

ILLNESS Tracking:

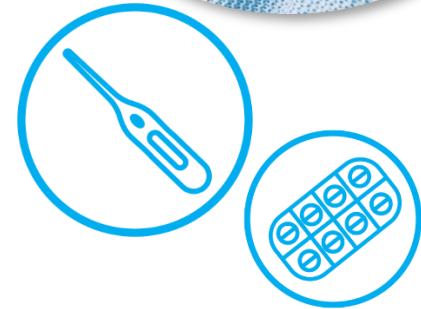
2019 FLU IMPACT VARIES BY MARKET

February 2019



Headlines

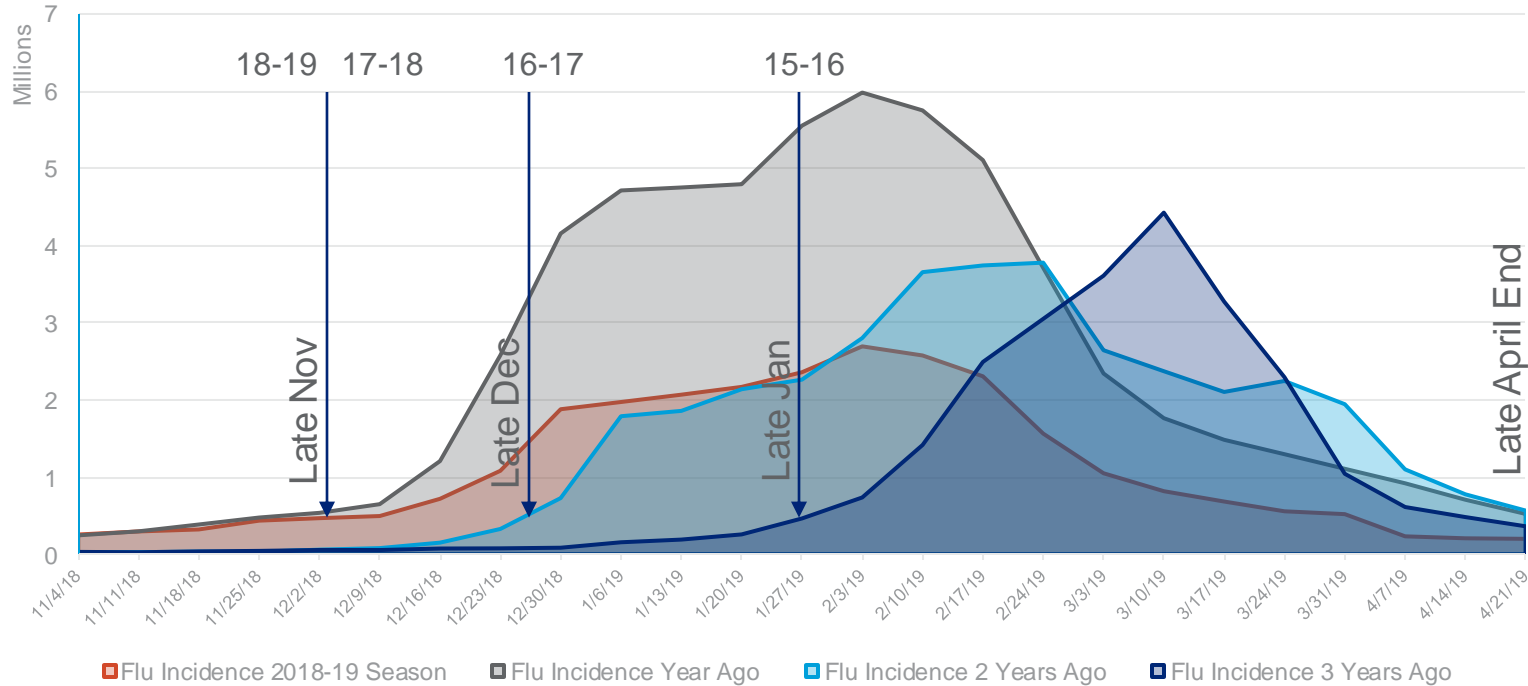
- Most recently, Flu season starting earlier, lasting longer.
- Total U.S. flu incidence down 56.7 percent in 2018-19; but Massachusetts (11.6 percent) and New Hampshire (8.3 percent) are experiencing significant increase in flu incidence.
- Sales of cold/allergy/sinus and cough remedies are down.
- Sales of other health-related products, including personal thermometers and humidifiers are also down.
- 2016 flu peaked in March; season isn't over.



