MARKETING COUNCIL
March 2022
LONDON


SAFETY
FIRST

INTERNATIONAL
WOMEN'S DAY 2022

TogetHERness

*When **they** rise, we **all** thrive*


TOGETHERNESS -noun

DAY 1
Consumer Inspired Growth

10:00 - 17:00 pm

(Dentsu offices)

1	09.00- 10.00 am	Breakfast Connect
	10:00- 10:30	Agenda and logistics The Year of Commerce – James/Marta
2	10.30- 12:30 pm	Consumer Inspired Growth Workshop
		Working Lunch
3	13:15- 14.25 pm	Consumer Inspired Growth Workshop
		Coffee break
4	14:40- 15.25 pm	SP briefing - Matteo
5	15.25- 16.00 pm	Moderation - Alison
6	16:00 - 16:45 pm	Beavertown
7	16:45 – 17:00pm	Closing Day 1 – James/All

DAY 2
Our Obsession with Creativity

08.45 - 15:00 pm

(Dentsu offices)

1	9.00-9.45 am	Be Obssesed about the Work – James & Fred Levron (Chief Creative Officer Dentsu)
	09.45-10.00 am	Coffee break
2	10.00-12.00 pm	Shape our future in Creativity Part I – R3 / Marta
		Working Lunch
3	12.45-13.35 pm	Shape our future in Creativity Part II – R3 / Marta
	13.35 - 13.45 pm	Coffee break
4	13.45-14.15 pm	The Future of Retail – Thibault (Epsilon)
5	14.15-14.45 pm	The Future of Le Pub – Bruno Bertelli
6	14.45-15.15 pm	Closing & next Steps– James
	15.15>	Airport/ Other 121 meetings

Our North Star:
Driving the Marketing Transformation agenda to realise Evergreen

HEINEKEN EverGreen 2025

OUR HEINEKEN PURPOSE

We brew the Joy of True Togetherness to inspire a better world

Global Commerce

OUR 2025 AMBITION

Category & consumer	Value market share gain in >60% of weighted OpCo revenues Innovation rate of 8-10%
Brands	Total Brand Power for GC & Strat brands >110
RTC	€10b e-Rev Growing NPS in >60% of weighted OpCo revenues
R&MG	Net rev /hl growth >CPI in >60% of weighted OpCo revenues
CSP	10-15% + ROI on F&V CS EUR 100m ABTL efficiency
People	% women JG35+ >30%, 0 fatalities

OUR VALUES

- **PASSION** for consumers & customers
- **COURAGE** to dream & pioneer
- **CARE** for people & planet
- **ENJOYMENT** of life

OUR DREAM

SHAPE THE FUTURE OF BEER & BEYOND TO WIN THE HEARTS OF CONSUMERS

WHERE TO PLAY

- Drive premiumisation at scale led by Heineken®
- Pioneer choice in Lo/No
- Intentionally expand Beyond Beer
- Build Future-Fit Digital Route to Consumer
- Strengthen in key profit pools through Expansion & Acquisition

HOW TO WIN

DRIVE A CONSUMER-CENTRIC CULTURE
- Increase instant consumer access & embed consumer centricity in the daily reality of our leaders & teams
- Use demand spaces, consumer insights and trends to shape portfolio, brand and innovation management of core beer & beyond
- Deliver fast, incremental, and sustainable demand space based innovation (incl. upweighted delivery of H® 0.0, Silver and innovation beyond lager), with 4-8 'Innovation'

TRANSFORM BRAND-BUILDING
- H® 2x sales by becoming the #1 choice for Gen Y and the most meaningful beer brand
- Premiumise portfolio at scale with fewer, bigger bets (e.g., Birra Moretti, Tiger)
- Rapidly build 1st / 2nd party data arsenal to maintain and accelerate IDDM capability
- Step up creativity and become part of popular culture

EMBED CUSTOMER-CENTRICITY
- Embed customer-centricity in our daily lives
- Revitalise RtC in fragmented trade, digitally-enabled and UCE based
- Build winning Europe e-Horeca platform, led by direct RtM
- Drive customer experience systemically through Data-Driven Sales
- Excellence in e-retail
- Industry standard quality Product Data

DRIVE NET REVENUE PER HL GROWTH
- Step up commercial performance intensity – embed R&MG and value market share
- R&MG to drive net revenue / hl while meeting revenue growth ambition

INTENTIONALLY RE-ALLOCATE COMMERCIAL RESOURCES
- Implement predictive CSP tooling to drive ROI-based resource allocation and deliver EUR 100m ABTL efficiencies
- Step up ABTL investment to drive SOV > SOM on Strategic and Game Changer brands via waste reduction and more productive spend

TEAM OF TEAMS and PEOPLE & CULTURE
- Systematic culture of learning and experimentation, orchestrated to enable scale and agility
- Elevate development and succession planning
- Step change in diversity and inclusivity - % women in JG 35+ in Sales
- Get to zero fatalities (road safety)

BEHAVIOURS

- **DELIVER** Play to win & celebrate success. Deliver the goods
- **SHAPE** Think consumer first. Make courageous moves
- **CONNECT** Champion a culture of belonging. Learn, share & reapply
- **DEVELOP** Have real conversations. Embrace learning & growth

Marketing Council March 2022

BOLD MOVES: HOW TO DO IT

DRIVE A CONSUMER-CENTRIC CULTURE, boosting category and innovation capability and performance

TRANSFORM BRAND-BUILDING to drive superior brand power

Intentionally **RE-ALLOCATE COMMERCIAL RESOURCES** (sits in Cost and Value)

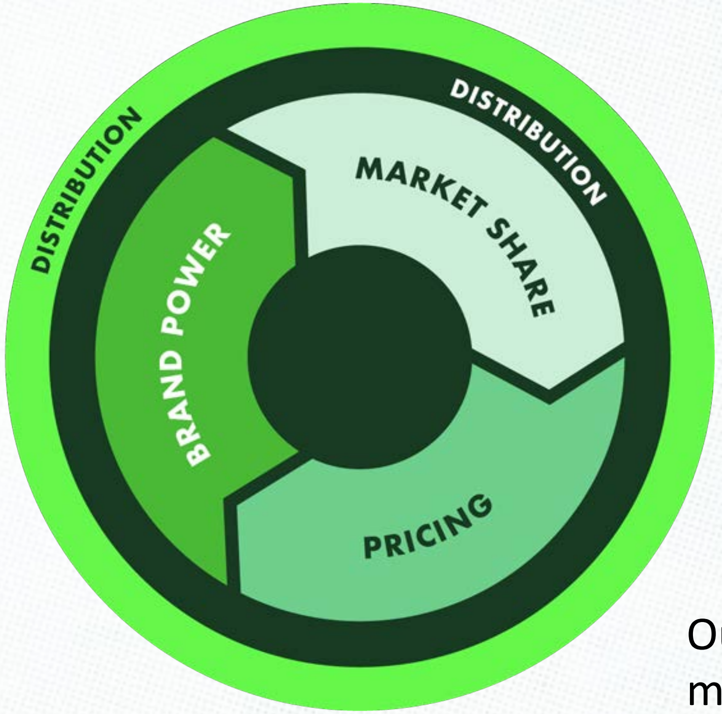
DRIVE NET REVENUE PER HL GROWTH to deliver targeted Gross Margin

EMBED CUSTOMER-CENTRICITY to boost sales, distribution and RTC capabilities and performance

- How to bring to life Consumer Inspired Growth Bold Move
- SP Briefing & Expectations
- Transform Brand Building:
  - Future of Creative Partnerships – Building the optimal ecosystem
  - Moderation as the new normal
  - Beavertown – Building a brand in the modern era

RE-ESTABLISH THE CONNECTION BETWEEN BRAND POWER AND GROWTH

Our brands
are meaningful,
different and
salient



We are winning

Our brands are
more valuable

How

- **SOV > SOM**
- **Data driven commerce**
- **Creativity**
- **ABTL growth**
- **Strategic + Game changer**
- **Integrated Must Win Battles**

POLARIS

Shape the future of beer & beyond

Marketing Council

8 March 2022

HEINEKEN

HEINEKEN EverGreen 2025

Objectives for today

EXCITE
recap our approach to drive consumer-inspired growth

EDUCATE
share our main learnings & insights to date

ACCELERATE
discuss next steps and how Polaris will impact you

10:30-11:00

POLARIS

Introduction

THE DREAM

Shape the future of beer & beyond to win the hearts of consumers

\+

THE ENABLER

Consumer-inspired strategy
(Informed by Polaris)

\>

THE OUTCOME

Winning OpCo portfolios, products & innovation pipelines

HEINEKEN succesfully navigated the SEASONS

Industrial

Revolution

International

Expansion

Mass

Marketing

Global

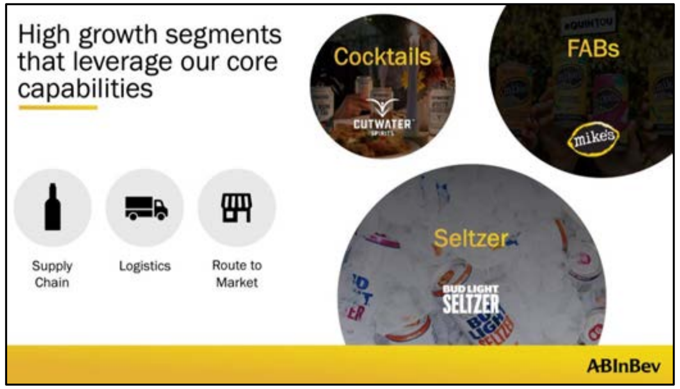
Consolidation

Blurring

Categories

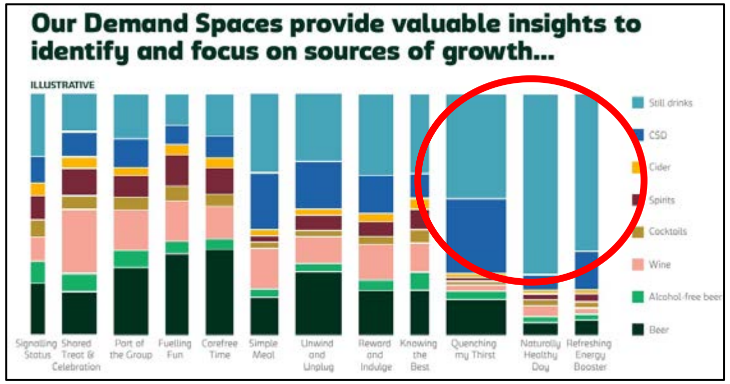
All looking to expand beyond core categories; but with different scope / approach

ABInBev



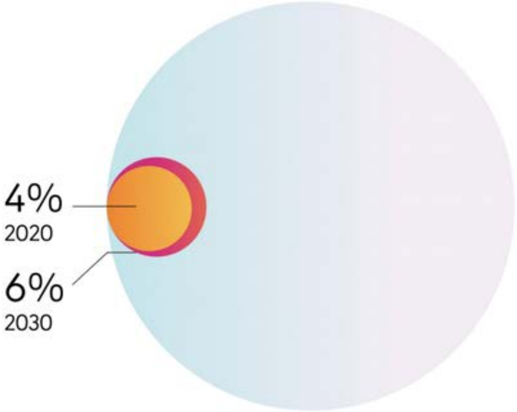
"**Beyond Beer** products tackle perceived beer barriers like bitterness, masculinity, and high carbs"

Carlsberg



"**Win with Brews** in spaces with high non-alcoholic consumption"

DIAGEO



"Our ambition is to deliver a **50% increase in Diageo's share of TBA** by 2030"

OUR DREAM

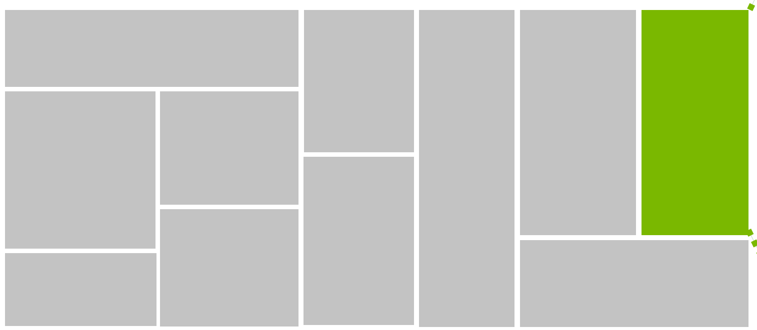
Shape the future of beer & beyond to win the hearts of consumers

We need to evolve our approach

	From knowing BEER …		… to knowing CONSUMERS
Approach	WHAT consumers are drinking	>	WHY consumers are drinking
Scope	Competing in BEER	>	Competing in DEMAND SPACES
Output	LOCAL portfolio strategy	>	LOCAL & GLOBAL portfolio & innovation strategy

