

ROZ BREWER

chief operating officer and
group president, Americas



FY18 U.S. FINANCIAL HIGHLIGHTS



+7%
NET SALES

HIGHLIGHTS

\$15.3B
TOTAL U.S. SALES

↑ 15% YOY
STARBUCKS
REWARDS MEMBERS

676
NEW STORES

↑ CUSTOMER
CONNECTION
SCORES

339
NEW DRIVE-THRU
STORES

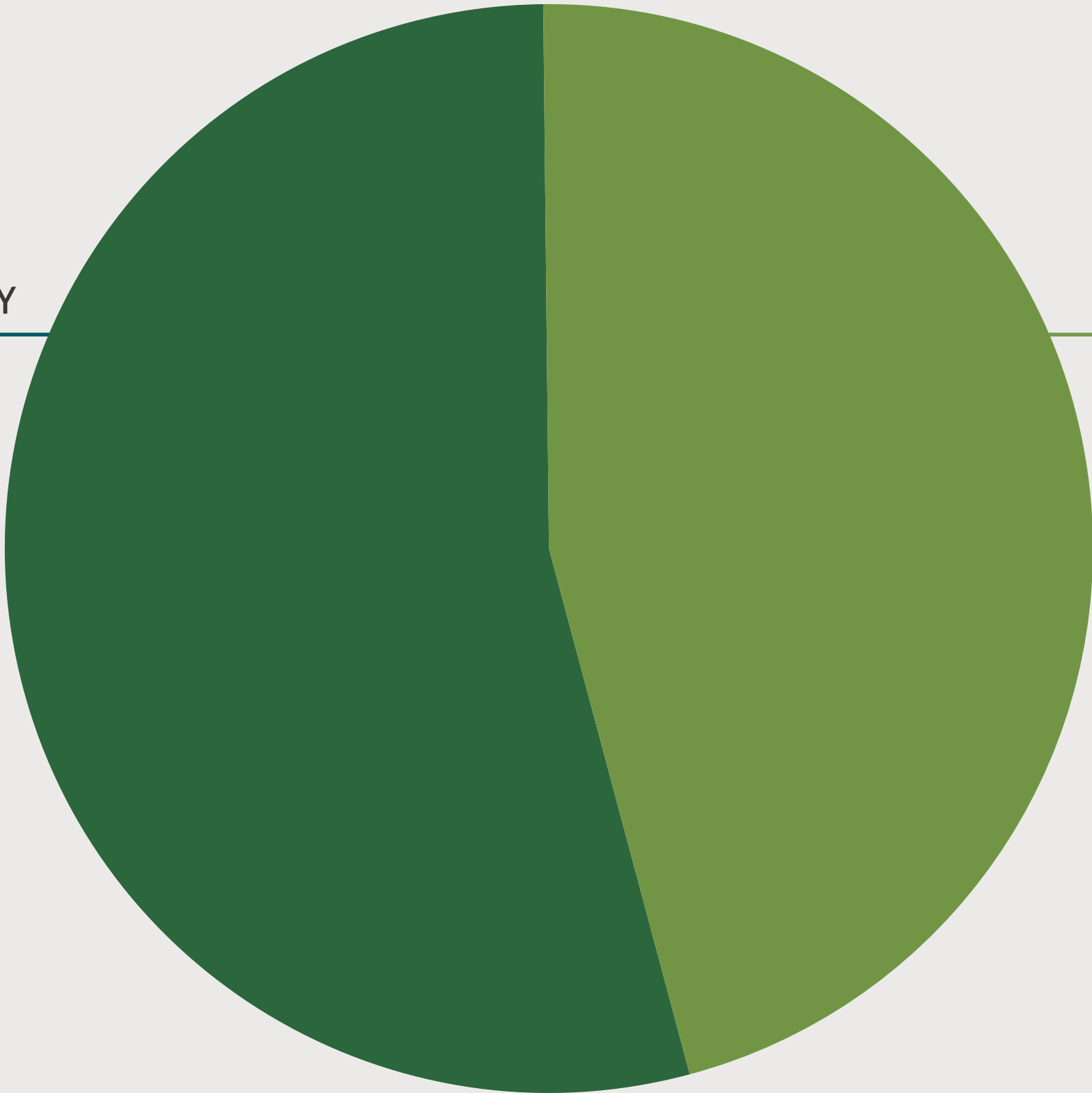
2%
COMP SALES



TOTAL PARTNER REWARDS

54%

ANNUALIZED AVERAGE PAY



46%

PARTNER BENEFITS

- Healthcare
- Starbucks College Achievement Plan
- 401(K) Match
- Bean Stock
- Parental Leave
- Care.com

