

NSLC

Planning Together to Meet the Needs of Nova Scotians



DESIGN

RESEARCH



B



Amanda Scarff

Manager Local Engagement

AGENDA

- 1 **COMMON PURPOSE & SERVICE STANDARDS**
- 2 **ICE PRIORITIES**
- 3 **SHOPPER DATA, INSIGHTS, & CATEGORY PLANS**
- 4 **BREAK**
- 5 **AGENCY NETWORK**
- 6 **AIRMILES**
- 7 **Q&A WITH NSLC EXECUTIVE TEAM**



John Francis

Vice President Insights & Customer Engagement

NSLC

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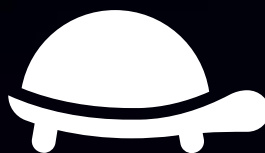


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CURIOUS TO CONNECT 16%



ROUTINE BUT NOT RUSHED 25%



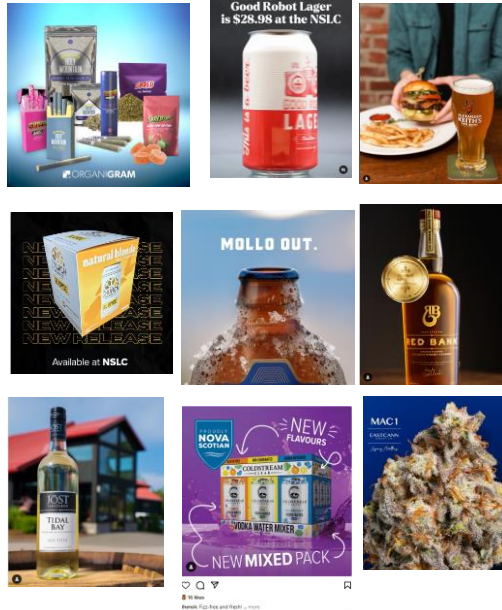
IN & OUT 59%

SHOPPER JOURNEY



Pre-shop

Marketing and other influence working to shape the market



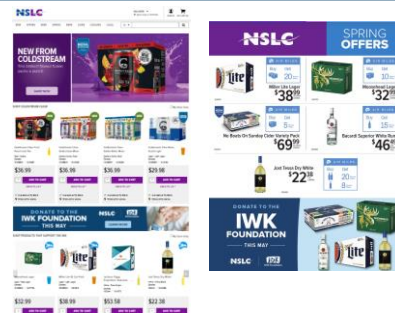
Stimulus

What is driving the consumption occasion

- I am looking to relax/unwind
- I am looking to treat myself
- I am looking to impress others

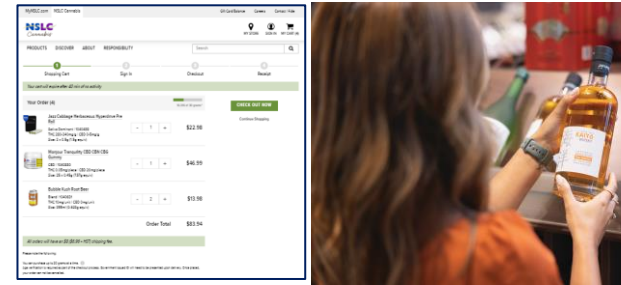
Research & Planning

I want to find out more information and/or plan my visit before I buy.



Shopping

I head to the store or online to buy



Post-shop

I want to share how my shopping experience and consumption experience went.





MyNSLC.com NSLC Cannabis Gift Card Balance Careers Contact / Aide

NSLC Cannabis MY STORE SIGN IN MY CART (0)

PRODUCTS DISCOVER ABOUT RESPONSIBILITY Search


EXPLORE OUR BESTSELLING PRODUCTS

Your favourite flower, edibles, vapes, and more.

[SHOP NOW](#)

SHOP BESTSELLING PRODUCTS

[View All Products](#)




Reef Organic Watermelon THC Gummy

Sativa Dominant
THC: 5mg/piece | CBD: 0mg/piece

starting at **\$6.99**

[VIEW DETAILS](#)

[Add to My List](#)




EastCann Mango Sour

Sativa Dominant
THC: 270-330mg/g | CBD: 0-10mg/g

starting at **\$9.99**

[VIEW DETAILS](#)

[Add to My List](#)




Skosha Crab Cakes Pre Roll

Sativa Dominant
THC: 280-310mg/g | CBD: 0-10mg/g

starting at **\$11.99**

[VIEW DETAILS](#)

[Add to My List](#)



Spinach Blueberry Dynamite 510 Vape Cartridge

Indica Dominant
THC: 776-824mg/g | CBD: 0-100mg/g

starting at **\$44.99**

[VIEW DETAILS](#)

[Add to My List](#)



