Anti-trust

Participants on GS1 Boards, committees, task forces, work groups, or other similar bodies, must always remember the purpose of the Board, committee, task force, or work group is to enhance the ability of all industry members to compete more efficiently and effectively to provide better value to the consumer or end user. GS1 activity almost always involves the cooperation of competitors; therefore great care must be taken to assure compliance with trade practices laws in Australia and in other jurisdictions.

This means:
• Participation must be voluntary, and failure to participate shall not be used to penalise any company.
• There shall be no discussion of prices, allocation of customers or products, boycotts, refusals to deal, or market share. (For the avoidance of doubt, this does not preclude discussion of GS1 prices, customers or products.)
• If any participant believes the group is drifting toward impermissible discussion, the topic shall be tabled until the opinion of lawyer(s) with experience in trade practices law can be obtained.
• Where appropriate, meetings shall be governed by an agenda prepared in advance, and recorded by minutes prepared promptly after the meeting.
• Where appropriate, tests or data collection shall be governed by protocols developed by GS1.
• GS1 reserves the right to seek opinion of lawyer(s) with trade practices experience on any matter or document arising out of any GS1 activity.
• The recommendations coming out of a GS1 Board, Committee, Task Force, Work Group, or other similar body are just recommendations. Individual companies remain free to make independent, competitive decisions.
• Any GS1 standards developed must be voluntary standards.
# Agenda

<table>
<thead>
<tr>
<th>Time</th>
<th>Item</th>
<th>Who</th>
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</thead>
<tbody>
<tr>
<td>9am</td>
<td>Welcome, Anti trust &amp; Introductions</td>
<td>All</td>
</tr>
<tr>
<td>9:10am</td>
<td>Myer Update</td>
<td>Gary Stones</td>
</tr>
<tr>
<td>9:30am</td>
<td>Google Inventory Feeds &amp; RFID</td>
<td>Kate Conroy</td>
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<tr>
<td>9:50am</td>
<td>RFID &amp; IoT, What’s it all about?</td>
<td>Geoff Ramadan</td>
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<tr>
<td>Break</td>
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<tr>
<td>10:40am</td>
<td>2017 Wrap up, inc retailer update</td>
<td>All</td>
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<tr>
<td>11:10am</td>
<td>Next Steps inc 2018 schedule</td>
<td>All</td>
</tr>
<tr>
<td>11:15am</td>
<td>Close (for Melbourne)</td>
<td></td>
</tr>
<tr>
<td>11:45am</td>
<td>Close (for Sydney)</td>
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Welcome

Sean Sloan, BD & Partnerships Manager
Purpose (reminder)

- Openly share best practice information
- Promote the benefits of Item Level RFID
- Grow knowledge
- Networking
Myer Update

Mr Gary Stones, National Retail Operations Manager
Google Inventory Feeds & RFID
Kate Conroy
2017 Wrap up
SCW Wrap up

- Total number of attendees = nearly 700
- Retail attendees = 150
- Feedback very positive!
- RFID panel was well received
Summary of 2017 presentations

• Reminder that in 2017 we covered the following areas:
  - Business Case Development / Discovery Phase (RAMP)
  - Proof of Concept to Pilot (Tyco)
  - Tag selection (Checkpoint)
  - RFID in a warehouse (Checkpoint)
  - Increasing your buying power (NARTA)
  - RFID IT architecture (RAMP)
  - Point of Sale use cases (Tyco)

• In general we also covered:
  - Value of standards in a RFID implementation
  - ROI calculator tools
Endorsements to date

- True Alliance
- Myer
- Next Athleisure
- Spotlight Retail Group
- CUE Design

![Endorsement Logos]
EPC Guideline downloads

EPC RFID Guideline Downloads

No. of downloads

Sector

Other  Apparel  GM&A  Publication  Mining  Education  Vendor  Rail  Unknown  FMCG  G3 MO  Transport

