





p!

CONNECTING  
BRANDS  
TO CONSUMERS

OUR COMPANY

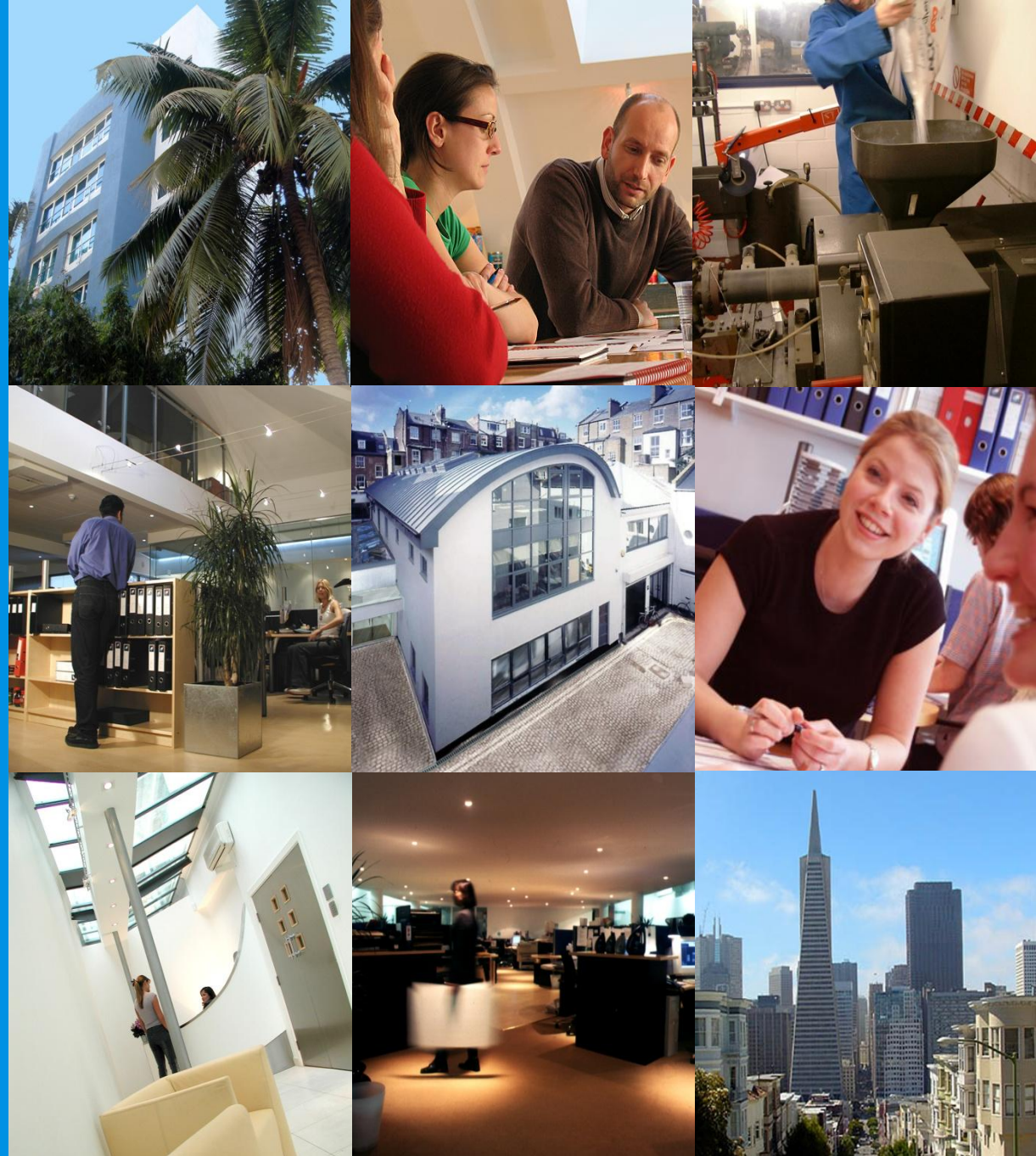
ph





## WHO WE ARE

- established in 1984
- three regional hubs in Asia, Europe, North America
- multi-national, multi-cultural teams across 5 brand units
- experts from a wide range of disciplines and backgrounds







## WHAT WE ARE

- experts in consumer and healthcare brand-triggering, visual brand id and brand expression at every brand/consumer touch-point
- focused on facilitating sustained commercial brand growth
- a business based on relationships not projects



## 5 BRAND UNITS





# pi!brand

## ICONISTIC® BRAND ID

- integrated branding strategy, creation and optimisation
- real world, iconistic® brand id, range architecture and pack design focused on rapid / improved brand salience and recall
- 25 years experience of major global, regional and local consumer and healthcare brands
- branding solutions for all consumer touch-points

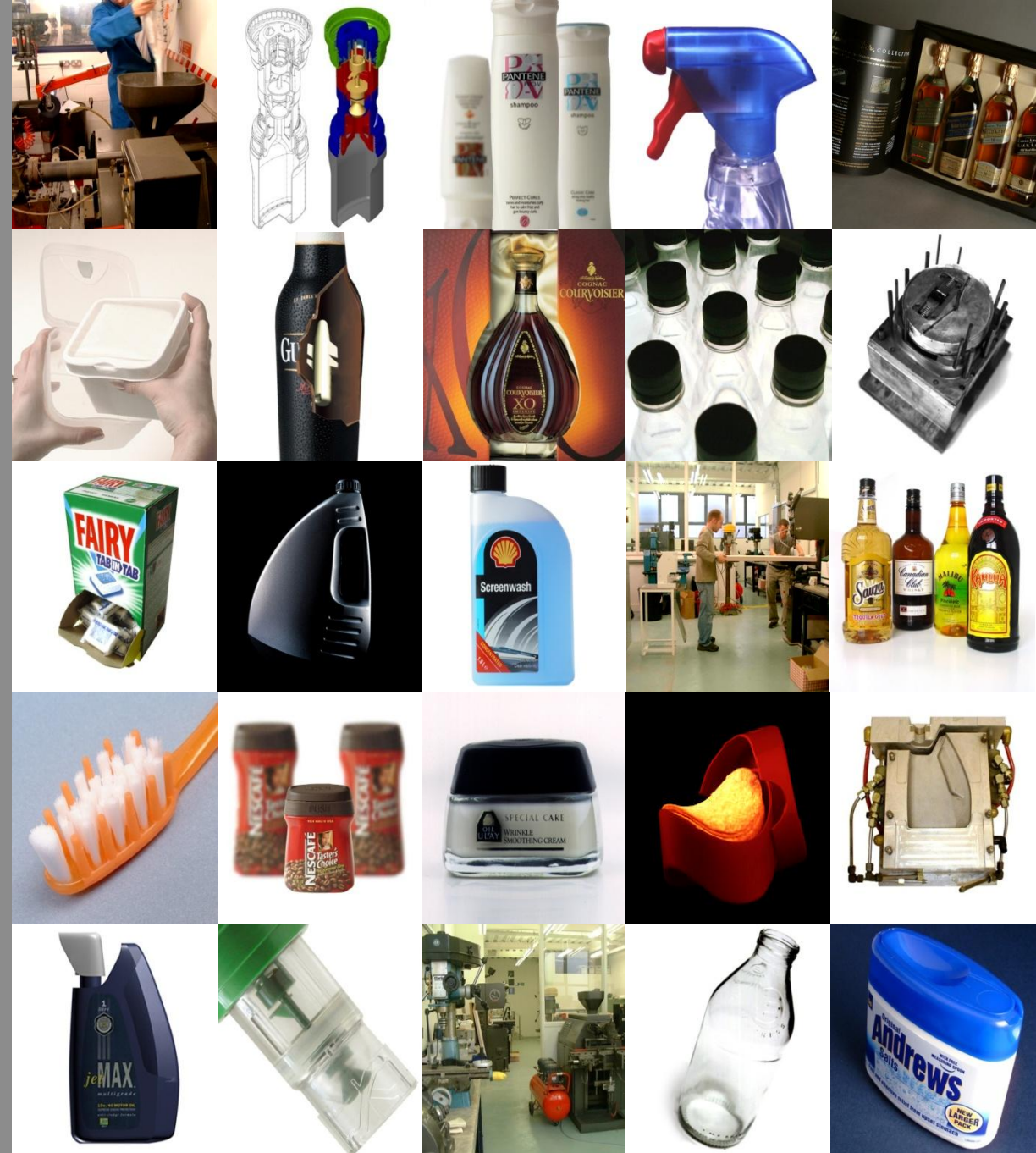




## CREATIVE BRAND ENGINEERING

- envelope pushing consumer and healthcare structural design
- mechanical engineering
- production risk analysis and cost modelling
- rapid prototyping through 'pilot'
- factory production audits
- 'real-world' production consultancy
- testing labs
- full in house structural production facilities including:

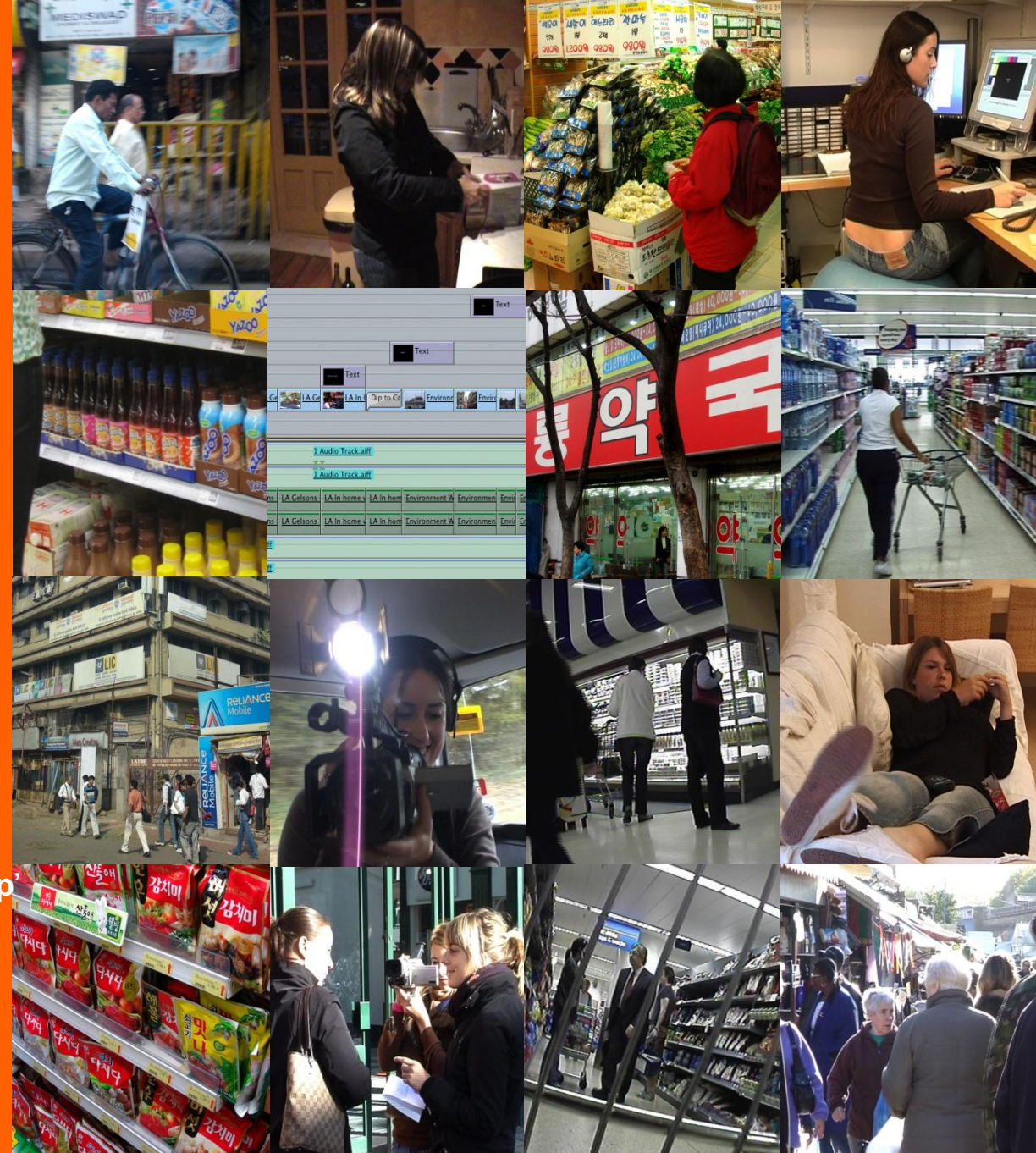
extrusion blow moulding, P.E.T. injection stretch blow moulding, injection moulding, vacuum forming, pressure forming, resin casting, solid and surface CAD modelling, CNC milling, CNC lathing, digital substrate printing, laser carton cutting, performance testing equipment





