



Times & Trends

Baby Boomers:

Riding the Wave of Diversity

SEPTEMBER 2012

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Symphony **IRI** Group

Insight.
Innovation.
Impact.

“Golden Year” Shoppers Often Belie Stereotypes

The two generations studied in this report, the silent generation and baby boomers, are remarkable in different ways. The silent generation, those born between 1925 and 1945, fought in three wars: World War II, the Korean War and the Vietnam War. Their parents suffered through the Great Depression, when for many, simply putting food on the table each day was a victory. These experiences shaped the silent generation. Frugality and a focus on home life were deeply etched into their consciousness.

Baby boomers, both the older ones (born 1946-1955), and the younger ones (born 1956-1964), grew up with distinctly different influences. America was prosperous, materialism was king and many Americans enjoyed unparalleled success. The frugality evidenced among boomers' parents was being rapidly replaced by a, “how big a car can I buy?” approach to living. While this mentality can be seen across Younger and older boomers alike, younger boomers spend more freely than older boomers. Additionally, as a whole, boomers represent an enormous bulge in the U.S. population that manufacturers and retailers have worked tirelessly to understand and satisfy.



One quality the silent generation and baby boomers have in common is the profound impact their shopping patterns have on today's CPG, retail and healthcare industries. Silent generation members are living longer than any previous generation, and they are shopping much later in life than their parents. To maximize their longevity, members of this group are “power shoppers” when it comes to healthcare and health-related products. Boomers share a similar affinity for products that help them live life to the fullest. And, simply based on their sheer numbers and spending power, they continue to have an enormous impact on CPG and retail.

However, boomers are still susceptible to economic shocks. In 2010, for example, spending by younger boomers fell 2.3 percent and spending by older boomers was down 2.7 percent, notably more than the 1.5 percent decline seen at the market level. Spending patterns in 2011 and 2012 continue to reflect differences across these consumer segments.

Relying on traditional thinking about any shopper group is a dangerous practice. With boomers, given their diversity and spending power, it can be very detrimental to a brand or channel's chances for success. But, by developing marketing strategies that are aligned with shopper needs, retailers and manufacturers create shopping experiences that will win shopper spending and ongoing loyalty.

I will look forward to your feedback and insights on these important shopper groups.

A handwritten signature in black ink, appearing to read "John A. McIndoe", with a long horizontal flourish extending to the right.

John A. McIndoe
Senior Vice President, Marketing
SymphonyIRI Group

Executive Summary: Turning Insights Into Action

INSIGHT

- The baby boomer generation is huge, wealthy, and well-known for its individuality and diversity
- While grocery and club spending is fairly consistent across baby boomer and senior segments, other channels demonstrate significant shifts in relevance across cohorts
- Spending on healthcare products increases with age, influenced heavily by increasing concern with a wide range of chronic conditions and the wide-spread prevalence of a proactive and self-reliant approach to healthy living
- The anti-aging skin care market slowed when the economy turned sour, but it has gained traction and is expected to see strong growth during the next several years
- At a macro level, boomers spend similarly on private label goods versus the average shopper, yet drug and dollar are winning disproportionate share of private label spending among these consumers

ACTION

- Invest to understand the needs and wants of key consumers/shoppers at the market/store level, and then deliver personal and customized messages through highly-targeted, direct-to-shopper marketing and in-store experience programs
- Drive sales, loyalty and margin with a strategic approach to everyday pricing that carefully aligns with the appetite of key shoppers as well as corporate goals
- Understand core healthcare needs of your most important shoppers; align product assortment, store layout and marketing programs with chronic and/or frequently occurring ailments
- Constantly evaluate emerging technologies, processes and ingredients for opportunities to raise the bar on performance through new product innovation
- Retailers should continue to build their private label programs, customizing at the market/store level, where possible, to maximize relevance; manufacturers should continue to innovate to differentiate from private label, wrapping in new attributes and unique and targeted benefits, where possible

Introduction

The baby boomer generation is perhaps the most studied generation in the history of market research—and this is rightfully so. At more than 80 million strong, this group is huge and there is little doubt that their spending power is quite substantial.

The consumer packaged goods (CPG) industry has been serving baby boomers for several decades now. CPG marketers have helped boomers start their own households and raise their families. Now, CPG marketers are working to guide boomers through their golden years.

Alone, this is a complex task. After all, boomers are known for their individuality. Add to this a complex economic environment that is still struggling to find stable ground more than three years after The Great Recession, significant levels of unemployment and underemployment, a shaky (at best) stock market that has pummeled many retirement plans, and offspring that are moving back in with their parents in such great numbers that they

have been dubbed “the boomerang generation,” and the task can seem, at times, insurmountable.

The good news for CPG marketers: the rewards of “getting it right” are sweet. Baby boomers are big spenders, and they invest heavily in CPG products. They are just entering the golden years, so their impacts on the CPG, retail and healthcare industries will be felt for years to come.

But, getting it right means truly addressing the most pressing needs of millions of shoppers spread across two decades—different life stages, household circumstances, and states of financial and physical health and well being.

It may be challenging to serve such a huge and diverse market segment, but it is certainly not impossible. Rapidly-evolving science and technology is allowing marketers to get to know consumers at a

