

In-Store Marketing Effectiveness:

Allocating Investments and Managing Insights for Improved Performance

EXECUTIVE SUMMARY

- Study surveys more than 30 leading CPG companies to identify leading-edge marketing practices that improve the effectiveness of shopper marketing investments.
- Retailers increasingly demand a “fact-based approach” to program sell-in across the joint business plan.
- When allocating investments, CPG manufacturer “laggards” still take a “scattershot” approach, spreading budgets across tactics.
- Leading-edge CPGs serve their largest accounts but also focus on high-value customers in the mid-/small-size group, allocating appropriate time for program design/sell-in.
- Leaders use insights to determine tactics, focusing on trip missions, demand moments, shopper psychographics by customer, and how segments affect different customers.
- Some practitioners move beyond national- and customer-level insights and now generate them at the store-cluster level.

Written by the Institute in collaboration with



General Transparency & Coordination

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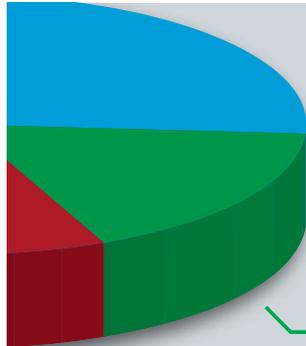
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ROI Not Sufficient



How do CPGs and retailers define “success” when it comes to their in-store marketing investments? More importantly, how can CPGs adopt leading practices to improve the effectiveness of shopper marketing investments and to realize shopper marketing’s potential as a broader commercial growth engine? Answering these critical questions was the goal of a survey of several dozen CPG marketing executives that was conducted in August 2014 by the Path to Purchase Institute and A.T. Kearney, under the sponsorship of Menasha Packaging. The study’s primary authors were A.T. Kearney executives Vishwa Chandra and Fabiola Salman, with the assistance of Gil Krakowsky and James Rushing.

These Kearney analysts see a growing gap in the effectiveness of shopper marketing activities across manufacturers due to changes in retailer dynamics, shopper behaviors and marketing service technologies. They’ve also observed that a small set of manufacturers already are driving fundamental improvements in brand performance while using shopper marketing and shopper insights to drive higher overall return on marketing investments and return on sales. This accelerating performance gap inspired them to undertake a survey to better understand which best practices are driving shopper marketing success. Respondents to the survey represented a variety of industries ranging from food & beverage to packaged goods; the functional areas represented included Shopper Marketing, Marketing Services, Merchandising, and Customer Development; and the levels of seniority ranged from vice president and directors to senior managers.

INTRODUCTION

If you were to ask A.T. Kearney’s clients how they define in-store marketing success, the answers would be spread across three dimensions, says Chandra, management consultant:

- Did it improve the brand’s overall presence on the shelf?
- Did it elevate the brand’s equity in the eyes of the shopper-customer?
- Did it generate a true ROI and generate incremental sales lift?

Designing the right set of shopper promotional programs is becoming more important in an industry

environment of declining promotion effectiveness, says Krakowsky, a partner at A.T. Kearney. He says that in a growing number of earnings presentations over the last three to six months, CPG companies have reported a significant or sudden drop in the effectiveness of their promotional dollars. “A huge part of this gap is due to a company’s tendency to couch short-term promotional tactics in a broader customer and shopper strategy,” he says. “Short-term promotions are important, but too often companies have a narrow-minded focus on just plowing in promotional funding to shore up sales, and this can be dangerous to the business.”



“Tactics are not bad, but a single-minded focus on simply executing them is dangerous to the business.”

Gil Krakowsky, partner, A.T. Kearney

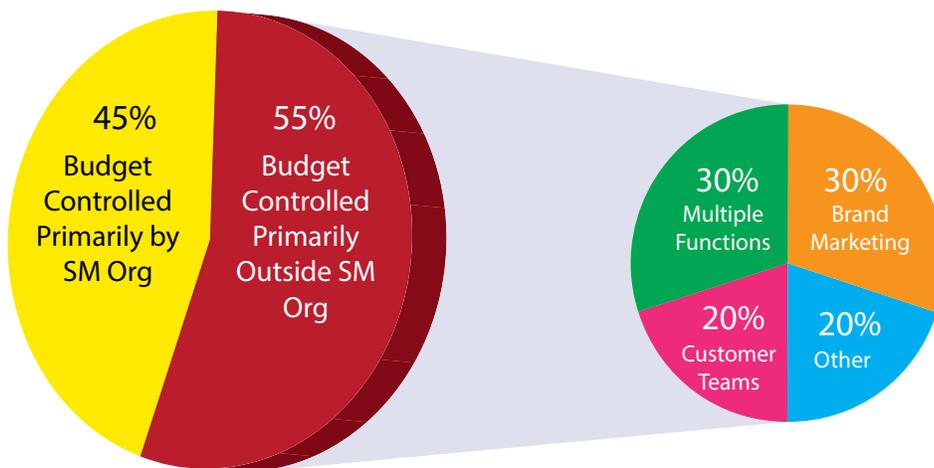
Obviously, shopper marketing programs need to accomplish goals like driving trial and reaching new shopper segments, Krakowsky says. “A well-designed shopper marketing program can have a ‘force multiplier’ effect on other programs.”

