

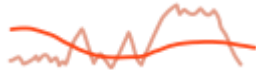
Uncovering Emerging Innovation at Mars Petcare

MARS

BLACK
SWAN
DATA

GUT HEALTH

+34%

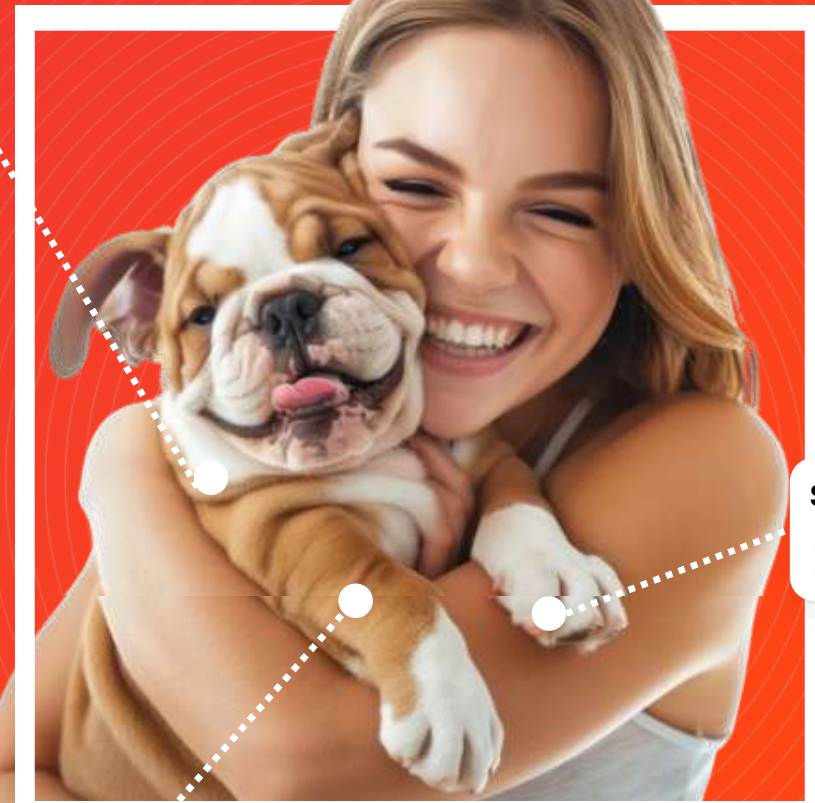


SHINY FUR

+5%



HEALTHY EATING+11%



Hello!

**Joseph
Aphinyanaphongs**

.....
Sr Manager of Trends &
Innovation
Mars PetCare



Nik Pearmine

.....
Chief Strategy Officer
Black Swan Data



The Role of **Social Data** in Innovation

Survey Result

1

How often do you exercise?

