

The world we want tomorrow starts with how we do business today

MARS



The Five Principles

Quality Responsibility Integrity Efficiency Freedom

130,000+ Associates

are united and guided by The Five Principles of Mars which span geographies, languages, cultures and generations.



1911

Frank C. Mars made the first Mars candies in his Tacoma, Wash., kitchen

80+

countries in operation



Global HQ in McLean, Va.

FORTUNE

Great Place To Work.

World's Best Workplaces



Private, family-owned company



\$40B
NET SALES



454

SITES

2,500+

VETERINARY HOSPITALS



Billion Dollar Brands



MARS
Petcare

A Better World For Pets



MARS WRIGLEY

better moments make the world smile



MARS
Food



MARS
Edge

Better Lives Through Nutrition





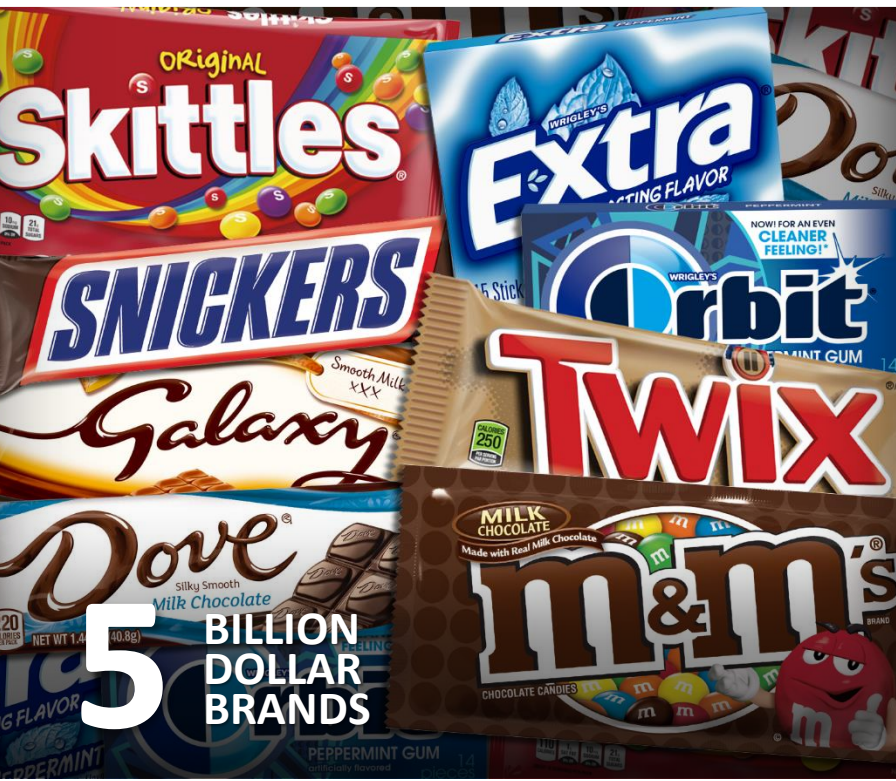
MARS WRIGLEY



MARS WRIGLEY

53
FACTORIES

180
COUNTRIES



34K ASSOCIATES WORLDWIDE

#6 GREAT PLACE TO WORK

better
moments
make the world
smile

MARS WRIGLEY



radius

Setting You Up for Success With Voice

Next 2021



Agenda

- Where and how Voice is being used today
- How Voice Commerce & Voice Technology may be used to enhance shopping journey
- Best practices for insightful learning



BETSY FITZGIBBONS

Mars Wrigley

Customer & Shopper Insights
Digital Commerce & New Transactions



SHARI AARON

Radius

SVP, Growth &
Innovation



BROOKE FINCK

Radius

VP Client Services &
Senior Insight Strategist



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Mars Inc.

