

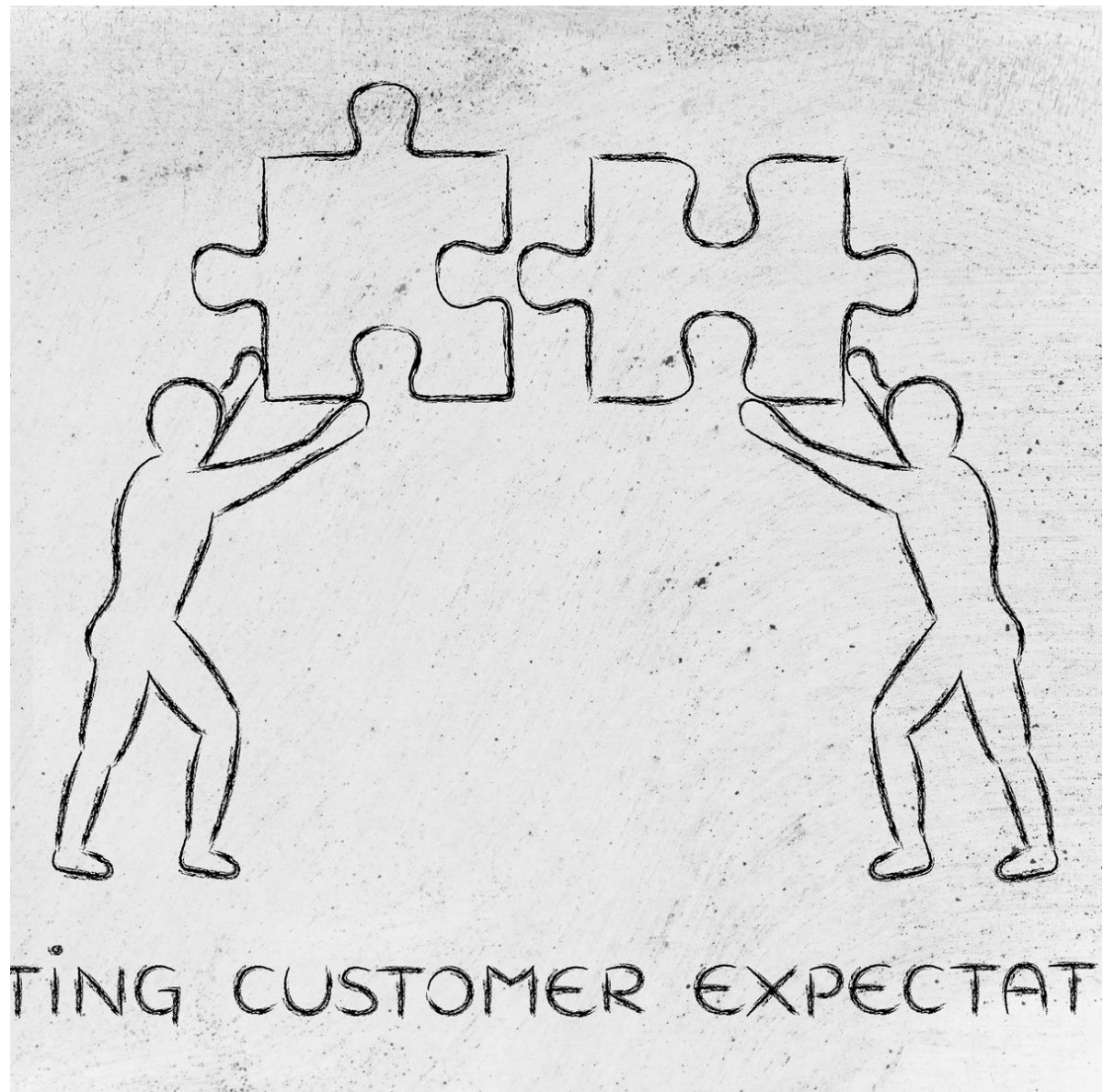


## **The New Customer:** *Global Survey of what consumers want and how company operations must change*

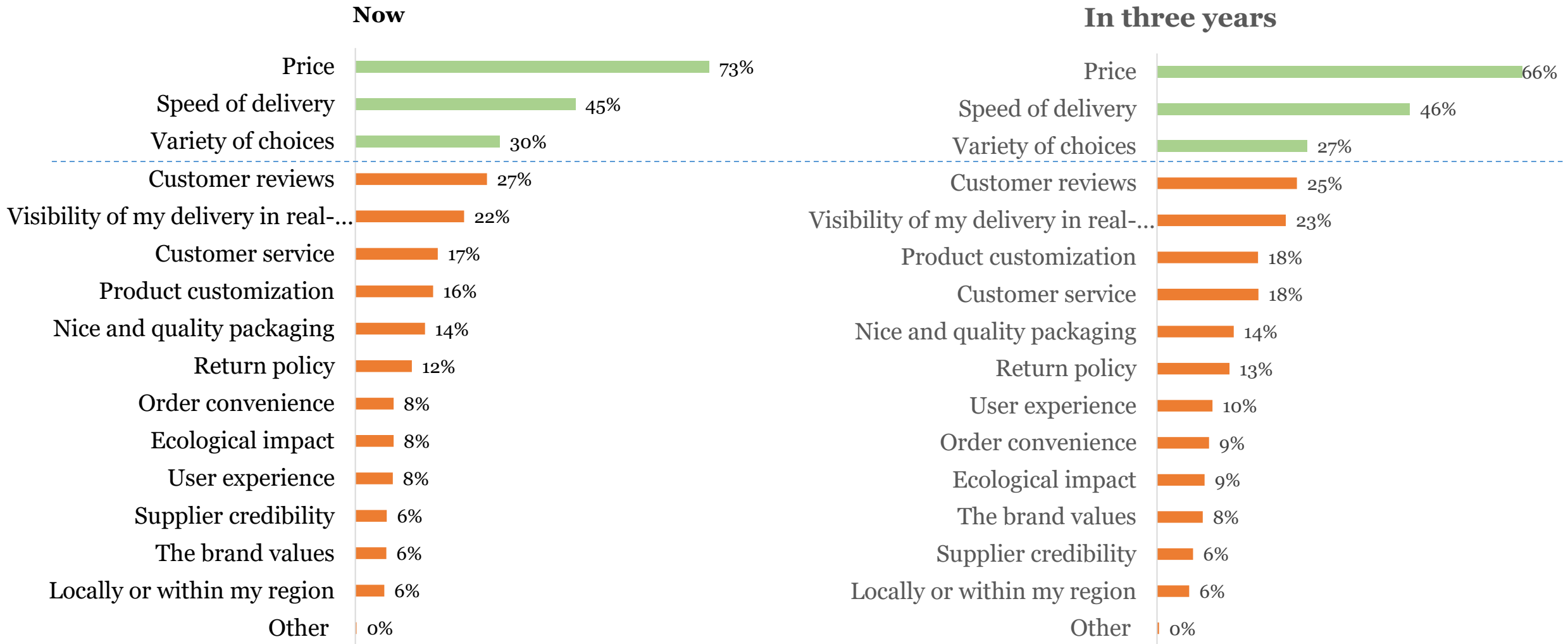
# Headlines

- The good news is that we now know what consumers want, and what they want is not going to change much over the next three years.
  - The bad news is that consumers want something different than what most supply chains can currently deliver
- “Make it for me my way or standardize it, but current practice is not what I want”
- Speed matters... It matters so much that people will pay for it!
- The market is split between consumers who prefer personal contact, automated contact, and a hybrid of the two
- Social justice and social values matter, all other things being equal
- More than half of consumers are content with how much of their data is collected and how it is used, but many are uneasy

