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CINE METU

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YEAR 2011



JAMESON
IRISH WHISKEY

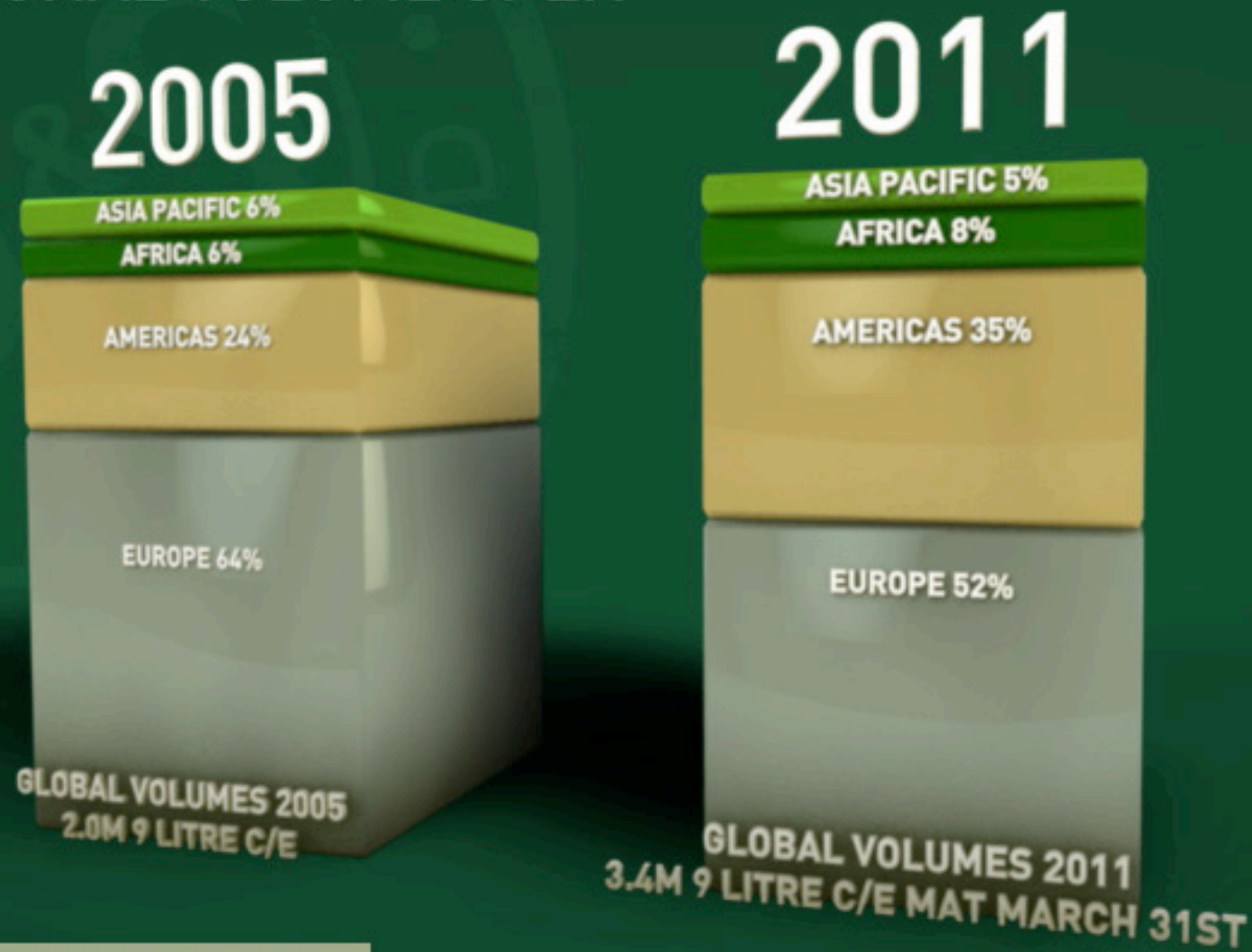
AGENDA

1. Global Growth
2. US Success Factors
3. Jameson Marketing Strategy
4. The Future



JAMESON
IRISH WHISKEY

AN INCREASINGLY GLOBAL BRAND REGIONAL VOLUME SPLIT

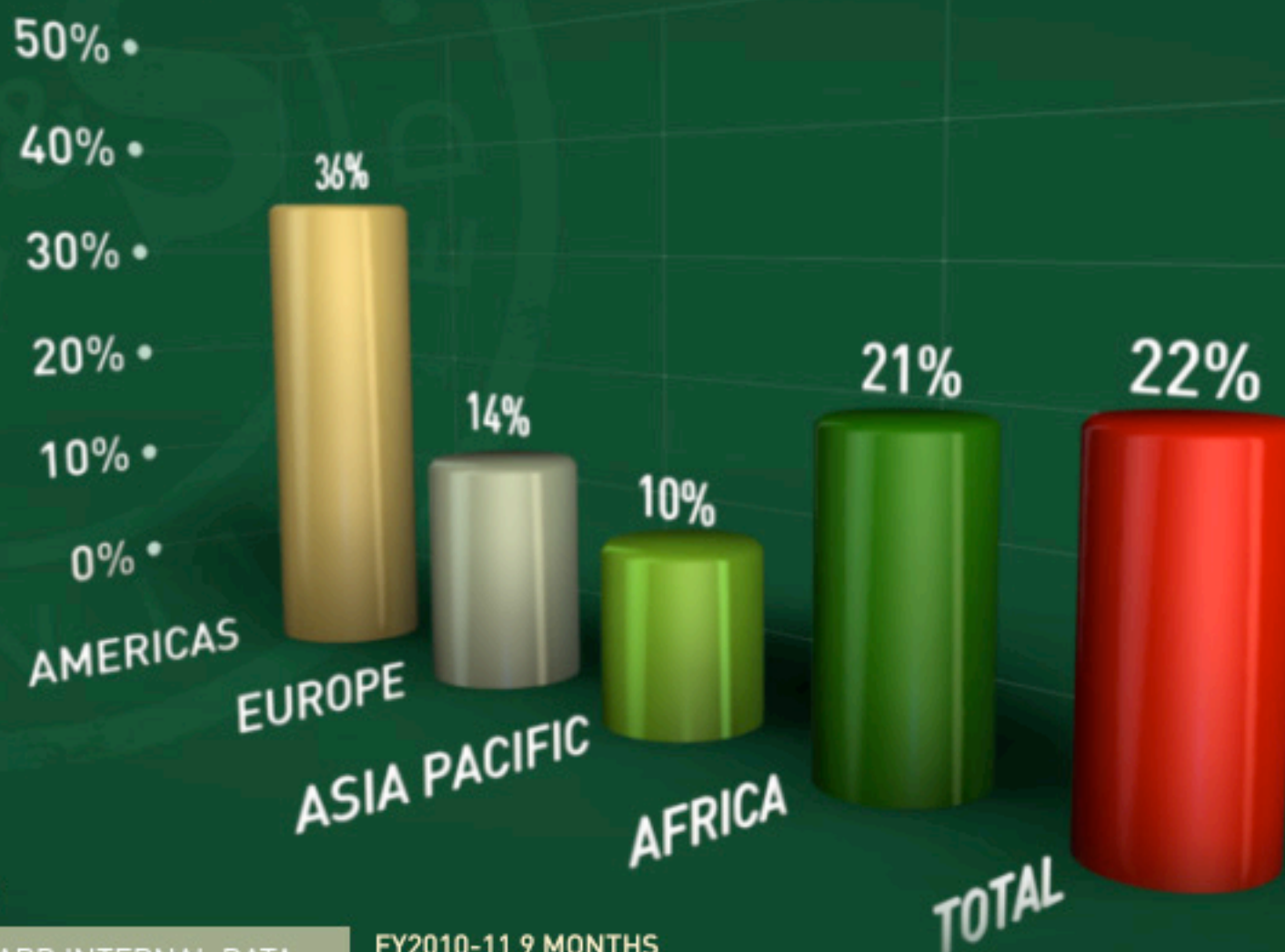


SOURCE - PERNOD RICARD INTERNAL DATA



JAMESON
IRISH WHISKEY

WITH GLOBAL MOMENTUM NET SALES PERFORMANCE*



*Organic Growth

SOURCE - PERNOD RICARD INTERNAL DATA

FY2010-11 9 MONTHS
ENDING 31ST MARCH 2011



JAMESON
IRISH WHISKEY

A STRONG GEOGRAPHIC SPREAD

TOP 10 MARKETS

1. USA
2. TRAVEL RETAIL
3. IRELAND
4. UK
5. FRANCE
6. SOUTH AFRICA
7. RUSSIA
8. PORTUGAL
9. SPAIN
10. AUSTRALIA



SOURCE - PERNOD RICARD INTERNAL DATA



JAMESON
IRISH WHISKEY

WHAT HAS MADE JAMESON A SUCCESS IN THE USA?



JAMESON
IRISH WHISKEY

THE JAMESON USA SUCCESS INDUSTRY ENDORSEMENT

- Impact Hot brand for 10 Years in a row
- Advertising Age 'One of America's Hottest Brands'
- Marketwatch, Spirits brand of the Year 2010
"This year's Spirit's Brand of the Year is a brand that simply put, built a category."



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IRISH WHISKEY

JAMESON USA – ACCELERATING VOLUME GROWTH

(000'S 9 LITRE C/E'S)