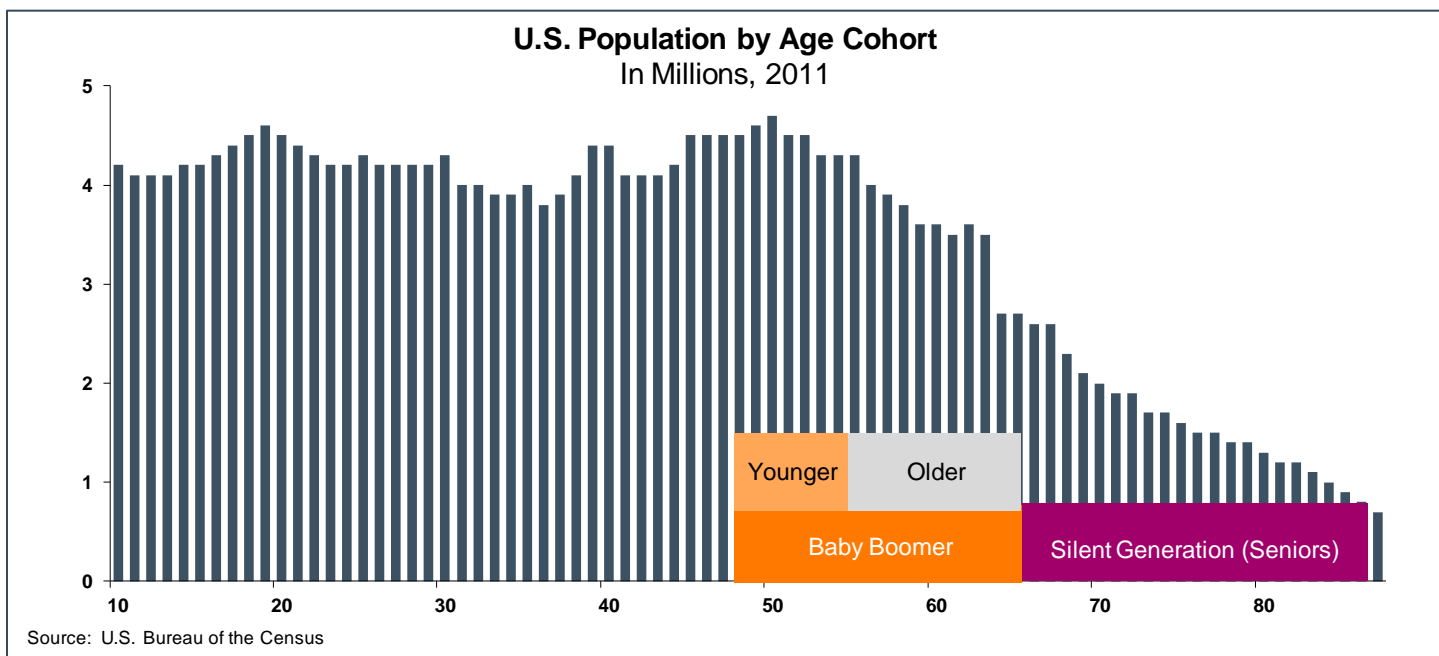
very microscopic level. They can identify key shoppers and high-potential consumers by studying habits, purchase response and history across CPG channels. And, they can create highly targeted and customized responses to consumer needs vis-à-vis new product introductions and marketing programs.

This report provides insight into current and emerging trends within the baby boomer marketplace that will enable manufacturers and retailers to develop and execute strategies that align with overall corporate goals while simultaneously addressing the rapidly changing needs of the country’s largest and most influential consumer group ever.

Cohort Definitions

<u>Name</u>	<u>Year of Birth</u>
Younger Boomers	1956-1964
Older Boomers	1946-1955
Seniors	1925-1945

Market Opportunity: Population



The baby boomer generation is nearly 80 million strong, and is reputed for their favorable financial outlook and a strong desire for the good things in life.

At nearly 130 million strong, consumers in their golden years represent a sizeable opportunity for CPG marketers.

The reality is, though, that successfully serving consumers in their golden years requires a highly targeted and consumer-centric focus, given the large size and diversity of this market. A one-size-fits-all strategy would simply be ineffective.

The most sizable segment of this market is the baby boomer generation. Born between 1946 and 1964, this generation is nearly 80 million strong, and may go down in history as one of the most influential generations of all times. In general, boomers are optimistic about their finances, and they are a bit more free-spending than the generation that preceded them. Despite commonalities

within the boomer generation, younger boomers and older boomers think and act differently from each other in important ways, as well. These differences will be explored throughout this report.

That generation preceding boomers is comprised of those consumers born between 1925 and 1945. These consumers are members of the silent generation, or traditionalists—a generation that grew up during The Great Depression. Throughout this report, these consumers are referred to as seniors. Seniors witnessed their parents struggle to make ends meet, and the difficulties of simply keeping the family fed. It is logical, then, that these consumers demonstrate particularly frugal purchase behaviors.

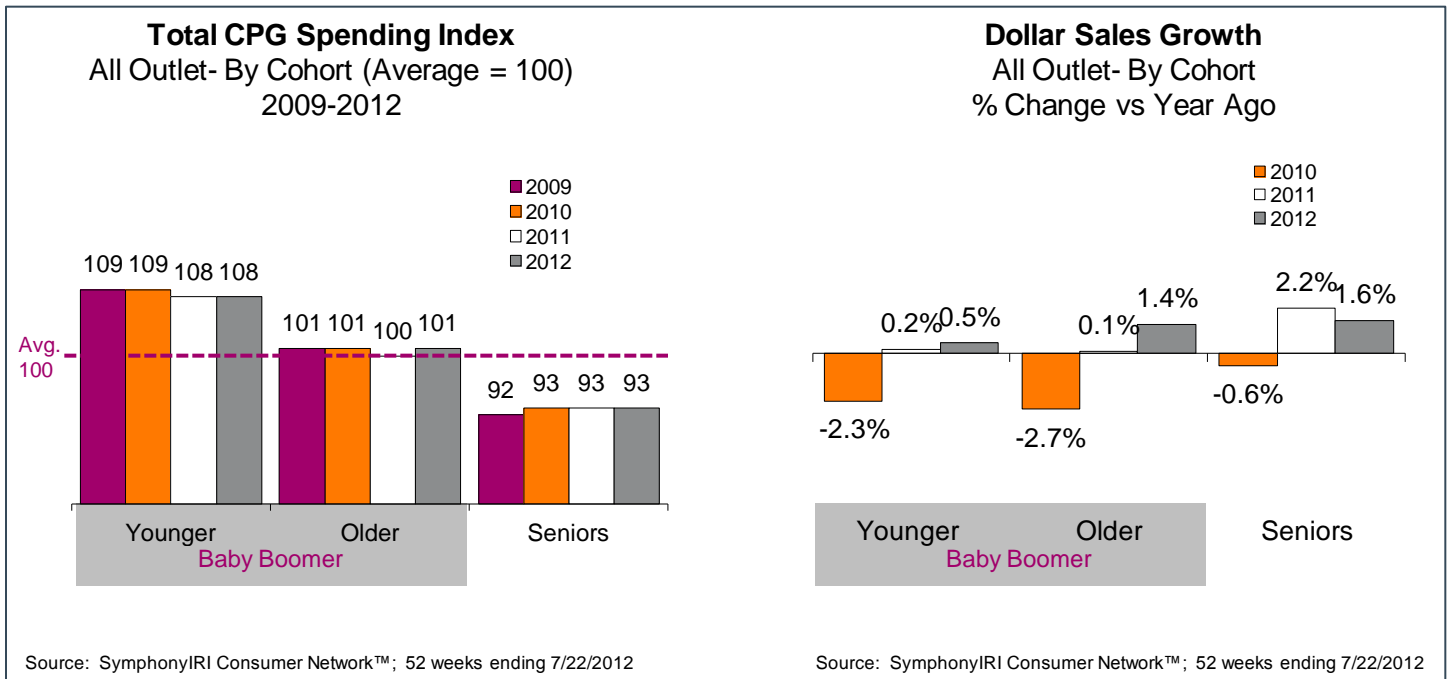
A commonality between the silent generation and baby boomers is their

quest to live their golden years to the fullest—in good health and with vibrant energy.