# Consumer Expectations



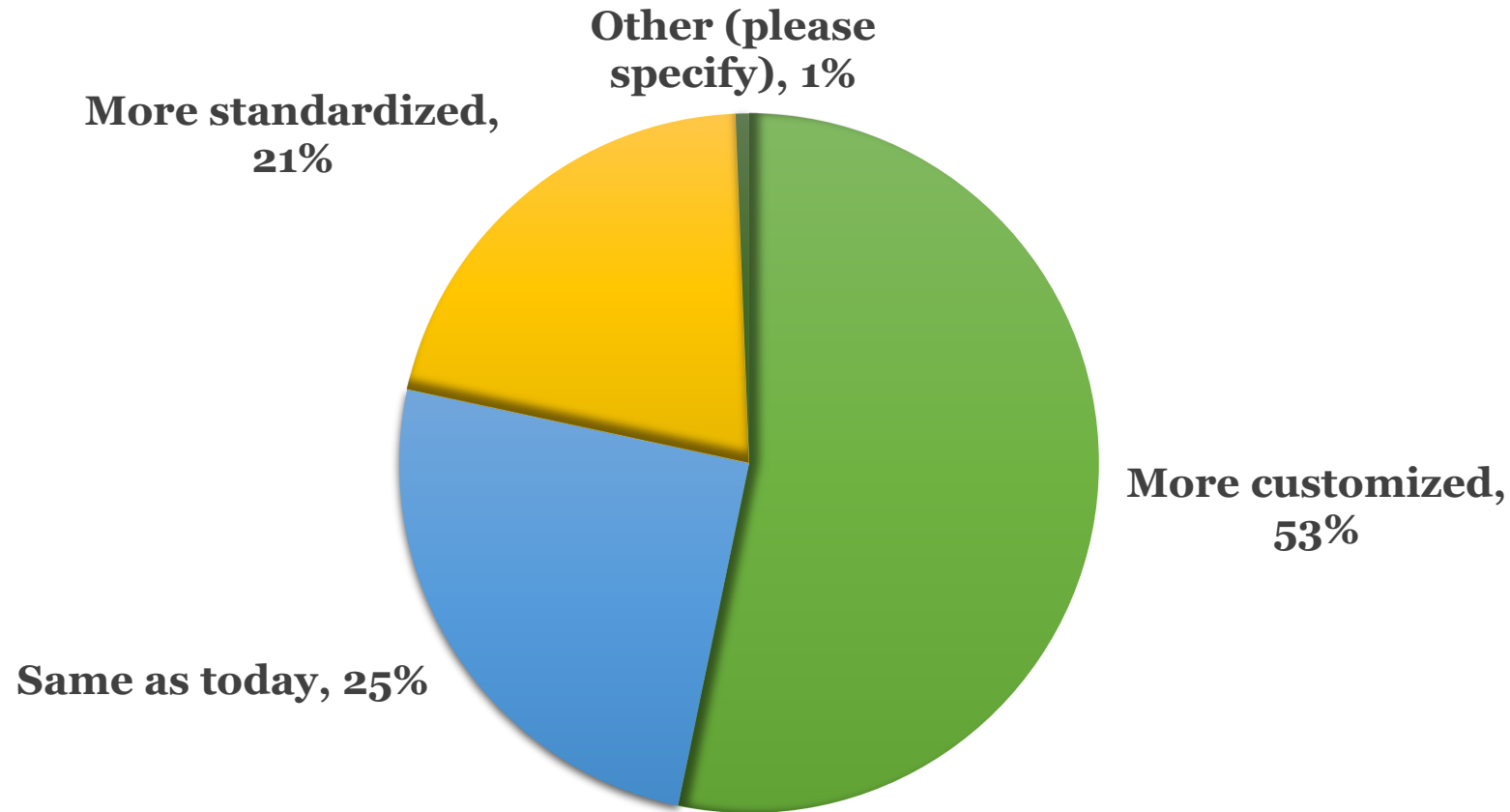
# New consumers expectations have been set and will remain largely the same over the next 3 years.



