

THE NEW CONSUMER



AND HOW THEY ARE POWERING TODAY'S ECONOMY.

The Neo vs. Traditional Consumer

Has consumer behavior forever changed?



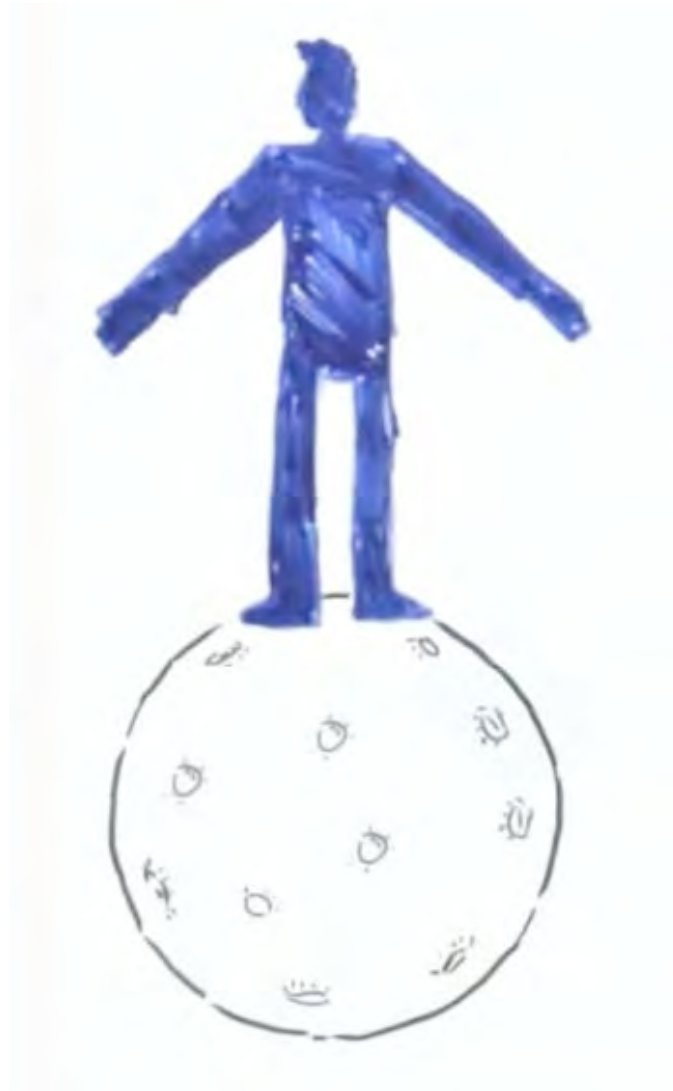
Highlights

1. Traditional & The NEO Consumers
2. Power of “The Story”
3. Unique, Individual, Authentic = VALUE
4. Aligning Value with the Customer
5. Finding unmet demands of the Customer





