



Checkout Conference 2016

Think. Learn. Evolve...

The Round Room, The Mansion House, Dublin 2
Tuesday 2 February 2016

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Ahead of the 2016 Checkout Conference, we examine some of the themes that will be discussed at this must-attend event.



It's almost that time of year again! The 2016 Checkout Conference takes place in The Round Room of Dublin's Mansion House on Tuesday 2nd February 2016.

The Checkout Conference is the longest-running dedicated conference for the grocery retail and FMCG industries in Ireland, and the 2016 Conference will focus on the challenges facing grocery brands in an increasingly competitive marketplace.

About The Theme

The theme of the 2016 Checkout Conference is 'Think. Learn. Evolve...' The focus for the event will centre on how brands and retailers alike need to 'evolve' to a new way of thinking, in keeping with changed socio-economic circumstances.

We may be out of the downturn, but some of the key factors that influenced shopper

behaviour remain (obsession with value, the rise of the discounters, and the growth of private label). Where is the added value going to come from, and how can brand owners position themselves for the consumer need states of the future? The 2016 Checkout Conference will examine the opportunities open to businesses as we look ahead to the challenges of a new financial year.

The speaker lineup for the Checkout Conference can be found on the next few pages, however it is also worth examining some of the key themes that each speaker will address during his or her presentation.

Retail Issues

The Checkout Conference has a reputation for delivering first-class speakers, and we are

delighted to welcome Andrew Yaxley, chief executive of Tesco Ireland to give an exclusive presentation at the event. Over the past 18 months, the spotlight has been shone on Tesco like never before, with questions over its market share performance and the fallout from the UK accounting scandal shadowing its operations. But Tesco is looking forward to the new year with optimism, and Yaxley will outline how the retailer is looking to move on and build a brighter future.

Staying with retail, few groups have made such an immediate impact in the Irish market as Poundland, which trades as the Dealz franchise here. The group recently opened its 50th outlet, in Dublin, and has put in place plans to open as many as 100 outlets in the coming years. Overseeing much of its growth is Poundland trading director Simon Twigger, who will be outlining the group's strategy at the Checkout Conference.



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Lastly, the Irish convenience retail sector is widely held up as a benchmark for the format in both Europe and further afield, and indeed Ireland's record at the annual NACS Awards in the US is an indication of how we continually punch above our weight when it comes to this important sector.

In what is certain to be one of the highlights of the Checkout Conference, Tom

What Your Business Will Get From Attending The Checkout Conference:

■ *Insights from leading experts on the retail industries in Ireland and Europe*

■ *Insight from leading FMCG suppliers on effective branding, NPD, category management, and promotional and marketing strategy*

■ *A greater understanding of the typical shopper's needs and demands in a highly competitive marketplace*

■ *Presentations of exclusive research from Irish and European industry specialists*

■ *Access to the top FMCG networking event of the year*

For more information, visit www.checkout.ie

Fender of him! International, one of the foremost authorities on the c-store and forecourt industries, analyses just what it is about the sector that makes it tick, and why Irish c-stores deserve to be held up as being among the best in the world.



A Different Approach

It's often said in marketing circles that sometimes when the world 'zigs', you need to 'zag', and the Checkout Conference will feature two presentations from leading brands that have done just that. Heineken Ireland has cemented its position as the market leading brand in the off-trade sector not merely by 'following the herd' and increasing its price promotion capabilities, but by working with retailers to drive real 'added-value' initiatives in-store. Maggie Timoney, Heineken Ireland's managing director, will reveal how this has been achieved.

Also presenting at the event, Tom Keogh of Keogh's, the recently-named Marketer of the Year will explore how his company took an everyday staple food - the humble spud - and created a brand that resonates with shoppers, not to mention a premium crisp range that is now exported to 14 different markets. Faced with falling consumption of potatoes, and the increased use of the crop as a loss-leader in supermarkets, Keogh and his team sprung into action, and his is a story worth listening to at the Checkout Conference.