Most Recently, Flu Season Starting Sooner and Lasting Longer

Flu Levels and Trends

Geography: Total US - Multi Outlet



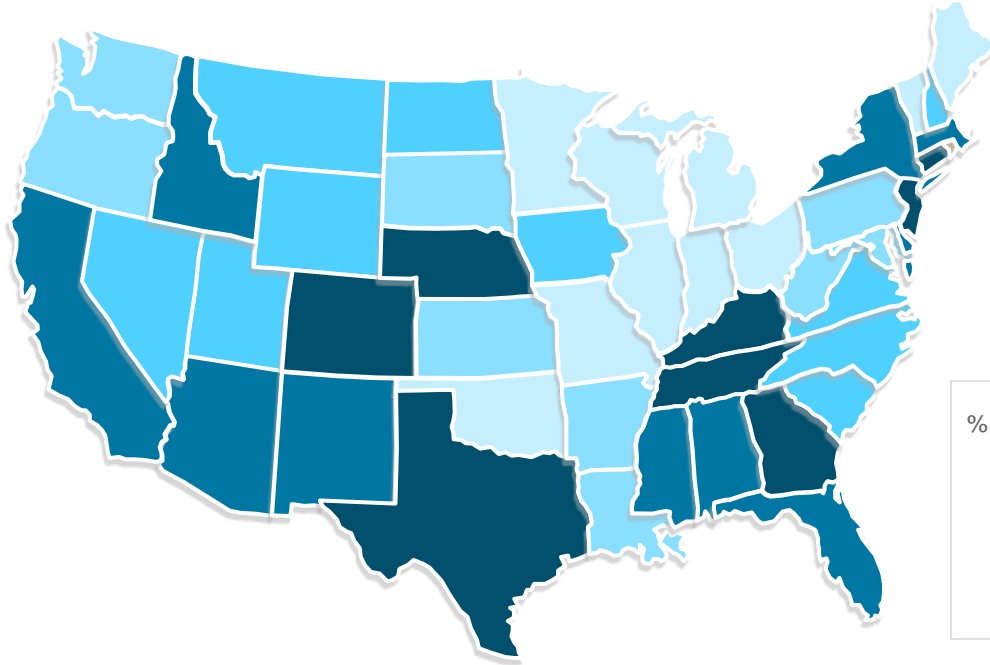
Source: IRI Market Advantage™ Illness Tracking, 2019



