

# How Budweiser Brewing Group is leveraging agile technology and services to get fast, quality insights



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Quirks London – 3<sup>rd</sup> May 2023

# With you today



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Category Manager



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Management Head



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Enterprise Account  
Director





*Budweiser*<sup>®</sup>  
BREWING GROUP UK&I

**19.6%** of Beer Category

**30%** Brand Power **KANTAR**





**Big & Premiumizing**



**Inclusive & Resilient**



**Natural & Local**



# From Category Leaders to Leading Category Growth



Current

Future

# From Category Leaders to Leading Category Growth



COVID  
Surplus



Customer &  
Consumer  
centricity



Prioritize  
investment

Unlock the Triple Win



Customer



Consumer



BBG



## Category Management Mission

**Lead & Shape** strategy  
with **Consumer &  
Customer centricity** at the  
core, bringing our world-  
class brands to life in-trade  
and **Digitally Transforming**  
our ecosystem, all to  
unlock **Profitable Growth**

# Thought Leaders



WELCOME TO THE UK, TRADITIONALLY KNOWN AS:

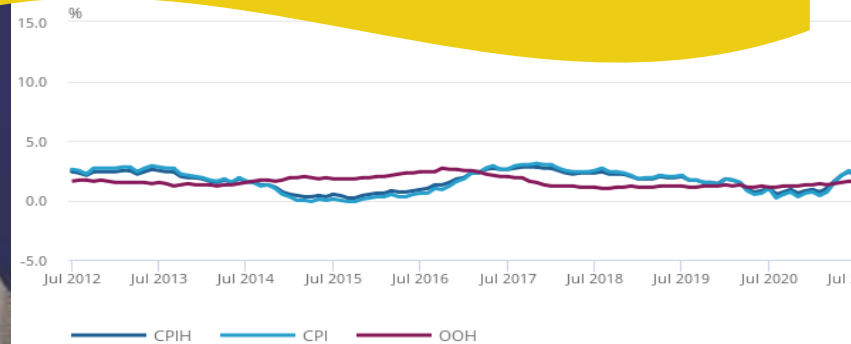
Mature Market with reliable supply chains

A beacon of parliamentary democracy



KEEP  
CALM  
AND  
CARRY  
ON

A low inflation & low interest rate G7 economy with a strong currency

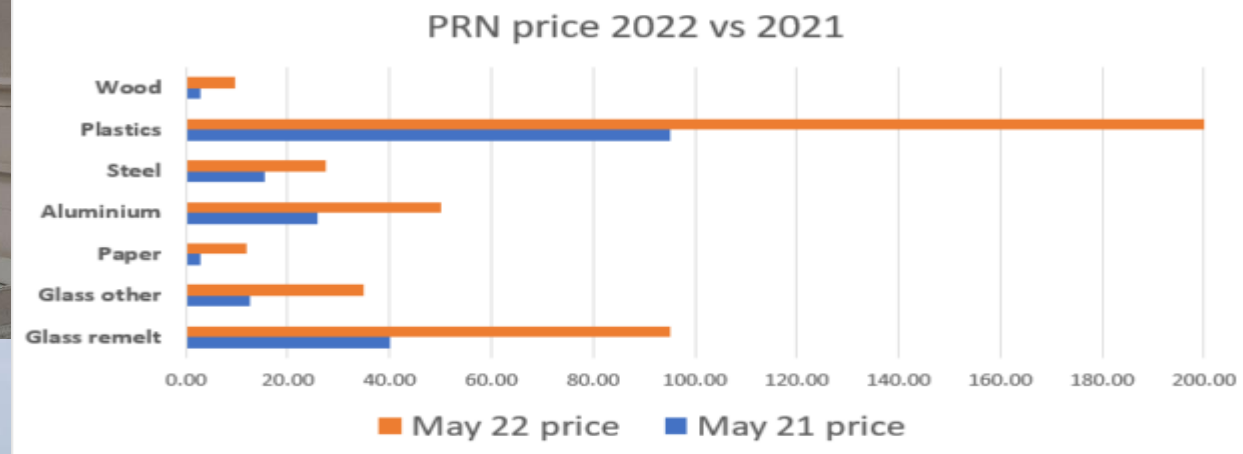




UNTIL ....



