

A collage of various barcode labels and numbers, including '11205', '3 109', 'GMR3C', '070', '8 654 3_109', '54 3', '9', '3180065 71135', '678900', '109', '711135', '388070', '9 788070', '00376211205', '2345 678900', '9 8 654 3_109', and 'GMF', scattered across the top and bottom of the page.

SHOPPER MARKETING

PROFITING FROM THE PLACE
WHERE **SUPPLIERS,**
BRAND MANUFACTURERS,
AND **RETAILERS** **CONNECT**

DANIEL J. **FLINT** | CHRIS **HOYT**
NANCY **SWIFT**

Shopper Marketing

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Shopper Marketing

**Profiting from the Place Where Suppliers, Brand
Manufacturers, and Retailers Connect**

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This book is dedicated to all the shopper marketing professionals working diligently for long hours to improve the shopping experience and to all the scholars passionate about research that can assist the shopper marketing discipline.

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Foreword

Few can lay claim to being both pioneers *and* futurists, but Chris Hoyt, Dan Flint, and Nancy Swift are exactly that when it comes to the exciting—and still emerging—discipline of shopper marketing. Together, they have defined shopper marketing’s purpose and elucidated its full potential over the past 20 years or more.

Yes, it’s been at least that long. While many trace the birth of shopper marketing to the moment at which Coca-Cola or perhaps Procter & Gamble embraced it about a decade ago, its roots actually run deeper than that. In fact, I can remember talking about placing the shopper at the center of marketing with Chris and Nancy as early as 1987. We just didn’t know what to call it yet!

While the idea of putting shoppers first may sound obvious now, it wasn’t always so. For years, even decades, retailers and manufacturers focused mostly on each other without much real concern for the shopper or the shopping experience. Marketing brands at retail, such as it was, was more about striking a deal between business adversaries than thinking about what shoppers might actually want or need at the store.

That changed rapidly with the advent of the Internet and the power it invested in the shopper. It accelerated further with the recognition that the retail store was not merely a channel for the distribution of products, but a highly experiential medium for marketing in its own right. It arrived with the epiphany that if accountability in marketing were the goal, then it made sense to invest marketing dollars where the cash register rang.

Shortly after I launched *The Hub Magazine* in 2004, Chris and Nancy fielded the first of a series of research studies to bring greater definition to what was then becoming known as shopper marketing. The goal was to identify its tenets and codify “best practices.” The idea was to set some standards and try to help move the industry forward.

This seminal research became the foundation of an annual industry survey, *The Hub Top 20*, in which agencies and brands (both manufacturer and retailer) evaluate each other’s progress against a specific set of criteria. Now in its eighth year, and with the support of Dan Flint’s Shopper Marketing Forum at the University of Tennessee, *The Hub Top 20* serves as an ongoing reminder of both the promise and the complexities of achieving excellence in shopper marketing.

That search for excellence begins with this book. Chris, Dan, and Nancy have set forth, with great clarity and in fine detail, exactly what it takes to do shopper marketing—and do it right. *Shopper Marketing* is indispensable to novice and experienced shopper marketers alike. Read it, study it, and read it again. Refer back to it.

Share it, discuss it, and keep it by your side. Apply it with the same verve with which it was written. It is both a handbook for today's shopper marketer and a guidebook to the future of shopper marketing.

Tim Manners

Founder

The Hub Magazine

February 23, 2014

Acknowledgments

Shopper marketing is a discipline that has been “built” rather than “born.” We wish to offer special thanks to those “builders”—some known throughout the industry for their pioneering efforts in making shopper marketing a mainstream strategy for all product marketers, regardless of size or nature of business; others perhaps less known but who nonetheless contribute to the body of knowledge through their questioning, creativity, and passion.

From the manufacturing side, thanks to A. G. Lafley, Dina Howell, and Brett Stover who brought industrywide visibility to shopper marketing and laid much of the strategic underpinnings while at P&G. Thanks to Lisa Klauser and Mike Twitty for generously sharing with the industry their research in understanding the shopper while at Unilever. A personal as well as industry thank you to Mike McMahon, Jesse Spungin, and Tammy Brumfield for demonstrating in ConAgra how the integration of shopper marketing into the organization could drive sales and ROI. Thanks also to Rick Abens, now leading Foresight ROI, and Cannon Koos, who developed shopper marketing metrics there. Thanks to Jeff Swearingen and Stephen Springfield, who championed shopper marketing at Frito-Lay, as did John Compton and Michelle Adams at PepsiCo and Mark Scott at Kimberly-Clark. Thanks to Jeff King and Bill Lardie of Anderson Merchandisers, Tim Purcell of Pilot Flying J, and Ray Kielarowski of Bush Brothers for their generous support.

