

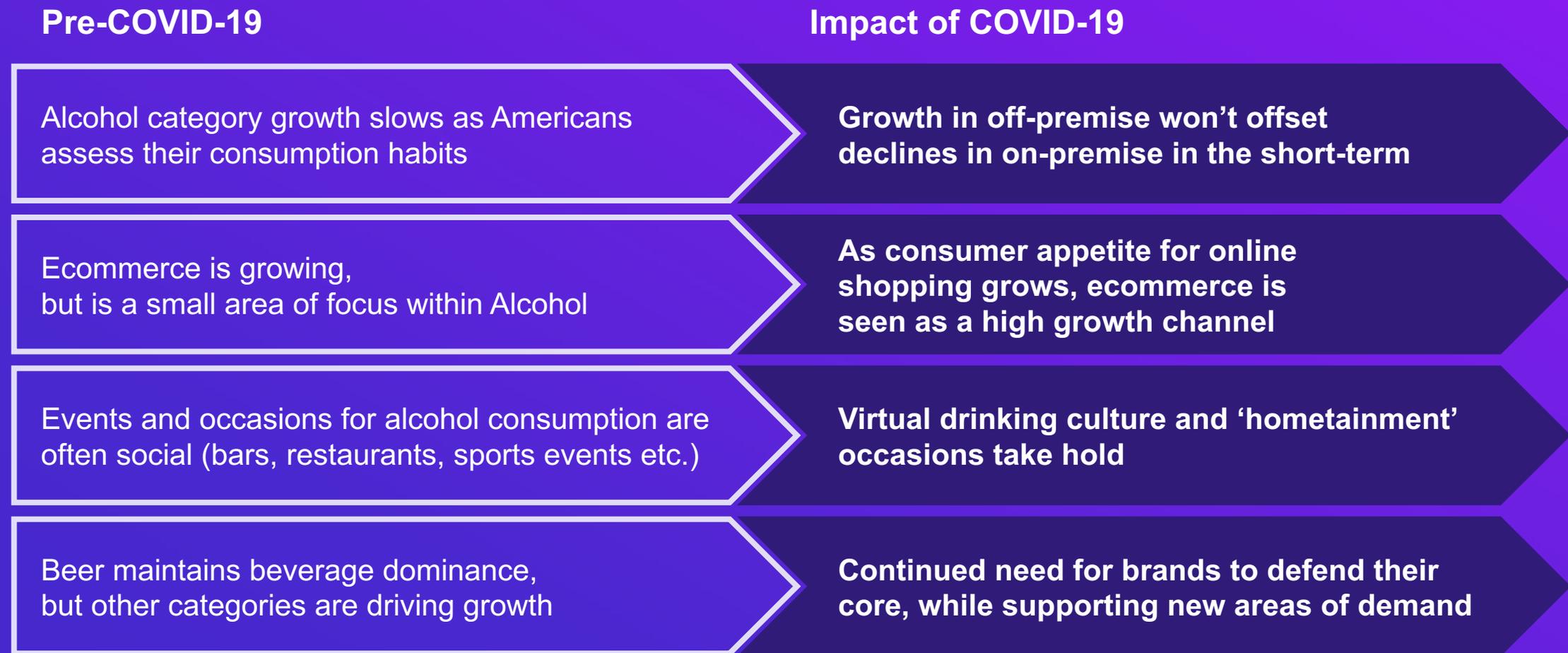


NBCUniversal

Alcohol Category Assessment

Acceleration due to 2020:

Bringing Home Consumption



As Consumers Widen Their Beverage Repertoire, New Areas of Demand Have Emerged



Hard Seltzers

Nolo Alcohol

Premium

Imports

Advertisers are looking for ways to capture growing demand across alcohol sub-categories, while also distinguishing their brands from competitors

