

Canadian Meat Council 91st Annual Conference

Halifax, Canada

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Predictions

1. Flyer Ads as we know them will disappear in 5 years
2. The Store will be recognized as the new communication medium
3. PDA's will be a tool for marketing at retail
 - » Auto download to cell phones or frequent shopper cards
4. Social Networks will make winners and losers of brands

Predictions

5. Interactive will be common in the store
 - Consumers will 'pull' or 'attract' messages rather than have marketers shout at them
6. Technology will drive 'active' retailing
7. Annual media and communication planning between retailers and manufacturers will be the norm
8. Meat category become even more critical to grocery retail

Weekly Flyer relevancy

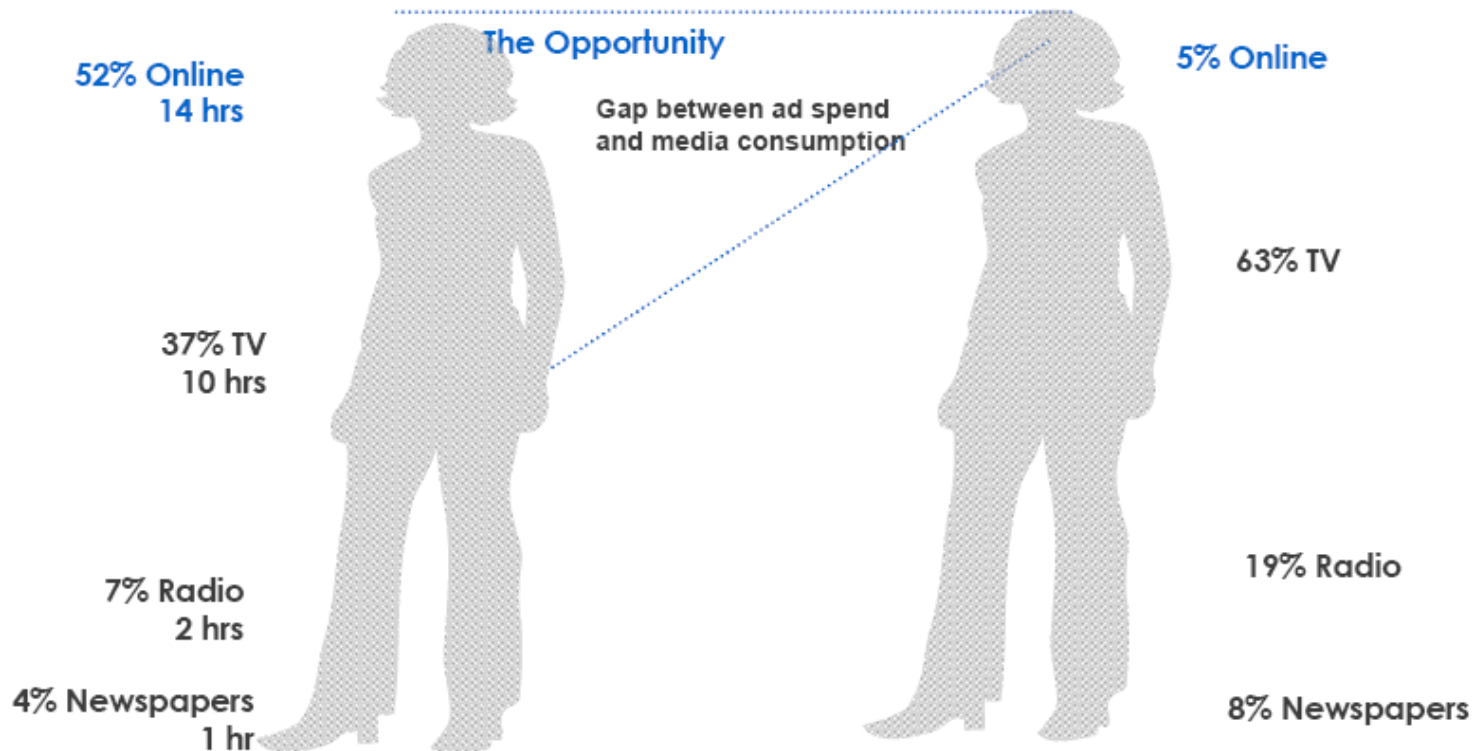
- Not Digital
- Fixed duration and Brands
- Doesn't speak to me



Consumers now use different media

Weekly Media Consumption

US Ad Investment



Re-allocate Spend

Path to Purchase

Historical Path to Purchase



NEW Historical Path to Purchase



Effect of Pre-Shopping Network



	Annual Query Volume
recipes	153,200,000
weight loss	54,540,000
soap	26,970,000
shampoo	15,820,000
deodorant	3,569,000
mayonnaise	1,475,500
pasta sauce	1,292,000