Throughout their lives, and particularly during the downturn of the past several years, consumers in both of these cohorts are turning to the CPG industry to achieve this important goal.

Today, and into the future, the needs and wants of these consumer segments will be many, varied and changing. To continue to serve these markets well, CPG marketers must stay well tuned into those needs and wants. They must anticipate and/or quickly react to changes so that they can continue to hone their products and go-to-market strategies accordingly.

Market Opportunity: Size & Growth



Spending fell across mature consumer segments during 2010, but younger boomers have consistently outspent their older counterparts and seniors during the past several years.

Trends around CPG spending habits evidence the individuality that marks the baby boomer generation. These patterns also reflect a slow change from the conservative lifestyle led by their silent generation predecessors to the more free-spending ways that are frequently associated with baby boomers. Ultimately, these trends underscore the importance of understanding and serving baby boomers at an individualized level that shows full appreciation for their diversity.

Boomers of all ages clearly spend more than the generation that came before them. But, younger boomers, in particular, are heavy spenders on CPG products. They spend, on average, nearly 10% more than

the older consumers within their cohort and more than 25% more than those in the silent generation.

Despite their generally optimistic outlook on all things financial, boomers made noteworthy cuts to their CPG spending in 2010. Cuts by younger boomers were only slightly less than those made by older boomers, at 2.3% and 2.7%, respectively. In contrast, the average shopper reduced CPG spending 1.5% during the same time period.

While spending by the average shopper climbed just under 1% in 2011, spending by boomers inched up by a fraction of that amount. In 2012, spending continued

to inch upward, but the pace of growth is mixed.

On par with trends evidenced across consumers as a whole, one-quarter to one-third of boomers are having difficulty affording groceries today. As such, it is logical that these consumers, like others, are holding fast to their conservative purchase behaviors even as the economy slowly improves. Evidenced throughout this report, though, shoppers in their golden years demonstrate a variety of approaches to CPG shopping, in general, and to saving money on CPG products.

Shopper Patterns: Channel Share

Channel Share Indices
Based on Share of Dollar Sales, 2012

	Younger Boomers	Older Boomers	Seniors
Grocery	100	98	97
Drug	87	98	111
Supercenter	80	61	49
Club	106	105	104
Dollar	113	115	120
Walmart	99	99	98

Source: SymphonyIRI Consumer Network™; 52 weeks ending 7/22/2012

While the grocery channel holds similar share of spending across older consumer segments, drug and dollar channels demonstrate increasing relevance as consumers age.

As the CPG channel shopped by nearly 100% of U.S. consumers, it is not surprising that the grocery channel holds a very similar share of spending across boomer cohorts. But, among some other channels, share of spending changes rather notably across consumer segments.

Drug and dollar are each examples of such channels. And, interestingly, despite the fact that the drug channel and the dollar store channel share many similar features, including geographic proximity, store size and category assortment, dollar stores hold a higher share of spending across both younger and older boomer cohorts versus their drug channel competitors.

While drug channel share of spending among senior shoppers is above average, it is quite low among younger boomers.

Analysis of average share of spending at the category level reveals that drug retailers hold particularly low share across several sizable categories, including soap, toothpaste, vitamins and internal analgesics within the younger boomer cohort. In contrast, dollar channel share of spending among younger boomers is above average across each of these categories.

These are noteworthy gaps, as these categories hail from beauty/personal care and healthcare departments, and these are departments for which drug is generally viewed as a destination channel.

Detailed in the August 2012 edition of Times & Trends, dollar channel efforts to build penetration and share remain strong. Hence, the possibility of competition

between the two channels increasing in coming years is quite real.

The club channel also stands out when examining share of spending across the baby boomer generation. While not particularly high, it is noteworthy that club stores win above-average spending across a segment that is in or entering “empty nest” years.

Still, among younger boomers, club holds a higher than average share of spending across 90 of the 100 largest club channel categories tracked, including energy drinks, cat food and eye/contact lens care. Among older boomers, share of spending is above average in 58 of the top 100 club channel categories, including adult incontinence, wine and sugar substitutes.

Shopper Patterns: Channel Shifts

Total Channel Share Point Change versus Year Ago

Dollar Sales
2012

	Younger Boomers	Older Boomers	Seniors
Grocery	(0.6)	(0.5)	+0.0
Drug	(0.1)	(0.2)	(0.3)
Supercenter	0.0	+0.1	0.0
Club	+0.5	+0.4	+0.6
Dollar	+0.1	+0.2	+0.2
Walmart	+0.1	+0.4	(0.2)

Source: SymphonyIRI Consumer Network™; 52 weeks ending 7/22/2012

Club and dollar channels are showing traction among baby boomers, while grocery and drug channels have each lost share among this shopper segment during the past year.

Grocery share of CPG sales is 48% and 47% among younger boomers and older boomers, respectively. But, during the past year, share has slid across both of these cohorts. Detailed in the August 2012 edition of Times & Trends, this slide is consistent with overall CPG trends, and a result of the fact that grocers are facing increased competition for share of spending from across CPG channels.

Also consistent with overall CPG industry trends are the share gains being posted by club stores. During the past year, the club channel gained 0.3 share points among shoppers as a whole. Across Younger and older boomers, share gains were slightly higher, at 0.5 and 0.6 share points, respectively.

Club retailers are clearly performing well across this sizable consumer segment. Health-related programs are a factor in this success.

For instance, Costco has been looking to raise the profile of its pharmacy services for several years now. Programs aimed at doing so include the Costco Member Prescription Program, which serves members without prescription insurance, or with insurance that doesn't cover all of their prescription medications, and a generics program which provides members a 90-day supply of generics for \$10.

Additionally, the retailer offers a chain-wide health screening service, which tests for a range of chronic conditions, including diabetes and cardiovascular disease¹.

Dollar store retailers are also gaining traction across baby boomers. While not as sharp as increases witnessed by club stores, dollar store share of sales among younger and older boomers inched up during the past year, once again, in alignment with trends witnessed in overall CPG.

Shopping Patterns: Department Share

Department Dollar Share
All Outlet, 2012

	Total Panel	Younger Boomers	Older Boomers	Seniors
Beauty/Personal Care	8.1%	7.1%	6.5%	6.5%
Center Store	56.5%	58.6%	58.7%	57.5%
Fresh/Perishable	16.2%	15.8%	15.4%	15.5%
Frozen	10.3%	10.3%	9.5%	9.4%
General Merchandise	3.2%	3.1%	3.4%	3.5%
Healthcare	5.6%	5.1%	6.5%	7.7%

Source: SymphonyIRI Consumer Network™; 52 weeks ending 7/22/2012

Spending on healthcare products increases slightly with age, while beauty/personal care spending declines.

