Lets cast our mind back to pre covid world if we can remember what that was like

The only bubbles I wanted was in my beer or prosecco

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But then COVID hit and the world changed

STAY HOME
PROTECT THE NHS
SAVE LIVES

Ecom Share

2019	2020	2021
7.6%	11.2%	11.8%
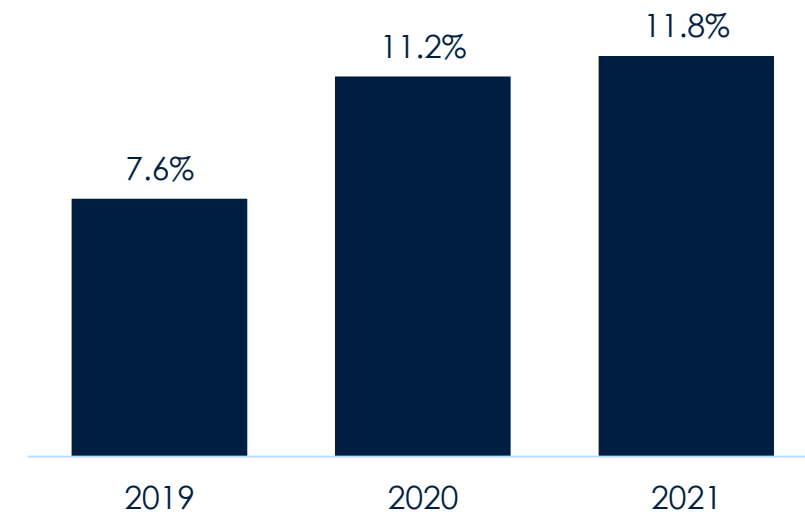
And that changed in beer & cider too

Pubs shut as people were told to stay at home
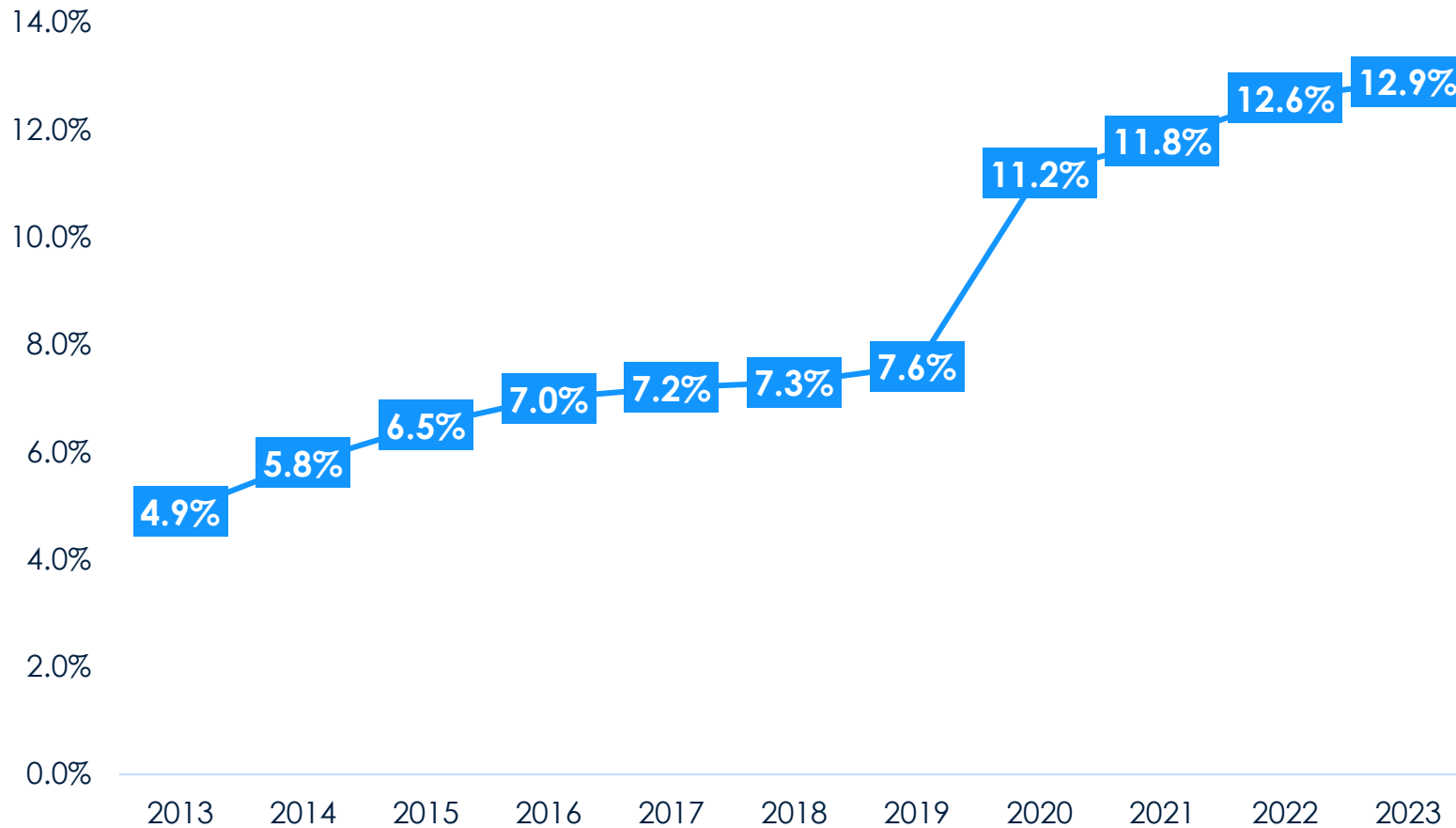

