

final report

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Gamification (Experience More) – Zappar AR proof of concept developments for red meat

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Executive summary

Augmented Reality (AR) can play a role in enhancing the red meat usage experience, forging a stronger brand connection. As consumers and the marketplace continue to adopt internet of things (IoT) along with an ever increasing popularity for mobile phone use, an opportunity to experiment in marketing mix and experiences for red meat users is possible.

This project considers several Minimum Viable Product (MVP) concepts to provide a tangible and introductory working examples of some of the key features of AR apps for Australian red meat products. These MVPs were also showcased at MLA led [Australian Ag Immersive Technology Conference](#), where feedback from attendees was gathered along with some preliminary customer discoveries.

We thank the contributions of Andrew Meats Industries, Crazy Dragon, Jims Jerky and Arcadian Organics for providing permission to use their artwork designs to create the AR MVPs.

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1. Introduction – AR Customer Research

Augmented Reality has a significant role to play in enhancing the red meat usage experience, forging a stronger brand connection and favourably influencing the purchase decision:

When the Augmented Reality ‘Call to Action’ resonates with the target consumer, it provides a strong platform from which to engage with a red meats brand story. It is also able to greatly magnify the levels of engagement of branded content, such as YouTube video’s, that through AR apps become relevant and useful to consumers.

Augmented Reality is able to deliver a fun and involving brand experience, that can enhance the usage experience, particularly where a social and fun dynamic is involved – friends and family sharing food / snacks enhanced through a brand driven AR experience.

Mobile Augmented Reality has become a very big part of our society now, with one of the largest use-cases coming through ‘selfie-culture’ on social platforms like Snap and Facebook/Instagram. Snap claims that 70% of 190 million daily active users spend three minutes and more using AR each day.¹

A 2018 Gartner survey² indicated that, by 2020, 46 percent of retailers planned to deploy either AR or VR solutions to meet customer service experience requirements. Additionally, the technologies behind these solutions have moved 15 to 30 percent further along the [Gartner Hype Cycle](#) over the past 12 months.³

This would mean that by 2020, 100 million consumers will be shopping using AR.

So the purpose of this report is an initial investigation into how and where meat products at-retail can tell their own stories and how they fit into the trends and predictions of, for example, the world’s largest consultancies who have all formed sizeable AR/VR divisions including Accenture, Deloitte and PWC.

It is notable that at the Augmented World Expo Europe on 18th October 2019, in a presentation by Richard Hesse: Immersive Experience Lead (AR/VR), IT Innovation at Nestlé, he said:
“Technology is fundamentally changing mindsets, shopping behaviours and food expectations”.

While many marketers moved from mobile apps to the web over the last decade, as we begin to use our phones in increasingly complex and advanced ways such as computer vision, AI, 3D visualisation, AR is most robustly (but not exclusively) activated through mobile apps, so it is important to also address the adoption of ‘an app’, in the consumer journeys.

In addition, the default behaviour and expectations of consumers is not they can AR-activate a piece of packaging, and many don’t have the time to do-so in their physical shopping journey, so the call

¹ <https://www.adnews.com.au/news/snapchat-s-augmented-reality-advantage-in-social-media-platforms>

² Gartner’s Unified Retailer Survey was conducted online and via computer-assisted telephone interviewing (CATI) from July 2018 through August 2018, with 97 respondents in Europe (including the U.K.), the U.S., Canada and China.

³ Gartner Press Release: <https://www.gartner.com/en/newsroom/press-releases/2019-04-01-gartner-says-100-million-consumers-will-shop-in-augme>

to action and promotion of added-value is extremely important, and the brand needs to decide whether to aim for a very short at-SKU experience, or a more complex experience for the consumer when they have arrived home, for example.

Augmented Reality in CPG is less like re-designing packaging to stand-out on a shelf, and is more akin to putting 30% more product in a packet. In other words, the consumer won't know unless you gain their attention and tell them, and once a brand has, the product's perceived value can be increased virtually and at limitless scale, without any additional product-related costs. In this study, we were not able to replicate and/or seed packaging into a real retail environment, so the investigation instead focuses on whether or not AR does add that 'perceived value' to a product and which method of telling a brand-story, through AR, resonates most and least strongly with a control group of consumers, if at all.

Four Augmented Reality experiences were developed to explore different red meat categories within the supermarket shopping environment. Each faced unique current challenges, without AR, reflecting the different dynamics of each category: 'Ready to Heat', 'Ready to Cook', 'Ready to Eat', and an Organic/provenance-focused product.

The Augmented Reality was activated through the free Zappar app for iOS and Android, and some (Jims and Cleavers) were also available through WebAR in a Chrome or Safari browser, per <https://web.zappar.com/>. One reason Zappar was chosen is because it is the AR platform used by global retailers and FMCG's such as TESCO, ASDA Walmart, Carrefour, Coca-Cola, Nestle, Unilever, Mars Wrigley and many more. Zappar has also just been launched as the world's first Augmented Reality WeChat Mini Program, which means 1.29B Chinese consumers can engage without the need for an app, and anti-counterfeit invisible code technology is also possible through the platform. With China as such a large consumer of Australian meat exports, this trial not only identifies the opportunity at-home, but also in our biggest export market in Asia.

Ready to Heat – Andrews Lamb Shanks: an AR experience would ideally address the issue that the vendor has with using special heat-retaining packaging that cannot be printed in 4 colour-process, so images of the product cannot be printed on the outside. This means that the product portions and appearance are hidden from the consumer. If the consumer does open the heat-retaining box, the product is vacuum-wrapped and does not look appetising. So if at the very least a consumer can see the product in an appetising, styled format, it would be a better consumer experience than the current methods.

Ready to Cook - Crazy Dragon an AR experience would ideally help the brand to speak to a predominately Asian audience, and convey the unique selling proposition of being an Australian product in Asian markets. The MLA had already invested in an acclaimed Virtual Reality 360 video paddock-to-plate experience, working with Crazy Dragon. But this experience was limited to the availability of VR headsets. By connecting the 360's with AR, this experience could link consumers with the provenance and care and passion behind a product: dumplings that otherwise rarely convey the quality of the meat. This experience was aimed at Asian consumers, even allowing them to choose their language which gives the brand very insightful first-hand analytics about the first language and demography of their consumers.

Ready to Eat - Jim's Jerky an AR experience would ideally address the issue that there is a perception of jerky meats that they are very chewy and are eaten by an older male audience. Because of new proprietary techniques that allow Jim's Jerky to be snap dried and take-on a crunchy character, Jims wished to promote this while seeking to move beyond the traditional jerky consumer and make the product attractive to a new generation/demographic, potentially even a social and digital-native audience that would also be native to AR.

Organic/Provenance - Cleaver’s Hotdogs an AR experience would ideally address the lack of knowledge about the gap that exists between standard hot-dogs (aka ‘mystery-meat’) and Cleavers which are nothing but high quality certified-organic meat. Cleavers also wished to appeal to a female audience in AR, as they do on their website, holding up women as the household decision-makers that they are, and who are also concerned for the health of their family.

Recommendations – the future is closer than we think

There is a strong case that meat products should be at the forefront in embracing this new communications platform, focusing on the truth, the real stories and clear messaging amongst any societal misinformation. Cooked and fresh meat is a much faster moving consumer-good that many others, so the opportunity is there to tell a serial, an ongoing story in AR, but brands must be prepared for more than a once-off activation that might otherwise work for a product with bi-monthly frequency for example. With that greater basket-frequency also comes the opportunity to create and shape user behaviour around this new direct-to-consumer digital interface, if any initial hurdles of awareness and adoption can be overcome.

Proximity of message-to-product is also important, whether that message is printed, broadcast, online, billboarded, point-of-sale-advertised etc, because the further the consumer is from the product, the less likely they are to remember the message. But category-mindshare can overcome this. According to a study by Mindshare Futures in the UK, and research by Neuro-Insights UK within it, consumers are 70% more likely to remember a brand-story in AR than any other media channel.⁴ So even if they have their AR experience at-home, there is a greater chance they will then remember your product in-store on their next visit, than if a consumer encounters a brand’s advertising or media through other channels.