Special thanks to the agencies that have taken the shopper marketing concept and, with both insight and creativity, spun it into programs that meet the needs of shoppers, retailers, and brands. Our appreciation to Ken Barnett, Paul Gustafson, Jim Holbrook, Beth Ann Kaminkow, Terry Mangano, Andy Murray, Sharon Napier, Joe Robinson, Michele Roney, Karen Sauder, Cecy Shveid, and Al Wittemen. So many of the real drivers of shopper marketing come from the agency side, and we thank them all.

Thanks to the shopper marketing evangelists—those people who saw the inherent value of shopper marketing, many very early on—and told the world about it. For adding to the knowledge base of shopper marketing we specifically want to thank Mike Bach and Bryan Gildenberg for their work at MVI/Kantar Retail, Bill Bishop of Willard Bishop Consulting, Matt Egol of Booz & Company, and John Karolefski and Linda Winick of CPG Matters. We also thank the authors Paco Underhill, Herb Sorensen, Michael Anthony, Toby Desforges, Markus Ståhlberg, and Ville Maila. A very special thanks to Tim Manners, publisher of *The Hub Magazine*, for all his efforts in advancing shopper

marketing. From providing the platform for countless research surveys, to establishing the standards with *The Hub Top 20*, to interviewing and showcasing industry leaders, Tim is an indefatigable champion of shopper marketing and a great friend to all of us.

Finally, we thank Tiffany Jenkins, Chip Hoyt, and Lynn, Ryan, and Spencer Flint for being the best of sounding boards—both honest and insightful—as we worked through the challenges. Your support is invaluable.

About the Authors

Dan Flint, PhD, is the Regal Entertainment Group Professor of Business and Director/Founder of the Shopper Marketing Forum in The Department of Marketing and Supply Chain Management, The University of Tennessee, Knoxville. He is a graduate from the US Naval Academy, has a sales engineering background, and a PhD in marketing and logistics from the University of Tennessee. He has worked with many firms in the consumer goods, aerospace, industrial, and third-party logistics industries on branding, shopper marketing, marketing strategy, account management, and innovation. He works internationally often and remains active in both marketing and supply chain management associations. His research focuses on helping businesses develop a proactive customer orientation; understand what customers, consumers, and shoppers value; improve their marketing strategies; and develop more productive business-to-business connections. Dan has published in top-tier journals such as the *Journal of Marketing*, *Journal of Consumer Research*, *Journal of the Academy of Marketing Science*, *Journal of Business Logistics*, and the *International Journal of Physical Distribution and Logistics Management*. Dan currently is focused on shopper marketing, spending a great deal of time with leading CPG, agency, broker, and retailing firms.

Founder of Hoyt & Company and a CPG marketing and sales consultant for more than 35 years, **Chris Hoyt** has developed an industrywide reputation for his real-world, fact-filled, challenging, and entertaining point of view. Because Chris actually “walked the walk” in senior management positions with P&G and Clairol prior to becoming a consultant, he knows the difference between theory and practice and invariably leaves his readers significantly better equipped to deal with the realities of the current marketplace. Details at www.hoyt.net.

Nancy Swift is vice president and co-founder of Hoyt & Company. Her extensive experience in advising consumer goods brand leaders on their sales, marketing, and trade challenges created a natural pathway for Nancy’s move into shopper marketing. Her background in consumer understanding, research, and data analysis proves key to synthesizing the interrelationships of brand, retailer, and shopper essential to best practice shopper marketing. Prior to founding Hoyt & Company, Nancy was the first female Managing Director of Consulting at Ryan Partnership and a research specialist at Glendinning Associates.

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Introduction

What Is This Book All About?

This book is about doing shopper marketing, with an emphasis on “doing.” In it, we provide an overview of key shopper marketing concepts as well as specifics on a formal process for developing shopper marketing programs. But what is this thing called “shopper marketing” anyway? There sure seems to be a lot of attention being paid to it despite everyone you speak with seemingly having a slightly different definition. Is it merely the latest fad in brand management? Is it merely marketing to shoppers while they are in the store, something retailers have been doing all along? Is it simply what merchandisers and manufacturer account managers decide to do in each store? No, it is not any of these. Shopper marketing is a new way of looking at business relationships between brand manufacturers, retailers, and the agencies with whom they work. Although, as you will read, shopper marketing as it is referenced today has only been around since the early 2000s, it is a discipline that has evolved from and emerged out of previous brand management, account management, and retailing practices.

Shopper marketing has exploded recently having a major influence on brand manufacturers and retailers alike. Associations such as POPAI (Point of Purchasing Advertising International), P2PI (Path-to-Purchase Institute), IIR USA (US division of the Institute for International Research), and others host large annual conferences dedicated to shopper marketing. There now exists an entire industry of shopper insights research companies, shopper and retail data analytics companies, and shopper marketing program ROI (return on investment) measurement companies. As of this writing, the LinkedIn Shopper Insights and Marketing Professionals discussion group has 34,700 members. And several books have been written on the topic. However, whereas previous books provide insights to various aspects of shopper marketing, none has offered a comprehensive set of processes for actually *doing* shopper marketing. That is where we come in. This book does not replace others that have preceded it nor does it replace the exponentially expanding volume of industry reports. It complements them.

