

Measuring in-store marketing in retail

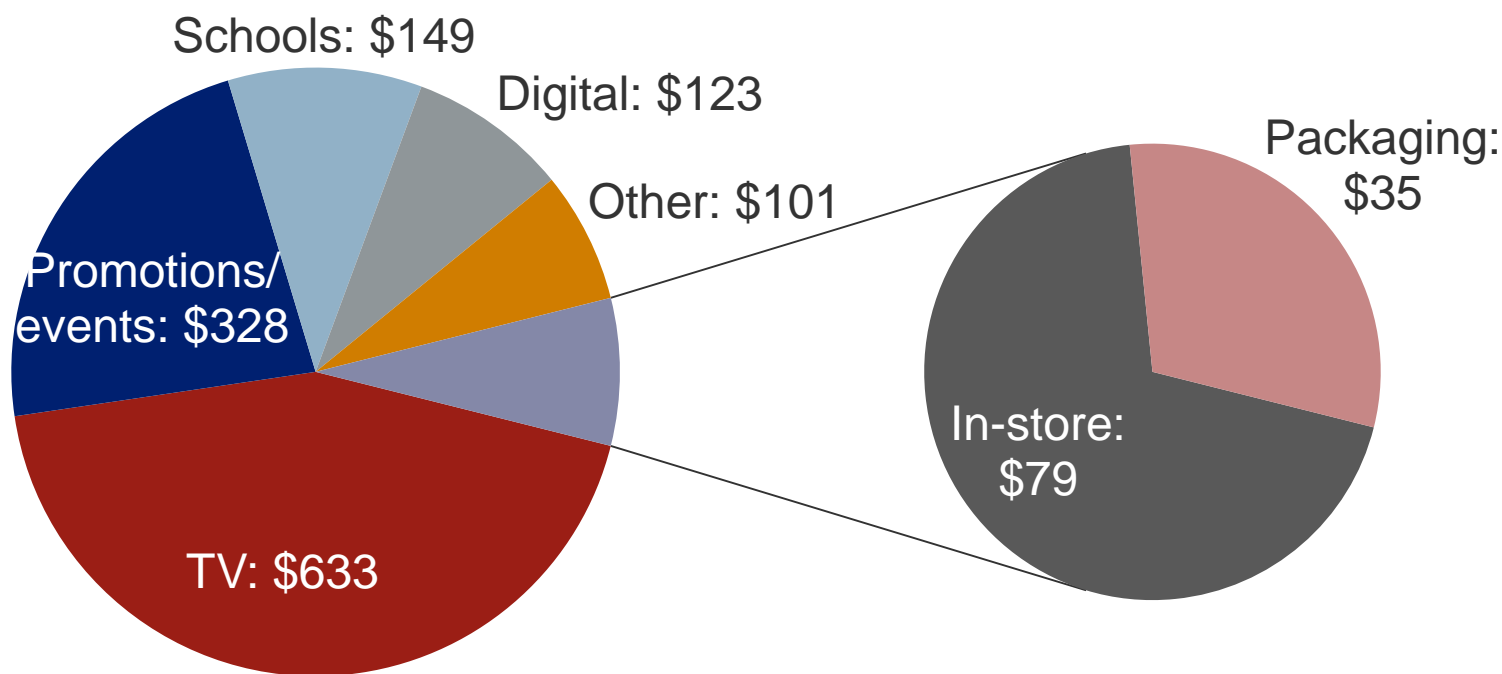


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Targeted marketing expenditures

2009: \$1.8 billion total



Source: FTC 2012 *Excludes cost of kids' meal toys

In-store marketing techniques

- Shelf placement
- Special displays
- Price promotions
- Product packaging

Research methods

- Commissioned field agents
- Syndicated data
- Online workers
- Research personnel store audits

Four types of analyses

- Cereals
 - Shelf placement, special displays and price promotions
- Fruit drinks and juices
 - Special displays and price promotions
 - Incremental sales
- Lunchables
 - Shelf placements
- Product packaging and claims