# Bank of England expects UK to fall into longest ever recession



## UK INFLATION IS AT ITS HIGHEST LEVEL FOR DECADES

PRICES ROSE BY 10.1% IN THE YEAR TO JULY 2022



Source: ONS CPI



### UK truck driver shortage signals a broken labour market

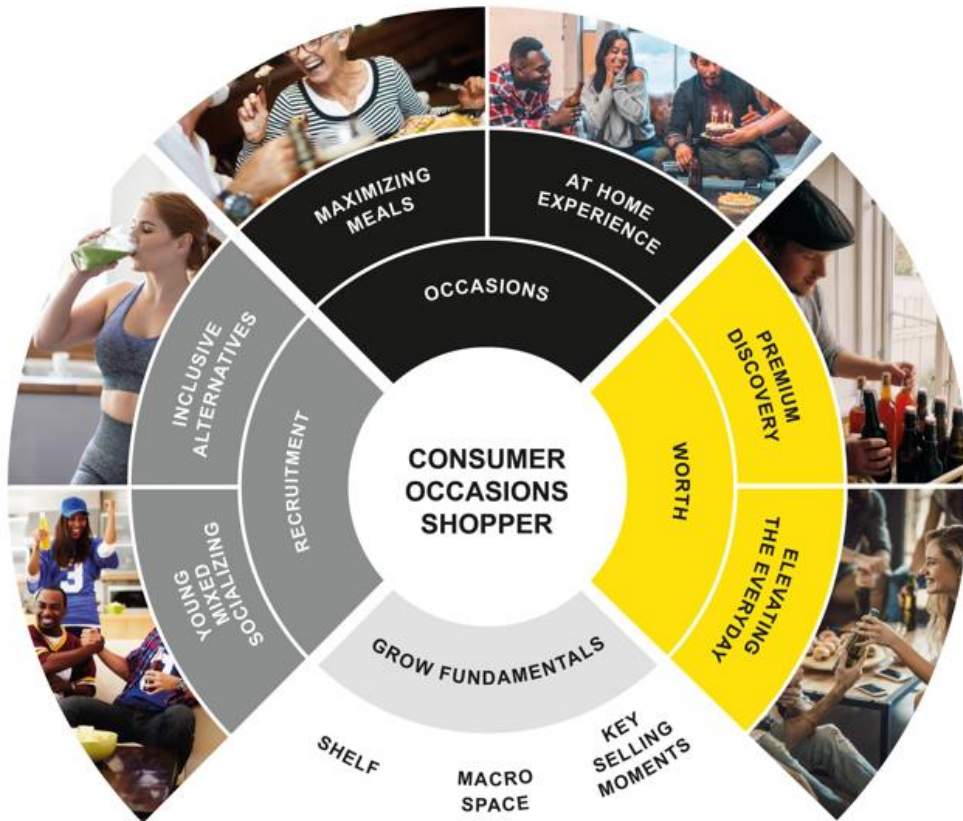
Empty shelves in supermarkets are a message from a workforce that is usually invisible



20



# Where to play? Category Vision



**G**  
**R**  
**O**  
**W**

**2023** PRESENT PLENTY OF OPPORTUNITIES TO

Recruit New Consumers In & Beyond Beer

£117m - Size of the opportunity  
Almost only 1/3 of Young Adults consume beer IH

Expand IH Consumer Occasions

£213m - Size of the opportunity  
60% of consumers argue they will be transferring 00H occasion IH in 2023

Trade-up Consumers and Enhance Premium Discovery

£198m - Size of the opportunity  
+7.3pp P/SP share vs 2018 and expected to grow extra +8.3pp until 2030

# How to Win?



**Quantitative  
Data**

An abstract digital background featuring glowing blue and orange lines, data points, and a grid pattern, suggesting a high-tech or data-driven environment.

