HÄAGEN-DAZS
POINT OF DIFFERENCE

3 in 10 Shoppers are buying Ice Cream on Impulse

General Mills Impulse %

Category	%
Tub of Ice Cream	30.0%
Individual Ice Cream or Lolly	28.0%
Yogurt	25.6%
Sweet Home Cooking/Baking (e.g. Betty Crocker)	25.3%
Multipack Cereal Bars	22.5%
Single Cereal Bars	22.0%
Cooking Kits (e.g. Fajita, Stir Fry etc)	19.5%
Breakfast Cereals	16.3%
Cooking/ Pasta/ Curry Sauces	14.3%
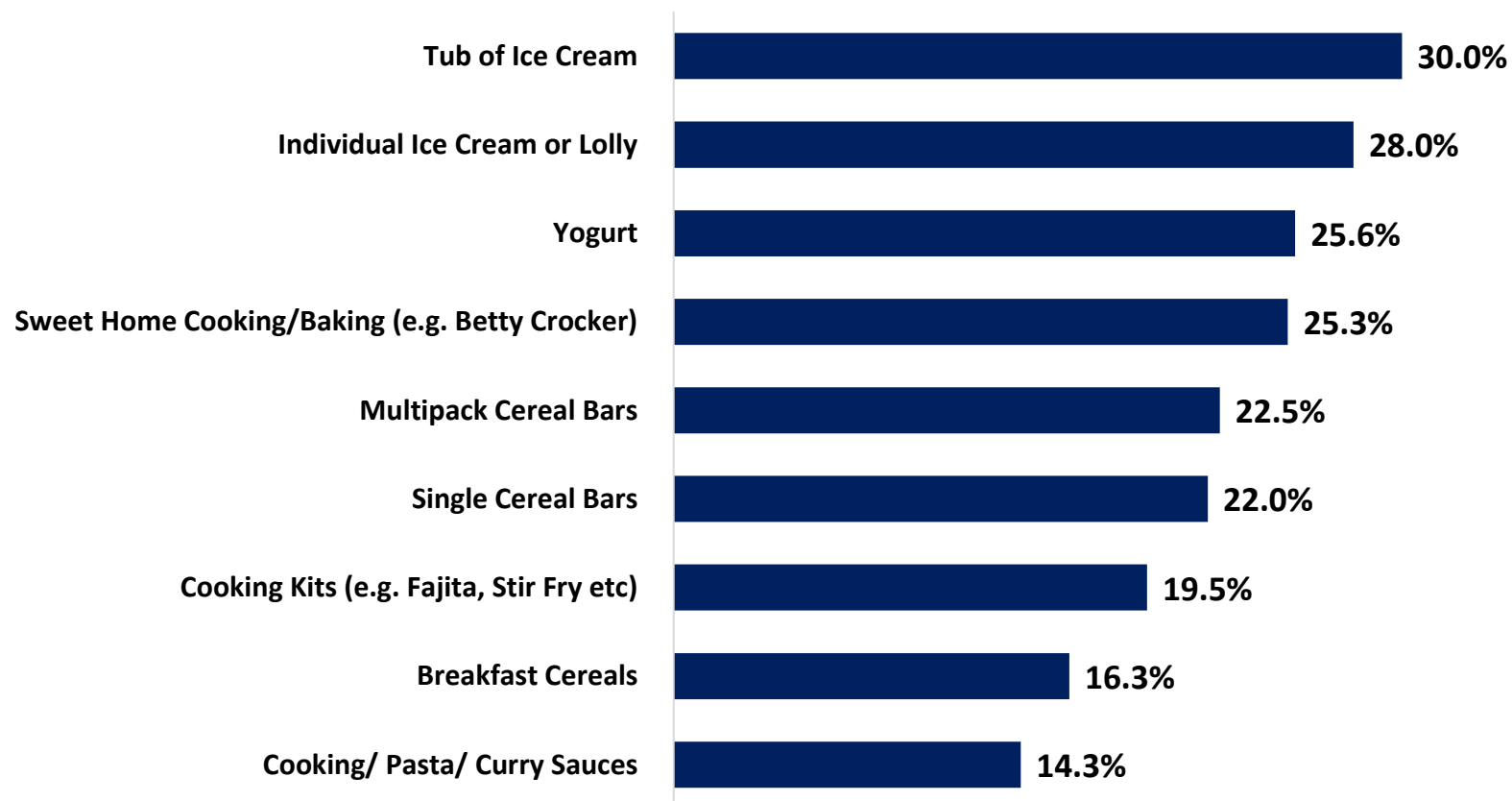
Opportunity to drive frequency and penetration at the point of purchase by increasing 'Top of Mind' awareness via strong distributions and being visible at fixture.

