



prodege

buzzback

Designing Research for a Mobile First World



What we'll cover



Who We are and



Why We are here



Case Study



Key Learnings &
Looking Ahead

What we do

Two decades of pioneering innovation

Grasp your innovation journey

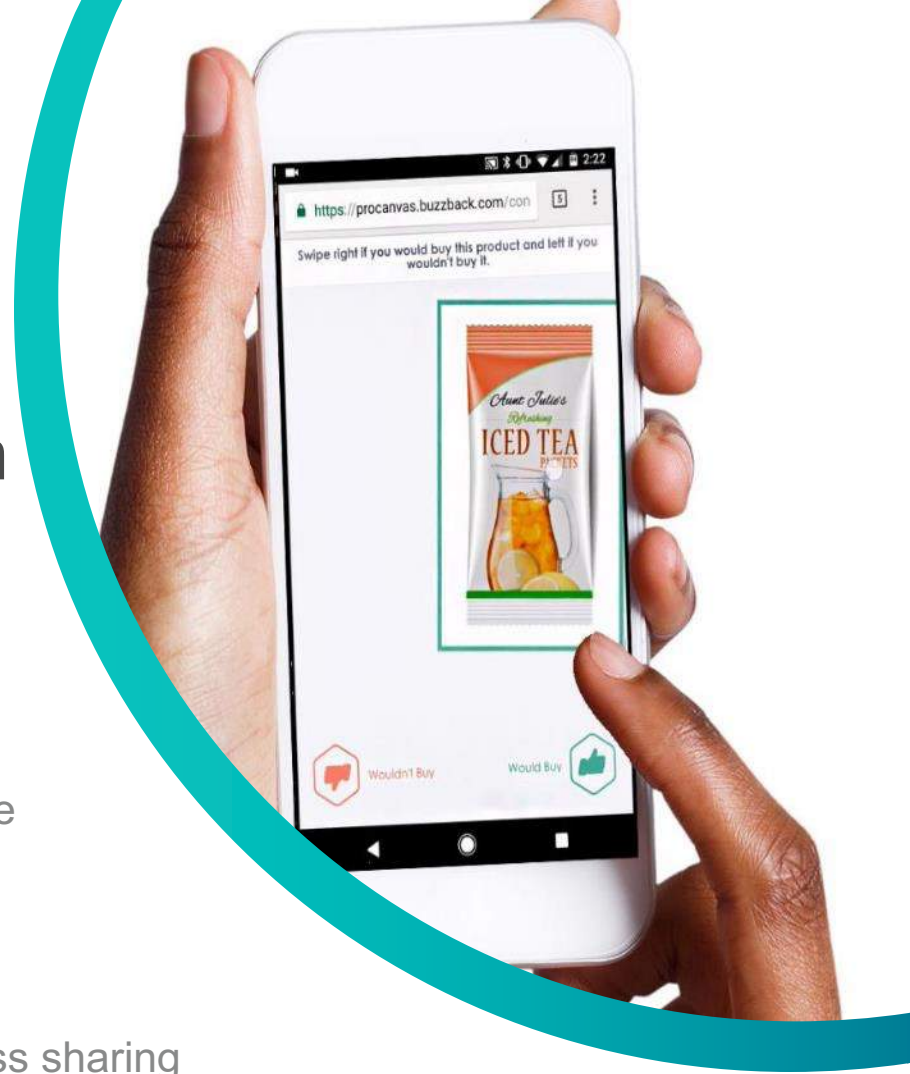
Consumer centric – empathetic to how people live not just buy

Interactive & in the moment – game-like techniques to drive engagement

Relentlessly focused on why – with subconscious, emotional understanding

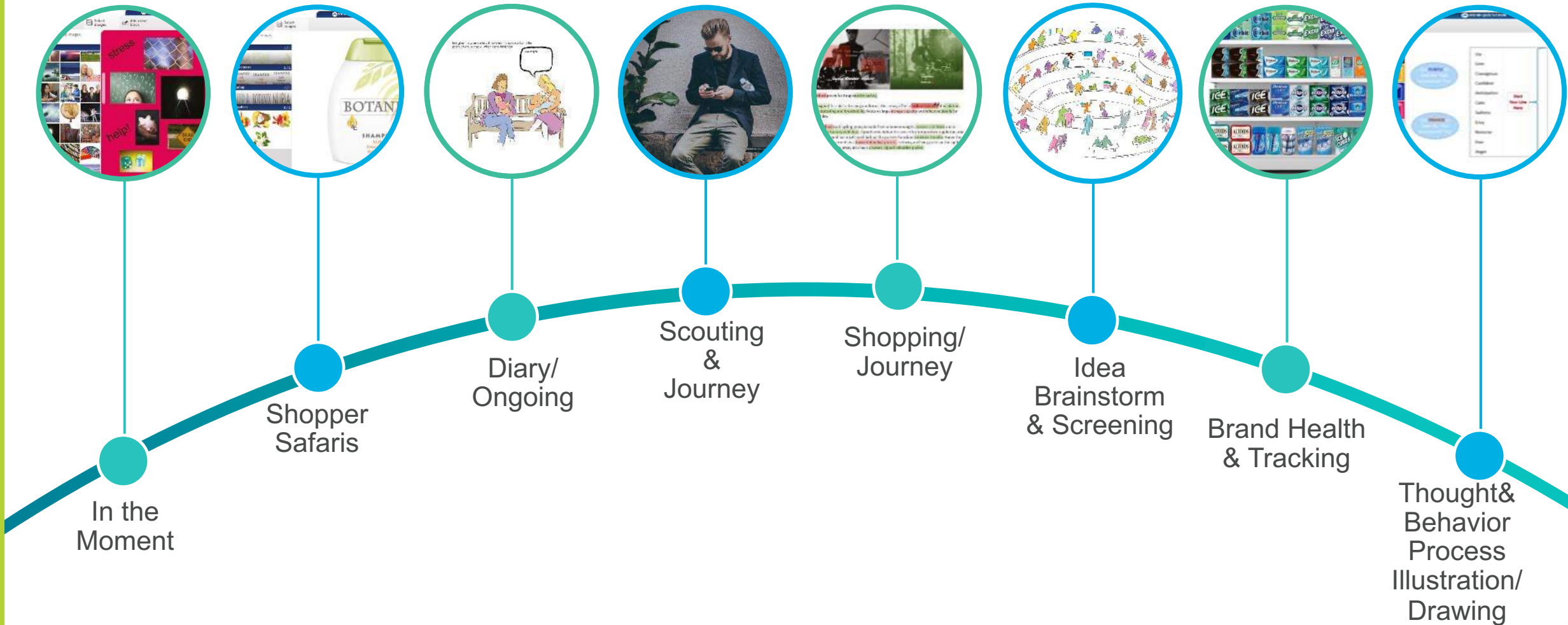
Visual & ready to activate – for seamless sharing