SOURCE: IWSR & PERNOD RICARD INTERNAL DATA



JAMESON
IRISH WHISKEY

TOWARDS NATIONAL BRAND STATUS

1 MILLION C/E - FROM COAST TO COAST



SOURCE - PERNOD RICARD INTERNAL DATA

WHOLESALE DEPLETIONS MAT MARCH 2011,
VOLS IN 9 LITRE C/E'S



JAMESON
IRISH WHISKEY

TOWARDS NATIONAL BRAND STATUS

50 STATES IN DOUBLE DIGIT GROWTH



SOURCE - PERNOD RICARD INTERNAL DATA

WHOLESALE % GROWTH
MAT MARCH 2011



JAMESON
IRISH WHISKEY

BRAND HEALTH CHECK

1 - CHANNEL PERFORMANCE



2 - ON-PREMISE PERFORMANCE



3 - SKU MIX



4 - DISTRIBUTION Vs. VELOCITY



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IRISH WHISKEY

BRAND HEALTH CHECK CHANNEL MIX



On/Off SPLIT
2005

347K C/E



1.1M C/E

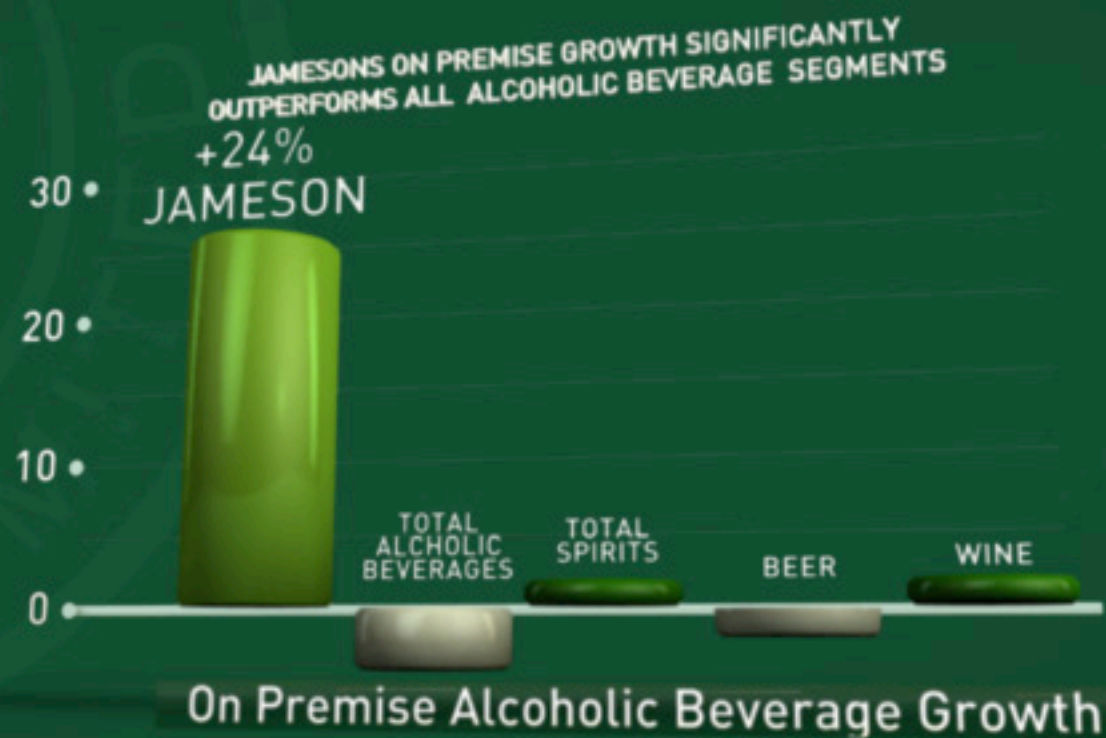
On/Off SPLIT
2011

SOURCE - PERNOD RICARD INTERNAL DATA



JAMESON
IRISH WHISKEY

BRAND HEALTH CHECK ON PREMISE PERFORMANCE

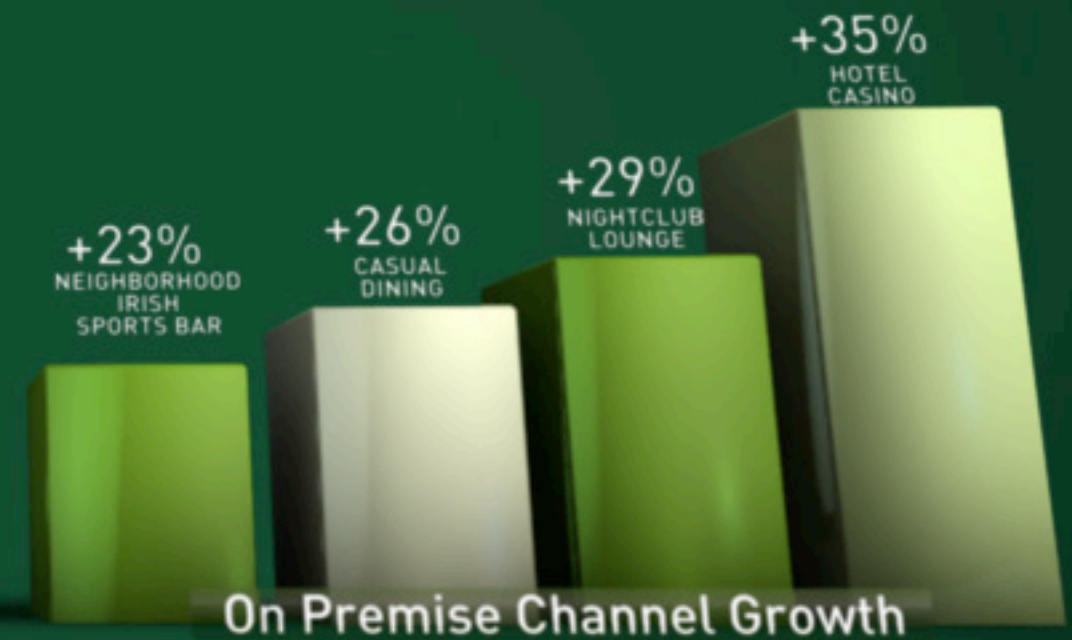


SOURCE: BEVERAGE INFORMATION GROUP FOR 2010 (ADVANCE 2011)



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IRISH WHISKEY

BRAND HEALTH CHECK ON PREMISE PERFORMANCE



SOURCE: BEVERAGE INFORMATION GROUP FOR 2010 (ADVANCE 2011)

