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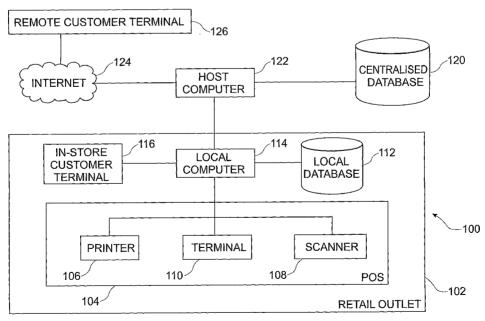
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(54) Title: METHOD AND SYSTEM FOR TRIAL MARKETING



(57) Abstract: A method for providing a customer a trial product, wherein the method includes the steps of selecting one or more products to be purchased, each said product having a product identification. Designating at least one of said one or more products as a trial product. Receiving a customer identification from the customer. Comparing said product identification and said customer identification to a customer purchase record. If said trial product has not been purchased and/or designated previously, deducting a cost of said trial product from an overall cost of transaction.



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"METHOD AND SYSTEM FOR TRIAL MARKETING" FIELD OF THE INVENTION

The present invention relates to a method and system for trial marketing. In particular, although not exclusively, the invention relates to trial marketing of products from a retail outlet, and/or trial marketing of services from a service provider.

DESCRIPTION OF THE PRIOR ART

Retail shoppers are creatures of habit. They typically buy products that they have had in the past and look for these products on regular basis.

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After a period of time shoppers can "tune out" while shopping and revert to an "auto-pilot" mind set, in which they simply go to specific locations in the store and collect their preferred products, thus paying little or no attention to other products available within the store.

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In addition, shoppers with busy lifestyles may have a mind set of, "What is the quickest way of getting in and out of here with what I need?" As a consequence, these shoppers rush from one known product location to the next, again paying little or no attention to other available products.

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From the manufacturer's and retailer's perspective, these shopping habits are undesirable. Ideally, manufacturers and retailers would prefer customers pay close attention to all of their products, in particular new or premium products. Furthermore, retailers prefer that all shoppers enjoy each shopping experience, which would reflect an increase in expenditure by each shopper per visit.

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A marketing strategy that manufacturers and retailers use to draw attention to certain products to shoppers includes providing shoppers with trial or sample products. Often sample products require the manufacturers to employ in-store salespersons which offer free samples to shoppers while shopping. While this technique of providing free samples is moderately successful, it is generally limited to a particular type of product (i.e. snacks and smallgoods) and fails to provide shoppers with a wider variety of products to sample.

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In addition, manufacturers also implement advertising campaigns in conjunction with sample giveaways in the endeavour to promote new or existing products. Examples of such campaigns include periodic publications wherein samples are incorporated with a related advertisement within the publication. While consumers are appreciative of the giveaways, the costs associated with these campaigns are high and are limited to "use once only" products, thus failing to provide potential consumers with an accurate impression of the quality of the goods.

US patent application US 2002/0029173 assigned to Goldstein, refers to an alterative sample method. In particular, it refers to a method that provides customers with trial samples of publications, such as magazines, over a short period of time rather than ordering full-term subscriptions to such publications. When a customer browses a website, a customer can select a particular category or interest, software associated with the website then determines relevant publications for the customer. Thus, allowing the customer the opportunity to review samples of various publications and

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allowing the customer to make a more informed decision before fully subscribing to a particular publication. While this method would be beneficial to publishers, such a method would not be applicable to all manufacturers.

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International patent application WO 02/35422 assigned to Catalina Marketing International Inc. refers to a method and system for real-time monitoring of consumers behavioural and attitudinal data. Specifically, the document details a retail monitoring system in which data relating to products including trial products are analysed continuously in a real-time environment. While this system provides manufacturers and retailers with a useful tool to assess products, consumers are not provided with an incentive to participate in the system, thus neglecting an opportunity to promote new or existing products.

It is an object of the present invention to at least ameliorate the disadvantages and shortcomings of the prior art, or at least provide the public with a useful alternative. Further objects will be evident from the following description.

SUMMARY OF THE INVENTION

In one form, although it need not be the only, or indeed the broadest form, the invention resides in a method for providing a customer a trial product, said method comprising the following steps:

selecting one or more products to be purchased, each said product having a product identification;

designating at least one of said one or more products as a trial product;

receiving a customer identification from the customer;

comparing said product identification and said customer identification to a customer purchase record; and

if said trial product has not been purchased and/or designated previously deducting a cost of said trial product from an overall cost of transaction.