CA94

44600

CONFIDENCE



RIGHT
PRODUCT



RIGHT
CONDITIONS



Safety



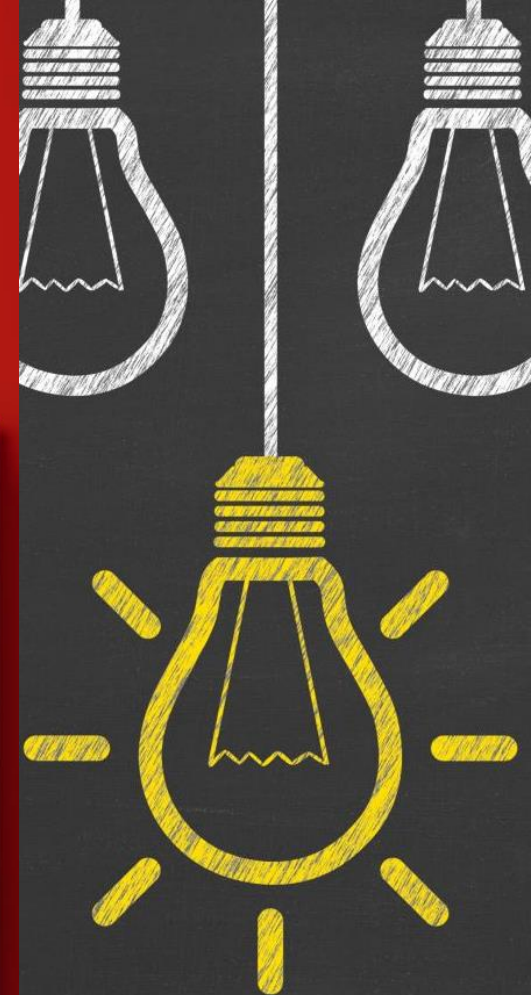
Inclusion



Responsibility



Connection



Efficiency



PEOPLE

1. Focus on our shoppers
2. Build the capability of our teams

PLACE

1. Find vs. Discover
2. Training, tools & support for our shopper-facing teams



PROCESS

1. Simplify our processes
2. Leverage technology





Care for the Team



Create Shopper Value



Win In-store



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Pius Walker
Category Director



