FOURKITES | CHORUS

The 44% Problem

What your promotion budget is actually buying

A field guide for trade marketing, retail execution and revenue growth leaders who pay for displays their shoppers never see.



Inside This Guide

How much of the in-store display time you pay for actually happens? Most brands can't answer. This guide shows where the money leaks, how it impacts your business, and what it's costing you.

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"Too many brands find out a display never went up from the sales report, after the promotion is over. They should know while there's still time to fix it."

— Matt Elenjickal,
Founder & CEO, FourKites



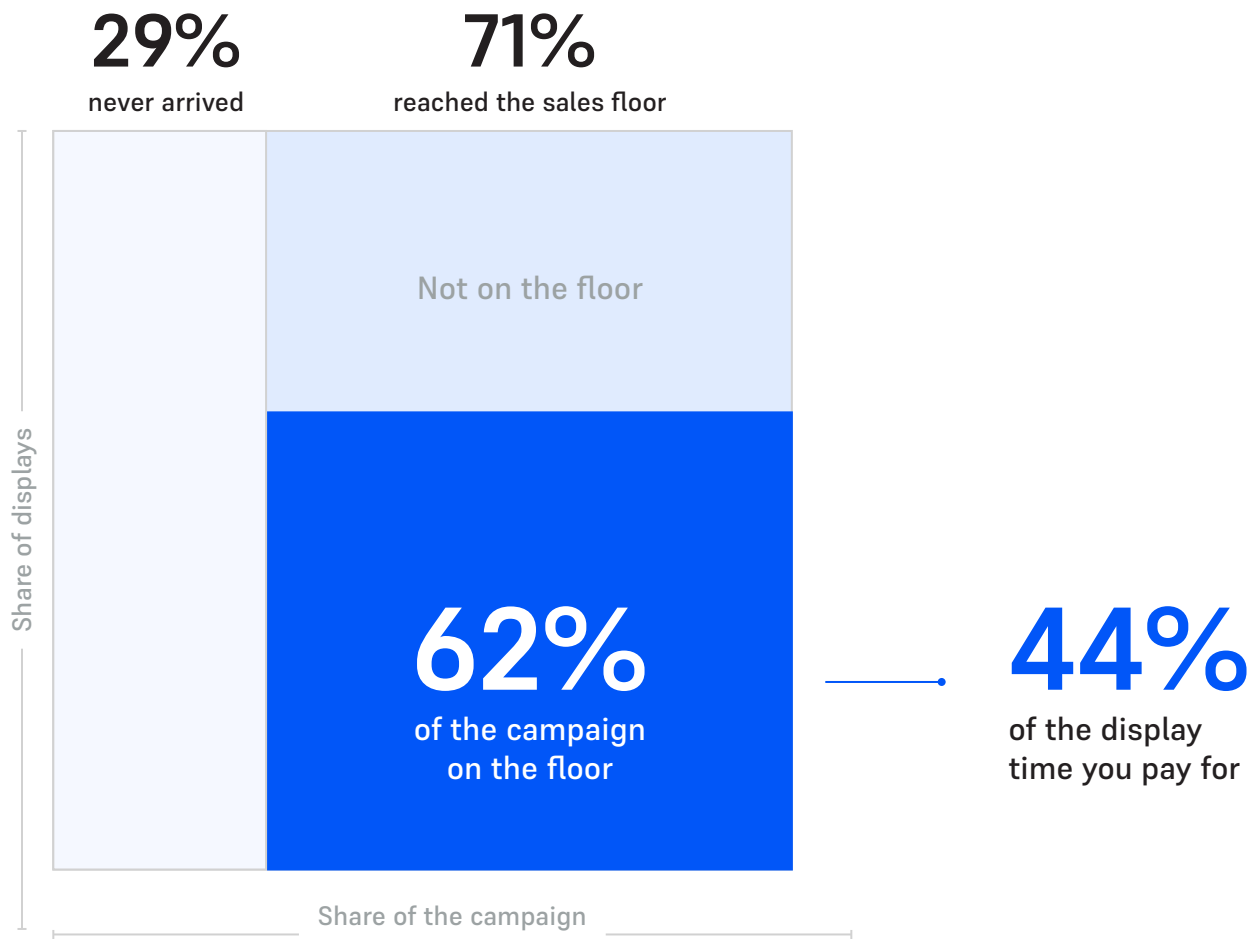
CHAPTER 01

The number few brands can see

44%

Brands get roughly 44% of the display time they pay for. That figure comes from the largest published study of in-store displays, in which researchers at Texas McCombs and Gonzaga used IoT sensor data to track about 15,000 displays across 10 campaigns in nearly 5,000 stores of a Fortune 500 retailer.

