TIMES & TRENDS

A Snapshot of Trends Shaping the CPG Industry

MARKETING TO THE MULTI-TASKING CONSUMER: END-USER, SHOPPER, BUYER

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INFORMATION RESOURCES, INC.

EXECUTIVE SUMMARY

- Consumers fill three critical roles – end-user, shopper and buyer, all of which are interrelated and must be addressed in marketing and merchandising plans; while the roles are universal, behavior within them varies across global markets and categories

- Multiple end-users in a household influence purchase decisions, but the primary shopper makes the final call; as shoppers are more price-sensitive when buying for others versus themselves, optimal price, promotion and premium product opportunity will vary accordingly

- Consumers' trip missions (ie. pantry stocking, fill-in, special purpose and quick trips) heavily influence store choice; after years of broadening assortment to meet a wider range of consumer needs, most major channels have a large stake in at least three of the four, but future growth may come from specialization

- Differences in trip mission mix across countries illustrate the impact of retail industry structure on existing shopping patterns and the potential for new formats to shake things up

- A category's unique trip mix will dictate distinct product adjacency, promotion, and advertising requirements to grow category sales and attract and build target trip types

- Brand predetermination, or the extent to which brand decisions are made before shopping vs in front of the shelf, also varies widely by category and country, significantly impacting in-store promotion opportunity

INTRODUCTION

Filling the roles of end-user, shopper and buyer, consumers are the ultimate multi-taskers.

Consumers are the ultimate multi-taskers.

While marketers often view a consumer narrowly as a potential purchaser of their product or shopper of their stores, the reality is that consumers fulfill multiple roles -- end user, shopper and buyer -- all of which are interrelated.

To influence consumer behavior, marketers who focus on the total consumer will have an edge. An edge that is sorely needed in markets in which demand is not growing on its own, traditional methods of increasing demand are losing their efficacy and the competition for a piece of the pie is intensifying.

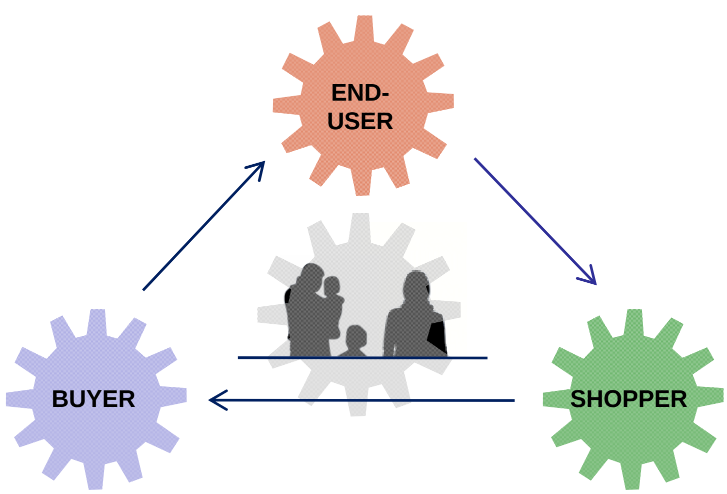
This report shares new global insights into consumer behavior across these three roles to form the foundation of marketing and merchandising strategies that drive increased store traffic, larger baskets and brand and category growth.

As highlighted throughout this report, consumer roles are universal across markets and categories, but behavior within these roles will vary depending upon market conditions (eg. retail structure and economic trends) and category dynamics (eg. brand concentration and brand-building investment).

Manufacturers and retailers who partner in uncovering and acting upon breakthrough shopper insights will reap breakthrough results.

While consumer roles are universal, there are distinct nuances in consumer behavior across markets and categories.

The Three Roles of the Consumer



CONSUMER AS END-USER
IMPACT ON PURCHASE DECISIONS

Multiple end-users in a household influence choice, but the primary shopper makes the final decision.

When an end-user of a product has a brand preference -- one that was likely cultivated through brand marketing and positive brand experiences , that preference will be a major factor in purchase decisions. Sometimes.

Whether or not the end -user is the primary shopper will have a major impact on final purchase decisions.

Advertising and marketing outside the store have critical importance in influencing end -users to request or directly purchase specific brands. However, in-store variables will play a large role in final brand selection, particularly when the primary shopper is making the purchase for someone else.

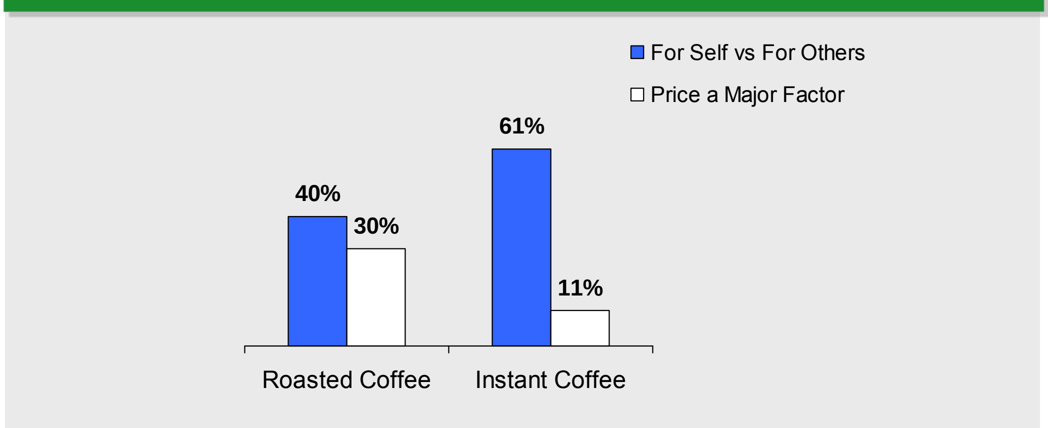
As illustrated in the chart below, shoppers tend to be more price-conscious for purchases made for others than they are for themselves, and price may override the stated preferences of others.

Retailers will benefit from an understanding of which categories have a high mix of purchases for primary shoppers themselves vs for others in the household. Categories in which consumers make a purchase just for themselves, such as shampoo for instance, will likely lend themselves more to premium products, while categories in which purchases are made for the entire family, such as a household cleaner, may not.

CPG manufacturers should explore the end-user vs purchaser dynamics for their categories and brands to identify pricing, promotion and advertising requirements and potential new premium product opportunities.

Consumers tend to be less price-sensitive if the product is for themselves vs others.

End-User vs Purchaser Example - Coffee
% of Consumers Buying for Self vs Others and Influence of Price (Italy)



Source: IRI Shopper Primary Research

CONSUMER AS SHOPPER
TRIP MISSIONS - OVERVIEW

Insights into consumer trip missions empower merchandising optimization.

With end-user preferences and purchase propensities in tow, consumers move into shopper mode. Purchase needs and time considerations will dictate the type of trip -- or trip mission -- which will heavily influence channel and store selection.

IRI analysis of over eight million shopping trips recognized 31 distinct trip types, which roll up into four primary trip missions, as summarized in the chart below.

