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Recap

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The Harris Poll examined the disconnect between where consumers are in terms of what they are feeling, how that translates to perceptions of brands, and how all of that sits in the broader cultural, political and societal context.

A keynote presentation from The Harris Poll highlighted the first day of sessions. Michele Salomon, VP, and Gabriel Rozenwasser, research director, gave an in-depth presentation that explored emerging trends that are redefining consumer behavior in today's rapidly evolving marketplace.

"One of my favorite subjects is data, consumers; what people think, feel, do," Salomon told the audience Wednesday at the Renaissance Schaumburg Convention Center Hotel in Schaumburg, Illinois. "We want to zoom out. Help you understand the broader world your consumers live in."

The theme of the presentation was the disconnect between where consumers are in terms of what they are feeling (in regard to price, value, quality and overall customer experiences), how that translates to perceptions of brands, and how all of that sits in the broader cultural, political and societal context, Salomon said.

The key points of their presentation included:

The Economy

It's all about the economy night now. Financial woes are present. According to data from The Harris Poll, 76% of consumers agree with the statement, "Economists may say things are getting better, but we're not feeling it where we live."

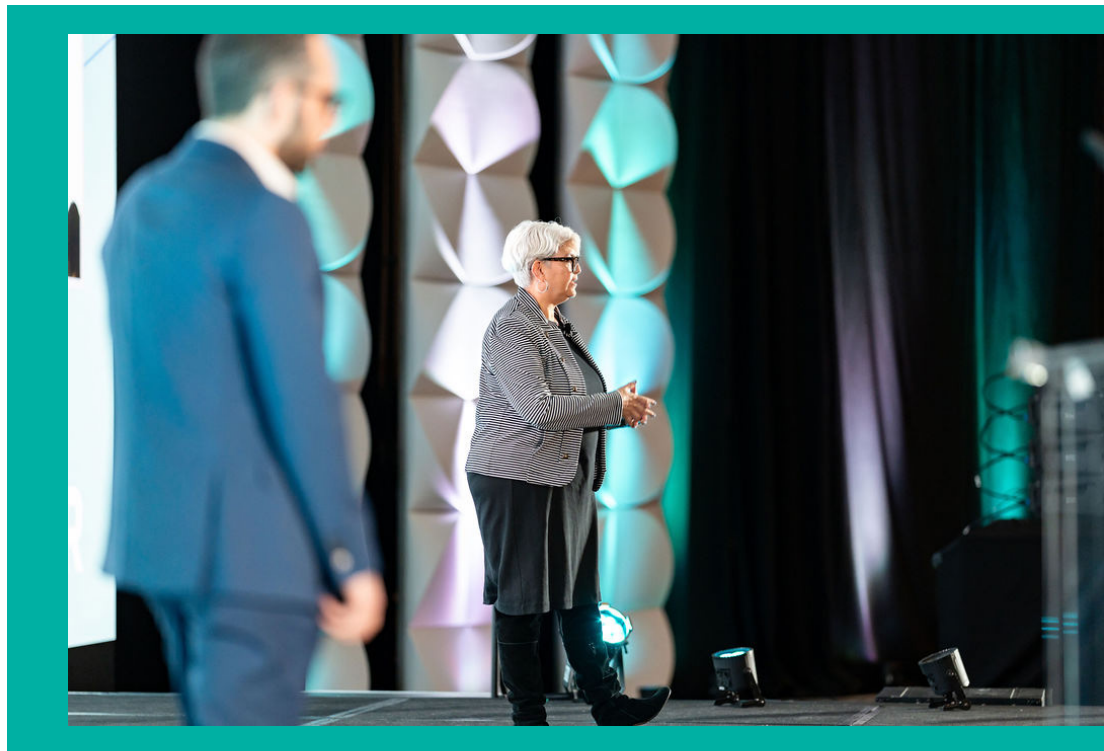
Perceptions are not aligned with reality. Prices are up. Emotional stress layers on the economics stress. We've hit peak political stress — 62% say U.S. politics is a significant source of stress in their lives. The line between the consumer brain and the political brain is blurred. Politics creates brand dissonance. The majority agree too many subjects have become political.

Reputational Impact

Opinions about American companies are on the decline. Reputation is linked to political neutrality. Partisan brands have the worst reputation. Grocery, retail and CPG reputations decline after continued inflation. Inflation is the leading cause of the decline in opinions of companies, Rozenwasser said. Prices are up, quality is down. That's a damaging duo. Additionally, consumers will cancel business over inflation.

SPEAKERS

Michele Salomon, Vice President, and Gabriel Rozenwasser, Research Director, The Harris Poll



Consumer Experience

In-store is not dead. It outweighs online for inventory and discovery. Consumers are searching for better experiences. Hands-on equals happiness. If you build it (a vibe), they will come. Younger consumers turn to social commerce for buying and selling. New technology (save self-checkout) is underutilized across the board. Effort is rewarded with improved shopping experience, regardless of the measure.

Make AI matter — 78% say what matters to them most is a product's or service's overall quality and experience, not if it uses AI; 72% say AI has become the latest marketing ploy by companies; 70% say companies overestimate their interest in AI-infused products and services.

"If at first you don't succeed with technologies, try, try again," Salomon said.

After Rozenwasser took a deeper dive into grocery shopping, the speakers made it clear that consumers "just want to have fun" or "want a sweet treat." "Consumers are finding ways to make more out of less," Salomon said.

The speakers closed by pointing out that consumers make 35,000 decisions per day, and then rhetorically asked what attendees could do to make their brands stand out.

Their four takeaways were:

- **Consumer context is critical.** Be mindful of the macro events that are shaping the environment your consumers are making decisions in.
- **Realign the consumer-brand contract.** What matters now is what has always mattered — price, experience, quality and value.
- **Meet consumers where they are.** Technology isn't one size fits all, but it can be leveraged to improve consumers' shopping experience that meets them where they are.
- **Take retail to the next level.** Make your shopping experience a sweet treat to crave by creating the immersive experience consumers want.



How to Get Started With Creative Commerce

By Dan Eisenberg, Blue Chip

Enter Creative Commerce, a new approach that calls us to apply fresh creative constructs to measurable commerce programs — effectively unifying brand development and conversion.

At P2PI LIVE, we heard about ways to bridge the gaps in our fragmented marketing landscape to give consumers more consistent, more personalized brand experiences. The pressure is building for those experiences to deliver both brand engagement and sales. Enter Creative Commerce, a new approach that calls us to apply fresh creative constructs to measurable commerce programs — effectively unifying brand development and conversion — so consumers notice, talk about and buy our brands.