SOURCE: JAMESON DEPLETIONS - PRUSA DATA DEC 2010



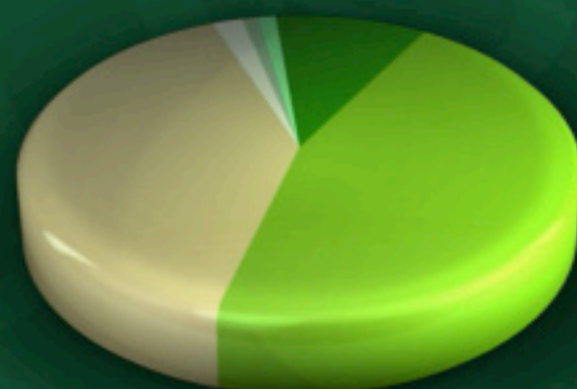
JAMESON
IRISH WHISKEY

BRAND HEALTH CHECK

SKU MIX



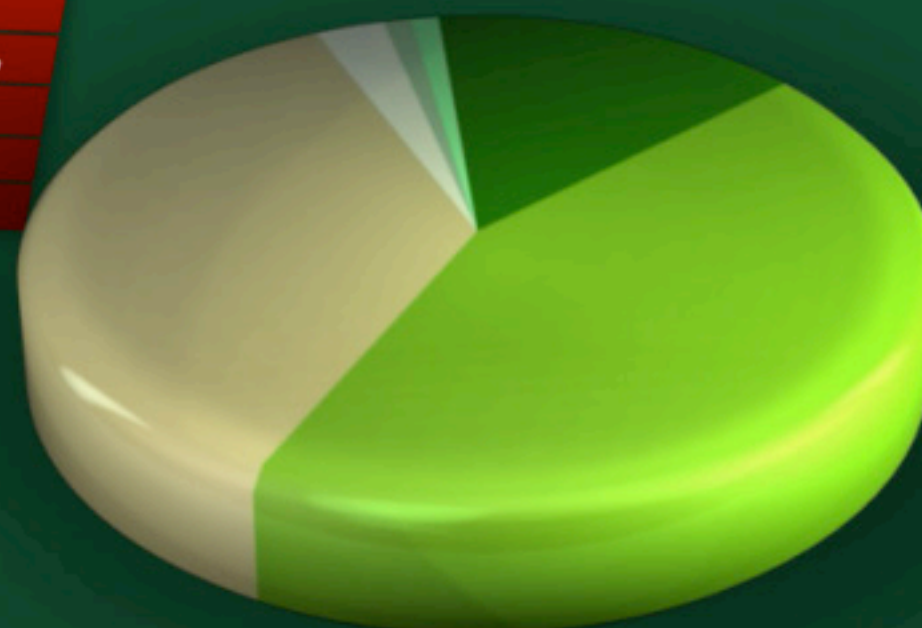
SKU 2006



US VOLUMES 2006
420K C/E 9LITRE C/E

1.75L	10%
1L	46%
750ML	40%
375ML	2%
200ML	1%
50ML	1%

SKU 2011



US VOLUMES 2011
1.1M 9LITRE C/E
MAT MARCH 31ST

1.75L	15%
1L	44%
750ML	36%
375ML	3%
200ML	1%
50ML	1%

SOURCE - PERNOD RICARD INTERNAL DATA



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IRISH WHISKEY

BRAND HEALTH CHECK

DISTRIBUTION VS. VELOCITY



DEPLETIONS

22% ON PREMISE
+23% OFF PREMISE

'06-'11 CAGR

DISTRIBUTION

6% ON PREMISE
7% OFF PREMISE

'06-'11 CAGR

VELOCITY

15% ON PREMISE
15% OFF PREMISE

'06-'11 CAGR

SOURCE - PERNOD RICARD INTERNAL DATA

DISTRIBUTION	FY07 - FY09 VELOCITY CAGR
> 80%	22%
50 - 80%	16%
< 50%	15%



JAMESON
IRISH WHISKEY

BRAND HEALTH CHECK

1 - CHANNEL PERFORMANCE



2 - ON-PREMISE PERFORMANCE



3 - SKU MIX



4 - DISTRIBUTION Vs. VELOCITY



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS

The Brand



TASTE

TRIPLE DISTILLED
IRISH POT STILL
& GRAIN BLEND



IRISH

IRISH HERITAGE



CONNECT

CAMARADERIE /