## REAL WORLD BRAND INSIGHT

- consumer / brand relationship analysis
- understanding what consumers do, not what they say they do
- market immersion and analysis
- covert consumer observation, filming and analysis
- covert retail observation, filming and analysis
- in home usage observation, filming, discussion and analysis
- vox-pops - post shopping on street interviews
- shopping script identification
- pack decoding and shelf performance analysis through 'pickup
- brief formulation





## INNOVATIVE BRAND INNOVATION

- inspiring individuals for personal inspiration
- tailored programmes to solve specific problems
- insights driven idea generation
- new brand / product innovation / development
- new brand ideation, positioning and foot-printing
- new brand development / new product development
- collective debate within a virtual community
- expert approach – playing to peoples strengths
- technology based innovation model





## ICONISTIC® BRANDING IN STORE

- full leverage of visual brand equity
- cohesion of design principles
- focus on brand salience
- full control of brand identity
- dramatic in-store presence
- creative design and consultancy





## THE BRAND MUSEUM

- probably the largest collection of branded packaging, advertising and ephemera in the world
- a constantly changing exhibition of over 10,000 items on display, chosen from a collection of approximately 1,000,000 items
- charts the history of brands since the 19th century and provides clues to the future
- unique conferencing facilities



THE MUSEUM OF BRANDS, PACKAGING AND ADVERTISING





CLIENTS







## CLIENTS - CPG





## CLIENTS - HEALTH

**RECKITT  
BENCKISER**




 **MERCK**

 *BioSpace*<sup>®</sup>

 **AMO**

 **Pfizer**

 **inverness medical innovations**

 **gsk** GlaxoSmithKline

 *Aventis*

**AstraZeneca** 

 **Roche**

 **Yamanouchi**

 **BOOTS HEALTHCARE INTERNATIONAL**

 **Lilly**

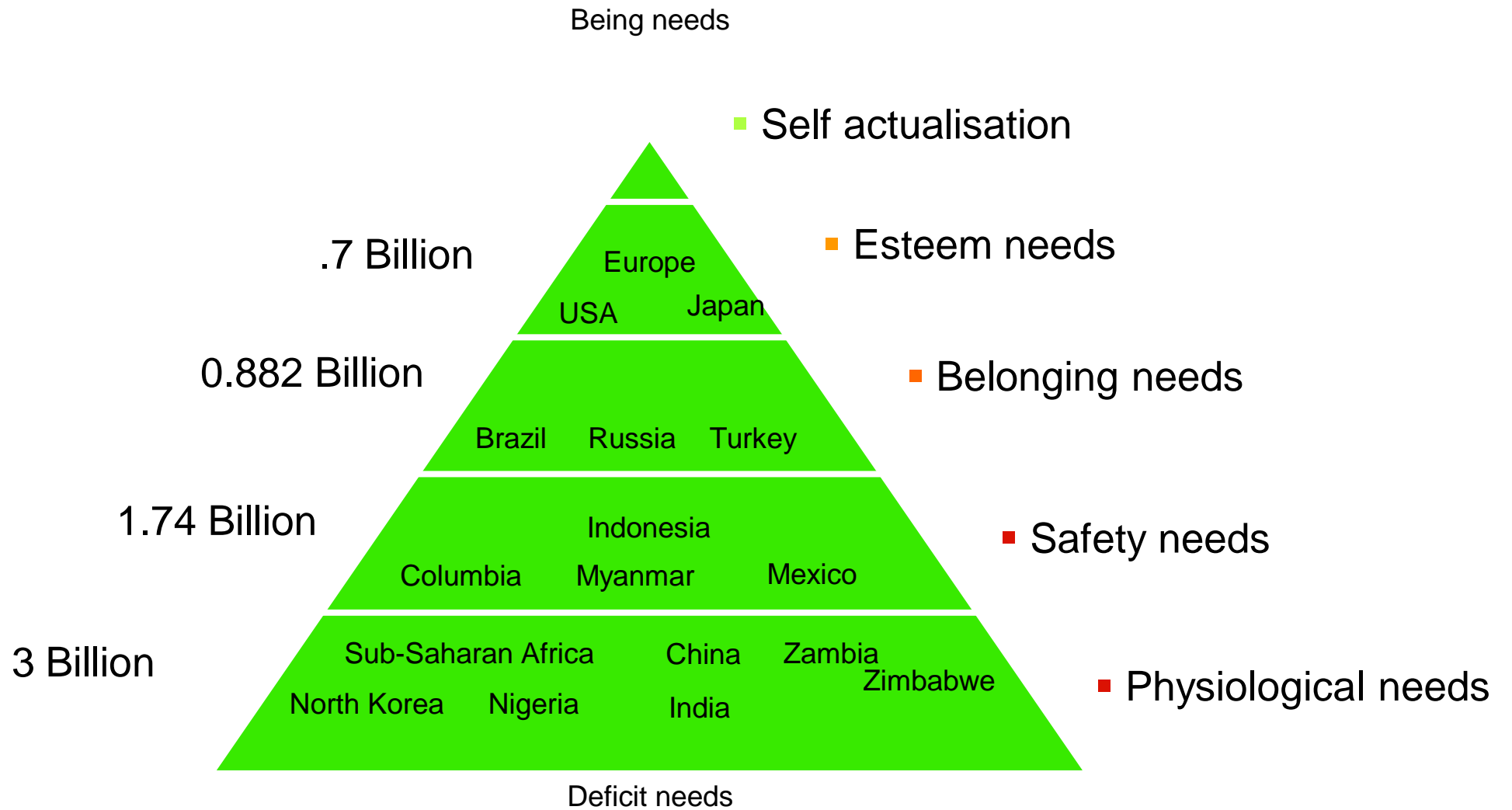
 **NOVARTIS**





remake:remodel

# the brief



6.3% of the worlds population own 50% of its economic product



...how do we rescue over half the planets  
population  
from the medieval ages without destroying  
the planet?

# research phase

- Behavioural Change
- Technological Change



picu

focused on what consumers do - not what they say they do





# Behavioural Change

- information everywhere
- democratisation
- asymmetrical ethics

# Behavioural Change

- “you can fool some of the people...”
- “I did it my way...”
- “what you don’t know can hurt you”

- **Global culture will become more complex**
- Virtuality will deliver unique spontaneous cultural meme's
- Super niche cultures and collectives will become viable through the web-providing new opportunities.
- Democratising technology will move from electronics to mass manufacture





- **Consumer attitudes driven by**
  - Need for authenticity-giving opportunities to start-ups
  - Fast appearing global brands meeting authenticity needs
  - Consumers are seeking alternative retail models-e.g. ebay
  - ‘Anarchos’ - people are becoming specifiers not consumers
  - National pride drives Asian (and Chinese) global brand emergence
  - Consumers still associate with success allowing brands to morph across categories and industries e.g. Apple, Virgin

authenticity



specifiers



brand morphing



emergence

- **The sense of community will evolve driven by**
- Improved peer to peer communication allowing like minds to find one another and group.
- Ethical drivers will balance materialist drivers
- Fundamentalism of all forms will drive liberal reactions ( middle east 1980's)
- The global rise in education will increase local emancipation

ethics



security



# Technological Change

- Closed loops
- Autonomy
- Decentralisation



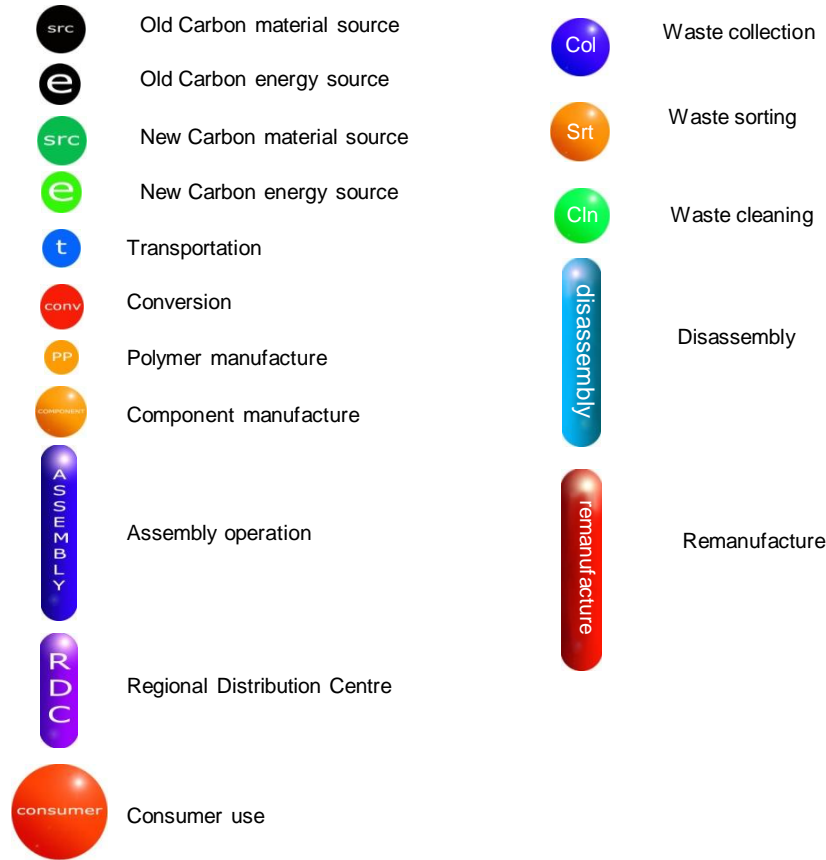
# Technological Change

- ...going round in circles
- ... intelligence everywhere
- ...move China next door

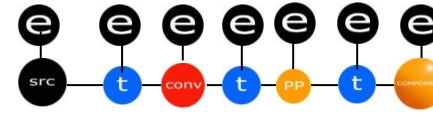
The conventional linear manufacturing paradigm is resource and energy inefficient.

