

The logo consists of the words "STELLA" and "RISING" stacked vertically in a white, sans-serif font. They are enclosed within a white circular border that is not fully closed, with a small gap at the top right. The background of the entire slide is black and features various food items: a whole orange in the upper left, a coconut in the upper right, a halved avocado with its pit in the middle right, a watermelon in the bottom left, and several small green and orange seeds scattered throughout.

STELLA
RISING

Stella Rising in Partnership with **Google**

HOW DIGITAL DRIVES PURCHASE

Focus on Food/Beverage

TODAY'S PRESENTERS



**MARLEA
CLARK**

EVP, Marketing +
Insights
Stella Rising



**ALEX
ATILANO**

New Business
Manager, Google



**AMY
REYNOLDS**

Director, Media
Stella Rising



**LEA
GIAQUINTO**

VP, Client Strategy
Stella Rising



The Agency for Rising Stars

The leading marketing and media agency for spirited, high-growth consumer brands and service companies. Our mission is to connect brands with people who will love them—through creative communication, technology, media and human engagement

STELLA INTELLIGENCE

Deep understanding of the consumer and marketplace drives all we do

WORK

- Communications Planning + Strategy
- Acquisition + Investment Diligence Advisory
- Audience + Segmentation Analysis
- Consumer Insights workshops, Presentations + Content
- Brand Health Assessment
- Custom Research Engagements
- Media Mix Modeling + Cross Channel Attribution

TOOLS + DATA

NETBASE

GLIMMER*



HI-CHEW



We developed an audience targeting and communications strategy for brand relaunch that increased aided brand awareness by

23% over six months.

1. THE MARKET

UNDERSTANDING SCALE

Predictions place the grocery
industry hitting

+\$700B

in the next five years



*While 23% of
Americans*

buy groceries online now, that
number is expected to leap to
over 70% within ten years.

NEW GENERATIONAL PATTERNS

Millennials Driven By Convenience

Younger millennials

(under 30, no kids)

typically purchase from **mass merchandisers** (Walmart & Target)

Older millennials

(over 30, often with children)

tend to **opt for a blend of traditional supermarkets and online shopping**

Millennials with children under 18 are much more likely to use smartphones as part of their in-store grocery shopping trips than are those without children

43% of all millennials

report occasionally or fairly often shopping for groceries online while **58% of millennials with children** do

27% of all millennials

believe they will **shop more online** in the next two to three years to help them in eating well

“Instagrammable” food is increasingly vital to millennials

NEW GENERATIONAL PATTERNS

Gen Z is coming up quickly

- A generation that feels strongly about hobbies, Gen Z has an interest in **cooking and meal prep**
- More driven by **health** and **more adventurous**
- Generally, Gen Z **expects a highly omnichannel experience** from retailers: they like shopping in-store with mobile support
- Gen Zers love **fast-shipping** and will push retailers on speed, sustainability, and price
- Gen Z is driving visual search

Value Matters

Though Kroger's total site visits across desktop and mobile have gone down 12% YOY, traffic to its *discount-related pages* has increased by 3%.

—Gartner L2 May 7, 2019

2.

A HEALTHY CONVERSATION



SHIFTING VIEWS OF HEALTH

More than

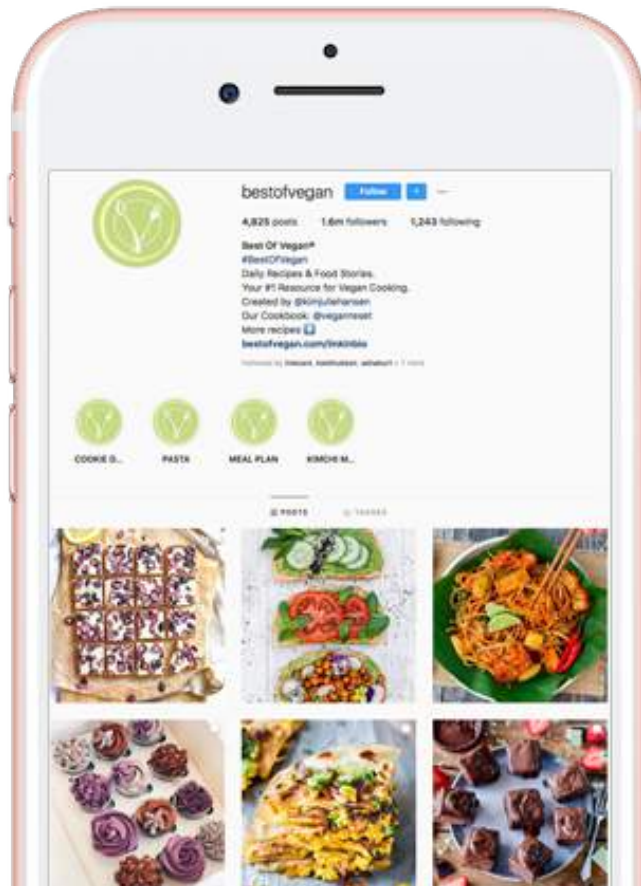
8 in 10

consumers agree at least somewhat
that home-cooked food is generally healthier
than restaurant meals

freshness

is being increasingly prioritized, and consumers
are beginning to equate fewer ingredients with
greater healthfulness

A NATURALLY SOCIAL CONVERSATION



#Food is a top category
on social, driven by
great images

#instafood #foodporn

health + diet concerns

#cleaneating #veganfood

emotional connections

#love #yummy





VEGAN IS THE NEW ORGANIC

Phrases like vegan, organic, and vegetarian all pop, but vegan is growing fast.

“vegan” was mentioned 1M times more than “organic”

Consumers are more focused on ingredients today than ever, while “organic” is an older, more Gen X term

Other fast-growing terms include plant-based, clean eating, and gluten-free



My first gluten free vegan pizza recipe 🍕🍕 Thanks to @violife_foods for the great cheeses
– tastefromearth



BETTER-FOR-YOU BREAKFAST

#Breakfast is a consistently strong hashtag and is the only meal included in the top 25 hashtags

Consumers engaging in this conversation are seeking better-for-you options for breakfast more than any other meal

Breakfast is often depicted with a meal-replacement shake, juice, or smoothie



Healthy breakfast
💖
– fashion_fire



NATURES CANDY 🍓
Easy snack to pre-
prep and grab on
the go. -- dinajuve



CONSUMERS ARE TORN BETWEEN WELLNESS AND INDULGENCE



WELLNESS

Plant-based
Ketogenic
Vegetarian
Vegan
Gluten-free
Soy Free
Whole 30

INDULGENCE

Fine dining
Instagram worthy
Exotic cuisine
Unique ingredients
Non-health focused food



