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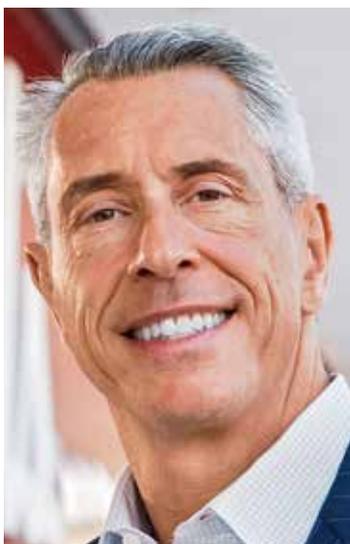
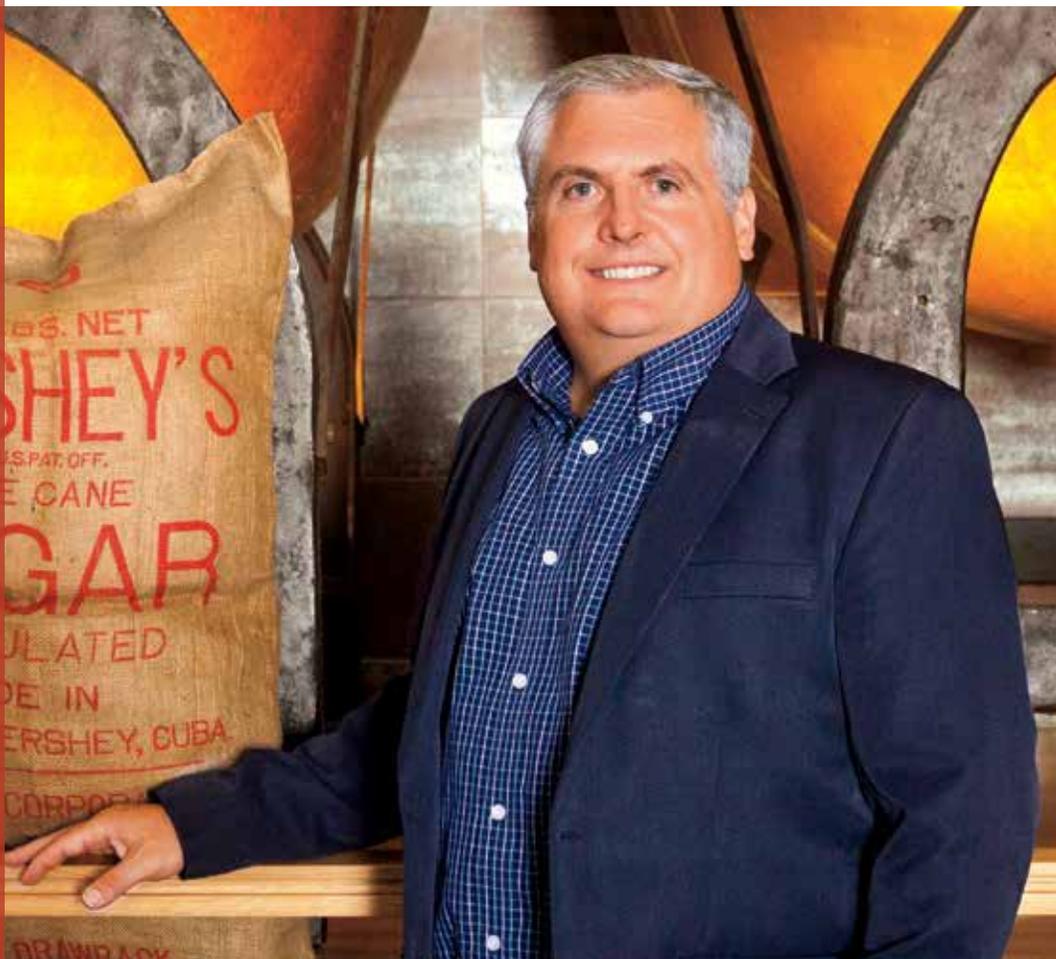
Shopper Marketing

WHO'S WHO

in Shopper Insights



Despite a vast array of methodologies and a wide variety of job titles, this elite group of 160-plus marketers shares the common goal of understanding what motivates shoppers so their CPG brands and retailers can deliver better solutions more efficiently.





THE HERSHEY CO.:

DAVID NOLEN, Senior Director, U.S. Category Strategy & Insights

David Nolen partners with retailers to leverage his company's insights and recommendations as senior director of category strategy and insights in the U.S. He and his team work to cull the fire hose of information flowing in from multiple sources on a daily or even hourly basis in order to deliver concise, actionable insights.

How do insights fit into your organization?

NOLEN: Shopper and consumer insights are the fuel that drives the engine of category management. Every recommendation we provide our retail partners is grounded in an insight that we uncovered, through either their internal data or insights we have cultivated through our own proprietary research. Our insights team reports to our insights and analytics group within the company.

What are some of the key skills required to excel in insights?

NOLEN: It is important to start with the end in mind, given the many different streams of data available today. Our teams develop a hypothesis and then leverage the appropriate source or insight to prove it out. This may require new research or can be pulled through existing studies. The most important step is to build a compelling story that drives transformational action to address a latent or unmet demand.

How does Hershey use research to develop consumer insights?

NOLEN: Leveraging insights is at the center of everything we do. Through the years, we have built an extensive database of rich insights, whether retailer-specific or general, built around the shopper or consumer. We continue to invest in new insights to ensure we are ahead of the fast-changing marketplace.

What emerging technology and techniques do you leverage to develop insights?

NOLEN: Our team is leveraging both virtual reality and neuroscience. Neuroscience helps us understand the emotions shoppers go through as they make their shopping decisions.

Are any recent trends significantly impacting your team's work?

NOLEN: As more shoppers continue to shop online, we are working to understand the role that impulse snacking categories like confections play in the path to purchase. We are uncovering a lot of new insights around this growing trend.

What recent work by the Hershey insights team stands out to you?

NOLEN: We conduct a lot of research on the c-store channel. Recently we released a new "gold standard" planogram based on insights about how shoppers purchase instant consumable standard and king-size items. Leveraging panel and loyalty card data, we un-