Research Matters

The Checkout Conference is traditionally held up as an event that presents the latest data and insight from around the world - first - and the forthcoming event is no exception, with

representatives from three major research firms offering insight.

The rise of the 'digital native' consumer and the implementation of technology into the retail space are among the key themes to be addressed by Philip Benton of London-based Euromonitor International in what is certain to be a standout presentation. In addition, John Callan, country manager of dunhumby Ireland will examine the opportunities open to brands to develop personalised insights that tap into shopper needs, as data becomes more ingrained into the shopping experience.

Finally, Julian Baldwin, sales effectiveness director at Nielsen will look at the importance of customer engagement, and why retailers should challenge the everyday 'norms' in their businesses, and develop added-value solutions that don't merely borrow from what has gone before.

Secure Your Place

Tickets for the 2016 Checkout Conference are priced at €325 + VAT per ticket, inclusive of a three-course lunch in Fire Restaurant. Discounts available for multiple bookings.

Tickets can be purchased by contacting Colette O'Brien at 01 2365 823 or email colette.obrien@checkout.ie or alternatively via the Checkout website through our trusted ticket sales partner, Eventbrite. Visit www.checkout.ie for more details.

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Conference Timetable

Tuesday, 2nd February 2015

The Round Room, The Mansion House, Dublin 2

MORNING SESSION

8am - Registration

8.55am - Introduction by Stephen Wynne-Jones, Editor, Checkout

9.05am - Julian Baldwin, Sales Effectiveness Director, Nielsen UK & Ireland



Julian Baldwin has worked with Nielsen since 2010, previously leading Client Service and Business Development, launching new products for category and sales teams at Nielsen clients and building innovative partnerships with third parties to help clients grow. As Sales Effectiveness Director for Nielsen UK & Ireland, Julian leads teams of experts to help manufacturers and retailers convert shoppers into spenders. In his presentation at the Checkout Conference, Julian will examine why customer engagement should be at the forefront of retailer's mindsets as we head into 2016.

9.35am - Maggie Timoney, Managing Director, Heineken Ireland



Maggie Timoney has held the role of Managing Director Heineken Ireland since 2013. A seventeen-year veteran at Heineken, Maggie previously served as Chief People Officer at Heineken USA (since 2010), during a period that saw a significant turnaround in its business. Maggie previously fulfilled a range of leadership roles for Heineken in the Netherlands (2001-2006) and in the US, where she commenced her career in 1998 as National Sales Planning Manager. At the Checkout Conference, Maggie will explore why brands need to communicate added-value credentials, even in a promotion-heavy market.

10.05am - Andrew Yaxley, Chief Executive, Tesco Ireland



Andrew Yaxley was appointed chief executive of Tesco Ireland in March 2015. He joined Tesco in 2001 and prior to his arrival to these shores, he held the position of managing director of Tesco's London business. Prior to that, he held a number of positions in the commercial function at Tesco, as a member of the UK leadership team leading the Fresh and Packaged food divisions, as well as commercial operations in Slovakia and Czech Republic before that. He previously worked for Mars, in a variety of sales roles. With Tesco now in a period of transition, Yaxley will outline how the business is developing winning concepts that will help it build a more profitable future.

10.35am - Philip Benton, Research Analyst, Euromonitor International



Philip Benton is a Research Analyst covering the UK and Ireland FMCG markets at Euromonitor International. Philip joined Euromonitor in June 2013 and is responsible for monitoring key industry trends and issues within the UK. He also writes comment pieces, reports and analysis, which provide detailed insight into key drivers, trends and the state of FMCG industries within the UK. In his presentation, 'Coming of Age: Grocery Retailing in 2016 and Beyond', Philip will explore how the new, digitally-enhanced environment is changing the way we shop.