The Argument Against:

Additional messaging is required to bring shopper awareness to the AR, at least using dedicated Point-of-Sale in the initial stages of an AR conversation with consumers, which does add campaign-cost.

Consumers are otherwise unaware of the AR and won’t necessarily recognise a ‘Zappar icon’ , for example, on the pack - or register what it means. This also means the value-exchange needs to be made very clear to the shopper: ie – “if you do this, you will get this” (and technical terms need to be avoided – because people won’t activate AR ‘just because it is AR’).

The greatest challenge is likely the grocery shopping dynamic and scanning on-the-fly. When shopping, will the consumer notice nothing but an on-pack call to action, given the hectic and often stressed nature of grocery shopping? It is often stated that between 80 to 90% of grocery purchasing decisions are driven by pack visual recognition and responding to visual cues, such as yellow promotional stickers, as against reading on-pack content. So it is an important consideration what iconography and copy-frugal Call-To-Action must be used, to activate consumer behaviour, *if* you are relying on in-aisle engagement.

It is worth noting that the red meat industry is generally not currently as experienced as other FMCG industries, in undertaking above-the-line campaign-content to achieve cut-through of messaging that would complement the adoption of an Augmented Reality app (as has been the case with 19

⁴ <https://www.mindshareworld.com/sites/default/files/MS-Layered-Report.pdf>

Crimes wine in the wine industry for example, where the AR was directly responsible for growing the brand in the US Market by 131% in a year⁵). But that is where there is an opportunity to create a supply-chain of more advanced content directly from the paddock to the packaging.

The Argument For:

The counter argument is that the world is changing rapidly, and consumers are adopting AR in different guises. Many have tried furniture-buying AR apps from global leading brands like IKEA⁶ and Amazon⁷.

7-Eleven in the USA are activating ongoing AR content to tell the stories and add gamification to FMCG vendor-brands. In the space of a year and across 30 experiences, more than 236,111 hours has been spent by engaging with AR content, by their shoppers. 59,027 hours of that brand-storytelling time was spent engaging in-store.

The quality of experience is much higher than other formats because it is a 'push-metric' whereby a consumer chooses-to-engage and doesn't have messaging thrust upon them. And their engagement is not only visual and aural but is also kinetic/physical. And if the AR can cause the consumer to touch the product, consumer psychology has proven that the chances the shopper will buy it increases by 80% instantly⁸.

There are also undoubted advantages in being one of the first-movers, as a brand will be seen as contemporary, innovative and 'cool' and can take advantage of the novelty, as consumers will no doubt embrace AR to discover and experience it for themselves. But certainly for younger generations, the opportunity to be their first AR experience is likely to have passed, such as the 7% of 7-12 year olds in Australia whose parents shopped at Woolworths and who have activated the 'World Explorers' AR campaign-poster for an average of 18.5 minutes⁹.

The AR Opportunity for Red Meat

The areas where the Red meat industry should focus its efforts to realise the benefits of adopting Augmented Reality are:

1. Providing meal inspiration. A great many consumers have little idea as to what they are going to be eating that night, when they walk into a supermarket. They typically think of the type of meat they want first ('centre of plate'), as the basis for the meal. AR can ensure this desire translates into purchase, through visualising a delicious and achievable meal. This is particularly so, if AR helps them to achieve the meal solution, by encouraging the purchasing the other required items, as part of the same shopping journey. This also taps into popular cultural trends, such as the plating-up of food made so popular by shows like Masterchef and MKR etc.

⁵ <https://www.cmo.com.au/article/632790/treasury-wine-estates-pushes-consumer-engagement-augmented-reality-app-portfolio/>

⁶ <https://www.ikea.com/au/en/apps/IKEAPlace.html>

⁷ <https://www.amazon.com/adlp/arview>

⁸ https://www.researchgate.net/publication/227630721_The_Effect_of_Mere_Touch_on_Perceived_Ownership

⁹ <https://www.zappar.com/campaigns/woolworths-world-explorers/>

2. Gamification and even leveraging pester-power of a younger demographic who are compelled to 'collect' and play AR experiences that teach brand-stories through play and may also integrate popular buying triggers for parents such as STEM-education.
3. Running competitions that are directly-linked, and data is digitally-gathered through the pack.
4. Providing cooking guidance. Many consumers have a limited repertoire when it comes to cooking, or are nervous, even when it comes to cooking the most basic meals (i.e. steaming dumplings). Having engaging and entertaining content in 2D and/or 3D can provide 'how to' step-by-step guidance, and can greatly enhance confidence in cooking, particularly for a new generation of cooks, such as Millennials.
5. Telling a deep brand story. Many premium offerings in the red meat market have a provenance or quality systems story to tell. Within the right category context (especially organic meat), and for the right audience, consumers are eager to learn more, though are not likely to go 'out of there way' to source this content such as navigating Google to find-and-view a website or finding a YouTube page using a similar search-method. AR provides a quick, effective and mobile-centric platform for 'meeting' the people and places behind the offering and appreciating where and how it was produced. Most especially for consumers that appreciate the 'Australian-ness' of a brand, this can be a strong validation of quality and paddock-to-plate.
6. Enhancing the snacking experience. AR has established itself, through apps like Snap Chat in this regard, as a medium that allows enable consumers to have fun modifying and sharing images of themselves. This is rich territory for snack brands to leverage to enhance a social, snacking experience. A 'face filter' worked particularly well for Jerky in this study, that brings out the 'big kid' in all of us, when shared in a fun, social situation. When captured through images or videos (especially in a 'selfie' mode), it can be shared across platforms like Snap, Facebook, Twitter, WeChat, Weibo etc.

2. Background

The *Experience More* megatrend is defined as prioritising experiences over things, where consumers engage directly with a product/service, and in return they receive an enhanced and unique experience with the brand. Consumers are seeking-out authentic, personalised experiences to suit their individual tastes, preferences, and lifestyles. Appealing to the senses and using technology as an enabler, brands should strive to provide value-added experiences.

In fact, Time Inc did a study of 17,000 Gen Z's which showed that Gen Z was particularly open to deepening brand relationships with 93% reporting they want to see brands do something new, unique or creative to get their attention, 88% like the idea of brands using custom content to get introduced, 84% think custom content is a way to engage with them and 72% want brands to use video and infographics for better storytelling or data exploration.¹⁰

So if you are wanting your brand to have longevity and engage the next generation of consumers, these are important indicators.

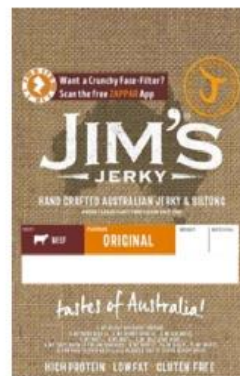
Augmented Reality has been identified as potentially playing a significant role in addressing problems consumers experience with Red Meat. In this project, red meat offerings from different categories provided the basis from which prototype AR applications were developed. For each offering, key consumer challenges were identified by each client, which then formed the basis for the development of the AR application.

Each AR application has an on-pack call to action, along with a Zappar-code (aka a Zapcode) which instigates the AR experience and localizes the correct content to appear on-to-near the pack. This call to action is designed to promise an AR experience that is relevant to the challenges the target consumer faces in relation to buying and/or using the category. This is either discoverable via supporting POS and omnichannel media along the path-to-purchase, or is organically-encountered, once a consumer has bought the product. Subsequently, the AR experience needs to deliver on that promise, potentially establishing a long-term relationship and direct line of communication between the consumer and the brand, which gives brands data and shopper insights that are currently brokered as-data, by retailers.

