# BEVERAGE ALCOHOL MEDIA REPORT

**Q2 2016**

**nielsen**

# WELCOME

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The digital landscape as an advertising channel continues to be of high importance in the Beverage Alcohol (Bev-Al) industry. With that mind, we included two new sections in the Bev-Al Media Report that provide a greater view into this space:

1. Generational Snapshot: This section provides a snapshot of media behaviors for Millennials, Generation X and Boomers across TV, online and mobile
2. Bev-Al Industry Media Spend: Using enhanced Digital spend coverage from the Nielsen Ad Intel tool, we provide a view of not only media spend across traditional channels, but also for digital broken out by platform.

Additionally, the section "Festival & Adult Beverages – A Winning Mix," was crafted in partnership with the Nielsen Entertainment Practice and illustrates how legal drinking age (LDA) festival goers are a market waiting to be tapped by music-savvy brands. These consumers are diverse, highly engaged with both music and the bev-al category and primed to be brand ambassadors.

As we have in past reports, we continue to highlight the top Bev-Al television ads and provide an updated look on how LDA consumers are engaging with media content that has a specific focus on generation and ethnicity.

We hope you find the information presented in this report helpful and insightful in gaining a better understanding of the ever-fragmenting advertising landscape.

SUSAN

# FESTIVALS & ADULT BEVERAGES – A WINNING MIX

The beat. The artists. The experience. Music festivals create an unparalleled atmosphere as fans gather, often for multiple days, to enjoy the ultimate music experience. Beyond their cultural impact, festivals offer a unique and valuable audience with boundless opportunities for Bev-Al brands to connect with consumers, activate their purchasing power and help drive the beat of the party.

LDA festival goers are diverse – they are 55% more likely to be Hispanic and 6% more likely to be Asian American. Males comprise 56% of this group. They also are city dwellers as they are 44% more likely to live within a large/major city. Nearly half of this group are Millennials, between the ages of 21 and 34. And these LDA Millennials crave music, especially live music: 63% of their $171 average music spend is on attending live events. 17% of their overall spend is specifically on festivals. Festivals are a prime opportunity to reach the coveted millennial audience in an environment where they are already drinking alcohol and conditioned to seeing brand integrations.

## THE FUTURE FOR MUSIC FESTIVALS LOOKS BRIGHT

Festival awareness is on the rise among LDA Americans, with the most growth in awareness seen by Coachella and iHeartRadio. Lollapalooza is the festival giant – over half of LDA Americans have heard of this festival, proving the scene is no longer "niche." And through festival activations you can leverage fans as your brand ambassadors. While at live events, they are active on social media sites like Facebook and Instagram. They are 23% more likely to share videos and 15% more likely to share photos on social media than the average music listener.

> **"**
>
> LDA FESTIVAL GOERS ARE DIVERSE – THEY ARE **55%** MORE LIKELY TO BE HISPANIC AND **6%** MORE LIKELY TO BE ASIAN-AMERICAN.
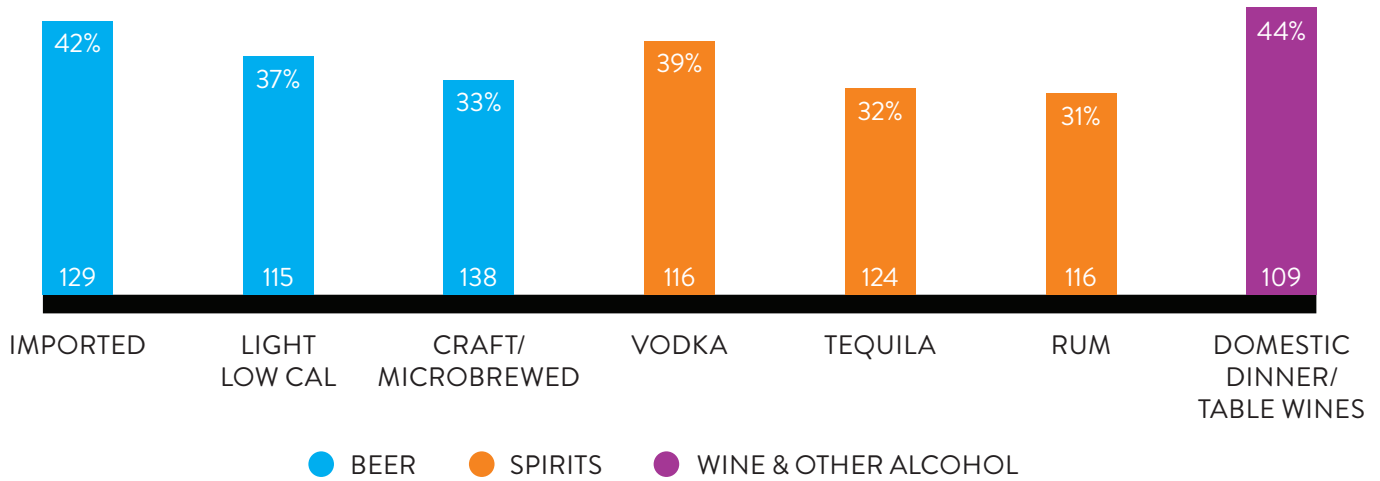>
> **"**

Perhaps most encouraging for the Bev-Al industry: Festival goers are 31% more likely than the average consumer to have consumed an adult beverage in the past 30 days. Domestic wine sits at the top of preferred categories, followed closely by imported beer with 44% and 42% penetration among festival fans. Both light low calorie beer and craft beer are much liked too, with over a third of festival fans drinking both.

In the spirits category, vodka, tequila, and rum are liked most. The latest Nielsen Entertainment report on the international live music market highlighted the marked difference in interest in alcohol among people who have attended live events in the past 12 months and those who have not. Alcohol interest is highest in the USA, with the U.K. and Germany the number two and number three spots. However, across every country, those who attend live music events show a much higher interest in many types of alcohol.
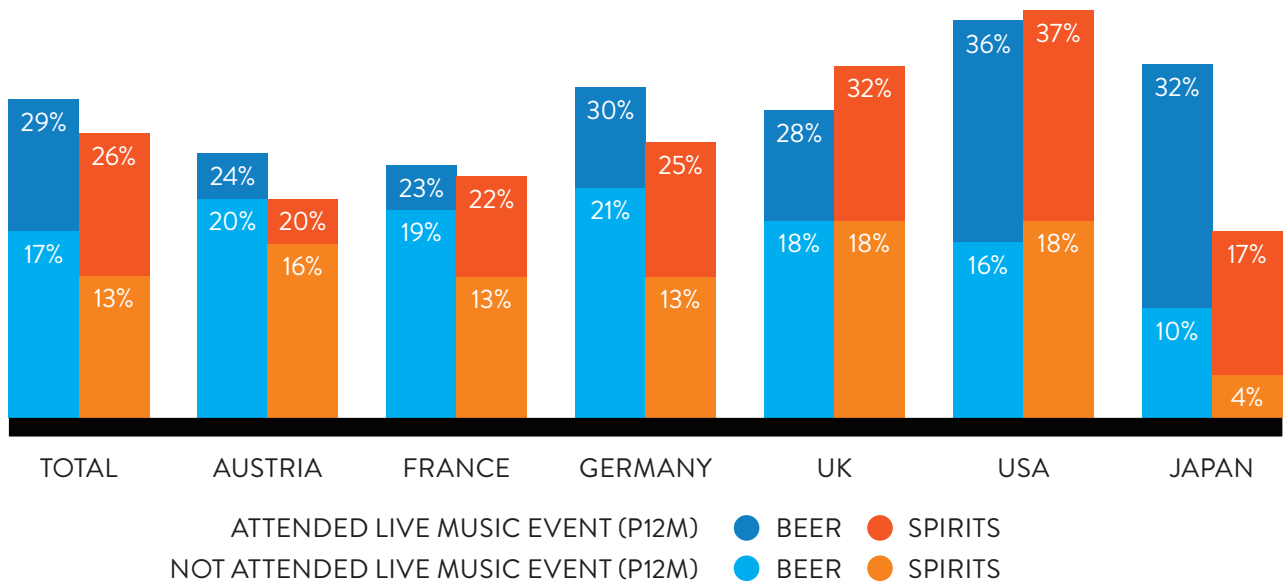
## ADULT BEVERAGES CONSUMED BY LDA FESTIVAL GOERS

| | | | | | | |
|---|---|---|---|---|---|---|
| 42% | 37% | 33% | 39% | 32% | 31% | 44% |
| 129 | 115 | 138 | 116 | 124 | 116 | 109 |
| IMPORTED | LIGHT LOW CAL | CRAFT/ MICROBREWED | VODKA | TEQUILA | RUM | DOMESTIC DINNER/ TABLE WINES |

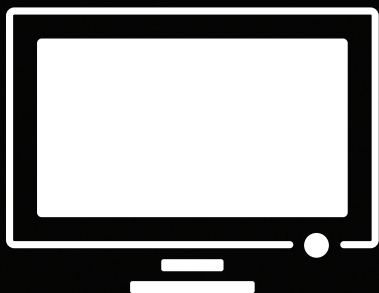● BEER   ● SPIRITS   ● WINE & OTHER ALCOHOL

LDA festival goers represent a market waiting to be tapped by music-savvy brands. These consumers are diverse high engaged with both music and the Bev-Al category, and primed to be brand ambassadors. From Lollapalooza to Coachella and from London to Taiwan, the opportunities for BevAl brands in the festival space are bottomless.

