



## KEY TAKEAWAYS

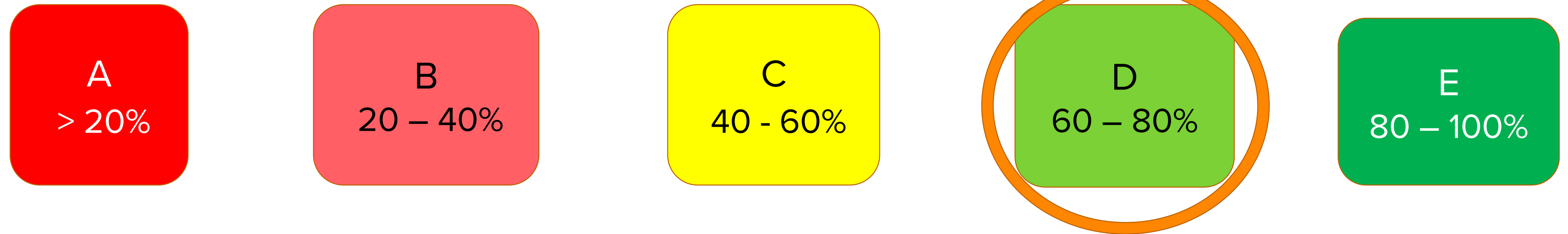
How to evaluate key measures of success – Total Shopper Journey

- ✓ 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



# How well do you understand Shopper behaviour In-store?



Not just WHAT they buy , but WHY?

# 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

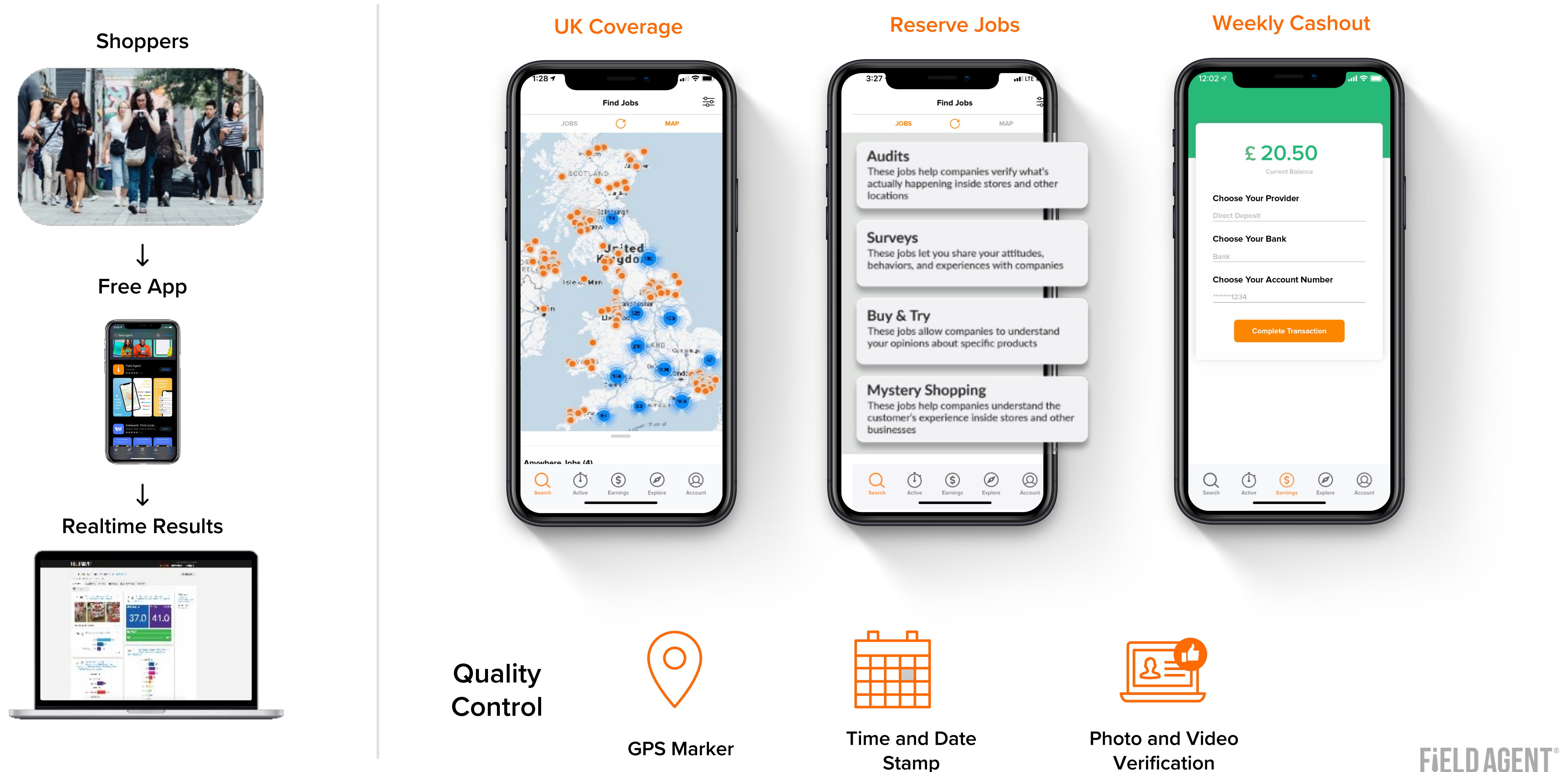
## Integrate Retail Audits & Real-time Shopper Insight

- 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



Our Shoppers can tell you..

## What's on Display

### Retail Audits



Promotions



Pricing



On-Shelf Availability



Display Compliance



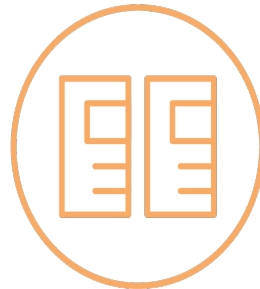
Planogram Compliance

## 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

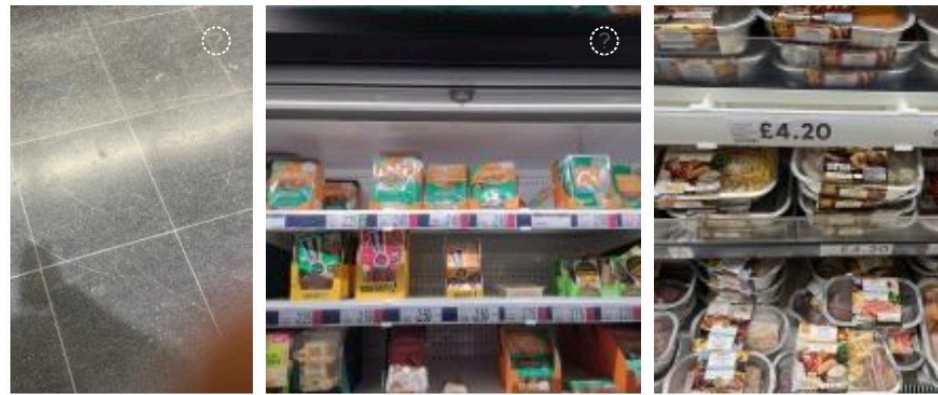


Ratings & Reviews



# Field Agent dashboards

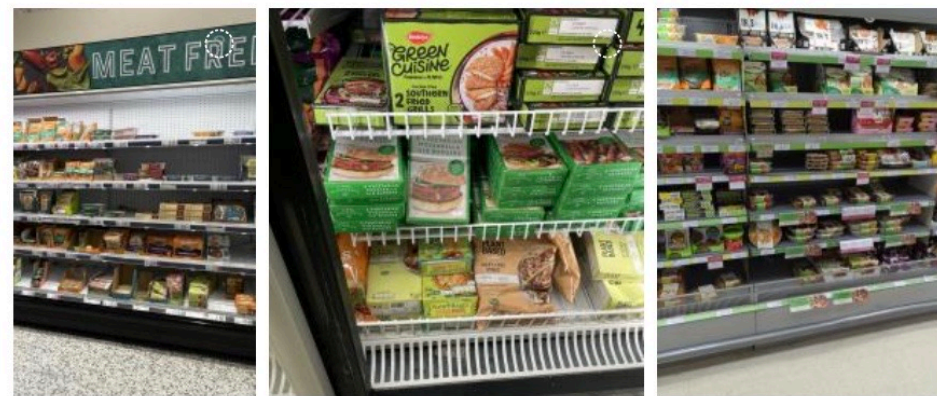
11 Take a photo of anything that stands out in the plant-based MEAT alternatives section. If nothing, take a picture of the floor.



Drag left or right to see more photos

[View All](#)

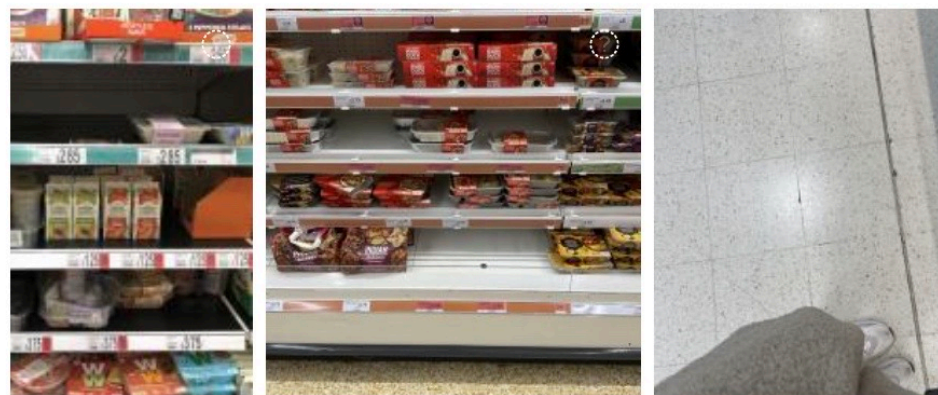
10 Please take a photograph of each section/bay selling plant-based MEAT alternatives.