But shopper marketing programs should also help build strategic relationships with retailers, independent of the effectiveness of the actual program. When used effectively, they can improve the sell-in and execution of a broad array of sales and marketing programs. And that’s where, according to the survey results, the gap in promotional performance across manufacturers may be widening.

UNSTRUCTURED BUDGETING

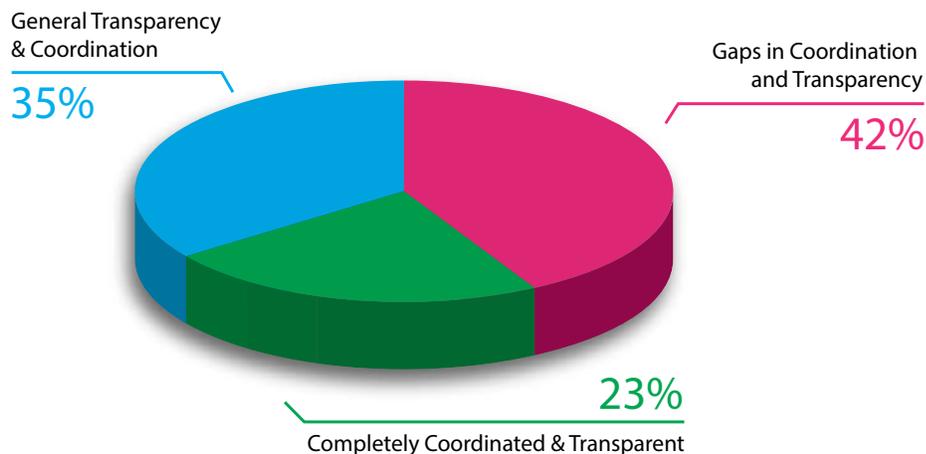
The growing gaps in shopper marketing effectiveness are driven, in part, by the differences in manufacturers’ abilities to create synergies across various shopper-focused promotions. This is especially true because different promotions are often controlled by different parts of the organization. “From our experience with both CPGs and retailers,” says Paul Murphy, senior director of retail sales & new business development, Menasha Packaging, “the top organizations know how to align their operations to stay focused on the shopper and create ways to uniquely engage her where she lives.”

How is your shopper marketing budget controlled?



More than half of respondents to the P2PI/A.T. Kearney survey said their shopper marketing budgets were not controlled by their shopper marketing organizations.

Is there coordination across shopper marketing investments from different parts of your organization?



Only 23% of survey respondents said their shopper marketing investments were “completely coordinated and transparent” across the different parts of their organizations.

Source: P2PI/A.T. Kearney “End-to-end In-Store Marketing Development” Survey, August 2014.

However, more than half of survey respondents, 55%, indicated that their shopper marketing budget is not primarily controlled within their shopper marketing organization. Of that 55%, 30% placed it within brand marketing and 20% within customer teams.

Perhaps not surprisingly, nearly half of respondents, 42%, indicated that coordination and transparency gaps exist across shopper marketing investments from different parts of the organization.

A.T. Kearney considers that 42% figure “to be a massive underestimation,” Krakowsky says. Said one re-

spondent from a marketing services provider, “It’s not uncommon to find that brand has signed a Catalina contract, sales has sold in a feature and display promotion, and shopper marketing has commissioned a program with us – all without them knowing about each other.”

Added a food and beverage integrated marketing executive, “There are times when we act as if trade promotions, shopper marketing and brand communications are going to be seen by completely different people.”

Krakowsky believes that the recent declines in promotional effectiveness can be attributed, in part, to structural fragmentation. "Money is coming from different places, programs are not well-coordinated, and it's confusing to the shopper."

Manufacturers that continue to struggle with such coordination issues, he adds, have experienced lower returns from shopper-targeted programs, lower synergies between shopper and trade promotion activities, and less cooperative retail partners, who are starting to close down because they are often just as confused as their shoppers by all of this uncoordinated activity.

MAKING THE RIGHT INVESTMENT

"The 'shopper experience' has now reached a new and

more sophisticated level of importance," says Wes Jones, RII director-Costco, Menasha Packaging. "Extreme SKU rationalization is now a part of everyday life, and CPGs have a new challenge in understanding the shopper and customizing the right vehicle to build brand awareness, drive brand loyalty and to deliver ROI."

The survey, however, shows that gaps remain among manufacturers in how brands allocate their investments across retailers, programs and tactics. The vast majority (84%) said they primarily used retailer size and growth. Only around half (52%) use some type of measured ROI in allocating investments. Survey respondents also reported a large variance in the quality of ROI tools available. Only a few brands reported an ability to strategically allocate shopper marketing dollars across retailers in a way that drives the most impact with priority shopper segments (35%).