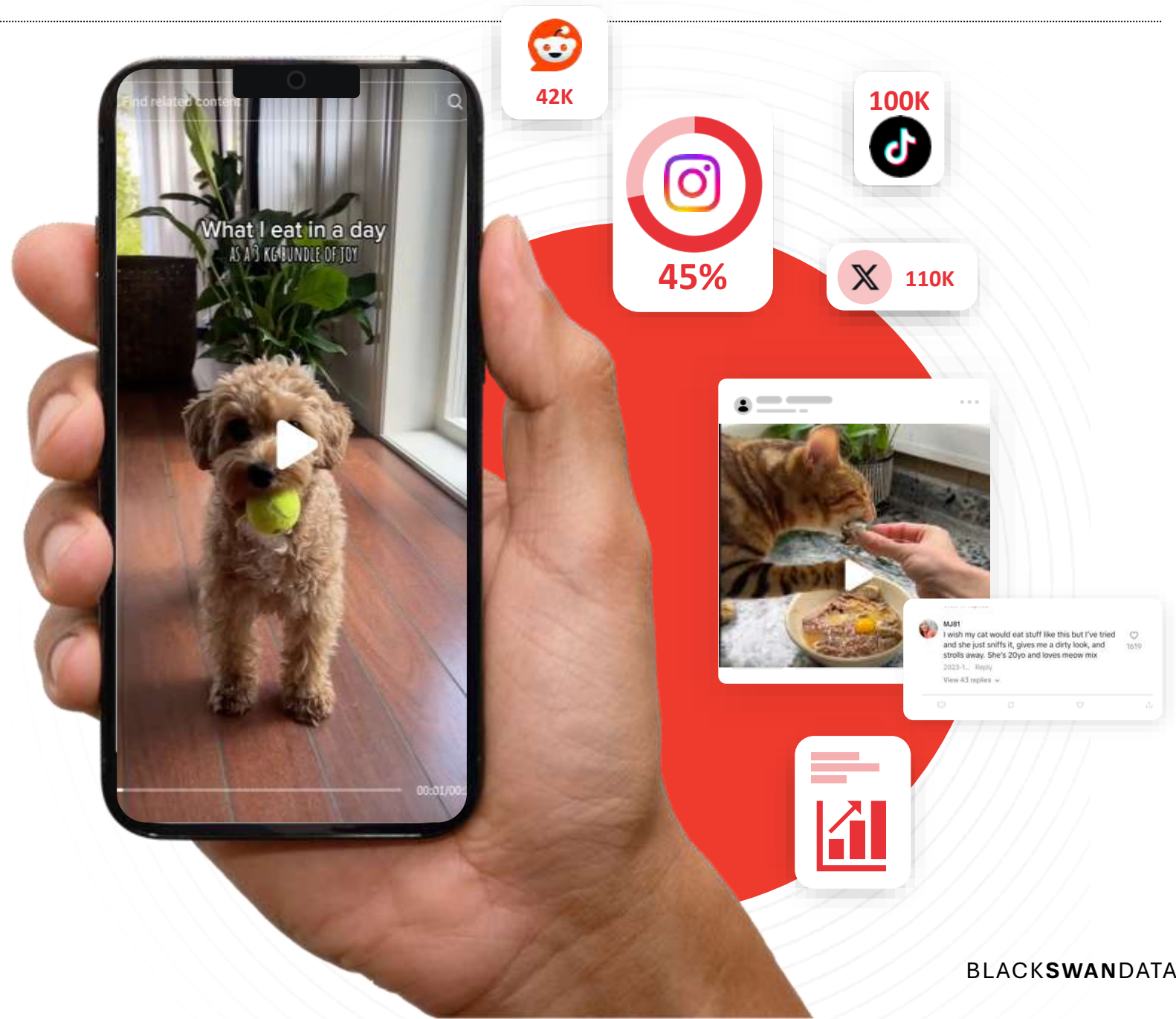
- ☐ Every few months
- ☐ Every week
- ☐ Twice a week
- ☒ Every day