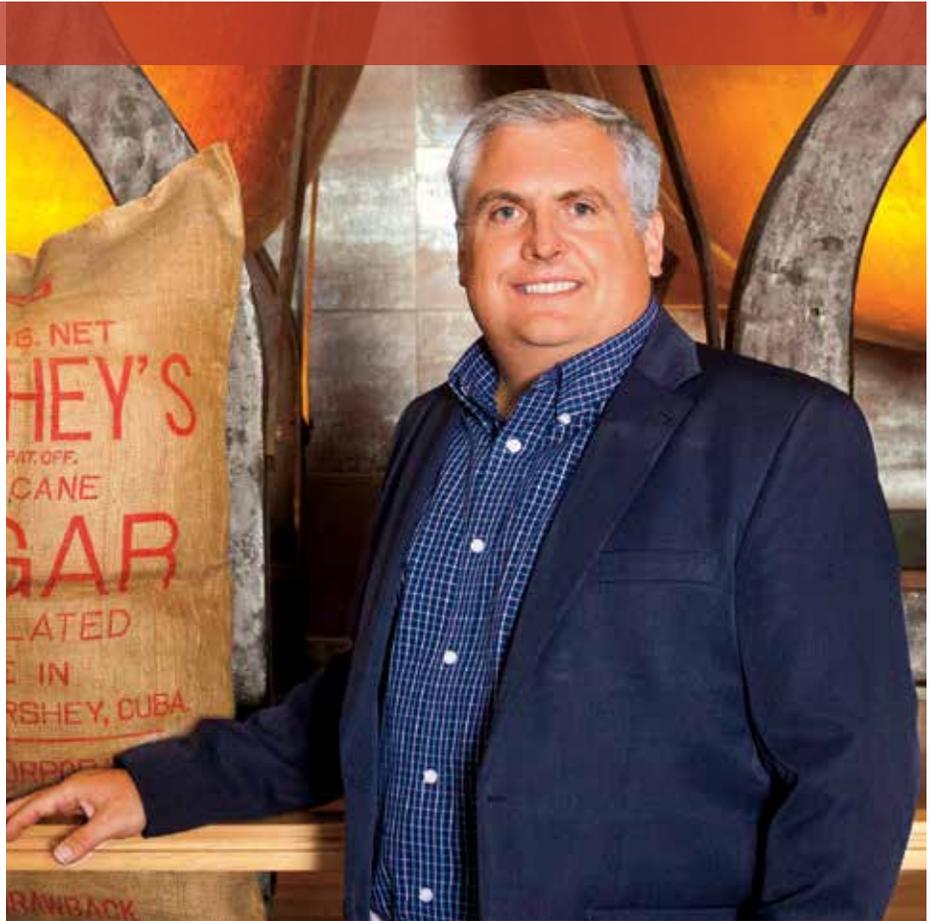


Photo by Jennifer Stumbaugh

covered that shoppers typically stay with the same pack size and it's less common to switch. Knowing this, we have released a new planogram that segments king and standard bars. This makes it much easier for shoppers to find what they are looking for. Shoppers only have so much time, so it is important to help them find what they are looking for quickly. We tested this concept and it has proven to be beneficial for the entire category.

What's the most rewarding aspect of your work?

NOLEN: The most satisfying aspect is partnering with retailers, seeing their faces light up as they understand the breakthrough insights and then walking into a store and seeing our insights and recommendations executed and providing incremental growth.

What's the biggest challenge facing the insights discipline?

NOLEN: It is so easy to get lost in the insights and not provide meaningful recommendations. Reporting the news is easy. The difficulty is bringing the insights to life in a clear, concise manner and communicating what should be done differently to deliver results in store. We call this process "idea to concept." Once it is a concept, we can visually represent the idea that eventually transforms to an action at retail.

What's next for the insights discipline?

NOLEN: We continue to evolve our insights as technology changes and our retailers continue to seek new methods to drive trips and increase basket size. Those who elevate the shopping experience will be the winners by building a loyal shopper base. Many retailers continue to build new formats and remodel stores to deliver the best experience possible for their customers. We want to ensure retailers are looking to partner with The Hershey Co. for thought leadership and expertise in leveraging actionable insights to deliver profitable growth.

ICON KEY

PATH TO PURCHASE
INSTITUTE

Institute member

3M

PATH TO PURCHASE
INSTITUTE

KEITH ALBRIGHT, Global Shopper Leader

Albright continues to drive a shopper-centric approach. His group leverages custom and secondary research to identify shopper needs, wants and desires. He sees shopper insights as a key element for 3M's shopper marketing teams to drive growth with their accounts.



ABBOTT

PATH TO PURCHASE
INSTITUTE

DAVORA BEATTY, Senior Manager, Shopper & Category Development

Beatty develops insight stories derived from shopper behavior research integrated with macro trends and forward thinking. This creates category strategy and action plans that deliver retailer category growth in partnership with Abbott businesses.



AHOLD DELHAIZE

PATH TO PURCHASE
INSTITUTE

DAREN RUSS, Director, Business Insights

Russ is responsible for working as an internal consultant to key executive leaders. He works collectively across the organization to drive business understanding and strategic direction rooted in the needs and requirements of consumers.



JASON THOMAS, Manager of Shopper Insights, Retail Business Services

One of the co-founders of shopper insights at Delhaize, Thomas is currently responsible for both analytical algorithm development as well as the deployment and socialization of insights to a variety of internal business partners.



MICHAEL WEINSTOCK, Vice President, Insights

ALBERTSONS

PATH TO PURCHASE
INSTITUTE

PAULINE BERRY, Director, Consumer & Shopper Insights

Berry provides understanding of the retailer's shoppers, how they make store decisions, and how to best communicate with them. Specific areas of focus include advertising, shopper marketing and e-commerce.



DEB FIFLES, Vice President, Shopper Insights

Fifles leads the retailer's consumer and shopper insights function, which is responsible for custom research across the enterprise. Her team champions the voice of the customer, providing insight and guidance to grow shopper loyalty and improve ROI.



KATHY HAYES, Director, Consumer & Shopper Insights

BACARDI & CO.

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SHAWN FITZGERALD, Director, Commercial Insights

BAYER HEALTHCARE

PATH TO PURCHASE
INSTITUTE

KEVIN ALCOTT, Director, Category & Shopper Solutions, Walgreens Team

FRANK FAY, Manager, Category & Shopper Solutions

RICH KLOENNE, Senior Manager, Shopper Insights

Kloenne leads the shopper insights team in uncovering deep insights and partnering with the shopper marketing and category solutions teams to develop transformative action at retail. He is responsible for providing guidance across the entire OTC portfolio as well as an understanding of the total healthcare environment.



ROBERT SKEHAN, Senior Manager, Category & Shopper Solutions

Skehan leads the development of category and shopper insights delivered to customers via a national strategic category leadership platform, which is customized by retailers translating opportunities into actionable solutions for customers. He was recognized by *Progressive Grocer* with a 2016 Category Captain award for the sun care category.



SCOTT TRAISTER, Manager, Shopper Insights

Traister has more than 17 years of experience in strategic insights, market research, shopper and product marketing.

BEAM SUNTORY

PATH TO PURCHASE
INSTITUTE

ANNE FRITSCH, Senior Director, Consumer and Marketplace Insights

JACKIE HILLBACK, Vice President, Consumer Insights

BEST BUY

LAURIE KRAUSE, Vice President, Market and Consumer Insights

Krause is responsible for business and market intelligence, marketing and consumer research, customer experience insights and advanced analytics, enabling fact-based organizational decision-making and strategy development. Prior to joining Best Buy, she was the director of consumer research and competitive intelligence at Ally Financial (formerly GMAC), where she transformed the auto finance firm into a customer-centric online banking brand.



BIC

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INSTITUTE

PAT FITZSIMONS, Team Leader, Category Management & Shopper Insights

MELISSA ZWEIG, Shopper Insights Manager

BROWN-FORMAN

PATH TO PURCHASE
INSTITUTE

LORI OLES, Shopper Insights Group Manager

Oles leads the on- and off-premise shopper insight function. Her team is focused on the development and delivery of insights to drive category and brand growth.



BUMBLE BEE SEAFOODS

CORLISS COLLIER, Senior Director, Category Development & Insights - Center of Excellence

Collier leads a team of dynamic professionals in engaging shoppers and retailers alike through innovative research, insights and marketing programs. Seeing insights drive action and come to life in the marketplace while delighting shoppers and consumers is her greatest satisfaction.



