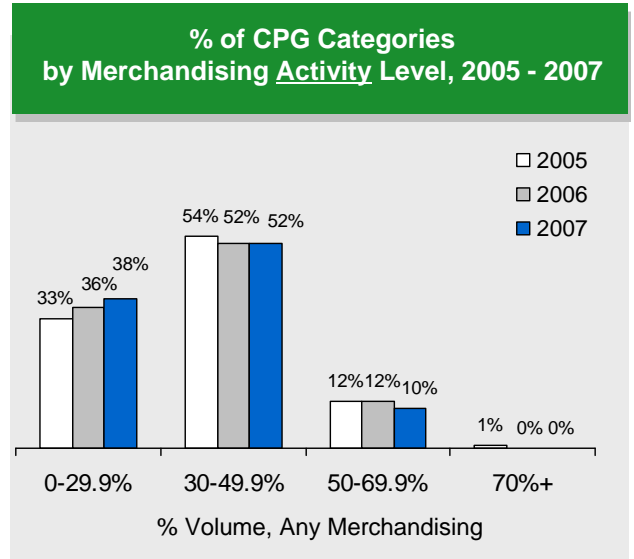
## MERCHANDISING ACTIVITY TOTAL CPG TRENDS

**A slow, gradual decline in total merchandising activity is indicative of the underlying merchandising transformation.**

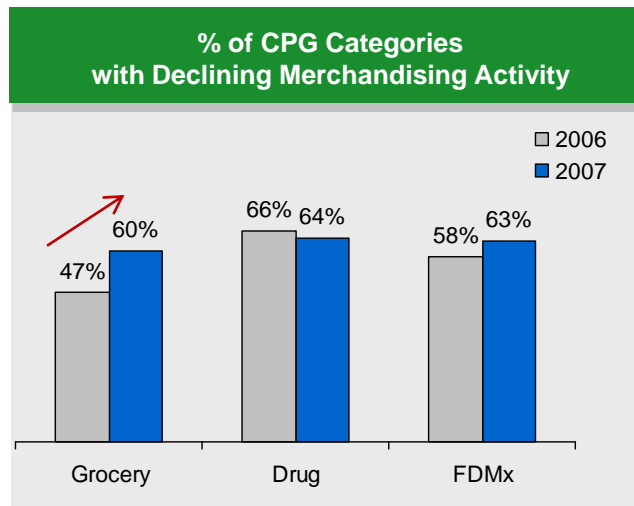
The result of retailers' drive to unclutter stores, combined with manufacturers' drive to bring marketing closer to the consumer via stepped-up in-store marketing is a slow, gradual decline in traditional merchandising activity (as defined as displays, feature ads, feature and display combined and price reductions alone.)

As highlighted in the top chart, the proportion of CPG categories in which less than 30% of volume is supported by merchandising has steadily increased over the past three years. Further, over the past year, as detailed in the bottom chart, the percentage of categories in which merchandising activity declined in the grocery channel jumped from 47% to 60% -- illustrating the extent to which this phenomenon has spread across categories.

Merchandising is by no means dead. 30% or more of volume sold was supported by merchandising in the majority of categories. However, the evolution of merchandising is undeniable. Change is underway, and manufacturers and retailers need to jointly build new approaches to maximize growth within this dynamic environment.



Sources: IRI InfoScan® Reviews, FDMx  
52 weeks ending 6/17/07



Sources: IRI InfoScan® Reviews,  
52 weeks ending 6/17/07 and prior year



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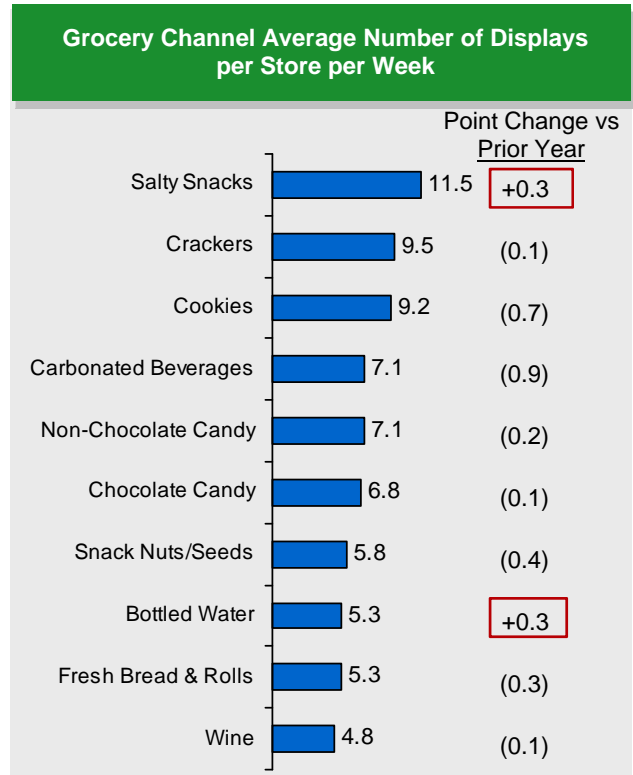
## MERCHANDISING ACTIVITY CHANNEL - GROCERY

**The number of grocery displays is down nearly 10% in just two years as “clean floor” policies take hold.**

The number of displays in grocery stores continues to decline as “clean-floor” policies and a greater focus on fresh foods take hold. At mid-year, displays were down 4.4% versus last year and 9.1% versus two years ago.

Even the most heavily-displayed, expandable consumable categories have been hit by this trend, with eight of the top ten experiencing declines this year. Salty snacks and bottled water held onto displays.

