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FAMILY INSIGHTS
GROUP LIMITED

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FRUGL APP
NOVEMBER 2019

Lower Prices & Healthier Options

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Lower Prices & Healthier Options

Frugl aggregates grocery product and pricing data in **real time** to provide shoppers with the lowest prices as well as health & nutritional information across Australia's leading supermarkets to help shoppers make informed decisions for their families well-being.

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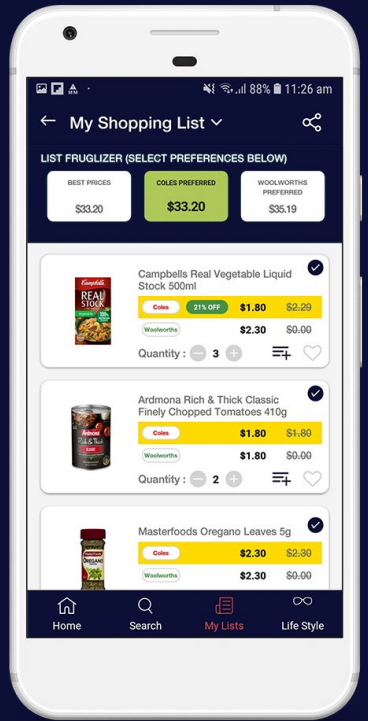

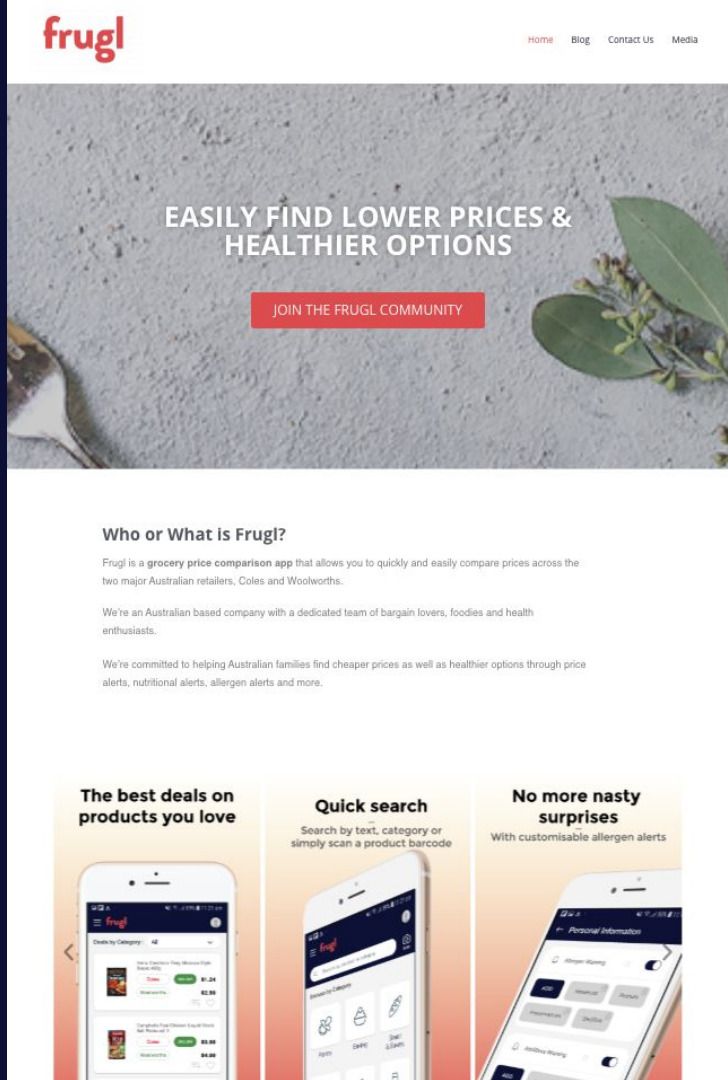

https://vimeo.com/367911850

Customers want good value & healthy options

“In a UK survey of grocery shoppers, millennials said they seek healthier food choices. They also want to know exactly where their food comes from and how it’s made; they expect companies to be socially responsible and to offer sustainable, traceable products. At the same time, they want deals and discounts.”

