



THE 2021

Holiday Report

FOR CPG PROFESSIONALS

Deck Those Aisles (and Product Pages)

It's the most wonderful time of the year. For kids, families, and, well, companies. After all, the holidays spur so *much* consumer spending, whether through gift-giving or social get-togethers. Indeed, *eMarketer* has forecasted U.S. holiday retail sales to grow by 2.7% to \$1.093 trillion in 2021. That's trillion with a "t."

But, let's face it, brands and retailers are also dealing with a massive amount of uncertainty this holiday season. From the Delta strain to labor shortages, lagging supply chains to spiking inflation, companies face many questions and challenges as they enter the 2021 holidays.

One thing's certain: Preparation will go a long ways this holiday season.

So Field Agent prepared "The 2021 Holiday Report for CPG Professionals" to help brands make-ready for the all-important opportunities (and challenges) that await them this year. On the pages to come, you'll discover...

- **Holiday shopping and spending insights from surveys with over 2,000 holiday shoppers**
- **Best practices used by a panel of CPG professionals, with hundreds of holiday shopping seasons to their names, collectively**
- **Useful tools to help your brand win more sales this holiday season**

So as retailers begin decking their aisles (and product pages), leave nothing to chance—especially this year. The stakes are too high; the uncertainties are too great.

Let the insights, best practices, and tools to follow be a guide.





HOLIDAY INSIGHTS

Shoppers aren't clairvoyant about their holiday shopping and spending, *especially* this year.

Yet, it's always a good idea to get a pulse on shoppers—their attitudes, plans, and expectations—prior to a major selling season. And it doesn't get any more “major” than the holidays.

So turn the page to see results from our survey of 1,250 households...and get acquainted with this year's holiday shopper.



2021 Holiday Spending

Holiday spending encompasses the **3 Gs of gifts, groceries, and get-togethers**. Our survey of 1,250 households*, all of which observe Christmas at least in part by giving gifts, found a fairly even split between households that plan to spend more on gifts (28%) and those that plan to spend less on gifts (24%) this holiday season compared to 2020. Yet 18% answered only “a little more” and 14% only “a little less.”

But holiday spending isn't just about the gifts. And, let's face it, households are going to buy gifts—pandemic or not.

So, if you're looking for drastic changes in spending patterns between 2020 and 2021, maybe fix your attention first on

groceries. After all, last year, COVID-19 stifled a whole lot of would-be family gatherings and holiday parties.

Among the shoppers we surveyed, 34% said they'd spend more—21% only “a little more”—on holiday groceries in 2021 versus last year. 19% expect to spend less.

Yet, those who plan to attend/host more holiday events with people outside their household this holiday season (33%) only modestly outnumbered those who plan to attend/host fewer such events (27%).

The spending “ball” could probably bounce either way this year—toward more or less spending. Much will depend on COVID, inflation, and other dynamics.

*All survey respondents were U.S. adults at least 18 years of age and Field Agent app-users. The survey was executed exclusively through the Field Agent platform, September 1, 2021. Demos for the sample of 1,250: Gender - Female (74%), Male (26%), Age - 18-34 (40%), 35-44 (34%), 45-54 (17%), 55+ (9%); Household Income - < \$35K (20%), \$35-49K (16%), \$50-74K (20%), \$75-99K (15%), \$100K+ (20%), prefer not to say (9%). To make the sample more representative of the gen pop, Field Agent weighted the data by race, as follows: Race - Caucasian (63%), Latino/Hispanic (17%), African American (14%), Other (6%).



28%

Expect to spend *more* on
Christmas GIFTS this year
compared to last year

24%

Expect to spend *less* on
Christmas GIFTS this year
compared to last year

34%

Expect to spend *more* on
holiday GROCERIES
compared to last year

19%

Expect to spend *less* on
holiday GROCERIES
compared to last year

33%

Expect to attend/host *more*
holiday EVENTS with people
outside the household

27%

Expect to attend/host *fewer*
holiday EVENTS with people
outside the household

N = 1,250 HOUSEHOLDS THAT OBSERVE
CHRISTMAS AT LEAST IN PART BY GIVING GIFTS

The Biggest Change YOY

The more things change, the more they stay the same. Clearly, there are some notable similarities between the holidays last year and this year. Most prominently, the specter of COVID continues to loom, though now in the form of new strains. And yet, this year, we're dealing with some entirely new questions and challenges—inflation and labor shortages, among others.

So this got us thinking: What will be the biggest change—on the shopper side—from the holidays in 2020 to the holidays in 2021? We put this very question to 1,250 holiday shoppers, and below we present the top themes along with a representative quote.

Clearly, shoppers are torn on whether 2021 means less or more spending, less or more family time, and less or more in-store shopping.

In the Shopper's Words:

More Spending

"There is more financial stability this year in my household than last year, so the holiday spending will likely go up as a result."

Less Spending

"Less money to spend on gifts. Everything else is so expensive this year."

More Online Shopping

"I most likely will do more ordering online for store pickup with Covid getting bad again."

More In-Store Shopping

"I will shop a little bit more in store as opposed to last year. I did not leave my house much last year."

Less Family Time

"We will be doing less [shopping] since we will not be celebrating with family or friends."

More Family Time

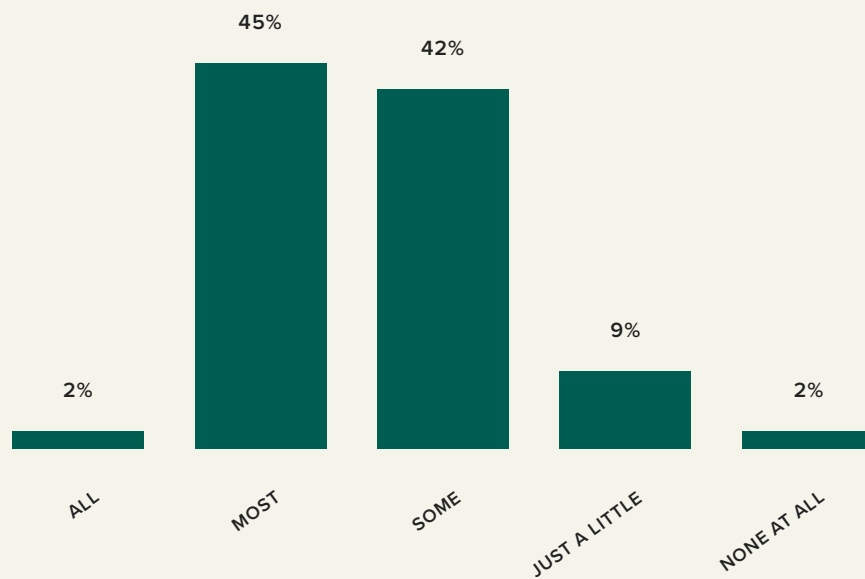
"My immediate family is all vaccinated so we may actually be able to celebrate Christmas together, unlike last year."