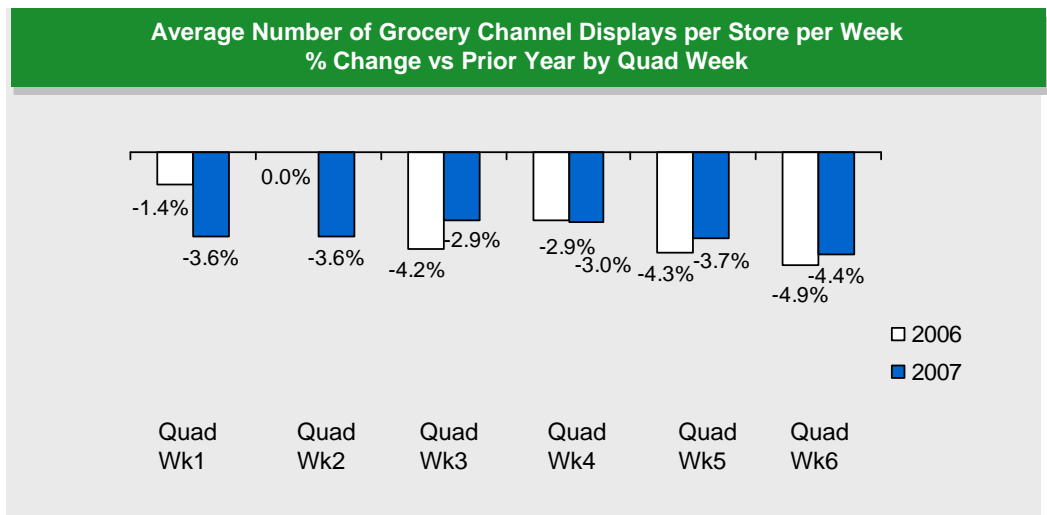
As grocers continue to transform the shopping environment, display availability will continue to shrink, and retailers will increasingly tie display opportunities to overall store growth strategies.



Source: IRI In-Store Solutions Group Perimeter View YTD thru 6/17/07

**“Unless CPG marketers find new ways to re-establish relevance in stores where fresh, prepared foods reign supreme, they will find their products shunted to the least desirable section of the store, doomed to minimal in-store exposure and lethargic turnover.”**

– In-Store Marketing Institute



Source: IRI In-Store Solutions Group Perimeter View



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## MERCHANDISING ACTIVITY CATEGORY – MOST ACTIVE

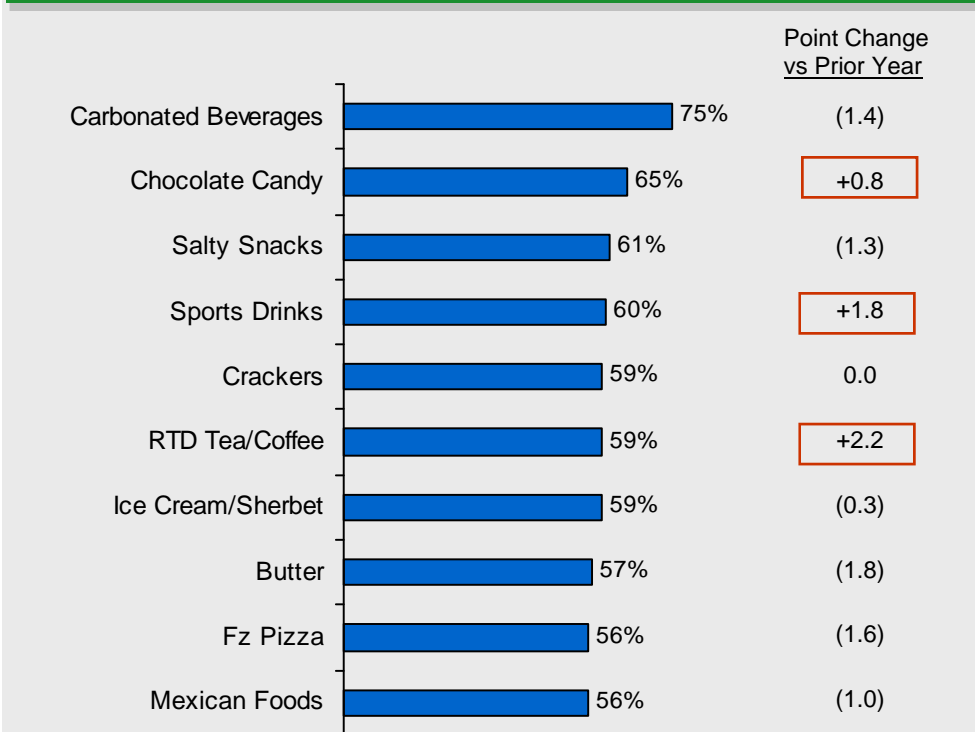
**Heavily-merchandised snack and beverage categories have the most to lose as merchandising opportunities dwindle.**

Seven of the top ten most heavily-merchandised categories are snack foods and beverages. Well-suited to stock-up and often discretionary in nature, these categories have heavily relied on merchandising to stimulate sales and generate awareness of new products.

These highly-active categories have the most to lose as merchandising opportunities continue to dwindle, and merchandising activity is already down in several.

As a result, we can expect manufacturers within these categories to lead the charge in merchandising innovation and the pursuit of alternative tactics to drive sales lift. For instance, several major players are turning to packaging as a form of advertising and a means to standing out on the shelf. Pepsi, for example, is experimenting with a new Mountain Dew bottle whose graphics will change every few weeks.<sup>1</sup>

### Top 10 CPG Categories by Merchandising Activity Level Food, Drug, Mass Channels (Excluding Wal-Mart) % Volume, Any Merchandising



Source: IRI InfoScan® Reviews; 52 weeks ending 6/17/07; Among Top 100 Categories

1. *New York Times*, 8/10/07



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**Category dynamics and fit with emerging retailer strategies influenced category-level merchandising shifts.**

