MARKETING PLAN

Everyday Extraordinary

A twelve-month always-on programme to move Lumen from a gifting brand to a self-purchase brand, built around the everyday cook rather than the occasion buyer.

$1.84M	+38%	$46	12 mo
WORKING BUDGET	SELF-PURCHASE REVENUE	BLENDED TARGET CPA	ALWAYS-ON PROGRAMME

PERIOD	BUDGET	OWNER	VERSION
January – December 2027	**$1,840,000**	**Renata Silva, VP Marketing**	**v3.1 · August 4, 2026**

1 Where We Are

Lumen has grown 22% a year for four years on the strength of gifting. Two thirds of revenue lands between late October and Christmas Eve, and 71% of first orders are shipped to an address other than the buyer's. The business is healthy and dangerously seasonal: in the five months from February to June, paid media spends at a loss on every channel except branded search.

The opportunity is not new customers so much as new occasions. Our repeat rate among self-purchasers is 2.4x that of gift buyers, and their second order arrives a median 94 days after the first. We have simply never marketed to them deliberately — the creative, the offers and the media calendar are all built around a giver buying for someone else.

This plan reallocates budget out of the fourth-quarter peak, where we are buying share at increasing cost, and into a year-round programme aimed at the everyday cook. The peak still runs, at 34% of budget rather than 58%, and with creative that recruits self-purchasers rather than optimising the gift basket.

1.1 What the research told us

- **Gift recipients are our best untapped segment** — 38% of recipients open a Lumen box for the first time each December, and only 6% of them ever buy for themselves. They already have the product in their kitchen.
- **Price is not the objection, permission is** — In 42 interviews, the phrase that recurred was some version of "I'd never spend that on myself." Discounting did not move this group in last year's spring test; a durability guarantee did.
- **Search demand is flat but shifting in intent** — Category search volume is up only 4% year on year, but "best pan for" style queries are up 31%. Buyers are researching use cases, not brands.
- **Our creative reads as luxury, not as daily** — Ad testing scored our current work high on "beautiful" and low on "for someone like me." The two spring concepts that inverted this delivered a 24% better cost per acquisition.
- **Retention economics are strong once the second order lands** — Customers reaching a second order have a 4.1x higher two-year value. Everything in this plan optimises toward that second order rather than toward first-order volume.

2 Goals and KPIs

Five goals, each with a single primary KPI and a named owner. Secondary metrics are tracked but do not trigger budget decisions; only the primary KPI does.

GOAL	PRIMARY KPI	BASELINE	TARGET	BY	OWNER
Grow self-purchase revenue The structural fix for seasonality	Self-purchase net revenue	$6.2M	**$8.6M**	Dec 2027	R. Silva

GOAL	PRIMARY KPI	BASELINE	TARGET	BY	OWNER
Reduce Q4 revenue concentration De-risk the annual plan	Share of revenue in Oct–Dec	66%	**54%**	Dec 2027	R. Silva
Convert gift recipients Cheapest addressable audience we own	Recipient-to-buyer rate	6%	**14%**	Sep 2027	T. Alvarez
Improve blended acquisition efficiency Growth must not come from paying more	Blended CPA	$58	**$46**	Dec 2027	J. Moore
Lift second-order rate Where two-year value is decided	Second order within 120 days	19%	**29%**	Dec 2027	T. Alvarez

3 Audience

Three personas carry the plan. They are drawn from a segmentation of 41,000 customer records validated against 42 depth interviews conducted in April 2026, and each maps to a distinct media and creative approach rather than to a demographic bracket.

MC

The Method Cook

Cooks 5+ nights a week, 28–44

> *"I don't need another gadget. I need the one pan to stop warping."*

SEGMENT SIZE
1.9M households

JOB TO BE DONE
Replace failing equipment without researching for a week

BUYING TRIGGER
Something breaks, or a recipe fails twice

OBJECTION
Sceptical of premium pricing without proof of durability

BEST CHANNELS
Search, YouTube, long-form review

NN

The New Nester

First real kitchen, 24–34

> *"I'm building the kitchen I want to keep, one piece at a time."*

SEGMENT SIZE
1.1M households

JOB TO BE DONE
Assemble a coherent kitchen over 18–24 months

BUYING TRIGGER
A move, a marriage, or a first proper job

OBJECTION
Worried about buying the wrong thing first

BEST CHANNELS
Social video, creator, email

GR

The Gift Recipient

Owns Lumen, has never bought it

> *"It was a present. I didn't know they made anything else."*

SEGMENT SIZE
310K known individuals

JOB TO BE DONE
Get more out of a product already loved

BUYING TRIGGER
Positive first use, then a gap in the set

OBJECTION
Never gave themselves permission to spend it

BEST CHANNELS
Owned email, SMS, retargeting

3.1 Messaging pillars

PILLAR	PROOF WE LEAD WITH	PRIMARY PERSONA
Built to outlast A 25-year guarantee, stated plainly	Independent warp and coating tests published in full, including where competitors beat us on two of nine measures	Method Cook
Start with one You do not need the set	A guided "first three pieces" path with honest advice on what to skip, and a trade-up credit toward the set later	New Nester
The rest of the kitchen What pairs with what you already own	Recipient-specific email showing the exact pieces that complement the item they were gifted	Gift Recipient
Everyday, not occasion Tuesday cooking, not dinner parties	Creative shot in real kitchens with real mess, replacing the studio-lit hero photography used since 2023	All three

