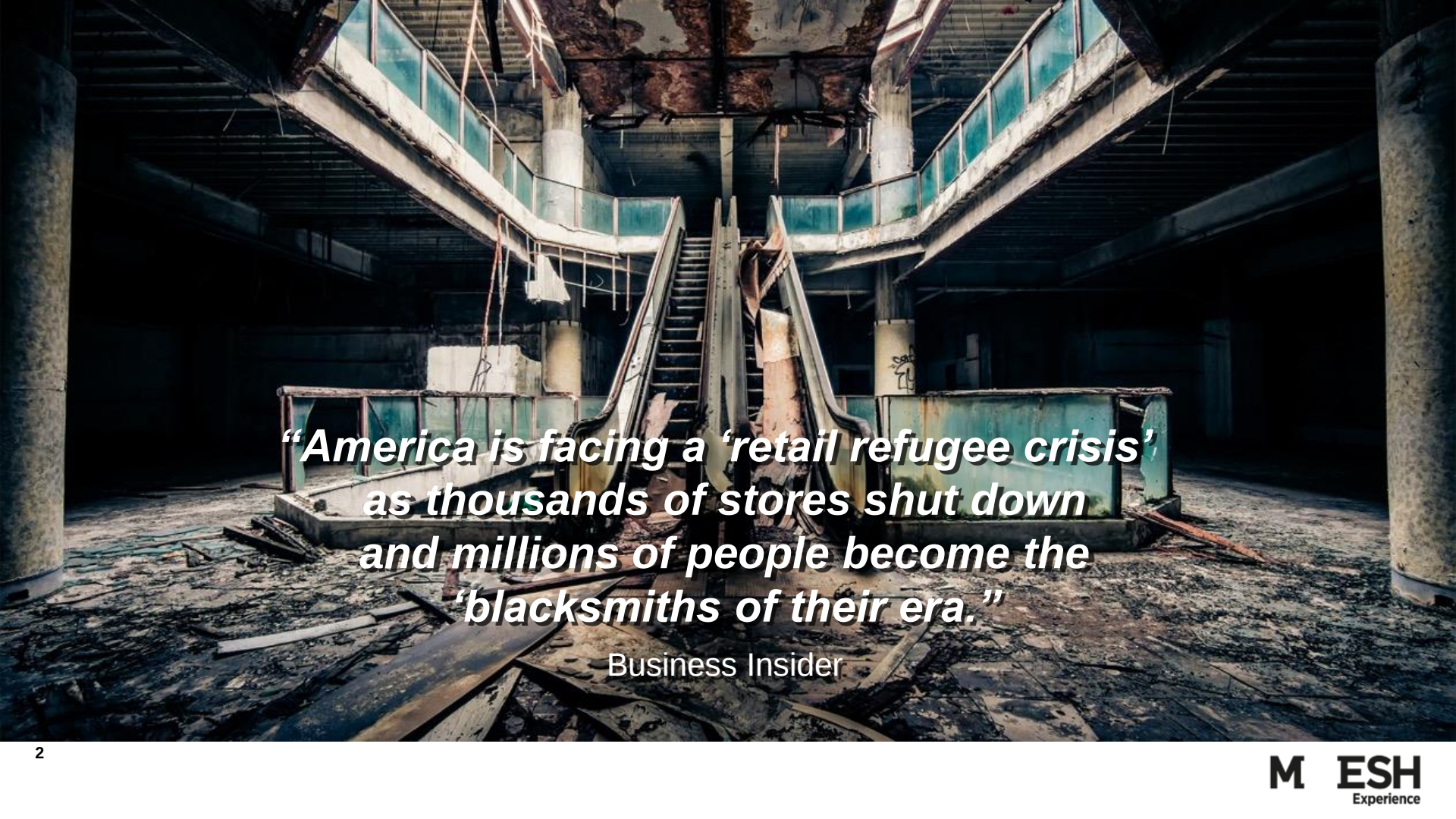




Retail Revolution

How AI is Transforming the Measurement Ecosystem

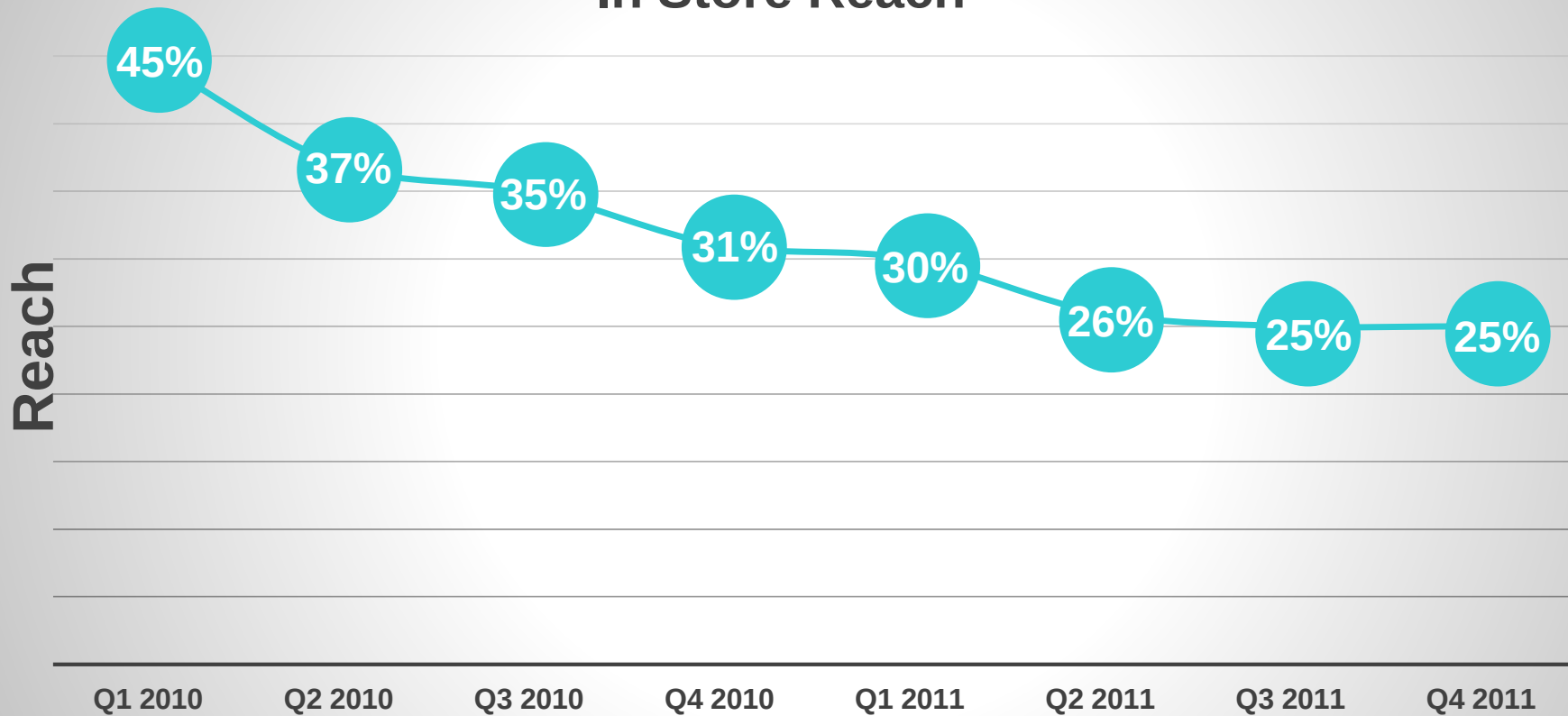
Fleur Evans, MESH Experience
ASC Conference May 2019