Chrissy Leonard
Director Insights & Strategy

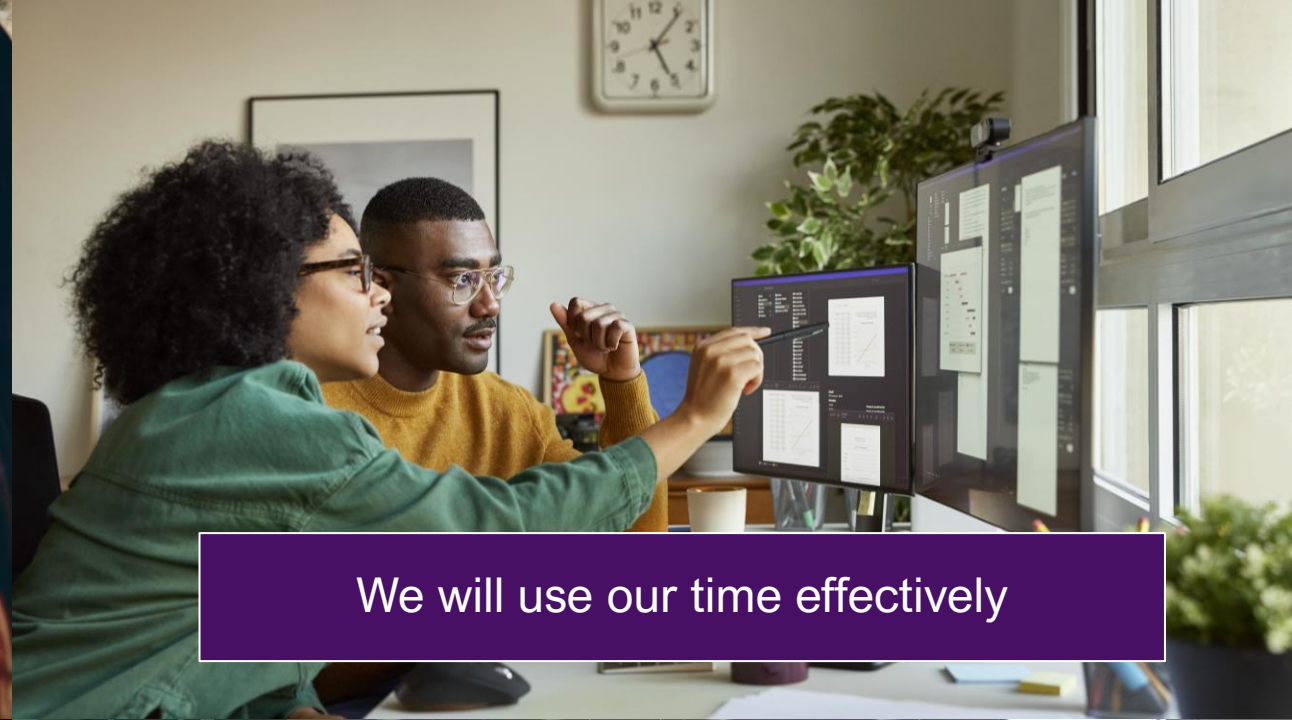


Chantelle Percival
*Director Marketing,
Promotions, & In Store
Experience*





We will be focused on clear expectations and communication



We will use our time effectively



We will be focused and open to giving and receiving feedback



We will focus on driving consistency and predictability



CREATE SHOPPER VALUE





Connect Our Shopper Data & Insights In New Ways

AIR MILES®

Reinvigorated AIRMILES® Partnership



Category Strategy for Short, Medium & Long Term



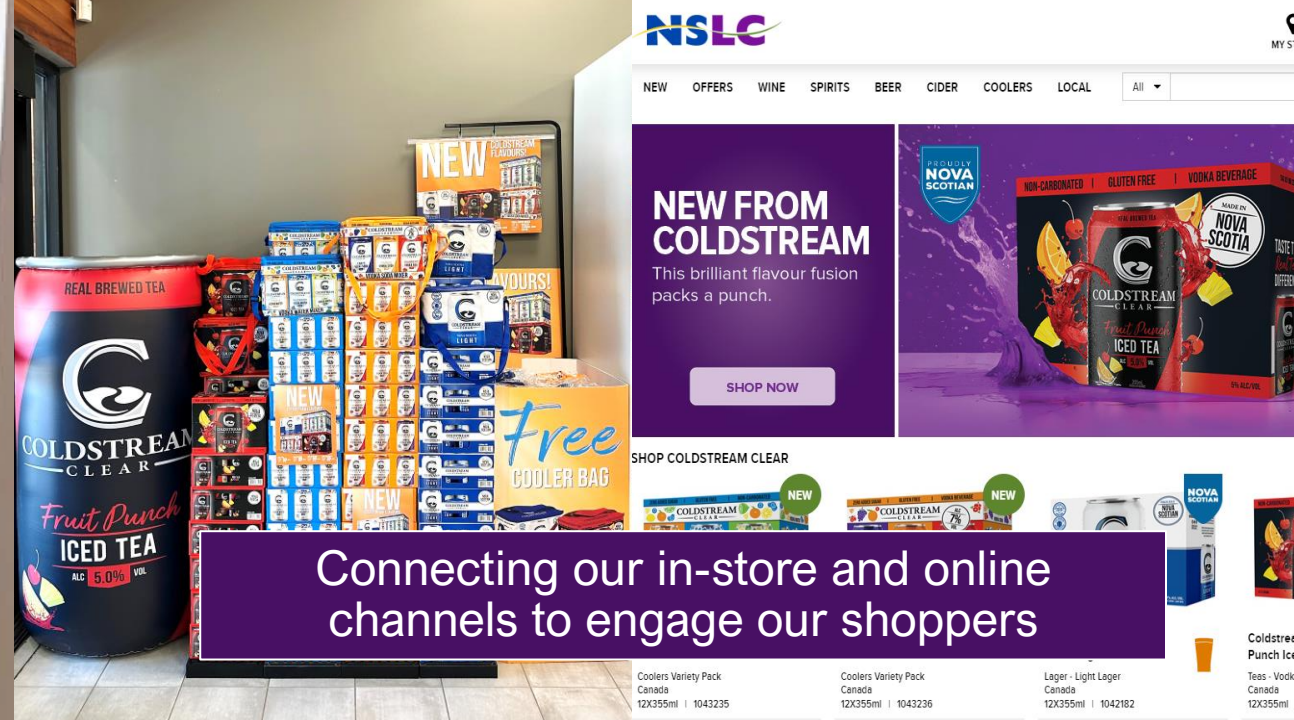
Continue to Improve Access to Products Nova Scotians Love



WIN IN-STORE



Driving alignment, coordination, and prioritization across the business



Connecting our in-store and online channels to engage our shoppers

What are you willing to miss?



Don't drive impaired.



Build our reputation as a responsible steward and employer of choice



Deliver seamless execution in partnership with our supplier community

NSLC

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to Meet the Needs
of Nova Scotians**