¹⁰ <https://www.marketingdive.com/news/time-inc-90-of-consumers-like-custom-content-for-brand-engagement/446024/>

3. Objectives and Methodology

Four demo-concepts have been developed to assess the impact of AR in different red meat categories/areas within the supermarket – Ready to Heat, ‘Ready to Cook’, Ready to Eat’, and an Organic/provenance-focused product. Each of these categories exhibits different consumer pain points associated with purchasing and usage. Whilst the research assesses the overall halo effect of utilising an AR application, its primary focus is in to assess the effectiveness in addressing specific consumer pain points within each of the identified categories. Zappar coding was used at the enabling technology platform. This includes the zapcode solution. Zapcodes make the platform scalable, affordable and flexible, and are today used to power experiences for some of the world's biggest brands. There are also other tools such as ZapWorks and the free-to-download Zappar app, embed component (SDK) and white label app solution for unlocking augmented content in the real world. See more at: <https://www.zappar.com/>



4. Results and key findings

4.1 Vendor Feedback

Feedback was collected from the brand owners (Crazy Dragon, Jim's Jerky & Arcadian), as to their experience & expectations from having developed an Augmented Reality offering, albeit that they were yet to put it in front of any consumers and that their contributions were limited, given the nature and constrained scope of this research project. Although it should be noted that at least two of the participating brands are looking to now move beyond the trial-stage.

What advantages does Mobile-AR offer?

It provides a doorway into existing e-content that the brand already possesses, that is not being utilised (little existing customer engagement).

AR content is a paradigm shift in the way customers can experience the brand (from a static image). It's a quasi-tactile technology that enables the customer to feel in control of the content, able to explore and have a more immersive experience, compared to passively watching a YouTube video. And because it causes the User to touch a product, it increases the chance that product will be bought by at least 80%¹¹

There is an expectation that AR will have the greatest impact by engaging consumers whilst they are grocery shopping – engage with video content via their phone, turning every pack into a video channel for the brand, enhancing engagement beyond the usual few seconds. But brands who do, rather, seek to engage the consumer in a small way at POS and then more extensively at-home have had the most success across major AR platforms.

Attract a new generation of consumers that are very 'plugged-in' with technology, enabling us to engage with them in a fun way.

Bridge language issues through AR, being able to customise and translate a brand story for consumers virtually, without the significant brand-cost.

Be able to refresh and update the content from the cloud, add new competitions etc, without having to change the packaging or code.

How valuable is owning your own customer data, through an AR offer?

It is clearly seen as being preferable to have ownership of your own customer data (aka first party data), as otherwise it tends to come with a cost and may be skewed for interpretation, if the vendor needs to access through a 3rd party retailer. Having the data is the platform for building a relationship with your consumers and iterating/optimising content and comms.

How useful is being able to respond to customers directly and do you think they will respond positively?

This was felt to be an important part of how the world is changing. Consumers are not only seeking information in the online space, but sharing, discovering and sharing, making having a connection into this world important for future success.

¹¹https://www.researchgate.net/publication/227630721_The_Effect_of_Mere_Touch_on_Perceived_Ownership

Being accessible to our customers and being able to respond to their concerns in ‘real time’ is very important. The on-line channel becomes another way in which we can do that.

Any reservations or specific considerations?

There were a range of concerns from vendors that they apprehended might be barriers to adopting AR technology:

- Will it merely drive novelty purchase and not lead consumers to immersing in the content?
- Can the technology effectively engage the shopper in the retail environment – juggling a phone and shopping basket, within a pressured shopping environment
- It is costly to implement a program and not sure that the ROI is there
- Consumers will need to have downloaded the Zappar app for it to work

Are you likely to integrate AR in the future? What time frame?

All brand owners believed that they would integrate AR into their marketing programs in future. If their focus was an Asian market, it would be in the near future (inside 6 months), whereas for the domestic (and before they had seen any market they felt it was more likely 1-2 years away):

- Asian consumers have adopted scanning on-pack (QR) codes, but that behaviour is less prevalent here in Australia
- Need to see other brands have success with similar programs, from other categories
- Entertaining kids is a more established entry point for this technology

For each of the four AR concepts, the following stages of engagement were evaluated:

1. When the offering is viewed on-shelf, does the AR based **Call to Action** and perceived value-add drive purchase?
2. Once the offering has been taken home, does the subsequent **AR experience**, deliver on the promise / a rewarding experience?
3. Does the **AR engagement** provide a platform for building a long-term relationship with the brand, as content is refreshed?

4.2 Qualitative feedback from Research test Groups

Consumer research groups were determined to be the best way to test the four red-meat based offerings. Whilst it would have been ideal to have tested them in a more ‘real world’ environment (in-store purchasing and at home product usage), the offerings were designed for research, and not for commercial execution which would have necessitated commercial packaging integration and the sort of POS and promotional awareness that would typically be required. Sourcing a focus group allows for a more controlled research environment and a deeper exploration into attitudes and beliefs.

Respondents were selected as very competent users of mobile phones. They needed to have a current mobile phone (iPhone 8 or later), categorise themselves as fairly advanced users and be fairly heavy users, their phone having become pivotal to many parts of their life (i.e. banking, Uber, etc.).

Respondents also had to be users of at least 2 of the 4 categories that were our focus, to ensure we had at least 4 respondents in each group that were category users. They had to be the main person

in their household who did the grocery shopping. A reasonable mix of couples and young families, females and some males were represented in the groups.

Finally, 2 groups of 8 people were organised:

Group 1: Did their shopping after work – typically being 9 to 5 people.

Group 2: Able to do their grocery shop during the day, whether they be stay at home mothers or people with flexible working arrangements.

Research was held in a group facility that allowed video recording of the discussions.

9 TO 5 WORKERS, MILLENNIAL SKEW



STAY AT HOME MUMS, FLEXIBLE WORKERS



Note: Quotes from research group are delineated by the group and time – i.e. I vs. II

How Mobile Phones are Changing our Lives

Respondents recognise that mobile phones have infiltrated many parts of their lives. Most admit they hate to think how much time they spend on their phones these days, it being the first thing they look at when waking in the morning (it often being their alarm clock) as well as the last thing they look at before turning off the lights (many mentioned the ‘blue-light’ function to aid getting off to sleep).

Most people have significantly reduced the size of their wallets. Mobile phones have transformed many categories, such as ordering a ‘taxi’ via an Uber app on one’s mobile phone, or of organising take-away dinner. Many consumers are streaming home entertainment via their mobile, as well as controlling their solar panels and other devices. It has even reached the point where respondents cited that they no longer use, or need, a home computer, as they can do it all on their phone.

Whilst there is no obvious negativity towards the usefulness of Mobile Phones, some are wary of privacy, not wanting to embrace Google Home Hub and other similar ‘listening’ devices. Those with young / junior school children are consciously making an effort to not use their phone whilst they are around their kids, as they believe it sets a bad example.

When asked if and how they might be using their phone in 2 years hence, none had any clear picture of what more they thought they would be using it for. However, some did mention that they felt other devices might start to replace mobile phones, with a few relying upon their ‘smart’ watches.

The Grocery Shopping Dynamic

For the majority of respondents, grocery shopping is largely considered a chore. It typically takes place when one is pressed for time, or would rather be somewhere else, such as heading home after work. It is inherently stressful, trying to complete a number of tasks (a notional shopping list). Respondents were also wary that they are being influenced in undesirable ways, such as being coerced to buy things, though they have mixed feelings about this. This is particularly true of Millennials who tend to shop on an as-needs basis, as they work out each and every day, how they are going to feed themselves.

Decision making within the grocery shop is largely undertaken on autopilot or responding to 1-dimensional evaluative cues (i.e. finding the best value offering, from the yellow promotional stickers). As such, in most categories, on most occasions, respondents claimed they do not ‘read’ what is written on the packaging when making their choices. However, purchasing meat is a more involved decision, for a couple of reasons:

- You can’t ‘trust’ meat in quite the same way as you do FMCG products. There is still the chance of inherent variability, or getting a ‘bad bit’, that doesn’t exist with FMCG’s production consistency.
- It is one of the more expensive items people purchase, and thus represents a greater risk. Whilst red meat is typically more expensive than offerings like chicken, it is also perceived to be more special.

I spend more time buying my meat and fresh vegetables. There’s more to weighing up and comparing – different levels of quality at different prices, use by dates and what looks better. Whereas if I see Up&Go is discounted, I just grab them, they’re always useful to have. (II 33:30)

Key learnings from consumers

Unlike Virtual Reality, which most of the respondents had seen people wearing the glasses (in shopping centres at experiential pop-ups etc.) they were unaware as to what Augmented Reality was. However, this lack of understanding is around the term 'Augmented Reality', as most at least knew of some form of AR experience - Pokémon Go or Furniture Apps. Discussion around these types of applications gave everyone a good initial impression of what the technology was all about, about AR *is*: placing objects and experiences in the real world when viewed through a phone camera or eyewear, in such a way that the content appears to attach/anchor itself to the world and have physical properties.