Drag left or right to see more photos

[View All](#)

13 Please take a photograph of all the things you DISLIKE within plant-based MEAT alternatives display? If nothing, take a picture of the floor.



Drag left or right to see more photos

[View All](#)

12 Please take a photograph of all the things you LIKE within the plant-based MEAT alternatives display. If nothing, take a picture of the floor.



Drag left or right to see more photos

[View All](#)

ADD FILTER Location List : Tesco Extra Master store I...

View All Clear All Show Favorites Q4 Q10 Q11 Q12 Q13 Q18 Q23 Q28 Q29 Q32

Q36

18. Take a photo of the plant-based MEAT alternative product you would be most likely to buy.

Add To Folder Select All Photos Clear All |< <Prev 1 2 Next> >| 50

BATLEY EXTRA  
BRADFORD ROAD  
BATLEY, WEST YORKSHIRE  
Jan 21, 2023 03:15 pm  
Question Q18  
Agent: (64345)  
Response Group: 306473

COLCHESTER EXTRA  
HIGHWOODS SQUARE  
COLCHESTER, ESSEX  
Jan 20, 2023 11:15 am  
Question Q18  
Photo 1 of 2  
Agent: (146864)  
Response Group: 306347

COLCHESTER EXTRA  
HIGHWOODS SQUARE  
COLCHESTER, ESSEX  
Jan 20, 2023 11:15 am  
Question Q18  
Photo 2 of 2  
Agent: (146864)  
Response Group: 306347

COLNEY HATCH EXTRA  
COPPETT'S CENTRE  
NORTH FINCHLEY, LONDON  
Jan 21, 2023 04:49 pm  
Question Q18  
Photo 1 of 4  
Agent: (26253)  
Response Group: 306475

# 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:

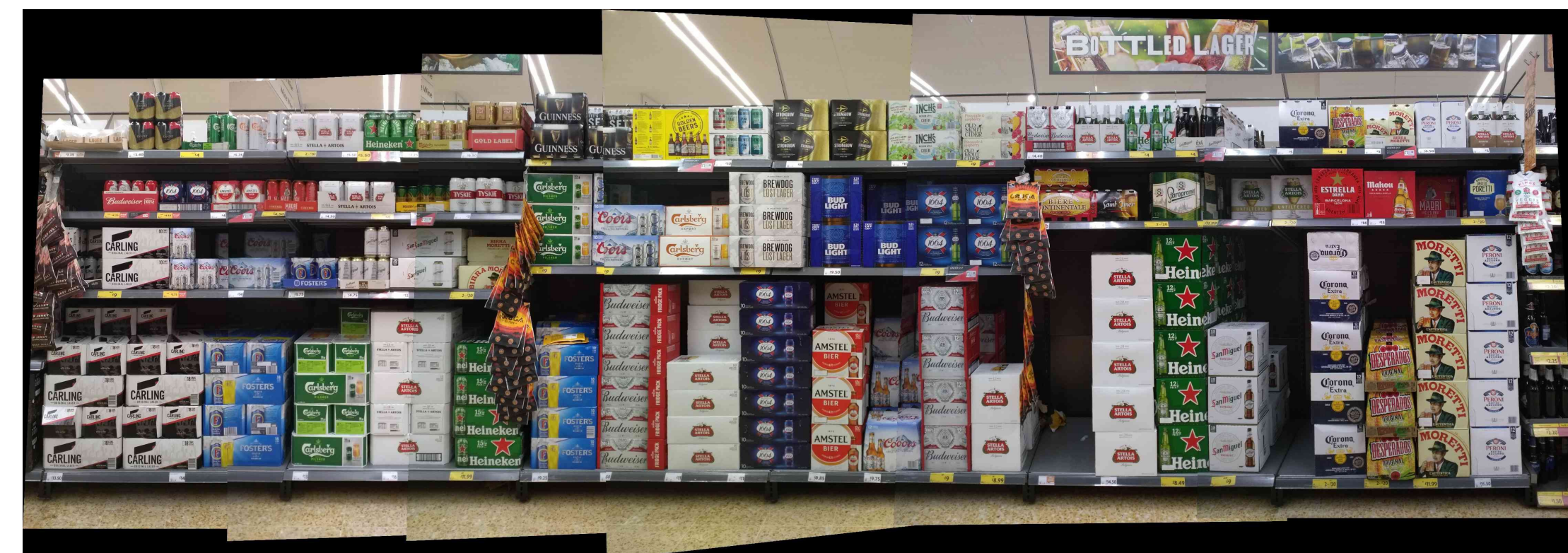
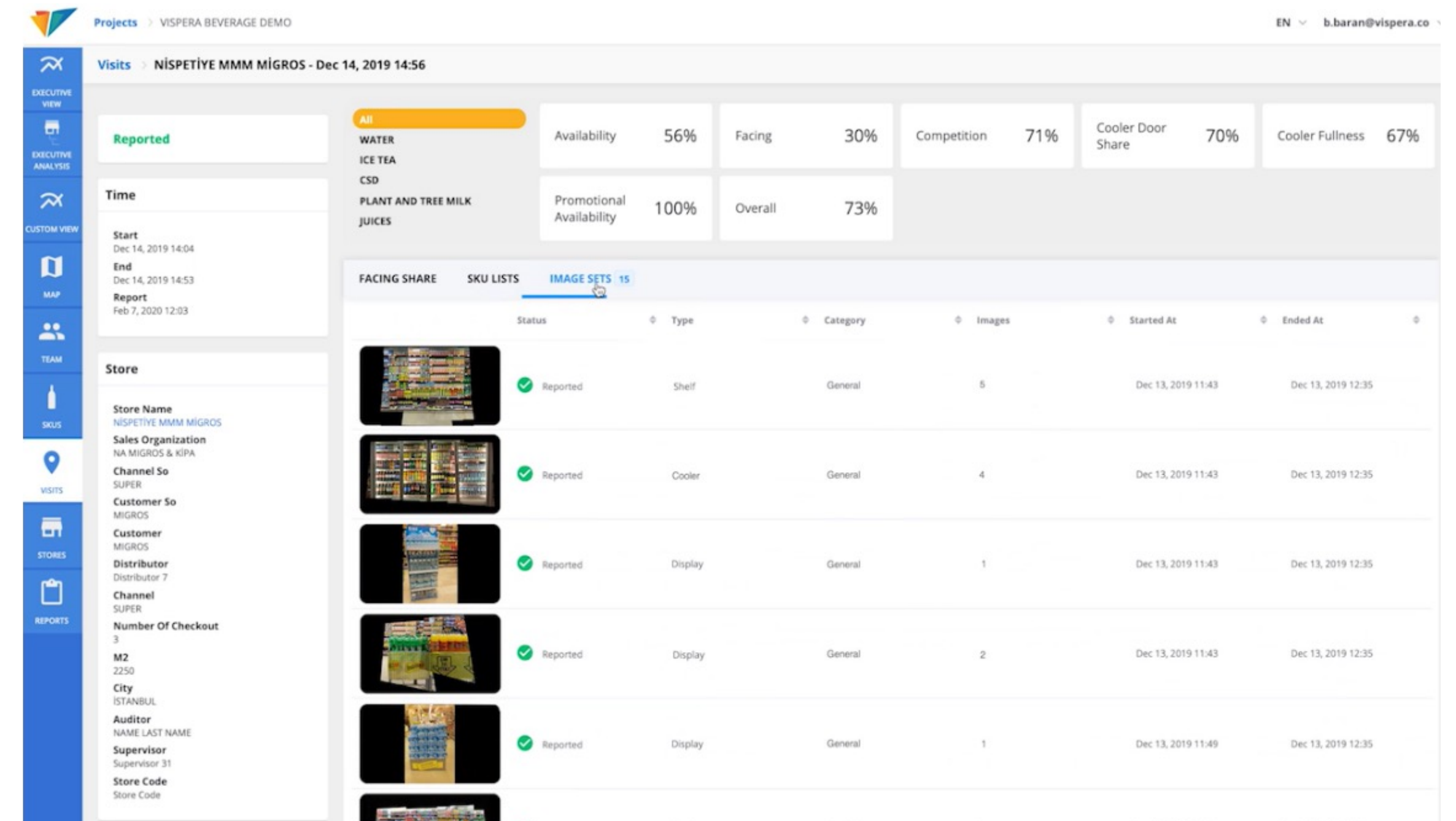
- Distribution
- Number of facings
- Share of shelf
- Available vs. Out-of-Stock
- Actual shelf price