Closed loop systems offer significant resource savings and energy savings

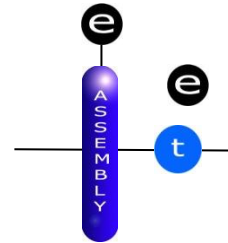
A typical trigger pump consists of circa 10 components each produced by a series of linear manufacturing steps .  
Each step is represented by a symbol



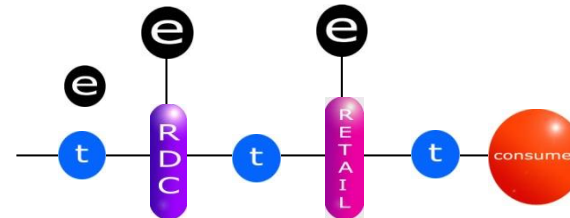
Component model



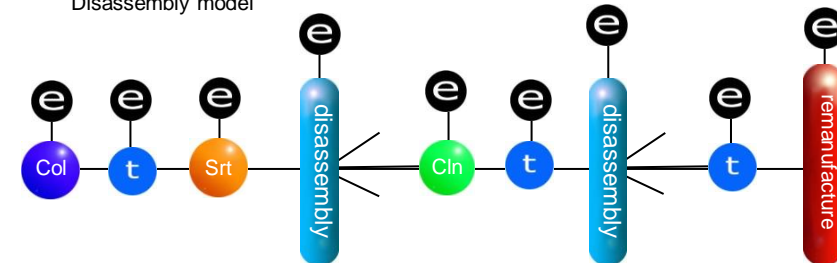
Assembly model



Distribution model



Disassembly model



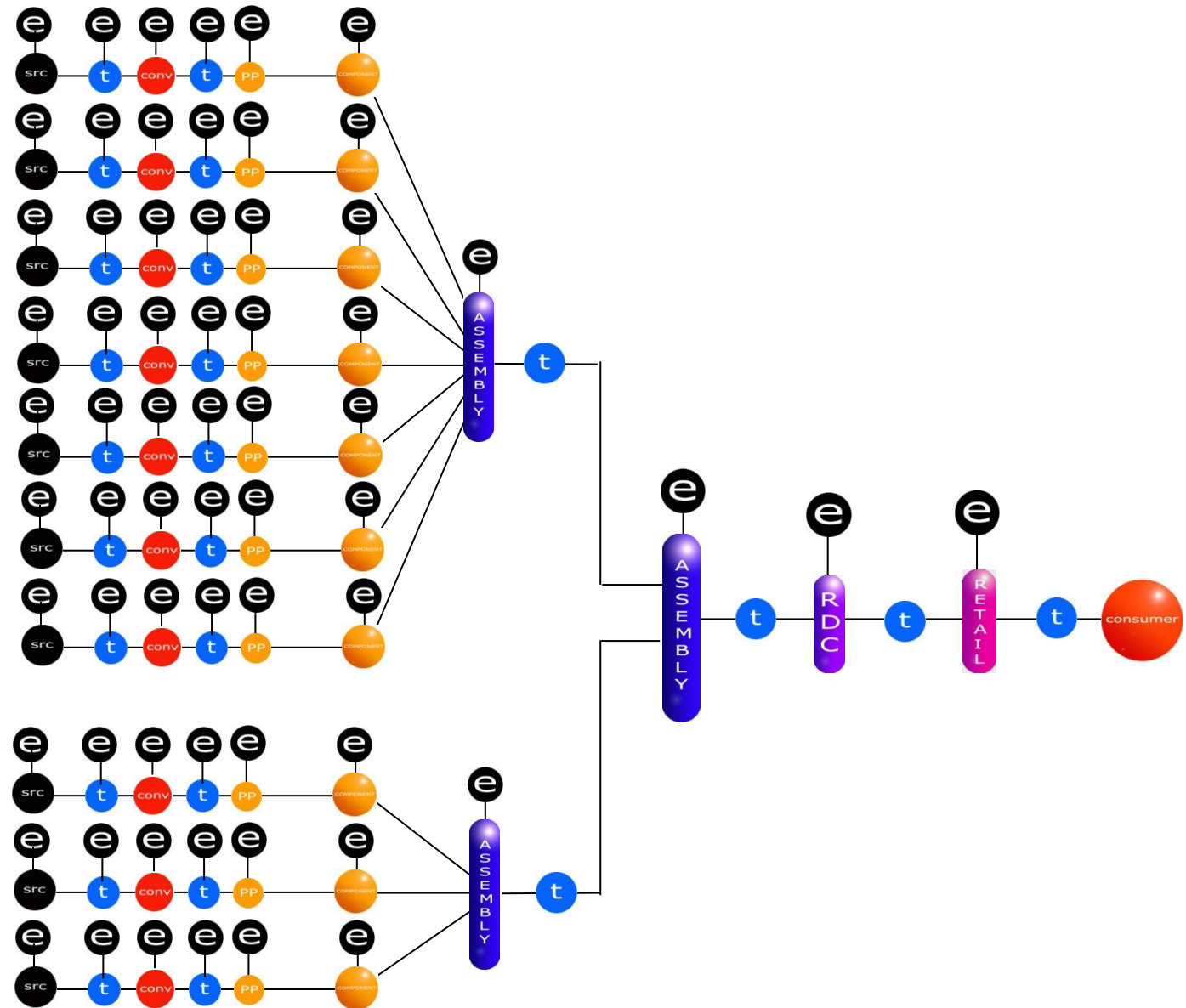


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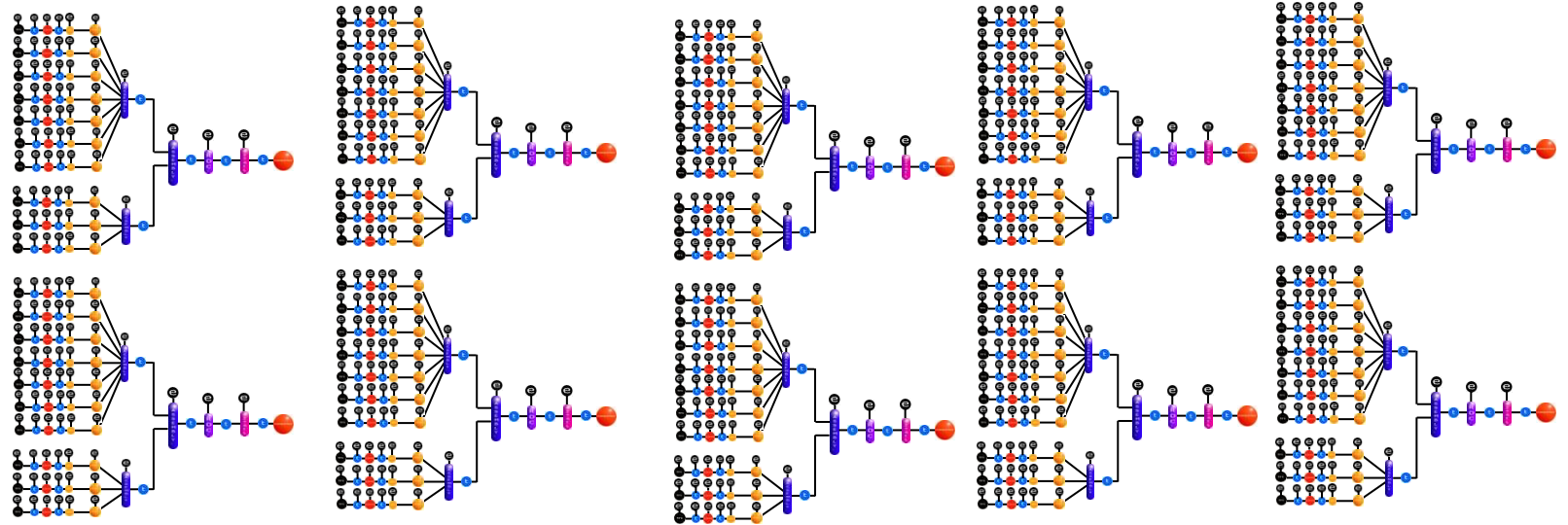
pump

bottle

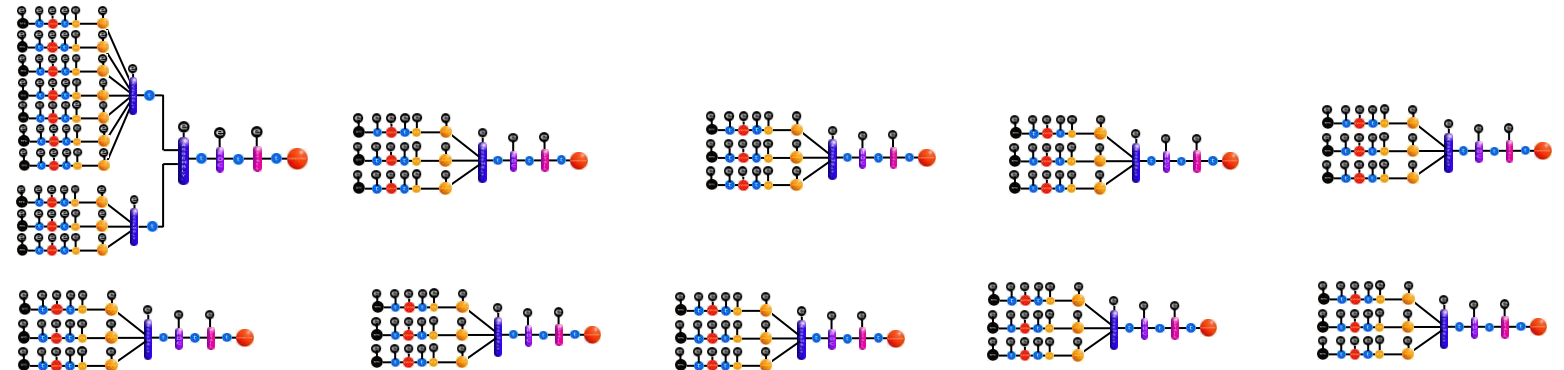




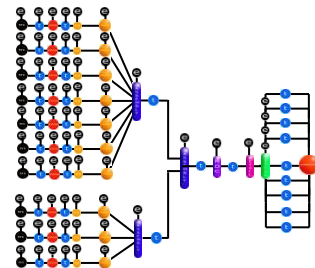
Conventional 'linear' manufacture x10 purchases