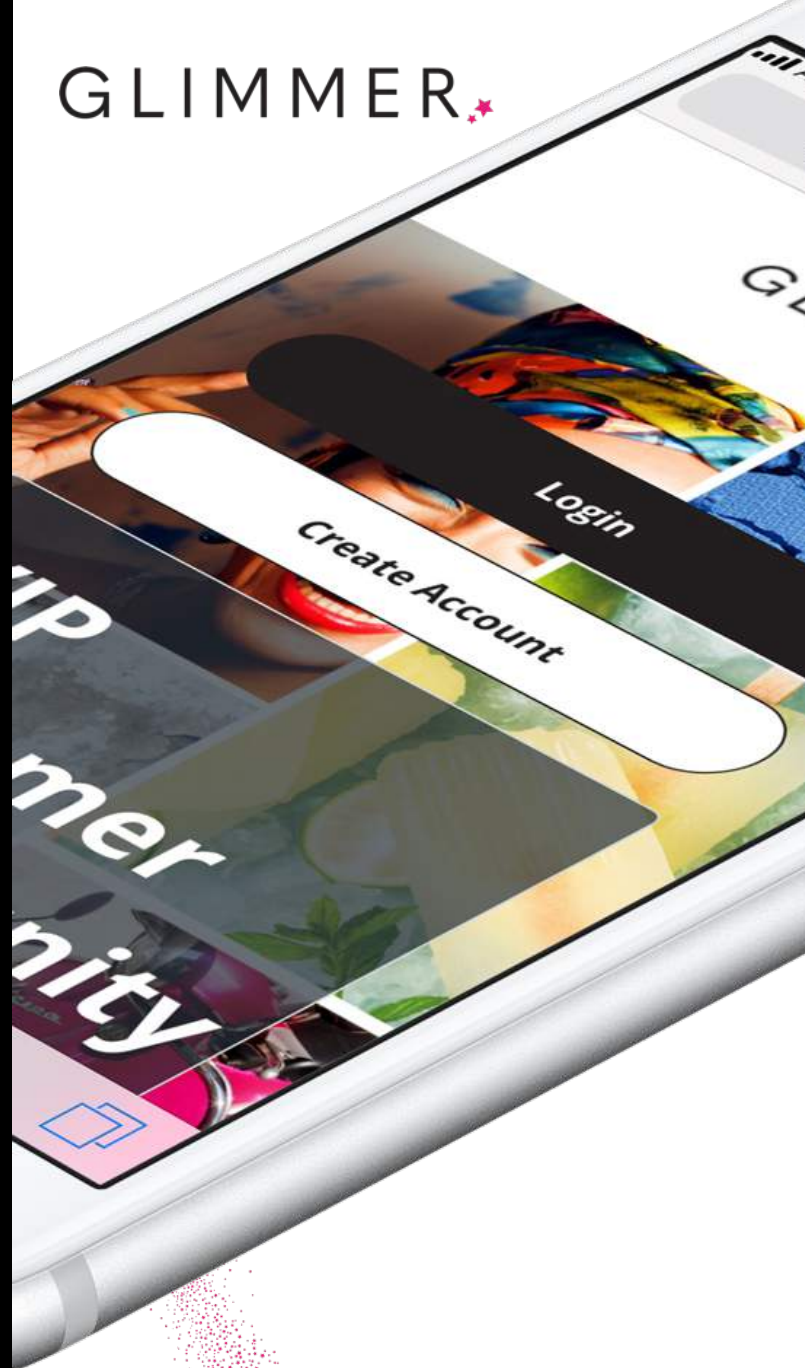
3.

HOW SHE SHOPS

GLIMMER[★]

GLIMMER INFLUENCER COMMUNITY

*Tap into our proprietary
insights community to
activate and illuminate
your brand*



STELLARISING x Google

Our community members are grassroots influencers who love to share their opinions and thoughts, fueling **first-party qualitative insights** in real time, from real women.

- Spark discussion, engagement, and generate brand advocacy through sampling
- Leverage 1st party community data to further refine brand messaging and create a one-to-one dialogue with engaged consumers



PROFILING THE DECISION MAKERS



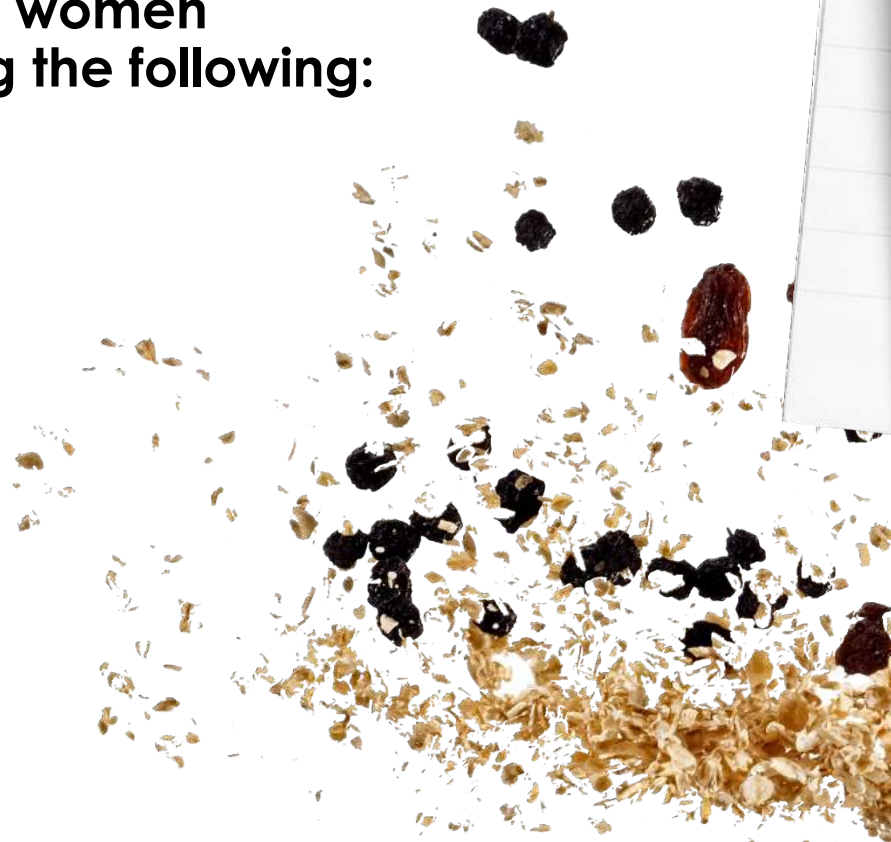
Of the women we surveyed,

71%

reported that they are solely
responsible for grocery
shopping

UNDERSTANDING HER BUDGET

In a typical week, women
reported spending the following:



SHOPPING LIST



PRIORITIZING HEALTH IN HER CART

91% remarked that they try their best to

incorporate healthy food & beverage

items into their diet. However, they “are not obsessive about it”

Nearly half spend
24% to 49%
of their budget

*on healthier, organic,
and/or natural foods
& beverages*

SEEKING SOMETHING NEW

77%

purchased a new “**better-for-you,**”
natural, or organic item in the
last year.

80%

said that they incorporated that new
product **into their lifestyle.**

Of those that did not re-purchase,
price was the biggest inhibitor (53%
noted the product was too expensive)



What are they trying?

25%



dairy
free milks

24%



new
snacks

20%



new
pantry
staples

BUT IT MUST BE DELICIOUS

For Natural/Organic Food & Beverage shoppers,

Taste, Family & Nutrition

are the Top 3 factors when buying food. **Retailer** and **Brand** are the least important factors.



81%
said that **Taste** was
very important

58%
noted that
nutrition was very
important



FREQUENT SHOPPERS GO MASS

Where women shop for natural food each month

32% of women visit a **mass merchandiser** at least five times a month for their natural foods

27% choose **traditional supermarkets** for these items at least five times monthly



GENERAL SHOPPING PATTERNS

Not Brand or Retailer Loyal

56%

of consumers say that the **retailer or brand is not a top factor** when purchasing

Where Are They Discovering?