ALCOHOL CATEGORY

Impact of COVID-19

Across Alcohol Sub-Categories

	Beer	Wine	Spirits	Hard Seltzer	Nolo Alcohol
COVID-19 Impact	<ul style="list-style-type: none"> Off-premise sales spikes for sub-premium brands, core brands, and imports Depending on sales channel mix, brands saw mixed results due to consumer shifts to at-home consumption Consumers are trading up to larger pack sizes 	<ul style="list-style-type: none"> Off-premise sales of wine initially outpaced beer during the crisis Ecommerce sales have grown throughout stay-at-home orders Larger pack sized products such as boxed wine have seen growth during the crisis 	<ul style="list-style-type: none"> Off-premise sales of spirits outpaced beer and wine during the crisis, especially those of RTD cocktails Ecommerce sales have soared throughout stay-at-home orders 	<ul style="list-style-type: none"> Hard seltzers have continued to see explosive growth throughout the crisis, especially going into the summer months 	<ul style="list-style-type: none"> Growing interest in healthy or better-for-you behaviors driving growing interest in nolo alcohol options, especially among younger consumers
Post COVID-19 Considerations	<ul style="list-style-type: none"> Importance of brand-building to battle price sensitivity and switching behavior Leveraging data as a way to target strategic audiences that are most likely to convert (i.e., heavy category buyers, brand loyalists) 	<ul style="list-style-type: none"> Opportunity to help brands get closer to consumers by facilitating 'drive-to' experiences, especially as wine subscription options grow 	<ul style="list-style-type: none"> Leveraging data as a way to target strategic audiences (heavy category buyers, premium enthusiasts etc.) Aligning with new or reimagined at-home entertainment moments that align with spirits consumption 	<ul style="list-style-type: none"> Cultural moments and sponsorships as a way to launch products, drive consideration and differentiate Opportunity to reach younger legal-age audiences via digital and mobile activations 	<ul style="list-style-type: none"> Importance of mass reach as a vehicle for driving awareness and consideration Potential for increased category growth driven by health-conscious consumers Messaging and content alignment considerations as brands look to establish authority in this growing category

Alcohol Category

What We Are Seeing and Hearing



Tapping into New Occasions

Brands are looking to inject themselves into new or reimagined occasions as consumers embrace new routines (virtual happy hours, meal moments, reimagined sports events etc.).



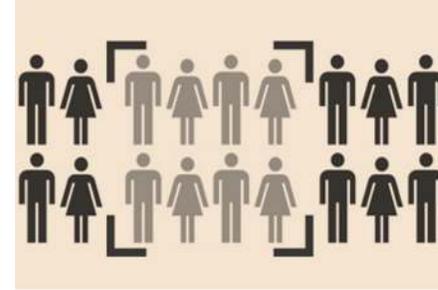
Getting Closer to Point of Purchase

Brands are looking for ways to get closer to consumers' point of purchase ('click-to' content capabilities, shoppable moments).



Lean-In Storytelling

Brands are increasingly looking for storytelling opportunities that command attention via talent, interactive creative, commercial innovation, gamification etc.



Exploring High Value Audiences

Brands are exploring high value audiences beyond traditional sports buys, expanding into more diverse content plays, leaning into multicultural messaging, and investing in data targeting capabilities.



Following Viewer Consumption

Brands are looking to capitalize on evolved consumption patterns and modernize their video approach to include all screens and devices.

NBCU One Platform Content Can Deliver Alcohol Audiences at Scale

Multicultural

58M REACH

Online Shoppers

158M REACH

Hispanics

26M REACH

Sober-Curious Consumers

71M REACH

Heavy Beer Buyers

70M REACH

Sports Fans

16M REACH

Health Enthusiasts

164M REACH

Gamers

45M REACH

Millennials

31M REACH

Streamers

80M REACH

Premium Liquor Buyers

70M REACH

Music Lovers

45M REACH

Alcohol Playbook

Example Strategies for How Brands Can Partner with NBCU Across One Platform

Alcohol Objectives

NBCU Solutions

Support New Areas of Demand

Generate broad reach and drive brand/product awareness

Awareness

Leverage a total video approach to engage audiences across screens in brand safe content

Engage Younger LDAs

Drive key KPIs with younger audiences at scale

Consideration

Engage strategic audiences via One Platform Digital and advanced targeting powered by AdSmart

Tap into Occasion Based Moments

Seamlessly integrate into new or reimagined routines and cultural moments

Purchase Decision

Drive relevancy and perception via sponsorships, integrations, commercial innovation, or commerce solutions

Whitespace Ownership

Breakthrough the clutter and tap into a re-set mindset during Q1

Brand Equity

Identify key storytelling moments via cultural moments, sponsorships, custom content etc. in an untapped time period



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THANK YOU!