U.S. Flu Map Shows Varying Levels of Severity

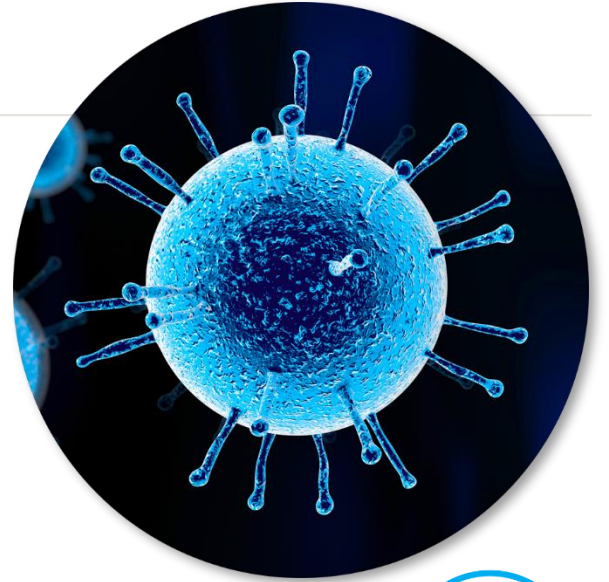
Total U.S. Flu Incidence 2.7%

Time: Latest 8 Weeks Ending 01-27-19



% of Population with Flu

- 0 to 2.18%
- 2.18% to 3.01%
- 3.01% to 3.67%
- 3.67% to 4.15%
- 4.15% to 10.50%