Planet Traditional



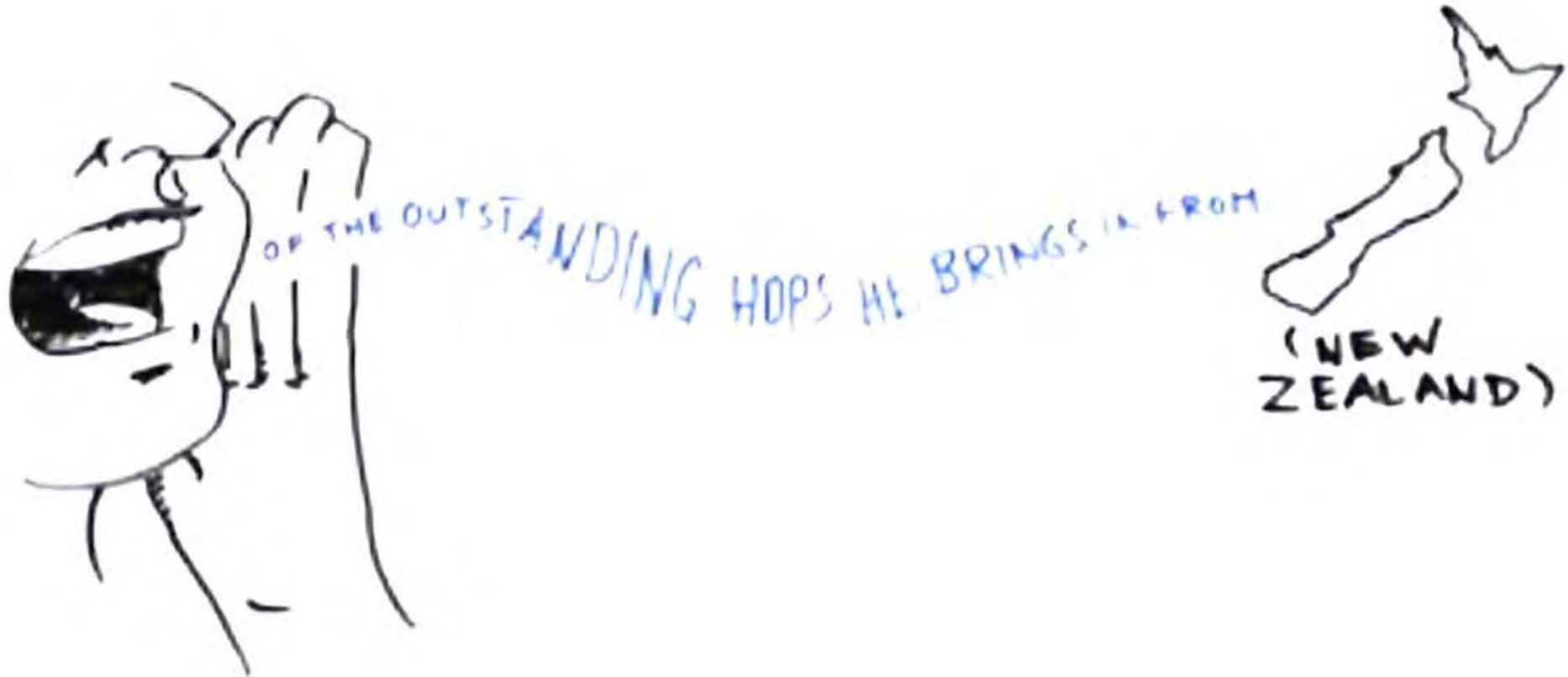
Planet NEO

The NEO's

- **6x** more likely to eat at a restaurant
- **2x** more likely to seek higher education
- Heavy internet users
(9x more likely than traditional consumers)



Power of the Story



Power of the Story



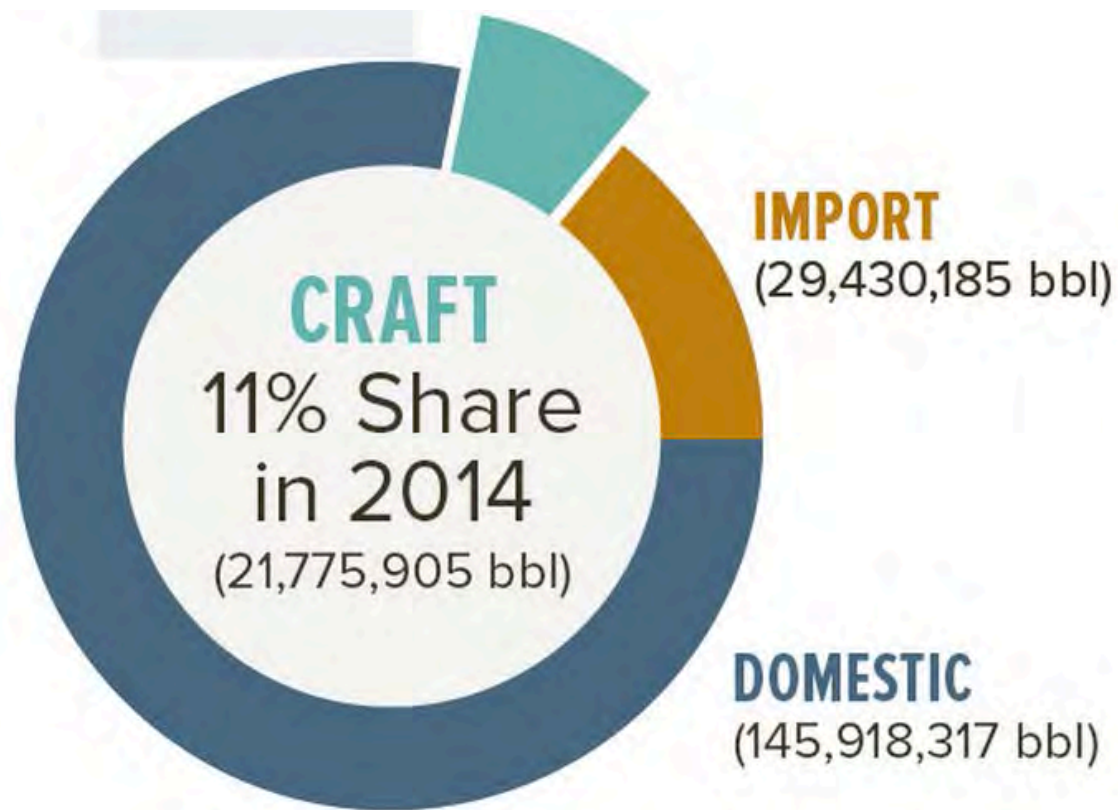
U.S. CRAFT BREWERS'

Growth in the Beer Category

Volume share for craft brewers



CRAFT SURPASSED
volume share **5%**
for the **first time** and
CONTINUES TO GAIN
at a point when large brewer
VOLUMES ARE IN DECLINE.



CRAFT

11% Share
in 2014

(21,775,905 bbl)

IMPORT

(29,430,185 bbl)

DOMESTIC

(145,918,317 bbl)

OVERALL BEER MARKET
\$101.5 BILLION

CRAFT BEER MARKET
\$19.6 BILLION

22% DOLLAR SALES GROWTH

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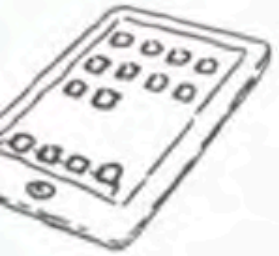
REPRESENTS
19%
OF THE MONEY

**Unique, Individual, Authentic
= PERCIEVED VALUE**



**UNIQUE
INDIVIDUAL
AUTHENTIC**





AUTHENTICITY



Unique, Individual, Authentic = PERCIEVED VALUE



3rd quarter - up 16%
to 450 million

Forecast Fiscal
Year End
2 billion

THIS JUST IN

\$690 Million last Q

Which Customer do we focus our time on?