For most brands, the urgent question is how to begin the reorientation. Expanding our perspective on commerce to include both persuasion and purchase clears the way for Creative Commerce to become the new approach.

Re-educate executive leadership and marketing teams. Creative Commerce requires a marketing mentality that goes beyond sales. Discounting and retargeting, while good for traffic and sales spikes, won't deliver on valuable awareness and loyalty. Instead, we should strike a balance between commerce tactics and creative brand building. Brand and agency teams, including executives, can reset by analyzing how commerce takes shape on a longer, wider spectrum.

Restructure briefings. Business goals need to be articulated in briefs. Activations must include earlier, easier opportunities for consumers to shop once they're engaged, such as shoppable media and QR codes. Then teams can accept new parameters and roles. For example, creative teams need to elicit engagement and transaction online — including calls to action in brand ads — while retail specialists need to envision communications beyond displays in aisles.

Develop a paid, owned and earned strategy.

A widening range of channels propels persuasion and purchase. Whereas shopper marketing has leaned heavily into retail media, Creative Commerce can engage paid, owned and earned media. Consider all the pathways, from TV to TikTok; how, when and where people intersect with our brand messages; and what exposures generate both pipeline and purchase.

Set new measurement frameworks. Whereas shopper marketing could be measured on sales within promotional windows, Creative Commerce takes a more intricate, interdependent measurement system. It starts upstream with creative impact — how we're gaining attention and engagement from targeted consumers and how that's leading to cultural and social connections. Then factor in consumer sentiment and brand health to determine the value of media. Balance these with short- and long-term retail ROI calculations like sales lift, customer acquisition costs and customer lifetime value.

Play all for one. Creative Commerce is a team sport. You can't win with brand ideas or performance tactics alone. Beyond knowing what's happening across the field, key players need to build off aligned objectives and each other's efforts.

How you start in Creative Commerce dictates how you finish. By laying the right foundation, you set up your marketing to make a more profound, lasting impact and return continually higher sales and consumer loyalty.

About the Author: Dan Eisenberg is CMO at Blue Chip, an independent commerce marketing agency and active P2PI member. Blue Chip clients include Bob's Red Mill, Bosch Power Tools, Gallo Winery and Procter & Gamble. Learn more at www.bluechipww.com.



SPEAKERS

Michael Halverson, Principal Product Manager, Albertsons Media Collective; Lindsey Susick, Director, Client Development, Walgreens Advertising Group; Terra Ingalls, VP of Sales, Koddi; and Mark Williamson, AVP, Costco Wholesale

Retail media is full of untapped potential, and roadblocks: Opaque demand, rigid retailer roadmaps, limited insights and increasing operational complexity can make every step forward feel laden with costly trade-offs.

Halverson, Susick, Ingalls and Williamson discussed how retailers can break through these challenges through unifying retail media network technology, which unlocks innovation, drives stronger brand outcomes and enhances the shopping experience through seamless omnichannel.

“In-store” – where 90% of sales occur – “is the moment of truth for an omnichannel campaign,” Halverson said.

Walgreens Advertising Group focuses on measuring real-time results, understanding the customer, and delivering personalized messaging through in-store, promos, custom activations and more. “This helps build a story for the brand and optimize and supercharge other campaigns,” Susick said.

Costco is entering the retail media game, where it’ll be able to tap into the shopping habits of its nearly 75 million members. “We

have a lot of rich broad data,” Williamson said. “Costco is growth-oriented. With sales and membership, growth is the KPI for us.” Retail media helps the decision-making process, showing the correlations and where it makes sense to invest. “Retail media can be a bridge,” he added.

“At this point it’s table stakes,” Halverson said. “We need to do more and do better. Brands need more” and retail media networks can “help brands make more informed decisions. Merchants hold the power with the sales. We make decisions on behalf of the brand, with goals of mutual growth between retailer and brand. That’s our North Star.”



Every relationship needs nurturing, and the one between agencies and clients is no different. Agencies can apply these love-language equivalents to their working relationships with clients:

1) Quality Time

- Establish common goals. Align on a shared language and best-in-class work.
- Provide juicy problems. Identify business challenges or cultural opportunities and encourage open dialogue.
- Foster ongoing communication. Prior to the COVID-19 pandemic, Arc Worldwide recalls having to give numerous presentations via speakerphone. The current norm of video calls allows teams to properly gauge their clients' reactions.

SPEAKERS

Dana Stotts, EVP, Business Leadership, and Matt Denten, EVP, Creative Director, Arc Worldwide; and Tara Dawson, Senior Director, Channel & Shopper Marketing, Pernod Ricard USA

2) Acts of Service

- Provide unreasonable hospitality. Address client needs and seek out proactive opportunities.
- Build your crew. Advocate for the work internally and push for buy-in from stakeholders.

3) Words of Affirmation

- Foster inspiration through appreciation. A sincere and simple "thank you" goes a long way.
- Understand your clients' day. Show empathy for clients' challenges and strive to be the best meeting of their day.

4) Human Touch

- Seek deeper connections. Create opportunities for meaningful interactions.
- Make time to bond. Allow time for in-person connections outside of scheduled meetings.

5) Tangible Gifts

- Produce effective work. Deliver business-building results all parties can celebrate.
- Deliver effective feedback. Be clear, consolidated and constructive.
- Win industry awards. Achieve recognition for outstanding partnership and business results.



Connected commerce is the seamless integration of consumer experiences, with:

- Increasing retailer complexity and expectations.
- Intensifying competition for share and visibility, from small and large competitors.
- Fracturing the consumer journey and an expanded definition of the digital shelf.

Nestle Purina's LAB9 was previously a retail innovation center — a sales support tool to bring brands to life. It evolved into a consumer-centric space.



SPEAKERS

Stephen Wurth, Director, Shopper Innovation & Experience, James Kristof, VP, Sales/e-Commerce, and Tracey Johnson (Director, Marketing/e-Commerce), Nestle Purina Petcare Co.; and Jody Wasbro (SVP, Strategy & Experience Design), WD Partners

Its value proposition is not the space, it's the way they are able to work with people in the space.

“LAB” stands for learn, activate, build.

There's a simplicity in disengaging from the PowerPoint.

They are seeing repeat visits. Customers keep coming back. They've come up with some “pretty amazing” partnerships through it.

Collaboration example: They created an endcap in partnership with a regional grocer that turned into a community wall. They took away the merchandising aspects. Shoppers engaged with it, writing notes to their furry friends. It drove traffic to the department.

The presenters also shared digital examples/results from LAB9 engagement.

Through its LAB9 retail innovation center, Nestle Purina has been able to prioritize the consumer's voice and experiences, embrace a mindset of constant improvement and evolution, and foster partnerships that drive mutual value.