Department-level spending by boomers is quite similar to that of the population as a whole. However, points of divergence can guide CPG marketer efforts to more intimately understand this large and diverse consumer segment and reveal opportunities to deliver against their nuanced needs and wants.

For instance, the average consumer spends 56.5% of her CPG dollars on center store categories. Among boomers, spending is slightly higher, at just under 59%. Above-average spending in several large center store categories, including carbonated beverages, dog food, and chocolate candy, contribute to this trend.

In a majority of CPG departments, spending mix changes slightly as

consumers age. Center store, fresh/perishable and frozen food spending as a percent of total CPG dollars slip slightly, while general merchandise spending inches upward. Spending in beauty/personal care and healthcare also change and, in these departments, the shifts are more sizable.

For instance, while the population as a whole spends 5.6% of their CPG dollars on healthcare, spending by younger boomers is a bit lower, at 5.1%. But, older boomers allocate 6.5% of their CPG dollars to healthcare. This shift is attributable to the fact that spending by older boomers is above-average in 70% of healthcare categories. In some categories, such as home health kits and anti-smoking products, spending by older boomers is

considerably higher versus the average shopper, indexing at 161 and 152, respectively.

In beauty/personal care, the opposite holds true—beauty/personal care as a percent of total CPG spending declines. In fact, average spending in sanitary napkins/tampons, shampoo and deodorant—three of the 10 largest beauty/personal care categories—is 56%, 34% and 31% lower among older boomers, respectively, versus their younger counterparts.

Category Opportunity: Healthcare

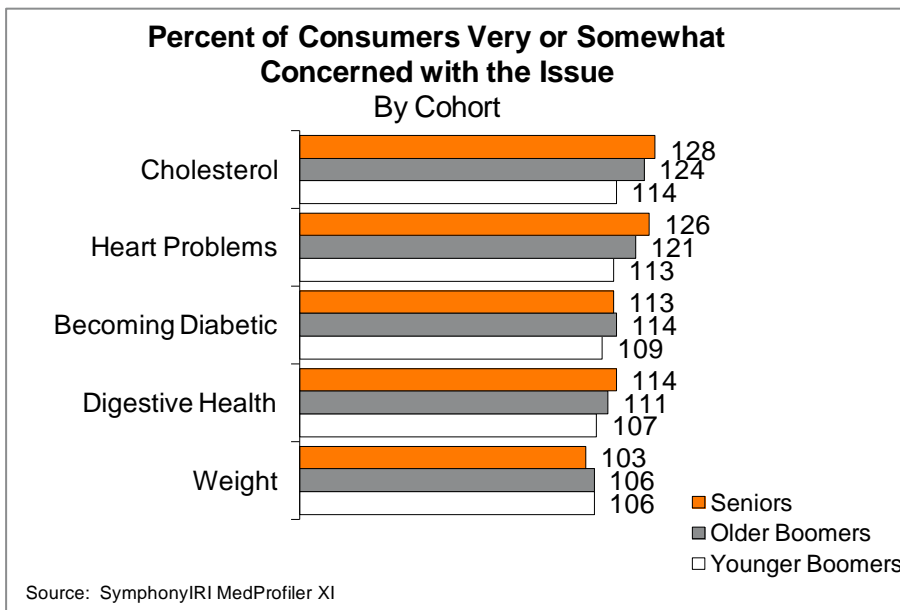
Above-average healthcare spending by boomers translates to significant opportunity for marketers of healthcare products and products that impact health and wellness. SymphonyIRI's MedProfiler reveals that boomer concerns around healthcare cut across several prevalent health conditions.

For instance, 62% of Americans consider themselves to be overweight. Among younger and older boomers, this number is slightly higher, at 70% and 71%, respectively. Based on these data, it is not surprising to see that about three-quarters of Americans, including baby boomers, are concerned with their weight.

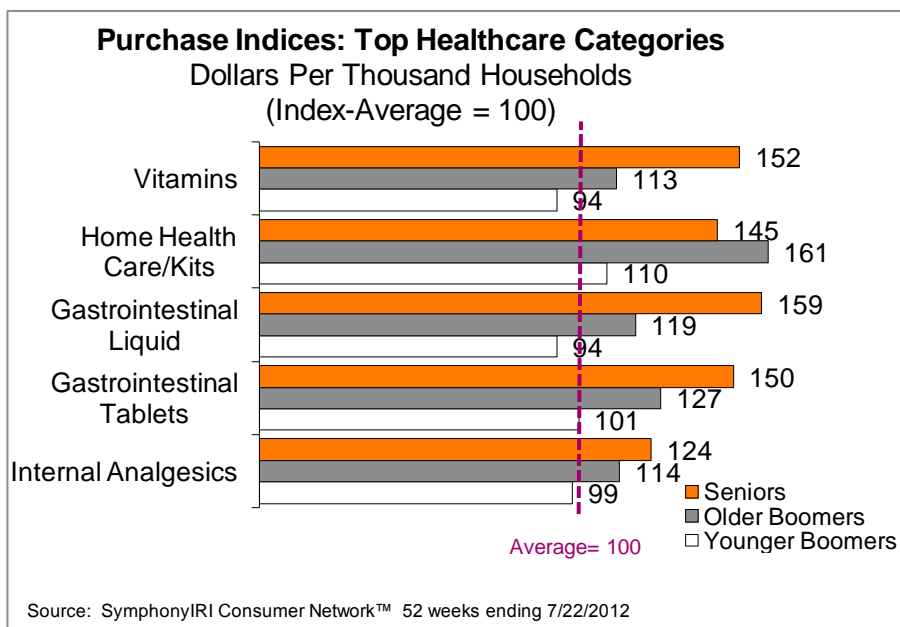
Other health-related issues are also top of mind for boomers. Many of these tend to become more prevalent with age. Of course, concern with these conditions also rises with age. For example, boomers show above-average concern with cholesterol and cardiac health. Seniors show even more concern with these conditions than boomers.

Certainly, consumers today are taking a proactive and self-driven approach toward warding off and/or addressing some of these concerns. While the propensity to take a self-driven approach to healthcare declines with age, SymphonyIRI's MarketPulse survey reveals that even among consumers aged 65 and up, more than one in four are self-treating for simple ailments. As such, in many of the categories that address or alleviate these health conditions, spending increases sharply with age.

According to SymphonyIRI's 2012 Consumer Snacking Study, 66% of consumers want retailers to make it easier to find healthier-for-you products



As consumers age, they become increasingly concerned with a range of common health issues.



Spending across top healthcare categories increases with age.

in the store. This applies to food and beverages, but retailers are taking it a step further, and making it easier to locate condition-based solutions with well. For instance, Walgreens has created "store within a store" layouts, where products

for conditions, such as diabetes management and heart health, are grouped together and labeled with shelf tags to help consumers easily locate them.

