The Newness Effect

Connecting the dots between implicit emotional impact and behavioral disruption

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CEO, InsightsNow

Quirks Chicago
October 1, 2021

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Who We Are & What We Do

RECOGNIZED AS INNOVATORS ON INNOVATION INSIGHTS

InsightsNow takes a **behavioral approach** to understanding **humans** and **human behavior** in everything we do.

We drive your product and brand success through research programs which bring innovative thinking, processes, and behavioral KPI's which ensure your success in market.

KEY POINTS OF DIFFERENTIATION

Behavioral Frameworks & KPI's

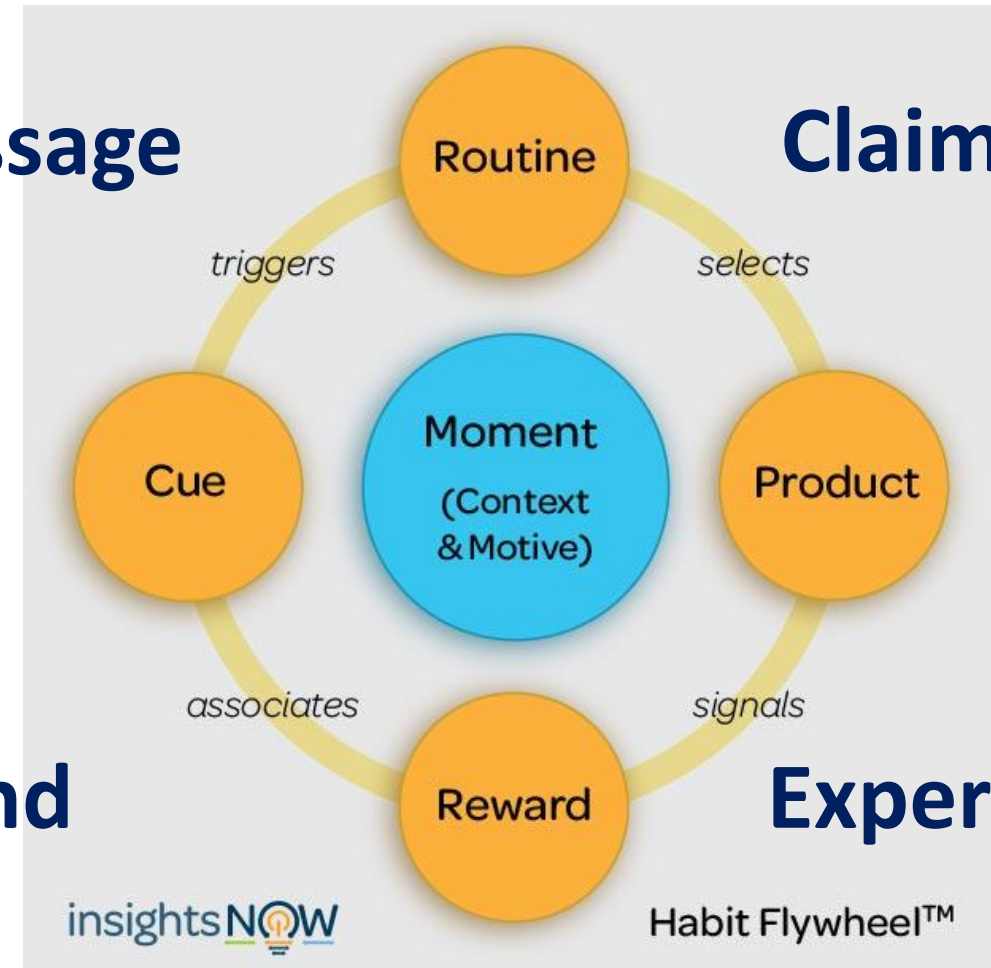Innovation Training and Tools

Ecosystem of Innovation Partners

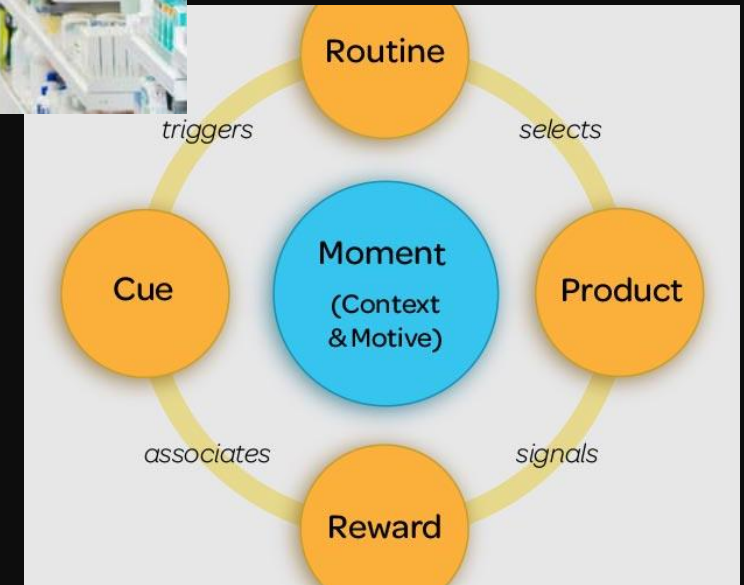# Newness

Message

Claims

Brand

Experience

Habit Flywheel™

Routine

triggers

selects

Cue

Moment
(Context
& Motive)

Product

associates

signals

Reward

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The Newness Effect

Brand **T**rust

Claims **R**elevance

Uniqueness

Experience **E**motional Impact

↓

Disruption   Lift

Beyond Meat

Case Study

August 2019

Beyond Meat Revenue Growth ($M)

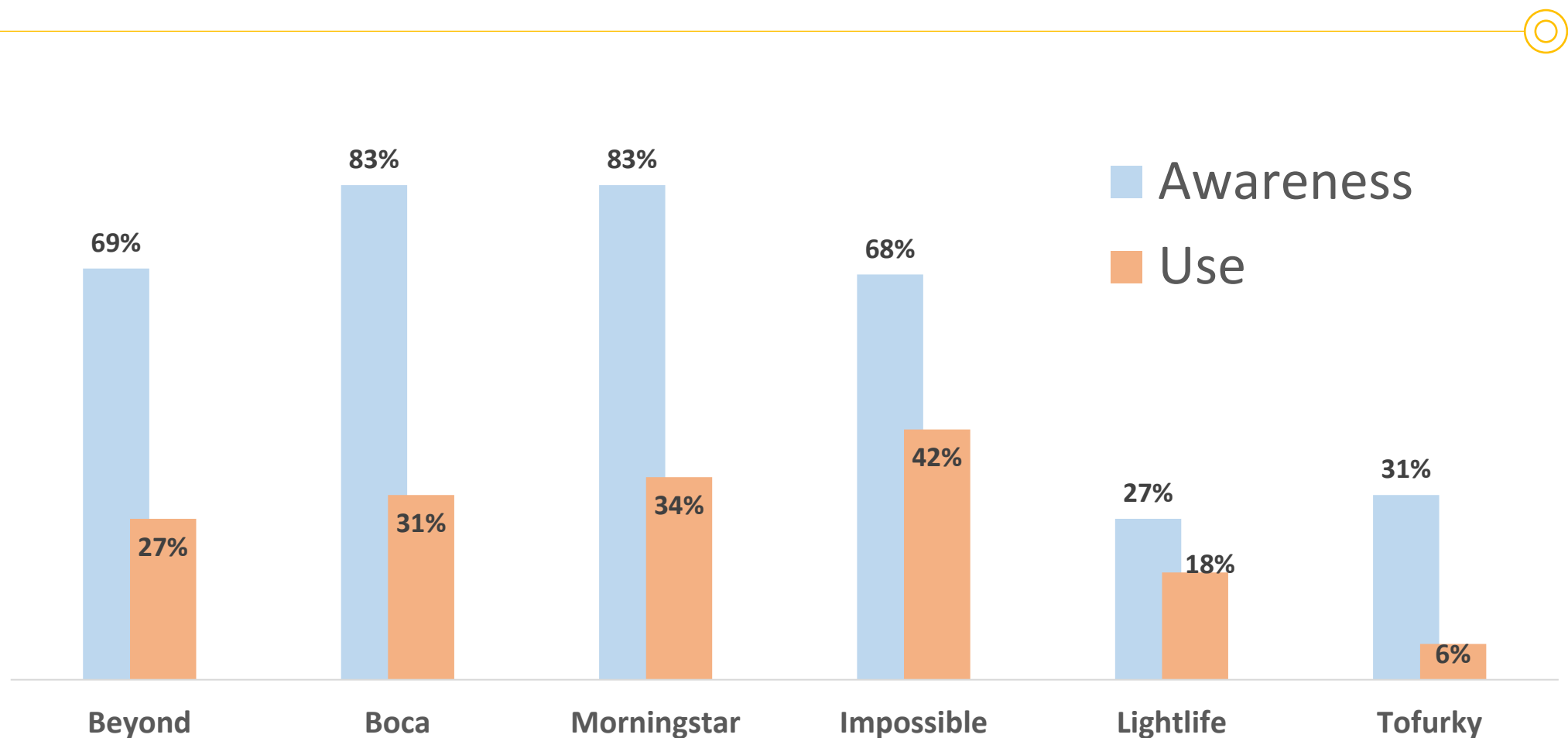|			$298	$285
		$88		
$16	$33			
2016	2017	2018	2019	2020
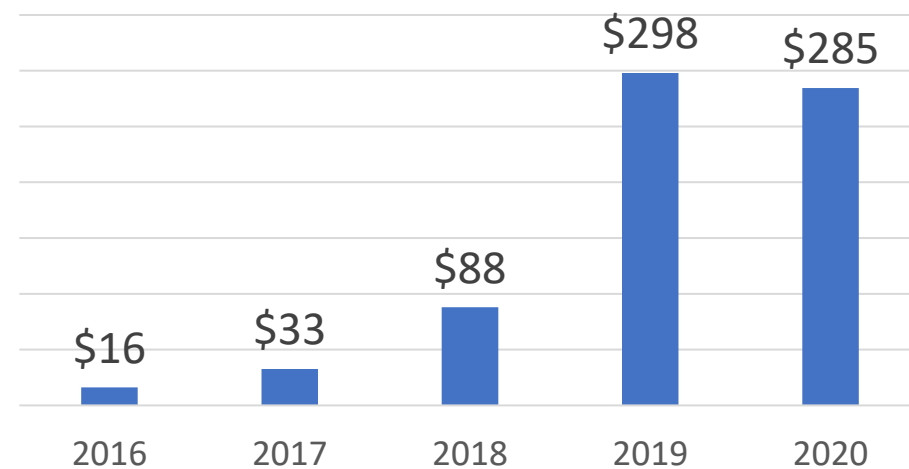
Community of Product Category Advocates™

Primary Shoppers and Category Users

Food, Beverage, Supplements, Beauty Care, Personal Care, Home & Air Care

Community Established in 2019

- Category Specific Users
- Available for Home Use Testing
- Direct Delivery of Products (including frozen and refrigerated foods)

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2019 Awareness & Trial of Plant-Based Burgers

Legend:
- Awareness (light blue)
- Use (orange)