Takeaways:

- Human-centered design.
- Continuous adaptation.
- Collaboration and co-creation.

Laugh, Learn and Lead: Building Value in a World Where Brand Loyalty Is Dying

DAY 1

SPEAKERS

Chris Cubba, Chief Revenue Officer, and Brendon Lemon, Director, Business Development, Snipp Interactive

In this session, Cubba said the single most important thing a brand can do in 2025 is to “figure out how to bring value to their consumer but also put money back in their pocket.” This is so crucial particularly in today’s economy when consumers have less purchasing power, U.S. credit card debt has surpassed \$1 trillion (up 25% from April 2020), inflation and food prices have hit record highs and consumers have burned through savings.

As a result, consumer buying behaviors have dramatically changed. Seventy-nine percent of consumers are adopting cost savings behaviors, and 33% are monitoring their

expenses closely and tapping into savings. Affordability is the top motivator for consumers, but not the only, Lemon said. Health, the planet, experience and society are also top categories that motivate consumers.

Perhaps most notably, brand loyalty will decline in 2025, but use of loyalty programs will increase, Cubba said, citing a recent Forrester report. That means consumers will care less about your brand and more about the value it offers, and consumers will download more loyalty programs, including your competitors, to find that value.



DAY 1

Uncovering Hidden Gems: The Value of Secondary Distribution Channels



Secondary distribution channels can offer significant opportunities for growth in today’s retail landscape.

O’Neill and Strickler shared insights from successful programs in the natural channel, particularly for Nestle’s Vital Proteins collagen powder.

“If you go into an actual channel like Whole Foods, Shopkick is a way for us to advertise through lookbooks, kicks, walk-in (and) scan in-aisle,” O’Neill said. “It’s a great way for us to engage our consumer.”

“In health and wellness ... it’s not like conventional mass channel,” Strickler added. To promote Vital Proteins, Shopkick and Nestle partnered to reach a particular kind of consumer. Health shoppers are super engaged and like to read up on ingredients and how-tos (such

as adding the powder to coffee) and do research. Going in-store for kicks, scans and purchases help drive sales and basket sizes – sometimes as much as 10-20%.

“If you have a brand that needs more education,” she added, “it’s a great way to give consumers some knowledge.”

Kick rewards drive engagement along the path to purchase:

- At home: Raising awareness and purchase intent.
- In-store: Directing shoppers to retailers carrying a brand’s products.
- Rewards and conversion: Getting shopper insights and rewards for purchase.
- Loyalty: Driving repeat purchases through rewards.

In 2024 (so far) there have been 11 campaigns, Strickler added, across multiple brands in the natural channel, resulting in positive ROAS, hundreds of thousands of products in hand, and millions of impressions.

SPEAKERS

Meara O’Neill, Shopper Marketing Manager, Nestle Health Sciences; and Natalie Strickler, Senior Sales Director, Shopkick

Gamification goes beyond traditional play. Gamification is defined as the process of adding games or game-like elements to something (such as a task) so as to encourage participation.

The presenters cited multiple sources showing the benefits of gamification. Interactive content generates 52.6% higher engagement rates than static content, according to Mediafly. Then according to eMarketer, 49% of consumers are interested in gamification in retail and CPG loyalty programs, if there is a chance to win prizes.

When shopping online, 70% of consumers enjoy gaming elements, according to Bazaarvoice. Finally, there is a 22% increase in loyalty and a 15% higher awareness for brands that have already gamified their customer engagement tactics, according to Stamp Loyalty Solutions.

Consider the following tips:

1. It's not a matter of if you should use gamification, but when and how to implement it. This can be in the form of sweepstakes, personalization and challenges.
2. Gamification is active advertising, not passive.
3. Opportunity exists across the entire commerce ecosystem. Examine the P2PI Omnichannel Landscape and determine where and how to plug into its parts.
4. Remember to W.I.N.
 - Wow factor: Incorporate elements that surprise and delight your audience.
 - Interactivity: Ensure the gamification is interactive & encourages participation.
 - Nature: Foster a sense of community and ongoing engagement with your brand.



SPEAKERS

Brad Godwin, SVP of CPG Partnerships, Breaktime Media; and Denzel Washington, Manager, Brand Experience, Commerce - Morning Foods, General Mills



Fragmented marketing efforts are holding CPG brands back, leading to inconsistent consumer experiences and lost opportunities for engagement and revenue.

Pages, Galloway and Mitchell discussed breaking down silos and unifying customer engagement to drive loyalty, boost spend and deliver improved results. An integrated approach builds a more loyal customer base.

The right offer at the right time with the right message is key. A common platform allows for increased engagement and cost savings. Siloed approaches equal inconsistent experiences.

Customers evaluate brand relationships based on more than financial gain. An aspirational loyalty measurement model includes four dimensions of value:

- **Economic:** The perceived value customers get from the brand. Purchase volume and lift and program penetration result in “I get my money’s worth.”
- **Engagement:** Customers take part in activities such as email engagement or membership that connect them to a brand. “I’m actively involved.”
- **Experience:** Repeat engagement and advocacy nurture brand confidence, leading to a contactable base, referrals and testimonials. “They deliver consistently.”
- **Emotional:** The personal relationship and recognition customers receive from the brand fosters connection. “They care and appreciate me.”

Technology and tools should be future proof and scalable, as they play a role in unifying customer value delivery.

Real-world success stories include a c-store CPG turning consolidated promotions, rebates and coupons into a 10 times increase in loyalty engagement. A grocery CPG turned a 360-degree activation leveraging unified channel data into a 12.5% increase in buy rates and repeat engagement from 67% of loyalty members within 60 days.

SPEAKERS

Hector Pages, Chief Client Officer, Chris Galloway, EVP, Loyalty Program Strategy and Design, and Oliver Mitchell, VP Marketing, Brandmovers

How to Use Marketing to Scale a Challenger Brand In a New Category

DAY 1

The discussion focused on marketing strategies for disrupting traditional beverage categories.

The speakers were asked how they differentiate their product, how they balance brand building with performance marketing, the role of the agencies, and future trends.

Highlighting their rapid growth and market positioning, the speakers from poppi and Athletic Brewing emphasized experiential marketing and consumer-centric approaches. "The consumer is what drives us to do anything," Katz said.

"We believe we are the future of soda," poppi's Judd said.

Agencies can provide a broader point of view and help with integrating data, as well as technical expertise in buying.

Athletic Brewing consistently evaluates its agencies. Are they helping our business? What are they costing us? Could we handle that internally?

There's not a shortage of data. There is a shortage of decision-making, Keefer offered.

They discussed the importance of balancing top-of-funnel brand building with bottom-of-funnel performance marketing.