Agile & reliable – Spot on. Every time.

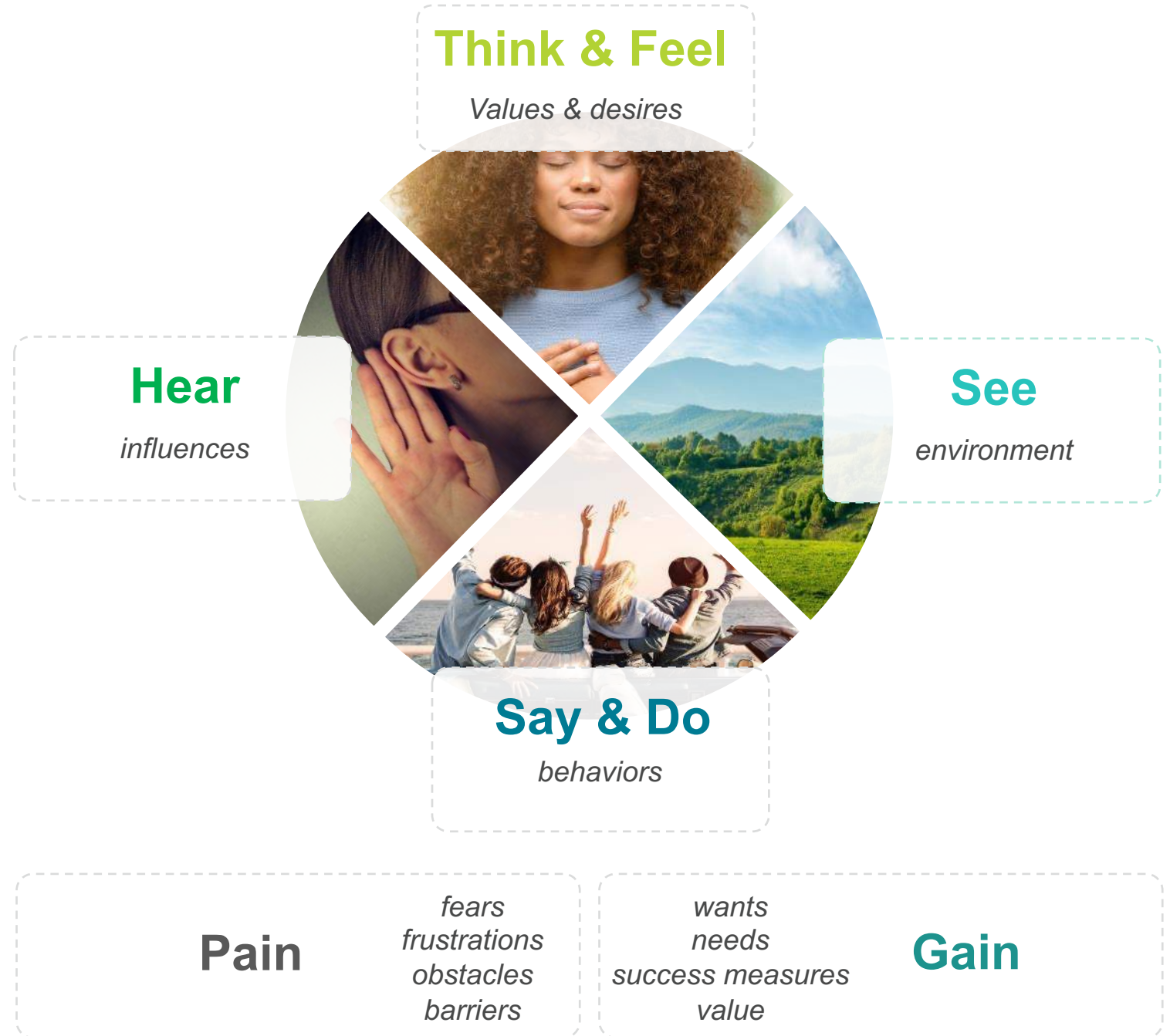


Integrating our techniques to mobile experiences

Solving your problems with unique approaches



Everything we do is grounded in Consumer Centricity



About Prodege

2005

Prodege, LLC
Founded

450+

Employees
Worldwide

50M

Survey Completes
Delivered in 2020

120M+

Respondents
Globally

Global Footprint with Employees in Following Cities:

- Los Angeles (HQ)
- San Francisco
- Chicago
- Denver
- Dallas
- Minneapolis
- New York
- Toronto
- London
- Berlin
- New Delhi

Awards & Affiliations



Our Story:



- **Family-owned** since 1958
- **#3** lunchmeat brand in the U.S.
- **#2** bacon brand in the U.S. Natural Channel
- **1,500+** employees across 5 locations
- **Proud supporters** of local causes