As consumers exhibit characteristic shopping and purchase behavior within each of these trip types – including bundles of products typically purchased, quantities typically purchased, and common paths through the store -- manufacturers and retailers can leverage trip mission insights to build marketing and merchandising plans that not only drive sales growth but also enhance consumer satisfaction.

For instance, CPG manufacturers who understand the typical trip mix for their brands across major retail partners will know which promotion types (eg. single vs multiple units) are likely to be most effective to protect and grow sales within dominant trip types, which will be most effective in building under-developed trip types, and importantly, the appropriate promotional mix by retailer.

Similarly, retailers who understand the trip mission mix of their key shopper segments can leverage these insights to identify the optimal store layout, products to display and quantities to promote to maintain or reshape their trip mix.

Trip Missions Typology

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	**54%**	**21%**
Special Purpose	**2-10**	**$20-$50**	Buying for a specific event (not routine)	**17%**	**18%**
Fill In	**5-15**	**$30-$80**	Routine fill-in on heavy use categories	**16%**	**21%**
Pantry Stocking	**15+**	**$50+**	Prepare for the coming week	**14%**	**40%**

Source: IRI Shopper Insights™

*Note: The IRI Trip Typology™ is based upon an assessment of consumer purchase behavior across 8 million+ trips captured over a 52 week period; 31 distinct trip types were identified that roll up into the 4 trip mission types represented here.

CONSUMER AS SHOPPER
TRIP MISSIONS – CHANNEL/STORE SELECTION

Distinct advertising, promotion and store experiences are required to attract specific trip types.

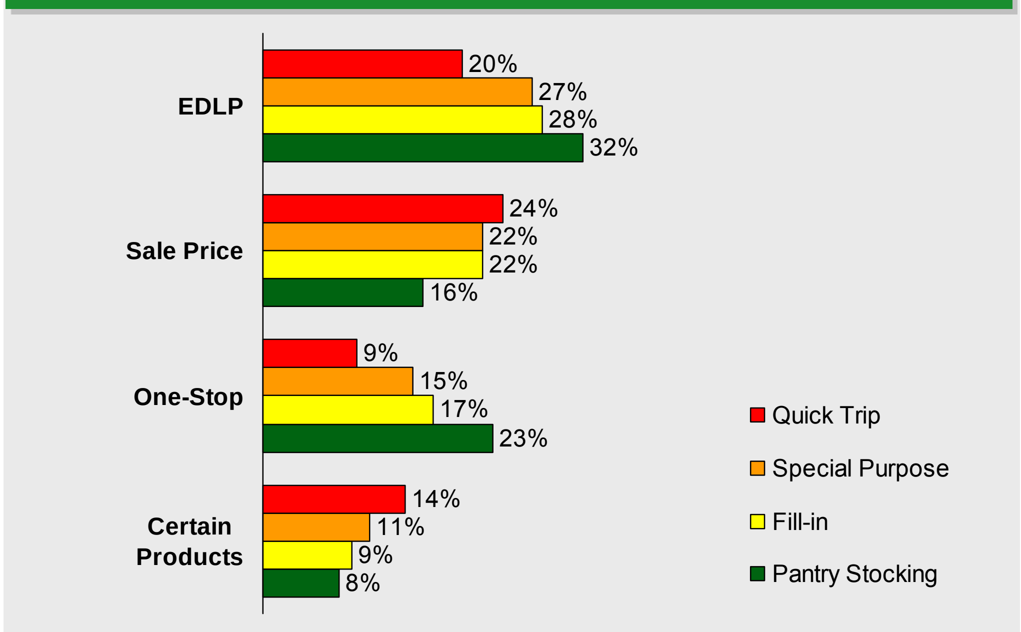
As factors driving store choice vary by trip type, so, too, will optimal advertising, promotion and store experiences.

For instance, as illustrated in the chart below, a sale price on a needed item may not sway consumers to choose one store over another for a pantry stocking trip, but it is a major consideration for quick trips. So, feature ads should contain a high mix of quick trip items on the front page, as should external store signage. By contrast, everyday low pricing is a major draw for consumers when making pantry stocking trips as they are confident that they will receive a good value on the total basket. The success of U.S. supercenters and European hard discounters in securing a sizable share of pantry stocking trips is evidence of the importance of EDLP for some consumers.

In addition, availability of a specific, harder-to-find product may prompt a store visit for a quick trip, but it will not likely wield enough power to capture a pantry stocking trip.

Retailers and manufacturers stand to reap major benefits by understanding the specific products that are most frequently purchased on various trip types and featuring these products in trip-targeted advertising and promotions.

Main Reason for Store Selection by Trip Mission – U.S.
% of Consumers (Select Responses)



Source: IRI Shopper Insights™ Consumer Survey

CONSUMER AS SHOPPER
TRIP MISSIONS – CHANNEL

After a decade of channel blurring, each major CPG channel has a strong position in at least three of the four trip missions.

As consumer store selection criteria vary by trip type, it is not surprising that we see differences in trip mission mix by channel. As reflected in the chart below, for instance, just over half of grocery revenue is derived from pantry stocking trips, while smaller-format drug stores' dollars are heavily concentrated in quick trips. At the retailer and even store level, there is further differentiation.

After years of assortment expansion strategies that led to channel blurring, each of the major channels now has a sizable position in at least three of the four trip missions. While there may be further growth available through this approach for some retailers, the bigger opportunity now may be specializing in one or two trip types through formats, layouts and assortments that are tailored to deliver a targeted, simplified, satisfying shopping experience.

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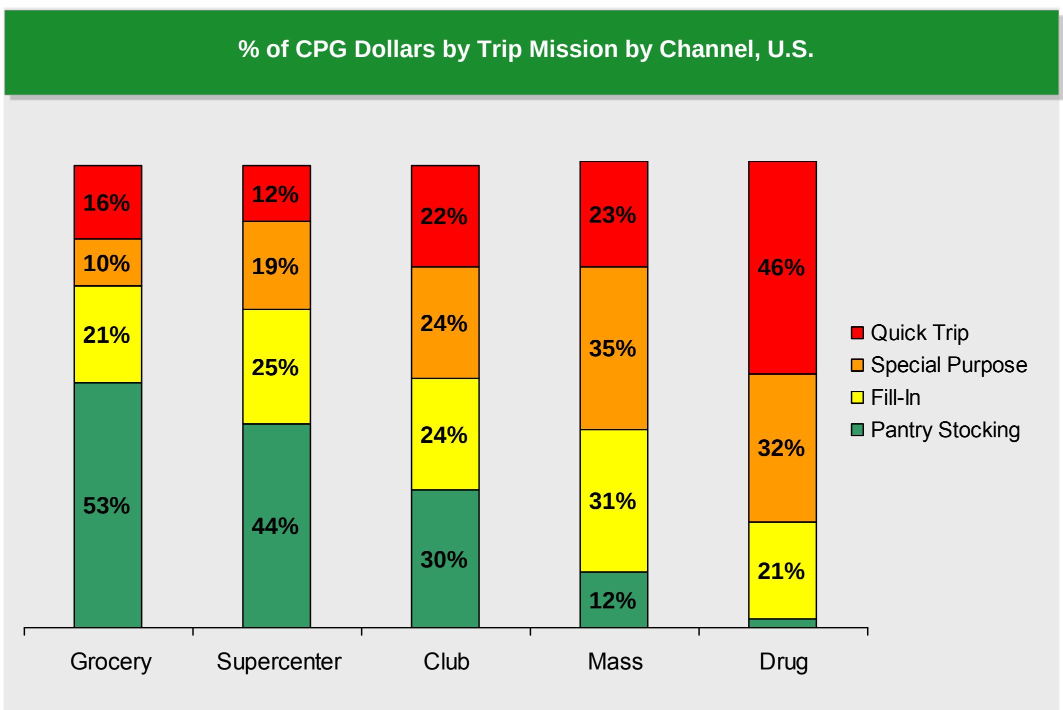