## MERCHANDISING ACTIVITY CATEGORY - TRENDS

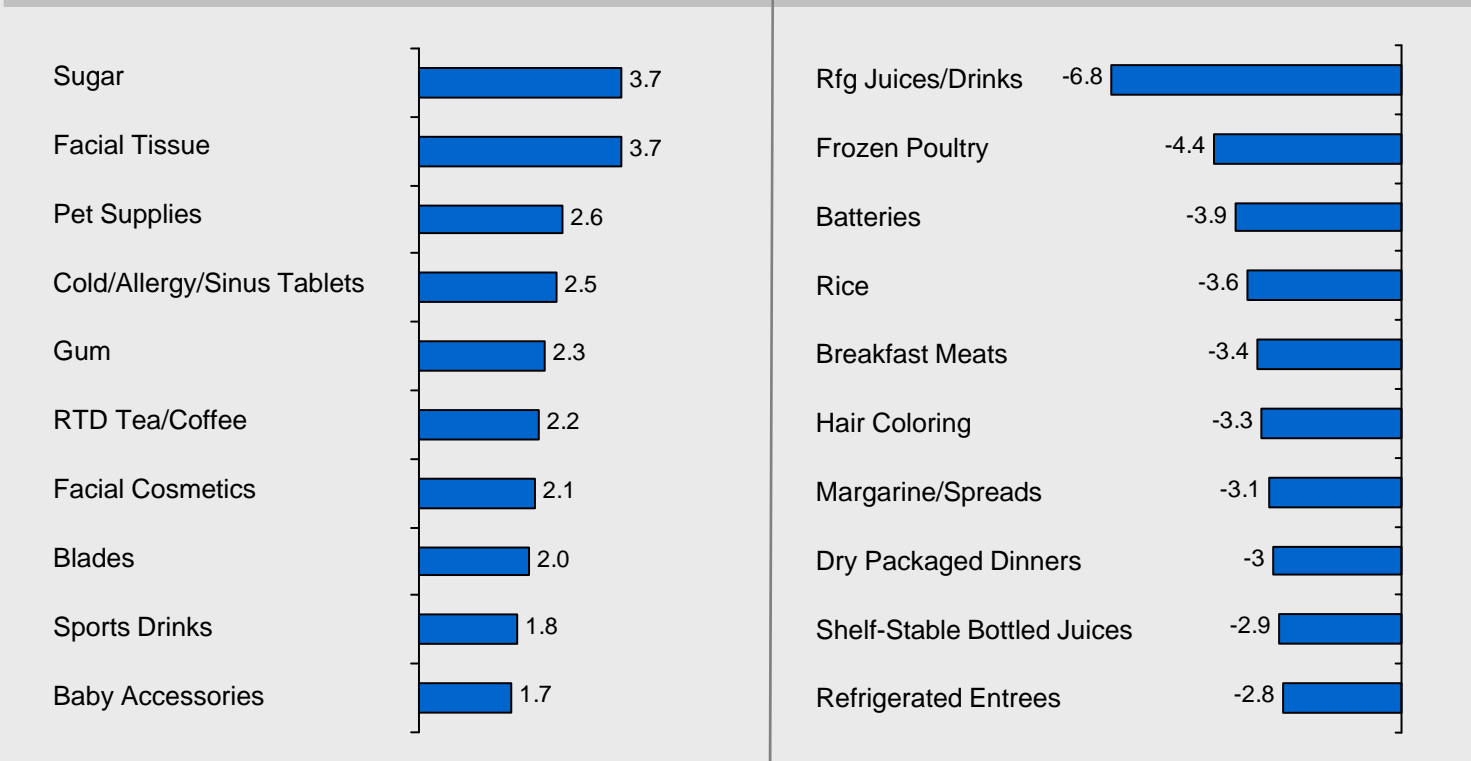
While overall trends point to a slow, gradual decline in merchandising activity, individual category dynamics, such as consumer demand growth and new product activity, as well as fit with evolving retail strategies affect category impact.

As noted below, several categories saw sizable increases in merchandising activity last year. Retailers stepped up merchandising to capture a greater share of high-growth categories, such as ready-to-drink tea/coffee and sports drinks, while also increasing

merchandising support among categories experiencing intense cross-channel competition, such as facial tissue and cold/allergy/sinus tablets.

Among categories with the largest merchandising declines, “center of the plate” products, such as refrigerated entrees, comprised four of the top ten. These categories are likely seeing less merchandising focus as retailers increasingly focus on prepared foods.

**CPG Categories with the Largest Increases/Decreases in Merchandising Activity Levels  
Food, Drug, Mass Channels (Excluding Wal-Mart)  
% Volume, Any Merchandising: Point Change vs Prior Year**



Source: IRI InfoScan® Reviews; 52 weeks ending 6/17/07; Among Top 100 Categories



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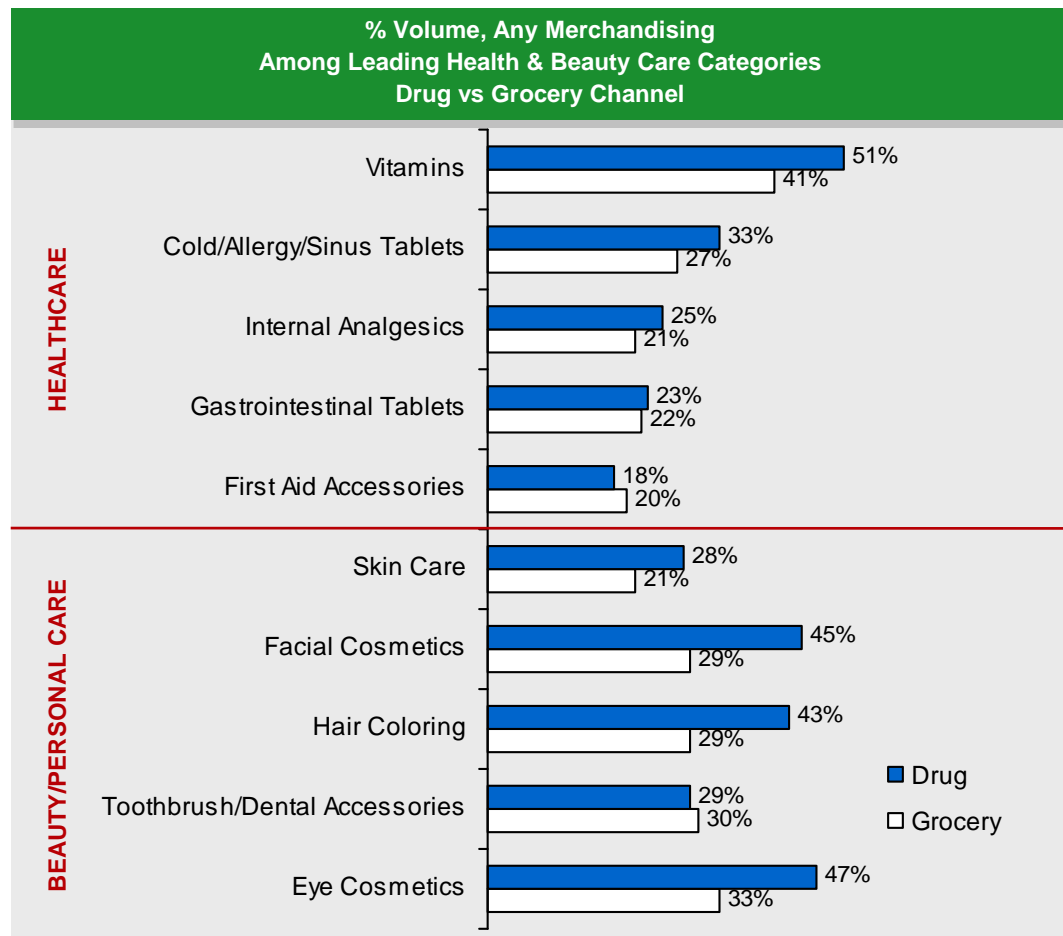
## MERCHANDISING ACTIVITY CATEGORY - HBC