**Strategy**

A hand-drawn strategy diagram on a chalkboard. It features three circles arranged in a triangle, connected by curved arrows in a clockwise cycle. A central 'X' is drawn, and a dashed line extends from the bottom circle towards the left. A hand is visible at the bottom left, holding a piece of chalk.

**Consumer  
Behaviour**

A man in a maroon t-shirt is standing in a grocery store aisle, examining two bottles of beverages. The background shows shelves stocked with various products.

# Key considerations for Budweiser Brewing Group when selecting an agile partner

- ✓ **Quality:** robustness of samples and methodologies
- ✓ **Platform UX:** user-friendly, speed to results
- ✓ **Service:** insights proactivity & customer support
- ✓ **Value:** Cost efficiency & customer added value

# FRAMING THE CONVERSATION ON BEER IN 2023 WITH CONSUMER INSIGHTS

THE OPPORTUNITY IN BEER



THE IMMEDIATE CHALLENGE: COST OF LIVING



GROWING SHARE OF BWS



CLEAR MACRO TRENDS



DEMOGRAPHIC FAIR SHARE

21.7%

OF BEER SHOPPERS ARE 'STRUGGLING' IN THEIR CURRENT ECONOMIC STATE (+1.4ppts vs. July 22)

64.6%

OF ALCOHOL SHOPPERS WERE MORE FOCUSED ON FINDING GOOD DEALS/PROMOTIONS THIS CHRISTMAS

LONGER TERM CONSIDERATIONS



DEPOSIT RETURN SCHEME



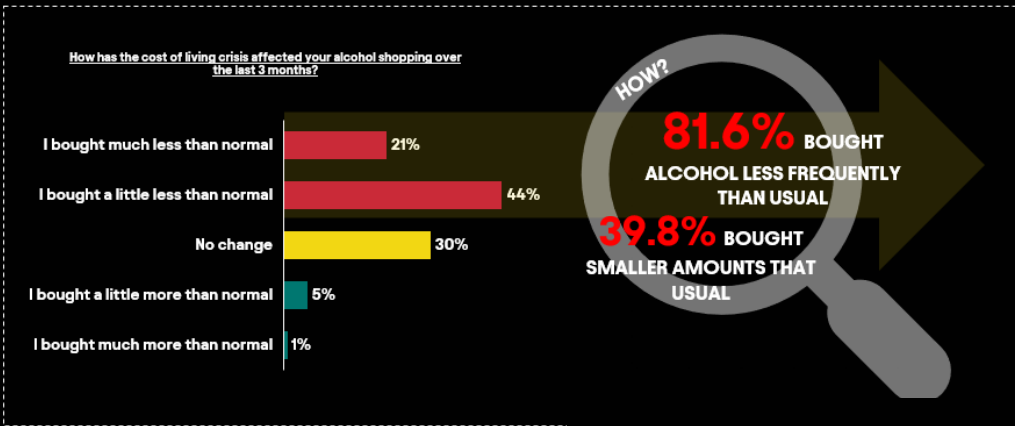
MINIMUM UNIT PRICING



ABV. DUTY CHANGES

# USING CONSUMER INSIGHTS TO UNDERSTAND THE EVOLVING IMPACT OF COST OF LIVING ON THE BEER CATEGORY

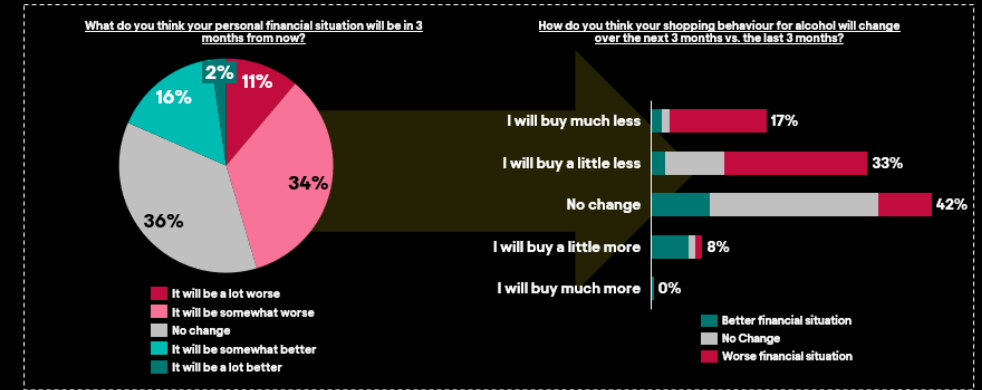
**65% OF ALCOHOL SHOPPERS TOLD US THEY BOUGHT LESS ALCOHOL THAN USUAL (OVER THE LATEST 3 MONTHS) DUE TO COST OF LIVING**



ABInBev Source: Toluna | Total Respondents: 520 Alcohol Shoppers | Apr 15, 2023

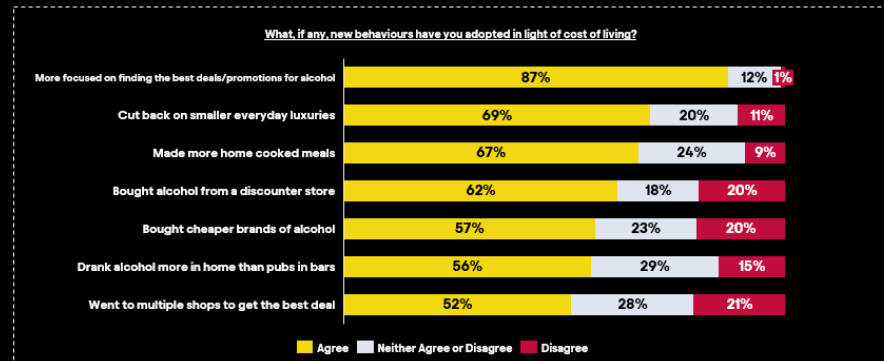
**LOOKING FORWARD TO THE NEXT 3 MONTHS, 45% OF ALCOHOL SHOPPERS EXPECT THEIR FINANCIAL SITUATION TO WORSEN**

WITH SHOPPER CONFIDENCE LOW HEADING INTO SPRING/SUMMER, 50% OF SHOPPERS EXPECT TO BUY LESS



520 Alcohol Shoppers | Apr 15, 2023

**ALCOHOL SHOPPERS HAVE BEEN MAKING CUTS ACROSS THE EVERYDAY AND SEEKING THE BEST VALUE FOR MONEY HAS REMAINED A KEY PRIORITY**