## INTERNATIONAL ALCOHOL INTERESTS

### INTERNATIONAL - BEER AND SPIRITS

| | TOTAL | AUSTRIA | FRANCE | GERMANY | UK | USA | JAPAN |
|---|---|---|---|---|---|---|---|
| BEER (attended) | 29% | 24% | 23% | 30% | 28% | 36% | 32% |
| BEER (not attended) | 17% | 20% | 19% | 21% | 18% | 16% | 10% |
| SPIRITS (attended) | 26% | 20% | 22% | 25% | 32% | 37% | 17% |
| SPIRITS (not attended) | 13% | 16% | 13% | 13% | 18% | 18% | 4% |

ATTENDED LIVE MUSIC EVENT (P12M)   ● BEER   ● SPIRITS
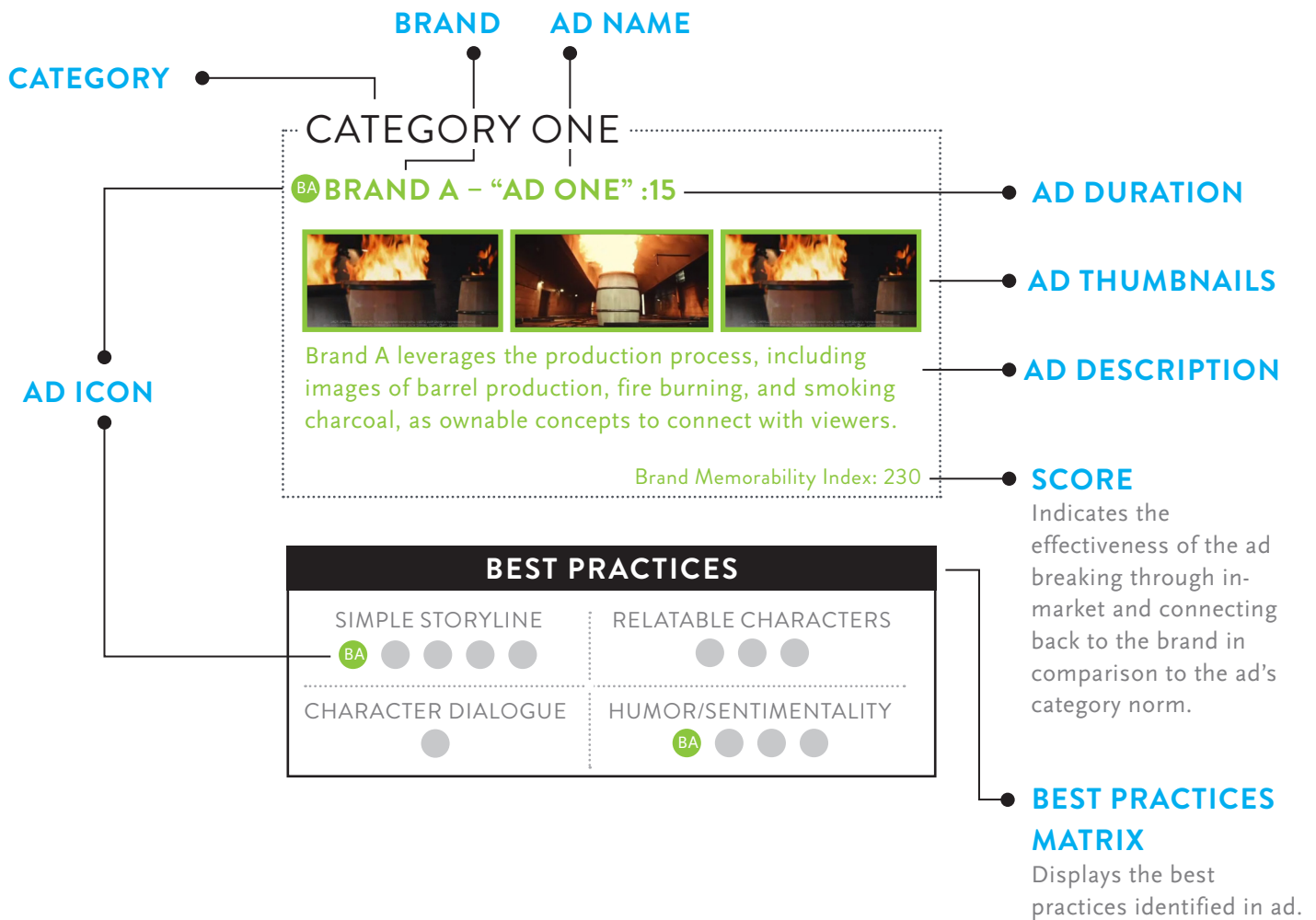NOT ATTENDED LIVE MUSIC EVENT (P12M)   ● BEER   ● SPIRITS

# THE BEST OF THE BEST: TOP BEV-AL TELEVISION ADS

Today's consumers have more access to more information than ever before, and we are consuming information at a faster and faster rate. The average adult (21+) watches about five hours of TV per day. This equates to about 300 ad impressions each day, or 1,750 ad impressions per week.

The ads showcased in this section were able to break through the clutter of real-world TV ad viewing—including the impact of multi-tasking and life's many other distractions—to deliver high performance in Brand Memorability.

# HOW TO READ TOP ADS PERFORMANCE SECTION

**CATEGORY**

**BRAND**    **AD NAME**

## CATEGORY ONE

**BA BRAND A – "AD ONE" :15**

**AD DURATION**

**AD THUMBNAILS**

**AD ICON**

Brand A leverages the production process, including images of barrel production, fire burning, and smoking charcoal, as ownable concepts to connect with viewers.

**AD DESCRIPTION**

Brand Memorability Index: 230

**SCORE**
Indicates the effectiveness of the ad breaking through in-market and connecting back to the brand in comparison to the ad's category norm.

### BEST PRACTICES

| SIMPLE STORYLINE | RELATABLE CHARACTERS |
|---|---|
| BA ⬤ ⬤ ⬤ ⬤ | ⬤ ⬤ ⬤ |
| CHARACTER DIALOGUE | HUMOR/SENTIMENTALITY |
| ⬤ | BA ⬤ ⬤ ⬤ |

**BEST PRACTICES MATRIX**
Displays the best practices identified in ad.
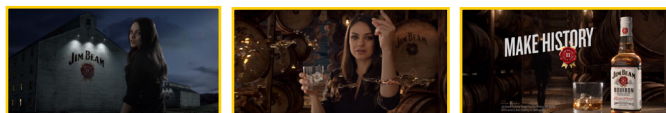
NIELSEN TV BRAND EFFECT

## SPIRITS

### JD JACK DANIELS – "OLD FASHIONED" :30
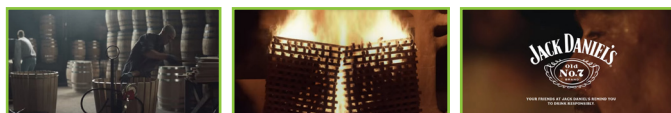
For the 4th quarter in a row, this Jack Daniel's creative achieved the top score in the Spirits category. Firm support behind this creative has resulted in sustained in-market resonance for the brand.

Q2-2016 Brand Memorability Index: 191

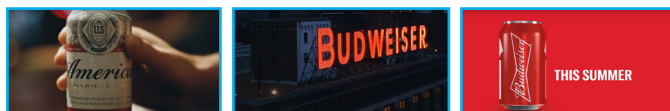### JM JIM BEAM – "A LOOK INSIDE" :30

This Jim Beam spot featuring Mila Kunis leverages on-screen dialogue and introduces the brand early into the spot to resonate with consumers and rank at the top of the category.

Q2-2016 Brand Memorability Index: 122
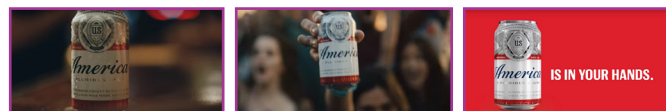
## BEER

### BH BUDWEISER – "HARD WORK" :15

When it comes to hard work, this :15 second spot is delivering it for Budweiser. Using relatable characters and strong branding execution, this spot resonated with LDA consumers in America.

Q2-2016 Brand Memorability Index: 191

### BA BUDWEISER – "AMERICA" :30

The "long-format" version of the Hard Work spot delivered strong results as its counterpart by employing relatable characters and situations across the American landscape and strong branding execution.

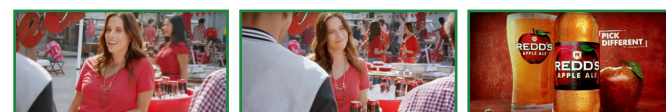Q2-2016 Brand Memorability Index: 152

## FMBs & CIDERS

### RD REDD'S – "DOMINO EFFECT" :15

After being absent last quarter, Redd's is back on top with the Domino Effect creative. The spot employs a simple storyline with relatable characters while highlighting the brand early and often.

Q2-2016 Brand Memorability Index: 213

### RB REDD'S – "BLOCK PARTY" :15

This spot employs Breakthrough best practices like humor and a simple storyline, coupled with strong branding execution, to resonate with LDA consumers and help Redd's sweep the Flavored Malt Beverages (FMBs) & Ciders category this quarter.

Q2-2016 Brand Memorability Index: 209

| BREAKTHROUGH BEST PRACTICES | |
|---|---|
| SIMPLE STORYLINE | RELATABLE CHARACTERS |
| JD ⬤⬤⬤ RD RB | JD ⬤ BH BA RD RB |
| CHARACTER DIALOGUE | HUMOR/SENTIMENTALITY |
| ⬤ JM ⬤⬤ RD RB | JD ⬤⬤ BA RD RB |

| BRANDING BEST PRACTICES | |
|---|---|
| EARLY VISUAL/VERBAL CUES | LEVERAGE BRAND ICON |
| ⬤ JM BH BA RD RB | ⬤⬤⬤⬤ RD RB |
| OWNABLE CONCEPT | BRAND IN STORYLINE |
| JD ⬤ BH BA RD RB | ⬤ JM BH BA RD RB |
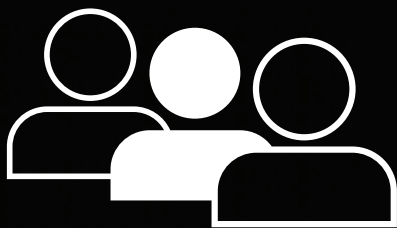
# GENERATIONAL SNAPSHOT

# GENERATIONAL SNAPSHOT: A LOOK AT MILLENNIALS, GENERATION X AND BABY BOOMERS

The following snapshot outlines the media behavior of Millennials, Generation X and Baby Boomers. The purpose of this document is to provide high-level generational data that is reusable and easily accessible.