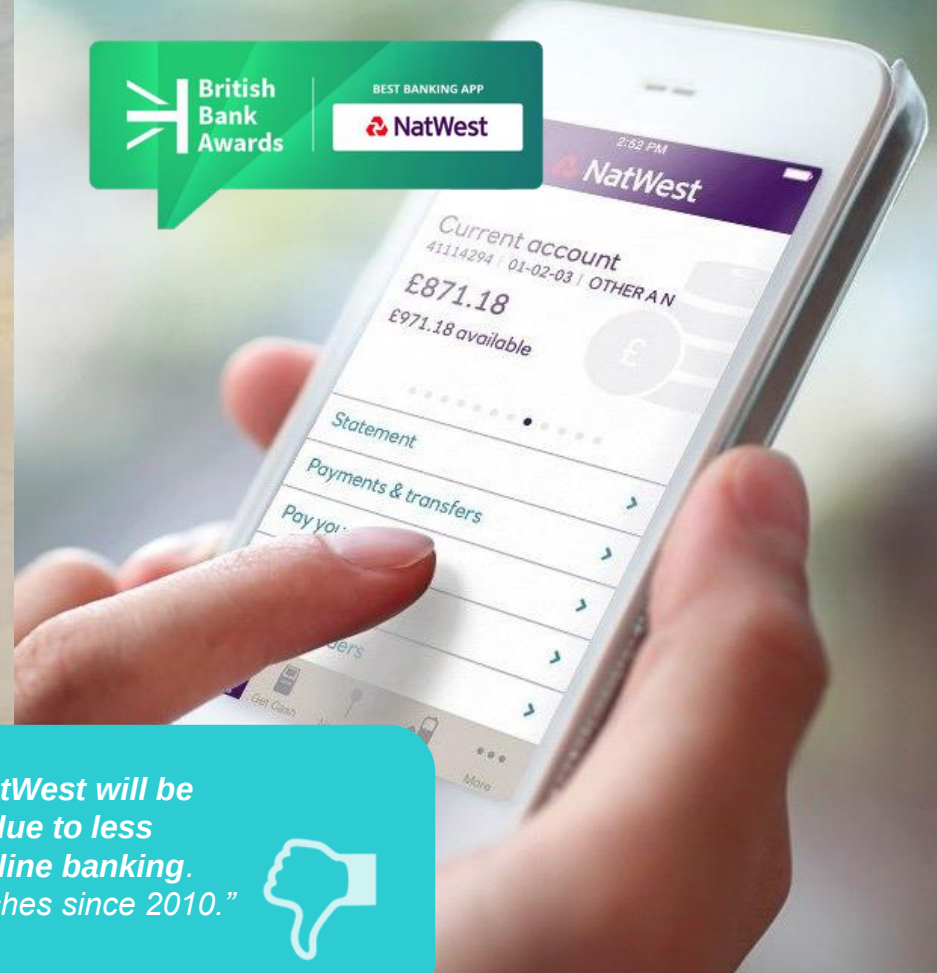
A photograph of a dilapidated, multi-story building interior. The central focus is a staircase with a metal railing, leading up to a second floor. The walls and ceiling are heavily damaged, with exposed concrete and peeling paint. The floor is covered in debris, including broken wood and metal. The lighting is dramatic, with strong shadows and highlights, creating a sense of decay and abandonment.

***“America is facing a ‘retail refugee crisis’
as thousands of stores shut down
and millions of people become the
‘blacksmiths of their era.’”***

Business Insider

In Store Reach





"It was announced on BBC News that NatWest will be closing branches across the country due to less customers visiting and more using online banking. There's been large decline in using branches since 2010."

