

Eye Opening Eye Tracking at Retail

Barbara Barclay
General Manager North America

In-Store Communication – Key to Driving Sales

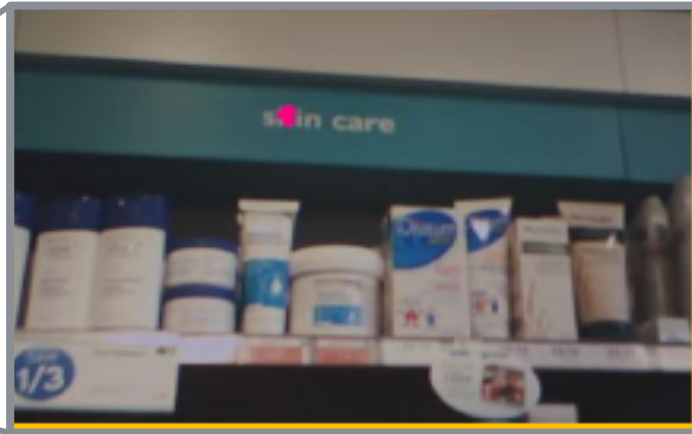
Attention – Is it noticed when shopping?

Interest – What does it say about the brand?

Motivation– Does it make you buy the brand?

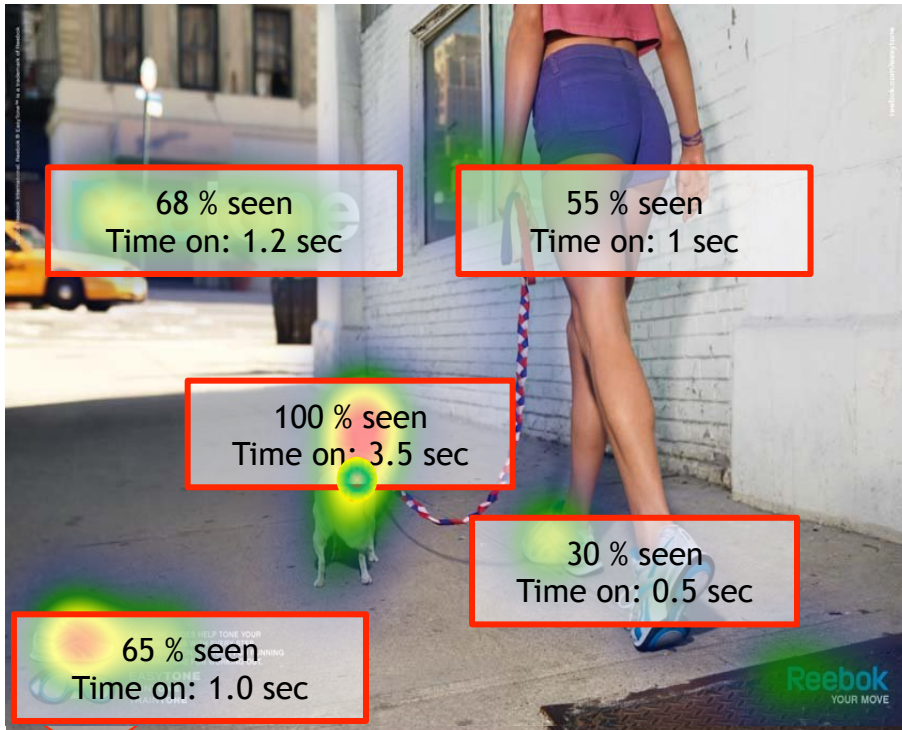
Eye tracking adds objectivity and facilitates the research process by providing recordings that include the eye gaze point

Illustrates how consumers process EXACTLY WHAT they see



“It’s like getting inside of a person’s head and watching what they see — with the advantage that a computer is recording every eye movement for later analysis”

Exactly WHERE, WHEN and for HOW LONG



- Captures the respondent's visual behavior prior to when decision is made
- Generates Insights in how decisions are made and how consumers categorize products, brands and communication
- Captures natural and intuitive behavior
- Adds a higher level of insight on traditional methodology and research

“Knowing what consumers see is a vital first-step to ensuring marketing effectiveness. Eye tracking offers a unique method to objectively measure consumers’ attention and spontaneous responses to visual communication.”

Research Questions

- What features on glasses does a shopper look at first?
- What's the best way to set up a display?
- What information helps a shopper?
- How does a retailer attract and keep a shopper?
- Converting a shopper to a buyer?
- How do different people shop for eye wear?
- What type of research do people do before they come in?
- How can you integrate with online shopping?