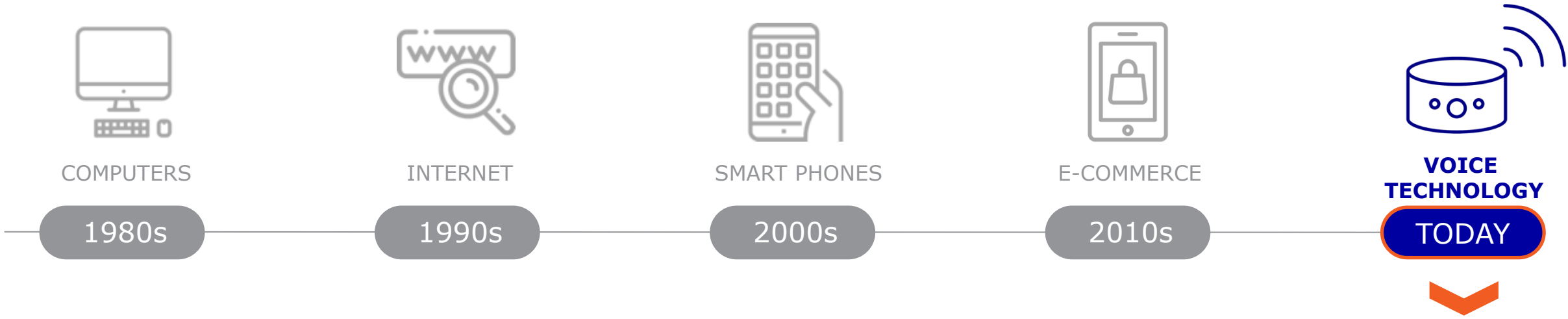
Shopper Insights
Center of Excellence



WHY SHOULD WE CARE ABOUT VOICE TODAY?

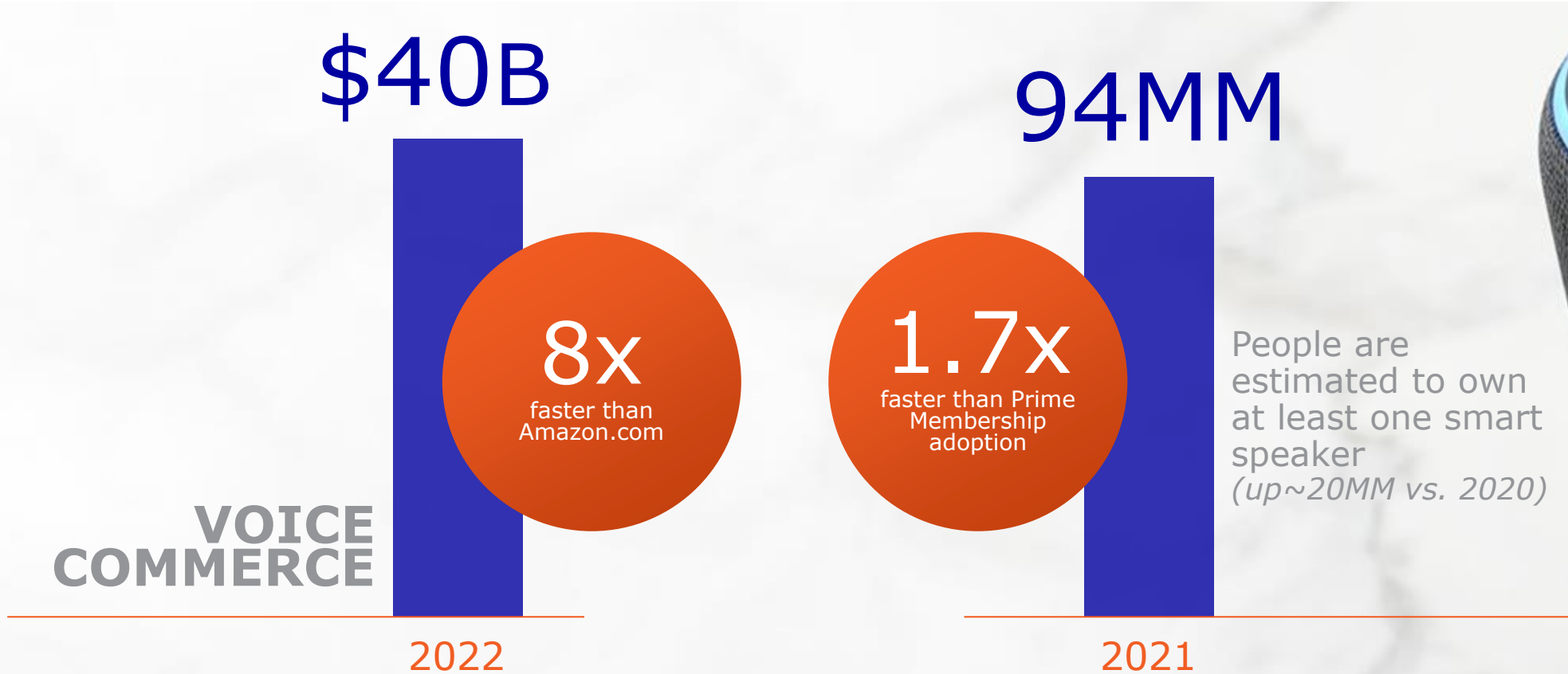
We are currently at the precipice of the next technological pivot

Voice Technology is the next disruption.