Source: IRI Shopper Insights™

CONSUMER AS SHOPPER
TRIP MISSIONS – RETAIL STRUCTURE

As evidenced by differences in trip mission mix by country, retail industry structure significantly impacts shopping patterns.

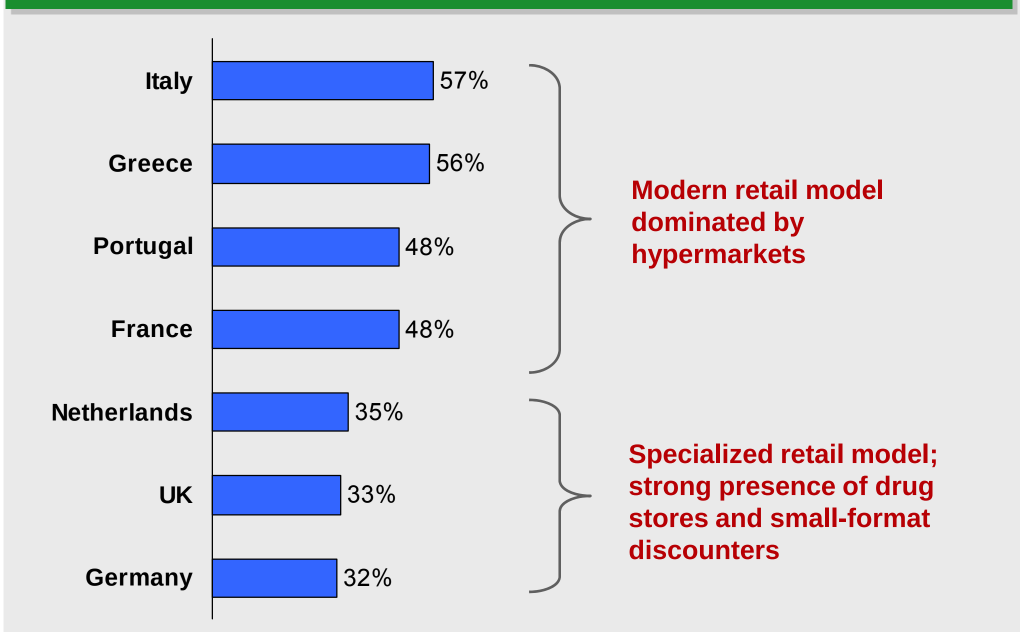
Available retail options in a market will also have a major influence on consumer shopping patterns. The chart below highlights significant differences in pantry stocking behavior across countries depending upon their retail structure.

Where hypermarkets have become a major presence, as in Italy and Greece, for instance, large routine pantry stocking trips are common. By contrast, in markets such as Germany, smaller stores and smaller trips prevail.

It is important to note, however, that no format or channel has the undisputed corner on a particular trip type. Across European countries, for instance, despite a limited assortment, hard discounters have secured a sizable share of pantry stocking visits. (See next page for additional detail.)

Nothing is set in stone. The emergence of a new format has the potential to shake up consumer shopping patterns. As express stores (roughly 15,000 square feet with a focus on prepared foods, produce and other quick trip items) expand across the U.S., for instance, quick trips could grow to a higher proportion of dollars spent. Further, existing channels have the potential to capture a greater share of non-traditional trips through targeted marketing, merchandising and store layouts.

Pantry Stocking as % of Total Trips by Country



Source: IRI Shopper Primary Research

CONSUMER AS SHOPPER
TRIP MISSIONS – CHANNEL

Hard discounters' ability to capture a sizable share of pantry stocking trips demonstrates the dynamic nature of consumer shopping patterns.

While consumers may seek one-stop-shopping for pantry stocking trips, value also clearly comes into play, and for many consumers becomes the overriding channel and store selection criterion.

Across several European countries, including Germany and Greece, hard discounters, who offer everyday low pricing on a very limited assortment of products, are winning pantry stocking trips.

Hard discounters Aldi and Lidl, for instance, typically limit their permanent product range to only 1,200 SKUs – compared to a traditional grocery store SKU count of 20,000 – 30,000, these retailers offer an extremely narrow selection.[1] Further, these retailers have a limited presence of national brands, as they place a heavy focus on private label. Yet, this format has gained traction among consumers' large stock-up trips, in large part by delivering quality in addition to price.

Can hard discounters' success in gaining high-ticket pantry stocking trips extend globally?

Individual market conditions and available retail options will clearly shape hard discounter opportunity by country and market, but the potential for hard discounter gains is very real. In the U.S., for instance, Aldi now has over 800 stores located in 27 states, offering the hard discounter shopping experience to an increasing base of consumers. [2]

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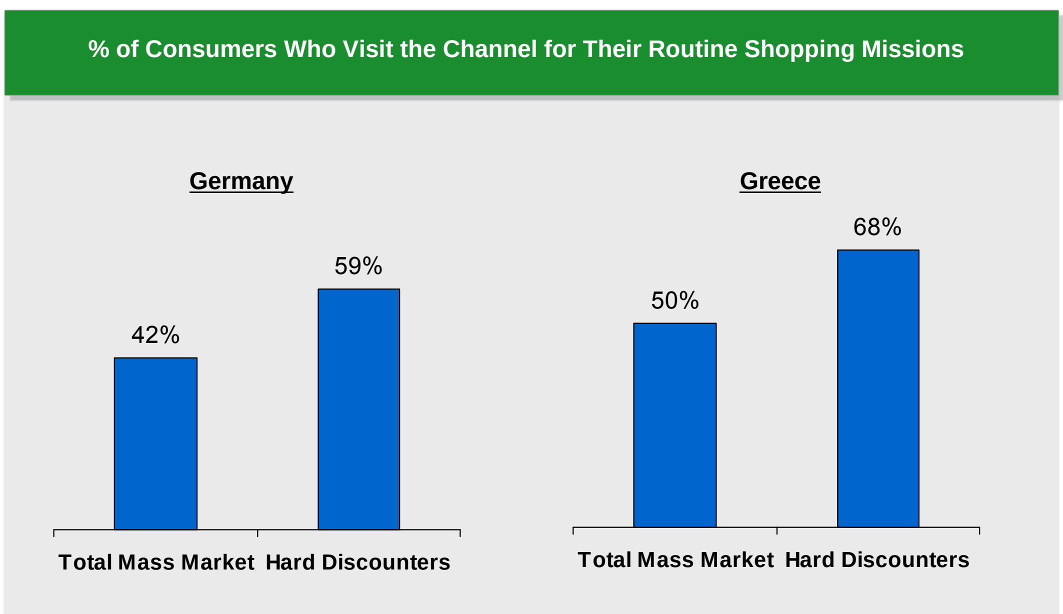


Source: IRI Shopper Primary Research

1. IGD Research
2. Company Website

CONSUMER AS SHOPPER
TRIP MISSIONS – CATEGORY: CONVENIENT MEAL SOLUTIONS

There are unique trip-based marketing and merchandising opportunities across categories.