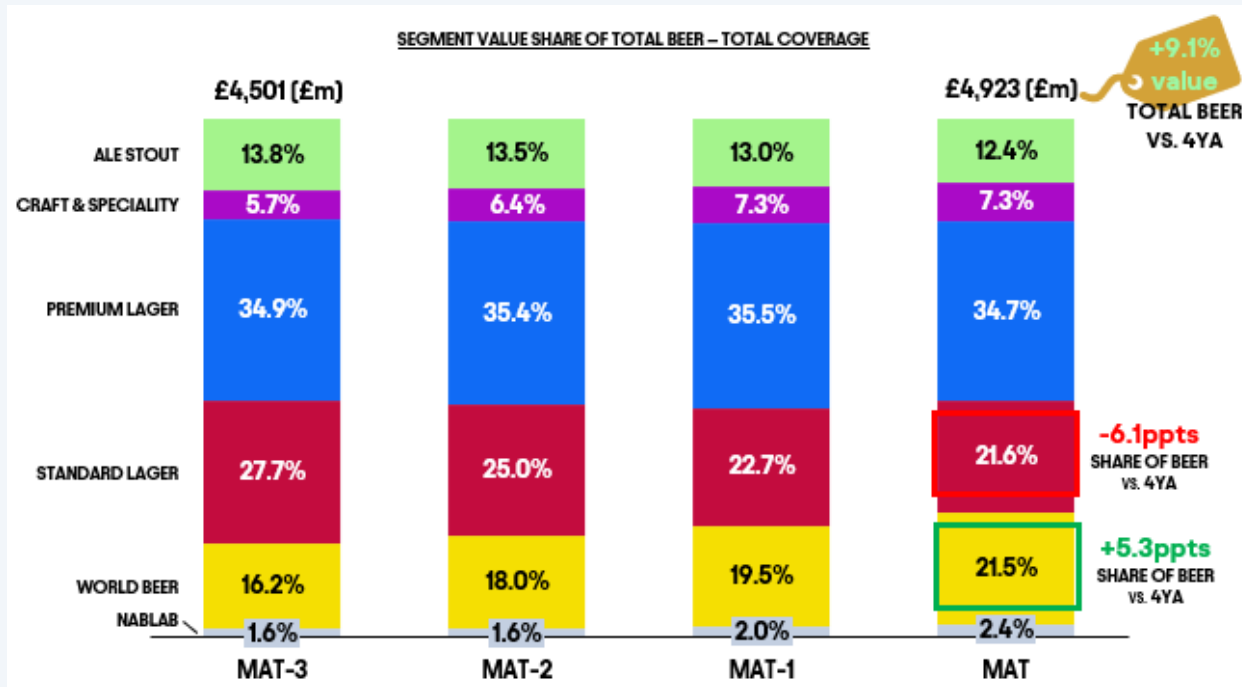
ABInBev Source: Toluna | Total Respondents: 520 Alcohol Shoppers | Apr 15, 2023

**1. UNDERSTANDING HOW CONSUMERS HAVE BEHAVED AND WHY... LAYER UPON OUR OTHER DATA INSIGHTS**

**2. UNDERSTANDING CURRENT & FUTURE CONSUMER SENTIMENT TO SEE HOW THIS MAY IMPACT FUTURE TRENDS**



# LOOKING FORWARD: UNDERSTANDING THE IMPLICATIONS OF UPCOMING PRICE EVOLUTION WITHIN THE BEER CATEGORY



1. WHAT IS THE IMPORTANCE OF DIFFERENT FACTORS ON SHOPPING BEHAVIOUR: PRICE VS. BRAND/FLAVOUR
2. HOW IS THIS EVOLVING IN LIGHT OF COL?
3. HOW COULD THESE DECISION MAKING FACTORS IMPACT THE PREMIUMIZATION CATEGORY TREND?
4. UTILISING TOLUNA QUAL SOLUTIONS TO UNDERSTAND THE IMPACT

LONGER TERM CONSIDERATIONS

- DEPOSIT RETURN SCHEME
- MINIMUM UNIT PRICING
- ABV. DUTY CHANGES



121  
CONVERSATIONS  
WITH TARGET  
DEMOGRAPHIC



toluna\*startqual

Seamless and iterative use of Qual & Quant methods



Qual Quant

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*“Disconnected”*  
*“Slow” “Costly” “Hard”*  
*Frustrating”*