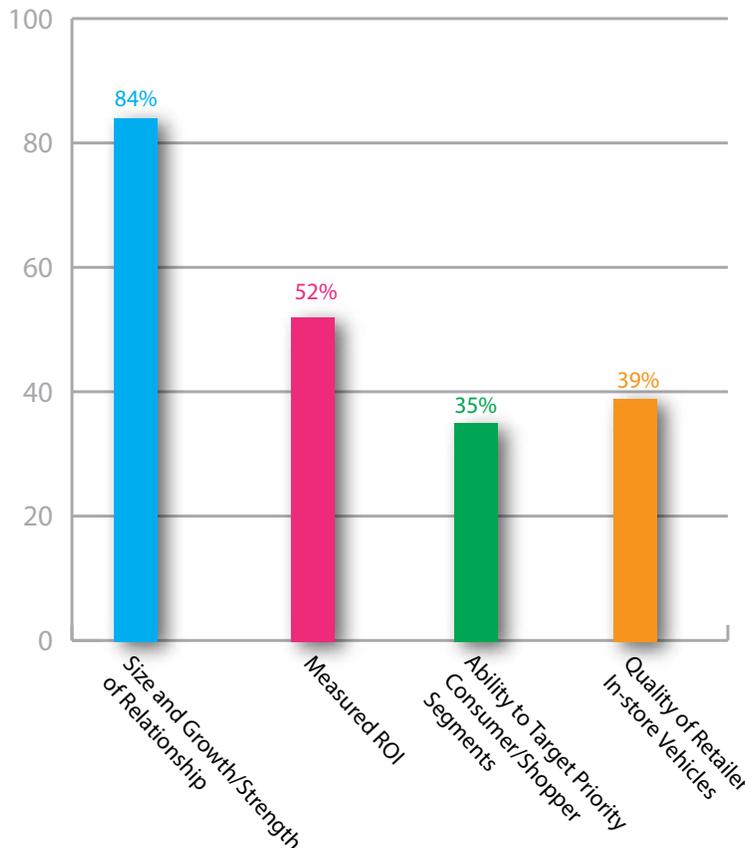
"We still often lack the tools to understand what lever to pull along the path to purchase, and what tactics to use in pulling those levers," said one shopper insights lead at a personal care manufacturer. "As a result, we often peanut butter-spread our dollars across a mix of levers and tactics."

In other words, Krakowsky says, they allocate to the "biggest or squeakiest wheels, leaving small scraps of the budget for remaining customers and channels. However, manufacturers that can systematically assess ROI across programs are able to allocate funds in a way that creates better business results."

Said one shopper marketing director at a personal care manufacturer, "We have been trying to measure event-level ROI, at least for large programs, for years, but we weren't using those results to tweak which customers we were placing our budget dollars with. We now have a predictive ROI model that will allow us to adjust where we are placing our bets in a way that improves returns."

A smaller number of industry-leading organizations also will overlay shopper segmentation with customer segmentation. This not only provides customer demographics but also enables them to zero in on the specific "demand moments" in the customer experience that they want to target. They can then combine that information to allocate budgets accordingly and, as a result, generate high ROI. If you know what shopping occasions or 'demand moments' will

Which factors most often drive your investment allocation across different channels and customers?



Source: P2PI/A.T. Kearney "End-to-end In-Store Marketing Development" Survey, August 2014.

When allocating investments across programs and tactics, the vast majority of respondents (84%) said they use the size and growth of the retailer or channel, and slightly more than half (52%) cited measured ROI.

drive profitable growth, and you know what retailers to invest in to gain a greater share of those segments, then you'll know where you want to put funding. And those that follow this practice will demonstrate better ROI than their peers.

Chandra says that only a small number of shopper marketing organizations use ROI to drive their decision-making processes. "When everyone's resources are constrained, being able to articulate 'the value of our organization' becomes important - that's where ROI comes in."

CLUSTERING THE INSIGHTS

Nearly two-thirds of respondents reported that their companies use national-level insights (65%) or customer-specific insights (65%) when allocating investments. But only 31% reported using cross-channel or cross-retailer insights, and a mere 12% said they break their analysis down to the store-cluster level.

"There's a huge opportunity for shopper marketing organizations to start building this capability," Chandra says.

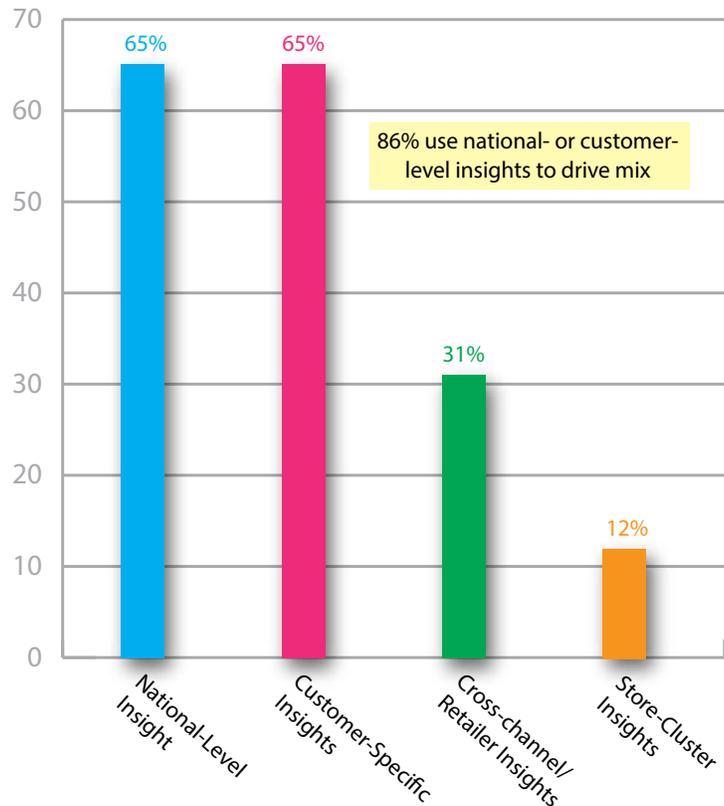
The next level up, "store cluster" insights, does not necessarily mean groupings that are geographically near one another, although it can. "But a store in Atlanta might be much more similar in customer behavior to a store in Chicago than one in nearby Marietta," Krakowsky says. "It has to do with who shops there, what their trip missions are and how they shop. You shouldn't plow money into a set of tactics that's not aligned with the results gleaned."

