

# ENHANCING WINE OFF PREMISE COVERAGE, NIELSEN RETAIL SALES, & DTC SHIPMENTS - ALL IN ONE PLACE

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

## **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 10,000 wineries.
2. Nielsen then matches its off premise retail measurement data to the DtC shipment data at a variety of key product segment and geographic levels.

## **NIELSEN AND DTC WINE SHIPMENTS FEATURES & BENEFITS**

### **EXPANDS COVERAGE**



- Combines approximately \$17 billion of Nielsen off premise reported wine retail sales with over \$3 billion of reported DtC Shipment data (2019)
- Provides clients with additional category coverage
- Provides clients with 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)
- DtC Shipments only - Winery segment size

### **REPORTING FREQUENCY/TIMEFRAME**



- Standard 'aggregated' (Nielsen plus DtC shipments) reporting timeframe and delivery frequency is quarterly, along with monthly views of DtC shipments

**Monthly report snapshots available through at least June 2020**



# Nielsen and DtC Wine Shipments – Special Monthly Reports

## DtC Wine Shipments alongside Nielsen Off Premise Retail Sales and both channels reported together

Never has this been as important given today's channel shifting dynamics. So, while the standard ongoing report deliveries will be quarterly, we are introducing a set of special monthly reports in the

### ORIGINS:

- California - Napa, Sonoma, Central Coast, Rem CA
- Washington
- Oregon
- Rem 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

- Annual pre-COVID 19 (vs YAG)
- YTD 2020 (vs YAG)
- March, April, May, June 2020 (vs YAG)

### PRICE TIERS (per 750 ml equiv):

- <\$8
- \$8-\$10.99
- \$11-\$14.99
- \$15-\$19.99
- \$20-\$29.99
- \$30-\$49.99
- \$50-\$99.99
- \$100+

### TOP DESTINATION MARKETS

- Total U.S.
- California
- Florida
- Texas
- New York
- Washington
- Oregon
- Illinois

### DELIVERY

- Excel reports
- 3<sup>rd</sup> week of following month

**PRICING: \$2,900 per mos. report, or \$7,395 for each of April, May, June reports (March 2020 – free)**