Brand	Awareness	Use
Beyond	69%	27%
Boca	83%	31%
Morningstar	83%	34%
Impossible	68%	42%
Lightlife	27%	18%
Tofurky	31%	6%

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Community Home Use Test

- Pre-Trial Assessment of the Category
- Trial of Regular Plant-Based Burger
- Post Trial Regular Assessment of the Experience and the Category
- Trial of Beyond Burger
- Post Trial Assessment of the Experience and the Category
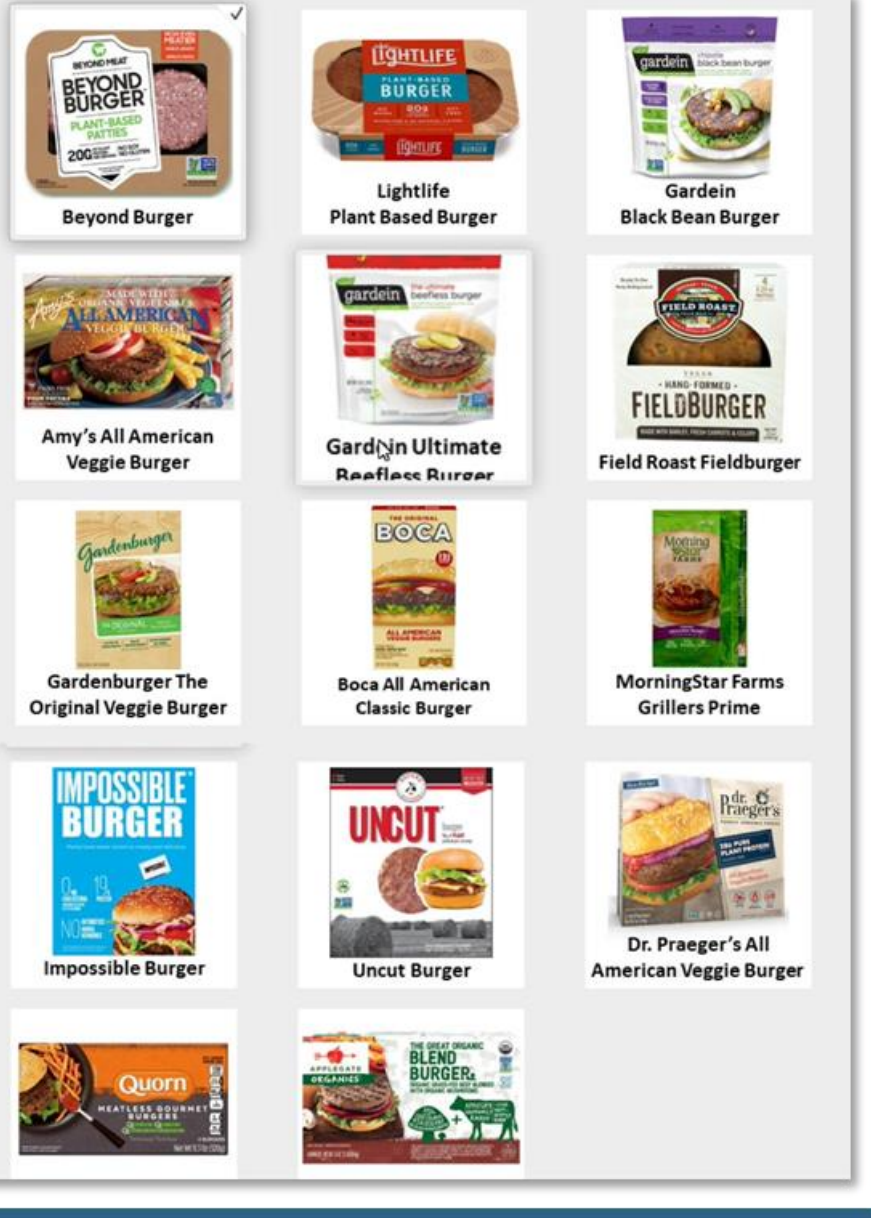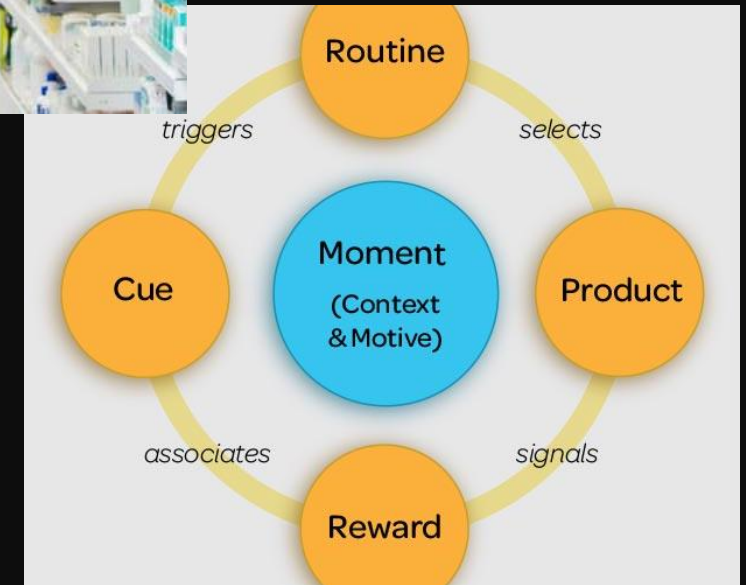
The Newness Effect

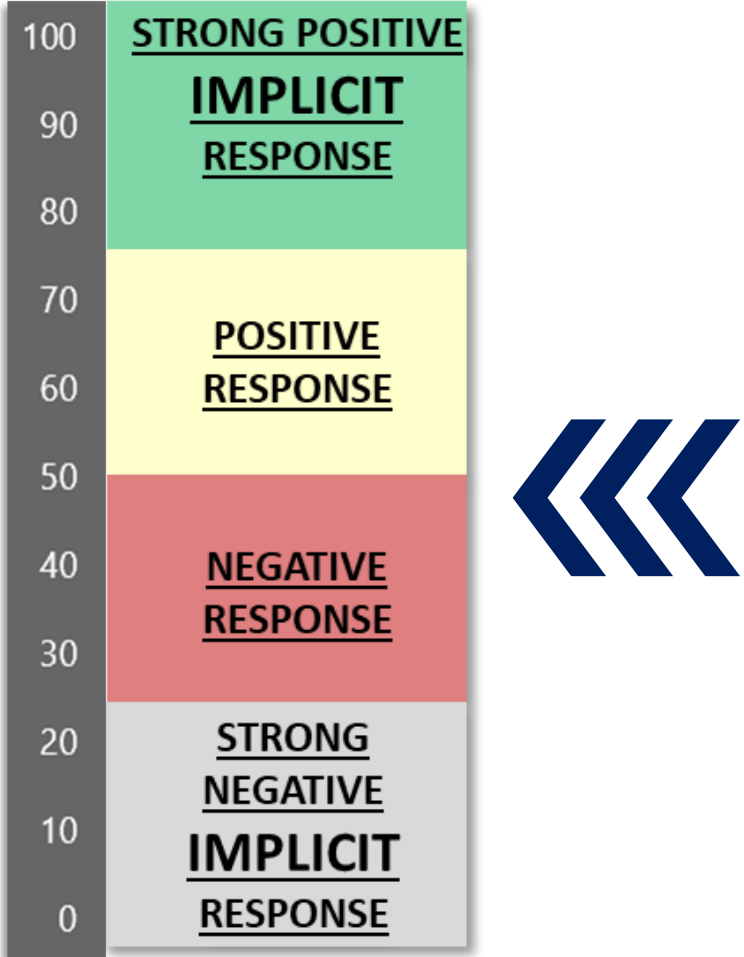Brand **T**rust

Claims **R**elevance

Uniqueness

Experience **E**motional Impact

Disruption Lift

Implicit Brand Trust | Implicit / Explicit Test™

If aware of the brand ...

Do you trust or distrust this brand?

Tofurky

TRUST   DISTRUST

Implicit Behavioral Measures % Trust/Distrust and Time to Respond

Screen automatically advances when answer is selected.