Just like the internet did, Voice Technology elevates ease and convenience to a new level.

Growth in Voice is set to outpace the rise of Amazon...



...AND 17% of Alexa users are already adding the top 20 grocery items to their carts via Voice

...and big players are investing in Voice



If you don't venture into the Voice game, you will be left behind.



WHAT IS “VOICE” AND WHY IS IT SUCH A BIG DEAL?

The power of Voice sits at the intersection of 3 rapidly-evolving technologies

1
Artificial intelligence
Algorithms that learn, do tasks, and make recommendations based on your behavior



Apple's Siri Microsoft's Cortana Google's Assistant Amazon's Alexa

2
Smart device
Physical things we interact with



3
Voice recognition technology
Ability to recognize and decipher speech and speak back



Voice Technology is **INNATE**

We naturally use our voices in everyday life to...



...express our *needs, desires, and preferences*



...express our *identities, beliefs, and values*



...both *give* and *gain understanding*



...both *raise* and *reconcile tensions*

Voice Tech taps directly into those very drivers—it is a powerful extension of a behavior that **nearly everyone everywhere does each and every day.**

It's everywhere, always with us, always on, integrated, & growing

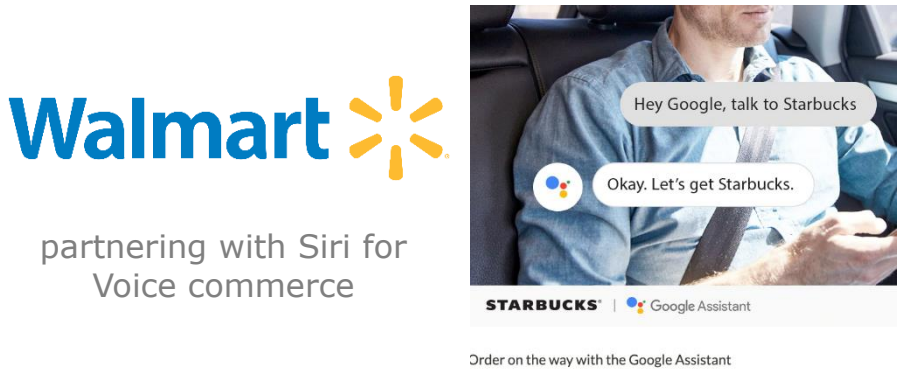
AT HOME



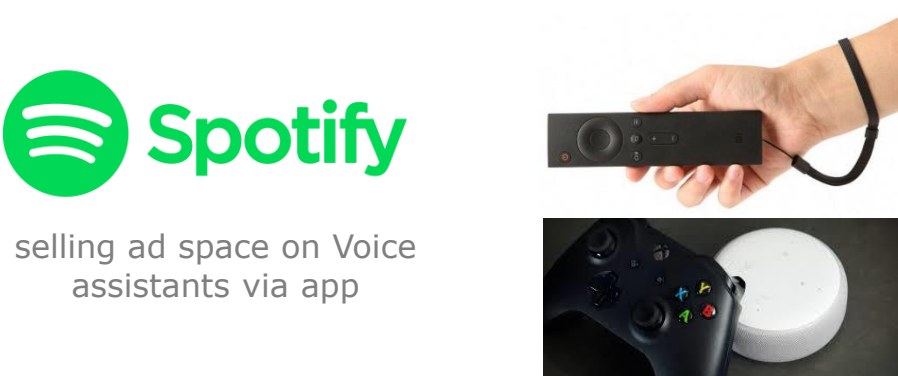
ON THE GO



WITH & AT RETAIL



FUN & ENTERTAINMENT



Consumers look to Voice to deliver on **five key needs**:



KNOWLEDGE

Answering questions
when and where
you need



PRODUCTIVITY

Doing more
with your time



ENTERTAINMENT

Being engaged and
delighted



UTILITY

Being in control of
your devices and
environment



COMMERCE

Making shopping
even more
accessible

Particularly in situations with logistical constraints



When you are
multi-tasking
and can't easily use a screen
or keyboard to type

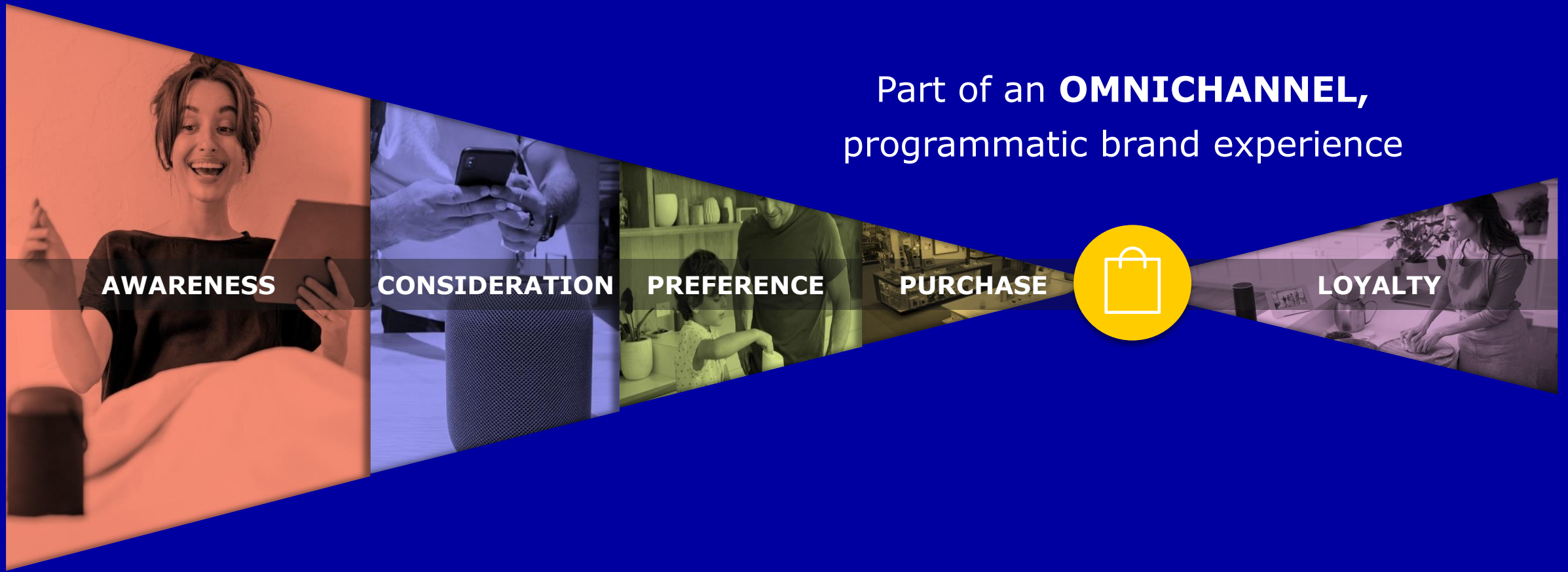


When you need to be
hands-free
and can't be engaging
via touch and sight



When it's
spur of the moment
and you don't want to forget a
question, product or reminder

Voice delivers on different phases of a consumer/shopper journey and plays part in an Omnichannel strategy



Specifically, Voice can be used as a lever to drive a range of business objectives

AWARENESS

Connecting to brand by answering questions asked via Voice or connecting to other Voice contexts



Michelob Ultra created a series of FAQs related to running that answered the question being asked and reminded the consumer to enjoy a Michelob Ultra after their workout.

CONSIDERATION

Voice Recommendation for product search

QUIP



QUIP partnered with a top news publisher to integrate a coupon code and drive reach through a relevant morning routine – brushing teeth while listening to the news.

PREFERENCE

Allow for in-the-moment purchasing

COUNTRYCROCK allrecipes!



Country Crock bought media to replace “butter” with “Country Crock” in ingredient lists on Allrecipes which allowed for easy “add to cart” functionality.