Future trends include social commerce, consumer-first strategies and the need for agile marketing to adapt to evolving consumer behavior and channel proliferation.

Brands need to be paying attention. Brands that think like creators are going to be getting the attention.

Consumers want to transact wherever, whenever. With younger consumers, that's through social.

SPEAKERS

Sammy Frankel Rubin, VP of Integrated Media, Wpromote;
Andy Judd, CMO, poppi;
Andrew Katz, CMO, Athletic Brewing Company; and Bradley Keefer, Chief Revenue Officer, Keen Decision Systems

How to Use Marketing to Scale a Challenger Brand in a New Category

52% Net Profit Increase



15% Less Spend



Forecast, optimize, and analyze your marketing mix.

ATHLETIC
BREWING CO.

poppi

WPROMOTE



Perry started the session with a question: “Are we doing incrementality as well as we could?”

In retail, the journey starts online but increasingly it ends online. By 2026, it's forecast to account for 39% of global retail sales. By 2027, 70% of sales will be digital or digitally influenced.

That leads us to ask: Who are those 30% who aren't digital? They're still digitally influenced, Perry said. They just might not know it.

“When they go in store, that assortment is there because of digital influences.

“We're pursuing growth – that's the ‘what’ we want.”

Start with current shoppers: “It's cheaper to keep them and maximize them.”

SPEAKER

Chris Perry, chief learning officer, Firstmover



We want to build baskets. Communicate the value. Add a why.

“A lot of brands won't do the trade-up, fearing they'll lose the base shopper. But every SKU has its own DNA and incrementality.”

Show off the variants. Don't assume the consumer knows.

Highlight a good-better-best option. Consider relevant pairings or compelling category offers. Shoppable recipes, for example, aren't limited to food. Consider a back-to-school bundle, a baby care kit or a movie night pack.

Build a case for it. Pair a brand with an occasion. You're not excluding. You're talking to your audience.

Nestle Purina released an advent calendar for wet cat food: That's a niche opportunity to get people to try something new.

Seasons, occasions, competitive claims, before/after, reviews, expert or celebrity endorsements, consumer surveys, social media, a new look, sustainable packaging, trial sizes: All can drive sales.

How Kenvue Leverages Its Customer Data to Drive Higher Media ROI and Scale

DAY 1

Witt and Mengisteab explored how CPG brands can leverage first-party data to drive higher media ROI and scale their reach. While brands' first-party data typically lacks depth because of their retail partnerships, Kenvue tackles this challenge by investing heavily in data science. The two speakers said the manufacturer stands out for its innovations, particularly its implementation of Google's value-based bidding for paid search and their implementation of customized bidding for programmatic media.

With such a large portfolio of brands in various markets, Kenvue spends a lot on advertising through traditional and non-traditional media channels, such as TV, print, programmatic and social. It's the job of the data science team to elevate those marketing outcomes by budget allocation, optimizing the campaigns in-flight and developing new capabilities.

According to Mengisteab, his team does this by:

- Investing in data acquisition and data strategy.
- Working closely with the marketers.
- Working with different vendors to collect second-party and third-party data such as demographic, behavioral, sales and purchase. TransUnion's Identity Graph helps Kenvue connect various data sources into a single ID space.
- Developing clean room capabilities within cloud-based data solutions company Snowflake.
- Leveraging Google's value-based bidding that uses an AI algorithm to optimize paid search and target conversions with "high business value."

SPEAKERS

Geoff Witt, Director, Marketing Solutions, TransUnion Marketing Solutions; and Daniel Mengisteab, Senior Data Scientist, Kenvue

"In the case of custom bidding on programmatic, it's more about driving media efficiency," Mengisteab said. "We're interested in really stretching those dollars and trying to get as much bang for the buck."



How do you define omnichannel, and what practices or things have your teams implemented to simplify this workload and accommodate for today's fragmented ecosystem?

"I usually spend a lot of time on omnichannel objectives," Dunbar said. "What's an objective that serves both in store and online sales? How do I go beyond just having matching luggage between what's on my CTV ad to the ad that I might receive in store on the TV wall. Now that consistency, that matching luggage, is great. How do we get those messages to build on each other? How do we link them programmatically? There's a lot of opportunity to build links between all those different channels."

What role, if any, does AI have in this conversation for optimizing spend and campaign effectiveness?

"I think there's some immediate applications that are fun right now ... like creative brainstorming, versioning different creatives for different platforms, and things like that. AI tools are great for that," Triplett said. "Machine learning is great at inputting a lot of data and coming up with optimizations for schedule. ... But, we're not at the point where you can just sort of turn this over to the black box and let it do things for you without human oversight. I think there's a definite value in having human brains watching over things."

Are brands embracing in store? Emerging brands need more of a push in the space, according to Hayden.

"It can be kind of tough because their eyes get really big for sponsored search and those really exciting, immediate results that you're getting back — you're seeing all these awesome KPIs," Hayden said. "So, from an in-store perspective, it's kind of on us a lot to share, 'Hey, this is so important for that full 360, close the loop.' For people who were shopping online who didn't actually make the purchase on their online grocery order, how can we help seal the deal when they're in person."

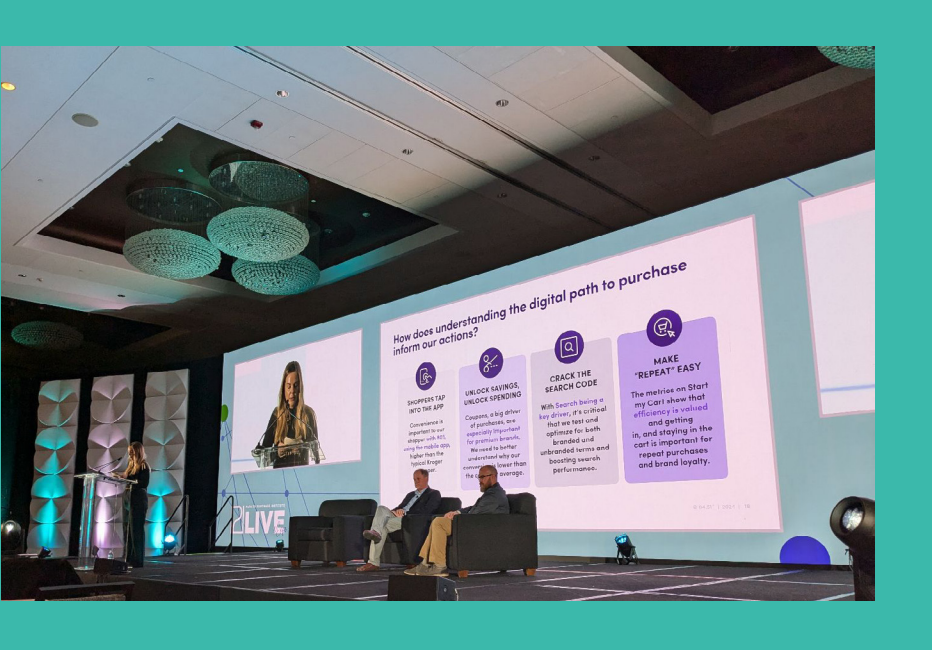
SPEAKERS

Cyndi Loza, Senior Editor, Path to Purchase Institute; Lee Dunbar, SVP, Head of Retail Media, Starcom; Eleanor Hayden, CEO and Founder, Hayden Consultancy; Steve Triplett, VP, Advertising Sales, Vibonomics, a Mood Media company