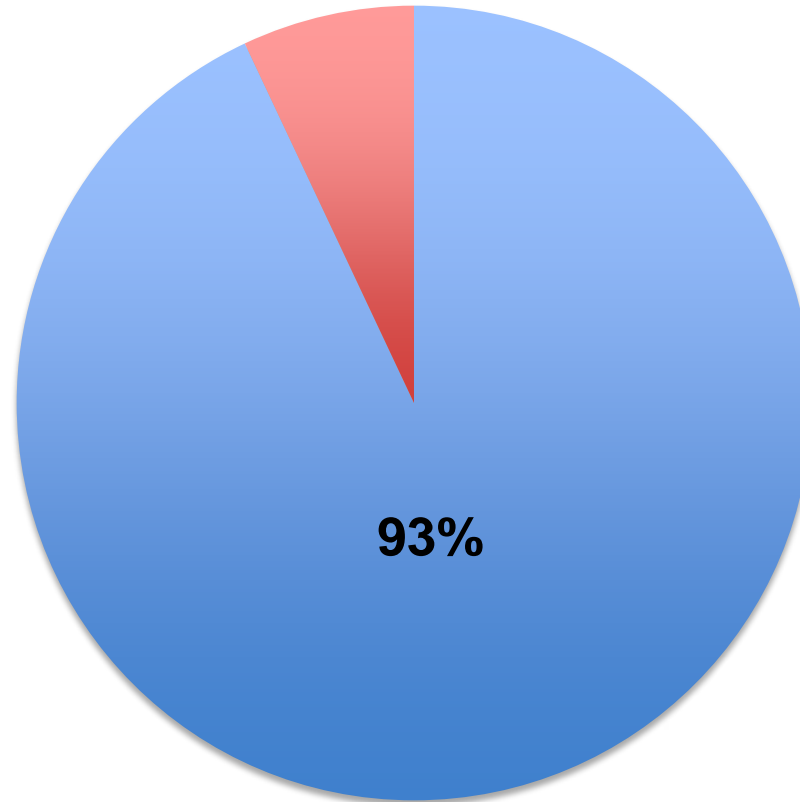


Traditional Consumer
Compete with Price



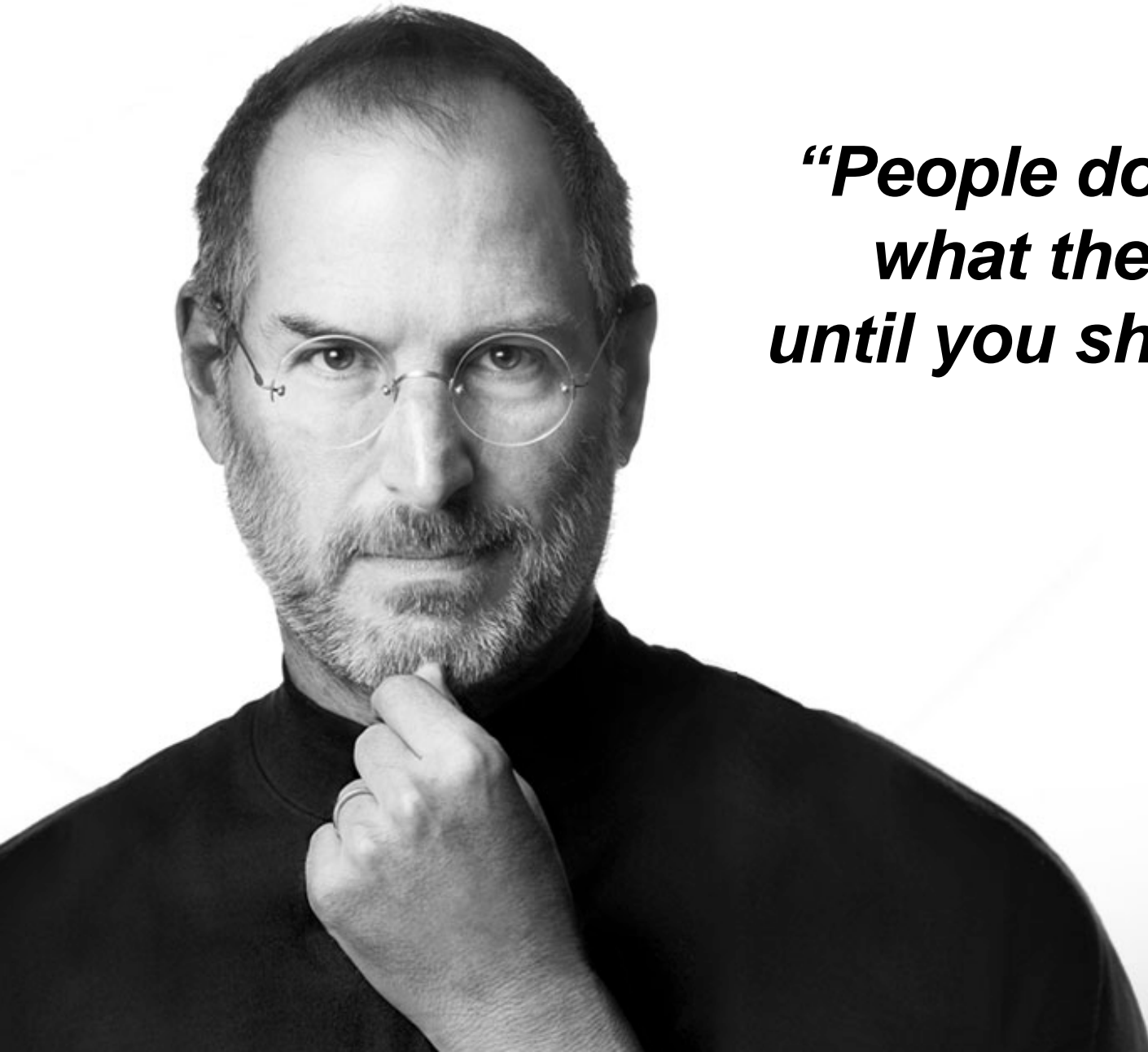
NEO Consumer
Find and Align Values

NEO Discretionary Spending



While only one quarter of the population, they represent the majority of the discretionary spending.

**Where does this
magical demand
come from?**

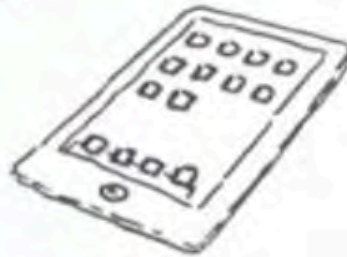


***“People don’t know
what they want
until you show them”***

SOME OF THE
MOST SIGNIFICANT
OF THESE ARE:



DESIGN



TO THE MOON



ACTUALLY WENT UP
THAT TRULY CONNECTED WITH THEM
THEIR EXPENDITURES UPON PRODUCTS + SERVICES
THAT DIDNT REALLY MATTER TO THEM
WHILE THEY CUT BACK ON THINGS

NEOS
BECAME MORE



FREE UP



FREE FLAP



FREE SWING



FREE FOLD



THE HÄFELE FREE FAMILY OF PRODUCTS
THE ELEGANCE OF OPENING



KEEP DOOR
KEEP CLOSE

Life
Ciao vita, bb

Nuovi piani cucina
FENIX 500
STOSA

