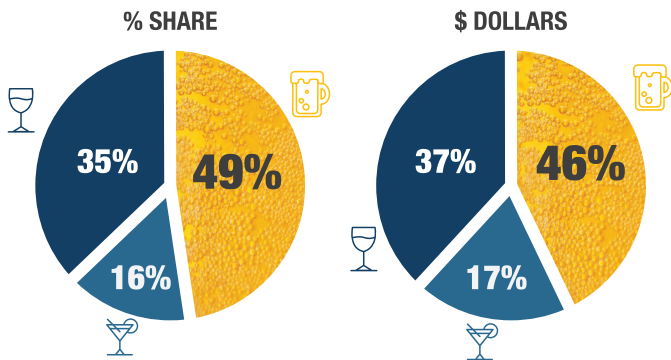


WHY BEER

Off-Premise / Chain

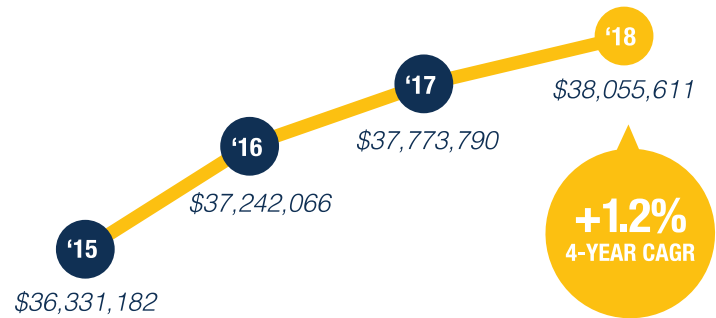
BEER IS #1

Beer is the largest alcohol beverage category



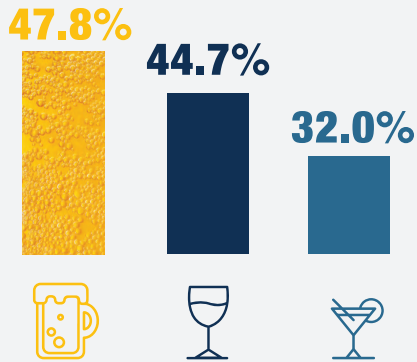
AND GROWING

Beer \$ sales trend ('000)