The Digital Scoop: How Danone Is Connecting With Their Online Ice Cream Shopper

DAY 1



Danone's So Delicious has been offering consumers dairy-free products for more than 30 years. Its SKUs span multiple categories: frozen desserts, yogurt alternatives, plant-based beverages and coffee creamers.

The Challenge: So Delicious was losing online households faster than the overall category and they wanted to boost online shopper engagement across its portfolio. To help combat this challenge, Danone enlisted 84.51° to better understand the So Delicious online shopper and their path to purchase.

SPEAKERS

Kate Sulkey, Lead Insights Account Executive, 84.51°; and Brandon Cole, E-Commerce Manager, and Richard Cundall, Senior Category Manager, Danone

Specifically, the brand wanted to know:

- What online tactics (search, coupons, etc.) are leading to the highest engagement and add to carts?
- How are their customers' online baskets being built?
- How are they searching for their product?

The online natural foods ice cream shopper is ...

- Millennial or Gen Z
- Highly engaged online
- Focused on convenience and quality

Kroger's natural foods ice cream shopper is highly engaged online using the retailer's app and website. Three components driving the most engagement across both web and app for them are:

- Digital coupons
- Search
- Start My Cart

"To succeed in this digital age retailers must employ winning tactics that engage, convert and inform online shoppers." — Sulkey

How understanding the digital path to purchase informs actions:

- **Unlock savings, unlock spending:** Coupons, a big driver of purchases, are especially important for premium brands.
- **Crack the search code:** With search being a key driver, it's critical to test and optimize for both branded and unbranded terms, and boost search performance.
- **Make "repeat" easy:** The metrics on Start My Cart show that efficiency is valued and getting in — and staying in — the cart is important for repeat purchase and brand loyalty.

Generative(ly) Speaking: The Role of AI in CPG

The speaker panel suggested CPG brands explore and assess how artificial intelligence can best work in their organizations, but to exercise caution when doing so.

Panelists acknowledged that AI can help automate tasks and help them with personalization. Brands can partner with solution providers to create AI-generated recipes highlighting various products. When it comes to brand-retailer relationships, AI can aid with product display pages and change how marketers work with tech stacks.

In terms of guardrails, organizations such as Mondelez are operating with closed AI, not open AI programs. Brands have to strike the right balance between not being so afraid to work with AI that they're left behind, and not being overly reliant on the technology.

SPEAKERS

Charlie Menchaca, Managing Editor, Path to Purchase Institute; Cristina Marinucci, Global Head of Shopper Excellence, Mondelez International; Shekar Raman, CEO, Birdzi Inc.; Todd Hassenfelt, Global Digital Commerce Senior Director, Strategy and Execution, Colgate-Palmolive; and Kevin Yu, CEO and Founder, SideChef

Brands should also be aware of how their customers are using AI. Eventually CPGs will have to consider how to reach and influence not just human shoppers, but AI shopping programs that will be assessing products for online purchase.

As brands determine how to use AI responsibly and ethically, they should keep their companies' missions and values in mind. When vendors and agencies present AI-based solutions, remember that a demo dashboard and presentation slides are not actual solutions. Ask to see any AI programs operate in real time to get a true sense of their capabilities.

Audience-Centric Strategies to Optimize Search Impact



Murray manages the retail media side for Stanley Black & Decker, specifically on Amazon, with goals to drive margin and sales efficiency across channels such as paid search, DSP and streaming TV.

Sales data matters more to her than “vanity metrics” like ROAS. Competitor analysis tools can optimize keyword and audience targeting.

Her ultimate goal is ROI, “driving margin efficiently. ... Amazon (has) a really great audience targeting capability based off of shopper behavior. So everything you do on Amazon is tracked by Amazon and then you get bucketed into an audience. If you buy pet food, I can now target you with a pet vacuum. And so using those audiences for people whose behavior indicates that they'd be a relevant audience lets me efficiently serve our ads and to see sales growth, then move in tandem with it.”

In terms of paid search, organizing keywords and targeted keywords, Murray likes to look at a competitor and see what keywords are driving the business and ultimately mirror that.

SPEAKERS

Danielle Murray, Senior Digital Media Manager, Stanley Black & Decker; and Esteban Gamboa, VP of Sales, Stackline

ROAS is not valuable as a successful campaign metric; manual metrics matter more.

“Sometimes when I have really low ROAS I see really high sales growth. ... (It's important to be) looking at the sales trends, being able to see early activities that we're running, driving at least traffic. Then ... is that traffic translating into conversion and driving sales. And then (there's) incrementality. It is a bit of an ambiguous metric, but it's one that's been very successful for me.”



Unlocking the Intersection of Commerce and Culture: ZOA Energy

DAY 1

The speakers dove into the energy drink's massive awareness campaign and how it unlocked the intersection of commerce and culture, which Munk noted is no easy task in the particularly crowded category right now.

CMO Hellenga said the better-for-you brand, which was co-founded by Dwayne "The Rock" Johnson, wanted a campaign that was first and foremost "gutsy" and portrayed energy in a non-conventional way, focusing less on the ingredients and more on how consumers want to feel (i.e., success, confidence and The Rock's "swag"). This ultimately led ZOA to a clever "BDE" campaign tagline, hitting the cultural relevance on the head while making it entirely unique to the brand, translating to "Big Dwayne Energy."

Since ZOA at the time had pretty low velocity in stores and low awareness, Hellenga said, the campaign had to cover all bases: social, digital, TV, in-store and out-of-home. Among its activations, the campaign leaned on:

- Influencers and earned media, particularly its founder and his massive star power and social media following.
- Omnichannel marketing by including QR codes on physical ads that linked to the brand's e-commerce site to purchase.
- Complete retail media ecosystem planning with retailer partners and their RMNs.
- Stopping power in stores with commanding displays to drive velocity. Hellenga said "when [ZOA's] on display, we sell way more than when we're just stocked on the shelf."