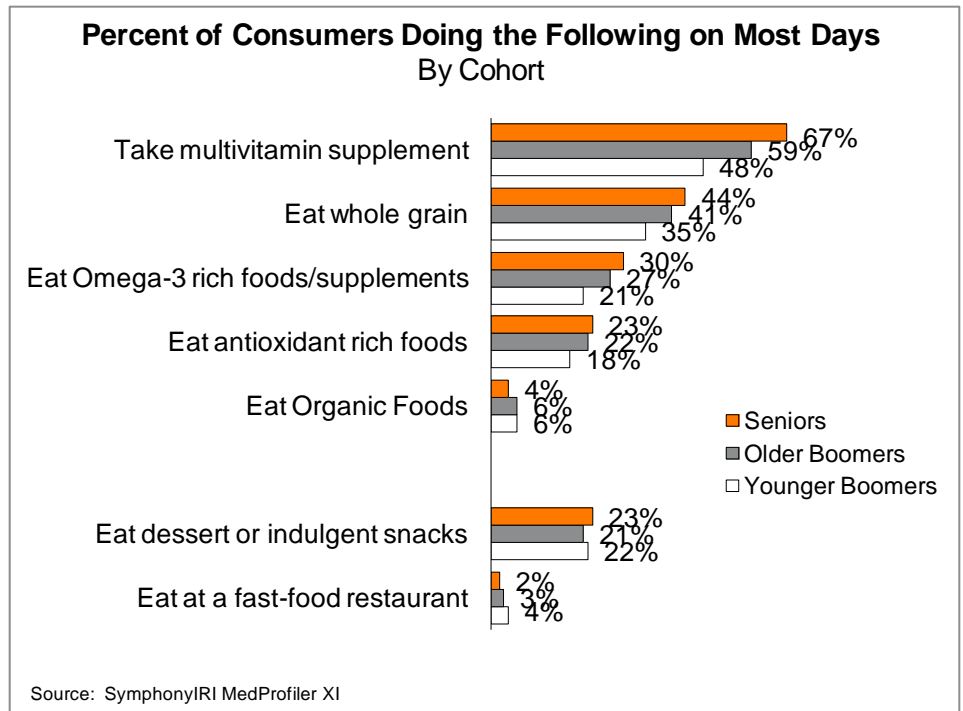
Category Opportunity: Food & Beverage

Like many consumers, boomers are using healthy eating as a key strategy in their goal to live longer and healthier lives. In fact, 87% of consumers over the age of 65 are trying to eat healthier these days¹.

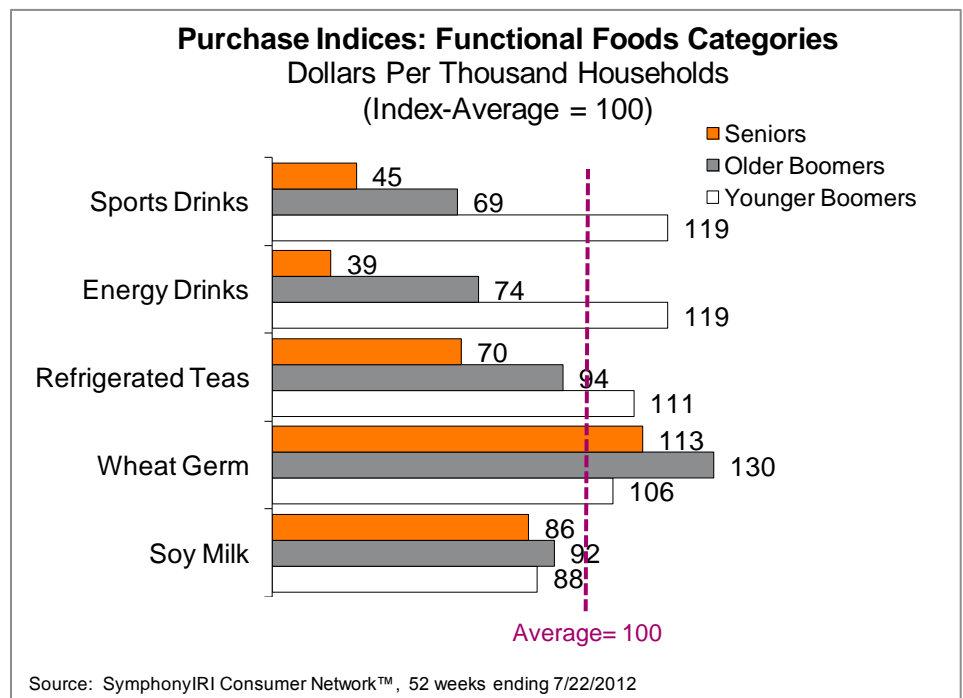
When it comes to specific food-related behaviors, adoption tends to increase with age. For instance, 35% of younger boomers eat whole grains on most days—essentially the same versus the average consumer. In comparison, 44% of seniors are eating whole grains daily. And, 21% of younger boomers consume omega-3 foods or supplements on a daily basis—only slightly more versus the average consumer. But, propensity increases rather sharply with age, and, at 30% of the population, seniors are significantly more likely make omega-3s part of daily life.

Interestingly, when it comes to a variety of foods that are generally accepted as offering “functional benefits,” such as refrigerated teas, sports drinks and energy drinks, spending in these areas tends to drop as age increases.

This speaks to significant opportunity for CPG marketers around education vis-à-vis benefits of consuming these products which, in turn, becomes opportunity to increase the size of the pool of potential consumers of these products.



Adoption of food-related wellness behaviors tends to increase with age...



...yet, across several key foods that are generally accepted as supporting a healthy lifestyle, spending tends to decline with age.