**Strategic merchandising has played a role in drug stores' ability to gain HBC share.**

As outlined in the July 2007 Channel Migration issue of *Times & Trends*, health and beauty care categories are often at the center of cross-channel battles for consumer spending. Over the past year, drug stores have emerged as health and beauty care destinations, winning share from competing channels – particularly grocery.

Merchandising has played an important role in drug stores' success. Across many leading categories, drug stores significantly

outpace grocery stores in merchandising activity levels, per chart below. But, drug stores are also taking a more strategic approach to HBC merchandising, tying into total health & wellness marketing initiatives that cross the store. As competing retailers embark upon similar programs, HBC manufacturers may be shielded somewhat from overall merchandising declines – provided that their brands are aligned with retail partner strategies.



Source: IRI InfoScan® Reviews; 52 weeks ending 6/17/07



# TIMES & TRENDS

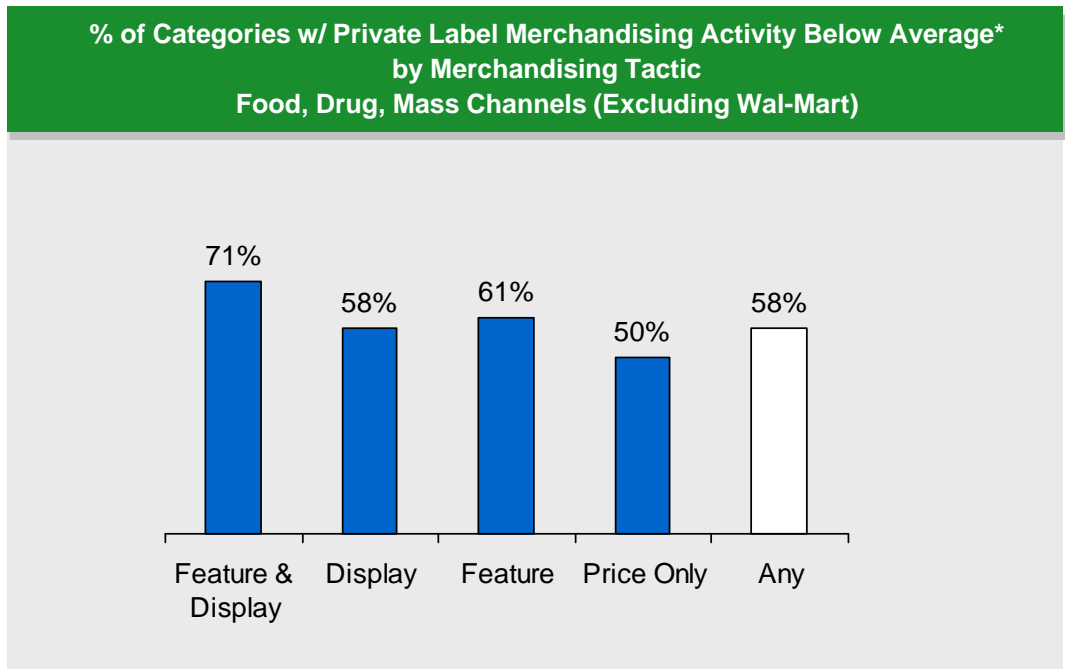
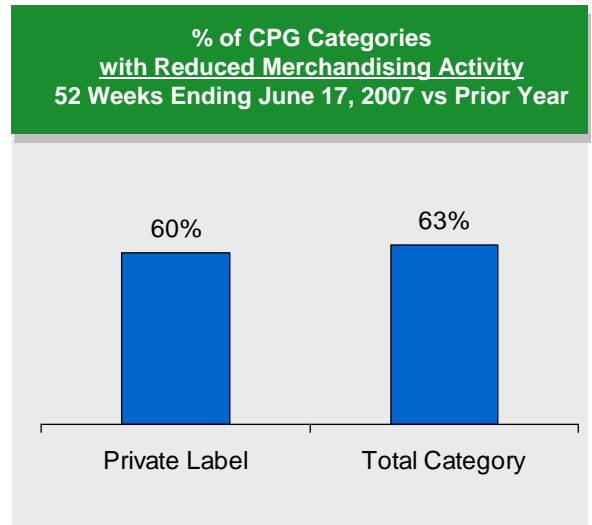
A Snapshot of Trends Shaping the CPG Industry

## MERCHANDISING ACTIVITY CATEGORY – PRIVATE LABEL

**Private label has been subjected to the same merchandising activity declines as branded products.**

As many retailers have stepped up focus on private label as a key element in differentiation strategies, it may be expected that private label merchandising would be on the rise, replacing branded product merchandising.