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AIRMILES®



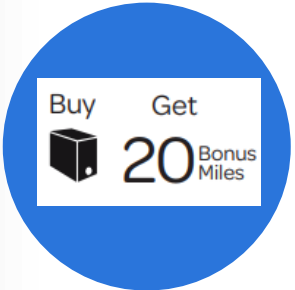
Interaction Data



Repeat Rate vs Average



Demographics



Promo Effectiveness



Collector Churn

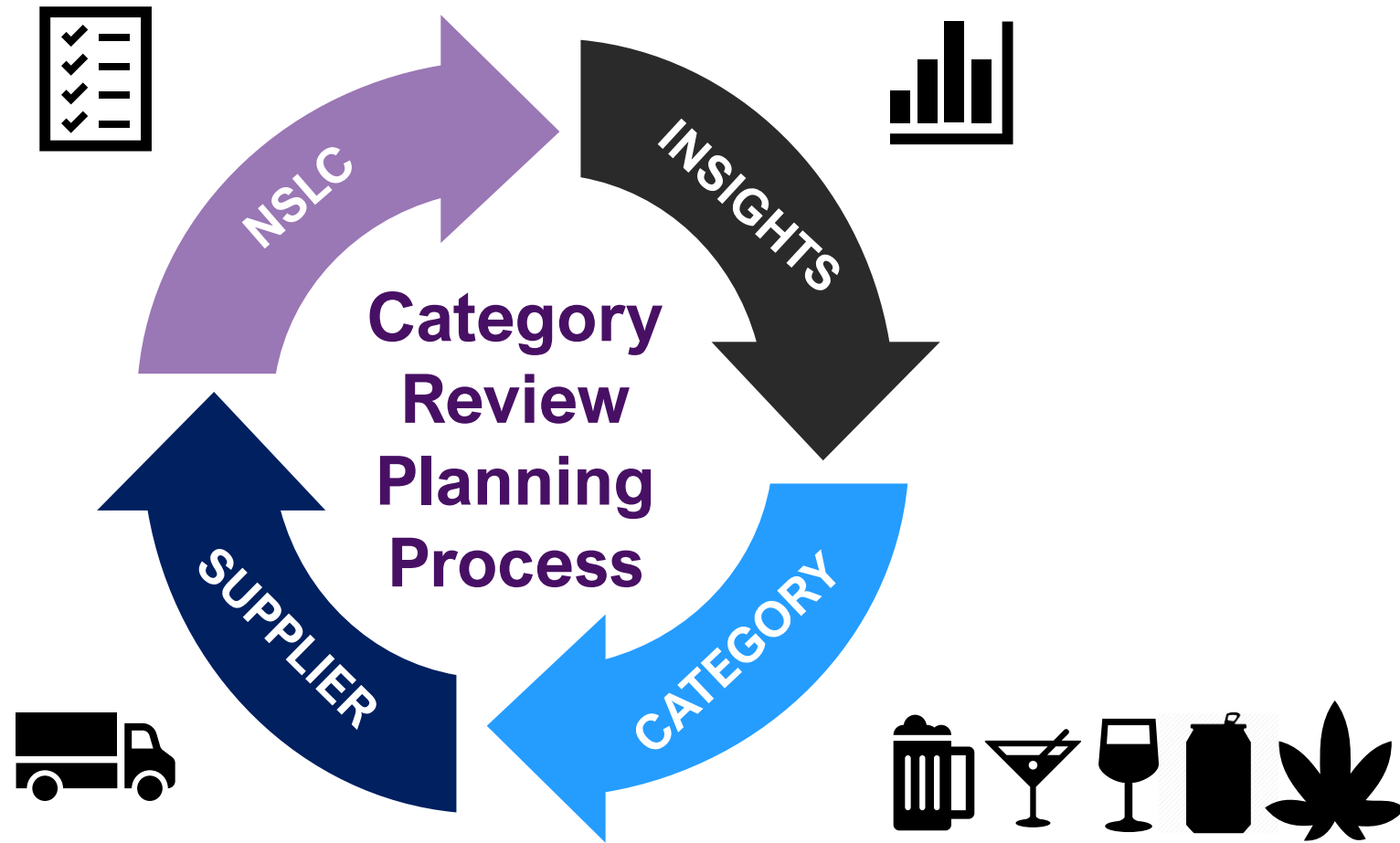


Bulk Buy-In



**PLANNING TOGETHER WITH
OUR CATEGORY TEAMS**

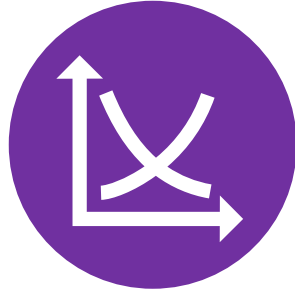
CATEGORY AND INSIGHTS PLANNING PROCESS



CATEGORY REVIEW INSIGHTS



**Category
Sales/Volume Trend**



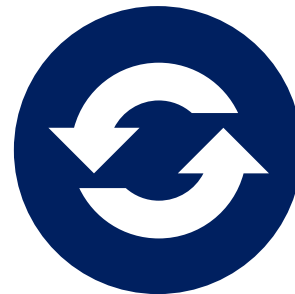
**SKU Sales/Volume
Trend vs Category**



Assortment



**3YR
CAGR**



**Repeat Rate vs
Average**



Subcategory Rank



Jenna Briggs
Category Manager