More Traveling

"This year we are going to attend family gatherings and travel. Last year we did not."

Online Shopping

Of all the gifts your household will buy in 2021,
how much will be purchased *online/in-app*?

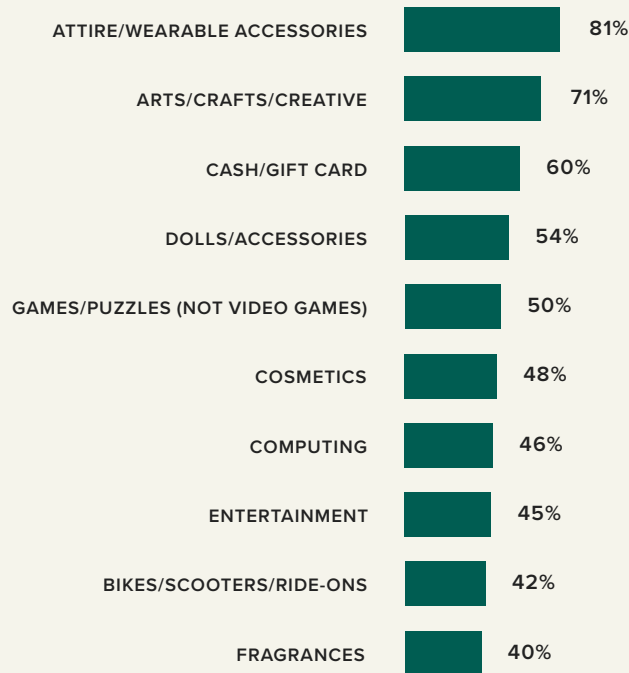


N = 1,250 HOUSEHOLDS THAT OBSERVE CHRISTMAS
AT LEAST IN PART BY GIVING GIFTS



Top Kid Gifts

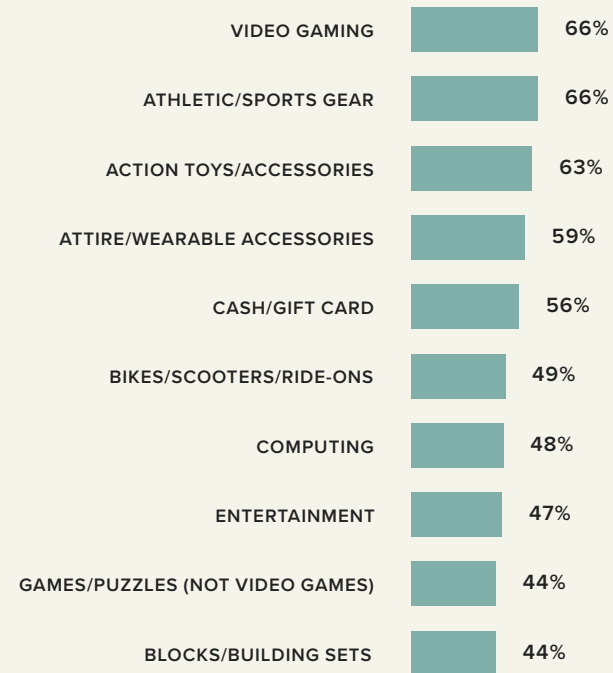
Which of the following gifts are your *girls* likely to receive for Christmas this year?



Athletic/sports gear (39%), Audio/music (36%), Video gaming (35%), Action toys/accessories (34%), Smartphone/mobile (30%), Blocks/building sets (28%), Outdoor play (e.g., trampoline; 28%); Musical instrument/toys (26%); Indoor playset (e.g., mini kitchen; 24%); Collectible items (20%); TV (18%); Remote control (e.g., drones; 14%)

N = 534 HOUSEHOLDS WITH GIRLS BETWEEN THE AGES OF 2-17

Which of the following gifts are your *boys* likely to receive for Christmas this year?

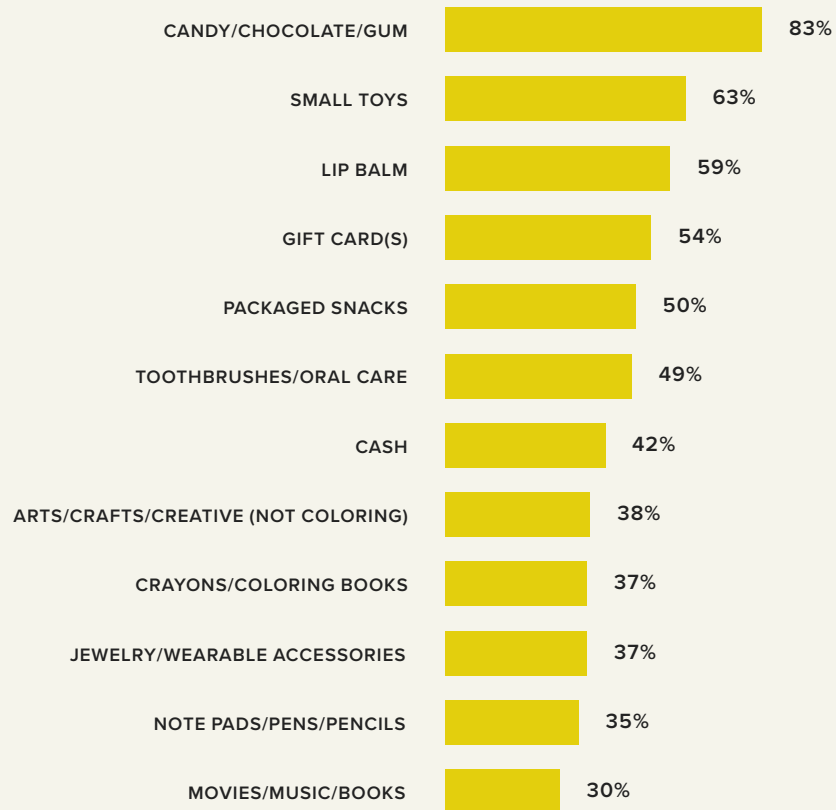


Arts/crafts/creative (39%); Remote control (e.g., drones; 38%); Audio/music (35%); Collectible items (32%); Outdoor play (e.g., trampolines; 31%); Smartphone/mobile (27%); Musical instrument/toys (25%); Cologne (20%); TV (16%); Indoor playset (e.g., mini kitchen; 12%)

N = 532 HOUSEHOLDS WITH BOYS BETWEEN THE AGES OF 2-17

Top Stocking Stuffers

What will you fill your family's stockings with this Christmas?