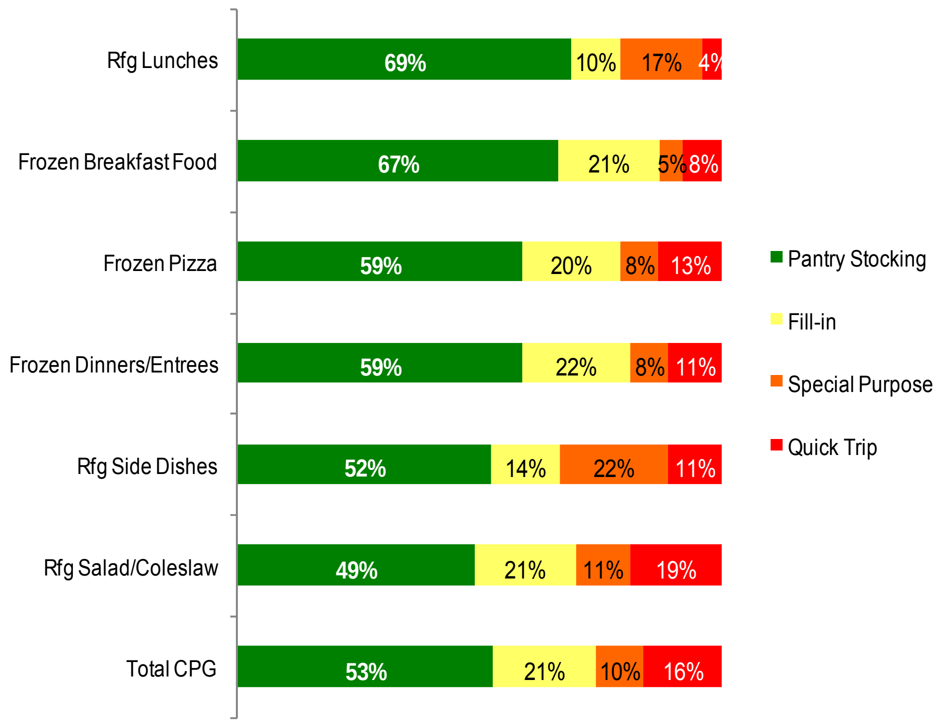
As consumer usage patterns differ across categories, shopping patterns, as reflected in trip mission mix, differ also – with major implications for CPG marketers.

Consumers allocate a majority of their spending for packaged convenient meal solutions to pantry stocking trips, with some products, such as refrigerated lunches and frozen breakfast foods showing a strong skew, relative to total grocery spending.

As highlighted in the frozen dinner case study on the next page, shopping patterns across these categories require distinct promotional considerations.

There are unique trip-based opportunities within each category. Refrigerated side dishes, for example, have a low proportion of quick trips relative to refrigerated salads. Similarities between these categories – fresh, easy meal complements – suggest an opportunity to bolster refrigerated side dish quick trip sales through adjacencies with other quick trip items and "dinner tonight" promotions, for instance.

% Category Dollar Sales by Trip Mission – Grocery Channel
Select Convenient Meal Solutions



Source: IRI Shopper Insights™

CONSUMER AS SHOPPER
TRIP MISSIONS – CATEGORY: CONVENIENT MEAL SOLUTIONS

Multi-unit, multi-variety promotions of single-serve frozen dinners will deliver larger baskets and increased brand sales.

Case Study: Single-Serve Frozen Dinners

BACKGROUND

- Frozen dinners are a critical grocery category – present in 11% of all baskets and 30% of pantry stocking trips
- As purchase patterns differ by trip type, trip-specific promotions are required to maximize lift

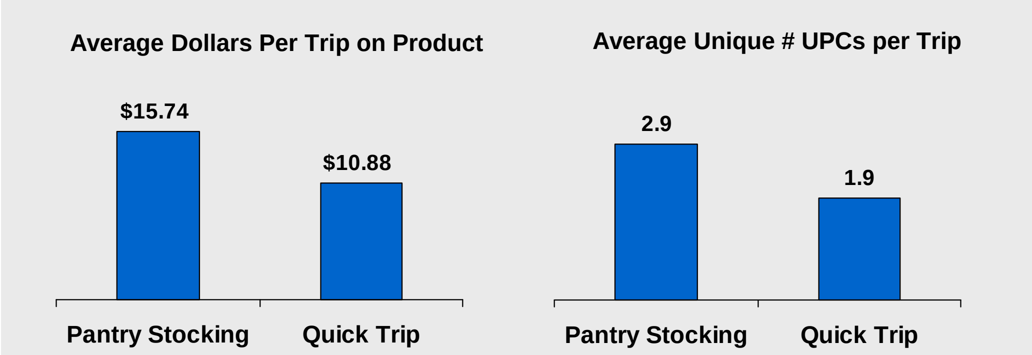
INSIGHT

- Consumers spend 45% more on single-serve frozen dinners when on pantry stocking vs quick trips and purchase one additional item on average (see chart below)
- Consumers spend $1.00 more per pantry stocking trip on single vs multi-serve dinners

OPPORTUNITY

- Leverage multi-unit promotions of single-serve frozen dinners to grow total pantry stocking baskets and brand sales
- Carry a broad assortment of single-serve frozen dinners
- Offer at least six varieties during a promotion (two times the average number purchased)