That is not the case, however. While there are variances across categories, in aggregate, private label has been subjected to the same declining activity trend evident at the total category level and, in fact, private label merchandising activity falls below category averages across tactics in a majority of categories.



Sources: IRI InfoScan® Reviews, FDMx; 52 weeks ending 6/17/07

\*Note: Based on % volume, any merchandising for total category vs private label



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## MERCHANDISING EFFECTIVENESS TOTAL CPG TRENDS

**Across most categories, the volume lift achieved through merchandising support is diminishing.**

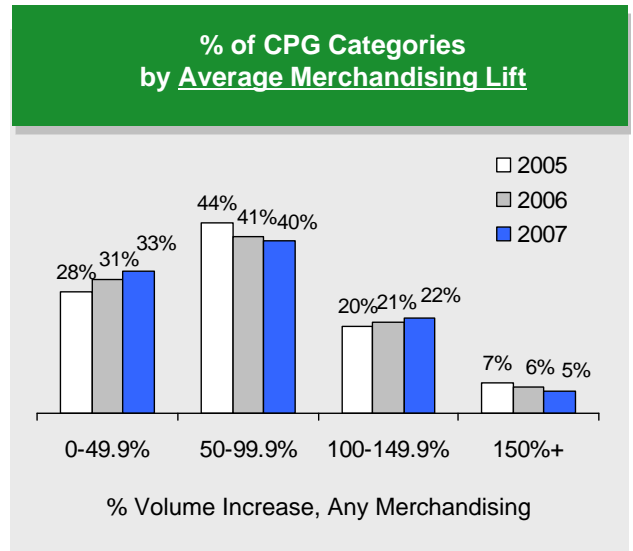
There is no question that merchandising support continues to drive significant volume. Among two-thirds of CPG categories, average volume increases from merchandising support are 50% or higher.

What is a bit alarming, however, is the fact that merchandising lift is slowly deteriorating. Within FDMx channels, nearly three-quarters of CPG categories experienced a reduction in the average volume lift achieved through merchandising versus last year. As highlighted in the bottom chart, drug stores fared a bit better, but a majority of categories still experienced lower lifts.

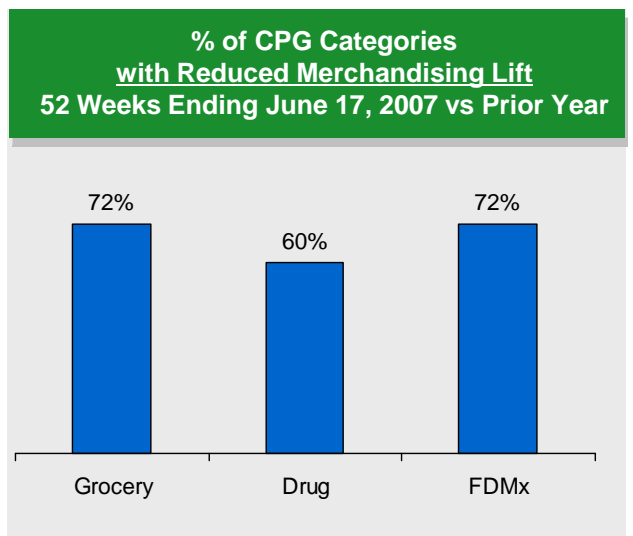
At a time when merchandising opportunity is becoming increasingly limited, each merchandising execution needs to deliver more, not less.

These trends further support the need for merchandising reform – for a more strategic, consumer-centric approach to merchandising, as isolated tactics are losing their steam.

In addition, manufacturers will likely invest in more pre-rollout testing of merchandising programs and will more closely track retail execution and consumer response.



Sources: IRI InfoScan® Reviews, FDMx  
52 weeks ending 6/17/07



Sources: IRI InfoScan® Reviews,  
52 weeks ending 6/17/07



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## MERCHANDISING EFFECTIVENESS LEADING CATEGORIES

**Merchandising activity is declining among half of the top ten categories with the highest lift.**

While merchandising effectiveness is down across a broad range of categories, several others continue to earn big sales gains.

Consumers respond particularly well to merchandising activity across the categories below.

These categories are all shelf-stable, enabling advanced purchase and stock-up and/or are relatively high-ticket items such as breakfast meats and butter for which consumers tend to more actively seek deals.

Despite the efficacy of merchandising across these categories, and the fact that most do not have exceptionally high merchandising activity levels, activity is down in five of the top ten. This trend underscores the extent to which new retailer strategies (ie focus on “clean floors” and fresh foods) are impacting CPG merchandising opportunity.

### Top 10 CPG Categories by Merchandising Lift Food, Drug, Mass Channels (Excluding Wal-Mart) % Volume Increase, Any Merchandising

	<u>% Volume Increase w/Merchandising Support</u>	<u>% Volume w/Merch</u>	<u>Change in % Volume w/ Merch</u>
Paper Towels	232%	53%	0
Toilet Tissue	226%	51%	(0.6)
Shelf-Stable Seafood	192%	42%	(1.9)
Breakfast Meats	185%	52%	(3.4)
Chocolate Candy	178%	65%	+0.8
Laundry Detergent	172%	52%	+0.5
Butter	172%	57%	(1.8)
Frankfurters	164%	53%	(1.3)
Vegetables	158%	45%	(0.4)
Coffee	157%	49%	+1.1

Source: IRI InfoScan® Reviews; 52 weeks ending 6/17/2007 and same period prior year; Among Top 100 Categories