- McKinsey & Company, Dec 2018

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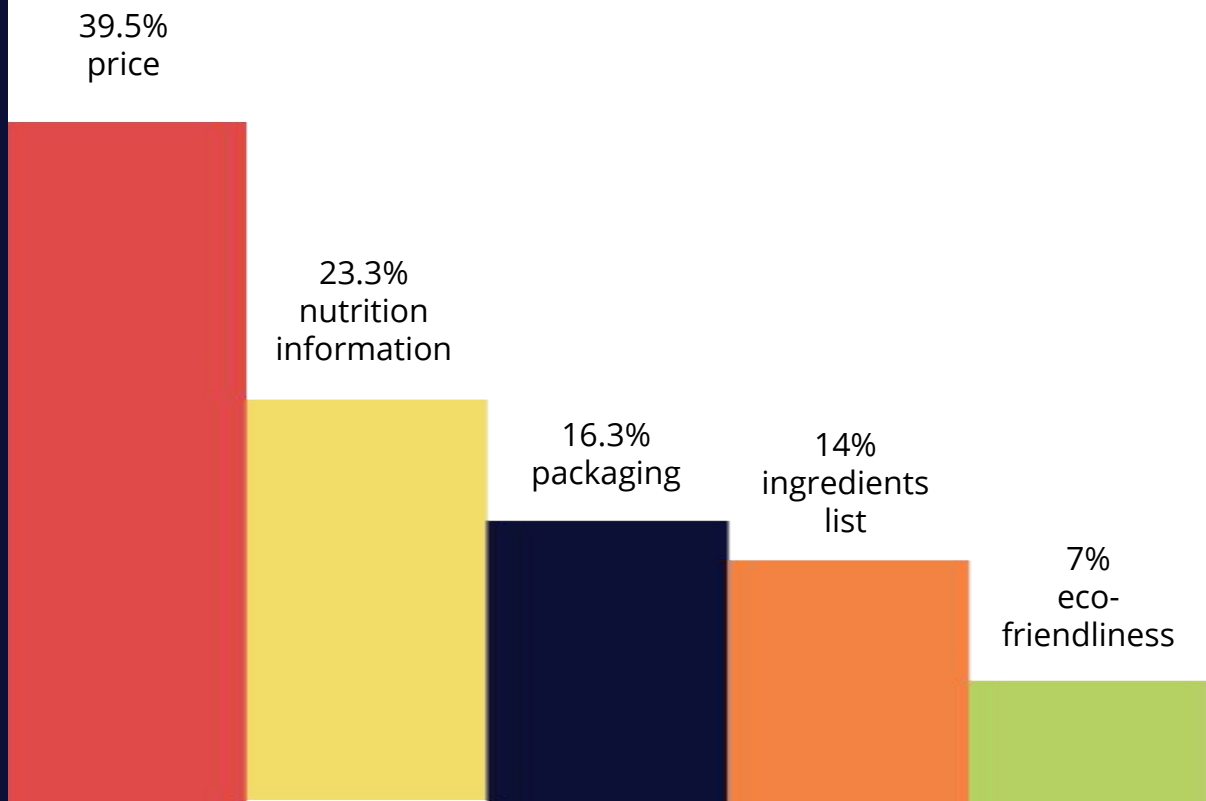
Purchase Decision Criteria



Grocery Apps & Retail Analytics

instacart

US grocery shopping and delivery app

Market value: ~US$8Bn

flipp

Grocery promotions aggregator and shopping list app

50m+ downloads in Canada and US

Numerator

Retail intelligence and data analytics (using apps to gather sales data)

US$1.2B annual recurring revenue (2019)