Refreshment



Michelle Bavis
Category Manager
Wine & Spirits

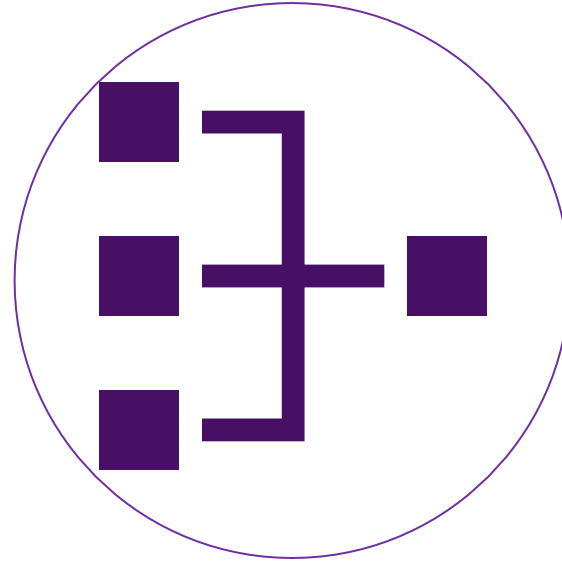
CATEGORY REVIEW PROCESS OVERVIEW



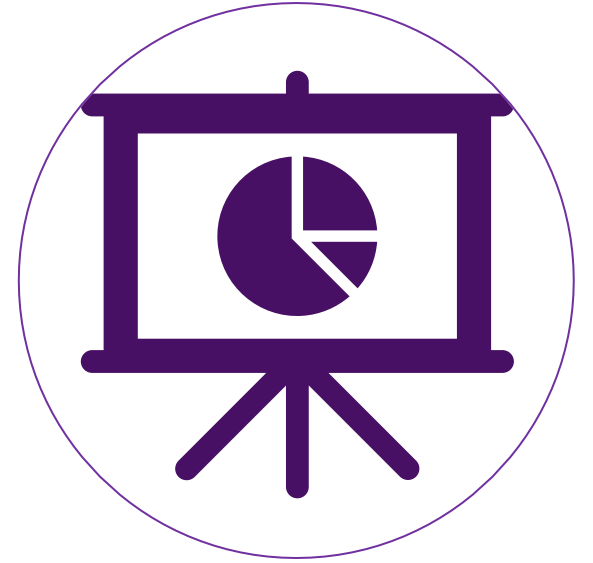
Data & Insights



NSLC Issues EOI



Review Process



Announce Results & Launch

LISTING CONSIDERATIONS



**Shopper & Category
Trends**

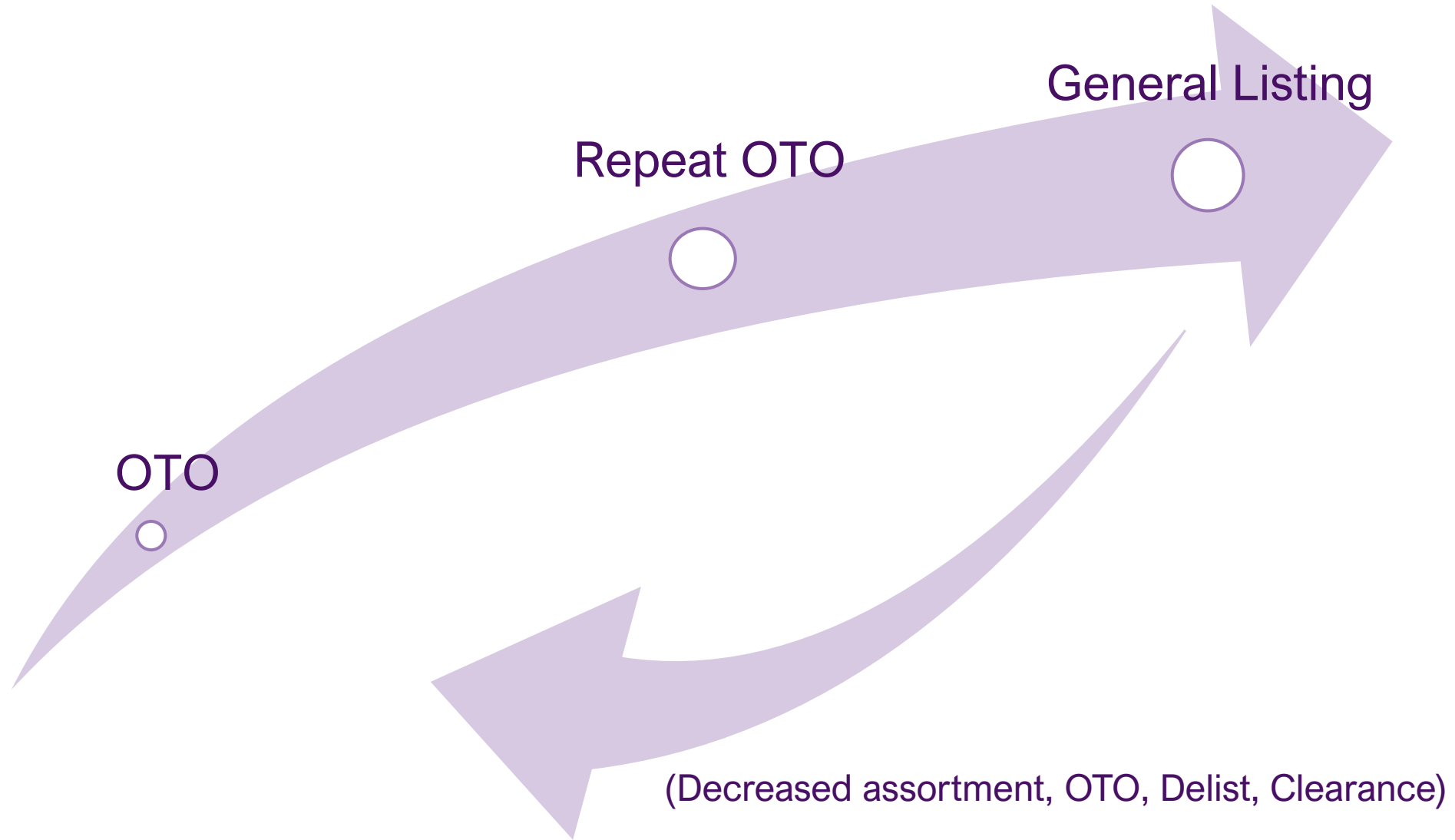


Innovation



**Products Nova Scotians
Love (Or Will Love)**

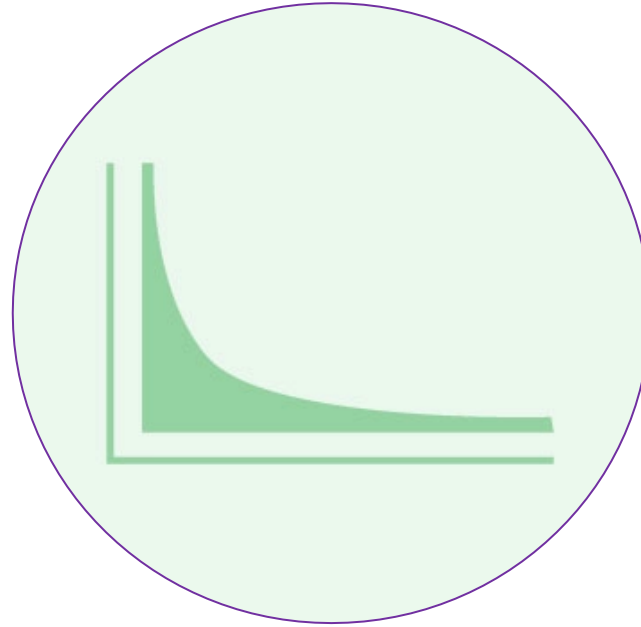
PRODUCT ENTRY & EXIT: PATH TO MARKET



DE-LISTING CONSIDERATIONS



Our Shared Shopper



Article Performance



Sub-Category Trends

It is not one factor, it's a combination of factors & timing.