Campbell's
CONDENSED
SOUP

Campbell's
CONDENSED
SOUP

Fresh Up
WILMINGTON

Nuovi piani cucina
FENIX 500
STOSA



FIRE DOOR
KEEP CLOSED

STOMA
FENIX

Lakeshire Cheese

RRK 741 RRK 892 CRL 907 37281 RRK 713

COMET 103
COMET 103

FIRE DOOR
KEEP CLOSED

Life
Change life, life
Life

FENIX 50

SNOWBIRD
HOPPING CO
SNOWBIRD
HOPPING CO





NEO Consumer Confidence

- **40% higher** than traditional consumers
- **55%** feel they will be better off next year
- **3x** more likely to generally feel better
- Purchase **3x** more premium wine
- Traditional consumers are fearful of the future

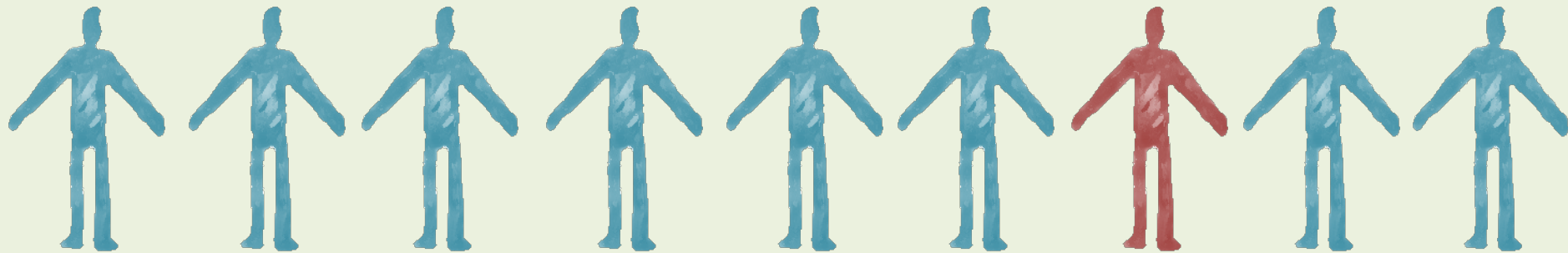


A white, scalloped-edged thought bubble is centered on a background of horizontal wooden planks. The bubble has a small tail pointing towards the bottom left. Inside the bubble, the text "Communicating Differently." is written in a bold, black, sans-serif font.