Woolworths

1M+ downloads

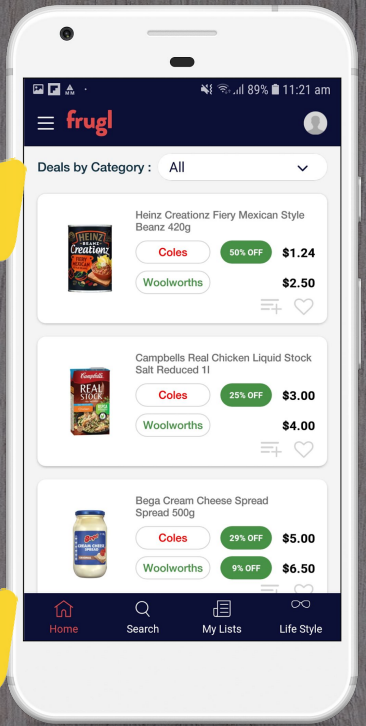
coles

1M+ downloads

ALDI

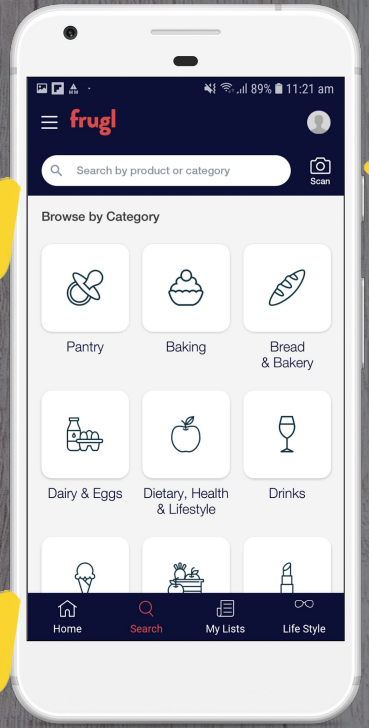
500k+ downloads

Frugl App - Deals, Search & Scan



Search deals by category

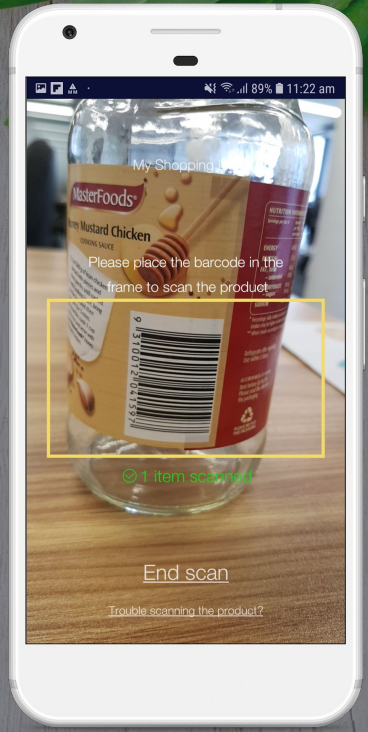
Personalised deals



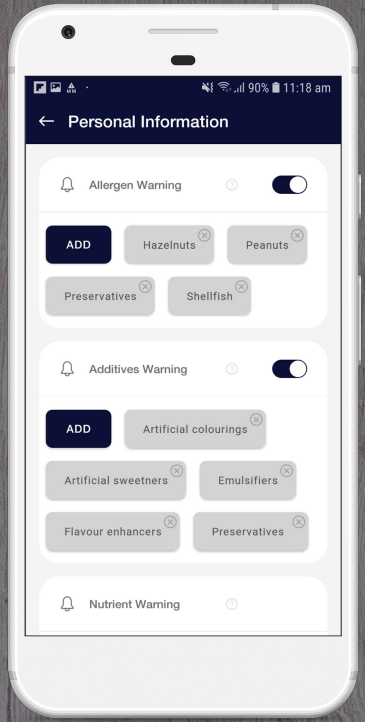
Predictive text search

Search by category

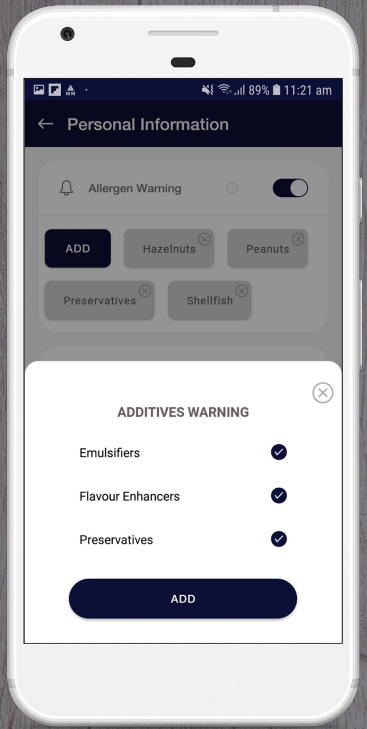