Cereal marketing in stores

- Commissioned audit of 400 supermarkets
 - Reps visited stores 5 consecutive weeks
- Shelf space allocation (week 1)
 - Facings and location (top, middle, lower)
- Promotions (weeks 1-5)
 - Displays (end-cap, in-aisle, other)
 - Price (including coupon machines, dangles)

Shelf placement and facings

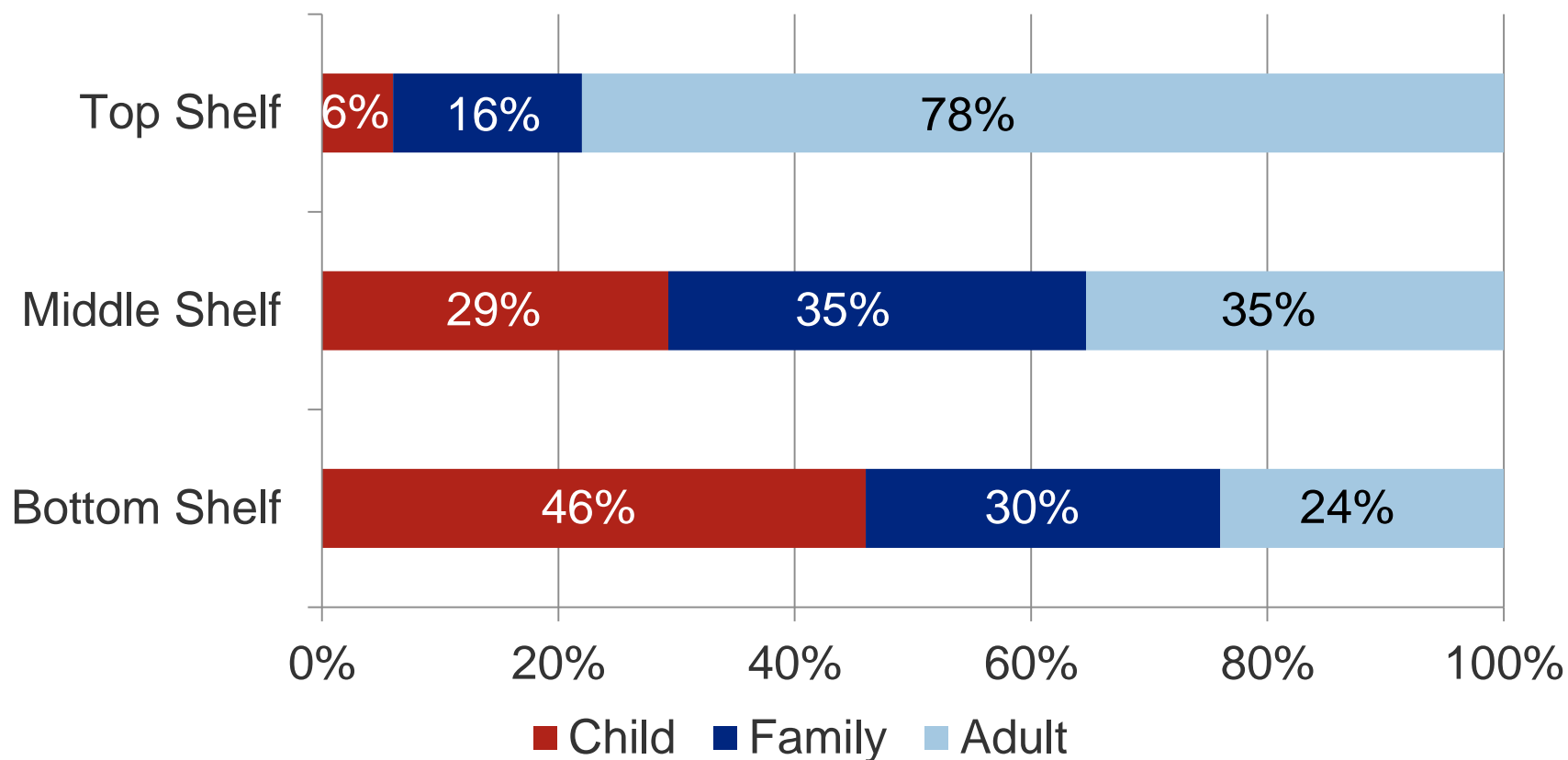


Prime shelf locations



Shelf composition

Allocation of facings by shelf