Category Opportunity: Skin Care

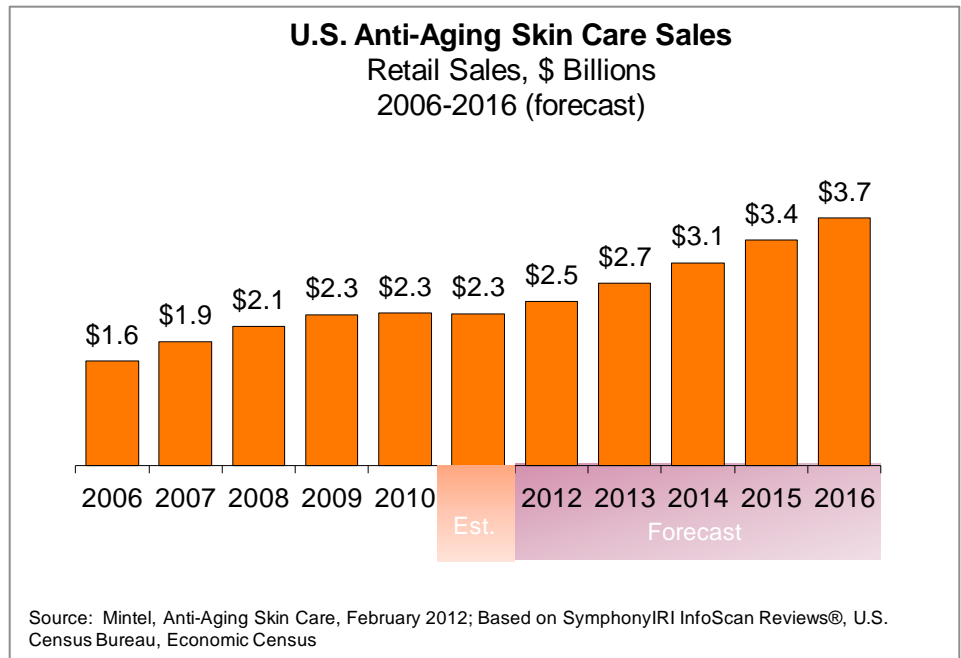
Though the anti-aging skin care market slowed when the economy faltered, it is expected to gain steam during the next several years and achieve \$3.7 billion dollars in U.S. retail sales by 2016.

According to Mintel's recent report entitled, "Anti-Aging Skin Care," women aged 55 and over are currently a huge driver of sales in this market segment, and they will continue to be a key driver of growth during the next several years.

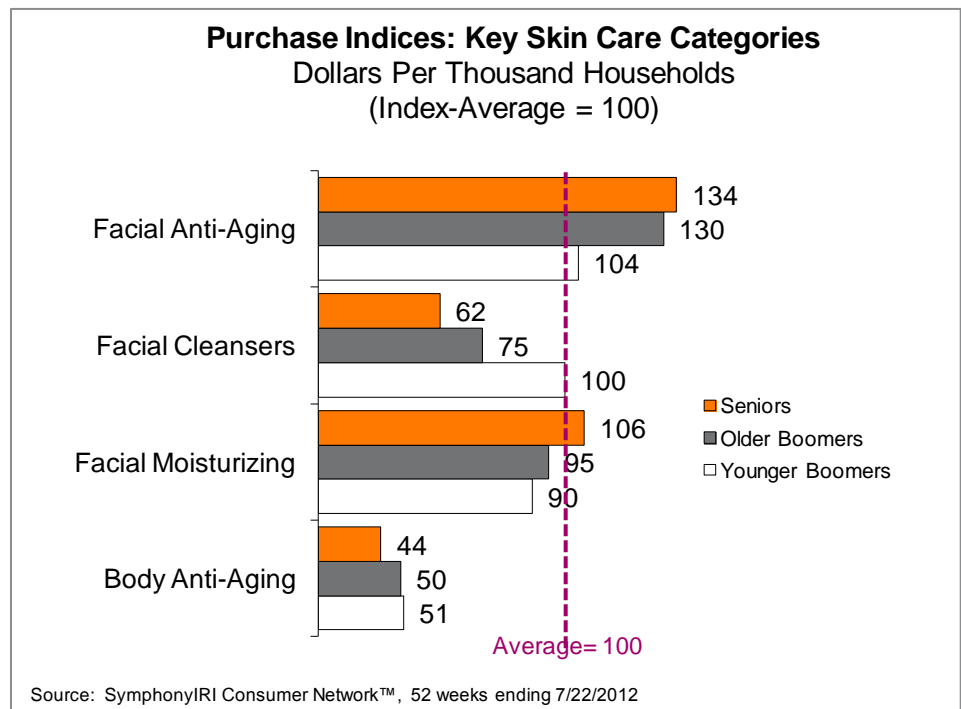
Analysis of skin care sales trends underscores the strength of anti-aging facial products among baby boomer and senior cohorts. In particular, spending on facial anti-aging products jumps significantly between younger and older boomer segments.

Given the strength of the facial anti-aging category among boomers and seniors, the relative weakness of the body anti-aging category is noteworthy. This category has struggled during the past couple of years, as consumers have been forced by economic conditions to make choices around where to spend their skin care dollars.

As the economy slowly gains momentum and new ingredients and products come to market, skin care marketers have significant opportunity to convert facial anti-aging category buyers to the body anti-aging market with messages around value and effectiveness.



After hitting a plateau during the depths of the recession, anti-aging skin care sales have resumed a strong growth path.



Spending on skin care categories is quite mixed, with facial anti-aging products demonstrating a sizable spending jump between younger and older boomers, and body anti-aging showing plenty of upside potential.

Purchase Behavior: Private Label

Private Label Share Indices
Based on Share of Dollar Sales- by Channel
(Index-Average = 100)

	Younger Boomers	Older Boomers	Seniors
All Outlet	99	98	103
Grocery	99	98	103
Drug	107	120	134
Supercenter	99	95	96
Dollar	105	98	111
Club	96	102	107
Walmart	98	100	102

Source: SymphonyIRI Consumer Network™; 52 weeks ending 7/22/2012

Boomers spend similarly on private label goods versus the average shopper, but spending differences are evidenced across CPG channels, with drug and dollar winning disproportionate share of private label spending among these consumers.

Throughout the course of the economic downturn, SymphonyIRI has reported on the important role private label products have played in helping consumers to save money on everyday CPG essentials. This trend holds true among the baby boomer population where, on average, private label spending is quite similar to that of the average shopper.

But, according to SymphonyIRI's MarketPulse survey, boomers have been somewhat less inclined versus the average shopper to step up spending on private label as a result of economic pressures.