ENGAGEMENT

Voice activations or integrations into activations

Crest Oral-B



Crest and Oral-B created a daily podcast to engage kids in the brushing process with music and games to guide kids through the 4 brushing quadrants. Results: 45% of people who downloaded Chompers use it daily.

LOYALTY

Everything from easy reorder to truly integrating into consumers’ lives, drive purchase and emotional loyalty

ZYRTEC



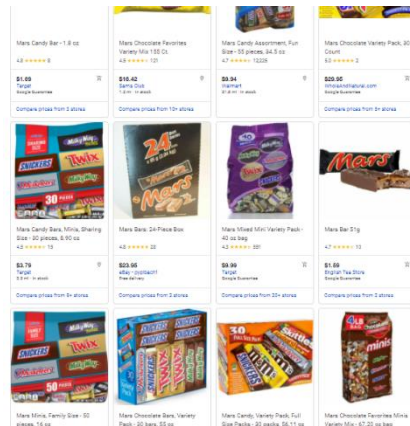
Zyrtec launched an Alexa skill that shares the daily pollen count for the user’s location and by recording a person’s reactions over time can learn and predict which types of pollen users are most sensitive to.

However, **Voice Commerce** requires a new lens as the number of products available through Voice interaction decreases dramatically from instore, online and mobile

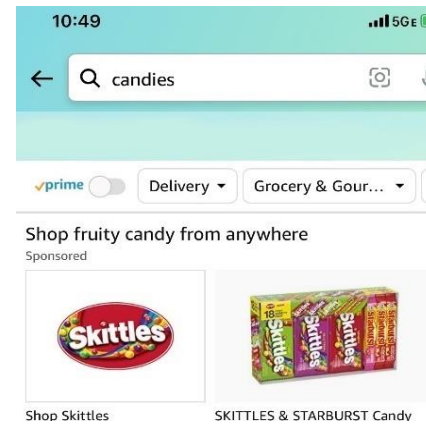
The infinite online shelf is a myth



Physical shelf
200+SKUs



Digital shelf
8+SKUs



Mobile shelf
2+SKUs



Voice assisted shelf
1 SKU

Learning all of this was great, but there were 3 big burning questions:

Q:

How could Mars Wrigley conduct Voice research into, and with, this new high tech Voice device?

How do people shop for Mars Wrigley categories on Voice devices?

What could Mars Wrigley impart to its Customers to get them onboard with Voice Commerce?

A:

**RADIUS TEAM
& RESEARCH**

**PATHS TO
PURCHASE**

**10 RETAILER
"MUST DO'S"**



Helping MW to Understand Their Categories Via Voice Lens

Radius partnered with Mars Wrigley to discover insights to unpack a range of key learning areas to guide Voice strategy, including:

Introduced/Joined Journey	Search & FAQs		Completion
How people are using Voice today ?	How do people search for confectionery categories and brands on Voice?	What confectionery product/brand info are people asking for on Voice (FAQ's)?	How are products ordered and fulfilled ?
How satisfying is this process?	What is working well that Mars Wrigley can learn and build from?	What are current barriers or obstacles in Voice engagement opportunities?	Do people notice cues for Voice across other platforms?

Radius used a creative approach to get us close to the consumer and ensure MW wins in Voice

We spoke with tech savvy category buyers who use a Voice/Smart Speaker device daily.

We observed natural behaviors and gave respondents specific exercises to understand what works and how to improve their experiences