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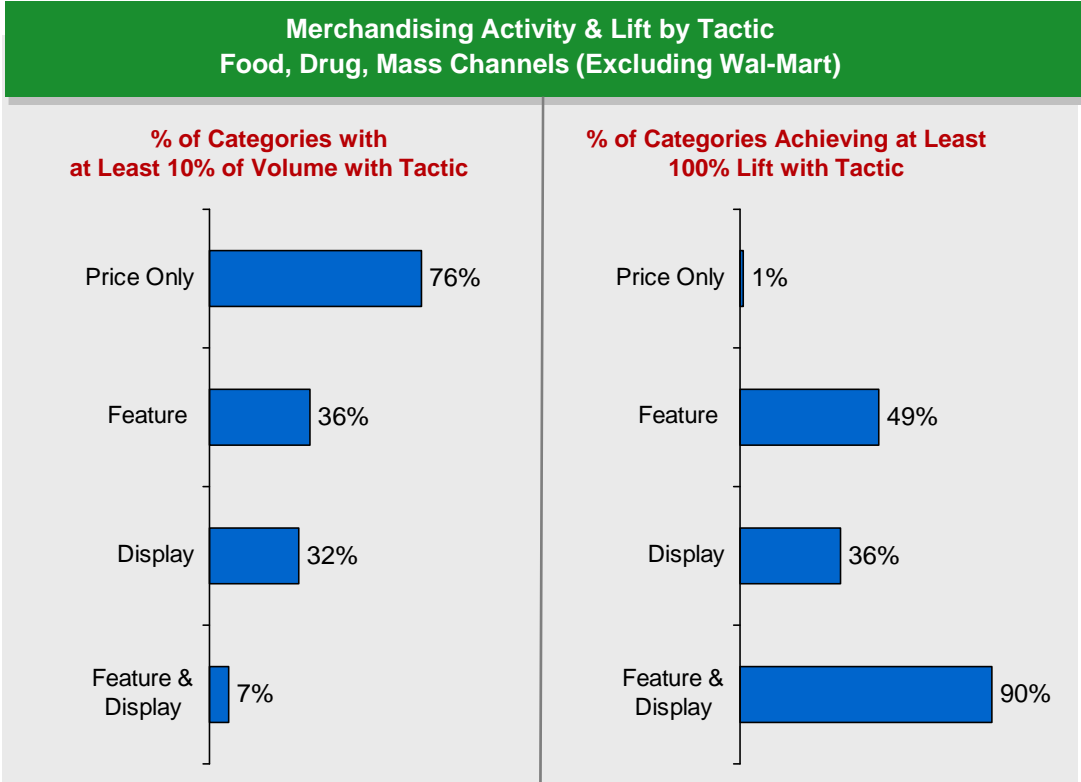
## MERCHANDISING TACTICS PREVALENCE & EFFECTIVENESS

**The most effective tactics are the least prevalent.**

While displays supported by feature ads are a rare occurrence, manufacturers lobby hard for this level of merchandising support...and for good reason. Average lift is 100% or greater, on average, across a majority of categories when feature and display ads are combined.

By contrast, price reductions with no display or feature ad support are far more prevalent, but are far less effective in driving lift for most categories.

Somewhere in the middle are feature ads and displays. Both deliver solid lift, but both will be less available as retailer image-based strategies gain more traction. That means heightened competition for a shrinking opportunity and a more stringent selection process among retailers.



Sources: IRI InfoScan® Reviews, FDMx; 52 weeks ending 6/17/07



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## MERCHANDISING TACTICS EFFECTIVENESS – TOP CATEGORIES

**Price reductions alone do play an important role for categories less-suited to feature ads and displays.**

Most high-response categories, such as paper towels and shelf-stable seafood do well across merchandising tactics, landing among the categories with the highest lift for feature & display combined or individually.

These categories have the power to bring consumers into the store, as evidenced by the strong response to feature ads, and the ability to build baskets once consumers are in the store, given their exceptionally high lift achieved through display.

As retailers refine merchandising strategies to align with overall store growth strategies, the performance of these categories should be key considerations.

Further, while price reductions alone deliver the lowest lift, on average, when compared with other tactics, they do play an important role for refrigerated and frozen categories that do not lend themselves easily to display, and to impulse categories, such as chocolate candy that are less frequently promoted in feature ads.

### Categories Achieving the Highest Lift by Merchandising Tactic

<u>Feature &amp; Display</u>		<u>Display</u>		<u>Feature</u>		<u>Price Only</u>	
Shelf-Stable Seafood	987%	Toilet Tissue	233%	Shelf-Stable Seafood	294%	Chocolate Candy	118%
Paper Towels	814%	Chocolate Candy	202%	Toilet Tissue	281%	Breakfast Meats	96%
Toilet Tissue	737%	Paper Towels	201%	Paper Towels	265%	Frankfurters	91%
Breakfast Meats	718%	Shelf-Stable Seafood	189%	Breakfast Meat	250%	Butter	81%
Canned/Bottled Fruit	629%	Canned/Bottled Fruit	186%	Butter	244%	Luncheon Meats	79%

Sources: IRI InfoScan® Reviews, FDMx; 52 weeks ending 6/17/07; Among top 100 categories.



### TRENDS TO WATCH

As highlighted throughout this report, conflicting market forces are driving a need for merchandising change.

Over the next few years, the following trends will likely play a major role in shaping the next era in CPG merchandising:

#### Clean-Floor Policies Prevail

In an effort to enhance consumers' shopping experiences and create a clean, uncluttered environment, a growing number of retailers are instituting "clean floor" policies that place restrictions on the number, size, configuration and look of displays. The impact of these policies (combined with other factors, such as a shifting focus to fresh foods) on available displays has been dramatic, as demonstrated by the grocery display trends presented on page 5.

And the trend is not limited to grocery. Beginning in 2005, Wal-Mart implemented shifts in merchandising strategy to improve the shopping environment, including a significant drop in the number of merchandising strips, followed by a major reduction in the number of secondary front perimeter displays in 2006.<sup>1</sup>

As there are no signs that this trend is reversing, manufacturers – many of whom have recently stepped up in-store marketing to get closer to consumers– must now explore new in-store marketing opportunities.