**Compare on shelf metrics** across the full category including your competitors

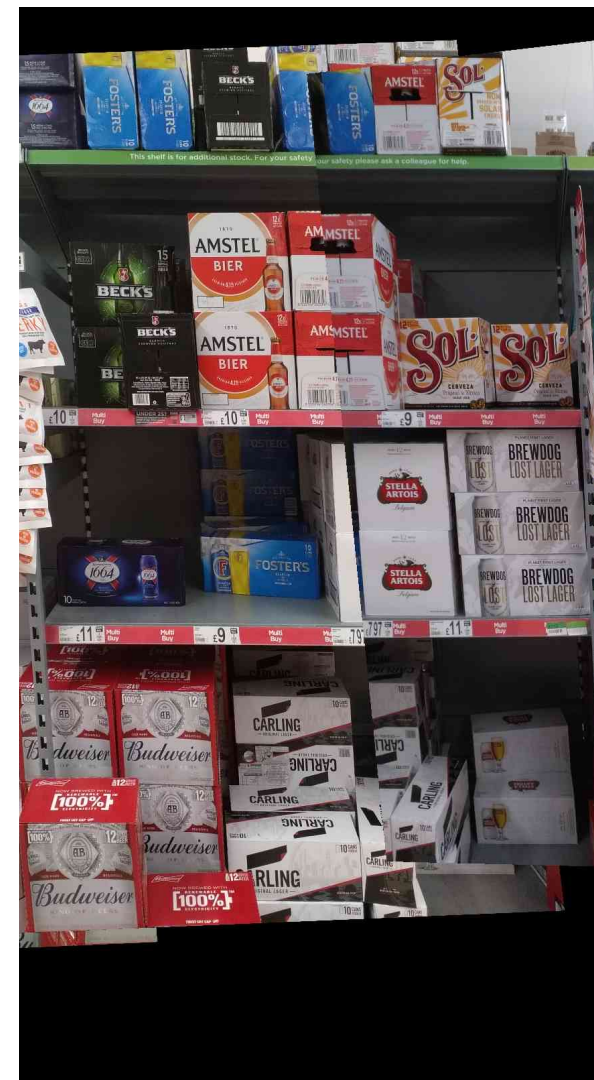
**95%+ data accuracy** at **SKU** Level

KPIs reported at all level:

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



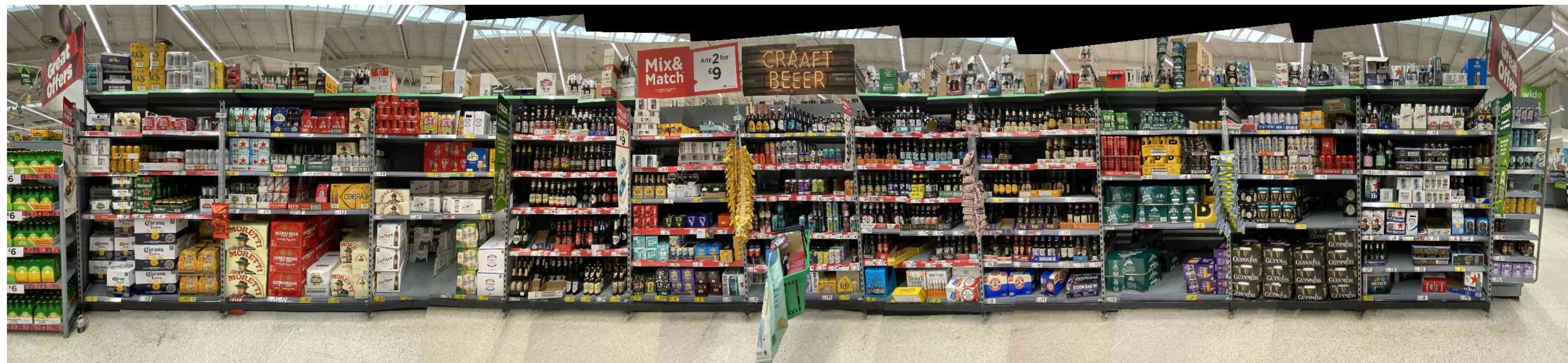
# Images Converted to Realograms



Multiple images are taken to cover the entire fixture

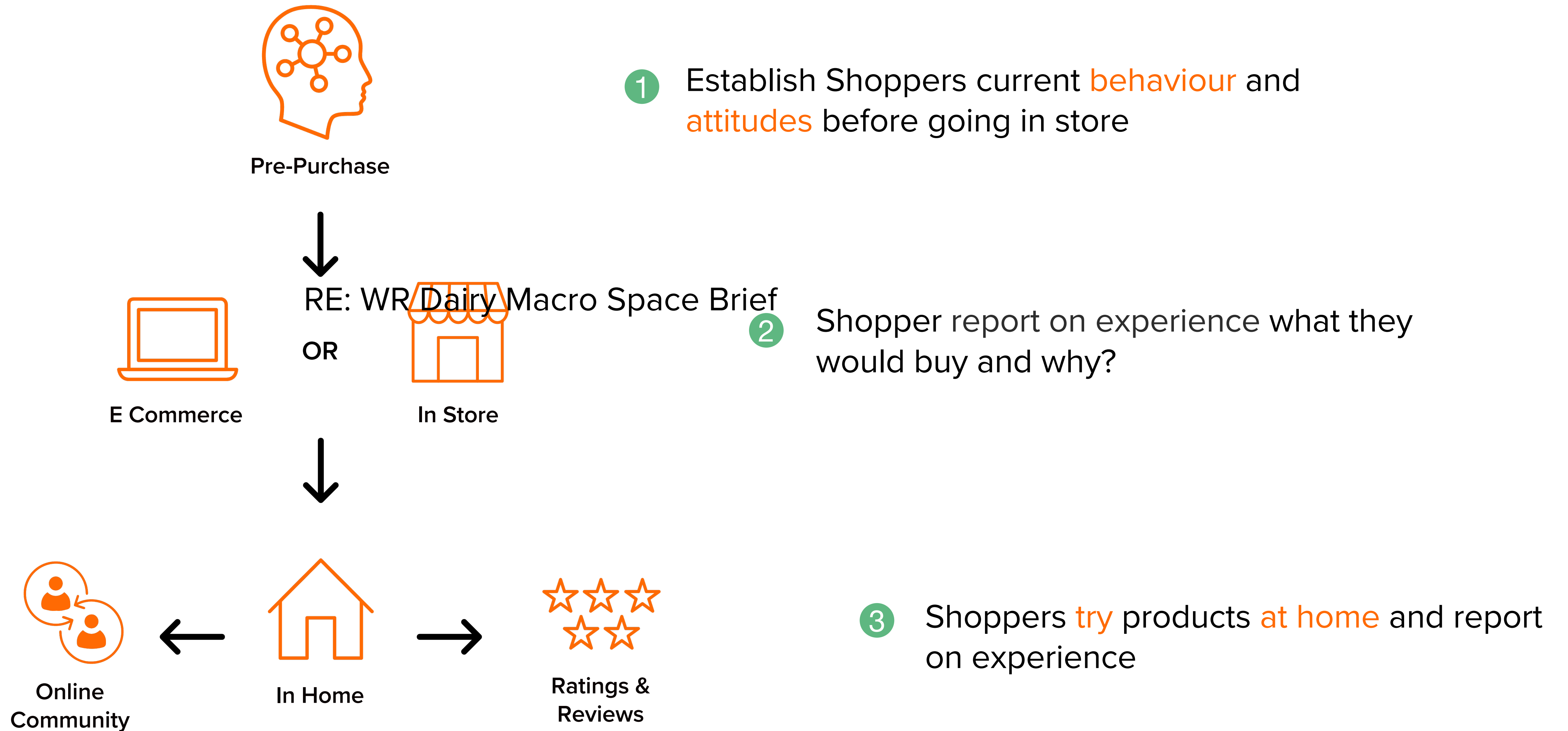
Images are stitched together

Realograms are created for each bay/unit





# Total Shopper Insight

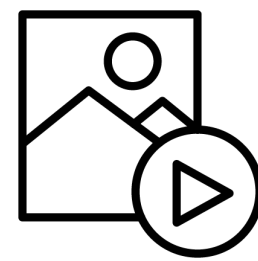


# What Shoppers Think and What They Do Instore?

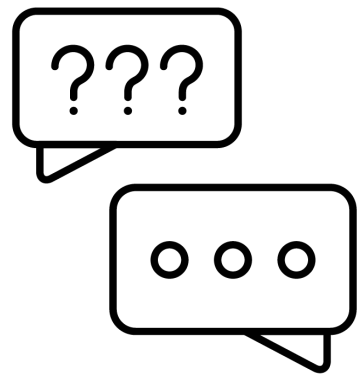
**Intention:** What would Shoppers **think** PRE store?