**Communicating
Differently.**

Being Different

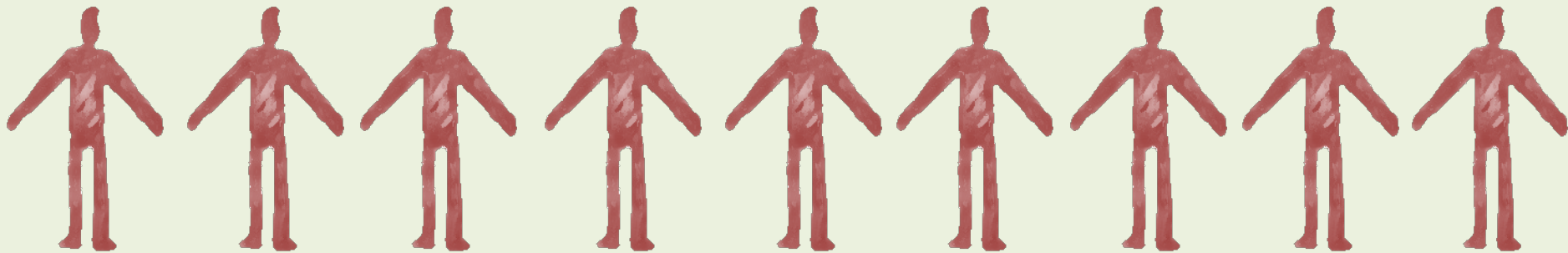
Being **different** – we believe that to succeed we need to be different (*raise the bar*) vs. the competition – right?



Being Different

That is until they catch up or get one step ahead of you!

So now what?



Creating a Difference through Influence

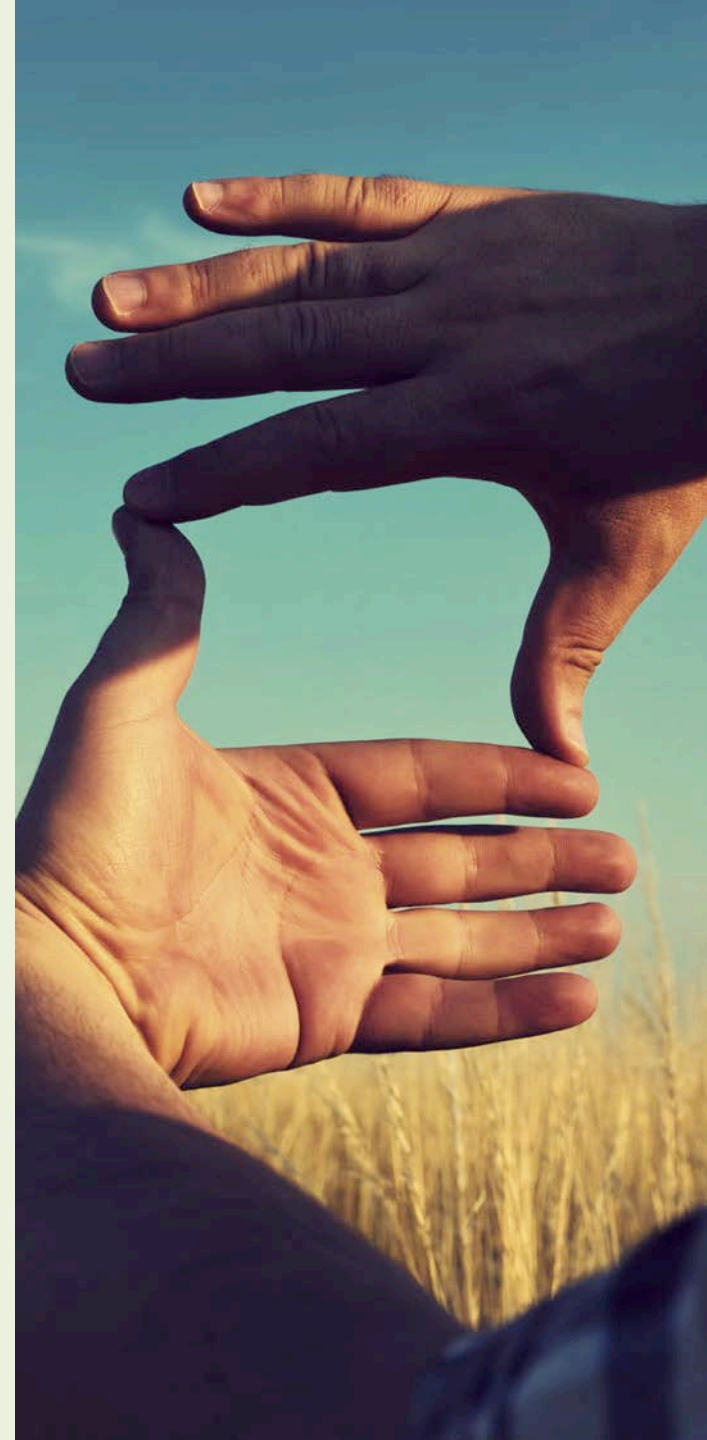
Truth is – we can't change
how people think, but we
can change how people feel.

Connecting

Persuading

Engage similarities

Make them believe in you



Sales & Marketing

PERSUADE



fig. 1 | REASON



MOTIVATE



fig. 2 | EMOTION

has **ALWAYS** been an art of how to persuade,
motivate and transfer emotion.

Sales & Marketing

It's about changing how people feel, and in turn - *helping them fall in love with a product or service.*


MOTIVATE



fig. 2 | EMOTION

Key to Influencing

In order to connect a product, a brand, a service or yourself to someone –



You Gotta
hear this!