Consumer demand mapping to reshape our view of the category

A consumer-centric way of **structuring the market…**



…into **demand spaces** based on consumer understanding

Example

A specific OCCASION context…
- Small group
- Evening
- Weekend

…in which a bundle of NEEDS emerges…
- Connect
- New & trendy
- High quality

…translating into specific CHOICES
- Brand A
- Brand B
- Brand C

WINNING in a demand space depends on meeting the FULL SET OF NEEDS

Demand is highly diverse within …

50K+ Consumers surveyed

60 Needs analyzed

75+ Contextual variables

100+ Category & brand perceptions

… but largely common across markets

Needs driven by two main dimensions

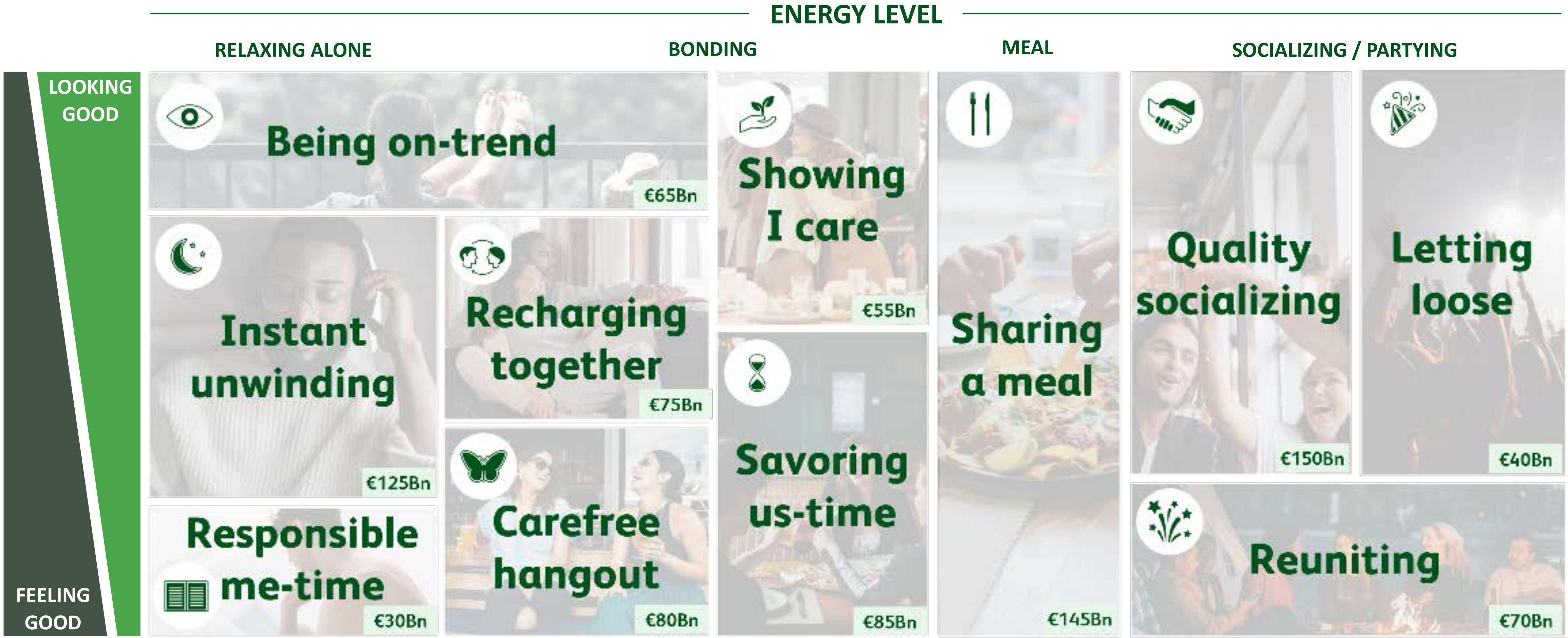
Low
ENERGY

High
ENERGY

FEELING
good

LOOKING
good

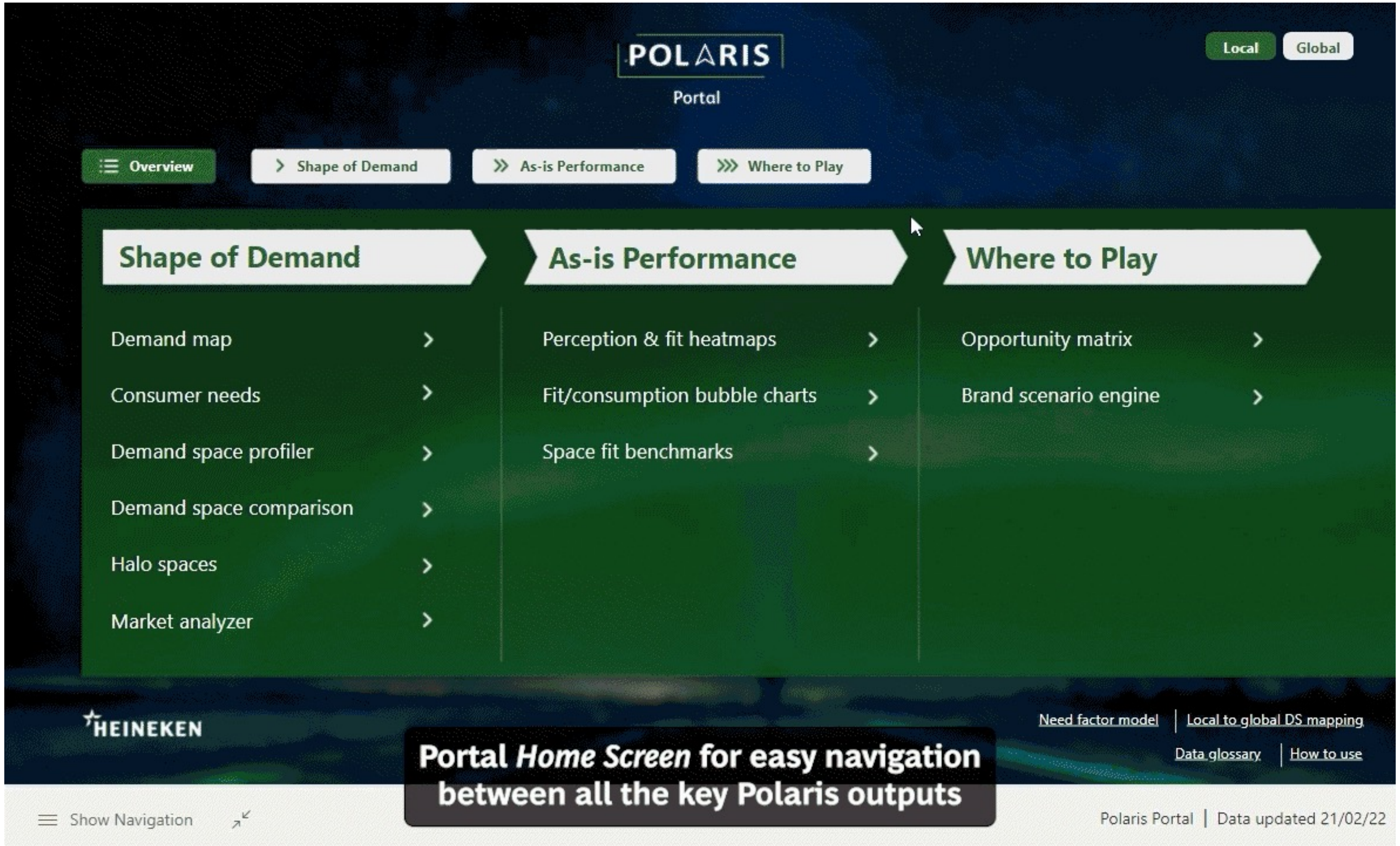
Global demand map consists of 11 demand spaces



€Bn Retail sales value

Power BI

Short demo of Polaris Power-BI Portal



[Polaris Portal - Demo video - Feb 2022.mp4]

3

demand space fundamentals based on extensive analyses

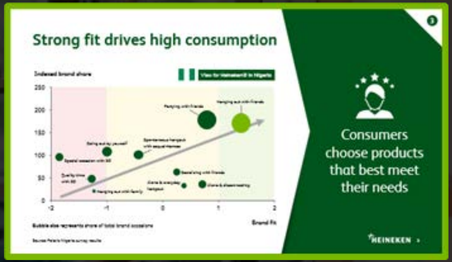
1

Demand is diverse across consumers and occasions

2

Brands can **only stand for a few things** in consumers' minds

3



Consumers choose **products that best meet their needs** and are affordable & available

Fundamentals…

1. **Demand is diverse** across consumers and occasions

2. Brands can **only stand for a few things** in consumers' minds

3. Consumers choose **products that best meet their needs**, are affordable, and are available

…translate to 4 key principles

Available brands that effectively meet needs in a demand space will take share from brands that don't

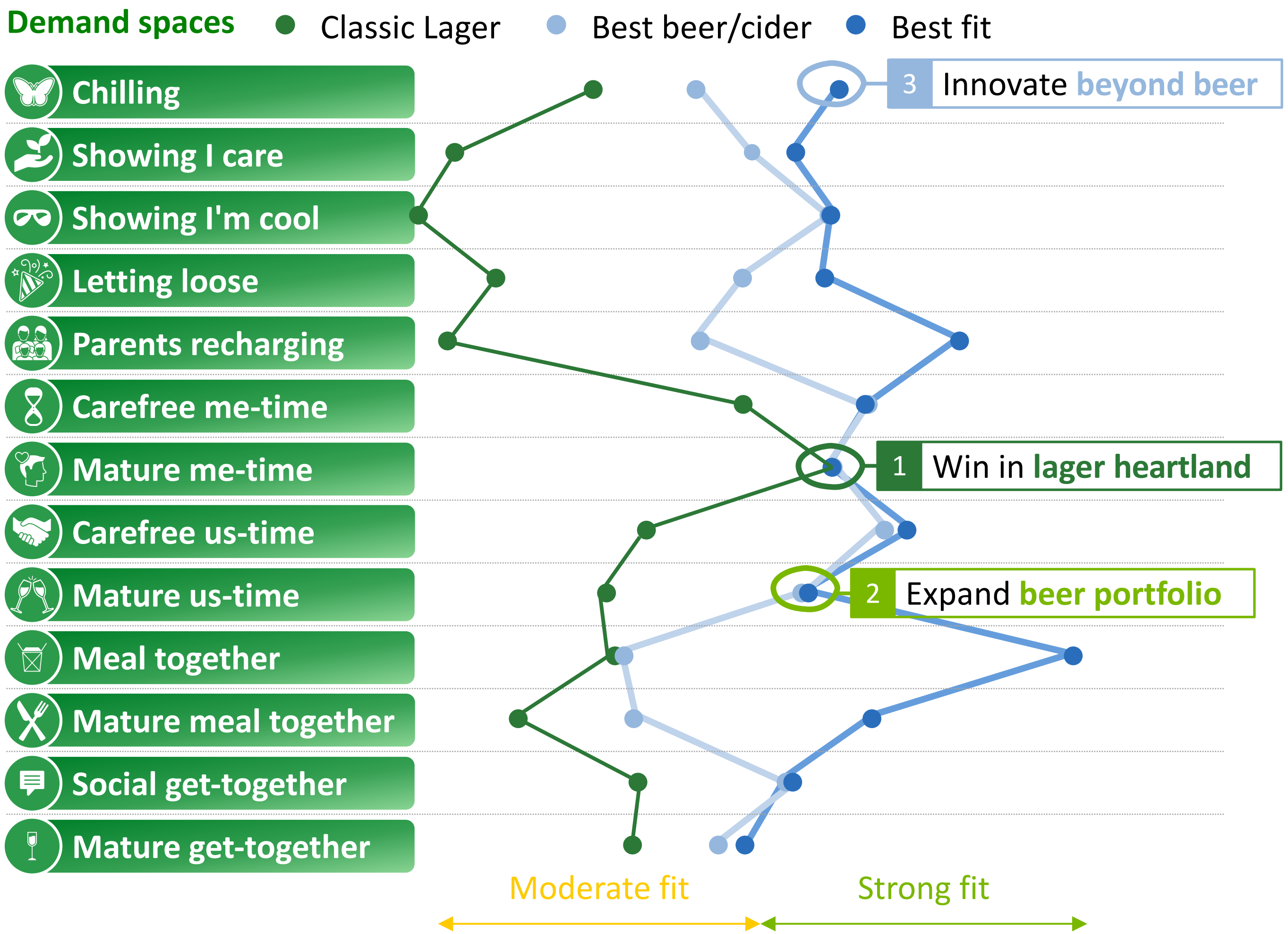
Brands that **are good in multiple spaces, but great in none**, will lose to different competitors everywhere

To **maximize coverage & minimize complexity**, different brands should focus on winning in different spaces

Line extensions that are consistent with delivering needs fall under mother brand, while **extensions that satisfy distinct needs** should operate as distinct brand

UK Example

Classic lager is vulnerable; a moderate fit for many spaces, but only great for few



1. Based on apple cider perception Source: UK survey results

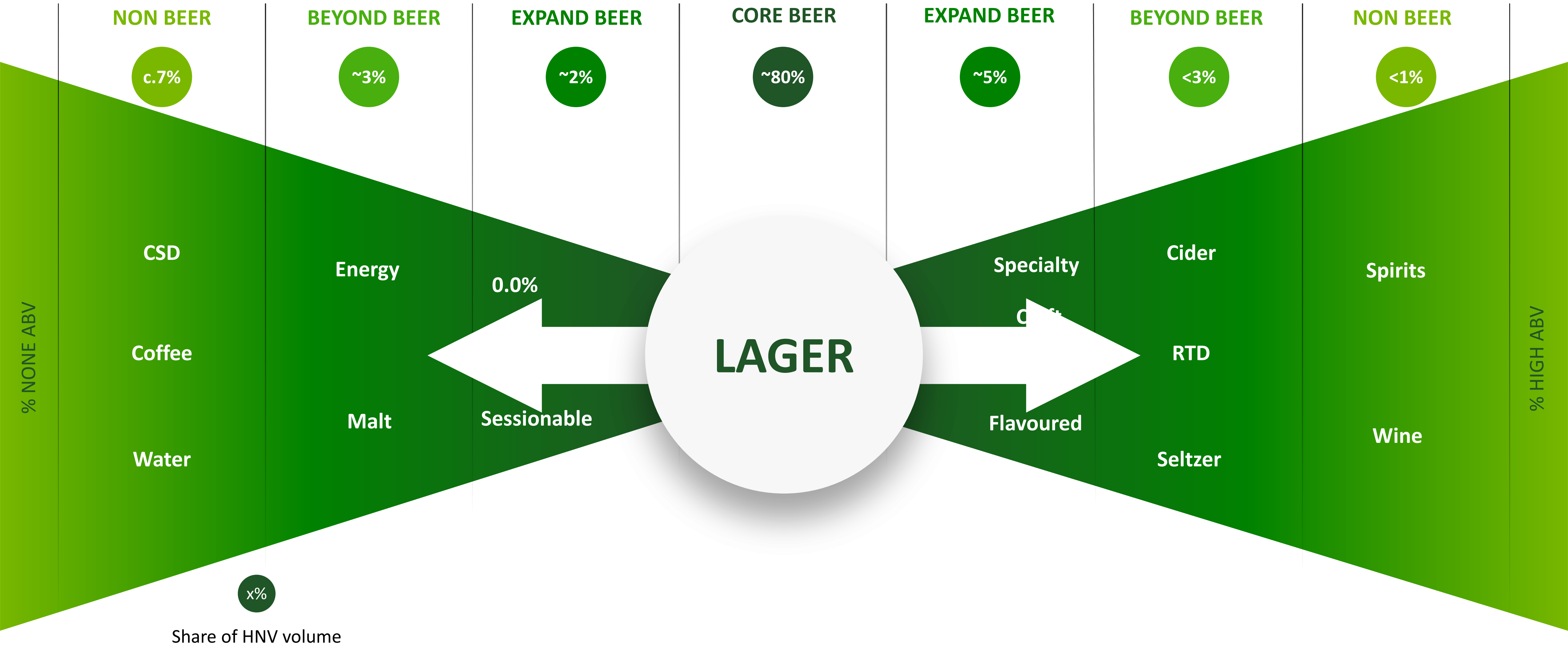
We need to reshape the category in three ways

1 Add focus & differentiation to core **LAGER** propositions

2 Expand **BEERS & FLAVORS** portfolio to cover a broader range of needs

3 Go **BEYOND BEER** to address white spaces

Winning in beer & expanding our scope



Distinct actions to transform our portfolio for growth

Separate propositions to target distinct demand spaces

Higher incrementality
Less internal competition

Focus proposition against needs of each demand space

Higher effectiveness
Better external competitiveness

Innovate to target unmet needs via growth platforms

Reshaping the category
Expanding beyond

Accelerating innovation rate to address unmet needs

5%
2018-2019

10%
2025

€2-3B
Innovation revenue

Jointly deliver on our Dream

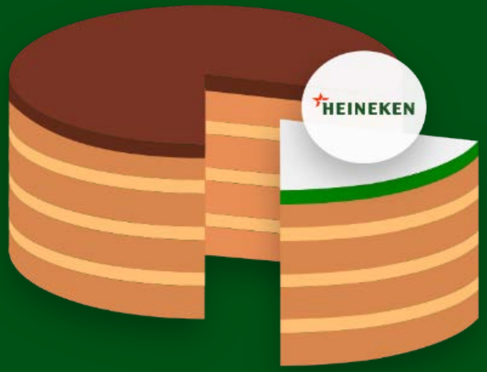
Shaping the **FUTURE OF OUR CATEGORY** will mean different things for different OpCos—but always about growing the pie

Dynamic times but many **OPPORTUNITIES** in large parts of the beer category—let alone in total alcohol occasion

We can refine and, in some cases, simplify **PORTFOLIOS**—we can do a lot in **PRODUCT** to fulfill a broader set of needs & occasions

Polaris will help identify common insights and opportunities to drive **more SCALABLE & BLOCKBUSTER** propositions & innovations

Being open to Beyond Beer means we are freeing-up **CREATIVE MINDSET** to address consumer demand in new ways



11:00-11:15

Polaris in Mexico

Polaris revealing learning

A significant portion of HMEX volume is vulnerable to cede share due to lack of fit with the Demand Spaces

Brands that do not fully meet consumer needs in a DS, have risk of losing volume to other brands and categories

~50% of HMEX volume at risk of ceding market share

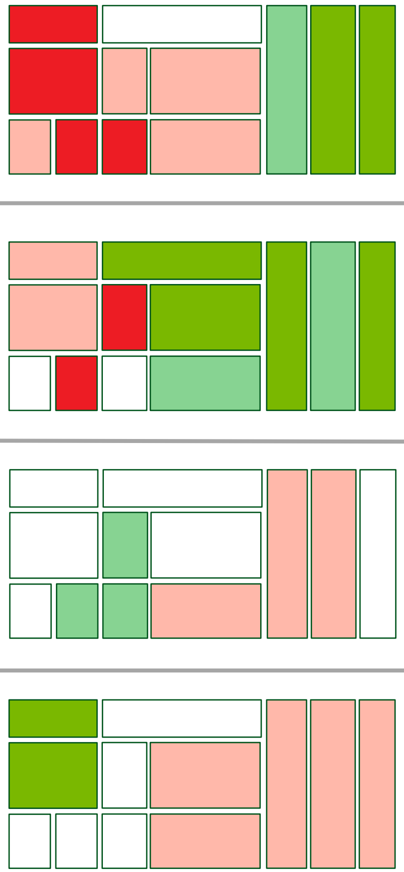
NEEDS FULFILLMENT HEAT MAP

How well the brand fulfills DS needs

Brand fit with DS

VULNERABLE VOLUME

% Brand vol. in low fit spaces



Tecate Light: ~65%

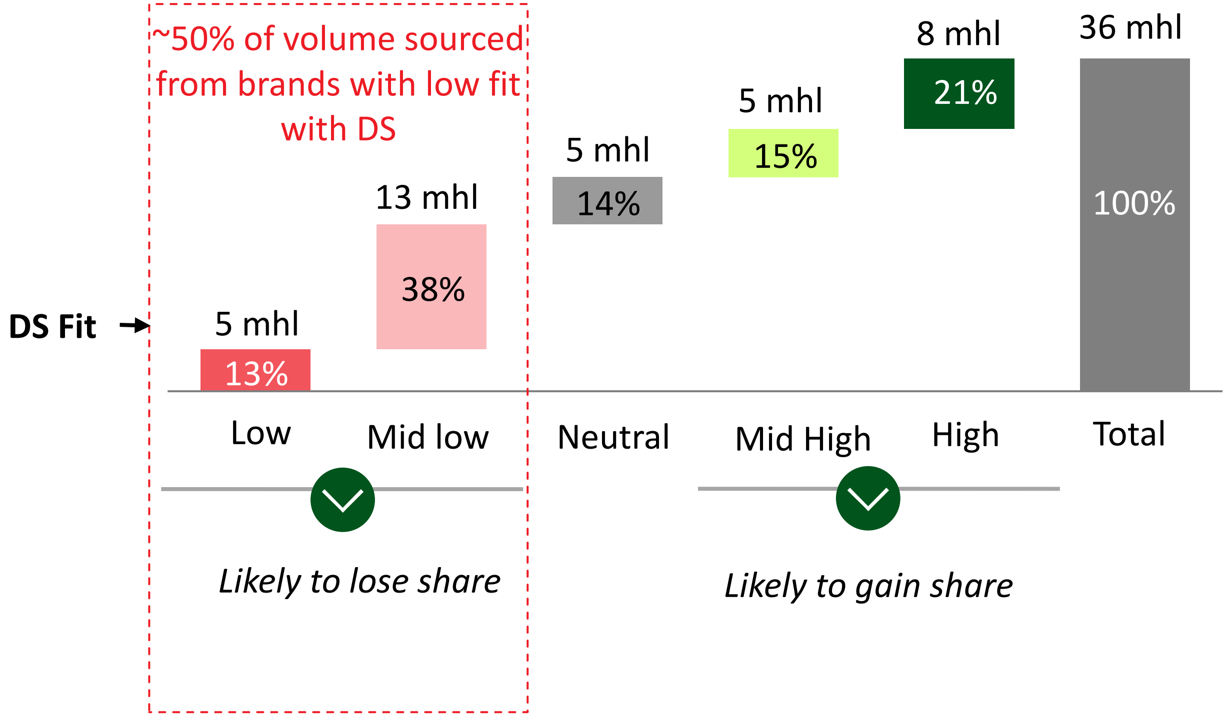
Tecate Original: ~30%

Dos Equis: ~55%

Heineken: ~55%

Brand fit with DS High · Mid high · Neutral · Mid low · Low

HMEX 2019 VOLUME BREAKDOWN BY DS FIT (MHL)