Our Latest Technology



Selected Tobii Corporate Clients Today

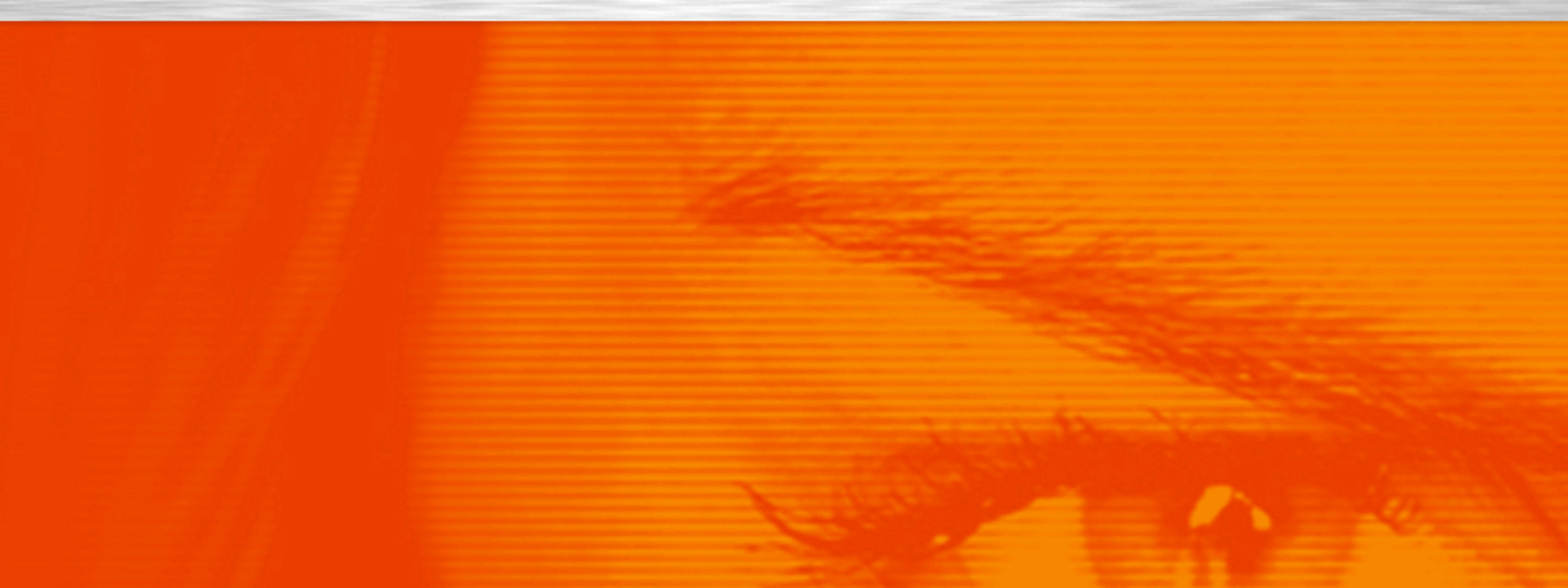


Massachusetts
Institute of
Technology



Tobii: The Global Leader in Eye Tracking

- 400 employees worldwide dedicated to eye tracking; 150 in R&D
- Strong growth every year since inception in 2001: 60 MUSD revenue
- Very strong leadership in the global eye tracking market
- By far the most robust eye tracking technology optimized for consumer markets
- Complete solutions spanning from hardware and software to full scale global eye tracking consulting projects



**THE MARKET IS LITTERED WITH POORLY CONCEIVED
DESIGNS**

Tropicana – Sales declined 16%



The image shows the old logo for GAP, consisting of the letters 'GAP' in a tall, white, serif font centered on a dark blue rectangular background.

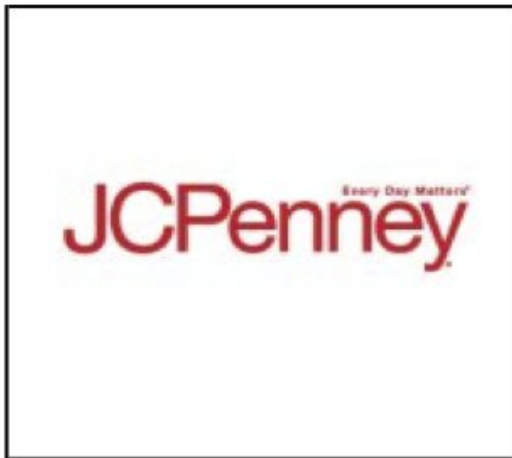
BEFORE

The image shows the new logo for Gap, consisting of the word 'Gap' in a bold, black, sans-serif font on a light gray background. A small blue square is positioned to the right of the letter 'p'.

AFTER

JCPenney

Apr-10



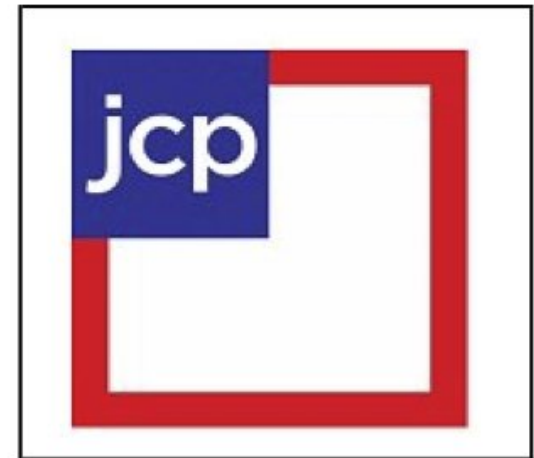
| Awareness | % |
|-----------|----|
| Logo | 84 |

May-11



| Awareness | % |
|-----------|----|
| Logo | 76 |

Mar-12



| Awareness | % |
|-----------|----|
| Logo | 56 |

Source: E-Score Brand

- Shop All Departments
- Unlimited Instant Videos
- MP3s & Cloud Player
- Amazon Cloud Drive
- Kindle
- Appstore for Android
- Digital Games & Software
- Audible Audiobooks
- Books
- Movies, Music & Games
- Electronics & Computers

Search All Departments

GO Cart Your Lists

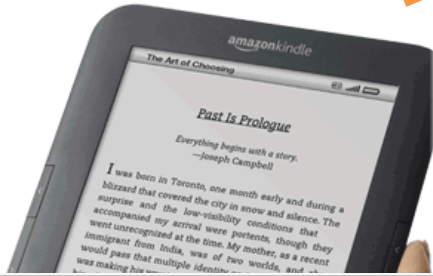
Kindle

The Best-Selling e-Reader in the World



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- Toys, Kids & Baby
- Clothing, Shoes & Jewelry
- Sports & Outdoors
- Automotive & Industrial
- Full Store Directory