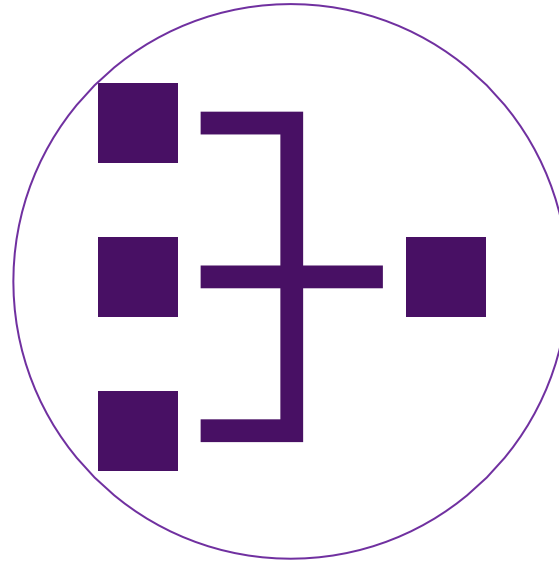


**CATEGORY PRIORITIES &
PLANNING TOGETHER**

BEVERAGE ALCOHOL – PLANNING TOGETHER



Refine



Optimize



Focus



MERCHANDISING



ASSORTMENT



PRICE



SHELF

MERCHANDISING



New, Local, Popular Picks



Key Selling Periods



Hero Program

ASSORTMENT



Refine Choice



Optimize Selection



Focus on Value

PRICING



Refining Price Bands



Premiumization



Creating Shopper Value

SHELF



Showcase Products



Display by Sub-Category



Scalable Elements

BEVERAGE ALCOHOL – PLANNING TOGETHER



Come
Prepared



Ask
Questions



Share
Information



THANK YOU