41% of on trade occasions moved in home

Shoppers queued for a online delivery slot

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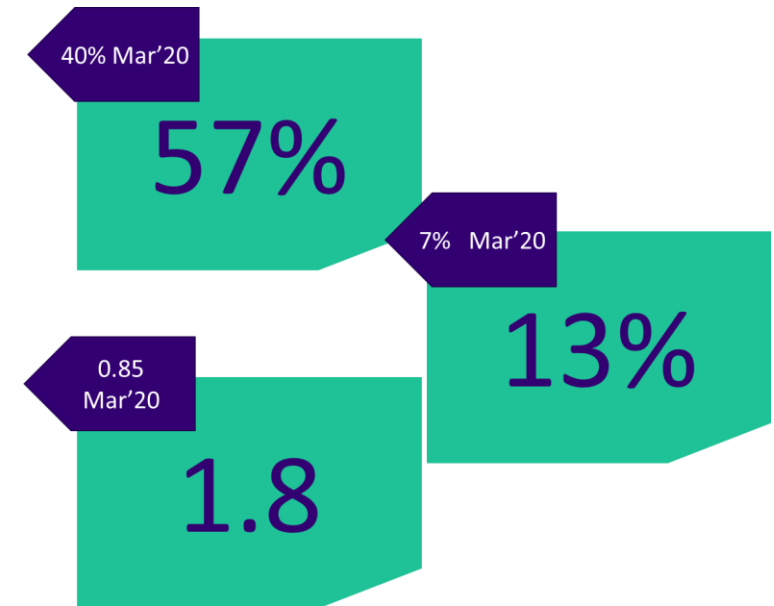Source, Kantar, Beer & Cider, Ecom Share Data to January 2021

Context & Background

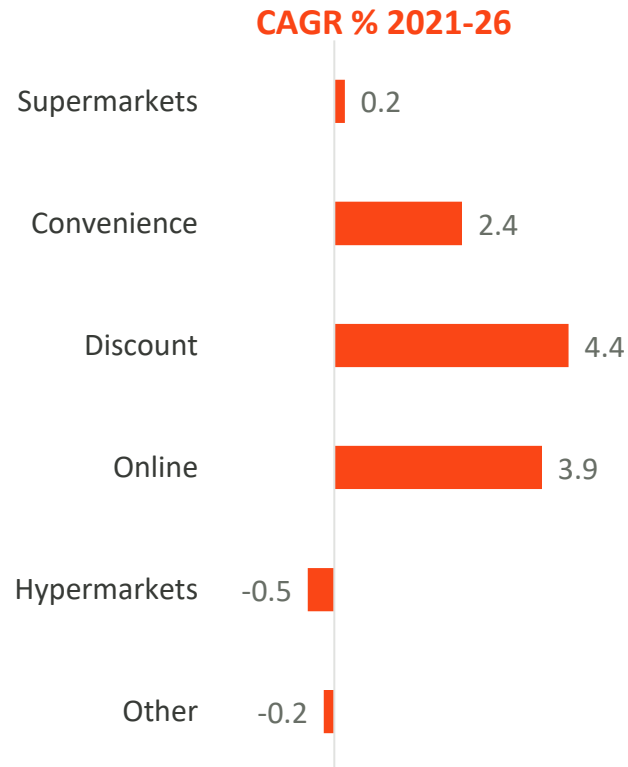# Online sales literally sky rocketed as consumers moved into the online space & away from bricks and mortar stores

Online Grocery Sales

Year	Value
2013	4.9%
2014	5.8%
2015	6.5%
2016	7.0%
2017	7.2%
2018	7.3%
2019	7.6%
2020	11.2%
2021	11.8%
2022	12.6%
2023	12.9%