The focus of the research was to assess the usefulness of 4 designed-for-task contrasting AR Apps, to impact the purchasing decision and subsequent usage experience. Each of the offerings and corresponding AR apps were evaluated in isolation:

1. Respondents were shown the offering as a 2D pack visual. The group discussed its appeal in the context of the choice within the category. At this point, whether respondents were frequent or occasional category users was identified.
2. If respondents had not noticed the AR Call to Action, so this was discussed. Was it appealing-enough, was it motivating and worded effectively and what were their expectations of the potential AR experience? Respondents indicated whether they would like to be able to experience the AR App, as part of the purchasing process or whether it was solely relevant having purchased the offering.
3. With little direction, respondents were then allowed to explore the AR app for themselves, working with their own mobile phones. Respondents were given 3 to 4 minutes to explore, without any direction. Their reactions, degree of involvement and experiences were observed during this interaction.
4. As a group, respondents first impression of the experience was discussed, before more detailed assessment of different aspect of the AR experience explored. If respondents had not experienced a particular pertinent aspect of the AR app, or had missed it all together, then they were allowed to briefly re-visit the AR experience.
5. There was some discussion as to how people typically go about purchasing within a category, to ensure their real-world shopping experiences were brought to the fore. The usage of the category was also discussed – what role it played in their food / snacking occasions and when and why they chose the category. From this the PAIN POINTS associated with the category were identified, both purchasing and usage, as well as the challenges the offering faced in getting chosen and satisfaction in usage.
6. In light of this identification, the AR App's Call to Action (on pack) and immersive experience were discussed and evaluated in terms of their usefulness and relevance to these pain points and challenges.
7. Finally, a number of potential extensions of the AR apps capabilities were explored, to assess further appeal and relevance (for example, having the ability to register one's own culinary creations through the AR app). Respondents growing enthusiasm for AR's capabilities also led to them suggesting what they felt would be most useful to them.

Respondent Challenges with AR

For the majority of respondents, this was their first proper experience with AR. Experiencing the applications in a group setting allowed them to help each other, as some struggled to come to grips with what they were supposed to be doing, or their phone / network was not up to demands being placed upon it.

For example, the most impressive AR Experience – Crazy Dragon, some respondents struggled to get it working at first, missing the dragon-animation all together, not realising they had to continue to hold their phone over the pack image.

For others, they thought the technology was not working for them at first and they were becoming visibly frustrated. Some respondents had the plated-up lamb shanks come up very small on their phone, to make the experience disappointing.

However, the contrast from the very beginning of the 2+ hour research group, to the end, was stark. Once they had engaged with this new interface just a little, respondents were far more comfortable with the technology and thus able to freely explore the content that was made available to them. This reasonably represents what will happen in the real world – consumers will very quickly get the hang of it.

4.2.1 MVP #1: Ready to Eat Lamb Shanks

Ready-to-Eat Roasts, Category Dynamics

The target customer for Ready to Eat lamb shanks are consumers who typically determine their food choices on a day-by-day basis. On any given day, come late afternoon, they have not yet decided whether they will cook at home, pick up take-away, use Uber Eats or eat out. Thus, on those days that they decide to cook for themselves and combined with the reality of not having much in their fridge at home, they walk into the supermarket, at the end of the working day, looking for all the necessary components for a complete meal.

This is in contrast to more organised and proficient cooks, who plan the majority of their week's food in advance, have a well-stocked fridge and are inclined to be organised when it comes to preparing food. These consumers would much rather buy (raw) lamb shanks in advance and load everything up into the slow cooker in the morning, so their meal is ready when they get home.

A Ready Roast Chicken is a no brainer – it's a popular and traditional choice, great value (dinner and lunches tomorrow), a simple meal, it's only down-side is it has become a bit 'same-old' as in many households it gets bought most weeks.

The Slow Cooked Lamb Shanks offering promises to be *a bit special*, pricey (respondents imagining it to be a little over \$20) and somewhat challenging, to do it justice as a delicious meal.

The chickens are much cheaper. It's nearly dinner time and I need something now, that's when I go and buy a chicken (I 49:00)

Lamb Shanks, that sounds great. 14 hours slow cooked, I would definitely grab that. How much would it be? That's the only thing with lamb shanks (they're expensive) (II 36:00)

I think it's good, it comes in cardboard, I'm all about recycling (an issue for ready roast chickens) (II 37:00)

Unlike chicken which is a no-brainer, a quick and easy meal, these lamb shanks are for a big dinner, like a Friday night / end of the week meal. But it depends on the price, above \$20, makes it a nice meal vs. a \$10 chook. (II 51:30)

Lamb is a bit more special, like for Valentine's day (I 51:30)

Challenges & Pain Points associated with Lamb Shanks (amongst target customer)

- Justify the price premium - \$20+ vs. \$10
- Ensure I get a good one – consumers know they are not all the same size, and some are fresher than others, requiring a quick inspection to select one
- Envisage the total meal – what is the sauce and the side dishes that do it justice
- Quick and fool proof putting together at home, to create the meal

I'm not sure I have any trouble knowing how to combine lamb with other ingredients to make a meal. Maybe if it was an ingredient that I did not know how to use (Experienced cook) (I 31:45)

I'd probably want to see it, like you can see the chickens, I'd want to pick one, like I do my chickens. Some are too dry, what time were they cooked, I've had a bad experience before – I'm really picky.

I'll pick a fresh one. I might even ask them (coming out soon). But if I don't like the look of the ones there, then I won't get one. I'd like for there to be a window; it might be tiny inside. (II 47:10)

Reaction to AR Application



Motivating Call to Action: The idea of Plating Up with a Virtual Chef was appealing, addressing the major challenge of realising a delicious meal, with the lamb shanks the core ingredient.

(what do you notice about the pack?) There is the Zappar code – it gives you ideas as to what you could have with it, to make it a meal. (Is that useful?) Yes, any tips would be welcome. (II 37:40)

I'm not sure I would have the time to get my phone out – I don't generally have the time (II 38:10)

It would be good if it prompted you to pick up the other pre-made ingredients that are also in the store, to complete the meal (I 58:40)

The whole plate-it-up thing reminds me of MasterChef. I'm not sure I want to go to that trouble (I 33:15)

If I pick up the box and I see the end-meal as a picture, on my phone, I'm not very likely to put it back down. You too can plate up really nicely (II 54:10)

AR Experience: Whilst quite simple, it was desirable. Being able to see the plated-up and 3D-scanned food enhanced the appeal, going some way to justify the price premium and left (some) people craving lamb shanks. However, the inspirational experience is primarily valued by the target consumer, if it can take-place within store, allowing them to purchase the other required ingredients.

It looks pretty good though – wow, yum. It's on the table now. Can you change it to give you other ideas? (general excitement & high energy levels as shared experiences). (II 39:10)

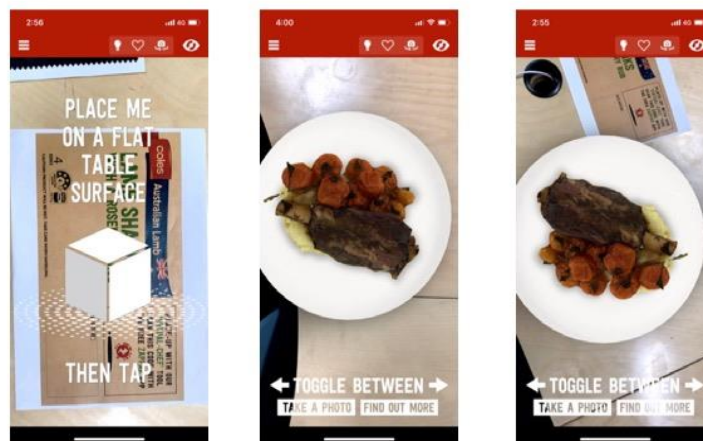
I said I probably wouldn't do it, but it was actually really easy. You get to see the product – it gives you an appetite for it. It does make you very hungry. (II 42:17)

If I'm picking this up, I've probably run out of time to cook dinner, so I want ideas that are quick and easy. For me, mash potatoes take a long time, I'd prefer ideas that are quick and easy. (II 43:30)

It should be combined with ideas of where to pick up the other items, in aisle X there are ready to heat potatoes, that only take 4 minutes to cook in the microwave (II 44:00)

If you are in a rush, it would suit some people. I think my husband would be pretty happy if he came home to that (II 46:10)

Platform for a Relationship: There is definitely opportunity to build an ongoing relationship with the target customer, an ongoing dialogue about serving suggestions and food presentation, as to some degree they are interested in new ways to turn this ready to eat lamb shanks into a delicious meal. However, the participants in this target market (buying ready to eat lamb shanks) is not currently inclined to want to share their meal efforts back, given their more limited cooking skills. But that is just the current behaviour that no-one has yet sought to change.



