FIELD AGENT®

Retail Audits & Real-time Shopper Insight

BOL

KEY TAKEAWAYS

How to evaluate key measures of success – Total Shopper Journey

- ✓ Pre-store – Attitudes and perceptions
- ✓ Impact of in-store placement
- ✓ Influence of pack design and core messages
- ✓ How effectively did the product meet expectations.

Faster. Cheaper. Smarter.

What % Shoppers decide what product to buy at fixture?

Average across grocery Categories in 2022

A	B	C	D	E
> 20%	20 – 40%	40 - 60%	60 – 80%	80 – 100%

How well do you understand Shopper behaviour In-store?

A	B	C	D
Not at all well	Quite well	Very Well	Completely

Not just WHAT they buy , but WHY?

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How we can help

We deliver Total Shopper Insight

- How well are products displayed in store?
- What has most impact at point of purchase?
- What will Shoppers buy and why?
- How well are you delivering customer satisfaction?
- Online Ratings and Reviews

Integrate Retail Audits & Real-time Shopper Insight

- Founded in 2010, UK 120,000+ Agent downloads
- USA, Canada, Mexico, Ecuador, South Africa, Australia
- Spain and Partnership with POS Pulse across Europe
- Strategic partnerships with major brands and retailers

Global leaders in crowdsourced Shopper research

Crowdsourced Model: Shoppers Download Free App and Earn Cash

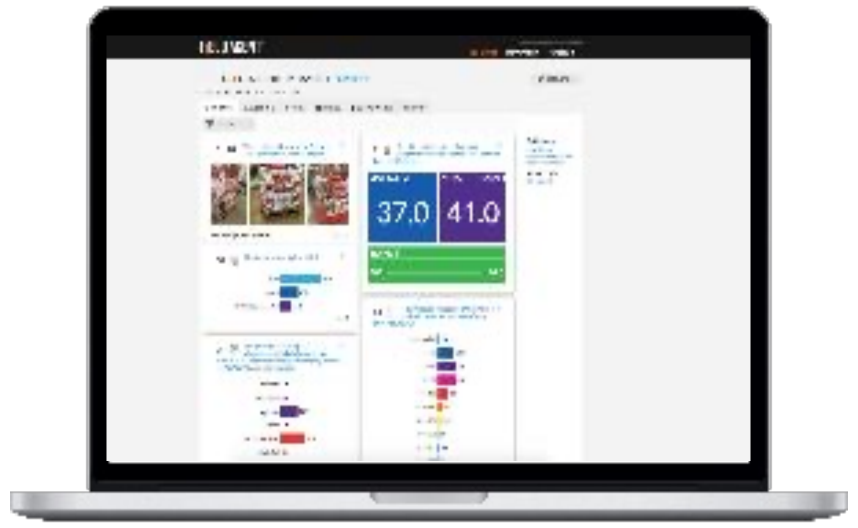
Shoppers

↓

Free App

↓

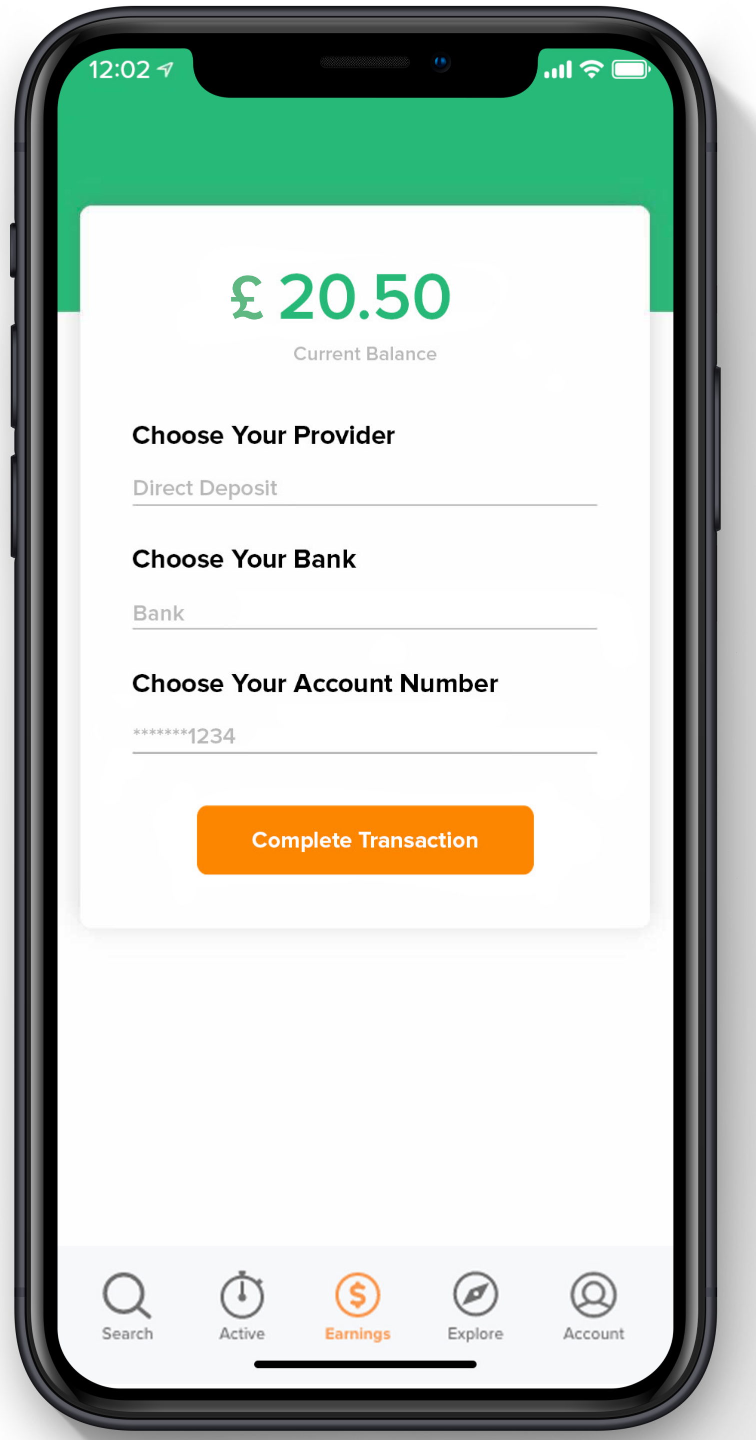
Realtime Results



UK Coverage

Reserve Jobs

Weekly Cashout



Quality Control

GPS Marker

Time and Date Stamp

Photo and Video Verification

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Our Shoppers can tell you..

What's on Display

Retail Audits

- Promotions
- Pricing
- On-Shelf Availability
- Display Compliance
- Planogram Compliance

What they Buy and Why

Shopper Insights

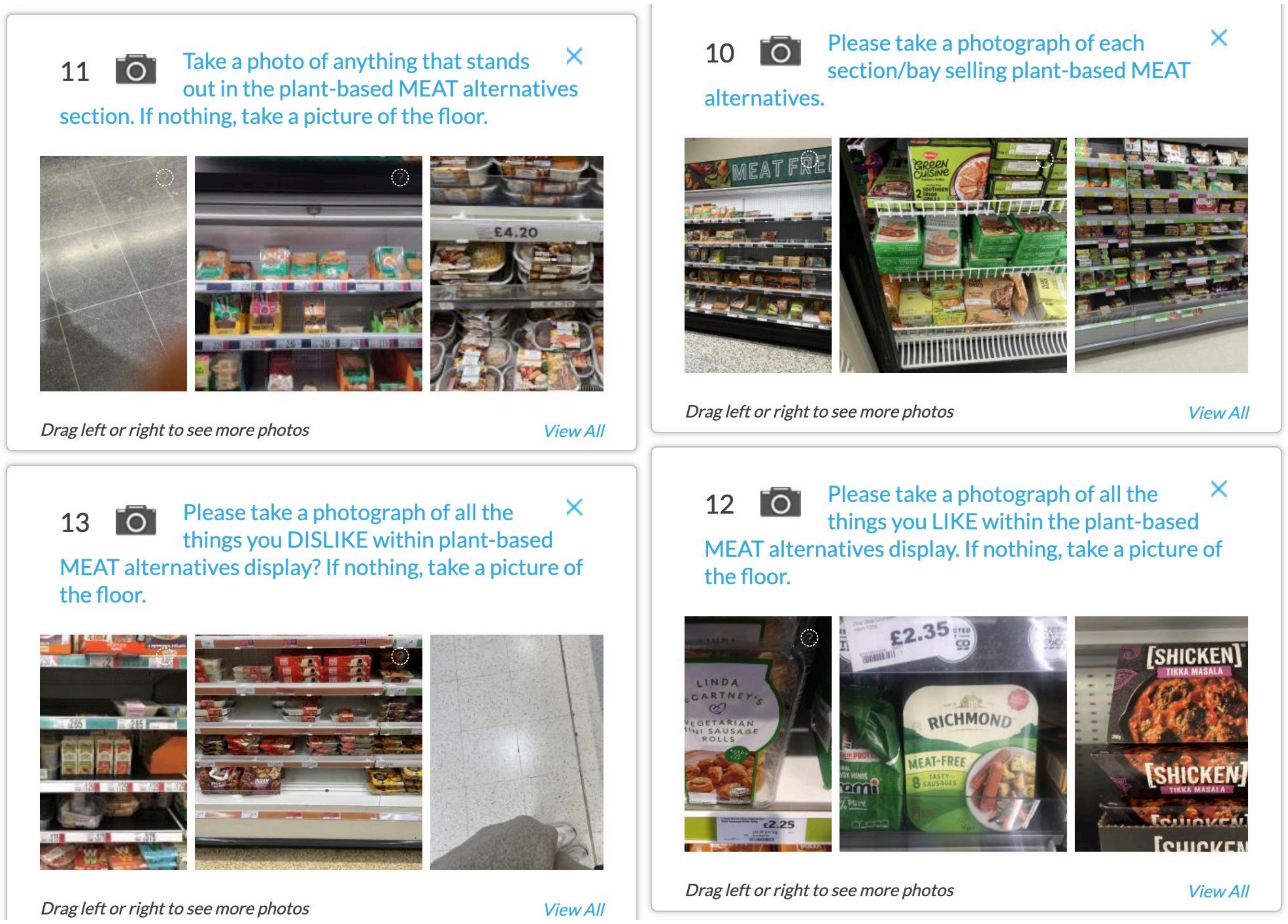
- Mystery Shop
- Competitive Analysis
- Shelf Impact
- Product Insights
- Buy and why