Scale markings: 100, 90, 80, 70, 60, 50, 40, 30, 20, 10, 0

STRONG POSITIVE **IMPLICIT** RESPONSE

POSITIVE RESPONSE

NEGATIVE RESPONSE

STRONG NEGATIVE **IMPLICIT** RESPONSE

Implicit Brand Trust
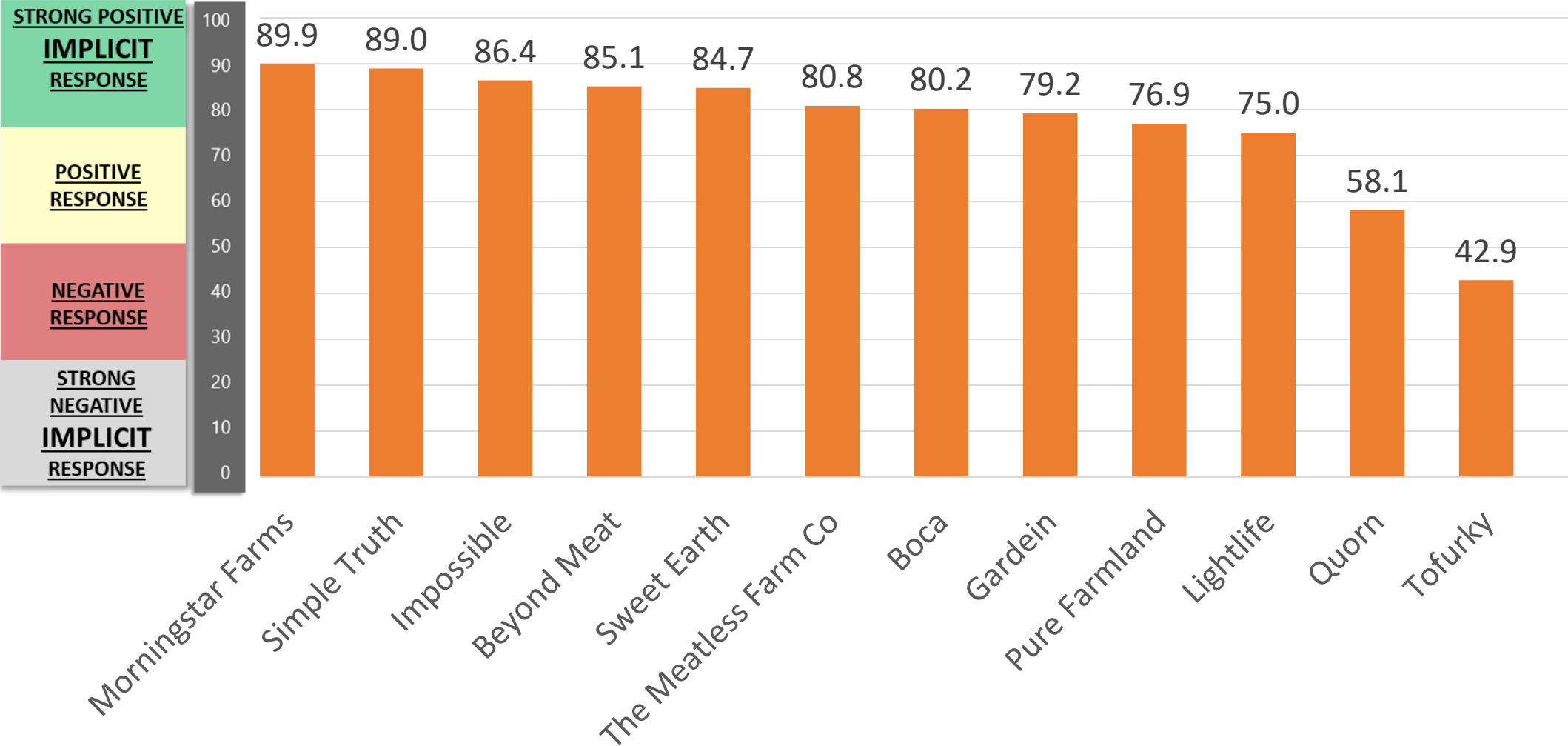
Drivers of Implicit Brand Trust
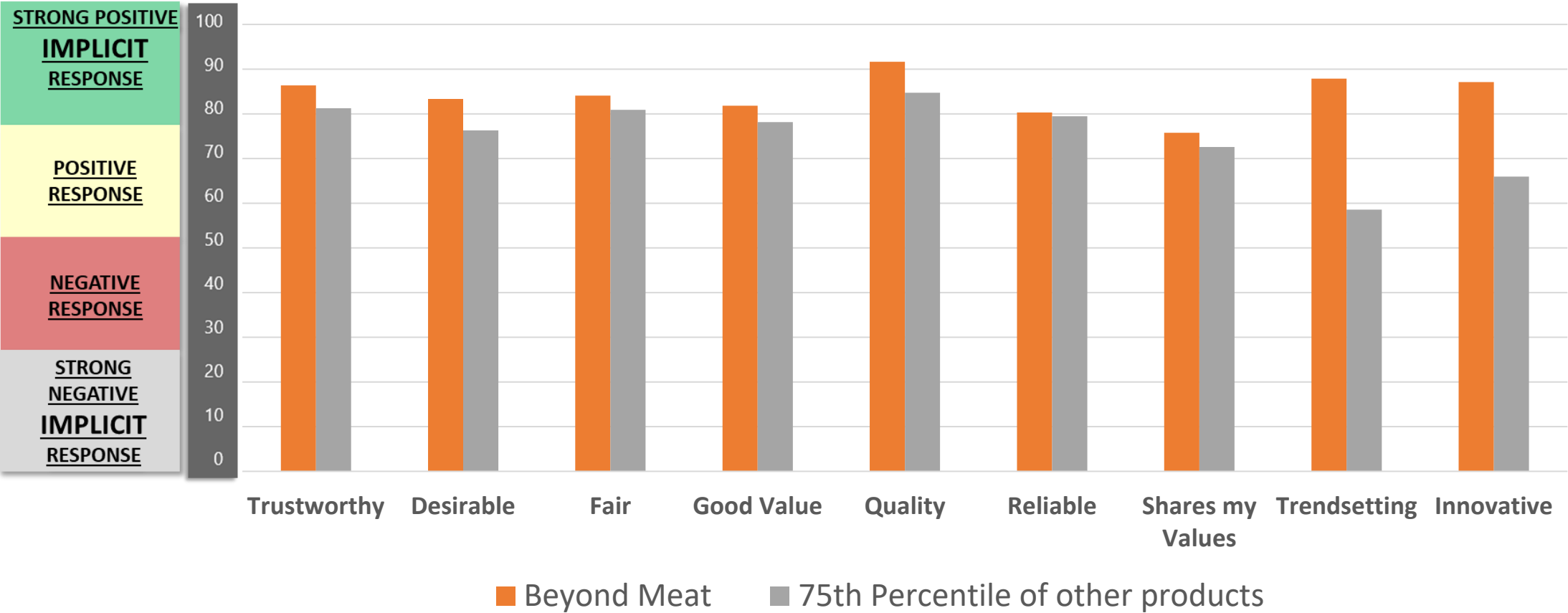
| STRONG POSITIVE IMPLICIT RESPONSE |
| POSITIVE RESPONSE |
| NEGATIVE RESPONSE |
| STRONG NEGATIVE IMPLICIT RESPONSE |

Trustworthy   Desirable   Fair   Good Value   Quality   Reliable   Shares my Values   Trendsetting   Innovative

■ Beyond Meat   ■ 75th Percentile of other products

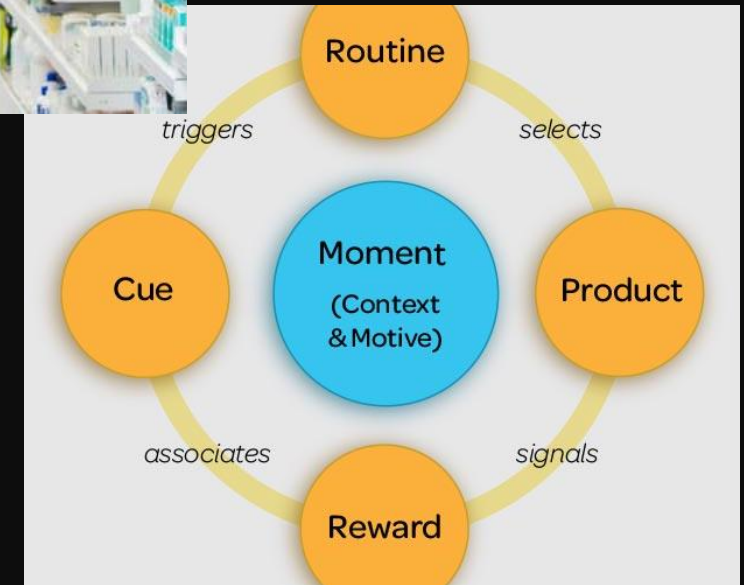insightsNOW

The Newness Effect

Brand **T**rust

Claims **R**elevance

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Disruption Lift

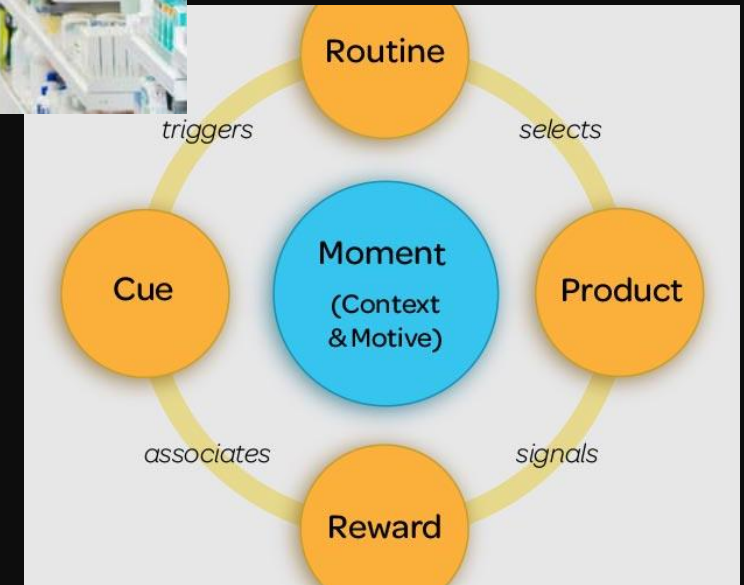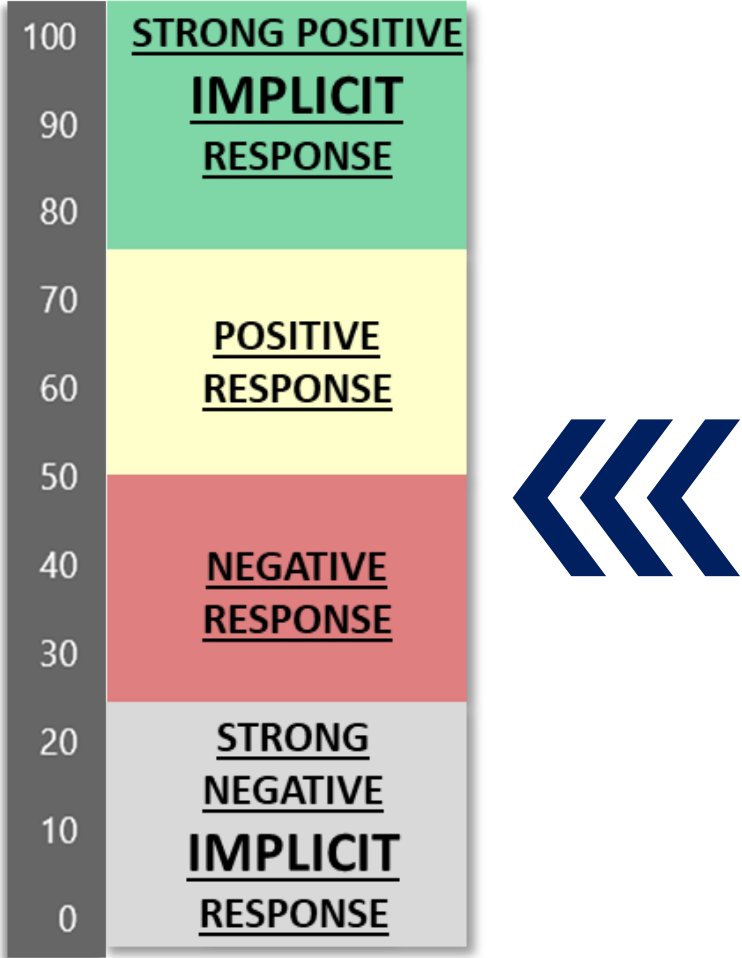# The Newness Effect

Brand   **T**rust

Claims   **R**elevance
Uniqueness

Experience   **E**motional Impact

Disruption   Lift

Implicit Relevance | Implicit / Explicit Test™

100	STRONG POSITIVE **IMPLICIT** RESPONSE
90	
80	
70	**POSITIVE RESPONSE**
60	
50	
40	**NEGATIVE RESPONSE**
30	
20	**STRONG NEGATIVE IMPLICIT RESPONSE**
10	
0	

When consider purchasing a plant-based burger, is this claim relevant to you?
Gluten Free

YES   NO

Implicit Behavioral Measures % YES/NO and Time to Respond

Screen automatically advances when answer is selected.