Jenna

*Category Manager
Refreshment*

*Jenna.Briggs@mynslc.com
902-450-5841*



Michelle

*Category Manager
Wine & Spirits*

*Michelle.Bavis@mynslc.com
902-450-5888*



Karen Skerry
Manager, Agency Network



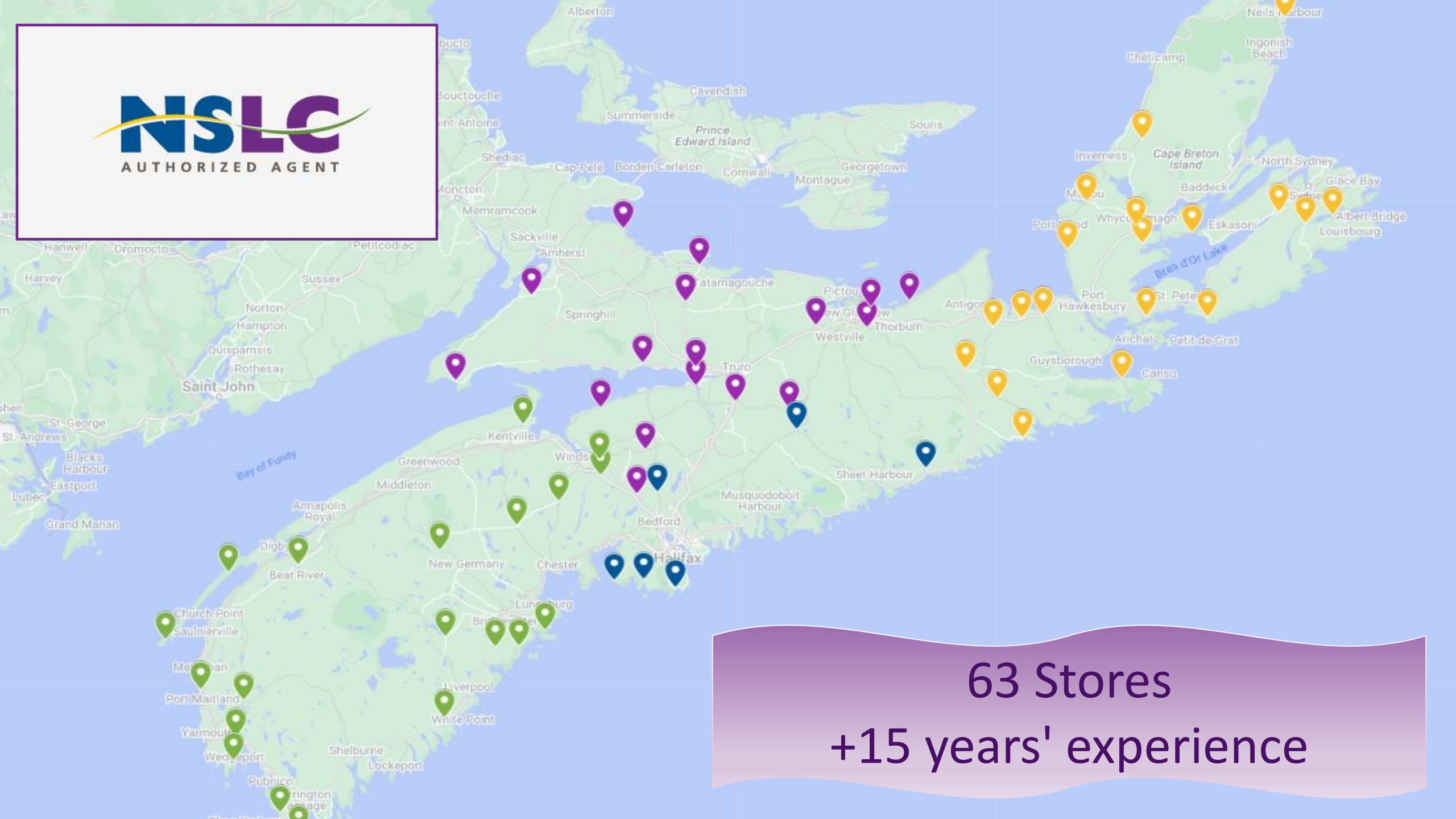
Kat Gourley

*Agency Store Network
Advisor*



Tracy Anderson

Service Excellence Coordinator



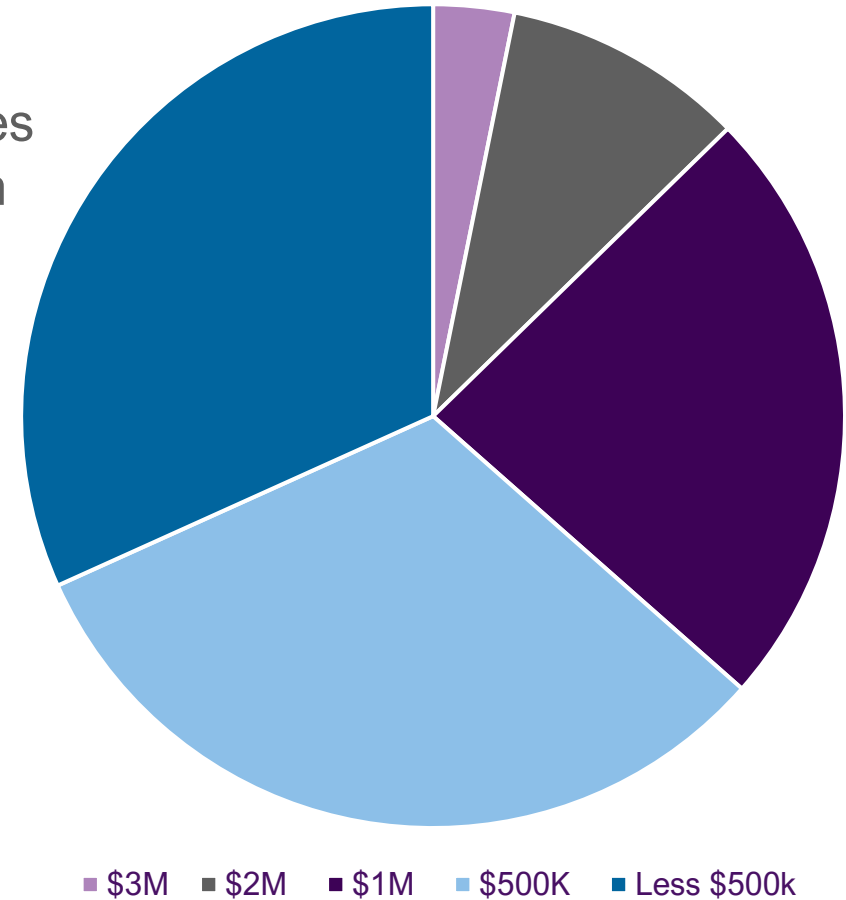
63 Stores
+15 years' experience

AGENCY NETWORK

The Agency network's purpose is to provide improved access to the public for beverage alcohol in communities which cannot support a Nova Scotia Liquor Corporation retail store