Source: Heineken DCG MX survey 2021, BCG analysis

Optimising our Portfolio Play

1 **Brand allocation based on fit** for a better-balanced portfolio

2 **Mindset shift**: from “Brand enemies” to a consumer need fulfilment view

3 **Prioritizing Innovation** and resource allocation to win consumer demand

Increase HMEX **right-to-win**, and capture **incremental demand**

1 A better-balanced portfolio allocation, to strengthen brand fit

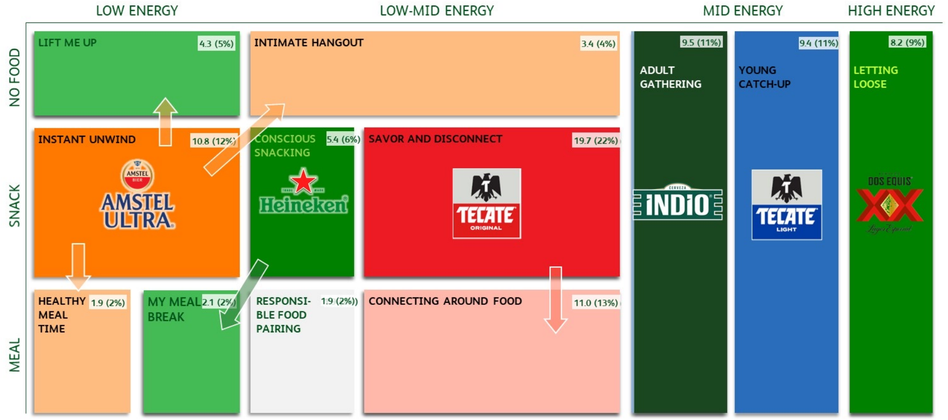
From …

15+ brands focused on 3 spaces that cover **31%** of demand

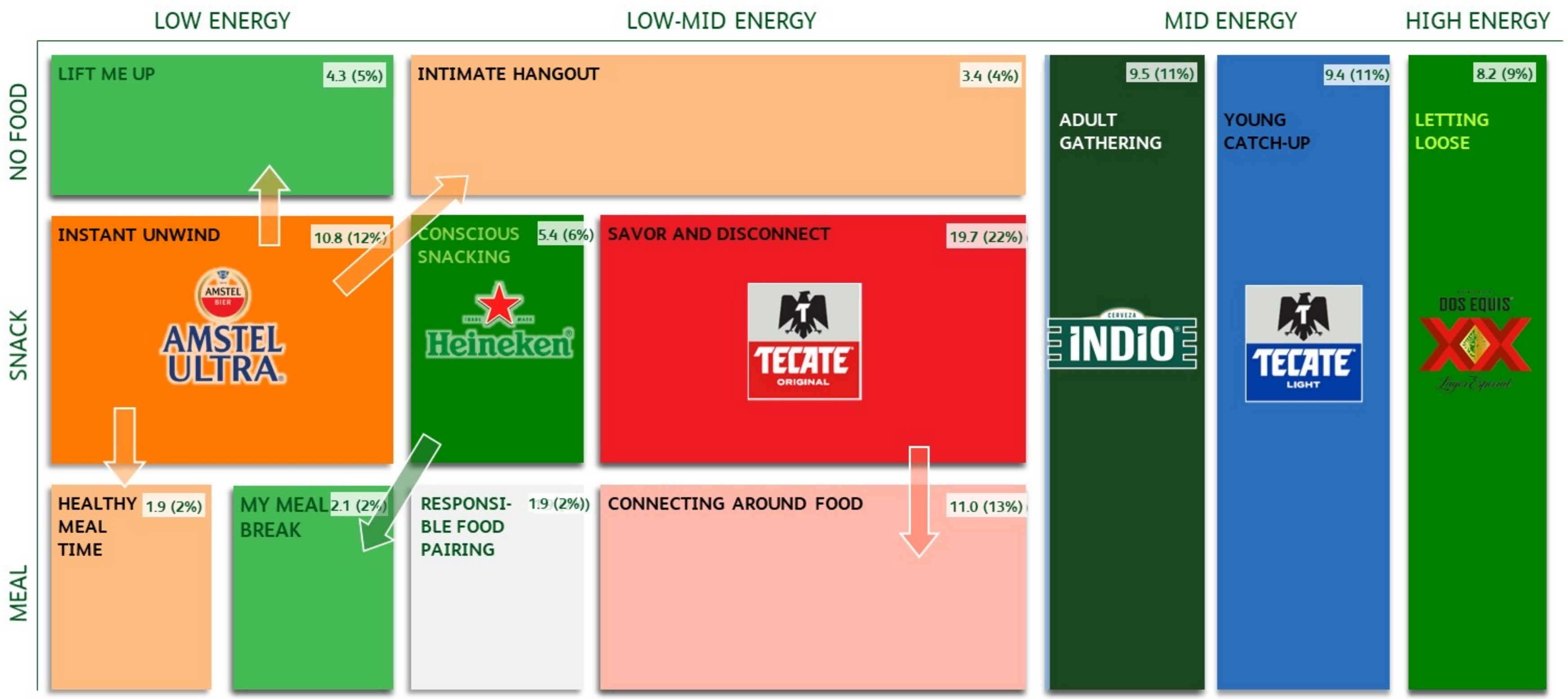
Brands	Market share %	Volume (Mhl)	Lift me up	Instant unwind	My meal break	Healthy mealtime	Intimate hangout	Savor and disconnect	Conscious snacking	Connecting around food	Responsible food pairing	Adult gathering	Young catch-up	Letting loose
Volume (Mhl)			4.3	10.8	2.1	1.9	3.4	19.7	5.4	11.0	1.9	9.5	9.4	8.2
Tecate Light	18%	16.3	2%	11%	1%	0%	6%	30%	4%	15%	3%	14%	7%	6%
Tecate Original	6%	5.0	7%	13%	0%	0%	11%	25%	5%	6%	4%	5%	10%	13%
Dos Equis Lager	4%	3.8	5%	5%	1%	0%	1%	15%	1%	30%	2%	11%	12%	17%
Indio	3%	2.8	6%	13%	2%	1%	4%	28%	7%	11%	1%	7%	6%	14%
Carta Blanca	2%	1.8	4%	5%	7%	6%	3%	29%	1%	17%	4%	6%	6%	11%
Superior	2%	1.3	4%	16%	5%	0%	2%	19%	1%	16%	1%	7%	11%	16%
Sol	1%	1.1	2%	9%	1%	1%	12%	15%	7%	9%	2%	19%	11%	13%
Coors Light	1%	0.8	2%	7%	3%	0%	5%	23%	7%	11%	2%	5%	14%	20%
Amstel Ultra	1%	0.6	7%	4%	1%	1%	3%	17%	10%	11%	1%	14%	23%	7%
Heineken	1%	0.6	5%	11%	6%	10%	3%	10%	4%	19%	8%	11%	9%	5%
Sol Clamato	1%	0.5	2%	7%	1%	0%	2%	22%	6%	12%	1%	13%	12%	22%
Miller Lite	1%	0.5	4%	3%	19%	0%	0%	43%	0%	2%	2%	0%	0%	29%
Miller High Life	<1%	0.3	0%	2%	1%	3%	4%	18%	3%	7%	2%	11%	22%	28%
Bohemia	<1%	0.3	3%	7%	3%	2%	2%	15%	6%	18%	2%	8%	13%	21%
Dos Equis Ambar	<1%	0.3	1%	6%	5%	0%	3%	12%	9%	15%	2%	10%	19%	16%
Sol Michelada	<1%	0.06	2%	11%	1%	1%	4%	12%	6%	18%	8%	11%	16%	10%
Heineken 0.0	<1%	0.05	2%	16%	4%	3%	7%	11%	15%	3%	1%	20%	14%	4%

To…

6 focused power brands that cover **96%** of demand …



1 In the new portfolio, 6 distinct & focused brands maximize coverage of demand



Six power brands cover 96% of the market
of which 71% directly and 25% via halos

x.x (%) Demand Space Beer volume (Mhl & %)

Arrows point to DS halo spaces (non-exhaustive)

Halo effects non-exhaustive

** To be confirmed with Central Heineken® team
Note: 2019 figures
Source: Heineken DCG MX survey 2021, BCG analysis

2 From 'Brand Enemies' to 'Needs Fulfilment': optimising portfolio

Tecate Ambar was launched in 2019 to compete head to head with Victoria Ambar in Challenger Regions

Victoria vs Tecate Ambar

- **Brew** ✓
- **ND/WD** ✓
- **Price** ✓
- **AOS** ✓

13.5 mhl

0.2 mhl
-20% vs '20

Victoria vs Tecate Ambar

KEY DEMAND SPACE VICTORIA VOL	BRAND VOL SHARE | FIT IN DS	HMEX BRAND FIT IN DS
Savor and disconnect	28%	Tecate Original
Adult gathering	18%	Indio
Connecting around food	11%	Tecate Original

Delisting WIP (Tecate Ambar)

...to FOCUS on the winners

Tecate Original: **5** mhl
+13% vs '20

Indio: **2.5** mhl
+12% vs '20

3 Strengthening fit & expanding demand through Innovation

POLARIS – DEMAND MAP

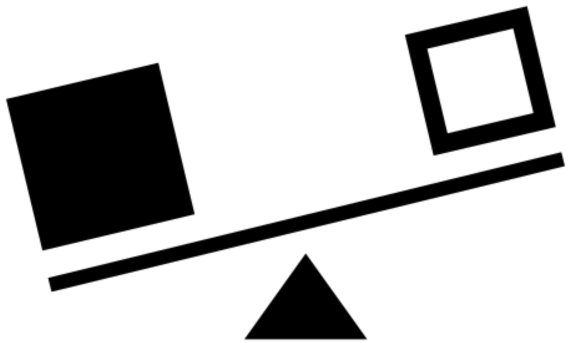
	LOW ENERGY		LOW-MID ENERGY	
NO FOOD	LIFT ME UP		INTIMATE HANGOUT	
SNACK	INSTANT UNWINDING		CONSCIOUS SNACKING	**SAVOR AND DISCONNECT** A shared moment in company of close ones to disconnect from routine and ready to enjoy a nice snack and a good drink
MEAL	MY HEALTHY MEAL	MY MEAL BREAK	RESPONSIBLE FOOD PAIRING	CONNECTING AROUND FOOD

SEGMENT NEEDS

TECATE ORIGINAL
SAVOR & DISCONNECT
Celebration ●
Disconnect ○
Great Taste ○
Feeling Good ●

- ✓ Expand Tecate presence in Snacking, as the major activity to '**DISCONNECT**' from duties in Mexico
- ✓ Credentialise Tecate **TASTE** with a great 0.0 brew and build association with Mexican snacks
- ✓ Be an alternative/capture CSDs consumption (the most often used beverage for snacking)

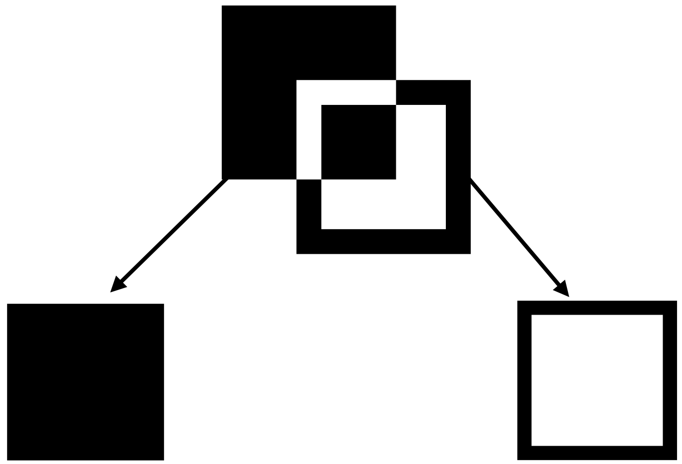
Polaris-guided portfolio optimization enables growth



Corrects overcrowding in high energy spaces

- Re-balancing of portfolio allows for pin-pointed coverage with brands with higher right to win

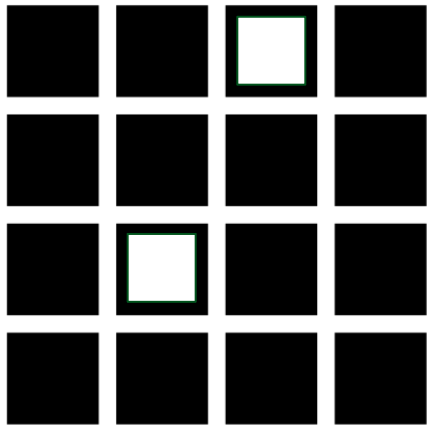
Higher incrementality
Less internal competition



Focus proposition against DS specifics

- Each brand with clear path ahead
- Target communication, innovation & activation to space needs
- Limit internal competition

Higher effectiveness
Better external competitiveness



Innovate new propositions to target unmet needs via expansive growth platforms

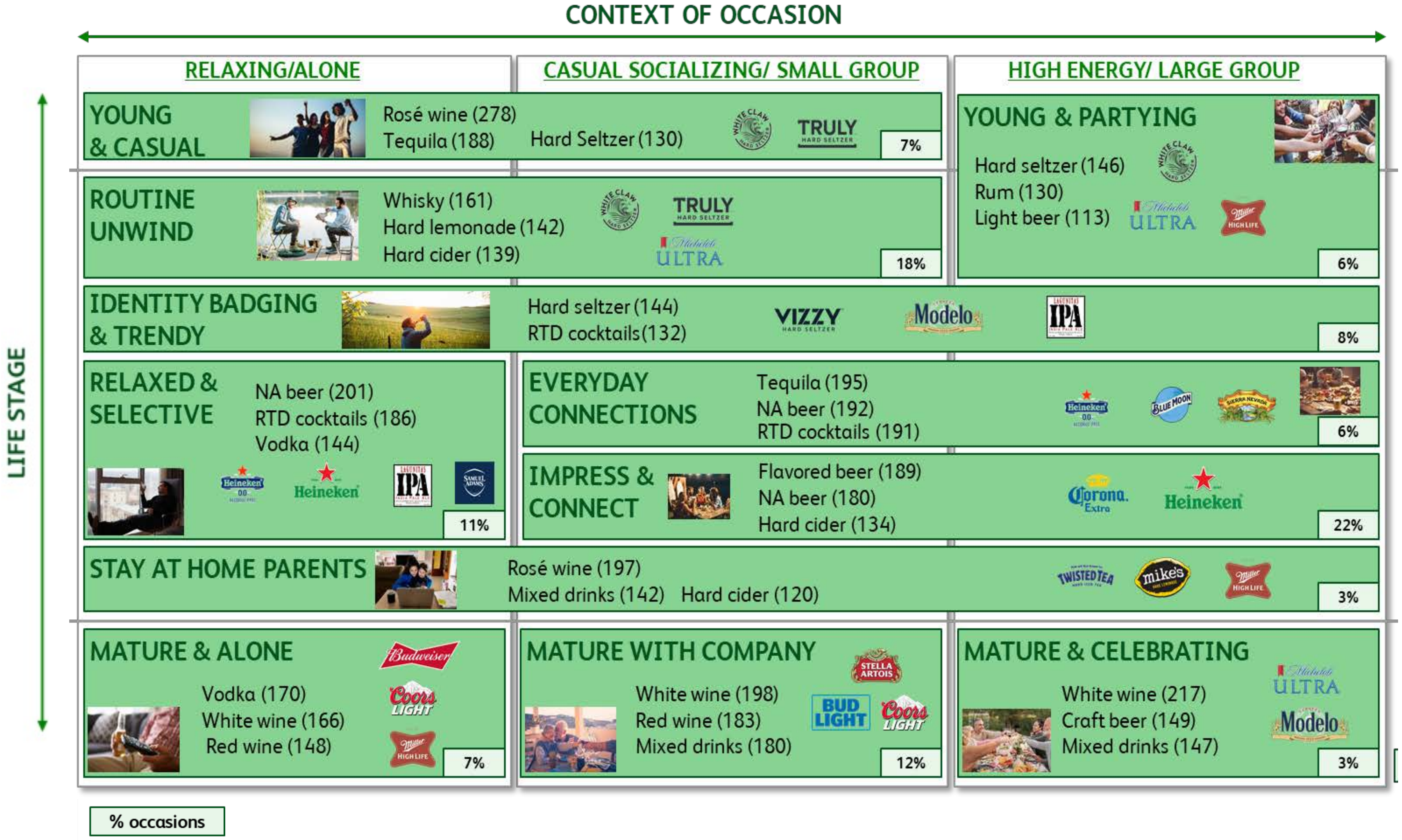
- Identification of spaces with unmet needs
- Innovate full proposition to beat competitors' weaknesses

