

**‘Attention, this is
your Captain
speaking’**



**‘Retention, this is
your Captain
speaking!’**



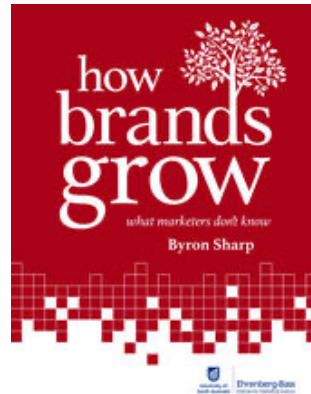
Our story

How COVID challenged our growth model

How we seized the retention opportunity

How if you don't break the rules, the rules will break you

Brand growth is driven by penetration not loyalty



MENTAL AVAILABILITY



PHYSICAL AVAILABILITY

.....it comes down to one thing: AVAILABILITY or attention to our brand assets



Distinctive Assets

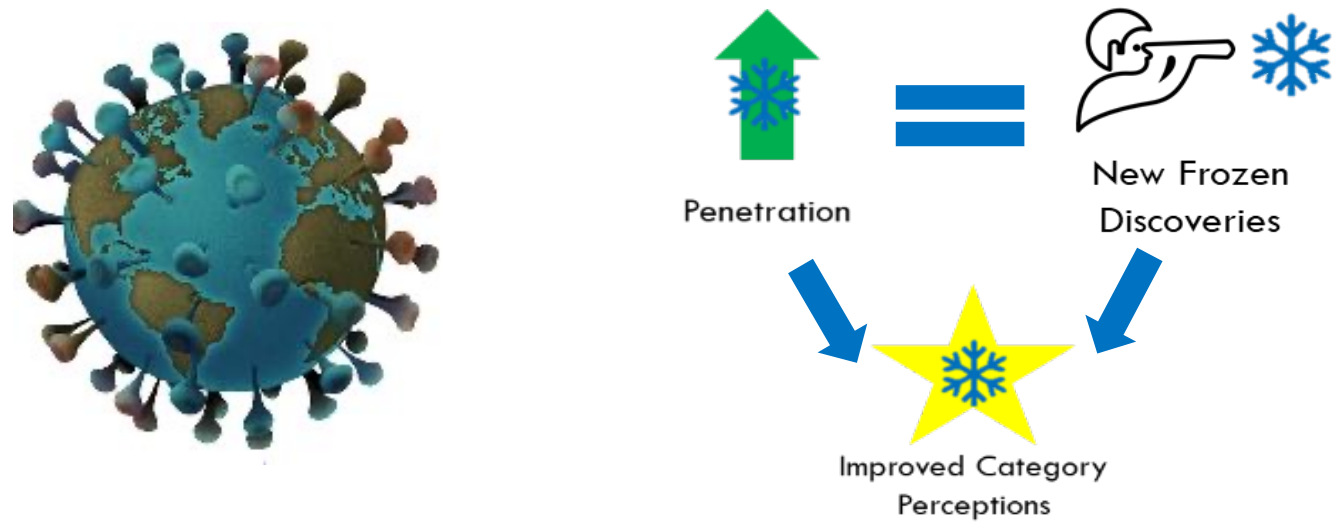


Always On



Be where they buy

February 2020 – What does this mean for how we grow our brands?




New NOMAD
+1.9M Fish shoppers
in Top 5 EU Markets in Q2 2020 vs 2019




Restaurants/cafes/workplaces
closed...



... in-home consumption ...

 **+1.8bn**
Additional in-home UK
meals in April 2020
vs the av month.

...and freezers too

  **+50%**
 **+54%**
%Increase in Freezer sales 2020

An extra 2mn shoppers was opportunity we could not ignore



**Gaining
attention**

**Holding
attention**

We redeployed budget to target existing buyers – at less cost than before to retain