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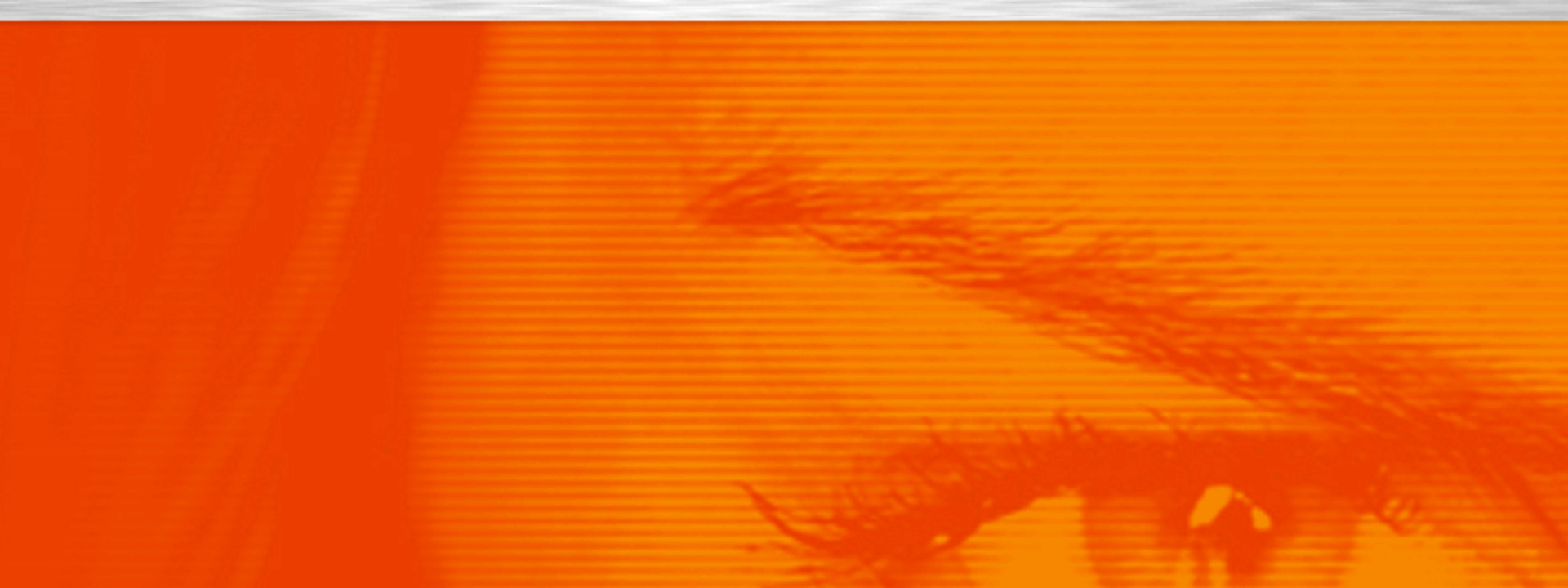
TOP PICKS FOR BACK-TO-SCHOOL
Kids' blazers, polos, must-have supplies, and more.



- [Shop Boys' Clothing](#)
- [Shop Girls' Clothing](#)
- [Shop Across Amazon](#)



Football Kickoff 2013
Gear up for gameday
[Shop now](#)



P&G STANDS OUT AS EXPERT IN USE OF EYE TRACKING FOR PACKAGE AS WELL AS IN-STORE POS

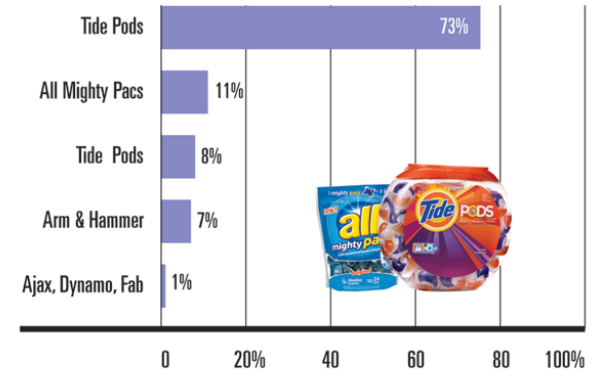
Completely New Package Shape, Brand Extension Use Situation