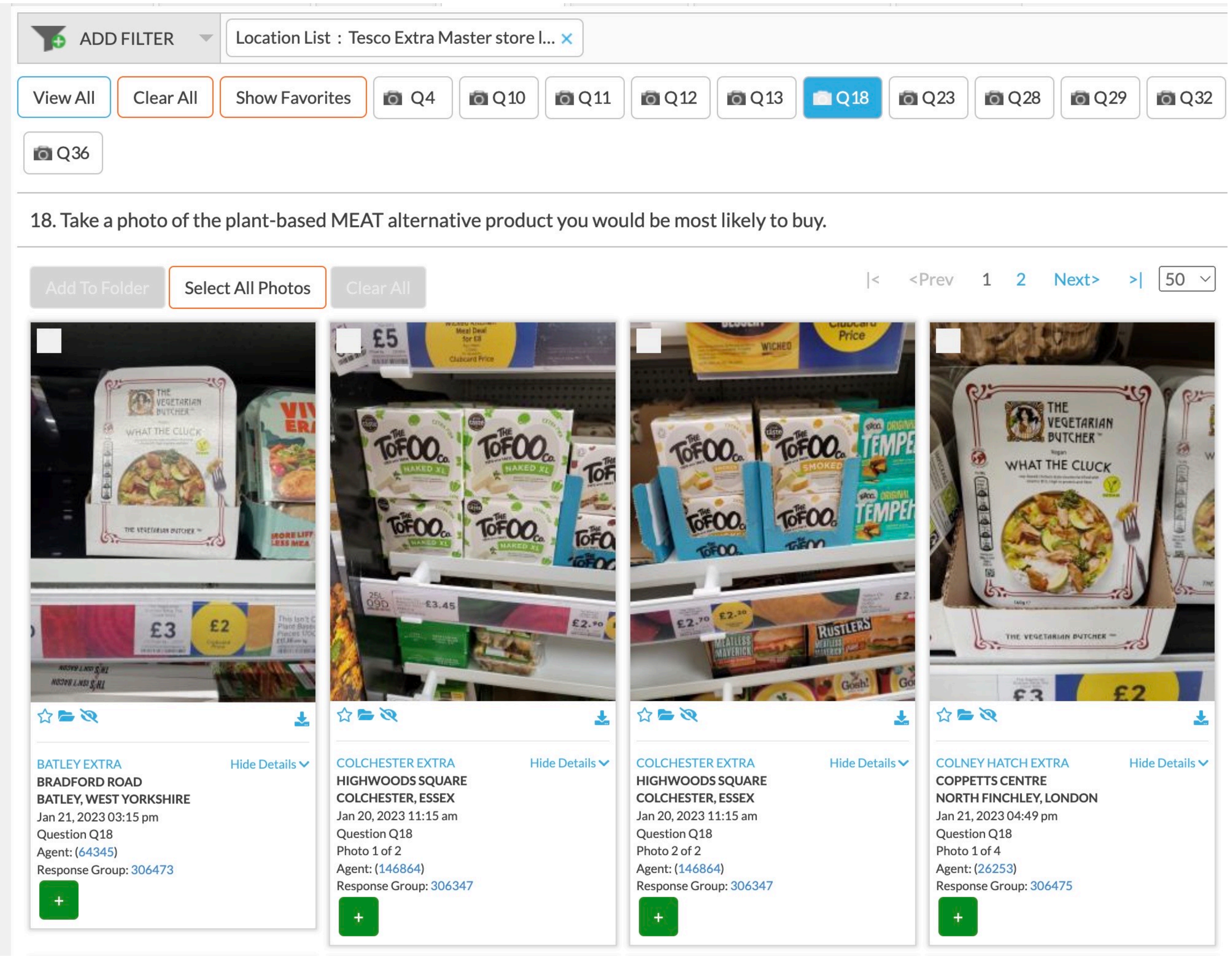
What they like and Recommend

In Home

- Buy & Try
- Customer Feedback
- Ratings & Reviews

Field Agent dashboards





Retail Audits : AI provides full category visibility

See all visits in detail, including individual and stitched images

Online reports and **interactive dashboards** provide **real-time metrics** including:

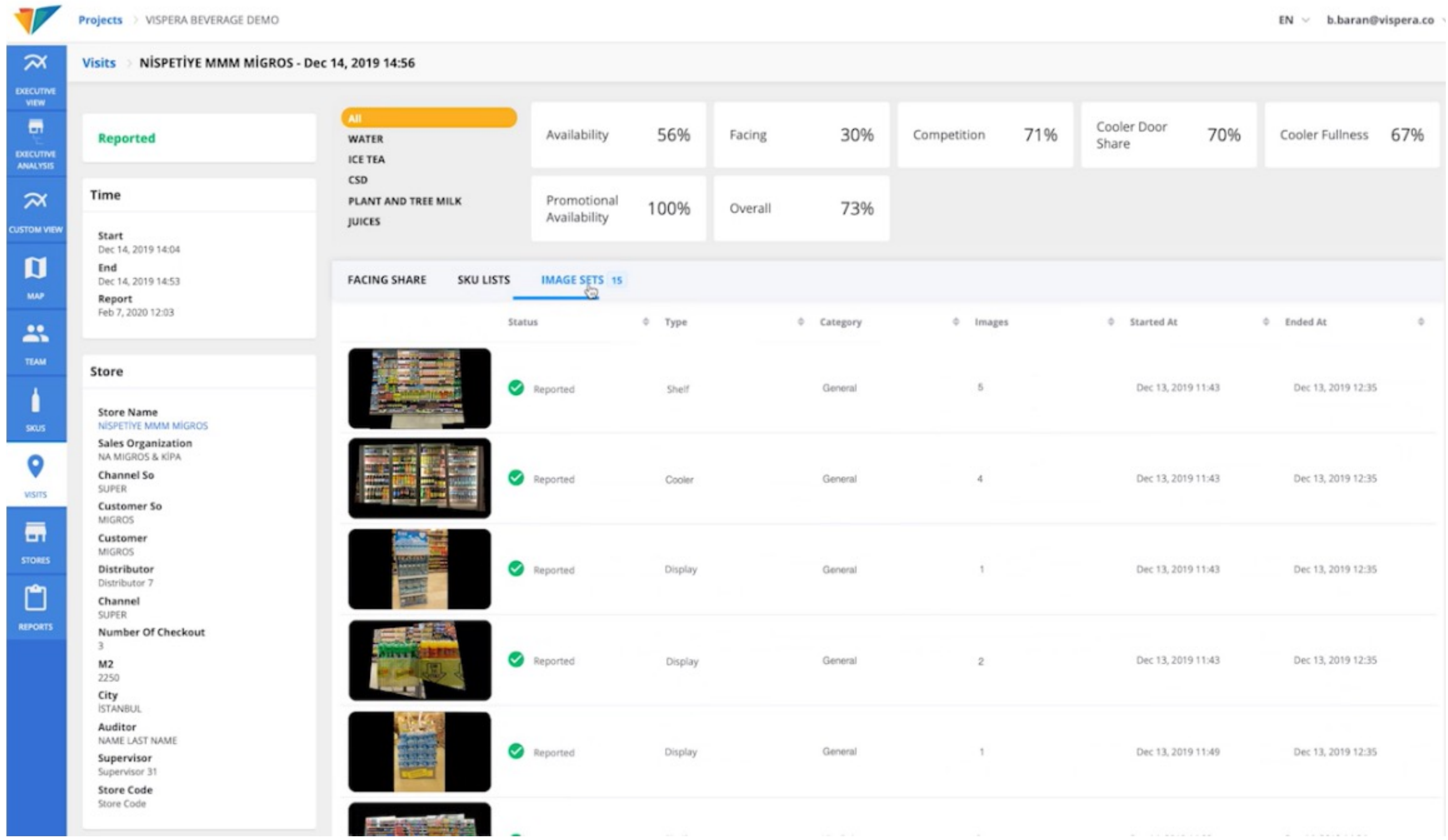
- Distribution
- Number of facings
- Share of shelf
- Available vs. Out-of-Stock
- Actual shelf price

Compare on shelf metrics across the full category including your competitors

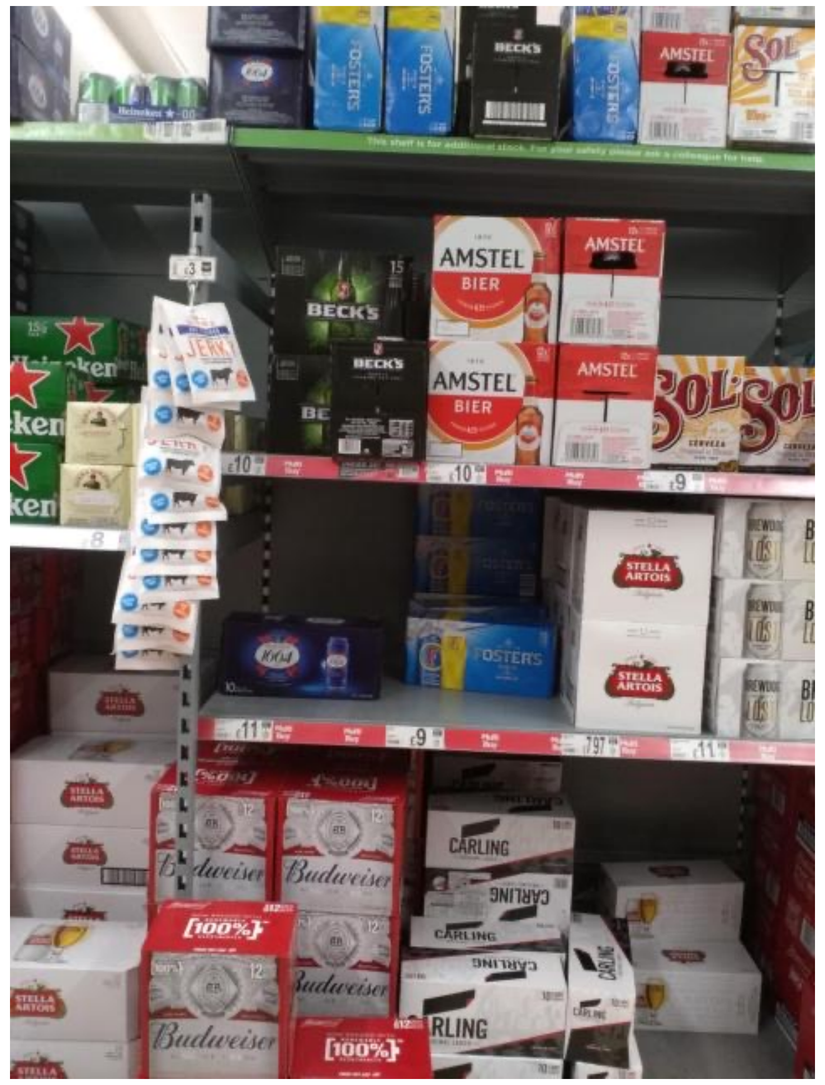
95%+ data accuracy at **SKU** Level

KPIs reported at all level:

- Category
- Manufacturer
- Brand Product
- All Competitors
- Individual Visits



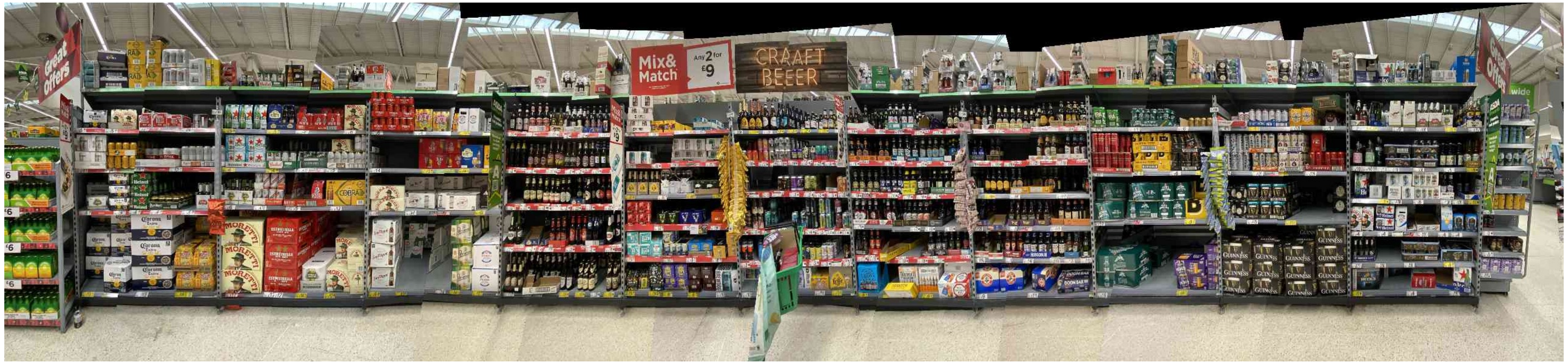
Images Converted to Realograms



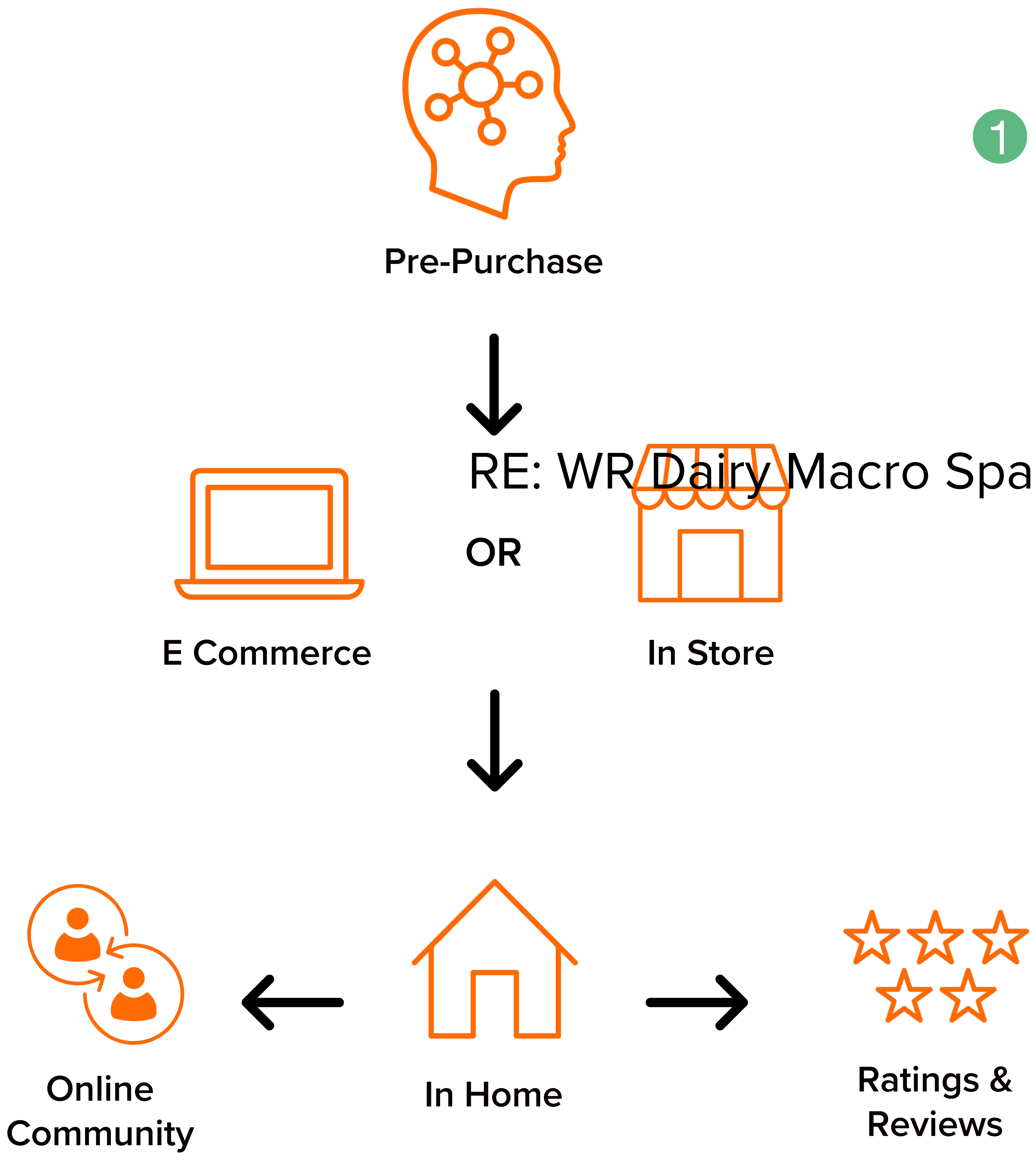
Multiple images are taken to cover the entire fixture

Images are stitched together

Realograms are created for each bay/unit



Total Shopper Insight



RE: WR Dairy Macro Space Brief

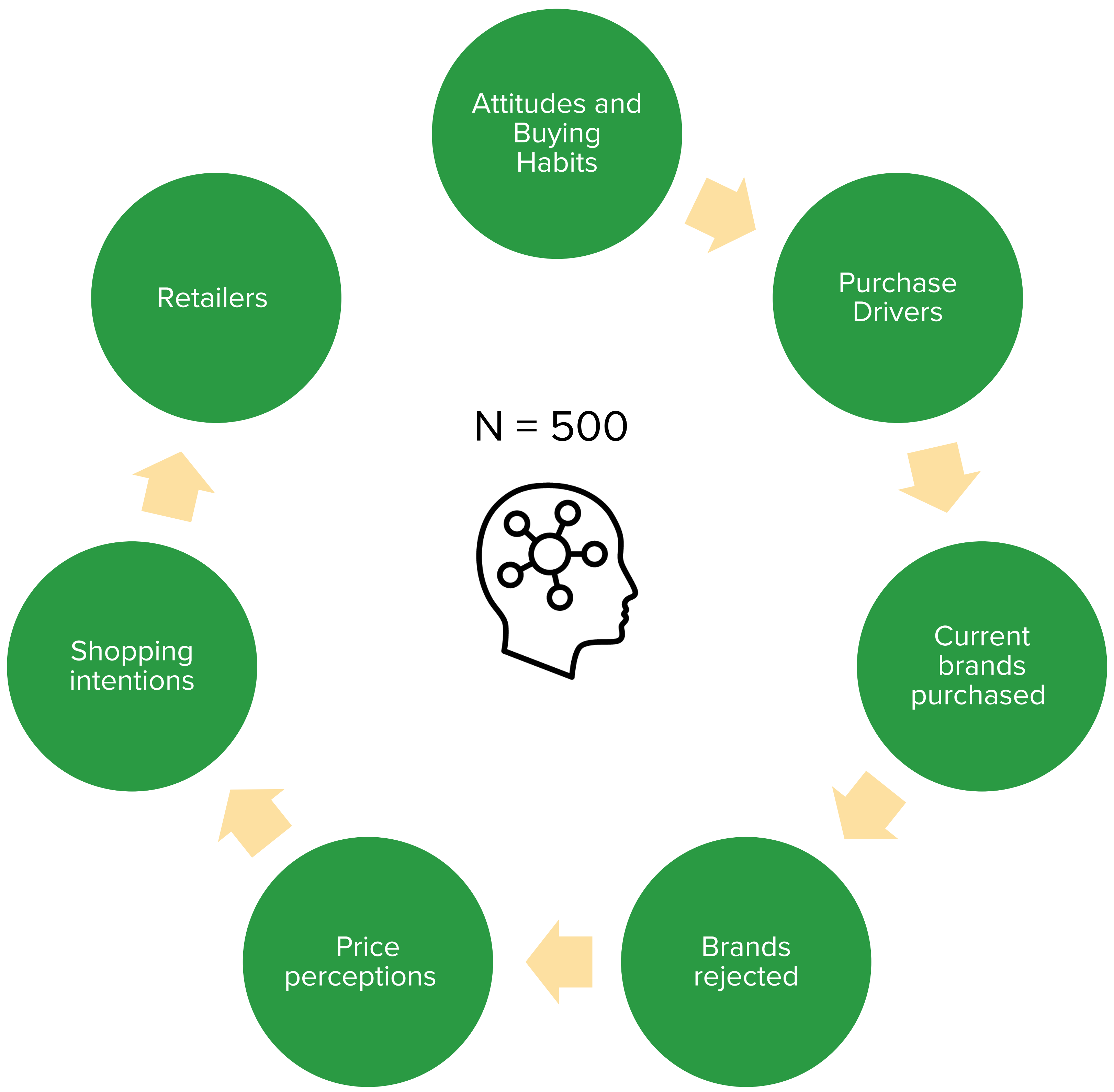
1. Establish Shoppers current behaviour and attitudes before going in store

2. Shopper report on experience what they would buy and why?

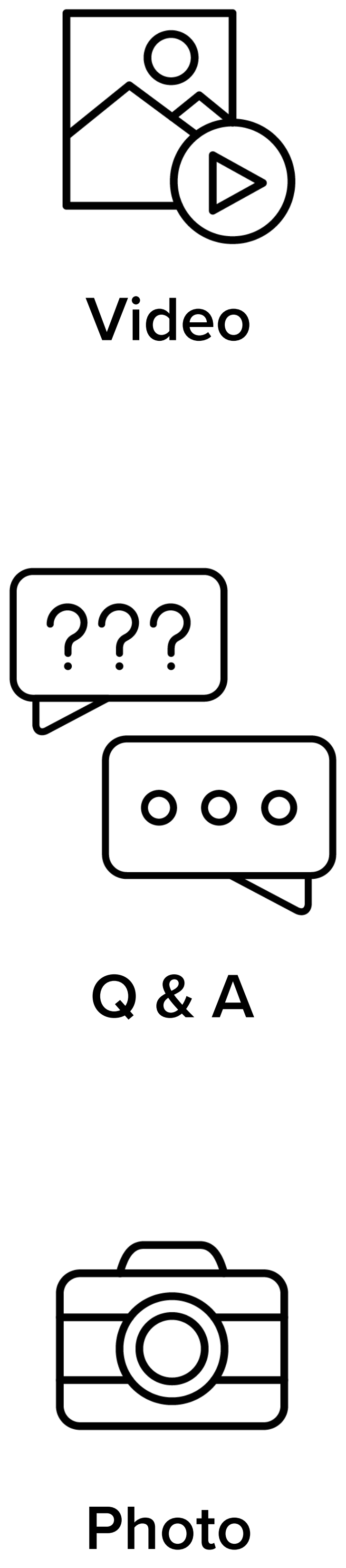
3. Shoppers try products at home and report on experience

What Shoppers Think and What They Do Instore?