Precision
demographics



Brand engager
lookalikes



Category shopper
behavioural profiling

Research identified two modes of attention

Alice, 35

Our New
buyer



**Shopper
mode**

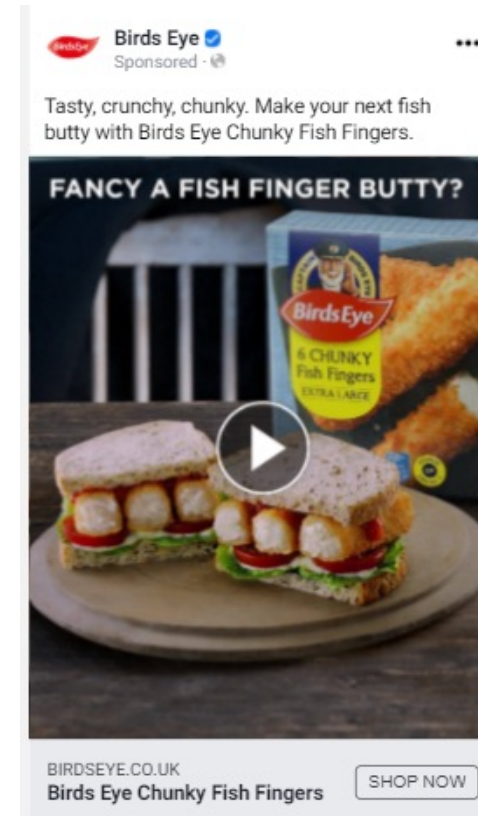
Chiara, 56

Our Lapsed
buyer



**Inspiration
mode**

Reflected in discrete messaging approaches