Reality



The world's
largest,
impromptu
focus group at
your fingertips



We are Black Swan Data

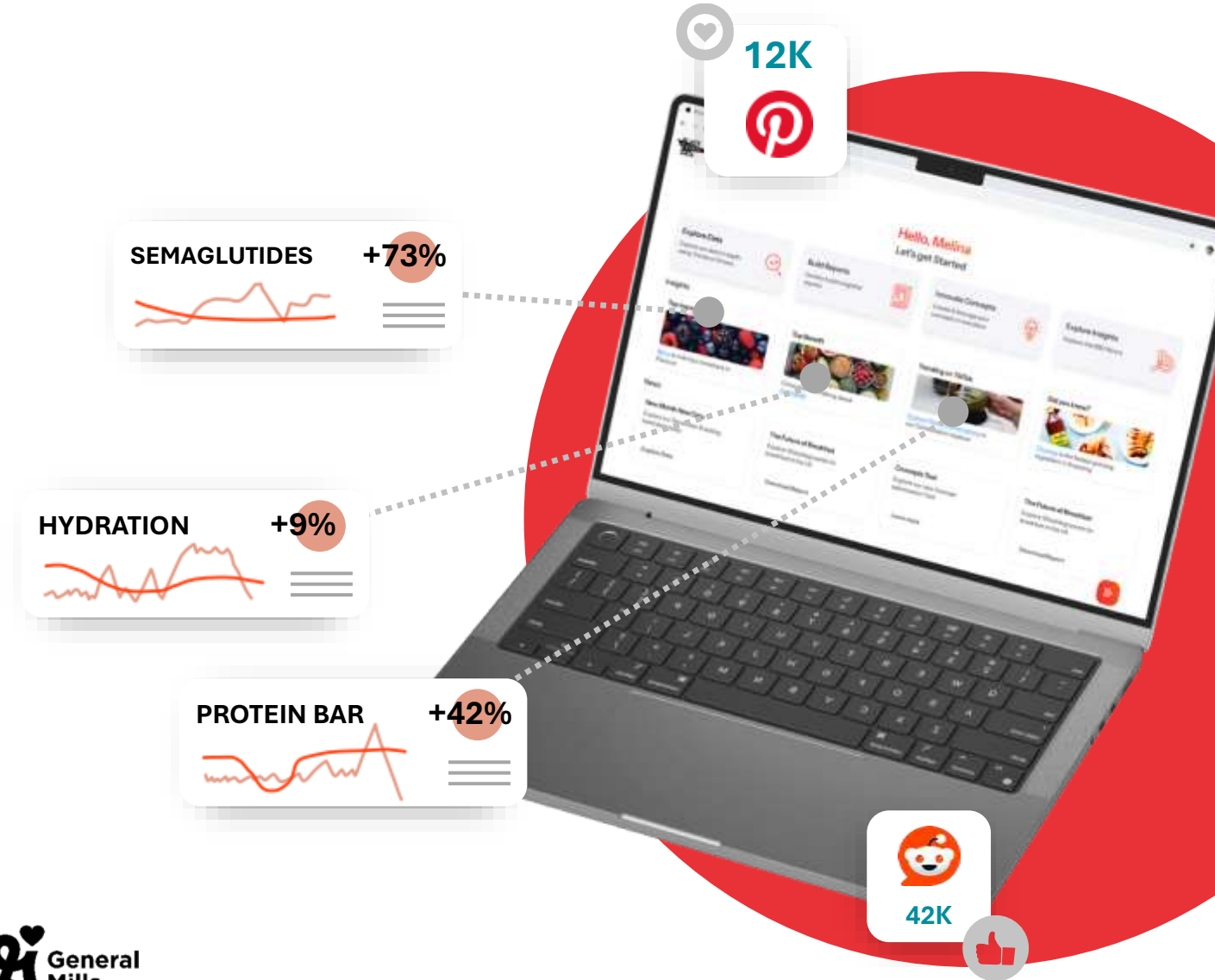
We apply AI and predictive analytics to
online data to:

...**surface** emerging consumer behavior

...**determine** how to action and execute consistently

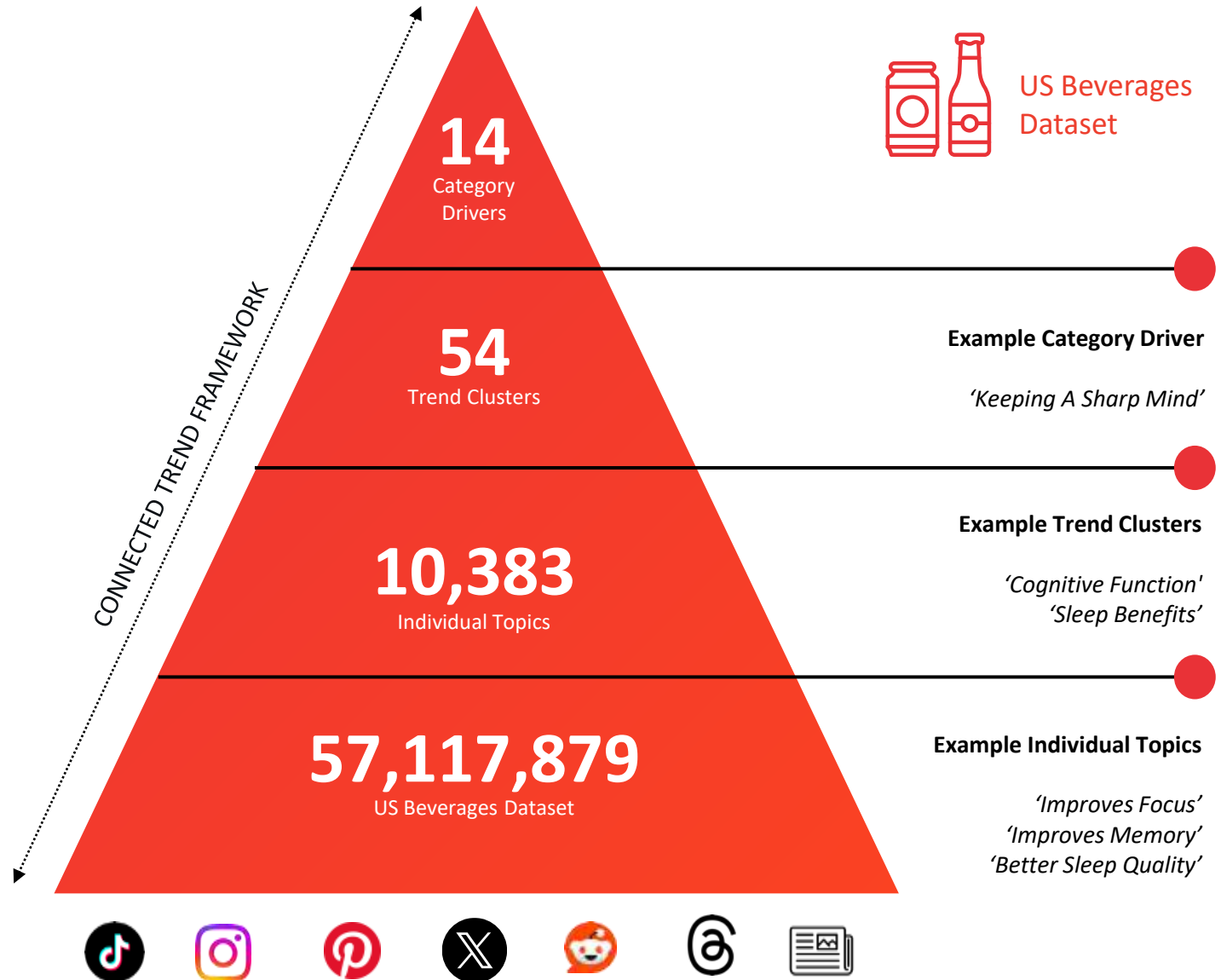
...**prioritize** growth opportunities to target, and why

It helps our customers innovate at speed, with more
precision and confidence.