TV, NatWest, Fairly Negative, No Difference



Hermes: Fall in Love Again



Magnum: Pleasure Store goes premium



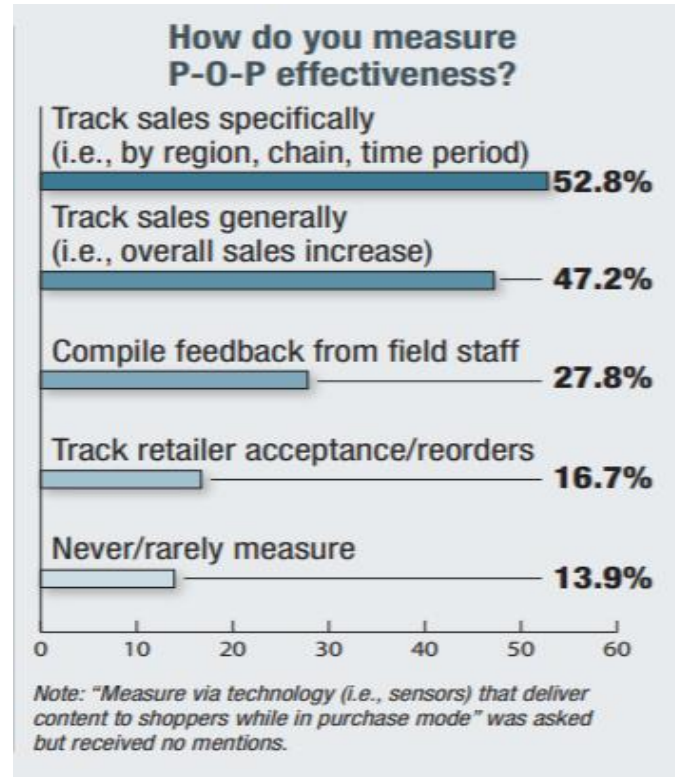
MESH Experience Point of View

MESH believes that for brands to succeed in the new world, marketers need to take an **Experience Driven Marketing approach.**

Experience Model



In research
by The Path
to Purchase
Institute...



not one company
measured
effectiveness
via technology

Retail Measurement Gaps

How to measure displays, pop-ups and events?

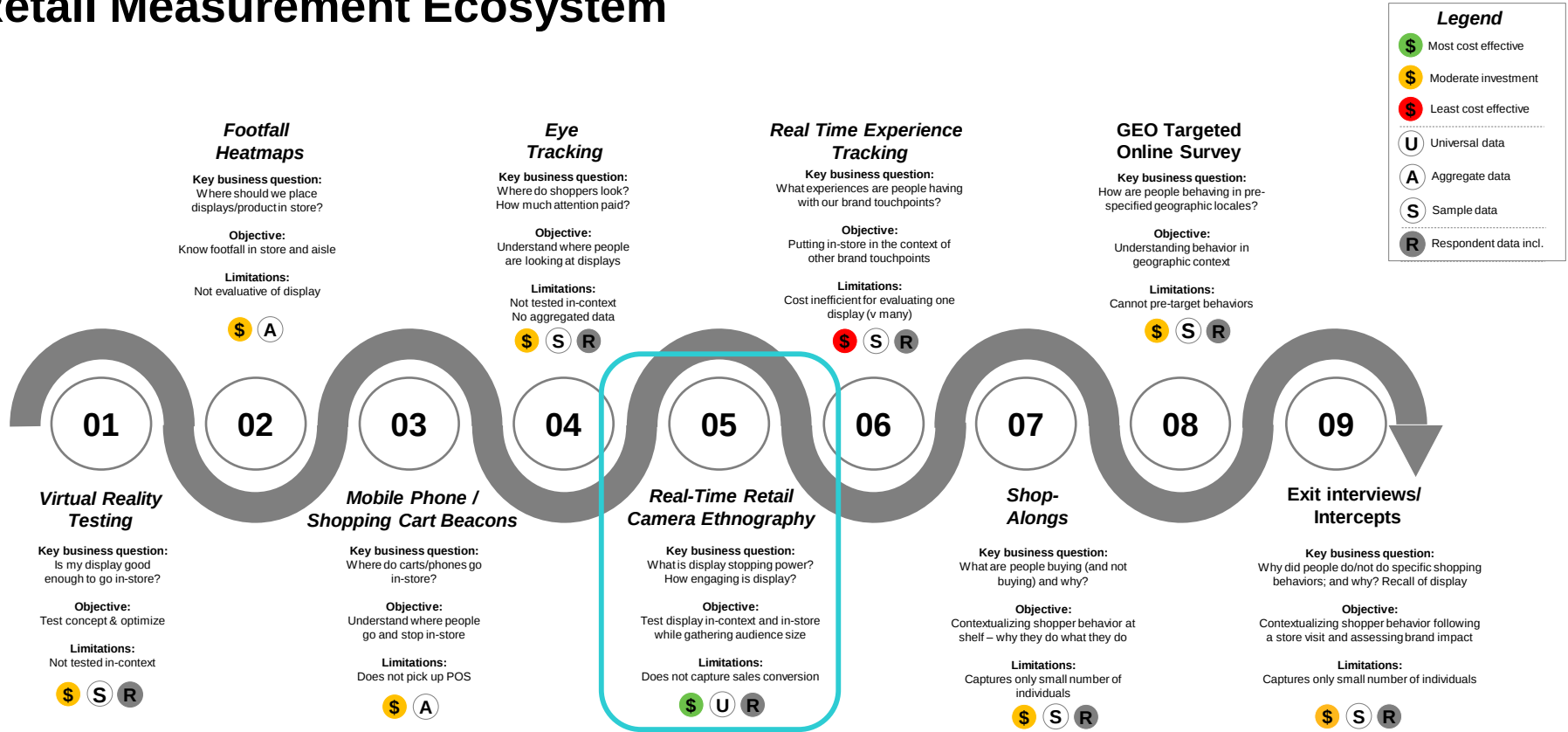


Who is reached with what engagement?