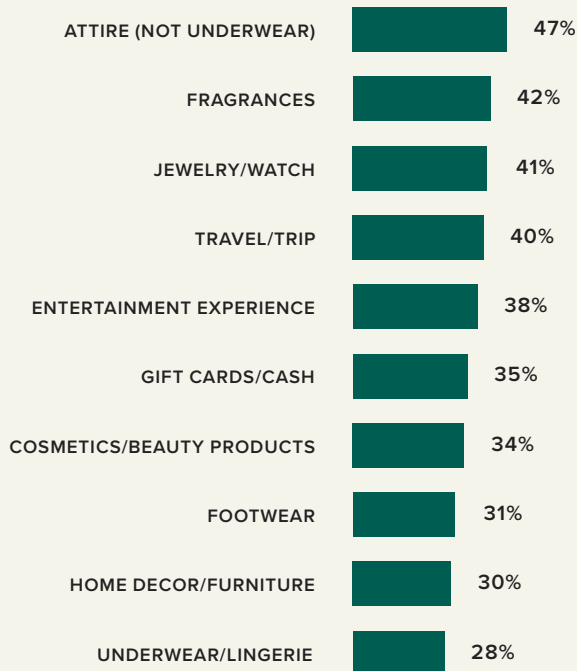


*N = 710 HOUSEHOLDS WITH KIDS BETWEEN 2-12 WHO
PLAN TO STUFF STOCKINGS THIS CHRISTMAS*



Top Spouse Gifts

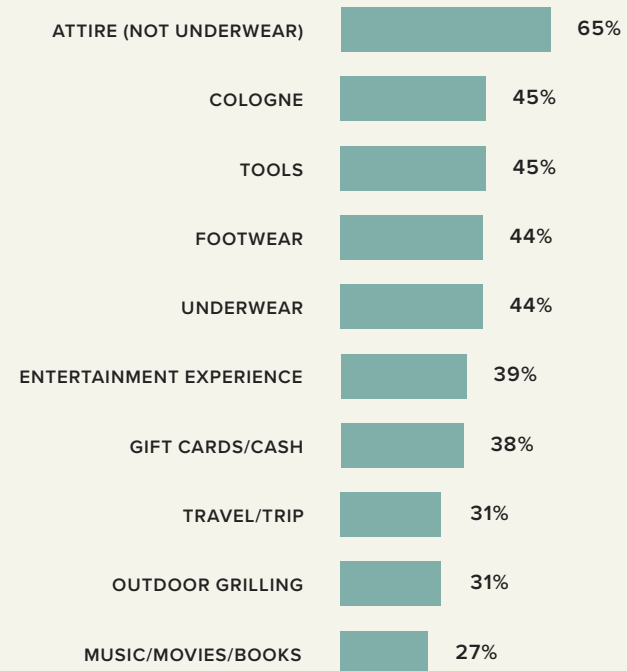
Which of the following gifts is your *wife* likely to receive this year?



Music/movies/books (25%), Kitchen appliances (24%), Smartwatch/wearable tech (19%), Computer (15%), Smartphone (15%), Smart speaker (14%), TV (13%), Camera (12%), Non-kitchen home appliances (10%), Auto products (not automobiles; 9%), Firearms/hunting equipment (8%); Camping/outdoor equipment (8%), Outdoor grilling (7%), Tools (6%)

N = 189 RESPONDENTS WITH A WIFE

Which of the following gifts is your *husband* likely to receive this year?



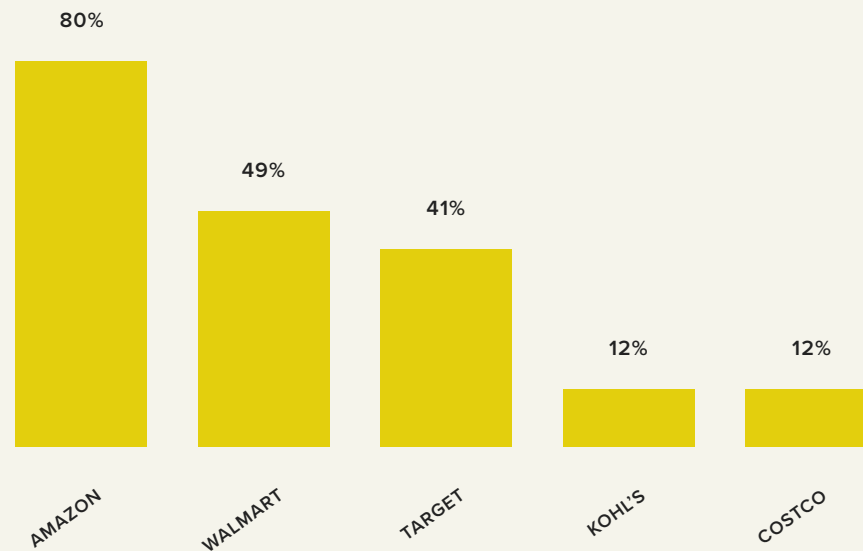
Camping/outdoor equipment (21%), Auto products (not automobiles; 20%), Jewelry/watch (Not smartwatches; 20%), Smart Speaker (18%), Firearms/hunting equipment (17%), Smartwatch/wearable tech (17%), Electric razor (17%), Smartphone (17%), Computer (17%), Kitchen appliances (14%), Home decor/furniture (13%), TV (13%), Camera (10%), Non-kitchen home appliances (5%)

N = 543 RESPONDENTS WITH A HUSBAND



Top Gift Retailers

From which retailers will you purchase most of your holiday gifts this year? Choose up to 3.



Bath & Body Works (11%), Best Buy (10%), T.J. Maxx (9%), Sam's Club (7%), Macy's (6%), Dollar Tree (5%), Apple Store (4%), Barnes & Noble (4%), Dollar General (4%), J.C. Penney (4%), Bed, Bath, & Beyond (4%), GameStop (3%), Lowe's (3%), The Home Depot (3%), Academy Sporting Goods (2%), Dick's Sporting Goods (2%)