And channel role tactics

Bumper ads



Pushing products on promo



Shoppable formats



Food channel contextualization

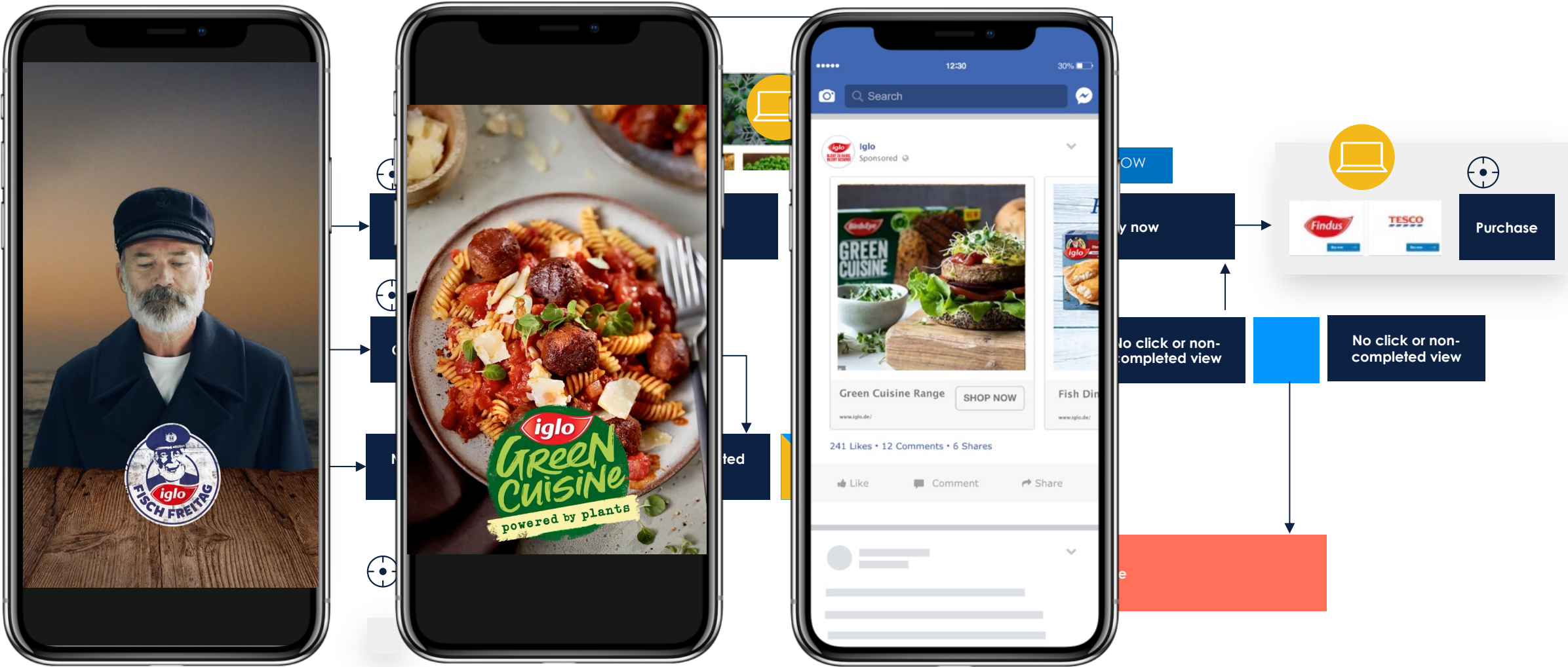
Ambushing fresh product searches

Continuity of recipe-based ideas

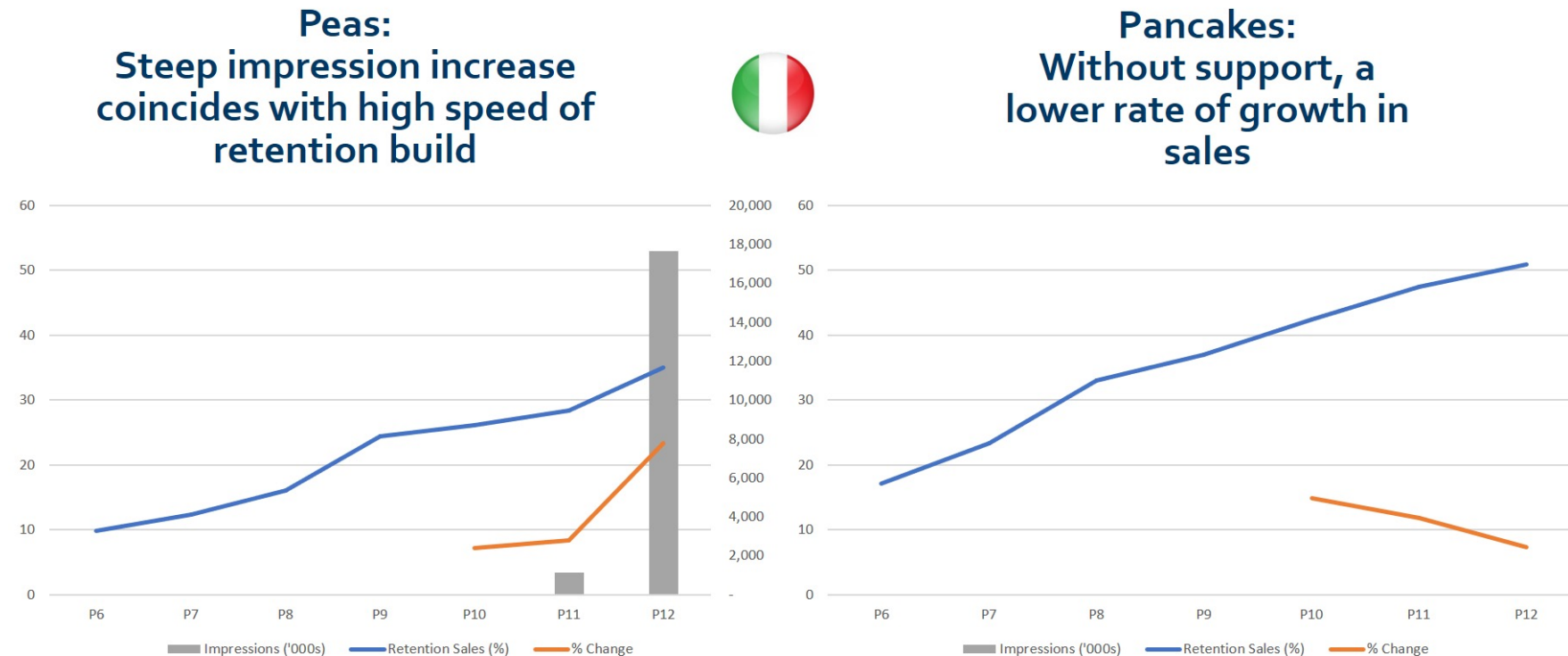
**Shopper
mode**

**Inspiration
mode**

