

Highlight.™

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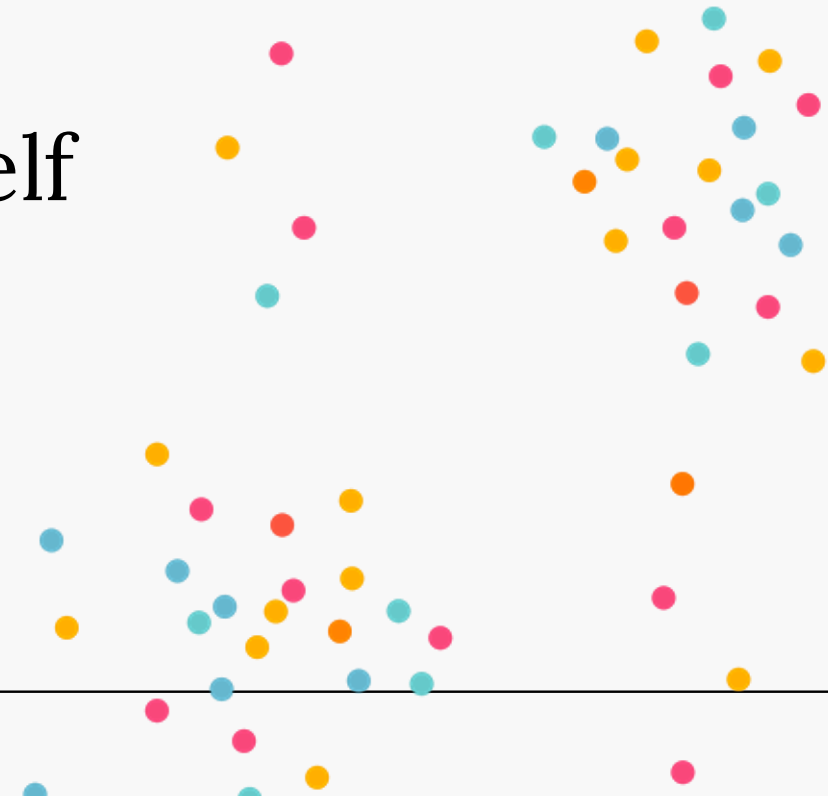


THE J.M. SMUCKER Co

The House Always Wins:

Why the environment changes
sentiment more than the product itself

April 15th, 2026



01

**Speaker
Introductions**

Introductions

Kevin Lubin

Strategic Account Director, Highlight



Drew Ziegler

Scientist, R&D – Frozen Handheld & Spreads
The J.M. Smucker Company



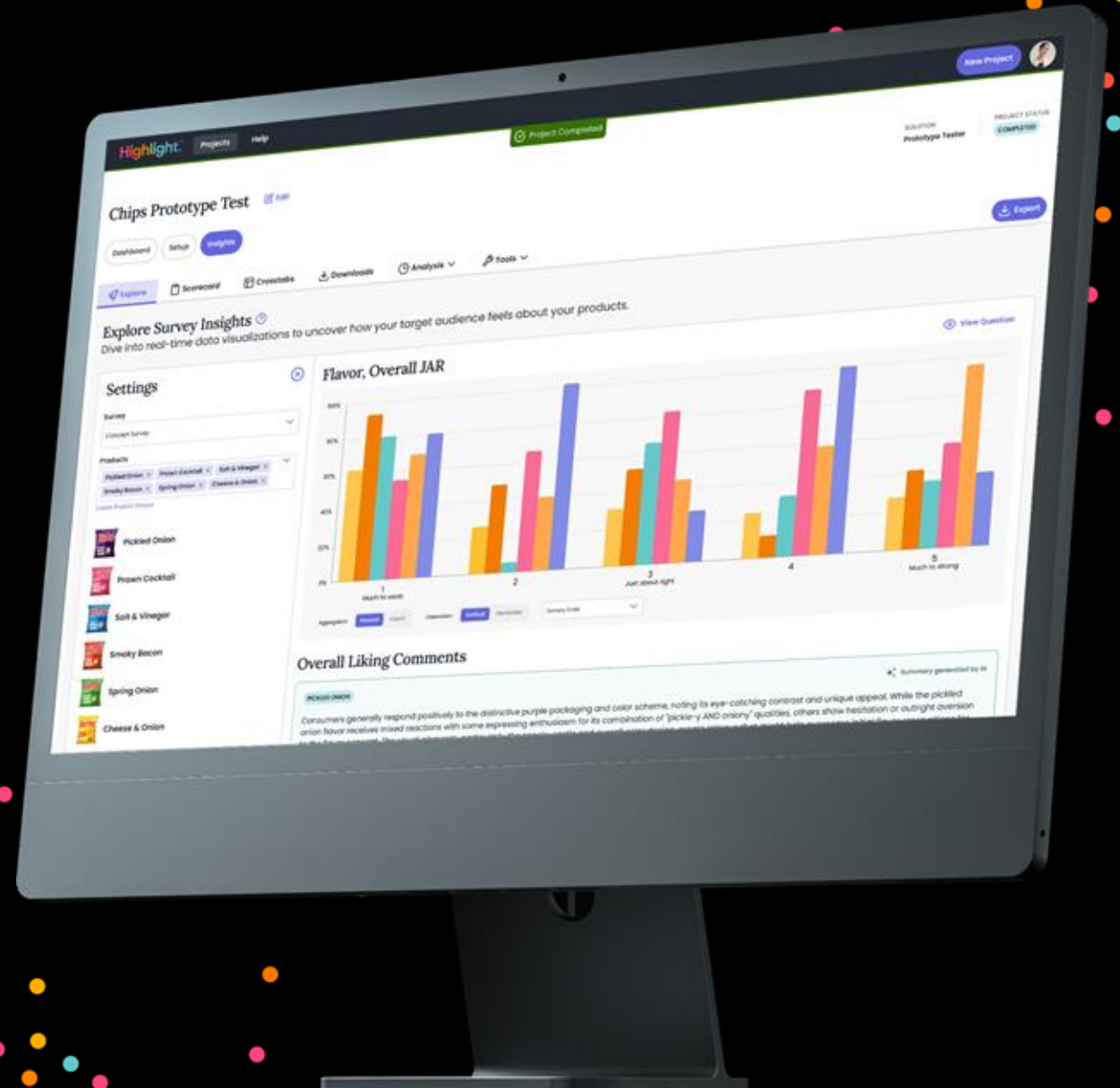
02

**About the
Brands**

Highlight.™

The first and only end-to-end product intelligence platform

- ✓ Purpose-built for **physical products**.
- ✓ Designed for **quality** and **speed**.
- ✓ Powered by **Highlight AI™**.



Our end-to-end, Highlight AI powered platform is built for speed & quality

Easy, intuitive, comprehensive research setup

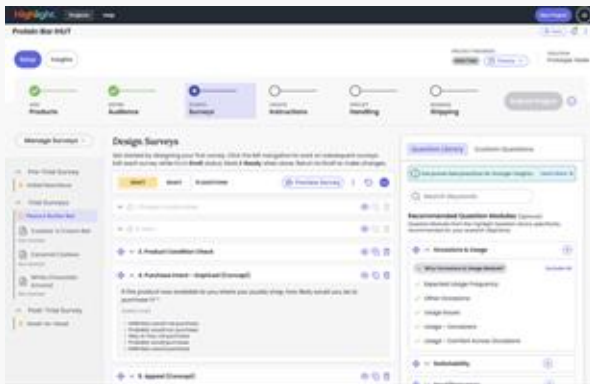
- AI-powered survey blueprints
- Expert-designed protocols
- Turnkey research execution

Access trusted testers & seamless fielding with built-in safeguards

- Access our vetted & purpose-built community (or bring your own!)
 - 90% completion rates
 - 20 word open-ended responses
- AI quality check tooling
- Seamless fielding & logistics management on platform

Unlock powerful, decision-ready insights & analytics (fast)

- Live dashboards with segment filters, side-by-side product analysis
- Instant, AI-powered, presentation-ready reports
- Reports purpose-built for product success – with penalty analyses, statistically tested scorecards, alienation impact, and more



Meet the Highlight Team

Say hello to the Highlight team at **booth 108!** A select number of visitors to our booth will receive a special giveaway prize, courtesy of J.M. Smucker!