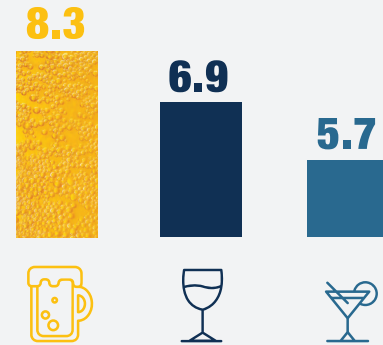


MORE SHOPPERS, MORE OFTEN

Beer reaches the highest number of consumers and drives the most trips



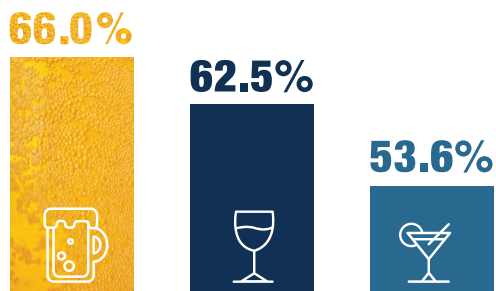
Household Penetration 2018



Trip Frequency 2018

REPEAT BUYERS

Beer drives higher repeat buyers than wine & spirits



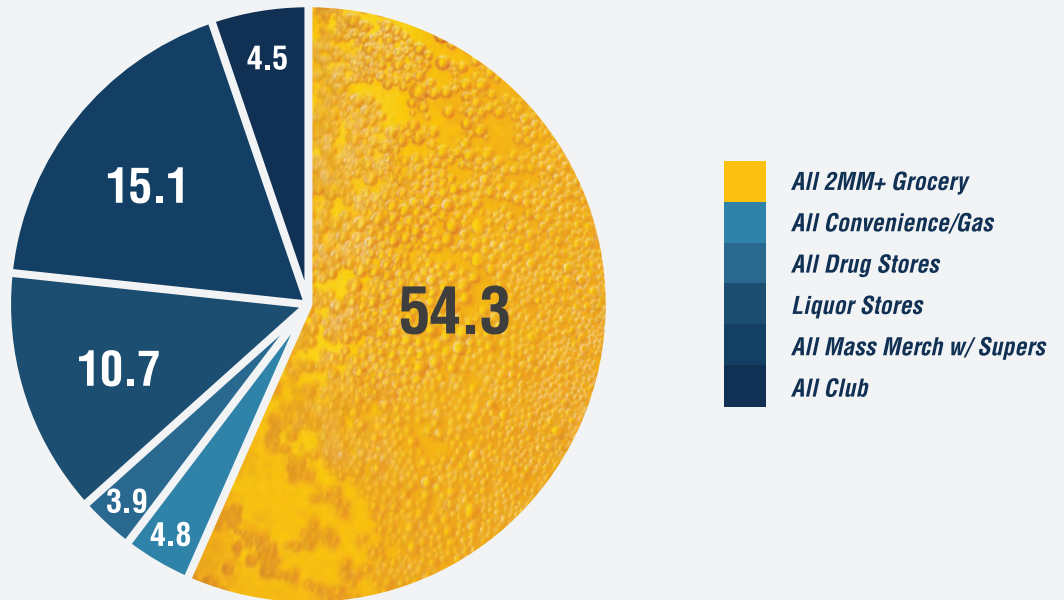
BASKET RINGS

Beer delivers a high value basket ring



LOYAL SHOPPERS

Beer shoppers are the most loyal to grocery



SHARE OF WALLET

BEER BRIEF



Beer has higher loyalty across channels than wine & spirits



Beer has among the highest \$ growth trends in all CPG



Beer reaches the highest number of consumers and drives the most trips

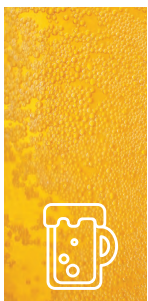


Beer drives strong basket rings

BUYER CONVERSION

Beer has higher conversion compared to wine and spirits

74.0%



67.8%



41.9%



OUR ASK:

MORE MERCHANDISING OPPORTUNITIES

MORE PROMOTIONAL FREQUENCY

MORE ADS

MORE DISPLAYS

MORE SPACE

Nielsen is a global measurement and data analytics company that provides a complete and trusted view of consumers and markets worldwide. Our approach marries proprietary Nielsen data with other data sources to help clients understand what's happening now, what's happening next, and how to best act on this knowledge at a national, regional and local market level.

