



Retailers vs. Packaged Goods Companies: Worlds Apart?

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About RSR

- Founded in 2007 to quickly become the leading source of insights for trends in retail technology, and retail in general
- Mission: To elevate the conversation about retail technology to a strategic level within the retail enterprise. Our differentiators:
 - *Objective Insights into the business challenges and opportunities that retailers are addressing in today's marketplace, and how Winners win*
 - *Pragmatic Advice to both retailers and solution providers*
 - *Extensive Retail Industry Experience*
 - *A Deep Bed Of Research into retailers' technology investment plans and the business opportunities and challenges that drive those investments.*

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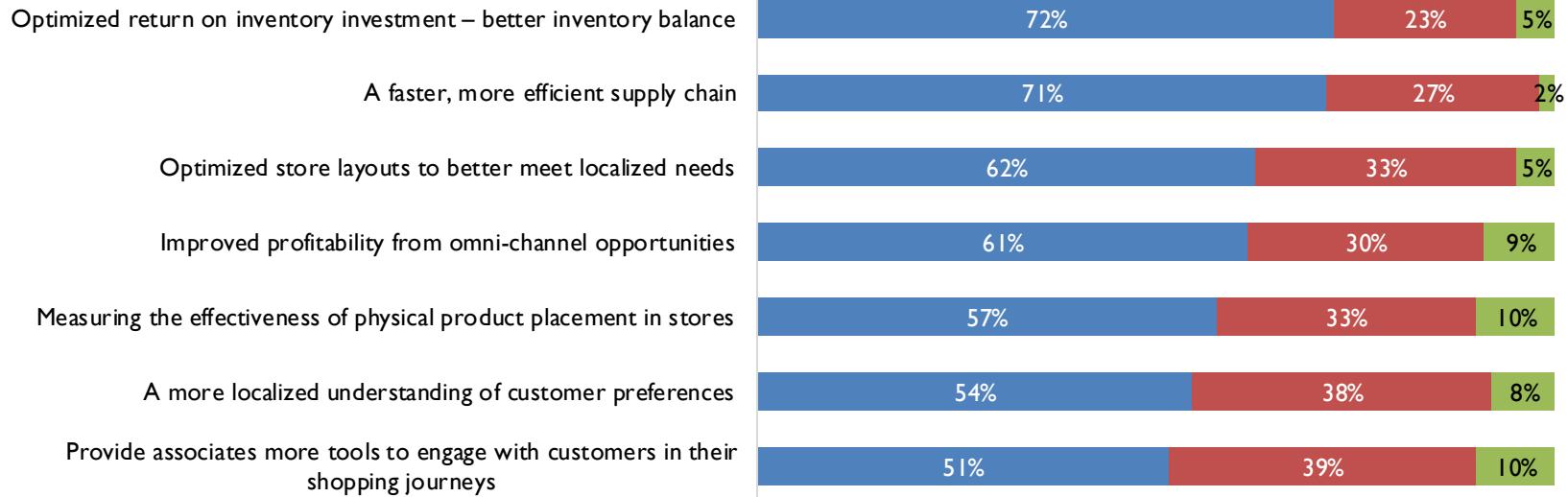
Research Overview

- A very different research project for RSR
 - Merchandise planning has long been about what brands want to sell (more than about what shoppers want to buy)
 - This model no longer works for consumers, and they are becoming more vocal about that
 - As a result, we queried both sides – retailers AND CPG providers - to find out their challenges, internal struggles and future plans in order to make real progress
- Wanted to understand the extent of product category managers' current and future realities on both sides of the trading relationship
- Also wanted to home in on how planners use technology, particularly geo-location data and analytics, to better localize and refine assortments, prices and promotions
- Who's to blame?
 - Are retailers and suppliers in the fight to bring more relevant products to shoppers together?
 - Or are they truly worlds apart?