SPEAKERS

Melanie Hellenga, Chief Marketing Officer, ZOA Energy; Curt Munk, Chief Strategy Officer, Haygarth US; and Tina Manikas, President/Global Head of Connected Commerce, Omnicom Commerce



20 Lessons to Succeed in a Fragmented Retail Media Ecosystem

DAY 1

Roberts shared lessons gleaned from SMG x Threefold's 15-plus years of building and operating retail media networks for 10-plus major global retailers:

Retail media is often defined incorrectly. It's any media that is owned or operated by a retailer and influences shoppers across the path to purchase. That's it.

It's not digital only. Retail media can be activated in-store, on retailer websites, through CRM/loyalty and offsite.

Retail media is booming, with more than 200 RMNs and nearly 5,200 channels globally.

A RMN takes resources and a complex ecosystem of partners, but those who do it right can see major growth, in the triple digits.

Why take retail media seriously? Retailer audiences are bigger than linear TV.

Each month, 97% of U.S. adults visit a grocery store vs. 49.6% of Americans watching linear TV.

It's cost-effective: In-store CPMs are 72% lower than linear TV.

Retail media is not just a conversion tool. It drives brand consideration and recommendation. In one study, shoppers exposed to a Boots Media Group campaign were 1.7 times more likely to consider that brand and 2.5 times more likely to recommend it.

Size matters, but smaller brands can succeed with a bit more strategic planning.

The top performing media channel of all time: Digital checkout screens.

The most underestimated media channel: In-store audio. That can give a 25% SKU uplift and a \$5.90 brand ROI.

RMNs find more success when treated as distinct B2B brands.

One prediction for the future of retail media: Eventually it will just be media.



SPEAKER

Amber Roberts,
Partnership Director,
SMG x Threefold

Andrew Lipsman put the focus on in-store retail media during his day two keynote address. The founder and chief analyst at Media, Ads + Commerce discussed the inevitability of stores' digital future. Retail media is evolving across ad formats and channels, and "digital advertising's third big wave reached \$50 billion in ad spending faster than the first two waves — search and social — and is destined to surpass them," Lipsman said during his presentation.

The Next Major Media Channel

Physical retail is the new TV, Lipsman said, with top retailers' in-store audiences comparable to the major broadcast TV networks.

As media and commerce converge, the lines are blurring between retailers and media companies, but brands aren't yet prioritizing investment for in-store retail media.

U.S. retailers will begin to follow the lead of non-U.S. retailers by evolving into more areas of the physical store.

The Retail Media Flywheel

For the next major media channel to achieve its potential, RMNs need to activate their "in-store retail media flywheels," Lipsman said.

Building a retail media flywheel drives exponential — not linear — growth. The retail media flywheel's foundation is first-party data from retailer loyalty and membership programs. Amazon's new flywheel of media, ads and commerce established the framework for the retail media flywheel. Even Amazon understood that the most powerful version of the retail media flywheel would be built around physical store commerce.

SPEAKER

Andrew Lipsman,
Independent Analyst
& Consultant, Media,
Ads + Commerce



Walmart's adaptation of the retail media flywheel is charting the course for the future of omnichannel retail media.

Best Buy + CNET is likely the first domino to fall in a cascade of category-adjacent RMN + digital publisher partnerships.

Elevating the Physical Store Experience

In-store retail media outperforms every other major media channel in terms of ad experience and ad attentiveness. Shoppers want in-store retail media to inform and remind them about products, helping establish both mental and physical availability. Shoppers prefer in-store retail media at the front of store, while the center aisle is the biggest opportunity.

Experiential Retail Media

In-store retail media can be experiential — like product samples — which drive incremental sales and customer lifetime value. Experiential retail media will integrate creator content to enhance physical store experience.

Measurement Makes Markets

In-store audience measurement will help agencies plan and RMNs sell advertising across targeted physical store footprints.

Brand lift measurement will help national media teams from endemic and non-endemic advertisers invest in brand-building.

Sales lift measurement will become faster and more scalable to prove effectiveness and enable campaign optimization.

Incrementality measurement will reach in-store advertising and prove that it drives unplanned purchases that drive brand and RMN growth.

Full-funnel measurement will bring short-term sales and long-term branding effects into the same conversation.

Closing the Loop

Ultimately, measurement must evolve toward incrementality and capture the full-funnel effects across channels and time.

Lipsman's final takeaways about the future of in-store retail media were:

- Physical stores are the next major media channel. High attentiveness and proximity to POS should attract national media budgets.
- Experiential retail media will elevate in-store customer experience and drive lifetime value. Product sampling, interactivity, and creator content will transform physical stores.
- In-store retail media measurement will enable market growth. It's about reach, quality, and performance – and all three need to be measured.
- Following his presentation, Lipsman sat down for a fireside chat featuring Shock Torem, SVP of media solutions at Vestcom, and Paul Brenner, president of audio out-of-home & chief strategy officer at Vibenomics.

Brands hunt for ways to stand out, to draw customers beyond traditional digital banners.

Stave started the session with a video. He'd quizzed LIVE attendees on their shopping habits. If they grocery shopped for their household, he had a couple follow-up questions:

- Did they shop online, in-store, or both? (Most do both)
- What was their latest must-have SKU?
- How did they discover it?

For product discovery, the answers varied wildly: Social media, celebrity entrepreneurs, word of mouth, dietary requirements, sampling, Instacart, shopping locally, or simply looking for a specific product.

Ultimately, it's about getting noticed.

Awada is intent on growing her Hummus Goodness business, finding success with sampling. "We tend to take this very in-person individual approach ... (working) to get the lifetime customer.

"Fortunately, retailers want us to succeed (despite taking a risk on) an emerging brand. People like to support smaller and emerging brands ... to discover things."

As for Kraft Heinz, Richards said "we are a large company, but we try to act small ... (and) do a lot of omnichannel planning.

"We want all the metrics. We need that to measure (campaign success). We have a strong household penetration and want to keep that."

And, sometimes opportunity knocks.

Recall Taylor Swift nibbling on chicken tenders at a Kansas City Chiefs football game, dipping them in what fans guessed might have been Heinz ketchup and ranch dressing. Kraft Heinz tapped into a pop culture moment and released a custom sauce, Seemingly Ranch, and a contest to promote.

SPEAKERS

Adam Stave, Founder and CEO, Swish Brand Experiences; Miranda Richards, Senior Omni Marketing Manager, Kraft Heinz; and Hanady Awada, Founder and President, Hummus Goodness





Panelists offered the following advice for omnichannel brand activations:

- Ensure your brand sticks out, but not too much. The message has to be pure, clean and communicated properly on in-store displays.
- Implement a call to action on your P-O-P materials. Use that to hold shoppers' attention beyond the 1-3 seconds you have to connect with them.

