



The Future of Brewing...  
...is in the balance





SOIN COO

Our history helps to shape our future.







Delighting the world's beer drinkers (in the future...)



A group of five business professionals (four men and one woman) are seen from behind, standing in a line and looking at a large, complex whiteboard. The whiteboard is covered in various hand-drawn diagrams, including flowcharts, a pie chart, a checklist with 'Yes' and 'No' options, a globe, and various arrows and boxes. The scene is dimly lit, with the whiteboard being the primary light source. The overall atmosphere is one of intense focus and complexity.

...in an ever more complicated  
landscape



Consumers remain cautious...

CONSUMER CONFIDENCE IS HOLDING UP... JUST

CPI Economy +3.0%  
Real Wage -3.5%

Minimum Unit Pricing from 1 May

Business Rates ...but so do suppliers & operators

FOR THE UK MARKET

HM Revenue & Customs

12345678910

BRITAIN

EUROPE

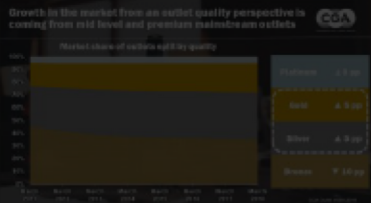
MERGER AHEAD



Consumers continue to moderate

1/3 of all Non-Drinkers are 50+ Females. They are gaining in importance too

...requires an ability to see the wood for the trees



70% of consumers either do, or would consider, paying extra for a better quality drink when out

120m Dinner Party occasions in the home in the latest year

That is 38m more than there were in 2012

...we live in smart homes

...Customer Experience is the key

85% of businesses now expect to compete mostly on the basis of customer experience versus just price four years ago

£3.50

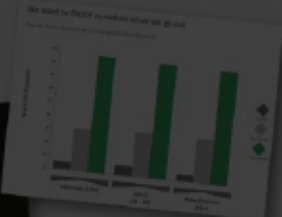
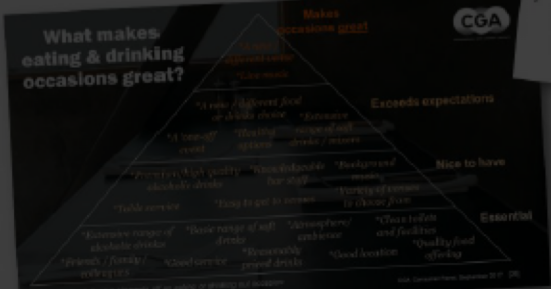
...and Premiumise their choices

### Experience

- 9/10 Alcohol occasions in the on trade feature just one venue
- Premium choices, enjoyment, customer service, serve experience and quality will differentiate



...a good night out is still about ENJOYMENT



Technology improving convenience

"A little more technology would not be a bad thing if it speeds up service"

Technological help is welcomed...





It's all in the  
interpretation...

headwinds or  
opportunities?







Understanding our consumers is key



# Who are the future consumers?

2016

43%

21%

32%

5%

2041

14%

16%

28%

42%

BABY BOOMERS & THE  
SILENT GENERATION

GEN X

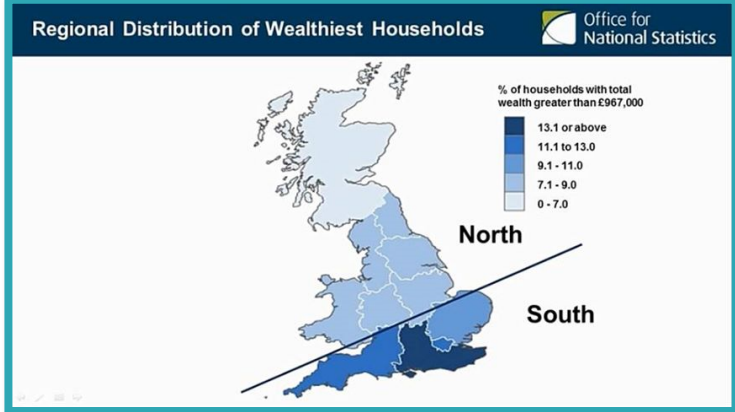
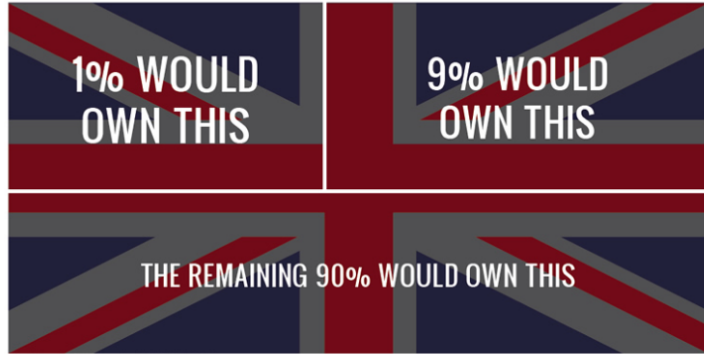
MILLENNIALS