Many influences along Path to Purchase



At Home

- Paid Media
- Relationship Marketing
- Product Placement
- Social Media
- Customer Searches



On the Go

- Mobile
- Billboards
- Radio
- Social Media



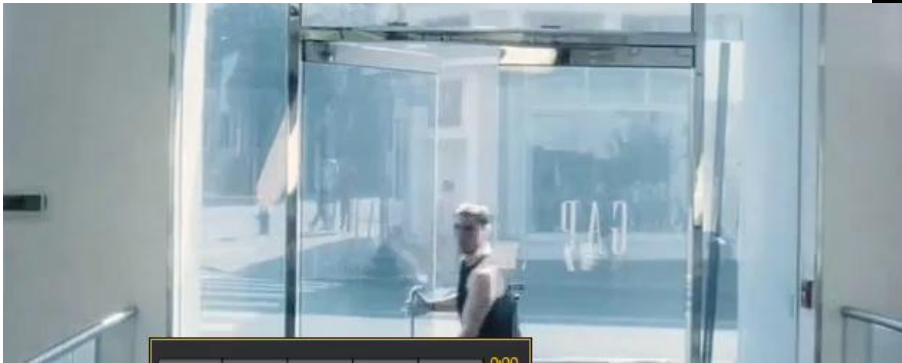
In-Store

- Packaging
- Shelf Signage
- Displays
- Sampling
- Video

New Opportunities to talk to Consumer

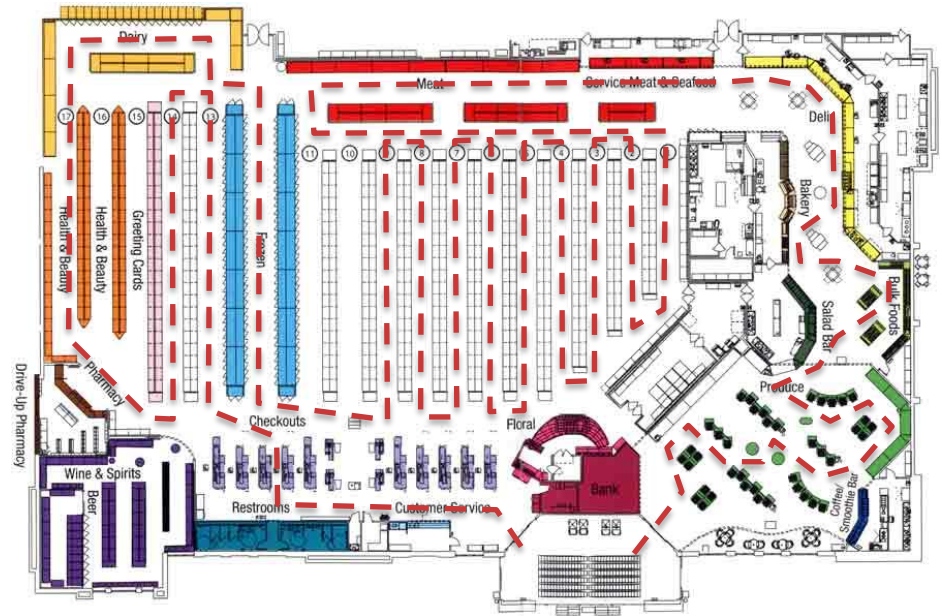
Working On

Way Out



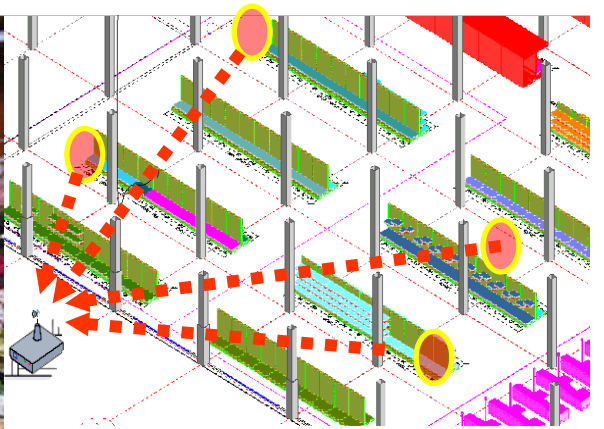
Watching Out for

Path to Purchase Tracking

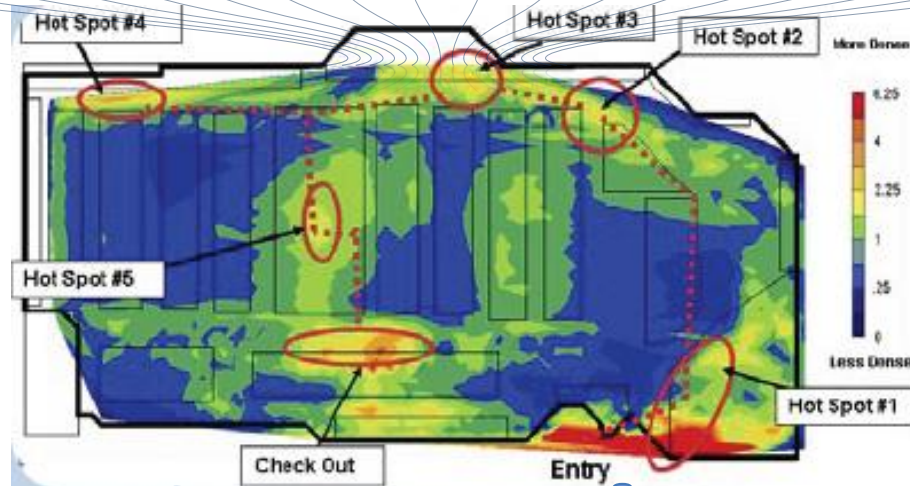


Linking Customer – Cart – Path & Purchase

New Measurements New Math



Traffic



Dwell
Time

Conversion

Grocery is uniquely Positioned to Provide Personalization



Data Access

- POS- Rich Shopper purchase data
- Loyalty Card- Even more detail



Consumer Access

- Weekly Visits
- Wide Reach and Frequency