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Suitably the product identification is determined at a point-of-sale. The product identification may be determined using known point-of-sale scanning devices, such as bar code scanners.

Customer identification is most conveniently obtained from a credit card or customer loyalty card which is read using conventional card reading technology such as magnetic stripe readers.

The customer purchase record is most conveniently maintained in a database. The customer identification and product identification may be transmitted to the database for the comparison to be made at a central server. Alternatively, the customer purchase information may be transmitted from a central database to the point-of-sale for local processing.

An optional step of the method is to require the customer to spend a minimal amount at the retail store as a condition for having the cost of the trial product deducted the overall cost of transaction.

A further optional step of the method is to permit the customer to access their customer purchase record.

In another form the invention resides in a system for providing a customer a trial product, said system comprising:

a product identification device for collecting product identification, wherein said customer selects one or more product to be purchased and designates at least one a trial product;

a customer recognition device for receiving customer identification;
a database having a customer purchase record, signally connected to
said product identification device and customer recognition device;

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wherein said product identification and customer identification is compared to said customer purchase record, such that if said trial product has not been purchased and/or designated previously, cost of said trial product is deducted from an overall cost of transaction.

The system may further include an in-store customer terminal and a remote customer terminal.

BRIEF DESCRIPTION OF THE DRAWINGS

In order that the present invention may be readily understood and put into practical effect, reference will now be made to the accompanying illustrations wherein:

Figure 1 is a schematic view of a system for providing a customer a trial product according to one embodiment of the invention;

Figure 2 is a flowchart of a method for providing a customer a trial product according to one embodiment of the invention.

Figures 3-7 are flowcharts of methods for providing a customer a trial product according to other embodiments of the invention.

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DETAILED DESCRIPTION OF THE DRAWINGS

Figure 1 shows a system 100 for providing a customer a trial product according to an embodiment of the invention. The system 100 comprises a retail outlet 102, a point of sale (POS) 104 and a host computer 122 and a centralised database 120.

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The retail outlet 102 could be a conventional supermarket which stocks a number of products for a customer to select. While this embodiment of the invention will be described in the context of a conventional supermarket, a person skilled in the art would fully appreciate that the invention could easily be implemented in a number of different outlets such as a department store or a convenience store.

The POS 104 is a location within the retail outlet 102 where the customer after selecting a group of products and a designated trial product presents all products to a clerk for processing. The POS 104 further includes a printer 106 for printing receipts and/or coupons, a scanner 108 for scanning barcodes of the selected goods and a terminal 110. The scanner 108 collects information associated with each product scanned. Information collected would include the product item reference and price. Preferably, the scanner 108 is a barcode scanner which is compatible to read a number of symbologies including two dimensional, linear and stacked. The terminal 110 would include a monitor or screen, a keyboard or input device and a customer recognition device. The customer recognition device may be incorporated with an electronic funds transfer point of sale (EFTPOS) terminal, or credit card terminal. Alternatively, the customer recognition

device may include a radio frequency identification card (RFID), which identifies the customer to the system 100. Information collected from the customer recognition device is compared to records which are stored on the centralised database 120, or upon a local database 112, which would be located within the retail outlet 102.

Although Figure 1 only shows one POS 104 in the retail outlet 102, a person skilled in the art would appreciate that the present invention could be implemented with a number of POS's 104 within one retail outlet 102.

A local computer 114 is signally (i.e. wired or wireless) connected to the POS 104 and allows the POS 104 access to a local database 112 and the centralised database 120. In addition, the local computer 114 is signally connected to an in-store customer terminal 116 and an external host computer 122. Generally, the local computer 114 provides an administrative control of the system 100 within the retail outlet 102.

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The local database 112 stores data associated with the barcodes for each product within the retail outlet 102. Such that, when a product is scanned information relating to the product is retrieved from the local database 112 and transmitted to the POS 104, or alternatively retrieves product information from the centralised database 120. In addition, the local database 112 can store a local customer purchase record, which would include a record of all products purchased and previously designated as the trial products within that particular retail outlet 102. Preferably the local database 112 would be incorporated with other databases used within the

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retail outlet 102, for example databases which are allocated to stock control, employees' records.