Our Core Brands:



The go-to staple for parents who want healthy and affordable meal solutions



Taste that goes above and beyond for those who seek high-quality flavorful food experiences



More choices to better serve families on a restricted budget



A higher standard of natural for consumers who don't cut corners



The premium quality choice of hot dogs and sausages for those who enjoy authentic, local flavor

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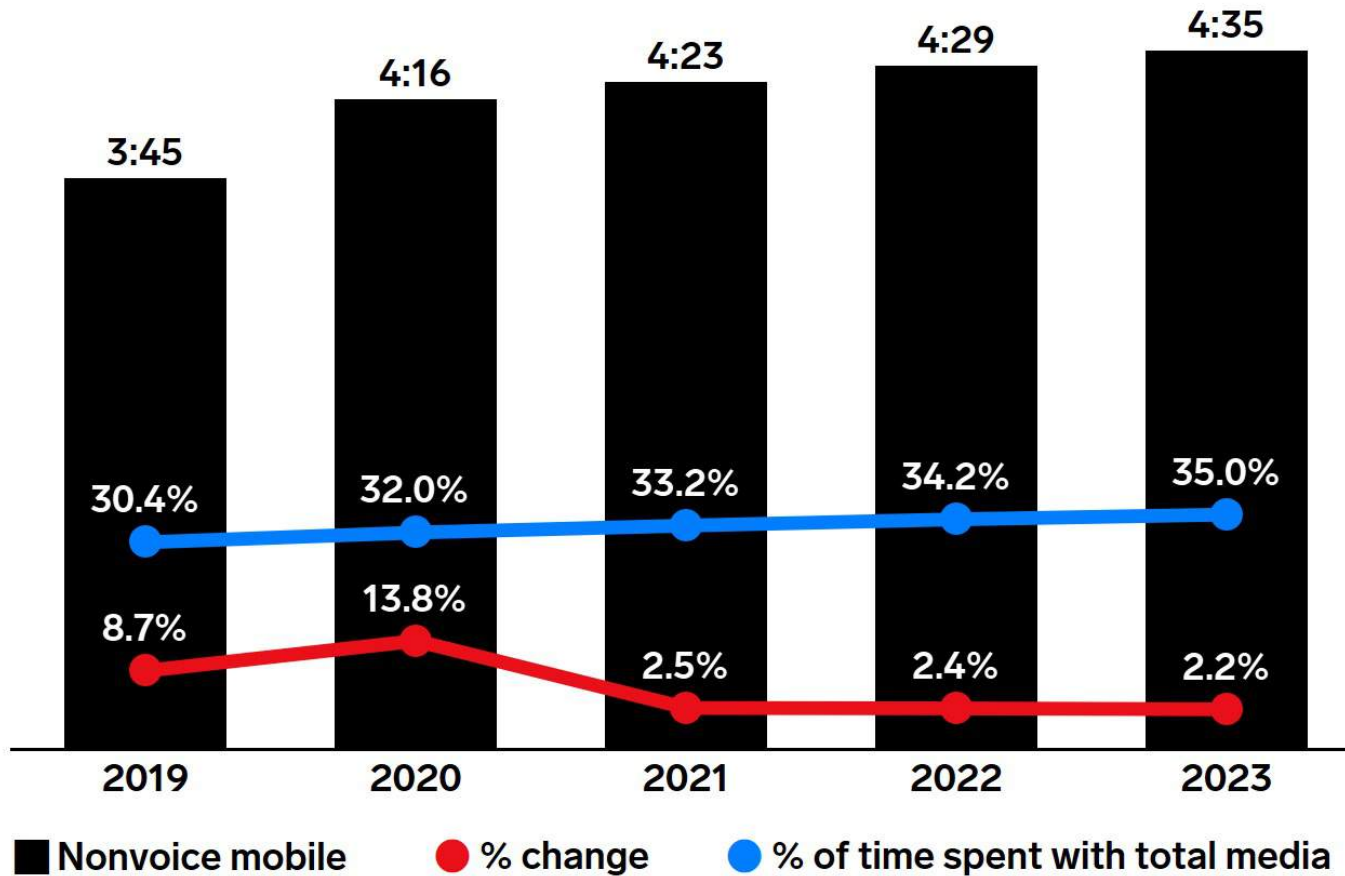
Case Study



Key Learnings &
Looking Ahead

Nonvoice Mobile: Average Time Spent in the US, 2019-2023

hrs:mins per day among population, % change, and % of time spent with total media



Note: ages 18+; includes all time spent with nonvoice activities on mobile devices, regardless of multitasking