ASSUMING 24 HOURS PER WEEK



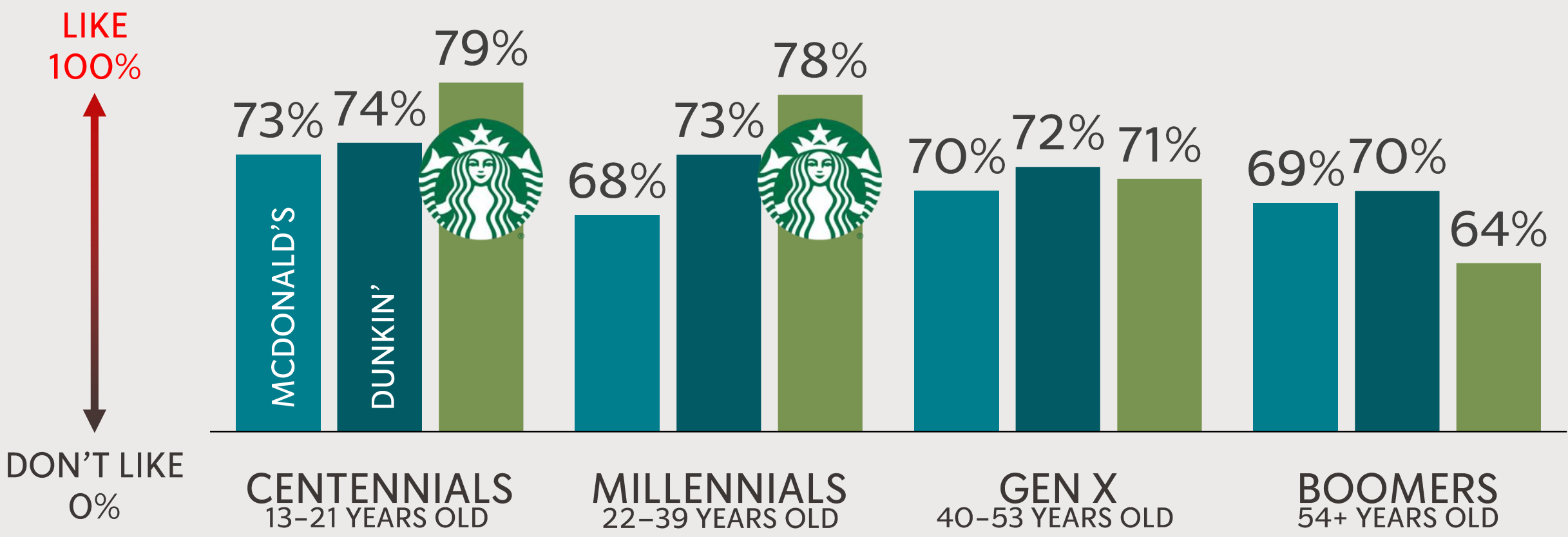
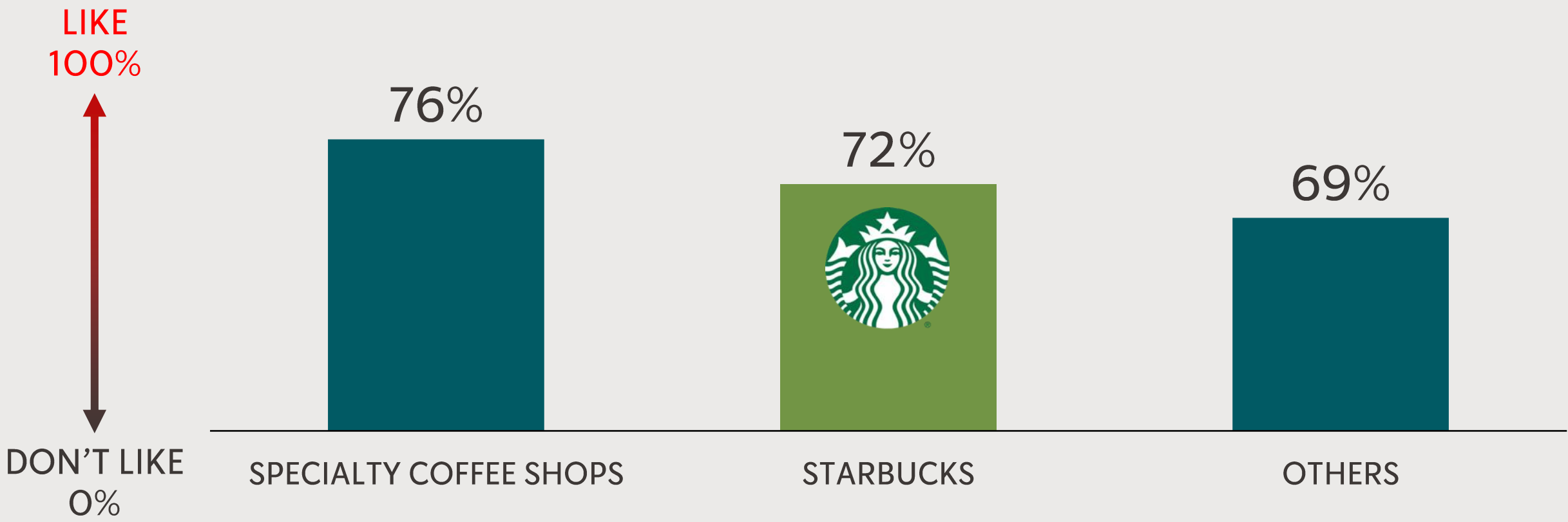