11.00am - Coffee Break

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Further information available at www.checkout.ie

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DAYTIME SESSION

11.30am - John Callan, Country Manager, dunnhumby



John Callan joined dunnhumby in 2008, heading up the group's Client Management business in Ireland. Since then, he has successfully set up the Tesco media @ dunnhumby platform, as well as launching numerous new insight solutions and capabilities in the market. John has been Country Manager for the Irish business since 2013. Throughout this time, he has successfully implemented a customer-first approach with Tesco and manufacturers, grown the team, established a new office and developed the dunnhumby business year-on-year. In his presentation at the Checkout Conference, 'The Forces and Trends Shaping Consumer Behaviour', Callan will examine why consumers are increasingly demanding simple, 'frictionless' solutions from retailers and brands, and what this means for brand development.

12.00pm - Simon Twigger, Trading Director, Poundland



Simon Twigger joined Poundland as Trading Director in September 2015. He joined from J Sainsbury plc, where his previous role was Managing Director of Sainsburys Local Stores. Prior to this, he held senior roles in trading at Sainsburys and Safeway plc. Including sales roles at FMCG suppliers, he has over 25 years' experience in Grocery retailing. He is also a trustee of the IGD and Grocery Aid. Poundland is the UK-based parent of the Dealz retail chain, which recently opened its 50th outlet in Ireland, on Thomas Street in Dublin.

12.30pm - Tom Keogh, Managing Director, Keogh's



In November, Tom Keogh was named Marketer of the Year by Marketing.ie, concluding a phenomenal year for both he and his brand. Keogh has been the driving force behind the creation of the Keogh's 'Grown with Love' potato brand - giving new impetus to what could be considered an Irish staple - and its extension into the gourmet crisps market. He has transformed the humble spud into a successful brand both in Ireland and in 14 countries around the world, and at the Checkout Conference, he will share his insight and plans for future brand growth. A must-see for small business owners.

1.00pm - Lunch in Fire Restaurant

AFTERNOON SESSION

2.30pm - Tom Fender, Director, him! international



Tom Fender, managing director of him! International, the 'authority on convenience shopping', will be hosting a very special presentation at the 2016 Checkout Conference, examining why the Irish convenience sector deserves to be considered the 'best in the world', featuring input from key players in the Irish c-store and forecourt industries. This not-to-be-missed segment will offer a detailed analysis of consumer attitudes to convenience retailing in Ireland and overseas, the secrets of successful convenience retailing, and what needs to be put in place maintain growth into the future.

3.15pm - Speaker To Be Confirmed

4.00pm - Conference Ends

About The Venue

The 2016 Checkout Conference will take place in the Round Room, at The Mansion House, Dublin 2, one of the capital's most recognisable buildings. It is a room that boasts plenty of history: on 21st January 1919, the First Dáil Eireann was convened in the Round Room and the Declaration of Independence was passed. Almost a century on, the Mansion House remains a popular and inspirational meetings and events space, and Checkout is delighted to host the 2016 Checkout Conference at this iconic and world-renowned venue.



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Plotting A New Course



Julian Baldwin, Sales Effectiveness Director at research firm Nielsen, believes that retailers and brands alike need to rethink their strategy when it comes to customer engagement, as the old rules, in many cases, no longer apply.

While consumer confidence hasn't been this high for seven years, the fact that consumer price increases remain subdued indicates that the consumer of today is a markedly different one to that which faced into the downturn. According to Julian Baldwin, Sales Effectiveness Director, Nielsen, brands that pin their hopes on positive sales emerging from increased consumer confidence are reading from a script that is no longer relevant - a whole new set of rules now apply.

Baldwin, who will be presenting during the Morning Session at next February's Checkout Conference, believes that many of the changes we have seen in the retail sector over the past 15 years are nothing compared to what is in store over the next three to five years, and business owners need to get up to speed with the key trends that will drive this new wave.

Personalisation

Chief among these is personalisation, which has been a longstanding facet of the

"Next time you are sweating over your range and assortment, trying to get the planograms right, remember that a retailer like Amazon boasts some 100 million products - just think of the planogram for that!?"

grocery industry - the local store serving its community - but is one that is increasingly being diluted by the spread of large retail groups and a wide variety of marketing channels. Baldwin believes that there is a need to embrace personalization once more, and points to the likes of Amazon as an example of how newer, more adaptable retailers are reshaping the landscape when it comes to customer engagement. He argues that personalisation is made more possible through the use of data, which can also help a store determine when and where a customer is likely to make a purchase. However, retailers should also exercise caution when developing a personalized offer - if you give off the impression that you know 'everything' about a particular customer, you may end up scaring them away.