Single-Serve Frozen Dinners
Purchase Dynamics: Pantry Stocking vs Quick Trips



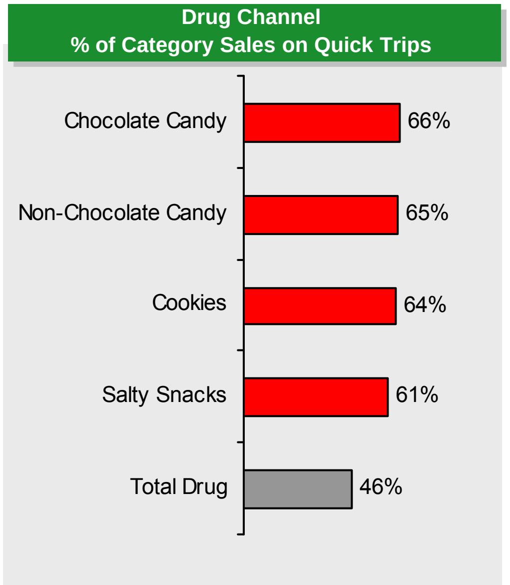
Source: IRI Shopper Insights™

CONSUMER AS SHOPPER
TRIP MISSIONS – CATEGORY: SNACKS

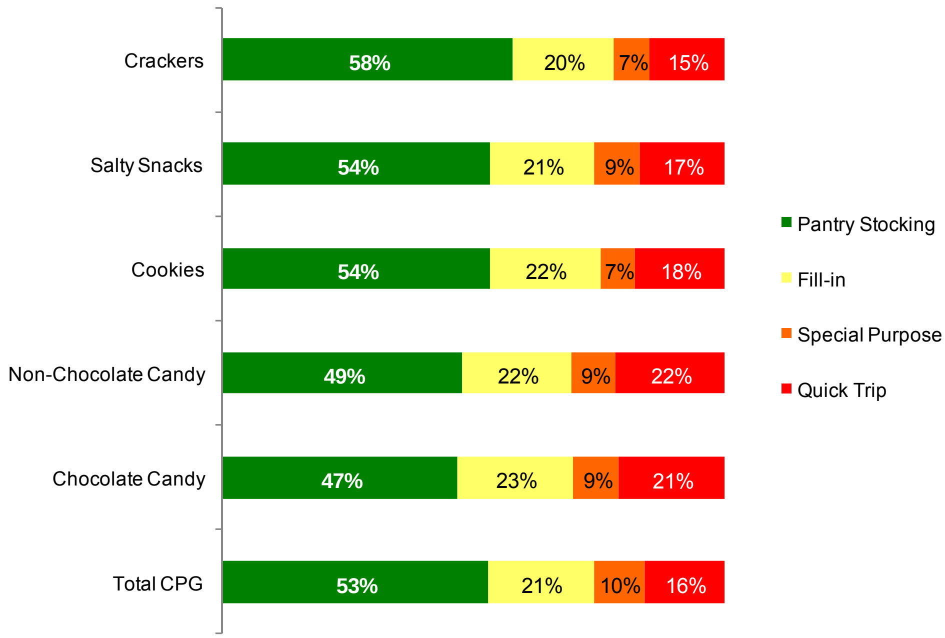
Within the drug channel, snack categories can be leveraged to drive quick trip frequency and basket size.

Grocery channel trip mission mix across major snack categories closely follows total grocery spending patterns. As candy categories have an above-average mix of quick trips, these products should be considered as feature items in grocers' efforts to increase quick trip sales.

Within the drug channel, snacks can play a major role in driving quick trip frequency and basket size, as nearly two-thirds of consumer spending across several major snack categories occurs on quick trips. Shelf placement, package size, types of promotions and pricing should reflect quick trip shopping preferences.



% Category Dollar Sales by Trip Mission – Grocery Channel
Select Snack Categories



Source: IRI Shopper Insights™

CONSUMER AS SHOPPER
TRIP MISSIONS – CATEGORY: BEVERAGES

Beer, wine, spirits categories are powerful drivers of quick trips and special purpose trips.

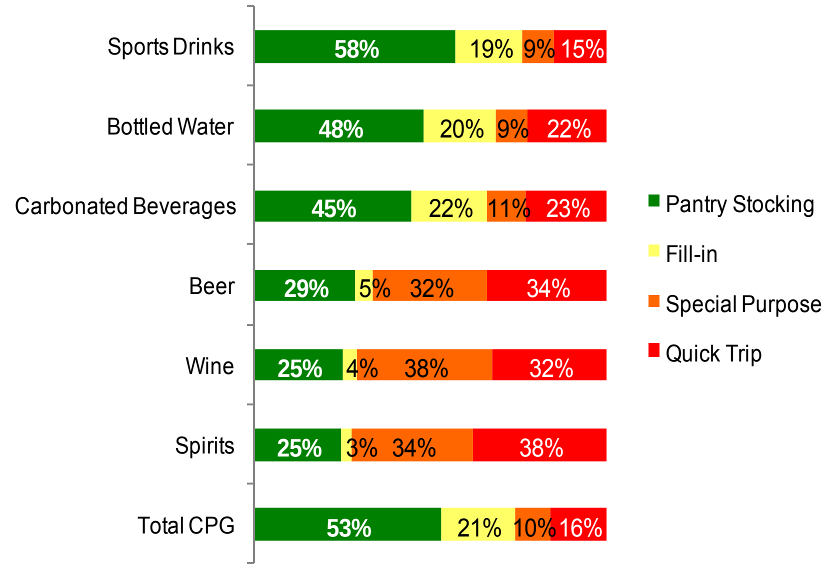
Across beverages, consumer shopping patterns differ dramatically for beer, wine, spirits products versus beverages without alcohol. As a result, the role that these product segments play in retailers' growth strategies and the optimal shelf placement and promotional strategies will differ, as well.

Major non-alcoholic beverages remain a cornerstone of pantry-stocking trips. These products can be effectively cross-merchandised with other staples to streamline shopping for consumers but can also be a strong basket-builder when paired with less-frequently purchased complementary products, such as select snacks.

Beer, wine, spirits products follow an atypical shopping pattern for grocery stores. These categories provide unique opportunities to capture a greater share of spending across less-developed trip types, including traffic-building special purpose and quick trips.

As highlighted in the wine case study on the following page, retailers can reap huge rewards by identifying the category trip mix for their stores –down to the trip type level (ie. the 31 trip types) and explicitly targeting high-value trip types via store layout, assortment and promotions.

% Category Dollar Sales by Trip Mission – Grocery Channel
Select Beverage Categories



Source: IRI Shopper Insights™

CONSUMER AS SHOPPER
TRIP MISSIONS – CATEGORY: BEVERAGES

Retailers can attract high-value wine shopping trips through multi-category party planning displays, store sections and promotions.