For example, national-level insights may indicate that a brand is challenged to get on Mom's shopping list, so a set of "planning phase" tactics may be appropriate. However, there may be a set of store clusters where "grab & go" impulse-buy occasions predominate. A cluster-level view allows brands to avoid making the wrong investments for these store clusters, so they can align investments in the right tactics with the right business opportunities.

As retailers become more sophisticated, manufacturers need nuanced data to keep the conversations going, Chandra says. "It takes a special ability for a CPG to go to an Ahold and say, 'We recognize that your New Jersey customers are different from Long Island.'"

During the past five years, it's become standard op-

What insights are used to allocate investments across different shopper marketing programs and tactics?



Source: P2PI/A.T. Kearney "End-to-end In-Store Marketing Development" Survey, August 2014.

Two-thirds of respondents said they use national-level insights (65%) or customer-specific insights (65%) to allocate investments. But only 31% use cross-channel or cross-retailer insights, and just 12% get down to store-cluster levels.

erating procedure for retailers to demand that manufacturers use - and, of course, buy - their loyalty data, Krakowsky says. But in many cases manufacturers are wasting money buying expensive loyalty data without building the capability to use it strategically, he says. One food & beverage company was "buying loyalty data from tons of customers, yet their customers were rating them poorly," he says. What was wrong? "Their shopper marketing and category-management teams were poorly trained and equipped, and spent all their time cranking out endless streams of ad hoc performance reports." Lacking the skillsets or bandwidth to use the loyalty data to paint a strategic picture of the brand and category within the customer's overall business, discussions between the customer team and the retailer remained very tactical and margin-focused.

Loyalty data has become the 'currency for conversation' between many retailers and brands, diminishing the traditional reliance on brands to provide category insights. Leading-edge brands have started to respond by creating their own proprietary cross-retailer data and using the resulting insights to sell-in new programs that can drive both brand and retail banner business growth. "Retailers prefer to speak with their suppliers using their own loyalty data, but one thing that data can't do is understand channel or retailer switching by shoppers. For a brand to use this data and provide insights on how to drive a retailer's business in a mutually beneficial way, that becomes a pretty powerful tool to sell in new programs," says Krakowsky.

MID-SIZED ACCOUNTS COUNT

The survey showed that most respondents feel confident that they equip their sales teams with quality customer sell-in materials for large accounts (78%), but are less focused when it comes to medium-sized accounts (56%). "Shopper marketing organizations spend most of their time with the top three or four accounts like Walmart or Kroger," Chandra says, "but they continue to underserve mid-sized accounts that still account for a large portion of the retail industry and significant untapped growth potential for many manufacturers."

With medium-sized retailers, which Chandra defines as those with \$10 billion to \$30 billion in sales, the accounts and therefore the attention is usually split and that affects a company's ability to focus. And for small regional players (\$3 billion to \$10 billion range) like Price Chopper, even though they may be very significant in their own markets, "You scramble to get whatever resources you can. And when budgets are tight, those are the folks who get squeezed the most."

"The large manufacturers are playing in a truly mature space with their primary customers," Krakowsky says. "For example, in food and beverage, the U.S. market may only be growing at around 1% a year. The reason why clients start looking at mid-sized customers is that duking it out at Walmart and eking out a couple basis points of growth is trench warfare. Instead, you can unlock new sources of growth by selectively taking action against a set of mid-sized retailers and finding 100 to 300 basis



points of growth that you'd never find at the big guys."

Those manufacturers that have been successful at using shopper marketing and promotions to unlock growth with mid-sized customers tend to do a few things well:

- They understand which mid-sized accounts are the biggest opportunities and allocate their investments there.
- They determine an efficient model to serve them, as resources and scale will not match larger account teams.
- They embrace emerging, lower-cost tools for testing programs, generating insights and monitoring execution.
- They build repeatable "playbooks" for building the retailer sell-in tools that their customer teams need.

TESTING TO OPTIMIZE

The P2PI-A.T. Kearney survey suggests that CPGs and retailers have some distance to travel when it comes to designing programs that will optimize shopper marketing ROI. Both the frequency and sophistication of consumer testing is quite limited overall, for example, with manufacturers using consumer testing to optimize program design and messaging less than half the time, even for large programs.