Optimised based on behavioural signals

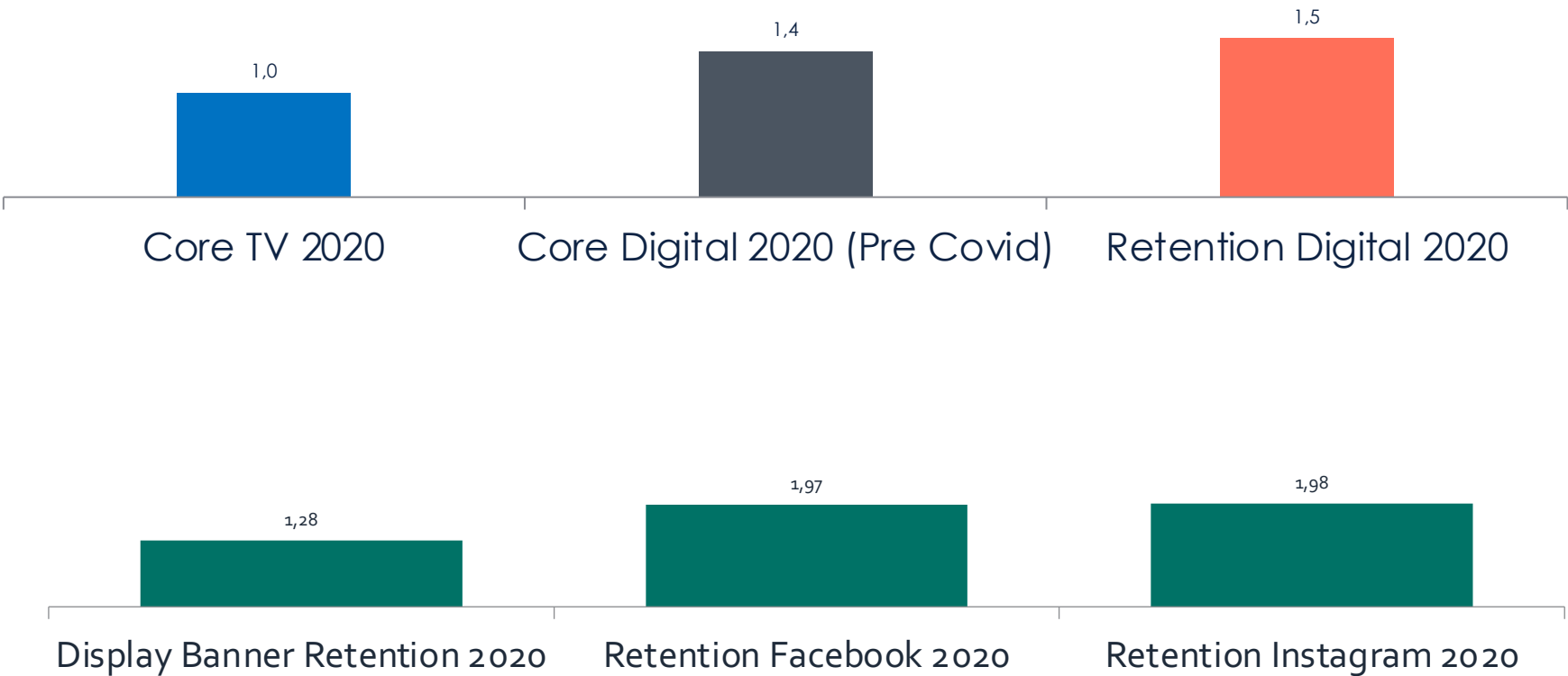


Strong correlations between where we ran retention focused media activity and uplifts in shopper retention

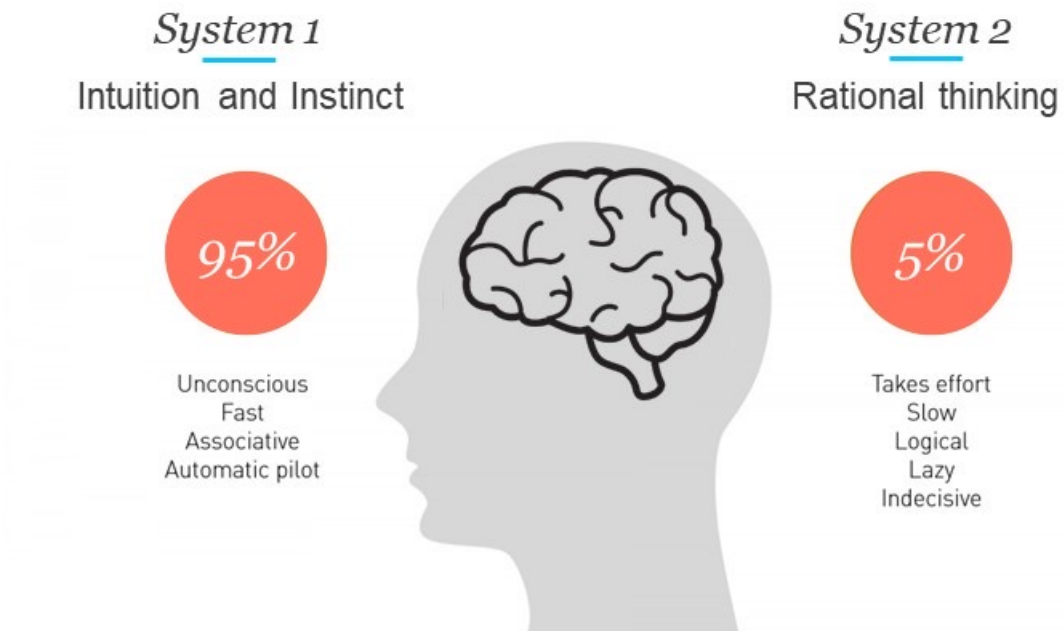


Retention media generated ROI of €1.5 on total sales +50% compare to TV FB and Insta outperforming Display