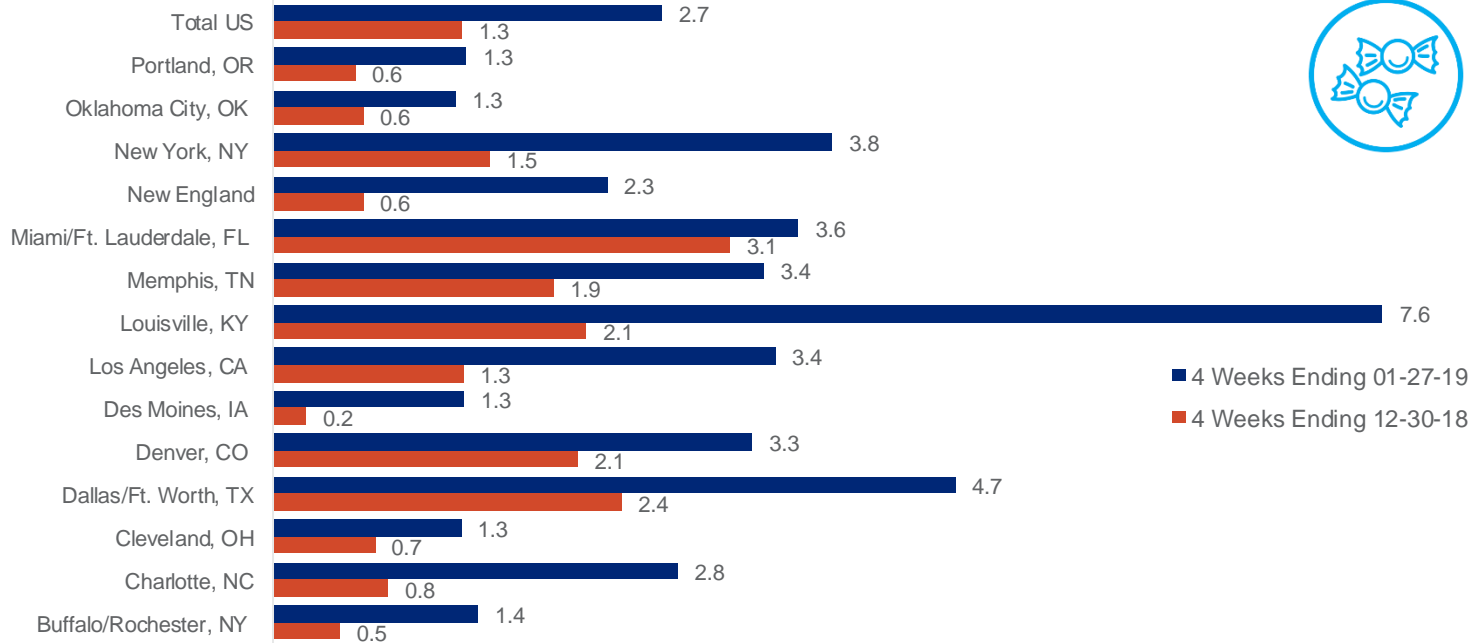


Source: IRI Market Advantage™ Illness Tracking, 2019

The Flu can Take Dramatic Leaps in Just One Month's Time

Flu Prevalence by Market

Percent of Population With Flu

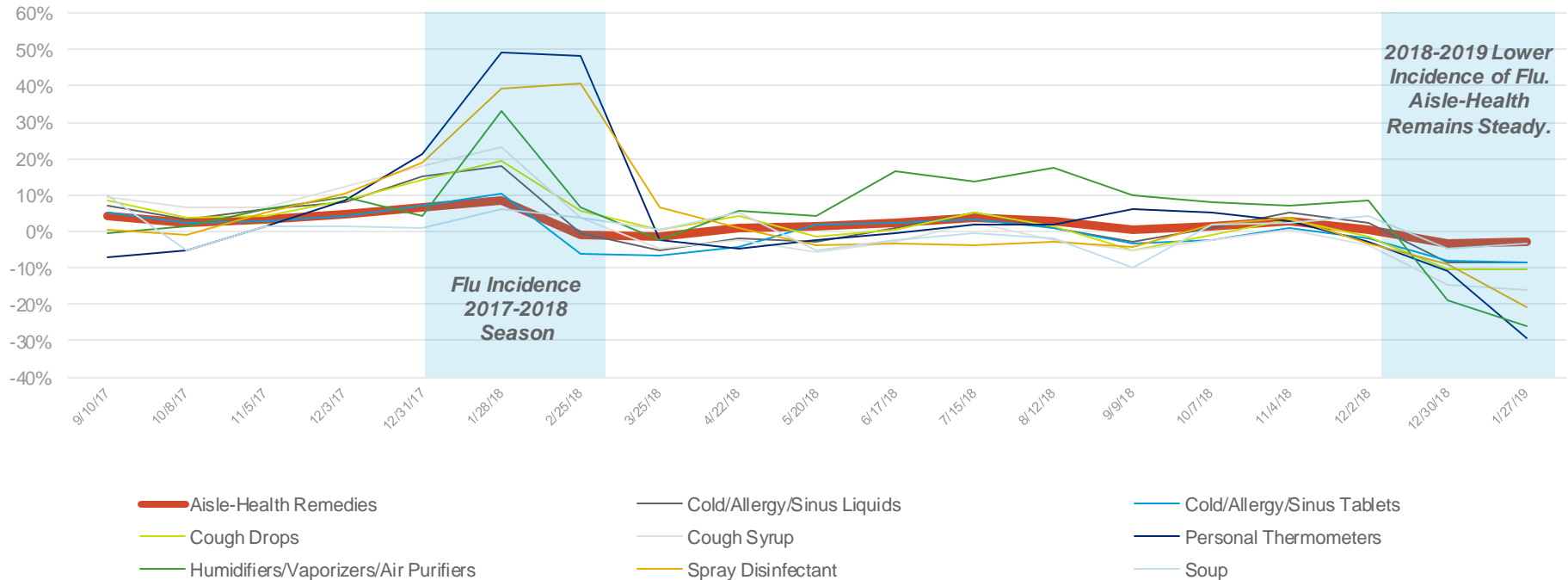


Source: IRI Market Advantage™ Illness Tracking, 2019

Sales of Flu Remedies and Other Associated Products are Down Compared to a Year Ago; Overall Aisle-Health Sales Down Slightly