Search by scanning an item



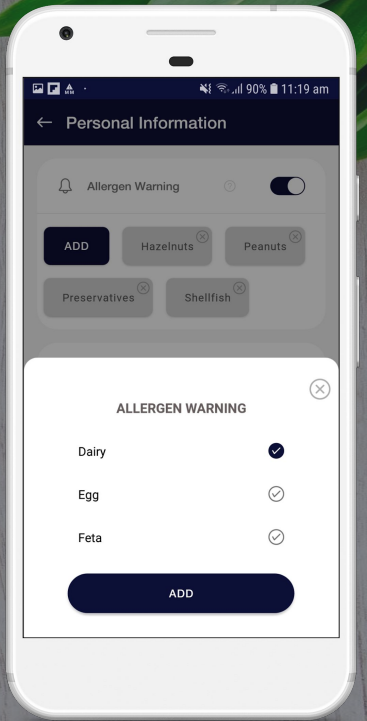
Frugl App - Health Profiling



Customisable maximum daily RDI% preference



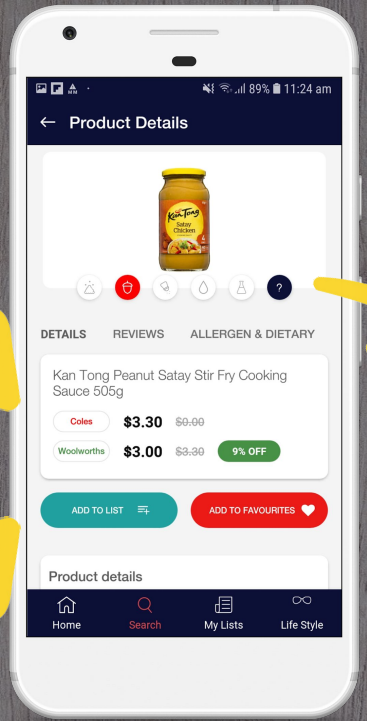
Customisable ingredient filters alert consumers to the presence of specific additives in grocery items



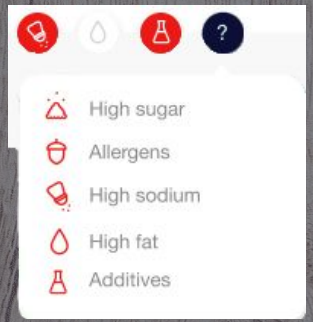
Allergen filters alert consumers to the presence of allergens or ingredients in grocery items