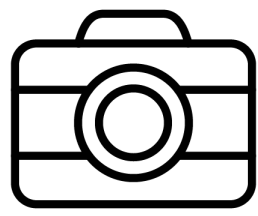
Pre-Store



Video

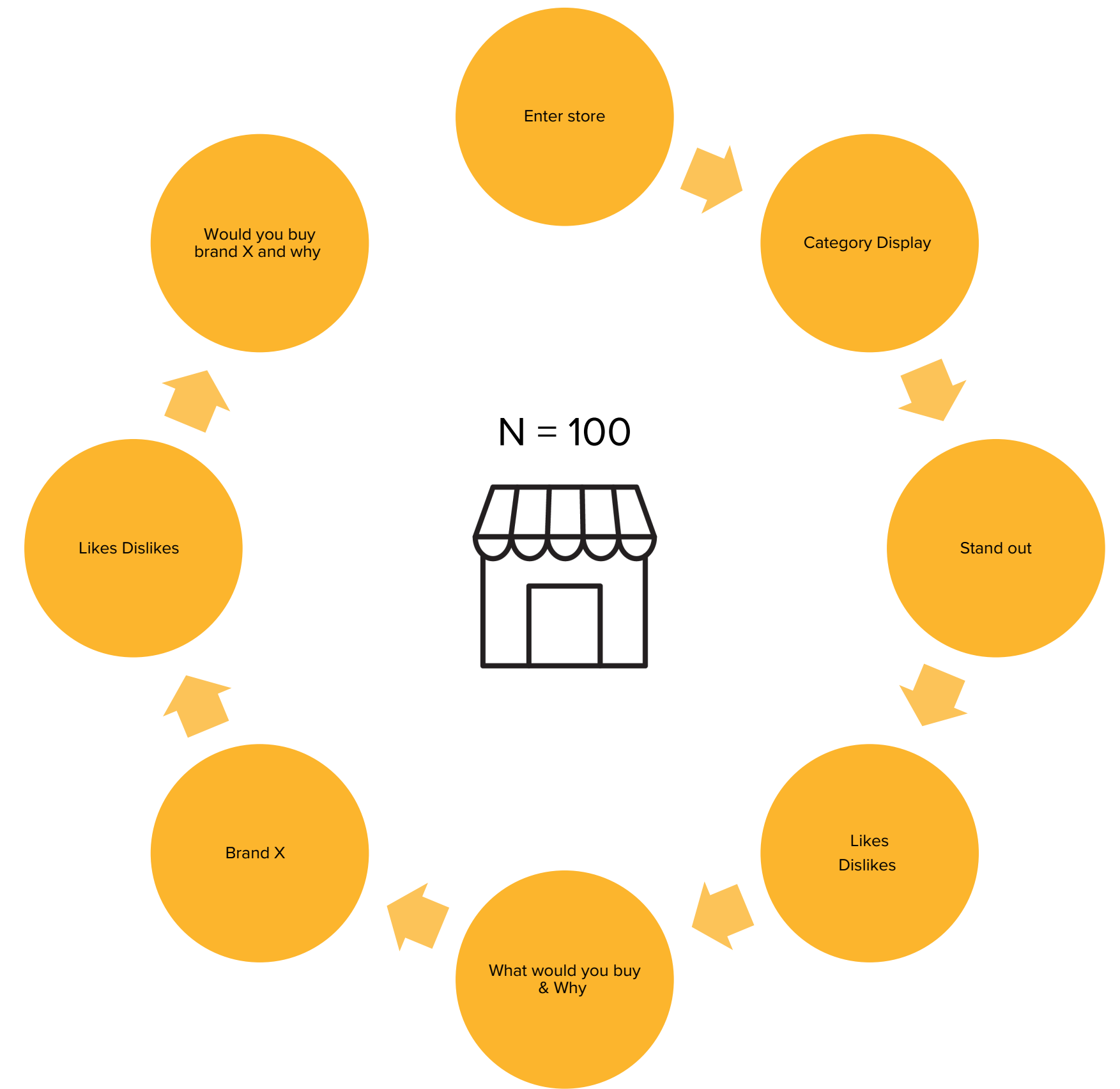


Q & A



Photo

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



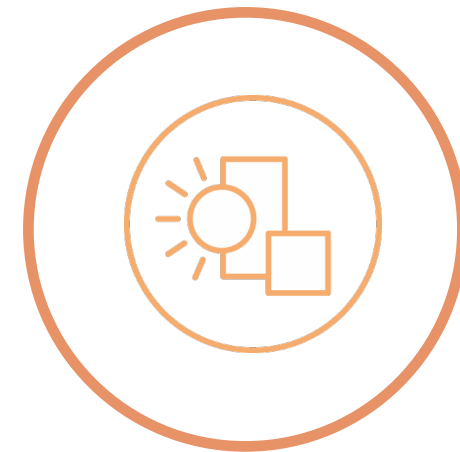
In Store

# In Store Insight

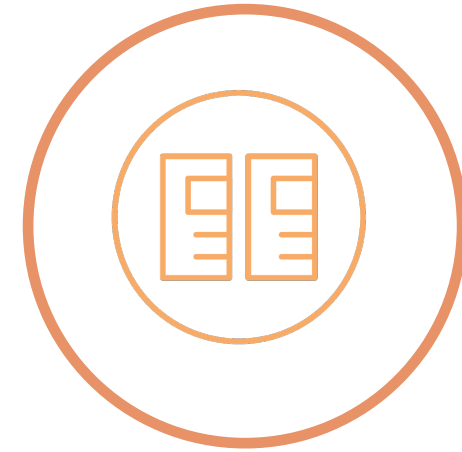
## What Shoppers would buy and why



Mystery Shop



Shelf impact



Product Choices



Buy and Why



Ideas to improve

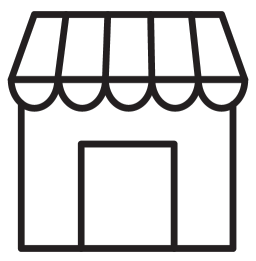


Showreel

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

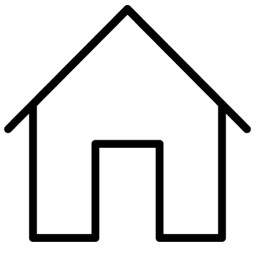


# Buy, Try, Ratings & Reviews



**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

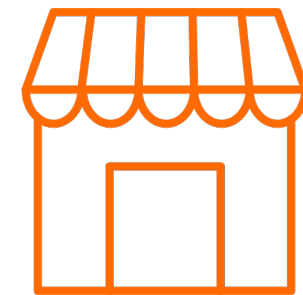


## Pre-Purchase

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

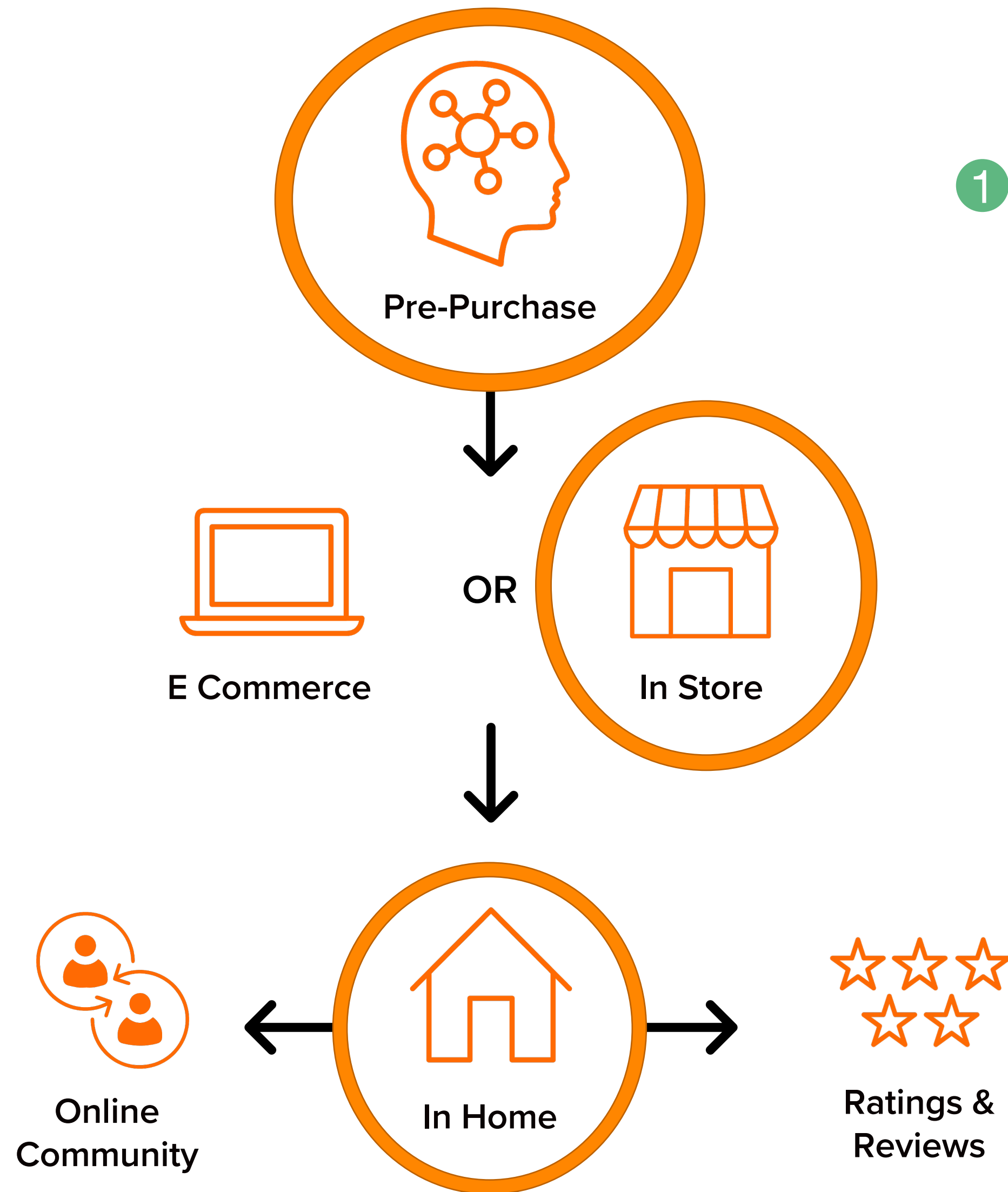
PPT presentation  
Analysis, cross tabs  
Coding and Quotes  
Charts with Photos  
Video transcription  
and Store edit