4 Channel Mix

Working media is split across six channels. Share bars show each channel's proportion of the working budget; production, agency fees and tooling sit outside this table and appear in the budget split below.

CHANNEL	ROLE IN THE FUNNEL	BUDGET	SHARE	TARGET REACH	TARGET CPA
Paid search Brand, generic, PLA	Capture existing demand; defend brand terms against three aggressive resellers	$372,000	27%	4.1M	$31
Paid social Video, collection, retargeting	Recruit New Nesters and retarget site and recipient audiences	$331,000	24%	22M	$49
Online video YouTube pre-roll, CTV	Carry the durability proof to Method Cooks in a format long enough to show it	$248,000	18%	9.6M	$62
Creator partnerships Long-form, integration	Borrowed credibility for the guarantee claim; 14 creators on annual terms	$193,000	14%	6.2M	$44

CHANNEL	ROLE IN THE FUNNEL	BUDGET	SHARE	TARGET REACH	TARGET CPA
Owned email & SMS Lifecycle, recipient flows	Convert gift recipients and drive the second order; highest-return channel we have	$124,000	9%	1.4M	$11
Retail media Marketplace sponsored	Defend share on the two marketplaces where 21% of category search now begins	$110,000	8%	3.3M	$57
	Total working media	**$1,378,000**	**100%**	**46.6M**	**$46**

5 Budget Split

The full $1.84M divides into working media, the creative production it depends on, and the fees and tooling required to run it. Working media is 75% of the total, up from 68% last year, funded by consolidating two agency retainers into one.

Working media — $1,378,000 · Creative production — $221,000 · Agency & creators — $147,000 · Tooling & measurement — $94,000

ALLOCATION	Q1	Q2	Q3	Q4	YEAR
Working media	298,000	312,000	296,000	472,000	**1,378,000**
Creative production	94,000	41,000	38,000	48,000	**221,000**
Agency & creators	36,750	36,750	36,750	36,750	**147,000**
Tooling & measurement	31,000	21,000	21,000	21,000	**94,000**
Total ($)	**459,750**	**410,750**	**391,750**	**577,750**	**1,840,000**

6 Milestone Calendar

Production runs one quarter ahead of media. The two hard deadlines are the spring durability campaign, which depends on the independent test results landing in February, and the peak build, which must be locked before the October media flight opens.

WORKSTREAM	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Brand platform relaunch	build	▲										

WORKSTREAM	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Durability proof campaign	build	test	▲									
First three pieces path		build	build	▲								
Recipient conversion flows					build	▲						
Creator programme	sign						sign					
Peak (gifting) programme						plan	shoot	build	lock	▲		
Measurement & incrementality	set			test			test				test	

Launch or hard deadline · In market · Build or production

7 Measurement and Governance

Reported performance comes from one source: the marketing data model, reconciled weekly to finance-recognised revenue. Platform-reported conversions are used for in-platform optimisation only and never appear in a performance review, because the double-counting between paid social and paid search made last year's reporting unusable above channel level.

Three geo-based incrementality tests run in April, July and November, each holding out 12% of markets for four weeks. The April test measures online video, which is the largest line we cannot currently attribute; the July and November tests measure paid social and the peak programme respectively. Budget is not reallocated between channels on last-click evidence alone.

RITUAL	PURPOSE	CADENCE	CHAIR
Performance stand-up	Pacing, creative fatigue, and anything broken in the last seven days	Weekly, 30 min	J. Moore
Creative review	Approve concepts one quarter ahead of flight; kill or extend running work on evidence	Fortnightly	R. Silva
Growth council	Reallocate budget between channels; only forum with authority to move money	Monthly	R. Silva
Quarterly business review	Goal progress against the five KPIs, incrementality findings, and next-quarter commitments	Quarterly	CFO

DECISION RULES

- A channel missing its target CPA by more than 20% for three consecutive weeks is cut to 60% of pacing until the next growth council.
- No more than 15% of the annual working budget may be reallocated between channels without CFO approval.
- Creative is retired at a frequency of 4.5 or a 30% decline from its launch click-through rate, whichever comes first.
- The peak programme floor is $472,000; growth in the always-on programme may not be funded by dropping below it.
- Any test that would take more than six weeks to read is not run; we choose a smaller question instead.