31%

Will shop in stores
more this year

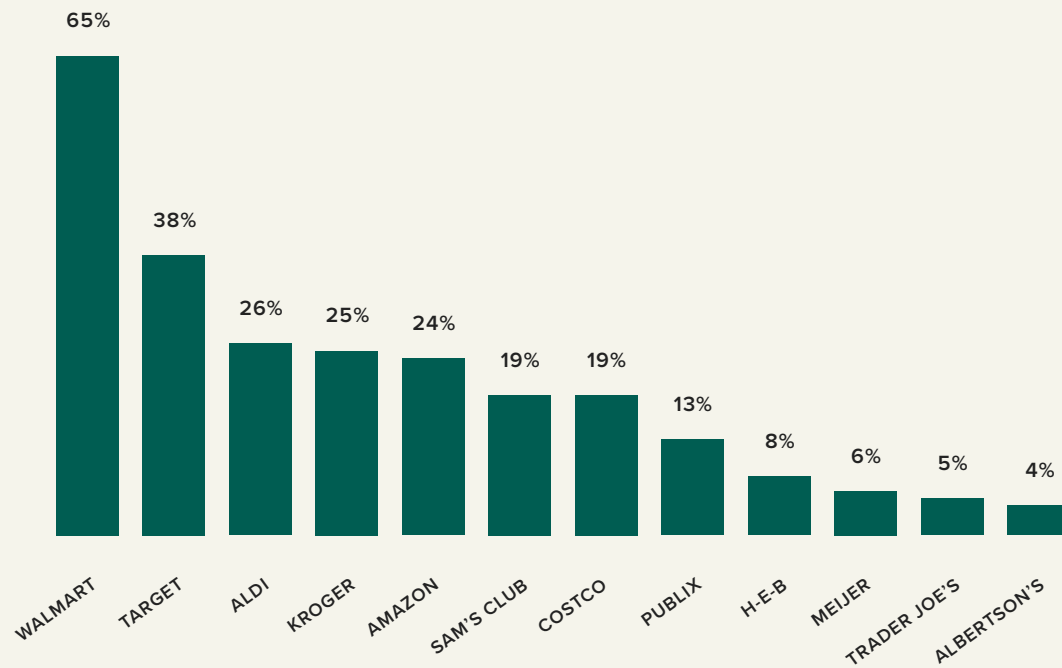
9%

Will shop in stores
less this year

*N = 983 RESPONDENTS (IN A SEPARATE SURVEY)
WHO WILL MAKE CHRISTMAS PURCHASES IN 2021*

Top Holiday Grocery Retailers

From which retailers will you purchase most of your holiday foods, snacks, and beverages? Choose up to 3.



N = 1,250 HOUSEHOLDS THAT OBSERVE CHRISTMAS
AT LEAST IN PART BY GIVING GIFTS



21%

Will use grocery
pickup *more* this year

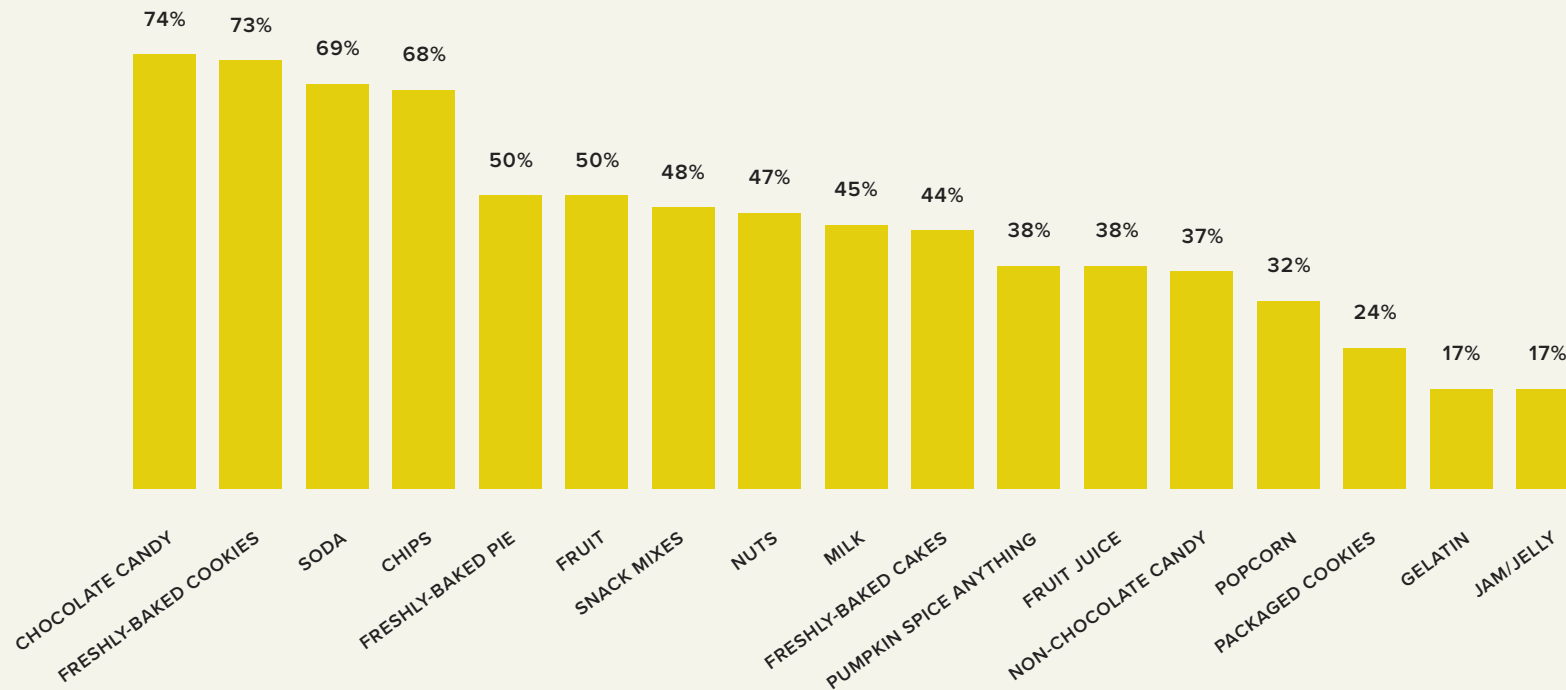
3%

Will use grocery
pickup *less* this year

*N = 983 RESPONDENTS (IN A SEPARATE SURVEY)
WHO WILL MAKE CHRISTMAS PURCHASES IN 2021*

Top Holiday Foods

Which of the following foods/beverages will your household serve on Christmas Eve/Day this year?



*N = 1,250 HOUSEHOLDS THAT OBSERVE CHRISTMAS
AT LEAST IN PART BY GIVING GIFTS*

HOLIDAY BEST PRACTICES

Plato learned from Socrates. Skywalker learned from Kenobi. How fortunate to be able to learn from someone who has already walked your path. Especially if you're a CPG professional facing a topsy-turvy holiday shopping season.

So, to help you navigate Christmas retail this year, we interviewed seven CPG veterans—inside and outside Field Agent—who have already earned their holiday stripes. Now we share some of their advice with you.



The Holiday Success Formula

Just how does a brand win holiday retail?