Reshaping of the category
Expanding beyond

11:15-11:30

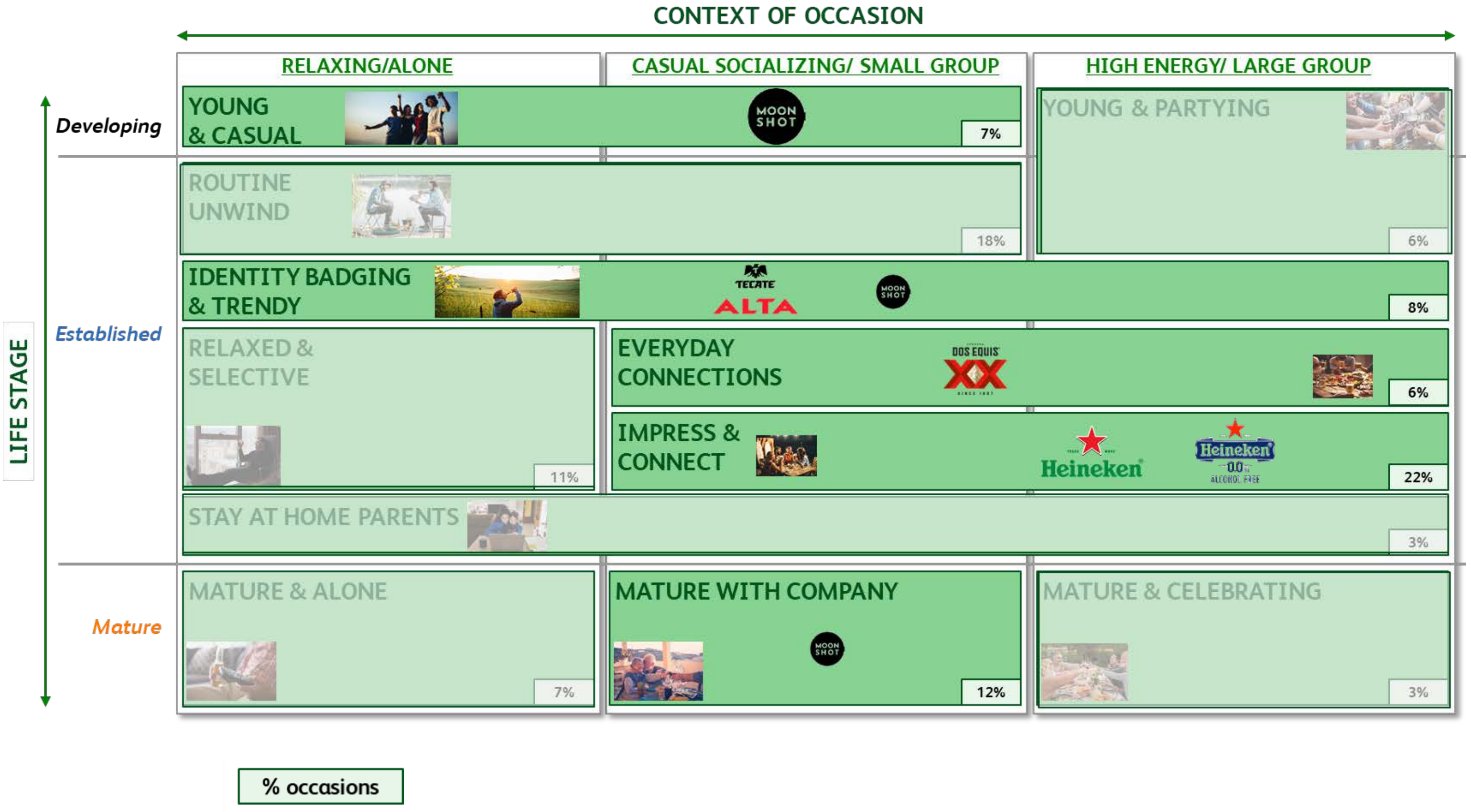
Polaris in US

Polaris identified 11 Alc. Bev. Demand Spaces in the US, determined first by life stage and occasion's context.



Source: BCG Research 2021, Needspaces Tracker H1 21

We clearly identified discreet demand spaces for HUSA Portfolio.



WHERE TO PLAY

Strengthen Heineken® in 'Impress & Connect, the largest space, as an elevated brand winning on quality & reputation.

Better distinguish Dos Equis from Heineken® and win in 'Everyday Connections' as the accessible everyday brand built around connection.
Strengthen the brand accessibility perception ('for everyone') and 'fun'.

Accelerate Tecate transformation by positioning Tecate Alta as "hero" brand in 'Identity Badging & Trendy'.
Take advantage of the product sessionability and Tecate brand authenticity to play in a younger space.

Prioritize Innovation on three "white spaces" for further exploration with 'Young & Casual' as priority #1.

Source: BCG Research 2021

How to Win in Identity-Badging & Trendy, a unique US Demand Space

”I want to be on trend and do (or be seen as) doing the right thing for me and others.”

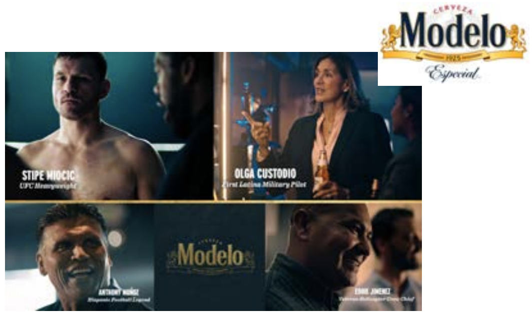
How To Win

Positioning

- Convey a brand that is **On-Trend** to help consumers be seen as “in-the-know”
- Land a clear **brand purpose and point of view** tied to sustainability or another relevant social cause
- Tap into **origin story or provenance** to authentically reinforce reason to be/cause

Product

- Offer a product with elements that are **“better for you”** to help consumers feel they are making a **healthier choice**
- Offer a product that allows them to **feel physically well** in the moment



Rooted in cause of immigrant experience

Rooted in cause of patriotism (expanding to diversity + sustainability)

Differentiated HS doffer with low cals and added physical benefits

https://www.pearlfisher.com/work/tecate-alta/

How to Win in Young & Casual with Moonshot

"I want to let loose and stand out with something new. I need an easy to drink alc. beverage without too much calories/sugar."

HOW TO WIN

Product

- **Easy-to-drink** taste profile with a **sweeter flavor**
- Real **H&W credentials**, specifically around **"helping to lose weight"** (e.g., low carb, low sugar)
- **Newness and differentiation** from mainstream products (e.g., traditional hard seltzers, light beers) – could be category, flavor, ingredients, format, etc.
- **Beautiful packaging** that helps the consumer stand out

Positioning

- A brand for **letting loose** – *feels like transitioning from work to 'weekend mode' on a Friday night*
- **Trendy and casual** – Stylish and cool during low/med energy moments (not partying)

Source: BCG Research 2021

A peek into what is beyond…

11:30-11:45

Jonnie Cahill

Michael Gillane

Dario Tarulla

Emmanuel Oriakhi

Panel with 2021 markets

Back at 12:00

12:00-12:30

Our Global brands

EST. 1873

Heineken®

QUALITY SOCIALIZING

BRAM WESTENBRINK

HEINEKEN® ANCHORED IN QUALITY SOCIALIZING

HEARTLAND OF ALC. OCCASIONS, UNIVERSALLY IN ALL MARKETS

ENERGY LEVEL

LOOKING GOOD

FEELING GOOD

RELAXING ALONE

Being on-trend (6%)
Looking good
Physical benefit*
Prevents bloating*
Discovery*

Instant unwinding (11%)
Having me-time
Looking good
Letting loose
Effective & efficient*
Thirst quenching*

Responsible me-time (3%)
Having me-time
Being responsible
Disconnecting
Great taste*
Thirst quenching*

BONDING

Recharging together (7%)
Looking good
Being romantic
Energizing
Physical benefit*

Carefree hangout (7%)
Feeling good
Energizing
Lifting my spirits

Showing I care (5%)
Looking good
Connecting
Doing the right thing
Physical benefit*
Discovery*

Savoring us-time (8%)
Feeling good
Thinking about others
Great taste*

MEAL

Sharing a meal (14%)
Connecting
Feeling good
Food pairing*
For everyone*

SOCIALIZING / PARTYING

Quality socializing (13%)
Connecting
Looking good
Physical benefit*
Discovery*
Quality & reputation*

1

Letting loose (12%)
Connecting
Celebrating
Letting loose
Prevents bloating*
For everyone*

Reuniting (7%)
Connecting
Feeling good
Celebrating
Great taste*

H® EXPLORING NEEDS AND TENSIONS IN QUALITY SOCIALIZING

- *Connecting*
- *Looking good*

- *Physical benefit*
- *Discovery*
- *Quality & reputation*

Premium beer ideal to facilitate the connections

Established choices twisted with trendy discovery to elevate Looking good

QUALITY SOCIALIZING X HEINEKEN®

Fits Positioning

Relevant for Consumers across the globe

Future-focused

QUALITY SOCIALIZING FITS H® POSITIONING

Heineken®

HEINEKEN® BRAND IN THE BOTTLE X QS NEEDS

QUALITY SOCIALIZING NEEDS

Heineken BIAB

LOOKING GOOD & HIGH QUALITY

Premium quality that refreshes me inside out and signals I am open to enjoy fresh thinking and diverse connections (Benefit)

CONNECTING

Heineken exists to spark connections beyond barriers (Purpose)

DISCOVERY

Heineken surprises you with refreshing views and elevated experiences to keep your mind open (Role)

FITS CURRENT EQUITY

BASED ON CONSUMER PERCEPTIONS

Quality & reputation

QUALITY SOCIALIZING SHARES NEEDS WITH OTHER YOUNG ADULT SPACES

FUTURE FOCUSED

Source significant volume in younger adult spaces due to shared needs
Connecting, Looking good, Physical benefit & Discovery

LEVERAGE EXPERIANCE TO BE RELEVANT FOR GENZY

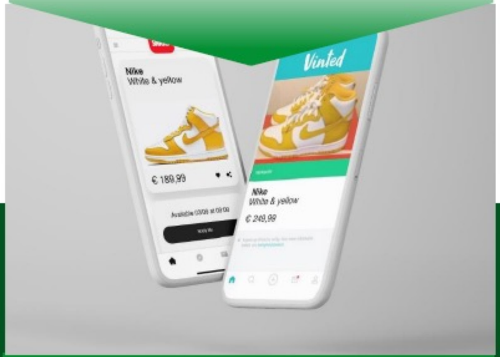
What consumers are willing to pay 15% more for

RELEVANT TO GENERATIONS **X, Y, Z**

QUALITY TIME

EXPERIENCE

PRE-REQUISITE FOR **GEN Y**



CO-CREATION
for a better WE as a result

PRE-REQUISITE FOR **GEN Z**

INNOVATION TO STRENGTHEN MOTHER BRAND ANCHORING

Heineken®

Opportunity for meaningful <u>innovations</u> in line with positioning as **social, quality brand**

<u>Complement</u> H® classic lager with a wide array of taste profiles and physical benefits, incl. Silver & 0.0

KEY TAKE-AWAYS

HEINEKEN®

BRAND ANCHOR

Global anchor in Quality Socializing should be reflected in all markets and brought to life in the relevant contemporary local context

INNOVATION

Anchored in Quality Socializing, strenghtening the relevant needs and nurturing under-indexed

Letting loose

Main characteristics

Consumers partying with friends

Winning propositions are **easy-to-drink, with fruity & light taste** profiles (e.g. RTD's)

Needs (why)

Emotional	Functional
Connecting	Prevents bloating*
Celebrating	For everyone (appeals to everyone)*
Letting loose	

Demographics (who)

Gender: Male (50%) Female (49%)

Age: ≤34 (75%) 35-54 (24%)

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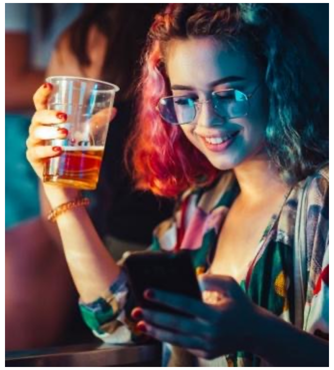
Demand space size[1] 11%

I'm **socializing and partying** with a group of friends.

When partying with friends I just want to **let loose** and don't think of anything else

I want something that I can **drink a lot** of **without feeling bloated** during the party.



I want **to have fun & celebrate**

Example occasions illustrating Letting loose

				
Who	30-year-old-male	25-year-old female	22-year-old male	28-year-old female
Occasion	Celebrating my best friend's birthday at the bar on Friday evening	Going out to the club with a group of friends on Saturday night	Socializing at home with three friends on Thursday night	Going to the bar with friends on Saturday night
Consideration	*When I am celebrating my best friend's birthday, I really want to have a good time and share memories with them. I prefer drinks that are not too expensive and can be shared*	*All I want is just to let loose and forget about everything. I often get the same drinks for everyone, which is the most convenient when we are in the club*	*Every weekday night when I am with firends, we sit on the couch and drink, talk and play some games. During those moments I want something that can be shared, and is not harmful for my physical health*	*When I am partying with my friends in the bar, we really want to have fun and dance. I want something I can keep drinking all night, but doesn't make me bloat*

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Lead *Letting loose* with Desperados

Own demand space with intentional investment in Desperados and extending portfolio into unmet needs

Drive meaningful differentiation DESPERADOS & deliver on key needs:

- Connecting with others
- Remembering & Celebrating
- Letting Loose
- For Everyone
- Prevents bloating with ASW

How to deliver against needs with DESPERADOS

1. **POSITIONING**: build on high energy party roots and dial up Celebration & Connection, with campaign that "invites our tribe to taste the unexpected"
2. **INNOVATION**: drive incremental growth by fulfilling functional needs:
   - **For everyone:**
     - Expand **Virgin 0.0%**; mood modifiers and flavors
     - Refresh **ABV extensions**; new flavors and more sessionable recipes
     - Explore **RTD's**; for easy taste and mixer occasions
   - **Prevent bloating**; launch ASW to drive seltzer benefits
3. **DISTRIBUTION**: unlock On-Trade to drive Brand Presence and Brand Power

To fully unlock Letting Loose potential we need to launch DESPERADOS in more markets and boost where it is present

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Innovation to fulfill *Letting loose* needs with DESPERADOS

PREVENT BLOATING with introduction of ALCOHOLIC SPARKLING WATER

NETHERLANDS 2022
- Lime in 2022 with 8 kHL
- 90% distribution in AH & Jumbo
- 25% of total DSP media
- Flavor expansion in 2023