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Source, Kantar, FMCG Panel, Ecom Share Data to January 2021

Context & background within the online

CAGR % 2021-26

Channel	CAGR %
Supermarkets	0.2
Convenience	2.4
Discount	4.4
Online	3.9
Hypermarkets	-0.5
Other	-0.2

Shopper profile by AGE

Age	All online shoppers	New online shoppers
18-24	12%	11%
25-34	20%	20%
35-44	18%	10%
45-54	18%	11%
55-64	13%	16%
65+	20%	32%

40% Mar'20 — **57%**

7% Mar'20 — **13%**

0.85 Mar'20 — **1.8**

Online is forecast to be one of the fastest growing channels to 2026. As Covid has fundamentally changed the UK grocery market

Newer online shoppers are more affluent and older in comparison to the traditional online shopper

Since COVID-19 restrictions came into place in March 2020, online usage has surged to record levels.

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Beer & cider under trades vs total grocery share driven by ranging opportunities and basket participation

Grocery Online vs Beer & Cider Share

11.8%

8.9%

£168M
Category Opportunity of getting fair share

Online Grocery Share

Online Beer & Cider Share

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IRI & Kantar E-commerce, Beer & Cider, Data to August 2021

So what were we facing into

So we developed a strategy: Introducing R.E.S.T

Make It Relevant

Correct pack formats across pure play, traditional online & final mile operators. Having a tailored solution across all three channel touchpoints is key, XL packs in pure play, large packs for bricks & clicks , and smaller pack for final mile operators

Make It Easy

Making it faster for shoppers to find the products they want is proven to increase spending across total category, therefore ensuring web & app platform are optimised

Make It Tech Simple

Making it easy for shoppes to find the products which they want, which encourages them to come back again & buy again

Make It Speedy

Making it simple for shoppers for to shop the pages, it should only take 6 clicks to put a product into your virtual basket any more than this and we have lost the shopper

R.E.S.T.

Make it **R**elevant
Make it **E**asy
Make it **S**peedy
Make it **T**ech Simple

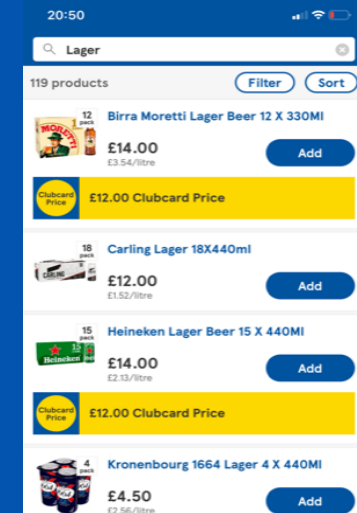MOLSON COORS beverage company

How does R.E.S.T. play out within the marketplace

Make it Relevant

Make it Easy

How does R.E.S.T. play out within the marketplace

Make it Tech Simple

Make it Speedy

On promotion   Wine & Champagne
Meat & Poultry   Beer
Fish & Seafood   Lager
Fruit & Veg   Ale
Fresh   Craft
Bakery & Cakes   Cider
Food Cupboard   Hard Seltzer
Frozen   Spirits & Liqueurs
Drinks   Gluten Free
Beer, Wines & Spirits   Gifts
Household   Barware

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The online strategy builds on our overall Molson Coors category strategy

ENERGISE	PREMIUMISE	INSPIRE
ENSURE HEALTHY BEER & CIDER SALES BY EXCITING CONSUMERS ABOUT THEIR FAVOURITE TRUSTED BRAND	**CONVERT EXISTING CONSUMERS INTO MORE PREMIUM AREAS OF LAGER, ALES AND CIDER**	**CREATE MORE INTEREST IN BEER AND CIDER BY HELPING CONSUMERS EXPLORE DIFFERENT PRODUCTS AND FLAVOURS**
ENERGISE CATEGORY OPPORTUNITY **£126M**	PREMIUMISE CATEGORY OPPORTUNITY **£86M**	INSPIRE CATEGORY OPPORTUNITY **£16M**

MAKE IT A GREAT EXPERIENCE

OFFER CONSUMERS AN ENJOYABLE EXPERIENCE THAT GIVES THEM A REASON TO VISIT AND KEEP COMING BACK

WE BELIEVE BALANCING THESE FOCUS AREAS
IS THE KEY TO DELIVERING SUSTAINABLE GROWTH

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What falls into each segment