Source: Lumina Intelligence Consumer Tracking Programme (CTP) w/e 22/11/2020 to w/e 30/06/2021

The Ice Cream Shopper is extremely valuable to the Convenience Shopper – over indexing across all measures

	Basket spend	Visit frequency (per week)	Basket size
Average	£10.82	2.5 times	3.3 items
Managed Convenience	£11.60	2.3 times	3.5 items
Symbols & Independents	£8.92	2.9 times	2.8 items
Ice Cream	£29.54	3.3 times	6.2 items

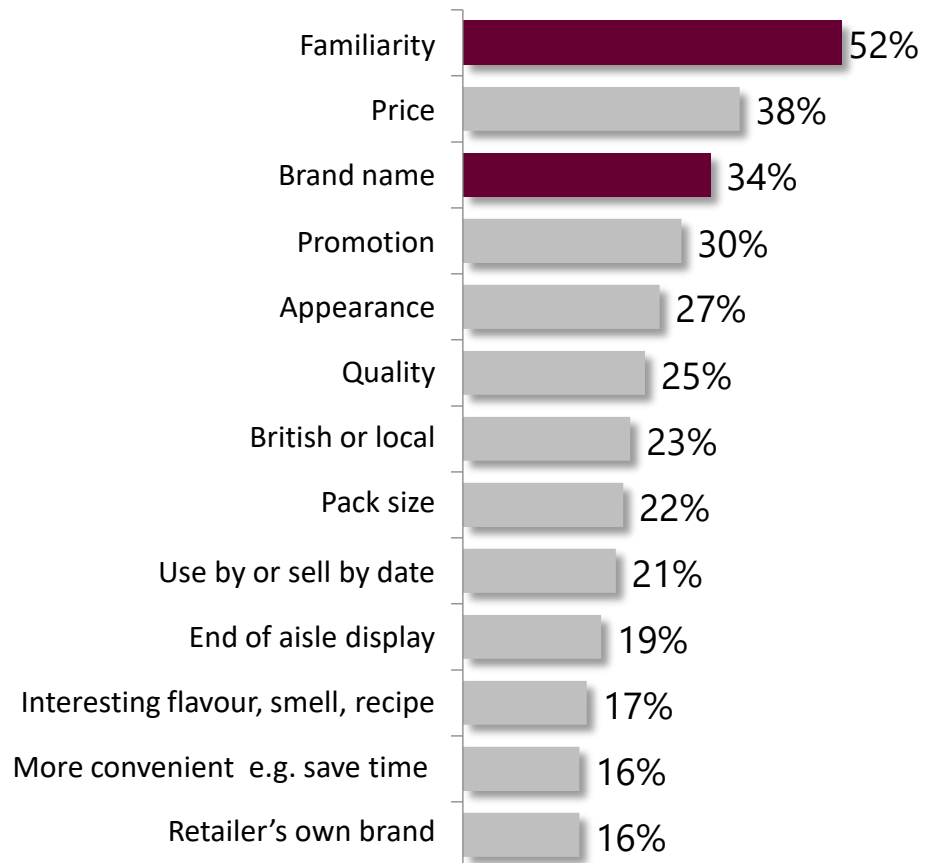Source: Lumina Intelligence Consumer Tracking Programme (CTP) w/e 22/11/2020 to w/e 30/05/2021
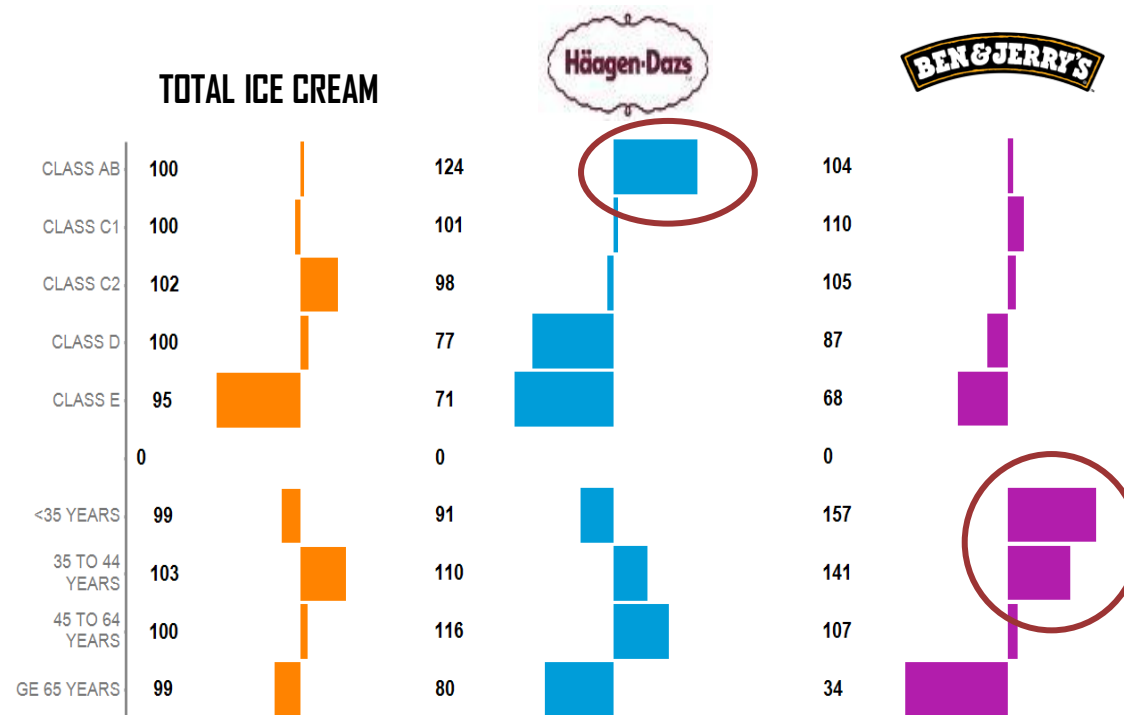
Brands are important in Convenience stores more so than in other channels and Häagen-Dazs has a unique shopper profile