Frugl App - Product Information

Compare Coles & Woolworths Pricing



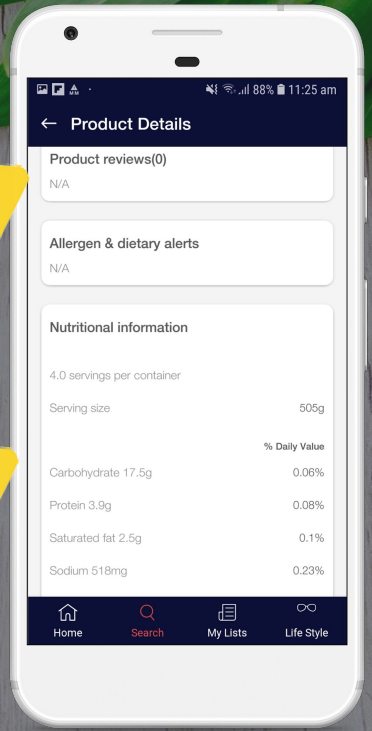
Add to list or favourite



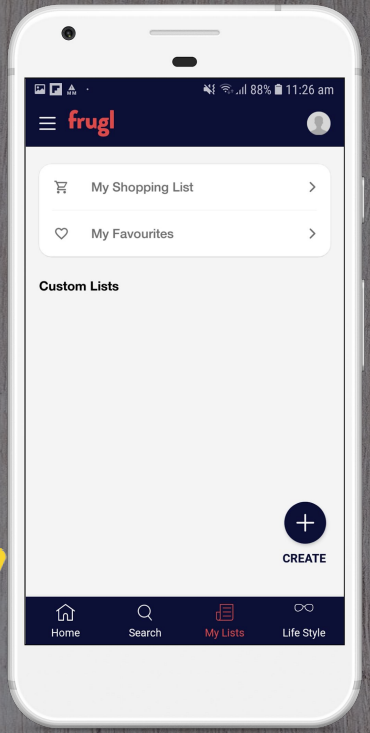
Allergen & ingredient alerts

User generated reviews

Nutritional information

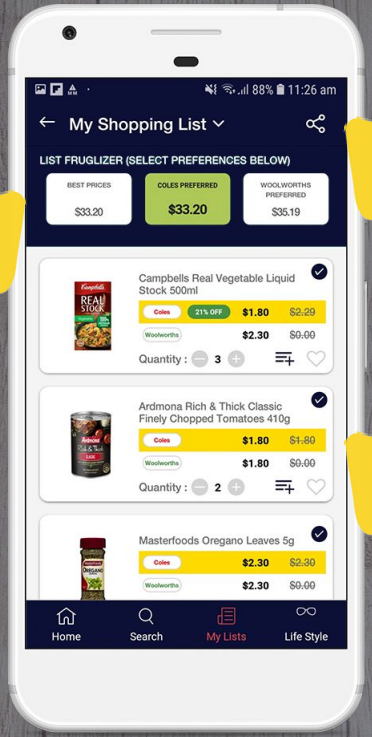


Frugl App - Shopping Lists, Fruglizer & Lifestyle



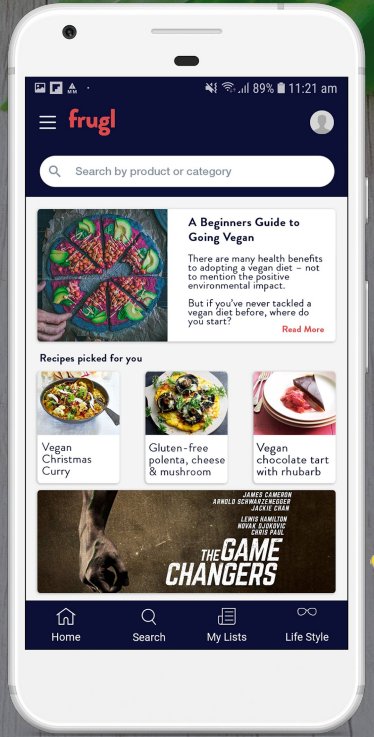
Custom lists & favourite products

Optimise total list price by **Best Price** or **Preferred Store**



Share your list

Preferred products selected



Blog updates, personalised recipes, advertising and more

Frugl App Roadmap

User Health Profiles
- Select Diet Profile (eg Vegan, FODMAP, Celiac, Pescatarian, Keto)
- Family Member Health Profiles

In Store Basket List
- Scan to Add
- Running Total
- Alerts & Warnings
- Recommended alternatives
- Transactional capability

Filter Enhancements
- By Ingredients
- By Origin
- By Sustainability
- By Diet
- By Heath Profile

Designer Shopping Lists
- Diet Starter Packs
- New Products
- Diet-Specific Favourites
- Featured Healthy Products
- Sponsored Product List

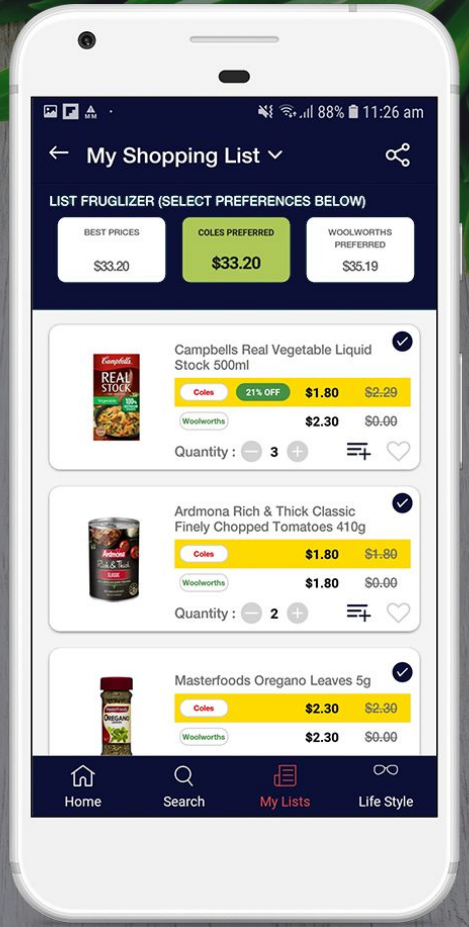
Content & Engagement
- Feature Stories
- News & Insights from the data team
- Recipes & ingredient lists
- Share functions across all features