Maybe there's nothing flashy about the formula below, but, for CPG companies, it's a dependable, time-honored recipe for holiday success...



Inventory, because you can't sell what isn't there.

During the holidays particularly, the ability to “get it in, get it out” counts for so much. But as any brand will tell you, it's not as easy as it sounds. A SKU's journey from manufacturer to (in some cases) wholesaler to backroom to store floor can hit costly snags, especially in a climate of supply chain uncertainty like Q4 2021.

Naturally, different categories have different inventory goals and dynamics during the holidays. For example, seasonal categories like toys and gift-sets usually get to feeling really jolly if they sell-through their inventory. An out-of-stock may even be declared a “win,” as long as it's not too early.

However, evergreen categories, even those that witness a holiday bump

(potato chips, paper towels), manage replenishment as to never see empty shelves or displays.

Space, because it's so scarce in stores, and never more so than during the holiday shopping season.

Throughout the year, brands vie for shelf and display space. We're talking highly valuable, highly competitive real estate here. But around Christmastime, when retailers pack stores with popular gifts, gift sets, seasonal items, and the like, there's even less of this coveted space to go around.

Execution, because operational realities don't always conform to plans, expectations, and agreements.

“No plan survives first contact with the enemy.” Or, in CPG, no plan survives holiday retail. Unfortunately, what happens on sales floors, on-shelf, at pickup curbs, and in backrooms doesn't always go according to plan. Wrong prices, out-of-stocks, missing displays, and other operational problems are all-too-common during the holidays.

Taken together, then, the brand with a firm grasp on inventory, space, and execution is a brand well-positioned for a strong holiday season.

Only, don't be intimidated. This isn't an all-or-nothing game.

As the joke goes, you don't have to outrun the bear, only the guy next to you. When it comes to inventory + space + execution, perfection isn't possible. But a brand doesn't have to be perfect; it just has to be better than its competition.

In interviews with seven longtime CPG professionals—with, collectively, hundreds of holiday seasons to their names—we asked, “What can a brand do to impact its holiday sales?” Most of their responses touched on one or more elements of the holiday success formula, whether inventory, space, or execution.

Notably, their suggestions also fell neatly into two categories: actions CPG professionals can take before the holidays, and actions they can take during the holidays.

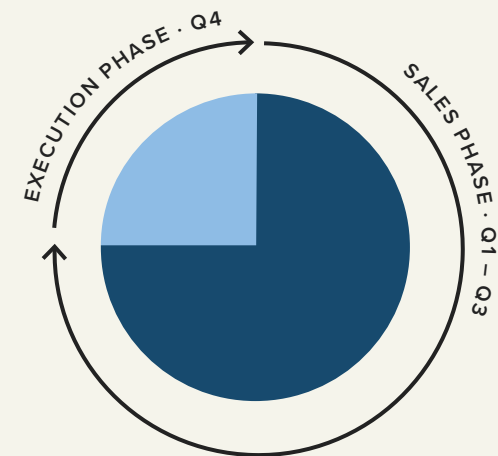
As you can see in the illustration on the right, winning at holiday retail is a matter of winning two distinct phases: the sales phase and the execution phase. In this way, holiday success is a year-round endeavor. But it's an endeavor that relies heavily on making the right moves each and every Q4.

Understand, winning the sales phase often entails collecting data, evidence, and insights during the holidays to support sales in the upcoming year.

Actions taken during the execution phase, however, can impact holiday sales the same year.

Consequently, whether it's holiday sales this year or next year, everything hinges on making the most of the season currently in front of you.

And, on the following pages, that's how we present the advice from our panel of CPG experts. We first present best practices for impacting sales next holiday season (i.e., sales phase support), then we share best practices for impacting sales this holiday season (i.e., execution).



Practices *This Year* to Impact Holiday Sales *Next Year*

1. Win the Space Wars

“Space. The final frontier.” Actually, pretty much the only frontier inside stores.

In brick-and-mortar retail, the name of the game is proximity—being proximal to as many purchase-minded shoppers as possible. Capture more space inside stores—on-shelf, on displays, at entranceways—and you’re going to see more sales.

Period.

This isn’t exactly a secret, however. CPG companies know the essentiality of space to holiday success, and they compete vigorously for it. And as space becomes scarcer, like around Christmas, the fight for it only intensifies.

“The biggest challenge is space,” said one CPG vet interviewed for this report. “Every manufacturer is clamoring for more of it. If you can figure out how to

get more space, you’re going to win Q4.” Big, national brands, with their money, reputation, and sales record, are usually better equipped to wage this all-important fight for space.

But whether you’re a big, multinational brand or a smaller, regional brand, you can win more holiday space next year with a simple yet formidable one-two punch:

a. **Move your product off the shelf and out the door this year.**

Invest your promotional spend wisely in 2021, adding fuel to your holiday sales. As another CPG professional said, “[In Q4, use] a combination of marketing and advertising to boost awareness and in-store activity to entice shoppers...”

b. **Capture data and photos showing demand for your SKUs outstripped supply.**

Now that you’ve generated demand for your goods, be ready to capture data and photos to convince retail buyers you’re worthy of even more space, displays, etc. next year. Maybe, for instance, you can collect photo proof of widespread out-of-stocks.

With innovation in marketing and auditing services, it’s getting easier to land this one-two punch. For instance, as you’ll see in the product guide at the end of this report, you can now enlist shoppers to buy products from specific stores, where you can be waiting in the wings to capture data and photos to demonstrate the higher pull.



2. Hit the Sales Floor Early

Einstein would be proud, wouldn't he? From talking about space to talking about time.

In retail, as in physics, time and space are linked. To enhance holiday sales, your SKUs not only need to be where shoppers are, they need to be *when* shoppers are.

Just as being in more places within a store will improve sales, being there longer will have a similar effect. It's a matter of extending the holiday selling period by getting your brand on-shelf

or on-display as early in the season as possible.

"Christmas comes the same time every year," said another one of our CPG advisors. "The only way to extend the selling period is to get it on display earlier."

As he further explained, the earlier inventory hits the floor, the sooner the retailer will sell through it and need to replenish stock. So, if you generate impulse sales early in the season, the retailer will need to restock closer to the holiday. FTW.

Or, alternatively, they'll run out of stock, and, during the sales phase, you can make a strong case to the buyer for a head start next year.

Here, too, the one-two punch of promotion + data collection will be to your advantage. It's all about showing your buyer they could have sold more units had your brand been on the floor earlier.

3. Just One More Case (Maybe Two)

There's a lot of talk these days about how seemingly small gains make a big difference over time. Just look at the success of "Atomic Habits" by James Clear, who encourages folks to get better by just 1% every day. Small, steady gains can eventually produce major victories.