CONNECTEDNESS



EDGE

UNDERSTATED
RELAXED
STYLE / EDGE

The People



ADVOCACY

ADVOCACY / BARTENDERS /
PR SALES / DISTRIBUTOR
TEAMS



PRUSA

GROWTH OF
PRUSA

The Strategy



STRATEGY

MARKETING
STRATEGY



\$\$\$

PRICING
STRATEGY



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS

TASTE



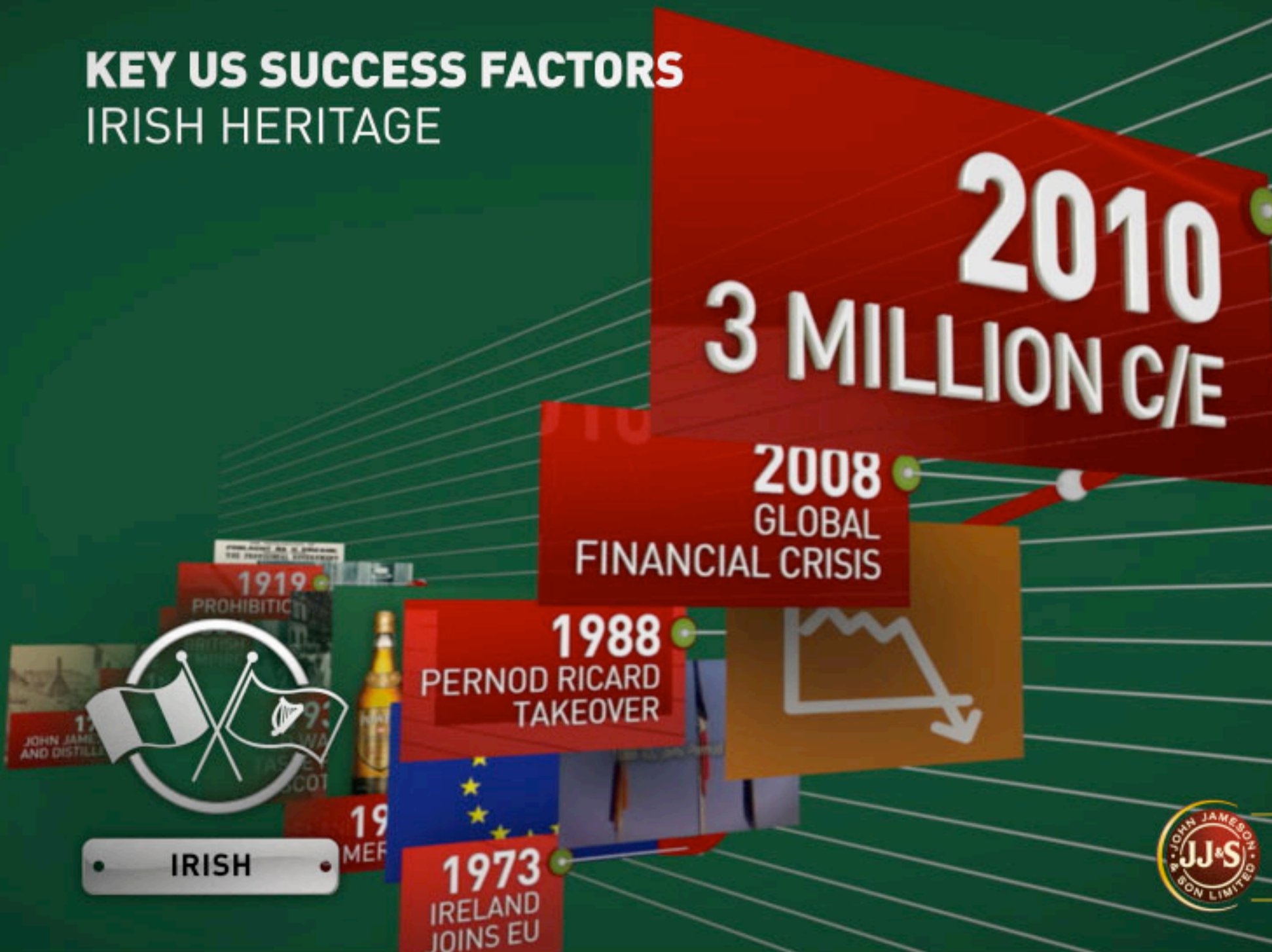
TASTE



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS

IRISH HERITAGE



KEY US SUCCESS FACTORS

CAMARADERIE



• CONNECT •



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS

UNDERSTATED EDGE



EDGE



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS

UNDERSTATED EDGE

Total USA Drinking Population
LDA-34 yrs
= 36m (+6% by 2020)



EDGE



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS

UNDERSTATED EDGE



EDGE



Total USA Drinking Population
LDA-34 yrs
= 36m (+6% by 2020)

29% of these are
'Ambitious Socials' = 10m



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS

UNDERSTATED EDGE



EDGE



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS

UNDERSTATED EDGE



EDGE

DISCERNING
URBAN
DISCOVERERS
EXPERIENCERS

Total USA Drinking Population
LDA-34 yrs
= 36m (+6% by 2020)