France 2023
- Launching 3 flavors

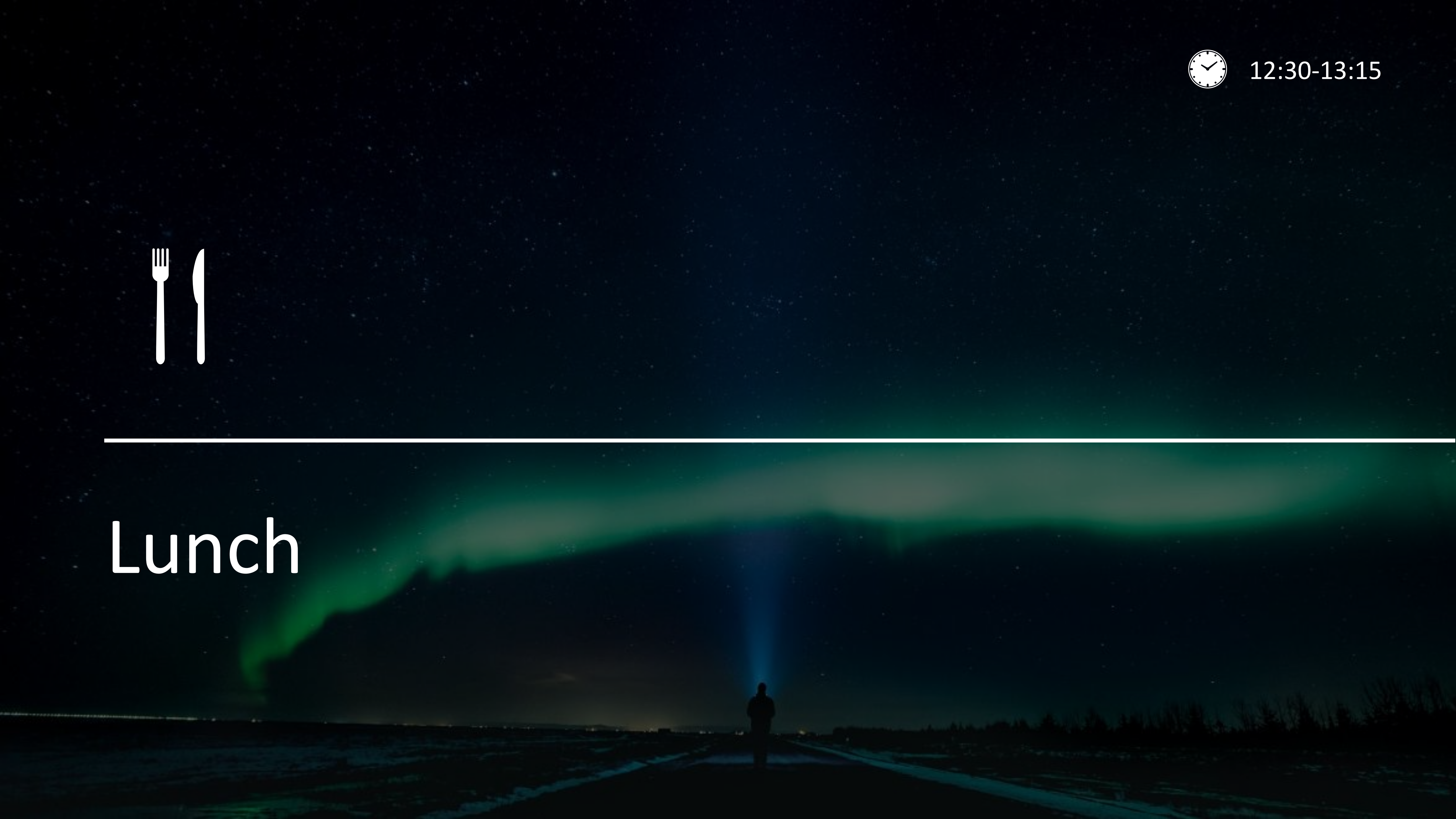
FOR EVERYONE with development of VIRGIN WITH A KICK

WIP

Letting loose

BUZZ WITHOUT THE BOOSE

DESPERADOS virgin line extensions, Nootropics/Adaptogens CBD/THC



12:30-13:15

Lunch

13:15-13:35

Innovation

Deliverables can be found on the Innovation Portal: https://tinyurl.com/2kmay38w

Innovation | Building Blocks

Innovation Platforms	Innovation Ambition	✓ **Created top-down innovation ambition** incl. quantified targets for innovation-revenue & innovation-rate
	Innovation Domains	✓ **Identified growth platforms** based on whitespace opportunity & HEINEKEN right-to-win
	Innovation Governance	✓ **Aligned on cascading logic** for innovation portfolio governance
	Performance Mgmt.	✓ **Approved innovation rate & leading KPI's** started implementation
	Org and Ecosystems	✓ **Aligned on operating model principles** working through further optimisation
	Talent and Culture	✓ **Identified interventions to drive soft side of change** change management planned for phase 2
	Idea-to-Market Fit	✓ **Structured approach on W2P & H2W** democratized access to demand spaces planned for phase 2
Practices	Projects	✓ **Proposed innovation cockpit** started development & integration with SP/AP
	Funnel	✓ **Created overview of pipeline & innovation plans** started development of global pipeline
	Portfolio	✓ **Segmented innovation efforts** Aligned on view of innovation mix

What we're asking OpCo's to do

ACT GLOCAL
Start using the funnel app: submit your funnel & actively look to collaborate with another market and/ or copy with pride

AMBITION
Start developing your OpCo innovation ambition.

FUNNEL
Start managing your funnel as a portfolio: get familiar with segmentation matrix by plotting your funnel on it, make estimates of the net incrementality of all the projects in your funnel

KPIs
Start tracking the revenue coming from new brands & Line Extensions 3 years back

CONSUMER FOCUS
Review your innovation funnel & front-end – always starting from unmet consumer needs, even if you don't have a demand map yet

We are stepping up our **INNOVATION RATE** to address unmet needs, reshape the category, and deliver EverGreen

5%
2018-2019

10%
2025

€2-3B
Innovation revenue every year

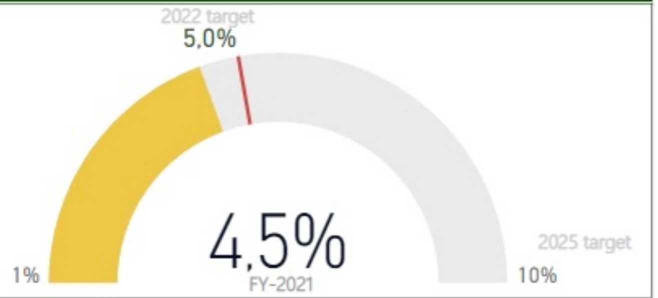
Note: current innovation rate based on brand/line extension innovation (3 years post-launch)
Source: CIL

How are we doing currently? | Innovation Cockpit – Live Dashboard

PROGRESS TOWARDS AMBITION

60% of funnel projects missing forecast

INNOVATION RATE

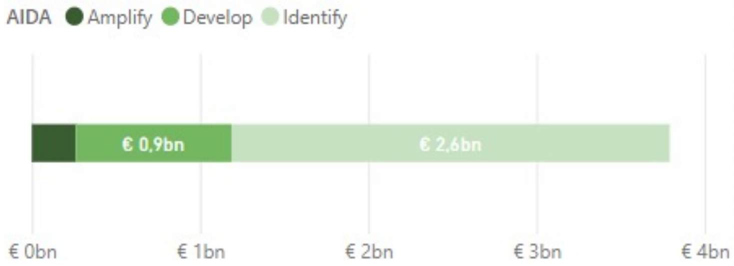


INNOVATION REVENUE

€ 840M

FY2021

FUNNEL VALUE (Revenue FC 2022-2025)



SPEED & SCALE

AVG. REVENUE PER INNOVATION (TOP 25 INNOVATIONS)

€16,5M

FY 2021 TOP 25 INNOVATIONS

AVG. # OF INNOVATIONS BY MARKET

10

LAUNCHED 2019-2021

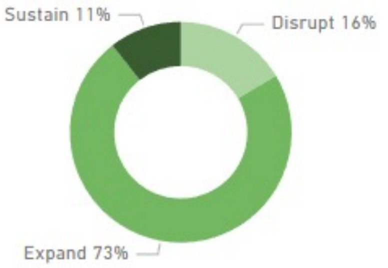
AVG. TIME TO MARKET (LAUNCHED)

WIP

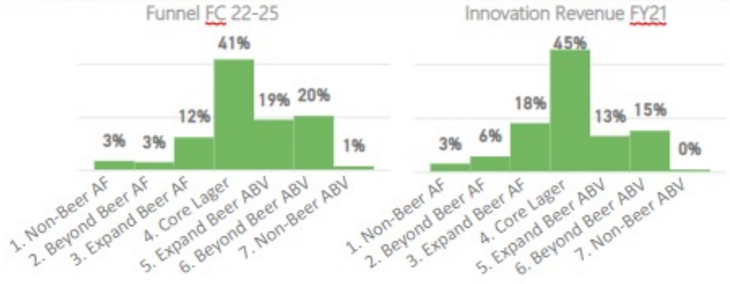
AVAILABLE IN NEXT UPDATE

MIX & BALANCE

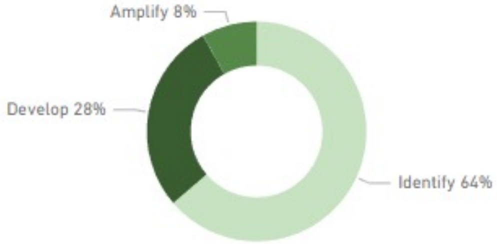
INCREMENTALITY OF FUNNEL (revenue FC 2022-2025)



BOWTIE SEGMENTATION (FUNNEL & LAUNCHED)

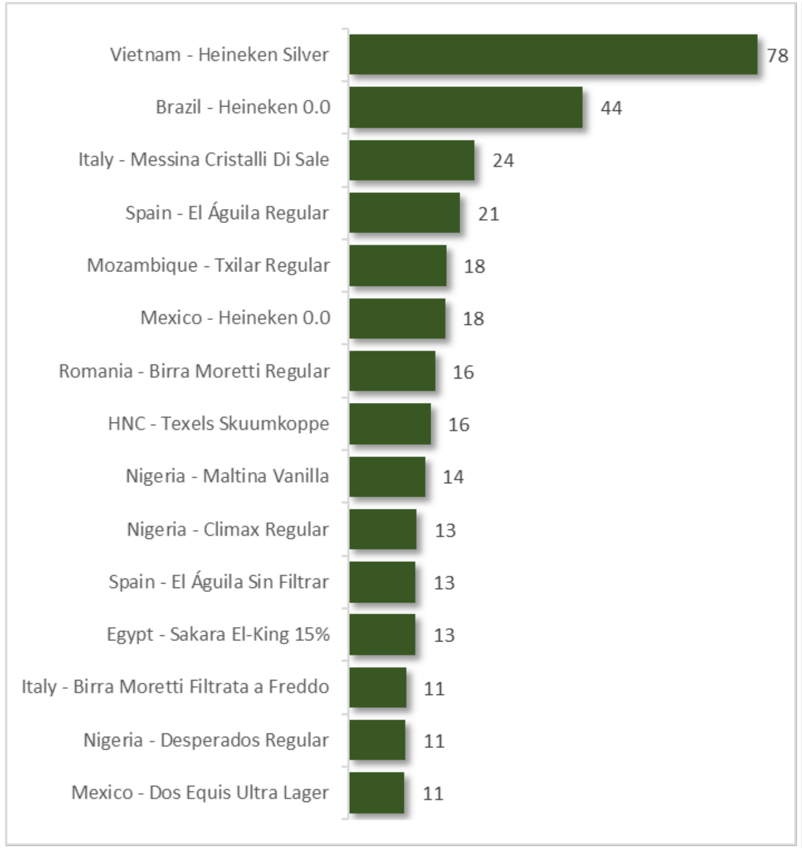


AIDA PHASE FUNNEL (Revenue FC 2022-2025)



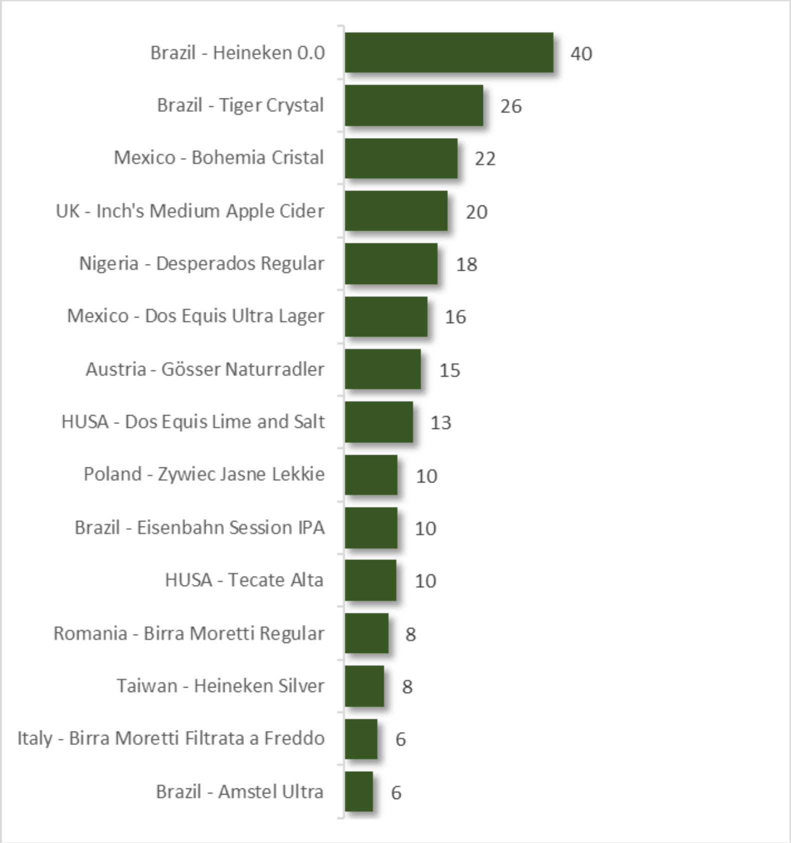
Top Innovations | a) longtail of smaller/ local innovations, b) limited funnel of scalable innovations

LOOKING BACK
Biggest Innovations by revenue 2021 (m€)



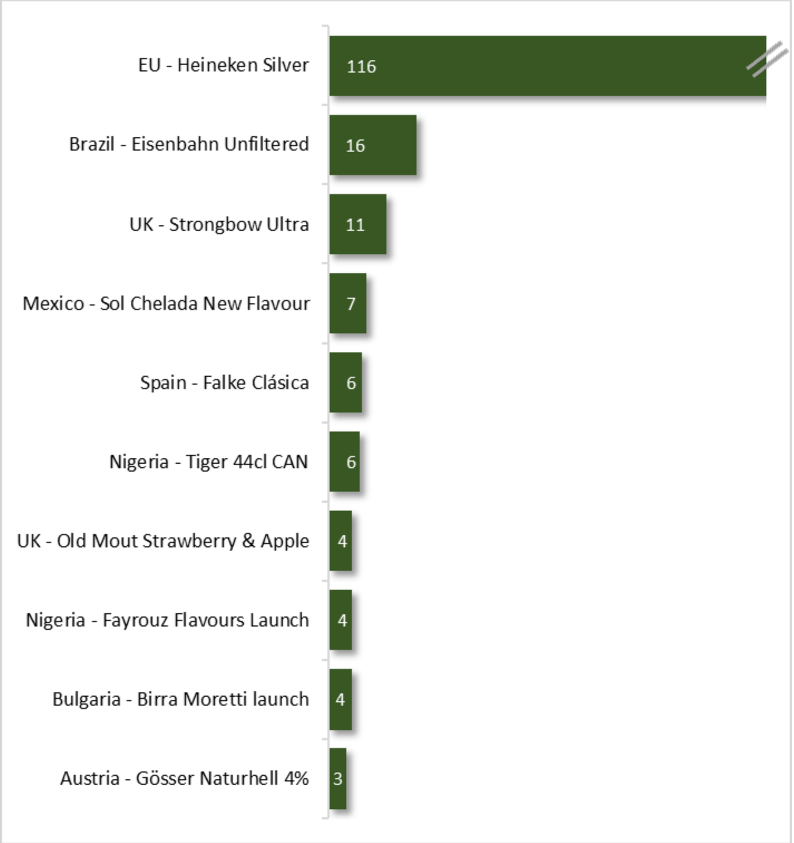
Source: CiL Innovation Revenue FY2021

LOOKING FORWARD
Biggest Innovations by abs. revenue growth in 2022 vs 2021 (m€)



Source: : CiL Innovation Revenue FY2021, AP22 OG%

LOOKING FORWARD
Biggest new launches by revenue FC for 2022 (m€)



Source: Innovation Funnel App

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LOOKING BACK: About half of innovation revenue coming from Core beer in 2021, no innovation revenue from non-beer AF. What does good look like per bowtie segment?

3%	6%	18%	45%	13%	15%	<1%
NON BEER	BEYOND BEER	EXPAND BEER	CORE BEER	EXPAND BEER	BEYOND BEER	NON BEER

Top 15 innovations based on revenue 2021

x% Share of HNV Innovation Revenue 2021

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LOOKING FORWARD: Moving beyond beer and into non beer AF, but no concrete projects in funnel for non beer ABV

3%	3%	12%	41%	19%	20%	1%
NON BEER	BEYOND BEER	EXPAND BEER	CORE BEER	EXPAND BEER	BEYOND BEER	NON BEER

Top 15 Innovations based on revenue forecast

% NONE ABV

IDENTIFY

"Buzz without the Booze"
(DSP 0.0 with a kick, Project Vibe)

RTD – Pre-mixed spirits / Cocktails

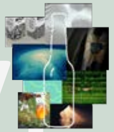
DSP Ultra

DEVELOP

Adult Soft Drink
(Moonshot EU & Zym BR)

Sol Clamato 0.0
(MEXICO)

Tiger 0.0
(APAC)



Project Sunrise
(APAC)

DSP Seltzer

AMPLIFY

Energy Malt
(project Panther AMEE)

H0.0 NEXT

HNK Silver
(EUROPE)

Edelweiss
(APAC)

Amstel Ultra Seltzer
(BRAZIL)

% HIGH ABV

x% Share of total Funnel value FC (22-25)

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Growth Platforms enable innovation at scale

Quality socializing

HOO NXT

Growth platform(s) to be identified

Letting loose

Future FABs

e.g. seltzers, ultra / ciders, collabs with spirits

Buzz without the Booze

e.g. functional drinks with nootropics / adaptogens

Instant unwinding

A winning proposition combines a specific bundle of needs – Today served by different categories

Growth platform(s) to be identified

Savoring us-time

Elegant & Simple

e.g. premium & special beers, range of flavours

Being on-trend

Natural Wind Down

e.g. functional drinks with CBD or natural relaxing ingredients

What is a growth platform?