27%

sampled and then purchased

25%

browsing in store

14%

recommended **by a friend**
(in person or on social media)

Omnichannel on the Rise

1 in 4 moms

now uses a mobile barcode to scan a coupon in-store.
Technology will continue to gain traction as the physical and digital worlds blend

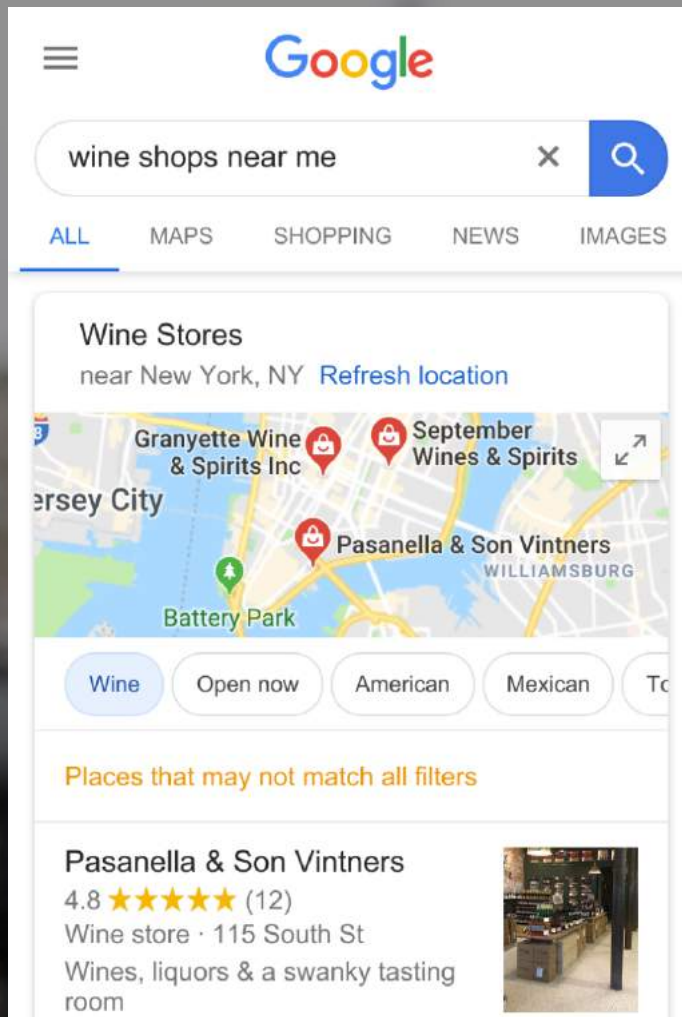
4.

GOOGLE

30 years ago



Today

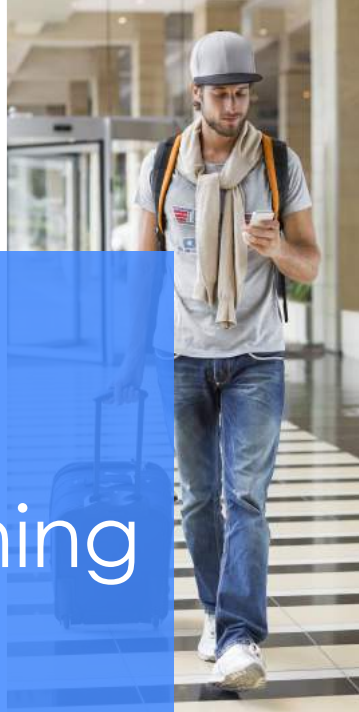


Too. Many. Choices.



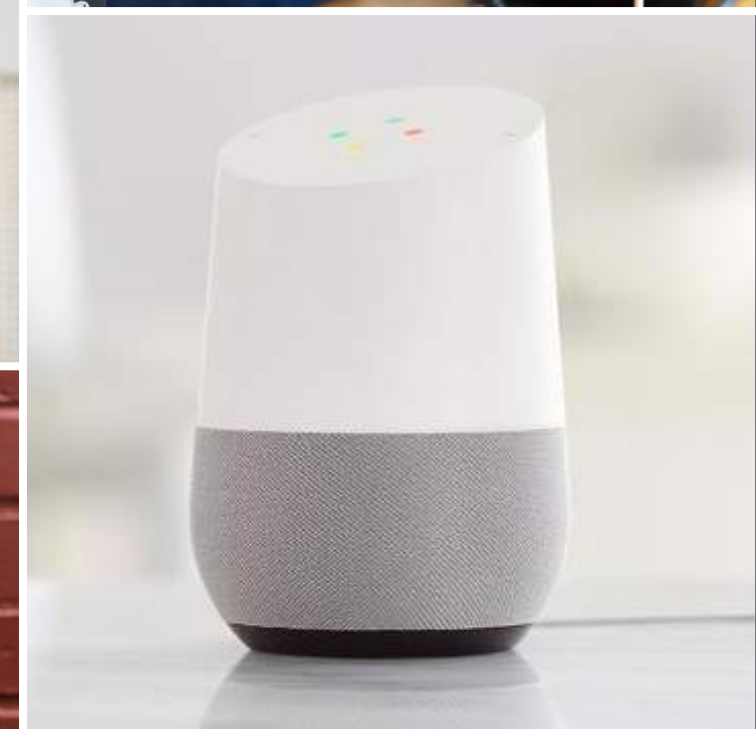
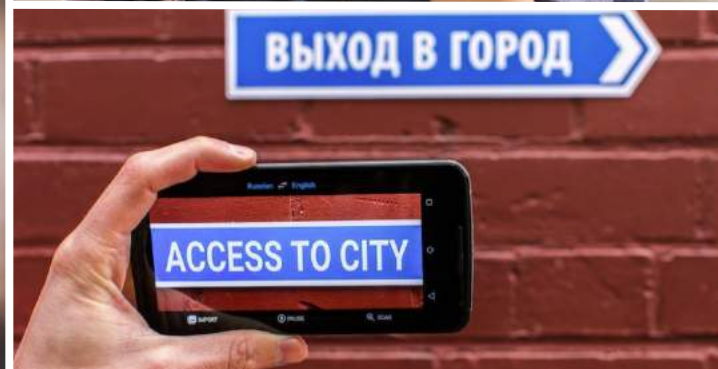
How do we make sure
they choose **you**?





Hi, how can I help?

Connectivity has changed everything

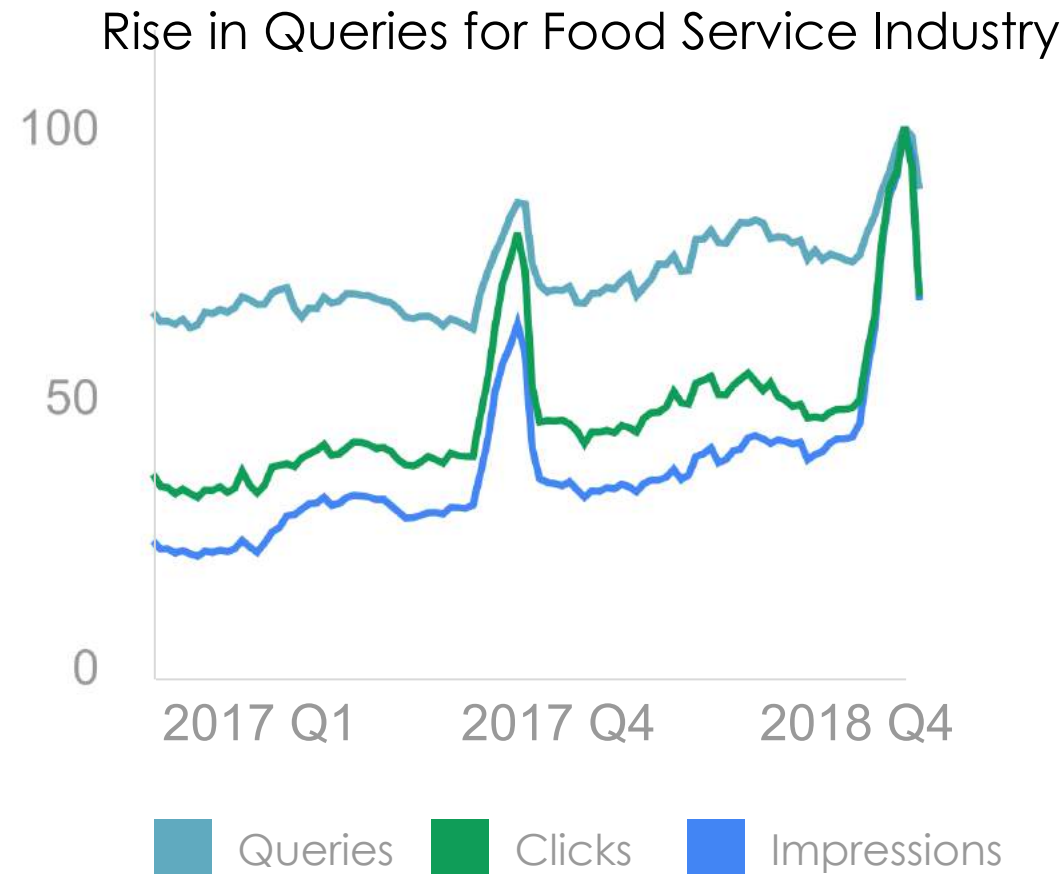


There will be

3.5M

Searches in the Food Service
category in 2019, up 131% YoY

62% of Searches are Largely Driven by Mobile



Top Trends

to help reinvigorate Food & Beverage brands (B2B and B2C)