29% of these are
'Ambitious Socials' = 10m

Jameson Advocates
Doubled in last two
years to over 1.1m



JAMESON
IRISH WHISKEY

Jameson – Part Of Popular Culture



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS

The People



• **ADVOCACY** •

ADVOCACY / BARTENDERS /
PR SALES / DISTRIBUTOR
TEAMS



• **PRUSA** •

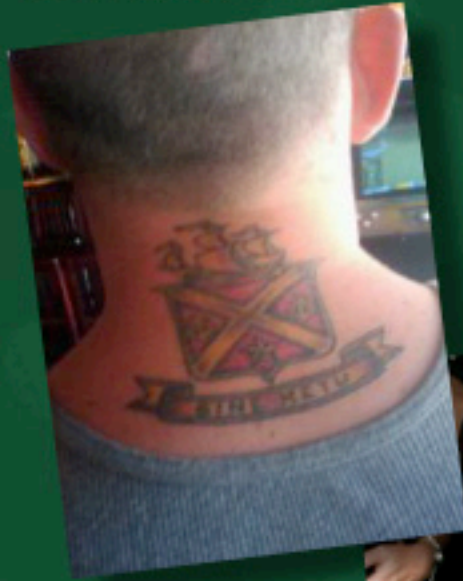
GROWTH OF
PRUSA



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS

ADVOCACY



• ADVOCACY •



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS

GROWTH OF PRUSA



• PRUSA •



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS - GROWTH OF PRUSA

ROUTE TO MARKET

 SOUTHERN WINE & SPIRITS

 RNDC

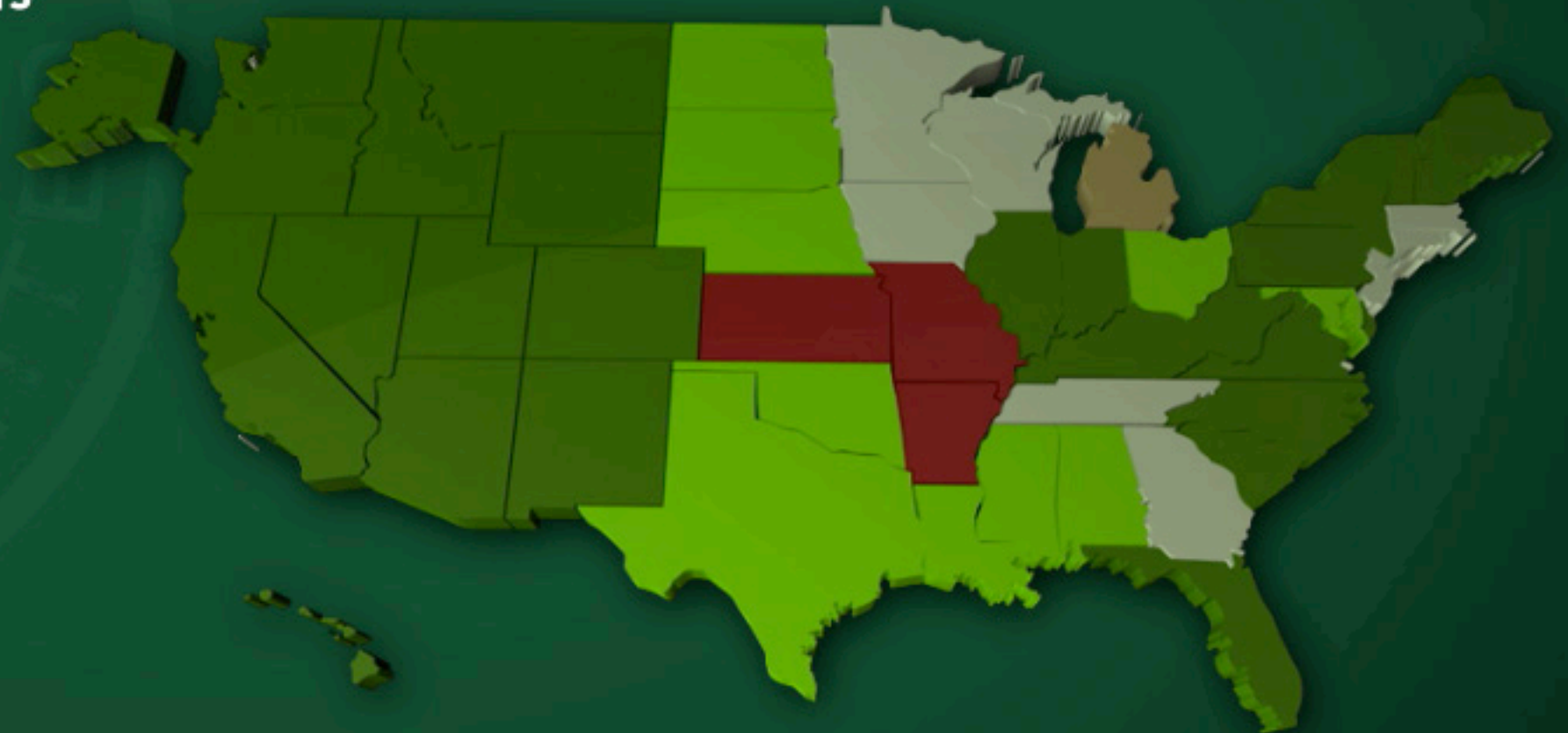
 NATIONAL WINES
AND SPIRITS (NWS)

 GLAZER COMPANIES

OPEN 77%
CONTROL 23%



• PRUSA •



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS - GROWTH OF PRUSA

FOCUS CITIES



PRUSA



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS - GROWTH OF PRUSA

FOCUS CITIES



PRUSA