*You must have a “**STORY**” to tell, a story your customers will want to believe in.*



Point of
Transition













A Great story includes:

- a. Emotion and have empathy
- b. A point of view
- c. Provide value / solutions
(customer or end user)
- d. Create a “difference” and be relevant
(customer or end user)



One for One.®

[ONE FOR ONE®](#)[THE GIFT OF SHOES](#)[THE GIFT OF SIGHT](#)[THE GIFT OF WATER](#)

With every pair of shoes you purchase, TOMS will give a new pair of shoes to a child in need. **One for One®.**

With each shoe purchase, a new pair of TOMS Shoes is given to child through one of our 100+ Shoe Giving Partners. Each of our partners provide health, education or community development programs to help improve the future of children, their families and communities in need.

TOMS offers brand new, made-to-order shoes in a variety of styles to meet the needs of the children our Giving Partners serve. We also produce many of our Giving Shoes in the **regions where we give**, helping support and create local jobs in places where they are needed.

TOMS

I LOVE COMPANIES THAT GIVE BACK

and use business to improve lives.

I AGREE

I DISAGREE

shoes to a child in need. **One for One®**.

With each shoe purchase, a new pair of TOMS Shoes is given to child through one of our 100+ Shoe Giving Partners. Each of our partners provide health, education or community development programs to help improve the future of children, their families and communities in need.

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TOMS

SO DO WE

WITH EVERY PRODUCT YOU
PURCHASE, TOMS WILL HELP A
PERSON IN NEED. ONE FOR ONE®

FOR UPDATES AND EXCLUSIVE OFFERS, ENTER YOUR EMAIL BELOW.

Enter Your Email Here

JOIN THE MOVEMENT

shoes to a child in need. **One for One®**.