BURT'S BEES

CAROLINE KLOMPMAKER, Associate Director, Global Insights

BUTTERBALL

IVAN ARRINGTON, Director of Innovation, Insights and Emerging Channels

Arrington is passionately analytical. He leads a consumer insights team charged with uncovering the secrets of Thanksgiving and understanding everything about turkey enthusiasts.



NATALIE KINNEY, Senior Insights Manager

CAMPBELL U.S. SALES

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DAWN AHO, Customer Analytics Lead

ERICA BEILENSON, Shopper Insights Lead

KRYSTIE CUMMINS, Shopper Insights Lead

DEIDRE FORCILLO, Shopper Insights Lead

KE RAN, Shopper Insights Lead

Ran leads strategy development and shopper insights identification of e-commerce, the value channel and top grocery customers for Campbell Soup Co. across the Campbell's, Pepperidge Farm, Campbell Fresh and Plum Organics portfolios.



MARC REYNOLDS, Director, Shopper Insights



JON TROY, Director, Category Strategy & Retailer Insights

See profile on page 6

CLOROX

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KAREN CHEN, Associate Director, E-Commerce and Omnichannel Shopper & Retail Insights

ANITA CRAIG, Global Insights Manager

BRIAN HOFFSTEDDER, Director, Global Shopper & Retail Insights – Digestive Wellness

Hoffstedder and his shopper and retail insights team focus on helping Clorox brands deliver the best possible category purchase experience. He and his team study evolving omnichannel dynamics to identify and activate new category growth ideas, driven by Clorox brands.



AMY STEVENS, Associate Director, Shopper Insights, Walmart & Sam's Club

Stevens is responsible for defining, developing and building shopper and consumer insights and solutions for the company's Walmart and Sam's Club sales, marketing and category management teams to utilize in driving sales and category growth.



COCA-COLA

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JOE DAVIS, Group Director, Marketplace & Shopper Insights

Davis is the shopper insights team lead for all national sales, commercial and shopper marketing initiatives in the U.S. at the company, and stewards its approach to shopper-based growth.



STEPHANIE KOWITZ, Senior Manager, National Shopper Insights – Convenience Retail

Kowitz is responsible for leading the development of shopper strategies focused on driving growth for convenience retail partners and Coca-Cola. She has presented educational sessions through The Association for Convenience and Fuel Retailing and led numerous sessions with key customers helping to bring shopper insights to action by sharing recommendations and best practice methods.



CHRIS RUSSELL, Group Director, Shopper Insights

Russell leads a team of 10 members in identifying key connection opportunities along the retail path to purchase – uncovering unmet shopper needs – and helping retailers improve satisfaction, sales and loyalty with their most important customers. He likes to say, "You can't have shopper marketing without shopper insights."



DAREN SORENSON, Director, Shopper Marketing Insights

COLGATE-PALMOLIVE

PATH TO PURCHASE INSTITUTE

MIKE DILLON, Senior Manager, Shopper Insights, CVS

Dillon creates and synthesizes insights to implement shopper strategies, personalization programs and retail activation at CVS/pharmacy. His background includes consumer research, category management and sales. Key accomplishments include increasing Colgate oral care personalization net sales lift with strategic targeting programs and leading the shopper research for the Gillette "Guy Aisle" during a previous role at Procter and Gamble.



DOUG PAXSON, Senior Manager, Shopper Insights

Paxson is responsible for understanding shoppers through the path to purchase and supporting both Colgate and retailers with shopper-centric recommendations. He specializes in utilizing loyalty data to identify shopper behavioral trends.



CONAGRA BRANDS

PATH TO PURCHASE INSTITUTE

TIM MILLER, Senior Director, Go-to-Market Insights

Miller is responsible for setting the strategic priorities and leading the go-to-market insights organization. His team is dedicated to the understanding of what inspires and motivates shoppers along the entire path to purchase in order to influence activation strategies.



CONAIR

PATH TO PURCHASE INSTITUTE

DEBORAH IORIO, Director, Consumer Insights & Category Management

Iorio leads the consumer insights and category management team supporting Conair's personal care division. The team creates in-depth analytical presentations highlighting industry and consumer trends, drilling down to the item level to deliver critical and creative analysis of the underlying drivers of business performance.



Photo by Steve Hockstein

PINNACLE FOODS: HEDDY PARKER DEMARIA, Vice President, Consumer and Customer Insights

As vice president of consumer and customer insights at Pinnacle Foods, Hedy Parker DeMaria leads the company's consumer and customer insights team in support of the full breadth of the company's research needs. According to DeMaria, the consumer is at the core of all business decisions at Pinnacle. In her role she reports to the president of the frozen and grocery business unit, and she sits on the leadership team both for the unit and for Pinnacle's marketing leadership team. DeMaria brings more than 20 years of market research experience to her position, having previously held shopper and consumer insights roles for leading companies such as VF Corp., Kraft Foods, Nabisco and The Nielsen Co.

You've been in a variety of roles, some spanning both consumer and shopper insights. How do you differentiate the two?

DEMARIA: I think of consumer insights and shopper insights as complementary functions. Shopper insights address a specific mindset of consumers as they become shoppers. Our consumers don't become different people when they're shopping. They bring everything that makes them who they are – their values, their attitudes, their perceptions. They're just performing a specific task in which certain values and attitudes become more important.

Are there any interesting facets to how Pinnacle Foods uses research to develop consumer insights?

DEMARIA: I think of research as our toolkit. We always start with what we are trying to achieve. What is the opportunity or issue that we need to address? And then we go to our toolkit to find the appropriate type of research to address that opportunity or solve the problem.

Is there a recent business issue at Pinnacle that your group diagnosed in this way?

DEMARIA: One that probably stands out the most for me is our recent work we did in the baking category, which had been declining year upon year. It was basically falling off the cliff and taking our brand off as well. It was a tough diagnosis, because what people

said and what they did were two different things. People said they were leaving the baking mix category because they wanted to eat healthier. We learned that most were eating as many sweets as ever. They were just shifting to more convenient methods of getting these sweets. We also learned that as household size was shrinking and as people were becoming more concerned about waste, a full-size cake began to make less sense for many occasions.

How was your company able to address these issues?

DEMARIA: We developed a new Duncan Hines product called Perfect Size for 1. It's a new format of baking mixes that addresses all the consumer barriers. It's extremely convenient. You just pour it into a mug, add a little bit of milk or water, and microwave it for about a minute. And it's a single-serve portion size so it allows for easy cleanup, no waste.

This product launched in February, and it turned the category around. Last year, the category was declining at about 6%, and latest year-to-date numbers show cake mixes are growing at about 1%. Duncan Hines has gained more than 7 share points in the cake mix category, and the product is on the path to reach \$100 million in sales in year one.

How do you think companies should handle their consumer insights function as the marketing landscape continues to evolve?

DEMARIA: My philosophy is that an organization is a lot like a living, breathing body. It needs oxygen not only to survive but to thrive. And insights are a company's oxygen. A company with a strong insight ability will be at a competitive advantage. Companies today are under enormous pressures to cut costs. As a result, the role of insights can be denigrated and made less central to business operations. I caution companies that choose this path. It's a funny thing about oxygen. You often don't realize its value until it's gone. No organization will live long without it, much less thrive.