**Q1. Please select the top 3 factors that will help you make a buy decision now.**

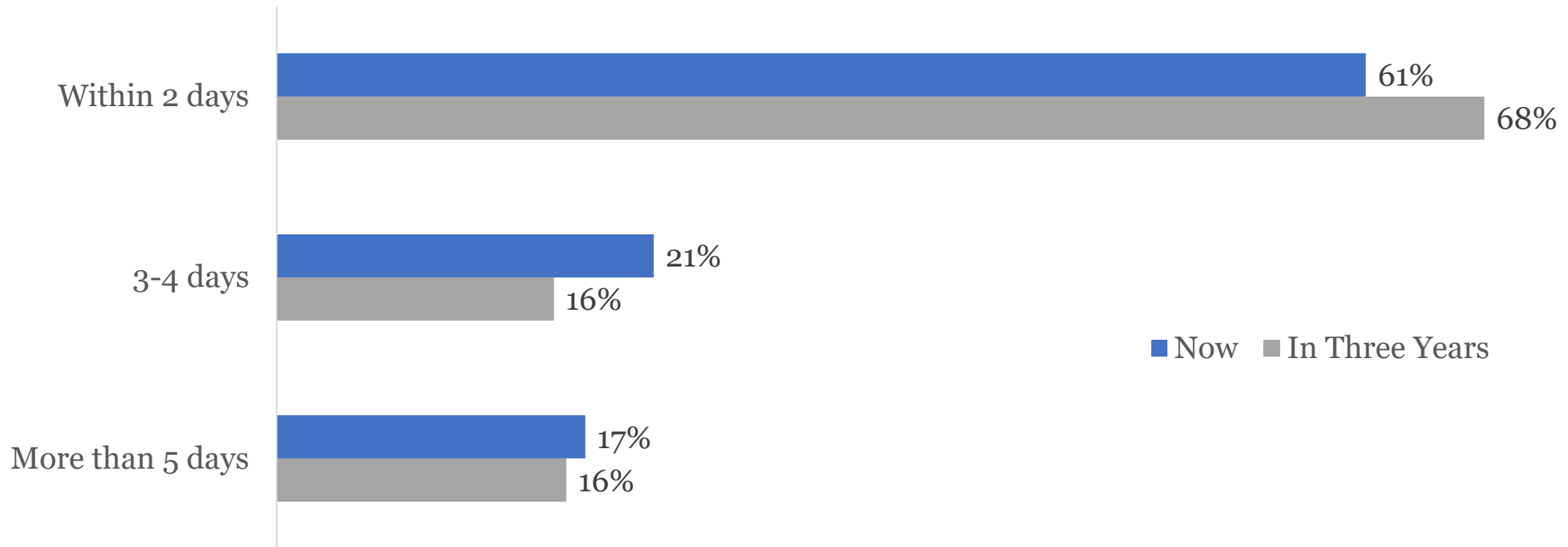
**Q2. Please select the top 3 factors that will help you make a buy decision over the next three years**

**“Make it for me my way or standardize it, but current practice is not what I want”. Customization matters for most.**



**Q. You would like for the products you are currently buying to be is:**

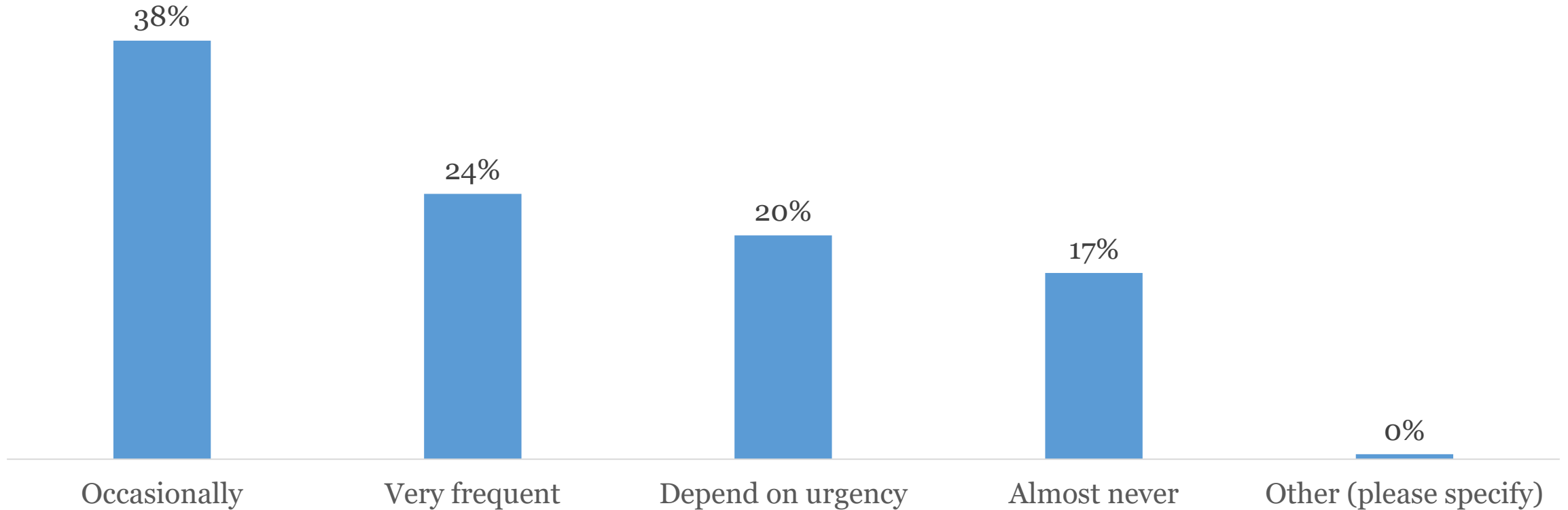
# Speed matters... It matters so much that people will pay for it!