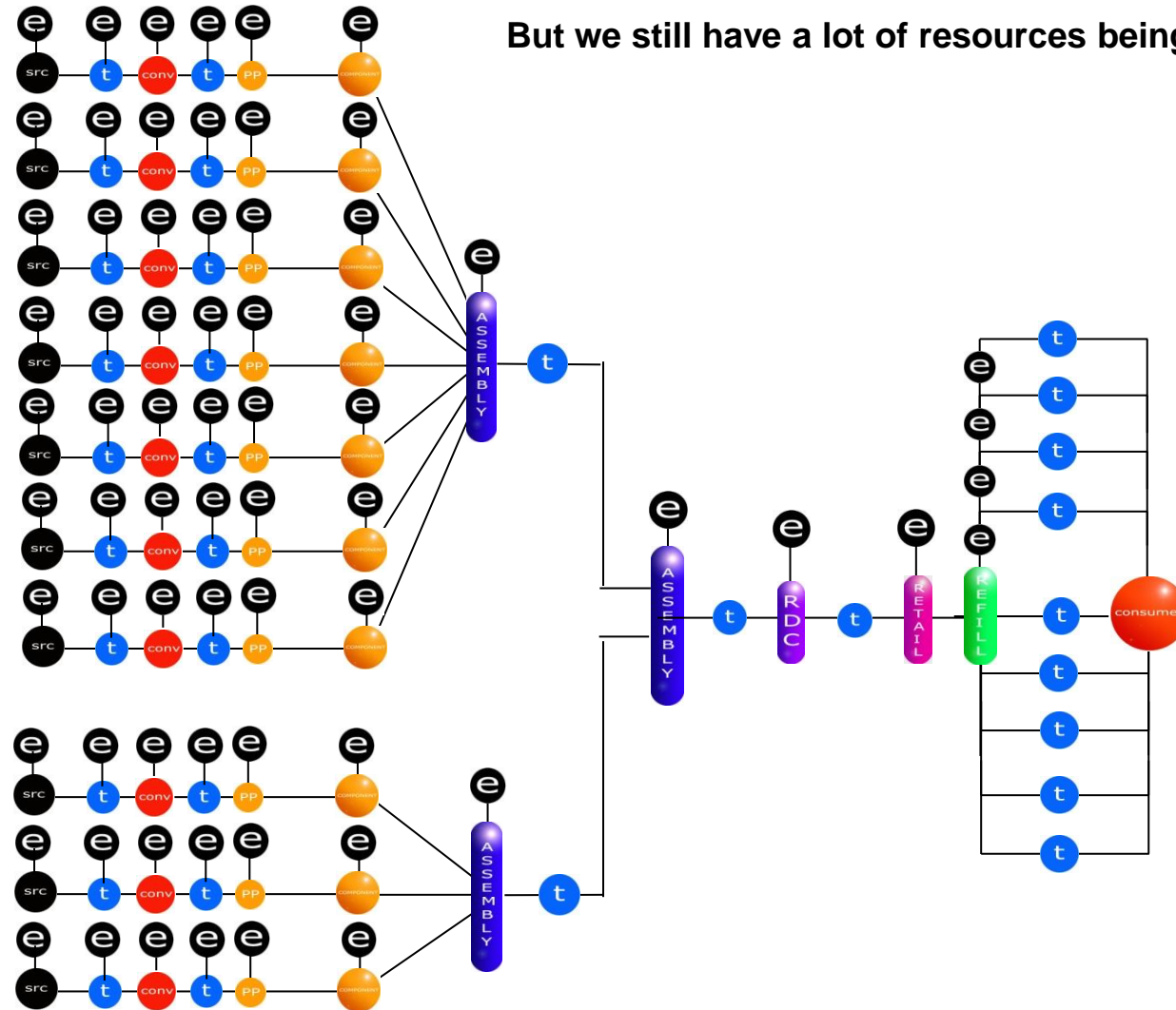


Refill bottle x10 purchases

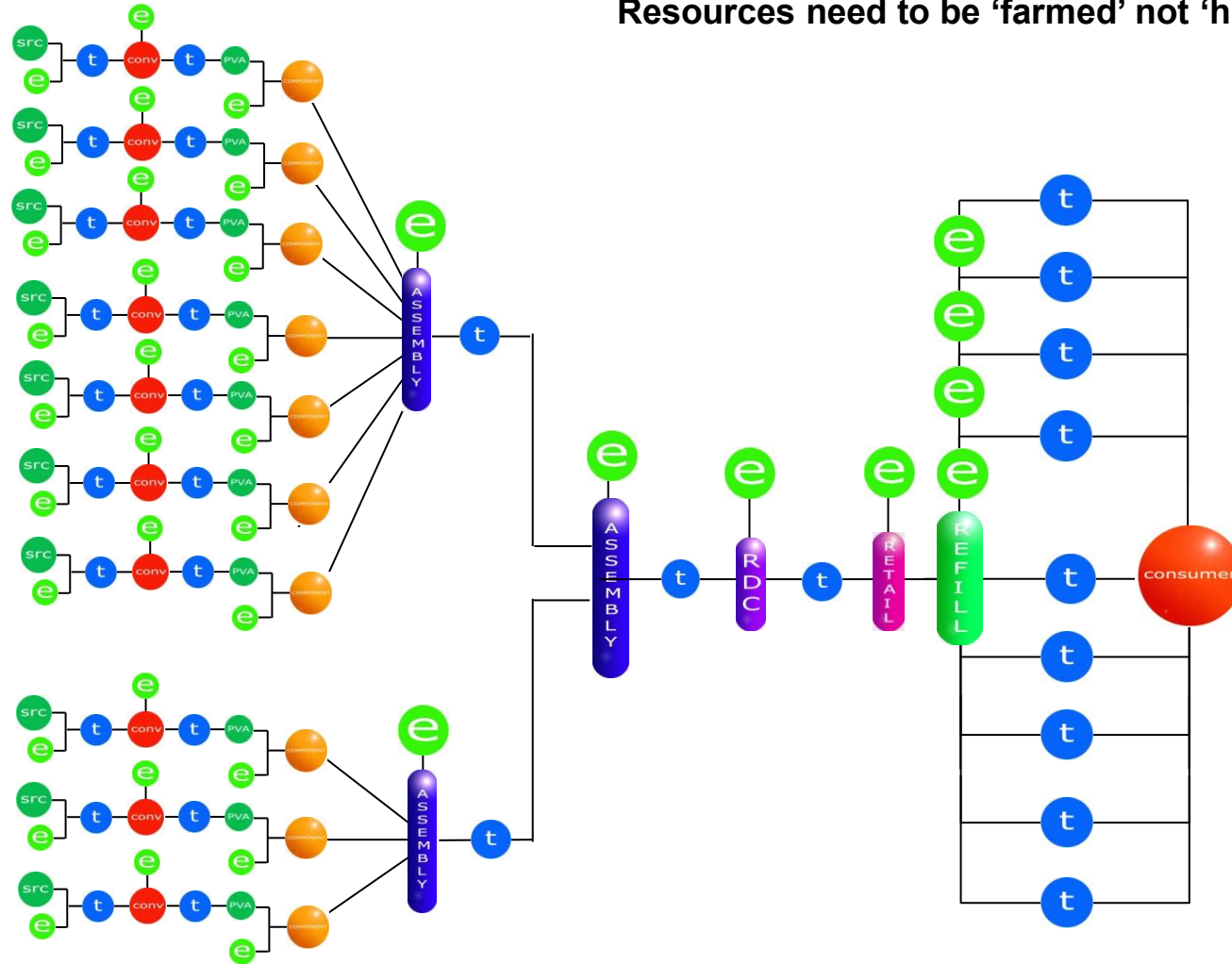


In-store Refill x10 purchases





Resources need to be 'farmed' not 'hunted'