Source: eMarketer, April 2021

Top Applications



Our mobile philosophy



Always-on



**Inherently
implicit**

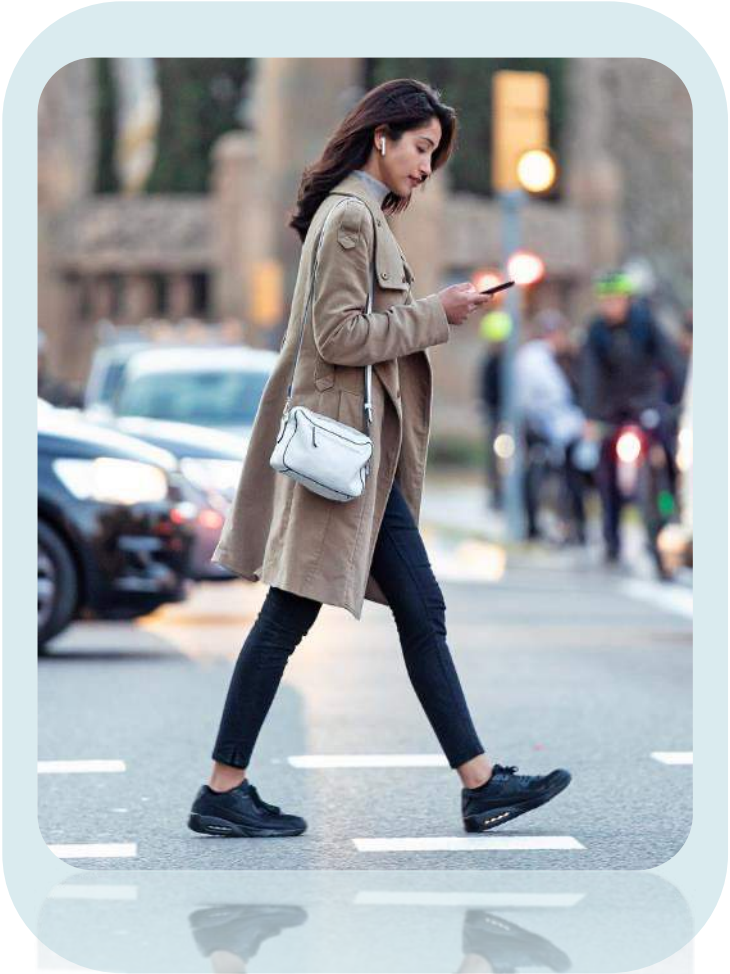
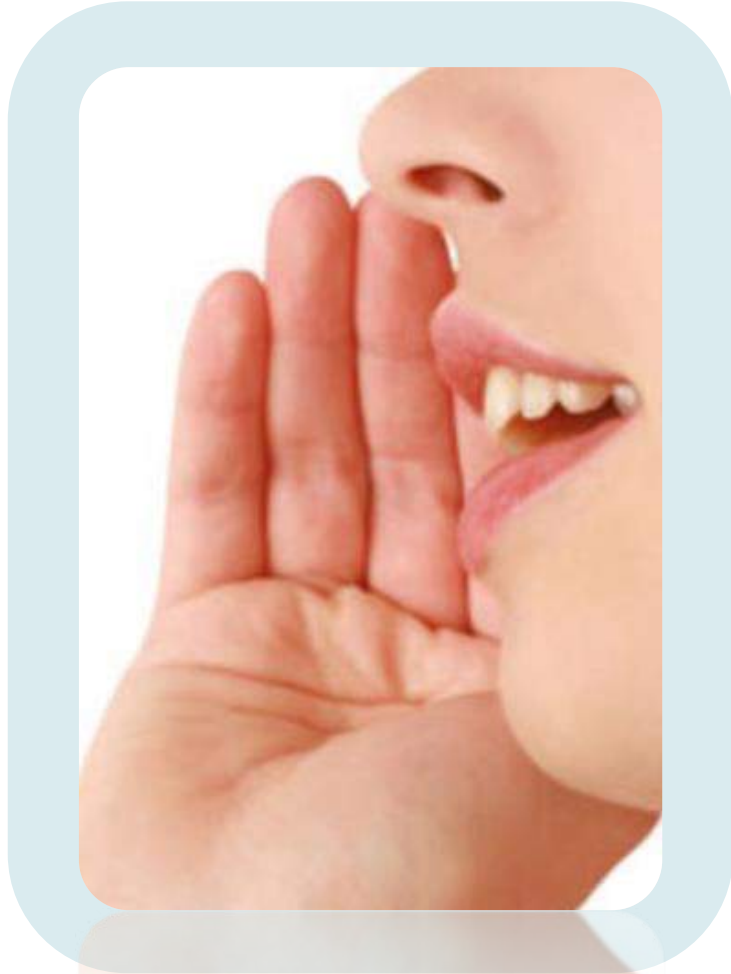


**Interactive &
in-the-moment**



Contextual

What we say vs what we do





Incorporating Context

Geo

Where they are, places they visit

Apps

Mobile behavior, app-based

Buy

Purchase data (receipt scans, e-commerce)

Layer on passive data to broaden and augment your learning

We don't go *anywhere* without our mobile devices. It's an automatic, in-the-moment and intimate experience for most consumers. Inherently behavioral and implicit.



There are

6.4 Billion

Smartphone users worldwide in 2021

US adults spend an average of

~3 Hours

On their smartphone everyday

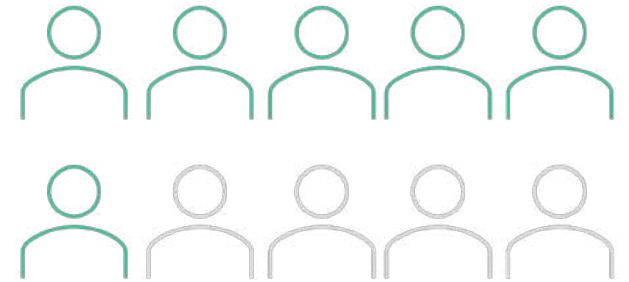
Nearly

7 in 10

Internet users prefer to look for reviews on their phones than via in-store employees **and** use shopping apps on their mobile devices



