BEER’S #1
Beer is the largest alcohol beverage category

%CONSUMPTION

<table>
<thead>
<tr>
<th>16%</th>
<th>17%</th>
</tr>
</thead>
<tbody>
<tr>
<td>37%</td>
<td>47%</td>
</tr>
</tbody>
</table>

%DOLLARS

<table>
<thead>
<tr>
<th>16%</th>
<th>17%</th>
</tr>
</thead>
<tbody>
<tr>
<td>38%</td>
<td>45%</td>
</tr>
</tbody>
</table>

AND GROWING
Beer $ Sales Trend (’000)

<table>
<thead>
<tr>
<th>Year</th>
<th>Value (’000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>’15</td>
<td>$36,331,182</td>
</tr>
<tr>
<td>’16</td>
<td>$37,327,494</td>
</tr>
<tr>
<td>’17</td>
<td>$37,791,605</td>
</tr>
<tr>
<td>’18</td>
<td>$38,131,900</td>
</tr>
<tr>
<td>’19</td>
<td>$39,347,616</td>
</tr>
</tbody>
</table>

5-YEAR CAGR: +1.6%

MORE SHOPPERS, MORE OFTEN
Beer reaches the highest number of consumers and drives the most trips

Household Penetration 2019

- 15.8%
- 12.4%
- 4.9%

Beer Buyers Trip Frequency on the Rise

- 4.2
- 3.3
- 2.9

6.4% % YOY Change for Beer

Beer Drives the Most Trips

REPEAT BUYERS
Beer drives higher repeat buyers than wine & spirits

- 52.0%
- 45.9%
- 39.2%

BASKET RINGS
Beer delivers a high value basket ring

Without Beer: $55.29
With Beer: $87.69

**SATISFACTION**

More consumers satisfy their bev al needs with beer

- Beer: 68.5%
- Wine: 49.3%
- Spirits: 44.6%

**BUYER CONVERSION**

Beer has higher conversion compared to wine & spirits

- Beer: 35.5%
- Wine: 30.2%
- Spirits: 16.1%

**DISPLAYS WITH FEATURES GENERATE HIGHER LIFT**

Features increase lift for beer on display

- Without Feature: 4%
- With Feature: 29%

Displays with features generate 7.1 times more lift

**BEER BRIEF**

- Beer on display with feature generates high lift
- Beer shoppers spend more $ on beer
- Beer reaches the highest number of consumers
- Beer drives the most trips

**OUR ASK:**

- **MORE:**
  - MERCHANDISING OPPORTUNITIES
  - PROMOTIONAL FREQUENCY
  - ADS
  - DISPLAYS WITH FEATURES
  - SPACE

Sources: Nielsen Homescan Premium, Nielsen RMS xAOC+Conv+Liquor W/E 11/30/2019 +YA, 2YA, 3YA, Beer Marketer’s Insights Beer Industry Update

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.