Existing measures can be costly or suffer from limited data



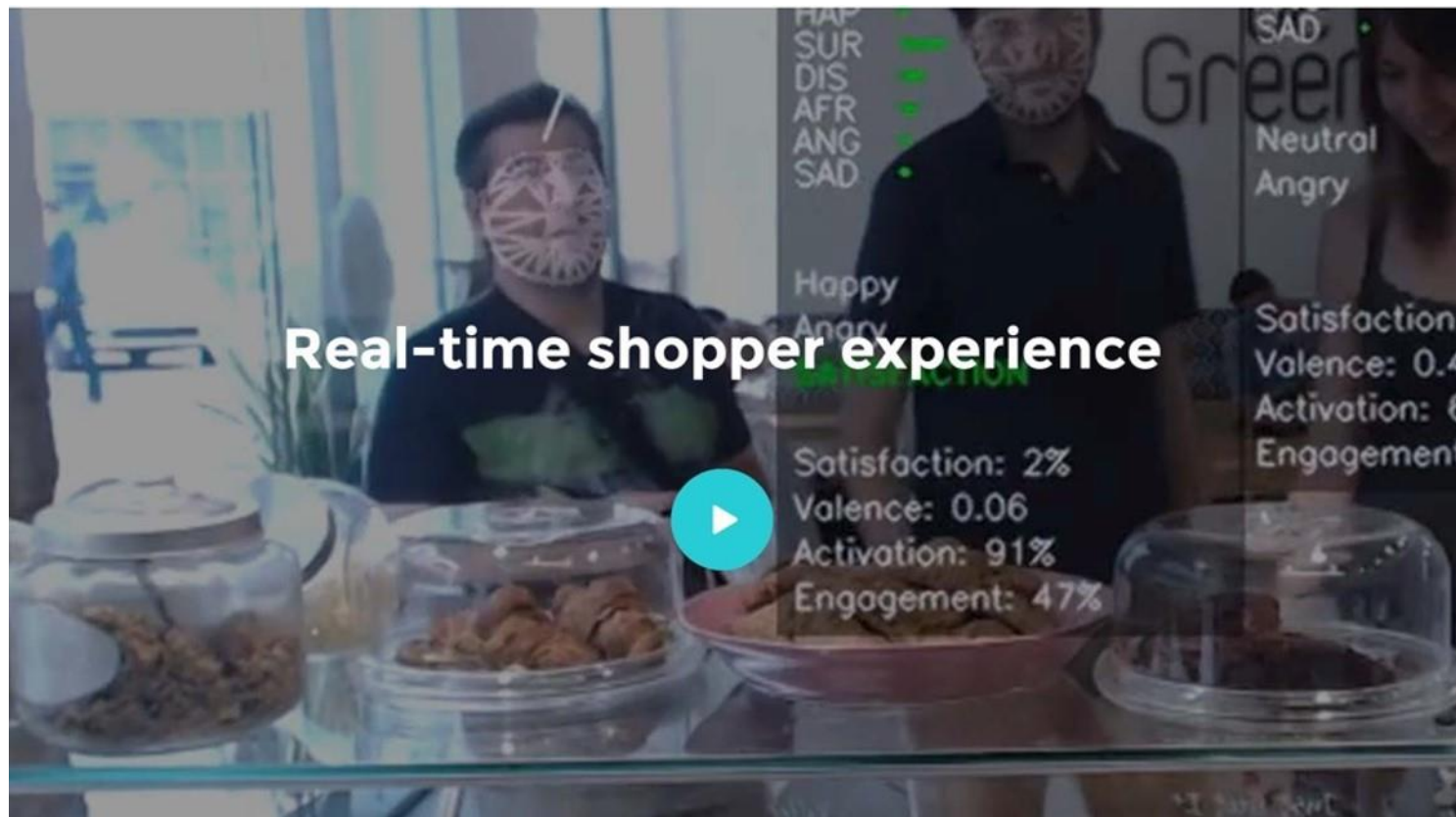
Retail Measurement Ecosystem



A man and a woman are walking down a modern staircase, smiling and looking at each other. The woman is pointing upwards with her right hand. They are both holding shopping bags. Overlaid on their faces are white wireframe mesh structures, representing facial recognition technology. Two red circular icons with white smiley faces are positioned above them, connected by thin white lines to the mesh overlays on their faces. The background is a blurred indoor setting with warm lighting.