TREND #1

Mobile satisfies
food &
beverage
needs

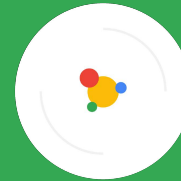
Mobile = Doctor

Mobile = Assistant



TREND #2

Act locally,
think globally



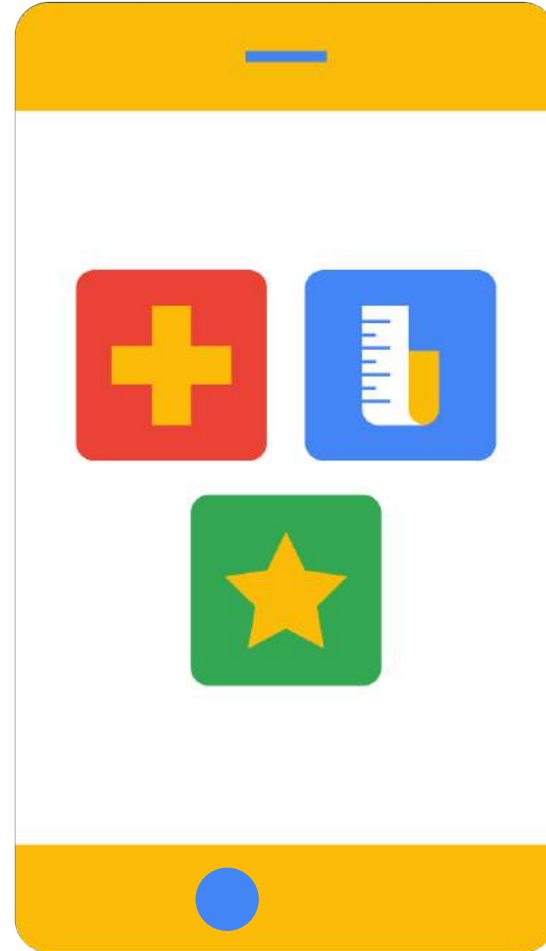
TREND #3

Visual and
emotional
messages win



TREND #1

**Mobile satisfies
food &
beverage
needs**



60%

of smartphone users have discovered a new business or service when conducting a search on their smartphones. *(significantly higher YOY)*

Insight

Mobile = Doctor



#3

Health is the **3rd most searched** food-related theme on mobile.

It represents **9% of food-related queries** made exclusively on mobile, after the very expected **"near me"** (55%) and **"how to"** (16%) searches.



"Teach me health" queries (*"healthiest fast food", "how long does it take to digest food"*) are 3 times more likely to be run from a mobile than from a desktop.

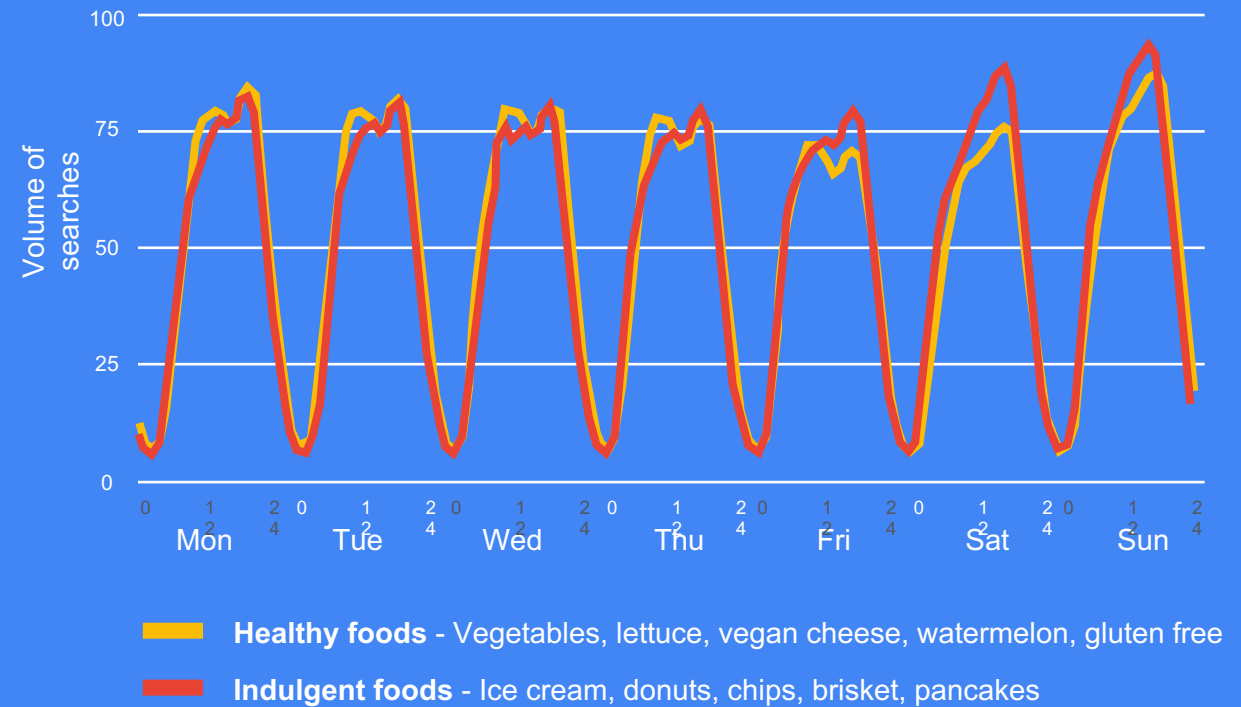
Insight

Mobile = Doctor

Health queries come earlier in the day and week

In the US, searches for healthier foods (eg. salads, fruits) are higher during weekdays, while searches for more indulgent foods are higher during the weekends

Americans look for healthy options earlier in the week and indulge on weekend dinners



Consumers are turning to YouTube to cook up new recipes for their health



[Boost Your Immune System with Garlic Infused Honey \(recipe\)](#)



[3 Detox Juice Recipes for Healthy Skin & Digestion](#)



[Health Benefits of Turmeric](#)



[10 most healthiest foods for human body in the world - healthy food list and their benefits](#)

Viewers around the world flock to videos that share Food Care hacks about topics, including **immune system boosting, cleansing, digestion improvement and weight loss.**

Common formats include **before and after, special combinations and recipes.**

views of detox videos on YouTube

Source: internal Google data, Q1/Q2 2017 in US

Insight

Mobile = Assistant

“**Prepare a meal**” is the top task request for Assistance

81% of surveyed Assistant users say they used it to prepare a meal in the past week

	TOPIC	TASK	HIGHEST INCIDENCE IN THE PAST WEEK (Weekly Prevalence)
1	Meals	Prepare a meal	81%
2	Media & Music	Listen to music	81%
3	Media & Music	Read the news	80%

Source: Weekly Prevalence for 275 tasks. n = 3m responses total, June 2017, US

Working Parents have a significantly higher daily incidence for this task when compared to the general population



Source: Working Parents are defined as 25-44 years old in a dual income HH with at least one child aged 0-18 (Google Surveys). n=226k responses across 24 tasks surveyed for Daily Prevalence. January 2018, US

Frictionless Experiences Driven by Voice and Visual search

Seamless shopping on the Google Assistant



"OK Google, buy kombucha"



Okay, I found something from Target on Google Shopping. I can get kombucha for \$4.99. Should I add that to your cart?