6 in 10



Say the possibility of mobile shopping is an important factor in brand selection



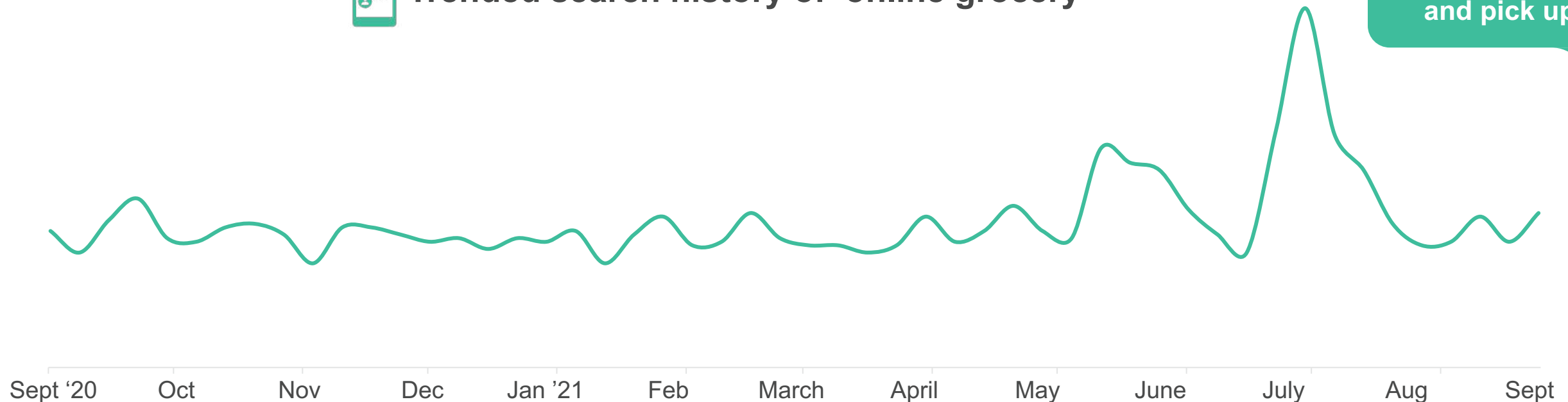
Online Grocery Sales Projected to Reach \$250B by 2025*

Mobile Shopping / App Trends

- Grocery **pick up in-store** is trending higher in search volume vs delivering groceries to home
- Top queries around **grocery apps** are for **Walmart** grocery app and **grocery list app**

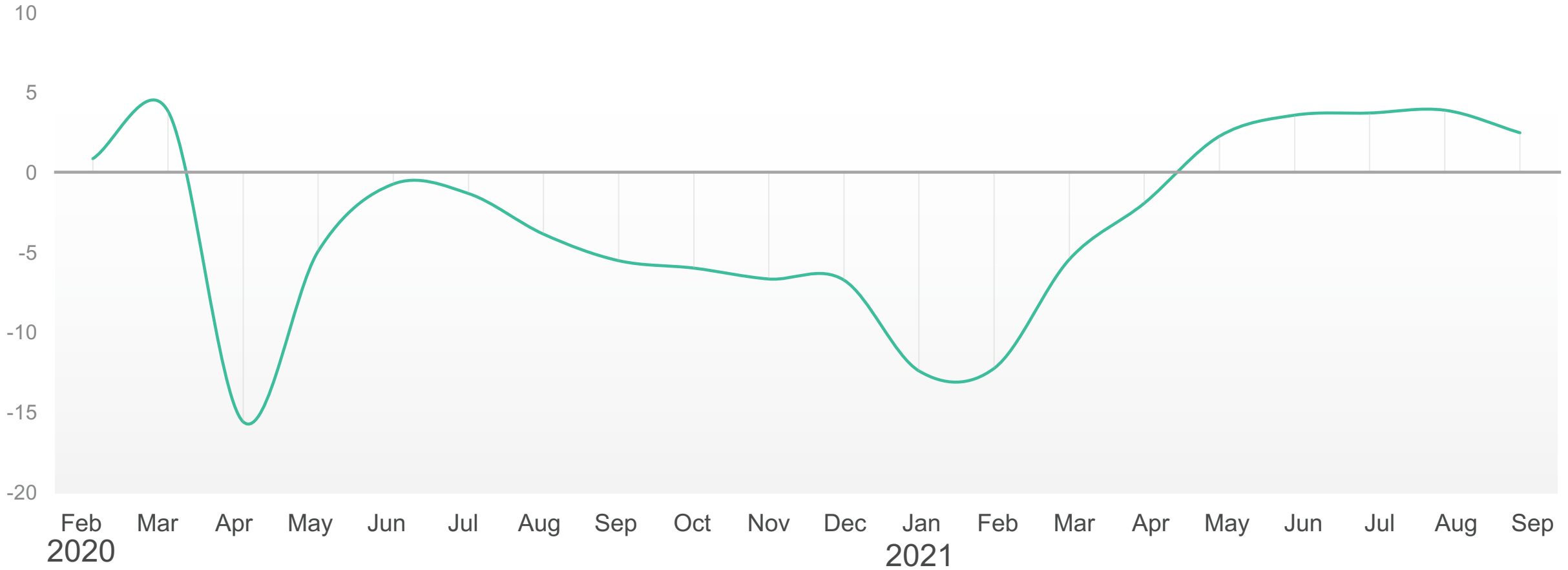


Trended search history of 'online grocery'



700% increase in search frequency for grocery store order online and pick up

Tracking Visits to Grocery & Pharmacy



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Key Learnings &
Looking Ahead