The in-store customer terminal 116 would be located within the retail outlet 102 and allow a customer to access the centralised database 120 and their customer purchase record. In one possible scenario, a customer uncertain of their previously designated trial products can check their transaction history (i.e. customer purchase record) prior to selecting their products from the retail outlet 102. Furthermore, the in-store customer terminal 116 may include additional features which are available in conventional in-store electronic kiosks.

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The host computer 122 would be located externally from the retail outlet 102 and is preferably located with the centralised database 120 at a specified location. The host computer 122 is central to the overall working of the system 100 by connecting the retail outlet 102 to the centralised database 120, and access for customer on a remote customer terminal 126 via the internet 124 to their transaction history.

In addition to allowing customers access to their purchase details, the host computer 122 administers and/or hosts a webpage associated with the trial marketing programme. The website in conjunction with manufacturers can advertise, promote new products and run online competitions. Other features of the website could include online product surveys, recipes and general nutritional information.

Although Figure 1 illustrates only one retail outlet 102, preferably the system 100 could cater for a number of retail outlets 102, thus the host

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computer 122 and the centralised database 120 being a central hub of the system 100.

The centralised database 120 stores all customer purchase records. Specifically, the centralised database 120 collects all customer transactions from all retail outlets 102 within the system 100. The customer purchase record includes all products the customer has previously purchased and all products the customer has previously designated as the trial product since joining the trial marketing programme.

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In one embodiment of the invention, the system is implemented when a customer at a supermarket selects a group of products to be purchased. At the POS, the customer presents their customer identification and designates a trial product to the POS clerk. The clerk proceeds to scans all products present by the customer including the designated trial product. The scanned information and customer identification is transmitted to the centralised database and a search is performed on the customer's previously designated trial products. If the trial product has not been previously designated then the cost of the trial product is deducted from the overall costs of selected products, hence receiving the trial product for free. Alternatively, if the trial product has not been purchased and/or designated previously by the customer, cost associated with the trial product is deducted from the overall cost of selected products.

In another embodiment of the invention, a customer can browse a supermarket website which allows online purchasing of products. While on online the customer selects a group of products to be purchased. Prior to

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initiating the transaction, the customer provides identification and designates a trial product from the group of selected products. Information relating to the products and customer identification is compared to the customer purchase records stored on the centralised database. The trial product is compared to previously designated trail products, such that if the trial product has not been previously designated then the cost of the trial product is deducted from the overall costs of selected products, hence receiving the trial product for free. Alternatively, if the trial product has not been purchased and/or designated previously by the customer, cost associated with the trial product is deducted from the overall cost of selected products.

Figure 2 shows a flowchart 200 for providing a customer a trial product according to an embodiment of the invention. The method begins with a customer becoming aware of a trial marketing programme 202. The customer may have become aware of the programme via an advertising campaign or by in-store promotion. The customer then applies to join the programme 204, either by filing out an application form at a retail outlet or online on the previously mentioned website. The application is then processed and accepted 206 and new customer account/record is created 208.

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By postal mail or by courier the customer receives a customer welcome kit 200. Within the welcome kit customer receives an identification device and a programme overview (i.e. terms and conditions of the programme). The identification device may be a conventional magnetic swipe card, or as previously mentioned RFID card.

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Upon receiving the identification device and reviewing the programme overview, the client can proceed to a retail outlet and select a group of products to be purchased 212. When the customer reaches a POS 214, the customer is given a number of options (Figures 3-6) for receiving their trial product.

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Figure 3 shows the first option, flowchart 300, for this particular embodiment of the invention. At the POS, the customer identifies 302 themselves by providing a POS clerk with their identification device. With the identification device the clerk initiates the process by using a customer recognition device. The customer identification is verified by records stored at a centralised database.

The customer then designates a trial product 304 from a group of selected products chosen by the customer. Preferably, the POS clerk scans all products and then scans the trial product last. Alternatively, the trial product can be scanned first with the remaining products scanned afterwards.

The scanned information relating to all products and an authorisation request for the trial product are transmitted 308 to the centralised database. At the centralised database, the scanned information and request are processed 310.