**Q1. What do you want to see delivery times now?**

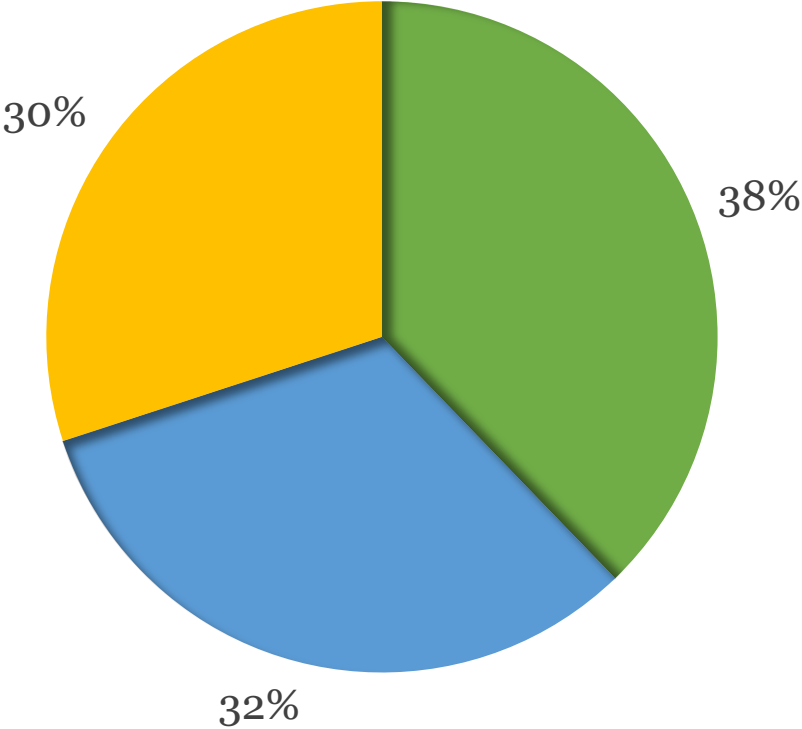
**Q2. What do you want to see delivery times in three years?**