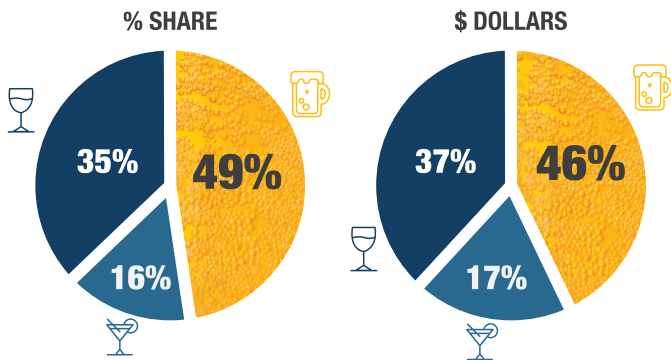
Source: Nielsen Homescan Premium

WHY BEER

Off-Premise / C-Store

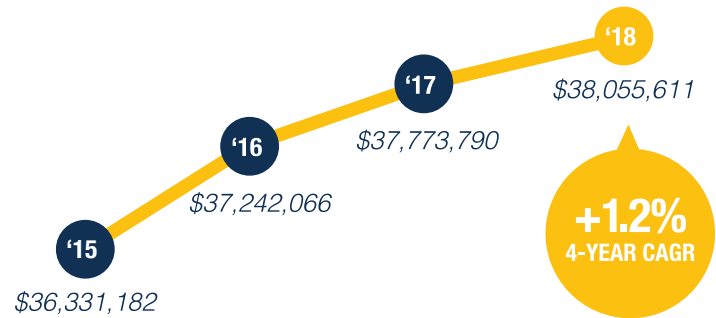
BEER IS #1

Beer is the largest alcohol beverage category



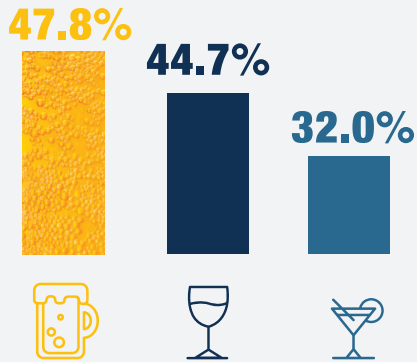
AND GROWING

Beer \$ sales trend ('000)

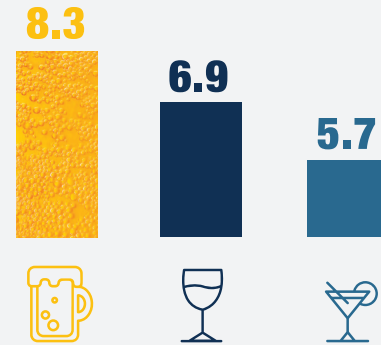


MORE SHOPPERS, MORE OFTEN

Beer reaches the highest number of consumers and drives the most trips



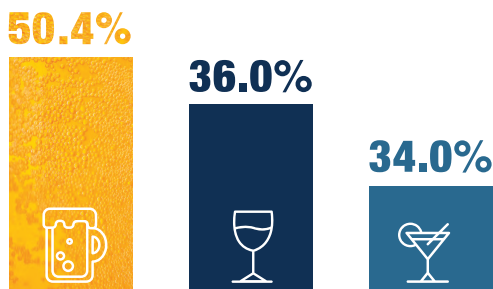
Household Penetration 2018



Trip Frequency 2018

REPEAT BUYERS

Beer drives higher repeat buyers than wine & spirits



BASKET RINGS

Beer delivers a high value basket ring



SATISFACTION

More consumers satisfy their bev al needs with beer

92.2%



35.8%



36.2%



BUYER CONVERSION

Beer has higher conversion compared to wine and spirits

21.0%



4.2%



3.7%



BEER BRIEF



Beer has higher loyalty across channels than wine & spirits



Beer has among the highest \$ growth trends in all CPG



Beer reaches the highest number of consumers and drives the most trips



Beer drives strong basket rings

OUR ASK:

MORE MERCHANDISING OPPORTUNITIES

MORE PROMOTIONAL FREQUENCY

MORE ADS

MORE DISPLAYS

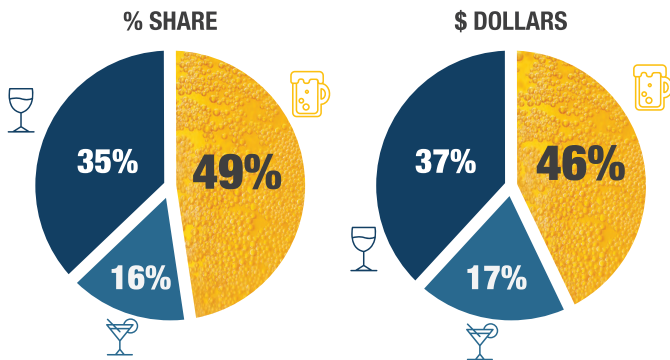
MORE SPACE

WHY BEER

Off-Premise / Mass

BEER IS #1

Beer is the largest alcohol beverage category



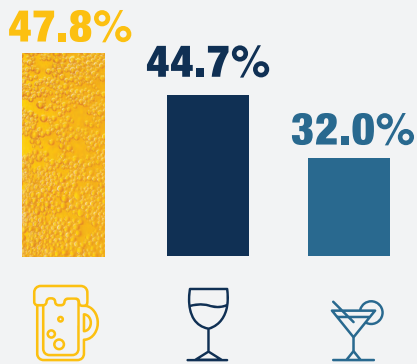
AND GROWING

Beer \$ sales trend ('000)