In order for the authorisation request to be successful, conditions relating to the request require to be satisfied. Such a condition may include a threshold of spending by the customer. For example if the threshold of spending was \$100, the customer would be required to spend at least \$100

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or their request for the trail product will be declined. Preferably, the requirement would be that the trial product has not been previously designated as a trail product. Alternatively, if the trial product has not been purchased and/or designated previously by the customer, cost associated with the trial product is deducted from the overall cost of selected products. If the request for authorisation is declined 312 the customer is required to designate another product from the group of products selected. Instead of rescanning all the selected products and leaving the last product to be the trial product, the POS clerk rescans the designated trial product and by using the keyboard or input device, request authorisation for that particular product to be the trial product.

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If the authorisation request is successful, the cost associated with the trail product is deducted from the overall cost of the selected products and the transaction is completed 316 by payment. Payment may include cash, cheque, debit card or credit card.

Figure 4 shows the second option, flowchart 400, for this particular embodiment of the invention. Similar to flowchart 300, the customer identifies 402 themselves to the POS clerk. After identifying themselves to a POS clerk, the clerk proceeds to scanning all products selected by the customer 404. The information gathered from the scanning is transmitted to the centralised database 406.

In this particular option, the algorithm of processing the scanned information 408 differs from flow chart 300. The process automatically sorts the products into two types, products which are eligible to be a trial product

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and products which are not. When this process is completed, products which are eligible are then sorted from the least expensive to the dearest. When completed, the cost of the dearest product is then deducted from the overall cost of the selected products. This automatic processing allows the customer to select a number of trial products and allow the centralised database to automatically sort the dearest product and deduct the cost of the dearest product from the overall purchase.

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If the customer fails to select an eligible product, the request for authorisation for a trial product will be declined 410. Otherwise the process will be completed by the acceptance of the request for authorisation 412 and payment of the transaction 414.

Figure 5 shows a third option, flowchart 500 for this particular embodiment of the invention. Similar to flowcharts 300 and 400 the customer identifies 502 themselves to the POS clerk. Upon identification, the POS clerk proceeds to scanning all of products selected by the customer 504.

This particular option differs from the previous flowcharts, such that the customer completes the transaction by payment for the selected products 506 by either a debit/credit card. Preferably the debit/credit card would be affiliated with the trial marketing programme, or alternatively the debit/credit card is incorporated with the identification device.

The scanned information at the POS is transmitted to the centralised database 508 and processed to create an updated customer purchase record 510.

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The customer then accesses their customer purchase record 512 via an in-store customer terminal or by a remote customer terminal. While accessing their last transaction record, the customer designates a specific product to be a trial product 514. After successfully designating the trial product, the transaction record is updated 516. In this embodiment, the customer is given a specific time-limit (eg. 24 hours) to designate the trial product prior to processing of the debit/credit card transaction. This particular option may suit a customer who may be in a rush and wishes not be pressured into deciding which of the selected products to designate as the trial product.

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Figure 6 shows a third option, flowchart 600 for this particular embodiment of the invention. Similar to flowcharts 500 with the customer identifies 602 themselves to the POS clerk. Upon identification, the POS clerk proceeds to scanning all of products selected by the customer 604 and completes the transaction at the POS customer by paying for the selected products 608. Scanned information is transmitted to a centralised database 610 and then processed and recorded on the centralised database 612. The customer accesses their transaction record 614, as discussed earlier by using either the in-store customer terminal, or the remote customer terminal. While online and reviewing the last transaction, the customer decides which of the eligible products they wish to designate as a trial product 616.

Instead of adjusting the transaction record and deducting the cost of the trial product from the overall total, the customer requests a rebate 618.

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Upon receiving the rebate details such as a rebate number, the customer can returns to the retail outlet and collects their rebate 620.

In another embodiment of the invention, a customer purchase record for a programme member can be reset or cleared after a period of time. For example, a customer purchase record (i.e. transaction history) can be reset after a two year period and provides an incentive for a programme member remain within the programme.

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As person skilled in the art would appreciate, the hereinbefore described invention provides manufacturers and retailers with a marketing tool which could be used to promote new and existing products. In addition, customers are provided with a real incentive to sample new or premium products, if certain conditions are satisfied, for free.

Throughout the description and claims of this specification, the word "comprise" and variations of that word such as "comprises" and "comprising", are not intended to exclude other additives, components, integers or steps.

Throughout the specification the aim has been to describe the invention without limiting the invention to any one embodiment or specific collection of features. Persons skilled in the relevant art may realize variations from the specific embodiments that will nonetheless fall within the scope of the invention.