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Explicit Relevance | Implicit / Explicit Test™

STRONG POSITIVE
IMPLICIT RESPONSE

POSITIVE RESPONSE

NEGATIVE RESPONSE

STRONG NEGATIVE **IMPLICIT** RESPONSE

100 90 80 70 60 50 40 30 20 10 0
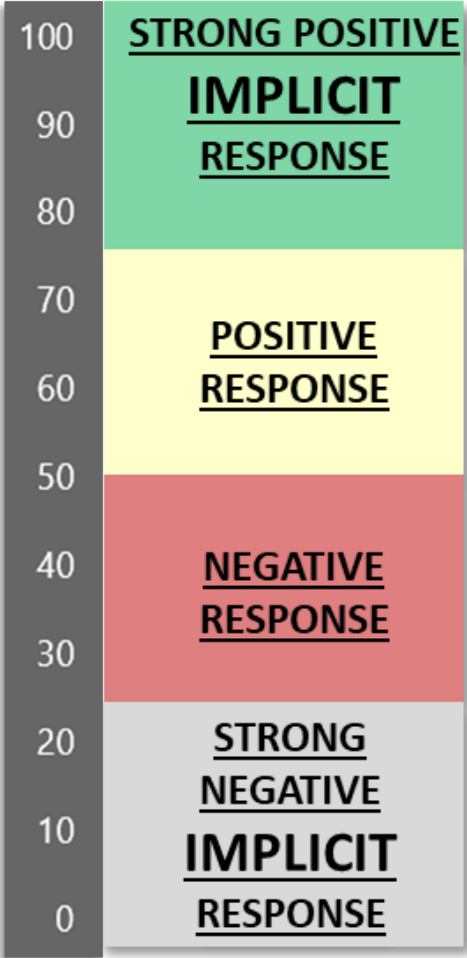
When consider purchasing a plant-based burger, is this claim relevant to you?
USDA Organic

YES   NO

Implicit Behavioral Measures % YES/NO and Time to Respond
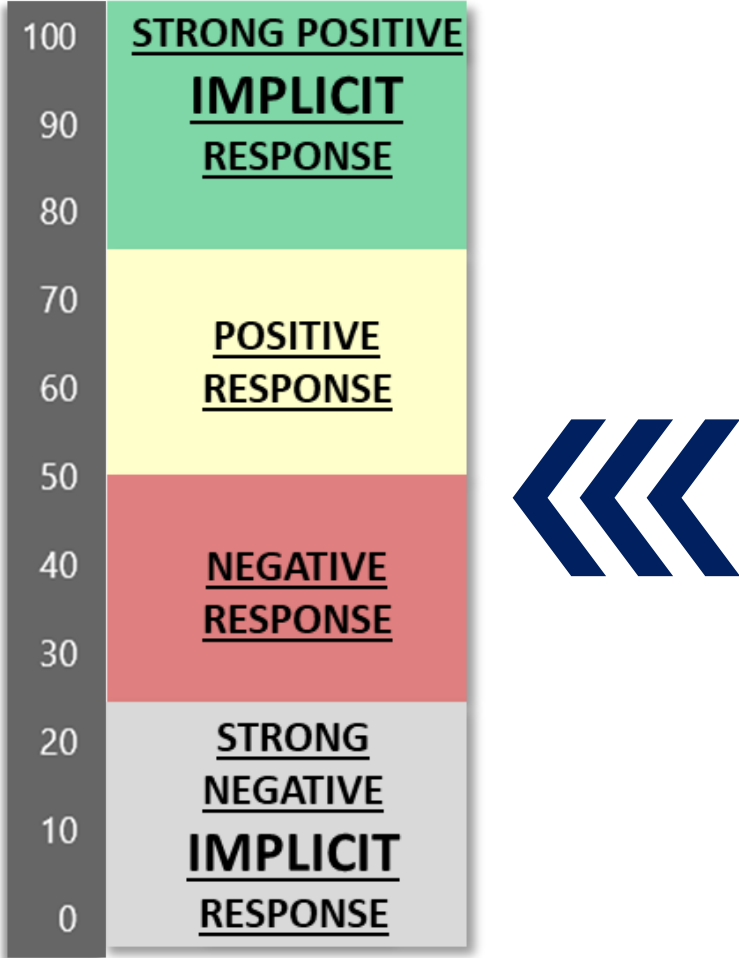
Screen automatically advances when answer is selected.

Uniqueness and Implicit Relevance – Claims for Nudging
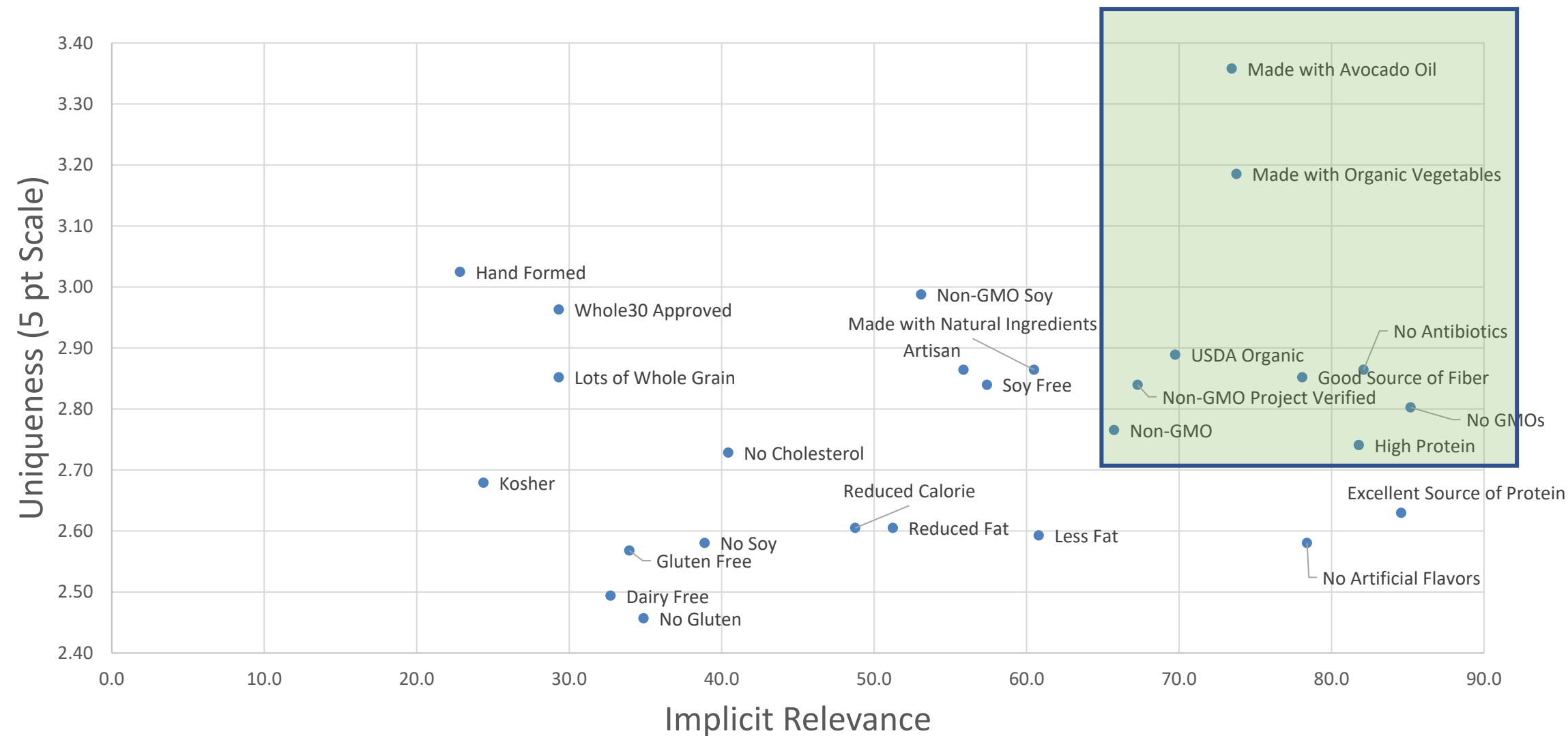
Uniqueness and Explicit Relevance – Claims for Disrupting

Uniqueness (5 pt Scale) vs Explicit Relevance (% Slow and Relevant)

- Made with Avocado Oil
- Made with Organic Vegetables
- Hand Formed
- Non-GMO Soy
- Whole30 Approved
- USDA Organic
- Non-GMO Project Verified
- Made with Natural Ingredients
- No Antibiotics
- Lots of Whole Grain
- Soy Free
- Good Source of Fiber
- Artisan
- No GMOs
- Non-GMO
- High Protein
- No Cholesterol
- Kosher
- Reduced Fat
- Excellent Source of Protein
- No Soy
- Reduced Calorie
- Less Fat
- Gluten Free
- No Artificial Flavors
- Dairy Free
- No Gluten

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Ingredient Clean Label Score | Implicit / Explicit Test™

100	STRONG POSITIVE **IMPLICIT** RESPONSE
90	
80	
70	POSITIVE RESPONSE
60	
50	
40	NEGATIVE RESPONSE
30	
20	STRONG NEGATIVE **IMPLICIT** RESPONSE
10	
0	

When consider purchasing a plant-based burger, how will you feel about the following ingredient?
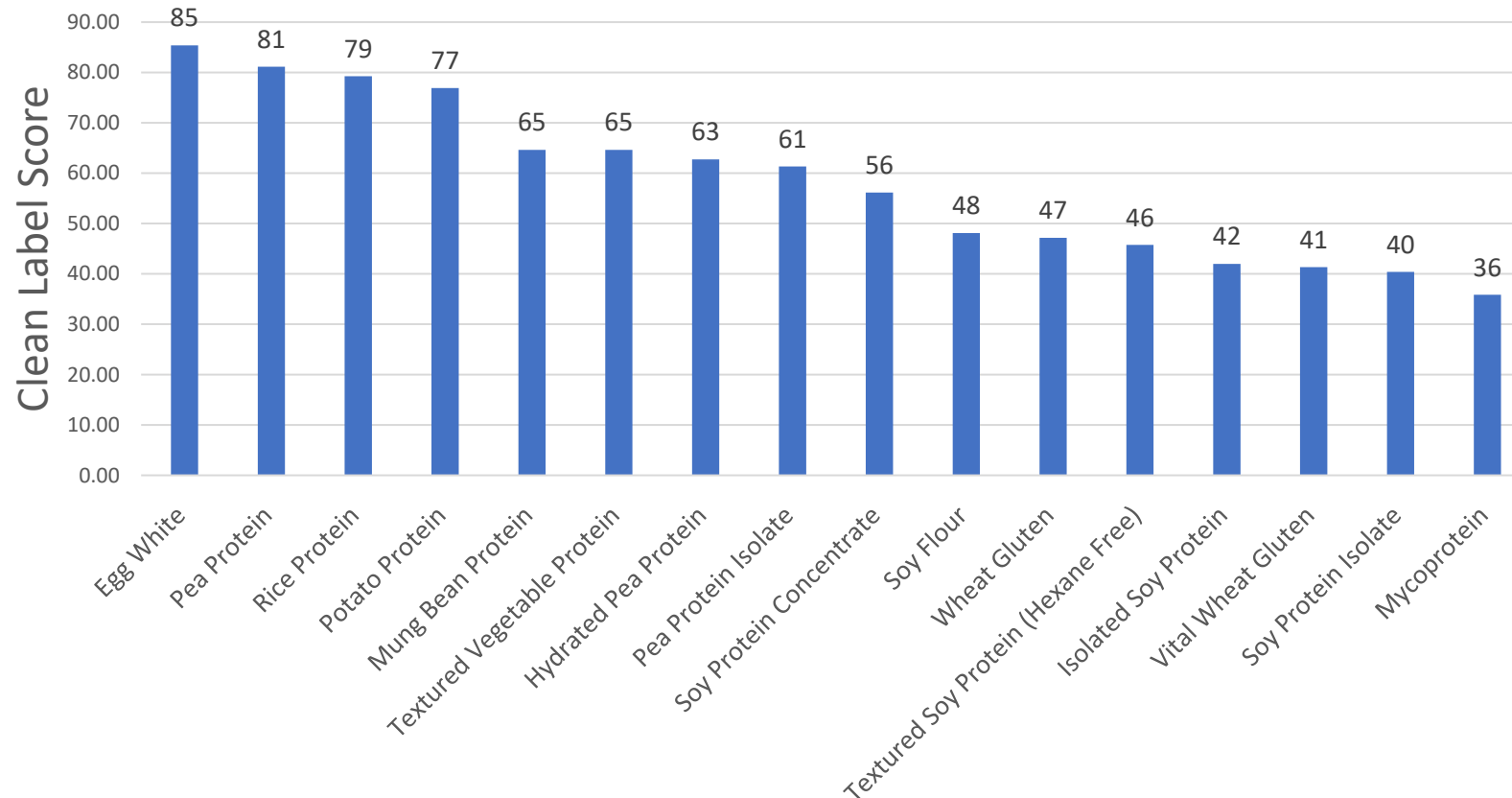**Soy Protein Isolate**

OK   AVOID

Screen automatically advances when answer is selected.