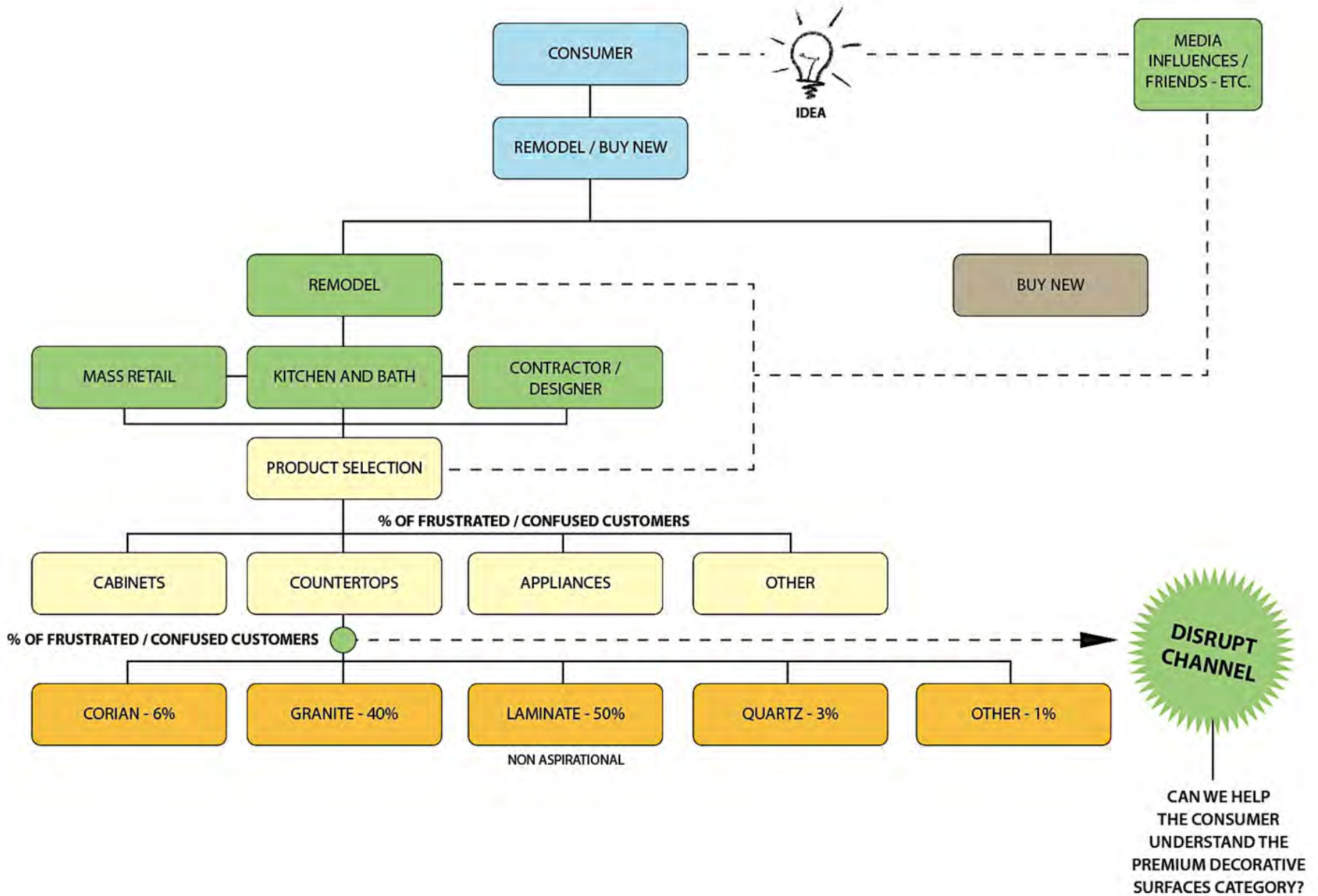
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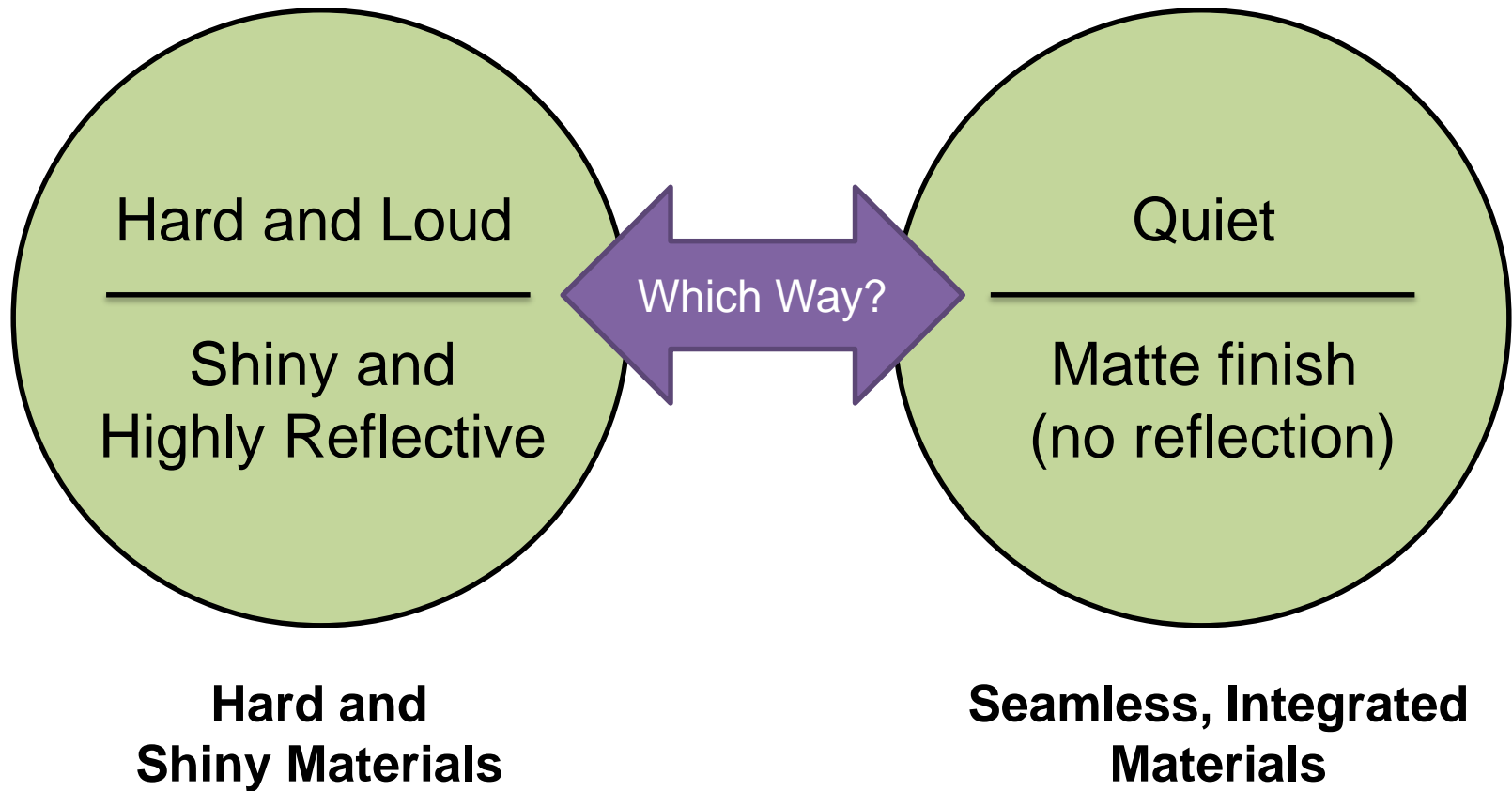


Alison

The Confused
Consumer



End User Path – Educated Choice




Communicating Your Story

Relevance is the new Remarkable.

KNOW YOUR AUDIENCE

- Understand what is relevant for them
- Understand what is the “perceived value”
- Understand what they care about




Acoustics
Reflectivity
Point of transition

Creating Your Story

Relevance is the new Remarkable.

Its not our products
people care about –
it's the journey, the story,
creating a difference
which will motivate emotion
to persuade reason.