CUSTOMER
AT THE
CENTER

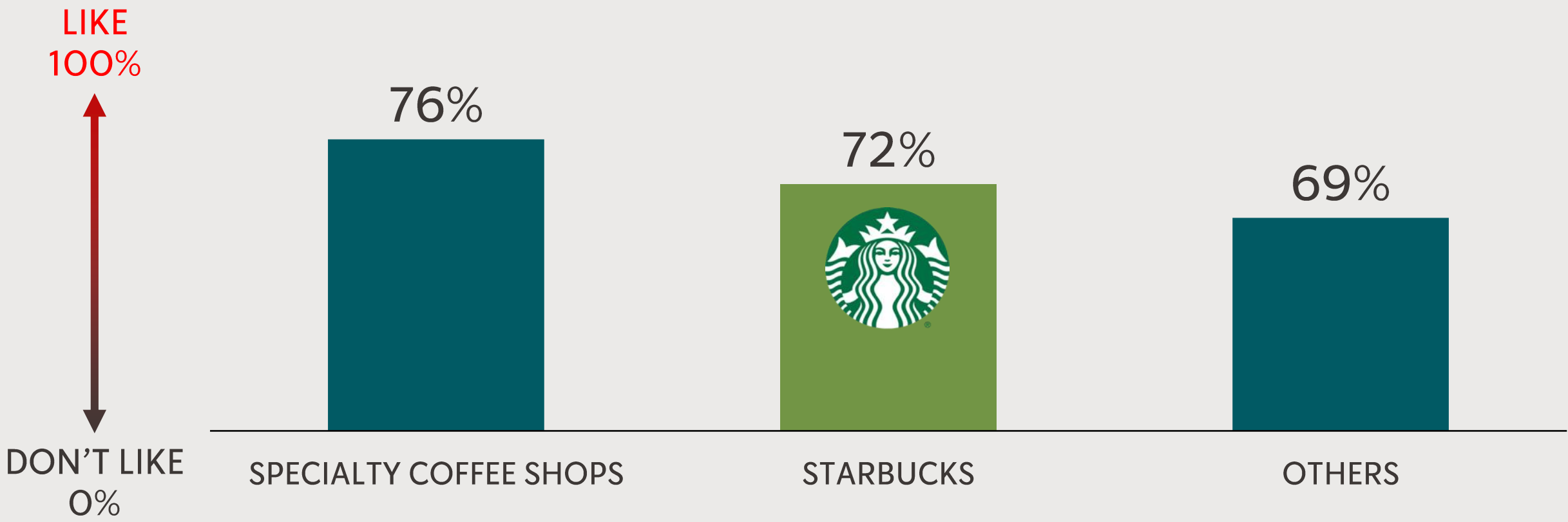


OUR BRAND IS STRONG WITH GROWTH POTENTIAL

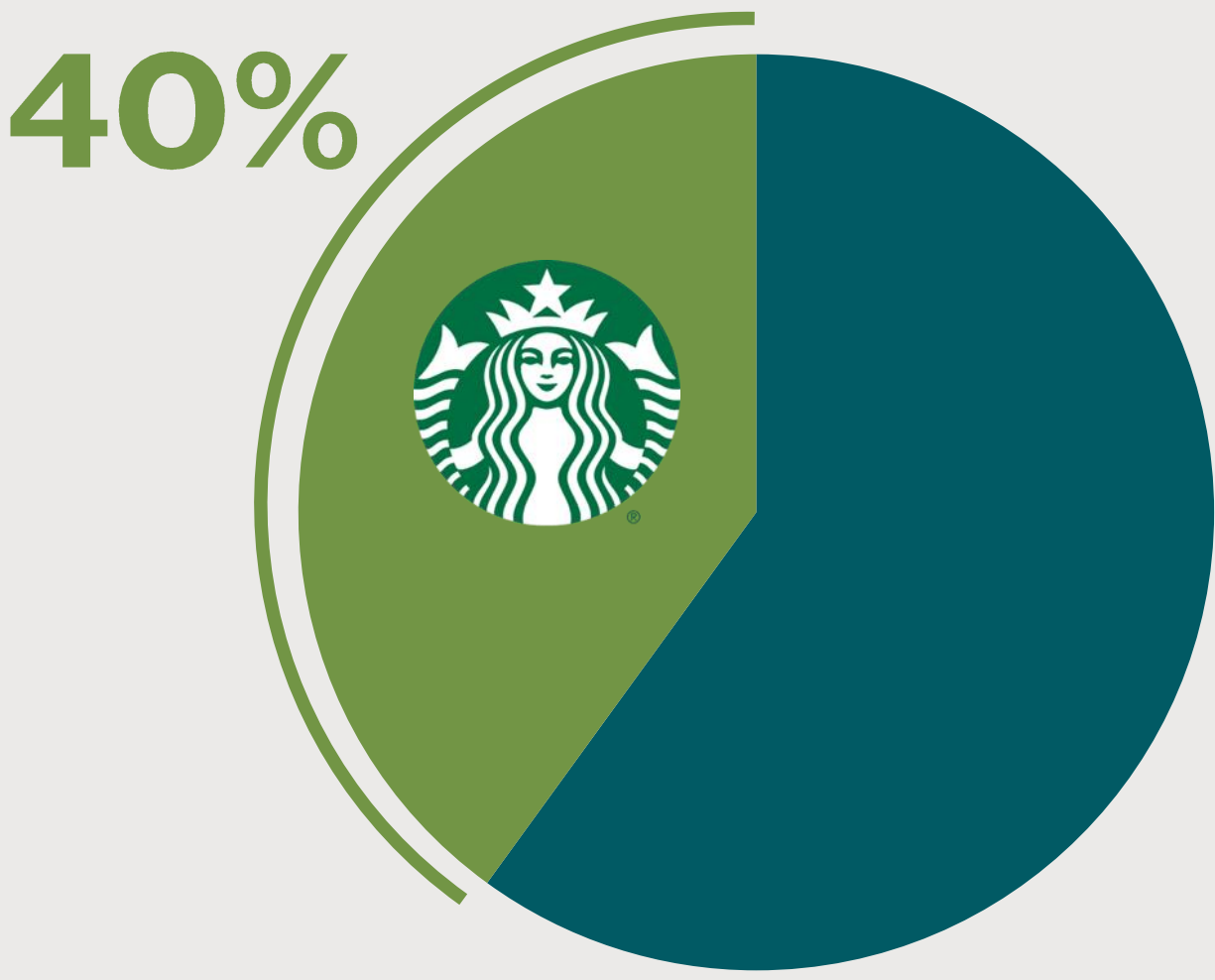
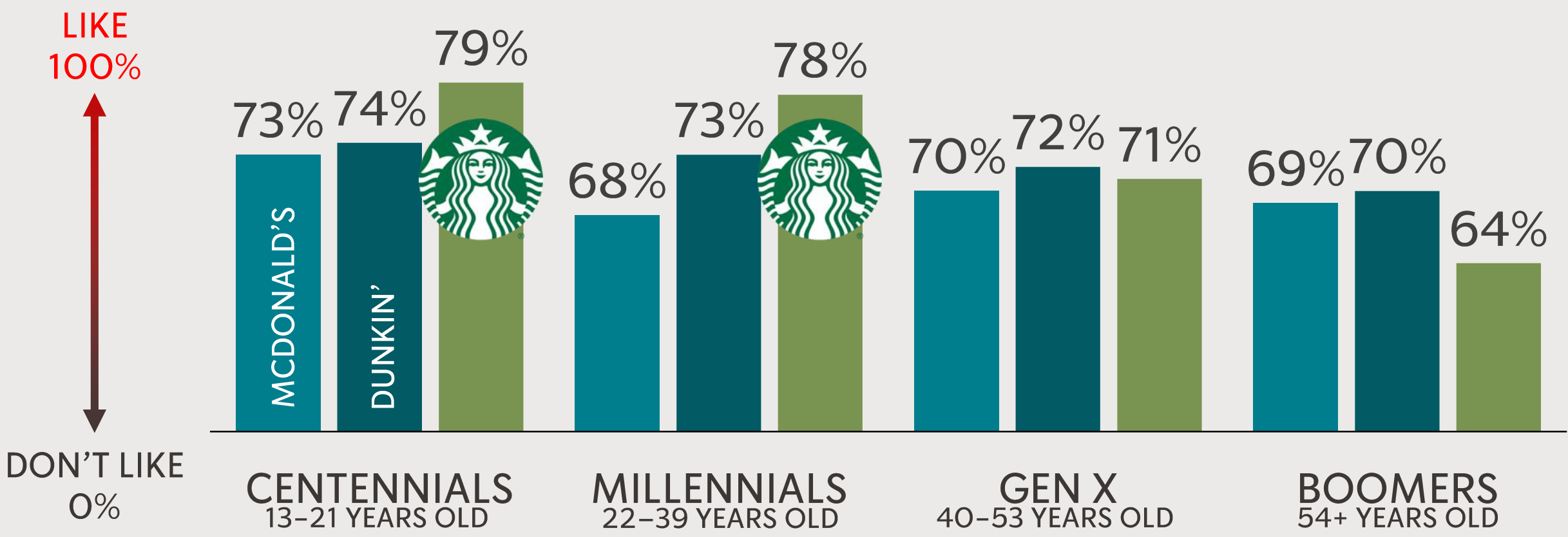


Dynamic Segmentation Refresh; Addressable population based on Brand Equity (73% of 250M US Adults engage in AFH Coffee & Tea in past 30 days – 182M)
SOURCE: Brand Equity Q3 FY17 and Q3 FY18

OUR BRAND IS STRONG WITH GROWTH POTENTIAL



>180M
U.S. ADULTS ENGAGED
IN COFFEE AND TEA



Dynamic Segmentation Refresh; Addressable population based on Brand Equity (73% of 250M US Adults engage in AFH Coffee & Tea in past 30 days - 182M)
SOURCE: Brand Equity Q3 FY17 and Q3 FY18