Familiarity and Brand names drive product choice at Convenience Stores

Top drivers of product choice on your most recent trip

Driver	%
Familiarity	52%
Price	38%
Brand name	34%
Promotion	30%
Appearance	27%
Quality	25%
British or local	23%
Pack size	22%
Use by or sell by date	21%
End of aisle display	19%
Interesting flavour, smell, recipe	17%
More convenient e.g. save time	16%
Retailer's own brand	16%

Having unique brands attracting different shoppers is vital

TOTAL ICE CREAM   Häagen-Dazs   BEN&JERRY'S

	TOTAL ICE CREAM	Häagen-Dazs	BEN&JERRY'S
CLASS AB	100	124	104
CLASS C1	100	101	110
CLASS C2	102	98	105
CLASS D	100	77	87
CLASS E	95	71	68
	0	0	0
<35 YEARS	99	91	157
35 TO 44 YEARS	103	110	141
45 TO 64 YEARS	100	116	107
GE 65 YEARS	99	80	34

Häagen-Dazs Pint Buyers spend 10% more <u>per visit</u> and spend a 1/3 more <u>per year</u> in Ice Cream in Convenience

Spend Per VISIT

£3.82 **£3.49**

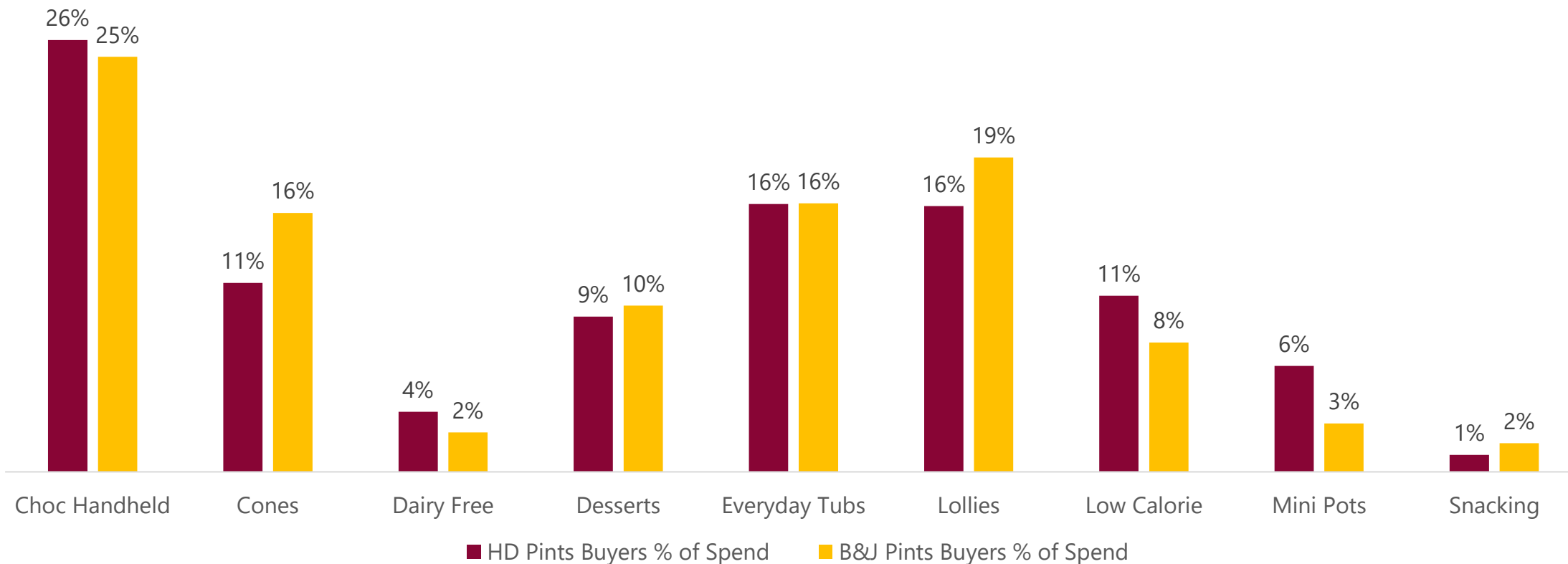## Spend Per YEAR

£92.39 **£69.06**

Häagen-Dazs Buyers are very valuable to the category – opportunity to maintain and drive frequency, AWOP and penetration of these shoppers across multiple formats

Source: Spend on Ice Cream in Convenience **Per Visit and Spend Per Year** MAT TY Nielsen Data to 09.10.21