CLAIMS:

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1. A method for providing a customer a trial product, said method comprising the following steps:

selecting one or more products to be purchased, each said product having a product identification;

designating at least one of said one or more products as a trial product;

receiving a customer identification from the customer;

comparing said product identification and said customer identification

to a customer purchase record; and

if said trial product has not been purchased and/or designated previously, deducting a cost of said trial product from an overall cost of transaction.

- The method as recited in claim 1, wherein said product identification is
 determined at a point-of-sale.
 - 3. The method as recited in claim 1, wherein said product identification is determined by a bar code scanner.
 - 4. The method as recited in claim 1, wherein said customer identification is a credit card or a customer loyalty card.
- 5. The method as recited in claim 1, wherein said customer identification is a radio frequency identification card.
 - 6. The method as recited in claim 1, wherein said customer requires spending a minimal amount as a condition for having the cost of said trial product deducted from said overall cost of transaction.

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- 7. The method as recited in claim 1, wherein said customer can access said customer purchase record at a remote customer terminal.
- 8. The method as recited in claim 1, wherein said customer can access said customer purchase record at an in-store customer terminal.
- 5 9. The method as recited in claim 1, wherein said customer purchase record is maintained at a centralised database.
 - 10. The method as recited in claim 1, wherein said customer purchase record is maintained at a local database.
 - 11. The method as recited in claim 9, wherein an authorisation request for said trial product is transmitted to said centralised database.
 - 12. The method as recited in claim 10, wherein an authorisation request for the trial product is transmitted to said local database.
 - 13. The method as recited in claim 1, wherein said customer selects said products to be purchased and designates said trial product on-line.
- 15 14. A system for providing a customer a trial product, said system comprising:
 - a product identification device for collecting product identification, wherein said customer selects one or more product to be purchased and designates at least one a trial product;
- 20 a customer recognition device for receiving customer identification; and

a database having a customer purchase record, signally connected to said product identification device and customer recognition device;

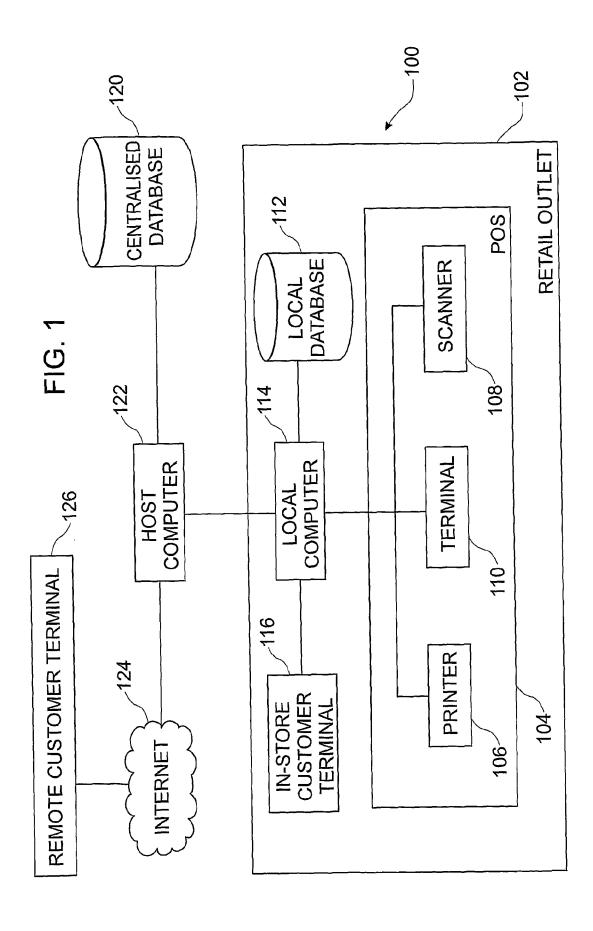
wherein said product identification and customer identification is compared to said customer purchase record, such that if said trial product has not been purchased and/or designated previously, cost of said trial product is deducted from an overall cost of transaction.

5 15. The system as recited in claim 14, wherein the system includes an instore terminal which allows said customer access to said customer purchase record.