Ingredient Design for Clean Label

Proteins

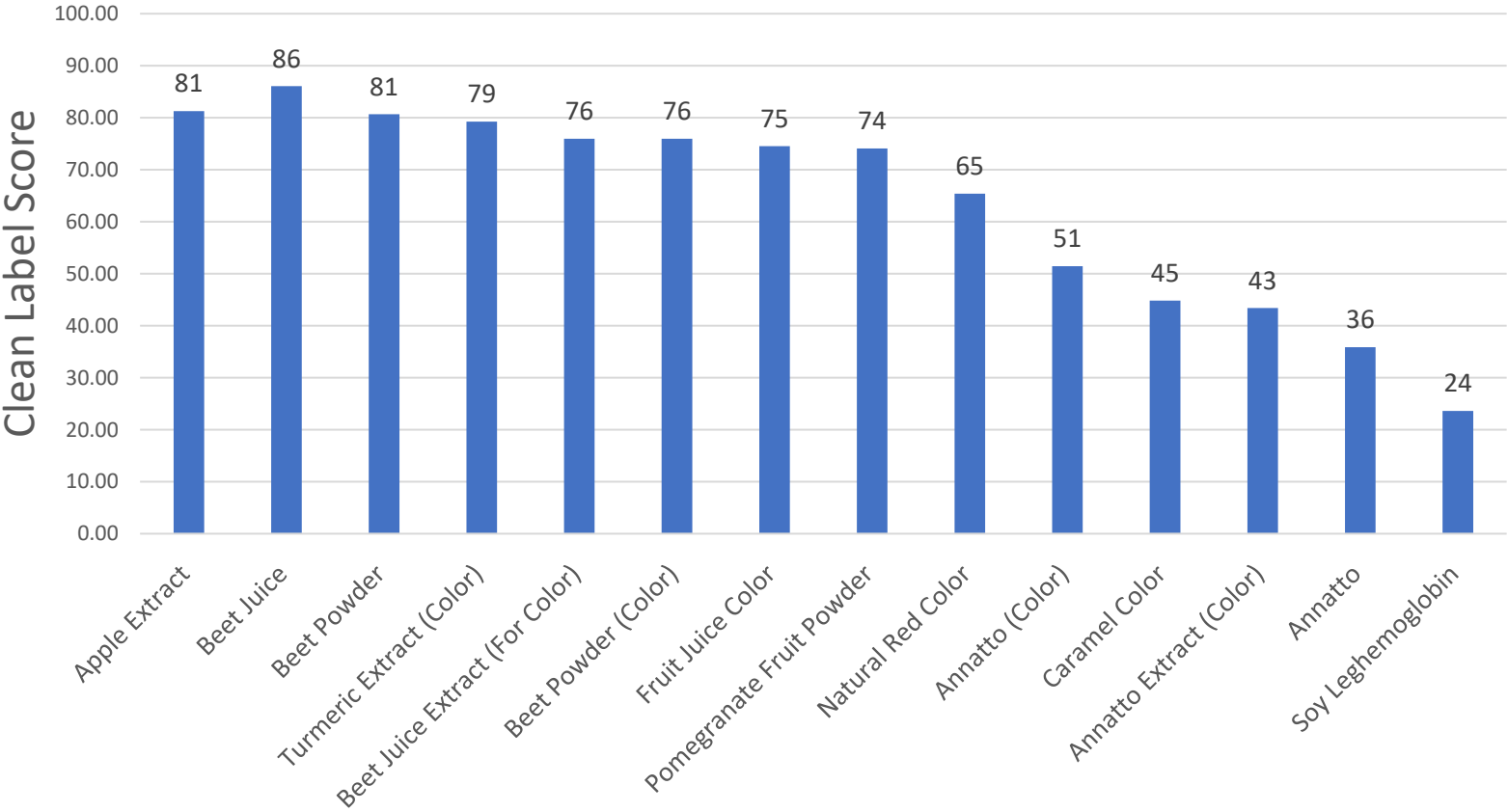| Protein	Clean Label Score
Egg White	85
Pea Protein	81
Rice Protein	79
Potato Protein	77
Mung Bean Protein	65
Textured Vegetable Protein	65
Hydrated Pea Protein	63
Pea Protein Isolate	61
Soy Protein Concentrate	56
Soy Flour	48
Wheat Gluten	47
Textured Soy Protein (Hexane Free)	46
Isolated Soy Protein	42
Vital Wheat Gluten	41
Soy Protein Isolate	40
Mycoprotein	36

BEYOND BURGER®

Ingredients: Water, Pea Protein Isolate, Expeller Pressed Canola Oil, Refined Coconut Oil, Rice Protein, Natural Flavors, Cocoa Butter, Mung Bean Protein, Methylcellulose, Potato Starch, Apple Extract, Salt, Potassium Chloride, Vinegar, Lemon Juice Concentrate, Sunflower Lecithin, Pomegranate Fruit Powder, Beet Juice Extract (for color).

IMPOSSIBLE™ BURGER

Ingredients: Water, Soy Protein Concentrate, Coconut Oil, Sunflower Oil, Natural Flavors, Potato Protein, Methylcellulose, Yeast Extract, Cultured Dextrose, Food Starch Modified, Soy Leghemoglobin, Salt, Soy Protein Isolate, Mixed Tocopherols (Vitamin E), Zinc Gluconate, Thiamine Hydrochloride (Vitamin B1), Sodium Ascorbate (Vitamin C), Niacin, Pyridoxine Hydrochloride (Vitamin B6), Riboflavin (Vitamin B2), Vitamin B12.

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Ingredient Design for Clean Label

Colors

Bar chart titled "Colors" with y-axis labeled "Clean Label Score" (0.00 to 100.00):

Color	Clean Label Score
Apple Extract	81
Beet Juice	86
Beet Powder	81
Turmeric Extract (Color)	79
Beet Juice Extract (For Color)	76
Beet Powder (Color)	76
Fruit Juice Color	75
Pomegranate Fruit Powder	74
Natural Red Color	65
Annatto (Color)	51
Caramel Color	45
Annatto Extract (Color)	43
Annatto	36
Soy Leghemoglobin	24

BEYOND BURGER®

Ingredients: Water, Pea Protein Isolate, Expeller Pressed Canola Oil, Refined Coconut Oil, Rice Protein, Natural Flavors, Cocoa Butter, Mung Bean Protein, Methylcellulose, Potato Starch, Apple Extract, Salt, Potassium Chloride, Vinegar, Lemon Juice Concentrate, Sunflower Lecithin, Pomegranate Fruit Powder, Beet Juice Extract (for color).
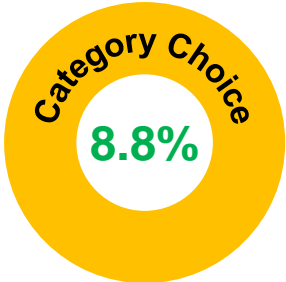
IMPOSSIBLE™ BURGER

Ingredients: Water, Soy Protein Concentrate, Coconut Oil, Sunflower Oil, Natural Flavors, Potato Protein, Methylcellulose, Yeast Extract, Cultured Dextrose, Food Starch Modified, Soy Leghemoglobin, Salt, Soy Protein Isolate, Mixed Tocopherols (Vitamin E), Zinc Gluconate, Thiamine Hydrochloride (Vitamin B1), Sodium Ascorbate (Vitamin C), Niacin, Pyridoxine Hydrochloride (Vitamin B6), Riboflavin (Vitamin B2), Vitamin B12.
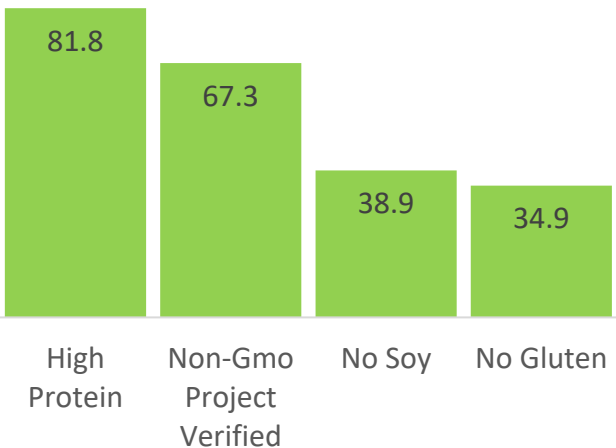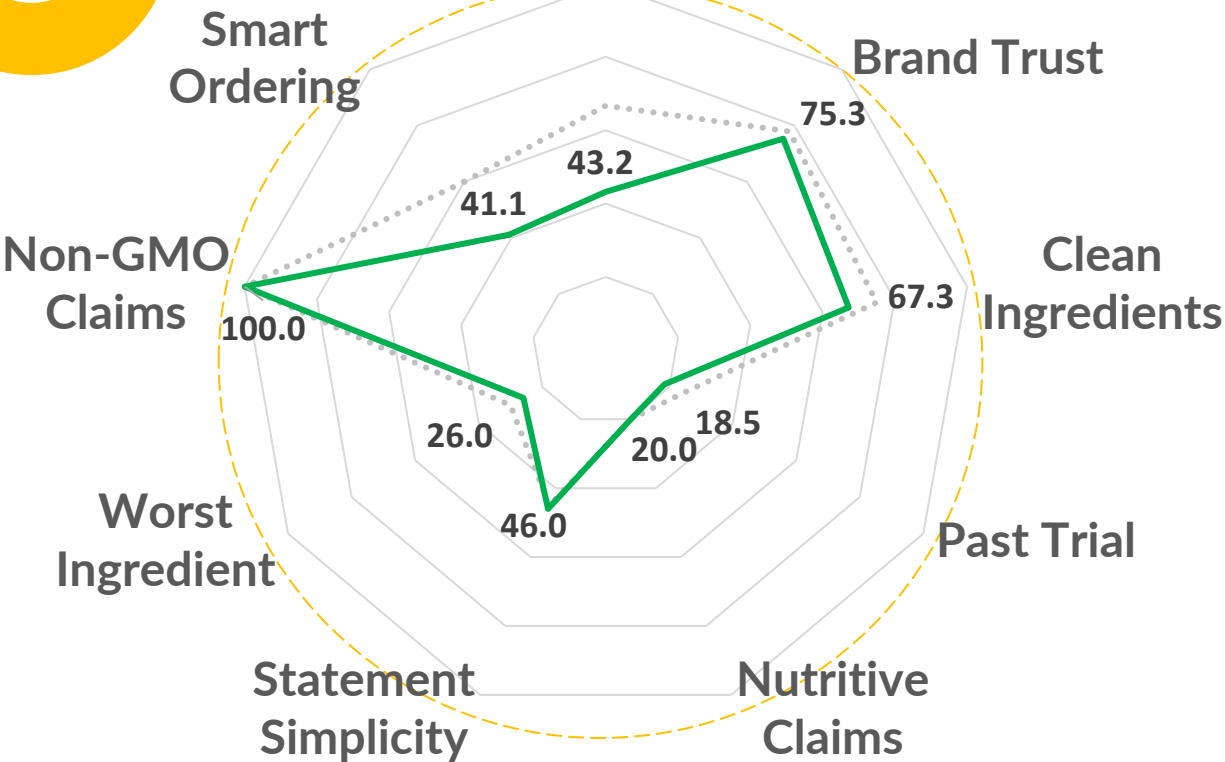
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Product Label Scorecard | Pre-Trial Category Baseline