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS - GROWTH OF PRUSA

FOCUS CITIES



PRUSA



JAMESON
IRISH WHISKEY

JAMESON USA – ACCELERATING VOLUME GROWTH

(000'S 9 LITRE C/E'S)



PRUSA



SOURCE - PERNOD RICARD INTERNAL DATA



JAMESON
IRISH WHISKEY

JAMESON USA – ACCELERATING VOLUME GROWTH

(000'S 9 LITRE C/E'S)



PRUSA



SOURCE - PERNOD RICARD INTERNAL DATA



JAMESON
IRISH WHISKEY

JAMESON USA – ACCELERATING VOLUME GROWTH

(000'S 9 LITRE C/E'S)



PRUSA



SOURCE - PERNOD RICARD INTERNAL DATA



JAMESON
IRISH WHISKEY

JAMESON USA – ACCELERATING VOLUME GROWTH

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PRUSA



SOURCE - PERNOD RICARD INTERNAL DATA



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS - MARKETING STRATEGY

GROWTH IN A&P & MEDIA INVESTMENT



• STRATEGY •

SOURCE - PERNOD RICARD INTERNAL DATA



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS - MARKETING STRATEGY

5 PILLARS



JAMESON
IRISH WHISKEY

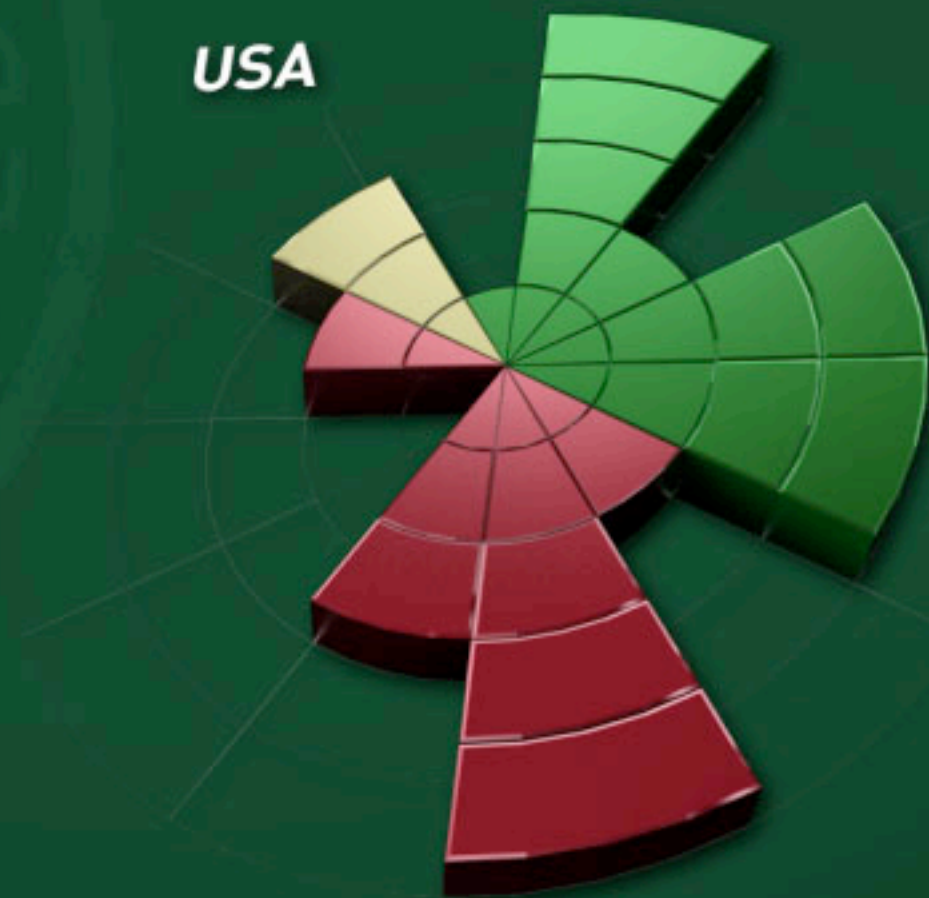
KEY US SUCCESS FACTORS - MARKETING STRATEGY

