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”
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.

- 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.
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
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%
JCPenney

<table>
<thead>
<tr>
<th>Date</th>
<th>Awareness</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apr-10</td>
<td>Logo</td>
<td>84</td>
</tr>
<tr>
<td>May-11</td>
<td>Logo</td>
<td>76</td>
</tr>
<tr>
<td>Mar-12</td>
<td>Logo</td>
<td>56</td>
</tr>
</tbody>
</table>

*Source: E-Score Brand*
Kindle
The Best-Selling e-Reader in the World
From $114
Order now

All-New kindle paperwhite
The best device for reading, period.
From $119
Pre-order now

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

Tide Pods | 73%  
All Mighty Pacs | 11%  
Tide Pods | 8%  
Arm & Hammer | 7%  
Ajax, Dynamo, Fab | 1%  

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.

Total Laundry | $7.2 B  
Liquid detergent | $5.7 B  
Powder detergent | $1.1 B  
Unit dose | $399 M  

SOURCE: SYMPHONYIRI, 12 WEEKS ENDED 6/29/04 FOR FOOD, DRUG, MASS, WALMART PLUS SELECT CLUB AND DOLLAR STORES AND MILITARY OUTLETS
Once Objective Established….

- Visibility
- Communication
- Purchase Intent
- Consumer Perceptions
Eye Tracking in Design Research

Digital Shelf

3D Simulation

In Store

Test Prototype Designs

Test 'Natural' Shopping Behaviors

Test Designs in Whole-Store Environments

'Natural' Shopping Behaviors
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

<table>
<thead>
<tr>
<th>Package Element</th>
<th>Element Reach Results</th>
<th>Element Interest Results</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% of participants fixating on element</td>
<td>Neon%</td>
</tr>
<tr>
<td>Cheerios Branding</td>
<td>92.0%</td>
<td>91.5%</td>
</tr>
<tr>
<td>Food Shot</td>
<td>87.3%</td>
<td>62.8%</td>
</tr>
<tr>
<td>Special Offer</td>
<td>61.0%</td>
<td>68.5%</td>
</tr>
<tr>
<td>Nutrition Information</td>
<td>42.6%</td>
<td>55.3%</td>
</tr>
<tr>
<td>&quot;Whole Grain&quot; Text</td>
<td>21.5%</td>
<td>31.2%</td>
</tr>
</tbody>
</table>

Definition and interpretation of metrics are provided on Appendix slide XX

- The Food Shot was viewed for significantly longer on Neon, while the NI was viewed for longer on Current (P < .05)
### Flow of Visual Attention

Results of analysis of the visual path of consumers across package elements are provided below.

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

<table>
<thead>
<tr>
<th>Package Element</th>
<th>Immediacy</th>
<th>Revisit Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cheerios Branding</strong></td>
<td>0.6 sec</td>
<td>0.8 sec</td>
</tr>
<tr>
<td><strong>Food Shot</strong></td>
<td>1.6 sec</td>
<td>1.8 sec</td>
</tr>
<tr>
<td><strong>Special Offer</strong></td>
<td>2.6 sec</td>
<td>2.8 sec</td>
</tr>
<tr>
<td><strong>Nutrition Information</strong></td>
<td>3.6 sec</td>
<td>3.8 sec</td>
</tr>
<tr>
<td><strong>“Whole Grain” Text</strong></td>
<td>4.6 sec</td>
<td>4.8 sec</td>
</tr>
</tbody>
</table>

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.

![Chart showing positive response percentages for different elements]

**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.
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.
- 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 MARKETS

- SMARTPHONES
- TABLETS
- WEARABLE DISPLAYS
- SMART TVS
- LAPTOPS
- PC GAMING
- ASSISTIVE
- AUTOMOTIVE
- MEDICAL
- ANALYSIS
THANK YOU!
BARBARA BARCLAY - TOBII TECHNOLOGY