The snapshot contains an Audience Profile across a variety of demographic factors and looks at TV, online and mobile.

| MILLENNIALS | GENERATION X | BABY BOOMERS |
|---|---|---|
| AGE IN 2016 -------- 21-36 | ---------------- 37-51 | -------------- 52-69 -------- |

## AUDIENCE COMPOSITION, MAY 2016

% OF POPULATION

| | | | | | | % OF POPULATION |
|---|---|---|---|---|---|---|
| PERSONS 70-99 | 79% | 9% | 7% | 2% 3% | | 9% |
| PERSONS 52-69 | 71% | 13% | 11% | 2% 3% | | 24% |
| PERSONS 37-51 | 61% | 13% | 18% | 2% 5% | | 20% |
| PERSONS 21-36 | 58% | 14% | 21% | 2% 5% | | 21% |

⬤ WHITE (NON-HISPANIC)   ⬤ BLACK (NON-HISPANIC)   ⬤ HISPANIC   ⬤ ASIAN AMERICAN   ⬤ OTHER
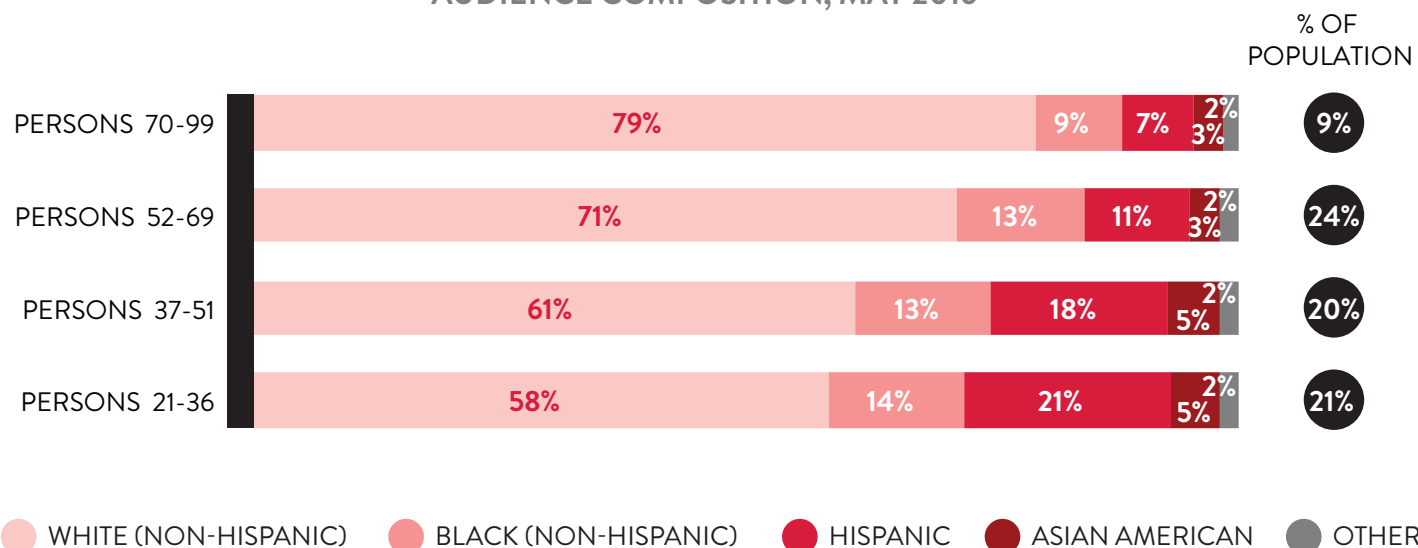
Source: NPOWER, based on scaled installed counts, P21-36, P37-51, P52-59, P70-99, May 2016

# DEVICE PENETRATION BY GENERATION

| | DVD | DVR | GAME CONSOLES | VCR | HDTV | TABLETS | SMARTPHONE | SVOD |
|---|---|---|---|---|---|---|---|---|
| MILLENNIALS | 66% | 51% | 67% | 0% | 90% | 68% | 96% | 72% |
| GENERATION X | 80% | 59% | 64% | 1% | 93% | 72% | 94% | 65% |
| BABY BOOMERS | 84% | 56% | 34% | 1% | 93% | 60% | 82% | 48% |

● MILLENNIALS ● GENERATION X ● BABY BOOMERS

# TV ACTIVITY

## TOP BROADCAST

| MILLENNIALS | | MM:SS | GENERATION X | | MM:SS | BABY BOOMERS | | MM:SS |
|---|---|---|---|---|---|---|---|---|
| PROGRAM | | MM:SS | PROGRAM | | MM:SS | PROGRAM | | MM:SS |
| FOX | EMPIRE | 13:14* | NBC | TODAY SHOW | 34:28 | ABC | GOOD MORNING, AMERICA | 57:02 |
| NBC | TODAY SHOW | 10:42 | ABC | GOOD MORNING, AMERICA | 29:19 | NBC | TODAY SHOW | 51:45 |
| UNI | DESPIERTA AMERICA | 10:39 | NBC | VOICE | 25:24 | CBS | YOUNG AND THE RESTLESS | 51:41 |
| ABC | GOOD MORNING, AMERICA | 10:18 | CBS | YOUNG AND THE RESTLESS | 22:03 | NBC | VOICE | 46:06 |
| NBC | VOICE | 10:14 | NBC | TONIGHT SHOW | 19:18 | ABC | DANCING WITH THE STARS | 43:50 |

## TOP CABLE

| MILLENNIALS | | MM:SS | GENERATION X | | MM:SS | BABY BOOMERS | | MM:SS |
|---|---|---|---|---|---|---|---|---|
| PROGRAM | | MM:SS | PROGRAM | | MM:SS | PROGRAM | | MM:SS |
| HBO | GAME OF THRONES | 13:50 | HBO | GAME OF THRONES | 16:11 | CNN | CNN NEWSROOM | 36:17 |
| USA | WWE ENTERTAINMENT | 11:32 | CNN | CNN NEWSROOM | 15:05 | FNC | FOX AND FRIENDS | 34:01 |
| AMC | FEAR THE WALKING DEAD | 7:10 | USA | WWE ENTERTAINMENT | 14:04 | FNC | AMERICAS NEWSROOM | 25:57 |
| VH1 | LOVE & HIP HOP ATLANTA 5 | 6:50 | HLN | MORNING EXPRESS W/ MEADE | 11:17 | FNC | THE OREILLY FACTOR | 22:09 |
| CNN | CNN NEWSROOM | 6:14 | AMC | FEAR THE WALKING DEAD | 11:13 | MSNBC | MSNBC LIVE | 21:22 |

*The average Millennial watches Empire for 13 minutes and 14 seconds in May 2016
Source: NPOWER, P21-36, P37-51, P52-69, May 2016. Excludes Specials, Programs less than 5 min, Repeats, Sports & shows w/ only one telecast. Rank is based on average time spent by program.

## TOP SYNDICATED PROGRAMS STRIP (MON-FRI)

| MILLENNIALS | | MM:SS | GENERATION X | | MM:SS | BABY BOOMERS | | MM:SS |
|---|---|---|---|---|---|---|---|---|
| WB. TV | BIG BANG | 14:30 | WB. TV | BIG BANG | 27:20 | CBS | JUDGE JUDY | 48:14 |
| 20TH TV | FAMILY FEUD | 13:57 | 20TH TV | FAMILY FEUD | 23:28 | 20TH TV | FAMILY FEUD | 44:33 |
| 20TH TV | MODERN FAMILY | 11:51 | CBS | JUDGE JUDY | 21:57 | CBS | DR. PHIL SHOW | 43:05 |
| NBCU | MAURY | 10:57 | CBS | DR. PHIL SHOW | 20:18 | CBS | WHEEL OF FORTUNE | 42:00 |
| 20TH TV | FAMILY GUY | 10:42 | DISNEY | LIVE WITH KELLY | 19:30 | DISNEY | LIVE WITH KELLY | 40:12 |

## TOP SYNDICATED PROGRAMS ONCE-A-WEEK (SAT-SUN)

| MILLENNIALS | | MM:SS | GENERATION X | | MM:SS | BABY BOOMERS | | MM:SS |
|---|---|---|---|---|---|---|---|---|
| NBCU | LAW & ORDER:SVU | 5:06 | WB. TV | BIG BANG | 7:43 | NBCU | LAW & ORDER:SVU | 10:54 |
| WB. TV | BIG BANG | 4:08 | NBCU | LAW & ORDER:SVU | 7:32 | WB. TV | BIG BANG | 9:47 |
| 20TH TV | FAMILY GUY | 2:52 | DADT | WEEKEND ADVENTURE | 4:45 | DADT | WEEKEND ADVENTURE | 9:29 |
| DADT | WEEKEND ADVENTURE | 2:05 | WB. TV | CLOSER | 3:30 | WB. TV | CLOSER | 8:35 |
| WB. TV | 2 BROKE GIRLS | 2:00 | WB. TV | 2 BROKE GIRLS | 3:04 | CBS | BLUE BLOODS | 5:41 |

Source: NPOWER, P21-36, P37-51, P52-69, May 2016. Excludes Specials, Programs less than 5 min, Repeats, Sports & shows w/ only one telecast. Rank is based on average time spent by program.