Customer Analytics Panels
- Product Price History trends
- List Total Price trends
- Health Index trends
- Retailer Price trends

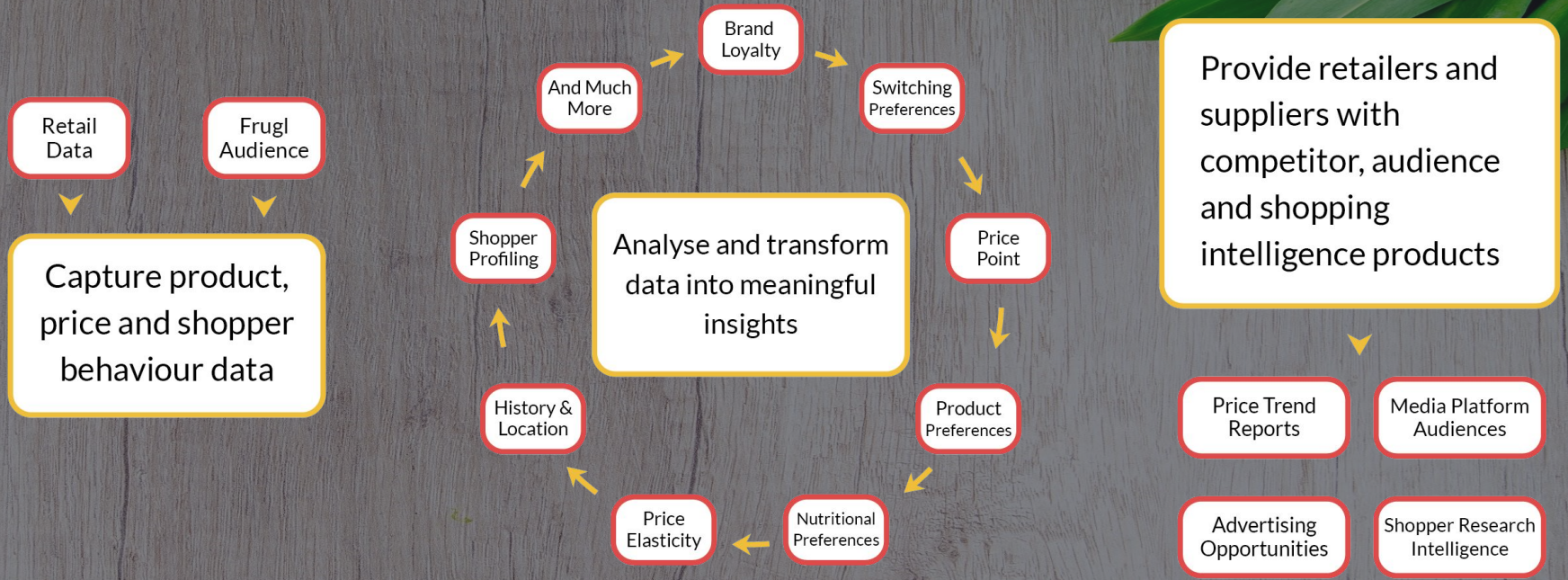
Recommendations
- Enhanced product matching capabilities
- Alternatives by price optimisation
- Alternatives by health/diet recommendations

Sharing Functionality
- Share My Lists
- Share My Recipes
- Share My Reviews - Share My Savings
- Share Product Comparisons
- Share Deals

Expansion Planning
- Retailer addition (eg Amazon, Aldi, IGA, Kaufland, Lidl)
- Category expansion (liquor as initial expansion vertical)
- International expansion (eg UK, SG, US, NZ)