It's making me hungry. It looks like a roast. (I 37:00)

It's kind of making me hungry. I wasn't feeling like lamb before, but now having looked at it, I'm starting to salivate (I 39:15)

Having done it once I'm not sure I'd ever want to do it again (I 39:30)

It was quite exciting, a bit different. But it's a bit of a gimmick (I 43:10)

It would help with the mundane, oh my god, what shall I cook this week. You can just go in there, you don't need to think about it before you've left the house. I'll see what meat there is, or fish, just look, take a picture with your phone, that looks good, and then off you go and do your shop (II 55:40)

Enhancing the AR experience / Respondents' own thoughts

The primary desire would be to be able to have the plated-up lamb shanks experience in-store, delivered in a short time frame (15 seconds) and easier to realise / a conducive set up (such as a table-top as part of the ready roast display). Getting a list of other items that you thus need, with an indication of what aisle they are in, would really help. So there is potential collaboration opportunities with an FMCG or other primary industries such as horticulture.

Having a choice of a few different meal options, to suit different tastes and skill levels – a system learns to understand your preferences.

Having an additional supportive 'how to' video or images – i.e. many felt nervous about being able to successfully turn the meat juices into a sauce.

Some form of competition that allowed consumers to share their own lamb shank, based creations would appeal to those more confident cooks, who would be less inclined to buy ready-to-eat lamb shanks.

It's like at McDonald's the picture of the burgers is very different to the actual burger you get. I'm worried that it's a fake, versus what is in the box (both groups made same comments re McDonald's)
(II 56:30)

(You could photo your own meal creations and share them back, what do you think of that?) That would be cool, I'd be doing that. Seeing someone's actual meal, rather than seeing a virtual one. Like when people visit a restaurant and post their meal on Instagram, that gives you a much better idea what the food is really like. Seeing that would sway me more than the digital version.
(II 57:00)

4.2.2 MVP#2: Crazy Dragon Lamb Dumplings

Frozen Dumplings Category Dynamics

Asian Dumplings, have for many, become a regular part of their shopping basket. Having acquired the taste at Asian Restaurants, the opportunity to prepare and eat at home has caught on. They are a handy product to have in the freezer - when you don't feel like a full dinner but want something quick and tasty (like on a Friday night). They also work well when having a few friends over for a catch-up, going well with a drink.

Respondents said they typically bought on price promotion, with some pretty good deals on offer, particularly as they see a number of brands as being on a par with each other – they're all pretty good. The quality of the meat inside is rarely featured or considered. Respondents were not familiar with the Crazy Dragon brand, but it looked equally credible to the other premium offerings in the market. What caught their eye, was that it was *lamb*, as pork or prawn are the norm. This alone made it appealing and respondents who bought the category were eager to trial them.

I love lamb and to be able to have it in a dumpling, is very appealing (I 1:11:30)

I see dumplings as a starter or appetiser, normally we'd just have them on their own – my husband, the kids. We always had them as a starter at a restaurant. I'd be interested to see what else you could do with it, how else you could eat them (II 1:01:00)

Challenges & Pain Points associated with Frozen Dumplings

- Good Quality – reasonable proportion of meat / prawns, rather than predominantly fillers
- Authentic & Real Ingredients – made with the right stuff and not too long an ingredient list, such as additives and preservatives
- Accompaniments – dumplings are felt to be so much better if people have the right 2 or 3 sauces to go with them, particularly when casual entertaining
- Some basic cooking instructions – many were eager to learn more about crisping them up in the frying pan
- Other uses – consumers sophistication has extended to wanting to start putting the dumplings in soups

I've kind of accepted with a dumpling that it's not that healthy. It's a dumpling, its full of fillers (I 1:17:15)

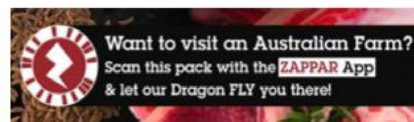
This package tells me that I want to know – its Australian Lamb, that's it really (I 1:18:30)

Oh yum, lamb. It looks like it would be easy to prepare. (II 59:00)

I don't trust them, I never buy them. I always think of them as being poor quality, or bad ingredients (II 1:00:00)

I like it when they crisp them up on the bottom, I don't like it when they're soggy. I think they look like normal dumplings. The presentation is nice (II 1:00:20)

Reaction to AR Application



Motivating Call to Action: For this group, the idea of Visiting an Australian Farm was not at all appealing. When choosing dumplings, whilst recognising their primary ingredient is meat, these respondents did not want to see the once ‘happy animals’ frolicking around the field (their interpretation). Thus, they felt unlikely to want to buy the Crazy Dragon Dumplings offering, on this basis. Respondents felt that a ‘quality source’ reference is all that is required, in this instance – Free Range, Grass Fed, Organic, etc. This does fly in the face of the Paddock-to-Plate movement but these particular consumers and potentially the category they represent, are less inclined to want to know the origins as-proof. That said, and if this research was focused specifically on Chinese consumers (this experience did have a Chinese translation version), the idea of the Australian farm and the culture-driven interest in meat integrity, may make this sort of activation ideal.

I’m not sure that people want to know this. If you’re going to eat it, I know you’re supposed to have the guts to admit what you’re eating. I don’t think it’s a reality people really want to face. (someone else) I’d be only be interested to know where the farm is (I 1:01:30)

I think someone like myself, who lives in Australia, I know what an Australian farm is like. But for someone from overseas, like China, I imagine that would be very useful for them. But it’s good to know where it’s from, that it’s not ‘poor quality’ in there (I 1:07:30)

I wouldn’t try and experience it in store. Knowing it has this AR (content) does not provide any incentive to want to buy it. Probably knowing it is Australian meat is a positive, as I am not sure many of them (dumplings) are (I 1:10:30)

I wouldn’t use the Zappar on this. You know how it says, want to visit an Australian Farm, I’m like, ‘whatever’ – I agree (from all group participants). It only needs to tell me ‘premium quality Australian Lamb’ and that’s all I need to know. I don’t want to feel bad that I’m killing that animal (II 1:01:30)

I'm not interested in visiting an Australian Farm, as then I would feel bad about eating the lambs (group agreement – all but one) (I 1:11:30)

AR Experience: The up-front experience was highly impressive, seeing the pack graphics clear, to be replaced by an animated dragon was felt to be particularly cool. Whilst the opportunity to visit a farm was not desirable in this instance, the ability to look around in 360 degree video, turning one's phone in different directions, was again felt to be pretty cool. Respondents said that whilst they would not be interested in exploring for themselves, they thought their teenage children (who are more interested in provenance) would get a lot out of it.

Some respondents found other content that was more appealing – a YouTube channel where there was a demonstration of how to prepare dumplings, which was felt to be relevant and interesting.