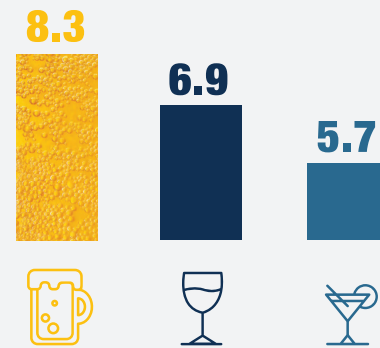


MORE SHOPPERS, MORE OFTEN

Beer reaches the highest number of consumers and drives the most trips



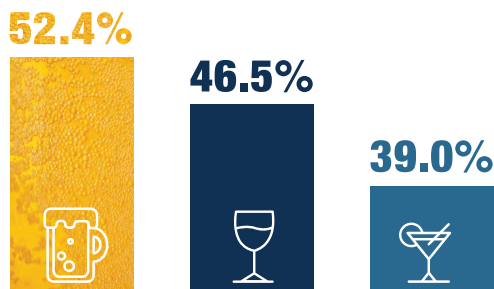
Household Penetration 2018



Trip Frequency 2018

REPEAT BUYERS

Beer drives higher repeat buyers than wine & spirits



BASKET RINGS

Beer delivers a high value basket ring



SATISFACTION

More consumers satisfy their bev al needs with beer

68.4%



48.1%



47.0%



BUYER CONVERSION

Beer has higher conversion compared to wine and spirits

34.6%



30.8%



15.6%



BEER BRIEF



Beer has higher loyalty across channels than wine & spirits



Beer has among the highest \$ growth trends in all CPG



Beer reaches the highest number of consumers and drives the most trips



Beer drives strong basket rings

OUR ASK:

MORE MERCHANDISING OPPORTUNITIES

MORE PROMOTIONAL FREQUENCY

MORE ADS

MORE DISPLAYS

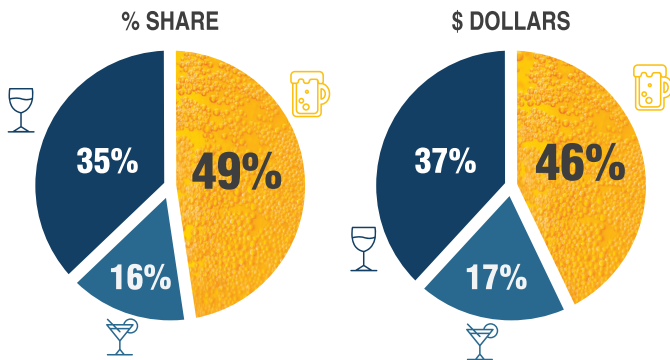
MORE SPACE

WHY BEER

Off-Premise / Grocery

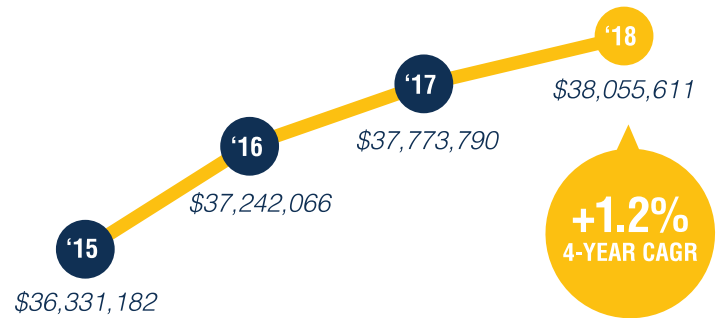
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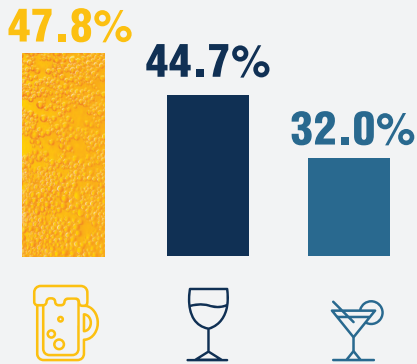
AND GROWING