GEN Z





# IF THE UK FLAG WAS DIVIDED LIKE UK WEALTH



We need to understand the consumer and then balance the range to meet their needs







LOOK TO THE PAST



LOOK AT FUTURE TRENDS



TALK TO CUSTOMERS



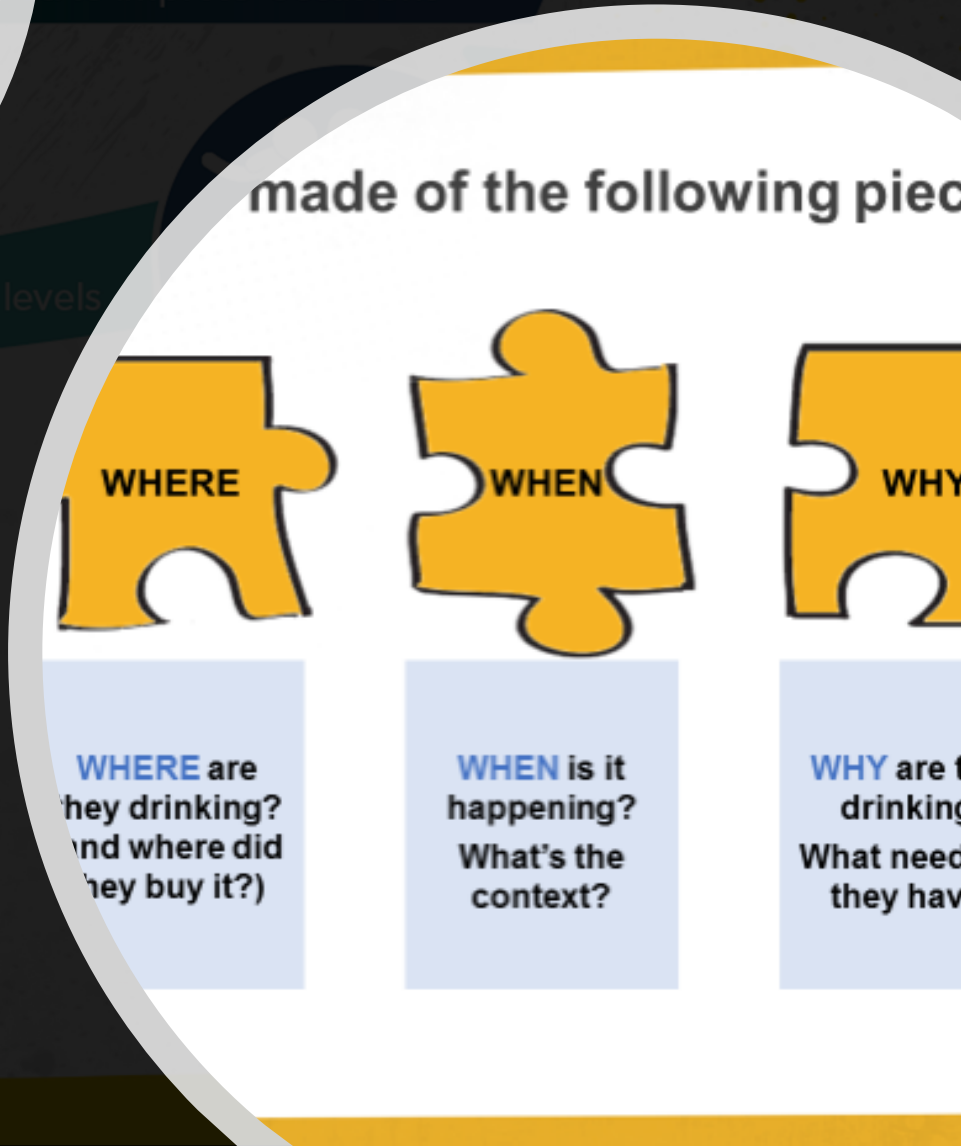
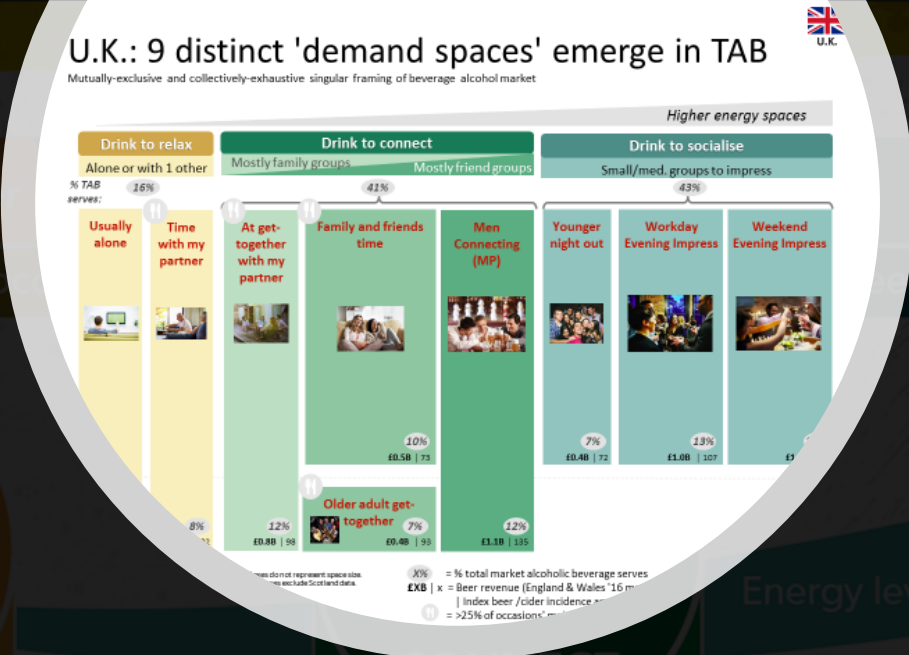
TALK TO CONSUMERS