**Around 24% of the customers are willing to pay more frequently for a faster delivery over the next three years.**



**Q. Are you willing to pay more for a product for faster delivery over the next three years?**

# The market is split between customers who prefer personal contact, automated contact, and a hybrid of the two

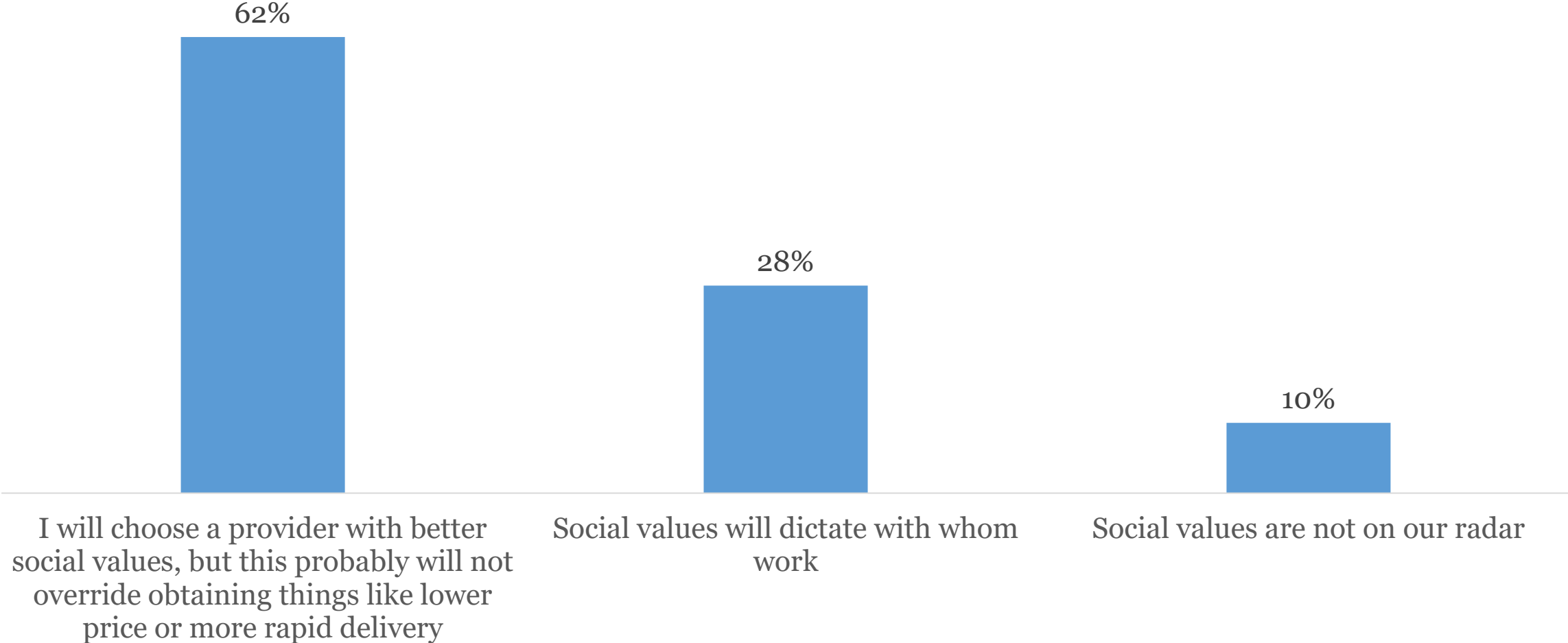


- I prefer a combination of automated service as well as people service in the future
- Close personal service will always be what I want
- I prefer to deal with AI, voice bots and automated routines for many of my transactions especially as the technology gets better