ROI (€)

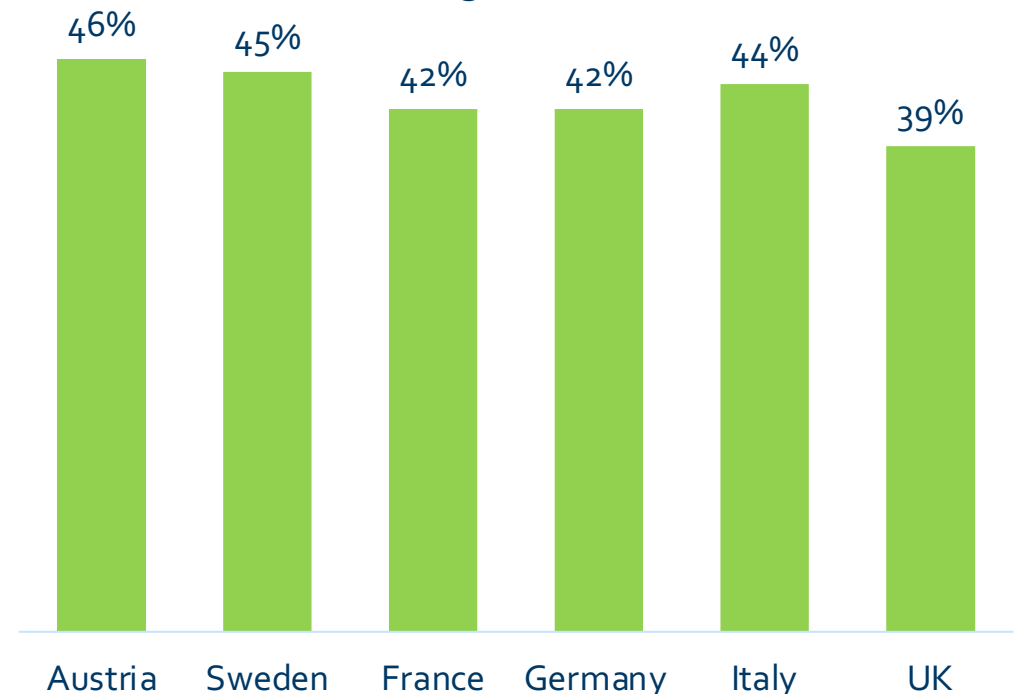


Behavioural Economics tells us changing behaviour is hard – is it really?