The High Value Of Location Data

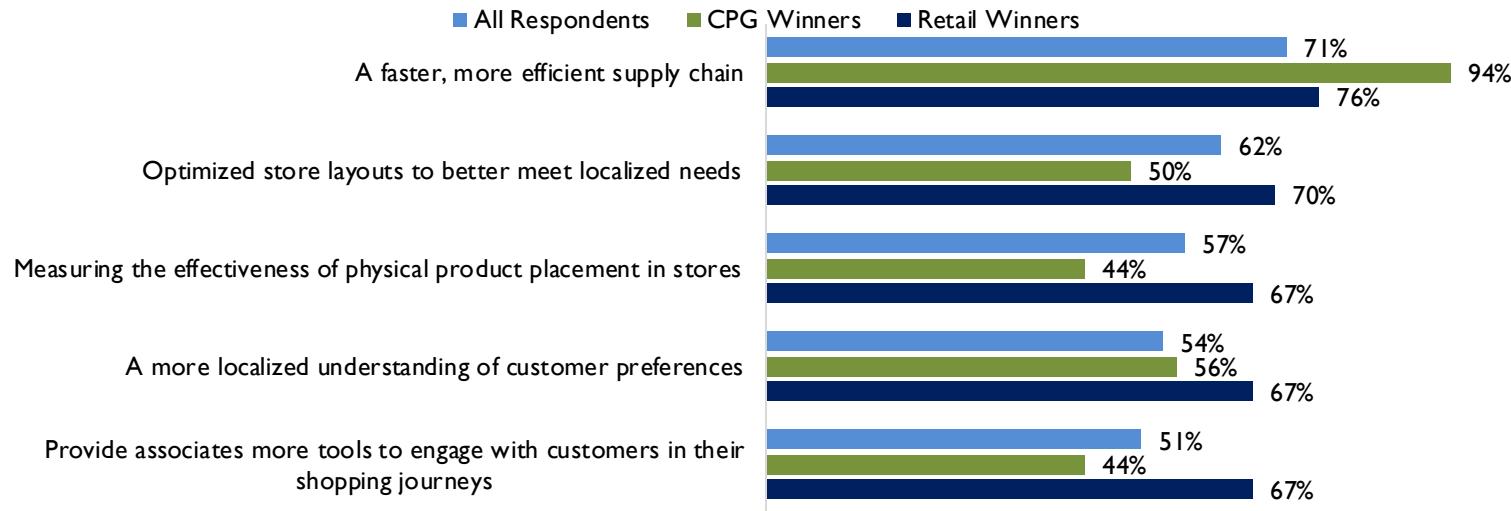
How much value is there in using geo-location data to achieve the following?

■ High Value ■ Some Value ■ Little/No Value



A Matter Of Focus

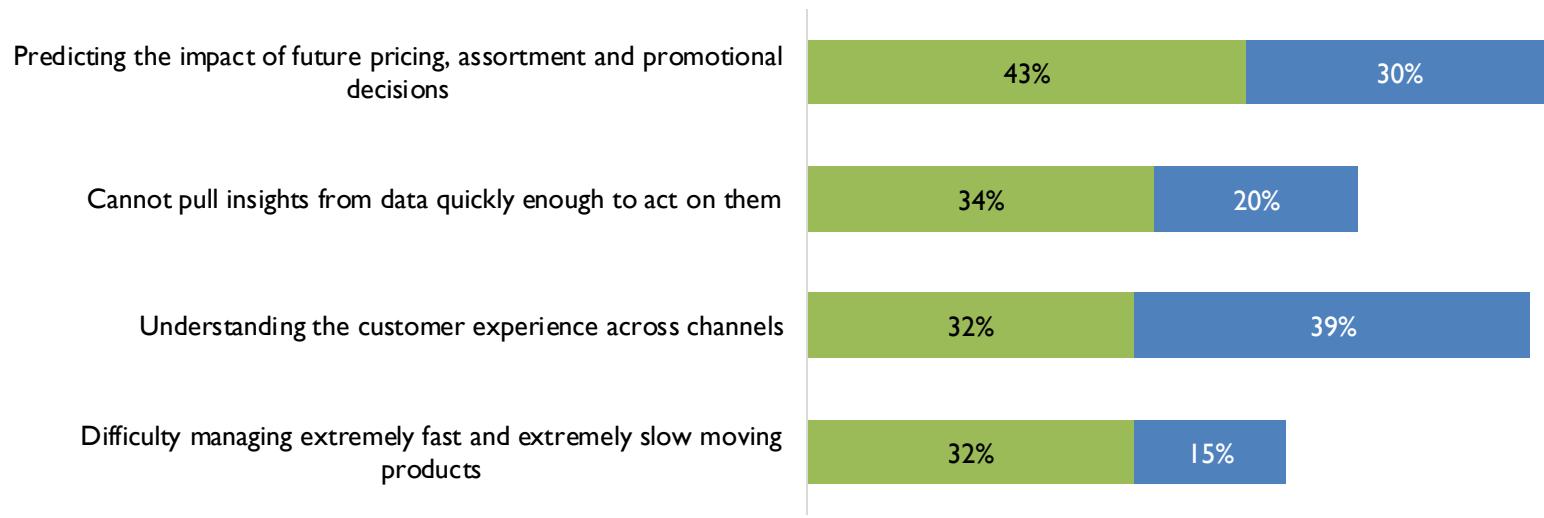
How much value is there in using location data to achieve the following? ('High Value' - Selected Differences)



Different...