What's the corollary to holiday retail?

As put by one of the CPG professionals interviewed for this report: "Push in a couple of extra cases." This, he said, is especially true for smaller manufacturers. Imagine the impact of selling one or two additional cases of product to **every store, every holiday season**. Over time, we're talking about a potentially profound impact for your brand.

And while a principle like "just one more case (maybe two)" can yield positive sales results, it also offers CPG professionals a simple, realistic goal to aim at. Unlike aggressive financial goals, which can be intimidating, selling

one or two extra cases per store feels feasible at the gut-level. Small steps to big improvement.

But now we're starting to see a theme, because here, too, selling a couple of extra cases means **making a data-driven argument** for those extra cases to the retail buyer.

You're already well on your way to selling those extra cases next year if, this holiday season, you arm your sales team with data and photos proving demand for your brand outpaced supply in certain stores.

“

Imagine the impact of selling one or two additional cases of product to every store, every holiday season.



4. Record and Analyze

“Game Film”

Football coaches know the importance of recording games. It’s a way to dissect their own team’s performance and to study their competitors’ strategies and players.

Coaches know success on the field starts in the film room. They know the importance of studying the past to influence the future.

CPG companies would do well to follow their example, particularly during the holidays, the Super Bowl of retail competition.

This year, retailers and brands—including your rivals—will be laying it all on the line in stores and online as they compete for holiday dollars.

The question is, will you “set up a camera” to record it, or will you let the opportunity to capture intelligence about your competitors and retail partners go by?

It’s hard to think a year ahead about holiday performance, but if you take steps to capture information, photos, and/or videos of categories, planograms,

prices, and displays this year, you can analyze all of it this “offseason” and, like a good coach, draw up a better game plan next year.

Take a deliberate, opportunistic approach to documenting and analyzing holiday retail this year, and put your brand in a stronger position to win holiday sales for years to come.

5. Help the Retailer Win

Your brand isn't the only company trying to win the holidays. Your retail partners are also desperately striving to grow holiday sales and outperform competitors.

For this report, we interviewed a CPG professional with years of firsthand experience selling specifically to Kroger. “Kroger is placing, perhaps more than any other year, a significant value on the holiday season [in 2021],” he said. “They are working with vendors to develop wholistic marketing plans—in-store, digital, shopper—as well as hot promotional pricing to drive households and trips [and gain] market share.”

In this instance, a brand could help Kroger win by creating and executing a savvy promotional plan, one that buoys both supplier and retailer.

Let's bring it down to the individual level. As described in “The Buyer Meeting Success Kit” by Field Agent, brands win by helping their retail buyers win. After

all, your buyer is responsible for a “store within the store”—the category—and they need to grow category sales as badly as you need to grow brand sales. In both instances, whether we're talking retailers in general or retail buyers individually, you win by helping them win. It's symbiotic.

What are some practical applications of this principle?

First, work hand-in-hand with retailers, via promotional plans, data-sharing, and other vehicles, to make their holiday season—not just your holiday season—the best ever.

Second, during the sales phase, root your proposals in mutually beneficial terms and realities. Consider how the first three practices—win the space wars; hit the sales floor early; just one more case (maybe two)—can be conceptualized and articulated in ways that help both parties win.

Third, we talked a lot about collecting data already. As you learn about your category and shopper, consider sharing your gleanings with your buyer. They're usually eager to learn from your knowledge, particularly if it's objective and data-driven.

Still one more reason to gather intelligence throughout the holidays: to keep up retailer and buyer relations.

Buyer meeting? *No sweat.*



DOWNLOAD THE BUYER
MEETING SUCCESS KIT 

6. Have an “After” Strategy

What comes after the rush of shoppers? It’s easy to overlook, but there are opportunities after the holiday frenzy to consolidate your gains and position your brand for a strong new year.

Consider two concrete examples:

First, during the sales phase leading up to the holidays, develop and negotiate an “exit strategy” with your buyer.

This is especially true if you’re selling gift boxes or specialty items—think, tins of caramel popcorn adorned with Rudolph’s shiny red nose—that don’t have a permanent place on store shelves. For such wares, the buyer will naturally be concerned about not selling through all the inventory. Rudolph doesn’t belong on store shelves in January; neither will the retailer attempt to sell one-year-old popcorn next year—yuck. So what can the retailer do with leftover inventory? Nothing.

In short, the buyer will want to know how you—the brand—will protect the retailer’s margins. At first sight, this is bad news. You’d much rather sell several crates without being on the hook to offer a discount for unsold goods, or—humiliatingly—being forced to pick up unsold goods from stores (two common exit strategy concessions).

But look for the silver lining here. An exit strategy is one more item to negotiate and, more importantly, leverage. For instance, if the buyer seems hesitant to accept your quoted price, consider offering more generous exit terms, particularly if you’re confident in the ability of your items to sell.

Second, don’t overlook or capitulate January.

We know, we know, compared to the holidays, stores in January look like retail deserts. Is that a tumbleweed I see?

“Don’t accept that January is less important,” said one CPG advisor to this report. “It’s a great time to get ahead and set a good pace for the new year.”

He admitted this is somewhat difficult, as brands and retailers alike are always hyper-focused on Q4. But during the sales phase, when negotiating with buyers, don’t neglect the first week in January. Consider a “win-win,” post-holiday deal to propose to your buyer.

Moreover, in January, a lot of merchandising is happening inside stores, including some planogram resets. The first few weeks of the year are, consequently, a crucial time to get your bearings on the new retail environment and get ahead of the competition.

Practices *This* Year to Impact Holiday Sales *This* Year

1. Micromanage the Supply Chain

We all know we shouldn't micromanage people. How many best-selling business books have made this point?

But, according to a couple of CPG vets interviewed for this report, we may need more micromanagement leading up to and during the holidays this year.

Micromanagement of supply chains, that is.

"Hyper focus on your supply chain," said one CPG professional, "and micromanage inventory, orders, and forecasts at every step in the supply chain."

Challenges create opportunities. Disruptions create advantages.

This year, with labor shortages, container shortages, and forecasting uncertainties, the supply chain has plenty of challenges and disruptions to go around.

"The global supply chain is so tangled and disrupted that those who are paying the closest attention and driving the highest urgency are the ones that will outperform," the CPG interviewee said.

Brands that micromanage the supply chain this year could be in-stock when their competitors are out-of-stock.

Talk about impacting holiday sales.

“

The global supply chain is so tangled and disrupted that those who are paying the closest attention and driving the highest urgency are the ones that will outperform.



2. Shift Your Online Ad Spend

It may be an omnichannel world, but there simply isn't enough inventory right now to go around.