"Yes, please."



I've added it to your Google Shopping cart.



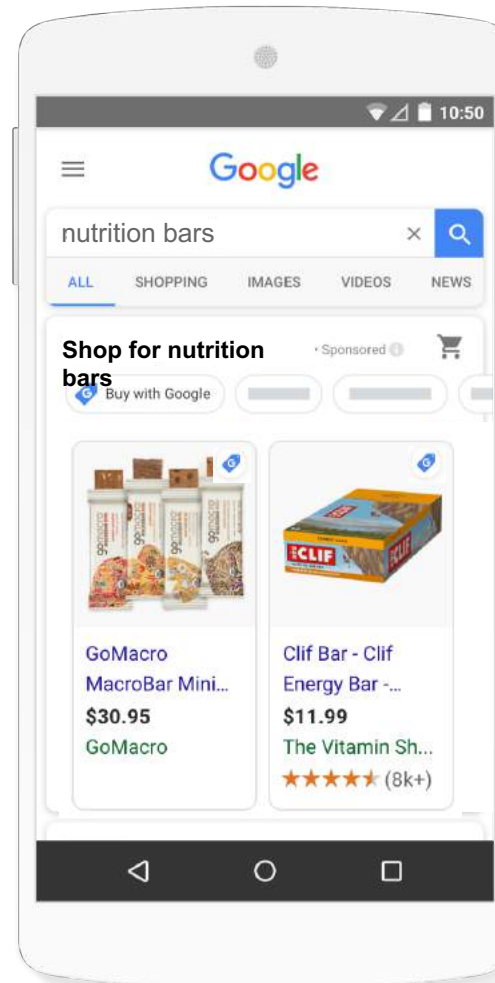
"OK Google, add Cheerios to my shopping list."



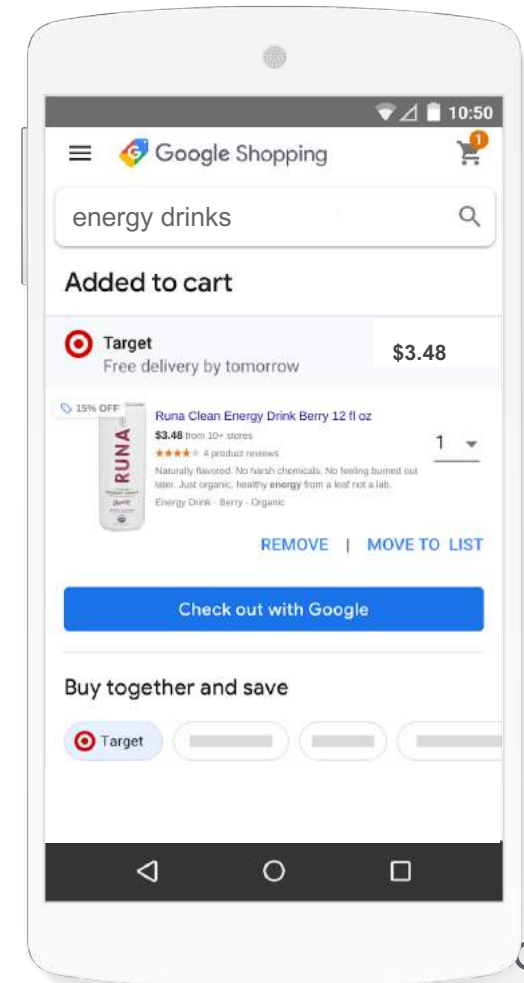
Added.



Buy with Google across surfaces



Merchant specific basket building & fast checkout



TREND # 2

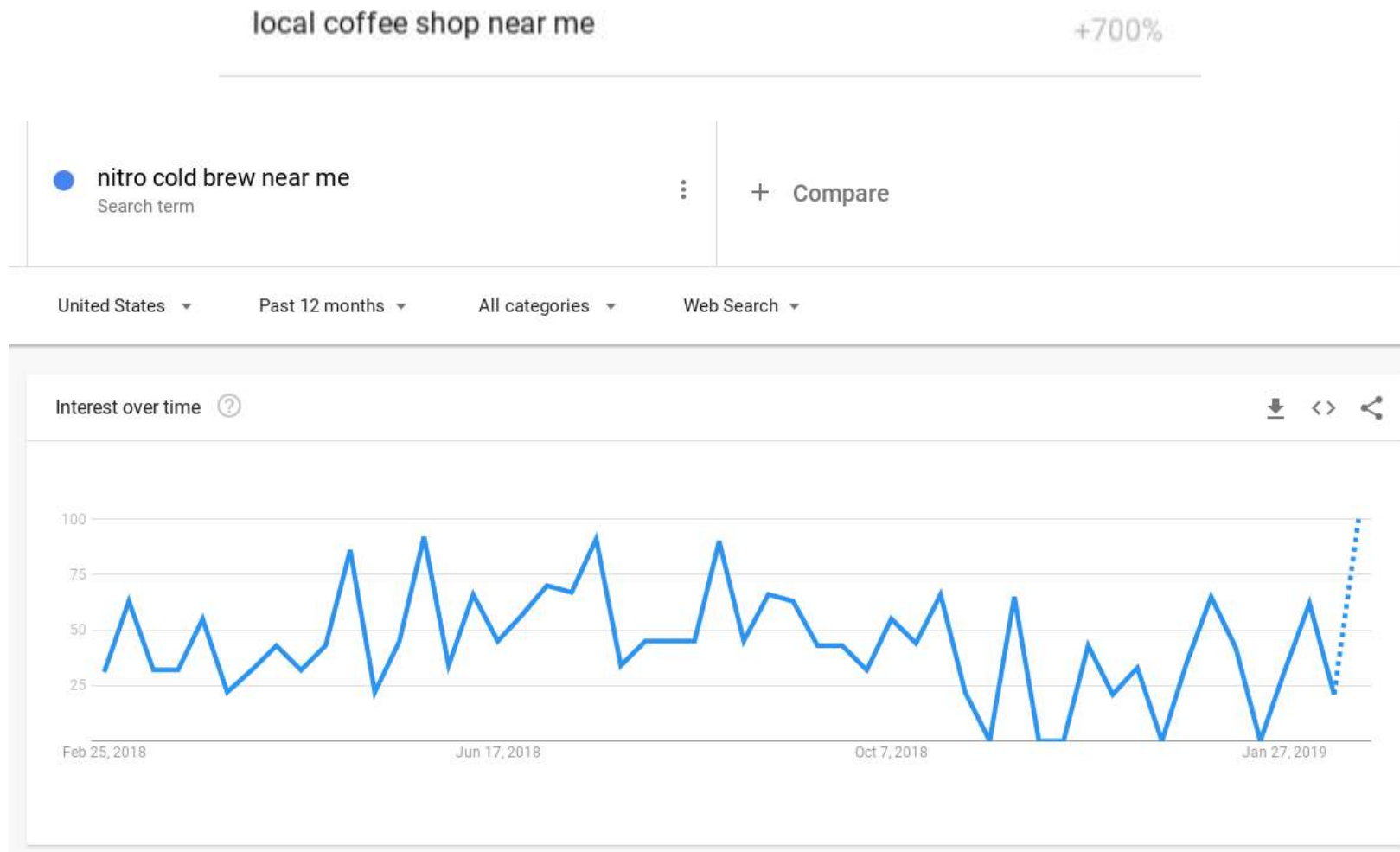
Act Locally, Think Globally



Mobile searches for
"Open" + "now" + "near
me" have grown by over

200%
over the last two years.