0  5  10  15  20  25  30
# Social stats

<table>
<thead>
<tr>
<th>Date</th>
<th>Update</th>
<th>Impressions</th>
<th>Clicks</th>
<th>Click Thru Rate (CTR)</th>
<th>Social Actions</th>
<th>Engagement</th>
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<tr>
<td>13 Sept 2017</td>
<td>Launch of EPC RFID Guideline at SCW 2017 in Melb</td>
<td>217</td>
<td>2</td>
<td>0.92%</td>
<td>5</td>
<td>3.23%</td>
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<td>13 Sept 2017</td>
<td>Gary Stone endorsing the guideline at SCW 2017</td>
<td>132</td>
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<td>6 Sept 2017</td>
<td>Launch of EPC RFID Guideline at SCW 2017 in Syd</td>
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<td>17</td>
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<td>16 Feb 2017</td>
<td>RFID Guidelines – inventory accuracy in apparel and footwear</td>
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<td>0.8%</td>
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<td>1.38%</td>
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<td>17 Jan 2017</td>
<td>Benefits of RFID in retail – download guideline (Business LiNK article)</td>
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<tr>
<td>15 Sept 2016</td>
<td>The new Apparel RFID Implementation Guidelines</td>
<td>1683</td>
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<td>1.01%</td>
<td>14</td>
<td>1.84%</td>
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**Impressions:** The number of times each update was shown to LinkedIn members.  
**Clicks:** The number of clicks on the update content.  
**CTR:** The number of clicks that each update received relative to the number of impressions. 2% is excellent.  
**Social Actions:** Number of times each update is liked, shared and commented on.  
**Engagement:** The number of interactions, clicks and followers acquired divided by the number of impressions. 2% is excellent.  
In general, the overall results are above average.
Social Media - Getting the message out there!

• Throughout 2017, GS1 Australia used its “GS1 Australia LinkedIn” page to promote the EPC Guidelines.
• Through the analytics available, we know this information got in front of xx people..
• How else can we get the message out there?
• Suggestions?
Growth indicators

- Seeing a distinct increase in number of active vendors working on RFID projects in this industry plus for other applications like healthcare and asset tracking.
- More active ‘trials’ going on
- Greater press awareness of RFID locally
Lululemon – some interesting facts!

- 98% accuracy
- 2.5 year project inc pilot
- 300 stores
- 30 factories / 15 countries
- Stock turns each 45 days
- Store deliveries 5 days per week
- Consumer app links to store inventory
- At end 2016, profit increased 28%
- Lift in gross profit margin
- Revenue up 13% to $544.4M
- 16% inc in online sales v 4% rise Store comparable

Jonathan Aitken, Ex IT Director Retail & RFID, Lululemon
RFID is a fast growing business

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<th>2005</th>
<th>2010</th>
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<td>Other</td>
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<tr>
<td>Total</td>
<td>1.9</td>
<td>5.6</td>
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Number of case studies by project status is a glimpse of the future from the IDTechEx RFID Knowledgebase.
Here comes China
From the IDTechEx RFID Knowledgebase

Number of case studies

- United States: 1375
- United Kingdom: 397
- China: 303
- Germany: 224
- Japan: 190
- France: 170
- Australia: 118
- Canada: 101
- Netherlands: 93
- Italy: 87
Case studies by tag location
From the IDTechEx RFID Knowledgebase
New Omni Channel Sales Channels REQUIRE Higher Inventory Accuracy!

- **FIS** (Find In Store) - a.k.a Item Availability
  - Demand
  - Supply/Fulfillment

- **AOS** (Associate Ordering In Store) - a.k.a Save the Sale
  - Demand
  - Supply/Fulfillment

- **MCGC** (Multi-Channel Giftcards) - a.k.a Giftcards
  - Demand
  - Supply/Fulfillment

- **BOPIS** (Buy/Reserve Online Pickup in Store)
  - Other variations: Click & Collect, Reserve online, pickup in store
  - Demand
  - Supply/Fulfillment

- **SFS** (Ship From Store) - a.k.a Store fulfillment
  - Other variations: last mile logistics
  - Demand
  - Supply/Fulfillment