Oh, that's cool. That's a bit different isn't it (I 1:02:30)

Oh wow, it's making the dragon come to life (animated involvement across the whole group ...) this is pretty cool (being able to move the phone, to see in different directions (II 1:03:20)

There was more interacting with this one – which was great. It was more intriguing – what's going to happen, type of thing (II 1:08:20)

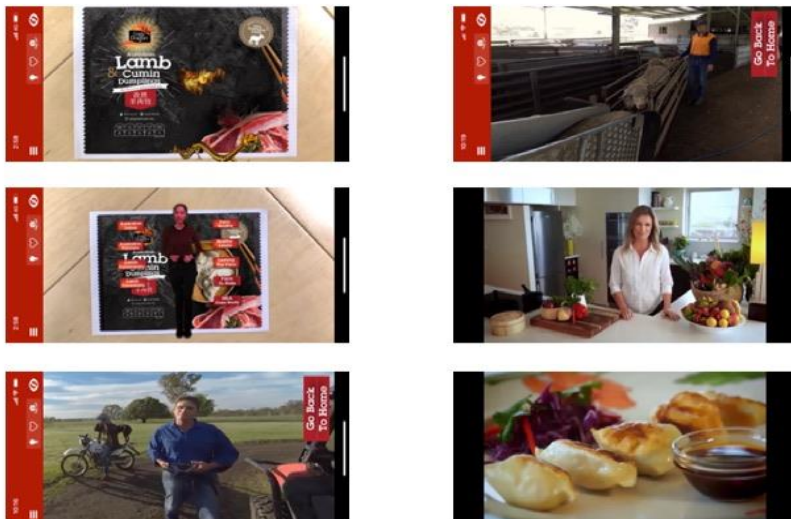
This one has like 8 different options, which was way too much for me (I 1:09:00)

I don't see the point of this – it's quite interesting to see the first time. But the actual message is really not that interesting to me (I 1:09:45)

It makes it look high-end, the lady cooking the dumplings, with all the ingredients laid out (I 1:17:00)

(Having seen the 3D farm, most people wanted to see how to cook and prepare them in different ways – what they were most interested in seeing) (II 1:07:00)

Platform for a Relationship: These particular respondents did not feel that this connection to the origins would provide any ongoing interest as a piece of content that did not otherwise represent that they wouldn't like to see a different story in AR.



If I got it home and had it there, it would be my kids who would give it a go. (I 1:19:45)

If I had already bought the product and got it home. If I had a bit of spare time, then maybe I would check it out. I think the kids would really enjoy seeing that (II 1:09:00)

The interactive experience is definitely more fun, than just following a video. It's maybe for entertainment, whilst you're waiting for them to cook. But you'd need to have the time (II 1:12:30)

Enhancing the AR experience / Respondents' own thoughts

Respondents felt that an AR experience could be more relevant to how they chose and prepared Frozen Dumplings, in the following way:

- Showing how the dumplings were made from real ingredients, the authentic way they are made or showing some sauces to compliment the flavours (i.e. would sweet chili work with lamb)
- For some, knowing there was a simple 'how to cook' would also be helpful – many are concerned when steaming something from frozen, as to whether it is cooked through
- There was little desire / expectation that the AR content could usefully be delivered in-store, as the freezer section is particularly challenging to navigate.

I think it would be more useful to know how quick they are to cook and how you can use them in different ways, would be far more useful. Click on here for the shopping list, of what else you need to prepare with them. (I 1:21:15)

I want something that is more relevant to me, rather than all about their brand. Show me how to make some great sauces to go with it, or how to cook it. (I 1:22:20)

I think most people would rather be naive as to exactly where their meat has come from. This sort of thing would probably get animal activists causing problems for these farmers. (I 1:23:00)

I think 10 to 15 seconds is the window they have got to engage you in-store (II 1:09:50)

A friend had the wine bottle one, with the cowboys and other characters on the front. But she did not do it in store, but waited until there was a bunch of us there and then she tried it, for all of us to see (II 1:11:00)

I like the idea of showing you the family on the farm, I wasn't expecting all that. It's good to know you're supporting Australian Farmers (II 1:13:30)

(What's the most useful thing they could be telling you?) How they make it. Also, how to prepare it. (II 1:13:50)

4.2.3 MVP#3: Jim's Jerky

Jerky Category Dynamics

Jerky fulfils a well-defined role in consumers' minds. Respondents said they have clear intent that they were going to be buying Jerky and were not liable to consider other categories (nuts, spice mixes) at this time. Whilst a few see it as being a good fit for all-day outdoor pursuits, most people either use it for personal evening snacking or for 'blokey' social occasions, where beer and sport are on the agenda. Some respondents commented that it was a good thing to take along, for this type of occasion. Consumers consider Jerky to be less unhealthy than most other snacks. This is an important consideration for some, who regret their snacking choices (stuffing their face with chips).

Jim's Jerky was not a known brand, but was thought to be credible, premium and distinguished by its appealing Aussie-ness. Many of the on-pack callouts were positively received – 'hand-crafted', 'high in protein' etc.

(How many of you enjoy Jerky?) Yes, I love it. Me too. I think it's yuk (I 1:23:45)

It says sourced here, made here, spiced here, packaged here, ... I think that's all really good (I 1:34:30)

The packaging looks premium. That bit about not eating in the shower, that's funny. (II 1:16:00)

Challenges & Pain Points associated with Jerky

- What makes Jim's Jerky different or better?
- Enhancing the social dynamic – making the usage experience more fun
- Conveying an engaging personality – as a snack, it is a fun and involving category
- Feel better about purchasing, compared to other types of snacks (other than nuts)

(what's it going to be like to eat?) The taste of Australia. It's crunchy. I'm not sure it is really crunchy. But it would make you buy it to find out if it really is crunchy. Yes, I'm curious on that. I'm imagining it to be like crispy bacon – that kind of texture (I 1:29:00)

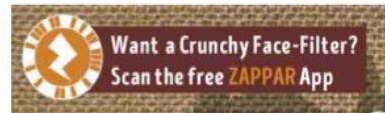
Jerky is soft and leathery. That's the whole point of it (I 1:29:40)

I know if I am going to get jerky, as a lot of the snacks in that area are high carb. Jerky is something I would be going to for protein. Only nuts fit into that criteria. It's quite different (female) (I 1:31:30)

For me it's a very impulse buy. It's not like a regular staple (I 1:31:55)

Reaction to AR Application

Motivating Call to Action: The idea of a Face Filter was well-recognised and thought to be relevant and appealing for Jerky. Respondents imagined that this would show them modifying their face, as they eat the product, in some humorous way. For novelty value, this was felt to be interesting and entertaining.



The idea that it was Crunchy (which is a new product differentiator from Jim's) was rather lost on people, with respondents not registering that Jerky could be 'Crunchy'. Some claimed the product felt no different, through the bag, others that jerky is inherently a chewy type offering. Further discussion about the texture led respondents to conclude that it was probably easier to eat than other types of jerky, which can be overly challenging.

I've no idea what a crunchy face filter is, but I'm quite curious. (someone else) A filter is where it changes your face (I 1:24:15)

A Facebook or Instagram filter. I think you open your mouth and jerky flies in. It looks like a bit of laugh, it would be good with beer, or something like that. It sounds fun & interesting (I 1:24:40)

Surely it doesn't really crunch like that does it? No (Someone else) (I 1:26:40)

A Crunchy Face Filter (small amount of laughs around the room). Don't eat in the shower, that's so weird (lots of laughs) (II 1:15:00)

My husband would definitely do that (Zap it), especially if the kids are next to him. Everyone uses face filters these days. Oh, that's cool, let me check it out. Face filters are fun for everyone, very entertaining (II 1:16:30)

AR Experience: Respondents really liked the Australian introduction. Respondents had a bit of fun interacting with the content, opening their mouth to eat some jerky. However, some missed the intro and so stared at their screen waiting for something to happen. The social / shared nature of the experience meant they soon caught on.

Respondents also engaged with the other dimensions to the app. Finding out more, by going to the Website was rewarding for consumers, as they were able to find out things about jerky that they didn't know. The 'suggest a flavour' was also thought to be appealing. The 'share to social' had the greatest potential for enhancing the fun. Many respondents commented that after a few beers, or for their teenage sons, it would become an entertaining diversion.