Category sale down 2% ending June
P&G sales up! – and share up

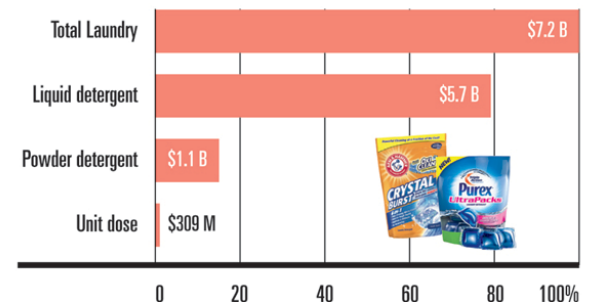
HOW THE PODS STACK UP

Sales of unit-dose laundry products



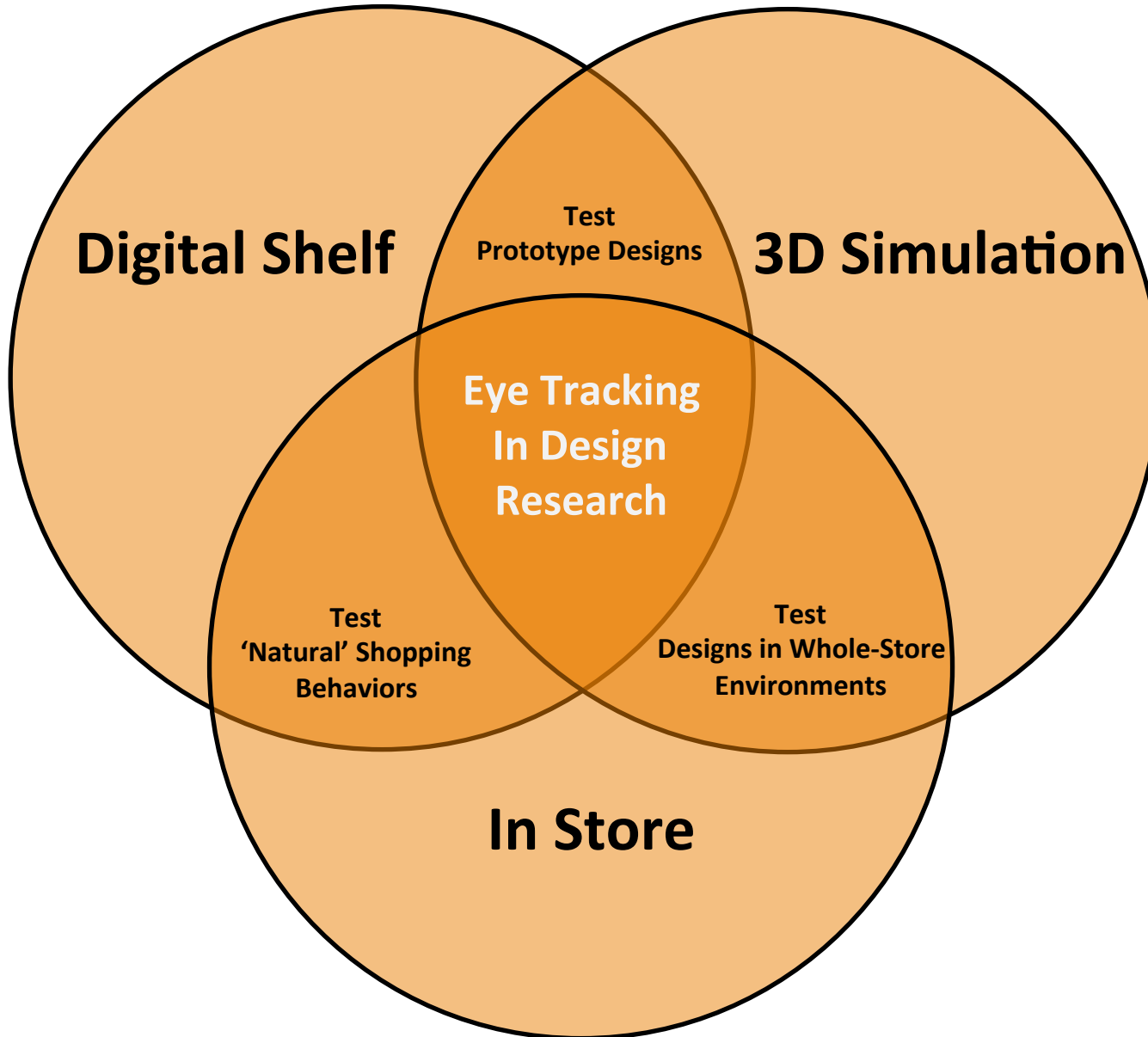
TRENDS IN LAUNDRY

Powder detergents have been losing ground to liquids for years, but in the past year, unit volume and sales of liquids have also fallen as unit-dose products, led by Tide Pods, came to market. In just seven months of availability, unit-dose products already had more than a quarter of the sales and volume of powder, which is sinking even faster.