**Q. What kind of interactions do you want with the companies that make what you buy?**

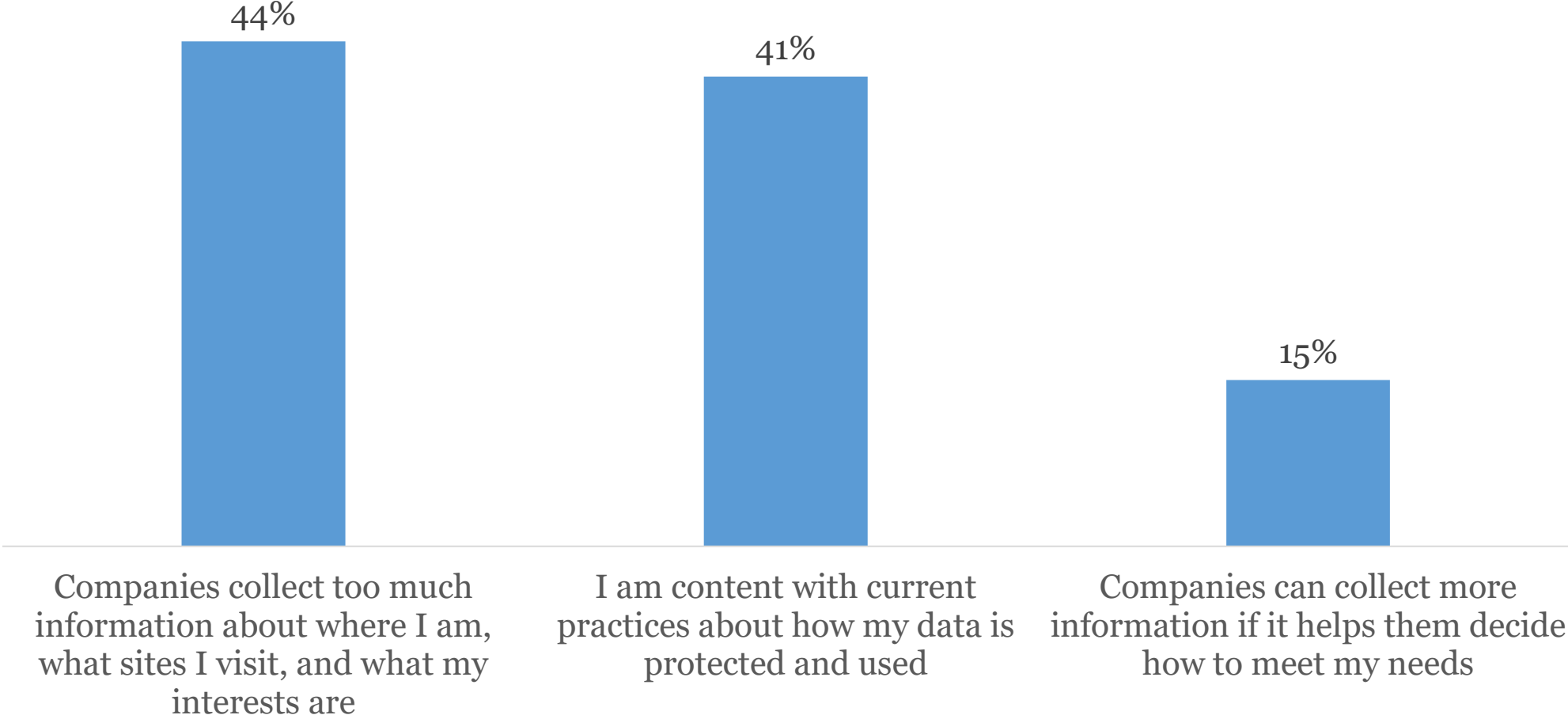


# Social justice and social values matter, all other things being equal



**Q. Will a company’s social values for the environment and social justice change the way that you choose a supply chain provider?**

# More than half of customers are content with how much of their data is collected and how it is used or would even share more!



**Q. How do you feel about data privacy versus getting you the product that you need using your information (excluding Personal Identification Information (PII))?**

# Digital Supply Chain Implications

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- Recognize that the New Customer wants something different and quantify it ... You have New Customer sub segments that have different desires
- Re-imagine a supply chain that can deliver what the New Customer wants
- Set specific goals for across several dimensions for supply chain change
  - Product customization
  - Speed
  - Automation
  - Privacy
- Share data with employees, suppliers and market facing partners
- Conduct digital supply chain transformation that will deliver what the New Customer wants....



# Call To Action

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- Get the supply chain transformation team focused on the New Customer
- Build an implementation plan that is practical, measurable and bold (hint: near customer location is key!)
- Manage demand, don't just respond to it
- Grow people and get new ones that get the New Customer
- Equip the team with the AI/ML technology and make sure that your technology stack hangs together for the customer and employee
- Begin and end every supply chain meeting with a discussion of how actions help the customer