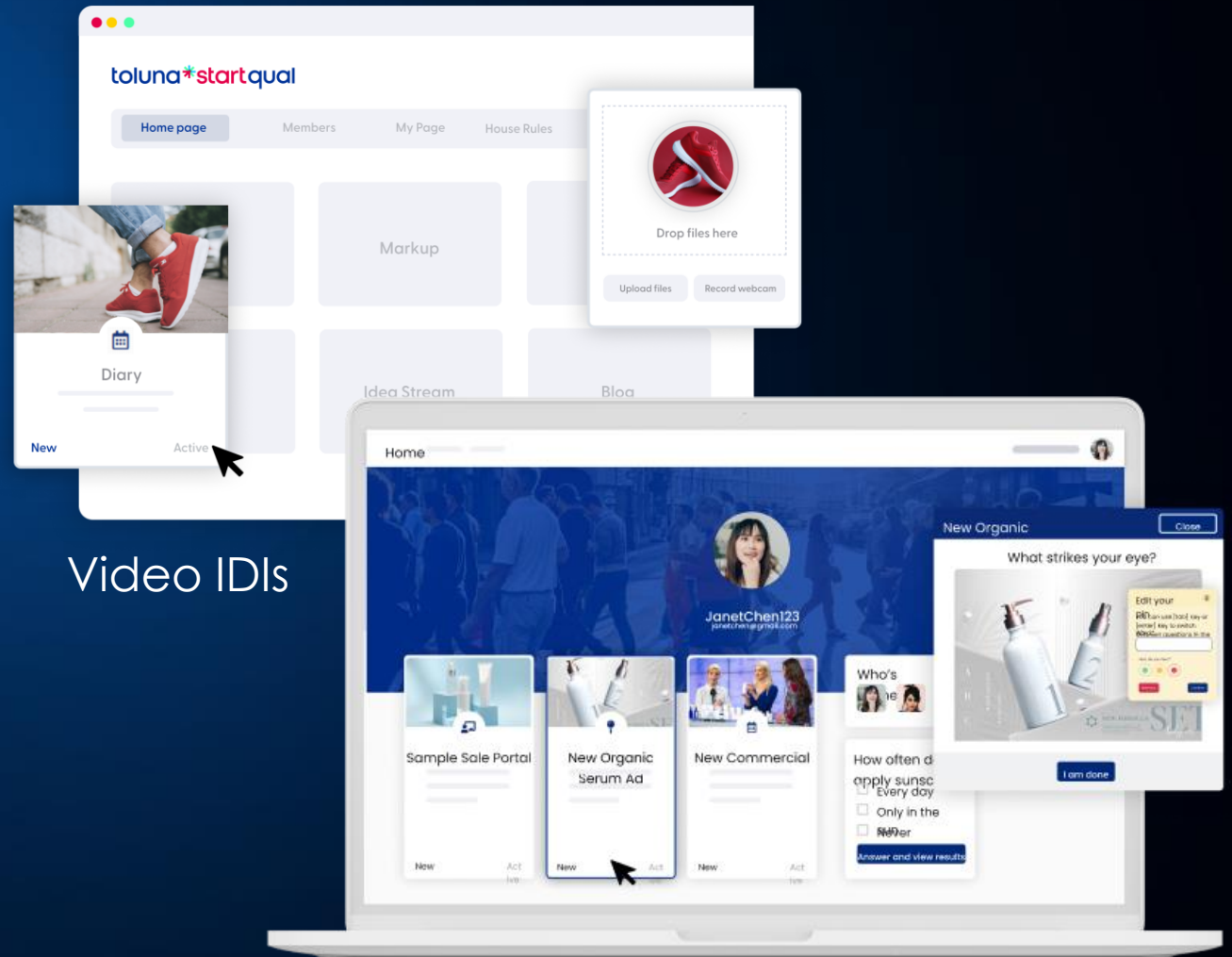
## Explore with Qual

- Live group chats & IDs
- Design thinking workshops
- Communities



## Validate with Quant

Large-scale survey



Video IDs

# Helping you to do more with less



## Do it yourself

Iterate on your own with our automated, best-in-class methodologies.



## Instant Insights

Get the insights and answers you need the moment you need them.



## Flexible Tech.

A hybrid model with the ability to shift your method at any moment, making it easy to flex your approach as your needs change.



## Reliable Results

Lead with confidence—through pre and post field work, to back up every decision you make.



## Full Service

Backed by decades of market research expertise, reach any data point you need in one single source.

**Stand  
#102**

**Meet our experts & the  
Budweiser Team on the stand**

**Innovation  
Sprints**

**Brand & Comms  
Tracking**

**Agile market  
understanding**