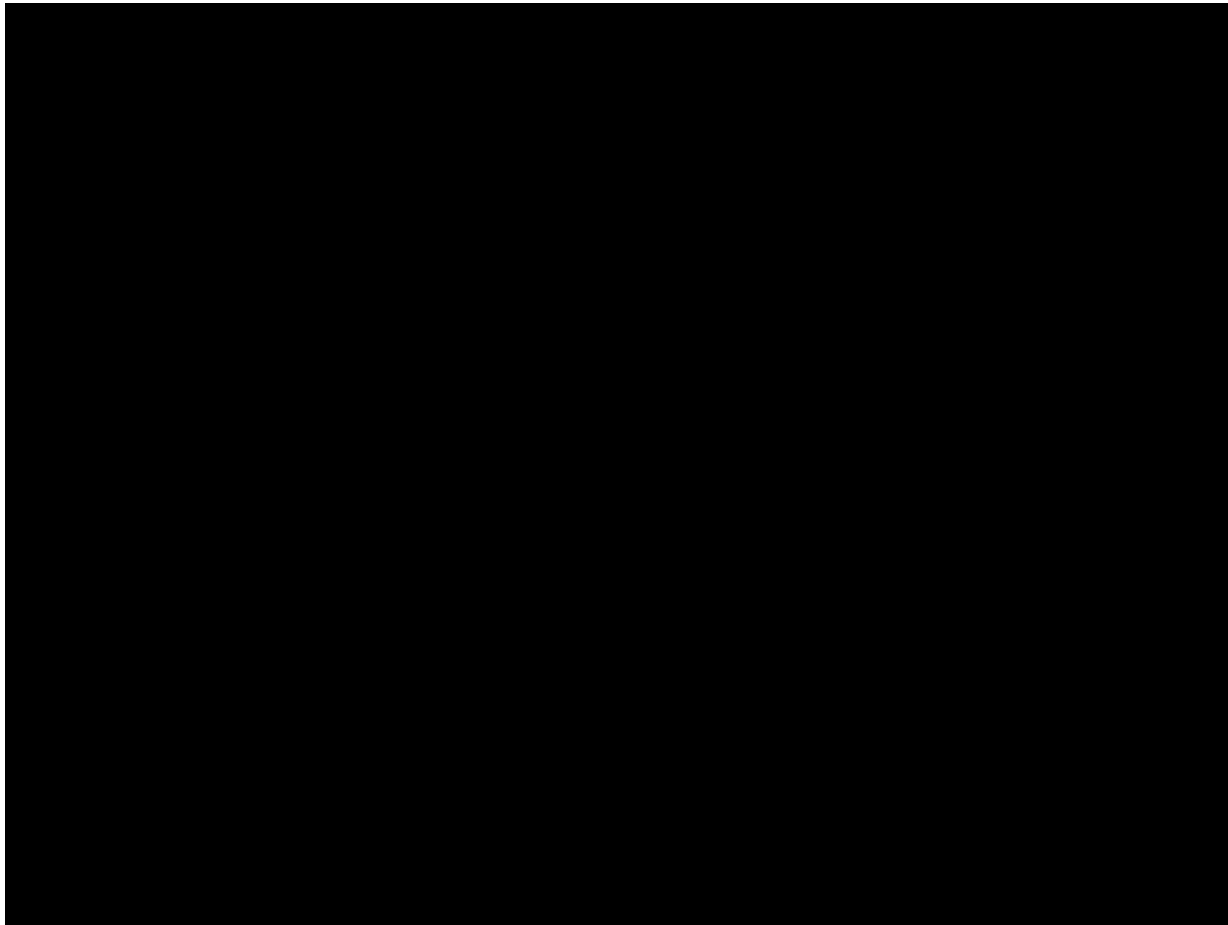


Once Objective Established....

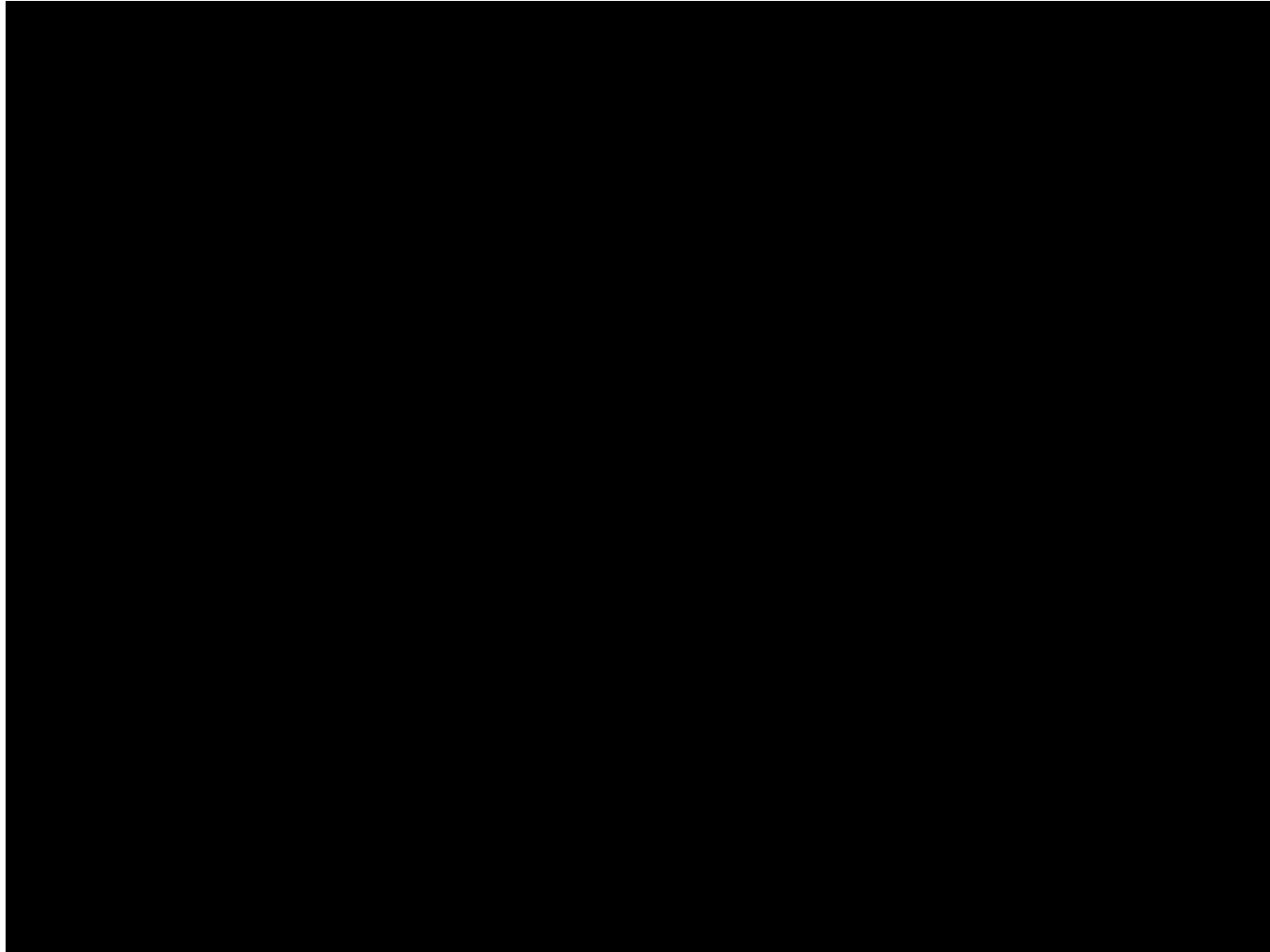
- **Visibility**
- **Communication**
- **Purchase Intent**
- **Consumer Perceptions**