“Near Me” Terms Are Becoming More Prevalent



RISE Brewing Co.

Website Directions Save

5.0 ★★★★★ 1 Google review

Coffee wholesaler

Address: 425 Fairfield Ave, Stamford, CT 06902

Hours: Open · Closes 3PM ▼

Phone: (646) 400-0410

Suggest an edit

Know this place? Answer quick questions

Questions & answers

Be the first to ask a question

Ask a question

Send to your phone

Send

Reviews

1 Google review

Write a review

Add a photo

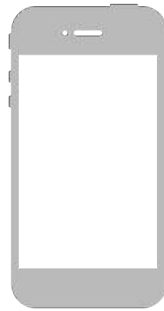
From RISE Brewing Co.

"We make nitro cold-brew coffee kegs and cans for offices, bars/restaurants and cafes throughout the country. Our coffee is organic, non-GMO, fair-trade, single-origin, non-dairy and 0 calories. Think a super light, refreshing stout beer meets iced...[More](#)

Feedback

<70% of Consumers Who Use Ad Features Say It's Important to Have Location Information In Ads

SMARTPHONE



73%

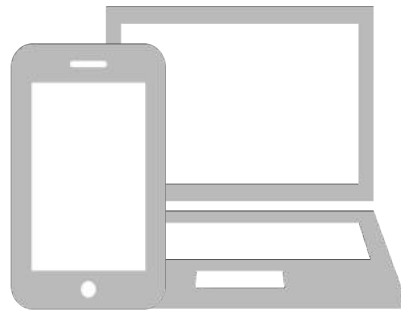
Think
Get Directions
is important



70%

Think
Call Button
is important

COMPUTER/
TABLET



78%

Think
Local Address
is important



77%

Think
Phone Number
is important

Find insights now:
marketfinder.thinkwithgoogle.com

Sell to the whole world

Take your business to new customers around the world.
Let us know a little about your business to get started.

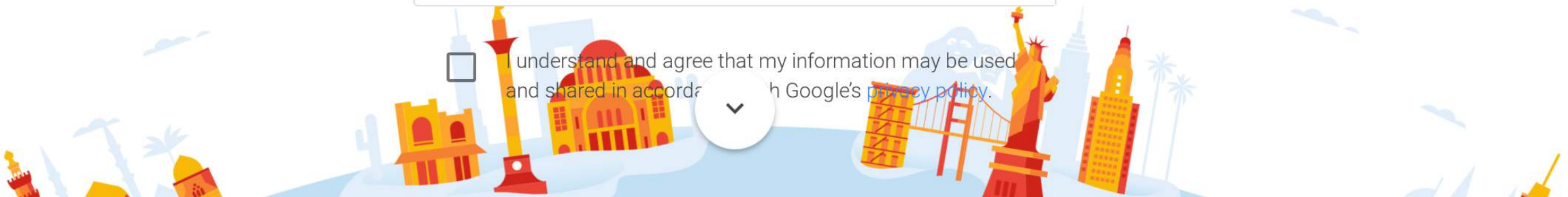
 Website

 App

myfoodservice.com



I understand and agree that my information may be used
and shared in accordance with Google's [privacy policy](#).



Market Finder

Find insights now:
marketfinder.thinkwithgoogle.com

1



United Kingdom

~ 23m

Monthly searches across
categories ?

\$0.44

Google Ads recommended bid ?

#7

Ease of doing business index
(rank) ?

\$30.1k

Household net disposable
income ?

2



Germany

~ 15m

Monthly searches across
categories ?

\$0.82

Google Ads recommended bid ?

#17

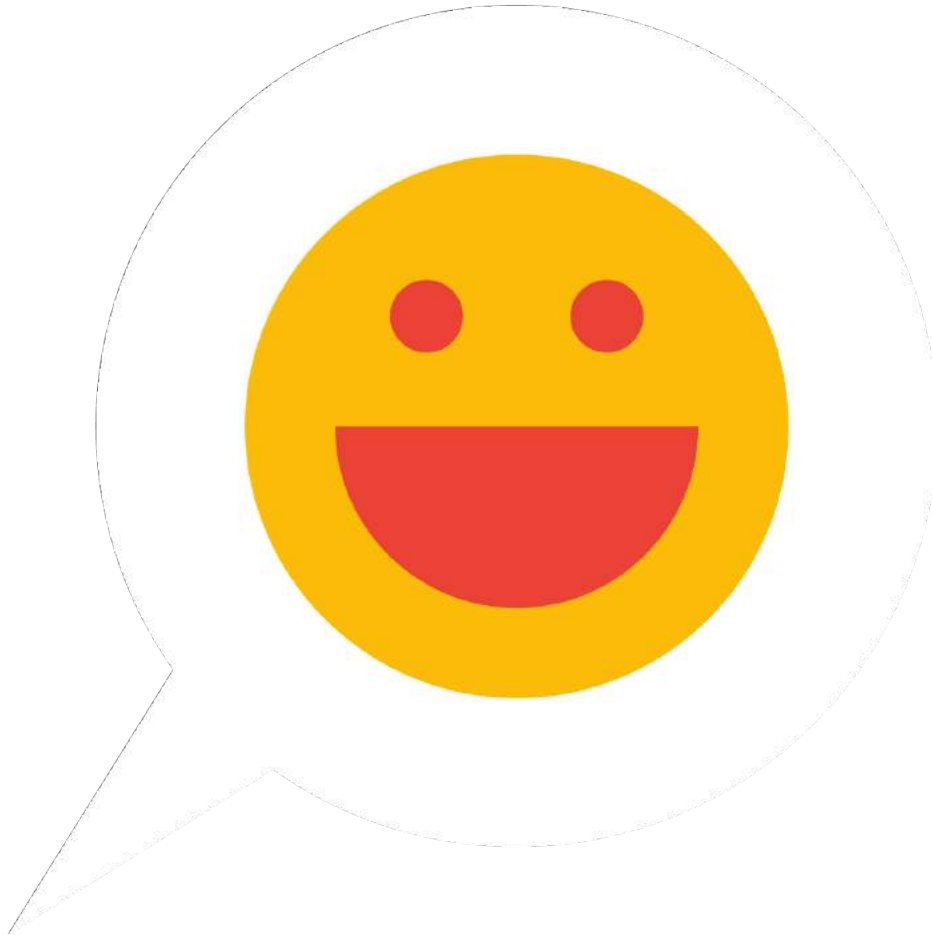
Ease of doing business index
(rank) ?

\$36.2k

Household net disposable
income ?