BEYOND BURGER®

Category Choice
8.8%

Top Claims

- High Protein: 81.8
- Non-Gmo Project Verified: 67.3
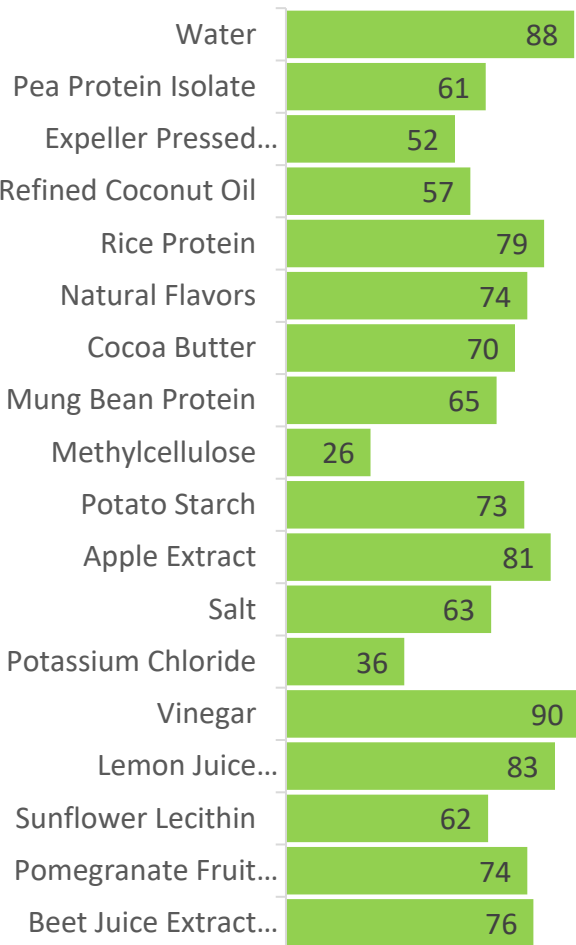- No Soy: 38.9
- No Gluten: 34.9

Ingredients: Water, Pea Protein Isolate, Expeller Pressed Canola Oil, Refined Coconut Oil, Rice Protein, Natural Flavors, Cocoa Butter, Mung Bean Protein, Methylcellulose, Potato Starch, Apple Extract, Salt, Potassium Chloride, Vinegar, Lemon Juice Concentrate, Sunflower Lecithin, Pomegranate Fruit Powder, Beet Juice Extract (for color).

KPI Scores

- Brand Awareness: 43.2
- Brand Trust: 75.3
- Clean Ingredients: 67.3
- Past Trial: 18.5
- Nutritive Claims: 20.0
- Statement Simplicity: 46.0
- Worst Ingredient: 26.0
- Non-GMO Claims: 100.0
- Smart Ordering: 41.1

Ingredient Scores

Ingredient	Score
Water	88
Pea Protein Isolate	61
Expeller Pressed…	52
Refined Coconut Oil	57
Rice Protein	79
Natural Flavors	74
Cocoa Butter	70
Mung Bean Protein	65
Methylcellulose	26
Potato Starch	73
Apple Extract	81
Salt	63
Potassium Chloride	36
Vinegar	90
Lemon Juice…	83
Sunflower Lecithin	62
Pomegranate Fruit…	74
Beet Juice Extract…	76

The Newness Effect

Brand   **T**rust

Claims   **R**elevance
Uniqueness

Experience **E**motional Impact
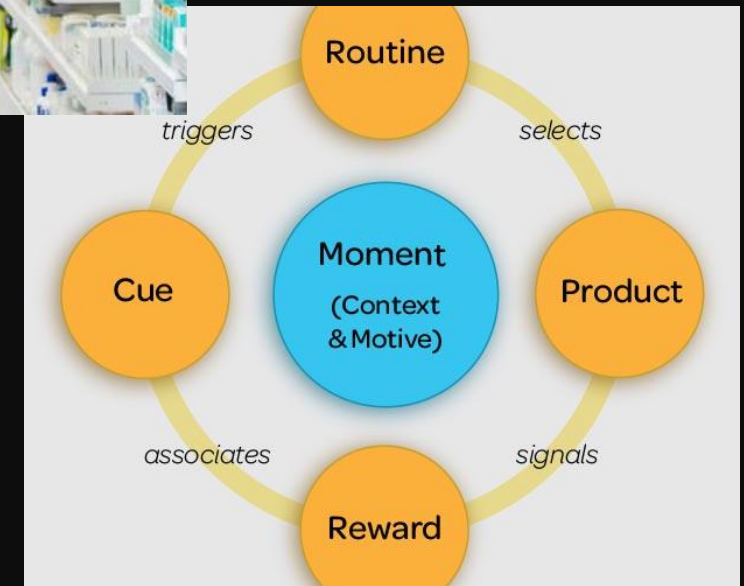
Disruption   Lift

The Newness Effect

Brand **T**rust

Claims **R**elevance
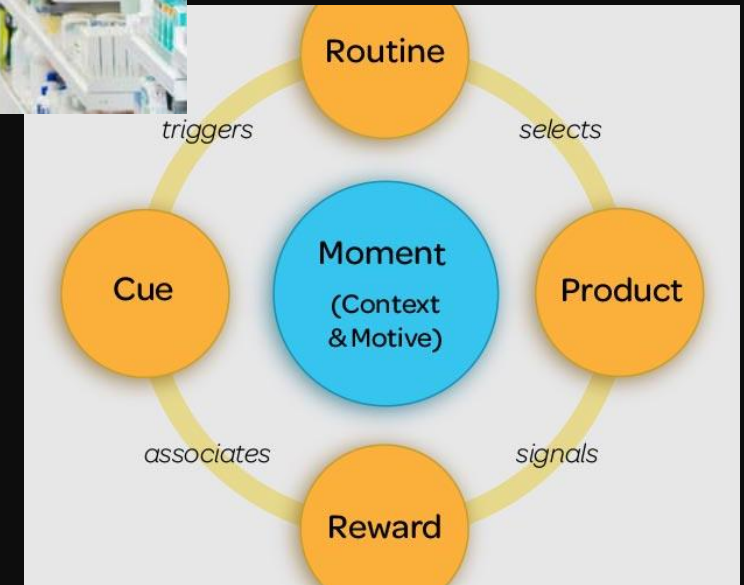
Uniqueness

Experience **E**motional Impact

Disruption **Lift**

Product Impressions
Implicit Score

Chart — Implicit Score (0 to 100.0 scale)

Attribute	Beyond Burger
Interesting Flavor / Spices	69.1
Tastes Like Meat	72.8
Appetizing Appearance	76.2
Trendy / Popular	80.2
Looks Like Real Meat	81.8
Sustainable	82.4
Different From Other Burgers	83.3
Quality Brand	86.1
Environmentally Friendly	87.3
Heart Healthy	88.9
Good Ingredients	89.5
Healthy	92.0

Legend: ▬ Beyond Burger   — Current Product

Biggest Differences vs Current

- Tastes Like Meat
- Appetizing Appearance
- Trendy/Popular
- Looks Like Real Meat

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Implicit / Explicit Test for Emotions

STEP 1: Select one image that best captures your overall thoughts and feelings about this product.

Discrete Emotions Scores Tell a Deeper Story than Liking

Attributes	Current Product	Beyond Burger
9pt Scale Mean Scores		
Overall Liking	6.7	7.0
Uncooked Appearance Liking	5.5	6.2
Cooked Appearance Liking	**6.5 B**	**7.4 A**
Aroma While Cooking Liking	6.3	6.5
Flavor Liking	6.7	7.0
Texture Liking	**6.4 B**	**7.1 A**

Emotions Score Summary N = 81	Current Product	Beyond Burger
Calm	68.2	72.8
Relaxed	66	64.8
Satisfied	59.9	66.7
Happy	**57.4 B**	**73.8 A**
Hopeful	55.2	60.8
Pleasantly Surprised	**44.8 B**	**61.1 A**
Energetic	41.7	48.5
Excited	**40.1 B**	**58.6 A**
Proud/Full of Pride	38.9	49.7
Relieved	36.4	44.4
Amused	31.8	42.6
In Love	28.4	36.7
Unsatisfied	**25.0 A**	**13.9 B**
Bored	**24.4 A**	**10.2 B**
Disappointed	**23.5 A**	**9.6 B**
Tired	**20.4 A**	**8.0 B**
Sad	17.3	10.2

Collages and Quotes Bring the Emotions to Life
Beyond Burger
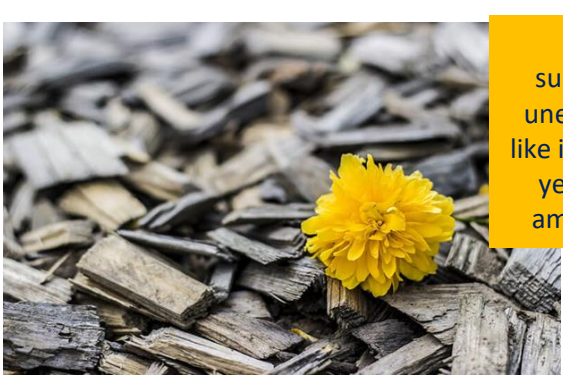
"It was a surprising and unexpected just like in this photo a yellow flower among debris"

"This plant based burger REALLY STANDS OUT! Just like this picture depicts, one bottle is different than the rest yet still fits in. It makes a bold statement among the others as it is shaped, colored and positioned differently"

"It appears to me to look one way, but I am guessing would feel another way. Similar to the product, which looked not so appealing, and tasted amazing! The lines in the image and the look of the product remind me of each other as well-organized, clean, clear in what you are getting"

"The picture is pleasant to look at. This was what I thought of the burger. It made me happy."