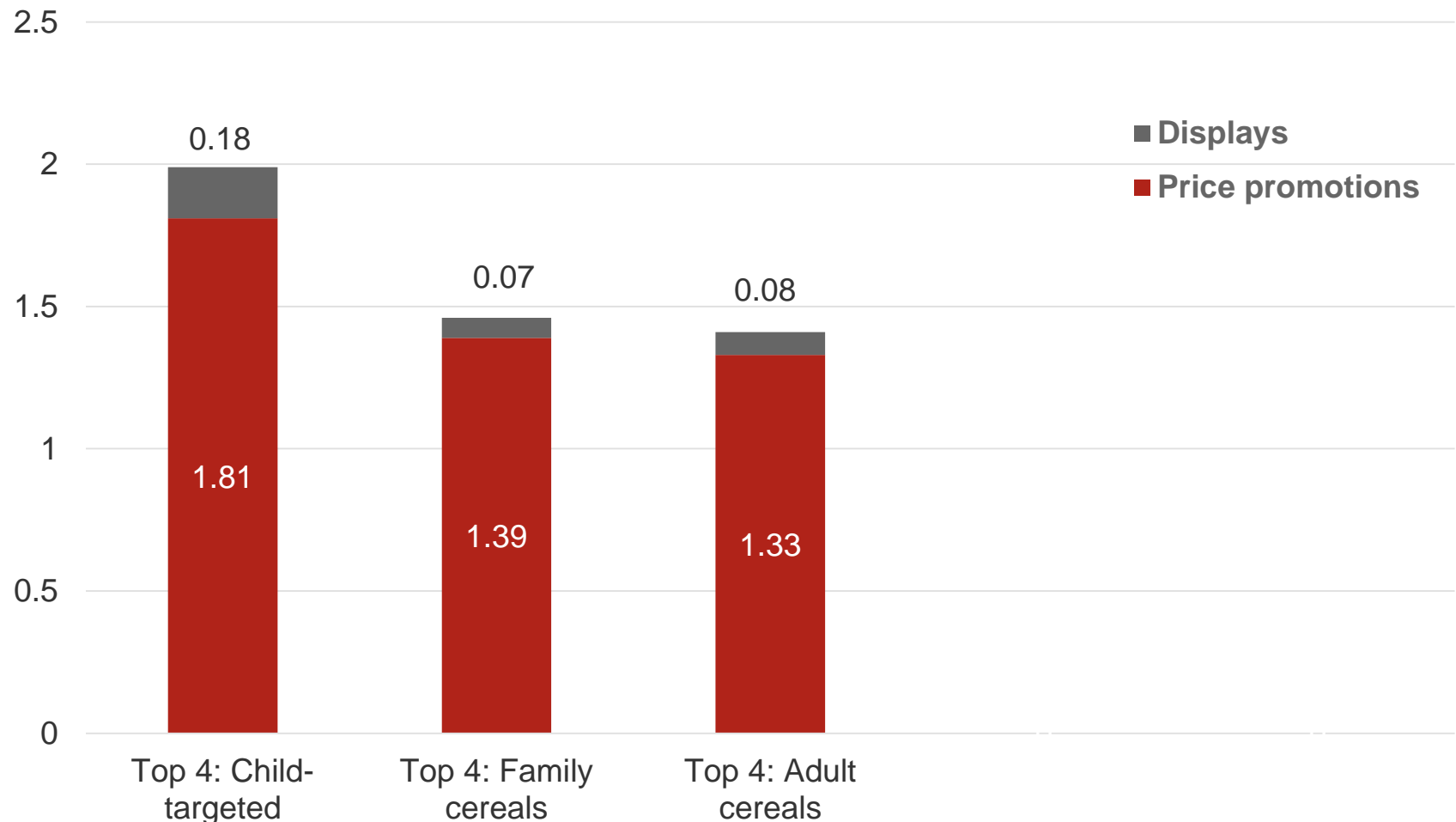


In-store promotions



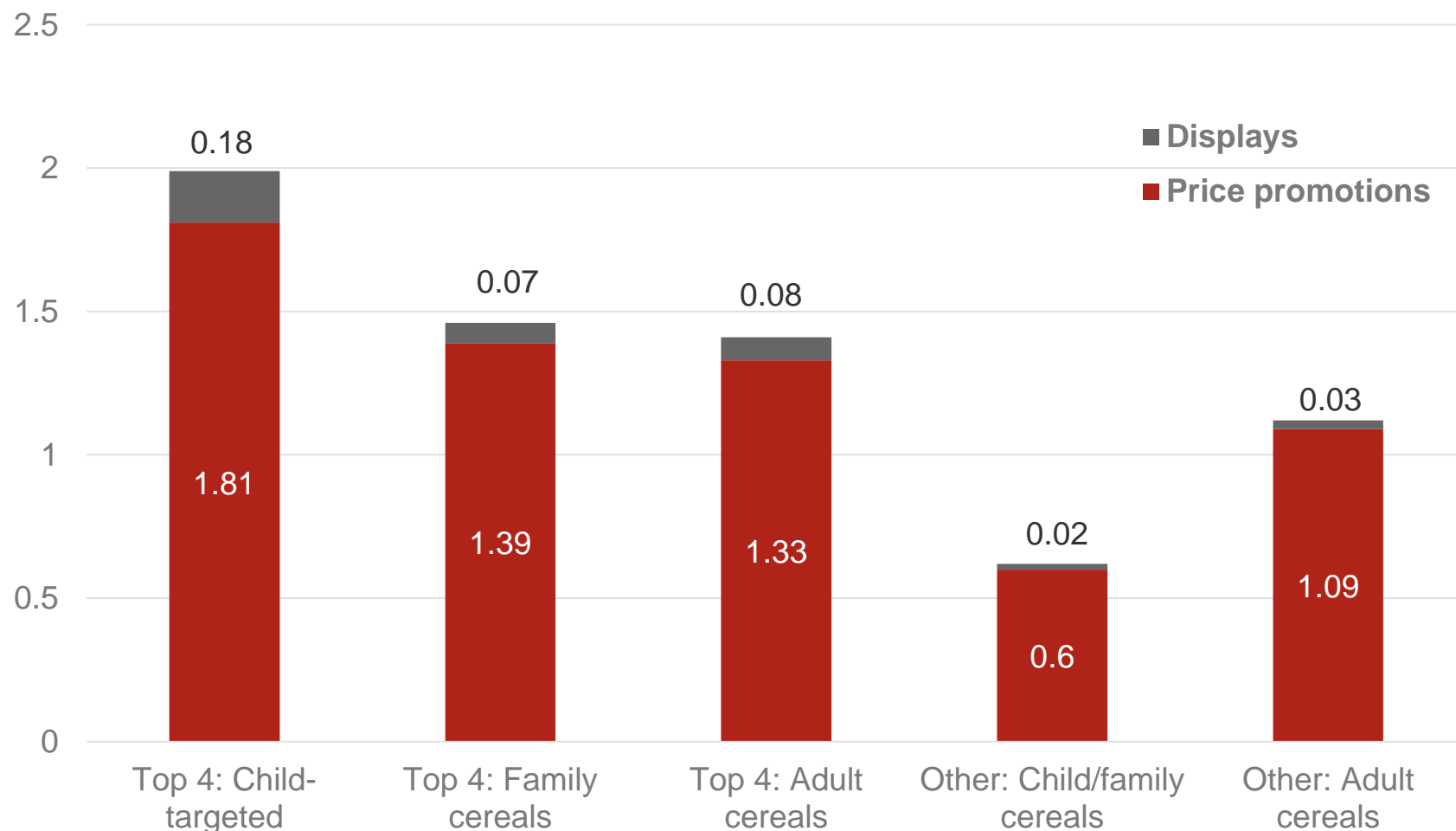
In-store promotions

Promotions by company and cereal type



In-store promotions