MESH Experience Real-Time Retail Evaluation

Real-time shopper experience

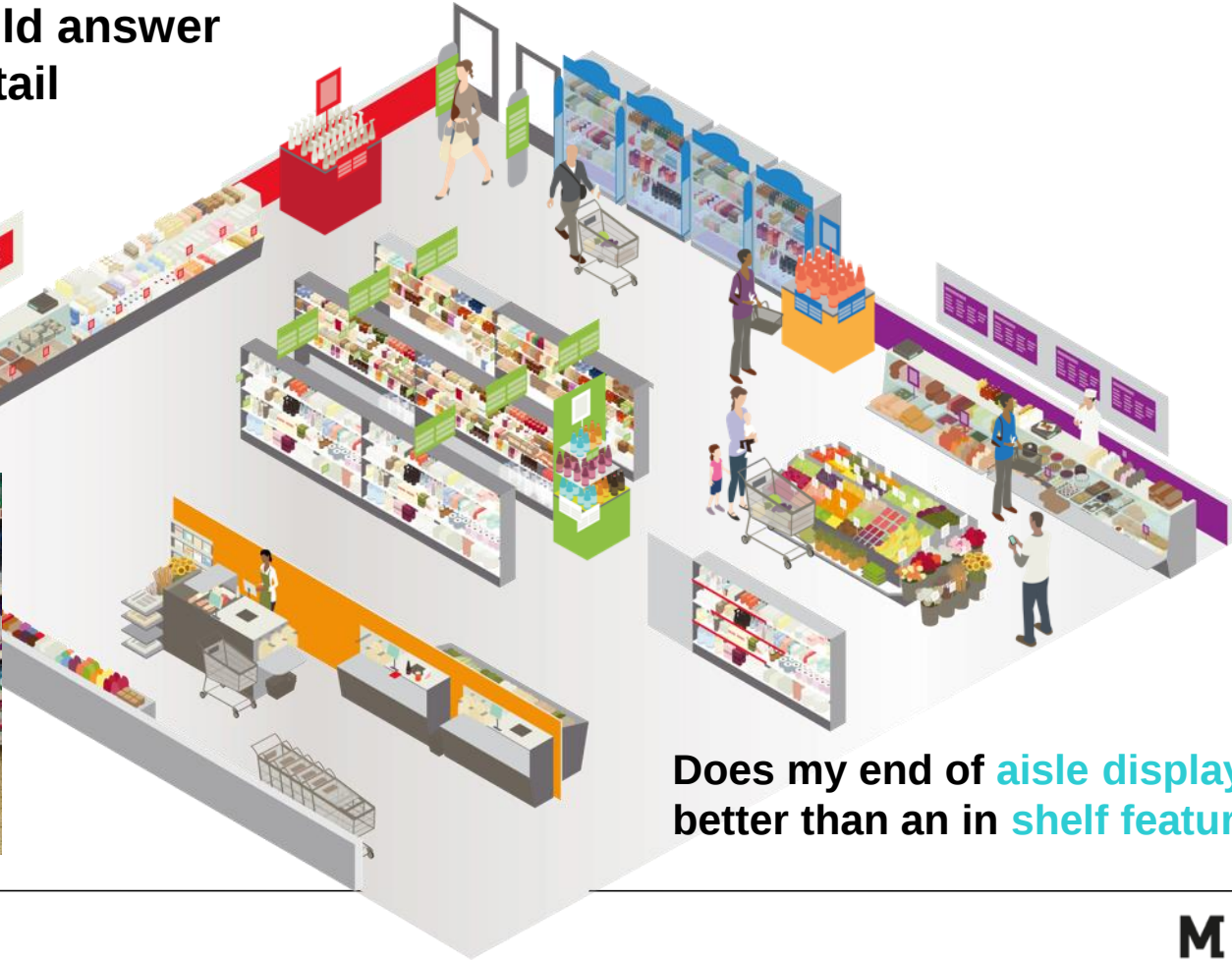


Real-time Retail: the key points

- Captures people's reactions in the *real world in real time.*
- Identifies whether the display has *stopping power and engages the viewer.*
- Collects basic demographic data to indicate *which groups are engaged.*
- Is *tech-enabled* without the privacy issues of video. The cameras are *unobtrusive.*
- Is *scalable and cost efficient.*

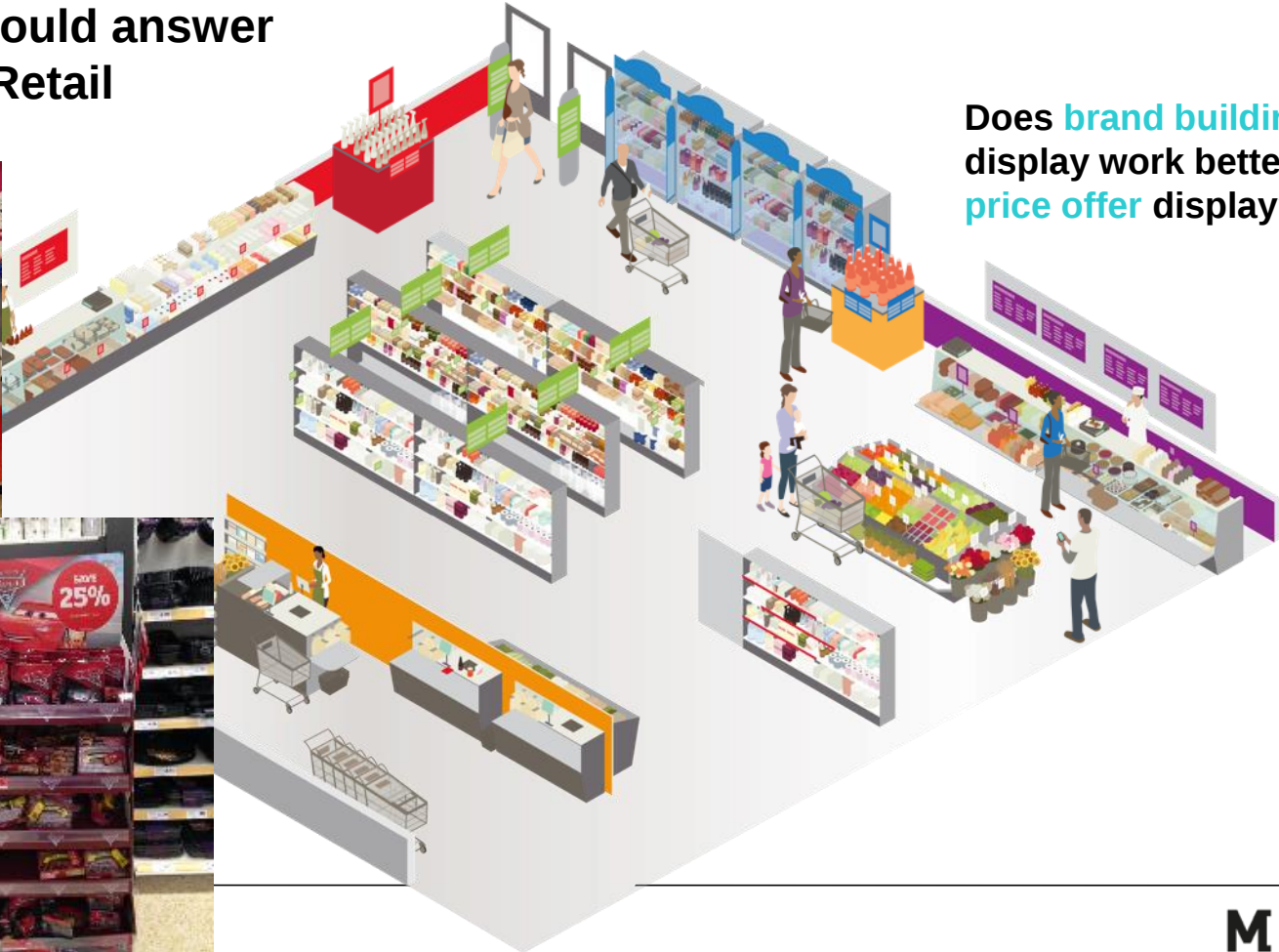


Questions we could answer with Real-time Retail



Does my end of aisle display work better than an in shelf feature?