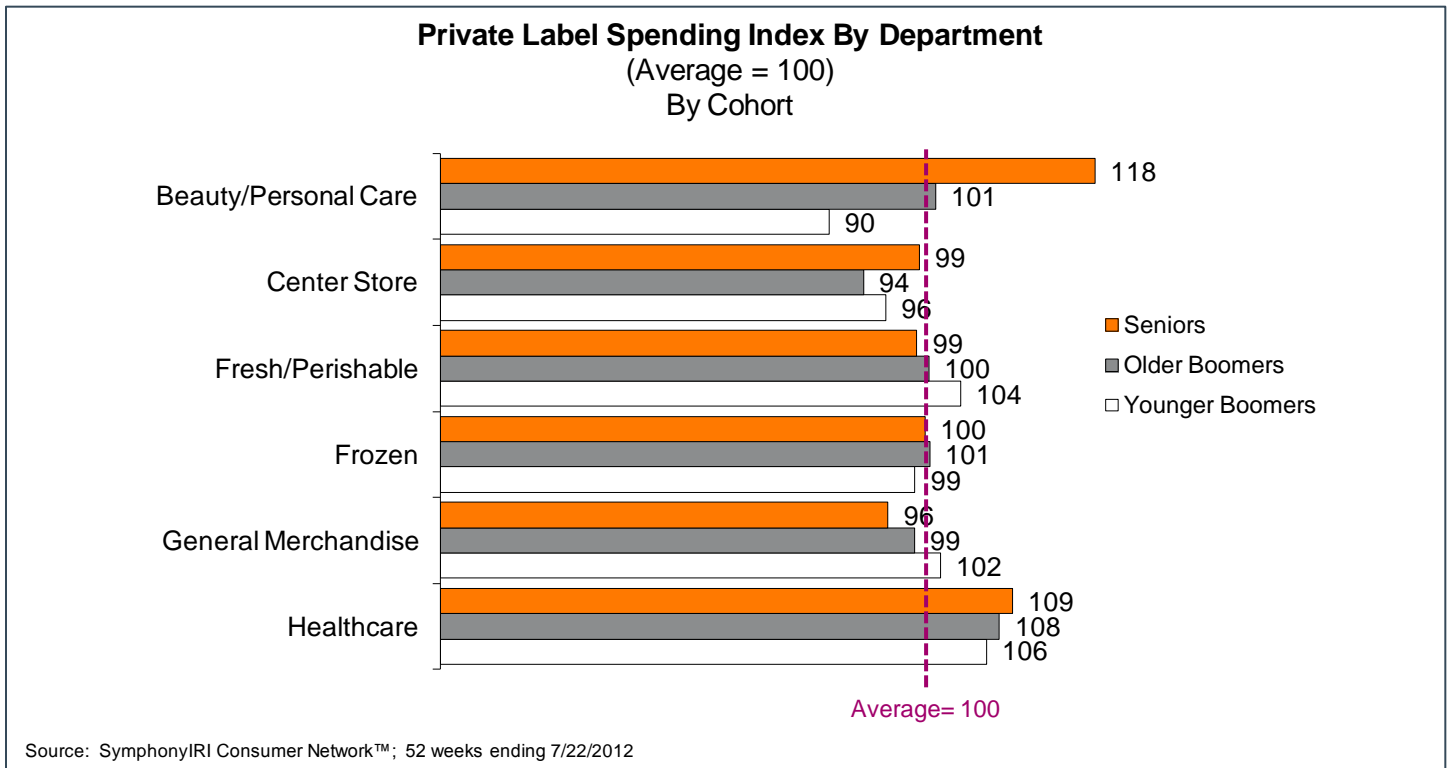
Slightly more than 40% of consumers over the age of 45 are buying more private label today than they were before the downturn began. This compares to 47% of the general market stepping up private label spending during the same timeframe.

Private label share of spending varies at the channel level and across age cohorts. Among younger boomers, for instance, drug and dollar stores win slightly higher-than-average share of private label spending. Meanwhile, among older boomers, the drug channel stands out as holding a disproportionately high share of private label spending.

Across most CPG channels, private label share of spending increases with age. This trend is particularly strong within the drug channel. Gains in this area are likely attributable to strong private label performance in the healthcare and beauty care departments—both are a core competency for drug retailers.

Department-level private label trends are examined more closely on the following page of this report.

Purchase Behavior: Private Label



Across several CPG departments, boomers' spending on private label closely mirrors that of the average shopper; in beauty/personal care and healthcare, private label captures a higher share of spending across older boomers and seniors.

Across some CPG departments, boomer spending on private label looks very much like that of the average shopper. However, nuanced differences underscore the opportunity to be had in developing highly targeted private label products and marketing programs.

For instance, in the healthcare aisle, spending on private label is above-average across the three studied older consumer cohorts. This is not a surprise, for, detailed earlier in this report, spending on healthcare products generally increases with age.

Additionally, these consumers are making plans to finance college educations for their children and/or for retirement.

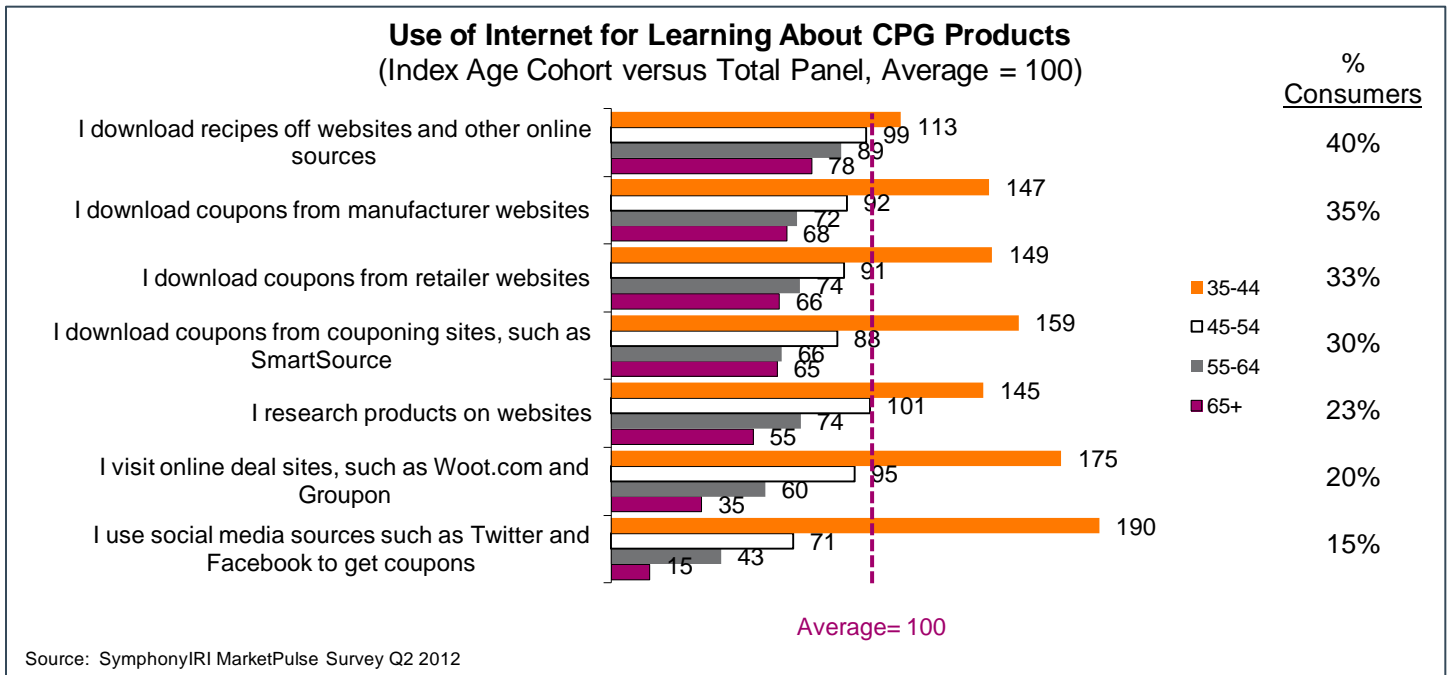
Detailed in SymphonyIRI's September 2011 edition of Times & Trends, "Private Label: Brand Positioning in the New World Order," private label healthcare products are priced an average 44% lower versus their national brand counterparts.