So what?

...what are their occasions  
(who, what, when, why, where,  
with...)

Relax, Connect and Socialise





**AWARENESS AND DISCIPLINE  
TO GET, AND GIVE THE MOST  
OUT OF LIFE**



**SELF IDENTITY THROUGH  
EXPERIENCES**

...with many of  
the same  
needs



**HUMAN NEED TO 'STAY REAL'  
IN AN INCREASINGLY VIRTUAL  
EXISTENCE...**



**UNPRECEDENTED DEMAND FOR  
SERVICE & CONVENIENCE...**



**RELEVANT. PERSONALISED  
& TRUSTED**





...but knowing this is only the start. Different consumers across these occasions require many solutions





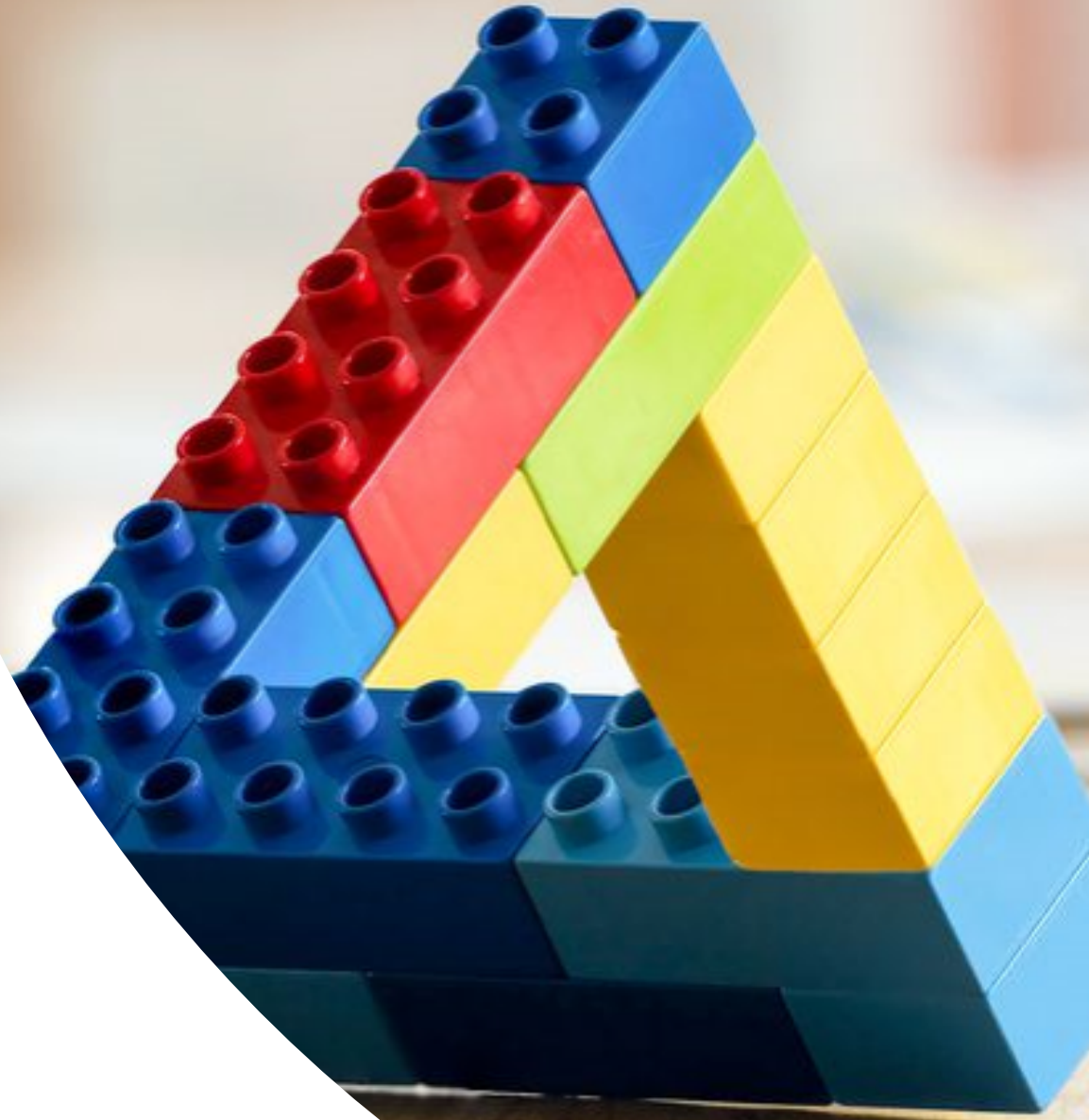


...and executed in an inspirational and relevant way



---

How?...a growth  
mindset









**Johnathan Armstrong** @johnyarmstrong · 10s  
Just seen the new @carling advert during the #6Nations great ad and great to be focusing on Burton On Trent! #carling #burtonontrent #madelocal @MolsonCoors

**Philip Newman-Hall** @PNH\_Hotelier · 59s  
Don't usually like adverts but delighted to see @carling #TalkingUpBritain

**Thomas Lea** @TomYouTwit · 44s  
Great advert @carling supporting my home town of Burton On Trent! How come you aren't the shirt sponsor of @burtonalbionfc ?

**Andy Beadle** @ADB0806 · 1m  
#Carling shout out! Well done for connecting your beer to #britishagriculture

**Jack.O** @TheJackOrton96 · 53 minutes ago  
Followers: 1.5k · Burton-on-Trent  
That new Carling advert 🍻 B-O-T ❤️



**Jake Freestone** @No1FarmerJake · 46s  
Brilliant TV advert for @carling during #ENGvIRE @ITV 100% #British #barley #proudtogrowit 🇬🇧 #BackBritishFarming

**Paddy** @Pads45N · 42s  
Great advert @carling

**Rob Helliwell** Feb 2, 1:40pm  
New @MolsonCoors Carling advert focused on Burton is great 🍻

**Andy Burton** 4 minutes ago  
Brilliant new add... Glad to see a great British company promoting Britain after all the negativity around leaving the EU, I'm gonna share your add far and wide. Well done live your beer love your attitude. # bring on no deal brexit/not scared of the EU  
[Less ...](#)



A group of people are gathered around a table, raising their glasses of beer in a toast. The scene is dimly lit, suggesting an evening setting. The people are smiling and appear to be in a social, celebratory mood. The background is blurred, focusing attention on the group and their toast.

Cheers!