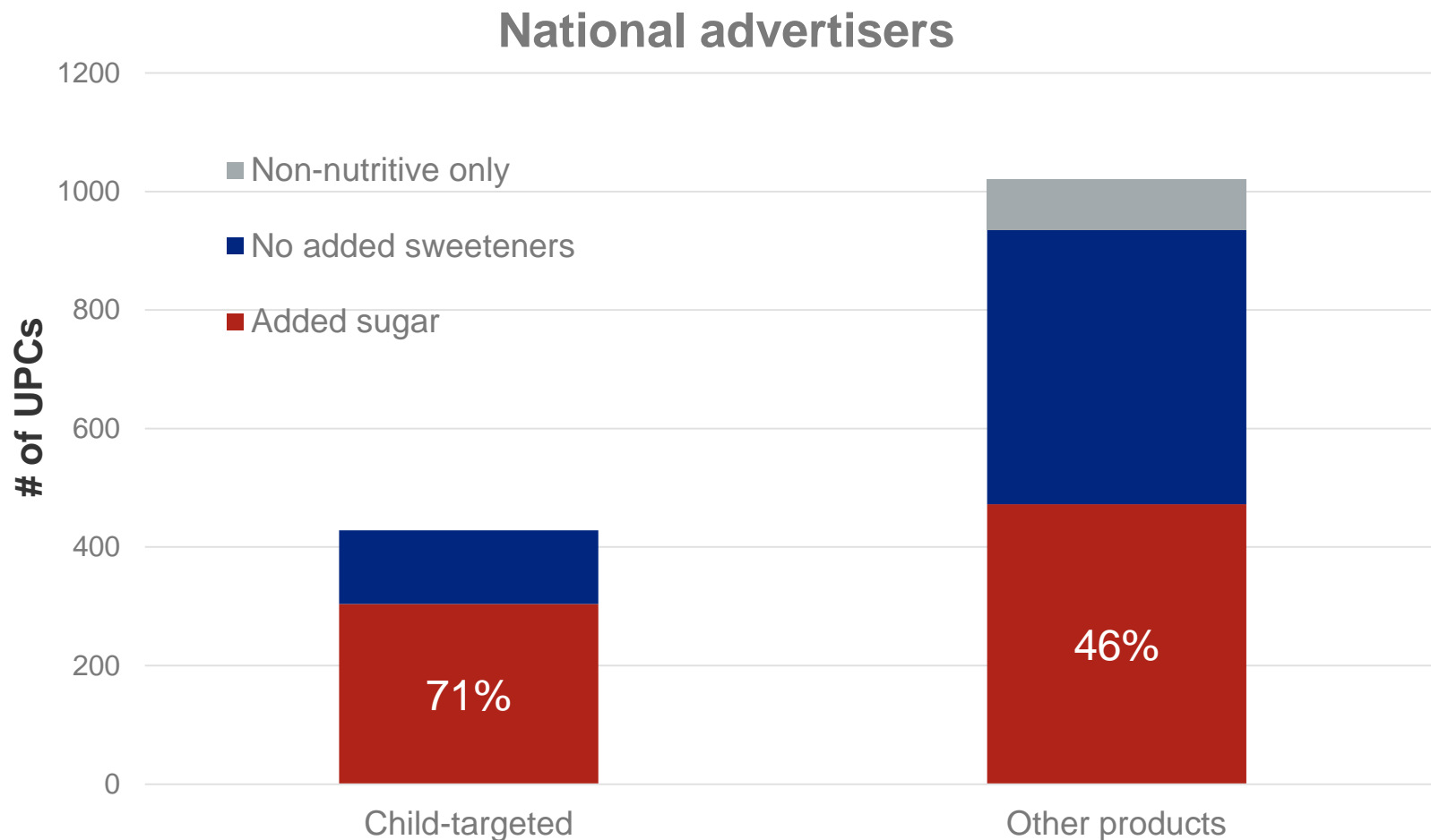
Promotions by company and cereal type



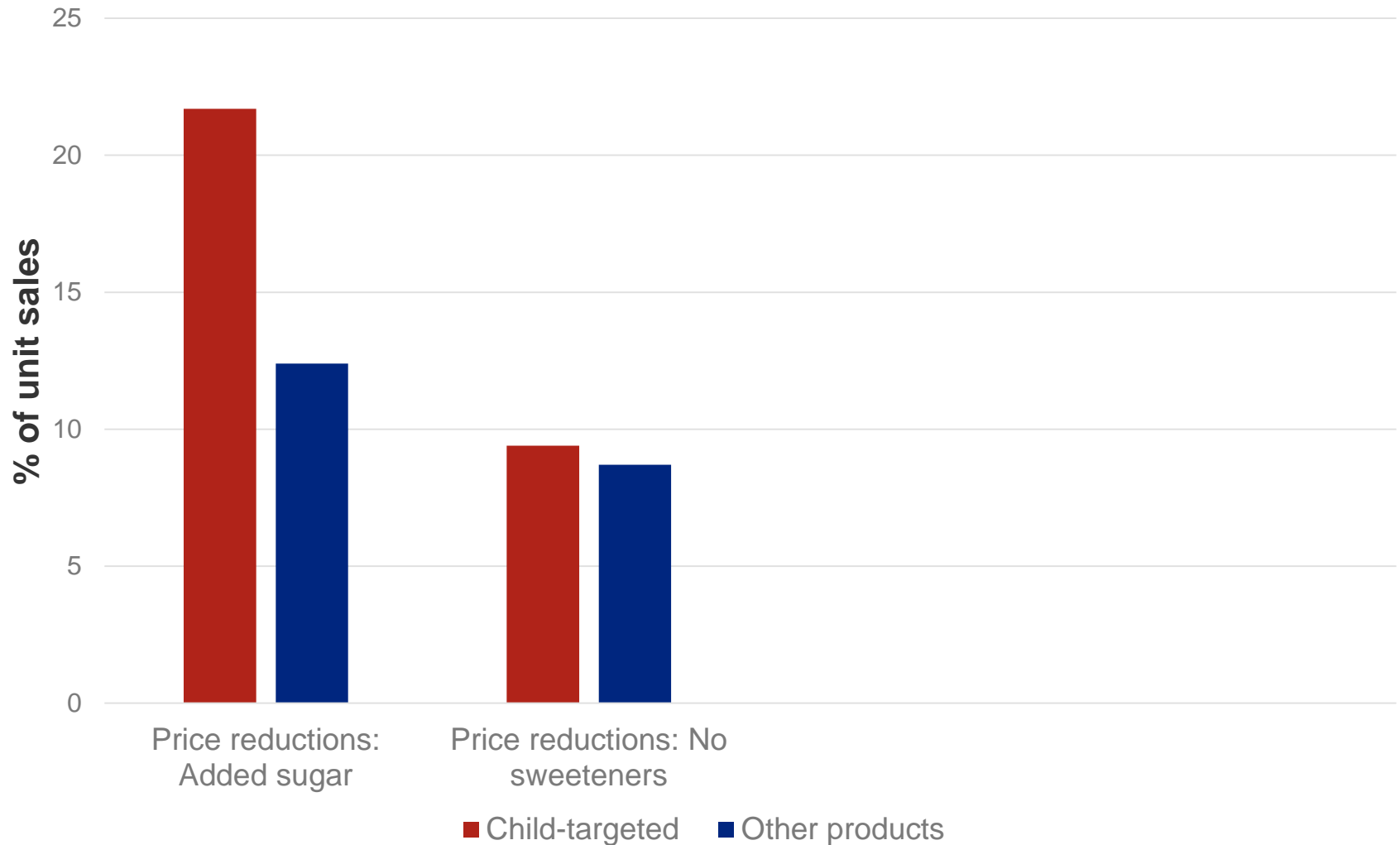
Fruit drinks and juices

- Syndicated sales data (Symphony IRI)
- Promotions: Displays, temporary price reductions, features
- Single-serve bottled and aseptic juices
 - Target audience: Child vs. other
 - Manufacturer: National advertiser vs. other
 - Nutrition: Added sugar, non-nutritive sweeteners only, no sweeteners