5 PILLARS – INVESTMENT PROFILE

- **MEDIA**
- **TRADE**
- **OTHER CONSUMER**



• STRATEGY •



	KEY BATTLEGROUND MARKETS
	HEARTLAND MARKETS
	EMERGING BATTLEGROUND MARKETS
	MOMENTUM MARKETS
	NURTURE MARKETS
	SEED MARKETS



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS - MARKETING STRATEGY

CORE COMMS TVC



CORE ATTITUDNAL
COMMUNICATIONS



• STRATEGY •



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS - MARKETING STRATEGY

CORE COMMS TVC



CORE ATTITUDINAL
COMMUNICATIONS

Key Advertising Success Measures (Jan 2011)

Campaign Likeability: 93%

Differentiation: 95%

Persuasion: 89%



• STRATEGY •



"Best Commercial EVER"
HookahMick - 2 Months ago



"It's the best"
Rob Hanlon - About an hour ago

"It's the best thing on TV"
Jim Divine - 2 days ago

"This man could be a Demi-God"
Cheezle - 2 days ago



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS - MARKETING STRATEGY

PRINT



CORE ATTITUDNAL
COMMUNICATIONS



• STRATEGY •



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IRISH WHISKEY

KEY US SUCCESS FACTORS - MARKETING STRATEGY

FILM – INDEPENDENT SPIRIT AWARDS



FILM



STRATEGY