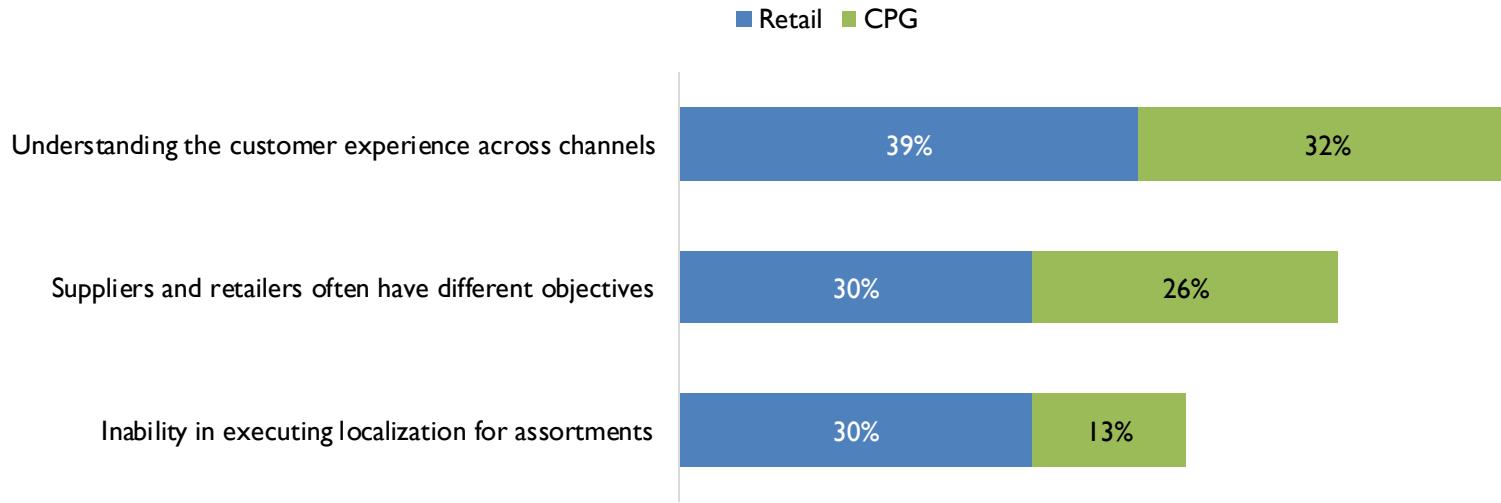
CPGers' Top Category Management Challenges (Compared To Retailers)