# DIGITAL ACTIVITY

## TOP PC SITES

| MILLENNIALS | | | GENERATION X | | | BABY BOOMERS | | |
|---|---|---|---|---|---|---|---|---|
| NAME | UA (000) | TPP (HH:MM) | NAME | UA (000) | TPP (HH:MM) | NAME | UA (000) | TPP (HH:MM) |
| Google | 33,898 | 4:35 | Google | 35,328 | 4:08 | Google | 37,145 | 3:27 |
| MSN | 23,886 | 2:29 | MSN | 26,242 | 2:55 | MSN | 31,003 | 3:13 |
| Facebook | 22,694 | 7:43 | Facebook | 25,410 | 10:59 | Facebook | 29,950 | 12:56 |
| YouTube | 21,199 | 7:35 | Yahoo | 23,235 | 3:24 | Yahoo | 27,150 | 4:19 |
| Yahoo | 20,078 | 2:00 | YouTube | 21,656 | 4:10 | YouTube | 23,211 | 3:06 |

## TOP PC SOCIAL NETWORKS

| MILLENNIALS | | | GENERATION X | | | BABY BOOMERS | | |
|---|---|---|---|---|---|---|---|---|
| NAME | UA (000) | TPP (HH:MM) | NAME | UA (000) | TPP (HH:MM) | NAME | UA (000) | TPP (HH:MM) |
| Facebook | 22,694 | 7:43 | Facebook | 25,410 | 10:59 | Facebook | 29,950 | 12:56 |
| Twitter.com | 8,513 | 2:07 | Twitter.com | 8,970 | 1:14 | Twitter.com | 9,428 | 0:28 |
| Blogger | 7,617 | 0:23 | Pinterest | 8,389 | 0:37 | Pinterest | 9,371 | 0:24 |
| Pinterest | 7,418 | 0:28 | Blogger | 8,289 | 0:17 | Blogger | 8,132 | 0:15 |
| Instagram | 6,978 | 0:18 | LinkedIn | 6,841 | 0:28 | LinkedIn | 8,124 | 0:34 |

Source: Online NetView Top Overall Brands, Top Member Communities, P21-36, P37-51, P52-69, May 2016
Note: UA = Unique Audience; TPP = Time per Person

## TOP SMARTPHONE APPLICATIONS

| MILLENNIALS | | | GENERATION X | | | BABY BOOMERS | | |
|---|---|---|---|---|---|---|---|---|
| NAME | UA (000) | TPP (HH:MM) | NAME | UA (000) | TPP (HH:MM) | NAME | UA (000) | TPP (HH:MM) |
| Facebook | 50,720 | 18:55 | Facebook | 42,772 | 18:14 | Facebook | 48,806 | 14:05 |
| Facebook Messenger | 46,168 | 2:36 | Facebook Messenger | 37,685 | 1:57 | Facebook Messenger | 42,305 | 1:27 |
| YouTube | 45,321 | 3:01 | YouTube | 33,646 | 1:49 | Google Search | 38,575 | 2:41 |
| Google Maps | 39,961 | 1:41 | Google Maps | 29,329 | 1:27 | Google Play | 33,346 | 0:26 |
| Instagram | 34,927 | 5:15 | Google Search | 29,187 | 2:29 | Google Maps | 32,709 | 0:53 |

## TOP PC VIDEO BRANDS

| MILLENNIALS | | | GENERATION X | | | BABY BOOMERS | | |
|---|---|---|---|---|---|---|---|---|
| NAME | UA (000) | TPP (HH:MM) | NAME | UA (000) | TPP (HH:MM) | NAME | UA (000) | TPP (HH:MM) |
| YouTube | 21,972 | 22:10 | YouTube | 23,709 | 12:25 | YouTube | 27,228 | 7:30 |
| Facebook | 10,504 | 2:10 | Facebook | 12,998 | 2:18 | Facebook | 15,225 | 2:58 |
| VEVO | 9,656 | 4:30 | VEVO | 8,378 | 2:02 | Yahoo | 9,078 | 0:56 |
| Yahoo | 4,974 | 0:49 | Yahoo | 6,682 | 0:42 | VEVO | 7,181 | 1:56 |
| Vimeo Websites | 3,600 | 0:18 | Vimeo Websites | 4,911 | 0:17 | Vimeo Websites | 5,627 | 0:12 |

Source: Mobile NetView P21-36, P37-51, P52-69, May 2016; Video Census, P21-36, P37-51, P52-69, May 2016
Note: UA = Unique Audience; TPP = Time per Person

Mobile data are obtained through convenience panels which are recruited in English only and, as such, have limited representation of non-English speaking panelists. This limited representation may understate metrics of non-English speaking language audiences.
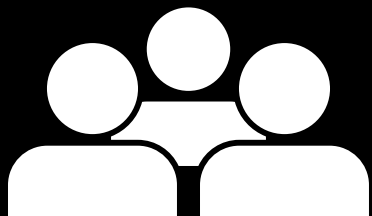
# LDA AUDIENCE MEDIA CONSUMPTION

# TOTAL LDA AUDIENCE MEDIA CONSUMPTION

## AVERAGE TIME SPENT PER ADULT 21+ PER DAY

**EXHIBIT 1 - BASED ON THE TOTAL U.S. POPULATION**

**Q2 2016**
- 0:07
- 0:14
- LIVE TV: 4:17
- DVR/TIME-SHIFTED TV: 0:32
- AM/FM RADIO: 1:54
- INTERNET ON A PC: 0:59
- APP/WEB ON A SMARTPHONE: 1:45
- APP/WEB ON A TABLET: 0:33
- 0:12

**Q2 2015**
- 0:07
- 0:09
- 0:21
- LIVE TV: 4:18
- DVR/TIME-SHIFTED TV: 0:30
- AM/FM RADIO: 1:52
- INTERNET ON A PC: 0:45
- APP/WEB ON A SMARTPHONE: 1:09
- 0:11

**Q2 2014**
- 0:08
- 0:04
- 0:14
- LIVE TV: 4:26
- DVR/TIME-SHIFTED TV: 0:29
- AM/FM RADIO: 1:54
- INTERNET ON A PC: 0:49
- APP/WEB ON A SMARTPHONE: 1:00
- 0:08

Legend:
- ● LIVE TV
- ● DVR/TIME-SHIFTED TV
- ● AM/FM RADIO
- ● DVD/BLU-RAY DEVICE
- ● GAME CONSOLE
- ● MULTIMEDIA DEVICE
- ● INTERNET ON A PC
- ● APP/WEB ON A SMARTPHONE
- ● APP/WEB ON A TABLET

*Panel enhancements made in March 2016 impacted mobile reporting.*

Mobile data are obtained through convenience panels which are recruited in English only and, as such, have limited representation of non-English speaking panelists. This limited representation may understate metrics of non-English speaking language audiences.
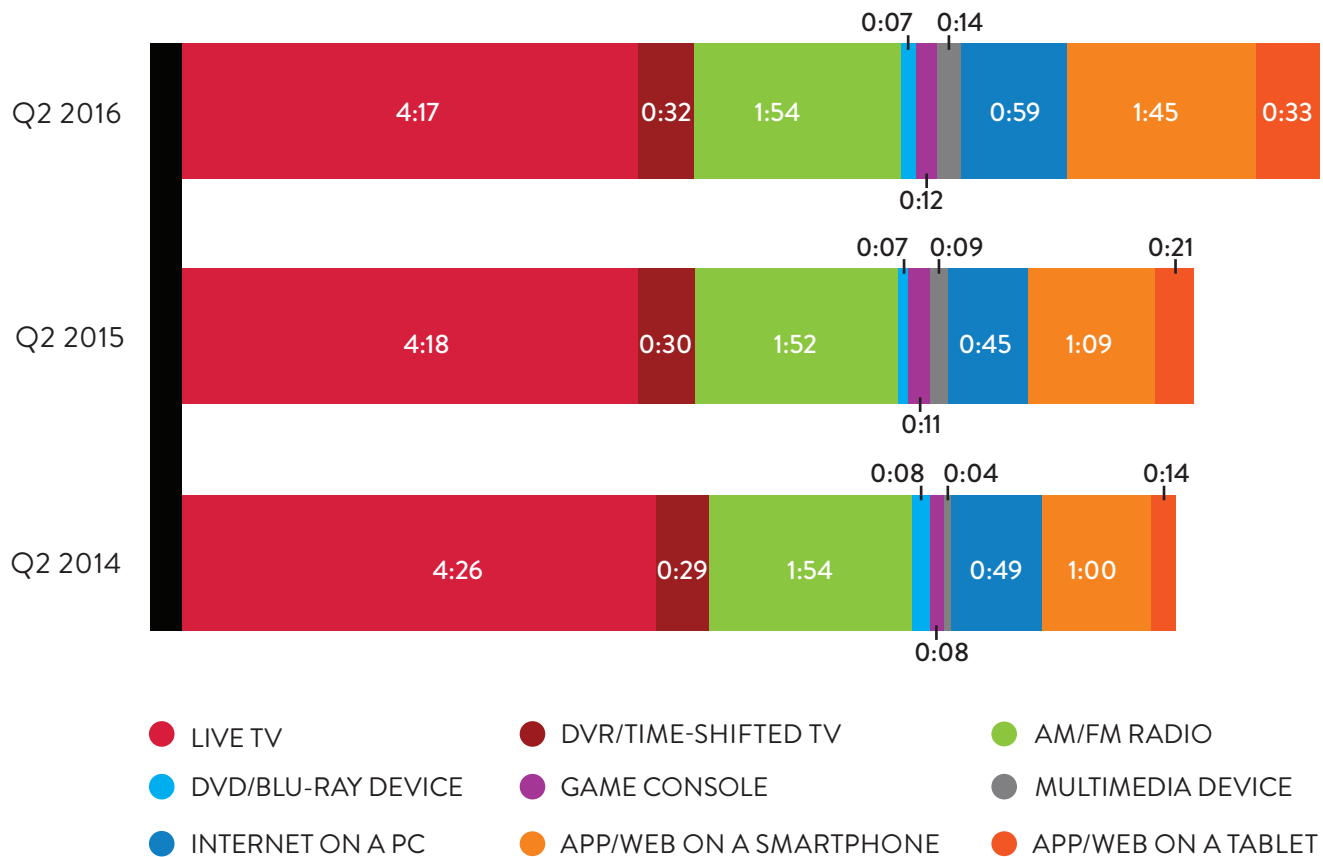
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### TABLE 1A - WEEKLY TIME SPENT IN HOURS: MINUTES AMONG U.S. POPULATION FOR Q2 2016

|  | A 21-34 | A 25-34 | A 35-49 | A 50-64 | A 65+ | A 21+ | BLACK 21+ | HISP. 21+ | ASIAN AM. 21+ |
|---|---|---|---|---|---|---|---|---|---|
| Live+DVR/Time-shifted TV | 19:38 | 20:56 | 29:00 | 40:18 | 48:38 | 33:40 | 49:50 | 26:27 | 16:43 |
| DVR/Time-shifted TV | 2:23 | 2:44 | 4:00 | 4:21 | 4:01 | 3:41 | 3:28 | 2:25 | 2:09 |
| AM/FM Radio | 11:10 | 11:40 | 13:42 | 15:15 | 12:37 | 13:15 | 13:48 | 14:04 | n/a |
| DVD/Blu-ray Device | 0:52 | 0:57 | 1:01 | 0:52 | 0:38 | 0:52 | 1:00 | 0:48 | 0:34 |
| Game Console | 3:26 | 3:06 | 1:20 | 0:24 | 0:06 | 1:22 | 1:33 | 1:23 | 0:52 |
| Multimedia Device | 2:33 | 2:43 | 1:50 | 1:12 | 0:46 | 1:38 | 1:31 | 1:37 | 2:54 |
| Internet on a PC | 6:55 | 7:40 | 8:23 | 7:39 | 3:58 | 6:54 | 7:50 | 5:08 | 4:31 |
| Video on a PC | 2:38 | 2:49 | 2:12 | 1:33 | 0:39 | 1:49 | 3:02 | 1:46 | 1:31 |
| App/Web on a Smartphone | 16:05 | 13:46 | 14:48 | 13:10 | 2:54 | 12:15 | 13:11 | 14:36 | 10:16 |
| Video on a Smartphone | 0:41 | 0:31 | 0:27 | 0:17 | IFR | 0:23 | 0:40 | 0:42 | 0:26 |