Energise

Premiumise

Inspire

So what we did

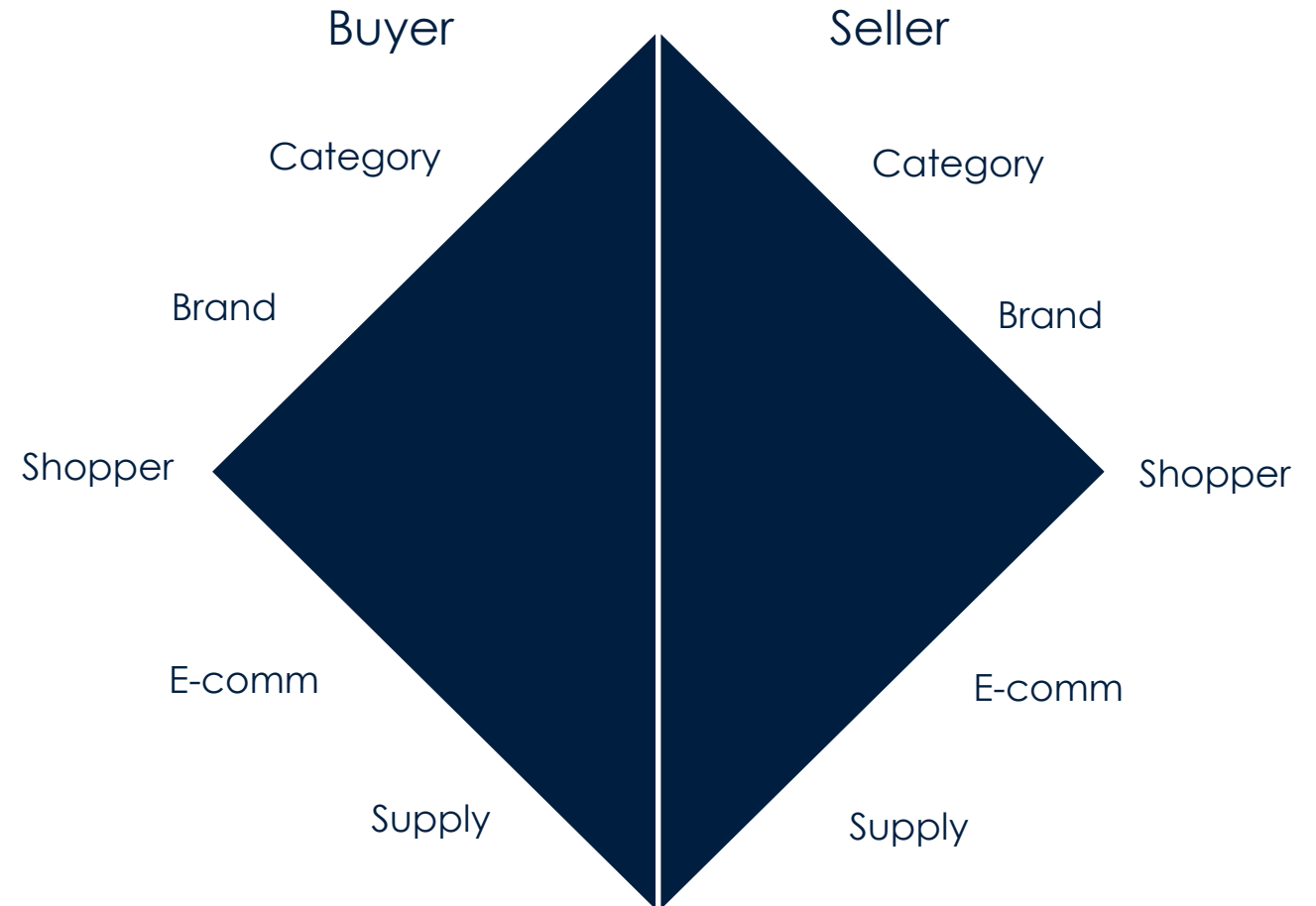| Engaged with our partners	Worked with our retail partners	Developed pack strategies to meet the shoppers need

But also it required a change of approach and moving out of the traditional buying team and moving towards a diamond relationship

Buyer   Seller

Category

Brand

Shopper

E-comm

Supply

Category

Brand

Shopper

E-comm

Supply

Buyer   Seller

Category

Brand

Shopper

E-comm

Supply

Category

Brand

Shopper

E-comm

Supply

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What we achieved

Share Gains

- Share up +1% point YoY
- Increased brand presence across the market

Enhanced Relationship

- Unlocking new contacts across the trade
- Building relationships with 3rd party brands to bring total solutions

Increased distribution in emerging channels

- Growth of premium and core brands across both quick commerce and also pure play retailers

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But there continues to be more we can do in this space to unlock the category growth opportunity within E-com

Online forecast to be one of the fastest growing channels

Continued penetration growth opportunity

Longer term frequency growth

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