U.S. OPERATING INITIATIVES

ENHANCING THE IN-STORE EXPERIENCE



DELIVERING BEVERAGE INNOVATION



DRIVING DIGITAL RELATIONSHIPS

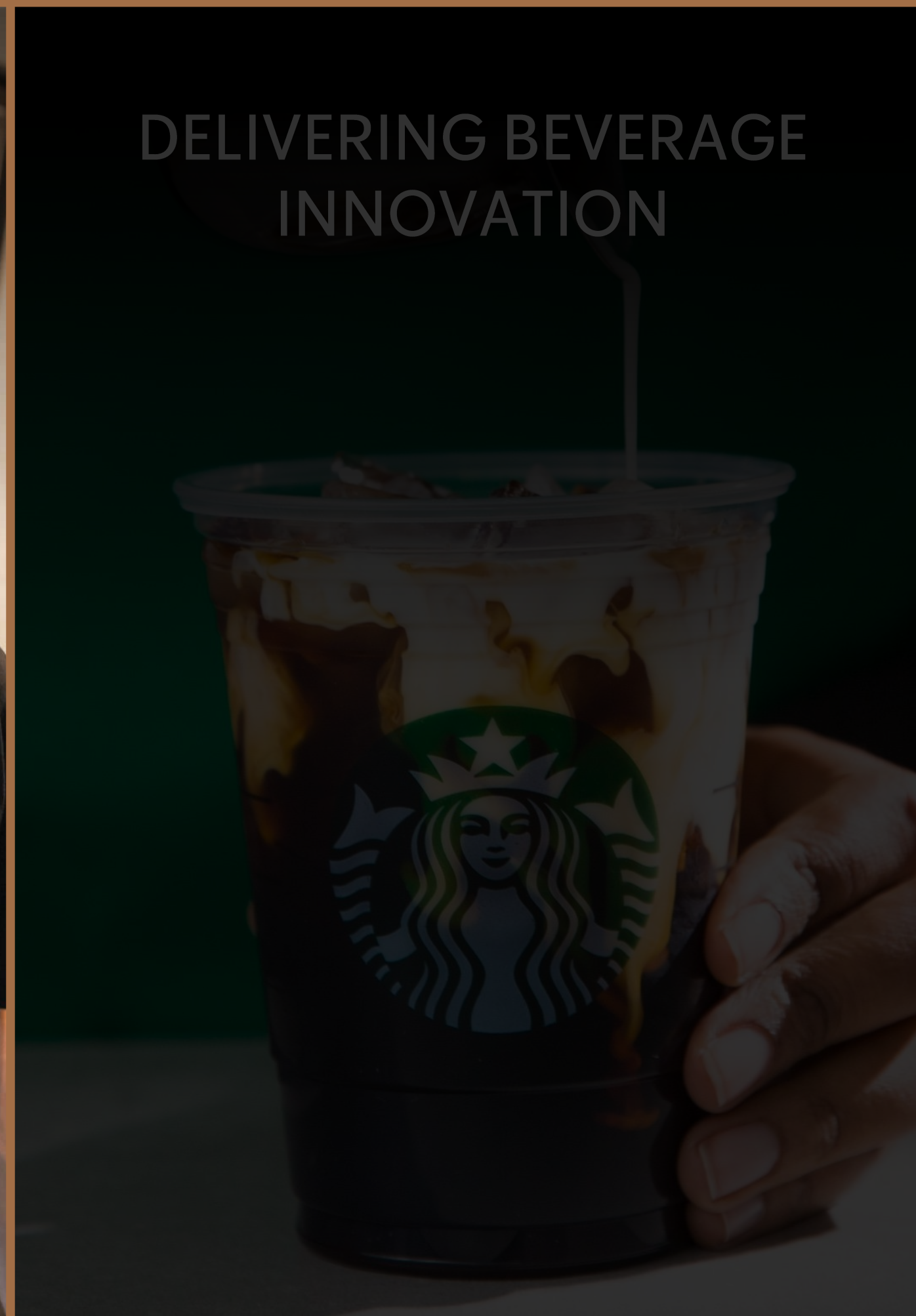


U.S. OPERATING INITIATIVES

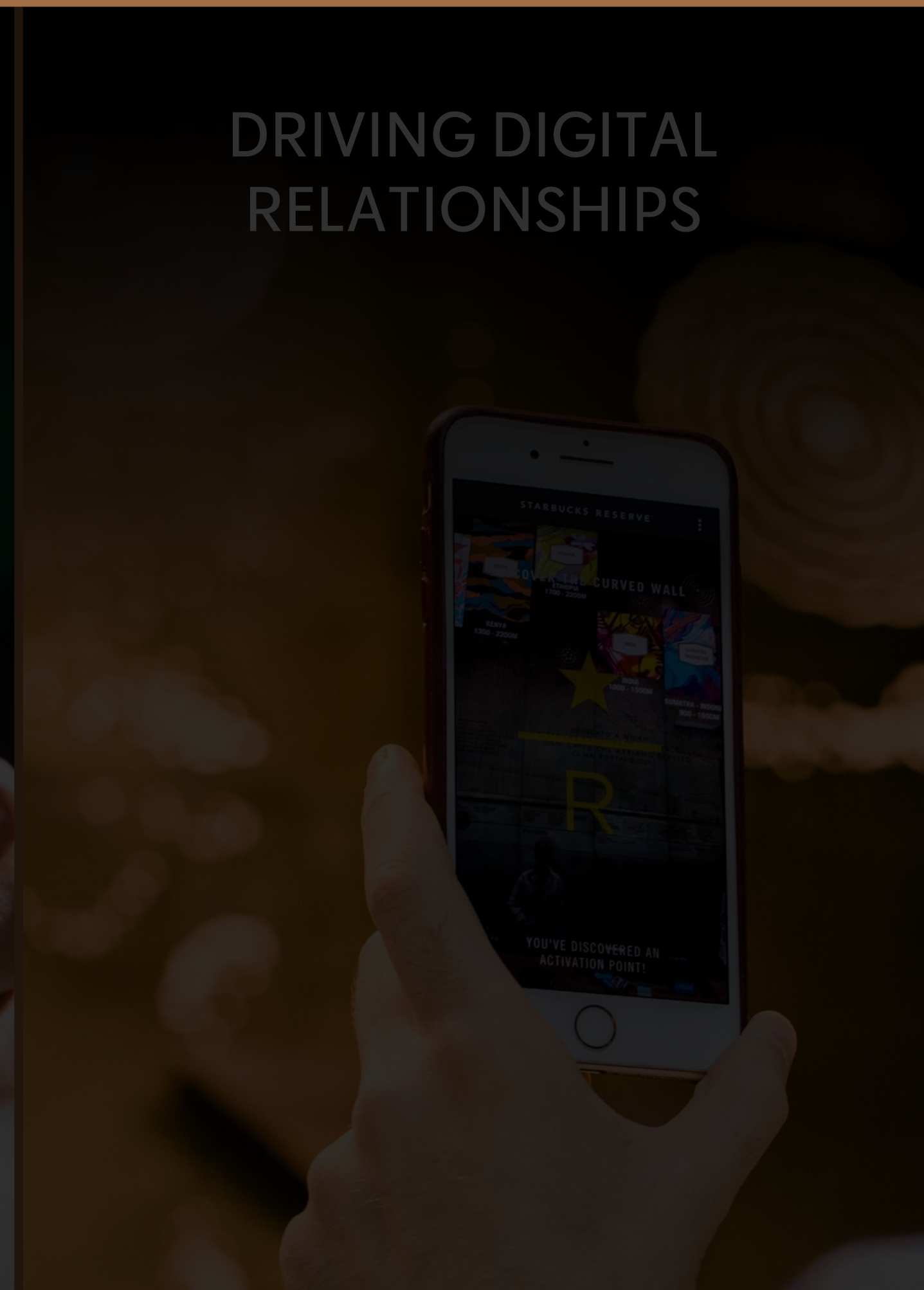
ENHANCING THE IN-STORE EXPERIENCE



DELIVERING BEVERAGE INNOVATION



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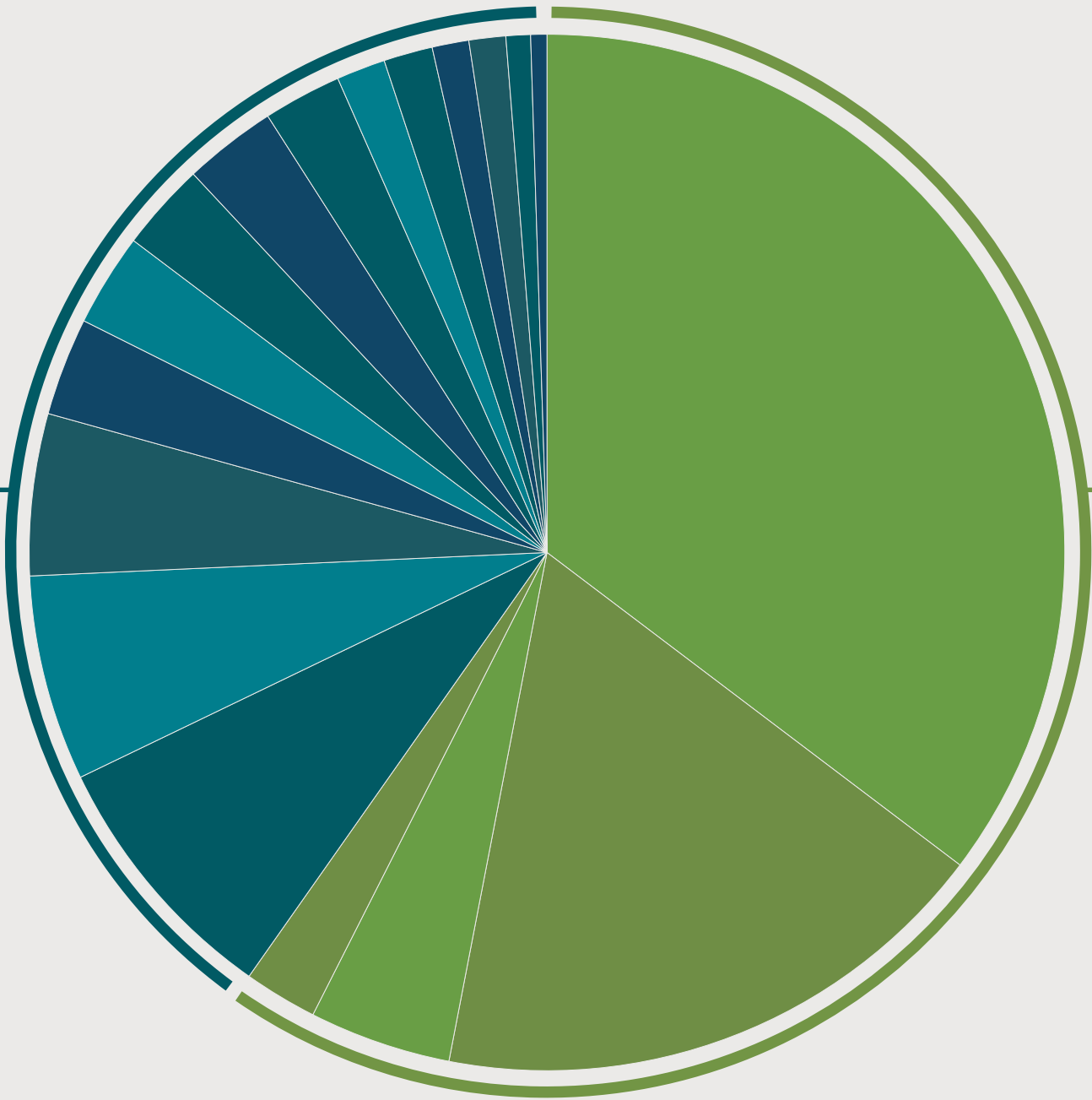


HOW PARTNERS SPEND THEIR TIME IN A DAY

40%

NON-CUSTOMER FACING

- Cleaning
- Restocking
- Inventory Management
- Partner Development
- General Admin/Other
- Scheduling



60%

CUSTOMER FACING

- Customer Engagement
- Beverage and Food Craft
 - Enhancing Deployment
 - Seasonal Favorites
 - Coffee Art
- Brew Experience
 - Brew Methods
 - Tastings
- POS









Starbucks



Post to a group



Highly successful first clean play tonight, what a fun evening with my A-team!!

We had a plan and executed it!! After completing tonight's clean play, we truly did find value in doing a very thorough cleaning on the items listed in the clean play. This will in turn, honestly give us more time to create best moments in our customers days.



