WHAT AUSSIE MUMS ARE SAYING
MARKET RESEARCH FROM OUR SMASH LAB

WHAT ARE SOME OF THE PROBLEMS OR CONCERNS YOU HAVE
WITH TODAY’S PLASTIC LUNCHBOXES?

• They’re mostly one compartment making it harder to pack ‘nude’, will cross contaminate food
• Lost lids make the item unusable
• They won’t fit big items like bananas, which then have to be carried separately
• Hard to clean - small crevices in lunchboxes hard to reach
• Is not dishwasher safe or wont fit into the dishwasher
• Most don’t come with an insulated cover to keep lunches cool and/or protect the container from breakage
• Hard to open for little children
• Hard to keep clean, mould and grime often forming in seams – becomes smelly over time due to this
• Most are not compartmentalised making it hard to separate food content and pack ‘nude’
• The wear and tear of the schoolyard make this a yearly, or twice yearly purchase
• They often crush the lunch when packed alongside heavy books and media devices

MARKET RESEARCH FROM OUR SMASH LAB
CONDUCTED: MARCH 2014
RESPONDENTS: SMASH LAB MEMBERS
NO. RESPONDENTS: 166 ADULTS / 350 KIDS IN TOTAL

WHAT ARE SOME OF THE PROBLEMS OR CONCERNS YOU HAVE
WITH TODAY’S PLASTIC LUNCHBAGS?

• Most don’t come with an insulated cover to keep lunches cool and/or protect the container from breakage
• Hard to open for little children

• Hard to clean - small crevices in lunchboxes hard to reach
• Is not dishwasher safe or wont fit into the dishwasher
• No area for a freeze block or the freeze block touches the food
• The wear and tear of the schoolyard make this a yearly, or twice yearly purchase
• They often crush the lunch when packed alongside heavy books and media devices
THE OVERALL LUNCHBOX MARKET

<table>
<thead>
<tr>
<th>SEGMENT</th>
<th>MALE</th>
<th>FEMALE</th>
<th>TOTAL</th>
<th>% OF POPULATION</th>
<th>GROWTH DECLINE</th>
</tr>
</thead>
<tbody>
<tr>
<td>KINDER 0-4</td>
<td>809,550 (3.50%)</td>
<td>751,725 (3.50%)</td>
<td>1,561,275</td>
<td>(6.75%)</td>
<td>28,600</td>
</tr>
<tr>
<td>JUNIOR 5-9</td>
<td>751,725 (3.25%)</td>
<td>693,900 (3.525%)</td>
<td>1,449,625</td>
<td>(6.25%)</td>
<td>36,100</td>
</tr>
<tr>
<td>TWEENS 10-14</td>
<td>693,900 (3%)</td>
<td>693,900 (3%)</td>
<td>1,387,800</td>
<td>(6.00%)</td>
<td>6,900</td>
</tr>
<tr>
<td>TEENS 15-19</td>
<td>809,550 (3.50%)</td>
<td>751,725 (3.50%)</td>
<td>1,561,275</td>
<td>(6.75%)</td>
<td>-1.25%</td>
</tr>
<tr>
<td>ADULT 18+</td>
<td>NA</td>
<td>NA</td>
<td>11,531,600</td>
<td>(49.00%)</td>
<td>-0.80%</td>
</tr>
</tbody>
</table>

LUNCH BOX USAGE

- 28% PLASTIC LUNCHBOX
- 13% INSULATED WITH PLASTIC
- 5% DON'T USE ONE
- 53% SOFT INSULATED
- 1% PAPER BAG

HOW LUNCHBOXES CHANGE WITH AGE

- FREEZE BLOCKS NOT REQUIRED FOR KINDER AS LUNCH IS PUT INTO FRIDGE
- MORE LUNCH BREAKS IN THE DAY FOR PRIMARY/SECONDARY
  THEREFORE MORE FOOD REQUIRED
  THEREFORE LARGER LUNCHBOX REQUIRED
- OLDER KIDS
  MORE HAPPY TO TAKE LEFTOVERS
  AND NOT AS MUCH SANDWICHES
  THEREFORE TYPE AND SHAPE OF CONTAINERS CHANGE
- OLDER CHILDREN
  WANTS:
  Less design application
  Move away from baby prints
  USES:
  Smaller Containers
  HIGHER INCIDENCE OF SMALLER CONTAINERS FOR OLDER CHILDREN VS KINDER
  As the parents more confident the child can open, they need more snacks for the additional lunch break, plus pressures of nude food

LUNCHBOX PURCHASE FREQUENCY

1 PER YEAR 50%
2 PER YEAR 24%
3 PER YEAR 1%
4 PER YEAR 2%
ONCE EVERY 2 YEARS 23%

? Do you pack a cool or freeze product with your child or children’s lunch such as a freeze brick?