Sales vs Year Ago

Total US - Multi Outlet



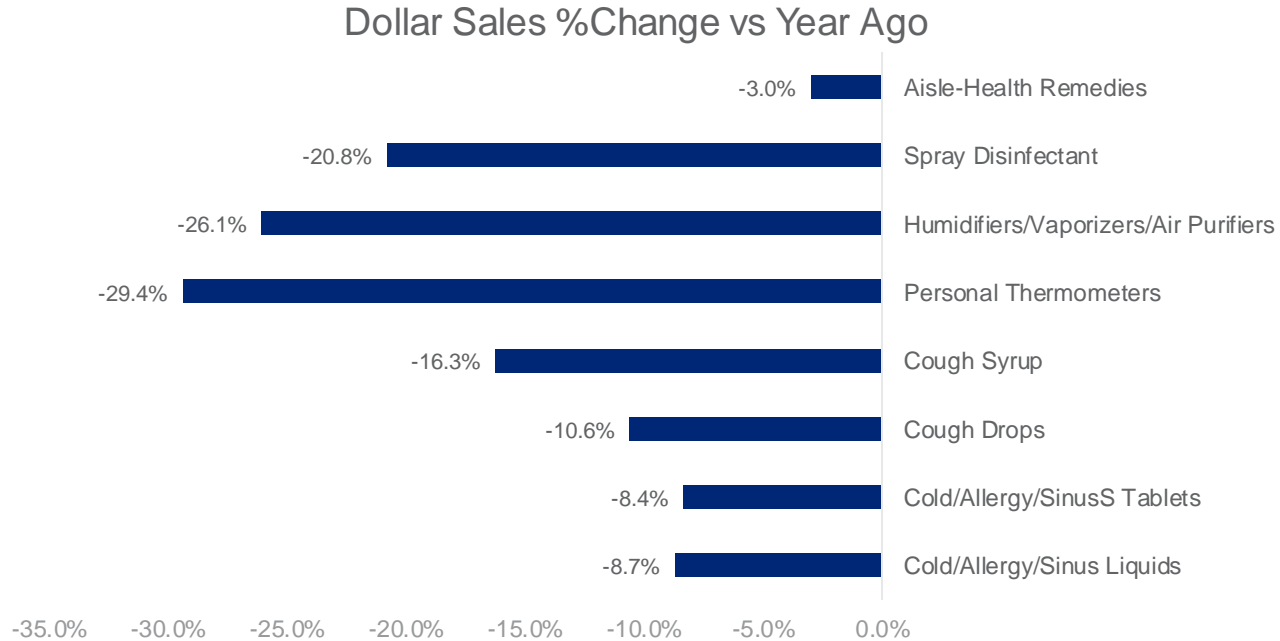
Source: IRI Market Advantage™ Illness Tracking, 2019



Sales of Flu Remedies and Other Associated Products are Down Versus Prior Year

Flu Impact on Sales

Total US - Multi Outlet Time: Latest 4 Weeks Ending Jan. 27, 2019



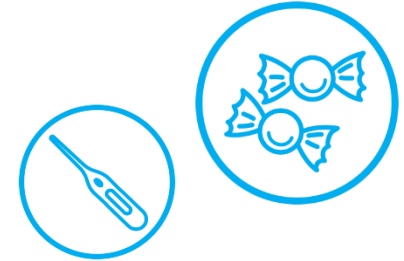
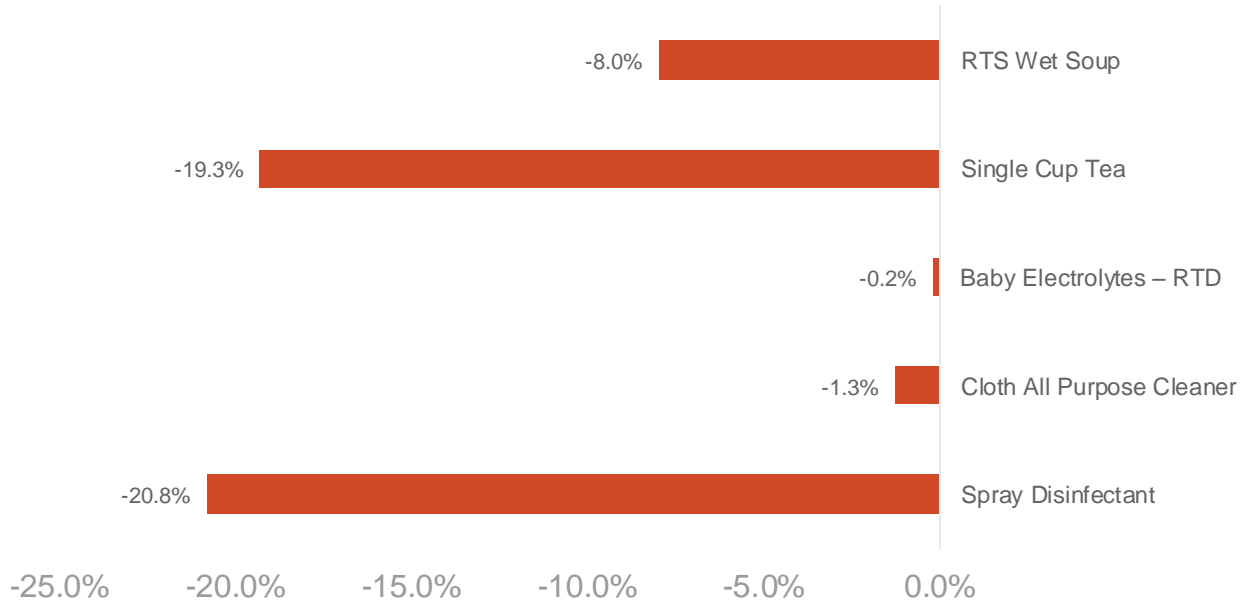
Source: IRI Market Advantage™ Illness Tracking, 2019