Photo by David Fonda

CAMPBELL U.S. SALES: JON TROY, Director, Category Strategy & Retailer Insights

Jon Troy has had a varied career in shopper insights. His unorthodox path has spanned decades and categories that have included general merchandise, household products, health and beauty, OTC and food. He's worked at a diverse mix of companies that includes Boston Beer Co., A.C. Nielsen, Proscapa Technologies, Johnson & Johnson, Church & Dwight and Campbell Soup Co. Today, Troy brings that varied experience to bear as leader of the category strategy and retail insights efforts for the newly formed Campbell U.S. Sales organization, which includes the Campbell Fresh, Plum Organics baby food, Pepperidge Farm and Campbell Soup Co. businesses.

In what ways has your diverse career helped you be more effective in your current role?

TROY: It's given me a great perspective across the entire box. You learn that much of this stuff is transferable. Things that I've used in the past and learned in categories like Tylenol and analgesics and pain relief also work in laundry detergent and cat litter. Understanding the consumer at the point of purchase and meeting their needs, that doesn't change dramatically from category to category.

How do retail insights fit into your organization?

TROY: We structured our new organization to make sure that insights are at the heart of what we do. It's really a key driver for our sales organization and one of the key strategic pillars that our leadership is committed to excelling in.

What are some of the key skills required to excel in retail insights?

TROY: I think the most important is intellectual curiosity. You need a passion for wanting to know why. It's always about why. A lot of people who are less involved in insights tend to mistake information for insights. But insights are truly about why the information leads to uncovering opportunities. And then the other piece that is important is a bias toward action. As organizations, we don't need

more insights that are interesting. We need to meet shopper needs and drive category and brand sales.

What do you see as the biggest challenge facing the insights discipline?

TROY: It's the same thing that's been a challenge for a long time. I think it's exacerbated over the last few years. That's patience. Uncovering deep insights and bringing them to action just takes time. We're getting better at doing it faster. Technology certainly helps. But the world is moving in some cases faster than we can deliver great insights.

How are you addressing that challenge at Campbell?

TROY: One of our solutions is always having an insights pipeline by working with our customers and partners who are doing the research for us to have constant insights. It may still take 12 to 18 months to get something from concept to execution. But if we have a lot of them in the pipeline, we're delivering more often than every 12 to 18 months, and that helps a bit.

What do you see as being next for the insights discipline?

TROY: One is virtual reality. We see some interesting technologies coming out where you can collaborate with people in virtual rooms and work with consumers in that same kind of environment. Another is online and omnichannel. That's going to continue to grow in importance and value. Foresight research is also definitely emerging into something that we believe will be a difference-maker.

Is there anything else you would like to add about your work?

TROY: Personally, I've been doing this for a long time, and right now I couldn't be happier. It's a great place to be and continues to be exciting. There are more and more points of purchase and new demographics and new learning. It's not like once you've nailed the shopper, you're all set. Things continue to change. And that's really exciting to me.

CONSTELLATION BRANDS

PATH TO PURCHASE
INSTITUTE

KATIE SURVANCE, Senior Manager, Shopper Insights



Survance leads the shopper insights team for Constellation Brands' beer division across both off- and on-premise. Her focus is to champion the voice of the shopper as the company drives change across the industry along the path to purchase.

COTY

PATH TO PURCHASE
INSTITUTE

JESSICA KALINGER, Senior Director, Category Management & Shopper Insights

LISA PANCHAL, Global Lead, Shopper Insights and Trade Activation

CVS HEALTH

PATH TO PURCHASE
INSTITUTE

MATTHEW DACEY, Vice President, Loyalty & Personalization



Dacey is responsible for the business strategy and customer experience associated with the ExtraCare savings and rewards program. Prior to his current role, he was leading several critical customer and front-store growth strategy initiatives. His passion lies in understanding the customer, and creating experiences that inspire and excite her.

CARRIE FLYNN, Senior Director of Customer Analytics

CARON MERRILL, Director, Customer Insights

SANGEET UTTAM, Senior Director, Retail Strategy & Analytics, ExtraCare Loyalty & Personalization



Uttam has deep expertise in customer strategy and targeted multi-channel marketing. He is leading a team of business and advanced analytics professionals developing personalization strategies and program innovation to drive CVS' carded loyalty program ExtraCare.

DANONEWAVE

SURESH GANAPATHY, Senior Director, Strategy & Insights: U.S. Yogurt-Danone

Ganapathy currently leads strategic consumer insights and analytics for the Danone organization and is part of the marketing leadership team and global insights leadership team. Past experience includes 15 years at Kraft and Mondelez, working across multiple categories and regions with an aptitude for generating insights for short- and long-term sustainable business growth.

MONICA LOPEZ, Vice President Insights, Analytics and Consumer Connections

BARBARA TINGLE, Category Strategy & Insights Manager



Tingle is charged with strengthening retailer partnerships with elevated thought and category leadership. She most recently led a total dairy department custom research project where retailer partners in every channel are executing changes to their total dairy flows and adjacencies per the team's recommendations.

DEAN FOODS

PATH TO PURCHASE
INSTITUTE

SUSAN STEGE, Senior Director, Category & Shopper Insights



Stege has 20 years of experience with the company, most recently leading the shopper insights path to purchase research, now branded as Dean Foods' 3-D Insights. As a result of this work, the team has identified strategies to unlock growth in the dairy case, and specifically milk and cream.

DEL MONTE FOODS

PATH TO PURCHASE
INSTITUTE

SARAH BRACKEN, Senior Manager, Consumer and Shopper Insights



Bracken proactively drives strategic objectives and category growth for the vegetable, broth and tomato businesses. She develops new product innovation and platform pipelines to expand into adjacencies, and is creative and passionate about research design and understanding consumer emotion.

DELL

LORI PENNINGTON, Insights & Shopper Experience Strategist



Pennington is accountable for all marketing mix and ROI that is developed based on the understanding of shopper attitudes and behaviors associated with product acquisition, purchase triggers, touchpoints and where to buy (online or offline). This is designed to build brand equity and drive sales with retailers while the consumer is in shopping mode.

DUNKIN' BRANDS

JOHN SHIPALA, Senior Manager, Global Consumer and Business Insights Group

CHRIS FUQUA, Senior Vice President Marketing, Global Insights and Innovation

DURACELL

PATH TO PURCHASE
INSTITUTE

BRANDON BARR, Director of Retail Marketing & Insights



Barr leads retail marketing, merchandising and shopper insight development in the grocery channel. He is responsible for developing shopper insights to create marketing programs and promotions that enhance the consumer in-store experience and drive growth.

EDGEWELL PERSONAL CARE

PATH TO PURCHASE
INSTITUTE

JULIE CHRISTIDES, Senior Manager, Category & Shopper Insights

FAMILY DOLLAR

PATH TO PURCHASE
INSTITUTE

CAROLYN KUTZ, Director, Merchandising Strategy & Analytics

FLOWERS FOODS

MARY RAZMINAS, Vice President, Business Analysis & Insights

GENERAL MILLS

PATH TO PURCHASE
INSTITUTE

SARA ASHMAN, Global Consumer Insights Senior Manager

RICK KRICHMAR, Senior Shopper Insights Manager

GEORGIA-PACIFIC

PATH TO PURCHASE
INSTITUTE

SHERRY HONEYMAN, Senior Shopper Knowledge Manager



Honeyman is passionate about researching the 95% of subconscious shopper behavior, delivering insight into what the company's most valued shoppers want before they know they want it.

JOHN PFALZGRAF, Director, Consumer Knowledge



Pfalzgraf leads the development and activation of consumer insights for Georgia-Pacific to help guide the company's innovation and go-to-market strategies and programs.