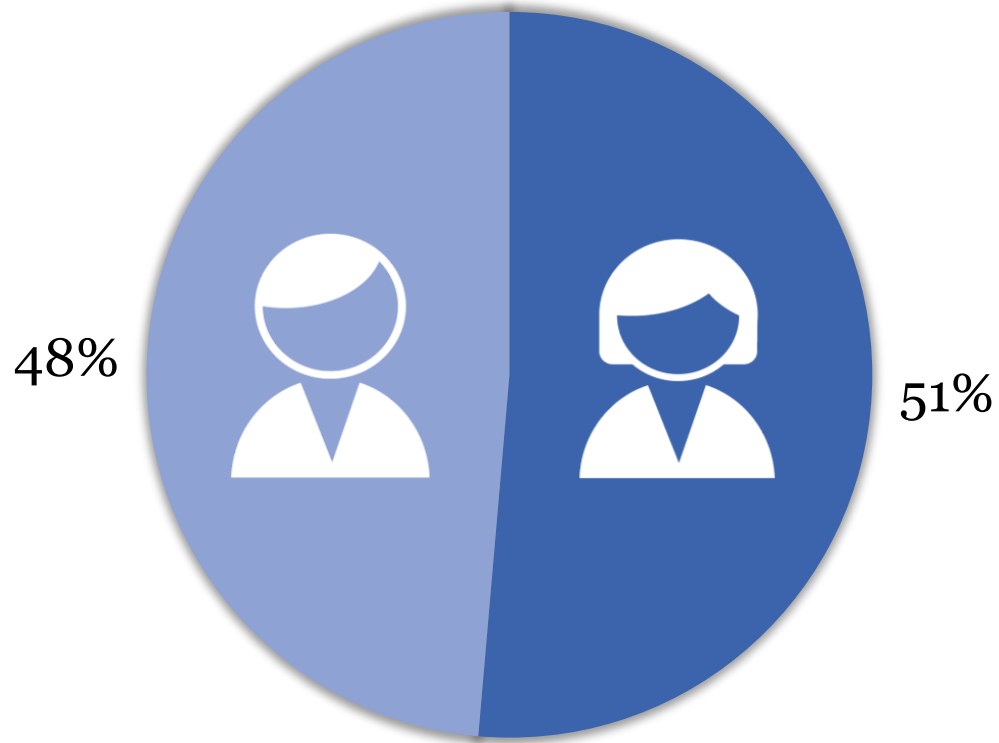
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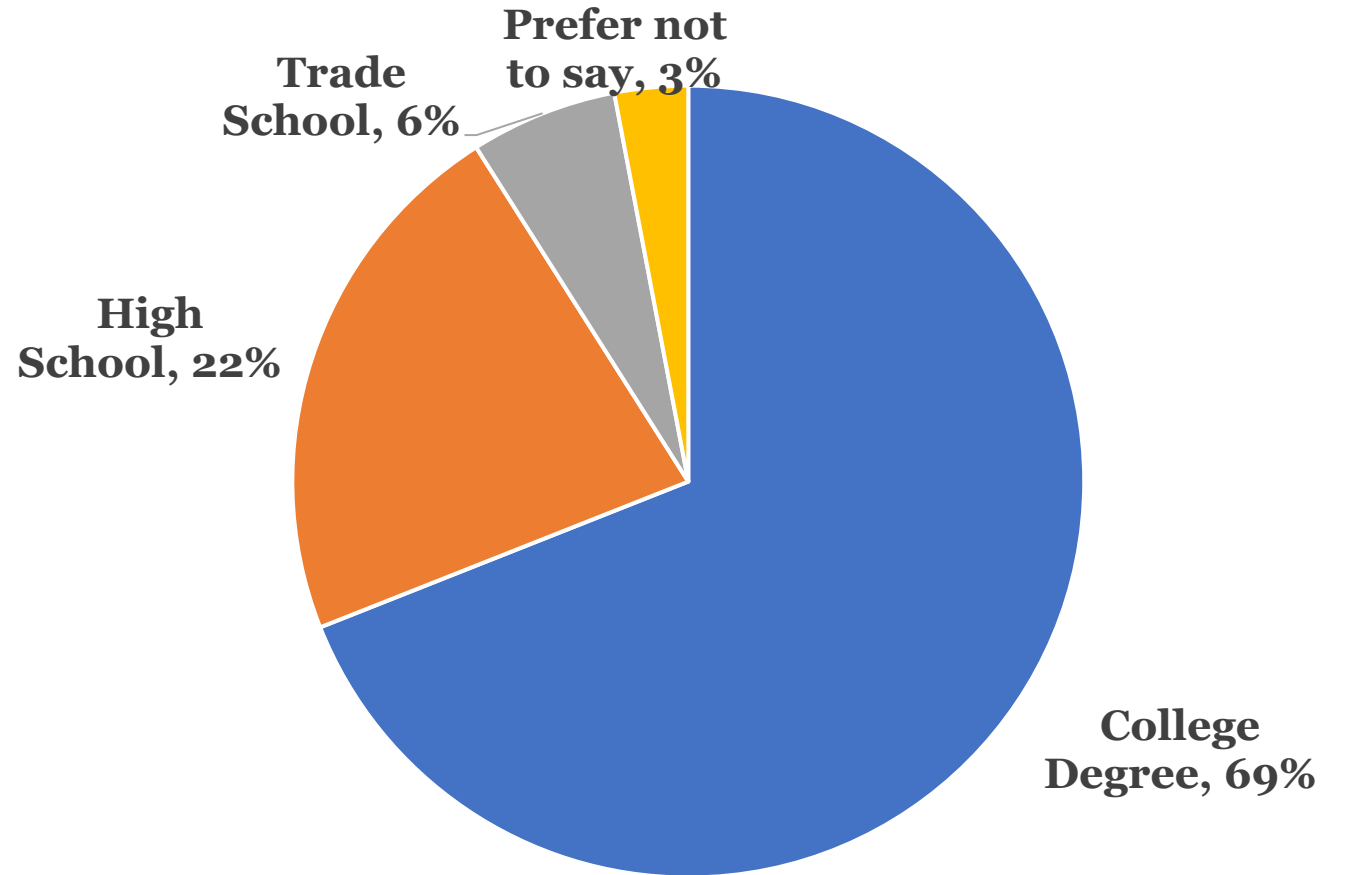
# Survey Demographics



# Gender



# Level of Education



# Geographical Distribution