## 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



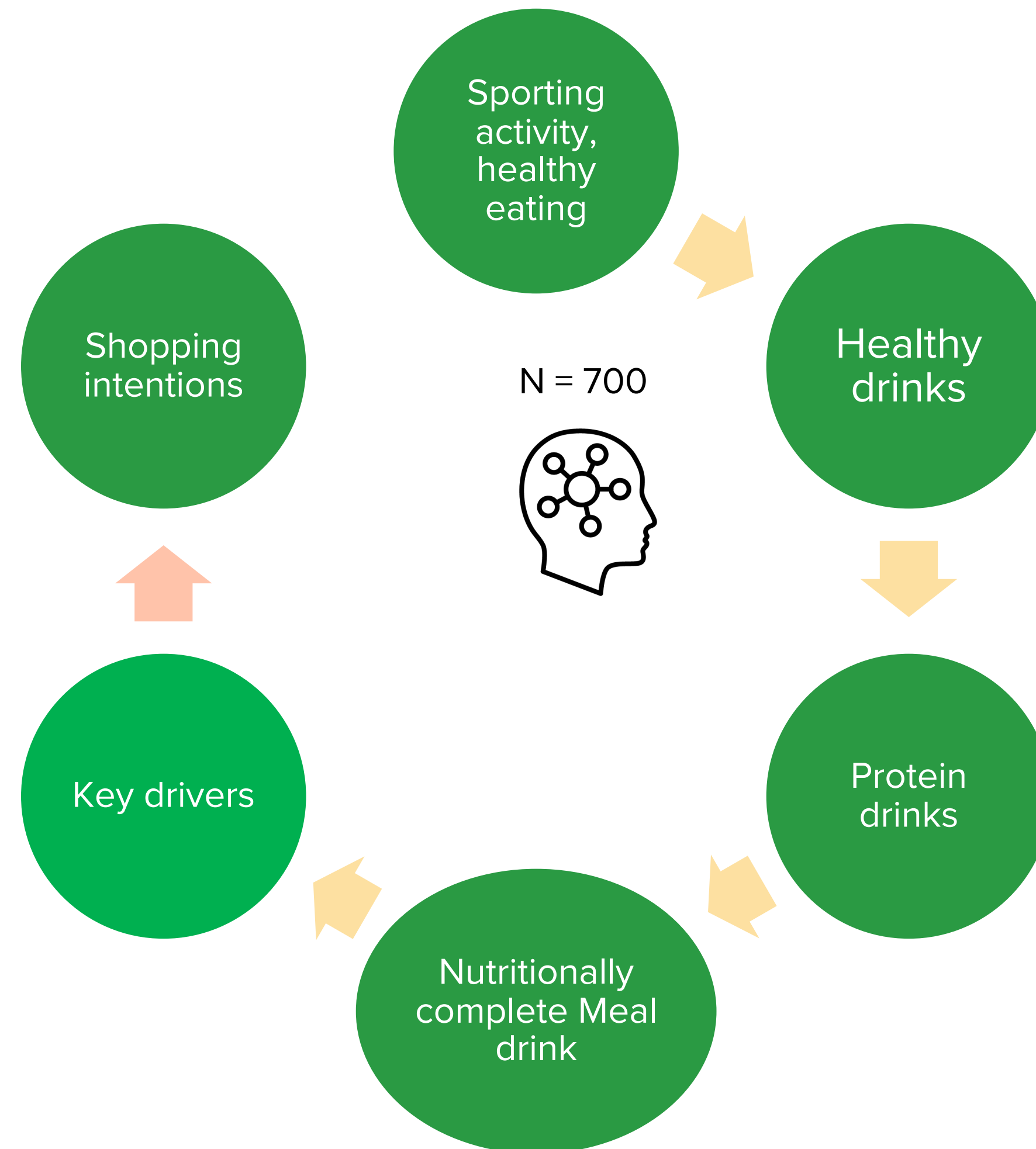
1 Establish Shoppers current **behaviour** and **attitudes** before going in store

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

3 Shoppers **try** products **at home** and report on experience

# What Shoppers Think before they go Instore?

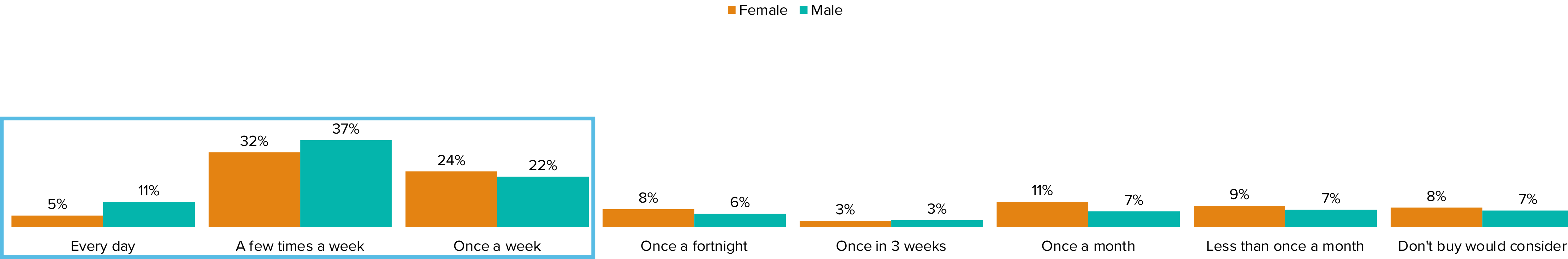
**Intention:** Think PRE store?





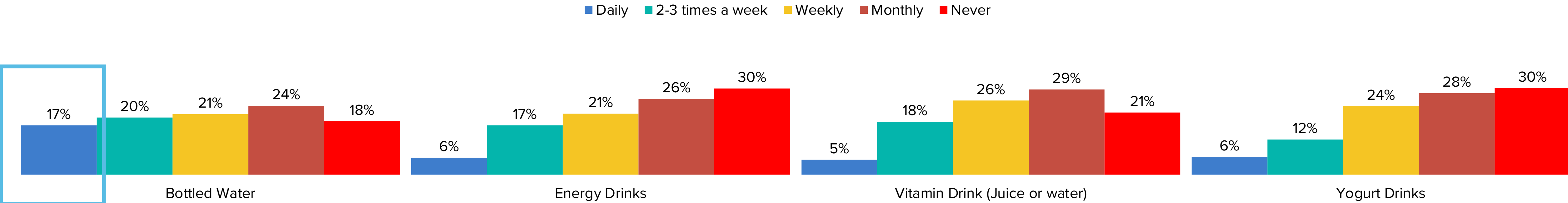
# More men (71%) buy a healthy drink at least weekly than women (61%)

Q4: How regularly do you buy healthy drinks?



## Bottled water most frequently bought daily.

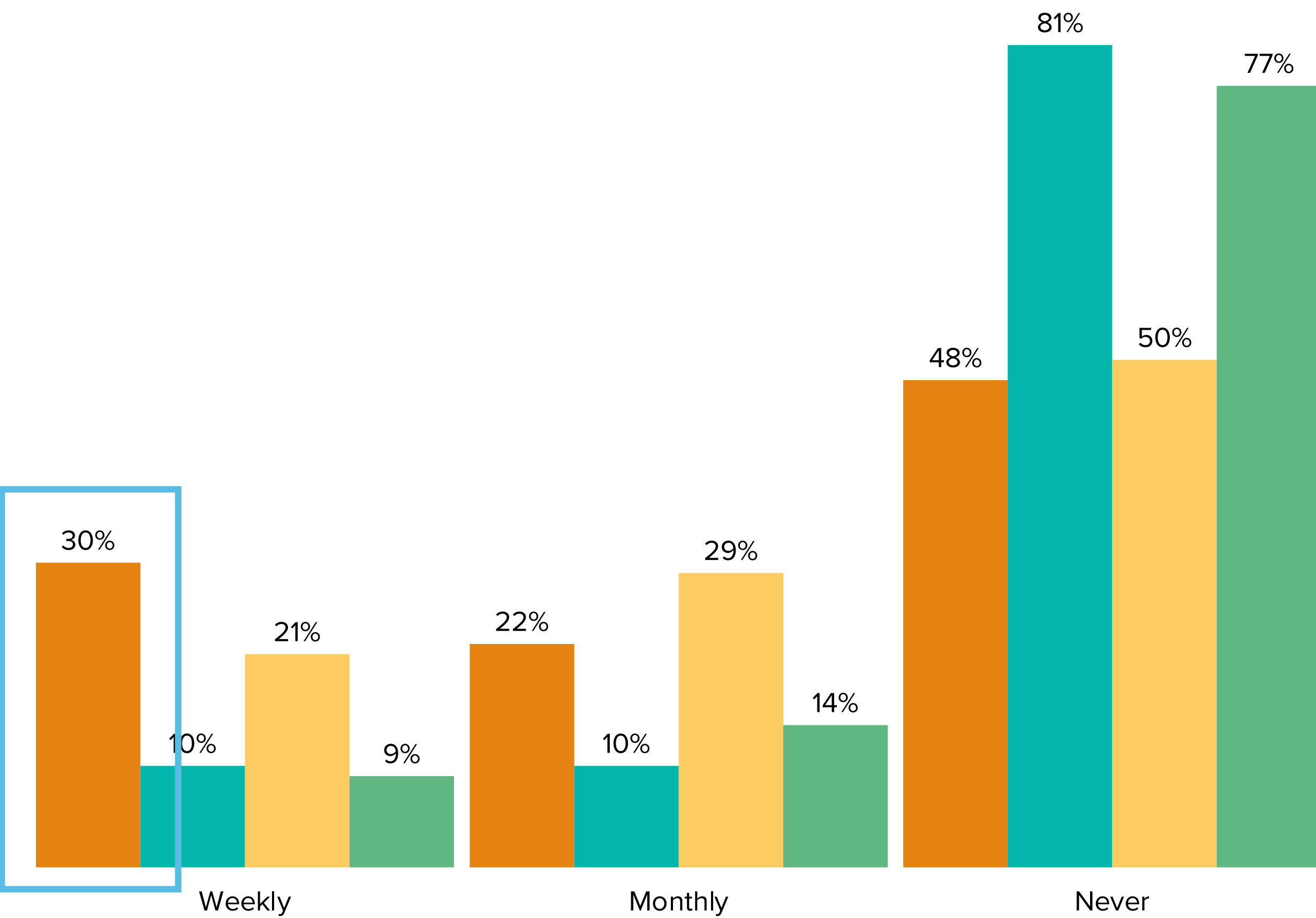
Q5: How regularly do you purchase each of the following?