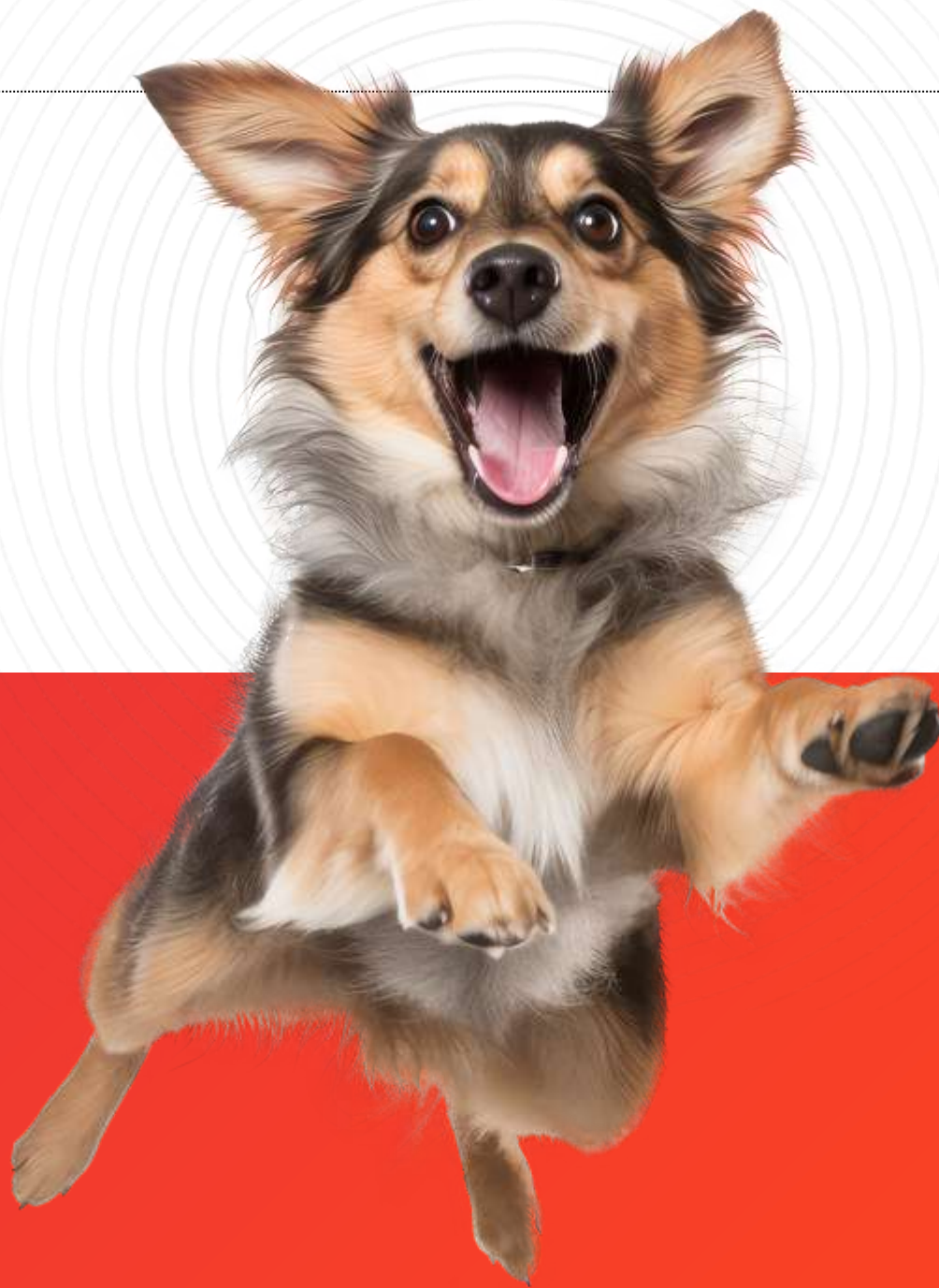


Black Swan's approach to understanding **consumer behaviour**

57,117,879
US Beverages
Data set



First Mover VS. **Leap** **Frogging Fast Follower**



Exploring Innovation Opportunities in the **Fresh** Category

1

Understanding the key
needs in Fresh



2

Unpacking consumer
Pain points



3

Exploring strategic
innovation opportunities



How are consumers talking about **Fresh**?

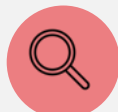
Consumers are drawn to Fresh foods because they believe the use of slow-cooked, high-quality ingredients enhances nutritional value.

However, due to the high cost of Fresh feeding, many consumers opt to use Fresh or raw food as toppers.