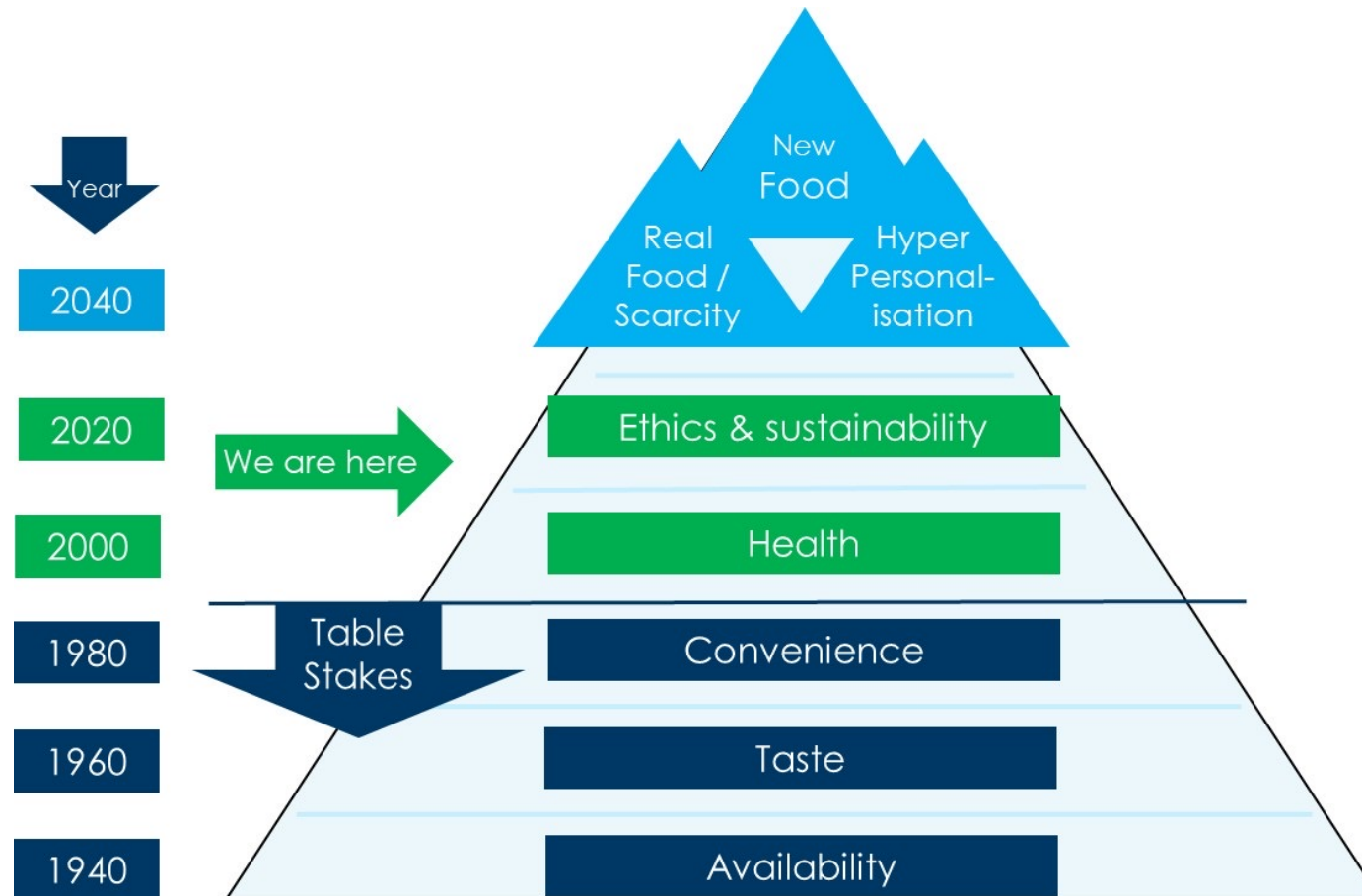


Source: Daniel Kahneman

% of New Buyers that have purchased again Q1 2021.