# 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

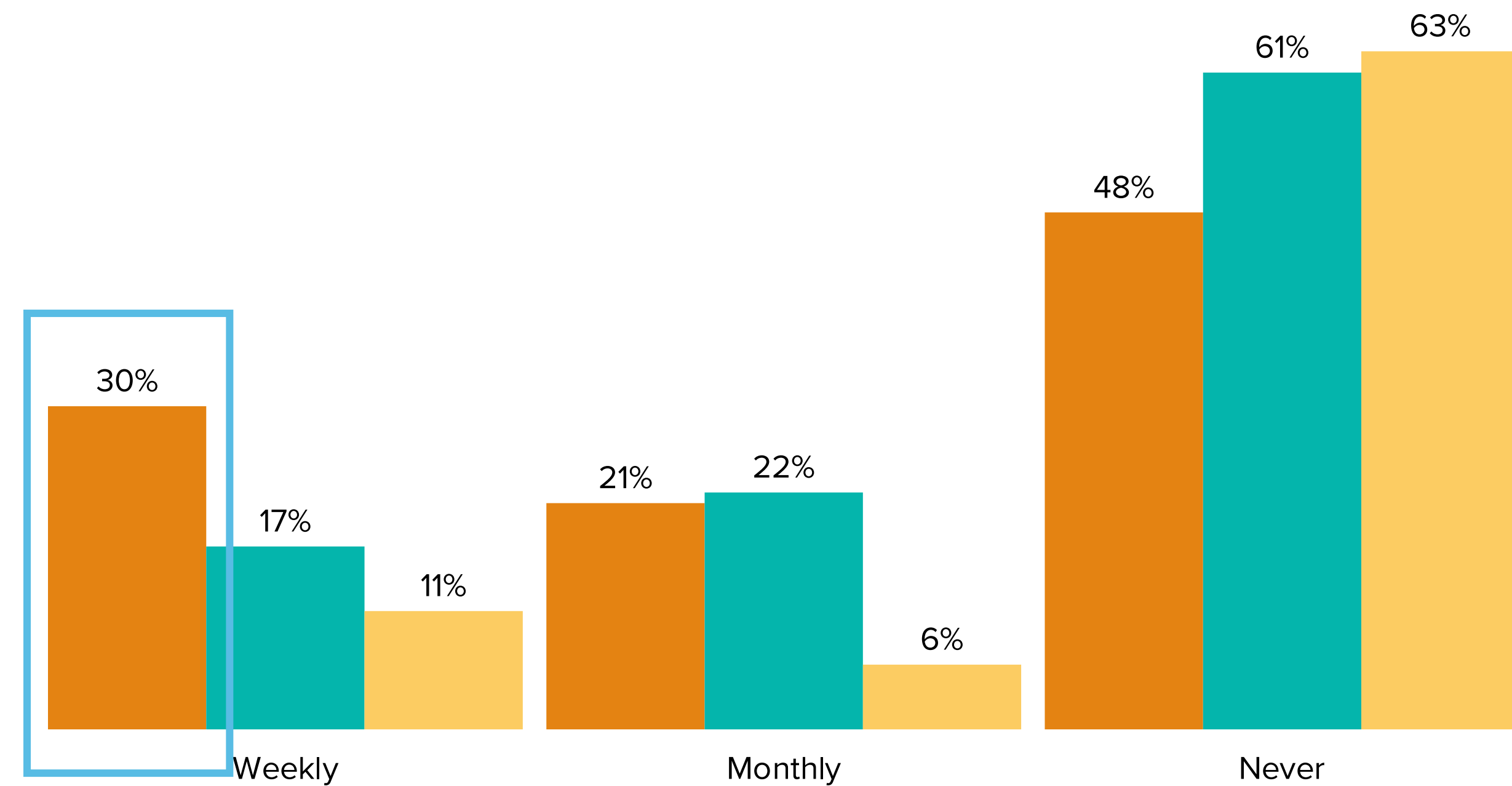
Weekly Once a fortnight Once in 3-4 weeks Less than once a month



18 n = 698

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

I always+mostly try to eat healthy foods  
I'll eat healthy food when I can, but it's not a problem if I don't  
I don't think about healthy eating most of the time



n = 698

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

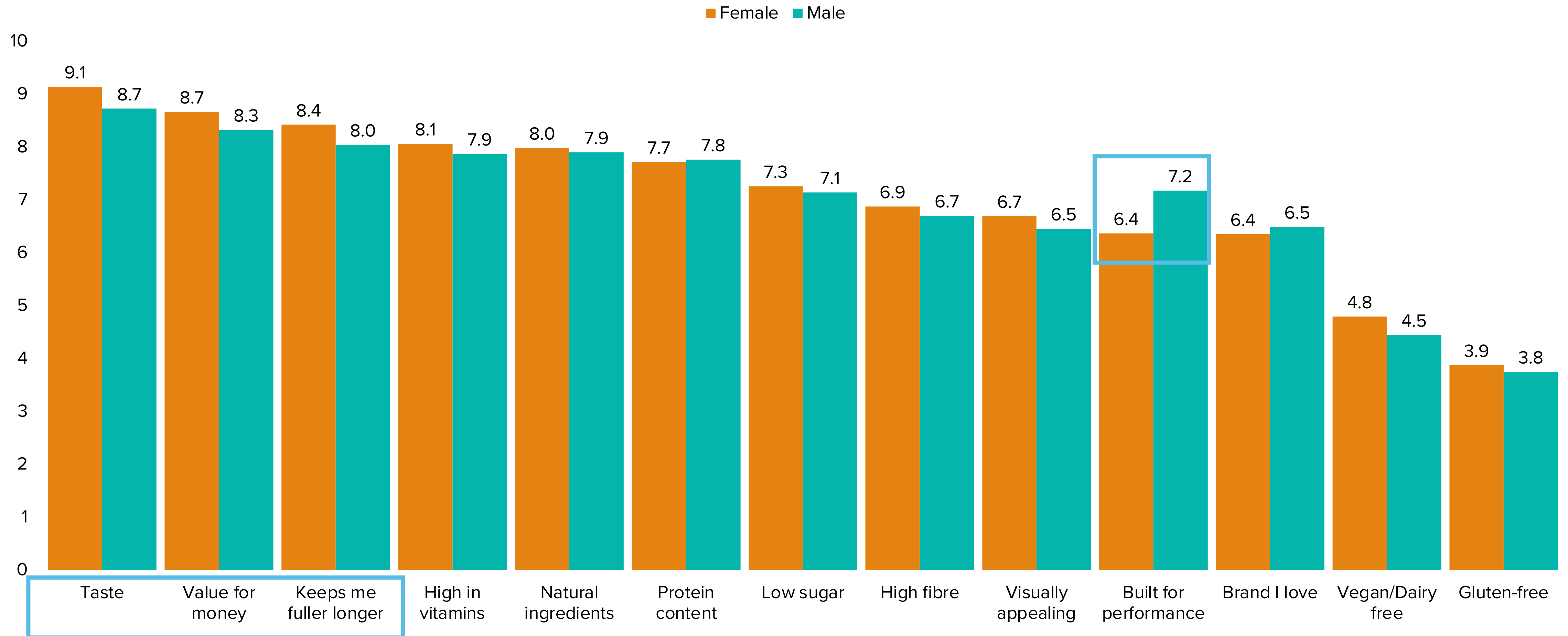
Q11: Why would you not consider buying Nutritionally Complete Meal drinks