Consumer Verbatim Around Fresh



Preservative-Free



Recognizable Ingredients



Human-Grade



Real and Natural



12,464
Conversation Volume
+19%
Conversation Growth

Brand equity shows **Fresh** brands relative strengths & weaknesses

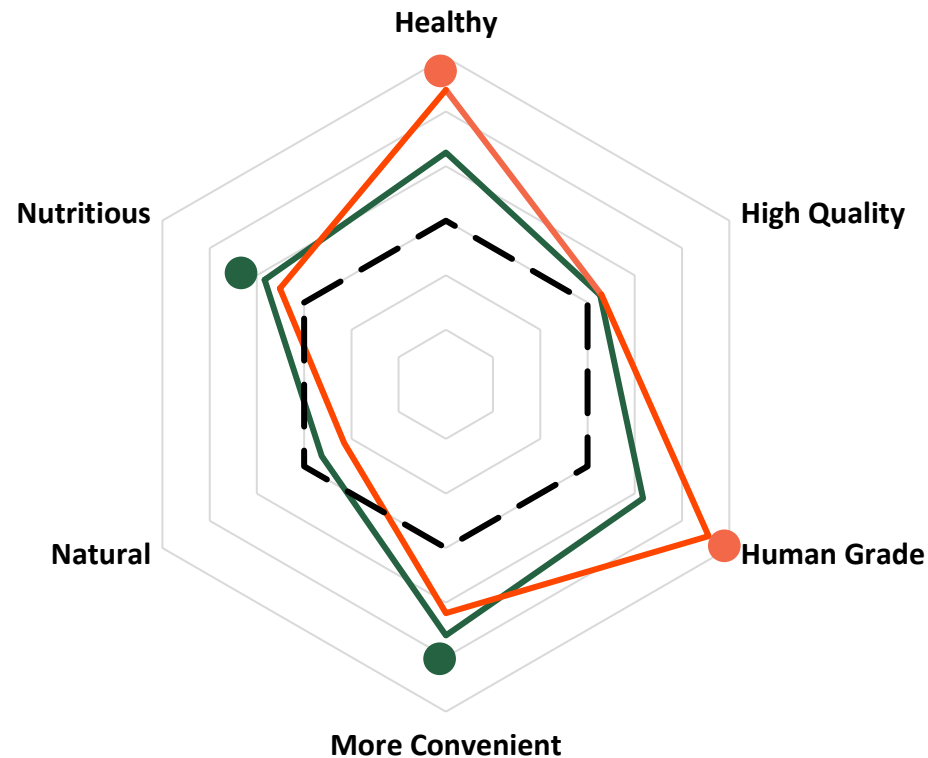


POSITIVE BRAND EQUITY

- ✓ Human grade ingredients
- ✓ High-quality standard
- ✓ Healthier

NEGATIVE BRAND EQUITY

- ✗ High cost
- ✗ High in fat
- ✗ Delivery challenges



Brand Average



POSITIVE BRAND EQUITY

- ✓ High nutritious
- ✓ Convenience
- ✓ Versatility

NEGATIVE BRAND EQUITY

- ✗ Spoilage
- ✗ Storage issues
- ✗ Unpleasant odor

Drivers and pain points of **Fresh** today to leverage in innovation

KEY DRIVERS OF WHY CONSUMERS CHOOSE (AND LOVE) FRESH TODAY:



HIGH-QUALITY WITH NO ADDED NASTIES



HEALTH BENEFITS



CUSTOMIZATION



PALATABILITY



SIGNIFICANT BARRIERS AND PAIN POINTS OF FRESH TODAY:



HIGH FAT AND MULTIPLE MEAT PROTEIN SOURCES



NUTRITIONALLY INCOMPLETE



STORAGE OF REFRIGERATED & FROZEN FRESH OFFERINGS



HIGH COST WITH FEEDING FRESH



Consumers
language and articulation of
the benefits that
sit beneath the
needs **Fresh**
serves today