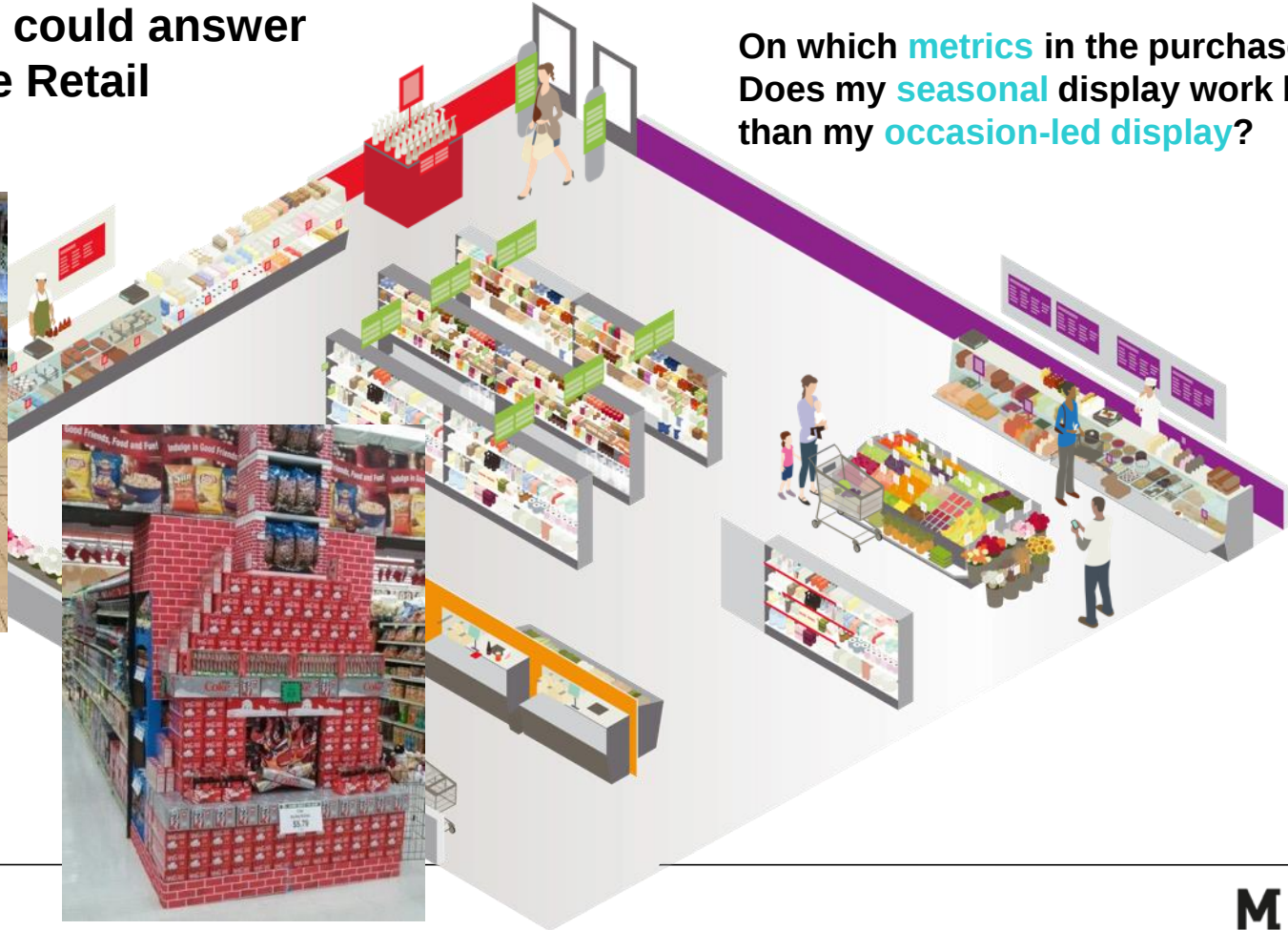
Questions we could answer with Real-time Retail



Does **brand building**
display work better than
price offer display?

Questions we could answer with Real-time Retail

On which **metrics** in the purchase funnel Does my **seasonal** display work better than my **occasion-led display**?



Questions we could answer with Real-time Retail



Which stores does the same display work in most successfully?

Questions we could answer with Real-time Retail



Which **days of the week/times of day**
does my display work most successfully?

Case Study 1



Working with Unilever



Market:
Brazil,
São Paulo



Objective:
Assess the
impact from
a change of
store display



Brand:
Knorr
Seasonings



Product:
New, healthier
seasoning range
with natural
flavourings and
25% less salt



POS:
Shelf Hanger
“stopper” placed
either side of the
product range

We compared 2 periods to see changes in shopper display interaction.

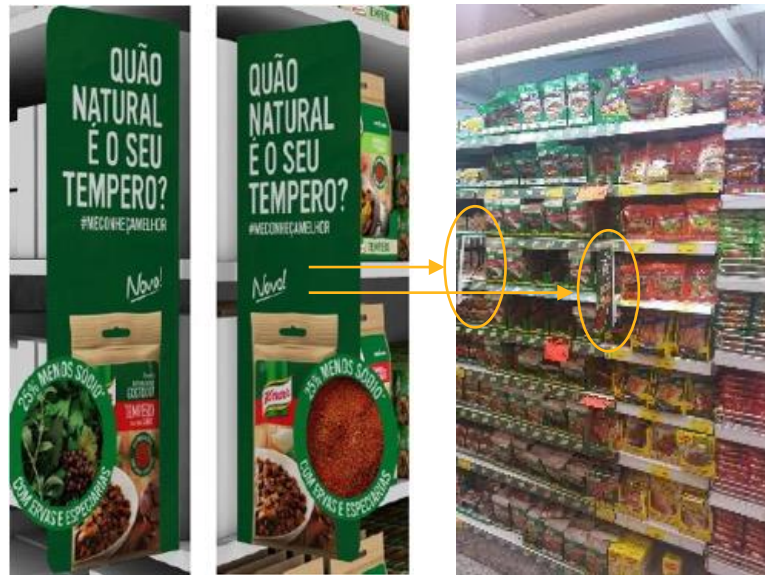
Period 1 – “no display”

Fri 3rd to Thu 16th Nov 2017



Period 2 – “display”