- Rural communities within the province
- Min distance of 10kms from another NSLC location

Agency Store Sales



HOW WE CAN SUPPORT YOU



Agency Stores Encouraged to Highlight New & Promotional Products



Opportunity For Agency Specific Shopper Incentives



Available For Shopper Tastings



Some Reporting Available



Sharing of Sell Sheets

WAYS TO WIN IN THE AGENCY ENVIRONMENT

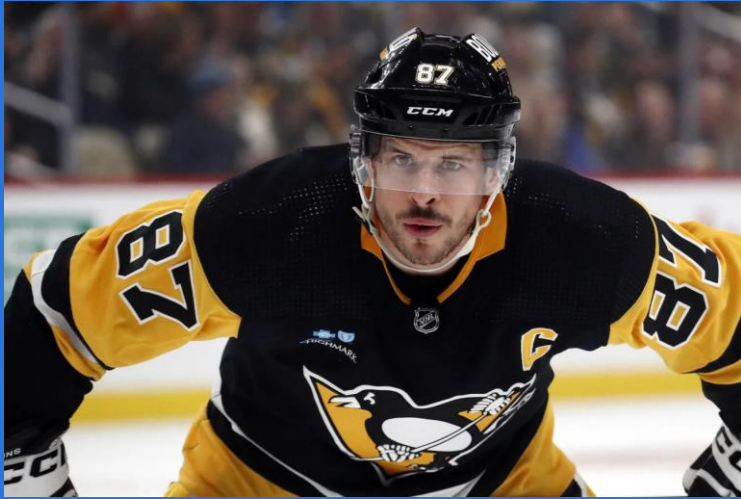


AIR MILES®

**NSLC &
AIR MILES**

June 2024

Who is the most famous person in Nova Scotia?



Sid



Nate



Trailer Park Boys

“
**More Nova Scotians redeem AIR MILES
for **Super Mario** bundles
than Crosby jerseys**
”





Data is what shoppers do, could do, and want to do.



Meet our team!



Chris Wragg

Vice President, Strategic
Partnerships

*Came up in retail marketing
including SportChek & Bass Pro*



Lauren Scharf

Director, Strategic
Partnerships

*Cut teeth at Molson Coors
then Tim Hortons CPG*



Patrick Durling

Manager, Strategic
Partnerships

*Proud Nova Scotian with CPG
vendor experience working with
brands like Walmart & Sobeys*

Nova Scotians care about AIR MILES

120M

**MILES ISSUED
ANNUALLY IN
NOVA SCOTIA**

77%

**NOVA SCOTIAN
HOUSEHOLDS
USE**

300+

PARTNERS

30+

YEARS OF DATA

AIR MILES drives (a lot!) of sales at the NSLC

53%

**NSLC Sales
Penetration**

+0.7pp Month
over Month

18K

**Card Scans
per Day**

36%

**Average
Basket Lift**

+41% Spirits
+39% Beer
+36% RTD
+27% Wine

32%

**Litres per
Transaction**

NSLC & AIR MILES have teamed up to invest even more in shoppers

NEW 1 Mile Per \$20 Spent

- Was 1 Mile per \$30 spent
- Unlocked new pack sizes like single serve beer & wine

5% Value Back

- NSLC is one of the only liquor boards in Canada to give 5% value back to its shoppers

\$200K+ Marketing Spend

- Both AIR MILES & NSLC are investing heavily in 'painting the stores blue' with POP signage
- AIR MILES is significantly promoting NSLC to all Nova Scotians through TV, radio & billboards



You can use AIR MILES data to grow shopper loyalty and cases sold

13%

More units per transaction with AIR MILES shoppers

48%

of SKUs show high incremental lift with AIR MILES offers

79%

of SKUs show high incremental lift with AIR MILES + LTO offers

Every time someone uses their AIR MILES card, NSLC & supplier partners can make better decisions

By being part of Bulk Miles Buy-In program, supplier partners can:

- optimize marketing spend by targeting the right shoppers
- find out who is buying your products
- get basket interaction data (Silver & Gold tiers)



NSLC & AIR MILES are all in on making the program work for everyone

So, what's next?

- Buy into the Bulk Miles Buy-in program for a reduced rate & learn more about your shoppers
- Re-engage in the program focusing on offers & programming that resonates with our shared shoppers
- Help us help you: work with your Category Managers to understand how AIR MILES can support your business!



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