Häagen Dazs Pints Buyers spend a higher proportion of their other sub-category spend on the 'healthy' options such as Dairy Free, Low Calorie and Mini Pots

EUAU

	Choc Handheld	Cones	Dairy Free	Desserts	Everyday Tubs	Lollies	Low Calorie	Mini Pots	Snacking
HD Pints Buyers % of Spend	26%	11%	4%	9%	16%	16%	11%	6%	1%
B&J Pints Buyers % of Spend	25%	16%	2%	10%	16%	19%	8%	3%	2%

■ HD Pints Buyers % of Spend   ■ B&J Pints Buyers % of Spend

Häagen-Dazs encourages shoppers to purchase in those growing and popular formats – opportunities to drive growth in emerging segments.

Source: Nielsen 09.10.201

Haagen Dazs performs incredibly well as a Treat outside the norm, which remains a core need for Ice Cream as a whole

% of Servings Selected for Enjoyment Needs (24 w/e 3 October 2021)

Led by **'Treat or Reward'** (72.8% of Servings, 44.1% for Total Ice Cream), and **'Fancied a Change'** (17.3% of Servings, 10.1% for Total Ice Cream)

Total Ice Cream

94%

CARTE D'OR

95.7%

BEN&JERRY'S

96.5%

MAGNUM

97.1%

Häagen-Dazs

98.1%

Encourage shoppers to trade up to a premium offering to cater for that special treating occasion

Kantar Usage | Total Ice Cream and Haagen-Dazs Ice Cream | 24 w/e 3 October 2021 versus 24 w/e 4 October 2020 and 24 w/e 6 October 2019 (where specified)