But half of those who had not tried would consider

# 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"))



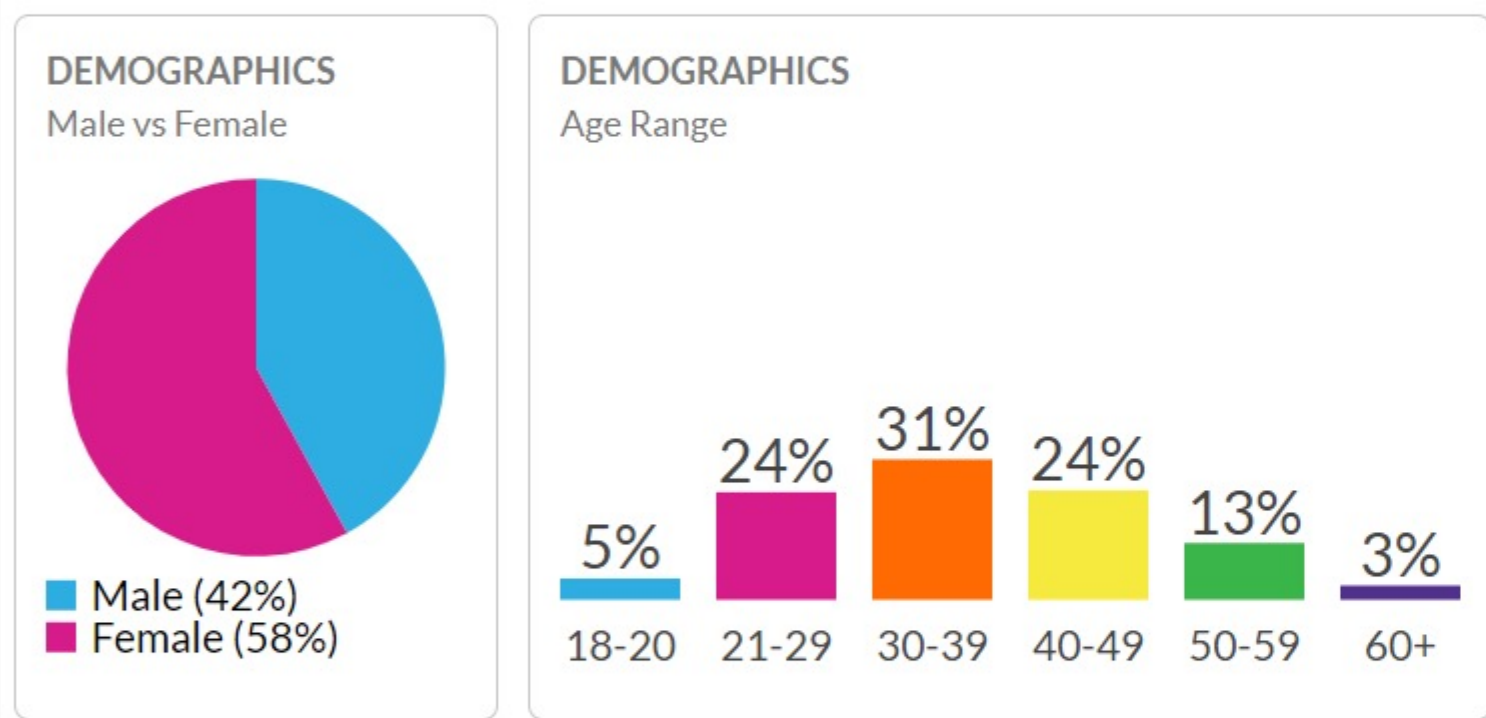
## Pre-Store headlines : Attitudes and perceptions of NCMD

Sample of Shoppers selected are generally active and health conscious:

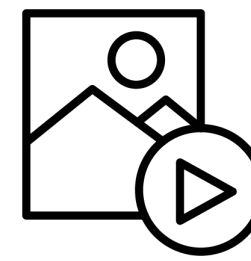
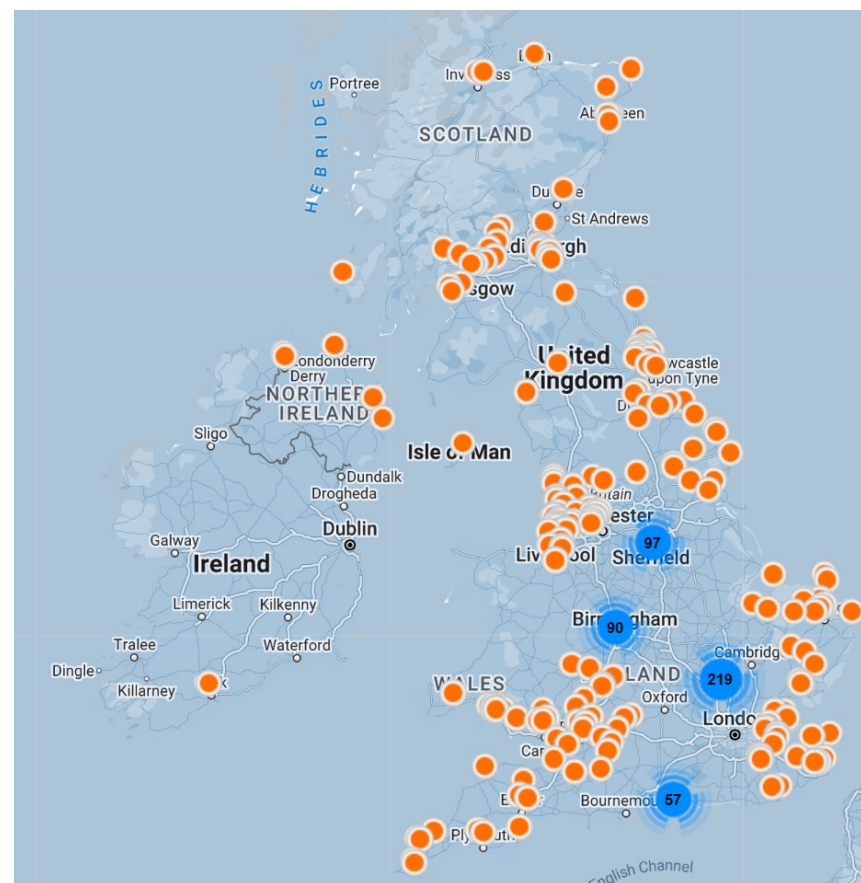
- Protein drinks been tried more than NCMD : both more popular among men, **half of those not tried would consider**
- More likely to be bought more frequently by those doing sport and with a focus on healthy eating
- Purchase drivers: Taste, Complete meal, Convenience
- Key barriers: Cost, Unhealthy,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

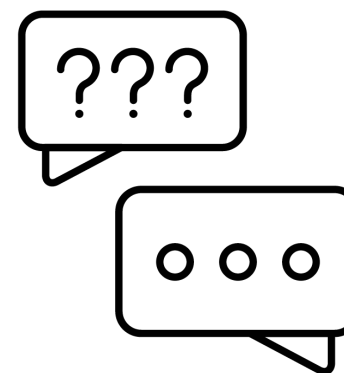
# Reality: What would Shoppers do Instore?