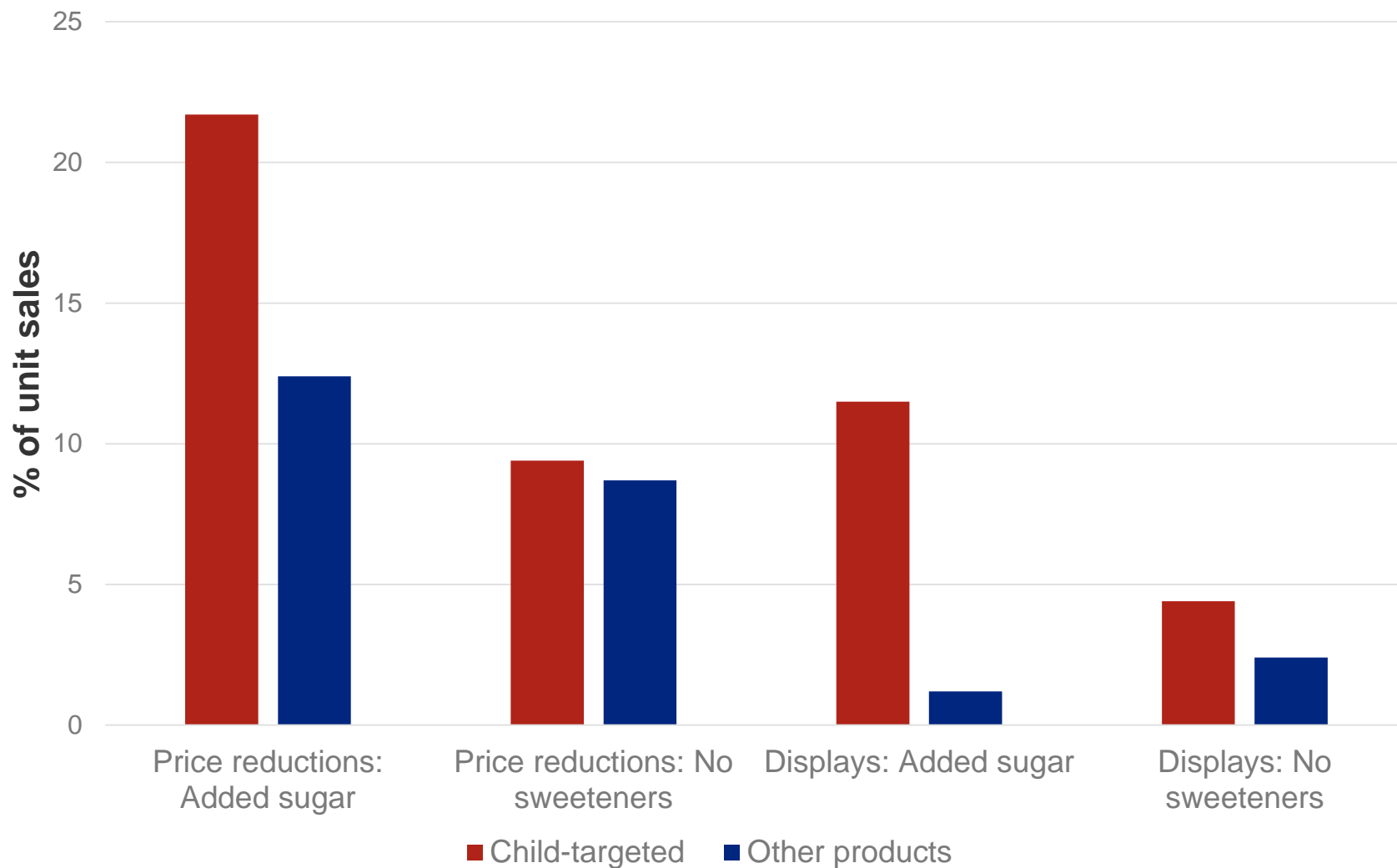
Product characteristics



Incremental sales: Promotions



Incremental sales: Promotions



Shelf placement - Lunchables

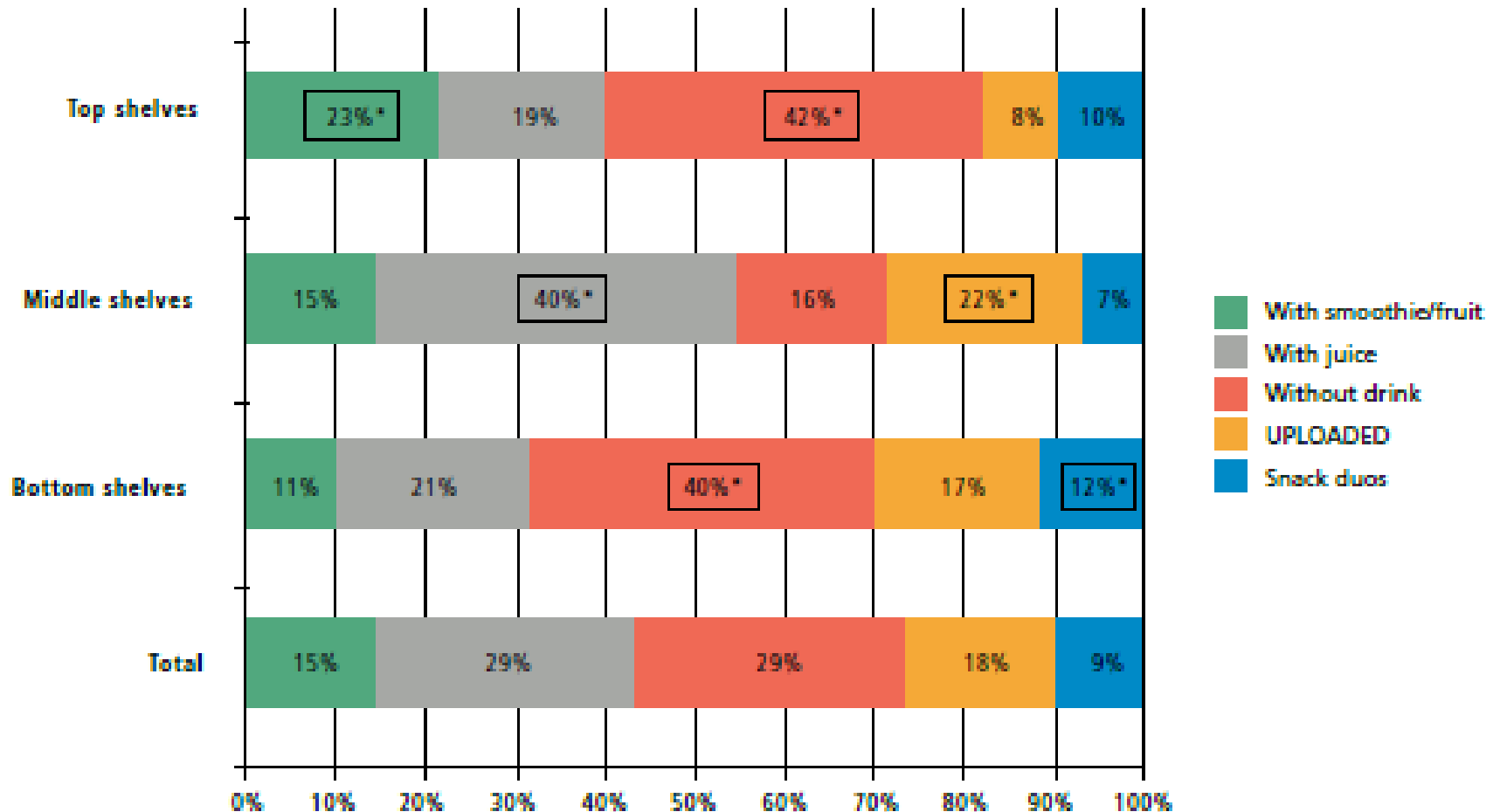
- Hired online workers
 - Gigwalk
 - Field Agent
- Lower cost
- Detailed specifications
- Researchers coded images

Rudd Center Lunchables (2014)

Typical Lunchables aisle



Distribution by shelf



*Shelf where the category appeared most often

Source: Audit of 50 supermarkets (June 2013)

Product packaging and claims

- Supermarket audits – research personnel
- Detailed coding sheets or photos of packages

Children's sugary drinks

- Average 4.3 nutrition claims per package



Baby food claims



- Structure function claims: 100% of pkgs
- 5.9 nutrition messages and 3.1 child development messages per package

Considerations

- Budget
- Research staff
- Outcome measures
- Level of control/verifiability
- Amount of variation across retailers and over time

Thank you!

Questions?

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