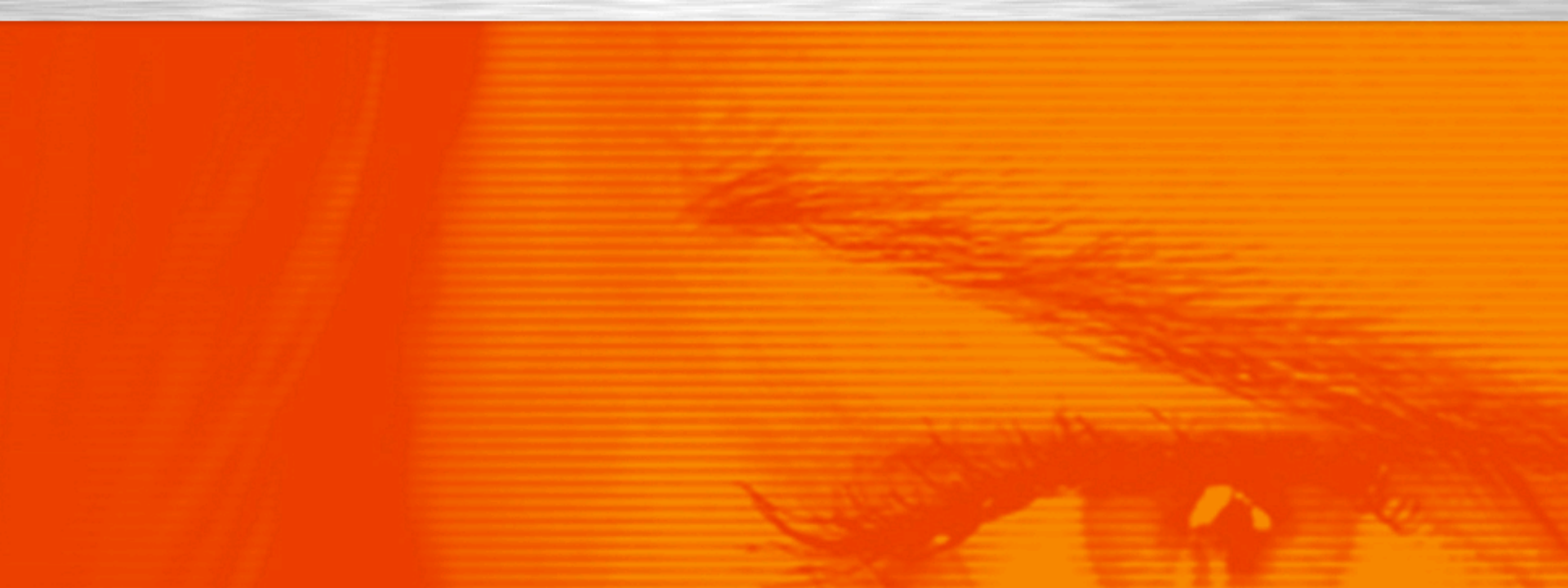


Digital 3D Store Environments



Physical In-Store Environment





BRAND IS MASKED
METHODOLOGY SIMILAR FOR MANY STIMULI

Executive Summary

Findings of the current study are provided on the following slides. These results cover:

- Visibility
- Communication
- Intent to purchase
- Shopper perceptions
- **Actionable Insights**

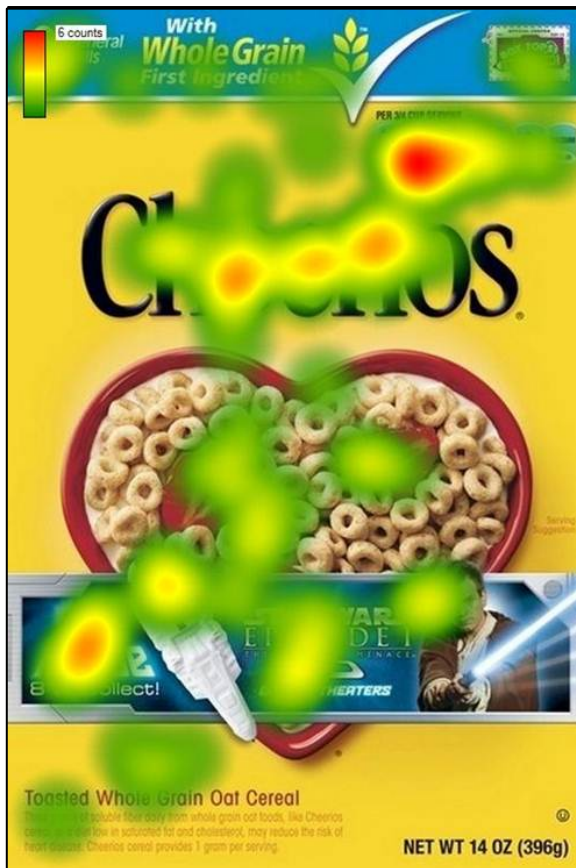


Study Results

Package Element Visual Attention: Results of analysis of overall attention to package elements are provided below

Show
Neon

Show
Current



Heat Map Graphic: Long Fixations for *Current* – Fixations greater than 500ms rendered.

| Element Reach Results | Element Interest Results | |
|---|--------------------------|----------------|
| Package Element <u>Reach</u> % of participants fixating on element | Neon | Current |
| Cheerios Branding | 92.0% | 91.5% |
| Food Shot | 87.3% ★ | 62.8% |
| Special Offer | 61.0% | 68.5% |
| Nutrition Information | 42.6% | 55.3% ★ |
| “Whole Grain” Text | 21.5% | 31.2% |

Definition and interpretation of metrics are provided on Appendix slide XX

★ The Food Shot was viewed for significantly y longer on Neon, while the NI was viewed for longer on Current (P <.05)



Study Results

Flow of Visual Attention: Results of analysis of the visual path of consumers across package elements are provided below.