Testing frequency and sophistication is a major factor that separates the most effective manufacturers from the pack, Krakowsky says, listing four other attributes they possess:

- "One is a willingness to leverage emerging technologies like online panels, which often are quick and dirty ways to get an early read on a program's effectiveness. These tools also allow them to test more often for a broader set of programs."
- "They work actively with their suppliers to better leverage P-O-P displays and are willing to rely on the insights and testing capabilities of companies like Menasha."

"There are times when we act as if trade promotions, shopper marketing and brand communications are going to be seen by completely different people."

integrated marketing executive

- "They work with their customer teams on a promotional planning process that's in sync with the retailer's planning process so they actually have time to test and everything isn't rushed out the door."



"The top organizations know how to align their operations to stay focused on the shopper and create ways to uniquely engage her where she lives."

Paul Murphy, senior director of retail sales & new business development, Menasha

- "Even when they can't do testing for mid-sized and smaller programs, their customer teams excel at customer-driven selling, allowing them to apply the lessons from previous tests."

TAILORING & SCALING PROMOTIONS

"Retailers are much more structured in their promotional planning process than they were before," said one survey respondent, a customer team lead at a food and beverage company. "They now demand visibility to and specifics on major programs within our regular category review cadence and not as per our schedule. And our ability to sell in a program will drop three to four times if we are outside these predefined windows."

Krakowsky says that in the past, the promotional arsenal was built around:

- **One-off tactical promotions;**
- **Large national promotions** aimed at, for example, the back-to-school time frame with moms and kids in mind. "That's all well and good for some customers," he says, "but certainly won't resonate with others, and may be out of tune with how some retailers want to grow their business."
- **Large account- or customer-specific programs.** "These are large, strategic projects and are the ones that tend to garner agency awards," he says. "But manufacturers will do no more than a handful of these per year. They create a lot of industry buzz, but are not the primary way in which shopper marketing programs are designed and funded."

Today, a lot of effort is being focused on creating national programs that are tailored to individual customers. The problem, Krakowsky says, is too often the "tailoring" means just force-fitting something into a schedule with no obvious strategic alignment for the customer's business.

Furthermore, according to survey respondents, while retailers are involved more than 80% of the time in the annual planning, only 50% get involved in the

actual program design. The numbers are even lower for projects involving mid-sized customers.

What's more, aside from the annual planning process – "where everyone tends to talk in generalities and grand designs," according to one executive – retailers only get to see the full program during the sell-in phase.

Some CPGs will try to take a national program and tweak it a bit for a specific account – changing a logo, modifying the offer, or customizing it from a menu of selected options. "The challenge with tweaking is that retailers have gotten more sophisticated," Chandra says. "They keep asking, 'How is this building incremental volume at my store, as opposed to my competitors?'"

One survey respondent, the head of sales for the grocery channel at a food and beverage manufacturer, said, "We have this national shopper marketing organization that is constantly generating materials about general trends and shopper insights. Our customers look at those with suspicion. They don't believe the insights apply to them, and it makes them feel like we are force-fitting, instead of tailoring programs to suit their needs. Our customer teams are often frustrated by how weak and generic those materials are."

CPGs will find a more flexible middle ground if they create a less specific "platform" for a product and build customized promotions for particular retailers off that base, Krakowsky says. "When you get it right, it's a lot more efficient to execute a platform. You're not force-fitting a national program with a bunch of quick fixes at individual retailers but developing one platform that can be adapted in many ways." This best practice approach involves developing a set of cohesive, scaled programs that enable shopper marketers to focus their limited resources on a smaller set of more powerful work, he says. Organizations that can develop strong platforms at the national level that can then be customized – with the right insights – will indeed differentiate themselves as long as these investments are integrated back into the central brand communication.

Krakowsky says that Johnson & Johnson's "First-Aid Kit" concept is a good example of a platform that has this kind of flexibility. It can be focused on soccer moms in mass channels who want to be ready when their kids have the need, the "active weekend warrior" when he's cycling, or seniors recovering from a medical procedure. "You can see how the benefits and barriers of that campaign could be adjusted slightly to be applicable to other demand moments. These platforms can be tailored correctly based on the shopper segments and growth priorities for each retailer."

Successfully creating such flexible national programming does require a strong feedback loop from customer teams who can articulate strategic needs and growth priorities, as well as customer-level shopper marketers who can understand and activate the brand strategy.

Shopper and brand organizations should be more demanding of their sales teams, who should be able to articulate the retailer's strategic needs and use insights to sell-in programs effectively, says Krakowsky. Sales teams, on the other hand, should be more demand-

ing of their shopper marketing, insights and cat-man organizations. They should demand that programs be tailored to their customer's strategic priorities, and ask for insights-driven selling tools that will resonate with the customer. Manufacturers that are effective at getting both sides of this equation right are reporting significant improvements in their business performance relative to peers.