- YES ALWAYS: 31%
- YES, BUT ONLY FOR THE HOTTER MONTHS: 52%
- NO, DON'T REALLY WORRY: 10%
- NO, I PACK DIFFERENT FOODS FOR THE WARMER MONTHS: 8%

? When looking to buy a lunchbox, is it important to have the bottle attached in some manner to the lunchbox or lunchbag?

- YES: 18%
- NO: 52%
- DON'T CARE: 30%

? Do you currently pack rubbish free or nude food lunches for any of your children?

- YES, MOST DAYS: 66%
- ONLY ON NUDE FOOD DAYS: 9%
- NO: 25%
IT’S TIME TO LIFT THE LID ON SMASH’S NEW REVOLUTION IN LUNCHBOXES!

WE’VE COMBINED
Australia’s number one lunchbox and
One of our most popular insulated shapes

TO CREATE
The greatest innovation in school lunches!
And the best part is, one size, fits all!

IT’S A REVOLUTION
IT REDEFINES INSULATED LUNCH
IT’S INNOVATION FUSED WITH FUNCTIONALITY

SMASH BOX!

THE ALL-IN-ONE LUNCHBOX MADE TO AUSSIE SPECIFICATIONS!

AS YOU CAN SEE, IT IS THE SAME SIZE AS THE TWIN CASE, AND SLIGHTLY TALLER AND SHORTER IN LENGTH THAN THE NUDE FOOD LUNCHBOX

INTERNAL DIVIDERS
Help secure food and provide more compartments within

CARRY HANDLE
Easy to carry
PRODUCT DETAILS

We’ve taken one of SMASH’s popular insulated twin case and given it a makeover! And the best part is, one size, fits all!

COMPARTMENTALISED
Smaller section for lunch and recess
Larger section holds lunches like sandwiches and fruit

UNBREAKABLE
Rigid container stops food from getting squashed and won’t break if accidentally dropped

LEAK PROOF PODS
Air tight plastic containers included for wet items like yogurt or chopped fruit

HINGED LIDS
No lost lids rendering it unusable.
Removable for easy cleaning

ROOMY
Sized for large bulky items like yogurt or bananas.
Approximately 85% of the Smash Lab Respondents felt this is the perfect size!

FREEZING!
Freeze sheets can be housed between the fabric shell and under the plastic container, and won’t make food soggy

INSULATED
In the side and bottom casing

EASY TO CLEAN
Simply remove the casing and wipe clean, no mould, no fuss

CLIPS
Easy to use clips secure the outer case to the inner container

FUSES FASHION AND FUNCTIONALITY
Allows fashion application for user individuality

USE ON IT’S OWN!
Don’t need to insulate today? Feel free to take off my jacket and go solo
DRESS UP YOUR LUNCH

Unlike other lunchboxes, the smashbox allows you to dress up your lunch with the latest designs from smash.

This provides individualization for the end user and allows a fashion element which has strong appeal to the kids.

Go crazy with fashion or simply colour block for mass-market interest.

MATCH DESIGNS INTO YOUR INSULATED SELECTION!

COLOUR TECH GIRL

GELATI GIRL

COLOUR TECH BOY

MIGHTY BOY
THE VERDICT?
WHAT MUMS THINK OF THE SMASHBOX

CONDUCTED: AUGUST 2014
RESPONDENTS: SMASH LAB MEMBERS
NO. RESPONDENTS: 175 ADULTS / 404 KIDS IN TOTAL

What age group do you think this best suits?

5–10 YEARS
PRIMARY SCHOOL AGE

WHY?