TREND # 3

Visual and Emotional Messages Win



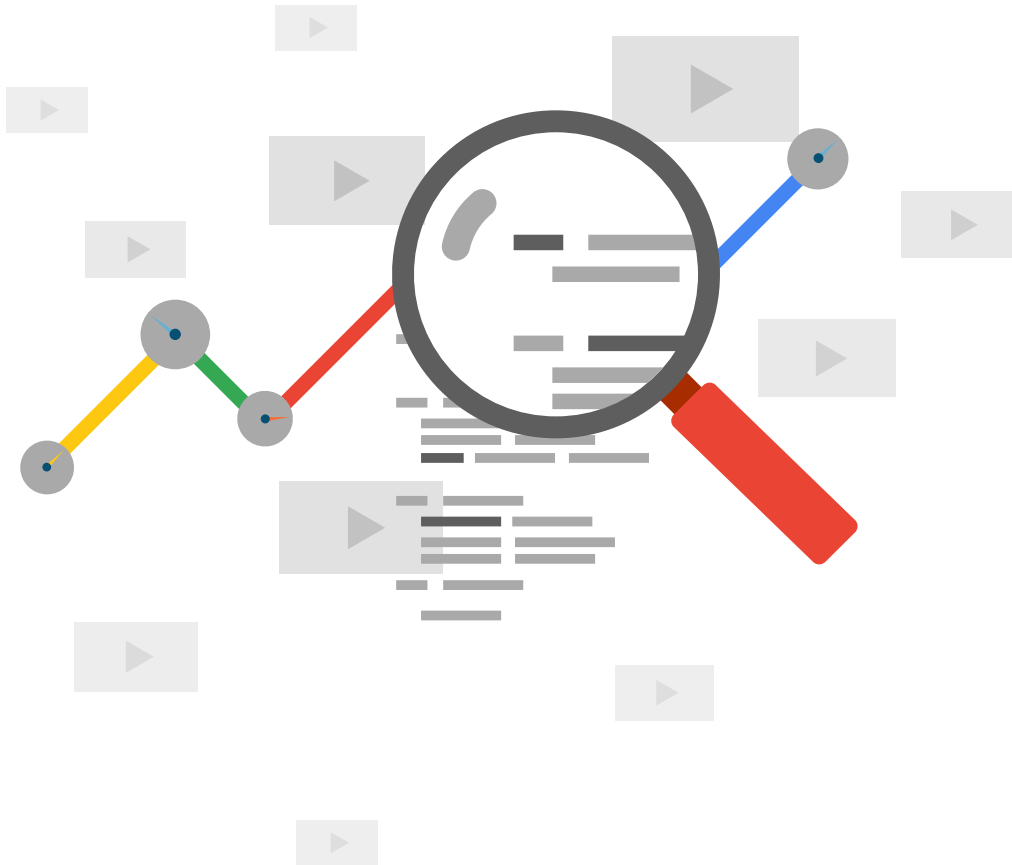
In a world of never
ending
distractions...

STELLARISING x Google



...the average human attention span
is now 6s, less than a goldfish

Insight Make it Immersive

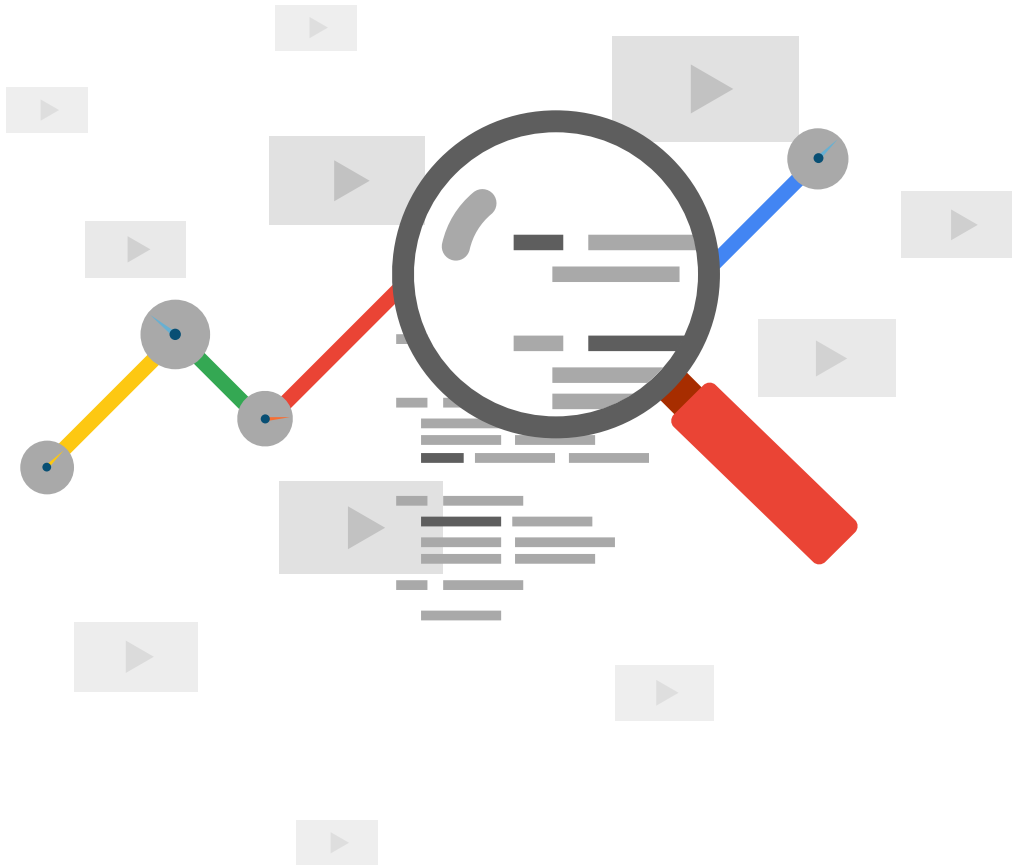


Immersion captures users' full attention, leading to stronger user engagement: **40% higher View Through Rate** vs. standard 2D mobile ads in US and **32% higher recall** vs. standard ads



Maker's Mark Old Fashioned 180
VR

Insight Break Down Messages



A large majority (82%) of best in class Food & Bev YouTube Ads (in terms of Ad Recall) focused on a single message, with another 17% focusing on just two messages.



Quaker (US) “Parents Report Card”

Source: BrandLab-exclusive analysis of a sample of 100 videos across 15 markets, Feb 2018

Campaign Implications

When developing creative...

Craft your creative asset with a single message for consumers to connect with

When targeting your audience...

Go after the most qualified Food & Bev audiences with consumer patterns

When orchestrating delivery...

Trigger a “Feel Good” effect by combining a simple emotional benefit with contextual alignment

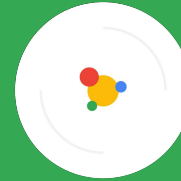
Three Takeaways

to Help You Stay Competitive

Create assistive experiences and make mobile your friend



Deliver relevant personalized experiences with targeted local and global strategies



Connect with audiences emotionally through video



**Are you keeping
your lights on?**

Explore Your Digital
Options **NOW**



5.

CASE STUDY

A Brand with a Colorful Story:



The Brand Story

As a leading brand within a high growth snack segment (Vegetable and Fruit Chips), TERRA Chips needed to both *defend its position in the marketplace* and *increase purchase* to order to grow

Business Goal: +10%+ revenue and +.5 points HH penetration

The Marketing Challenge

Consumers do not view TERRA as an everyday snacking item

Opportunity: Most salty snacks are not a lively feel-good snack... And TERRA Chips can be that solution!

The Approach

To drive awareness of TERRA Chips as the **fun and colorful solution** for the typically-beige everyday salty snacking.

The “Snack in TERRAcolor” campaign was developed to hero the distinctive flavor and beauty of the brand’s vegetable roots... **positioning everyday snacking as much more enjoyable!**



Effective messaging + a ripe, receptive audience = IMPACT!