Shoppers are currently witnessing high levels of out-of-stocks online, and many retailers are prioritizing stock on shelves over stock at curbsides. Limited inventory, after all, necessitates hard choices.

But staying in-stock in the .com space is a serious matter for brands. Online retailers—Amazon, in particular—can hand out steep penalties to suppliers that don't stay in-stock.

Which brings us to a point about online ad spend.

As one of our CPG interviewees advised, don't simply set and forget your online ad spending, particularly during an unpredictable holiday season like the one ahead. If you're running low on inventory at, for instance, Amazon.com, then shift your ad spend to Walmart.com or another online retailer with plenty of stock.

"Don't waste ad dollars when you may run out of stock on a particular platform," he said. "You are paying the [online retailer] to punish you when you run out of stock!

The name of the game in Q4 is inventory and savvy ad spending."

Especially during times of high demand and supply-chain upheaval, carefully manage the dynamic between online stock levels, OOS penalties, and ad spend. They're linked—and a holistic approach to managing them will keep down costs and improve sales.

And here's a bonus tip: Keep an eye on your competitors' online stock levels. If they're OOS or running low, invest your ad spend there...and reap the rewards. This, according to our CPG contact, is what "smart manufacturers" do.

3. Replenish to the Finish

During the holidays, it's probably too late to influence replenishment for the current year. The sales phase has come and gone; now we're in the execution phase.

But there is one part of the replenishment journey you, as a CPG professional, can impact even late in the season: "the last 100 feet," as it's sometimes called.

In the busyness of the holidays, inventory can sometimes linger in the backroom rather than make its way efficiently to store shelves, endcaps, and displays. In other words, your products were delivered OTIF to the store, but they're not where shoppers can see and buy them. Shame.

"The last 100 feet is so crucial," said one of our CPG interviewees. "You can have

the best program in the world, but it doesn't matter if inventory isn't right."

What can brands do about the last 100 feet? They can assign employees, hire merchandisers, or purchase crowdsourcing services to get product out of the backroom and onto the floor.

Which leads to another principle mentioned by our panel of CPG professionals...





4. Provide Your Own Labor

One CPG veteran summed it up nicely: “Labor is a real problem this year,” he said. “Stores can’t get folks to work. So, you may have to provide your own labor.” Labor for what? Well, for instance...

- Moving product from the backroom to the sales floor
- Cleaning up SKUs on shelves and displays
- Ensuring pricing and display compliance

This holiday season, there’s potential for a “perfect storm” in B&M retail. What if high demand, high traffic, and labor shortages all collide? We’re talking about a scenario with potential for lots of oversight.

Out-of-stocks. Unkempt aisles and shelves. Inaccurate prices. Missing promotions, signage, and displays.

In this environment, harried store managers will, in many cases, welcome with open arms any labor provided by

CPG partners. With benefits to both brand and retailer.

While big brands often have the benefit of professional merchandisers, smaller brands might consider crowdsourcing services like those cited in the product guide at the end of this report.

5. Get Serious About Compliance

The holidays are not the time to hide your eyes from the reality of what's happening in stores. During the sales phase, your team negotiated a program with the retail buyer, including, perhaps, specific pricing and promotional considerations.

But, especially during a wild and woolly holiday season, operational realities don't always match programs as they appear on paper. The most common (and costly) offenders are perhaps prices, displays, and POS materials (analog and digital). In the chaos of holiday retail, it's not uncommon to see, for instance...

- Incorrect prices on SKUs
- Missing or incorrect shelf tags
- Missing displays
- Displays stocked with the wrong product

Yet these were negotiated—in some cases, purchased—by your brand. You have them coming.

Taking quick action against mistakes made by retail partners, which may be isolated to one store or spread across many (if not all), can prevent a catastrophic loss of sales.

But you can't spot compliance issues if you don't look for them, and you can't fix compliance issues if you can't prove them to the retailer.

So, this holiday season, be deliberate. Look for, find, and, working with your retail partner, fix operational problems—before they get out of hand.

“

Taking quick action against mistakes made by retail partners can prevent a catastrophic loss of sales.

HOLIDAY TOOLS

It sounds like something dad would say, but the right tools make all the difference. CPG professionals sometimes don't realize the breadth and depth of tools available to help them win holiday sales. And even when they do, they may not know where to start. Not a problem this year. You can start with this Holiday Product Guide.



The Holiday Product Guide

Ever seen someone pounding a nail with the heel of a shoe? If so, you probably had a thought like, “How much easier this would be with the right tool.”

Holiday retail, too, is easier with the right tools.

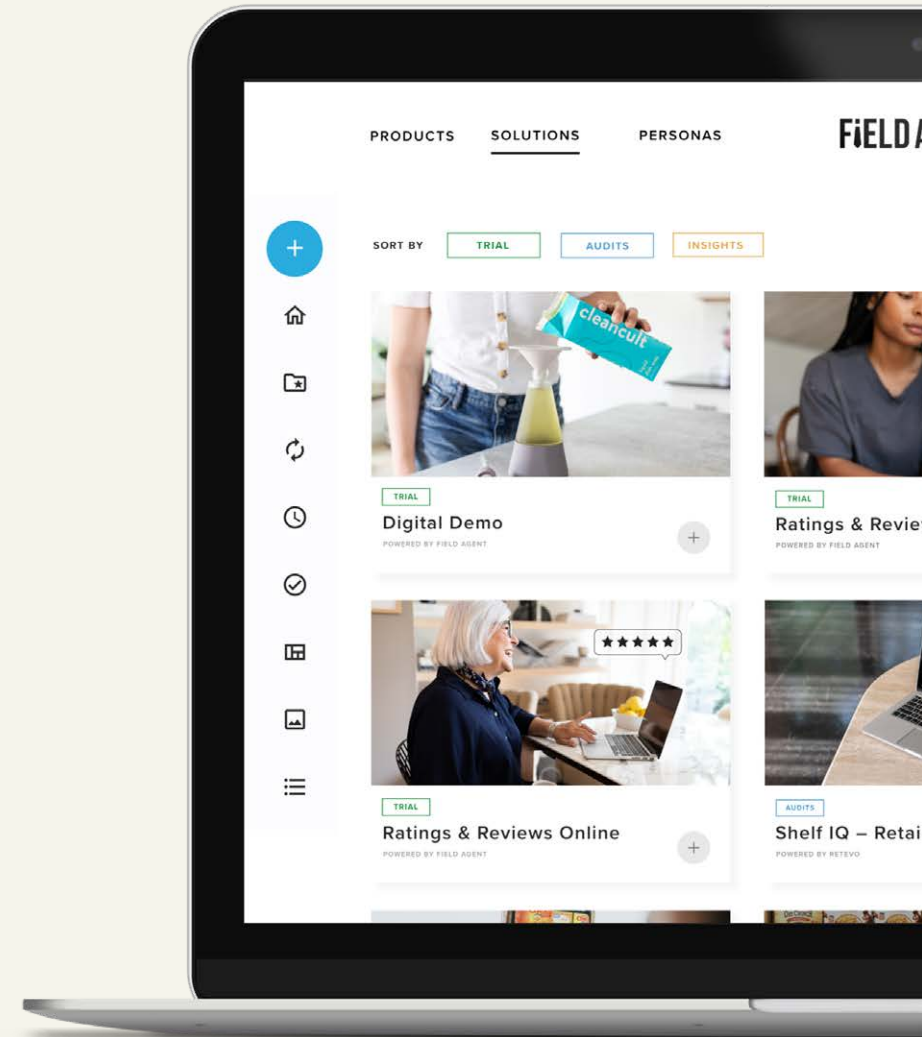
The Field Agent platform, created by CPG professionals for CPG professionals, is designed to give brands the tools they need for holiday success—all in one convenient location.