Case Study: Wine - Attracting Special Purpose Party Prep Trips

BACKGROUND

- Wine spending within the grocery channel is heavily concentrated in special purpose and quick trips (70% combined) and contributes to higher total basket size due to high average ticket
- Retailers and manufacturers have a solid opportunity to collaborate in leveraging wine as a basket builder and store traffic generator while growing wine and complementary category and brand sales

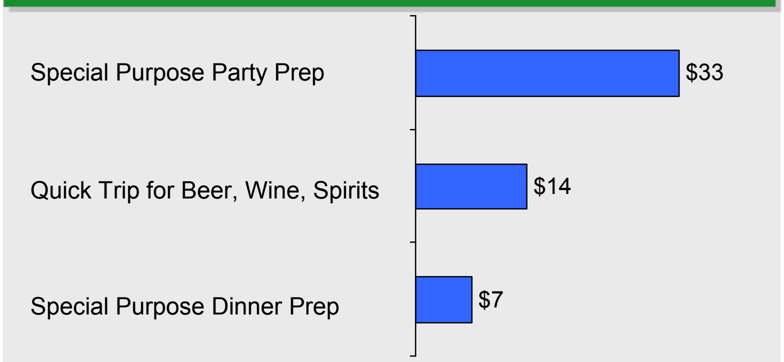
INSIGHT

- Spending on wine varies substantially by specific trip type
  - "Special Purpose Party Prep" trips deliver 2-3x the wine sales of other trip types with an average $33 wine spend per trip
  - Quick trips deliver the second largest wine expenditure ($14)

OPPORTUNITY

- Cater to party prep trip types through dedicated store sections featuring common party purchases (identified via product affinity analysis), multi-category displays and promotions, and targeted feature ads
- Capture a greater share of quick trips and grow quick trip baskets through store layouts enabling easy in-and-out for wine purchases, information kiosks assisting with quick selection of the right wines, and displays featuring most popular wines

Grocery Channel: Average Wine Expenditure by Trip Type (Select Trip Types)



Source: IRI Shopper Insights™

CONSUMER AS SHOPPER
TRIP MISSIONS – CATEGORY: HEALTHCARE

Grocers looking for a bigger stake within healthcare categories should cater to quick trips.

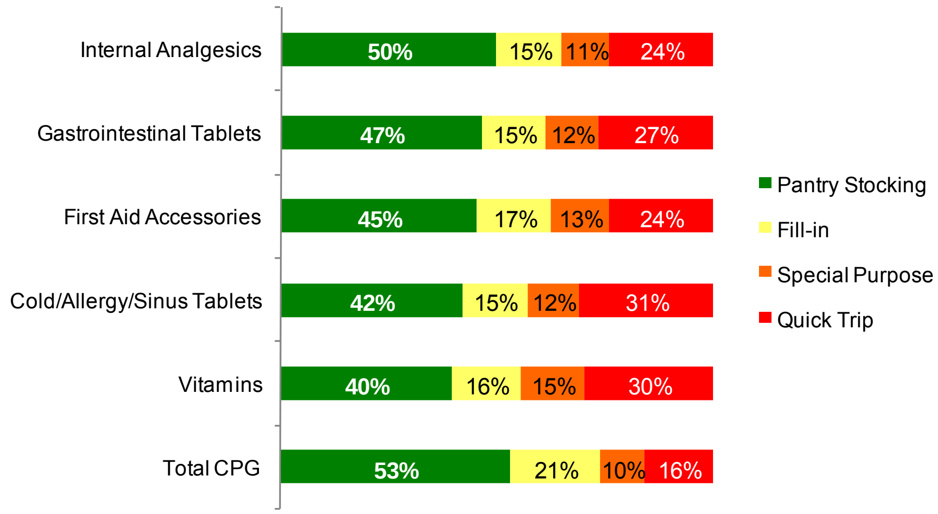
Consumer healthcare spending within the grocery channel differs from their spending patterns for other grocery products in that there is a much greater allocation of spending to quick trips.

These categories have the power to bring consumers into the store.

Grocers looking to increase share within these categories should ensure that store layout enables easy in-and-out for purchases of these categories, products are featured on the front page of ads and in external store signage, and other quick trip items and complementary products (such as facial tissues, cough drops, etc) are adjacent to these categories to grow basket size.

Within the drug channel, trip mission mix across the categories listed below follows drug store total CPG spending closely, with 40% or greater of dollars spent allocated to quick trips. However, as illustrated in the internal analgesic case study on the following page, some of the greatest growth opportunities occur in less-developed, high-ticket trips.

% Category Dollar Sales by Trip Mission – Grocery Channel
Select Healthcare Categories



Source: IRI Shopper Insights™

CONSUMER AS SHOPPER
TRIP MISSIONS – CATEGORY: HEALTHCARE

Drug stores can attract high-ticket internal analgesic fill-in trips through multi-brand promotions.

Case Study: Internal Analgesics – Attracting High-Ticket Fill-in Trips

BACKGROUND

- Internal analgesics are purchased in 5% of drug store trips and are a top ten item in drug store baskets
- Drug retailers and internal analgesic manufacturers have a major opportunity to collaborate in building marketing and merchandising plans that attract high-value trips, grow baskets and increase brand and category sales

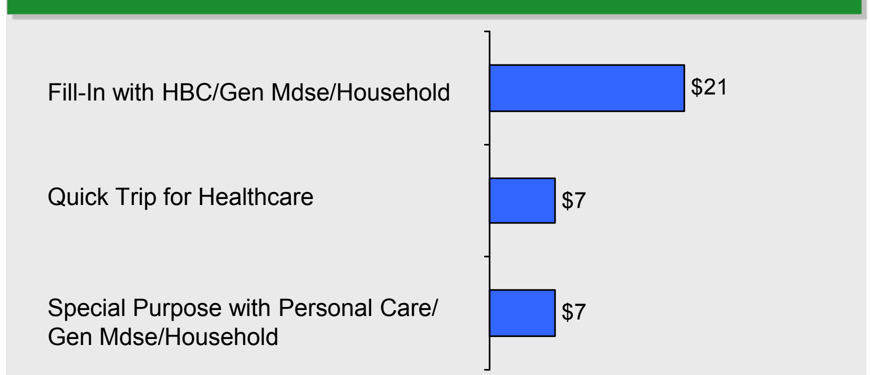
INSIGHT

- One particular trip type in drug stores – "Fill-in with HBC/General Merchandise and Household Products" delivers internal analgesic dollars per trip 3x that of other trip types
- Over two-thirds of this trip type include multiple brands, and one-third had multiple forms (eg. nighttime vs daytime relief)

OPPORTUNITY

- Attract this high-ticket trip type, grow category sales and build loyalty among heavy pain relief spenders with internal analgesic promotions featuring multiple brands and/or multiple forms

Drug Channel: Average Internal Analgesic Dollars per Trip by Trip Type (top 3)



Source: IRI Shopper Insights™

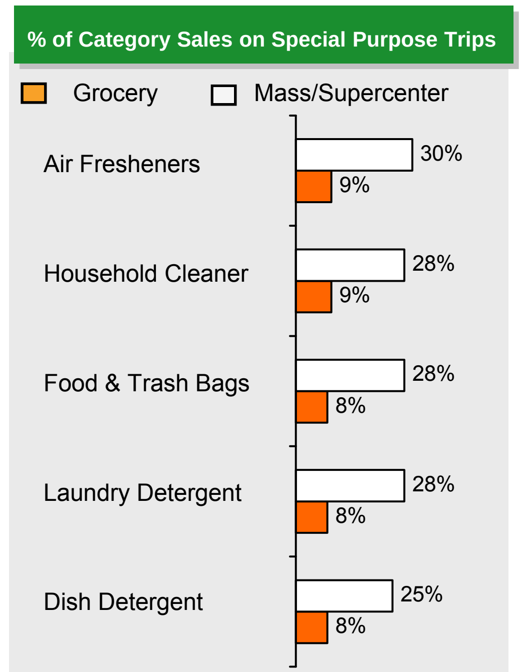
CONSUMER AS SHOPPER
TRIP MISSIONS – CATEGORY: HOME CARE

Home care is a destination department within mass/supercenters but not yet within grocery stores.