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- 16. The system as recited in claim 14, wherein the system includes a remote customer terminal which allows said customer access to said customer purchase record.
- 17. The system as recited in claim 14, wherein said customer requires spending a minimal amount as a condition for having said cost of said trial product deducted from said overall cost of transaction.
- 18. The system as recited in claim 14, wherein said customer purchase record is maintained at a centralised database.
- 19. The system as recited in claim 14, wherein said customer purchase record is maintained at a local database.
- 20. The system as recited in claim 14, wherein said customer selects said products to be purchased and designates said trial product on-line.



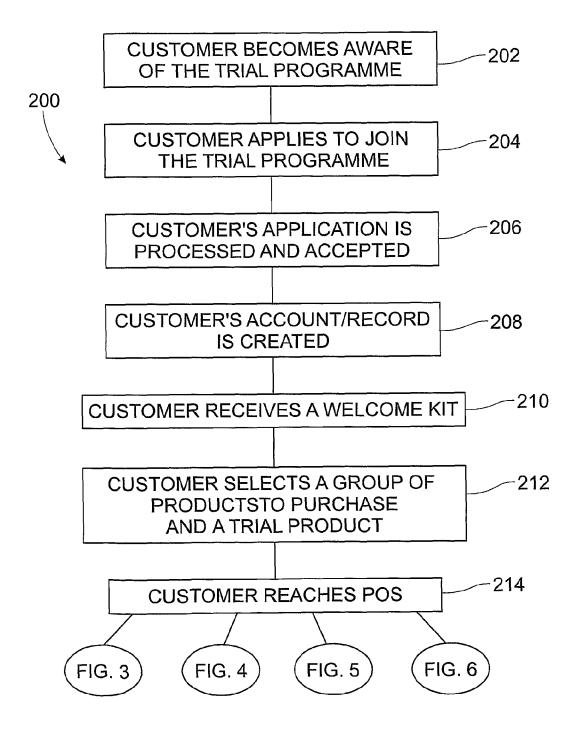


FIG. 2

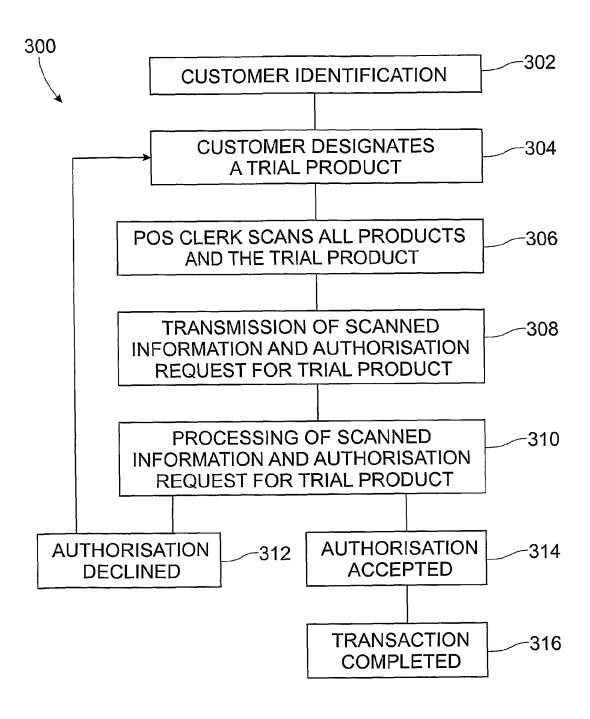


FIG. 3

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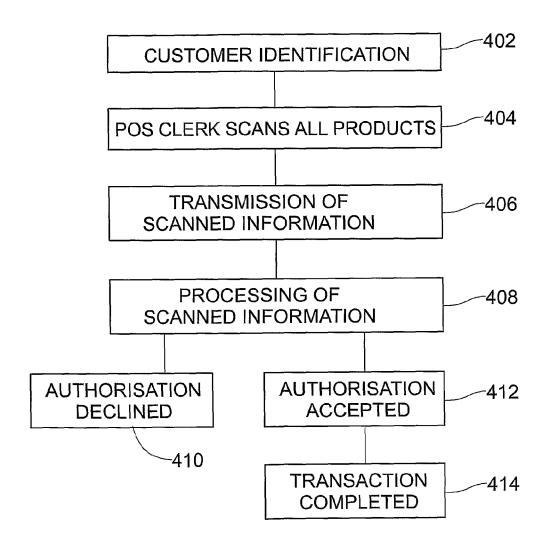