Intention: What would Shoppers **think** PRE store?



Pre-Store



Reality: What would Shoppers **do** IN store?

In Store

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Smartphones for natural Shopper feedback
Fast, reliable, in-the-moment insights

In Store Insight

What Shoppers would buy and why

Mystery Shop

Shelf impact

Product Choices

Buy and Why

Ideas to improve

Showreel

Buy, Try, Ratings & Reviews

IDENTIFY BARRIERS TO PURCHASE (IN STORE)

That might be adversely affecting reviews

STIMULATE PRODUCT TRAIL AND SHOPPER FEEDBACK

Reimburse product cost and bounty for performing task

RATINGS AND REVIEWS:

Shoppers invited to post genuine feedback on retailer website

Total Shopper Insight : Typical project scope

Existing Behaviour: Usage and Attitudes

Pre-Purchase

Survey to 250 - 500

Up to 25 questions

Open and Closed, Photos

£3,500

Shopping Experience: Availability and Impact

In Store/ecommerce

100 Store visits

(25 with video)

Open & Closed

Up to 30 questions

£10,000

User Experience: Preparation, Consumption and Assessment

In Home + Ratings

25 In Home

Video + Photos

Closed Open questions

Up to 20 questions

£3,250

Analysis and Reporting

Analysis includes

PPT presentation

Analysis, cross tabs

Coding and Quotes

Charts with Photos

Video transcription

and Store edit

Nutritionally Complete Meal Drinks 2023

- Understanding the consumer expectation vs the reality of the nutritionally complete category with a focus on BOL Power Shakes in particular
- Clarity on category target shopper (most open to nutritionally complete meals)
- Gain knowledge of our in-store shopper mission
- Gather moment of truth insights at shelf
- Shopper feedback on product experience

Total Shopper Insight

1. Establish Shoppers current behaviour and attitudes before going in store

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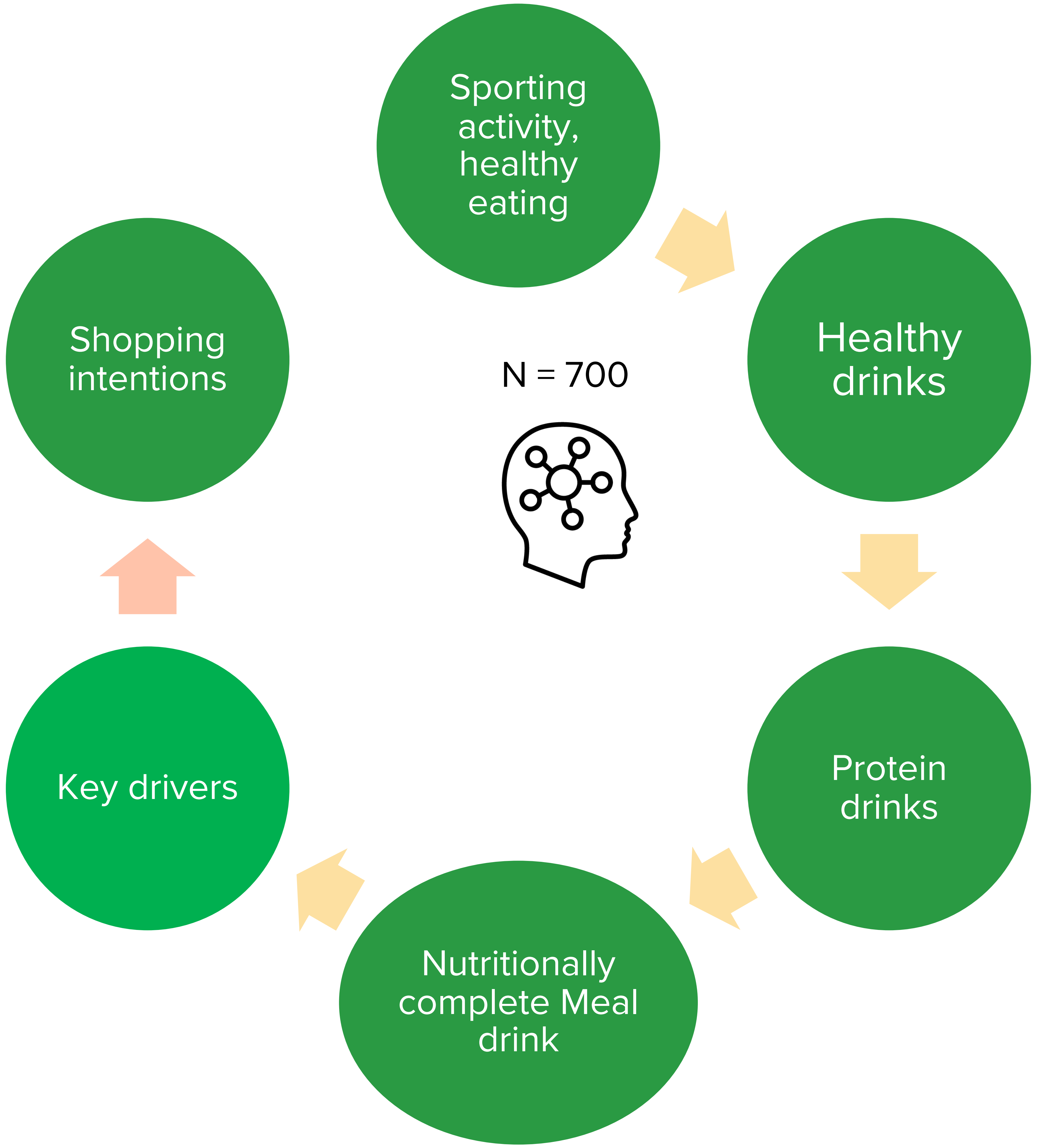
What Shoppers Think before they go Instore?

Intention: Think PRE store?



More men (71%) buy a heathy drink at least weekly than women (61%)

Bottled water most frequently bought daily.