**Merchandising will be a critical vehicle in advancing retailer strategies to own specific shopping trips.**

#### Trip-Based Merchandising Delivers a New Avenue to Growth

As detailed in the June 2007 issue of *Times & Trends*, through new advances in shopper insights, retailers are able to identify high-potential shopping trips (ie quick trips for perishables or special purpose trips for party planning or full pantry stocking trips, etc) and specifically target them through marketing, merchandising and assortment. Trip-based strategies offer a promising new avenue to growth.

Expect changes in merchandising as this new level of consumer understanding is leveraged. For instance, retailers targeting quick trips may move secondary displays of high-index quick trip categories (such as milk, bread, etc) to the front of the store. Retailers targeting special purpose trips may build multi-category displays featuring wine, cheese, nuts, and other party essentials. In addition, retailers will be working more closely with manufacturers to understand the trip mix and cross-purchasing behavior for specific categories in order to design optimal promotions, which will vary depending upon the specific trip mix for each category.

1. In-Store Marketing Institute



## TRENDS TO WATCH (CONT'D)

**Merchandising will increasingly be leveraged to offer consumers solutions, not just products or price points.**

### **Retailers and Manufacturers Partner to Deliver Solutions**

Retailers and manufacturers are recognizing the power of leveraging merchandising to offer solutions to consumers, not just individual products or price points. Cross-merchandising related products, whether meal ingredients or items needed to tend to a cold or spring cleaning products, not only makes shopping easier for consumers, it also drives incremental sales.

For instance, Fresh Express works with retailers to sell multi-product meal solutions, such as Albertson's Meal Deals, which offers deals on convenient entrees, side dishes and beverages. Thirty national brands have been involved with this program, which has driven strong growth for participating brands. (See case study on next page for more detail.)

### **Sustainability Has Far-Reaching Impact**

Sustainability -- meeting the needs of today without compromising the ability of future generations to meet their own needs -- has evolved from buzzword to guiding business principle with the power to literally reshape nearly every aspect of the CPG and retail industries, from product development to distribution to marketing and merchandising.

While we remain in the early stages of market impact, we are already seeing changes that provide a glimpse into future practices. For instance, there is growing demand for less material and recyclable material used in displays. In addition, as packages become more environmentally friendly, they will shrink in size (as laundry detergent packages are already doing, for instance), creating more shelf space but less package area with which to promote a product.

Further, per discussion below, there will be an increased educational need to explain sustainability benefits, particularly among products that have become concentrated, as value perceptions may be altered, and usage requirements will change. This will create a need for educational store signage.



## SOLUTION MERCHANDISING CASE STUDY MULTI-CATEGORY MEAL SOLUTIONS

### Case Study: Fresh Express Partners with Key Retailers and Manufacturers to Deliver Meal Solutions

**Fresh Express multi-category meal solutions promotions deliver sizable gains for participating retailers and manufacturers.**

#### BACKGROUND

- ▶ In response to a growing consumer demand for quick, easy, healthy meals and ongoing competition from quick service and casual dining restaurants, retailers are increasingly offering meal solutions
- ▶ While retailer meal solution focus to date has been centered around prepared foods, packaged foods have enormous potential to fill this need when grouped appropriately, offering consumers flexibility and variety
- ▶ Half of shopping trips are “quick trips”, in which consumers want to pick up a few items and get in and out of the store quickly; however, most retail outlets do not cater directly to this need, leaving retailers vulnerable to current and emerging competition

#### SOLUTION

- ▶ Fresh Express, a leading manufacturer of ready-to-eat salads, developed a multi-category promotion that was implemented across key retail partners, including Albertsons and HEB to address the need for meal solutions and enable consumers to quickly locate everything they need
- ▶ Promotions feature bundled discounts on convenient entrees, side dishes and beverages; 30 national brands have participated
- ▶ Products are offered together in refrigerated displays at the front of the store or in the produce department

*“People get into a rut with five to seven recipes. We want to give them new ideas; good P-O-P helps them see the completed meal.”*

– Jim Smits, Albertsons  
(as stated in Promo)

#### RESULTS

- ▶ During a nine-month period, Fresh Express product sales captured 50%+ volume lift over base volume<sup>1</sup>
- ▶ Other participating brand sales increased on average 40%+<sup>2</sup>

1, In-Store Marketing Institute  
2. Ibid.



## TRENDS TO WATCH (CONT'D)

### Merchandising Becomes A New Education Platform

**58% of consumers want retailers to provide store signage that clearly identifies healthier products.**

- IRI 2007 Consumer Snacking Study

Merchandising has long been used to drive awareness of products and stimulate short-term sales growth. But, as both retailers and manufacturers are recognizing, merchandising can do much more.

The purchase process across many CPG categories has evolved to require more consideration than in the past. For instance, a move to healthier eating is new terrain for many consumers, who require clear guidance regarding the nutritional content of foods and beverages, particularly when a health condition is present. Nutritional labels provide information, but reading labels on every package requires more time than most consumers have. They want retailers and manufacturers to make it easier. In fact, the IRI 2007 Consumer Snacking study found that 58% of consumers want retailers to provide store signage that clearly identifies healthier products.

Retailers are beginning to offer signage and shelf tags identifying nutritional content. Hannaford Brother's Guiding Stars system is perhaps the most sophisticated, with stars on shelf tags to indicate how healthy a product is, from one to three stars..the healthier the product, the greater number of stars. Others include Harris Teeter's shelf labels indicating, for instance, "Good Source of Vitamin A" or "0 Trans Fats."

New educational requirements are not limited to food and beverages. As outlined previously within the sustainability discussion, for instance, store signage will be required to address environmental benefits, as well as new usage requirements for products that have become more concentrated.



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## TRENDS TO WATCH

### Hi-Tech Merchandising Makes Inroads

In-store TV networks, digital signage, intelligent carts. New technologies are emerging within retail that offer promising new ways to reach consumers as traditional merchandising opportunities diminish.