Baldwin believes that we now have the infrastructure available to rewrite what 'loyalty' stands for in a retail context. To many shoppers, the concept of loyalty is encapsulated in a plastic card, or a monthly mailout of vouchers - it's something that hasn't changed in 20 years. With retailers increasingly competing on price, what loyalty stands for has been diluted, and there is a need to re-evaluate how loyalty can be used to drive sales.

'Big data' can enable retailers and brand owners to make smarter decisions in terms of personalisation and loyalty, provided they take the time to understand it better. The traditional model is broken, Baldwin suggests - historically, a retailer might have decided that the business needs to invest more in 'X', and a huge amount of capex is applied in order to drive the business in that direction.

Today, such is the fast moving nature of the sector, that by the time a retailer has achieved 'X', the world has moved on to something else. Rather than plough huge investment into the "next big thing", retailers and suppliers need to learn from the emerging crop of lean, efficient businesses and be able to move in time with the shopper, rather than follow in their footsteps. It's not just a case of adopting the "old normal" and putting new fascia on it. Building prototypes will be key, as those who decisively act with speed and continually learn and evolve will succeed as CPG continues to transform.

The New Battle

A lot of the discussion about retail growth in the past focused on traditional models - the "space race", for example - but this isn't where the future battles of retail will be won. Understanding your shopper's path to purchase and how they convert from a shopper to a spender is key. Next time you are sweating over your range and assortment, trying to get the planograms right, remember that a retailer like Amazon boasts some 100 million products - just think of the planogram for that! Range and assortment decisions are changing. Remember that online shoppers visit physical stores once in a while and understanding the role of both trips and how they can complement your range will be critical.

Baldwin encourages retailers to 'challenge the norms' and think of solutions that don't just revert to type, but actually add real value to a business by translating the boardroom to real shoppers.

Julian Baldwin will be presenting at 9.05am at the Checkout Conference. For ticket details or for further information, visit www.checkout.ie

Knowledge Is Power

As John Callan, Country Manager, dunnhumby explains, in a market where consumers increasingly 'need it now', the pressure is on retailers to deliver solutions that can compete with alternative purchasing channels.

preferences for frictionless solutions to be understood and met."

Younique

Social media and the championing of the 'self' is encapsulated by what Callan describes as the 'Younique' trend, which taps into the consumer desire to be seen, heard and acknowledged as an individual. Again, recent advances in technology have enabled brands and retailers to respond in meaningful ways to this trend, however this is not a necessity. "Whilst advances of technology have driven this trend, there are also plenty of examples of brands tapping into this trend in traditional retail environments," says Callan. "A local one that is top of mind is Nutella's partnership with Brown Thomas, whereby you can get own personalised jar of Nutella."

Need It Now

In addition, digital empowerment has led to the emergence of the 'need it now' consumer, Callan explains; a generation that will not accept delays or inconsistencies in quality or service. This has placed added pressure on retailers to deliver highly relevant, timely and tailored experiences, which ultimately rely heavily on customer data.

"Immediacy is no longer considered cutting-edge customer service, but rather a basic need; a 'hygiene' factor," he says. "Retailers and CPGs truly differentiate when they use real time insight to offer personalised experiences that surprise and delight consumers and evoke an emotional connection with the organisation or brand."

John Callan will be presenting at 11.30am at the Checkout Conference. For ticket details or for further information, visit www.checkout.ie



dunnhumby has long established itself as having its finger on the pulse when it comes to shopper habits; part of Tesco, the business is increasingly devoting attention to bringing insights to life and personalizing the customer experience.