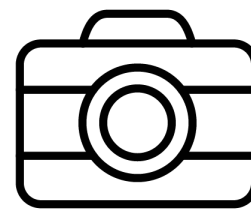
## Core Shoppers across the UK



Video



Q & A

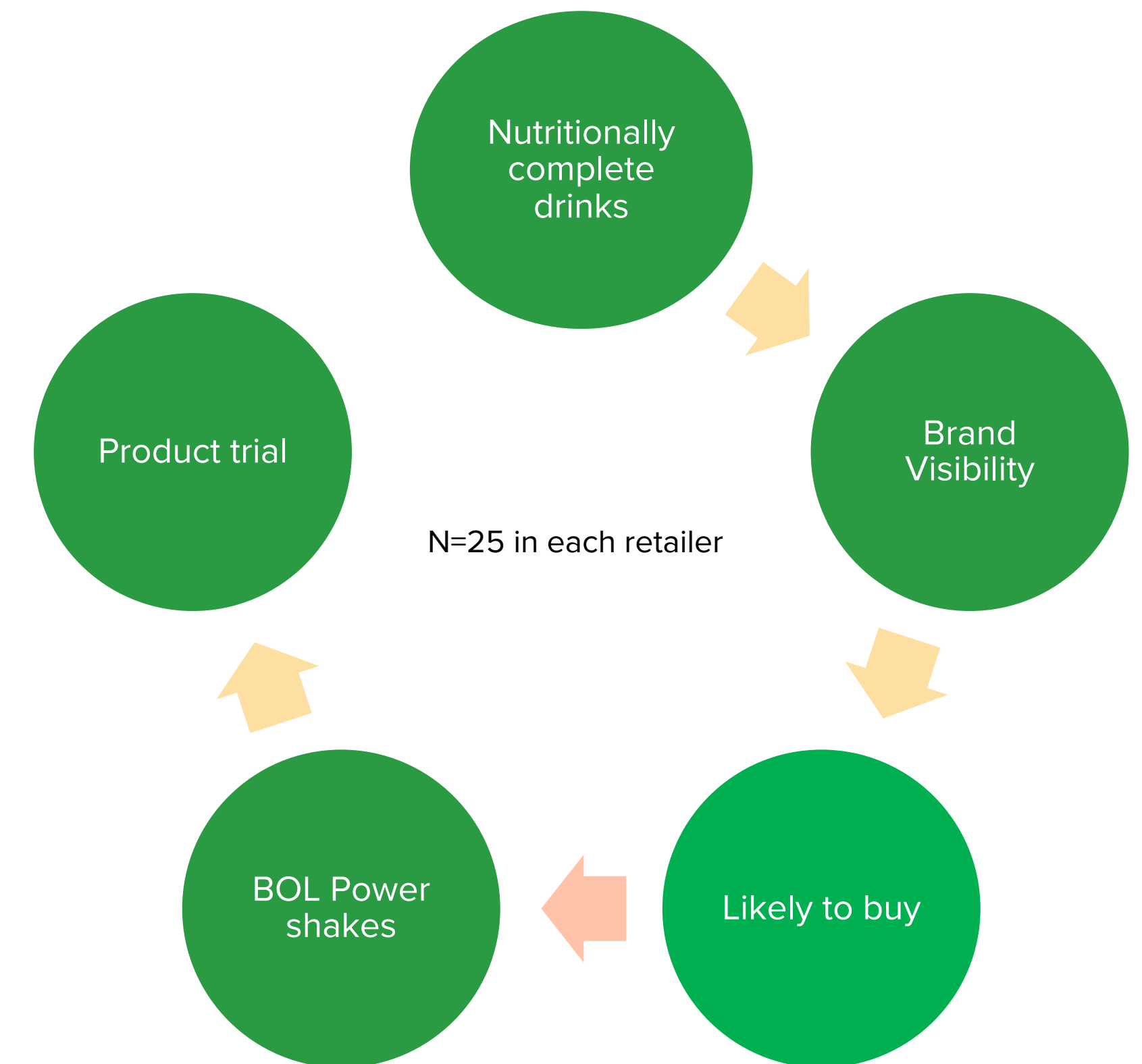


Photo

**TESCO**

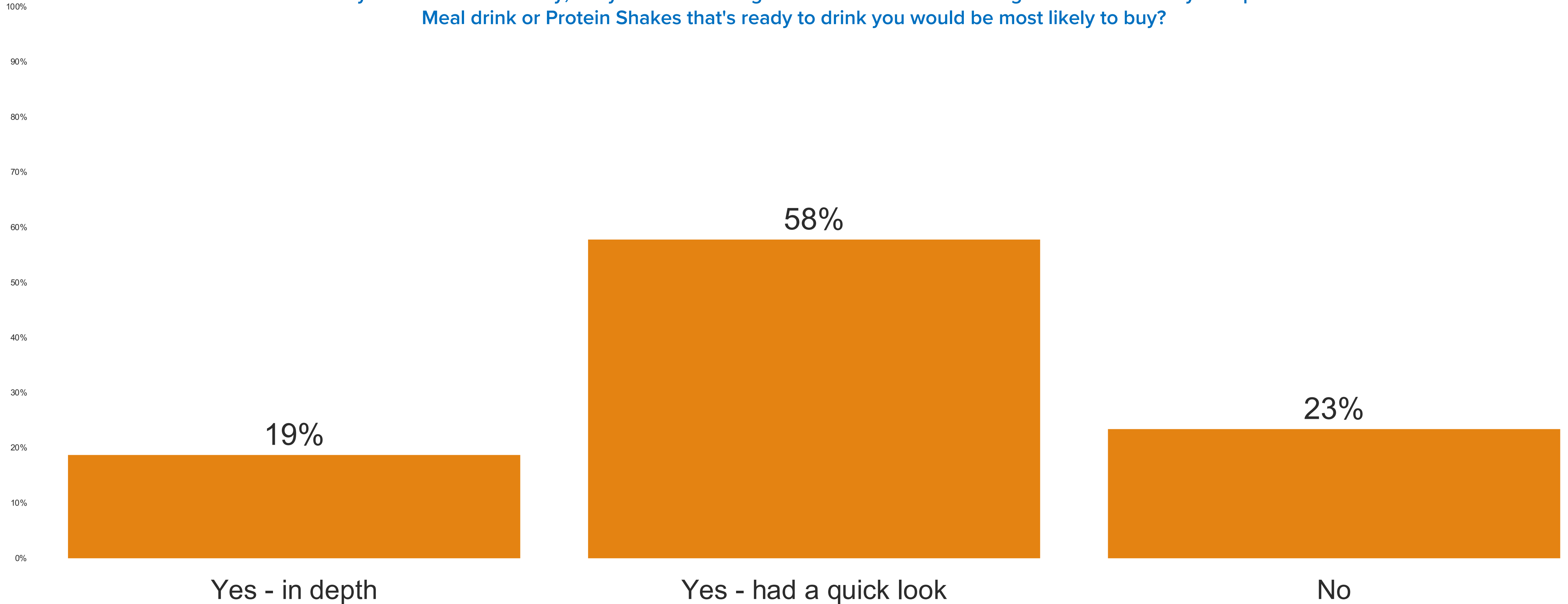
**Sainsbury's**

**Waitrose**



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

When you were instore today, did you read the "ingredients list" before deciding which Nutritionally Complete Meal drink or Protein Shakes that's ready to drink you would be most likely to buy?



# Product you would be most likely to buy – by store



<p>Sainsbury's 100 Regent Road SALFORD, Apr 04, 2023 02:45 pm Question Q8 Agent: (145167) Response Group: 312733</p>	<p>Sainsbury's 17-21 Camden Road LONDON, Apr 04, 2023 08:06 pm Question Q8 Agent: (317) Response Group: 312725</p>	<p>Sainsbury's Simone Well Avenue ASHFORD, Apr 02, 2023 03:25 pm Question Q8 Agent: (370) Response Group: 312752</p>	<p>Sainsbury's Oxney Road PETERBOROUGH, Apr 05, 2023 04:02 pm Question Q8 Agent: (115999) Response Group: 312802</p>
<p>Sainsbury's 99 Wilton Road LONDON, Apr 05, 2023 05:07 pm Question Q8 Agent: (129421) Response Group: 312975</p>	<p>Sainsbury's Charlton Riverside Place LONDON, Apr 06, 2023 01:50 pm Question Q8 Photo 1 of 3 Agent: (110458) Response Group: 312981</p>	<p>Sainsbury's Charlton Riverside Place LONDON, Apr 06, 2023 01:50 pm Question Q8 Photo 3 of 3 Agent: (110458) Response Group: 312981</p>	<p>Sainsbury's Charlton Riverside Place LONDON, Apr 06, 2023 01:50 pm Question Q8 Photo 2 of 3 Agent: (110458) Response Group: 312981</p>

<p>Waitrose Waitrose Ltd Nevill Road, Apr 03, 2023 12:41 pm Question Q8 Photo 1 of 3 Agent: (131706) Response Group: 312838</p>	<p>Waitrose Waitrose Ltd Nevill Road, Apr 03, 2023 12:41 pm Question Q8 Photo 2 of 3 Agent: (131706) Response Group: 312838</p>	<p>Waitrose Waitrose Ltd Nevill Road, Apr 03, 2023 12:41 pm Question Q8 Photo 3 of 3 Agent: (131706) Response Group: 312838</p>	<p>Waitrose Waitrose Ltd Nevill Road, Apr 03, 2023 03:07 pm Question Q8 Agent: (145147) Response Group: 312533</p>
<p>Waitrose Oxford Road Newbury, Apr 03, 2023 05:32 pm Question Q8 Agent: (150977) Response Group: 312825</p>	<p>Waitrose Church Street Wilmslow, Apr 03, 2023 05:06 pm Question Q8 Agent: (145041) Response Group: 312831</p>	<p>Waitrose Crown Park Rushden, Apr 03, 2023 12:47 pm Question Q8 Agent: (122230) Response Group: 312551</p>	<p>Waitrose Cherry Tree Walk Centre Barbican, Apr 03, 2023 06:50 pm Question Q8 Agent: (146893) Response Group: 312711</p>



# In store Video : What would you buy and why?

[Link to video](#)

We asked Shoppers to tell us

Which Nutritionally Complete Meal drink would you be most likely to buy and why?

Sainsbury's



I'm in Sainsbury's food-to-go section, and as I walk in, I can see

# 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

FIELD AGENT

Waitrose



I like that it's very creamy.  
The texture is nice, it's like a

# 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**

# 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**



Robin Shuker

[robin@fieldagent.co.uk](mailto:robin@fieldagent.co.uk)



Gwen Deloux

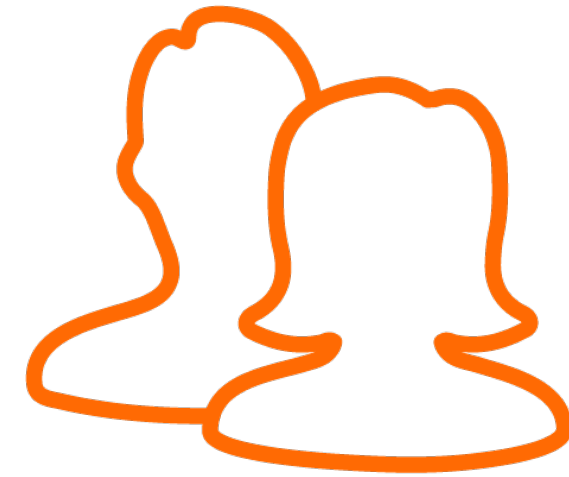
[gwen@fieldagent.co.uk](mailto:gwen@fieldagent.co.uk)

# What Makes Us Different



National Coverage

+



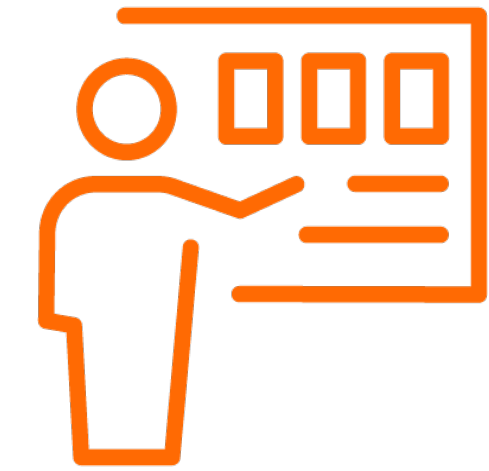
Real Shoppers

+



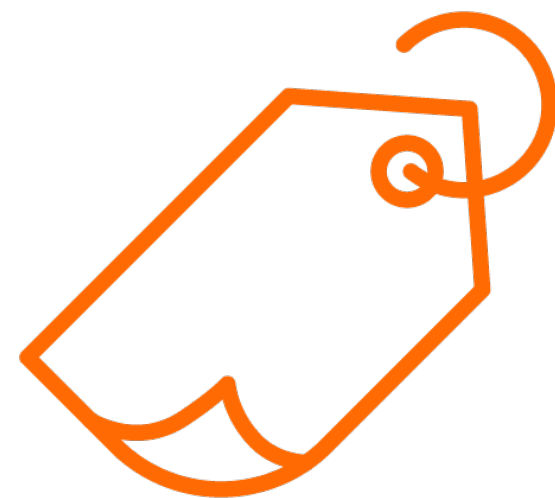
Retail Audits & Shopper Insight

+



Experienced Team

=



Cost Effective

&



Fast Response

**FIELD<sup>®</sup>**  
**AGENT**

**Faster.**  
**Cheaper.**  
**Smarter.**

Robin Shuker 07803 610684

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