n = 699

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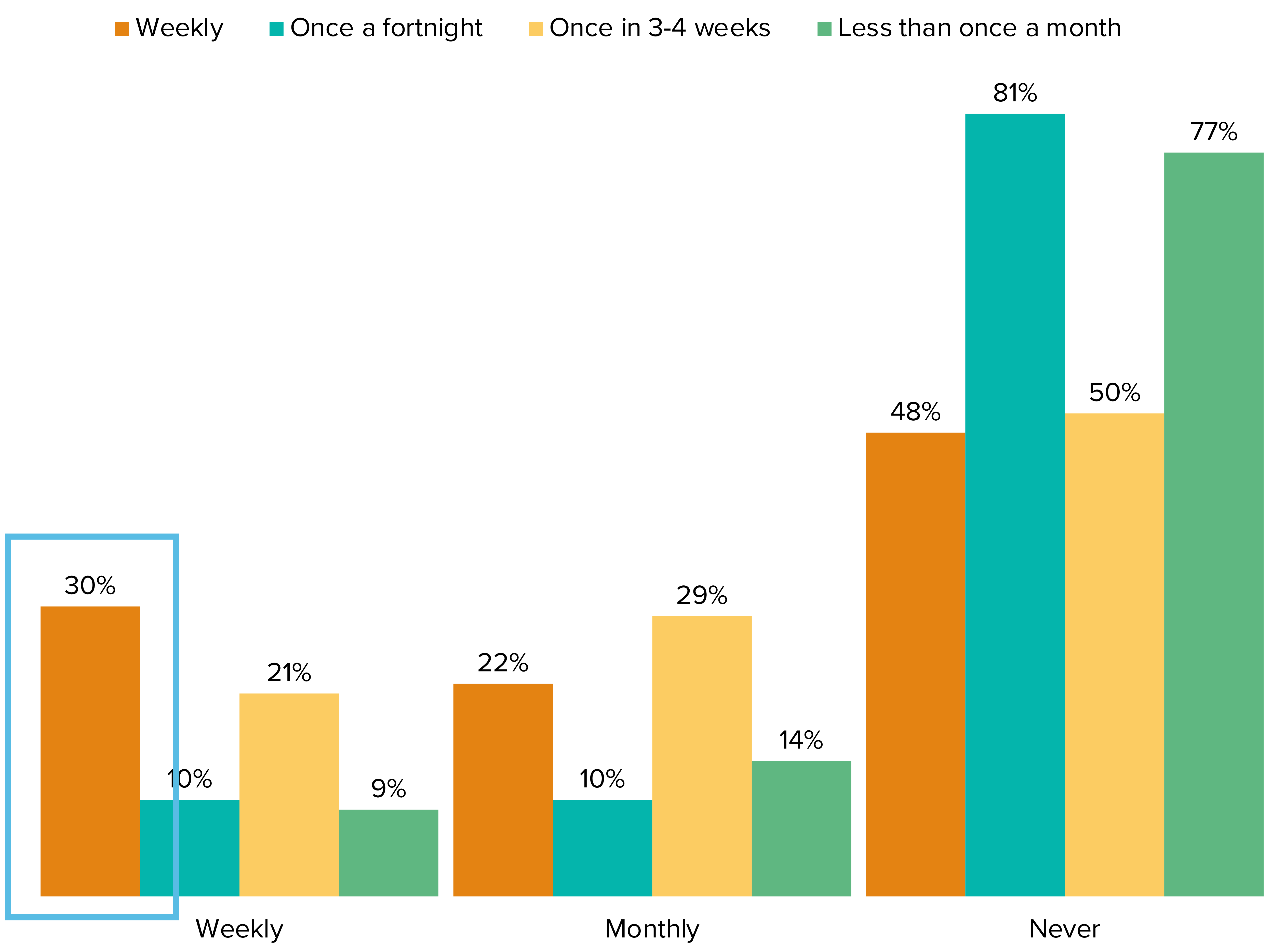
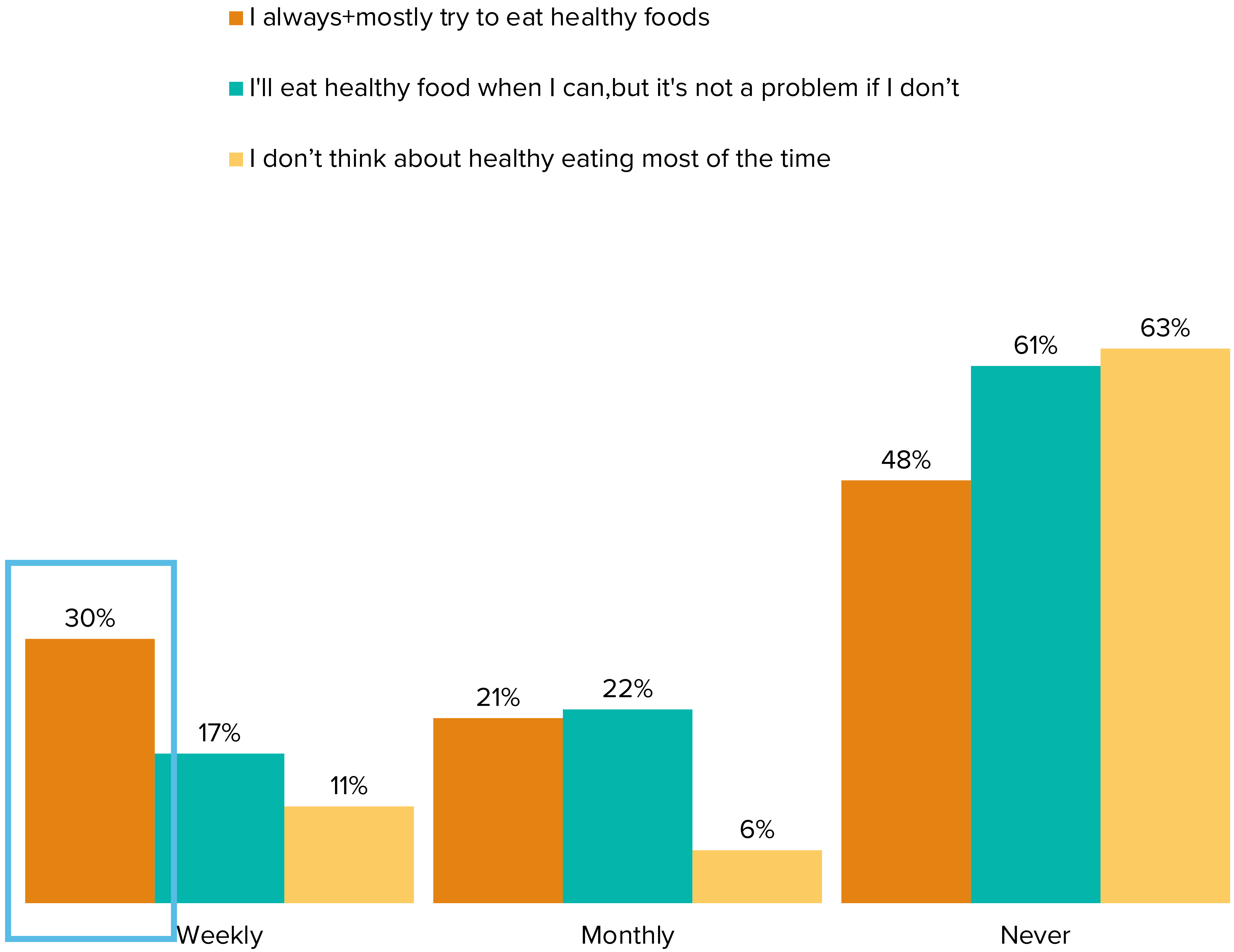
Regular Sport and focus on Healthy eating most likely to buy NCMD weekly

Q9: How regularly do you purchase Nutritionally Complete Meal drinks? – Split by how regularly they participate in Sporting activity



n = 698

Q9: How regularly do you purchase Nutritionally Complete Meal drinks? Split by their attitude towards healthy eating



n = 698

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NCMD Key barriers: cost, unhealthy, taste not proper meal

Q11: Why would you not consider buying Nutritionally Complete Meal drinks

But half of those who had not tried would consider

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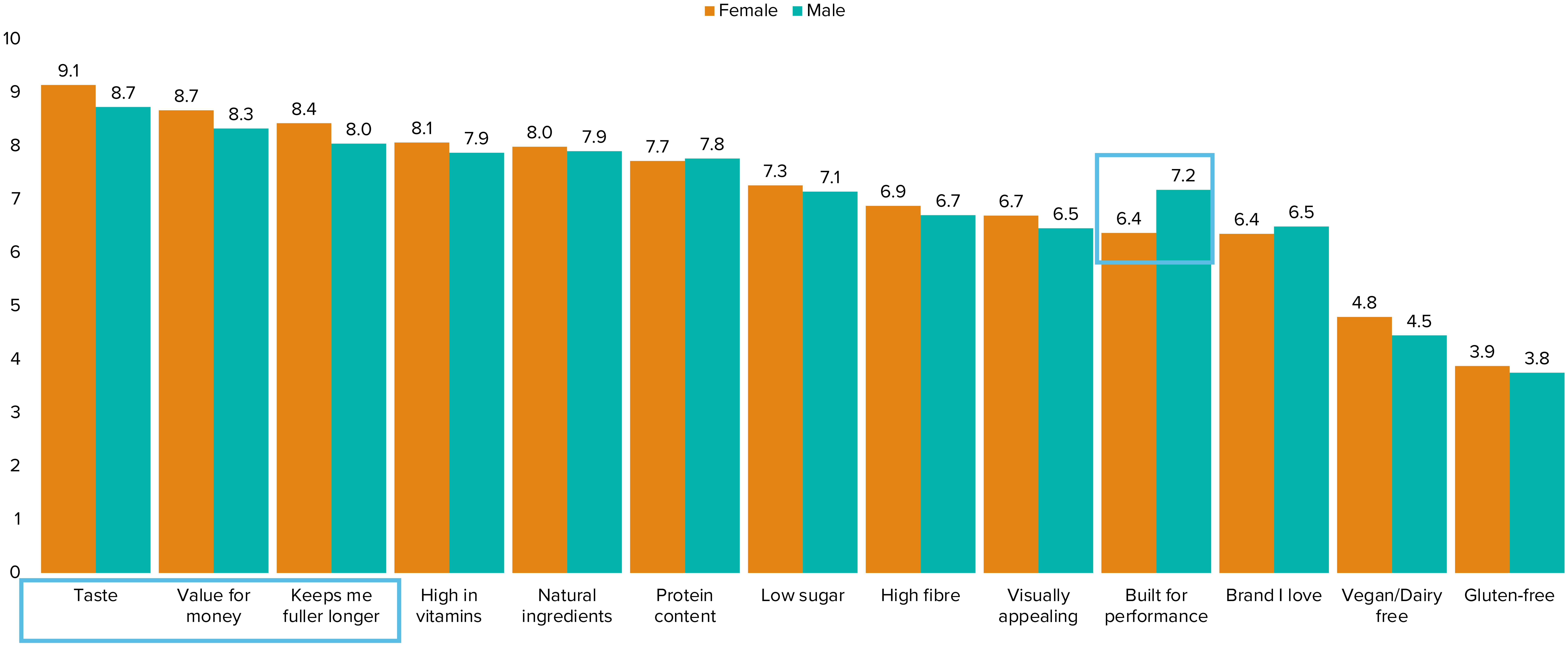
Choosing what to buy driven by Taste, VFM, keeps full and ingredients (performance for men); Least important vegan/dairy free, gluten-free

Q20: What is the relative importance of the following factors in choosing which Nutritionally Complete Meal drink to buy? (Please rate each on a scale of 1 to 10, (where 1 is "Not at all important" and 10 is "Very Important")



n = 486

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Pre-Store headlines : Attitudes and perceptions of NCMD

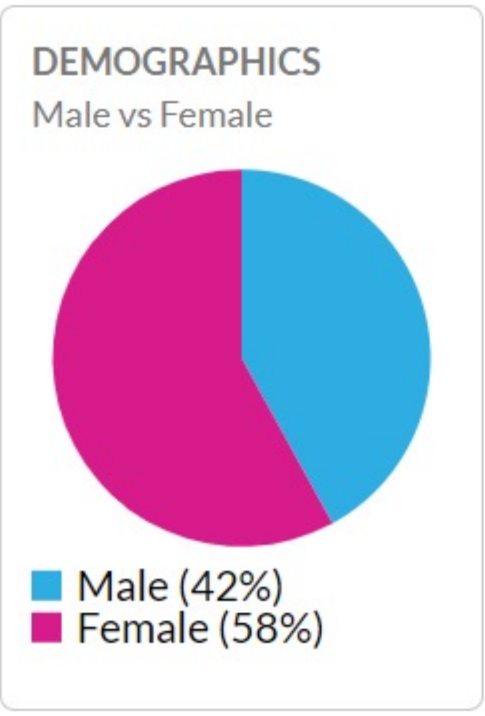
Sample of Shoppers selected are generally active and health conscious:

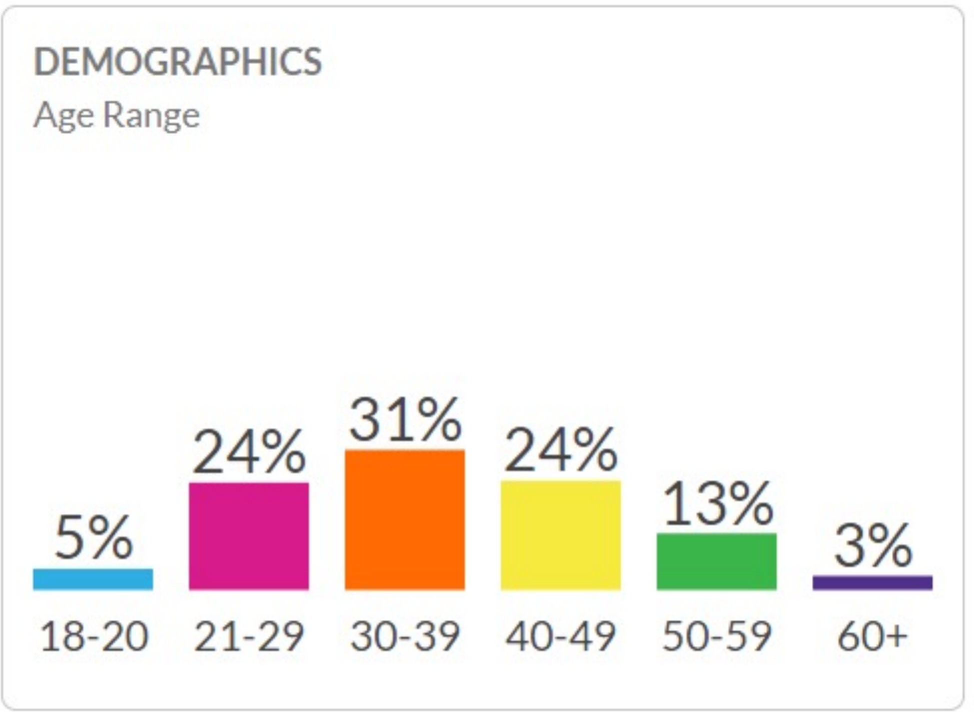
- Protein drinks been tried more than NCMD : both more popular among men, **half of those not tried would consider**
- More likely to be bought more frequently by those doing sport and with a focus on healthy eating
- Purchase drivers: Taste, Complete meal, Convenience
- Key barriers: Cost, Unhealthy, Taste, not Proper meal
- Despite relatively low brand awareness BOL has strong intention to buy

But what will be the reality when Shoppers go instore

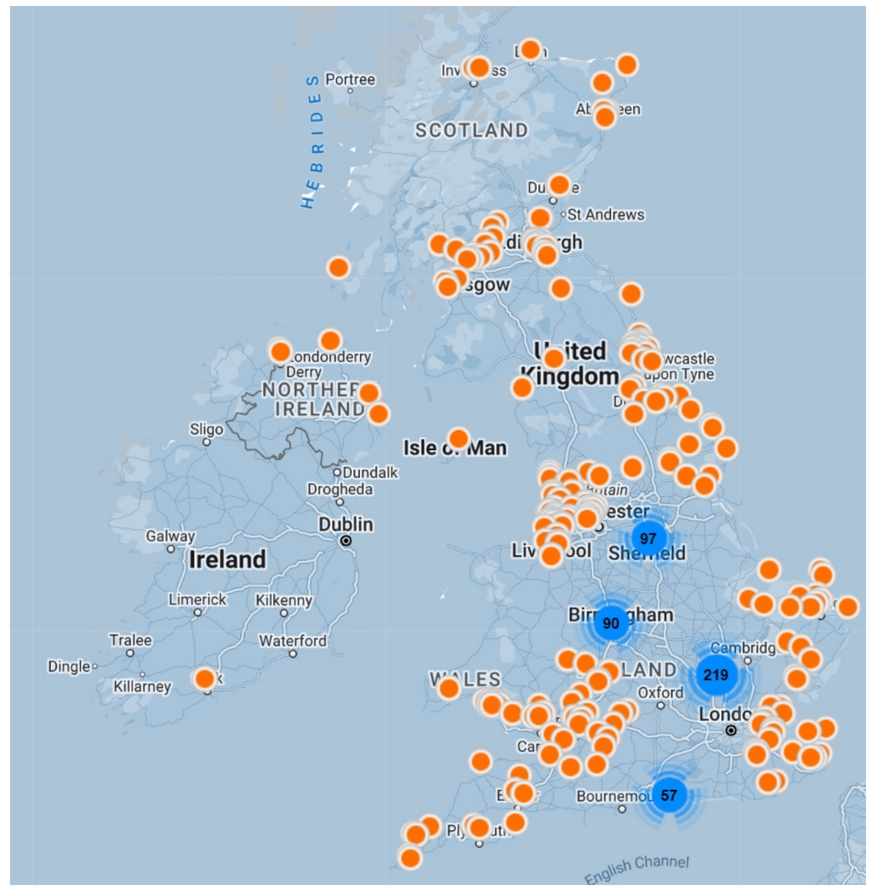
N = 700

Reality: What would Shoppers do Instore?





Core Shoppers across the UK

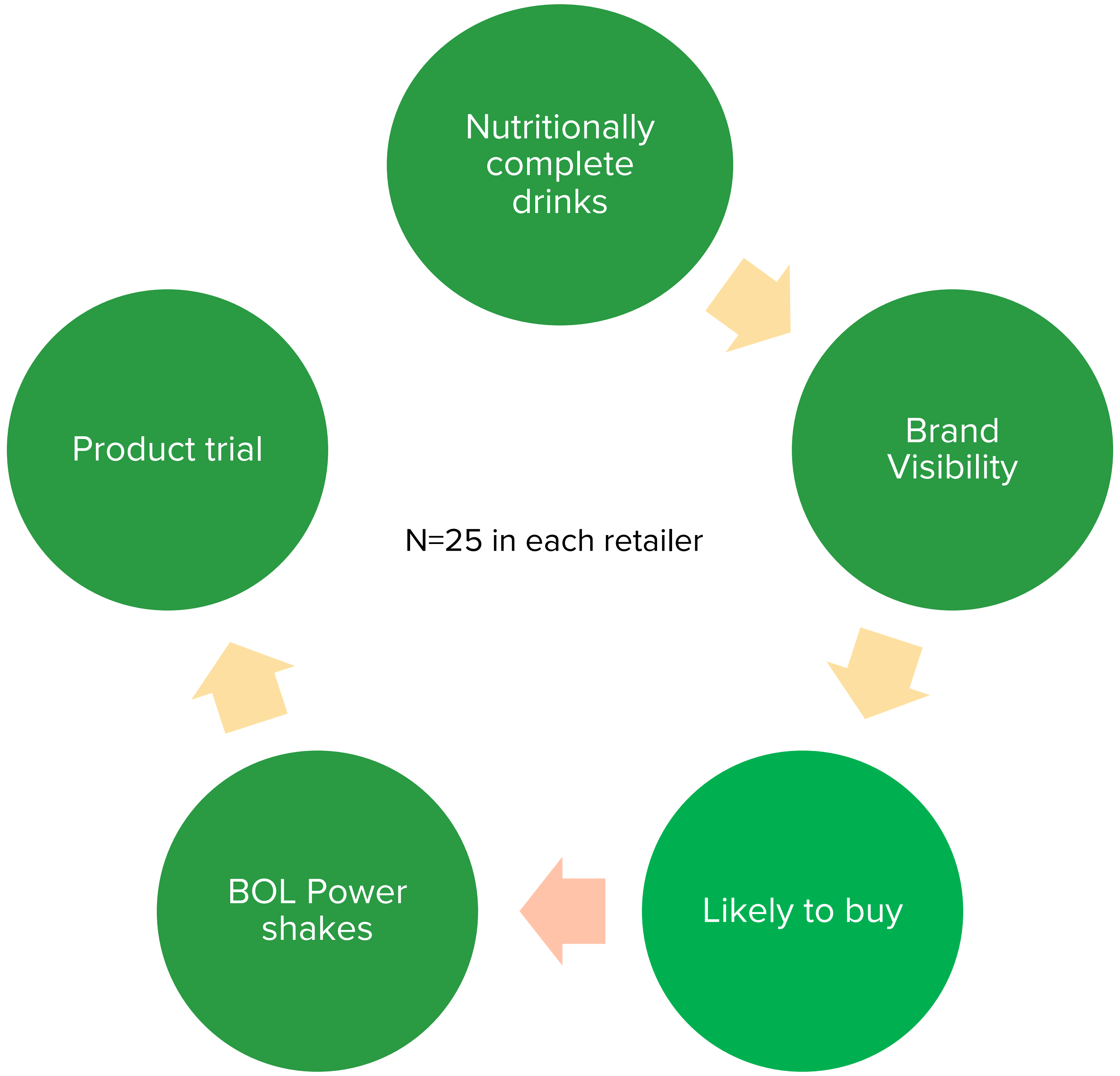


Video

Q & A

Photo

TESCO Sainsbury's Waitrose



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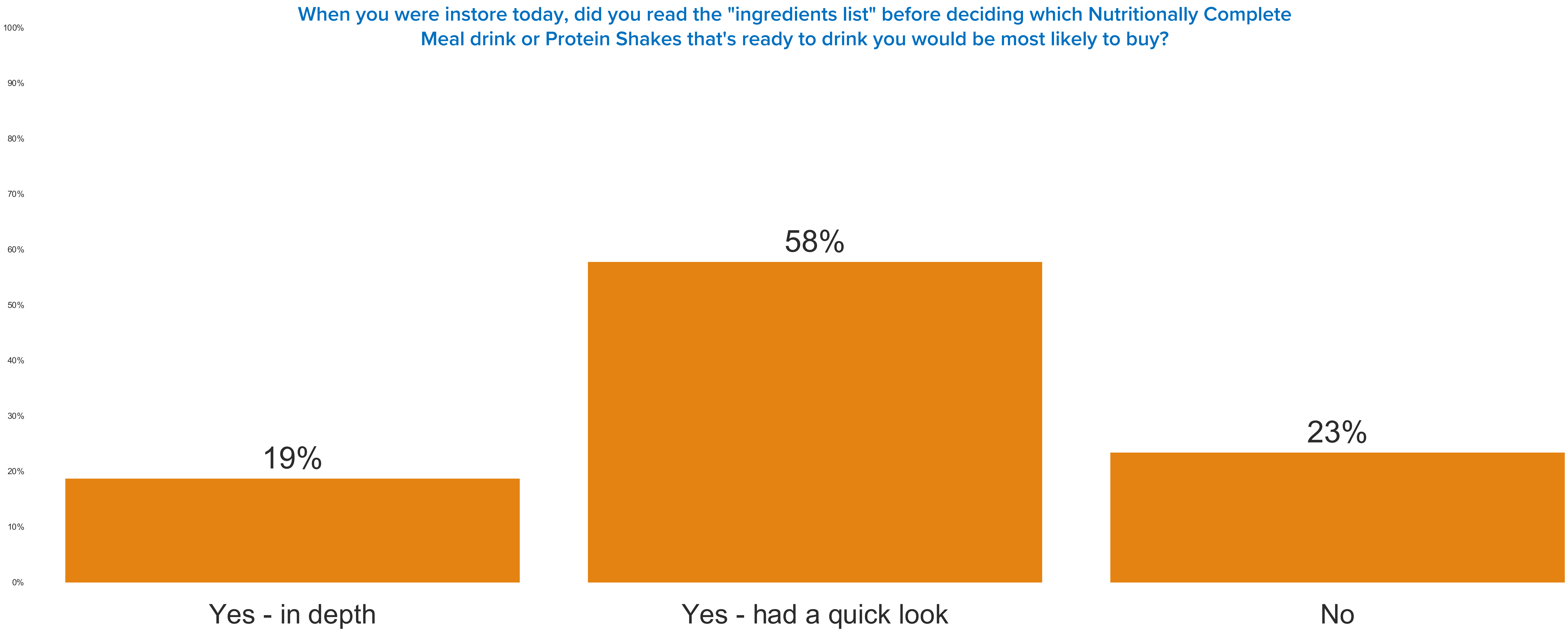
Majority check ingredients to discover Health benefits, like the fact ingredients are listed on front….a few felt no need