# The impact of closed loops

The worlds smallest sustainability modeller

$$Si = ((\sum R + \sum E)/\lambda)/f$$

Impacts achievable

Mass reduction – circa 30%

Recycling materials - circa 50%

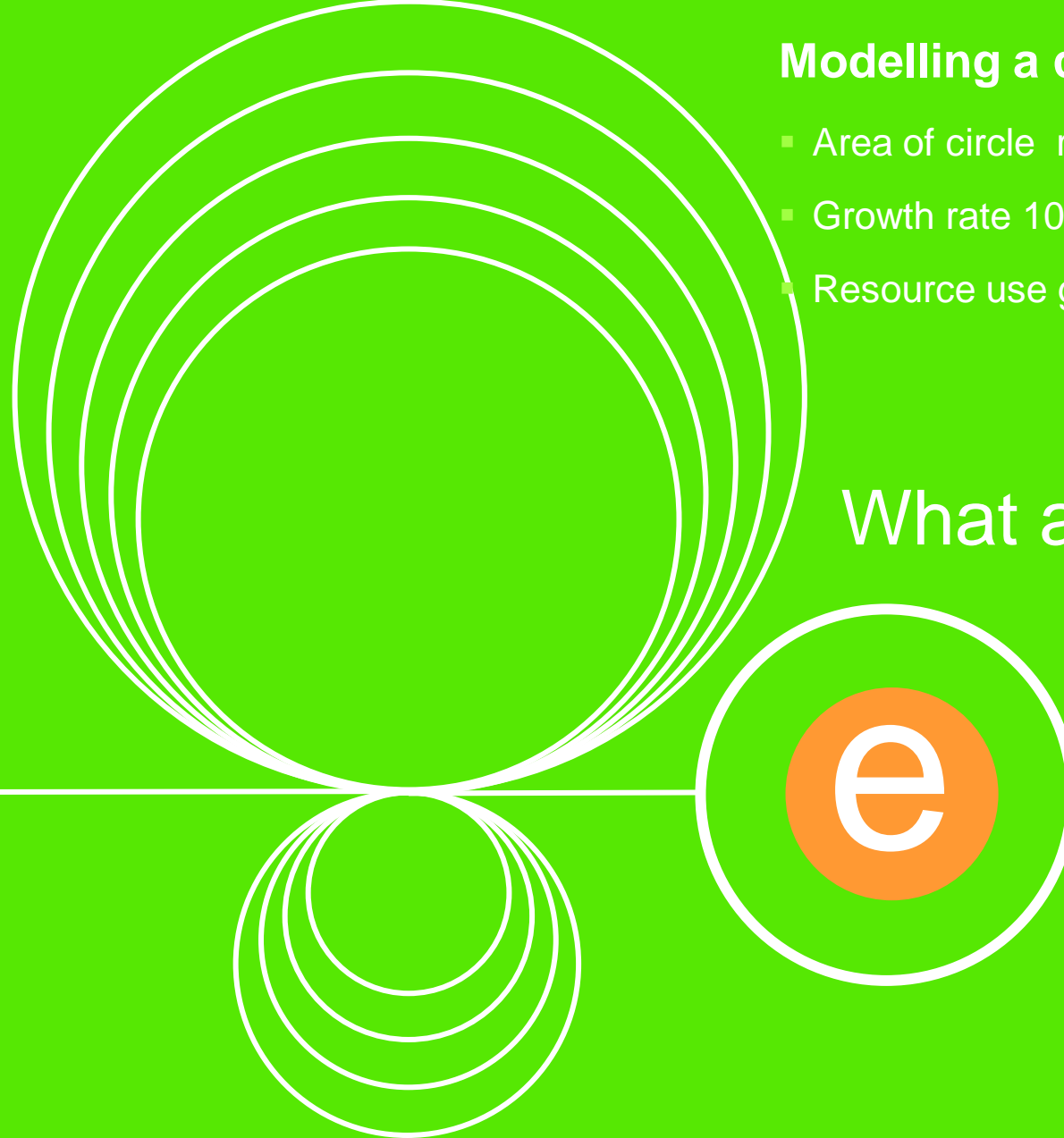
Closed loops – circa 90%

Closed loops consistently  
outperform  
alternative methods

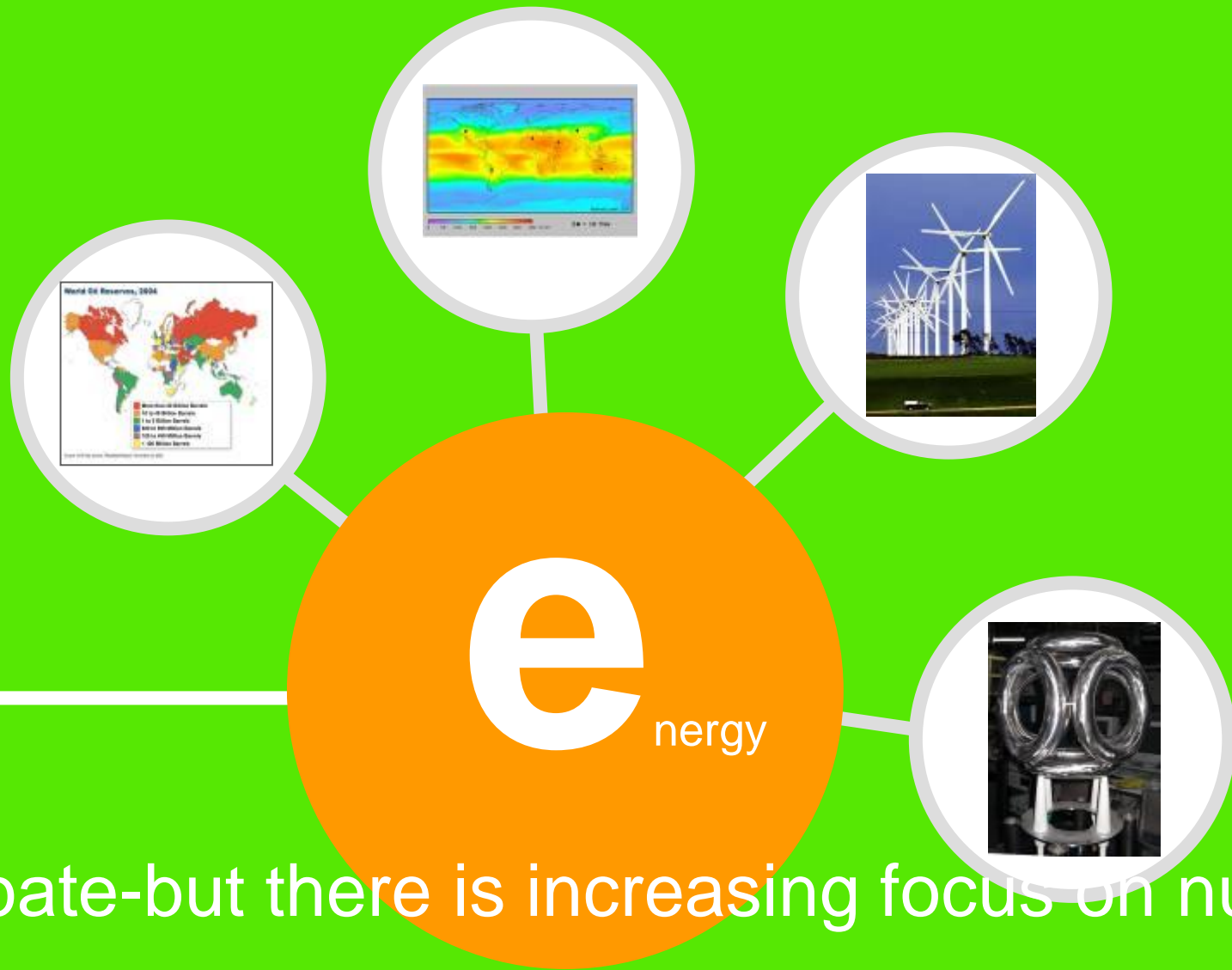


## Modelling a closed loop Economy

- Area of circle represents economy
- Growth rate 10% y.o.y.
- Resource use growth circa 1-2%



What about energy?



It's still a debate-but there is increasing focus on nuclear and Renewables and investment is following esp in BRIC



True closed loop methods allow continual long term growth  
and the potential to achieve our objectives

But this demands new technologies and methods.

Where are these to come from?



# Technological Change

- ...going round in circles
- ...intelligence everywhere
- ...move China next door

## NewScientistTech

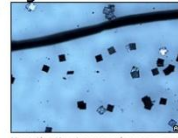
Last Updated: Friday, 23 February 2007, 13:23 GMT

E-mail this to a friend

Printable version

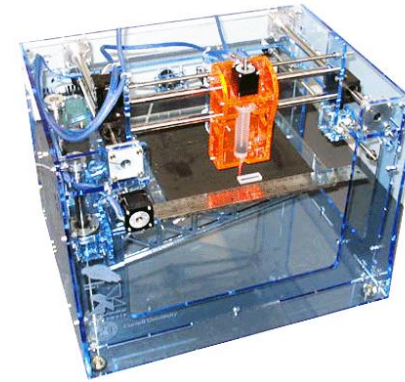
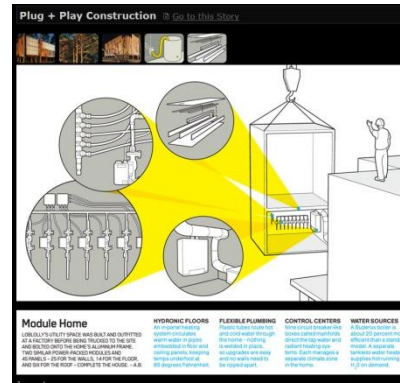
### World's tiniest RFID tag unveiled

The world's smallest radio frequency identification tags have been unveiled by Japanese electronics firm Hitachi.



The minute devices measure just 0.05mm by 0.05mm (0.002x0.002in) and to the naked eye look like spots of powder.

They are thin enough to be embedded in a sheet of paper, Hitachi spokesman Masayuki Takeuchi says.



## POLY IC

The chip printers



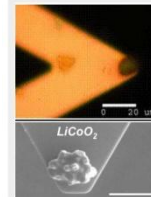
Friday, February 16, 2007

### Self-Assembling Batteries

By measuring nanoscale forces, researchers learn to make lithium-ion batteries that pull themselves together.

By Kevin Bullis

Print E-mail Share »



Researchers attached tiny particles of battery electrode materials to an atomic-force microscope to precisely measure how they attract or repulse other materials. Using this information, the researchers were able to choose materials that, when combined, sort themselves into useful structures, such as batteries. The bottom image's scale bar is 10 micrometers. Credit: Yet-Ming Chiang

Researchers at MIT have designed a rechargeable lithium-ion battery that assembles itself out of microscopic materials. This could lead to ultrasmall power sources for sensors and micromachines the size of the head of a pin. It could also make it possible to pack battery materials in unused space inside electronic devices.

Yet-Ming Chiang, a professor of materials science at MIT, and his colleagues selected electrode and electrolyte materials that, when combined, organize themselves into the structure of a working battery.

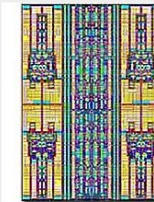
Monday, February 12, 2007

### Building the Cortex in Silicon

Models of the brain built from specially designed computer chips could reveal the secrets of our cerebrum.

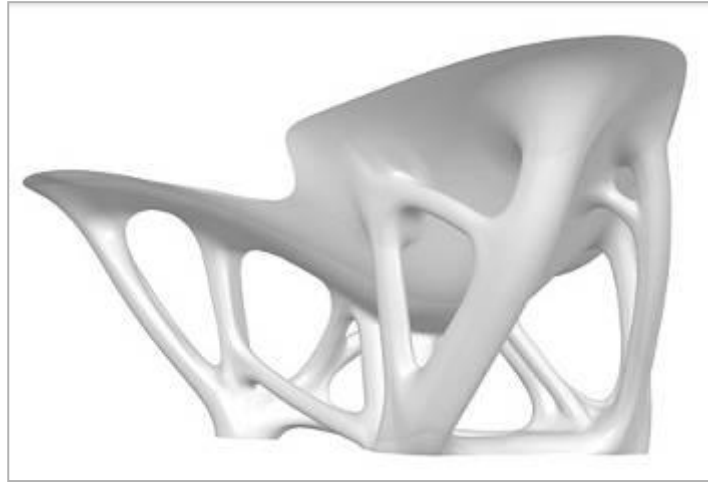
By Emily Singer

Print E-mail Share »



Silicon chips built to resemble the brain could shed light on its computational power. Credit: Joseph Lin

An ambitious project to model the cerebral cortex in silicon is under way at Stanford. The man-made brain could help scientists understand how the most recently evolved part of our brain performs its complex computational feats, allowing us to understand language, recognize faces, and schedule the day. It could also lead to new neural prosthetics.



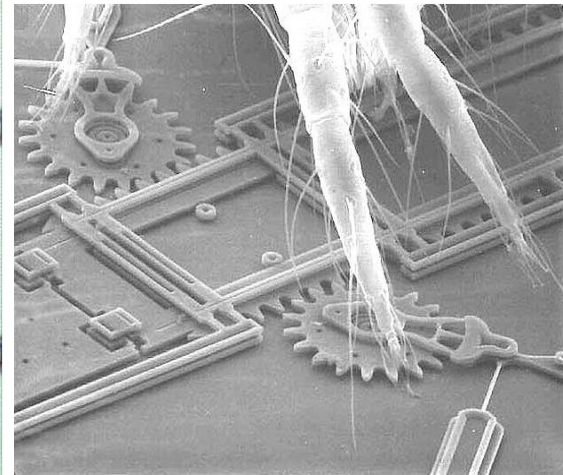
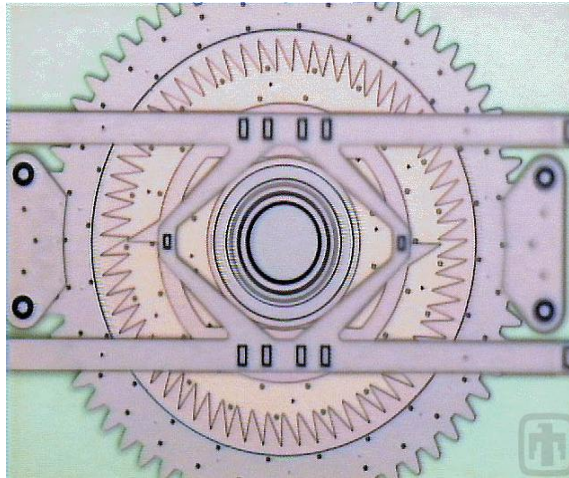
- Design is becoming increasingly automated extending its usability and efficiency.
- Genetic algorithms applied to design development create unique solutions with improved performance.
- The user defines performance constraints for the new design rather than design the object- a method that can be extended to non-specialists.