You're right – Ha! How funny (everyone has a bit of a laugh). I must say, if I open my mouth like that, I'd want to have had a few drinks (I 1:25:25)

It made you wanna try it though, coz you were like 'hey its not crunchy lets try it'. To make sure its not crunchy and then you try it and its yummy and you keep eating it (I 1:33:14)

(what else learnt about this product?) They have lots of different flavours. There's 250g of steak in a 100g pack (I 1:28:40)

You've got to open your mouth and then it shoves something in your mouth. Oh my goodness, my kids would love this (II 1:19:35)

'I must say, after opening my mouth like that now, I wanna eat some of it!' (I 1:26:39)

It's very silly. Fun, light-hearted. It fits the product well, you don't want to get too serious about jerky (II 1:20:00)

It took me a little while to realise what it does (needing to open mouth) I was expecting more of a filter on your face. But it was pretty quick, to get happening (II 1:21:00)

The kangaroo showed that it was an Australian product (II 1:21:40)

Platform for a Relationship: Respondents felt that the AR experience was a one-off, so would unlikely want to repeat. However, the product was well-liked and overall, they were left with a positive brand experience and thus likely to be one of their preferred brands. It's reasonable to assume that they would probably use the AR app again, if purchasing is only occasional. And they might use it more if they knew the face filter would be iterated/updated regularly.

It's a bit of fun. It might only last 10 seconds, but you'd share it on social media and its done. I wouldn't share it personally, but other people would, like my son, whose 20 years old (I 1:27:30)

(who wants to try it – we can just open one) Yes, great (all). I wonder if it tastes like Australia. (general agreement that tastes good, but not what they would call 'crunchy') (I 1:29:40)

Suggest a flavour, I loved that. When we visit a chocolate factory, that is what my kids most like to do. It feels interactive and like your contributing (one person only) (I 1:33:25)

For new brands that are trying to break into the market, that you don't know about, I think it's good. But I don't think I'd use it for an existing brand that I'm already buying – a trusted brand (I 1:37:10)
(what makes this jerky different?) It's from Australia. I like that its more humorous. It says that its high in protein, low fat, lots of flavours and tastes great. And crunchy (II 1:22:20)



Oh its crunchy? When I felt the pack, it did not feel like it was crunchy inside. But I'm not expecting it to be crunchy (II 1:23:20)

Enhancing the AR experience / Respondents' own thoughts

The promise of the AR Face Filter was something that respondents felt would enhance the usage occasion – for when they got the product home. Thus, it was motivating enough to sway choice vs. some of the known brands (i.e. Jack Links).

Whilst the suggestion that the jerky was crunchy was largely rejected, the AR app was easy to comprehend, felt to be a good fit for jerky, likely sway trial when considering purchasing jerky and could potentially build a relationship with the brand, bringing to life the humour and engaging personality (“don't eat in the shower” particularly resonated). Users weren't sure if they would download an app just for this, so this could be a good match for web-based AR that customers can activate in their Safari or Chrome browser.

I think it would be a better game if you had to move your head around the screen to catch the jerky in your mouth. Like the Simpson's episode where Homer is ... (I 1:27:00)

I'm not sure I would especially download the Zappar app, just so I could do this. I think it would need to be integrated into the Coles or Woolworth's app that I am already using. (I 1:35:30)

I think for kids snacks it would be great. I'm not sure for us, it's the same (I 1:38:30)

I can't see myself doing it in store. Maybe if I had the kids with me, it would keep them occupied. People would be saying, what is she doing (if I did it) (II 1:24:20)

My kids love snapchat filters, so they would love it. 2 minutes of entertainment (II 1:24:50)

Suggesting new flavours, I liked that. (II 1:25:20)

Some people who are really into jerky and like mucking around, they would share it (II 1:26:20)

4.2.4 MVP#4: Cleaver's Organic Beef Hotdogs

Fresh Meat Category Dynamics

When it comes to Hotdogs, most respondents felt they know how to use them and did not like to think too much about what went into them (ie parts of the animal). But kids young and old love them, and so they are embraced as an occasional meal, sports events or a as a favourite for kids' parties.

There was not felt to be a whole lot of choice, with the standard Coles or Woolworths branded offerings, as well as premium offerings like Cleavers. As an organic offering (Cleavers), it was felt to be made from superior meat, though did not change the fundamental nature of what went into the product.

Many of the mums with young children told how their shopping behaviour had changed since they'd had children. With a toddler and a baby, grocery shopping had become quite a challenge, having to time when one goes shopping to fit in with sleep patterns and kids being a handful when walking round the supermarket. Some had shifted to online grocery shopping, with inevitable top-up shops. Whilst others used catalogues, as a way to save money and pre-plan their grocery shop. Thus, they determined where they would shop and identified which items were must-buys – looking to make savings, with money being tight, on a single household income. Of course, if catalogue shopping and online shopping is popular, they are also potential activation-channels for AR as well as packaging.

On a broader level, respondents felt that organic meat primarily tasted better, which for an item like steak was a real positive. This same benefit, whilst relevant to hotdogs, was not such a strong motivator, with safety and health more of a concern.

The product looks good, its organic, which is better, but it's still a hotdog (I 1:41:25)

Knowing it is certified organic, you know it is good. In other countries, you're not so sure if it really is (ex-pat from the US) (I 1:45:40)

(how many of you buy organic meat – 5 of 8. Why?) The price gap is much closer than it used to be, like on the chickens. It's also the quality, I think it's got less water in it. I think the chicken tastes completely different. The beef too, I think the texture and the smell is completely different, like it hasn't been pumped with certain things, or processed in a certain way – I notice the difference in the texture and taste (I 1:46:30)

I would definitely get these, no added hormones (II 1:28:00)

The organic alone sells it for me. Maybe there are some people who would want to know and if so, they might look into it (II 1:29:15)

I do buy organic meat sometimes and I do find that it tastes better. Even though it is more expensive, the value and the quality are much better (II 1:41:00)

Challenges & Pain Points associated with Hot Dogs

- What *really* goes into a hot dog – most are too afraid to ask
- Justify the price premium for organic meat products
- Believe them to be safe and healthy for my kids – though dependent on whether they are a regular purchase vs. really only party food
- Jazz them up a little – whilst everyone knows the basics, it is always good, particularly for kids’ parties to make them more fun

When you buy hotdogs, you know they’re crap meat. Yes, these are organic, 86% beef, but they still haven’t told which parts of the animal (general laughter, in agreement). But the cows have been treated nicer (laughter) (I 1:45:00)

Yes, chicken is meant to be yellow, not white. We buy a whole organic, grass fed eye fillet and it tastes so good. Yes, you can taste it (I 1:47:30)

I place a lot of trust in this little logo (certified organic) that it’s the real thing. I’m not sure I want to know a lot more (I 1:48:15)

I think this is more relevant, telling me where organic comes from (than with the dumplings). If you are buying organic meat then you are being more conscientious, so it is good to know a lot more about what is going on behind the scenes (II 1:30:15)

Reaction to AR Application



Motivating Call to Action: The Call-To-Action of ‘Unlocking the Mystery of Meat’ did not resonate, the ‘mystery’ deemed as being a stretch – although it did get the participant’s attention. It was felt that this referred to ‘what were the actual ingredients’ that went into a hotdog. However, there was certainly a broader interest in better understanding of what organic farming actually is.

Unlock the mystery of meat, I'm not sure how I feel about that (general derisory laughter). That's why I started laughing, some mysteries are better left as mysteries, particularly for hotdogs
(I 1:41:10)

I would like to be able to scan stuff in the store, just quickly, and then look at it properly when I got home, without necessarily having to buy it (II 1:31:40)

Given it is a fair bit more expensive, when you got home you might want to do some research to find out a bit more, to reassure yourself (II 1:32:20)

AR Experience: The introduction, with the 'mother' talking about why she chooses organic meat resonated with the other mothers in the research, providing a platform for further engagement. Though the AR experience was less immersive and entertaining than the other examples, it was felt to be relevant and interesting. Most followed the video that explained about the hotdogs. Whilst respondents believed the superior quality story that is organic, and the high 'meat' content', they were frustrated that they still did not know what actually went into a hotdog.

Others found it valuable to be able to hear from the organic farmers. Many respondents were drawn to the Pete Evans video content, as a way to prepare hotdogs in an interesting way.