Comfort and Confidence Not Needed?

Non Health Care Sales vs Year Ago (Mild Flu Following Severe Season)

Total US - Multi Outlet Time: Latest 4 Weeks Ending Jan. 27, 2019

Dollar Sales %Change vs Year Ago

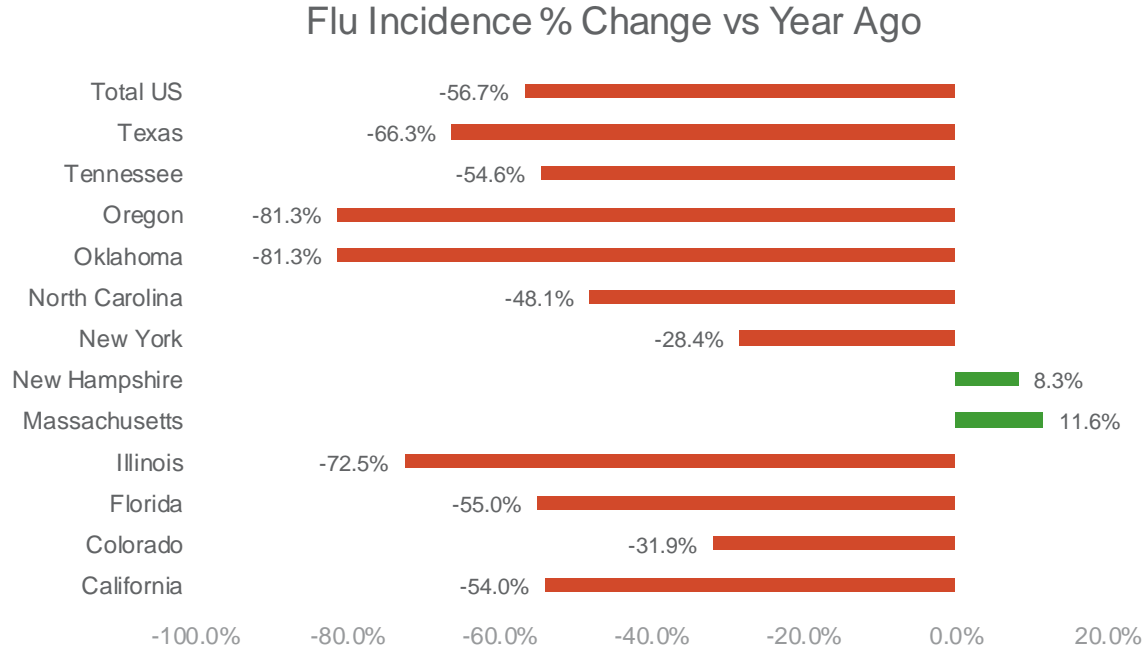


Source: IRI Market Advantage™ Illness Tracking, 2019

Total Incidence of Flu Down Nationwide, but There are Strong Pockets of Sufferers

