NielsenIQ Beverage Alcohol

Enhancing Wine Off Premise coverage, NielsenIQ Retail Sales, & DtC Shipments – All in One Place

Combined Report: NielsenIQ Off Premise Retail Sales & DtC Wine Shipments

Through the NielsenIQ Partner Network, *NielsenIQ* is collaborating with *Wines Vines Analytics* and *Sovos ShipCompliant* to provide a more comprehensive view of the U.S. off-premise wine category by enabling both separate and <u>combined</u> views of retail off premise sales AND Direct to Consumer (DtC) shipments. Never has this been as important given today's channel shifting and route to market dynamics.

Background

WINES VINES ANALYTICS Maintains the wine industry's most accurate databases, and provides data-driven analysis, insights and reports to help clients grow and manage their businesses.

SOVOS ShipCompliant Provides a full suite of cloud-based solutions to the beverage alcohol industry to ensure that all federal and state regulations for direct to consumer and three-tier distribution are met.

NielsenIQ Measures off premise retail sales to consumers across a broad set of key selling channels in the U.S.

How the collaboration works

1 DtC Shipments are produced using a proprietary model driven by millions of shipment transactions filtered through the Sovos ShipCompliant system. They are then organized and extrapolated to the Wines Vines Analytics database of over 11,000 wineries

2 NielsenIQ matches off premise retail data to the DtC shipment data at a variety of key product segment and geographic levels

NielsenIQ ✛ WINES VINES ANALYTICS ✛ SOVOS ShipCompliant

NielsenIQ + DtC Wine Shipments Features & Benefits:

Expands coverage
- Combines approximately $20 billion of NielsenIQ off premise reported wine retail sales with over $4 billion of reported DtC Shipment data (2021)
- Provides additional category coverage
- Provides more complete category growth rates, especially in premium price tiers

Reporting segments
Total Wine category and key segments:
- Price Tiers
- Domestic Origins
- Varietals
- Destination market (where sold and/or shipped to); each individual state
- DtC Shipments only - Winery segment size
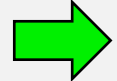
Reporting frequency/timeline
- High level category/segment reports delivered <u>monthly</u>
- Granular category/segment reports delivered <u>quarterly</u>,
- Up to 5 years of history

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REPORTING SEGMENTS

Origins
- California - Napa, Sonoma, Central Coast, Rem CA
- Washington
- Oregon
- Remaining U.S.

Winery Size (DtC only)
- Large (500,000 cases+)
- Medium (50,000-499,999 cases)
- Small (5,000-49,999 cases)
- Very Small (1,000-4,999 cases)
- Limited Production (<1,000 cases)

Facts
- Sales Dollars
- Sales Volume
- Average price (per 750 ml)

Periods
- PERIODS
- Monthly updated reporting
- Up to 5 years of history

Delivery
- Excel reports/Menu based reporting platform
- 3rd week following month end

Price Tiers (per 750ml equivalency)
- <$8
- $8-$10.99
- $11-$14.99
- $15-$19.99
- $20-$29.99
- $30-$49.99
- $50-$99.99
- $100+

Destination Markets
- Total U.S.
- Top markets (CA, FL, TX, NY, WA, OR, IL, PA) delivered monthly
- All states reported quarterly

Wine Types
- Reds - Cabernet Sauvignon, Pinot Noir, Blends, Zinfandel, Merlot, & more
- Whites – Chardonnay, Sauvignon Blanc, Blends, Riesling, P Grigio/Gris & more
- Rosé
- Sparkling

For more information, or more customized reports, contact Danny Brager at bragerdanny@gmail.com