Warm and calming
environment

I CAN'T HEAR MYSELF DRINK





PERSUADE

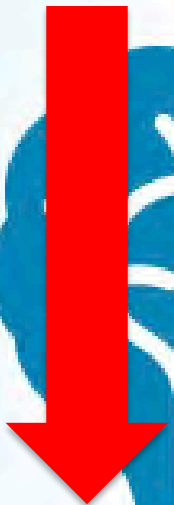
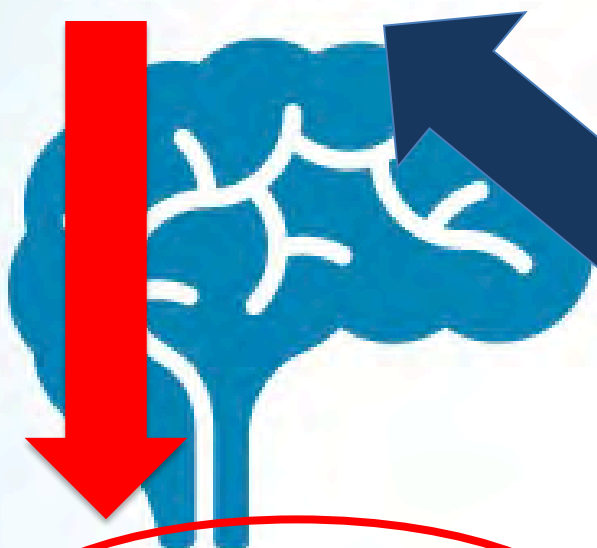


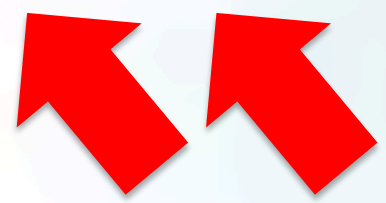
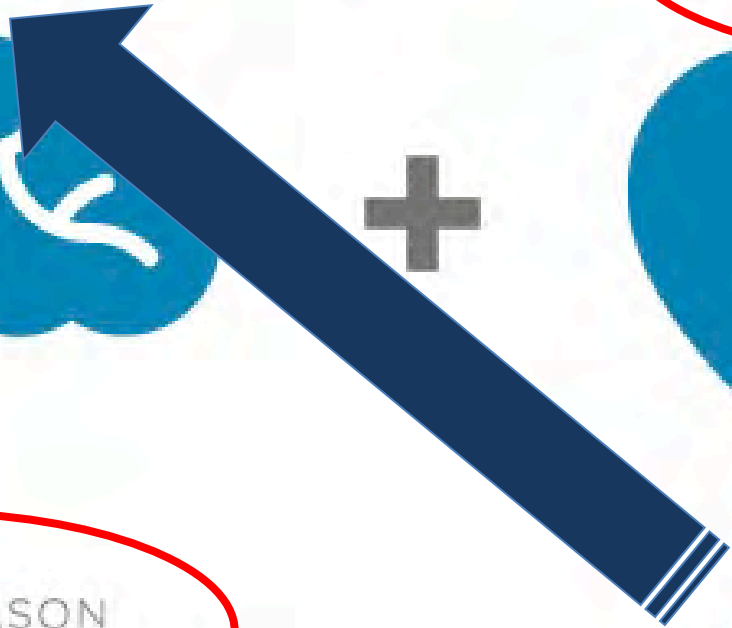
fig. 1 | REASON

+

MOTIVATE



fig. 2 | EMOTION







Planet Traditional



Who's the target for this story?



Planet NEO

The Story



**It's time to stop speaking in bullet points.
Its time for storytelling, influencing,
persuade, create a movement**

Wrap your pitch and unique value
in a story your customer
wants to hear, believe and
with real-world value.



A white, scalloped-edged thought bubble is centered on a background of horizontal wooden planks. The bubble has a small tail pointing towards the bottom left. Inside the bubble, the words "RE-CAP" are written in a bold, black, sans-serif font.

RE-CAP



Planet Traditional



Planet NEO



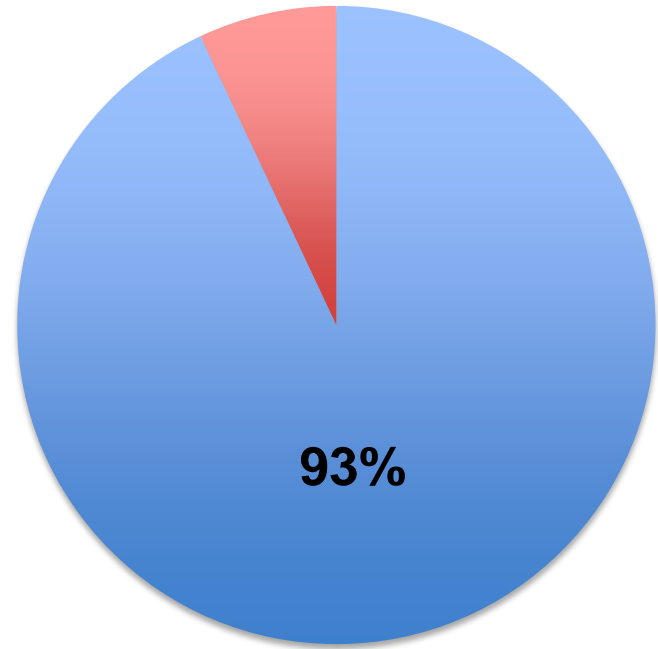
On Planet NEO

- A Desire for connection
- Look for uniqueness & authenticity
- Align values to brands
- Part of a movement

The NEO Power



All spending



**Represent the majority of
discretionary spending.**



Thank You.

**Any final thoughts or
questions?**

Lets keep the conversation going
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