Opportunities for **transformative, incremental growth** …

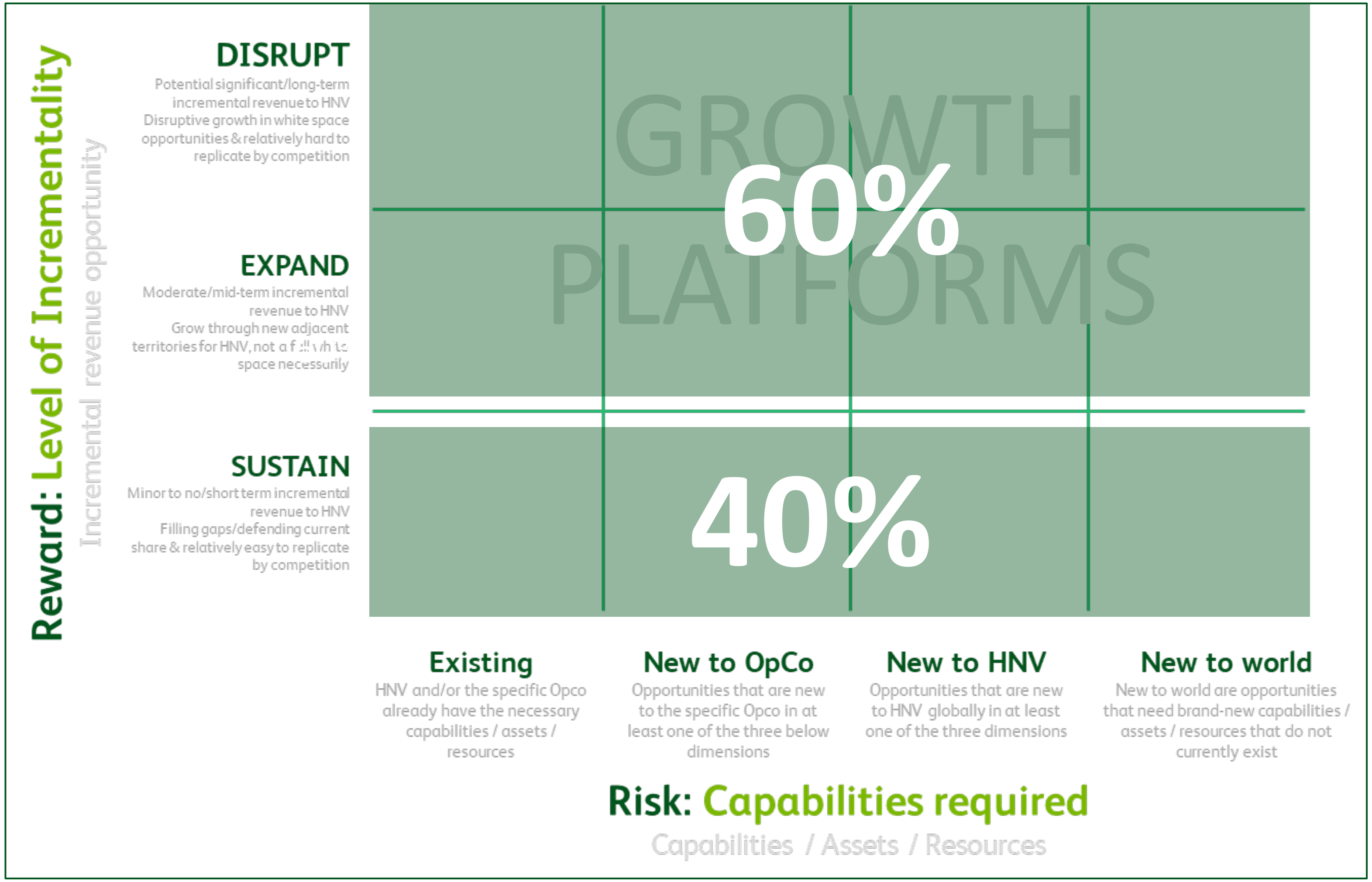
… rooted in **unmet consumer needs** within the context of a specific demand space …

… requiring product, brand and/or business model **innovation**

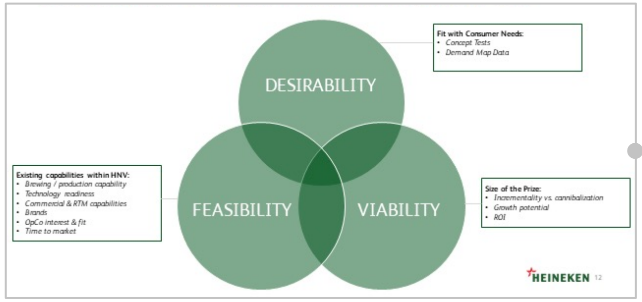
Existing categories with potential to grow

New to world categories to overcome consumer trade-offs

60% of innovation revenue to come from Growth Platforms



We are making progress on growth platform development…



Shortlisted growth platforms
based on fit with consumer needs, HNV capabilities, & size of the prize

Turned growth platforms into consumer-facing stimulus
for overnight testing in 5 markets

Selected two tools to help succeed in innovating in growth platforms
Available to anyone

… and identified key next steps

- **Socialize Growth Platforms** across the company
- **Review current innovation funnels** for fit with growth platforms
- **Refine Growth Platform principles** further
- **Develop identified Growth Platforms** further: set value ambition & deepen understanding of the consumer tensions
- **Develop Growth Platforms for other demand spaces**, starting with Quality Socializing
- **Move Growth Platforms into action** – Global & **OpCo**


13:35-14:15
Breakouts

Breakout 1

INNOVATION

Brainstorm on innovation & growth platforms

With Hubertien Koopman

Breakout 2

PORTFOLIO MGMT.

Plotting on the global demand map

With Renne Bertran

14:15-14:25

Breakouts wrap up

Back at 14:40

14:40-15:25

Implications for our Strategic Plan

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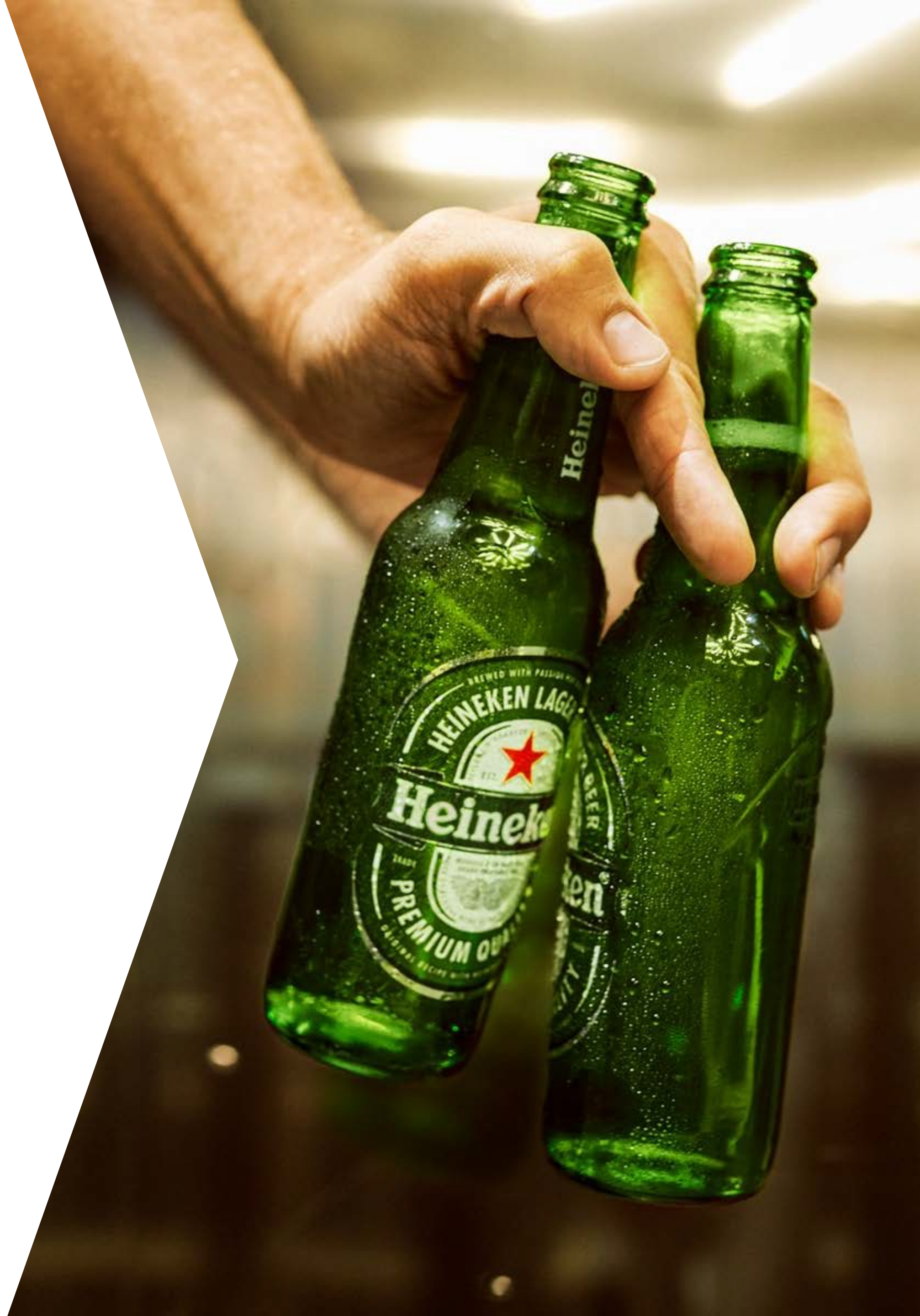
SP Briefing

Portfolio and Innovation

Marketing Council 8 March 2022



Portfolio & Innovation in the SP

"Shape the future of beer and beyond to win the hearts of consumers"

Consumers at the heart of our portfolio

Portfolio at the heart of our strategy

Innovation as the driver of portfolio shifts

The future of beer…

The future of beer…

"Any colour as long as it's black"

Benefit: *Affordable, not a horse*

The future of beer…

“Any colour as long as it’s black”

Benefit: *Affordable, not a horse*

Colours, features (but still mostly “full-size” cars)

Benefit: *Personalisation, premiumisation, functionality*

The future of beer…

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Range of models, menu of options

Benefit: *Fit with specific lifestage / lifestyle needs*

The future of beer…

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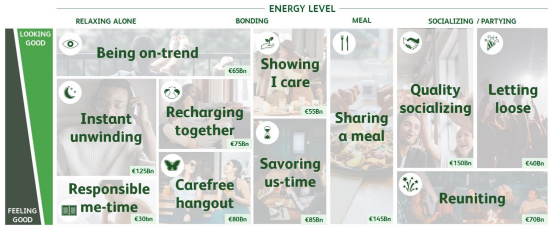
?

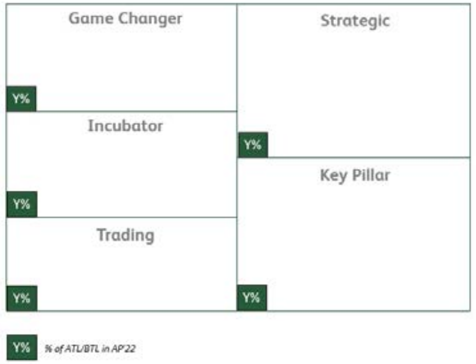
Portfolio & Innovation in the SP

What do CONSUMERS want / need and where do you have gaps / opportunities?



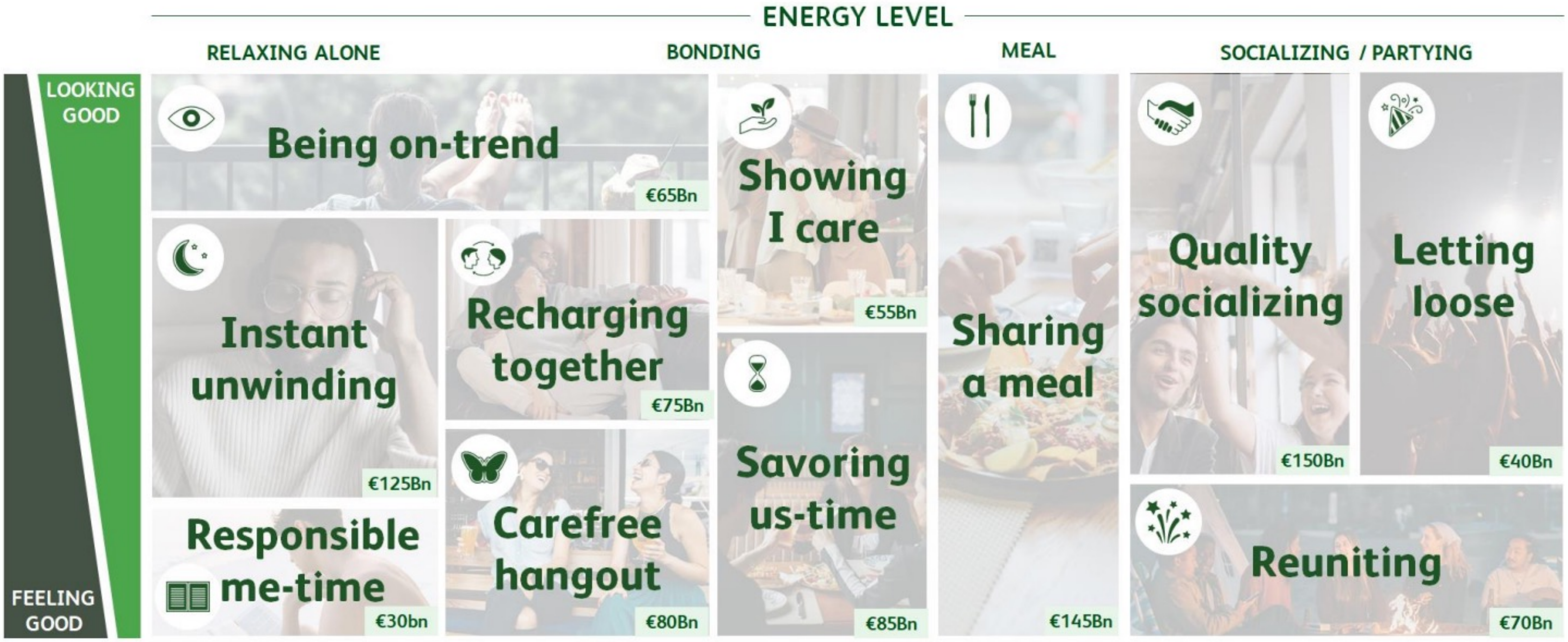
What does shaping the CATEGORY mean for you? What shifts will you make?

What are your BRAND roles and resourcing priorities to support the shifts?



What are your INNOVATION priorities and pipeline to support the shifts?