### TABLE 1B - WEEKLY TIME SPENT IN HOURS: MINUTES AMONG U.S. POPULATION FOR Q2 2015

|  | A 21-34 | A 25-34 | A 35-49 | A 50-64 | A 65+ | A 21+ | BLACK 21+ | HISP. 21+ | ASIAN AM. 21+ |
|---|---|---|---|---|---|---|---|---|---|
| Live+DVR/Time-shifted TV | 20:41 | 22:09 | 29:17 | 39:55 | 48:02 | 33:43 | 48:56 | 27:45 | 17:44 |
| DVR/Time-shifted TV | 2:33 | 2:58 | 3:53 | 4:07 | 3:40 | 3:33 | 3:11 | 2:23 | 2:10 |
| AM/FM Radio | 11:10 | 11:30 | 13:33 | 14:56 | 12:19 | 13:04 | 13:34 | 13:43 | n/a |
| DVD/Blu-ray Device | 0:56 | 0:59 | 0:59 | 0:57 | 0:37 | 0:53 | 1:04 | 0:51 | 0:39 |
| Game Console | 3:20 | 2:54 | 1:10 | 0:22 | 0:07 | 1:18 | 1:38 | 1:23 | 0:56 |
| Multimedia Device | 1:41 | 1:45 | 1:13 | 0:43 | 0:29 | 1:03 | 0:45 | 0:54 | 2:22 |
| Internet on a PC | 5:30 | 5:49 | 6:13 | 5:41 | 3:01 | 5:15 | 6:03 | 3:51 | 4:04 |
| Video on a PC | 2:06 | 2:08 | 1:50 | 1:20 | 0:31 | 1:30 | 2:05 | 1:14 | 1:12 |
| App/Web on a Smartphone | 11:43 | 10:31 | 10:06 | 7:29 | 1:39 | 8:07 | 9:05 | 10:13 | 7:39 |
| Video on a Smartphone | 0:29 | 0:22 | 0:16 | 0:09 | IFR | 0:15 | 0:22 | 0:28 | 0:20 |

*Note: IFR represents data that is insufficient for reporting due to small sample sizes. n/a represents data unavailability.*
*Mobile data are obtained through convenience panels which are recruited in English only and, as such, have limited representation of non-English speaking panelists. This limited representation may understate metrics of non-English speaking language audiences.*

## TABLE 2 - USERS BY MEDIUM
### NUMBER OF USERS 21+ (IN 000'S) - MONTHLY REACH

|  | COMPOSITE | | BLACK | | HISPANIC | | ASIAN AMERICAN | |
|---|---|---|---|---|---|---|---|---|
|  | Q2 15 | Q2 16 | Q2 15 | Q2 16 | Q2 15 | Q2 16 | Q2 15 | Q2 16 |
| Live+DVR/Time-shifted TV | 211,696 | 213,866 | 26,342 | 26,941 | 31,915 | 32,830 | 11,207 | 11,826 |
| DVR/Time-shifted TV | 137,784 | 147,652 | 16,533 | 18,225 | 17,104 | 19,513 | 6,445 | 7,170 |
| AM/FM Radio | 223,997 | 227,105 | 27,466 | 28,060 | 33,942 | 35,045 | n/a | n/a |
| DVD/Blu-ray Device | 94,198 | 82,525 | 10,838 | 9,550 | 13,190 | 11,691 | 4,525 | 3,603 |
| Game Console | 54,409 | 52,771 | 6,639 | 6,541 | 9,483 | 9,309 | 3,228 | 2,865 |
| Multimedia Device | 43,096 | 61,503 | 4,062 | 6,150 | 6,125 | 10,067 | 4,666 | 6,172 |
| Internet on a PC | 158,136 | 152,967 | 19,958 | 18,872 | 18,036 | 17,496 | 5,752 | 5,467 |
| Video on a PC | 115,672 | 105,626 | 14,769 | 13,210 | 12,578 | 11,495 | 4,404 | 3,961 |
| App/Web on a Smartphone | 167,265 | 195,778 | 20,143 | 23,891 | 27,873 | 32,881 | 9,689 | 11,136 |
| Video on a Smartphone | 124,879 | 151,048 | 16,384 | 18,762 | 22,603 | 25,680 | 7,153 | 8,364 |

## TABLE 3 - MONTHLY TIME SPENT AMONG USERS
### HOURS: MINUTES AMONG P21+

|  | COMPOSITE | | BLACK | | HISPANIC | | ASIAN AMERICAN | |
|---|---|---|---|---|---|---|---|---|
|  | Q2 15 | Q2 16 | Q2 15 | Q2 16 | Q2 15 | Q2 16 | Q2 15 | Q2 16 |
| Live+DVR/Time-shifted TV | 156:25 | 156:36 | 223:51 | 227:47 | 126:01 | 120:08 | 91:19 | 85:09 |
| DVR/Time-shifted TV | 25:21 | 24:46 | 23:11 | 23:26 | 20:16 | 18:30 | 19:22 | 18:08 |
| AM/FM Radio | 57:15 | 57:59 | 59:37 | 60:35 | 58:36 | 59:55 | n/a | n/a |
| DVD/Blu-ray Device | 9:16 | 10:21 | 11:56 | 12:48 | 9:17 | 10:13 | 8:22 | 9:26 |
| Game Console | 23:26 | 25:48 | 29:35 | 29:19 | 21:05 | 22:11 | 16:34 | 18:19 |
| Multimedia Device | 23:58 | 26:18 | 22:20 | 30:20 | 21:09 | 23:57 | 29:10 | 28:17 |
| Internet on a PC | 32:32 | 44:27 | 36:38 | 50:33 | 31:06 | 43:12 | 40:53 | 49:29 |
| Video on a PC | 12:49 | 16:59 | 17:06 | 27:42 | 14:22 | 22:43 | 15:54 | 22:32 |
| App/Web on a Smartphone | 45:44 | 59:32 | 52:50 | 64:31 | 51:24 | 62:49 | 42:54 | 53:10 |
| Video on a Smartphone | 1:59 | 2:24 | 2:52 | 4:12 | 3:07 | 3:51 | 2:43 | 3:02 |

*The data sources in Table 3 should not be added or subtracted; they are based on users of each medium and the bases vary by source.*
*Mobile data are obtained through convenience panels which are recruited in English only and, as such, have limited representation of non-English speaking panelists. This limited representation may understate metrics of non-English speaking language audiences.*

# n

## TABLE 4A - MONTHLY TIME SPENT IN HOURS: MINUTES AMONG USERS
### AMONG COMPOSITE

|  | A 21-34 | A 25-34 | A 35-49 | A 50-64 | A 65+ | A 21+ |
|---|---|---|---|---|---|---|
| Live+DVR/Time-shifted TV | 97:46 | 102:31 | 133:44 | 182:35 | 217:52 | 156:36 |
| DVR/Time-shifted TV | 17:27 | 18:54 | 25:11 | 28:07 | 28:13 | 24:46 |
| AM/FM Radio | 48:43 | 49:09 | 60:03 | 66:28 | 54:49 | 57:59 |
| DVD/Blu-ray Device | 12:59 | 13:06 | 10:44 | 9:32 | 8:08 | 10:21 |
| Game Console | 37:22 | 33:58 | 18:28 | 13:18 | 10:19 | 25:48 |
| Multimedia Device | 32:04 | 32:07 | 23:54 | 22:46 | 23:25 | 26:18 |
| Internet on a PC | 46:02 | 48:11 | 47:29 | 47:02 | 32:02 | 44:27 |
| Video on a PC | 26:07 | 26:07 | 18:17 | 13:25 | 7:36 | 16:59 |
| App/Web on a Smartphone | 64:48 | 61:56 | 63:38 | 53:52 | 43:49 | 59:32 |
| Video on a Smartphone | 3:23 | 2:54 | 2:19 | 1:40 | 0:58 | 2:24 |

## TABLE 4B - MONTHLY TIME SPENT IN HOURS: MINUTES AMONG USERS
### AMONG BLACKS

|  | A 21-34 | A 25-34 | A 35-49 | A 50-64 | A 65+ | A 21+ |
|---|---|---|---|---|---|---|
| Live+DVR/Time-shifted TV | 151:51 | 154:44 | 205:04 | 273:19 | 327:38 | 227:47 |
| DVR/Time-shifted TV | 18:45 | 20:12 | 25:28 | 27:19 | 20:47 | 23:26 |
| AM/FM Radio | 49:49 | 50:46 | 62:25 | 71:08 | 60:01 | 60:35 |
| DVD/Blu-ray Device | 15:20 | 15:06 | 14:50 | 11:22 | 8:04 | 12:48 |
| Game Console | 42:21 | 40:27 | 19:24 | 17:16 | 12:54 | 29:19 |
| Multimedia Device | 35:50 | 36:08 | 28:13 | 29:31 | 17:11 | 30:20 |
| Internet on a PC | 54:49 | 53:09 | 52:06 | 50:15 | 35:15 | 50:33 |
| Video on a PC | 42:56 | 45:57 | 28:38 | 17:32 | 10:52 | 27:42 |
| App/Web on a Smartphone | 73:43 | 77:44 | 72:31 | 55:08 | IFR | 64:31 |
| Video on a Smartphone | 6:38 | 5:06 | 3:08 | 3:27 | IFR | 4:12 |