What the study found:



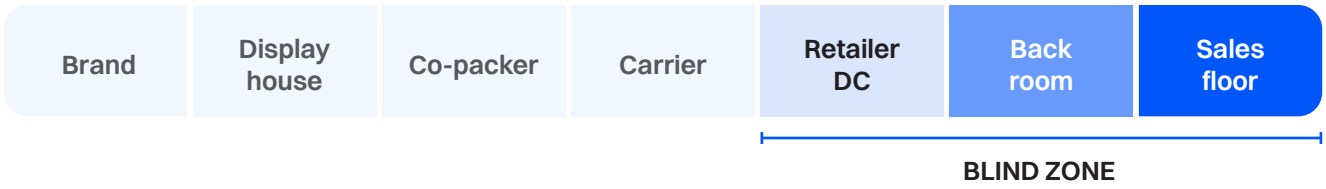
71% of displays reached the sales floor, and those displays were on the floor for an average of 62% of the campaign. Multiplied, that's about 44% of the display time you pay for.

The data was collected from September 2017 to March 2018, and the study was published in 2024. Execution has stayed opaque because measuring it meant costly audits of a sample of stores or sensors in every one.

CHAPTER 01

The last 50 feet

A display passes through seven hands before it earns a dollar. A brand's line of sight usually ends at its own dock or the retailer's DC. The rest of the route, through the DC, the back room and onto the sales floor, is the last 50 feet, and the retailer controls all of it.



Five ways it fails:

Never set	It sits in the back room or never leaves the DC.
Set late	It misses the launch week the whole campaign was timed to.
Pulled early	The back half of the campaign is gone.
Wrong store	It misses its promotion and is rarely recovered.
Never measured	A failed promotion looks the same as a weak one, and next year's plan is built on that mistake.

The study found bigger, more complex displays, and ones that arrived early or on weekends, were the least likely to make it out.

CHAPTER 03

Why the usual fixes fall short

Every brand has tried to close this gap. Each of the usual answers runs into the same wall: the store.

Approach	What it Does	Where it Breaks
Field audits & merchandising crews	People check a sample of stores	Expensive, partial, usually after the window closes
Photo verification	Confirms what a shelf looked like	Tells you about a problem; doesn't fix it
Fixed in-store readers	Hardware in each store detects displays	Slow store-by-store rollout; needs store teams' help

The alternative: plant-to-floor tracking with recovery. It tracks each display and acts while the promo runs.

CHAPTER 04

Worksheet: what it's costing you

Take your annual spend on display programs. Multiply by the share of display time you don't get.

THE FORMULA

Display spend not working = Annual display spend × (1 − floor rate × time on floor)

Using the study's averages (71% reached the floor, for 62% of the campaign, so about 44% works):

Annual Display Program	Working (≈44%)	Not Working (≈56%)
$5M	$2.2M	**$2.8M**
$10M	$4.4M	**$5.6M**
$25M	$11.0M	**$14.0M**

Illustrative only, using one retailer's averages. Your rate could be better or worse. That's the question this guide wants you to answer.

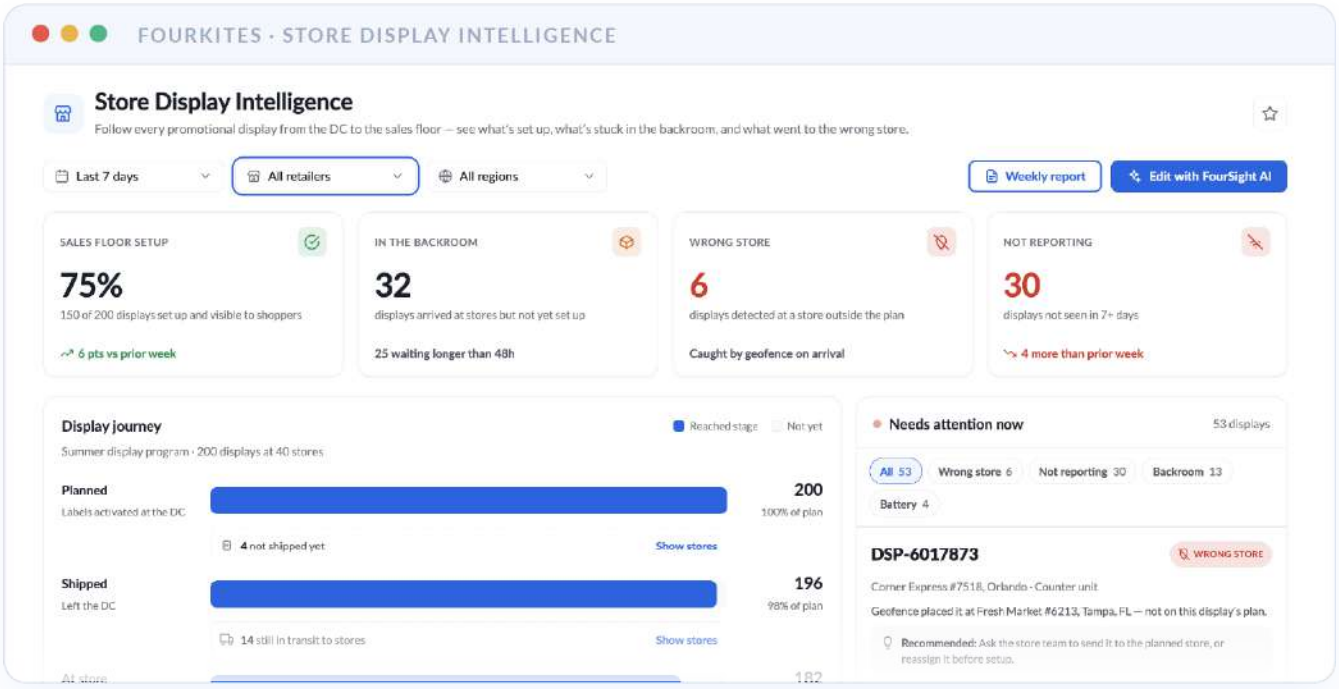
+6.9%

Then add the sales the displays were supposed to drive. The study puts the campaign-week upside from better execution at up to 6.9% of dollar sales on the promoted products.