Some Areas Like Massachusetts and New Hampshire Show More Flu

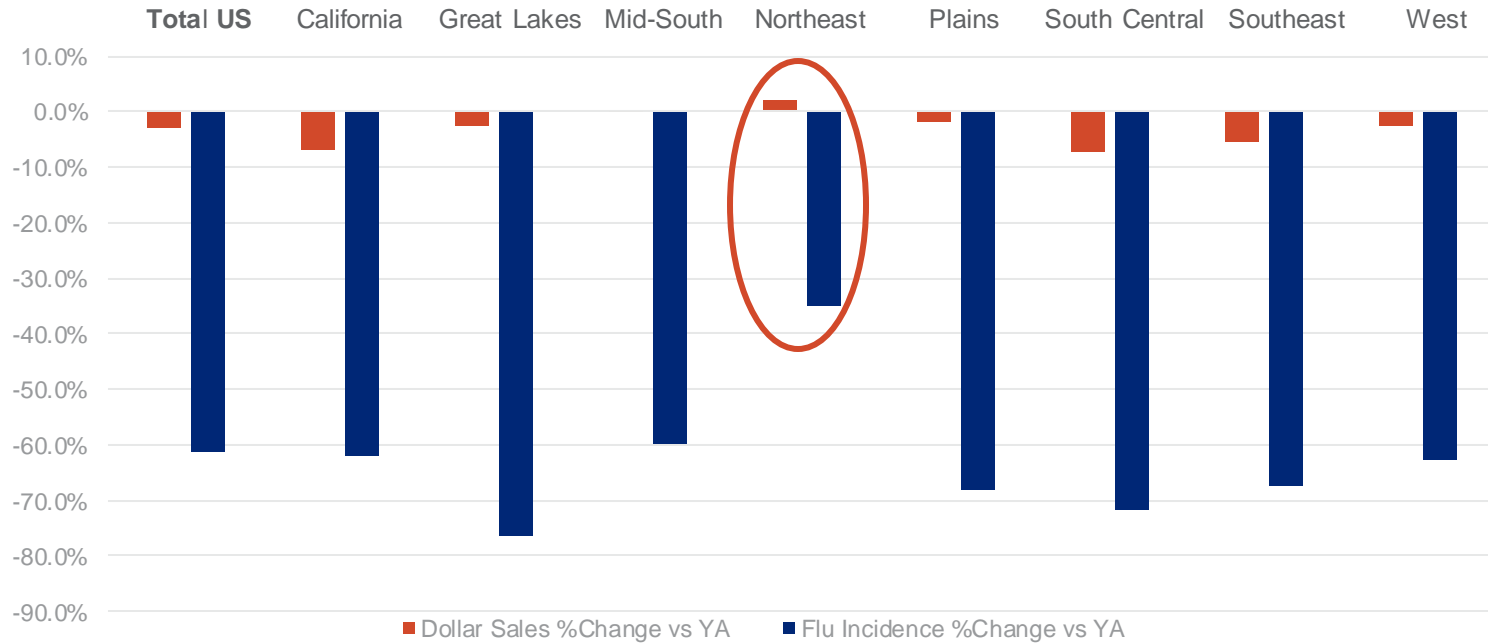
Latest 4 Weeks Ending Jan. 27, 2019



Source: IRI Market Advantage™ Illness Tracking, 2019

Keep Those Northeast Shelves Well Stocked

Health-Aisle Dollar Sales and Flu by Region vs Year Ago – Multi Outlet, Four Weeks Ending Jan. 27, 2019