*The data sources in Table 4 should not be added or subtracted; they are based on users of each medium and the bases vary by source.*
*Mobile data are obtained through convenience panels which are recruited in English only and, as such, have limited representation of non-English speaking panelists. This limited representation may understate metrics of non-English speaking language audiences.*

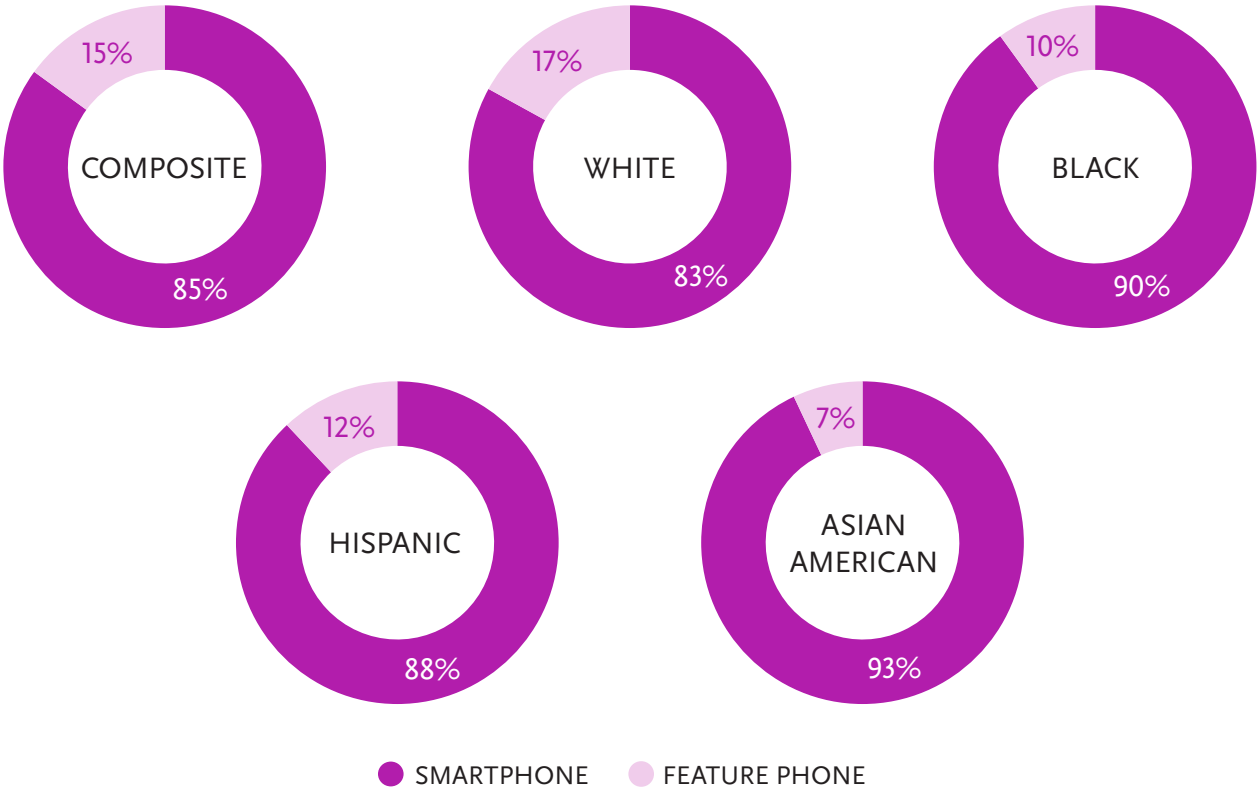## TABLE 4C - MONTHLY TIME SPENT IN HOURS: MINUTES AMONG USERS
### AMONG HISPANICS

|  | A 21-34 | A 25-34 | A 35-49 | A 50-64 | A 65+ | A 21+ |
|---|---|---|---|---|---|---|
| Live+DVR/Time-shifted TV | 84:13 | 89:07 | 113:27 | 151:52 | 200:36 | 120:08 |
| DVR/Time-shifted TV | 14:35 | 15:45 | 19:20 | 22:47 | 21:31 | 18:30 |
| AM/FM Radio | 51:46 | 53:08 | 64:54 | 69:39 | 57:54 | 59:55 |
| DVD/Blu-ray Device | 10:48 | 10:41 | 10:08 | 9:25 | 10:16 | 10:13 |
| Game Console | 29:39 | 26:43 | 14:35 | 12:47 | 13:46 | 22:11 |
| Multimedia Device | 26:51 | 27:13 | 21:30 | 22:42 | 20:58 | 23:57 |
| Internet on a PC | 48:55 | 52:25 | 40:25 | 37:37 | 41:36 | 43:12 |
| Video on a PC | 29:43 | 31:17 | 20:35 | 15:56 | 16:41 | 22:43 |
| App/Web on a Smartphone | 65:36 | 61:52 | 63:41 | 57:24 | IFR | 62:49 |
| Video on a Smartphone | 4:36 | 3:42 | 3:19 | 2:55 | IFR | 3:51 |

## TABLE 4D - MONTHLY TIME SPENT IN HOURS: MINUTES AMONG USERS
### AMONG ASIAN AMERICANS

|  | A 21-34 | A 25-34 | A 35-49 | A 50-64 | A 65+ | A 21+ |
|---|---|---|---|---|---|---|
| Live+DVR/Time-shifted TV | 55:59 | 60:10 | 69:14 | 102:03 | 137:46 | 85:09 |
| DVR/Time-shifted TV | 13:03 | 14:51 | 18:12 | 24:21 | 16:33 | 18:08 |
| DVD/Blu-ray Device | 13:15 | 11:32 | 9:49 | 6:58 | 8:05 | 9:26 |
| Game Console | 28:31 | 26:33 | 14:47 | 7:24 | 7:39 | 18:19 |
| Multimedia Device | 29:12 | 30:22 | 20:56 | 32:25 | 44:57 | 28:17 |
| Internet on a PC | 60:21 | 67:33 | 55:45 | 27:02 | 33:04 | 49:29 |
| Video on a PC | 32:34 | 32:27 | 18:06 | 14:53 | 17:33 | 22:32 |
| App/Web on a Smartphone | 59:52 | 58:14 | 55:21 | IFR | IFR | 53:10 |
| Video on a Smartphone | 3:34 | 3:23 | 2:03 | IFR | IFR | 3:02 |

*The data sources in Table 4 should not be added or subtracted; they are based on users of each medium and the bases vary by source.*
*Mobile data are obtained through convenience panels which are recruited in English only and, as such, have limited representation of non-English speaking panelists. This limited representation may understate metrics of non-English speaking language audiences.*

# n

**COMPOSITE**
15%
85%

**WHITE**
17%
83%

**BLACK**
10%
90%

**HISPANIC**
12%
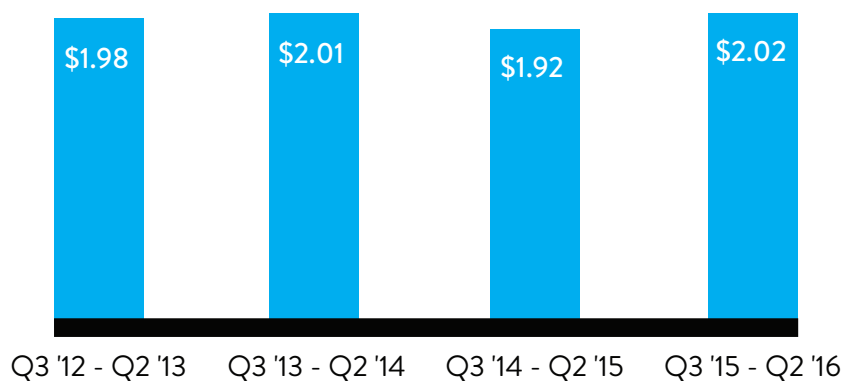88%

**ASIAN AMERICAN**
7%
93%

● SMARTPHONE    ● FEATURE PHONE

# BEV-AL
# MEDIA SPEND

# TOTAL INDUSTRY MEDIA SPEND BY YEAR AND CATEGORY

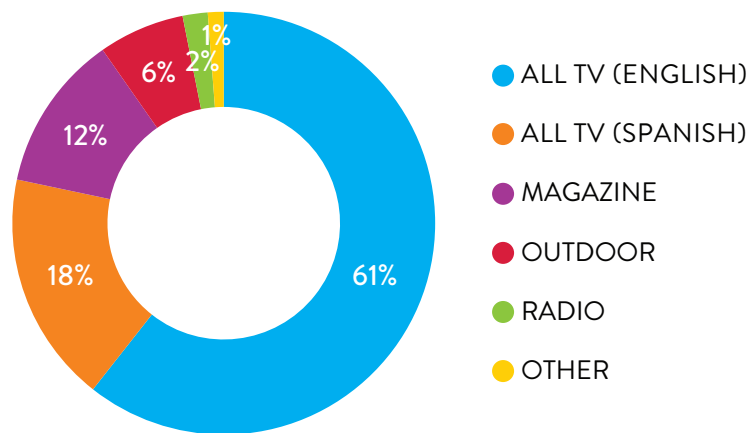## BEVERAGE ALCOHOL INDUSTRY ANNUAL TOTAL AD SPENDING IN BILLIONS

| Q3 '12 - Q2 '13 | Q3 '13 - Q2 '14 | Q3 '14 - Q2 '15 | Q3 '15 - Q2 '16 |
|---|---|---|---|
| $1.98 | $2.01 | $1.92 | $2.02 |

## BEVERAGE ALCOHOL INDUSTRY ANNUAL AD SPEND BY CATEGORY

| Category | Q3 '12 - Q2 '13 | Q3 '13 - Q2 '14 | Q3 '14 - Q2 '15 | Q3 '15 - Q2 '16 |
|---|---|---|---|---|
| BEER | $1.29B | $1.28B | $1.26B | $1.40B |
| SPIRITS | $492M | $536M | $398M | $339M |
| WINE & CHAMPAGNE | $97M | $87M | $100M | $111M |
| FMBs, CIDERS, OTHER | $91M | $106M | $162M | $171M |