First week – natural usage & voice interactions



Voice/Smart Speaker Habits & Usage Understanding



Capture Voice Interactions in the Moment

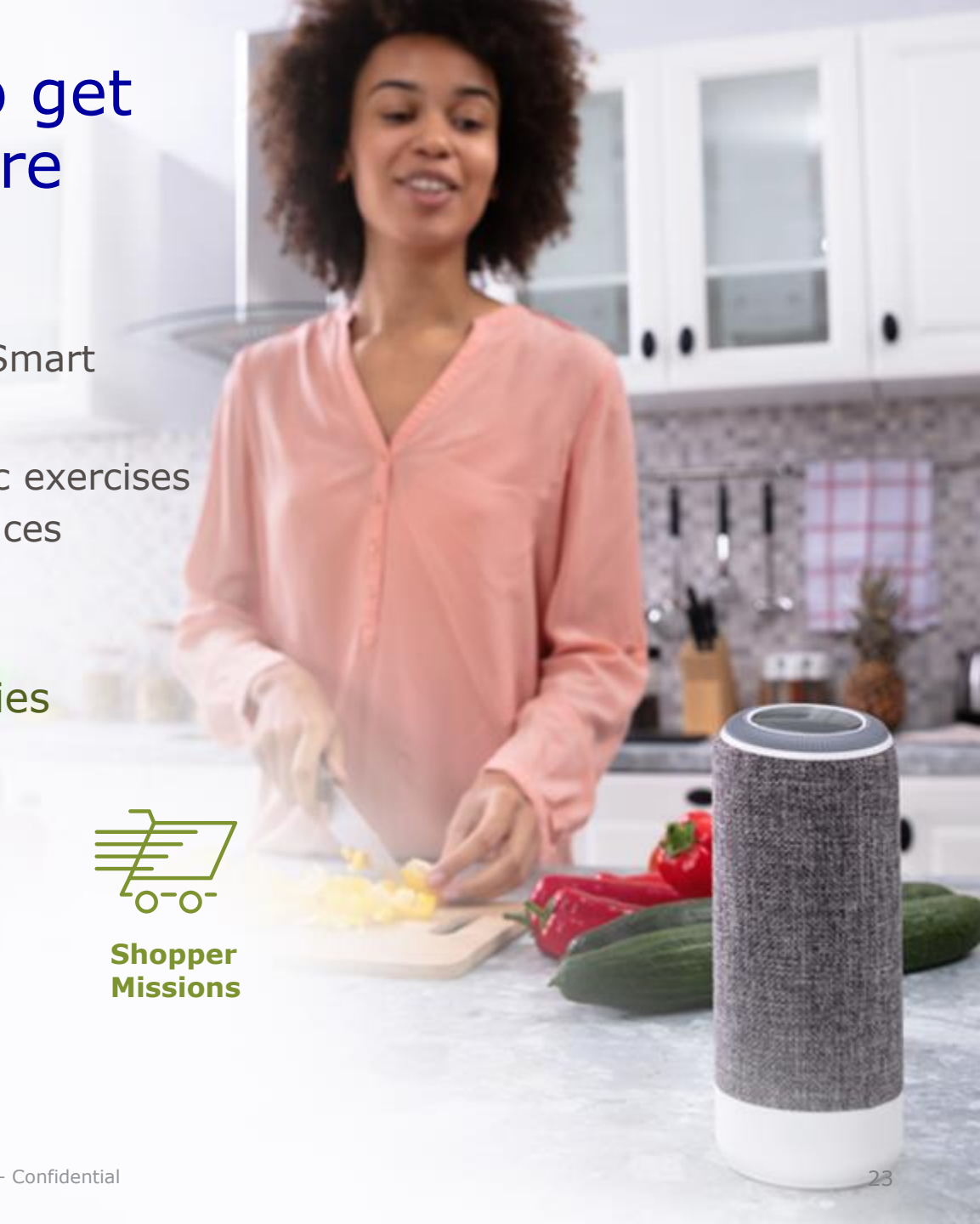
Second week - prompted activities



Understand Product Questions and Engagement via Voice



Shopper Missions





Radius continues to use creative research to drive Voice learning

Radius designed research to learn how consumers evolve and what triggers them to move deeper into Voice

We built a 12-month online panel of tech savvy consumers already shopping regularly via voice and created an ongoing pulse and evolutionary community to understand where the general market is headed and how it will get there.

We showcased how current technology, home devices and new technical innovations are changing consumer behaviors and habits... **as these habits evolve**

Ultimately, we identified gaps, future opportunities for brands and retailers, evolving consumer behavior and what consumers perceive to be relevant and most important to them.



As quickly as Voice is evolving,
so is the consumer.

We continue to evolve our
methodologies – from
traditional to voice focused
research (ConnectLive™)



We built ConnectLive™ to deliver Interactive Voice Engagements

ConnectLive: Closer to an organic, intuitive experience.