Who we talked to



US

Residents



18-65

Ages



Males & Females

50/50 split



How



120N

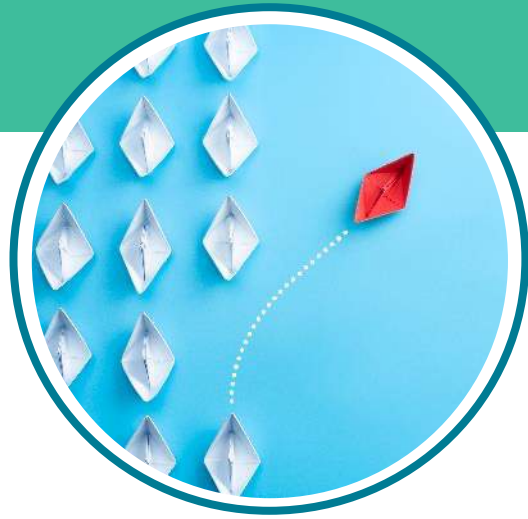
mobile in-store shoppers



200N

at-home online survey

Our Approach



Recent changes
in shopping
habits



At-home
vs.
In the moment Geofencing

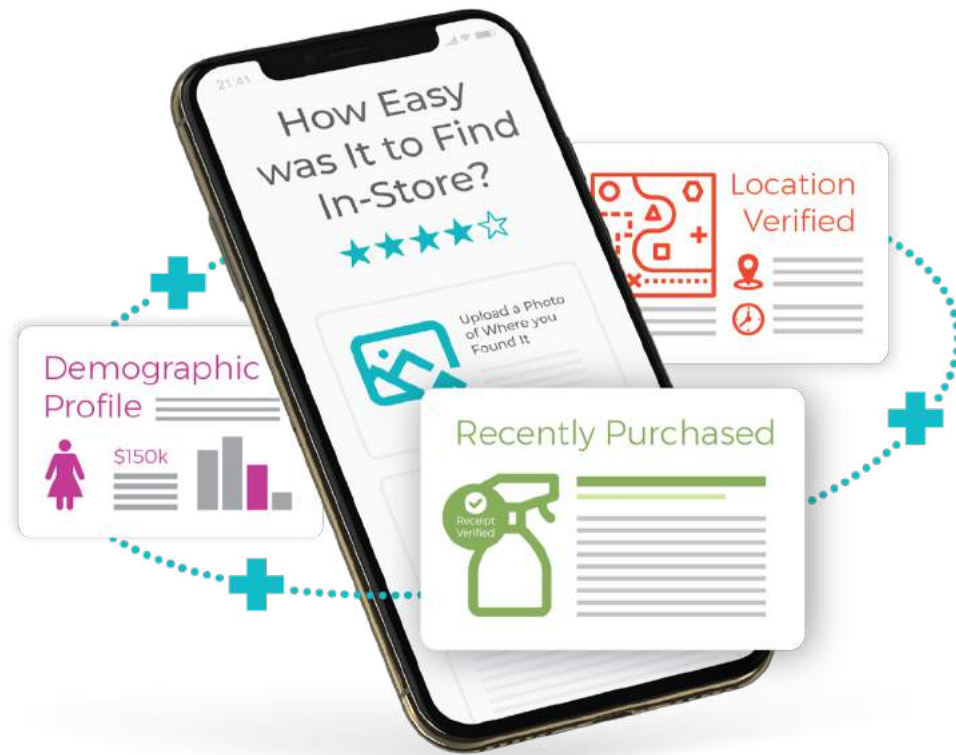


Shopping journey
via video
testimonial &
photos

prodege

Omni-Channel Shopper Data

Prodege's receipt scanning solutions and browser metering capabilities provide visibility into our panel members' online and offline purchase history



Direct Surveys to Validated Shoppers

Target surveys to specific audiences of pre-qualified shoppers using receipt capture or geofencing

Gain Access to Behavioral Data


Analyze shopper data on its own, or alongside responses from a survey or group of surveys, adding behavioral context to consumer attitudes and opinions.

Field Shorter Surveys

With the What, Where and When already determined, your survey becomes more concise, which affords opportunities to include custom questions tailored to your objectives.



How Consumers Shop



How do consumers shop?