■ CPG ■ Retail



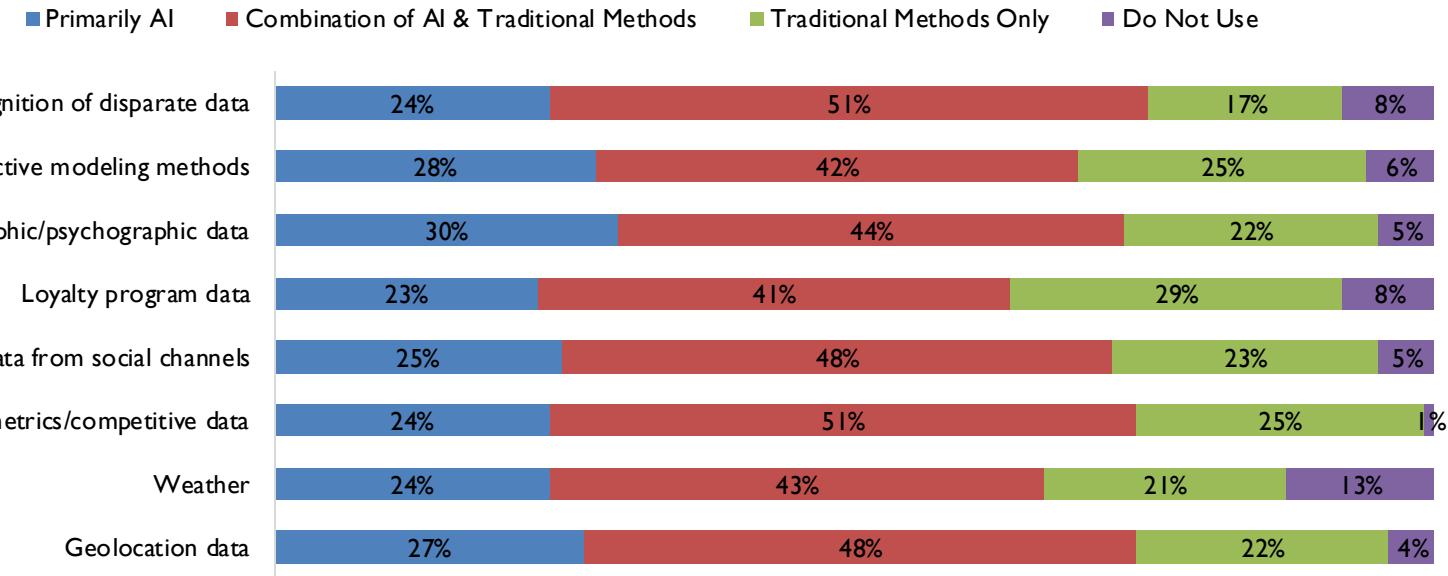
...Points Of View

Retailers' Top Category Management Challenges (Compared to CPG)



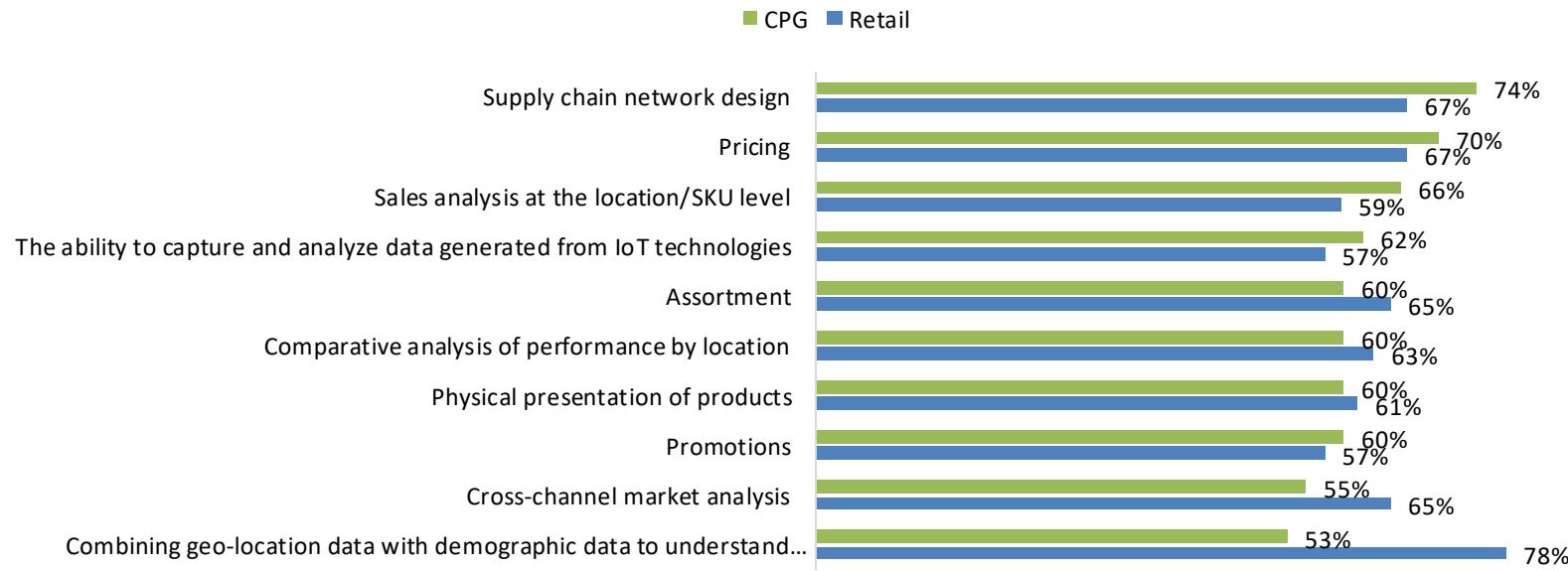
New Analytical Tools Are Gaining Acceptance

How does your company use the following to improve forecasting?
(All Respondents)



Location Information = Real Power

How do you perceive the value of location information for the following?
('High Value')





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