INVENTORY MANAGEMENT

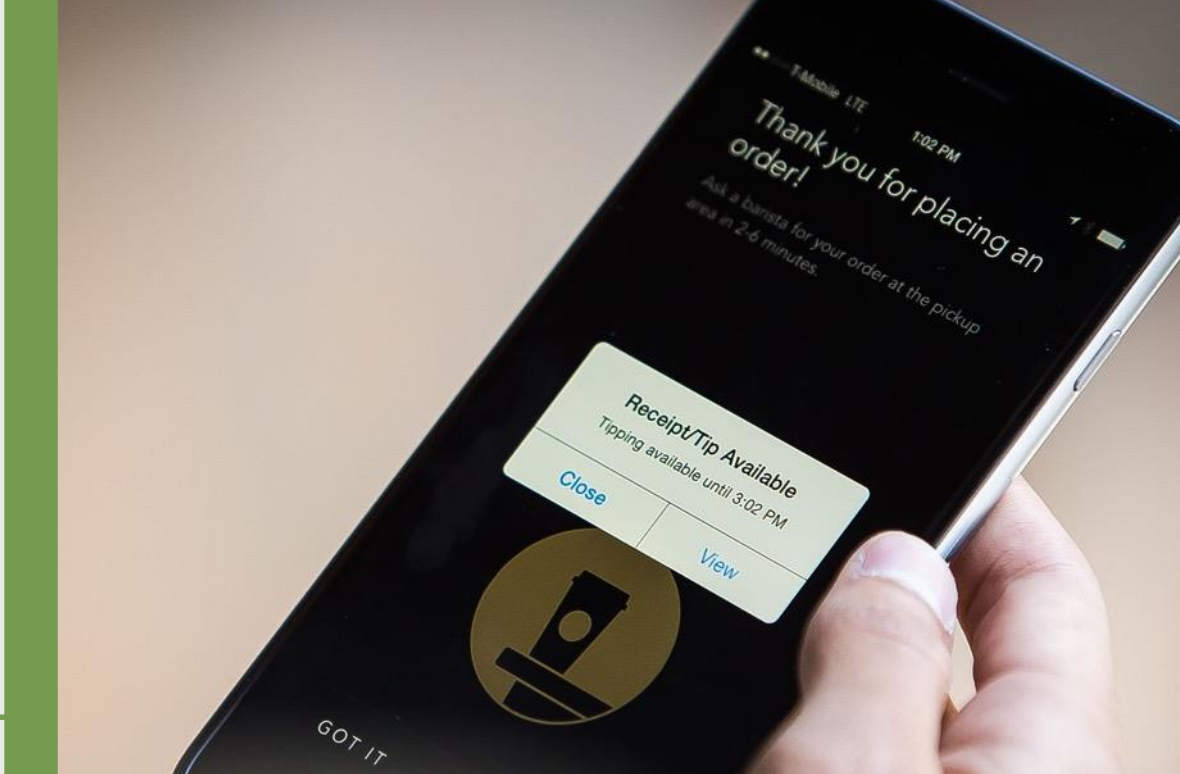
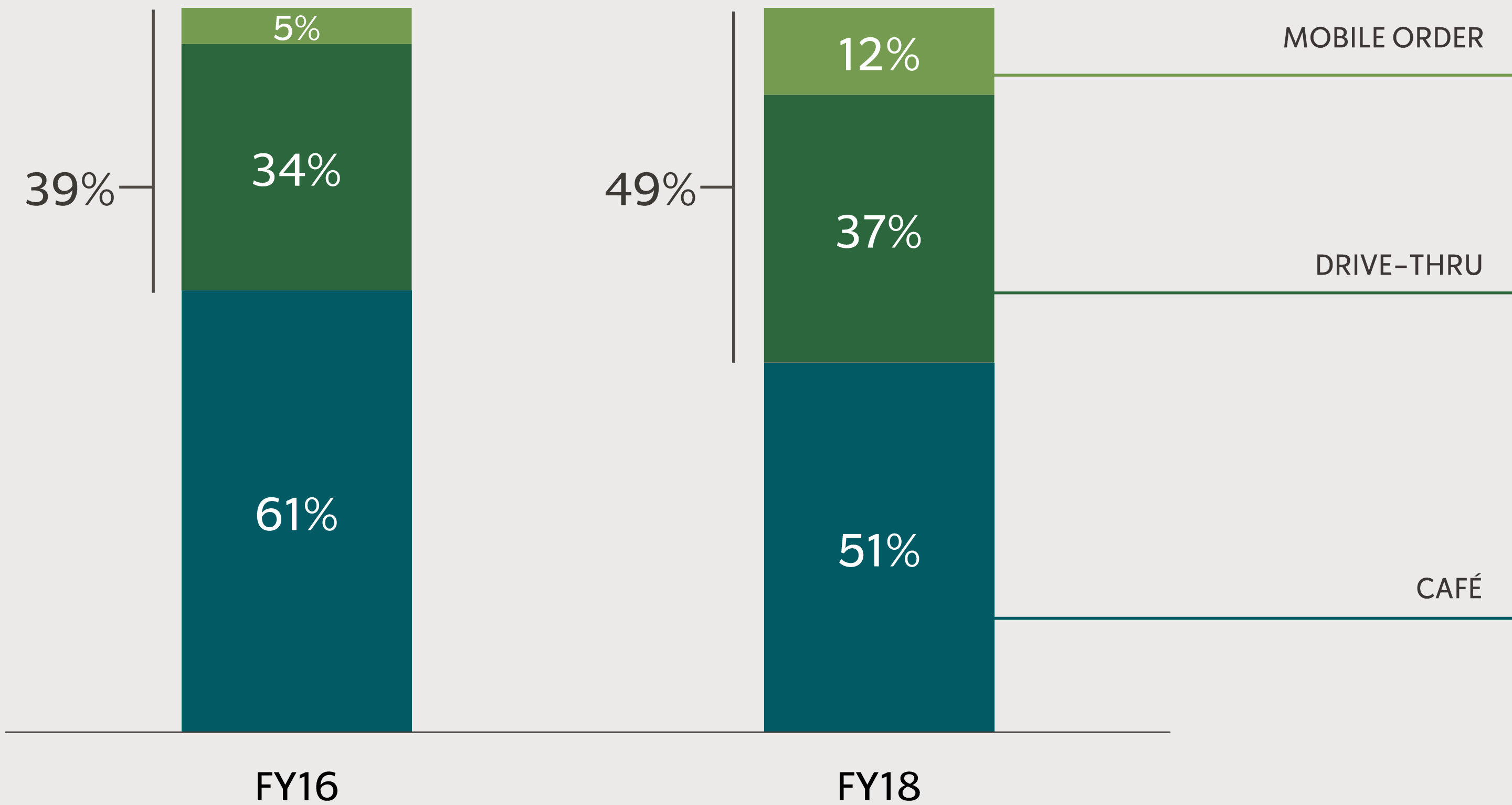