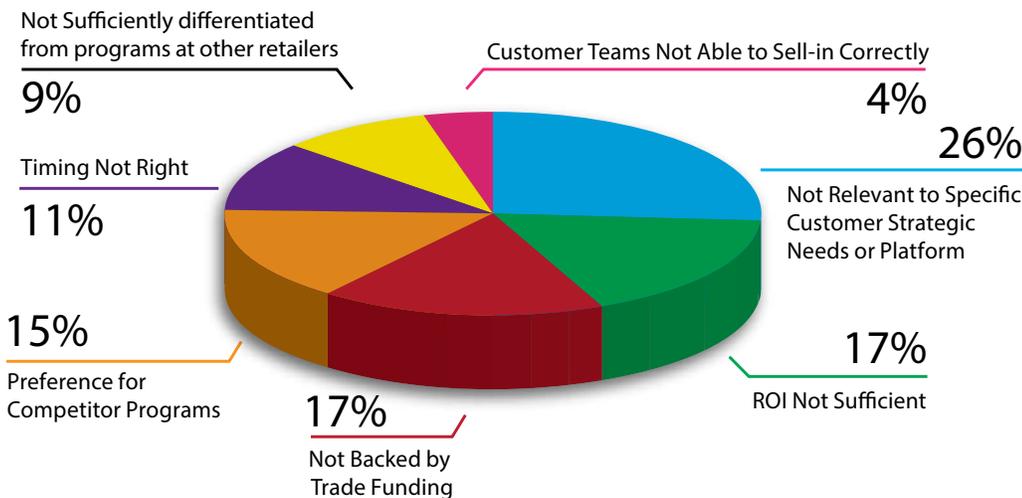
"Shopper marketing organizations spend most of their time with the Krogers of the world, but mid-sized is still a large portion of the retail industry."

Vishwa Chandra, management consultant, A.T. Kearney

ILL-EQUIPPED FOR BATTLE?

"One of a CPG's biggest challenges," says Kerry Bailey, senior director-Walmart/Sam's Club global support team, Menasha Packaging, "is elevating its brand equity through broad strokes while converting shoppers inside the retailers' stores. As they work across an effort, customer sales teams, shopper teams and brand

Why don't customers accept your programs?



Customers most often refuse to accept programs because they consider them irrelevant to their strategic needs. Among other reasons cited were "ROI not sufficient" and "it's not backed by trade funding."

Source: P2PI/A.T. Kearney "End-to-end In-Store Marketing Development" Survey, August 2014.

teams need to make their message recognizable, sure, but they absolutely must share the retailer's story with the shopper as well."

Indeed, retailer customers most often refuse to accept programs, according to 26% of survey respondents, when a chain believes that it isn't relevant to its strategic needs.

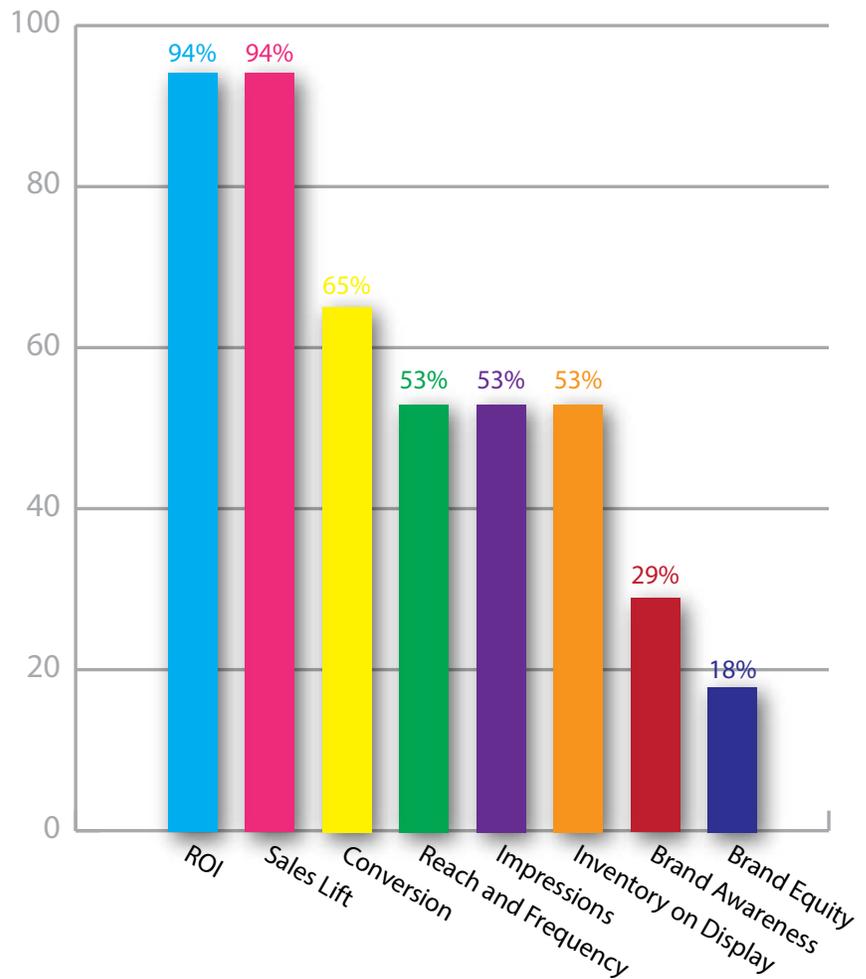
Part of this is the result of the force-fitting and re-tweaking of programs, Chandra says, but a lot of it comes down to practical issues of timing and making sure calendars line up.