- **Facilitates** feedback in the right moments
- **Creates** a more enjoyable and rewarding experience
- **Accessible** standalone or integrated with other research solutions

Voice-activated surveys
fit naturally into every-
day activities



Voice Research Through Smart Speakers



Understand if their Voice Signature or Voice Solutions deliver a consistent brand image



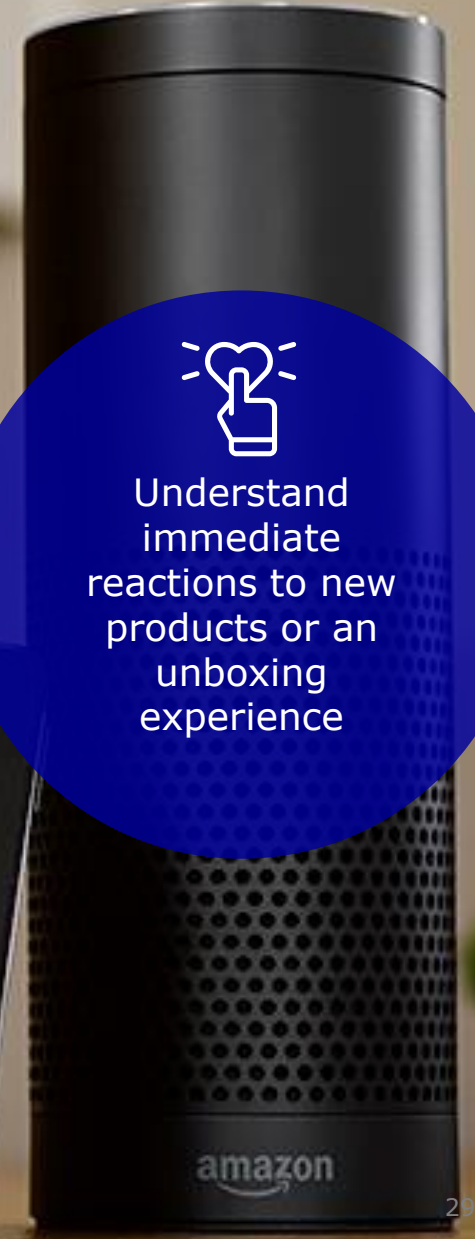
Enhance CX or Satisfaction Studies with immediate feedback



Uncover pain points and new opportunities



Understand immediate reactions to new products or an unboxing experience



Case Studies

Understand natural behaviors; find out what is working today



Evaluate a New Product or Service



Feedback on Content/Campaign



Capture Consumer Behaviors



Uncover the Shopping Journey

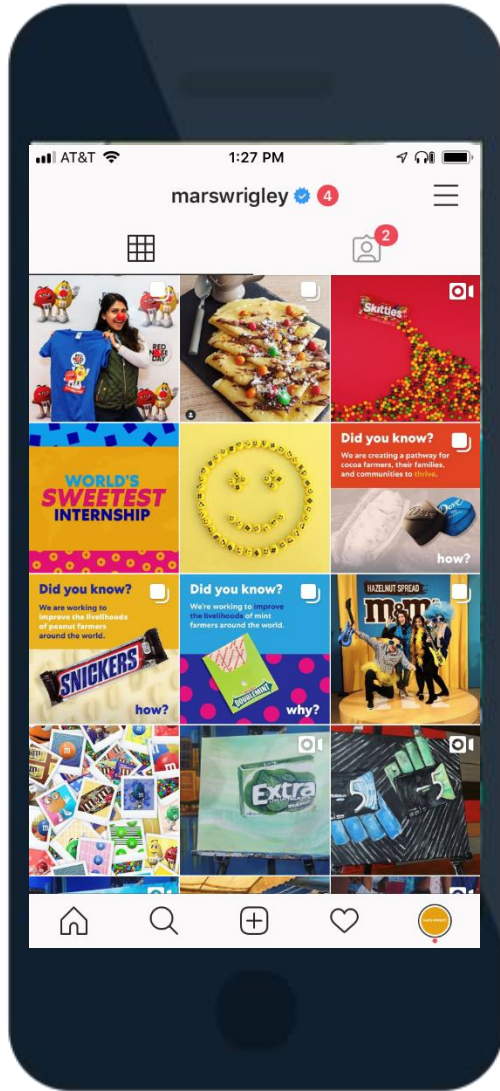


Questions?

MARS WRIGLEY



radius



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 [@marsglobal](https://twitter.com/marsglobal)

 facebook.com/marswrigley

 linkedin.com/company/mars

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