At the Checkout Conference, John Callan, Country Manager, dunnhumby Ireland will explore a number of key themes that are affecting the retail space and how consumers interact with it - the foremost of which is the emergence of 'frictionless' experiences. Frictionless in this context means the ability to

deliver an easy, quick and simple solution to a consumer's needs, when and where they demand it - a prerequisite for the emerging 'digital native' consumer.

"As consumers actively seek ways to simplify their lives and save them time, the demand for frictionless solutions is set to grow," Callan explains.

"However the essence of what frictionless means for customers

will constantly evolve.

Competitive advantage will be achieved by those retailers or brands that anticipate and adapt to the changing needs of customers and establish new frictionless 'norms'.

"Although technology is a key driver of this trend, enabling superior and seamless multi-channel customer experiences, consumers expect their personal

"Competitive advantage will be achieved by those retailers or brands that anticipate and adapt to the changing needs of customers and establish new frictionless 'norms'."

Change For The Better



At the 2016 Checkout Conference, Philip Benton, Senior Research Analyst, Services & Payments at Euromonitor International will be examining how the industry needs to 'come of age' to meet the demands of the modern shopper.

Checkout: 2015 has been a somewhat 'mixed' year - on the one hand, consumer confidence is up, but on the other, the demand for value is as strong as ever. Where do you think the consumer mindset is at as we head into the new year?

PB: The UK and Ireland are very much following Germany's lead in terms of grocery retailing, with German consumers having always held high expectations in terms of value for money when buying their grocery shopping. The current climate is a hangover from the recession, food prices have consistently declined for the past two or three years and fire sales such as 'Black Friday' have meant that consumers expect low prices for products all year round. Consumers are much more adept at recognising the value of products. I expect consumers will be prepared to spend more in 2016 whilst still retaining the 'value for money' mindset.

Checkout: There has been a lot of discussion about the

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emergence of the 'digital native' customer - the next generation of shoppers that will arguably have higher expectations than ever before. How prepared are brands - particularly long-standing ones - for this shift, do you think?

PB: Embracing social media is the key to brands meeting the higher expectations of the 'digital native' customer. Twitter is a key customer service tool: consumers expect a response within an hour of tweeting about a brand - whether it's positive or negative - and those brands with an established platform are best prepared for this shift. Facebook is becoming an increasingly important tool, and not just in terms of brand marketing. It will also be a key

eCommerce driver once Facebook Shopping is fully operational. A lot of brands have appointed a digital strategy team to identify the future opportunities that the 'digital native' customer will bring. I think this is crucial to preparing for the shift and I would worry for long-standing brands that don't currently have this in place.

Checkout: Your conference presentation will focus on 'Coming of Age: Grocery Retailing in 2016 and Beyond' - do you think the grocery sector is more sluggish than other retail sectors in 'coming of age'?

PB: Euromonitor estimates that the grocery sector (packaged food) is the fourth biggest online sector in the UK; behind apparel,

consumer electronics and media products. The fast fashion movement has been a major contributor of the apparel sector's success, fronted by pure online players such as ASOS. One of the main drivers of this success has been the ease and convenience of delivery/returns. Consumers' expectations of deliveries in the online grocery sector will be high as a result of the launch of Amazon Fresh, and it is critical that the wider industry is able to respond if they want to stop Amazon monopolising the online grocery market.

Checkout: We are often told what the 'next big thing' is going to be in retail - convenience, lower SKU count, click and collect - but as you look forward to the end of the decade, what do you see as the game changer?

PB: I think the 'Internet of Things' is going to be the theme of next decade with smartphones continuing to be the portal to online growth. Amazon has already launched Amazon Dash in the US, which allows consumers to replenish products when they are low on stock at the push of a button. It is likely that consumers will soon be able to order food via their fridge, laundry detergent via the washing machine and even toothpaste via their toothbrush. This will completely change the dynamics of the relationship between consumers and brands. Wearable technology is also gamechanging: virtual reality headsets such as Oculus Rift would allow consumers to virtually shop within the comfort of their own home and potentially never have to step foot in a supermarket again.

Philip Benton will be presenting at 10.30am at the Checkout Conference. For ticket details or for further information, visit www.checkout.ie