1. What do consumers want/need and where do you have gaps/opportunities?



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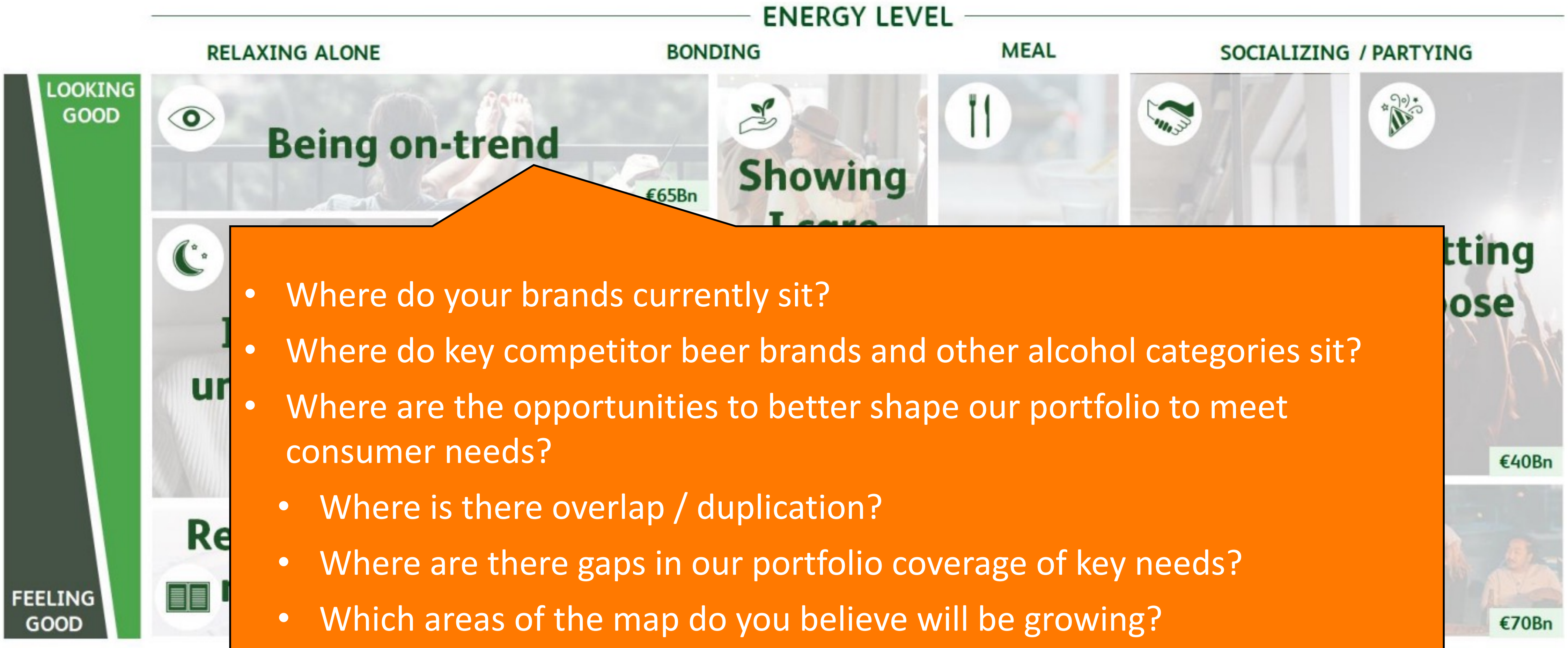

- Where do your brands currently sit?
- Where do key competitor beer brands and other alcohol categories sit?
- Where are the opportunities to better shape our portfolio to meet consumer needs?
  - Where is there overlap / duplication?
  - Where are there gaps in our portfolio coverage of key needs?
  - Which areas of the map do you believe will be growing?

1. What do consumers want/need and where do you have gaps/opportunities?

ENERGY LEVEL

	RELAXING ALONE	BONDING	MEAL	SOCIALIZING / PARTYING
LOOKING GOOD				
FEELING GOOD				

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1. What do consumers want/need and where do you have gaps/opportunities?

ENERGY LEVEL

RELAXING ALONE | BONDING | MEAL | SOCIALIZING / PARTYING

LOOKING GOOD

FEELING GOOD

Where do you believe consumer growth opportunities exist in your market and whether / where you may have gaps in your brand and product portfolio?

- Where do you feel your overall portfolio sits vs. the broad consumer demand dimensions above?
- Where do you feel there are gaps that your portfolio does not fully cover?
- Where do you feel beer competitors' portfolios are focused? Do they have a similar coverage to ours or are there differences?
- Where do you feel other key alcohol categories sit on the map above?

2. What does shaping the category mean for you? What shifts will you make?

"Shape the future of beer and beyond to win the hearts of consumers"

	Focus & Differentiate CORE LAGER	Expand BEER	Move BEYOND BEER
Premium	X% Y% X% → Y%	X% Y% X% → Y%	X% Y%
Mainstream	X% Y% X% → Y%	X% Y% X% → Y%	
Discount	X% Y% X% → Y%	X% Y% X% → Y%	X% → Y%

X% *% of total 2022 market volumes*

Y% *Forecast segment vol. CAGR '22-'25*

X% → Y% *2022 2025 % of OpCo Revenue*

2. What does shaping the category mean for you? What shifts will you make?

"Shape the future of beer and beyond to win the hearts of consumers"

	Focus & Differentiate CORE LAGER	Expand BEER	Move BEYOND BEER
Premium	X% Y% Heineken X% → Y%	X% Y% X% → Y%	X% Y% STRONGBOW APPLE CIDERS
Mainstream	X% Y% WARKA Cruzcampo X% → Y%	X% Y% X% → Y%	
Discount	X% Y% X% → Y%	X% Y% X% → Y%	 X% → Y%

X% — *% of total 2022 market volumes*

Y% — *Forecast segment vol. CAGR '22-'25*

X% → Y% — *2022 2025 % of OpCo Revenue*

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"Shape the future of beer and beyond to win the hearts of consumers"

Sessionable lager to address bitterness barriers

	e CORE LAGER		Expand BEER		Move BEYOND BEER	
Premium	X%	Y%	X%	Y%	X%	Y%
	X%	Y%	X%	Y%		
Mainstream	X%	Y%	X%	Y%		
	X%	Y%	X%	Y%		
Discount	X%	Y%	X%	Y%		
	X%	Y%	X%	Y%	X%	Y%

X% *% of total 2022 market volumes*

Y% *Forecast segment vol. CAGR '22-'25*

X% → Y%
2022 *2025*
% of OpCo Revenue

2. What does shaping the category mean for you? What shifts will you make?

"Shape the future of beer and beyond to win the hearts of consumers"

Sessionable lager to address bitterness barriers

Reposition to address "carefree hangout"

	e CORE LAGER	Expand BEER	Move BEYOND BEER
Premium	X% Y% Heineken → Heineken SILVER X% → Y%	X% Y% X% → Y%	X% Y% STRONGBOW APPLE CIDERS
Mainstream	X% Y% WARKA Cruzcampo X% → Y%	X% Y% X% → Y%	
Discount	Y% X% → Y%	X% Y% X% → Y%	X% → Y%

X% — *% of total 2022 market volumes*

Y% — *Forecast segment vol. CAGR '22-'25*

X% → Y% — *2022* / *2025* — *% of OpCo Revenue*

2. What does shaping the category mean for you? What shifts will you make?

“Shape the future of beer and beyond to win the hearts of consumers”

	e CORE LAGER	Expand BEER	Move BEYOND BEER
Premium	X% Y% Heineken → Heineken SILVER X% → Y%	X% Y% IPA X% → Y%	X% Y% STRONGBOW APPLE CIDERS
Mainstream	X% Y% WARKA, Cruzcampo X% → Y%	X% Y% X% → Y%	
Discount	Y% X% → Y%	X% Y% X% → Y%	X% → Y%

Sessionable lager to address bitterness barriers

IPA to address discovery need among…

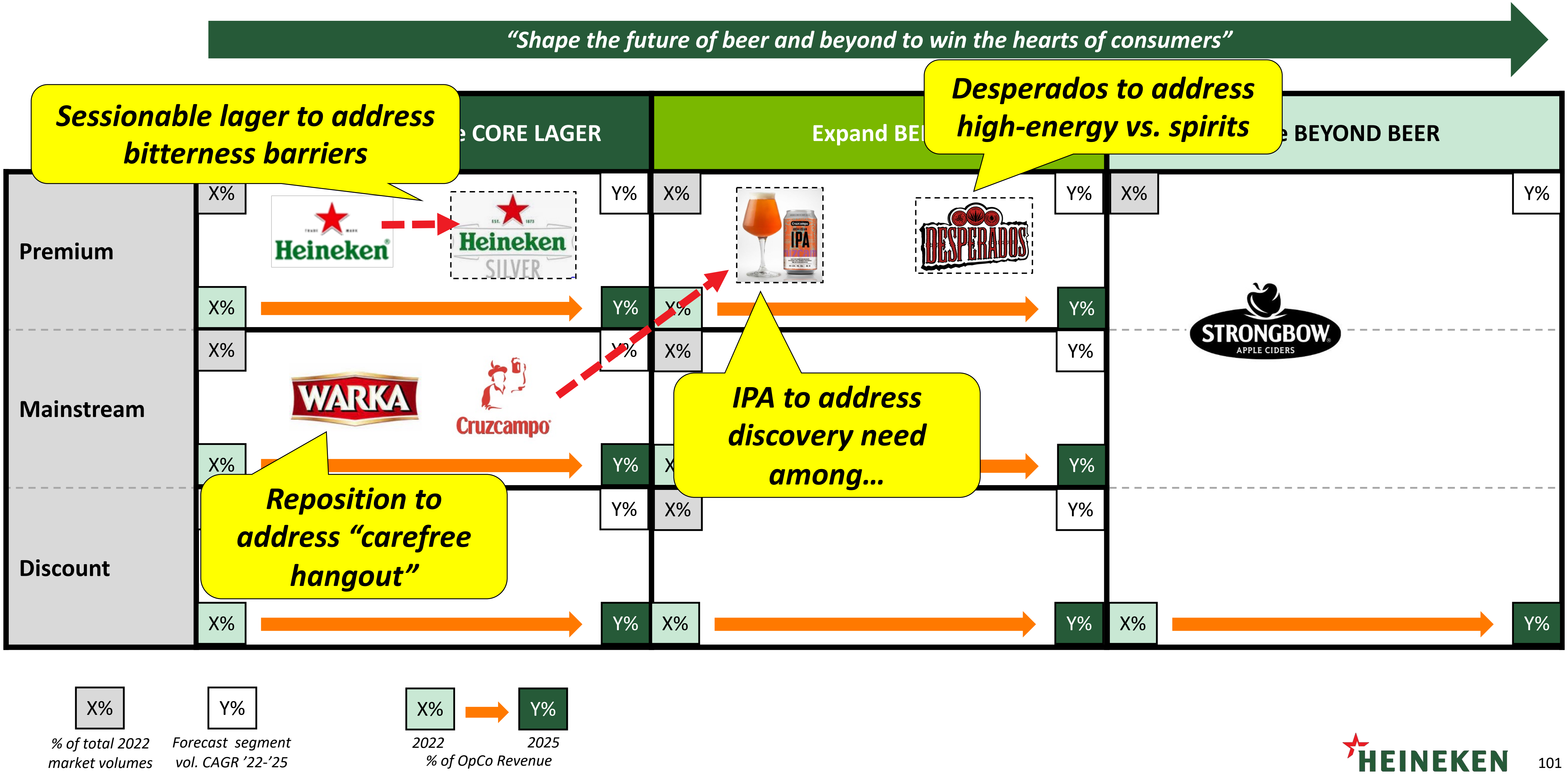
Reposition to address “carefree hangout”

X% — *% of total 2022 market volumes*

Y% — *Forecast segment vol. CAGR ’22-’25*

X% → Y% — *2022 2025 % of OpCo Revenue*

2. What does shaping the category mean for you? What shifts will you make?



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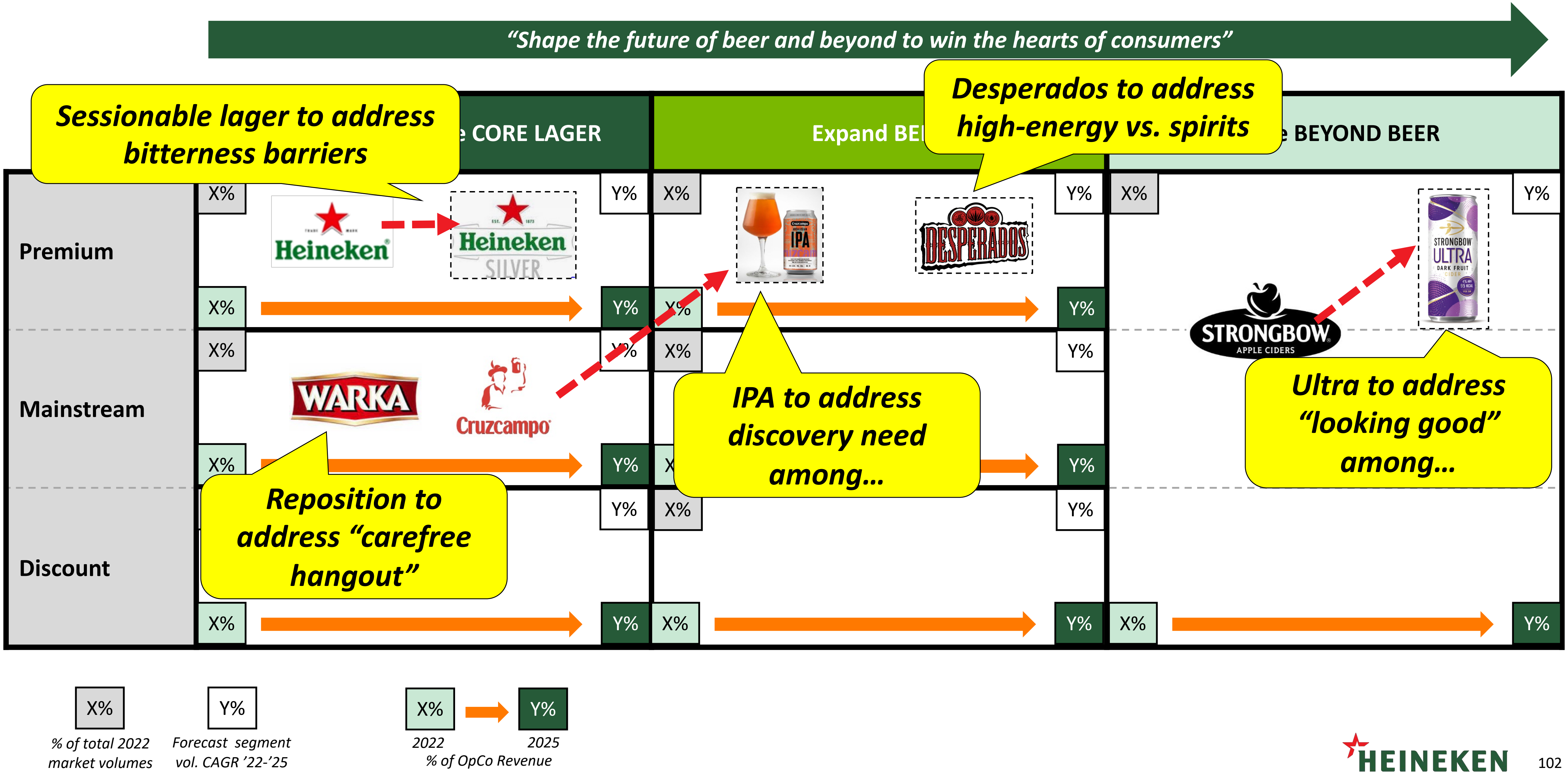


3. What are your brand roles and resourcing priorities to support the shifts?

Brand Roles and Changes vs. Current

Game Changer	Strategic
Y%	Y%
Incubator	**Key Pillar**
Y%	
Trading	
Y%	Y%

Y% *% of ATL/BTL in AP'22*

Implications for Portfolio and Resourcing

3. What are your brand roles and resourcing priorities to support the shifts?

Brand Roles and Changes vs. Current

Implications for Portfolio and Resourcing

Y%

Y%

Y%

Y%

What actions will need to be taken to deliver the brand's intended role in the portfolio, given brand stage and current brand power? e.g.,

- Repositioning?
- Improved creativity / content?
- Innovation?

What resourcing changes needed?

- Which brands = more ATL/BTL support than today?
- Which brands = ATL/BTL reduced and freed-up?
- What (if any) new brands will need support?
- Can we rationalise and simplify the portfolio?

4. What are your innovation priorities and pipeline to support the shifts?

		2023	2024	2025	% of 2025 Revenue
Focus & Differentiate Core Lager	Blockbuster	*Amstel Ultra launch*	*Heineken Silver launch*		
	Incubator				
	Line Extension	Mainstream Brand unfiltered line extension	Mainstream Brand Ice (sessionable)		
Expand Beer	Blockbuster			*Growth Platform 2 new launch*	
	Incubator		Growth Platform 1 new launch		
	Line Extension	Lagunitas Day Time IPA launch	Desperados flavor innovation		
Move Beyond Beer	Blockbuster				
	Incubator				
	Line Extension				

Xxx = Top 3 innovations currently in plans

4. What are your innovation priorities and pipeline to support the shifts?

		2023	2024	2025	% of 2025 Revenue
Focus & Differentiate Core Lager	Blockbuster	*Amstel Ultra launch*	*Heineken Silver launch*		
	Incubator				
	Line Extension	Mainstream Brand unfiltered line extension	Mainstream Brand l		
Expand Beer	Bloc				
	Incu				
	Line				
Move Beyond Beer	Bloc				
	Incu				
	Line Extension				

- Will it deliver your strategy and growth ambition?
- Does it address key consumer and competitive trends?
- Does it address key gaps in Demand Spaces / consumer needs?
- Does it address key gaps in pack types and price tiers?
- Is it sufficiently premium?
- Is it margin accretive for your OpCo?