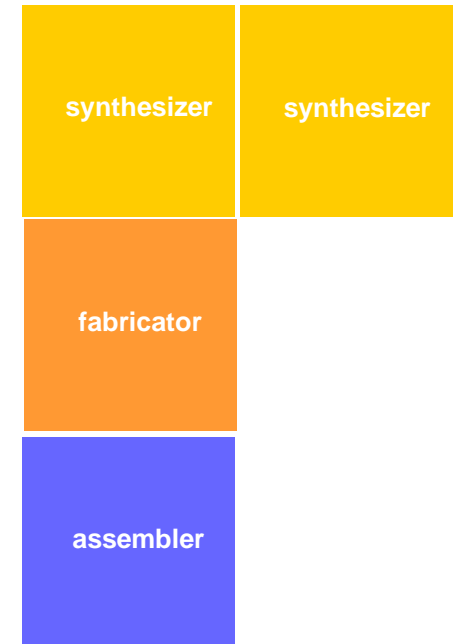
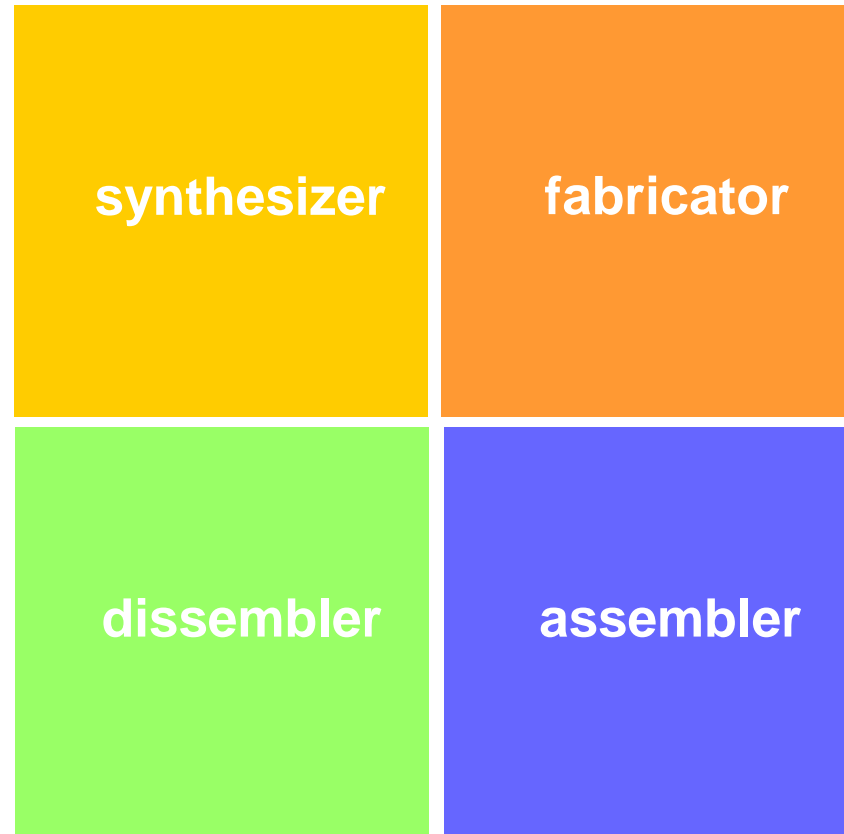
# Technological Change

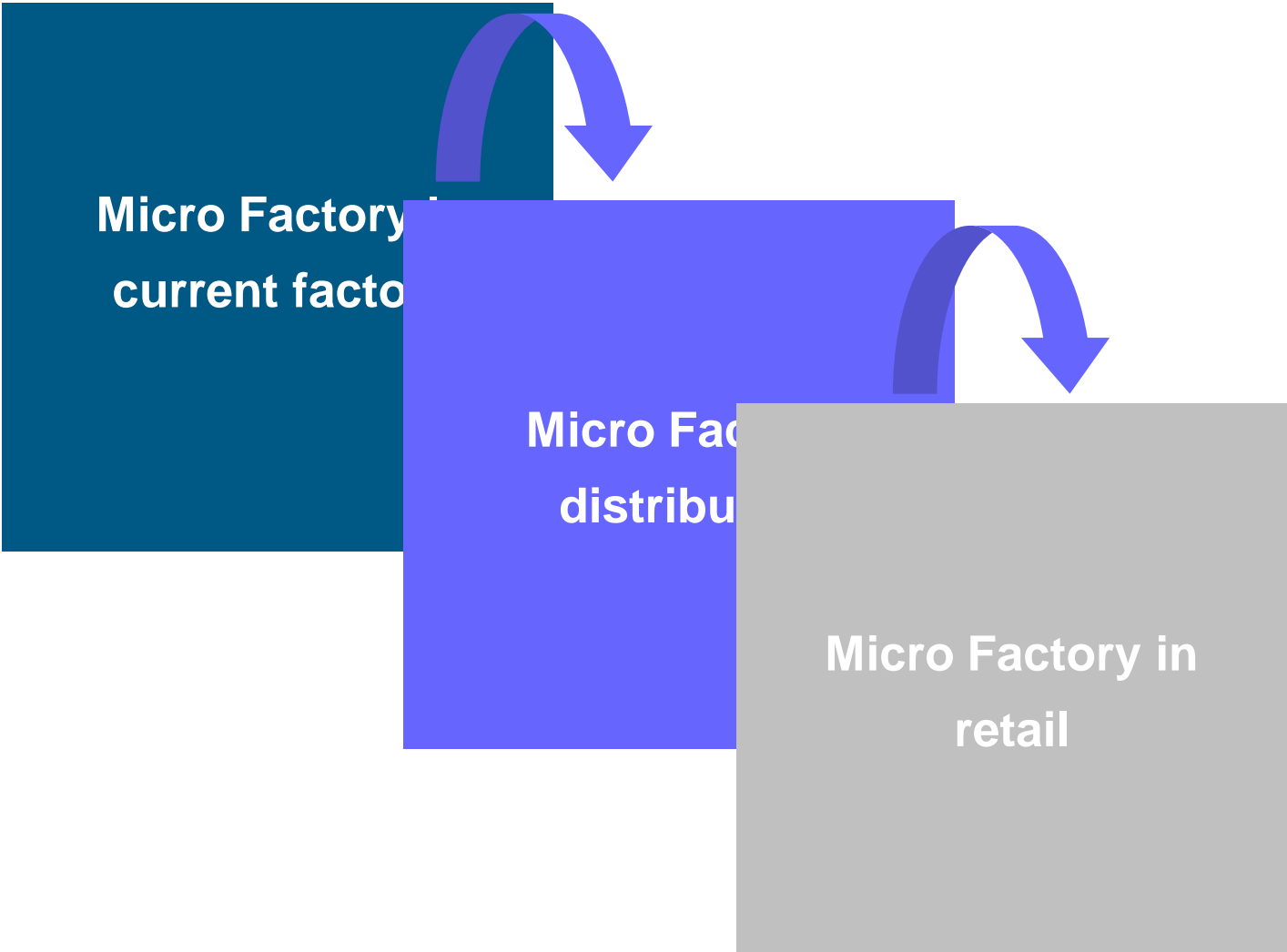
- ...going round in circles
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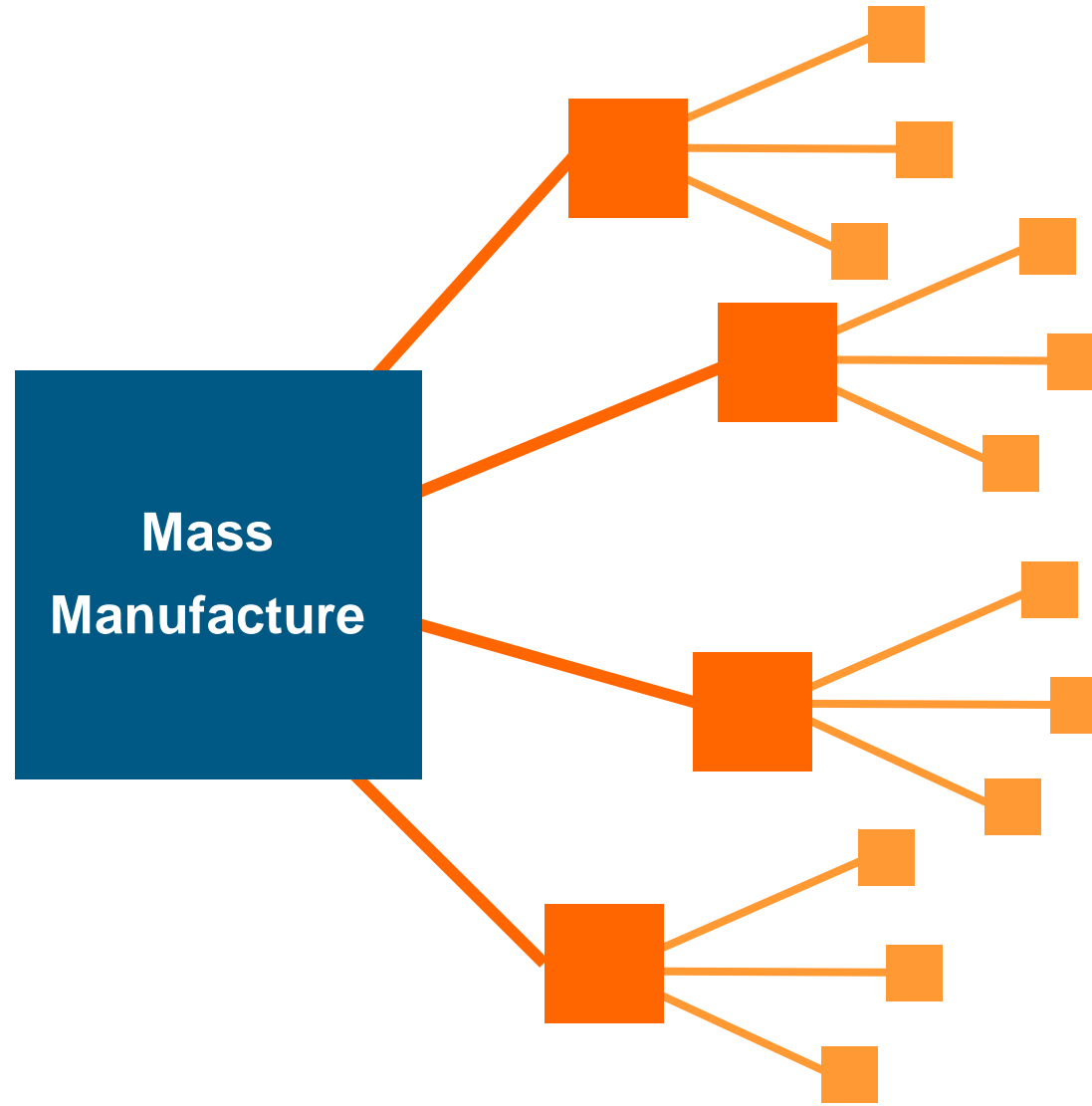