FIG. 4

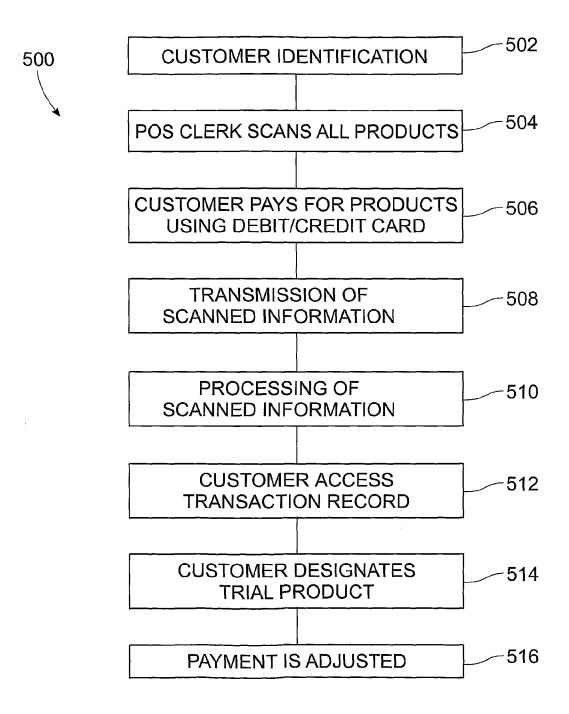


FIG. 5

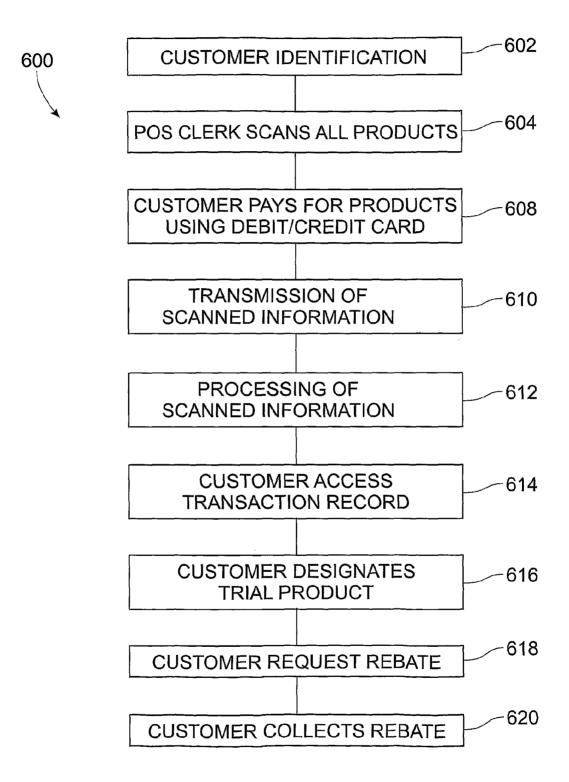


FIG. 6

INTERNATIONAL SEARCH REPORT

International application No.
PCT/AU2007/000009

| A. CLASSIFICATION OF SUBJECT MATTER | | | | | | | | | |
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| Int. Ci. | | | | | | | | | |
| G06Q 30/00 (2006.01) | | | | | | | | | |
| According to International Patent Classification (IPC) or to both national classification and IPC | | | | | | | | | |
| B. FIELDS SEARCHED | | | | | | | | | |
| Minimum documentation searched (classification system followed by classification symbols) | | | | | | | | | |
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| Electronic data base consulted during the international search (name of data base and, where practicable, search terms used) WPAT, USPTO (Free, Trial, Sample, Selection) | | | | | | | | | |
| C. DOCUMENTS CONSIDERED TO BE RELEVANT | | | | | | | | | |
| Category* | Citation of document, with indication, where appropriate, of the relevant passages | | | | | | | | |
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| F | urther documents are listed in the continuation | of Box C X See patent family annex | | | | | | | |
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INTERNATIONAL SEARCH REPORT

Information on patent family members

International application No.

END OF ANNEX

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| Patent Document Cited in Search Report | | Patent Family Member | | | | | | | | |
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| US | 5924080 | | NONE | | | | | | | |
| US | 5918211 | AU · | 2618200 | wo | 0043912 | | | | | |
| Due to | Due to data integration issues this family listing may not include 10 digit Australian applications filed since May 2001. | | | | | | | | | |