

WINNING THE WEEK

SHOPPER DRIVEN OBJECTIVES - SHOPPER-TARGETED TACTICS

Are manufacturers and retailers coordinating efforts to influence shoppers?

Retailer Advertising Expenditures

-0.2%

Retailer FSI Promotion

25.6%

Digital Coupon Events on Retailer Websites*

53.6%

Retailer Feature Ad Pages**

12.6%

Each of these tactics influence the shoppers path to purchase each week

Retailer advertising reinforces market position and brand equity with the shopper throughout



CPG Retail Industry CY 2013 % Change vs YAG
*Based on retailer websites monitored by Kantar Media
SOURCE: Kantar Media
**SOURCE: ECRM

FSI coupons engage shoppers at the critical period when they are writing their shopping lists and planning their shopping trips



Digital coupons on retailer websites increase purchase intent for the promoted brand while increasing shopper engagement with the retailer



Retailer feature ads influence shoppers both in the home as they plan their shopping trips and in the store as they make actual purchase decisions



SHARE OF VOICE - SHARE OF MARKET

Are manufacturers and retailers adapting tactics to effectively compete in your

	Retailer % Chg vs YAG	Advertising Dollars	FSI Promotion Pages	Digital Coupon Events	Feature Ad Pages*
MASS	Walmart	32.9%	30.8%	25.1%	43.7%
	Target	11.1%	91.8%	20.2%	10.6%
FOOD	Kroger	15.1%	0.4%	48.0%	9.5%
	Safeway	5.2%	136.2%	75.3%	-14.7%
	Supervalu	-31.4%	-58.5%	59.7%	-23.1%
DRUG	Walgreen's	-9.8%	49.3%	6.9%	0.0%
	CVS	-32.2%	-37.3%	9.7%	-9.3%
	Rite Aid	-6.5%	10.3%	181.2%	-2.0%

MASS: Walmart and Target increased activity across tactics; but Walmart widened the gap overall

FOOD: Kroger "antes up" across tactics; Supervalu scales back advertising, FSI coupons, and feature ads

DRUG: Walgreen's, CVS and Rite Aid all decrease advertising and increase digital coupon activity

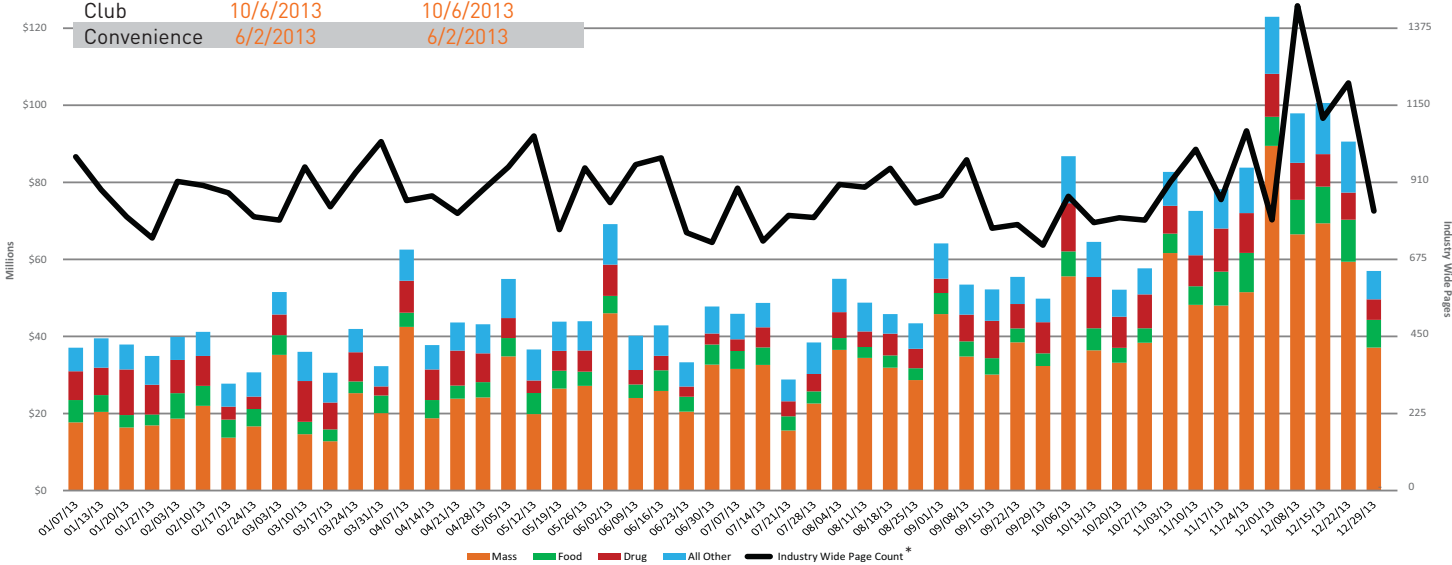
SOURCE: KANTAR MEDIA**SOURCE: ECRM
PERIOD: CY 2013

RIGHT MESSAGE - RIGHT WEEK

Are manufacturers and retailers efficiently allocating budget to win the right weeks?

Channel	% Voice Top Week	% Budget Top Week
Mass	11/3/2013	12/1/2013
Food	1/7/2013	12/22/2013
Drug	1/20/2013	10/13/2013
Pet	3/17/2013	10/6/2013
Value	1/27/2013	1/27/2013
Club	10/6/2013	10/6/2013
Convenience	6/2/2013	6/2/2013

Retailer advertising and promotion varies considerably by week directing shoppers to different retailers, different aisles and different brands.



SOURCE: KANTAR MEDIA/SOURCE: ECRM PERIOD: CY 2013 All Other = Club, Value, Pet, and Convenience channels

STRATEGIC ALIGNMENT - TACTICAL EXECUTION

- Which categories are strategically important to which retailers throughout the year while being tactically important to other retailers during key weeks?
- Are there more effective tactics which should be used to target stock-up trips at the beginning of each month than for fill-in trips to stretch the budget to the end of the month?
- How can brand marketing activity be leveraged differently by individual retailers to address seasonal promotion opportunities such as New Year's Resolutions, Summer Holidays, Back-to-School, Winter Holidays, etc.?
- Which manufacturer brands or new product introductions represent the greatest opportunity to generate sales while also reinforcing brand equity and retailer market position?
- Are there opportunities for retailers to more effectively align their advertising and promotion programs with leading brands' advertising and promotion activity and as a result more effectively capture trips and increase sales?

Aligning the right programs with the right retailers during the right weeks will improve the shopper's experience, as well as increase the strategic and tactical benefits of the collaborative programs

CONTACT MARX TODAY

Uncover trends in integrated media, retailer and manufacturer alignment along with competitive brand strategy and tactics by contacting us today.

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