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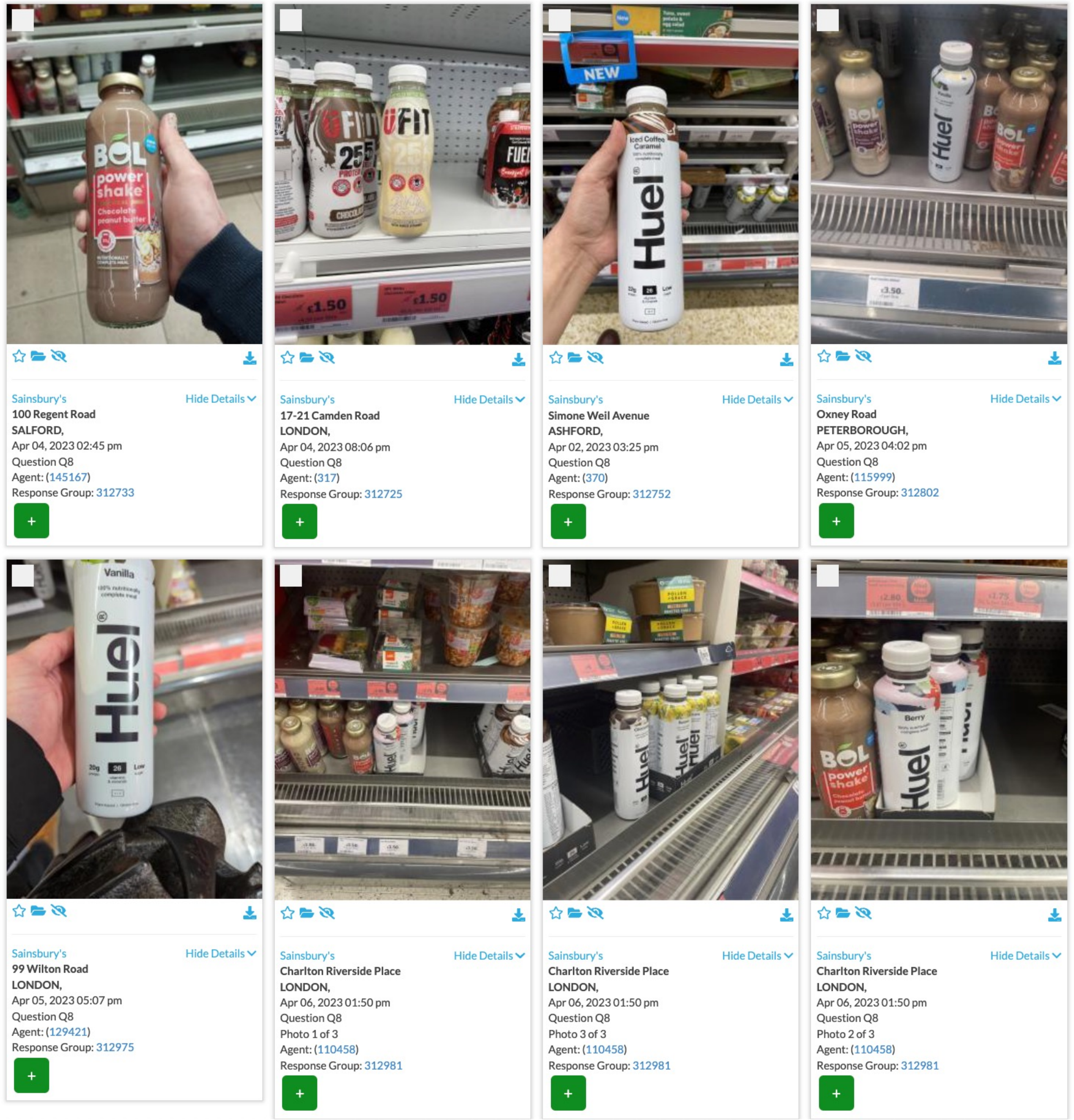
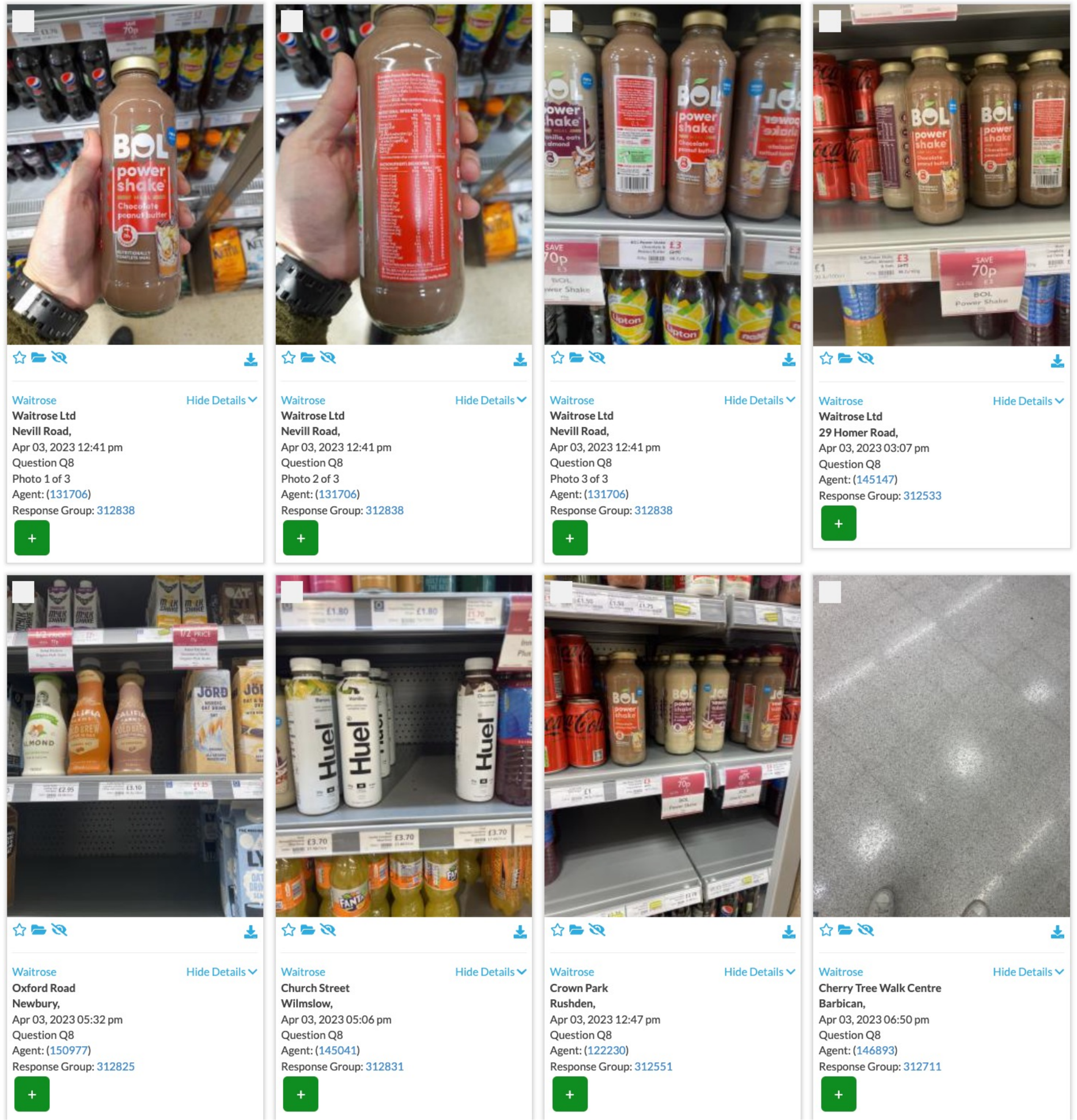
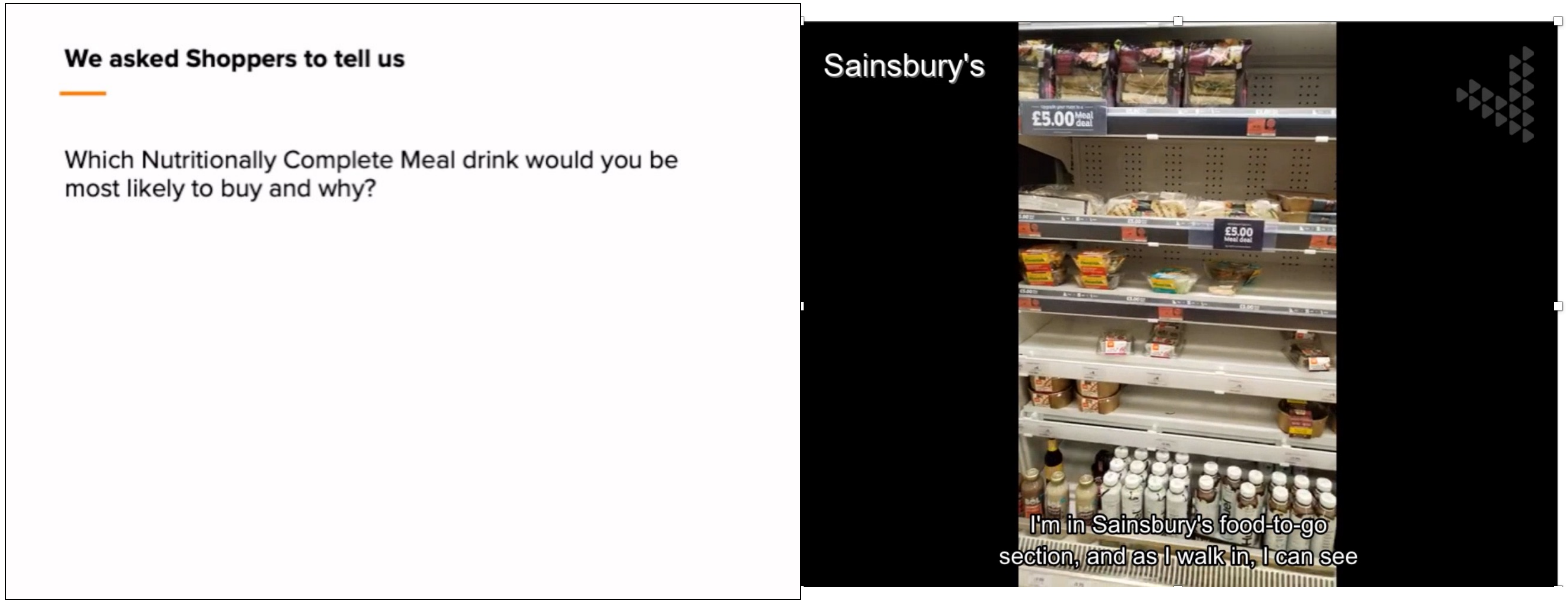
Product you would be most likely to buy – by store