FOOD SENSITIVITIES & INTOLERANCES

26% SOV | +24% Conversation Growth

Food Allergies | Food Intolerances | Grain-Free



VITALITY

10% SOV | +82% Conversation Growth

General Well-Being | Live A Longer Life | Improves Quality of Life | Increases Energy Levels | Healthy Aging | Boosts Vitality



HEALTHY AGING
Improves Quality of Life | Increases Energy Levels | Healthy Aging | Boosts Vitality

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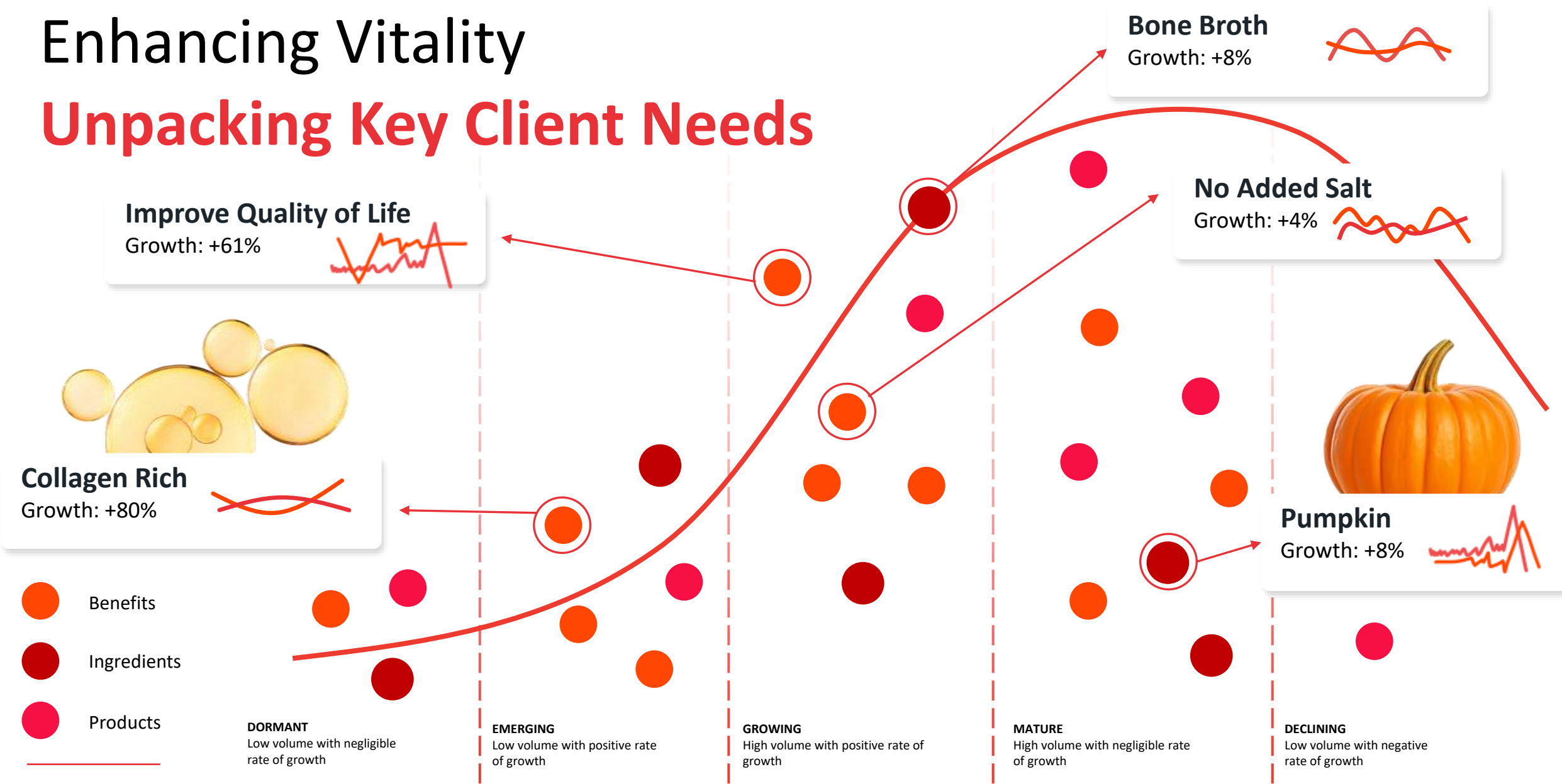