Xxx = Top 3 innovations currently in plans

Next Steps…

- Some Regional tailoring off these foundations
- Not everyone does everything
- Not just finance!
- Starting the journey
- Good SP dialogue > Good SP templates

14:40-15:25

Moderation

HEINEKEN

RESPONSIBLE CONSUMPTION & MODERATION

Update for Marketing Council

March 2022

NON ALC IS NOT JUST FOR JANUARY

#NowYouCan

#Anythingbutdry

#Sobercurious

#FutureWithMoreCheers

Our Strategy on a Page

OUR VISION:

Be the undisputed leader in responsible alcohol consumption communication and activation

Raise awareness and address harmful use of Alcohol

- Partnerships to address alcohol related harm associated with drink driving, violence and health
- Full transparency and communication of alcohol related harm on all labels
- Reach consumers with responsible consumption messaging

KPI's:
1)100% of OpCo's have a partnership connected to addressing the harmful use of alcohol.
2) All labels will have a QSR code linked to alcohol related health information by 2023
3) 1 Billion Consumers reached with Responsible Consumption messaging per year.

Make Moderation Cool

- Enjoy Heineken Responsibly on all communication for the Heineken Brand
- Responsible Consumption strategy and communication beyond Heineken Brand leveraging our Zero Portfolio
- Ensure responsible consumption is reflected on new communication digital channels (Twtich, Tik Tok)
- Use influencers to communicate moderation
- Protect our right to sponsorship through moderation messaging

KPI's:
1)10% of Heineken Brand spend by OpCo on EHR messaging

Always a Choice

- Ensure our consumers always have a zero alcohol choice avaiable on our brands
- Communicate Zero Alcohol availabiltiy on Brand messaging
- Ensure availability of Zero Alcohol options by extending distribution

KPI's:
1) 2 invested brands with a Zero Option by 2023 in OpCo's representing 90% of HNV Revenue
2) Dedicated Always a Choice ATL/BTL investment
3) Reach 100% distribution of Zero Beer alongside Motherbrand.

Responsible Marketing Code

1) Digital Guardrails on Participation in Emerging Communication Platforms
2) Guidelines on use and activation of Influencers
3) Guidelines on use of User Generated Content
4) Sponsorship Guardrails including E-Gaming participation and activation

We have a Responsible Consumption & Moderation Working Group

Objective:
To review and decide on HNV brand led communication & innovation that may impact our existing RMC and need consideration given the ever changing consumer and external/competitive landscape.

Who:
Corporate Affairs, Legal, Global Commerce

What:
We meet monthly and any Global function or OpCo can bring a challenge to the group to discuss

Sponsors:
Stacy & James

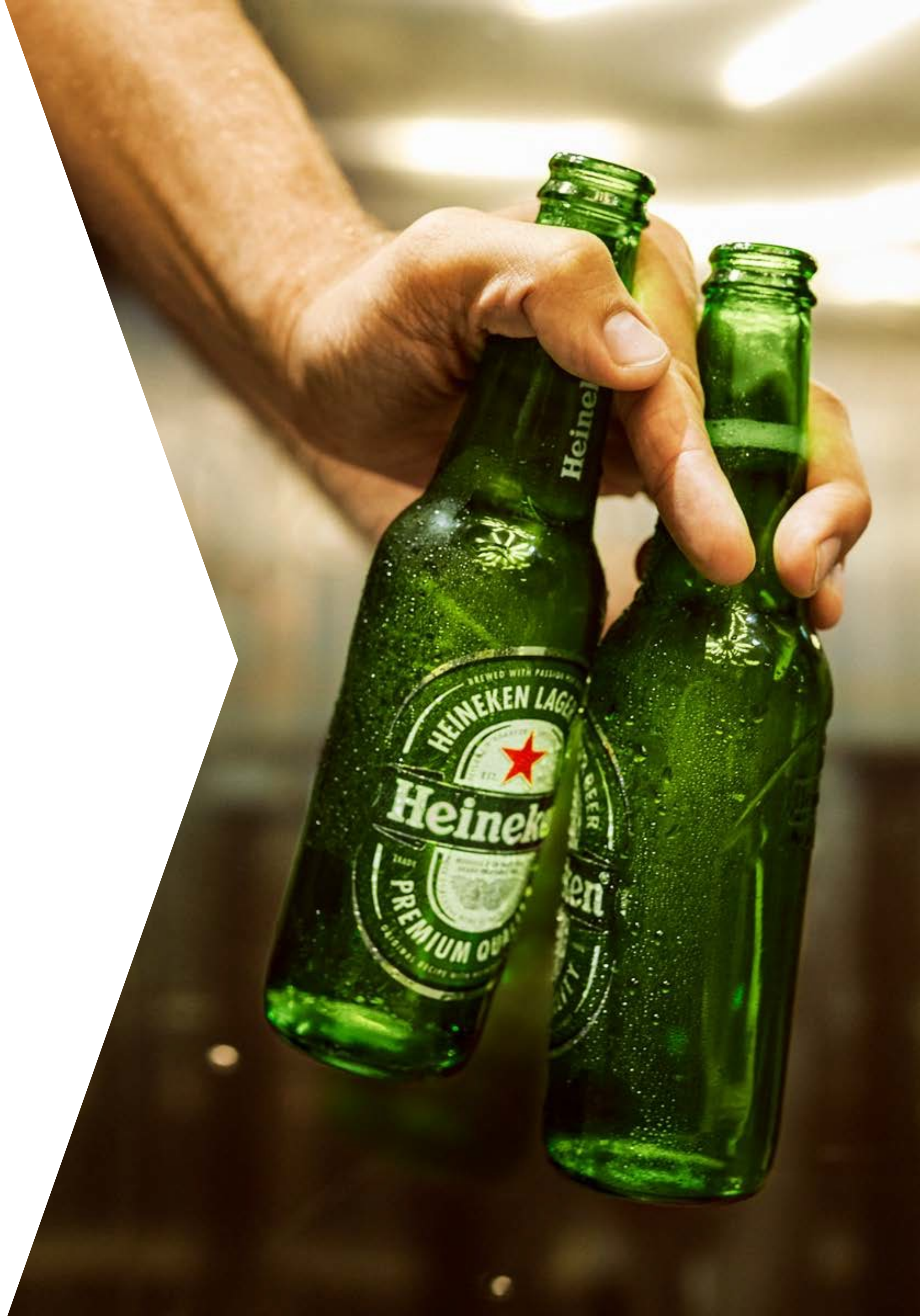
Things we discuss & decide on guardrails:
How we participate on media platforms where audience below LDA is less clear (Tik Tok, Twitch)
How we particiapte in the Metaverse (Gaming, VR, AR)
How we innovate beyond beer into mood alternation (CBD/THC)
How our Non-Alc Beer Brands should be marketed (Channel, Communication, Innovation)

HEINEKEN

EverGreen

Consumer friendly labelling

- Implementation of new labelling policy



Why a change

As part of the Brew a Better World – raise the bar 2030 the following statement is made

We advocate for consumer transparency so that everybody can make an informed choice about the products they consume. That's why we provide ingredient and nutritional information that goes beyond the industry standard on pack for our alcoholic beverages and their 0.0 line extensions.

New Labelling Policy in place by End 2023

Objective:
Make you aware of the New Labelling Policy being implemented from now across all primary packs on alcoholic beverages and their non-alcholic line extension.

Who:
Supply Chain/Legal/Marketing

When:
All labels must be changed over by End Dec 2023

How:
Full implementation playbook cascaded to teams in September 2021. Ensure your teams are fully aware and a working group is established to implement managing transition and minimizing pack destruction costs.

Tracking:
BABW commitment reporting on a quarterly basis will track % SKU compliance through to End Dec 2023

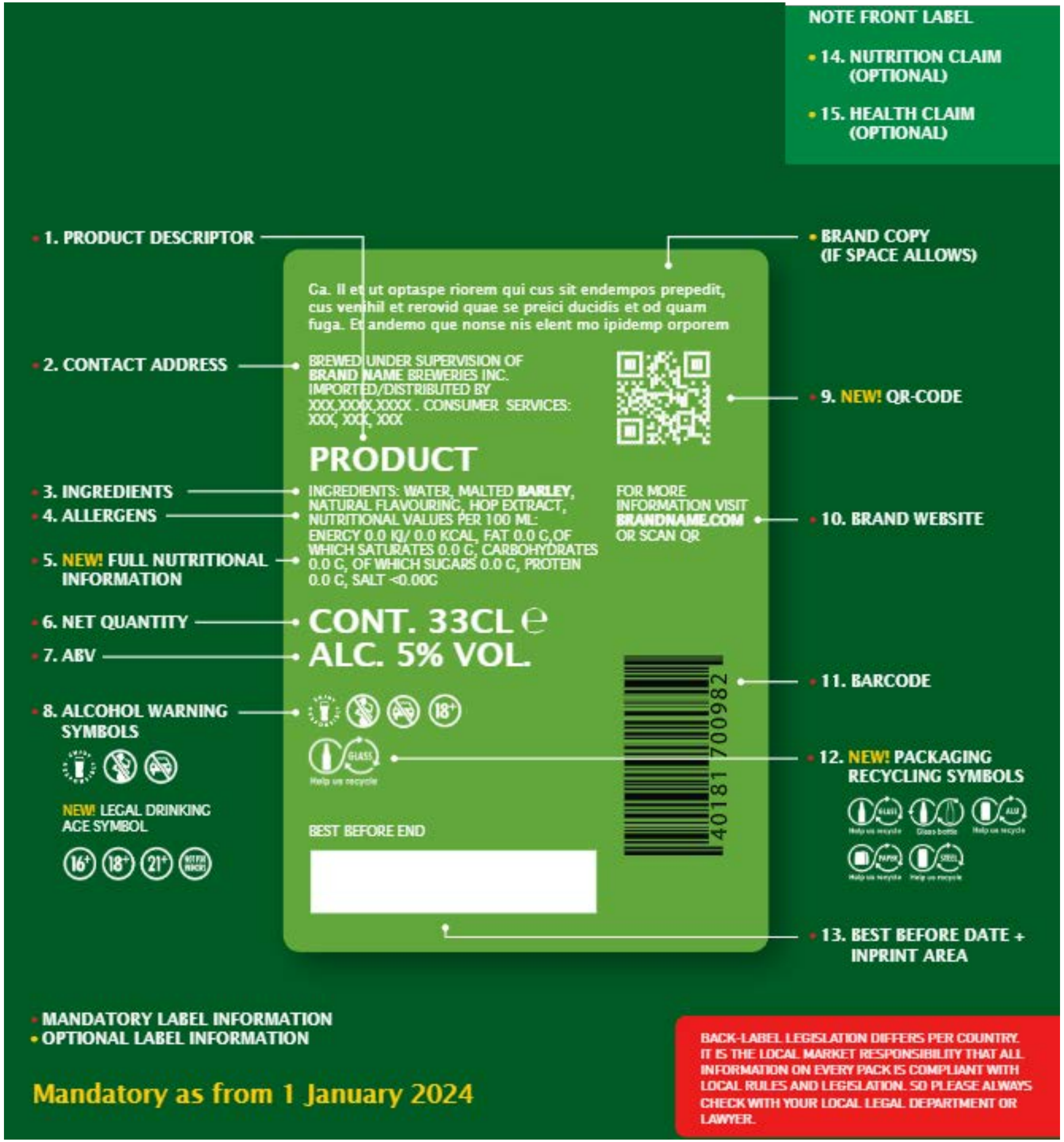
The Changes

In scope:

Consumer facing primary packaging of alcohol containing beverages and their non-alcoholic line extension containing mandatory information for consumers

New mandatory requirements:

1. Declaring ingredients and full nutrition information (energy, fat, saturates, carbohydrates, sugars, protein, salt)
2. 4 alcohol warning symbols for all brands (Enjoy responsibly, Don't drink and drive, Don't drink pregnant and Legal drinking age)
3. QR-code to lead consumer to online alcohol and health information
4. Recycling logo's (were already applied on Global brands)
5. Best before date (almost everywhere applied)


NOTE FRONT LABEL
14. NUTRITION CLAIM (OPTIONAL)
15. HEALTH CLAIM (OPTIONAL)
1. PRODUCT DESCRIPTOR
BRAND COPY (IF SPACE ALLOWS)
Ga. Il et ut optaspe riorem qui cus sit endempos prepedit, cus venihil et rerovid quae se preici ducidis et od quam fuga. Et andemo que nonse nis elent mo ipidemp orporem
2. CONTACT ADDRESS
BREWED UNDER SUPERVISION OF BRAND NAME BREWERIES INC. IMPORTED/DISTRIBUTED BY XXX,XXXX,XXXX . CONSUMER SERVICES: XXX, XXX, XXX
9. NEW! QR-CODE
PRODUCT
3. INGREDIENTS
4. ALLERGENS
5. NEW! FULL NUTRITIONAL INFORMATION
INGREDIENTS: WATER, MALTED BARLEY, NATURAL FLAVOURING, HOP EXTRACT, NUTRITIONAL VALUES PER 100 ML: ENERGY 0.0 KJ/ 0.0 KCAL, FAT 0.0 G OF WHICH SATURATES 0.0 G, CARBOHYDRATES 0.0 G, OF WHICH SUGARS 0.0 G, PROTEIN 0.0 G, SALT <0.00G
FOR MORE INFORMATION VISIT BRANDNAME.COM OR SCAN QR
10. BRAND WEBSITE
6. NET QUANTITY
CONT. 33CL ℮
7. ABV
ALC. 5% VOL.
11. BARCODE
40181 700982
8. ALCOHOL WARNING SYMBOLS
NEW! LEGAL DRINKING AGE SYMBOL
16+ 18+ 21+
GLASS
Help us recycle
12. NEW! PACKAGING RECYCLING SYMBOLS
BEST BEFORE END
13. BEST BEFORE DATE + INPRINT AREA
MANDATORY LABEL INFORMATION
OPTIONAL LABEL INFORMATION
Mandatory as from 1 January 2024
BACK-LABEL LEGISLATION DIFFERS PER COUNTRY. IT IS THE LOCAL MARKET RESPONSIBILITY THAT ALL INFORMATION ON EVERY PACK IS COMPLIANT WITH LOCAL RULES AND LEGISLATION. SO PLEASE ALWAYS CHECK WITH YOUR LOCAL LEGAL DEPARTMENT OR LAWYER.

QR Code – Implementation Options

Purpose: As part of our commitment to transparency, HEINEKEN is providing further resources to consumers to learn more about the impact of alcohol on their health.

We will provide this information through a QR code on each label. These QR codes must linked to a landing page where further information on alcohol and health is clearly and easily accessible. Providing this information may be executed as a key feature of a branded website that also provides other brand-relevant consumer information, such as information about sustainability.

For QR codes linked to a branded landing page: Unless prohibited by local legislation or regulation, the unique webpage titled "Alcohol and Health information“ should be part of the primary navigation for the landing page. Language for the page should be copied for the Alcohol and Health page located here translated to local language.

For QR codes not linked to a branded landing page: Unless prohibited by local legislation or regulation, the QR Code should link directly to the "Alcohol and Health" page located here, or a similar page in local language.

All brands must have an immediate as well as longer term solution for providing this information via a landing page

	Global Brand	Regional Brand	Local Brand
1st option	Global Brand website	Regional Brand website	Local Brand website
2nd option	n.a.	Local Brand website	Global HNV website
2022 option	n.a.	Global HNV website	n.a.

See FAQ for further practical information for QR codes

Project Hummingbird

Making moderation cool

Project Hummingbird
Making moderation cool

Develop a purposeful 0.0 portfolio communication campaign linked to responsibility

VISION

“to change consumer behaviour and encourage a more responsible drinking habit as part of a routine, enabled by 0.0 Beer”

Industry issue ←

Consumers are excessively drinking alcohol

0.0 Beer is still rejected/not consumed by high % of alcohol drinkers

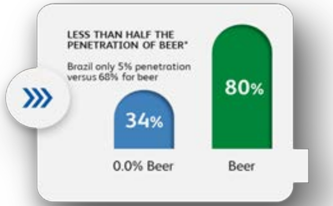
→ Category issue

Consumer trends tailwind

Increasing regulatory pressure

HNV company focus on BABW

Big Ambition on future of 0.0



Huge penetration opportunity

Social stigma one of biggest barriers

Project Hummingbird
Making moderation cool

Develop a purposeful 0.0 portfolio communication campaign linked to responsibility

BUILDING A NEW MODERATION BEHAVIOUR

Consumption of 0.0 Alcohol

Less explicit to moderation

More explicit to moderation

Reduction of Alcohol

Project Hummingbird
Making moderation cool

The brief

0.0 affirmative

Moderation at the core

Purposeful & Meaningful

Portfolio-led

REALLY DRIVE BEHAVIOUR CHANGE

33% of consumers often switch between alcoholic and non-alcoholic drinks when on a night out. How do we get more people to switch with 0.0

Start the evening with a 0.0

Switch between 0.0 beer and Regular beer

Finish the evening with a 0.0 beer

Switch up your usual in the midweek for a 0.0 beer occasion

THE PLAN

WHO

Commercially-led by ZAB, in partnership with corporate affairs

6 key OPCOs involved from the outset:
Spain, UK, Austria, Mexico, Vietnam, South Africa

Two Agency Creative Collectives:

THE LIBERTY GUILD

BeenThere DoneThat

WHAT

Project deliverables to impact ATL, BTL, PR, internal comms maybe beyond for External Comms

WHEN

Assets available for Jan 2023