"These practical constraints require CPGs to be more nimble and flexible internally," he says, "but finding alignment is challenging when the 'top-to-tops' are only meeting annually or for special occasions like the Super Bowl. Then suddenly, it's mission silence until two weeks before they have to sell it in."

Overall, the survey found that a majority of shopper marketing teams believe their sales teams are properly equipped with sell-in tools (especially for large accounts). However, only half felt that their sales teams are using the tools effectively. "That sounds positive, but we think they're being a little polite," Chandra says. And this data point is a double-edged sword since it means half of the respondents believe their customer teams struggle to sell in the right programs.

Krakovsky notes that shopper marketers' assessment of the quality of their own sell-in tools may also be exaggerated. "Sales executives from a number of compa-

What metrics are used to track success?



Source: P2PI/A.T. Kearney "End-to-end In-Store Marketing Development" Survey, August 2014.

Virtually all respondents track ROI and sales lift (94% apiece), but relatively few keep track of longer-term indications of strategic impact like brand awareness (29%) and brand equity (18%).

nies have expressed frustration to us that their shopper marketing organizations are not doing more to help the customer teams with insights-driven selling," he says.

More progressive organizations have elevated the role of their shopper marketing organizations within the customer team. With that enhanced role, not only do shopper marketers support the sell-through of their own programs, they

"Extreme SKU rationalization is now a part of everyday life, and CPGs have a new challenge in understanding the shopper and customizing the right vehicle."

Wes Jones, RII director-Costco, Menasha Packaging



also act as champion of insights-driven selling using a path-to-purchase framework. In doing so, they improve the output of many initiatives from trade promotions to joint business planning and even customer-driven innovation.



“One of a CPG’s biggest challenges is elevating its brand equity through broad strokes while converting shoppers inside the retailers’ stores.”

Kerry Bailey, senior director-Walmart/Sam's Club global support team, Menasha

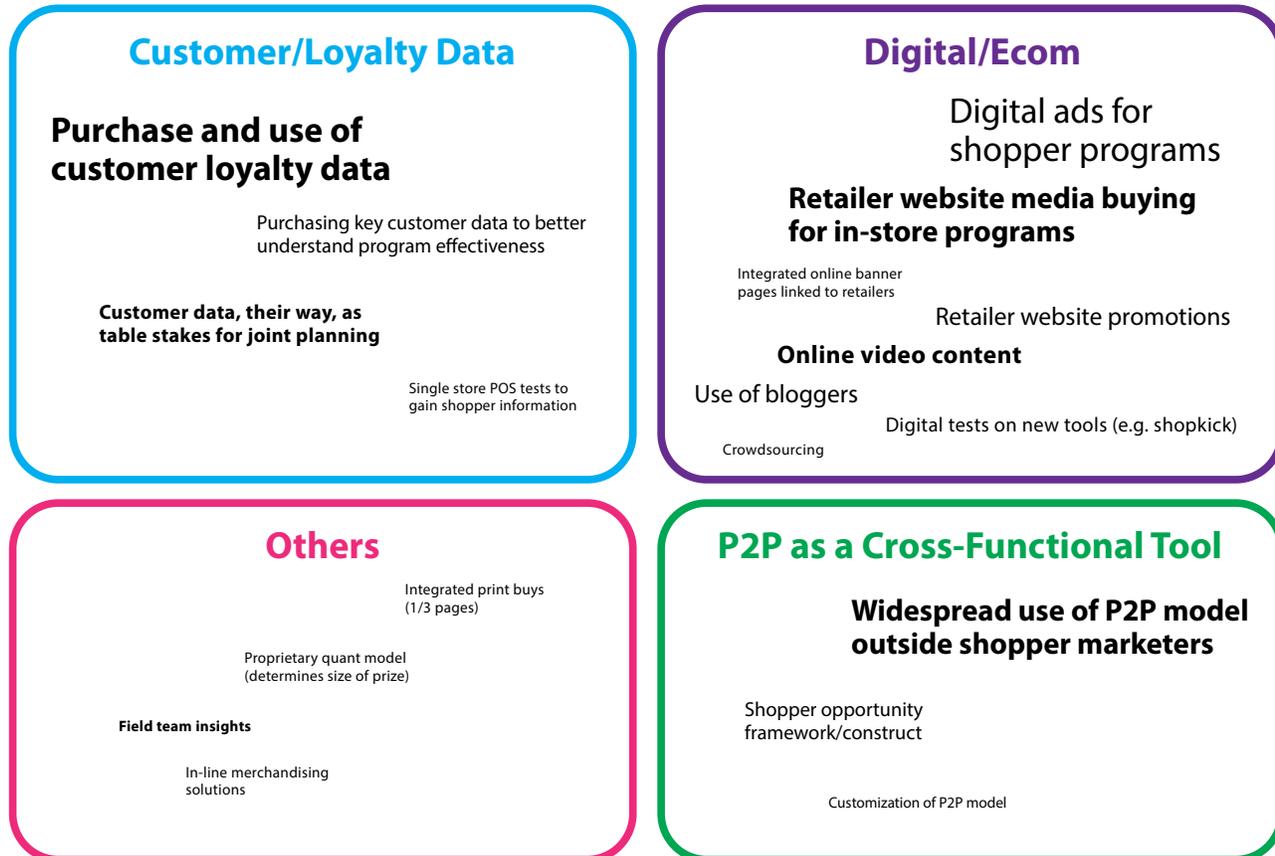
One shopper marketing lead at a food and beverage manufacturer responded to the survey by saying that his company had indeed given him the proverbial “seat at the table.” In fact, his organization has been enlisted as a “champion to build insights-driven selling capabilities across our customer teams. As a result, not only does the shopper marketing organization help build and sell-in its own programs, it