In-store

95%

Order online and pick up

18%

Order online and have it delivered

16%

Change in Purchase Behavior

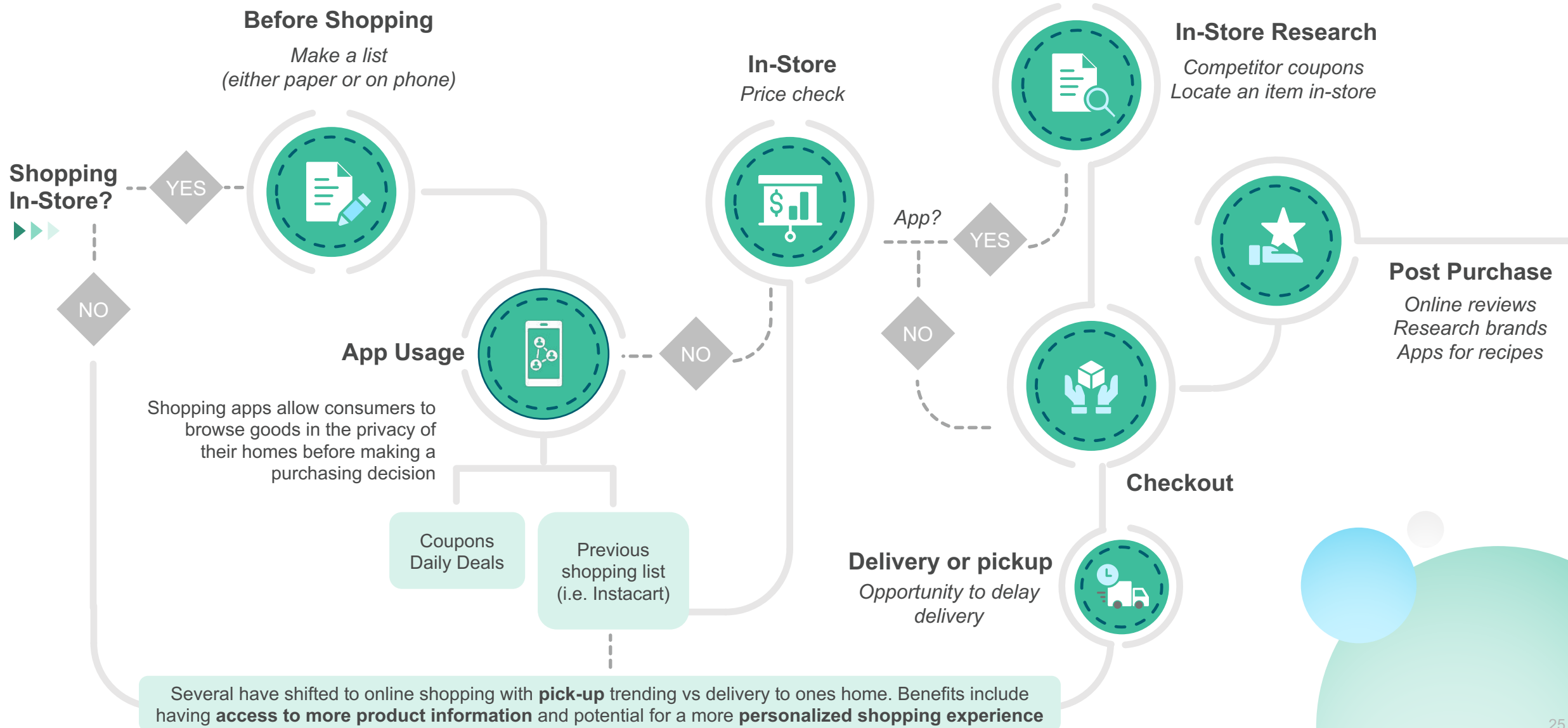


say they have **changed their purchase behavior** compared to **pre-covid**

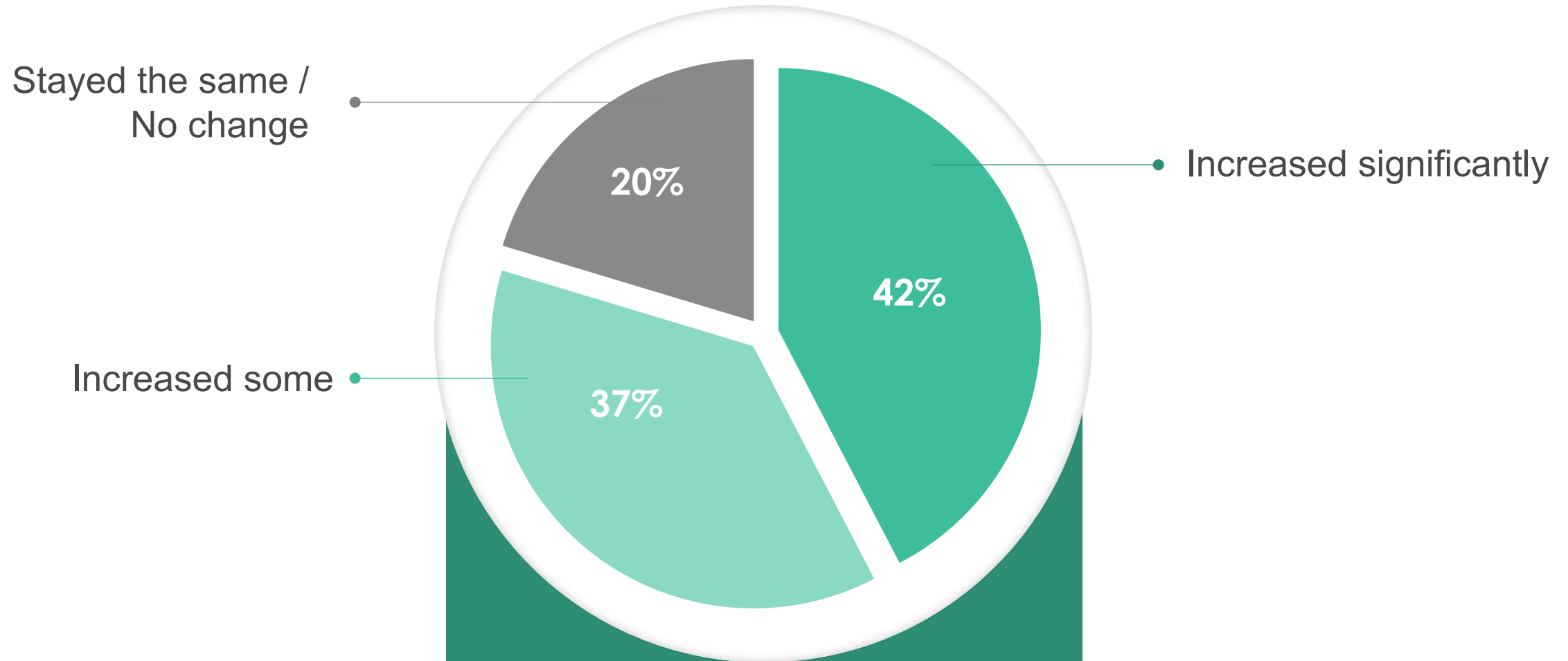
Top changes in behaviors include:



Shopper Journey



Shopping online vs. pre-Covid 19



Key Drivers

selected by ~90%+

- It tastes great
- Is a brand I trust
- Has varieties I like
- Looks appealing/appetizing
- Available in the pack sizes I want
- Is a good value
- It was affordable
- Is made with high quality ingredients
- Is good for the whole family
- Feel good about serving to my family



Those surveyed at home place higher relevance on:

- ✓ Is a brand I trust
- ✓ Is healthier than other brands
- ✓ Is an innovative brand

When shopping for lunch meat, consumers think about...



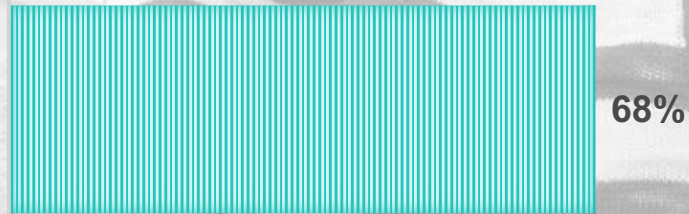
...Price, quantity and convenient packaging because they are trying to find a good value and a size package that can feed a whole family and that doesn't require extra time to prepare.