"I'm usually meat eating person that has thought about trying the veggie burger option, but never done it. This product opened my eyes to the possibility of adding this plant based product to our family menu. Seeing this image makes it seems like a new horizon is at hand."

The Newness Effect

_____

Brand

Claims

Experience

Disruption

Trust

Relevance

Uniqueness

Emotional Impact

Lift

The Newness Effect

_____

Brand **T**rust
Claims **R**elevance
Uniqueness
Experience **E**motional Impact
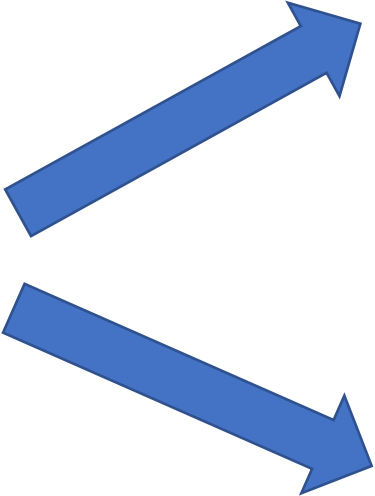
Disruption Lift
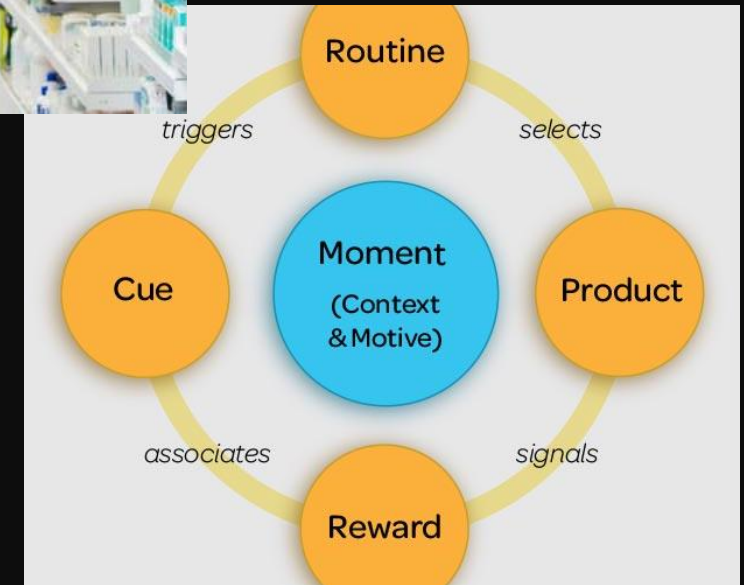
Ranked Choice from Max Diff

From these 3 plant-based burger patty products, please select the product that is the **MOST APPEALING** to you and the product that is the **LEAST APPEALING** to you.

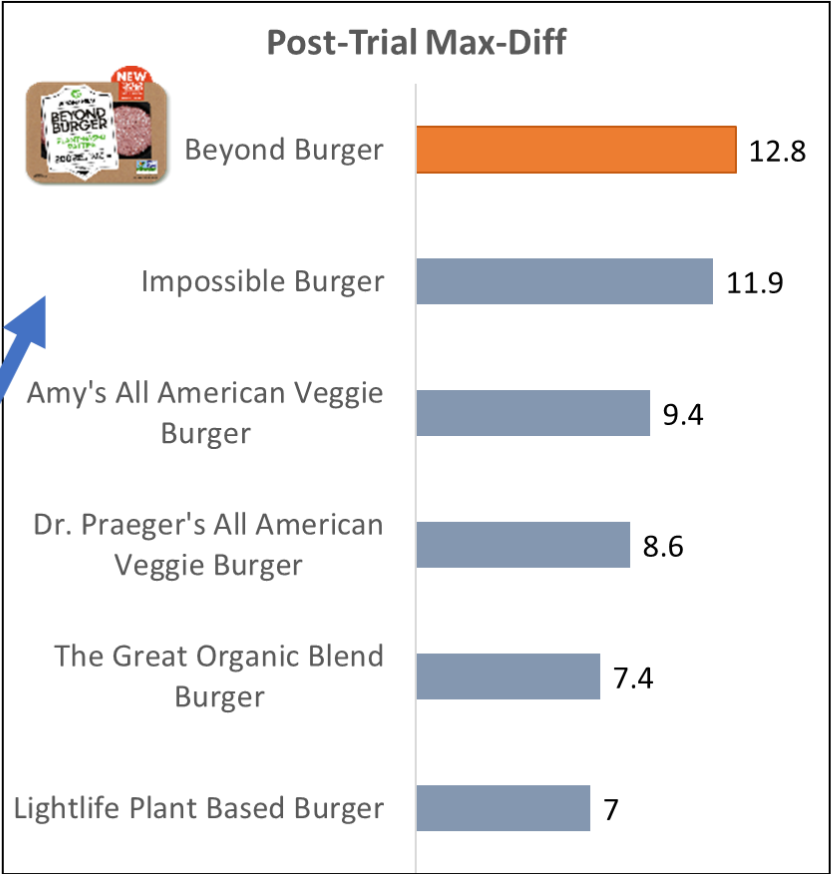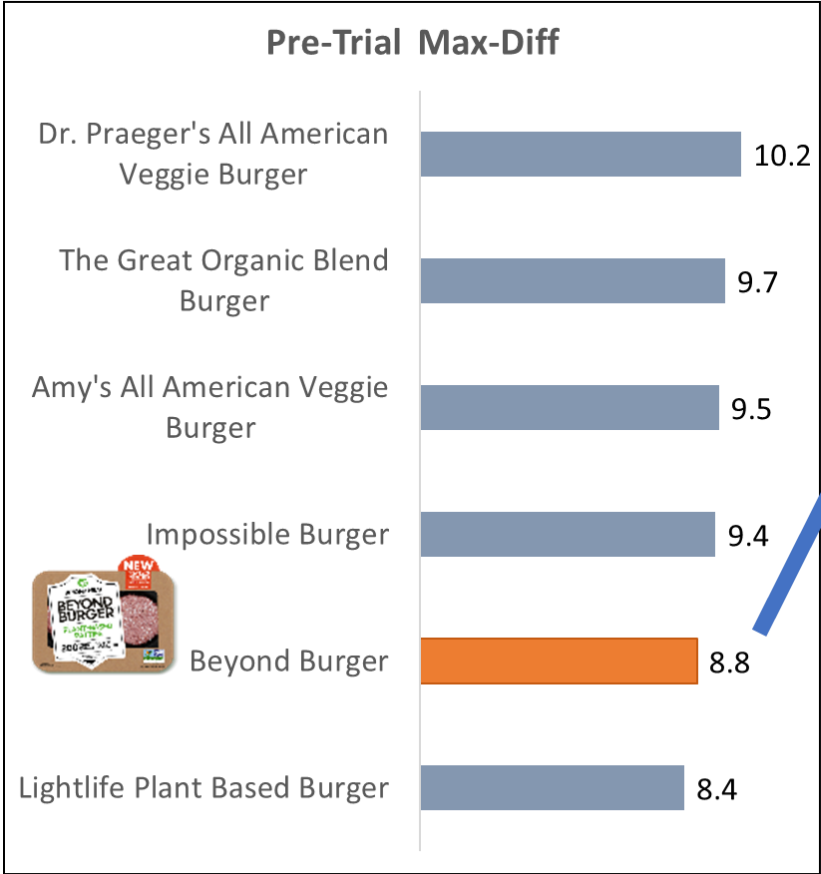*Please select one response in each column.*

	Most Appealing	Least Appealing
Boca All American Classic Burger Non-GMO Soy, High Protein **Ingredients:** Water, Soy Protein Concentrate, Reduced Fat Cheddar Cheese (Pasteurized Part-Skim Milk, Cheese Culture, Salt, Enzymes, Annatto (Color), Vitamin A (Palmitate)), Wheat Gluten, Corn Oil, Yeast Extract, Caramel Color, Modified Cellulose, Salt, Natural Flavor (Non-Meat), Dried Onion, Garlic Powder, Sesame Oil.	○	○
Gardenburger The Original Veggie Burger Natural Ingredients, Lots of Whole Grain, Good Source of Fiber **Ingredients:** Cooked Brown Rice (Long Grain Brown Rice, Water), Button Mushrooms, Rolled Oats, Mozzarella Cheese (Pasteurized Part-Skim Milk, Cultures, Salt, Enzymes), Onions, Water, Hydrated Wheat Bulgur (Water, Bulgur Wheat), Cremini Mushrooms, Spices, Portabella Mushrooms, Cheddar Cheese (Pasteurized Milk, Salt, Enzymes, Cultures, Annatto Color), Contains 2% or less of Salt, Natural Flavors, Modified Vegetable Gum, Garlic Powder, Yeast Extract, Citric Acid, Whey, Malted Barley, Annatto Color, Malted Barley Flour, Onion Powder, Mushroom Powder, Guar Gum, Annatto Extract (Color), Turmeric Extract (Color), Soy Lecithin.	○	○
Beyond Burger No Soy, No Gluten, Non-GMO Project Verified, High Protein **Ingredients:** Water, Pea Protein Isolate, Expeller-Pressed		

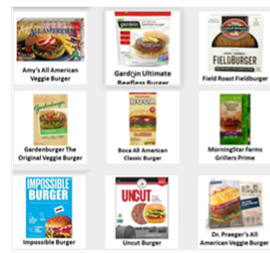Probability "Most Appealing"

Probability "Least Appealing"

Category LIFT

Pre-Trial Max-Diff

Dr. Praeger's All American Veggie Burger	10.2
The Great Organic Blend Burger	9.7
Amy's All American Veggie Burger	9.5
Impossible Burger	9.4
Beyond Burger	8.8
Lightlife Plant Based Burger	8.4