GLAXOSMITHKLINE

PATH TO PURCHASE
INSTITUTE

JULIE CRAIG, Shopper Insights Manager, Pain, Skin and Respiratory Health

Craig has worked in consumer and shopper insights for nearly 10 years across multiple industries, and also has experience in sales, analytics and customer strategy. She has been with the company since 2016, currently supporting the pain, skin and respiratory health teams.

KIMBERLY HUNTER, Shopper Insights Manager, Oral Health



Hunter has nearly 10 years of experience in the CPG industry, holding various roles in category development, sales, trade marketing and shopper insights. She has been with the company since 2017 and is looking forward to utilizing the company's Shopper Science Lab in Warren, New Jersey, for upcoming research projects in oral health.

STEVE LORD, Shopper Insights Manager, Smoker's Health and Digestive Health



Lord has more than 20 years of CPG industry experience with a background in sales, customer strategy, category management and shopper insights. He joined the company in 2015 and currently supports the smoker's health and digestive health teams.

DEB MONAHAN, Team Lead, Global Shopper Insights & Capabilities



Monahan has more than 20 years of CPG experience focused on consumer and shopper insights in both global and U.S. roles. She has been with the company since 2004 and is currently leading the shopper insights and capabilities function. She also oversees shopper and customer research in the state-of-the-art Shopper Science Lab.

GODIVA

JUDITH RUBIN, Global Head of Consumer Insights

H

HANESBRANDS

DIANE PHILYAW, Director, Business Intelligence/Data

HASBRO

MATT PUTNAM, Senior Director, Retail & Shopper Insight

HENKEL

PATH TO PURCHASE
INSTITUTE

MACK HOOPES, Senior Manager, Shopper Insights and Category Development



Hoopes is responsible for the launch support of Henkel hair color and is currently assigned to laundry and home care for the west.

HERSHEY

PATH TO PURCHASE
INSTITUTE

STEPHEN BETTENCOURT, Director of Shopper Insights



Bettencourt manages a team of research experts across the U.S. marketplace who partner with retailers to provide deep shopper insights on motivations and needs, and how that can translate into a competitive advantage for the retailer.

SHELLEY CHRISTIANSON, Senior Manager, Shopper Insights



Christianson is responsible for leading the development of shopper strategies focused on driving growth for key retail partners and the company. Her background also includes formal training and extensive CPG experience in competitive intelligence.

KINDLE PARTICA, Director, Commercial Insights



While heading Hershey's Shopper Insights Center of Excellence, Partica leads foundational and new method approaches to fuel insights and retail solution ideation and to drive the company's new approach to insights-driven performance.

DAVID NOLEN, Senior Director, U.S. Category Strategy & Insights *See profile on page 2*

RACHEL ROGERS, Vice President, Knowledge & Insights

HEWLETT-PACKARD

SHEILA MCKAY, Omnichannel Shopper Insights Manager

IOVATE HEALTH SCIENCES

PATH TO PURCHASE
INSTITUTE

JASON PROWSE, Category & Consumer Insights Manager



Prowse developed and now leads the category management and consumer insights functions for the U.S. and Canada markets, helping retail and e-commerce partners best understand their shoppers and provide robust strategies founded on sound analytics and proven appropriate tactics.

J.M. SMUCKER

PATH TO PURCHASE
INSTITUTE

PORSCHÉ NANCE, Manager, Shopper Insights

ERIKA NELSON, Manager, Shopper Insights

KATRINA WILSON, Senior Manager, Shopper Insights

JOHN B. SANFILIPPO & SON

ARUN RAJAN, Senior Global Director of Consumer and Customer Insights

JOHNSON & JOHNSON

PATH TO PURCHASE
INSTITUTE

LINDA DEVROY, Shopper Insights and Business Intelligence Manager



Devroy is the voice of the Target shopper. She identifies shopper-centered opportunities to grow the company's categories and brands. Her key accomplishment is seeing its sales and shopper marketing teams leverage insights as they develop programs.

JENNIFER FERRAZZA, Senior Manager, Category Insights and Design – Health E



Ferrazza leads the J&J Health E Shopper team, which focuses on baby, first aid and oral care and delivers an insight-informed category vision that provides shopper-centric growth principles and commercial strategy. This enables partnerships with retailers to influence the way shoppers buy and experience the company's categories.

JOSEPH FONTANA, Manager of Shopper Insights & Category Design



Fontana is responsible for shopper insights and category management on the company's baby portfolio including Johnson's Baby, Aveeno Baby and Desitin brands. Leading shopper research and analytics, he provides category insights that drive market strategy and customer executions.

SUZANNE HOCK, Customer Marketing Manager

CHRIS HOLAHAN, Director, Shopper & Category Design

PIA KELLY, Senior Manager, Shopper Marketing & Insights

KEVIN KWIATKOWSKI, Associate Director, Shopper Insights

DEANNA MAESTAS, Senior Director, Global Shopper Marketing – Beauty



Maestas and her team are responsible for shaping the future vision of beauty retail and developing shopper marketing strategies that will transform and grow the global beauty category.

DEBORAH WEARN, Senior Manager, Shopper Insights & Category Design



Wearn leads shopper insights and category design for the beauty business unit. She delivers enterprise strategies to drive category sales, with disproportionate growth for J&J beauty brands like Neutrogena and Aveeno. Her focus on innovative approaches for insight development, with shopper needs and challenges at the center, create new shopper behaviors that drive growth.

TANYA WELIHINDHA, Shopper Insights Manager



Welihindha leads shopper research on the Walmart team for the baby, beauty, oral care and OTC categories. She is passionate about uncovering insights that help cultivate shopper and category solutions.

JOHNSONVILLE SAUSAGE

PATH TO PURCHASE
INSTITUTE

JOE BOURLAND, Director, Strategic Insights & Analytics

K

KAO

PATH TO PURCHASE
INSTITUTE

DIANE ISLER, Senior Manager of Insights & Category Management

KELLOGG

PATH TO PURCHASE
INSTITUTE

CRAIG GEIGER, Senior Manager, Shopper Insights

CHRISTIAN THOMPSON, Senior Director of Shopper Insights



Thompson leads Kellogg's shopper insights organization. His team focuses on understanding shopper behaviors, barriers to purchase and motivations in all channels using primary and secondary research embedded in behavior science. Those insights are then leveraged by sales, category management, shopper marketing and marketing to drive solutions for the company's shopper and retailer partners.

KIMBERLY-CLARK

PATH TO PURCHASE
INSTITUTE

AMY PACIFICO, Global Marketing Research & Analytics, North America Baby & Childcare

KOHL'S

JOSEPH BAGBY, Vice President, Customer Insights & Strategy

KROGER

JEFF TALBOT, Division Vice President of Operations

L

LG ELECTRONICS

PATH TO PURCHASE
INSTITUTE

DOUG LORETTUCCI, Director, Consumer Insights

M

MARS WRIGLEY CONFECTIONERY

PATH TO PURCHASE
INSTITUTE

KATE HOPKINS, Shopper Insights Manager – Consumer and Market Insights (CMI)

CAROL VAN DEN HENDE, Senior Manager, Customer and Marketplace Insights



Van Den Hende is a marketer, strategist and insights professional with more than 20 years of packaged food experience. In her current role, she's led insights development to deliver category stories and innovation pipelines.