RENOVATION STRATEGY

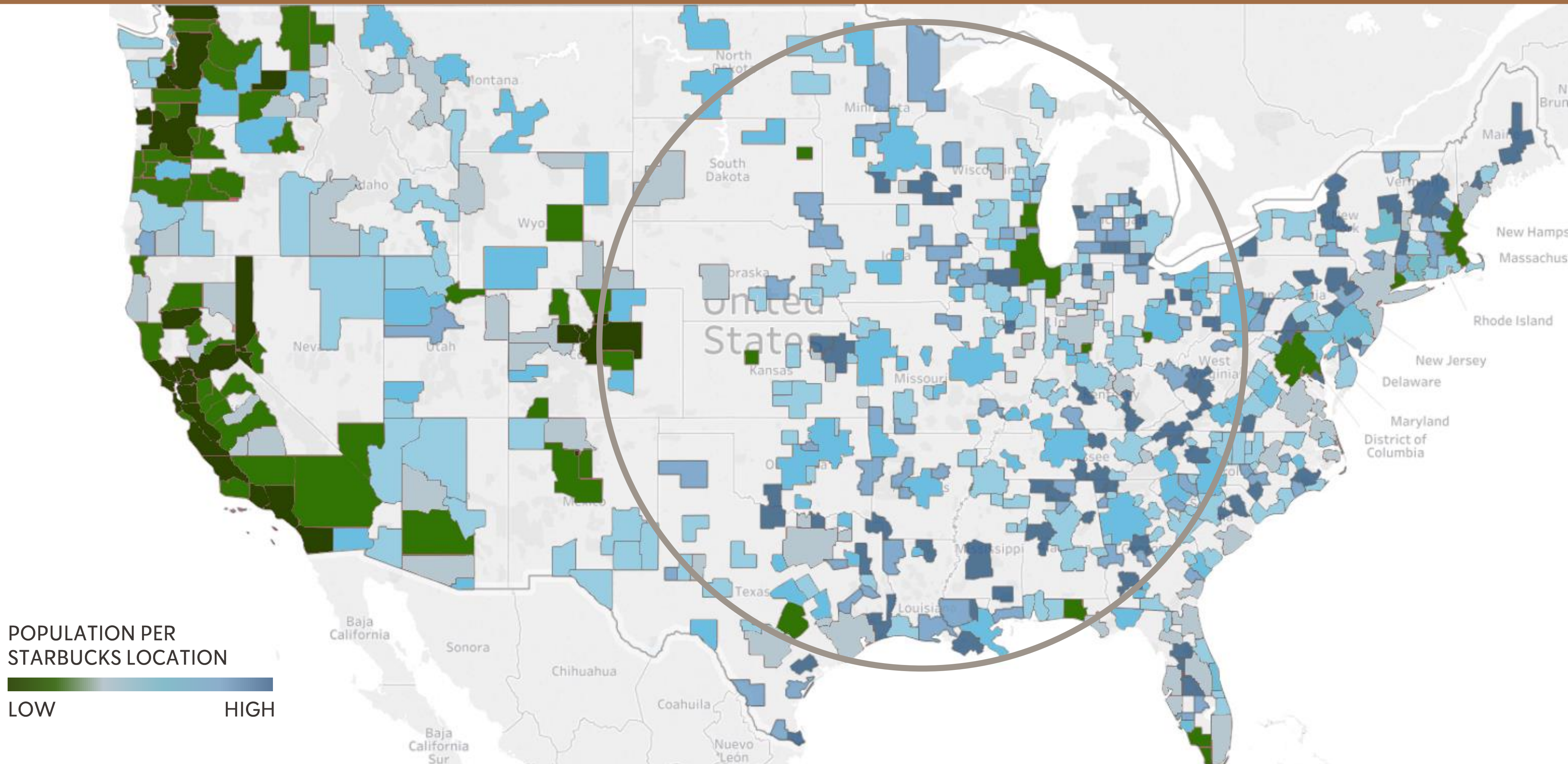
MEETING CUSTOMER DEMAND FOR CONVENIENCE

NET SALES BY ORDER CHANNEL



U.S. Company operated stores only

U.S. GROWTH OPPORTUNITY





DRIVE THRU

STARBUCKS

EXIT ONLY







STARBUCKS
DELIVERS
IN PARTNERSHIP WITH
UBER
eats



U.S. OPERATING INITIATIVES

ENHANCING THE
IN-STORE EXPERIENCE



DELIVERING BEVERAGE
INNOVATION

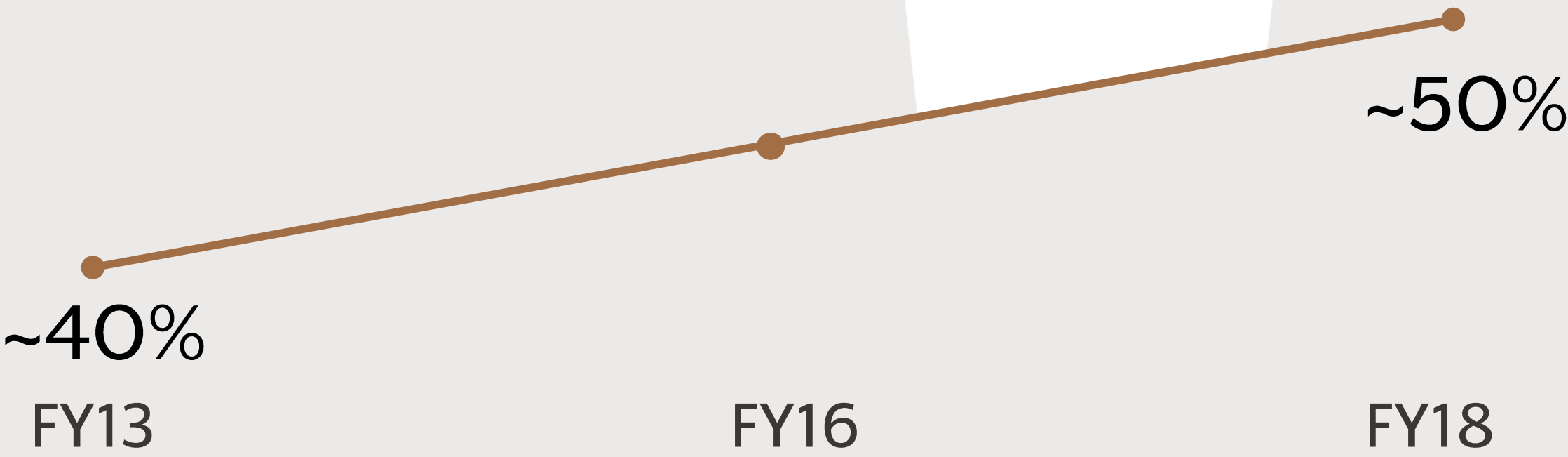


DRIVING DIGITAL
RELATIONSHIPS