Within the grocery channel, home care categories are not typically destination categories. The majority of home care product spending within grocery stores occurs on pantry stocking trips.

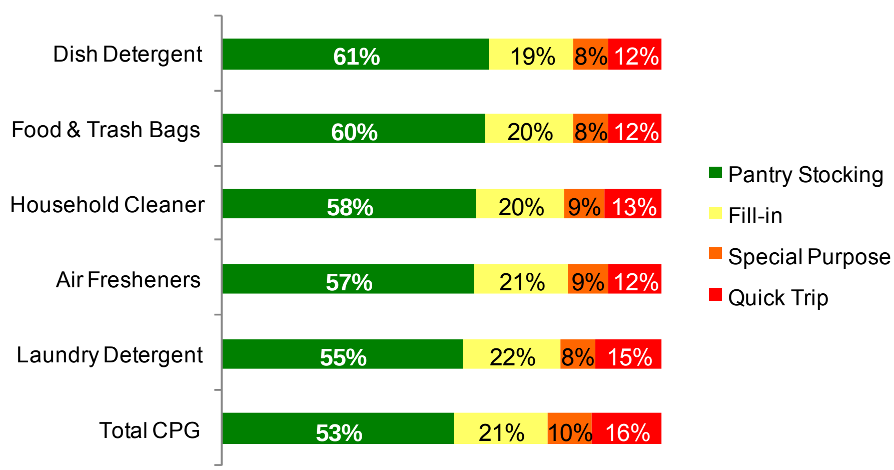
However, home care shopping patterns within the mass/supercenter channels demonstrate the ability of these categories to draw consumers into the store. As illustrated in the top chart, special purpose trips comprise a large proportion of category spending within supercenter/mass. Capturing a greater piece of this these trips will mean more store traffic and greater category sales for grocers.

In addition to targeted promotions across home care categories, grocers should consider building home care "solution centers" within the store, where all products are available in one place -- sending a message to consumers that the store is a go-to place for home care.



Source: IRI Shopper Insights™

% Category Dollar Sales by Trip Mission – Grocery Channel
Select Home Care Categories



Source: IRI Shopper Insights™

CONSUMER AS BUYER
BRAND PREDETERMINATON - CATEGORY

The ability to influence purchase decisions in-store is impacted by the level of brand predetermination within the category.

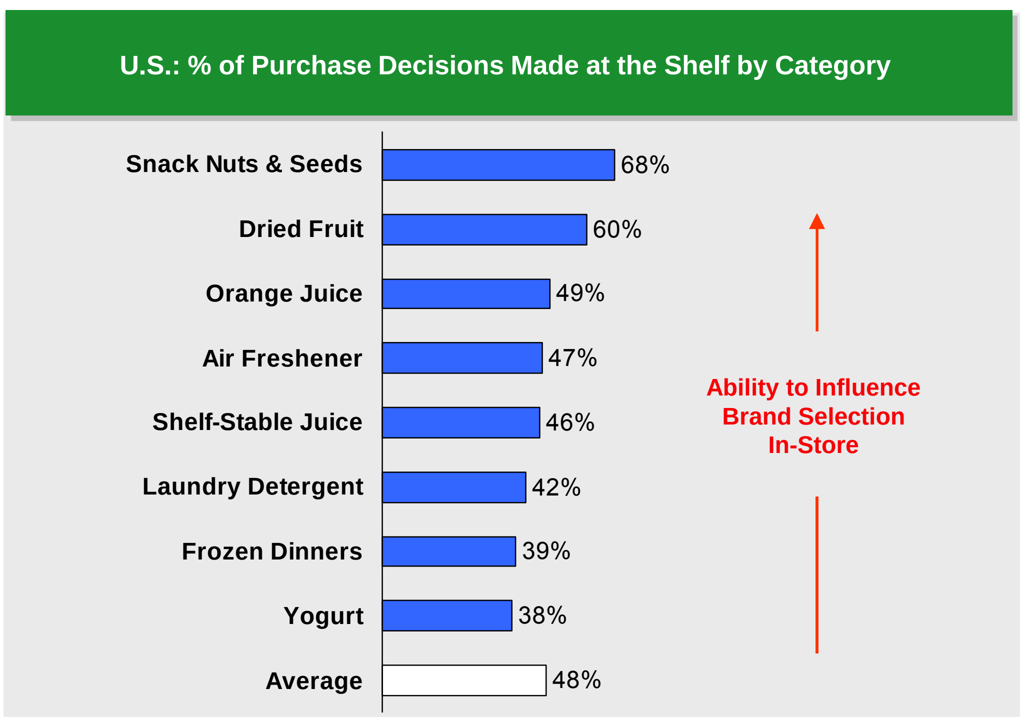
After consumers have made their store selection based upon their trip mission needs, they move into their buyer role. In-store marketing now heavily comes into play.

As highlighted in the case studies introduced within the prior section, a category's trip mission mix will influence optimal promotions, pricing and assortments to capture a greater share of specific trips and grow category and brand sales.

However, additional category dynamics, such as category concentration and brand building investment, will also influence in-store marketing opportunity, as these factors will impact the level of brand predetermination – the proportion of brand decisions made before a consumer even enters the store vs decisions made at the shelf.

As highlighted in the chart below, brand predetermination varies widely across categories.

Within dried fruit and snack nuts, for instance, as a majority of brand decisions are made at the shelf, effective in-store brand marketing is imperative; by contrast, the relatively low percentage of yogurt brand decisions made in-store creates fewer opportunities to impact brand choice at the shelf.