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS - MARKETING STRATEGY

MARCH FOCUS



MARCH FOCUS

GLOBAL BROADCAST



STRATEGY

20 RADIO STATIONS FROM USA
OVER 200 HOURS ON AIR
OVER 26 MILLION LISTENERS

ON-PREMIS



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS - MARKETING STRATEGY

BARTENDER FOCUS



PRODUCT
QUALITY



• STRATEGY •



20 EVENTS NATIONWIDE
2,000 BARTENDERS



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS - MARKETING STRATEGY

RESERVES



RESERVES



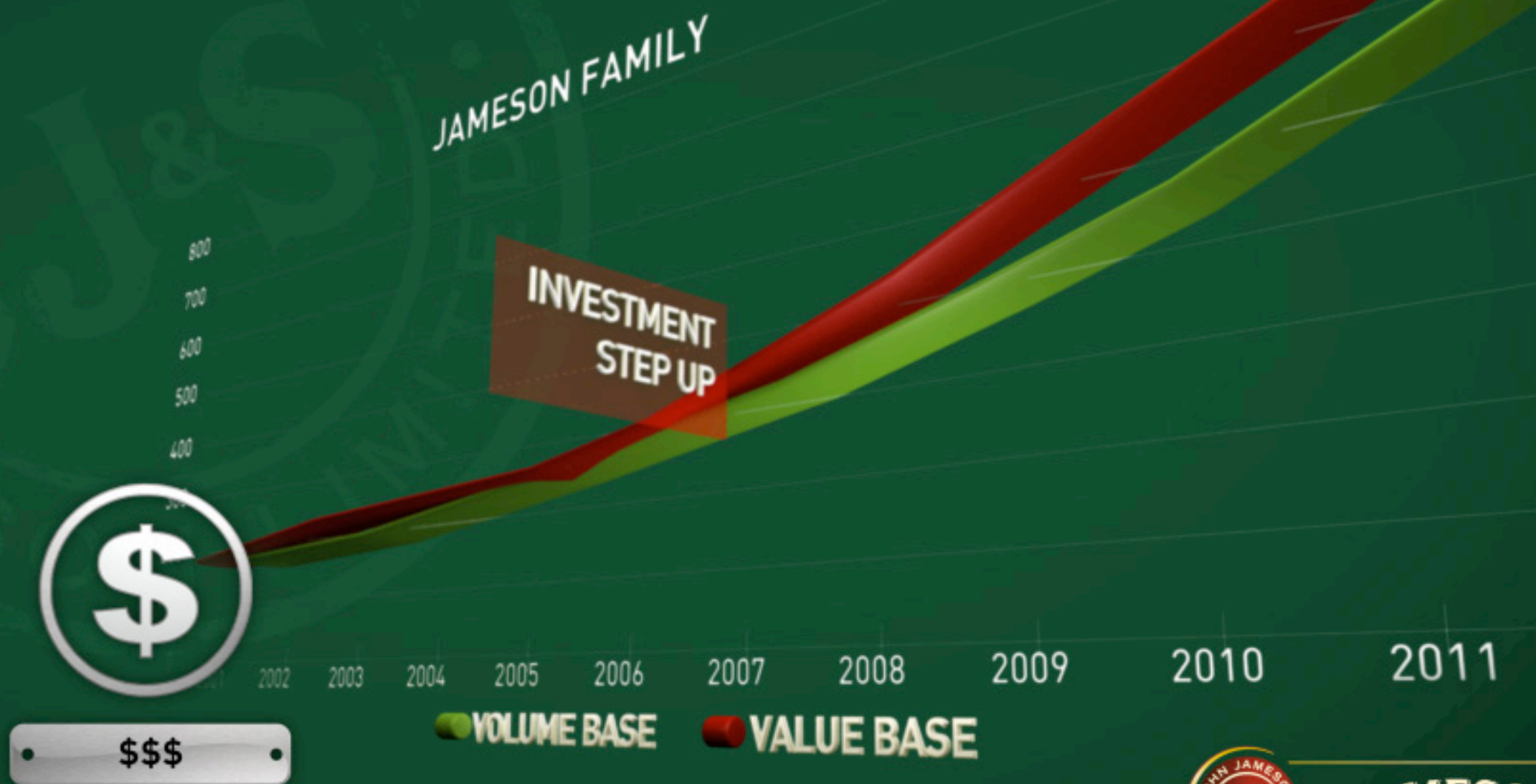
STRATEGY

CAGR 04 – FY'11 18%



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IRISH WHISKEY

VALUE VOLUME GROWTH INDEX



SOURCE - PERNOD RICARD INTERNAL DATA



JAMESON
IRISH WHISKEY

KEY US SUCCESS FACTORS

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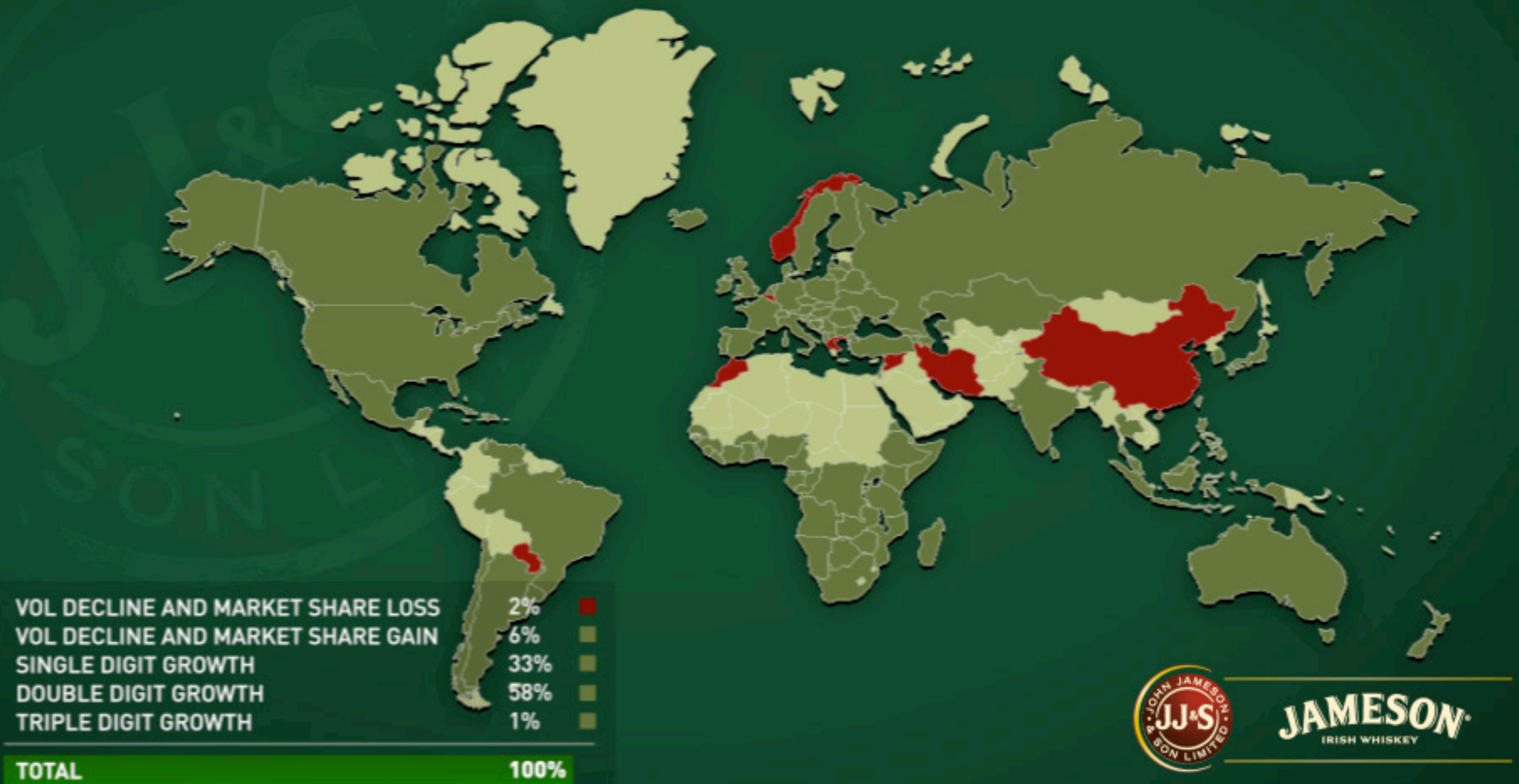
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IRISH WHISKEY

ALIGNMENT OF VALUES



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IRISH WHISKEY

THE FUTURE IS GREEN



Jameson and Pernod Ricard A shared passion to build brands

Looking forward to our next milestone