-Male, 46, WA



How consumers typically purchase groceries online

Part of a major shopping trip, where you are buying a large number of items



A fill-in shopping trip, where you are buying a few items between major shopping trips



Why buy online?

- For convenience (85%)
- To save time shopping (64%)
- To simplify my life (61%)
- To avoid crowds (56%)
- To save money (34%)

Apps while shopping and what used for

At the Store

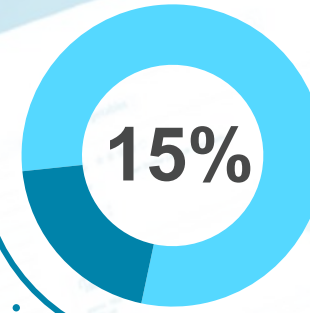
Use an app when shopping for **lunch meat**



- To pre-plan my shopping
- To remember what I had to buy
- To check for coupons
- To check the price / comparison shop

At Home

Use an app when shopping for **groceries**

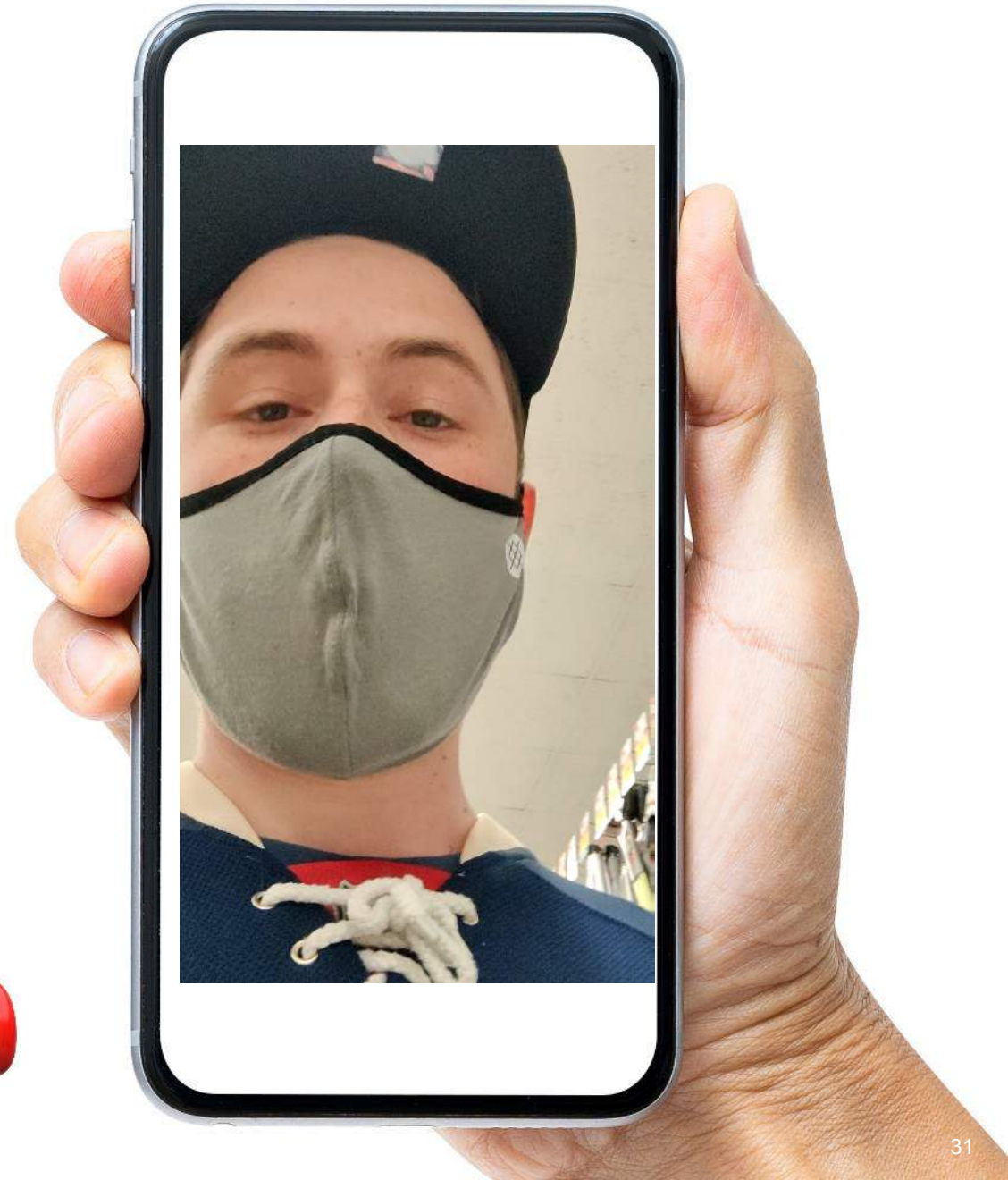


- To remember what I had to buy
- To check for coupons
- To locate an item in the store**
- To check the price / comparison shop
- To pre-plan my shopping

Apps used by at home shoppers



The shopping experience



Top lunch meat brands purchased most often with in-store selections



Majority of those who purchase Boar's Head most often is from those who purchase from the deli counter (vs pre-packaged)





Key Insights & Looking Ahead

Key Insights

1



Smartphones are an integral part of consumers' lifestyle and shopper journey

2



Shopping online & via app is trend that will continue growing and should not be ignored

3



Understanding the shopper journey and the role technology plays in it is a must

4



A lot of synergy exists between at-home and in-the-moment experiences and drivers

Opportunities



1

Understand



Understanding your consumer at a deeper level

2

Personalize



Improve and personalize the shopping experience, including targeted ads/promotions

3

Develop



Build/ strengthening relationship with your customers, leading to brand loyalty

4

Expand



Development of digital D2C experience

5

Succeed



Drive increase in purchase and positive reviews



Thank You!

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