Fri 1st to Thu 14th Dec 2017



Real-time Retail Terminology

Viewer

Someone who was looking at the display for at least 1 second

Noticeability

The number of Viewers

Attention

How long the Viewer(s) looked at the display in seconds

Engagement

The % of Viewers who were Happy whilst they were looking at the display



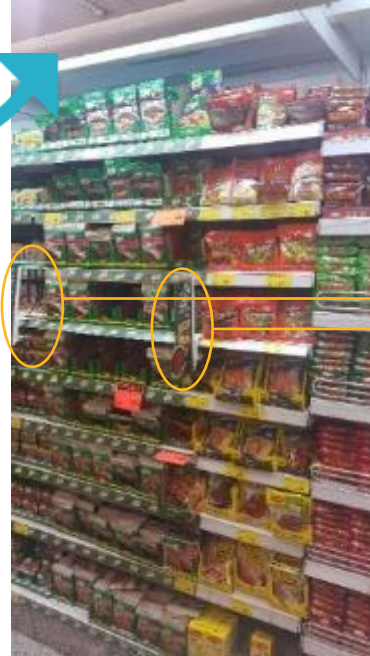
Noticeability increases by 3.5 times with Display

No Display **185**



VS

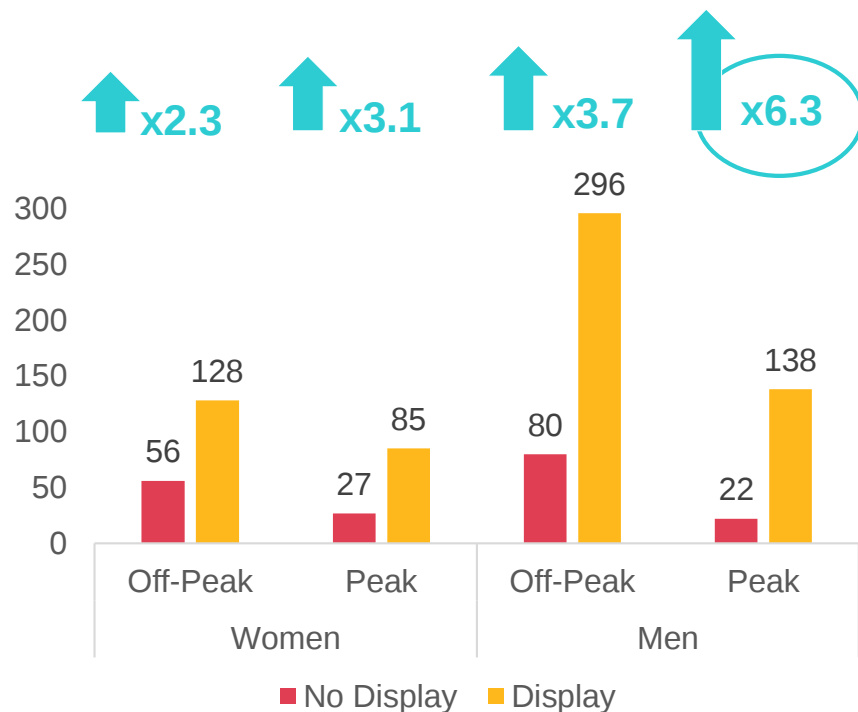
Display **647**



Noticeability
↑ x3.5



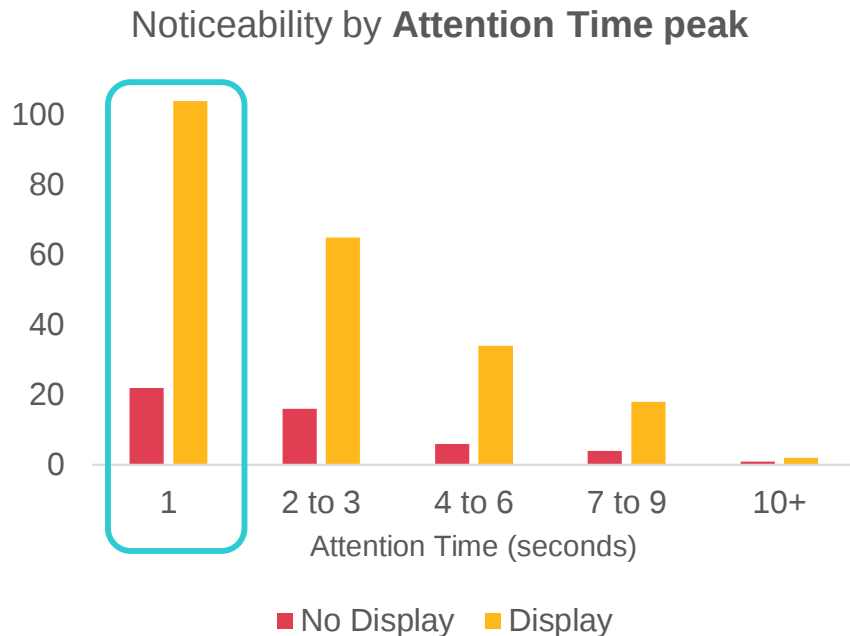
Display seems to impact on men



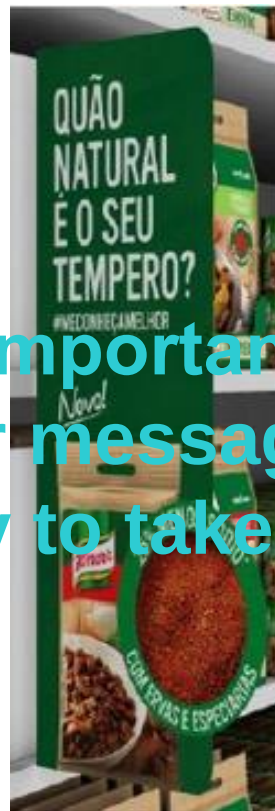
On average people pay attention for just 3 seconds