Importance of Fresh

- Trust only Grocery
- Key Point of Difference in Retail

Use the Store to Communicate with Customers

Deliver fully integrated meal or Event-Driven store sections

- Breakfast/Lunch/ Dinner
- Seasonal (BBQ/Holiday)
- Party (Birthday, Superbowl)



Permanent End Cap

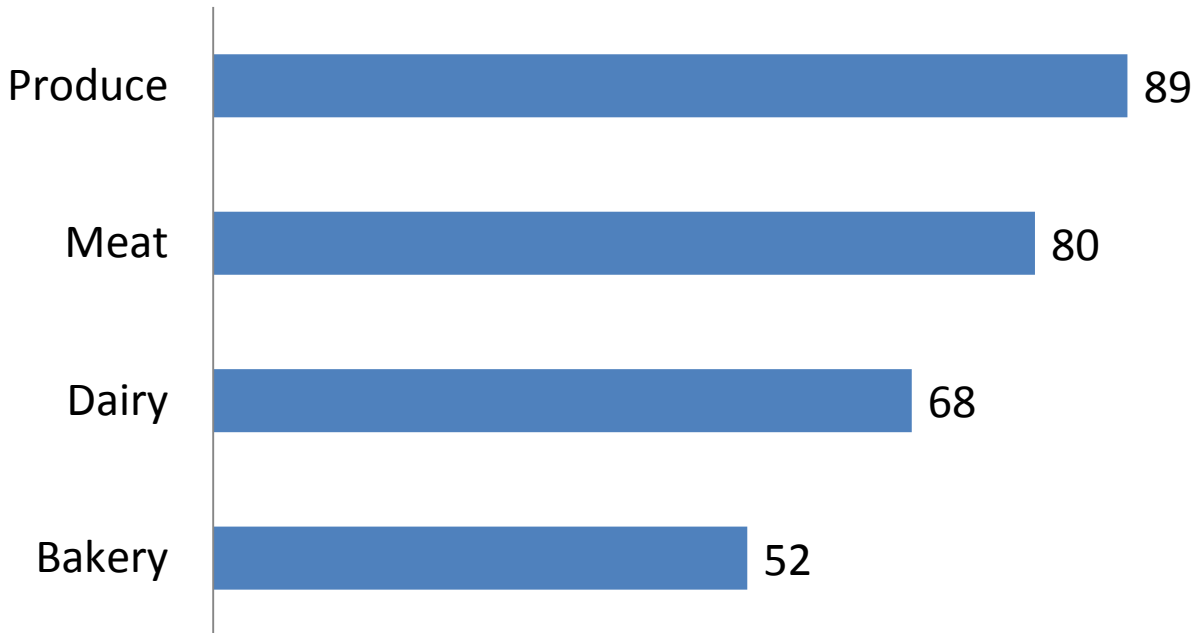
Use the 'Home Shelf' to Communicate Solutions



Yogurt Category Communication

Grocers will need to capitalize on importance of fresh in order to differentiate from competitors

Importance in determining grocery store choice



These are large categories

Conclusions

- Grocery Retail Needs your assistance
- Fresh is a critical category for differentiation
- Use the store as your communication medium
- Collaborate with retailers to test and develop programs

Thank You

Peter Townsend

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