

I S B A

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**One
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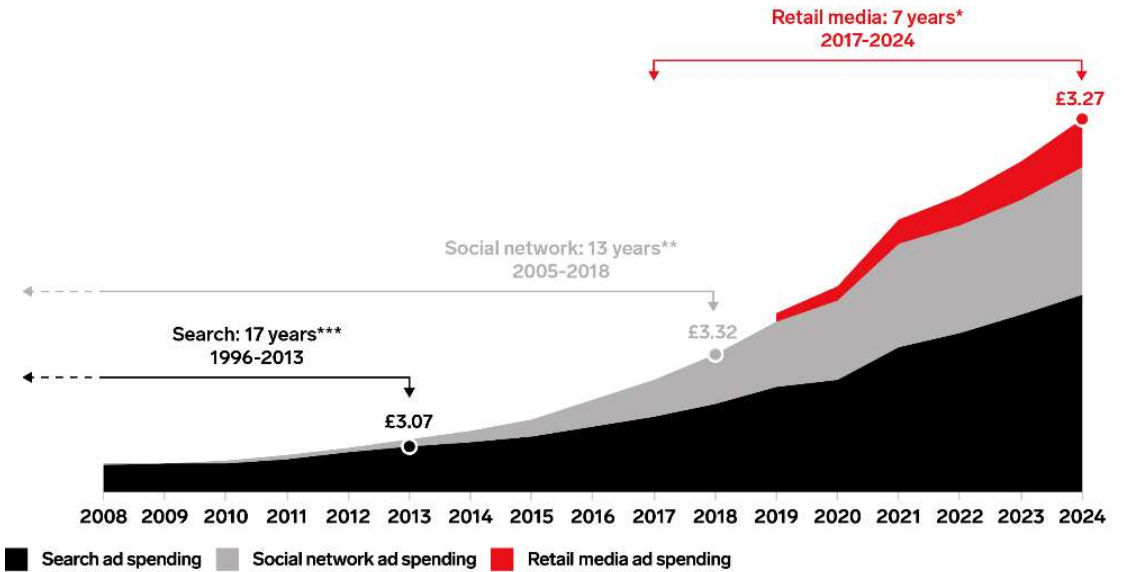
I S B A

Standardising and exposing the retail media opportunity for brands



The retail media wave has landed in Western Europe and is highest in the UK*

Digital Advertising's Third Wave Comes to the UK: Retail Media Reached £3 Billion Within 7 Years, Much Faster Than Search or Social Advertising
billions in UK digital ad spending, 2008-2024



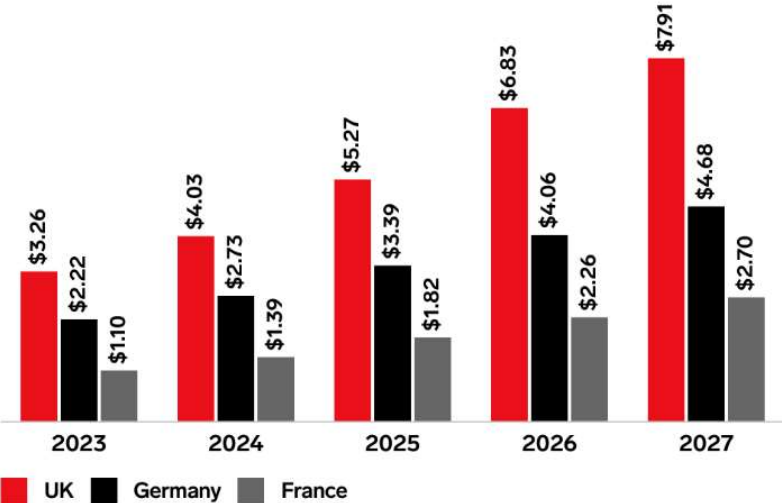
*Note: *Amazon launched Amazon Advertising in 2012, but 2017 was the year that Asda launched its Walmart Exchange ad platform in the UK to mark a competitive retail media landscape in the country; **Facebook first introduced advertising in 2005; ***OpenText ran the first pay-per-click ads showing up in search results in 1996*
Methodology: Estimates are based on the analysis of various elements related to the ad spending market, including macro-level economic conditions; historical trends of the advertising market; historical trends of each medium in relation to other media; reported revenues from major ad publishers; estimates from other research firms; data from benchmark sources; consumer media consumption trends; consumer device usage trends; and eMarketer interviews with executives at ad agencies, brands, media publishers, and other industry leaders.
Source: Insider Intelligence | eMarketer Forecast, Oct 2023