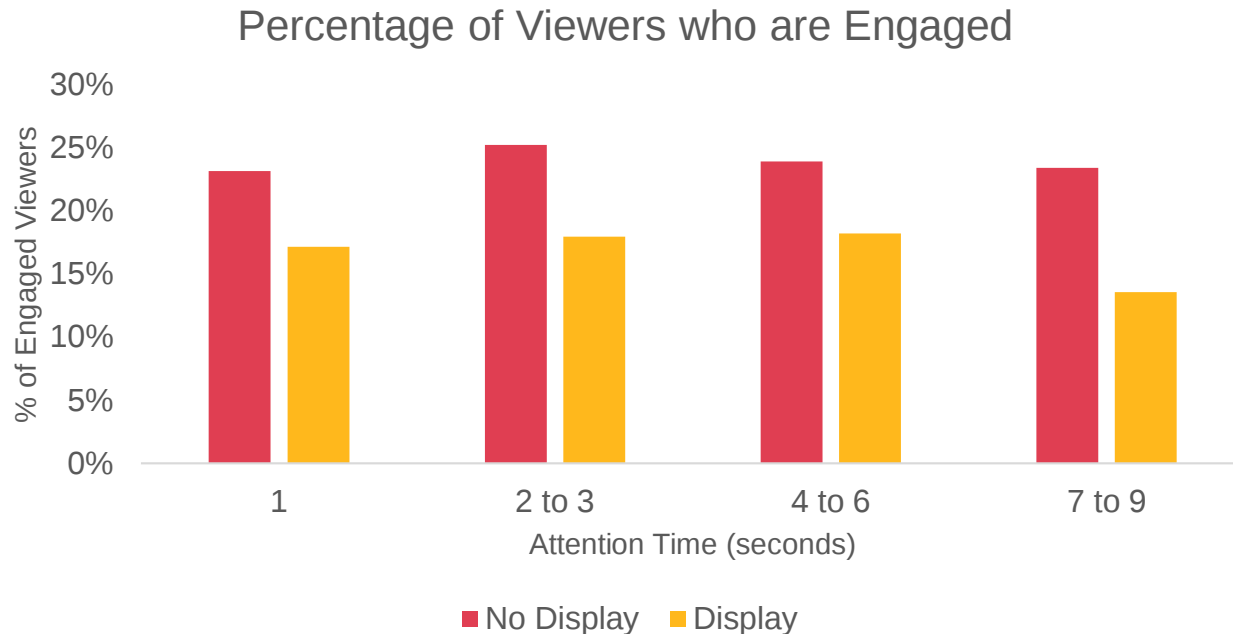
Most peak time views only last 1 second



It's important that your message is easy to take out.



Shoppers less likely to show positive emotions looking at display



Is this due to catching attention of those not buying stock cubes?

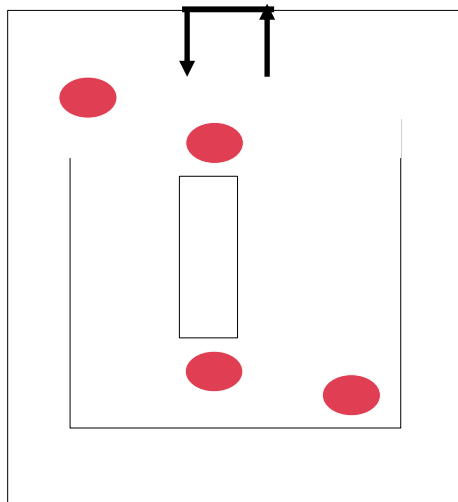


The display may still be increasing awareness for long term brand building

Case Study 2



Display matters

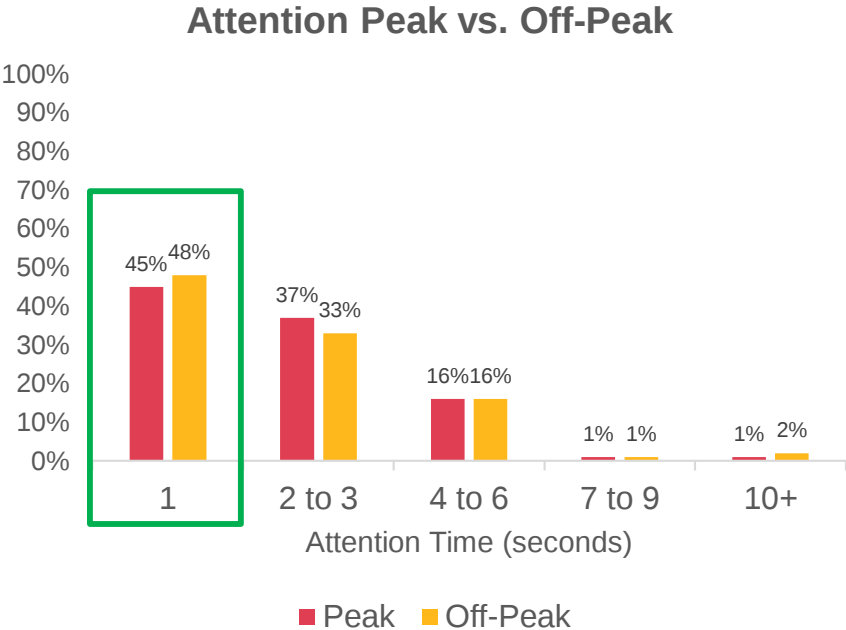


	Total All Displays	Front End Cap	Brand Block	Rear End Cap
Shoppers captured	xxx	xxx	xxx	xxx
Noticeability	yyy	yyy	yyy	yyy
Conversion	18%	12%	28%	46%
Proportion of Noticeability	100%	51%	32%	15%
Attention (secs)	2.33	2.24	2.29	2.73
Engagement (%)	15	15	11	21

Shoppers captured is a very strong predictor of display brand sales



Most views **last only one second** – whether the store is busy or not



0:01

Implications for Marketers

- \$Billions is spent on display with a *dearth of evaluation*
- Technology can help FMCG marketers understand the *Return* on their investment
 - How many people is the display *reaching*?
 - Much more than store traffic – location matters
 - Does the display *engage* people?
 - Is this building brand?
 - Does it *convert* to sale?
 - Today or tomorrow?
- *Camera ethnography* fills a specific gap cost efficiently without privacy issues





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Thank you!

www.meshexperience.com



MESH Experience is a data and analytics company working with Fortune 500 organizations, like Delta Air Lines and LG Electronics. We believe that brands today should take an Experience Driven Marketing approach, looking through the eyes of the customer to understand all paid, owned and earned brand encounters. Our proprietary methodologies, datasets and models help us give clients faster and better advice on how to optimize their marketing investment. Real-time Experience Tracking (RET) was described by Harvard Business Review as “a new tool (that) radically improves marketing research