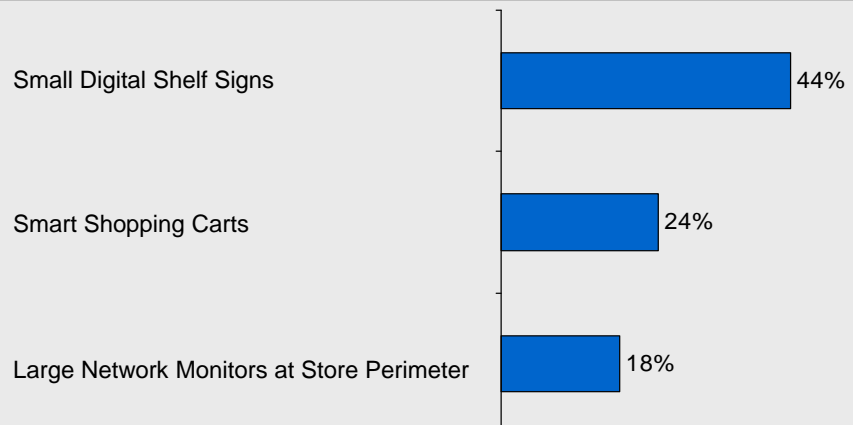
The verdict is still out on the efficacy of many of these hi-tech communication vehicles, but over the next several years, as experience and advanced technologies refine available options, winning solutions and best practices will emerge, and some of these technologies will become a merchandising mainstay.

As highlighted in the chart below, CPG marketers view digital signage as having the most potential currently. However, in-store TV networks cannot be ruled out.

Wal-Mart is investing heavily in the Wal-Mart TV Network. According to [walmartvnetwork.com](http://walmartvnetwork.com), the network, which is now available in 3,000+ stores, now allows advertisers to target ads by department, customer segment and specific display, while consumers are shopping, versus at home in front of the TV. Further, Wal-Mart is in the process of enhancing the network's value by testing screens on highly-coveted end-cap locations and at checkouts.

In-store television programming is now available across major retailers, including Albertsons, Shaws, Pathmark, Kroger and others.

**% of CPG Marketers Who Believe the Technology Has the Greatest Potential to Transform In-Store Marketing (Top 3)**



Source: In-Store Marketing Institute



## CONCLUSIONS CPG MANUFACTURERS

Manufacturers seeking to maximize merchandising opportunity within the new, emerging retail environment should consider the following action items:

- ▶ Identify new opportunities and risks
  - Assess merchandising activity and lift for your brands vs total category and competitors across key retail partners to identify gaps
  - Track changes in display and feature ad trends for your brands across key retail partners to continually assess risks
  - Identify trip-based merchandising opportunities for your categories and brands (eg. optimal promotion to suit dominant trip types, whether pantry stocking or quick trips, for instance)
  - Test new in-store marketing vehicles (eg. digital signage, in-store TV networks); explore value in shifting focus from traditional merchandising vehicles
  - Assess demand for sustainable displays and signage and potential cost savings
  - Identify opportunities to leverage merchandising to educate consumers
  
- ▶ Develop retailer-specific merchandising strategies with key accounts
  - Tie merchandising initiatives into retailer growth strategies (eg. focus on specific shopping trips, healthcare marketing, sustainability, etc)
  - Demonstrate brand value in achieving retailer objectives (eg. trip growth, basket building)
  - Build multi-category promotions that deliver solutions to consumers
  
- ▶ Closely measure and monitor merchandising executions
  - Test-market major merchandising initiatives prior to roll-out
  - Track and benchmark store-level merchandising performance and retail execution among leading retail partners
  - Monitor consumer response at multiple periods throughout the promotion so that changes can be implemented, as required



## CONCLUSIONS CPG RETAILERS

Retailers seeking to maximize merchandising opportunity within the new, emerging retail environment should consider the following action items:

- ▶ Identify new opportunities and risks
  - Continually track impact of merchandising reductions on category and store sales, share and consumer satisfaction – particularly among categories that have traditionally had high consumer response to merchandising (eg. paper towels, shelf-stable seafood)
  - Identify trip-based merchandising opportunities for your stores (eg. optimal promotions and displays to attract and grow high-value trip types)
  - Test new in-store marketing vehicles (eg. digital signage, in-store TV networks) to assess potential return relative to traditional merchandising
  - Assess potential cost savings and sources of sustainable displays and signage
  
- ▶ Partner with manufacturers in the development of merchandising strategies tailored to your stores
  - Identify opportunities to tie manufacturer merchandising initiatives into total store growth strategies
  - Develop merchandising that enhances consumers' shopping experience
    - Build multi-category promotions that deliver solutions to consumers (eg. meal solutions, spring cleaning, cough/cold)
    - Create displays that streamline shopping by making products easier to locate
    - Leverage merchandising to educate consumers (eg. store signage that identifies healthier products and their specific benefits)
  
- ▶ Closely measure and monitor merchandising executions
  - Track and benchmark store-level merchandising performance and retail execution to identify and address under-performing stores



## RESOURCES

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

IRI In-Store Solution Suite™  
(ISG)

IRI's ISG service conducts in-store audits, measuring perimeter merchandising, display, shelf, and front-end store conditions across all classes of trade; the service provides insights into shelf conditions, presence and locations of displays, etc. for own and competitive brands and categories.

IRI Shopper Insights™

IRI Shopper Insights™ solution segments and analyzes stores, shoppers, trip types, and products to uniquely define target markets; this solution integrates IRI panelist demographics with Personix™ segmentation and panelist purchase behavior.

IRI Controlled Store Testing™

IRI Controlled Store Testing™ accurately quantifies the effectiveness of an in-store marketing program and identifies opportunities to improve the program with far less cost and risk than a national rollout.



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A Snapshot of Trends Shaping the CPG Industry

## MORE INFORMATION

Please contact Sheila McCusker at [sheila.mccusker@infores.com](mailto:sheila.mccusker@infores.com) with questions or comments about this report.

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**INFORMATION RESOURCES, INC.**  
150 NORTH CLINTON STREET  
CHICAGO, IL 60661  
Telephone: (312) 726-1221