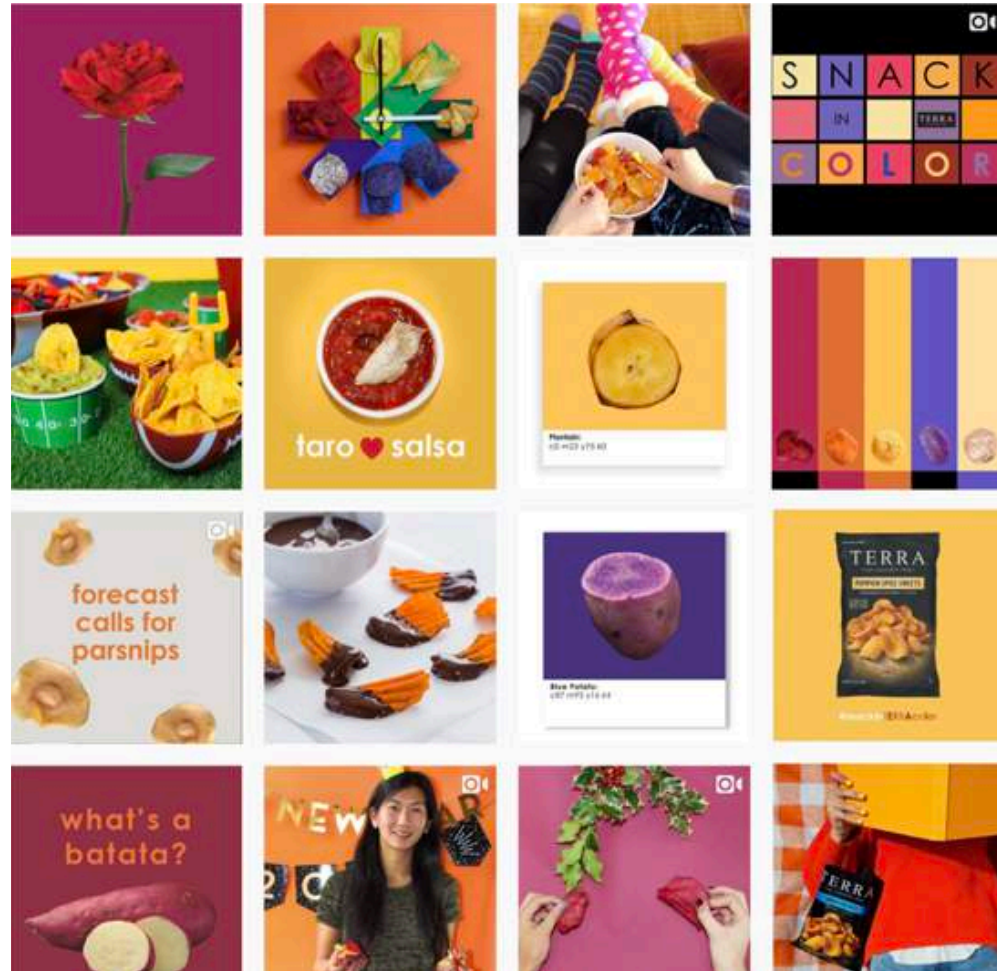
Our **target audience** was an affluent Millennial snacker, who was identified as the consumer most likely to be receptive to our mission!

The playful messaging was **connected to consumers** through a powerful multi-channel digital program, *aligning with our target's consumption and behaviors*:

- Rich cross-platform digital video to launch our story
- Mobile and Social-first to intercept and connect



The Results have been anything but Beige



Together, we are Building a Brand with a differentiating point of view:

- Aided Awareness **+15.25%**
- Purchase intent **+8.30%**

Which is equating to truly moving the business:

- HH penetration grew +.05 points
- +20% Sales connected to media impact (\$1.39 Media ROI)

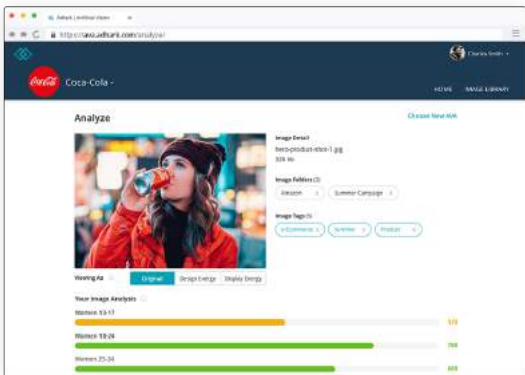
4.

VISUAL VALUATION

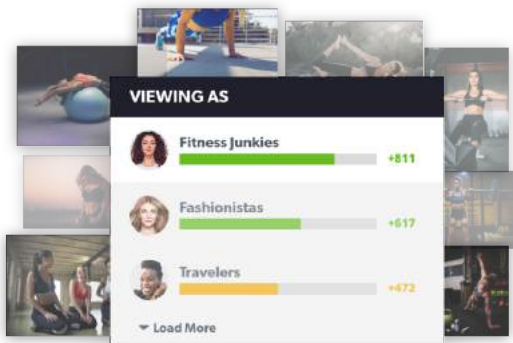
What if you could use
AI to instantly know
what imagery will drive
more sales?

Visual Intelligence answers key brand questions

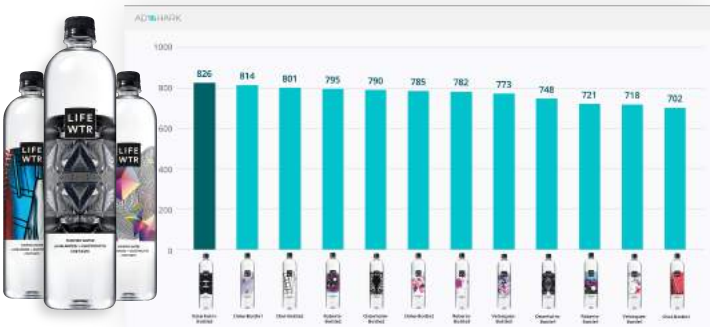
Who do I appeal to?
Brand Marketing & Category Insights



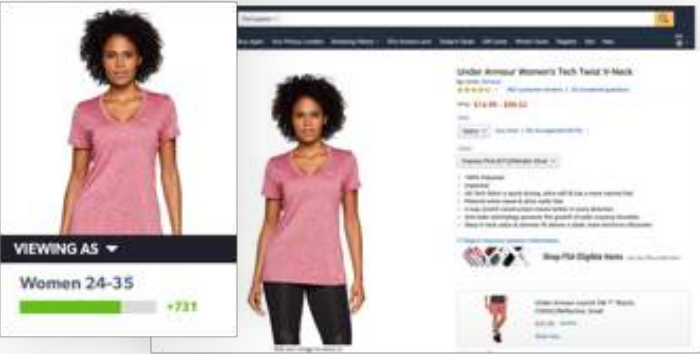
Which creatives will maximize results?
Paid Social Pre-Campaign Optimization



Will this resonate with my audience?
Real-Time Creative and Pack Testing



Which images will drive more conversions?
E-commerce Visual Optimization



DISCOVER YOUR BRAND'S VISUAL VALUATION

OFFER TO WEBINAR PARTICIPANTS

To help your brand assess current creative and understand how prepared you are to meet consumer demand for visual search, Stella Rising will offer webinar attendees a Visual Valuation that includes:

1. Who does my current imagery appeal to?
2. Which audiences are my visuals over-indexing and under-indexing with?
3. Is your brand ready for Visual Search?
4. Provide examples of brands that have highly engaging visuals for my target audience(s)?

FOR DETAILS CONTACT

LEA Giaquinto

lgiaquinto@stellarising.com

Or

MARLEA Clark

mclark@stellarising.com

The logo consists of the words "STELLA" and "RISING" stacked vertically in a white, sans-serif font. They are enclosed within a white circular border that is not fully closed, with a small gap at the top right. There are a few small orange dots scattered around the logo.

STELLA
RISING

The background is a solid black field. Scattered across it are various fruits: a whole orange in the upper left, a coconut in the upper right, a halved avocado with its pit in the middle right, a watermelon in the bottom center, and a small green lime in the top left. Several small orange seeds are also visible, particularly near the bottom center.

THANK YOU

Stellarising.com