The retail media wave has landed in Western Europe and is highest in the UK*

The Retail Media Wave in Western Europe Will Crest Highest in the UK

billions in retail media ad spending in France, Germany, and the UK, 2023-2027



Note: digital advertising that appears on websites or apps that are primarily engaged in retail ecommerce or is bought through a retailer's media network or demand-side platform (DSP); examples of websites or apps primarily engaged in retail ecommerce include Amazon, Walmart, and eBay; examples of retail media networks include Amazon's DSP and Etsy's Offsite Ads; includes ads purchased through retail media networks that may not appear on ecommerce sites or apps
Source: Insider Intelligence | eMarketer Forecast, Oct 2023

*Insider Intelligence: France, Germany and the UK Retail Media Ad Spending Forecast 2024



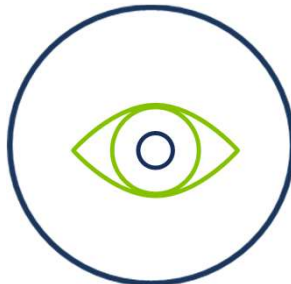
ISBA's Responsible Framework for Retail Media Measurement



Availability of Data & Insights



Impression Definitions



"New" Data Methodology



Transparent Attribution Methodology

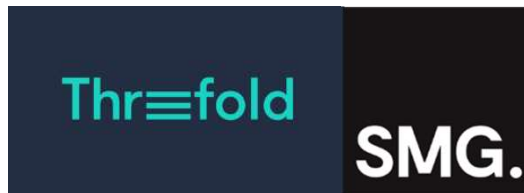


The long term value of retail media

MARK THOMPSON & ISABEL TREW



The number 1 health & beauty retailer with 16 million Advantage Card customers and over 2000 stores



Powered by industry experts with over 15 years' experience, leading the way for retail media



Activating campaigns for the UK's favourite brands



Retail media is the
fastest growing
area of marketing

It's going to be bigger than linear TV!



#DysonAirstrait

We wanted to understand the true & total value of our media

1. What can we learn about customer **behaviour** and **responsiveness** to different types of Media?
2. How does Boots Media fare within the **wider media mix**?
3. What **impact** does Boots media have on a shopper's **experience** of a brand?

ESTÉE LAUDER
24-HOUR WEAR 60 SHADES
COLLECT **£10** WORTH OF POINTS

Seed, find your forever foundation with Estée Lauder's Double Wear Stay-in-Place Foundation SPF 10.

With a formula which is sweat, heat and humidity-resistant, it's the No.1 prestige foundation in the UK* that will keep you looking flawless with all day oil-control.

Plus, enjoy **£10 worth of points** when you buy two Estée Lauder products, one to be foundation.* **Hurry this offer ends soon**, add Double wear to your basket today!

Going, going

NEW FENTY BEAUTY HELLA THICC VOLUMISING MASCARA

Hella big, hella bold, hella thicc lashes

Thick & lifted lashes for voluptuous volume

Shop the Fenty range!

SHOP ALL

#boots.com

FENTY BEAUTY BY RIHANNA
NEW
FOR LASHES THAT **LAST**

Seed, say hello to the NEW volumising baddie on the block – Fenty Hella Thicc Mascara.

Buildable, lightweight and transfer-resistant, this non-clumping formula lifts lashes with a simple flick of the wrist. Its tapered-bristle brush coats lashes from root to tip for extreme volume that lasts.

Run, don't walk, make it yours today!

Shop now

PROMOTION

KYLIE'S ICONS

Discover the viral sensations and most sought-after products from Kylie by Kylie Jenner. These are the iconic products you need in your beauty stash...

"I created Kylie Cosmetics to give my fans access to the makeup products that I love and use every single day to create my look. I love that make-up can make you feel confident and beautiful, and I want to share that feeling with you guys."
-Kylie

Make it matte
With one swipe every fan-favorite, the Kylie Cosmetics Matte Lip Stain is the ultimate duo for long-lasting matte lip color. From everyday nudes to bold, vibrant shades, it's all here. Shake with the Lip Stain! Men: Mix with the Matte Lip Stain for great definition.

Gorgeous to-go
Revamp your morning routine with the Kylie Skin All-Over Mist. Set, SPF, gently exfoliate with the Foaming Face Wash (50ml), balance with the Skinia Hydrating Toner (100ml), boost radiance with the Primeo Serum (100ml), then finish with the Face Protection Cream.

Luxe lips
Formulated with squalene oil and shea butter, the Kylie Skin Lip Oil (10ml) The conditioning formula hydrates and softens, leaving lips smooth and visibly plumper. Apply to bare lips or shade or over lipstick to add extra shine, perfect from day to night.