MICHELLE WEINRICH, CMI Associate Director, Shopper Insights



With the recent merger between Mars Chocolate North America and Wrigley, Weinrich is heading up the shopper insights team for the newly formed Mars Wrigley Confectionery. The team partners closely with category management to leverage insights from shopper behavior and in-store conditions in order to inspire category learning and strategic growth initiatives for the business.

MARS PETCARE

PATH TO PURCHASE
INSTITUTE

ELLEN GOODEN, Senior Manager, Category & Shopper Insights

AMELIA STROBEL, Global Strategic Insights & Innovation Leader

MASSIMO ZANETTI

PATH TO PURCHASE
INSTITUTE

SUSAN LAMBERT, Director of Shopper Marketing and Customer Insights



Photo by Steve Hockstein

RB: YELENA IDELCHIK, Shopper Insights Team Lead

Yelena Idelchik believes that to excel in shopper insights one must be curious and eager to learn. Those traits have propelled her through a career that began in brand management and grew to include experience in category management, in-store activation, shopper marketing and shopper insights. “I can walk the walk and talk the talk,” Idelchik says.

Her category knowledge includes everything from personal care and fragrances to household cleaners, snacks and vitamins. “Because I’ve worked in all these functions, I can talk to people in their language,” she says. “It makes me more effective overall.”

How do shopper insights fit into your organization?

IDELCHIK: Shopper insights is a starting point for all we do. The team feeds the information and the insights into the planning process from the beginning, so all recommendations and programs are substantiated and tangible. The shopper insights team acts on business priorities by category and then fills in the info gaps with the tangible and actionable facts. We interact across all functions daily – from the brand teams, to trade marketing, shopper marketing, sales and category management.

What are some of the key skills required to excel in shopper insights?

IDELCHIK: The starting point is curiosity and hunger to learn. It is also followed by the ability to synthesize a lot of information (connecting the dots) and the ability to tell a story. We then “code” the information into the language that each function needs – each element of research could be applicable to each function but in a slightly different way. So in a way we are internal and external consultants. The ability to ensure the information is valuable, easy to understand and actionable is what makes the teams come back to us and trust in our work.

How do consumer insights differ from shopper insights?

IDELCHIK: Consumer insights focus on how people consume prod-

ucts at home and become loyal to brands. Such methodologies as brand equity studies, ad copy testing or package/claim design support consumer insights. On the other hand, shopper insights focuses on how people buy in-store and how would we influence their behavior and make their experience easier. In this case, we would focus on defining planogram principles, build new at-shelf education solutions, or define the key drivers of retailer choice within our categories.

Are the two disciplines complementary? If so, how?

IDELCHIK: We have to remember that in many instances, the shopper is a consumer, and if not, they are still linked. As such, we look at ourselves as “cousins.” Some research and reports are very helpful to build general category understanding and both functions use them simultaneously – for example, attitude and usage studies. When we research in-store behaviors, they are still highly critical for our brand and consumer work and are always shared.

How does RB use research to develop shopper insights?

IDELCHIK: We define our research into three levels. The first two are general shopper understanding (foundational studies like path-to-purchase or planogram principles work) and specialized studies that zoom in on a particular business question. An example of this would be a study of one segment or learning about a particular product attribute that can redefine a shopper approach in-store. The third level is the ultimate strategy work that sets us up as true thought leaders – work on category vision, work on a “retailer perceptor” study, and omnichannel education for the future. All work gets shared across the organization and with our customers for the ultimate ongoing engagement. Finally, we monitor category and industry trends via third-party reports on an ongoing basis. We are big fans of Field Agent, WSL, *Drugstore News*, Kantar, Mintel, Euromonitor and, of course, the Path to Purchase Institute.

What emerging technology and techniques do you leverage to develop shopper insights at RB?

IDELCHIK: For the last five years, we have put a lot of value into validating our hypothesis via virtual reality research. We found that validation of planogram options, education, signage and even packaging is highly reliable and impactful. This methodology has given us a lot of measurable conclusions that have resulted in further store test validation or immediate store adaptation, or has fueled further solution development. Mobile research, when structured properly, has delivered very interesting and unique results as well.

Are any recent trends significantly impacting your team's work in insights?

IDELCHIK: The evolution of the omnichannel behavior is one of the top ones. We no longer focus on brick-and-mortar in isolation but weave in the online behavior into every one of our studies. Online influence (from research, to promo and price seeking, to actual shopping) is manifesting itself quite differently across our categories and retailers, and the new white spaces keep us quite busy. To further build on that, the way Millennials shop and research today is starting to reshape the way we approach our business challenges all together.

What recent work by the RB insights team stands out to you?

IDELCHIK: First of all, our insights have to deliver actionable changes in stores. We recently partnered with CVS/pharmacy to help evolve how shoppers educate themselves about the vitamins category. This resulted in us working together to develop new signage and navigation materials that are now in most stores and supporting a very positive sales momentum for the customer. At Kroger, we recommended changes to enhance the pediatric OTC set and make the experience easier for moms – both with the layout and product assortment. Our recommendations were adopted and are being rolled across the chain.

What's the most rewarding aspect of your work?

IDELCHIK: Positive reactions and energy from my team when you provide them the information to both make their work easier and make them look better in front of the customer. The other highly rewarding element is to be able to share the information with the retailer partners and help build the trust for RB. Knowledge is power, and if we can make both our teams and our partners more powerful in the process, it is a win-win. Additionally, it is extremely rewarding to be able to go to a store and actually see the results of your work manifest themselves. Those are the selfie-worthy moments.

What's the biggest challenge facing the insights discipline?

IDELCHIK: The industry is transforming and changing very rapidly – from mergers to new technologies, the behavior shifts quite a bit. As a result, there is a constant need to learn about new trends, methodologies and retailer dynamics, and also keep our teams informed. This has to be done in a very methodical, disciplined and consistent way. Also, the changes are rapid, but we will never fill every info gap. Being choiceful and identifying fewer, bigger, more impactful opportunities will continue to be a priority.

What's next for the insights discipline?

IDELCHIK: This area will never go away. I project that this will become a greater focus for companies in the future. Unless a recommendation is truly substantiated, the risk to execute is high. The most impactful insights, no matter how simple, do not occur overnight and require deep category and shopper knowledge. I also expect that at some point colleges might teach this subject as a course to ensure that their students are exposed to the new angles of business and are prepared early.

MATTEL

PATH TO PURCHASE
INSTITUTE

MEREDITH JANG, Senior Director, Advanced Analytics, Shopper Insights & Marketing

Jang is responsible for turning data into insights and action. This includes driving the vision, strategy and execution of shopper, category and retail research and advanced analytics that deliver business growth for Mattel.

MCCORMICK AND CO.

PATH TO PURCHASE
INSTITUTE

LISA CARPENTER, Director, Category and Shopper Insights

MEIJER

PATH TO PURCHASE
INSTITUTE

JEFF NAULT, Director of Marketing Analytics and Customer Insights

MICHAEL ROSS, Vice President, Digital Shopping & Customer Marketing

Ross leads customer marketing, loyalty, marketing analytics, payment solutions, marketing, digital/mobile marketing strategies and emerging technology for the Grand Rapids, Michigan-based chain.