Beer \$ sales trend ('000)

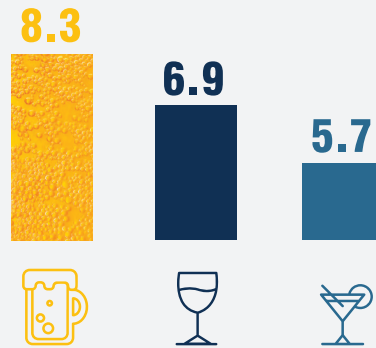


MORE SHOPPERS, MORE OFTEN

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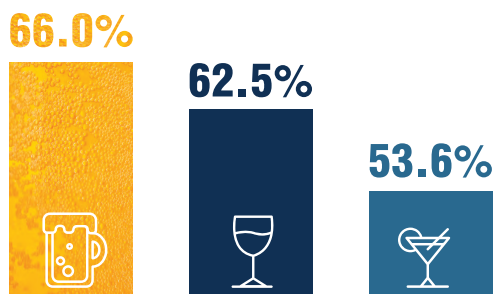
Household Penetration 2018



Trip Frequency 2018

REPEAT BUYERS

Beer drives higher repeat buyers than wine & spirits



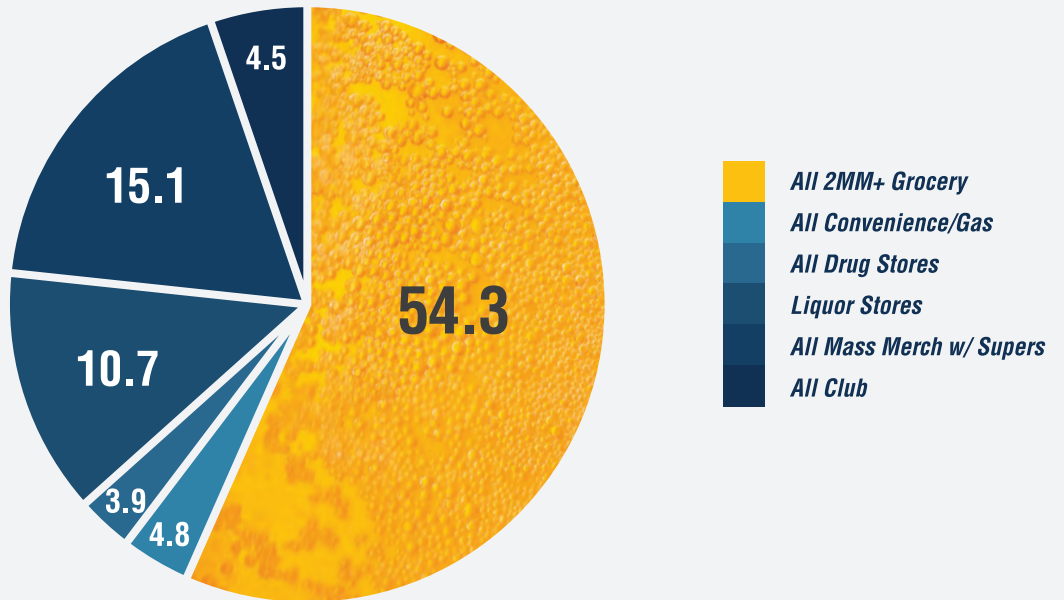
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SHARE OF WALLET

BEER BRIEF



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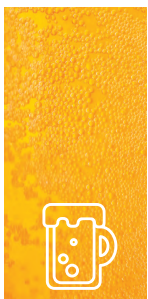


Beer drives strong basket rings

SATISFACTION

More consumers satisfy their bev al needs with beer

51.8%



46.6%



37.5%



OUR ASK:

MORE MERCHANDISING OPPORTUNITIES

MORE PROMOTIONAL FREQUENCY

MORE ADS

MORE DISPLAYS

MORE SPACE

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Source: Nielsen Homescan Premium