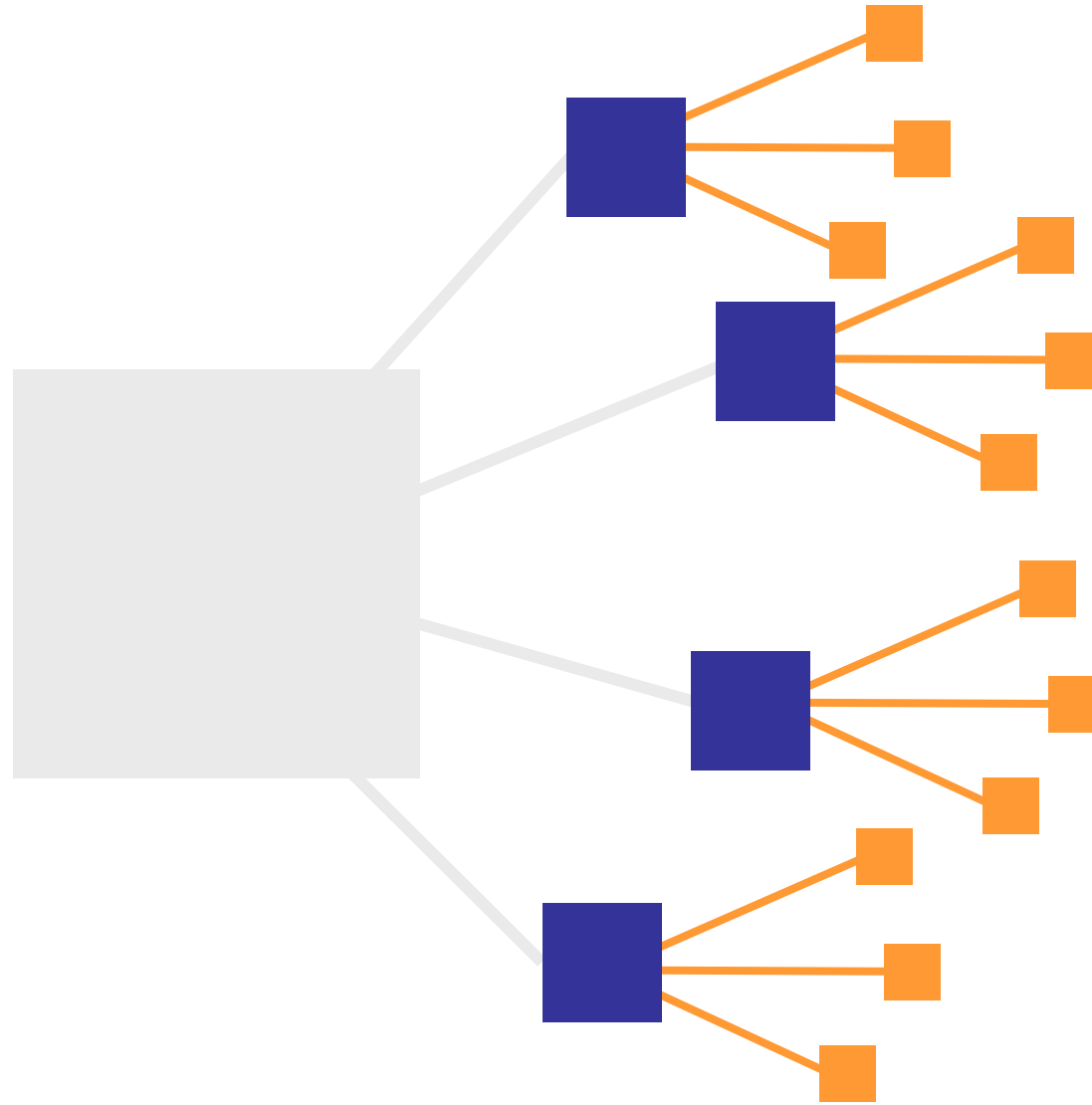
## TOMI MiniFactory



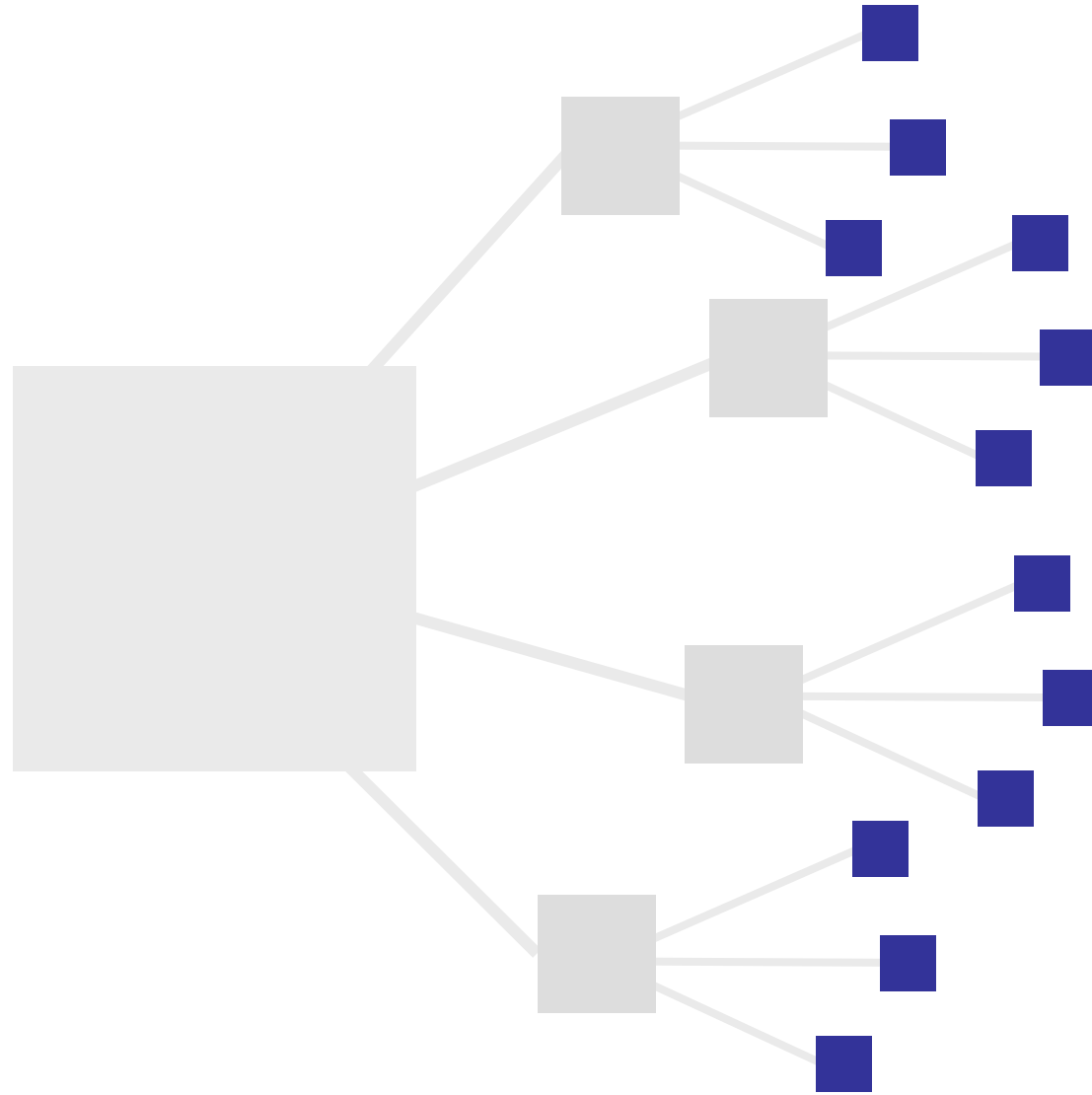


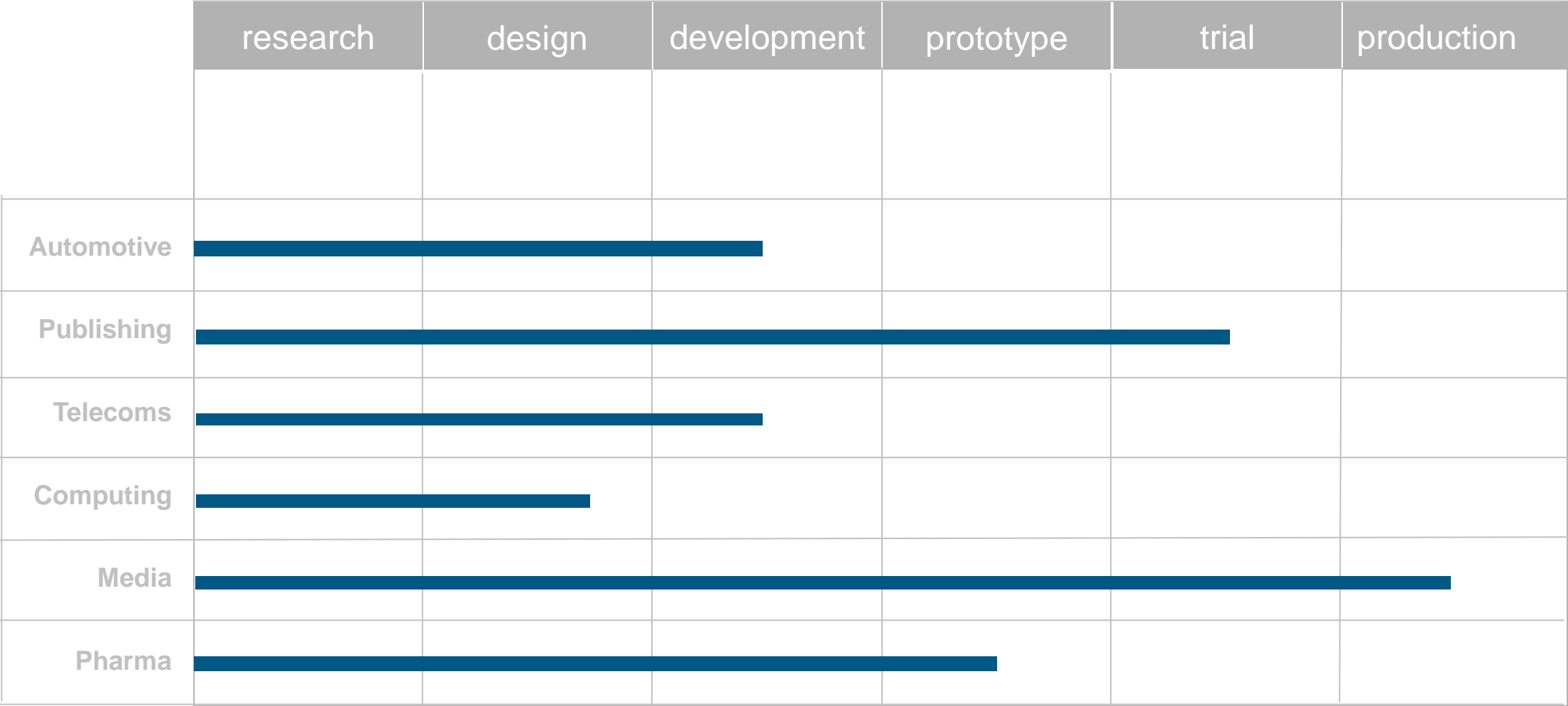


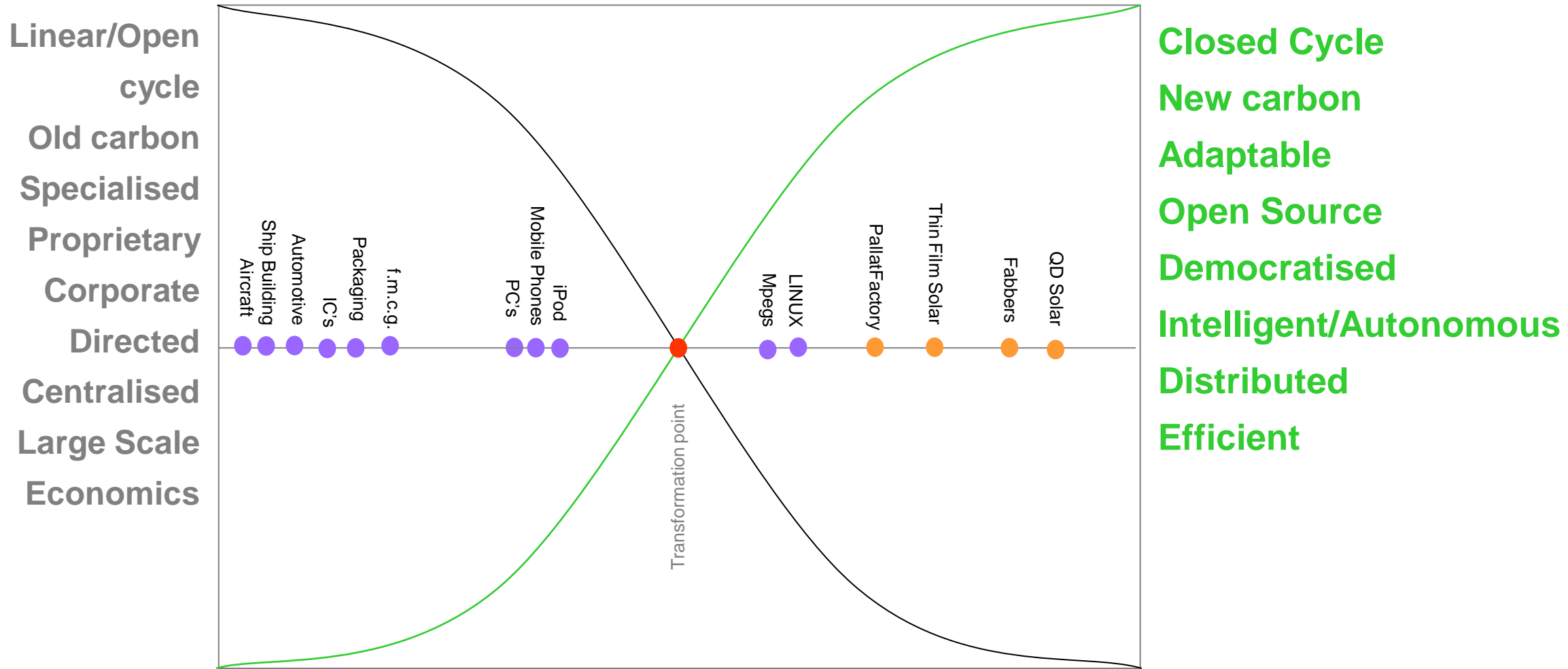












# explorations

# distributed manufacture v 0.5

Also known as in-store refilling



# What is the history?



2000

2007

All materials shown remain the copyright of the PI Group and are not for distribution

The In-store system development extended to Shanghai.  
PI Group's concept development of the principle continued to include consumer customisation and  
The 'my brand' principle

## Test in less developed market

- Following the success of the High Wycombe test the concept was tested with consumers in Shanghai
- The results showed almost identical results to the High Wycombe trial irrespective of the sophistication of the consumer base

Copyright - Wisdom Systems 2004

27

## E Wash Machine



Copyright - Wisdom Systems 2004

28

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The Shanghai test demonstrated the same benefits to brand performance and consumer satisfaction. This is a universally preferred alternative to conventional packaging.

# Where are we today...brand

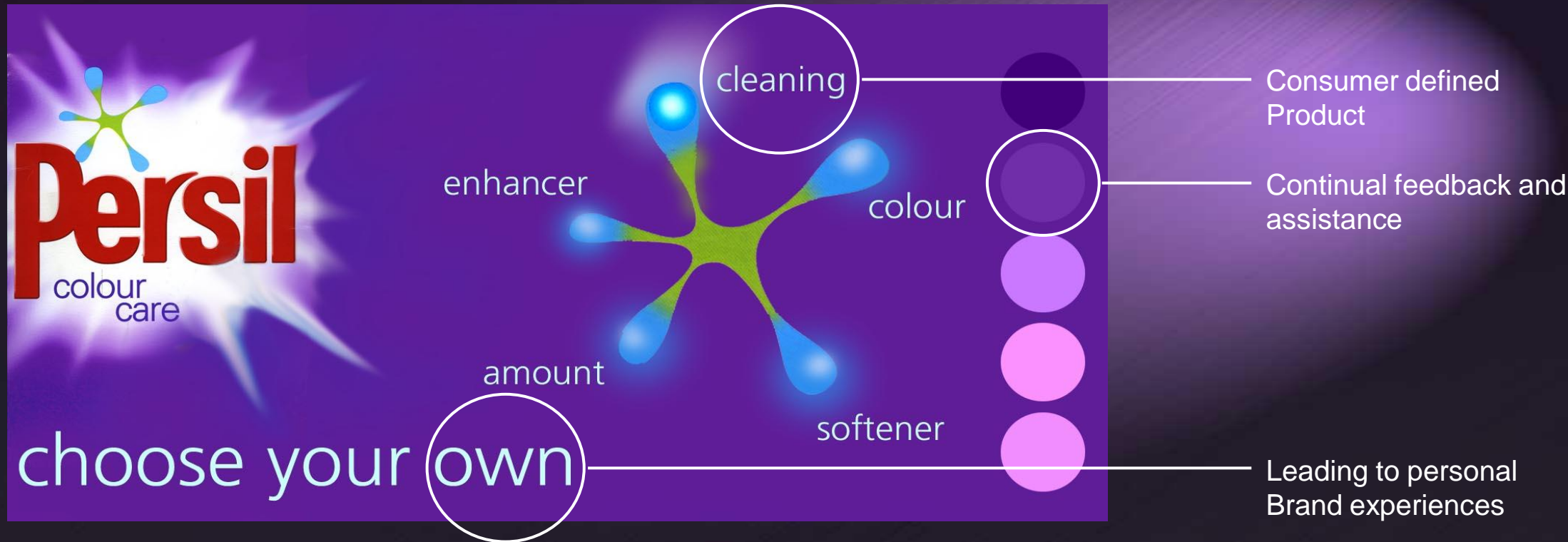


All materials shown remain the copyright of the PI Group and are not for distribution

We understand the key aspects of the in store system from presentation to the experience in use.  
The mechanical design and system engineering are well understood and refined.



## Where are we today...brand



All materials shown remain the copyright of the PI Group and are not for distribution

We can deliver flexible brand and product relevant interface designs to meet current and future brand needs.  
We can strengthen brand loyalty and introduce new competitive benefits based on personalisation of message and product.

# Where are we today...brand



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Simple ergonomics and an effortless experience are key to delivery.  
We can now deliver a far more sophisticated vending experience







# some projections

## Generation 1 Instore Refill Model

Example based on May 2010 Year to Date sales data provided by Brand and performance data based on 2010 ASDA trial provided by esiserv



### STRENGTHS

- 1 Potential to increase margin for Brand and Retail Partners
- 2 Releases new space on shelf for Brand and Retail Partners
- 4 Potential to 'own' new distribution model for liquid products
- 5 IP ownership of key methods and models (US)
- 6 Practical instore experience and learnings from trials
- 7 Partnership with key supplier (esiserv)
- 8 Future readiness for GHG tax mitigation
- 9 Reduced assets

### WEAKNESSES

- 1 Momentum behind current commercial model
- 2 Puts pressure on conventional asset margins
- 3 Momentum behind current Retail Partner model
- 4 The model is too different/new
- 5 Perceived complexity of new model?

### OPPORTUNITIES

- 1 Potential to improve Brand perception instore via new media experiences and presentations
- 2 Exploitation of new Consumer Brand model
- 3 Potential for new forms of NPD development
- 4 Potential in emerging markets to increase margin
- 5 potential for 'middleware' distribution company owned by Unilever

### THREATS

- 1 Competitor introduces system
- 2 3rd party start-up launches system
- 3 Retail Partners find alternative model or offer

Brand Impacts	Conventional Model		Distributed Model		Savings May 09 TD	Potential Annual Savings
	per litre	May-09	per litre	May-09		
Manufacturers Costs TOTAL	£0.71	£24,722,049.27	£0.49	£16,945,836.78	£7,776,212.48	£18,662,909.96