● BEER   ● SPIRITS   ● WINE & CHAMPAGNE   ● FMBs, CIDERS, OTHER
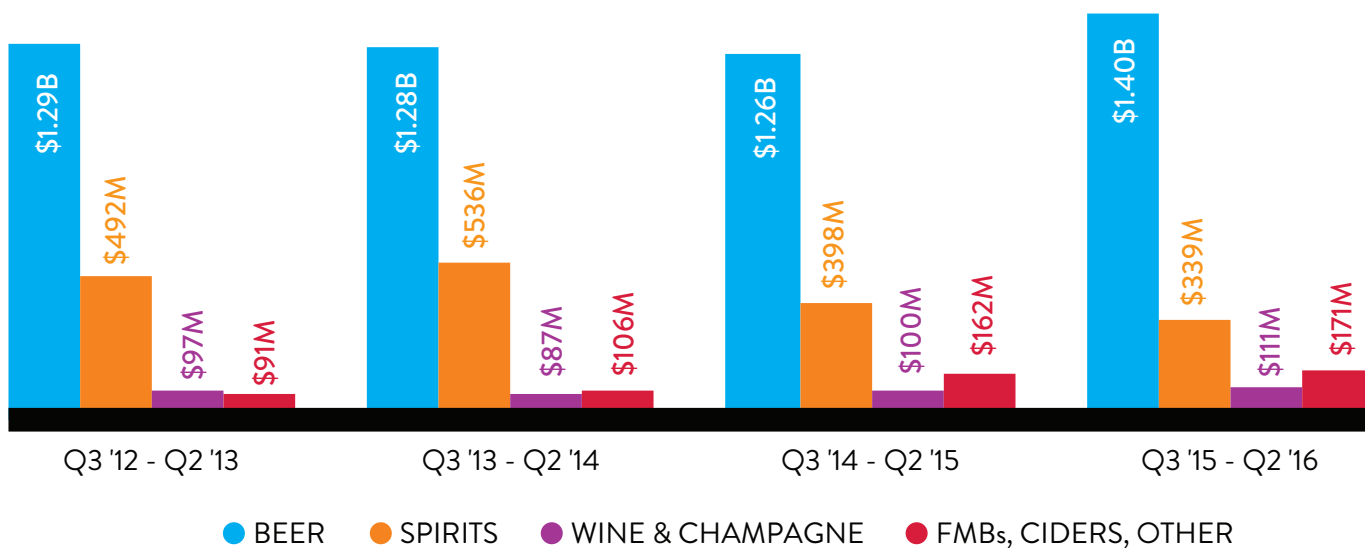
Source: Nielsen Ad Intel
*Figures do not include Digital

# Q3 '15 – Q2 '16 MEDIA SPEND BY AND MEDIA TYPE AND CATEGORY

## BEV-AL Q3 '15 – Q2 '16 AD SPEND BY MEDIA TYPE



- 61% — ALL TV (ENGLISH)
- 18% — ALL TV (SPANISH)
- 12% — MAGAZINE
- 6% — OUTDOOR
- 2% — RADIO
- 1% — OTHER

## BEV-AL Q3 '15 – Q2 '16 AD SPENDING DISTRIBUTION BY CATEGORY & MEDIA TYPE

| | ALL TV (ENGLISH) | ALL TV (SPANISH) | MAGAZINE | OUTDOOR | RADIO | OTHER |
|---|---|---|---|---|---|---|
| BEER | 63% | 23% | 5% | 6% | 2% | 1% |
| FMBs, CIDERS, OTHER | 66% | 9% | 16% | 5% | 3% | 1% |
| SPIRITS | 56% | 5% | 26% | 9% | 1% | 3% |
| WINE & CHAMPAGNE | 34% | 0% | 56% | 5% | 1% | 3% |

- ● ALL TV (ENGLISH)
- ● ALL TV (SPANISH)
- ● MAGAZINE
- ● OUTDOOR
- ● RADIO
- ● OTHER
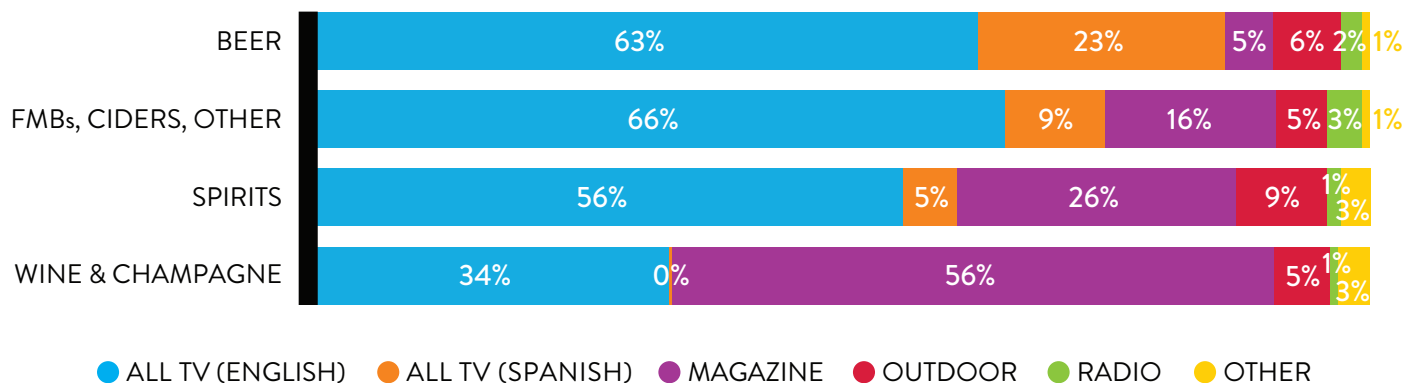
Source: Nielsen Ad Intel
*Figures do not include Digital
Radio spending based on top 43 markets

# 2H−2016 BEV-AL DIGITAL MEDIA SPEND

## DIGITAL MEDIA SPEND BY CATEGORY IN MILLIONS

$27.99

$11.35

$6.45

$3.69

57%

23%

13%

7%

● BEER    ● SPIRITS    ● FMBs, CIDERS, OTHER    ● WINE & CHAMPAGNE
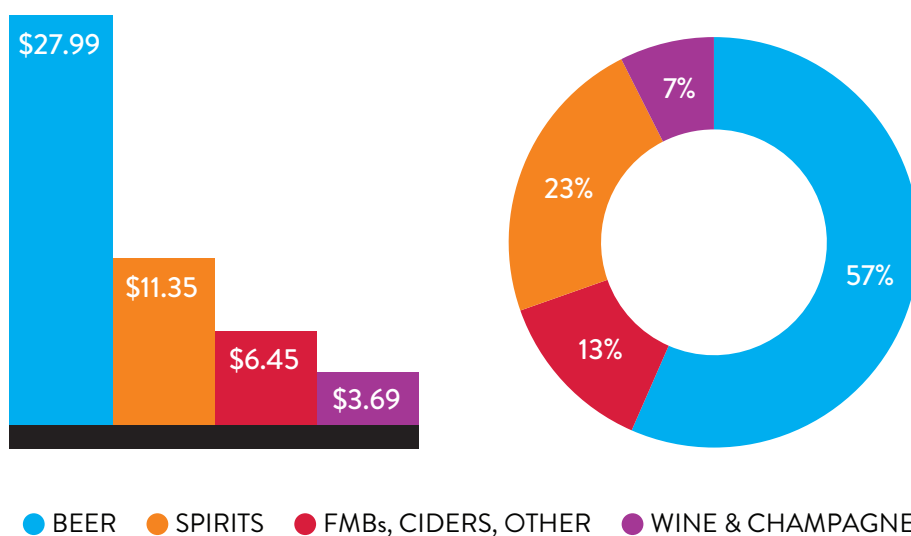
## DIGITAL MEDIA SPEND BY AD TYPE

| BEER | 73% | 27% |
|---|---|---|
| FMBs, CIDERS, OTHER | 69% | 31% |
| SPIRITS | 69% | 31% |
| WINE & CHAMPAGNE | 43% | 57% |
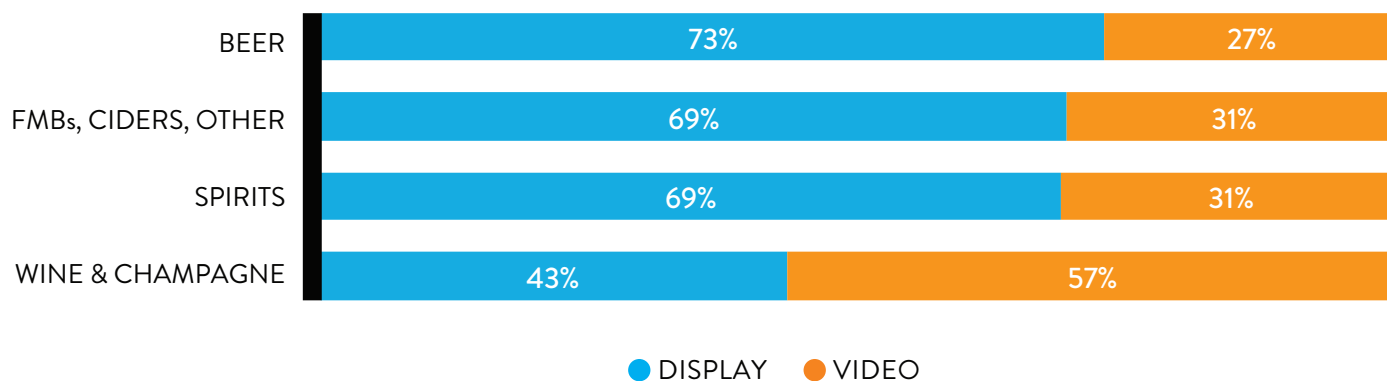
● DISPLAY    ● VIDEO

Source: Nielsen Ad Intel, powered by Pathmatics and Nielsen
Coverage: Display & Video on Desktop; Display on Mobile & Tablet Web

# SOURCING & METHODOLOGIES

## TELEVISION METHODOLOGY

Live+DVR/Time-shifted TV includes Live usage plus any playback viewing within the measurement period. DVR/Time-shifted TV is playback primarily on a DVR but includes playback from video on demand, DVD recorders, server based DVR's and services like Start Over.

TV-connected devices (DVD, Game Console, Multimedia Device) would include content being viewed on the TV screen through these devices. This would include when these devices are in use for any purpose, not just for accessing media content. For example, Game Console would also include when the game console is being used to play video games.