John Eigenbrood

Sr. Account Executive, Enterprise



Kenny Wilson

Manager, Commercial Sales



Ilse Mehus

Sr. Customer Enablement Manager





THE J.M. SMUCKER Co

FORTUNE
500
COMPANY

\$8.7B
NET SALES IN FY25

A RICH CULTURE
WITH NEARLY
8,000
Talented & Experienced
Employees



Our
PURPOSE

Feeding Connections
that Help Us Thrive –
Life Tastes Better
Together

A portfolio of leading
BRANDS
Over 84% of Households
Buy Our Brands

5 Generations of
Smucker Family
Leadership

03

Why Are We Here?

Innovation failure is costly

30,000

new CPG products launch each year.

85%

fail within the first 2 years.

\$\$\$

millions are lost due to poor products, positioning, packaging, or price points.

In a competitive market, getting it right matters more than ever.

Winning can't be left to chance.

Products are tested in labs.
But they live in **real life.**



So how do you know if
your product **actually**
wins in the real world?

04

The S.N.O.W. Framework

The S.N.O.W. Framework

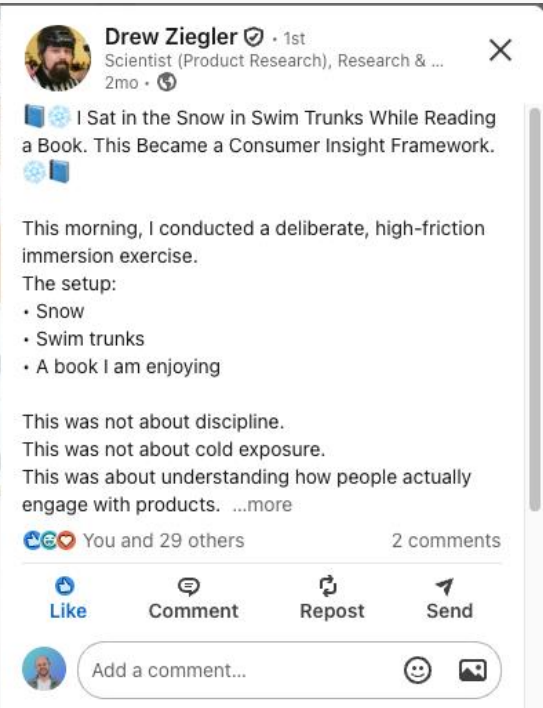
Why the environment around a product shapes its perceived experience just as much as the product itself

Situational Friction

Narrowing Priorities

Objective Collapse

Willingness Threshold



Real life is never neutral – products don't get a clean stage

CLTs eliminate real-world “noise” – great for isolating variables, but consumers go home to chaos

S

**Situational
Friction**

- Kids, pets, fatigue, and packed schedules mean packaging frustrates, instructions get skipped or “hacked”
- In-home research captures what a product can survive, not just what it can do
- In a CLT you control how the product is shown and tested. At home, people experience it however their environment lets them.
- Uncrustables say ‘do not microwave’ on the box – yet there’s are debates online on the best way to microwave them.

As stress rises, optional benefits disappear

People simplify decisions rapidly when tired, rushed, or overwhelmed

CLT / Focus Group

“I can see this being a great mid-afternoon snack to keep me going until I get home.”

“My kid would love this – a quick lunch when we’re running errands.”

Hypothetical – focused on concept appeal

In-Home Usage Test

“It was good, but I was still hungry and grabbed another one.”

“My kid ate it, but the mess – I should have packed an extra change of clothes.”

Real – reveals unmet needs and repeat-purchase barriers

N

**Narrowing
Priorities**

Intent at the shelf doesn't survive contact with reality

Reality in the moment renegotiates even the best intentions



**Objective
Collapse**

- Everyone wants to eat the salad. Most nights, it's the frozen bag meal – and the salad “definitely gets made tomorrow”
- People adapt in the moment because of time constraints, motivation, and situational context
- In-home research catches where aspirational intent breaks down – and what the product actually competes against

Every product has a breaking point

CLTs artificially minimize effort and artificially inflate motivation

The Spoon Theory

You only have so many “spoons” of energy each day. Wake up tired? Lose 2. Back to back meetings all day? Lose 7. By evening, you’re running on empty.