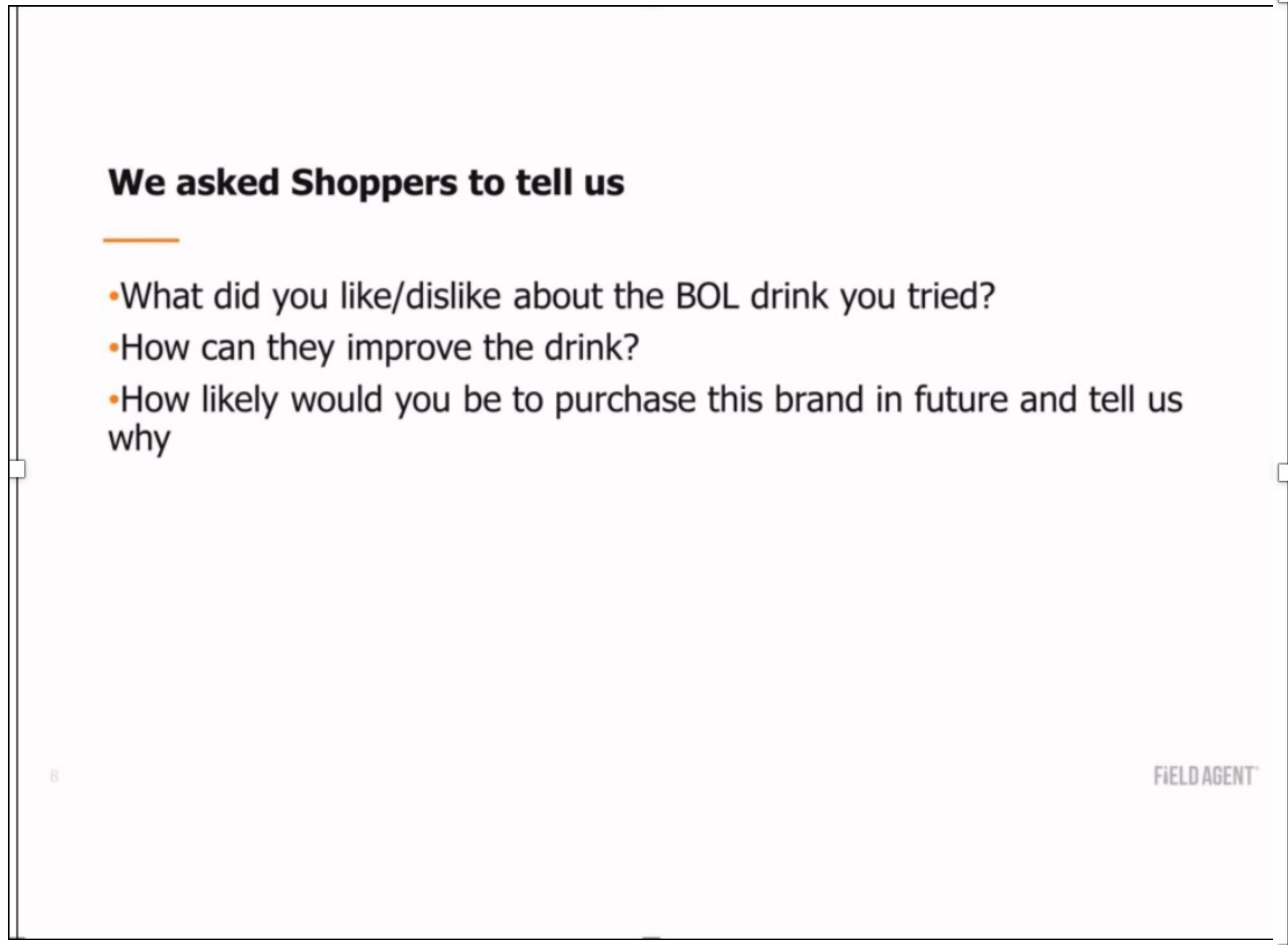
In store Video : What would you buy and why?

[Link to video](#)



Product feedback – Buy product take it home and try it

Link to in home video



We asked Shoppers to tell us

- What did you like/dislike about the BOL drink you tried?
- How can they improve the drink?
- How likely would you be to purchase this brand in future and tell us why

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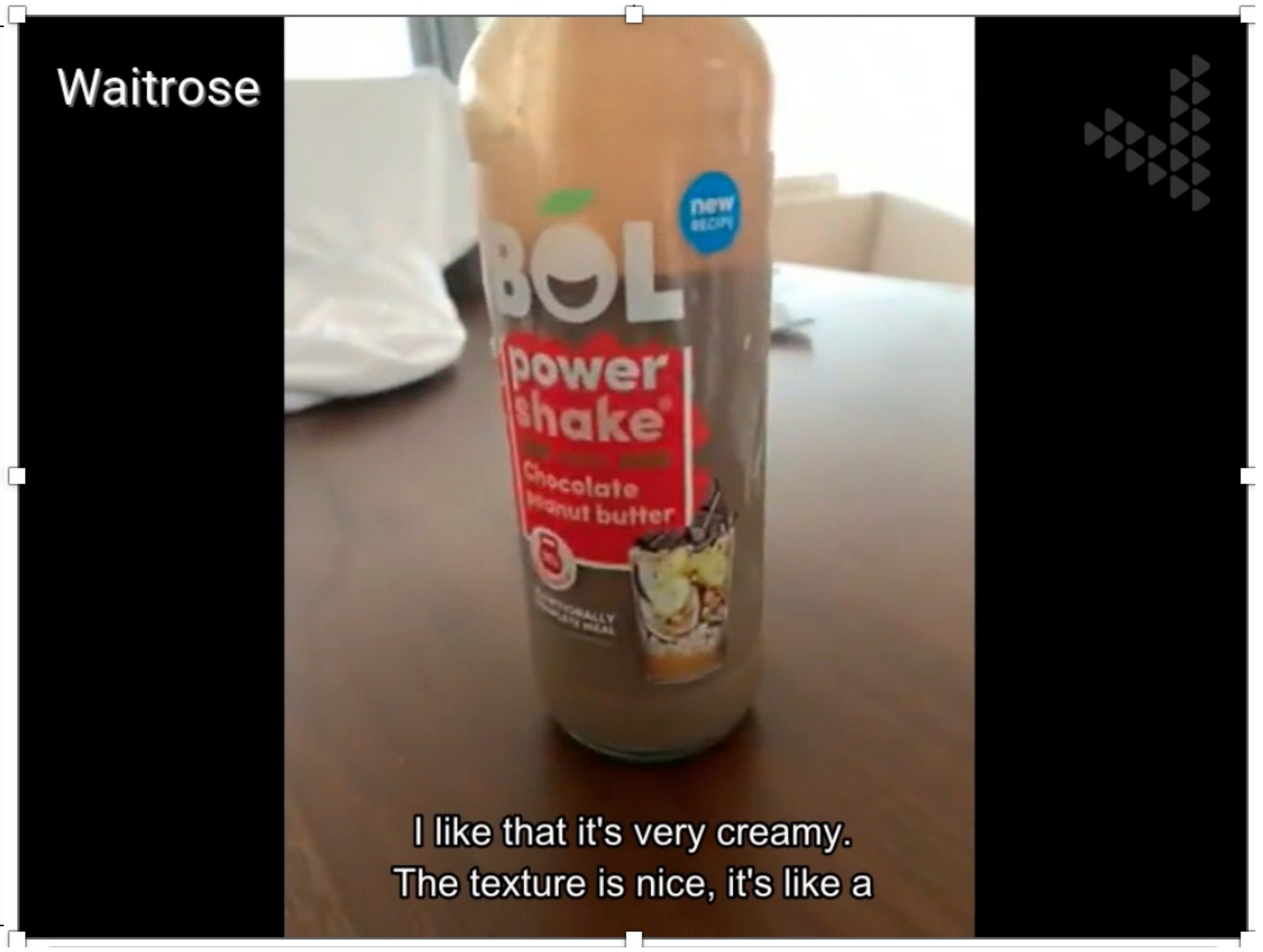

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In summary

Pre Store

- NCMD product category most appeals to healthy eaters who are active in sports
- Shoppers claimed choosing NCMD products driven by Taste, VFM and keeps me full

In store

- Majority look at ingredients before purchase to discover health benefits
- Product choice driven by Taste appeal, Packaging and product information
- Equally likely to buy HUEL or BOL (despite lower unprompted awareness)

BOL

- Top attributes Natural ingredients, protein content, vegan/dairy free
- **Likes :** Glass packaging, Flavours : **Dislikes**: Cost, lack of Flavour options
- **Trial :** majority felt product exceeded expectations and would purchase again – driven by taste
- **Even for a functional product Taste is the key driver : Pre store : Instore and after trial**

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How to evaluate key measures of success – Total Shopper Journey

Look at Pre store perceptions and establish key drivers

The impact of in-store placement and dominance at the fixture on likely purchase.

- Position on shelf and facings count is key to attract Shopper interest

Influence of pack design and core messages on purchase behaviour.

- Packaging plays an important role in generating impact, core product attributes and inspiring taste appeal

How effectively did the product meet and exceed shopper expectations.

- Evaluate through product purchase in store and capture feedback on video

Power of video in bringing the Shopper experience to life and presentation to retailers

This study would cost

- Pre store Survey with 30 questions N = 700
- 75 Shopper Visits with 30 Questions Photos and Video
- 50 Shopper Feed back on product trial

A
£10,000

20 Free Shopper visits
May 2023

STAND A
OUTSIDE ROOM 1

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What Makes Us Different

National Coverage + Real Shoppers + Retail Audits & Shopper Insight + Experienced Team

= Cost Effective & Fast Response

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Faster.
Cheaper.
Smarter.

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