Multimedia Devices is a combination of usage of the Internet Connected Devices viewing source and Audio-Video viewing sources. It would include viewing on an Apple TV, Roku, Google Chromecast, Smartphone, Computer/Laptop, etc. connected to the TV.

Reach for television and TV-connected devices includes those viewing at least one minute within the measurement period.

Data used in this report is inclusive of multicultural audiences. Hispanic consumer audiences are comprised of both English and Spanish speaking representative populations.

The last phase of a two-year sample expansion initiative (referred to as NPX) was completed on December 28, 2015, essentially doubling the sample size of our National Panel. The official production ratings that comprise Nielsen's National television measurement service will be based on the larger panel of households. As with any past panel enhancements or methodology change, there is a trend break in the data when looking at year-over-year comparisons.

## AM/FM RADIO METHODOLOGY

Listening to programming from AM/FM radio stations or network programming.

Audience estimates for 48 large markets are based on a panel of people who carry a portable device called a Personal People Meter (PPM) that passively detects exposure to content that contains inaudible codes embedded within the program content. Audience estimates from the balance of markets and countries in the U.S. are based on surveys of people who record their listening in a written diary for a week.

The estimates in this report are based on RADAR and the National Regional Database. RADAR reports national network radio ratings covering the U.S. using both PPM and Diary measurement and it is based on a rolling one-year average of nearly 400,000 respondents. The Q1 2016 report is based on the June RADAR studies to more accurately align with the other included media. This adjustment is also reflected in the included historical data.

Monthly Radio Estimates: Nielsen's Measurement Science group used statistical modeling techniques to estimate the total cume audience to radio in a four week period, as compared to the total cume audience to radio in an average week. The methodology utilized PPM panel data, and essentially measured how many people who were not exposed to radio in a single week might typically be exposed to radio over a consecutive four week period. A radio cume growth factor was then determined and applied to radio listening on a national basis. In the Q1 2016 report, the model for monthly radio estimates has been refined to more accurately align with the other included media. This adjustment is also reflected in the included historical data.

Listening to HD radio broadcasts, Internet streams of AM/FM radio stations and Satellite Radio is included in the Persons Using Radio estimates in this report where the tuning meets our reporting and crediting requirements of at least 5 minutes of usage. Reach for AM/FM Radio includes those listening for at least 5 minutes within the measurement period.

Data used in this report is inclusive of multicultural audiences. Hispanic consumer audiences are comprised of both English and Spanish speaking representative populations.

## ONLINE METHODOLOGY

Nielsen's Online Panel is recruited based on an opt-in convenience panel. Online recruitment pages are offered in both English and Spanish. Panelists then download Nielsen's patented desktop NetSight meter, which accurately identifies which browser, tab, Internet application (including media players and instant messaging) or desktop application is in focus. Nielsen's Online Panel tracks usage across web sites and digital applications to deliver audience and analytics through metered measurement of panels of Internet users at both home and work. Online data are obtained through both probability-weighted and convenience panels which are recruited in Spanish and in English.

Nielsen Netview and VideoCensus data is reflective of the hybrid methodology which combines a census level accounting of page views and video streams where Nielsen measurement tags have been deployed in order to project audience and behavior to the full universe of all Internet users. For VideoCensus, the portion of the total video streams calibrated by census data, previously allocated to Home/Work computers, are now allocated to other devices and locations such as smartphones and viewing outside of home and work.

Hours:minutes for Internet and video use are based on the universe of persons who used the Internet/watched online video. All Internet figures are weekly or monthly averages over the course of the quarter. All Internet on a PC metrics are derived from Nielsen NetView, while all Video on a PC metrics are derived from Nielsen VideoCensus. The audience of Video on a PC is a subset of Internet on a PC.

As of August 2015, the rules used for crediting page views and duration within Netview have been updated with more comprehensive accounting of multi-tabbed browsing and iFrames, as well as the implementation of a longer timeout threshold for mouse/keyboard inactivity. These changes resulted in an increase in Internet duration on a PC.

Meter collection capability improved in February 2016, which generally resulted in increased audience, page view, stream and duration metrics for Internet on a PC.

## MOBILE METHODOLOGY

Nielsen's Electronic Mobile Measurement (EMM) is an observational, user-centric approach that uses passive metering technology on smartphones and tablets to track device and application usage on an opt-in convenience panel, recruited online and in English. Results are then reported out through Nielsen Mobile NetView 3.0. There are approximately 9,000 smartphone and 1,300 tablet panelists in the U.S. across both iOS and Android smartphone devices. This method provides a holistic view of all activity on the device as the behavior is being tracked without interruption.

A number of steps are taken after the data collection process to ensure the reported data is representative of the mobile population. For smartphones, weighting controls are applied across five characteristics (gender, age, income, race, and ethnicity) while independent enumeration studies are carried out on a continuous basis to provide the most current estimates of the mobile population (aka Universe Estimation).

Tablet data is unweighted and projections are applied using estimates from the National Panel that is the industry standard for TV ratings.

Figures reported in Nielsen's Mobile NetView 3.0 include those individuals who are P18+ who have used an iOS or Android device in the U.S. In particular:

App/Web refers to consuming mobile media content through a web browser or via a mobile app. It does not include other types of activity such as making/receiving phone calls, sending SMS/MMS messages etc, which has been excluded for this report.

Video is a subset of App/Web and refers to those individuals who visit a website or use a mobile app specifically designed to watch video content.

Weekly smartphone data is now based on weekly weights. This adjustment is also reflected in the included historical data.

In March 2016 Nielsen implemented a crediting enhancement to improve the reporting of mobile usage on iOS devices. A legacy crediting rule that capped usage at 30 minutes was removed, so now if a panelist uses an app or visits a website for more than 30 minutes at a time the entire duration is now credited towards the app or website. This crediting rule will also be implemented on Android devices in the coming months.

## TV BRAND EFFECT METHODOLOGY

Nielsen TV Brand Effect employs a nationally representative online panel of U.S. TV viewers who have watched programs within the past 24 hours. These panelists answer survey questions about the programs they watched and the commercials they were exposed to. Since the panelists respond based on what they watched in a natural environment, the results reflect real-life reaction to and memory of television commercials. Nielsen logs and issues surveys for all national commercials within its coverage dayparts and networks. Advertisements evaluated for this report were English-language ads viewed on English-language networks within TV Brand Effect coverage only.

## BRAND MEMORABILITY INDEX

The Brand Memorability Index represents an ad's Brand Memorability indexed against that ad's category average for adults 21+. A Brand Memorability Index of 100 indicates that the ad is performing at the category average.

## AD MEMORABILITY

The percentage of an ad's natural in-home viewers who are able to remember its content the next day.

## BRAND LINKAGE

Of those viewers who remember an ad's content (Ad Memorability), the percentage that are able to identify the advertised brand.

## BRAND MEMORABILITY

The percentage of viewers who are able to remember both the ad's content and the advertised brand (Ad Memorability * Brand Linkage).

**n**

## EXHIBIT 1 & TABLES 1, 2, 3, 4 – AVERAGE TIME SPENT PER ADULT 21+ PER DAY, WEEKLY TIME SPENT AMONG US POPULATION, USERS BY MEDIUM, MONTHLY TIME SPENT AMONG USERS

Source: Live+DVR/Time-shifted TV, DVR/Time-shifted TV, DVD, Game Consoles, Multimedia Devices 03/28/2016 - 06/26/2016 via Nielsen NPOWER/National Panel, Radio 06/18/15-06/15/16 via RADAR 130, PC 04/01/16-06/30/16 via Nielsen Netview and Nielsen VideoCensus, Smartphone 04/01/16-06/30/16 via Nielsen Electronic Mobile Measurement, Tablet 04/01/16-06/30/16 via Nielsen Electronic Mobile Measurement – unweighted, projections based on estimates from the NPOWER/National Panel.

Exhibit 1 and Table 1 are based on the total U.S. population whether or not they have the technology.

Tables 2-4 are based on users of each medium.

## EXHIBIT 2 – MOBILE DEVICE PENETRATION AMONG MOBILE SUBSCRIBERS 21+
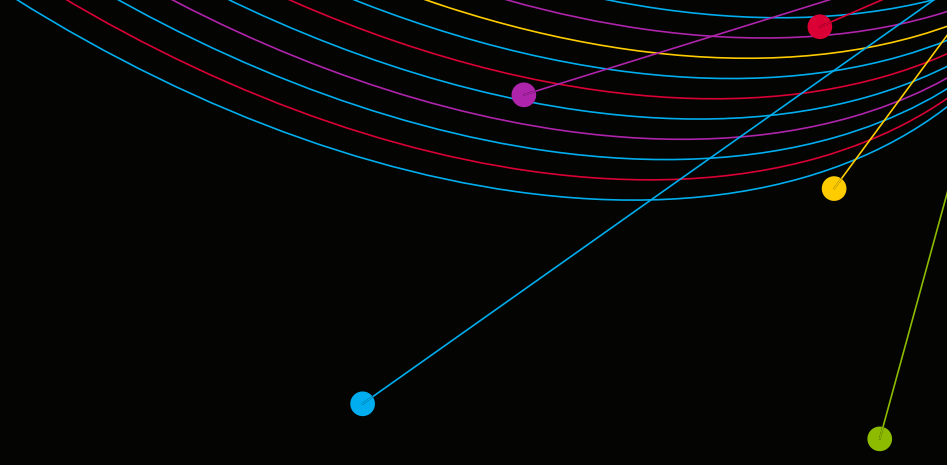Source: Mobile 04/01/16-06/30/16 via Nielsen Mobile Insights

## ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global performance
management company that provides a comprehensive understanding
of what consumers watch and buy. Nielsen's Watch segment provides
media and advertising clients with Total Audience measurement services
for all devices on which content — video, audio and text — is consumed.
The Buy segment offers consumer packaged goods manufacturers
and retailers the industry's only global view of retail performance
measurement. By integrating information from its Watch and Buy
segments and other data sources, Nielsen also provides its clients with
analytics that help improve performance. Nielsen, an S&P 500 company,
has operations in over 100 countries, covering more than 90% of the
world's population.

For more information, visit www.nielsen.com.

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