Show Neon

Show Current



Perceptual Flow: Order elements most commonly viewed on *Current*

| Element Immediacy Results | Element Revisit Rate Results | |
|--|------------------------------|---------|
| <u>Package Element Immediacy</u> Time to first fixation on each element | Neon | Current |
| Cheerios Branding | 0.6 sec | 0.8 sec |
| Food Shot | 1.6 sec | 1.8 sec |
| Special Offer | 2.6 sec | 2.8 sec |
| Nutrition Information | 3.6 sec | 3.8 sec |
| “Whole Grain” Text | 4.6 sec | 4.8 sec |

Definition and interpretation of metrics are provided on Appendix slide XX



Study Results

Standard Shopper Perception Items: Positive responses to standard likert response items are provided below.

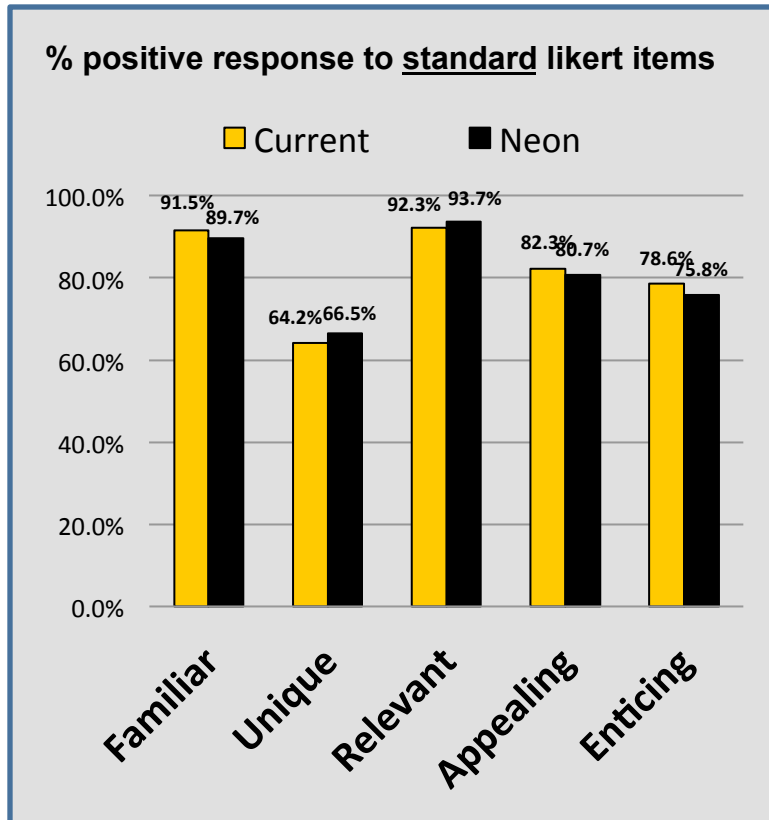


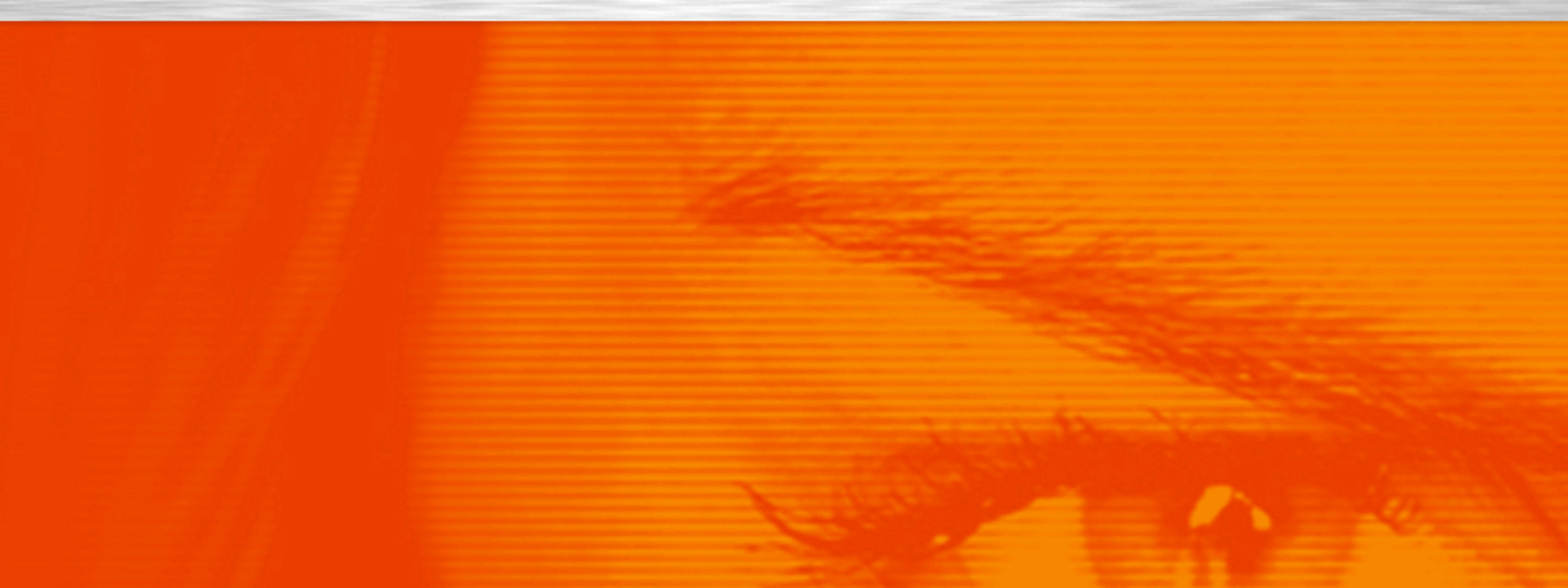


Figure 4: The chart above provides the % of positive responses (Agree & Strongly Agree) to standard likert items. See Appendix [slide XX](#) for a full table of results.