The speakers really emphasized having consistency. For example, in-store materials for a campaign should use the same recipes, font and messaging as any digital counterparts. The messaging should be concise and not overbearing to the actual brand or product logo itself. Don't take away from the message you're trying to convey.

Product packaging can also be an ideal site to communicate your company's cause marketing. If QR codes are utilized for these efforts, let shoppers know the express purpose of the codes.

Brands should think about how they can build the basket in-store during key occasions and seasons. For example, Proximo Spirits reminds shoppers of the gifting season during winter holidays with a buy more, save more incentive.

During the COVID-19 pandemic, shoppers turned to chocolate and outdoor activities such as making s'mores. The Hershey Co. embraced this by developing a Smores 365 program with endcaps and pallet drops. Charcuterie boards also grew in popularity during the pandemic. Kellanova leveraged this trend by highlighting various brands such as Pringles.

SPEAKERS

Jerry Fox, President and CEO, Bish Creative; Kurt Deck, Associate Director, Design & Merchandising, Kellanova; Tiffany Pieja, Senior Manager, Permanent Merchandising, The Hershey Co.; and Amber French, POS Manager, Proximo Spirits

Bimbo Bakeries and Bob Evans Farms partnered on a campaign uniting its Thomas' and Bob Evans brands, and elevating the breakfast occasion. Thomas' bagels and English muffins as well as Bob Evans egg whites, Simply Potatoes and Owens sausage were spotlighted through the program.

The Journey to Partnering

"We were looking for a partnership, and it's interesting because our brand team wasn't quite on board with Bob Evans, because it didn't make sense like peanut butter and jelly or Thomas' bagels and cream cheese," Plehn said. "So, it took a little bit of further digging, and we looked at things indexing together. ... I was able to go to bat because we have the same shoppers — we're trying to hit the busy families — we had the same barriers that we were trying to overcome. So, ultimately, we ended up selling our brand team on it, was able to get the funding and they're [now] asking if we can do it twice a year."

SPEAKERS

Cyndi Loza, Senior Editor, Path to Purchase Institute; Tony Fung, Director of Shopper Marketing and E-Commerce, Bob Evans Farms; Stephanie Plehn, Omnichannel Marketing Manager, Bimbo Bakeries; and Greta Santori, Director, Client Leadership, Mars United Commerce

Timeline

Ideally the campaign would have started in September 2023, but since it took a while to get the funding from the brand team, Plehn explains program planning didn't kick off until March 2024. The campaign kicked off in September and ran through October.

The goal for both brands was going after private label household penetration (given the inflationary times we're in and people trading down to save money). Being able to have a bunker display, and get the brands' SKUs co-merchandised together was also key for Bob Evans, Fung said.

The campaign marketing plan also included:

- Exclusive breakfast recipes on meal planning platforms;
- Social influencers and social media posts; and
- Joint retail media (onsite and offsite) with Meijer, Walmart, Kroger, Giant Eagle, Ahold Delhaize and Albertsons Cos.



SPEAKERS

David Lewis, Senior Digital Shopper & E-Commerce Marketing Lead, Proximo Spirits; Mitch Cristol, VP Practice Lead - Beverage, InMarket; Max Leonesio, Senior Director, E-Commerce, Proximo Spirits; and Tommy Shaw, Head of Media, Five Eighty

New media networks and proliferating media channels plus an influx of private label alternatives are forcing brands to rethink how they engage with consumers, acquire new buyers and drive loyalty.

Marketers in turn are pivoting to partners and solutions that holistically close the loop between real-world consumer intent and real-time commerce.

Lewis, Cristol, Leonesio and Shaw discussed the intricacies between data-driven commerce, always-on brand experiences and real-time reach to unify the consumer journey, maximize growth and drive share across an entire brand portfolio.

There is significant fragmentation in retail, Cristol said, with consumers visiting upwards of 20 stores a month. “The proliferation of retail media is leaving us all a bit whiplashed. A seamless, unified shopper journey is critical.”

Three key takeaways:

- **The power of partnerships.** Joint business planning with retailers has become more critical than ever. Collaboration isn't something that's nice-to-have; it's crucial for mutual success. “As retail media has grown, it's made retailer relationships for a brand all the more important,” Shaw said. “On the agency side it's important for us to push boundaries. (We need to) show what's happening outside alc-bev, but also be a partner.”
- **Filling the gaps.** Retail media networks are transformative, but there is plenty of untapped potential in leveraging shopper media technology partners to expand reach and fill gaps in coverage.
- **E-commerce as a connector.** E-commerce is not just a channel, but the bridge between marketing and sales. When done right, it drives both online and offline business objectives seamlessly.



Maria Bailey invited five mothers from the Schaumburg, Illinois, area to share their firsthand perspectives on marketing. The moms discussed how they learn about products through word of mouth and social media, including Facebook. Some of the mothers only use Facebook primarily for various mom-themed group pages.

The mothers favored loyalty programs such as Target Circle where the required lift for savings and rewards is minimal. Reward-based mobile apps with limited cash-back returns were not considered worth the effort.

SPEAKER

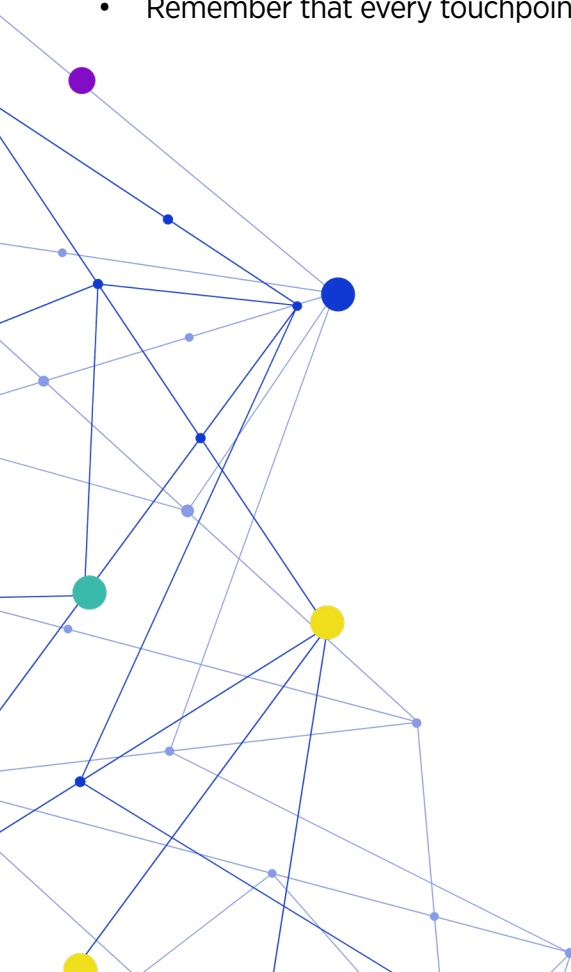
Maria Bailey, CEO,
BSM Media

When it comes to mothers born during the late 1990s and early 2000s, brands can apply the following insights and motivators:

- Plant the seed and allow moms to grow it.
- Create occasions for collaboration.
- Tap into moms' love of learning.
- Leverage "friendly competition" among parties.