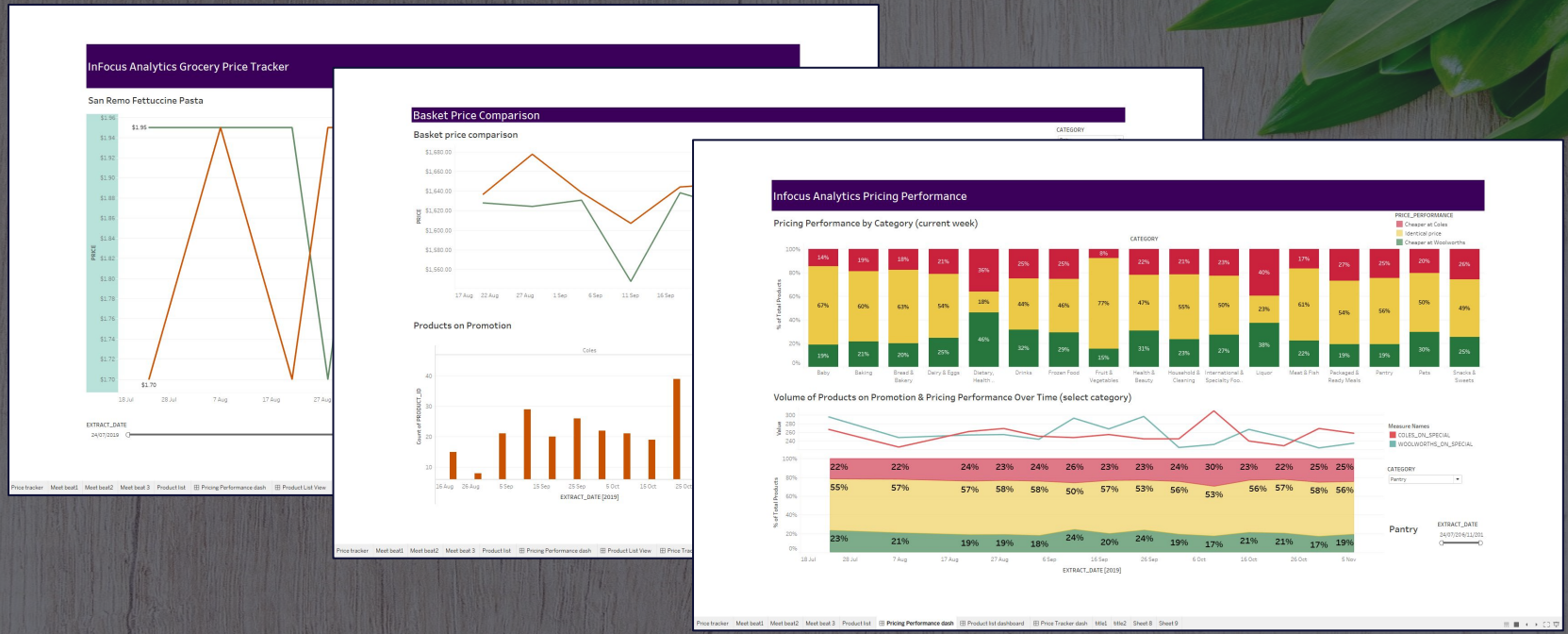


Frugl Data Enrichment Model



Frugl acquires 1st party audience data and retail product/price data. Combined, these datasets offer rich opportunities to analyse and understand consumer behaviour and retail pricing strategies.

Retail Analytics



Retailers and brands want to understand the end to end shopper journey and utilise behavioural insights to influence “pre-purchase” buying decisions and inform long-term product and price strategy planning.

Frugl Revenue Models

Revenue Model	Methodology	Solutions	Potential	Market
1. Retail Product, Price & Promotion Analytics Target Market: Supermarket retailers & suppliers	**Data Analysis** • Interrogation of product & pricing data • Revealing key insights & trends	**Business Intelligence Solution** • High quality data • Frequent extracts • Broad range of retailers	**Client Subscription** • 5 major supermarket retailers • 2,000 potential suppliers	AU data analytics market > $1 Billion Future potential: Revenue growth from multiple B2B subscribers
2. Shopper Panel Research Target Market: Supermarket retailers & suppliers	**User Opt-In to Research Panel** • Panel membership incentivised through rewards	**Data Driven Shopper Segmentation** • App user behaviour & user profile data used to create a multitude of consumer segments for targeted research by retailers & suppliers	**Panels Engaged for Shopper Research** • 5 major supermarket retailers • 2,000 potential suppliers • Market research agencies	AU market research industry > $3.1 Billion Future potential: Revenue generation leveraging large Frugl app user base
3. In-app Merchandising & Advertising Target Market: Retailers & Media Agencies	**User Data Captured for Analysis** • Segments created based on user behaviour • Advertisers can target specific segments for improved ROI	**Merchandising Space Built in to App** • In-app merchandising space created at key points in the user journey	**Retailers and Brands Buy In-App Ad Slots** • 5 major supermarket retailers • 2,000 potential suppliers • Non-grocery advertisers	AU digital ad spend $8.8 Billion Future potential: Revenue generation leveraging large Frugl app user base
4. Data Enrichment & Online Advertising Target Market: Digital Media Agencies & Digital Advertisers	**Develop Profile Data For App Users** Capture & segment by: • Demographics • Purchase behaviour • Purchase intent • General interests	**Establish user Data as 2nd/3rd Party Source** Aggregate & anonymise data for: • Data aggregators • DMP • Data partnerships • Data exchanges	**Data Activated on Digital Ad Platforms** • Unique Frugl user data user to enrich online audience profiles • Revenue generated when Frugl segments are used for targeted digital ad campaigns	AU data spend in 2019 $485 Million Future potential: Share of digital advertising revenue