MONDELEZ INTERNATIONAL

PATH TO PURCHASE
INSTITUTE

HEATHER CROWDER, Associate Director, Strategy and Insights

AMEETA HELD, Director, Global Shopper Insights Center of Excellence

Leading the Global Shopper Insights Center of Excellence, Held focuses on driving organizational capabilities around shopper insights, developing best practice approaches to understand the shopper path to purchase and developing insights around the evolving retail environment and the store of the future.



JESSICA LEVISON, Shopper Insights, North America E-Commerce

NATURE'S BOUNTY

PATH TO PURCHASE
INSTITUTE

CHUCK MEYER-HANOVER, Director of Insights and Analytics, Direct to Consumer

See profile on page 13

KRISTINE UREA, Vice President, Category Management and Shopper Strategy

As a passionate health enthusiast, Urea is excited to lead insight-driven shopper connection that helps make health management easier to navigate. This connection comes to life in the form of informative, yet simple communication to include benefit-led shelf education, inspiring display solutions and targeted shopper communication.



NEWELL BRANDS

PATH TO PURCHASE
INSTITUTE

ROBIN ALEX, Global Director, Shopper Insights

LAUREN GRAY, Senior Manager, Consumer and Market Insights

JONATHAN MILLER, Global Director, Category Strategy and Customer Collaboration

O

O-CEDAR BRANDS

ALEC LENENFELD, Director, Shopper Insights & Category Management



Lenefeld leads a team of dedicated managers responsible for strategic development and executing multiple analytical approaches delivering insights based on shoppers' evolving attitudes, desires, needs and behaviors to identify category opportunities that will benefit both O-Cedar and the retailer.

OCEAN SPRAY CRANBERRIES

LARISSA IRRERA, Director, Global Insights & Strategy



The Ocean Spray Cranberries global insights team integrates consumer, shopper, customer, business and market insights to inform sales and marketing within North America and global partners.

P

PEPSICO

PATH TO PURCHASE
INSTITUTE

AFSHIN AHANGAR, Director, Shopper Behavior, PepsiCo Portfolio, Demand Xcelerator Team



As director of shopper behavior within the company's Demand Xcelerator Shopper Strategy & Insights team, Ahangar partners across U.S. PepsiCo businesses, brands and retail customers to design and deliver PepsiCo's shopper learning agenda.

KOJIS BROWN, Director, Portfolio Strategy and Analytics

ERIK GLEBINSKI, Senior Manager, Shopper Insights

JEFF JONES, Senior Manager, Shopper Insights

MICAH MACK, Consumer Insights Senior Manager



Mack is responsible for providing both consumer- and shopper-based insights into an actionable business strategy that merges meaningful consumer-driven product innovation with emerging and growth channels and customers.

SHANTANU MULAY, Senior Director, Shopper Insights

STEFANIE ROSENBERG, Associate Analyst, Shopper Insights



Rosenberg works across the entire PepsiCo portfolio of brands and top-tier customers to demystify shopper behavior with the ultimate goal of driving loyalty, and unlocking shopper demand at retail.

MAUREEN VANCE, Director, Shopper Innovation

Vance leads shopper innovation, which provides insights on retailers and their shoppers to ensure PepsiCo activates innovation at the optimal, "best-fit" retailers to drive the greatest results with the most engaging tactics.

PFIZER

PATH TO PURCHASE
INSTITUTE

ZACK APKARIAN, Senior Director, Advanced Analytics & Marketplace Insights

JENNIFER HOLAHAN, Director, Shopper and Category Insights to Activation

ELISE MORGAN, Senior Shopper Marketing Manager



Morgan has extensive CPG experience in sales, category management, insights and shopper marketing. She joined the company in 2014 and leverages insights to create personalized, omnichannel health and wellness solutions for the drug shopper.

PINNACLE FOODS

PATH TO PURCHASE
INSTITUTE

HEDDY PARKER DEMARIA, Vice President, Consumer and Customer Insights

See profile on page 5

KAREN ZAPPIA, Director, Customer Insights



Zappia's team converts shopper insights into actions that deliver ROI and profitable growth by embedding shopper into sales practices such as strategic planning, optimizing in-store practices and strengthening customer relationships.

PRESTIGE BRANDS

PATH TO PURCHASE
INSTITUTE

RICH HOLZKOPF, Category Business Manager – Drug



Holzkopf is responsible for creating consumer- and market-based insight stories for national drug accounts. He focuses on brand-specific loyalty insights to help connect retailers with their shoppers.

BRIAN MENDEL, Senior Director of Customer Development

ROCCO RACAMATO, Director, Customer Development/Category Management

KYLE REYNOLDS, Category Business Manager



Reynolds delivers category and consumer insights using IRI Liquid Data, IRI's Price and Trade Advantage tool, Nielsen Assortman and consumer path to purchase data. He enjoys supporting sales for 20 categories across eight departments at Walmart.

PROCTER & GAMBLE

PATH TO PURCHASE
INSTITUTE

LORI AULFINGER, North America Leader, Analytics & Insights



Aulfinger leads shopper insights, business analytics and data strategy for the North America region. Her multi-functional team partners to drive win-win-win solutions for shoppers, retailers and P&G; optimize media and trade choices; and set data strategy for the region and company.

STEPHEN BUCHANAN, Global Leader, Professional Consumer Insights, P&G Professional



Buchanan leads the global B2B/professional consumer and market insights for P&G Professional brands. He is responsible for business professional strategy development and application of professional insights enabling top- and bottom-line growth on a \$1 billion-plus global business.



THE NATURE'S BOUNTY CO.: CHUCK MEYER-HANOVER, Director of Insights and Analytics, Direct to Consumer

Chuck Meyer-Hanover's experience in both consumer and shopper insights gives him a better understanding of the needs of both his internal and external clients. On the internal side he's working with teams such as marketing, merchandising and manufacturing and externally he partners with sales and retailers. "Now that I am in direct to consumer [DTC], I am wearing both the hat of the marketer/manufacturer and the retailer," he says. "I am better prepared to develop research to answer the needs of all my clients."

Having spent many years working in insights for OTC brands that consumers needed to take in response to a health issue – coughs, headaches, heartburn – Meyer-Hanover says it's rewarding to now be on the health and wellness side with vitamins, minerals and supplements.

How do consumer insights fit into The Nature's Bounty Co.?

MEYER-HANOVER: They are at the foundation of everything we do. Learning about our customers, what drives them, how they use products and what they want informs everything from our new product innovation to our marketing campaigns.

What teams are involved?

MEYER-HANOVER: Within the DTC division, I work hand in glove with marketing, merchandising and consumer response in order to bring the voice of the consumer into everything we do.

What are some of the interests of your internal clients?

MEYER-HANOVER: How the new advertising or packaging is received by consumers. They want to know the level of brand and ad awareness.

And external?

MEYER-HANOVER: Where the items should be placed on shelf in-store, and should the products in the category be brand blocked or interlaced with private-label products. Both internal and external clients are interested in the incrementality and cannibalization of new products.

Do you think consumer and shopper insights differ?

MEYER-HANOVER: Very little. The way you gather, analyze and interrupt the data is the same. While not all shoppers are going to consume the product, all consumers are shoppers.

Any areas where they do diverge?

MEYER-HANOVER: Who you consider to be your "client" is the one area that is different. For consumer insights it's your internal colleagues (marketing, R&D, packaging, etc.); for shopper insights it is the sales force and then ultimately the retailer partners. Consumer insights improve the consumer experience and how they use the product, while shopper insights are used to improve the shopper experience with the help of retail partners.