This savings, combined with the increased financial considerations that come into play at this life stage, make it logical for boomers and seniors to target the department in their efforts to save money.

In beauty and personal care, a similar dynamic exists. Private label beauty and personal care products are priced an average 64% less versus their national brand counterparts. While spending in beauty care declines with age, it still represents a sizable share of boomers' and seniors' CPG budgets. And, with shoppers turning to home-based beauty treatments in an effort to save money during tough financial times, these lower-priced alternatives to nationally branded products are being well-received.



Trends to Watch



Use of the Internet for learning about and shopping for CPG products is much lower among older shoppers, but rapid escalation is expected.

While younger shoppers are much heavier users of the Internet for learning about and shopping for CPG products versus their golden year counterparts, the latter group is, indeed, turning to the Internet in their search for product information and money-saving opportunities.

For example, one-in-three senior shoppers searches the Internet for recipes, and about one-quarter look to manufacturer and retailer websites for coupon opportunities. These numbers may be lower versus the average shopper, but they are still represent an opportunity to engage this sizable consumer segment.

Generally speaking, the propensity to engage in online activities grows quickly as

consumer segments get younger. Boomers and seniors are adapting to today's technological advances, but they are well behind younger shoppers when it comes to the newest social media platforms.

Of course, new media will only gain momentum and acceptance. As such, it is logical that CPG marketers are continuing efforts to connect traditional and new media in their marketing efforts. For instance, Kimberly-Clark recently executed an extensive product launch program for Depend Real Fit for Men and Depend Silhouette for Women, seeking to destigmatize the product and simplify the purchase process.

As part of the program, an FSI directed consumers to a website that provides product information and contains celebrity endorsement of the products with a tie-in to charitable donations. The site also invites consumers to share their opinions of the products. Additionally, a walgreens.com initiative, which includes banner ads on the site and paid search advertising, has produced very strong e-commerce results, according to a senior manager of Kimberly-Clark's shopper marketing center of excellence¹.

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¹ Source: Path to Purchase Institute Website, April 25, 2012

Conclusions: CPG Manufacturers

To effectively serve the baby boomer market, CPG manufacturers should consider the following action items:

- Shopper Marketing
 - Establish profiles of existing “best customers” across boomer cohorts by creating discrete behavioral segments based upon their habits, purchase response and history with competitors
 - Invest to understand core health and wellness needs across “best customer” segments, and ensure that product lines and marketing programs are targeted tightly against those needs
 - Partner with key retailers in the development of loyalty program offers targeted against the needs/wants of key shopper segments

- Product Marketing
 - Communicate with core shoppers early and through complementary old and new media programs and highly targeted messaging
 - Partner with retailers to build their product offerings based upon what priority customers are buying frequently

- In-Store Marketing
 - Work collaboratively with retailers to develop pricing strategies based upon the needs, wants and appetite of your common best shopper, and continually measure and adjust to maximize best shopper response
 - Highlight the features of technology across media platforms and within the store, such as healthcare management programs, product delivery, etc.

Conclusions: CPG Retailers

To effectively serve the baby boomer market, CPG retailers should consider the following action items:

- **Shopper Marketing**
 - Establish profiles of existing “best customers” across boomer cohorts by creating discrete behavioral segments based upon their habits, purchase response and history with competitors
 - Invest to understand core health and wellness needs across “best customer” segments, and ensure that product assortment and marketing programs are highly targeted against those needs
 - Partner with key manufacturers in the development of loyalty program offers targeted against the needs/wants of key shopper segments
 - Examine convenience strategies that make it easier for older shoppers, as well as all time-crunched CPG shoppers, to grab essential products quickly

- **Product Marketing**
 - Communicate with core shoppers early and through complementary old and new media programs and highly targeted messaging
 - Develop and manage core product offerings based upon what your priority customers are buying frequently

- **In-Store Marketing**
 - Develop pricing strategies based upon the needs, wants and appetite of your best shopper, and continually measure and adjust to maximize best shopper response
 - Encourage cross-purchase behavior with planograms and merchandising displays featuring a full complement of products with high cross-purchase indices within the market or store
 - Highlight the features of technology in-store, such as prescription renewals and healthcare management programs

Resources

To gain insight into opportunities that exist to leverage unique and actionable content about consumers and shoppers, and analytical solutions and platforms that drive more effective and efficient shopper marketing, contact your SymphonyIRI client service representative regarding custom analyses leveraging the following resources:

SymphonyIRI Consumer Network™

This consumer panel provides a clear picture of consumer behavior so that sales and marketing professionals can continually adjust strategies to focus on the consumer dynamics that drive brand and category performance.

SymphonyIRI MedProfiler XI

SymphonyIRI MedProfiler Survey is an annually fielded questionnaire that helps retailers and manufacturers who require more effective health and wellness related marketing campaigns to identify brand growth opportunities. MedProfiler Health and Wellness Survey covers a wide variety of individual issues including health opinions, health concerns, medical conditions, diet types, allergies and lifestyles.

SymphonyIRI DigitaLink™

DigitaLink is a latent class segmentation based on the types of digital devices that consumers use to connect to the Internet, their online activities, technological comfort level, attitudes about digital media usage, and actual shopping behavior.

SymphonyIRI EconoLink™

EconoLink is a latent class segmentation based on actual shopping behavior and consumer attitudes—especially about the impact of economic conditions—that helps manufacturers and retailers understand and respond to the new demands of shoppers across the economic continuum.

FOR MORE INFORMATION

Please contact Susan Viamari at Susan.Viamari@SymphonyIRI.com with questions or comments about this report.

About SymphonyIRI Group

SymphonyIRI Group, formerly named Information Resources, Inc. ("IRI"), is the global leader in innovative solutions and services for driving revenue and profit growth in CPG, retail and healthcare companies. SymphonyIRI offers two families of solutions: Core IRI solutions for market measurement and Symphony Advantage solutions for enabling new growth opportunities in marketing, sales, shopper marketing and category management. SymphonyIRI solutions uniquely combine content, analytics and technology to deliver maximum impact. SymphonyIRI helps companies create, plan and execute forward-looking, shopper-centric strategies across every level of the organization. For more information, visit www.SymphonyIRI.com.

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The logo for SymphonyIRI Group features a red curved line above the text. "Symphony" is in a grey serif font, "IRI" is in a red serif font, and "Group" is in a grey sans-serif font.

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