Commercial Strategy Summary

	F20 Q1 - Q2	F20 Q3 - Q4	F21 Q1 - Q2	F21 Q3 - Q4
Audience Creation Enhancing the well-being of families with technology solutions to grow audiences & app usage for behavioural data collection.	**Frugl Launch**	**Grow Frugl Audience**	**Engage & Scale Audience**	**Develop new Verticals & Territories**
Data Acquisition & Analysis Generating large commercially attractive data sets for analysis, enrichment and commercial product creation.	**Pricing & product data**	**User behaviour data**	**Transactional data**	**Additional product vertical data**
Commercial Generation of multiple analysis-enhanced data products for retailers, brands and media agencies.	**Retail & promotional analytics**	**Audience research & analytics**	**In-app merchandising & advertising**	**Audience data enrichment & advertising**

Key Management

SEAN SMITH
CHIEF EXECUTIVE OFFICER

Sean’s broad expertise includes marketing, general management, retail, customer experience and data strategy.

His experience includes executive roles with Woolworths, Dimmi, Orbitz Worldworide and Ticketek.

ALISTAIR MCCALL
CHIEF DATA OFFICER

Data analytics and strategy professional with over 18 years experience commercialising data with major brands and agencies including the Woolworths Group, MercerBell and Vodafone.

JON WILD
CHAIRMAN

Jon has led marketing strategy from start-ups to multinationals, including Unilever, British Telecom, O2, Telstra and Orbitz Worldwide. He is currently consulting to early stage online AU businesses.

MAT WALKER
NON-EXECUTIVE DIRECTOR

Mat is an entrepreneur with extensive experience in the management of public and private companies. In a career spanning three decades, he has served as Executive Chairman or Managing Director for public companies with operations globally.

Corporate Snapshot

	Shares (ASX:FAM)	Options [1] (ASX:FAMO)
Current Issued Capital	50,000,000	23,048,883
FGL Acquisition Consideration [2]	-	-
Proposed Placement Shares	20,000,000	
Total	**70,000,000**	**23,048,883**

Current Market Capitalisation ($0.072) [3]	$3,600,000
Current T20 Shares Held	62.74%
Proposed Market Capitalisation ($0.0625) [4]	$4,375,000

1 Quoted Options are exercisable @ $0.50 on or before 30 June 2021
2 Up to 40,000,000 shares may be issued subject to the achievement of revenue based performance
3 Calculated by multiplying the last traded price of the Company's ordinary securities quoted on ASX by the number of ordinary securities currently on issue
4 Calculated by multiplying the Placement Offer Price of the Company's ordinary securities quoted on ASX by the number of ordinary securities currently and proposed to be on issue

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Sources

Slide 13: Estimated based on 2017 Gartner report

https://www.technologydecisions.com.au/content/it-management/news/australian-bi-market-set-to-grow-13-4-this-year-1100043660

Slide 14: OnAudience.com

https://www.onaudience.com/files/OnAudience.com_Global_Data_Market_Size_2017-2019.pdf?utm_source=websitesection&utm_medium=email&utm_campaign=raport_data_popup

Slide 16: IbisWorld Industry report

https://www.ibisworld.com.au/industry-trends/market-research-reports/professional-scientific-technical-services/market-research-statistical-services.html

Slide 15: IAB Australia

https://www.iabaustralia.com.au/research-and-resources/research-resources/item/12-research-and-resource/2749-entire-australian-advertising-market-cy2018

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THANK YOU

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