CHAPTER 05

What good looks like

Closing the gap takes seeing every display from the plant and acting while the promotion is still live, in one view.



One dashboard, plant to shelf: setup rate, the display journey, and the displays that need attention this week.

01

Visible from the plant

The display itself, through the DC, into the store, onto the floor.

02

Nothing installed in the store

No readers, no new tasks for store teams. Works across every retailer.

03

Fixed during the promotion

A stalled or misdelivered display opens a recovery task the same week.

04

Tied to sales

Confirmed floor time lines up with POS, so you see what actually sold.

05

Audit spend drops

Verified execution replaces field audits and third-party checks.

CHAPTER 06

Self-assessment

Score one point for each yes. Be honest — the gaps are where your budget is leaking.

- [ ] I know what share of my last campaign's displays reached the sales floor.
- [ ] I know that number for each retailer, not just overall.
- [ ] I know how long the average display stayed up.
- [ ] I learn about a missing display while the promotion is still running.
- [ ] Someone owns fixing a missing display during the campaign.
- [ ] I can find a display that went to the wrong store.
- [ ] My compliance number comes from measurement, not an estimate or a sample.
- [ ] I can separate a weak promotion from one that was never executed.
- [ ] My trade spend ROI model uses actual floor time.
- [ ] My retailer conversations about compliance are backed by data.

TOTAL:

8–10
You're ahead of nearly everyone.

4–7
You're paying for blind spots.

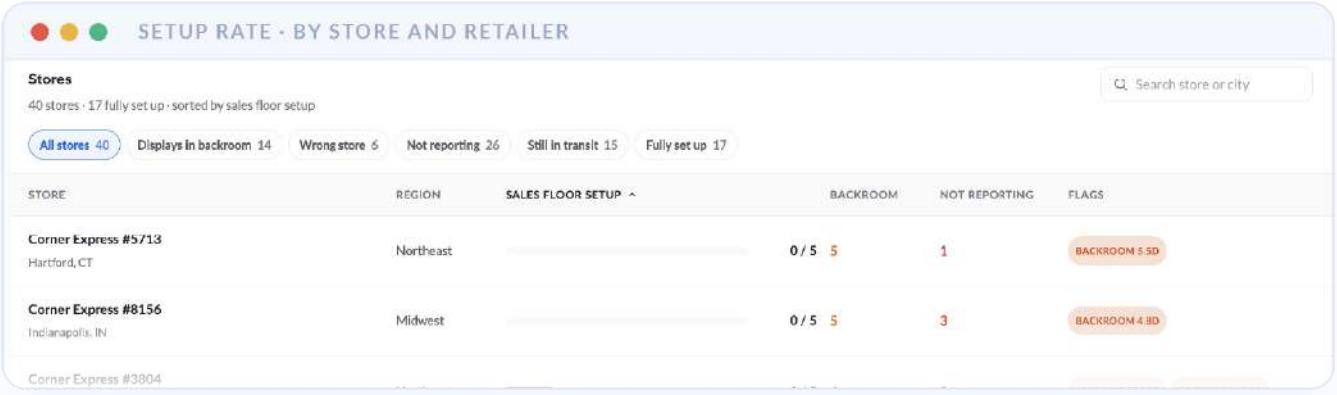
0–3
Risk nobody has priced.

CHAPTER 07

Your first campaign

Start with one campaign. Every week, for every display, you get five reports —down to the individual store:

Report	What it Tells You
Setup rate	Share of displays on the floor, by store and retailer
Back-room dwell	Days each display sat before it went up
Wrong-store deliveries	Displays that landed in the wrong place, and where they are
Recovery log	What was fixed during the campaign, and when
Floor time vs. sales	Confirmed floor days lined up with POS



You're not buying a dashboard. **You're paying for displays on the floor.**

Learn more:
fourkites.ai/store-marketing-intelligence

FOURKITES | CHORUS

About

FourKites runs the AI-powered supply chain platform used by more than 1,600 brands. **Chorus**, an Alphabet X spinout, makes physical goods visible and actionable across every handoff, so each display is tracked from the plant to the shelf, with nothing installed in the store.

Sources

Zeng, Agarwal & Stamatopoulos (2024). Promotional Inventory Displays: An Empirical Analysis Using IoT Data. Manufacturing & Service Operations Management 26(5). Abstract and online appendix.

McCombs School of Business, summary of the study (2024).

Find your own number.

Talk to our team about Store Display Intelligence.