We prepared this book to help you build a firm foundation in exactly what shopper marketing is and how to leverage your firm's assets to create the best shopper marketing organization, strategies, initiatives, and plans possible that have meaningful returns on their investments. Because many firms are learning very quickly, you must learn at a faster rate to stay ahead. So hold on, there's a lot to cover that's both exciting and challenging.

We are a unique group of three authors—two consultants who have been working with the best of the best in shopper marketing since its beginning, as well as running several agencies within this space over the last 30 years, and a marketing professor who has been teaching and researching customers and marketing strategies for more than 18 years. We bring a blend of both practice and scholastic research. Collectively, drawing on our expertise and that of others with whom we interact daily, we think we present to you the most critical aspects and latest thinking on state of the art shopper marketing. You will see the shopper marketing world through the eyes of those who have lived it—what works, why, and what doesn't. The scholastic view keeps us honest, objective, and rigorous. Let's face it, a great deal of research has been done over the years on retailing, shopper behavior, consumer behavior, branding, business-to-business relationships, selling, advertising, merchandising, and so forth. We rely on this research to support our recommendations in this book—we recommend what we know works.

So you may be asking, if people like us have been working with firms on shopper marketing for years and academics have been researching aspects of what we now call shopper marketing for years, why do we need this book? Quite simply—and in this case “simply” does apply—there are two reasons. First, no one has ever pulled it all together in a systematic way sufficient enough to lay a solid foundation for shopper marketing managers. Due to this problematic situation, shopper marketing positions are being created within organizations and filled by competent people, but people who may not have the tools and process knowledge necessary to be as successful as they could be. Second, there are still only a few companies, relatively speaking, that can be classified as advanced in shopper marketing management. Our aim is to increase that number significantly. The best of the best are manufacturing companies like Coca-Cola, PepsiCo and, specifically, the Frito-Lay division, Procter & Gamble, Nestlé, Unilever, Campbell's Soup Company, and ConAgra working with retailers like Target, Kroger, Safeway, The Home Depot, and Walmart, and agencies like Mars, TracyLocke, Integer, Saatchi & Saatchi X, and brokers like CROSSMARK. They draw on data from firms like Nielsen and dunnhumby. We have worked with these firms and many more like them across a variety of consumer goods companies. We can't reveal their secrets, but the foundational processes they all rely on are sharable. Even if you work for one of these outstanding

firms, you may have only recently even heard of the term “shopper marketing” and now you’ve been thrown into a job where you are responsible for part of it. Or maybe you work in part of the organization that is affected by shopper marketing, supply chain management for example, and you desperately need to know what’s going on. For all these reasons, this book should serve as your pillow for a while. Read it, think about it, apply it, and read it again. Soon you will find that you have a solid foundation and will begin to develop your own advanced slant on aspects of shopper marketing. This foundation may do more than help you create initiatives with high ROI for your firm, but may very well save your brands from complete demise.

We adopt a strategic view of shopper marketing. It is far more than merchandising tactics. Not that the tactics are unimportant. They are important, but only if they emerge from a strategic orientation. Our objectives for this book are to help you

- Understand what shopper marketing is and is not from both the manufacturer’s and retailer’s point of view.
- Understand why shopper marketing is here to stay and why both retailers and manufacturers have been quick to embrace it.
- Be able to develop, manage, and motivate a best-in-class shopper marketing organization.
- Be able to develop and implement a best-in-class shopper marketing strategic plan and initiatives.
- Be able to understand the challenges and opportunities for collaboration for (a) shopper insights, (b) strategic planning, and (c) program execution, including supply chain management support for shopper marketing.
- Be able to understand measurement and ROI trade-offs involved in strategic shopper marketing.

How Is This Book Structured?

We begin with an overview of shopper marketing and lay out the basic process through which we take you. We move the discussion to focus on who the shopper really is and how we study the shopper to understand opportunities and develop insights. We then provide an overview of how retailers operate followed by a review of how consumer goods companies operate. Many people with whom we work really don’t know how leadership at these two kinds of companies think and how often differences in their thinking creates tension for everyone involved. The next key topics focus on strategic planning, organizing for shopper marketing, execution issues that involve interfunctional and interorganizational coordination and collaboration, and measurement approaches.