HEALTHY AGING
Improves Quality of Life | Increases Energy Levels | Healthy Aging | Boosts Vitality

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Improves Quality of Life | Increases Energy Levels | Healthy Aging | Boosts Vitality

Enhancing Vitality

Unpacking Key Client Needs



Fresh as a convenient, foundational multi-benefit solution

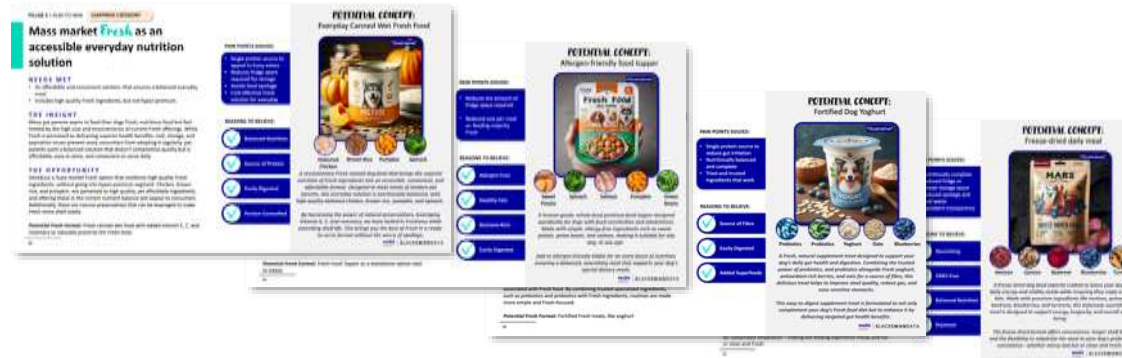
PAIN POINTS SOLVED

- ✓ REDUCES THE AMOUNT OF FRIDGE SPACE REQUIRED
- ✓ NUTRITIONALLY COMPLETE
- ✓ CONVENIENT FEEDING
- ✓ REDUCES FOOD SPOILAGE
- ✓ SINGLE, HEALTHY-FAT PROTEIN SOURCE

REASONS TO BELIEVE

- ✓ COLLAGEN-RICH
- ✓ NO ADDED SALT
- ✓ SOURCE OF PROTEIN
- ✓ HYDRATING

6X Innovation Springboards:



POTENTIAL CONCEPT Everyday Bone Broth



Bone Broth



Carrots



Spinach



Pumpkin

Bone broth with added vegetables is a nutrient-dense, Fresh liquid meal enhancer designed to support dog health. Made from slow-cooked bone broth and Fresh vegetables like carrots, spinach, and pumpkin, to provide a well-balanced and nourishing source of hydration, protein, and essential vitamins.

BLACKSWANDATA

Fuel your innovation programs with the power of AI-driven trend predictions

1

Category Futures



Understand the landscape, the opportunities, their size and how to move on them

2

Demand Space or Opportunity Deep-Dive



Analyze the JTBD in your demand spaces, their trajectory, the relevant opportunities for your brand and how to activate them

3

Flavor & Ingredient Mapping



Pinpoint the flavor and ingredient trends to focus on for innovation

4

Ideation & Concept Generation



Use Gen AI to generate and optimize all the elements for winning product ideas

5

Claims & Positioning



Create more powerful claims and marketing campaigns

WHERE TO PLAY

Data-driven confidence at every stage

HOW TO WIN

Driving Measurable Impact



1

Reduce
Wasted
Research Spend



2

Increase
Speed to
Market



3

Improve
Research Results



4

Increase
Consumer
Centricity



Thank you!

Come by booth
#316 to see our
innovation platform in
action!