Post-Trial Max-Diff

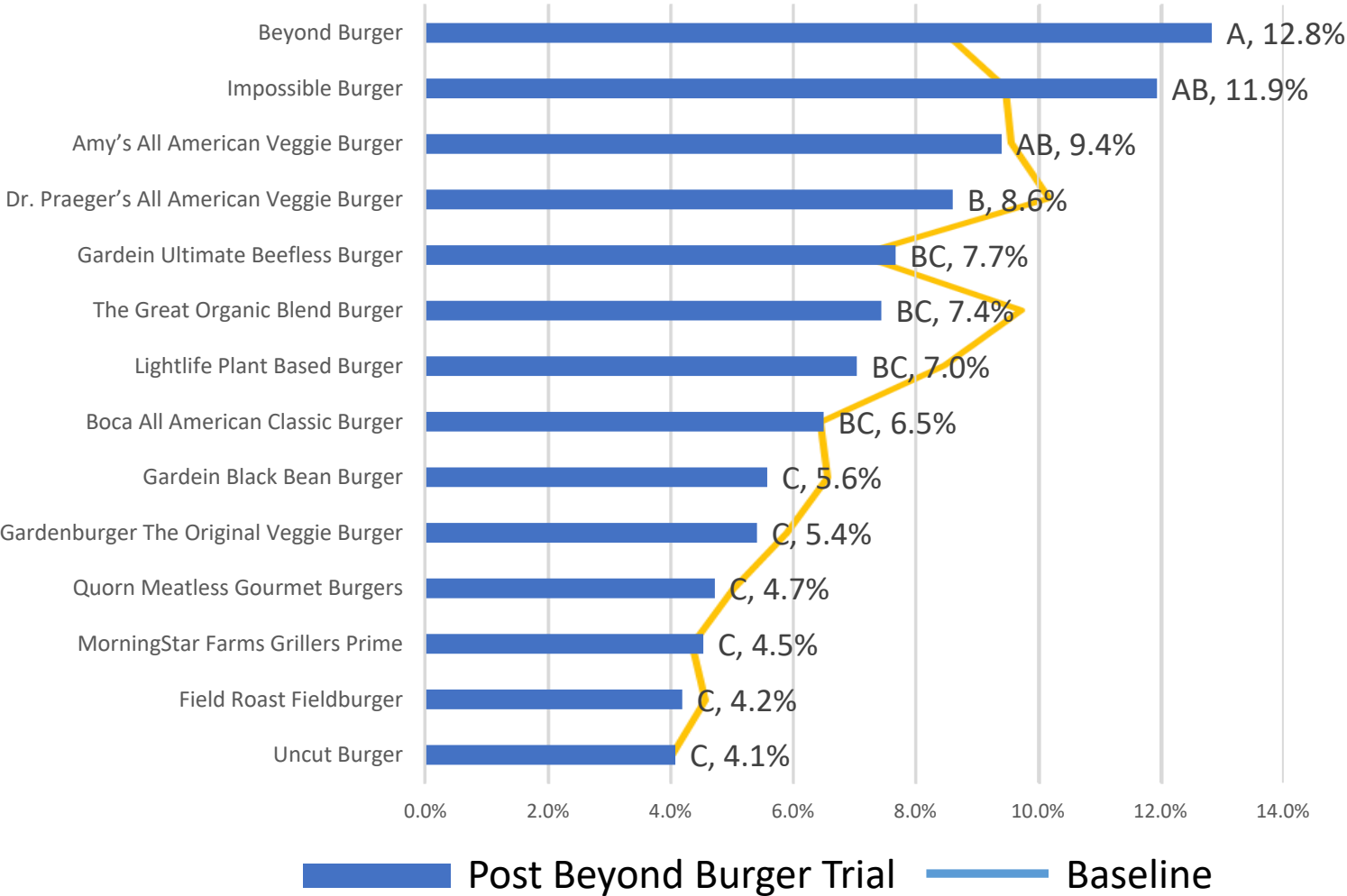|	
Beyond Burger	12.8
Impossible Burger	11.9
Amy's All American Veggie Burger	9.4
Dr. Praeger's All American Veggie Burger	8.6
The Great Organic Blend Burger	7.4
Lightlife Plant Based Burger	7

BEYOND BURGER®

46% LIFT

versus

8%

Average All Products

Beyond Burger Trial Results in Taking Share

Gained Share
- Beyond Burger (Trial Effect)
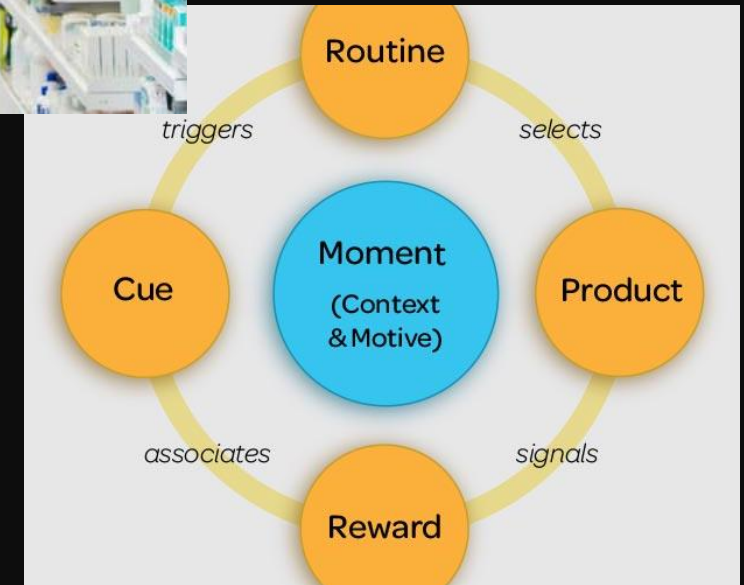- Impossible Burger (Halo Effect)

Lost Share
- Dr. Praeger's
- The Great Organic Blend
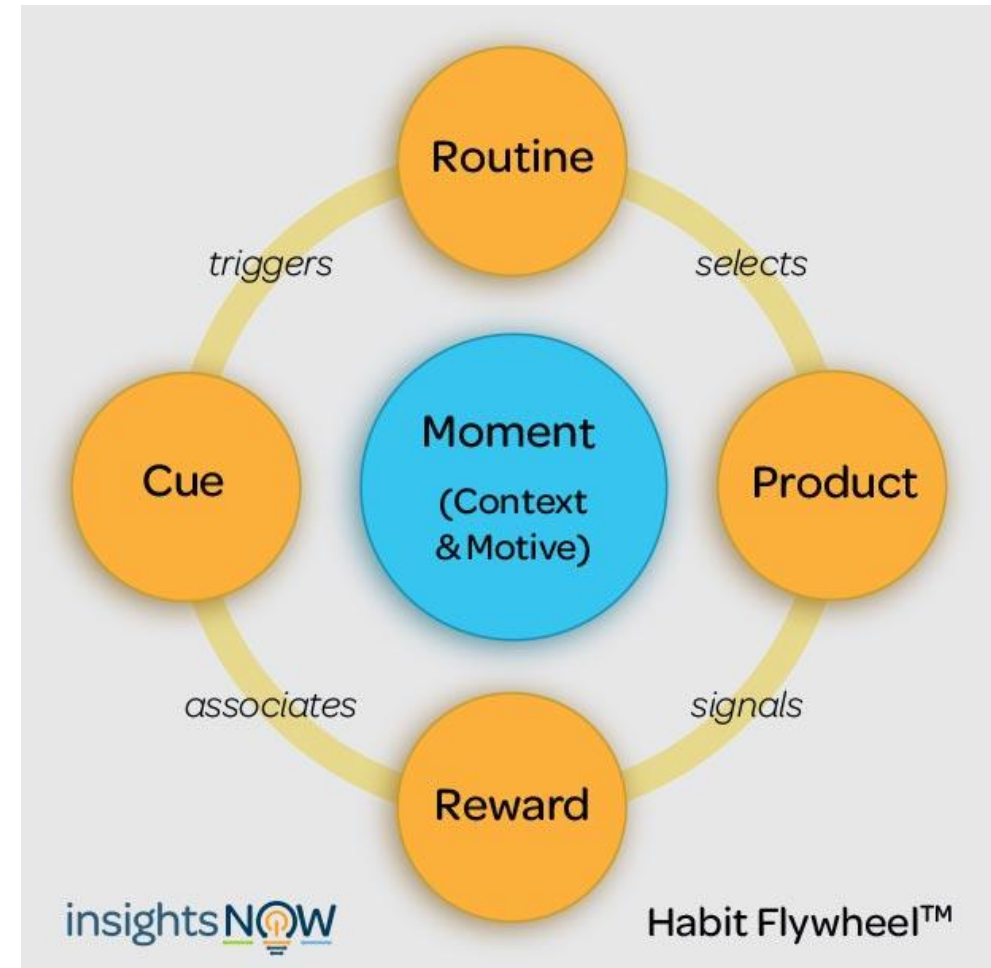- LightLife

The Newness Effect

Brand   **T**rust
Claims   **R**elevance
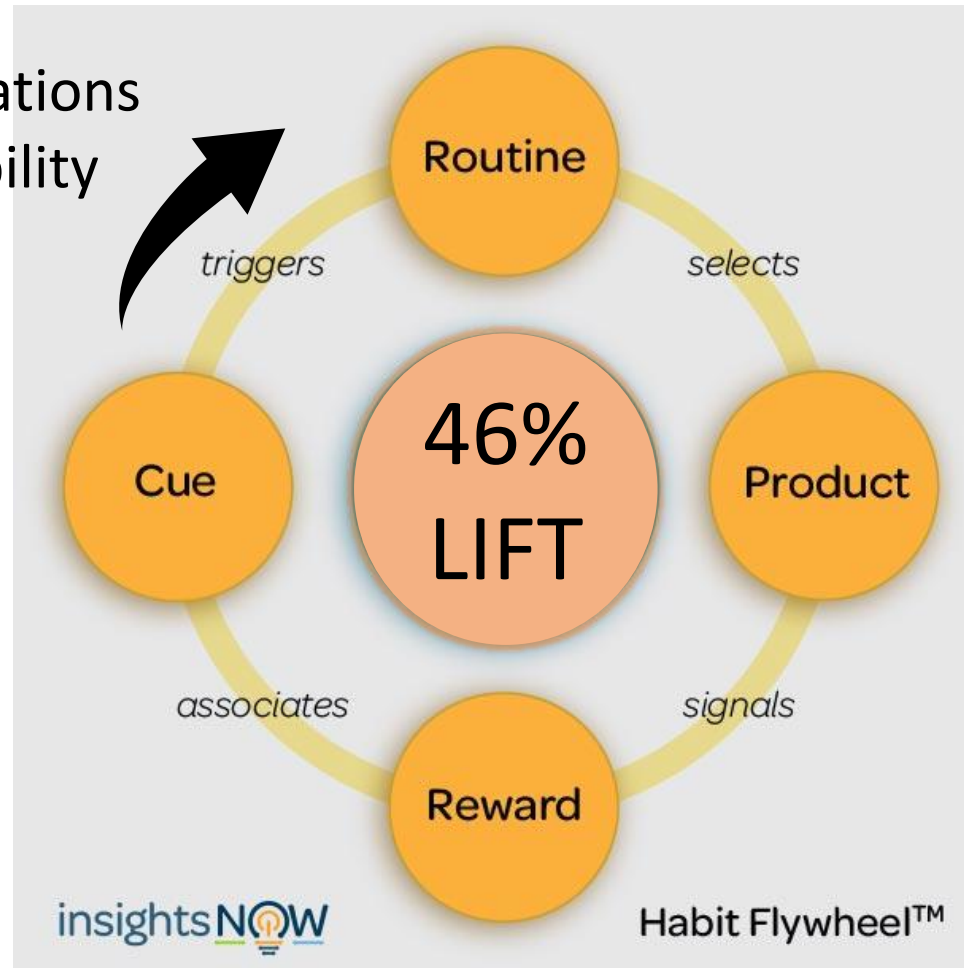   **U**niqueness
Experience **E**motional Impact

Disruption   **Lift**

Newness Effect → Habit Flywheel

Newness Effect → Habit Flywheel → TRUE Metrics

Marketing Communications and Availability

Relevant & Unique Claims
Non-GMO Project Verified
Organic

Product Impressions
Tastes Like Meat
Appetizing Appearance
Trendy/Popular
Looks Like Real Meat

Emotional Impact
Less Disappointment
Less Dissatisfaction
Less Bored and Tired
More Happy
More Excited

Trusted Brand
Innovative
Trendsetting
Desirable
Good Value
Quality
Fair
Reliable

Newness Effect

InsightsNow - Booth 801

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CEO
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