| | Familiar Element Reach | Unique Element Reach | Relevant Element Reach | Appealing Element Reach | Enticing Element Reach |
|---|---------------------------|-------------------------|---------------------------|---|---|
| Element Reach During The Following Likert Item: | | | |  |  |
| <i>The package looks familiar to me.</i> | | | | Neon | Current |
| Cheerios Branding | | | | Premier Upgrade | Premier Upgrade |
| Food Shot | | | | Premier Upgrade | Premier Upgrade |
| Special Offer | | | | Premier Upgrade | Premier Upgrade |
| Nutrition Information | | | | Premier Upgrade | Premier Upgrade |
| “Whole Grain” Text | | | | Premier Upgrade | Premier Upgrade |



USING GAZE INTERACTION IN-STORE TO DRIVE EXPERIENCE

Tobii Gaze— Your Interface Re-defined

- Open your eyes to a new way of communicating, interacting, playing and working
- Eye gaze is a direct way of pointing that takes away the intermediary step of moving the mouse cursor with a mouse or a touchpad. And enables the computer to almost read your mind.
- Select. Scroll. Pan. Zoom. Navigate. Experience.
- Instant, Intuitive, Effortless, Amazing

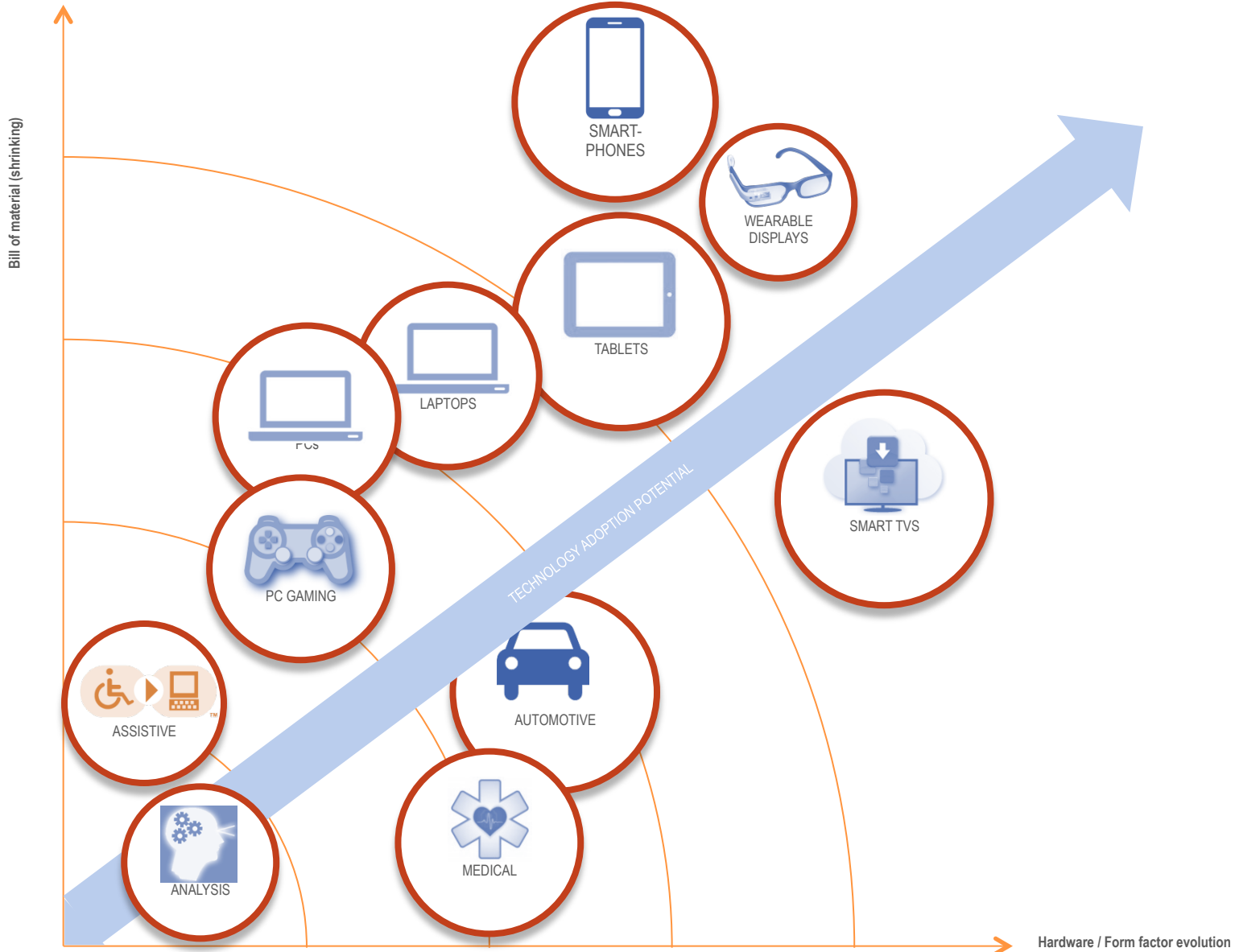
“When the great history books of technology are written, the early 2000s may be remembered as the Age of Human-Computer Interface Exploration... Tobii’s system works perfectly, flawlessly, exhilaratingly with nothing but the awesome power of your gaze — and the possibilities are limitless.”

The New York Times

Design your own tablet kiosk



TECHNOLOGY EVOLUTION AND AMARKETS



A close-up photograph of a human eye, heavily tinted with a vibrant orange color. The eye is looking slightly to the right. The eyelashes are visible, and the overall image has a soft, ethereal quality.

THANK YOU!
BARBARA BARCLAY - TOBII TECHNOLOGY