Retailers Costs	£0.101	£3,509,293.16	£0.03	£1,135,462.10	£2,373,831.06	£5,697,194.55
Capital Costs	£1,354,166.67		£3,035,714			
Retail margin	34%		54%			
Retailer Impacts						Potential Retailer Annual Gains
Increased value per linear metre	£0.00			200.00%		
Increased aisle throughput	£0.00			£7,776,212.48		£18,662,909.96
Extrinsic Costs Mitigation						Potential GHG Tax Mitigation
GHG Taxation Impacts	£1,189,045.26		£0.00			£1,189,045.26





STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> <li>1 Potential to increase margin for Brand and Retail Partners</li> <li>2 Releases new space on shelf for Brand and Retail Partners</li> <li>4 Potential to 'own' new distribution model for liquid products</li> <li>5 IP ownership of key methods and models (US)</li> <li>6 Practical instore experience and learning's from trials</li> <li>7 Partnership with key supplier (esberv)</li> <li>8 Future readiness for GHG tax mitigation</li> <li>9 Reduced assets</li> <li>10 Additional Increased margins going direct</li> <li>11 Brand strength through Peer to Peer relationship with consumer</li> <li>12 Independence from Retail model</li> </ul>	<ul style="list-style-type: none"> <li>1 Momentum behind current commercial model</li> <li>2 Puts pressure on conventional asset margins</li> <li>3 Momentum behind current Retail Partner model</li> <li>4 3rd party dependencies</li> <li>5 Speed to market</li> <li>6 The model is too different/new</li> <li>7 Perceived complexity of new model?</li> <li>8 New dependency on distribution company</li> </ul>
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Extrinsic Costs Mitigation						Potential GHG Tax Mitigation
<b>GHG Taxation Impacts</b>	£1,189,045.26			£0.00		£1,189,045.26
Direct Model Margin Gain						Potential Margin Increase
10% of total sales	£3,729,877.34					£2,016,803.94
25% of total Sales	£9,324,693.35					£5,042,009.85



But surely this is impossible?  
It means too great a change

# consensus

**Up until the 16<sup>th</sup> century everyone knew the sun orbited the earth**

**Up until 1660 everyone knew illness was caused by humours or sin**

**Up until 1829 everyone knew beyond 30 mph passengers would suffocate**

**Up until 1903 everyone knew manned flight was impossible**

**Up until 1947 everyone knew breaking the sound barrier was impossible**

*"Landing and moving around on the moon offer so many serious problems for human beings that it may take science another 200 years to lick them."*

**August 1948 *Science Digest***

***"It's a plastic rocket powered by laughing gas" - Mike Griffin Head of NASA on  
SpaceShip One***

# consensus

..the U.S. could not "gain anything by confusing hypothetical commercial capabilities that might someday exist with what we can actually count on now to meet the nation's needs."

former Lockheed Martin executive Tom Young

"We cannot continue to coddle the dreams of rocket hobbyists and so-called 'commercial' providers who claim the future of U.S. human spaceflight can be achieved faster and cheaper than Constellation,"

Senator Shelby

# fact

It took the organisation that became NASA and its contractors over ten attempts to launch a satellite into orbit

Space X –founded by Pay Pal founder Elon Musk , did it first try

...and the rocket launched a spacecraft designed to carry a crew of seven



F9

SPACEX

Falcon 9 Inaugural Launch



“People always overestimate change in the  
short term  
and underestimate change in the long term”

William Gates the 3<sup>rd</sup>  
Another small time computer geek

pld8

an innovative approach to innovation