Is there a trend impacting your team's work?

MEYER-HANOVER: The growth in consumers purchasing vitamins, minerals and supplement items online.

What do you see as a challenge facing the insights discipline?

MEYER-HANOVER: Finding the people with the right talent to fill the roles.

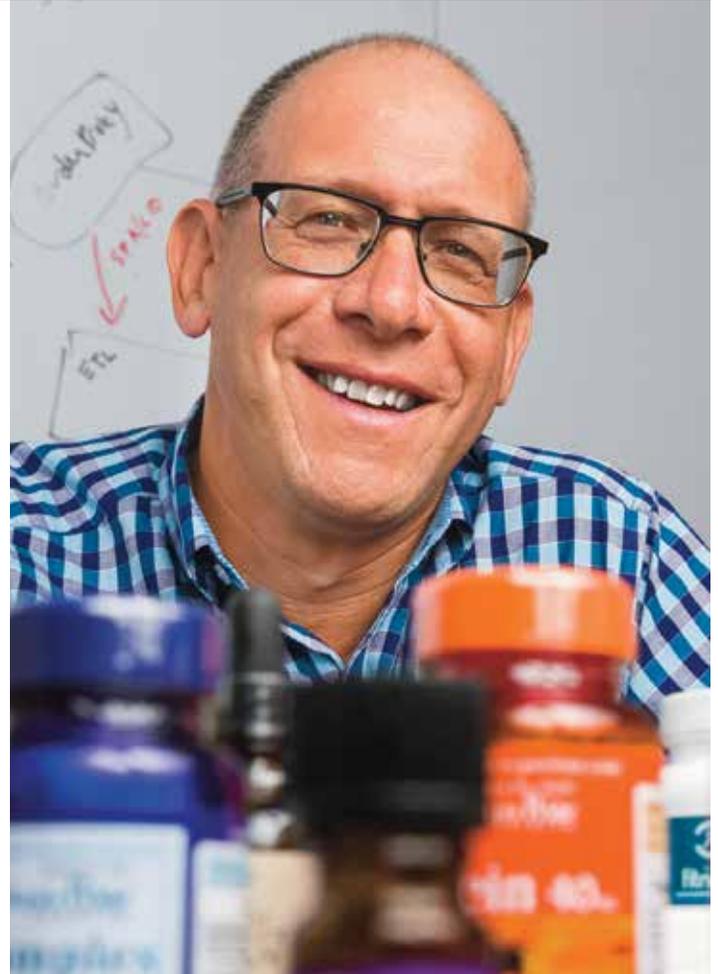


Photo by Steve Hockstein

Please explain.

MEYER-HANOVER: Doing the research is the easy part. It is finding the person who can take the data and turn it into a recommendation for the business and is able to tell a story about the needs of the consumer so management has a clear picture of what needs to be done next. Researchers today need to be storytellers and not just reporters of data.

What are the key skills required to excel in consumer insights?

MEYER-HANOVER: A desire to understand people, what they want and need, as well as how/where they buy and use your product. A willingness to tell your internal clients and management when a tested item needs to be changed or improved prior to launch. Also, to be the voice of the consumer inside the building, and an ability to look at data to identify trends and classify groups of people by preferences or behaviors.

Please share a professional challenge.

MEYER-HANOVER: Every day we deal with challenges, and over my career I have learned to face each one head on and deal with it at that moment.

Anything you've discovered from those times?

MEYER-HANOVER: As I drive home I revisit the situation to determine what I learned and how I can handle the situation next time.

What's on the horizon for the insights discipline?

MEYER-HANOVER: I like to believe that the sky is the limit. Everyone in the company wants to understand the needs of the consumer but needs to balance that with delivering the needs of the company.

CHRISTI GEARY, Associate Director, North America Analytics & Insights – Emerging Retail

Geary builds the business via strategic shopper analytics and insights, insight-based marketing and integrated selling stories across the total North America brand portfolio with specific focus on emerging retailers.



R

RB PATH TO PURCHASE INSTITUTE

YELENA IDELCHIK, Shopper Insights Team Lead

See profile on page 10

REYNOLDS CONSUMER PRODUCTS

NANCY BEDWELL, Vice President, Category Management

BRIAN ELLIS, Senior Category Development Manager

RICH PRODUCTS

JEANNIE JONES, Shopper Insights Manager

Jones leads shopper insights and analytics to bring actionable shopper-focused solutions to Rich's Farm Rich and SeaPak consumers.



RITE AID

ROB GEORGE, Director of Market Research

George analyzes both current and potential customers to determine the best locations for the retailer's outlets. His team then uses customer behavioral data to determine the best use of its space for the customer living around the location.



TOM TROUNCE, Vice President of Customer Loyalty

S

SAMSUNG ELECTRONICS

KYLE RHODES, Senior Manager, Shopper & Retail Insights

Rhodes is responsible for shopper insights for the company's mobile division. His responsibilities include developing and leading strategic and tactical research to track shopper behavior along the path to purchase, uncovering insights surrounding the smartphone shopping experience to drive Samsung marketing strategies at carriers and retailers throughout the U.S.



SARGENTO FOODS PATH TO PURCHASE INSTITUTE

KATHARINE RICHARDS, Director, Insights

SCHWAN'S

DIANE HARPER, Vice President, Consumer Insights & Analytics

STARBUCKS PATH TO PURCHASE INSTITUTE

PAM GREER, Senior Vice President, Global Strategy Insights and Analytics

SUN PRODUCTS PATH TO PURCHASE INSTITUTE

JENNIFER FOWLER, Senior Manager, Retail & Shopper Insight

T

TARGET PATH TO PURCHASE INSTITUTE

MARK VON OVEN, Vice President, Data & Analytics

TYSON FOODS PATH TO PURCHASE INSTITUTE

JENNIFER BENTZ, Senior Vice President, Insights & Innovation

U

UBISOFT

LINDA MURPHY, Associate Director, Retail Marketing & Insights

UNILEVER PATH TO PURCHASE INSTITUTE

MARIANA MALUF, Africa Lead – Market Insights Center of Excellence

ALLISON SCOTT, Director, Shopping & E-Commerce Insights

V

VF CORP.

KENT BASSETT, Vice President, Consumer & Shopper Insights

VITAMIX

SCOTT HACKMAN, Director, Business Insights

W

WALGREENS PATH TO PURCHASE INSTITUTE

MIKE CALLERO, Director, Consumer Insights

Callero is responsible for understanding customer needs, attitudes and motivations across all Walgreens properties. This includes understanding how best to drive more customer traffic and how to make the experience with Walgreens stand out.



WALMART

HEIKO SCHAFER, Senior Director, Global Customer Insights & Analytics

Schafer leads the customer insights & analytics team for Walmart U.S. merchandising across stores and e-commerce. His team drives business results by guiding merchandising and category marketing strategy and informing customer-centric decisions about the selection, pricing and presentation of Walmart's assortment in stores and online.



LINDA VYTLACIL, Vice President, Retail Data Science – Walmart Labs

Vytlacil leads development of systems of intelligence and action to create unique insights about the Walmart shopper and to automate decisions at scale that improve customers' experience with its brands across all channels.



WHIRLPOOL

COLETTE MATTHEWS, Director, Global Innovation & Strategy

WORLD KITCHEN PATH TO PURCHASE INSTITUTE

EMILY VASBINDER, Senior Manager, Shopper Insights