Our marketplace contains a host of auditing, marketing, insights, and merchandising tools to help CPG companies win during the holidays and throughout the year.

On the coming pages, we offer a Holiday Product Guide to help you quickly locate, learn about, and execute the right tools to wage a successful holiday campaign.

Here's to *your* holiday success.

[EXPLORE THE FIELD AGENT PLATFORM →](#)



This holiday season, I need to...	Explanation	Field Agent Product Recommendations
Check that displays and signage are on the floor and properly executed	Space is everything during the holidays, which is why displays and signage are so important. But understaffed retail partners, in the thick of the holiday frenzy, may not execute your displays or signs properly (or at all). It's wise to protect your investment by checking up on them.	<ul style="list-style-type: none"> ✓ Display Compliance ✓ Signage Audit ✓ Digital Display Ad Compliance ✓ Seasonal Display Execution COMING SOON
Ensure prices on my SKUs are accurate	Shelf tags and displays don't always reflect the right price, a potentially costly error that may be confined to a few stores or widespread over many stores. Ensuring the price is right can be a holiday gamechanger.	<ul style="list-style-type: none"> ✓ Price Check
Locate out-of-stocks and/or low-stocks for my products	An out-of-stock is a tragedy during the holidays—lost sales, frustrated shoppers, perturbed retailers. Particularly in an environment of supply chain uncertainty, it's a good idea to be proactive about looking for, identifying, and fixing OOSs.	<ul style="list-style-type: none"> ✓ On-Shelf Availability
Generate ratings and reviews to drive sales	You're hoping to make a splash online this holiday season. Unfortunately, your product pages contain few to no reviews. Take the initiative on generating reviews, especially when a lot is at stake.	<ul style="list-style-type: none"> ✓ Ratings & Reviews IN-STORE PURCHASE ✓ Ratings & Reviews ONLINE PURCHASE

This holiday season, I need to...	Explanation	Field Agent Product Recommendations
Generate immediate sales in specific stores or markets	For many reasons, brands sometimes “seed” sales in specific markets, at specific stores, or on specific sites/apps. In such cases, brands can enlist shoppers to purchase their products—where it matters most.	<ul style="list-style-type: none"> ✓ Buy & Try ✓ Digital Demo ✓ Ratings & Reviews IN-STORE PURCHASE ✓ Ratings & Reviews ONLINE PURCHASE
Check up on a single item to ensure proper in-store execution	Maybe a lot is riding on one of your SKUs this holiday season. It’s a good idea, then, to check up on it, including its on-shelf availability, price tags, shelf positioning, etc.	<ul style="list-style-type: none"> ✓ Item Checkup
Restock shelves with inventory from the backroom	Are your SKUs out-of-stock, but inventory is available in the backroom? The last 100 feet can be a doozy during the holidays. “Provide your own labor” during important selling events, and make sure your product gets from the backroom to the floor.	<ul style="list-style-type: none"> ✓ Shelf Management COMING SOON
Tidy up the inventory on shelves or displays	Shelves and displays can get messy and disorganized during the holidays. A little light merchandising—product rotation, shelf-tag maintenance, inventory assessment—can go a long ways.	<ul style="list-style-type: none"> ✓ Lite Merchandising – Product Care Visit

This holiday season, I need to...	Explanation	Field Agent Product Recommendations
Understand holiday categories, planograms, prices, and competitors	Use this holiday season to win next holiday season. Now is the time to document categories, planograms, and programs, to lay a solid foundation for future holiday success.	<ul style="list-style-type: none"> ✓ Category Overview Photos ✓ Planogram Visibility ✓ Price Check
Find on-shelf merchandising opportunities and problems	Don't leave opportunities and cost-savings on the shelf this year. Commission an analysis of your on-shelf products, then identify ways to improve your holiday performance.	<ul style="list-style-type: none"> ✓ Shelf IQ – Retail Smarter
Understand the attitudes and behaviors of holiday shoppers	Shopping looks different during the holidays. Stores are busier; merchandising and promotions look different; shoppers are driven by different priorities and attitudes. Now's the time to understand the holiday shopper.	<ul style="list-style-type: none"> ✓ Shopalong
Evaluate planograms and categories after the holidays	The post-Q4 is important, too. Lots of merchandising, including planogram resets, happen right after the holidays. It's a smart idea to get your bearings on the new retail environment immediately following Q4.	<ul style="list-style-type: none"> ✓ Category Overview Photos ✓ Planogram Resets

New Products for the Holidays

COMING SOON TO THE FIELD AGENT MARKETPLACE



Seasonal Display Execution

This new product will determine whether your seasonal displays are properly executed in stores. If they aren't, we'll fix them for you!



Seasonal Category Photos

What are your competitors up to this holiday season? Are they lining stores with seasonal displays, signage, and/or other POS materials? This product can show you.



Seasonal Display Photos

Displays drive sales. So, what's going on in your category? This product will capture all displays and signage for a particular category...so you can stay in the know.

YOUR HOLIDAY HELPER

For many CPG companies, as the holidays go, so goes the year. It's why brands hold nothing back in Q4, with special efforts around promotions, displays, demos, merchandising, and more. But how's a company to manage it all, and how's a company to maximize holiday sales?

The Field Agent retail-solutions platform is designed to help companies solve a variety of retail challenges—all in one convenient place. Visit the platform throughout Q4 to launch in-store audits, commission on-demand sales, generate ratings and reviews, collect shopper insights, or to get a hand with your in-store merchandising.

The Field Agent platform is your all-in-one helper for the holidays.

VISIT THE MARKETPLACE →

SCHEDULE A FREE DEMO →