Source: IRI Shopper Primary Research

CONSUMER AS BUYER
BRAND PREDETERMINATON - COUNTRY

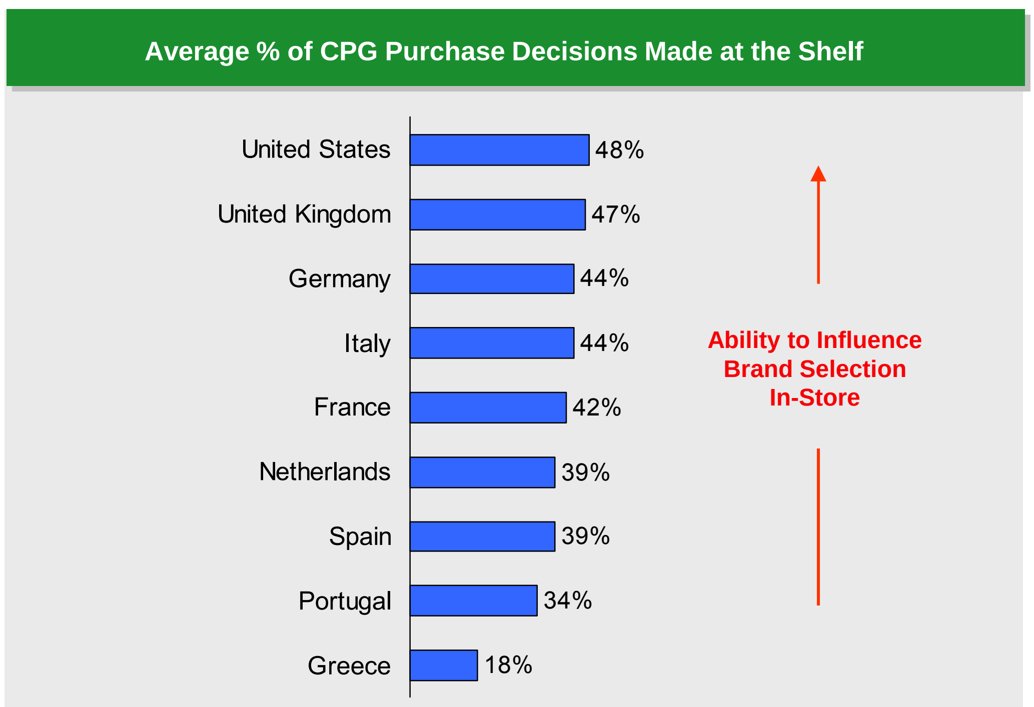
In-store marketing potential to drive brand choice varies dramatically by country.

As stated in the introduction to this report, while consumer roles as end-user, shopper and buyer are universal, market differences will alter consumer behavior within each role, which will necessitate unique market-specific strategies.

This phenomenon is clearly evident in the average level of brand determination by country, as demonstrated in the chart below.

As a result, in-store marketing opportunity and strategies will be dramatically different in Greece, for instance, where the vast majority of brand decisions are made before a store visit versus the U.S, and the U.K., where nearly half of brand decisions are made at the shelf.

For multinational brands and retailers, understanding this dynamic is an absolute imperative to determine optimal marketing and merchandising mix as well as focus of in-store promotions (ie to drive brand selection vs increasing purchase size when brands are already determined.)



Source: IRI Shopper Primary Research

CONCLUSIONS
CPG MANUFACTURERS

Manufacturers seeking to capture incremental growth through strategies based on shopper insights should consider the following action items:

- Identify new growth opportunities through shopper insight analysis
  - Assess end-user vs purchaser dynamics for your categories and brands and resulting pricing, promotion and premium product implications
  - Understand the trip mix for your categories and brands and alignment with key retailer partner trip strategies; analyze across international markets as differences are likely
  - Identify the level of brand predetermination for your categories and brands and resulting in-store marketing implications

- Build collaborative marketing and merchandising plans with key retail partners
  - Pricing strategies should take into account the extent to which purchases are made by end-users vs for others, which impacts price sensitivity
  - Products with a high purchase incidence on targeted trip types or that are complementary to these products should be placed together on shelves and bundled in promotions and displays to drive traffic and basket size
  - Assortment should reflect dominant purchase patterns (eg. broad assortment for categories with multi-unit purchases on pantry stocking trips)
  - Location within the store should reflect dominant trip types, as well as targeted trip types, where relevant (eg. front-of-store displays for quick trip items)
  - In-store marketing plans should be built around the level of brand predetermination (eg. focus on increasing purchase quantity where predetermination is high vs influencing brand choice where it is low)

- Measure and monitor plan success
  - Track share across stores implementing initiatives above vs those without
  - Monitor brand contribution in retailer partner's achievement of plan goals, including trip mix and basket growth, as well as category and brand share

CONCLUSIONS
CPG RETAILERS

Retailers seeking to capture incremental growth through strategies based on shopper insights should consider the following action items:

- Identify new growth opportunities through shopper insight analysis
  - Work with leading manufacturers to assess end-user vs purchaser dynamics for top categories and brands and resulting pricing, promotion and premium product implications
  - Identify the current and desired trip mix for your stores, leveraging industry benchmarks to assess opportunity; explore the potential of specializing in specific trip types
  - Work with leading manufacturers to determine trip mix for top categories and brands and alignment with your trip strategies
  - Identify the level of brand predetermination across leading categories and brands and resulting in-store marketing implications

- Build collaborative marketing and merchandising plans with key manufacturers
  - Develop a comprehensive strategy to attract and build both dominant and high-potential trip types; critical considerations include:
    - <u>Format:</u> appropriate size and experience to address target trip needs
    - <u>Layout:</u> Facilitate common paths through the store
    - <u>Product Adjacencies</u>: Place products with high trip purchase incidence and complimentary products adjacent to one another
    - <u>Assortment:</u> Reflect typical purchase patterns in assortment decisions (eg. Broad assortment for multi-unit pantry stocking)
    - <u>Promotion</u>: Bundle high-index products and complimentary products in joint promotions and advertising
    - <u>Pricing</u>: Take pricing preferences by trip type into account (ie. sale items vs EDLP)
  - Category pricing strategies should reflect the extent to which purchases are made by end-users vs for others, which impacts price sensitivity
  - In-store marketing plans should be built around the level of brand predetermination

- Measure and monitor plan success
  - Establish key performance metrics based on shopper insights, including total trip mix, trip mix across key categories and consumer segments and basket size in aggregate and across trip types

RESOURCES

To identify shopper insight-based growth opportunities for a specific brand, category or retailer, contact your IRI client service representative or the product managers listed below to learn more about the following IRI services:

IRI Trip Typology™ Reports

- The standard report package includes the following:
  - Distribution of trips by the four trip missions
  - Distribution of trips by the 31 trip types
  - Product affinity reports showing the percent of baskets containing the "target product" that also contained each of over 250 other product categories
- Reports can be run on any combination of products, geographies (regions, outlets or specific retailers) and time periods
- IRI Trip Typology™ reports can be used to
  - Refine consumer, customer and channel strategies
  - Develop differentiated merchandising strategies for different types of retailers and categories based on their trip mix
  - Support tactical merchandising recommendations
- **For more information, contact IRI Trip Typology™ product manager Valerie Walker at (312) 474-8945 or valerie.walker@infores.com.**

IRI Shopper Primary Research

- Syndicated cross-category studies by country providing shopper insights based upon in-store observation and interviews
- Custom primary research studies addressing a wide range of issues, including shopping behavior analysis, testing of merchandising solutions, store image perception, etc.
- **For more information, contact Louis-Michel Barbotin (France) at +33 1 30 06 22 23 or louis-michel.barbotin@infores.com**

MORE INFORMATION

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

ABOUT IRI

IRI is the world's leading provider of consumer, shopper, and retail market intelligence and insights supporting 95 percent of the FORTUNE Global 500 consumer packaged goods (CPG), retail and healthcare companies. Only IRI offers the unique combination of integrated market information, automated and predictive analytics, innovative enabling technologies, and domain expertise. With IRI, leading retailers and manufacturers are able to quickly discover breakthrough insights driving smarter decisions and actions across the enterprise for breakthrough results. Companies around the world depend on IRI for improved productivity, stronger brands, and dramatic revenue growth. For more information, visit http://www.infores.com.

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