The Instagram has got before and after photos of the cows – like alive and dead (I 1:43:20)

It makes farming look glorious and it's not glorious. It's green and lush, where's the drought
(I 1:44:30)

I expected them to show me the actual mystery of how they make hotdogs, but it was just a whole lot of people telling me they like them. So, there wasn't really a mystery that they unlocked. I thought they were going to tell us which parts of the meat they use. But I did look at the list of ingredients and that impressed me. It is mostly beef, if does not have a tonne of sugar (I 1:50:30)

Wow that's pretty cool, showing you those recipes (II 1:33:50)

To begin with, there was just a mum and a child. I can't remember what she said though. It was quite difficult to see it. The gist of it, was that she was inspired, bought it for her little boy and it had good quality ingredients (II 1:35:50)

I liked the Instagram link. It showed you the meat, the cows, other products that they sell
(II 1:37:40)

I saw Pete Evans, so I just went there. But at the same time, there is no mystery about how to cook a hotdog (II 1:38:10)

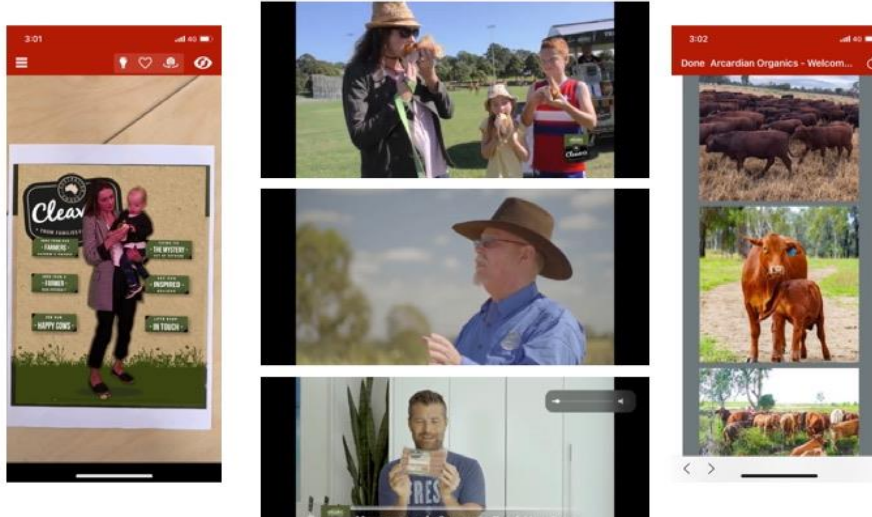
Platform for a Relationship: Many respondents had bought organic meat in the past, though mostly on an occasional basis, when seeking superior taste. When it was pointed out that this content was already available to them, on Cleaver's website, many commented that the AR application had made it far more accessible and created a desire to explore it, via the packaging.

Maybe it's a male thing. You're hungry, you just eat it. You don't want to get too involved about what's on your plate. If it tastes good and does the job, then I'm happy (I 1:44:30)

I can show you as many organic farms as you want, but it does not mean that it has come from the organic farm that I have just shown you. They are all different (I 1:50:10)

I'm not sure it's adding anything for me personally. Its more putting me off. Showing the animals is going too far, showing the farms is good, but I'm not sure if I care (I 1:51:20)

There's nothing in this one, for me, other than knowledge and I just don't care (I 1:52:40)



I like how they tell you it is better for the environment. You build up a bit of confidence that it is a better product. Especially now you hear these stories about global warming, it's good that they are trying to do something to tackle that (II 1:38:30)

If I could take a photo in-store, because I'm not going to look into it now, then I can look at it properly later (II 1:39:00)

If it was a 15 second, then how to cook and what to serve it with, would be great. For me, it would be some very quick information, to back up that it is organic, though I'm not sure what that would need to be. Maybe that they've had a happy life, not treated poorly (II 1:39:40)

The idea that you're meeting the farmer is good. To know that you are supporting another Australian family (II 1:41:30)

Enhancing the AR experience / Respondents' own thoughts

Respondents generally felt, that though not entertaining, the content worked well to inform them about the merits of organic meat. Many still felt that they still did not know what went into a hotdog, with the idea that it was organic 'meat', being obvious. However, the overall impression of superior quality and the realization that they probably didn't want to know the exact details.

Where the target consumer, new mums, particularly felt they would like to be able to engage with the AR content more readily, reflected their changing grocery shopping dynamic. Some felt that being able to access the AR app via the Coles or Woolworth's catalogue would enable them to justify

the price premium of organic, whilst they were researching their grocery shop, in the comfort of their kitchen table. These consumers are already considering buying organic meat, so would likely respond positively, if given the opportunity to find out more from the packaging.

I'd be more interested to know where on the cow it comes from. Just don't show me on a live, real one, show me on a cartoon one. Like the Meat & Wine co. (steak restaurant), that's a whole experience, but when I am supermarket shopping, I'm just not interested (I 1:53:20)

Hotdogs are for kids. There are all sorts of cool things you can do with hotdogs, like sticking spaghetti through them, makes them fun. (I 1:56:00)

4.2.5 Summary of overall reaction / feedback, at the end of seeing all the AR Apps

Jim's Jerky was seen as being a bit of fun and a great platform to introducing them to the brand, from which point, many felt it would become their favourite (Australian-ness, personality, flavours) Respondents were most excited by what the lamb shanks app promised (in their eyes). They felt that the other apps were 'telling you' things, that you might or might not want to know. But the lamb shanks one certainly had the greatest potential to help you in your daily life.

Meat is the key ingredient. If I've got this, then I can do all of these things. Like Zap it for 16 ways to eat it tonight. That would be good, that would be helpful (I 1:56:30)

I think the first one, was on the right track, showing that meal. If it showed that and then you could flick through and it showed cous cous – oh that does look good. That would be good (I 1:55:40)

If that Zappar thing wasn't there, I would not have even thought to go to their website, to find these things out. It's not going to help sell the product, when you are in the store, but is useful when you get it home (II 1:41:45)

(which ones help you, when shopping?) The lamb one. It is simple and tells you how to cook it (II 1:43:00)

If it can learn and adapt the content to what is most relevant to you, then that would be really good. So, if someone is mostly interested in getting recipe ideas when shopping, then being able to get that quickly and easily, would be great. (II 1:46:30)

It would be great to do your research, when you're at home, before you get to the shop. Like using the Coles catalogue for this (Augmented Reality), would be a great idea (II 1:49:10)

5. CONCLUSIONS

Mobile Augmented reality is certainly becoming a fast-growing trend in consumer culture and many vendors are taking it upon themselves to create content and activate AR, to have a direct retail conversation with the consumer, receive first party data and bridge the divide between the digital and physical worlds. This Research Trial, funded by the MLA, with content built by Australian company Virtual Method on the Zappar AR platform, has raised some compelling considerations about the use of AR to promote Meat & Livestock products both domestically and in a highly desirable export market such as China or the US. While consumers are not yet used to AR as a next-generation interface, once they do engage, the AR undoubtedly becomes (at the very least) a conversation point and *hook* for wanting to discover more about a brand.

Creating awareness and an effective Call-To-Action will be key in the proper, commercial at-SKU retail setting that was beyond the scope of this trial, and it would also be very interesting to see this kind of activation more targeted towards the Asian consumer that is likely to be more of a mobile-centric digital native as so much in retail is done on mobile in Asia (payments, couponing, social-sharing of food-related experiences etc).

In just this limited Trial, we have uncovered strong evidence of the appetite of everyday consumers for mobile AR. It may not be used so much at retail POS, but more so as an off-premise extension to the brand to cause greater mindshare, increase loyalty and purchase frequency upon return to the retail environment. And it means the consumer supplies the hardware, no need for screens or traditional digital at-retail.

The Meat and Livestock industry (and other primary producers in this country) have great stories to tell, and some have already begun by using traditional websites and YouTube Channels. Mobile Augmented Reality however, brings that content and the product itself to a convergence and delivers very powerful consumer data insights at the same time. The next step is simply for the industry itself to start the journey towards interactive packaging and adding virtual value to quality Australian-made red meat.

6. REFERENCES

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