has an impact on everything from improved joint business planning to better trade effectiveness.”

MONITORING THE PROGRAM

The majority of shopper marketers continue to rely on traditional techniques to monitor execution of programs, although a growing number of leaders are

Which solutions or tools went from ‘test & learn’ to ‘mainstream use’ in the last two years?



Source: P2P/A.T. Kearney “End-to-end In-Store Marketing Development” Survey, August 2014.

starting to use next-generation tools, both in the field and through cyberspace, to track execution across a broader number of programs and customers.

The survey showed that nearly half of respondents use store audits (48%) and syndicated data (45%) as CPGs have done traditionally. A smaller number of leading manufacturers are increasingly using field team reporting tools (29%), social store audits (26%) and shopper tracking (19%) to this end.

These new emerging tools and methods greatly increase accuracy and insight that helps to inform program design, Chandra says. "We think manufacturers using emerging technologies like social store audits get richer data at lower cost, and can therefore use these tools effectively to improve a broader range of programs across a broader range of retailers."



AN EVOLVING LANDSCAPE

As a final step in the survey/interview process, respondents were asked to name two or three solutions or tools that went from "test and learn" to mainstream use in the last two years. They singled out three items:

- digital and e-commerce;
- the purchase and use of customer and loyalty data; and
- the use of the path-to-purchase as a cross-functional tool.

Manufacturers have, for the most part, been unprepared for the speed at which digital marketing and e-commerce have become important to competitive success, Krakowsky says: "Teams not equipped to be effective in an e-commerce-focused shopping world, that don't have digital capabilities and don't know what partners to work with ... honestly most are flailing."

The purchase and use of loyalty data has gone mainstream rather quickly as well, Krakowsky says. "But many manufacturers still don't know whether to buy that data or not and when to use it effectively." A pilot project with one large CPG showed that the company's category management resources were swamped with non-strategic, often duplicate requests for basic sales reporting. A restructuring of those cat-man roles gave the manufacturer a clear competitive advantage leveraging that data, resulting in measurable improvements of sell-through rates and ROI.

"The most common currency of dialogue is usually

"Our national shopper marketing organization is constantly generating materials about general trends and insights. Our customers look at those with suspicion and our customer teams are frustrated."

head of sales, grocery channel, food & beverage mfg.

loyalty card data," Krakowsky says. "What is typically powerful for a retailer is when the manufacturer uses that data to demonstrate how a program could potentially create improved trips, improved penetration and improved basket size coupled with other purchases for a target shopper group." But because this type of data is specific to each chain, manufacturers increasingly must create their own cross-chain proprietary data sets in order to develop unique insights.

And in this challenge lies the opportunity for manufacturers to reclaim their role as a strategic business adviser to their retailer clients. "The ability of manufacturers to bring cross-retailer data, showing the drivers of winning those shoppers, is something that becomes very compelling to retailers," Krakowsky says. "The other thing that's very compelling to them is when the manufacturers can use the retailers' own data, but in a differentiated way when designing programs." ■



Menasha is a packaging and merchandising solutions company focused on optimizing the retail supply chain. Menasha collaborates with the world's leading retailers and consumer packaged goods companies to deliver the greatest measurable value across the entire integrated merchandising supply chain. As market leaders within the in-store merchandising industry, Menasha combines an unmatched understanding of the retail sector with a proven methodology for developing efficient, sustainable offerings to meet customer-specific goals. As a total turnkey solution provider, Menasha offers products and services that include P-O-P displays, graphic packaging, folding carton, P-O-S signage, assembly, pack-out and distribution. As a preferred supplier we have on-site employees at multiple CPGs and retailers which enable us to provide enhanced service and support to our customers because we are fully integrated into their systems and processes and understand the retailer's requirements. Menasha's design capabilities and unique ability to blend and deliver the lowest total landed cost, greatest speed to market, and innovation enables its customers to reduce costs and increase revenue.



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The Path to Purchase Institute is a global organization of brand marketers, retailers, agencies and manufacturers focused on improving retail marketing strategy worldwide. The Institute serves the needs of its membership by providing information, research, education and training, networking opportunities, trade publications and a trade show designed to further the understanding, acceptance and effectiveness of in-store marketing. For more information, go to www.p2pi.org.