Future opportunities for brands as it relates to Gen Z moms include:

- Creating packaging and experiences that deliver education and empowerment.
- Developing educational entertainment that's delivered by podcasts and DIY videos.
- Create IRL (in real life) socializing like "Mommy Parties" and on-the-road events.
- Create unboxing moments moms can share with friends and followers.
- Generate content around the new reality TV of Twitch.
- Find gaming opportunities delivered in unexpected places, such as queues or digital content.
- Communicate using memes.
- Remember that every touchpoint is Instagram worthy – from packaging to retail displays to eatery walls.



Navigating the Future of Retail Media: Staying Ahead of the Curve

DAY 2

P2PI moderated a panel discussion on the present and future of retail media. Clarizio pointed out that by the end of 2024 retail media ad spending will rise 26% to \$54.28 billion, and nationally, spending is projected to reach \$153.3 billion this year. Schwartz also noted the significant growth in the industry, but said there are some signs of softness.

SPEAKERS

Lynda Clarizio, Co-Founder and General Partner, The 98;
Mark Schwartz, RVP of Sales, Mirakl Ads; Jackie Barba, Digital Editor, P2PI

While smaller advertisers are beginning to explore retail media, their contributions remain modest compared to larger brands, leading to a concentration of spending among major advertisers. As the retail media landscape evolves, there may be increased opportunities for smaller advertisers to participate.

Another issue highlighted is advertisers are struggling to know where to invest their next dollar, which is underlined by the lack of standardization, fragmentation and transparency in measurement.

Other takeaways and stats from Clarizio and Schwartz include:

- Third-party sellers on Amazon's marketplace are significantly outperforming established brands on bottom-of-funnel advertising, according to new data.
- Many brands are borrowing retail media budgets from trade marketing departments and don't foresee investment increasing that much over time.
- Marketers need awareness tactics to grow their customer base (top of the funnel). They should explore CTV, programmatic and even offsite retail media.
- Sponsored onsite ads are at the bottom of the funnel driving conversion and better ROI.
- For retailers to stay ahead, they need to recognize and address two challenges: measurability and ease of use.
- Managed service is necessary, but overly depended on, and retailers can gain another 50% to 60% in ad spend by opening up the "long tail."
- Schwartz said "there's a flywheel effect that comes from adding more vendors to the pool" — cost per clicks get more competitive, targeting data gets enriched, fill rates go up and higher satisfaction from brand partners.



Emerging Brands 2.0: Navigating Evolving Market Dynamics

DAY 2

Emerging brands excel in innovation, authenticity and customization.

Emerging brands can:

- Provide energy and distinctiveness at retail, satisfying unmet needs; drive traffic and trip conversion, creating halo effects.
- Appeal to Gen Z; create appeal while brand preferences are yet to be solidified.
- Exclusive and custom merchandising willingness; drive loyalty to preferred retailers.
- Deliver shopper centricity, “me-ness;” turning the focus to the shopper.
- Help retailers achieve sustainability goals; emerging brands often view sustainability as table stakes.
- Transfer online excitement to store; digital native shoppers follow digital native brands to brick-and-mortar.

Imitation is flattery. Larger brands and private labels attempt to compete more directly.

SPEAKER

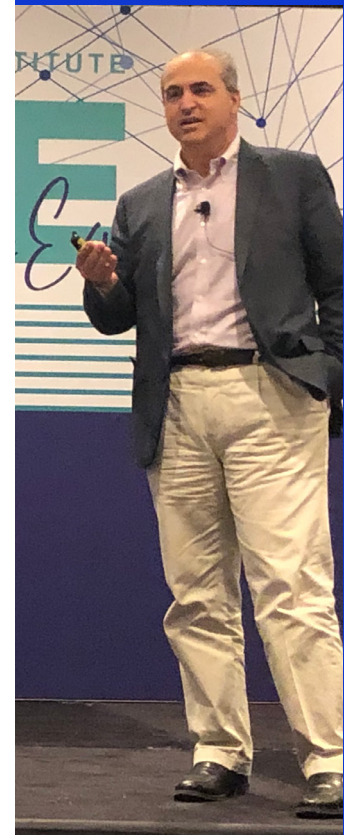
Leon Nicholas,
Vice President,
Retail Insights &
Solutions, Smurfit
Westrock

Three things emerging brands need to know to successfully launch and scale in retail:

1. **Be yourself.** Your package and display are how your customers interact with you at retail. Your display needs to be you.
2. **Tailor your message.** Find a shared voice by tailoring your messaging to the retailer, its agenda and its shopper.
3. **You can do it — with help.** Find partners to help you navigate the areas that are most challenging to you.

Analyze the guidelines and standards of target retailers to understand the boundaries and opportunities for customizing your brand presence.

Retailers need emerging brands. Retailers need you to deliver.



DAY 2

Exploring Retail Strategies for Diverse Consumers

In 2045, the U.S. becomes a majority minority country, when 25% of the U.S. population will be Latino, 14% African-American and 8% Asian.

There is opportunity in those demographics.

To reach Latino customers, we need to look past a lot of misconceptions, of who the Latino shopper is and what they want from retailers.

“Retailers must do this with intention and in a real way,” Sheehan said. “Mexican” is not synonymous of the typical Latino; 40% come from a country other than Mexico.

H-E-B has a winning formula. “(It’s) super effective at targeting Latino consumers. It’s inherently built into their DNA. They don’t have to think about it; they just do it. It’s a good case study of how a brand builds on its own authenticity.”

Younger Latino consumers want to be seen, represented. Seventy percent of the Latino population speak Spanish at home, so a brand simply translating into Spanish isn’t going to cut it. “There is an element of agencies and brand marketers targeting with very simple strategies, but we’re so much more complex than that.”

And with 65 million Latinos in the U.S., “you want to talk to us because we are big and we buy a lot. Our spending power is \$3 trillion.”

Quality, fresh ingredients and a sense of community, if retailers nurture that, it can have a huge impact.

SPEAKER

Diana Leza Sheehan,
Founder and Principal
Consultant, PDG Insights