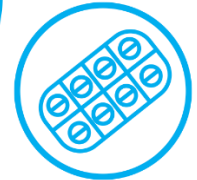
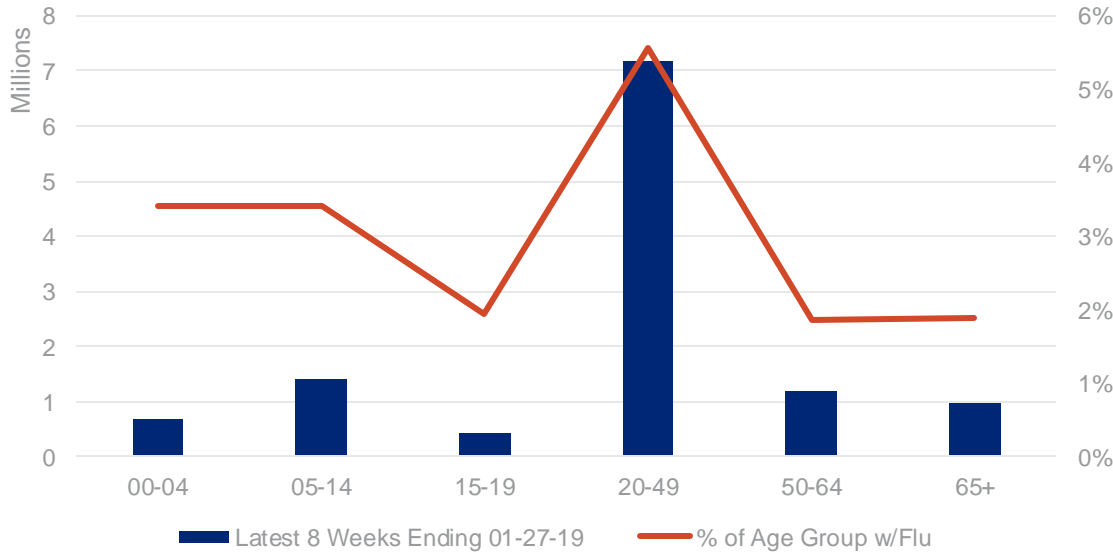
Source: IRI Market Advantage™ Illness Tracking, 2019



Millennials Among the Hardest Hit With Flu

Eight Weeks Ending Jan. 27, 2019

Total U.S. Flu by Age



Source: IRI Market Advantage™ Illness Tracking, 2019

Millennial spend on remedies indicates they're among the hardest hit by flu

	HH Age 18-24	HH Age 25-34	HH Age 35-44	HH Age 45-54	HH Age 55-64	HH Age 65+
Aisle-Health Remedies	5%	17%	-5%	1%	0%	-4%
Cold/Allergy/Sinus Liquids	N/A	19%	-7%	-9%	-9%	-10%
Cold/Allergy/Sinus Tablets	-19%	11%	-5%	0%	-5%	-8%
Cough Drops	N/A	2%	-10%	-2%	-5%	-9%
Cough Syrup	N/A	12%	-13%	-8%	-12%	-17%
Personal Thermometers	N/A	-9%	-23%	-1%	-4%	0%
Humidifiers/Vaporizers/Air Purifiers	N/A	10%	-30%	-1%	-8%	-19%
Spray Disinfectant	N/A	21%	-6%	-6%	-4%	-11%
Soup	19%	9%	-5%	-1%	-1%	-3%
RTS Wet Soup	2%	-2%	-6%	-5%	-5%	-8%
Single Cup Tea	N/A	-15%	1%	-12%	-28%	-10%
Baby Electrolytes – RTD	N/A	31%	7%	-3%	17%	-27%
Cloth All Purpose Cleaner	N/A	28%	4%	10%	10%	1%



Source: IRI Consumer and Shopper Insights Advantage™, 26 weeks ending Jan. 27, 2019

QUESTIONS & NEXT STEPS

Michael Kinishi, Principal, Product Management

Michael.Kinishi@IRIworldwide.com