1ST TWO YEARS AT SCHOOL REQUIRE SEPARATE CONTAINERS FOR THE SEPARATE LUNCH BREAKS

NEED TO BE BIT OLDER TO MANAGE HINGES THEMSELVES

TWIN CASE SUITS THE YOUNGER KIDS WHO DON’T KNOW HOW TO FIND THINGS PROPERLY

OLDER KIDS (AFTER 10) WILL HAVE OUTGROWN THIS FORMAT

TOO BIG FOR OLDER KIDS WITH THEIR COMPUTER/BOOKS

How you would pack the lunch inside the SMASHBOX.
Would you:

PACK FOOD INTO SMALLER CONTAINERS INSIDE LUNCHBOX 33%

PACK FOOD IN CLING WRAP/FOIL/SANDWICH BAGS INSIDE LUNCHBOX 36%

PACK FOOD WITHOUT WRAP OR PACKAGING IN LUNCHBOX 31%

Would you like to see dividers / sections in the SMASHBOX?

63% YES

37% NO

Is the SMASHBOX the right size?

85% FELT THIS WAS THE PERFECT SIZE

What is the value perception of this product?

LUNCHBOX + INSULATED BAG = $24.95 MAXIMUM

How much would you expect to pay for the SMASHBOX?

49% OF RESPONDENTS SELECTED $10–$15

SMASHBOX FEATURES
MOST IMPORTANT FEATURES RANKED

1. BIG ENOUGH TO KEEP FOOD ALL TOGETHER
2. INSULATED TO KEEP FOOD COOL
3. EASY TO CLEAN: NO RISK OF MOULD
4. EASY TO OPEN CLIPS
5. WON'T BREAK OR DENT IF ACCIDENTLY DROPPED
6. RIGID CONTAINERS: STOPS FOOD GETTING SQUISHED
7. COMES WITH A FREEZE BLOCK
8. INDIVIDUAL PLASTIC CONTAINERS TO STORE YOGURT
9. BRIGHT DESIGNS YOUR CHILD WITH LOVE

WOULD YOU BUY THIS PRODUCT?

This is a really good Top Box result
(Remembering we ideally want to see at 35–40% in Top Box)

38% EXTREMELY INTERESTED

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BRANDING & PACKAGING

PRELIMINARY PACKAGING CONCEPT

FORMAT: CARD WRAP
COMMUNICATION

TARGET MARKET

PARENTS
PRIMARY MARKET
MAIN GROCERY BUYER WITH SCHOOL Aged KIDS
AVERAGE AGE: 32 – 45
APPROX. 2.3 MIL MUMS IN AUSTRALIA

SCHOOL AGED CHILDREN
SECONDARY MARKET
GEN ALPHA TO TWEEN Aged CHILDREN
FROM 5 YEARS TO 10 YEARS OLD
PARENT’S BIGGEST INFLUENCER ON PURCHASE DECISIONS

COMMUNICATION CHANNELS

PRINT
- Press ads mirroring Outdoor Ad content in parenting and kids mags
- Full-page ads across multiple magazines
- Provides another reminder and increases viewer frequency

OUTDOOR ADVERTISING
- Approx 100 Shopperscape Panels
- Locations around key shopping areas
- Provide a reminder at point of purpose
- Reinforce print advertising through frequency of messaging

PUBLIC RELATIONS
- Ongoing public relations – TV, Radio, Print, Online, Events
- In-house team managing reactive and proactive campaigns

MUMMY BLOGGING
- Kid’s Business blogger activation campaign
- Interactive exhibition space
- Face to face interaction with 50 of Australia’s top mummy bloggers, per event
- Brand info sent to database of over 1800 Aussie mummy bloggers
- Expectation of 200+ blogger posts

ONLINE
- Website feature – NEW and How to Use
- E-news to 40K consumers on the Smash database
- Promoting through Smash social media avenues (Facebook, Instagram) to showcase product and run promotions
- Multiple consumer competitions to increase engagement

ONLINE DEMOS
- Uploaded to the website
- Distributed through enews
- Available on Youtube

PARENTS AND CHILDREN TOGETHER

KIDS MAKE CONNECTION
PARENTS ENGAGE AND MAKE CONNECTION