Build your blush
Luxuriously smooth, Kylie Cosmetics Pressed Powder Blush (15g) gives a cooling, melt-in-the-mouth flush of color with buildable coverage. Whether you love a berry blush or a terracotta tone, the lightweight formula blends in easily for a soft glow.

NEW **GIVENCHY**
GENTLEMAN SOCIETY

Seed, Givenchy redefines masculine fragrance with its NEW Eau de Parfum, Gentleman Society.

Striving towards creativity and authenticity, Gentleman Society makes a bold statement for those who reinvent the rules, and always act for the better.

Plus, receive a free travel size Givenchy Gentleman Society when you buy Givenchy Gentleman Society Eau de Parfum 60ml and above.*

I'm in

The research captures customer behaviour in the moment

BEFORE SURVEY

Survey to capture brand health metrics and imagery



DURING REAL-TIME

Diary to capture brand experiences real-time



AFTER SURVEY

Survey to capture brand health metrics and impact of experiences



4 key areas of focus

Exposure



NOTICEABILITY

Build Brand Equity



PERCEPTION



CONSIDERATION



RECOMMENDATION

BMG activity helps to make brands appear more innovative and different

Improvement in Brand Imagery

Boots Media Experience
is innovative,
2.52

Boots Media Experience is
different from other brands,
1.96

Source: Boots Media Group x MESH Experience, 2023
Experience Maximizer | Patterned bars = <90% significant

And more likely to recommend the brand to others

"I went into Boots in Bond Street [...] I saw new and **innovative skin serums** and I read the **advertising** and the claims it made and I had to try it based on the claims and the **packaging**. I am happy I bought the product and I feel privileged to be using a serum that is just **new in the market** and I will be the **first to use it among my friends and family group.**"

Boots Email Experience

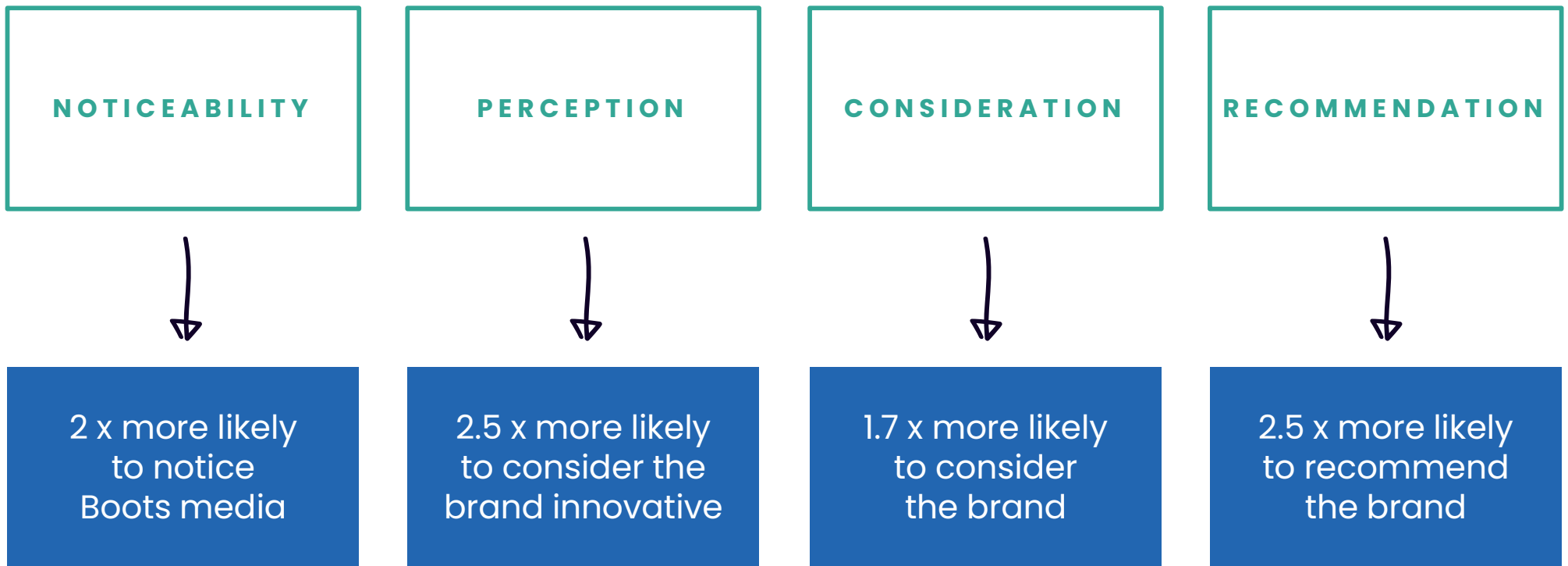
Participants who had a Boots experience:

2.5x

More likely to recommend the brand

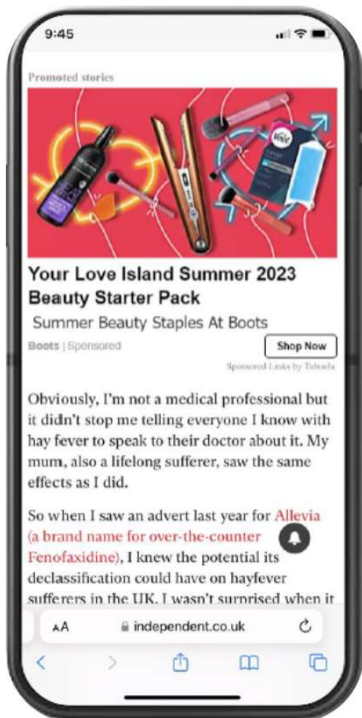
Source: Boots Media Group x MESH Experience, 2023
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4 key takeouts from the study



70% of advertisers still identify conversion as their most important goal for campaigns that use retail media.

We have the tools facilitate brand building



The potential of retail media lies in its unique ability to unite brands and retailers



Let's talk women's health

FOR TOO LONG, WOMEN FELT EMBARRASSED TO TALK ABOUT WHAT WAS GOING ON WITH OUR BODIES. BUT NEW RESEARCH SHOWS THIS IS CHANGING

55% of women feel embarrassed to talk about their health

65% of women feel embarrassed to talk about their health

82% of women feel embarrassed to talk about their health

Yes, your pharmacist can help

Boots expert pharmacist, Claire Harrison shares some of the most common women's health issues and how your pharmacist can help.

Here to help

From fertility to menopause, our expert pharmacists are here to help you with your health. Visit [boots.com/healthhub/womens-health](https://www.boots.com/healthhub/womens-health) for more advice.

health

6 Things Your Period Can Reveal About Your Health

You should pay attention to unexpected changes during your period.

The Article List

- Menstrual cramps: 10 ways to get relief
- Irregular periods: 5 reasons why
- Heavy periods: 4 ways to manage them
- Light periods: 3 reasons why
- Spotting: 4 ways to manage it
- Missed periods: 5 reasons why

Shop now

Boots UK

Sponsored (adsense)

Boots Price Advantage gives you up to half price off 100s of healthcare products

Shop now

In store | boots.com | App



Women's health advice

KEY TOPICS

- Menstruation
- Pregnancy
- Menopause
- Sexual health
- Contraception
- Menstrual pain

Vitabiotics

hairfollic

Shop now

Save up to 1/2 price

Unlock 100s of lower prices today

Shop now

Our health is as individual as we are

Periods, fertility, immune health and beyond – each woman's experience is individual to them.

Which is why we're helping people find health and wellness support, with a selection of products designed to support through each stage – from period care to skin supplements and more.

With offers across our unrivalled range, finding the right health support just got easier.

Shop now

SUPPORT VITAMIN D LEVELS

For effective immune support, there's Boots' range of Vitamin D oral sprays. These convenient sprays are great for those who struggle to get their Vitamin D levels up.

Shop now

HELP MAINTAIN SKINS APPEARANCE

Skincare from Boots contains Vitamin C to help support natural collagen production for the normal function of the skin and to protect against free radicals.

Shop now

SUPPORT WITH CONCEPTION

Enhance the comfort of intense sexual contact with The Social Fertility Lubricant. The natural and pH-balanced formula mimics female fluids, helping couples enjoy their most intimate moments.

Shop now

SUPPORT VITAMIN INTAKE

From pre-conception to pregnancy, My Expert Fertility's supplements for women use plant-based vitamins and minerals to support mother and baby, including Vitamin C, which contributes to the maintenance of normal bones.

Shop now

FIND COMFORTABLE PERIOD CARE

For period care that's eco-friendly, naturally soft, gentle on your skin and 100% organic cotton and bamboo, FLEEDER pads & liners are available in 100% organic cotton and bamboo. FLEEDER pads & liners are available in 100% organic cotton and bamboo.

Shop now

HELP PREVENT BLEEDING GUMS

For healthier gums and stronger teeth, try Corsoil Complete Protection Toothpaste. It gently whitens and targets bad breath to help prevent a messy fresh chisel.

Shop now

LIFE STAGE SUPPORT

Vitabiotics have a range of support through different life stages with expert nutritional care. Progesterone, Menopause and Wellwoman contain

Thankyou

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