*Courtesy of Levi Strauss & Co.’s Presentation at GS1 Connect 2015*
Industry Call to Action

On May 13, 2014 GS1 US distributed an industry-written RFID outreach letter to trading partners of Bon-Ton, Hudson’s Bay, Kohl’s, Lord & Taylor, Macy’s and Saks Fifth Avenue:

• Omni-channel retail is here to stay and RFID is foundational to delivering on the strategy - in every product category.
• RFID has moved beyond inventory replenishment. It is an essential component to enable the supply chain visibility and inventory accuracy needed to know what’s available, where it’s located and how to best deliver it.
• A growing number of retailers already have programs in place and are rolling-out RFID, and are realizing important benefits for their customers.
• It is important to begin developing your plans to implement now.
RFID in the USA Today

- Bon-Ton
- Hudson’s Bay
- Dillard’s
- JC Penney
- Kohl’s
- Lord & Taylor
- Macy’s
- Neiman Marcus
- Nordstrom
- Saks Fifth Avenue
- Sears Holdings
- Target
- Walmart

Many RBO’s that operate their own stores as well as vertically integrated brands including American Apparel, Chico’s FAS, Lululemon and others.

1. GS1 US Standards Usage Survey, 2014
2. The above named retailers have all discussed their RFID deployments being in various phases of testing/implementation during the 2014 or 2015 calendar year.
# Leading Categories of Implementation

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<td>Bath</td>
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<td>Bedding</td>
<td>Footwear</td>
<td>Pants / Slacks / Long Bottoms</td>
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<td>Belts</td>
<td>Handbags</td>
<td>Sleepwear and Robes</td>
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<td>Children's wear</td>
<td>Headwear</td>
<td>Small Leather Goods</td>
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<tr>
<td>Coats</td>
<td>Home Accessories</td>
<td>Socks – Dress &amp; Basic</td>
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<td>Cookware</td>
<td>Hosiery</td>
<td>Sportswear / Athletic</td>
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<td>Cutlery</td>
<td>Innerwear - Basics</td>
<td>Suit Separates / Suits</td>
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<td>Denim</td>
<td>Intimates</td>
<td>Swimwear</td>
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<td>Designer / Collections</td>
<td>Jewelry</td>
<td>Ties / Neckwear</td>
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<tr>
<td>Dress Shirts</td>
<td>Kitchen Electrics</td>
<td>Toys / Games</td>
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*Children, Men, and Women  
**Replenishment- and Fashion-based business*
All Retailer update
Open Discussion

• Current Status
• Internal awareness levels Ie Buyers?
• Potential impediments
• Any misconceptions
• Logical starting points (Division / category / supplier)
• Benefit awareness
• ??
In summary...

- Retailers are seeing the potential benefits and thus ‘dipping the toe in water’!
- ARRA itself is growing – number of new members
- Significant opportunity to trial and learn
- Global competitors continue to arrive armed with years of RFID experiences
- RFID remains simply an enabler for other projects
Next Steps / Other business
Next steps...

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</table>
RFID Videos

- https://youtu.be/EpIinGX_sBc (Zara)
- https://youtu.be/cZfx2naKYXo (Lululemon)
- https://youtu.be/V72Ep4s9T4o (AdvanRobot)
- https://youtu.be/QimxMkB7o_g (Bob Ton)
- https://youtu.be/KPt_e3ob_ZA (River Island)
Recent publications / News of interest

- RFID for Retail, what you need to know
- IoT & RFID – Connecting the CPG sector
- AdvanRobot – Taking people out of the counting equation
- RFID for omni Channel success
- Measuring Omni Channel performance
- John Lewis RFID Rollout
- RFID starts to go mainstream
- Macy’s RFID tagging 100% by 2017
- Making the Business Case for RFID in Retail
- Key RFID study confirms link to inventory accuracy
- Establishing an RFID strategy - PWC
- RFID doesn't lie - Lululemon success story
- Omni Channel success in fashion_Detego whitepaper
- Making GS1 standards relevant in RFID_TIPP Guidelines released
GS1 Contacts

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0407 567 240