The laundry waits another day. The floor goes unmopped. And that new product? It goes from “acceptable” to “annoying” real fast.

- Prep time, physical steps, mental load, and clean-up all drain willingness
- Even motivated research panelists hit breaking points – real buyers have even less patience
- In-home tests reveal the exact point at which a product tips from acceptable to abandoned

W

**Willingness
Threshold**

CLTs and Real Life

In the CLT

Instructions are followed precisely for prep to give optimal experiences to understand how the product preforms

Result: Positive scores. And some areas of improvements

In the Home

Consumers ignored written instructions and defaulted to what's they know or what's easiest for them..

Result: The product experience in-home was negative or more variable not because of the product but because of the wide variety of how they prepped it.



After a product is launched socials start to show popularity of unexpected "hacks" that we dismissed as trendy.

Solidifies need to understand how to overcome habit change barriers and there is still research that can be done even after launch

The Instructions Nobody Followed

Product Prepping

A new recipe required staff to prep tomatoes with a new device that would be shipped to each location. In the CLT, the technique worked perfectly because we only had to do the test once.

In real stores? Every single location used whatever knife was available because the device dulled quickly and made it more difficult. Quicker. Easier. Done.

The CLT showed what was possible. Reality showed what actually happened when they ran out of patience.

The Panini Press Problem

A special liner paper was required to keep the press clean. In the CLT: followed to the letter.

In stores: staff skipped never replaced them because it was not an easy swap mid service rush. Then customers complained that the sandwiches looked messy because of the overused liner. Or the press was impossible to clean because they were not using the paper and a full service would be burned on the cleaner.

The problem wasn't the product. It was the gap between test conditions and real behavior.

Key Takeaways

01

Clean data comes from control, but aren't predictive of real world experiences.

Real results come from the mess — countertops, car seats, and lunch rushes.

02

Test in the wild.

In-home exposes the friction, shortcuts, and hacks that a CLT can't surface.

03

Embrace the messy.

Think beyond the “right” way to use a product — explore the imperfect ways people **actually** use it.

05

The Value of In-Home

CLT vs. In-Home: Use Both, But Know What Each Tells You

Central Location Test

- ✓ Isolates the product itself
- ✓ Clean, comparable data
- ✓ Focused consumer attention
- ✗ Can't predict real-world hacks
- ✗ Misses friction, fatigue, competing demands
- ✗ Artificially elevates motivation

In-Home Usage Test

- ✓ Captures real context: kids, chaos, commutes
- ✓ Surfaces hacks, workarounds, and unmet needs
- ✓ Reveals repeat-purchase and adoption barriers
- ✗ Less controlled; more variables
- ✗ Requires more logistics and time

What to Do Next: Design for the Real World

1. Run CLTs and in-home tests together — not instead of each other.

Use CLTs to perfect the product. Use in-home to validate it survives in real life.

2. Ask about real moments, not ideal ones.

Design tasks around actual usage occasions: the rushed morning, the distracted parent, the depleted evening.

3. Let consumers surprise you.

The most valuable insight isn't what you planned to learn. It's the air-fryer hack, the skipped step, the workaround you never anticipated.

Highlight

**powers in-home
research at scale.**

The first and only vertically-integrated product intelligence platform — owning community, logistics, and insights from end to end.

- -Frozen, refrigerated, blinded product shipping
- -Proprietary, engaged consumer community
- -Insights delivered in ~3 weeks from product shipped

Why J.M. Smucker partners with Highlight

Across teams and product verticals—including Frozen Handheld & Spreads, Coffee, and Pet Food —JMS needs to understand how consumers actually use products at home.

In-home testing through Highlight provides the context that CLTs can't — the messy, real, behavior-driven truth about whether a product truly fits into consumers' lives.

06

Q&A



Raise your hand and a Highlight staffer will bring you a microphone.

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Head to **booth 108** to learn more about Highlight.

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Thank you!