We also present scholastic research in a unique way. At the end of most chapters, we present “Interesting Findings from Research” that provide some insights to specific, individual research studies conducted by marketing scholars that could be relevant to shopper marketing. You may not know it, but business academics at research universities around the globe spend at least 40% of their time and sometimes more conducting original research that ought to be helpful to industry. The best of this research draws upon sound theory, relies on rigorous research methods, and presents poignant findings. For more than half a century researchers have been conducting experiments, attitudinal surveys, ethnographies, interviews, and mathematical modeling to determine what works and why in all aspects of the marketing world. Not all the findings from research we offer will be relevant to you. In some cases, we present findings that are dated by business standards. We do this for a few reasons. In some cases, the findings are still valid. In other cases, we use a finding to demonstrate that a particular topic has been explored for a long time. Finally, some of the older research demonstrates how much things have changed and as such reinforces the point to conduct new research when it is warranted. However, most of what we present are merely examples from the last 10 to 15 years. There is a lot of research on shopper behavior, environmental and social cues, private label brands and brand equity, product assortments, segmentation, promotions, in-store advertising, mobile marketing, supply chain management, and so forth. Aside from the specific research findings, if you take away one key idea from the findings from research we will have been successful. That one key idea is to find a way to connect with academics conducting research relevant to your business and use them to remain abreast of current scholastic knowledge in the field. Shopper marketing is moving at too great a speed for you to waste time trying to answer questions to which we already know part or all of the answers.

Before we get started, let’s remind ourselves of the environment we marketers operate within today.

What Does the Landscape Look Like Today?

Brand management does not look the same as it did 15 years ago. Brand managers now spend a great deal of time not only worried about creating brand awareness and building brand equity with consumers, but also worried about what happens along the path to purchase as consumers turn into shoppers. They worry more about what happens in the retail environment. Brand manufacturers now segment consumers, shoppers, and retailers in entirely new ways as they tease out shopper need states, modes, and profiles.

Account management for consumer brand manufacturers does not look the same as it did either. The sales side of the organization has always tried to connect with the strategies and priorities of specific strategic retailers, but today they coordinate with brand management in greater detail and spend funds on a wider variety of media choices, both inside and outside the store itself. Collaboration is at a higher strategic level than ever before.

Shopper marketing advertising agencies have come into their own. What were smaller, niche firms have now become stars of the show. Shopper marketing agencies find ways to leverage shopper insights and brand equity along the entire path to purchase to connect with precisely targeted shoppers and activate purchases at the point of sale.

Market research now involves a heavy dose of shopper insights work, which differs from consumer research. How people shop for products differs from how they consume them. Although both have always been examined, a far greater emphasis than in the past is now focused on shopper research. Some of the most interesting research is coming out of neurology and behavioral economics. Additionally, “big data,” the science of data mining within large datasets (such as transaction data from retailers and loyalty programs), and the firms focused on conducting research in this space, has emerged as an industry in itself. We can now understand and target individual shoppers by the millions, whereas not so long ago we were focused on gross market segmentation—if we segmented at all.

Shoppers and shopping have changed. We now have a plethora of media choices for accessing information about products, services, and other shoppers. Social media alone presents shoppers with hundreds of options for connecting with each other, brands, and retailers. We don’t need to list them all here; you know their names because you use them—Facebook, Twitter, Pinterest, Google +, LinkedIn, we could go on and on. Besides, by the time this book hits printing, there will be many more choices. Of particular note: Media space is highly fragmented, and shoppers trust no brand as much as they trust the opinions of others whom they see as “like them.” Shopper marketers must tap into this social network as well as leverage and integrate all the other tools they have available, such as websites, mobile device applications, print media, cable, radio, experiential events, and so on to help brands and retailers connect with and converse with target shoppers in relevant ways.

We have different cohorts of shoppers who we must understand and to whom we must pay attention, cohorts like Millennials, multiculturals (in the United States anyway), and the growing Latino market.

All this has created a shopping environment where thematic programs and the hundreds of initiatives they spawn, such as Boxtops for Education, Back-to-School, Family Night In, helping first-time moms learn, or Game Time during the Super Bowl, are the norm. Shopping is expected to be far more experiential and in some cases social. Many of these programs involve more and more technology that does everything from entertain and educate shoppers to assist them in making purchase decisions. Brands are often expected to customize these programs for retailers such that the retailer is differentiated from nearby competitors. These shorter run, customized programs can wreak havoc on supply chain management and sometimes be quite costly. Therefore, more agile supply chains have emerged. Execution of these programs at the store level is problematic to say the least. Efforts to improve on consistent execution are significant. And finally, as the discipline becomes established, many firms are paying careful attention to the measurement of the return on investments made in shopper marketing programs.

As you can see, the marketplace for consumer goods branding, retailing, and shopping is extremely dynamic. However, successful processes for consistently developing impactful and profitable shopper marketing programs exist, and we present them in this book. We hope you gain as much out of this material as we think you will.

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