How people make choices moves slowly apart from times of big change



To Grow with Penetration = Winning at the point of change



From 'Bullseye' Target Audiences



THE POWER OF HABIT

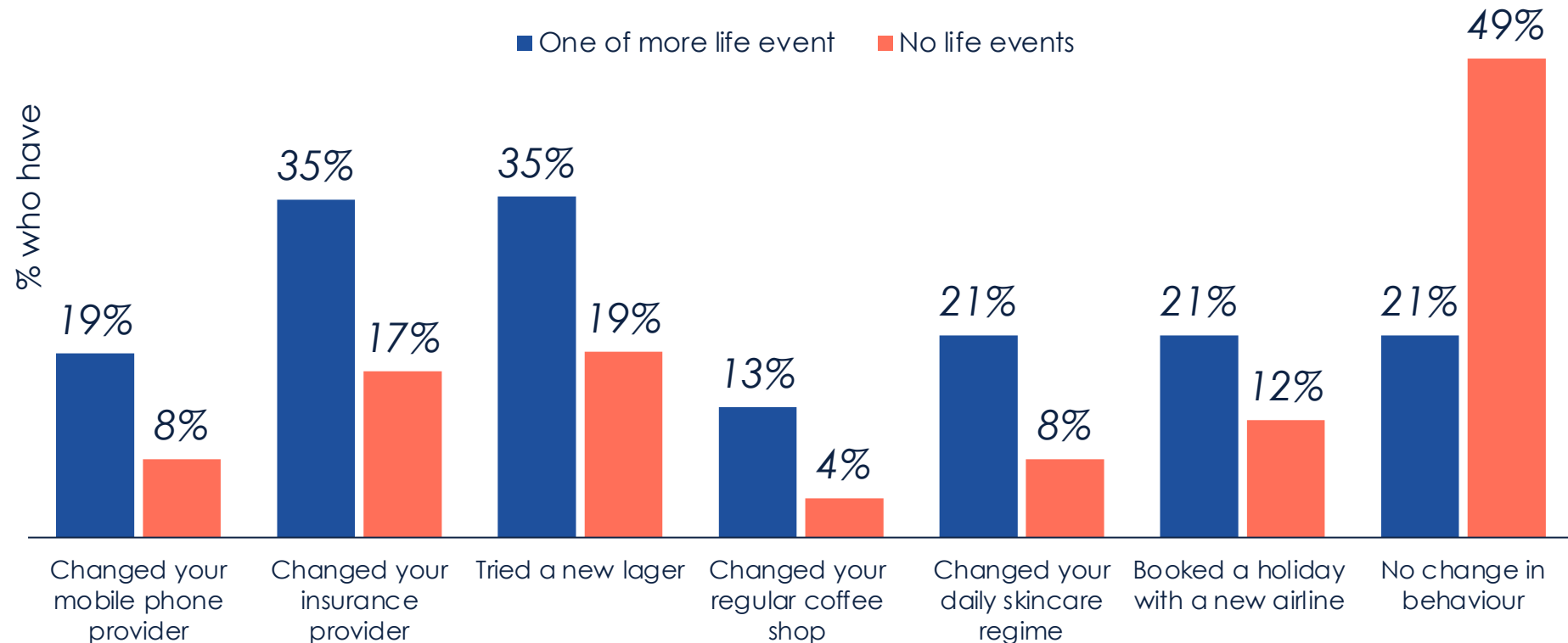


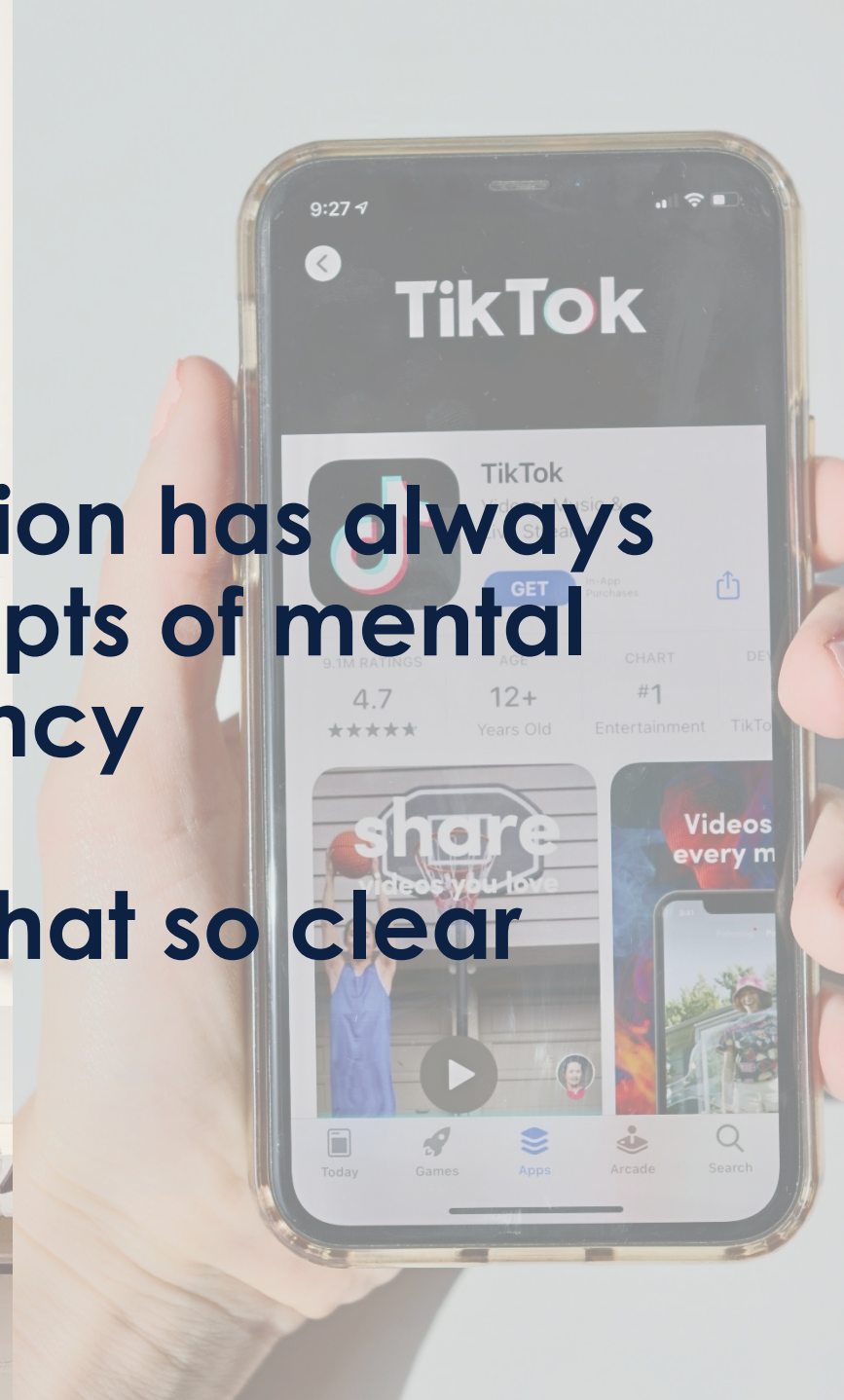
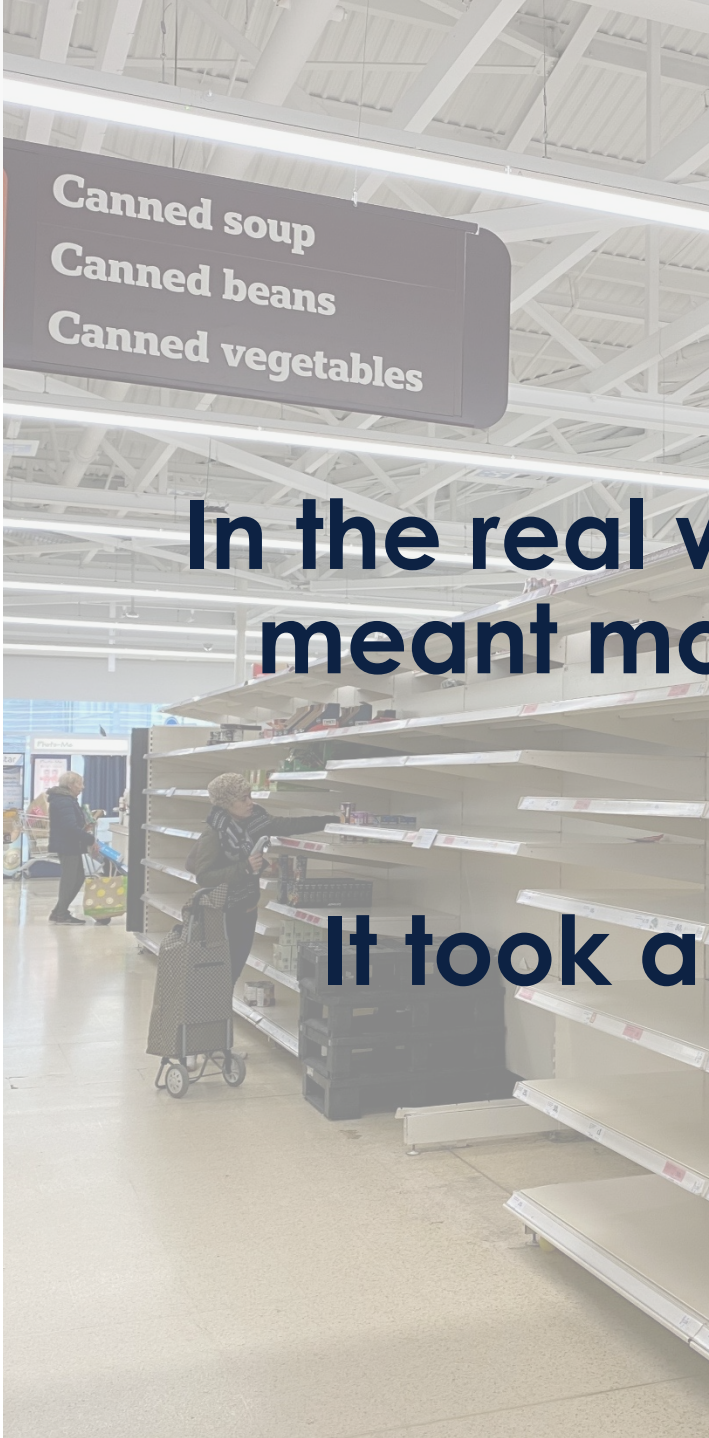
Why we do what we
do and how to *change*

To 'Points of Change'

COVID was just another life event opportunity, different in size but not of type

Which of the following have you done recently?





**In the real world, effective attention has always
meant more than crude concepts of mental
availability and saliency**

It took a pandemic to make that so clear

Will the past predict the future?

?



Thank you