COLD PLATFORM ON THE RISE

COLD
PLATFORMS
>80%
BEVERAGE
GROWTH
LAST 2 YEARS



U.S. Company operated stores only



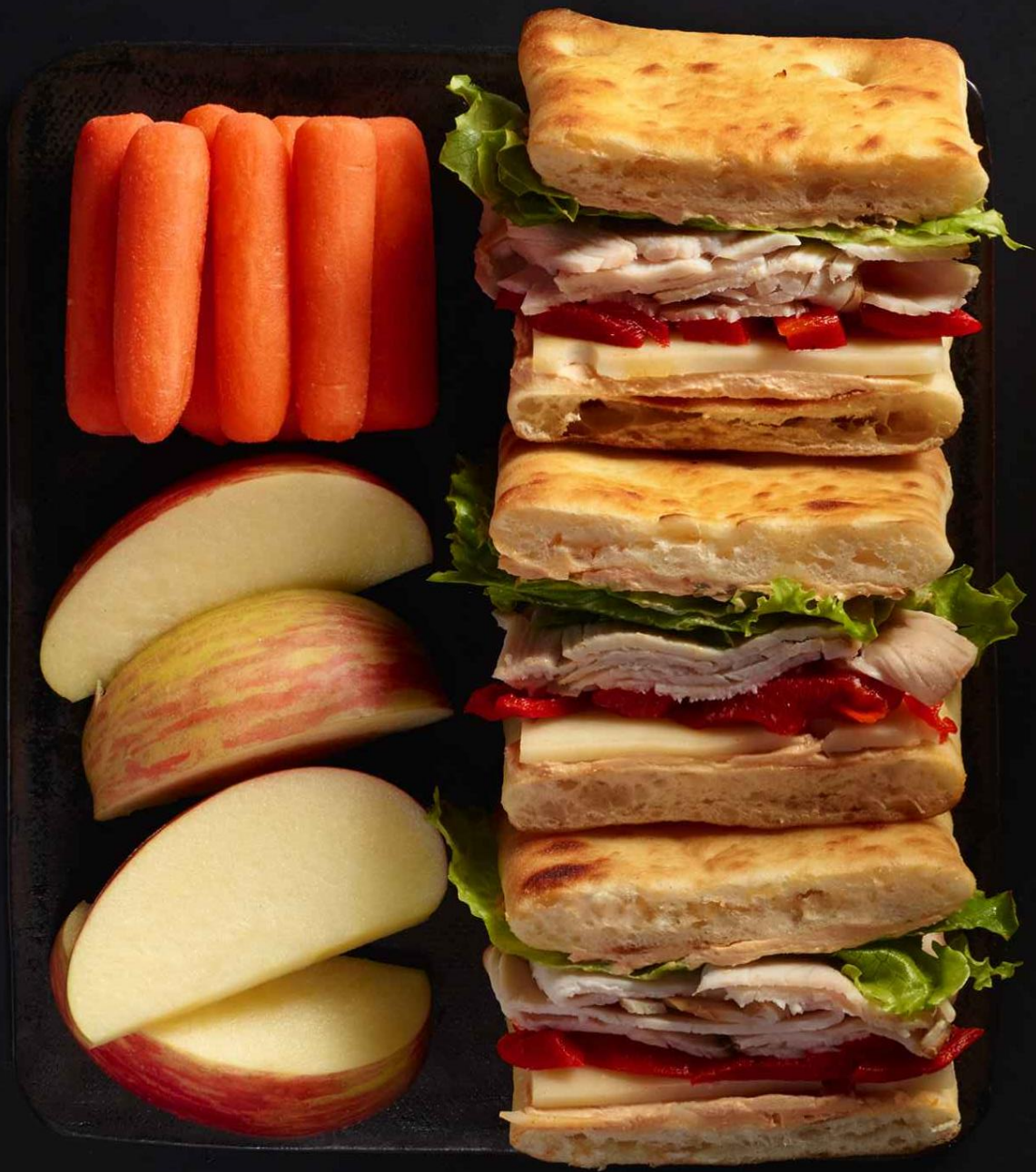


**NITRO
COLD
BREW**



**SPICED
MERINGUE
MACCHIATO**





STARBUCKS
FOOD

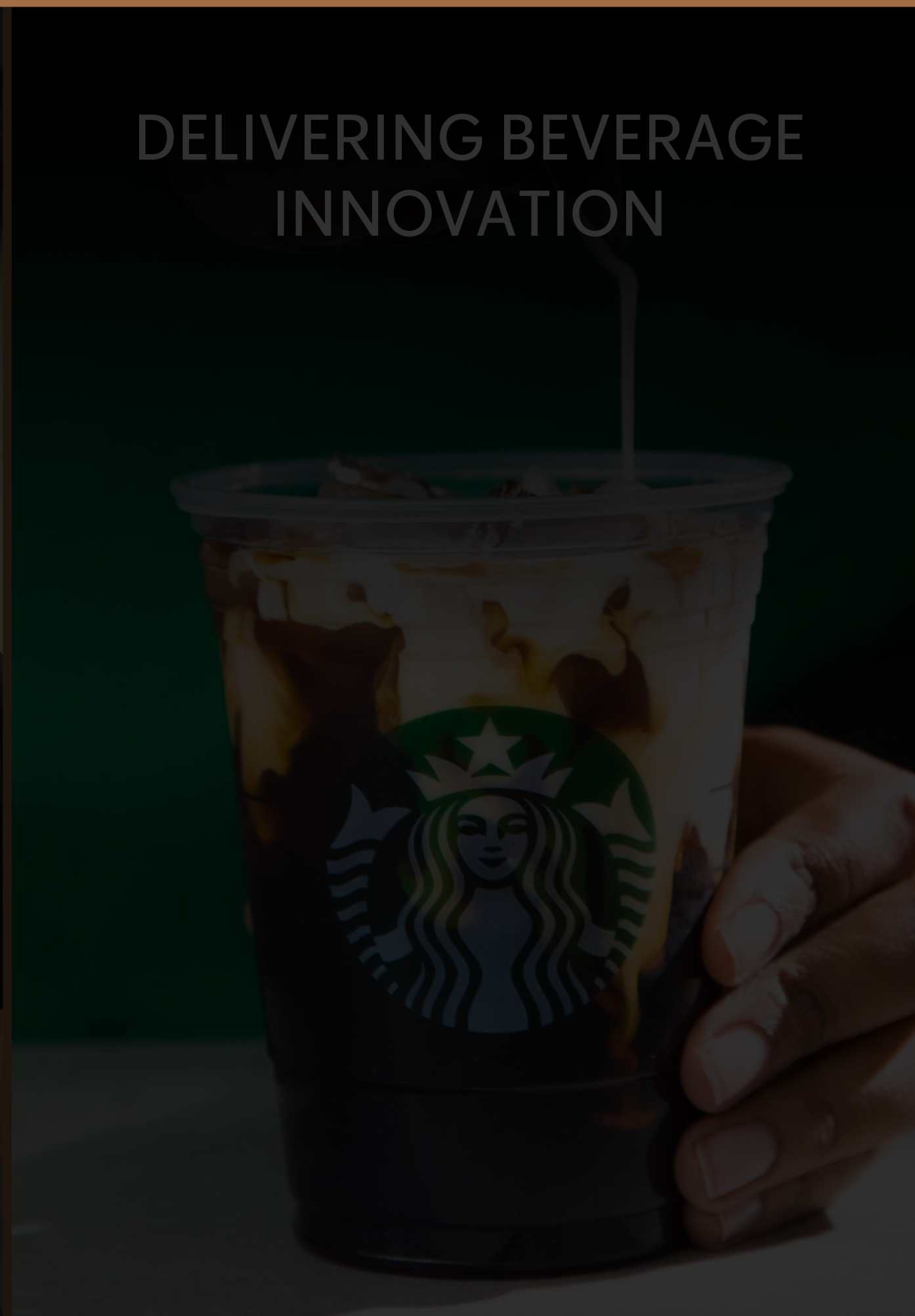


U.S. OPERATING INITIATIVES

ENHANCING THE IN-STORE EXPERIENCE



DELIVERING BEVERAGE INNOVATION



DRIVING DIGITAL RELATIONSHIPS





DIGITAL
ENABLERS

STARBUCKS®
**happy
hour**

BE JOLLY

BY GOLLY

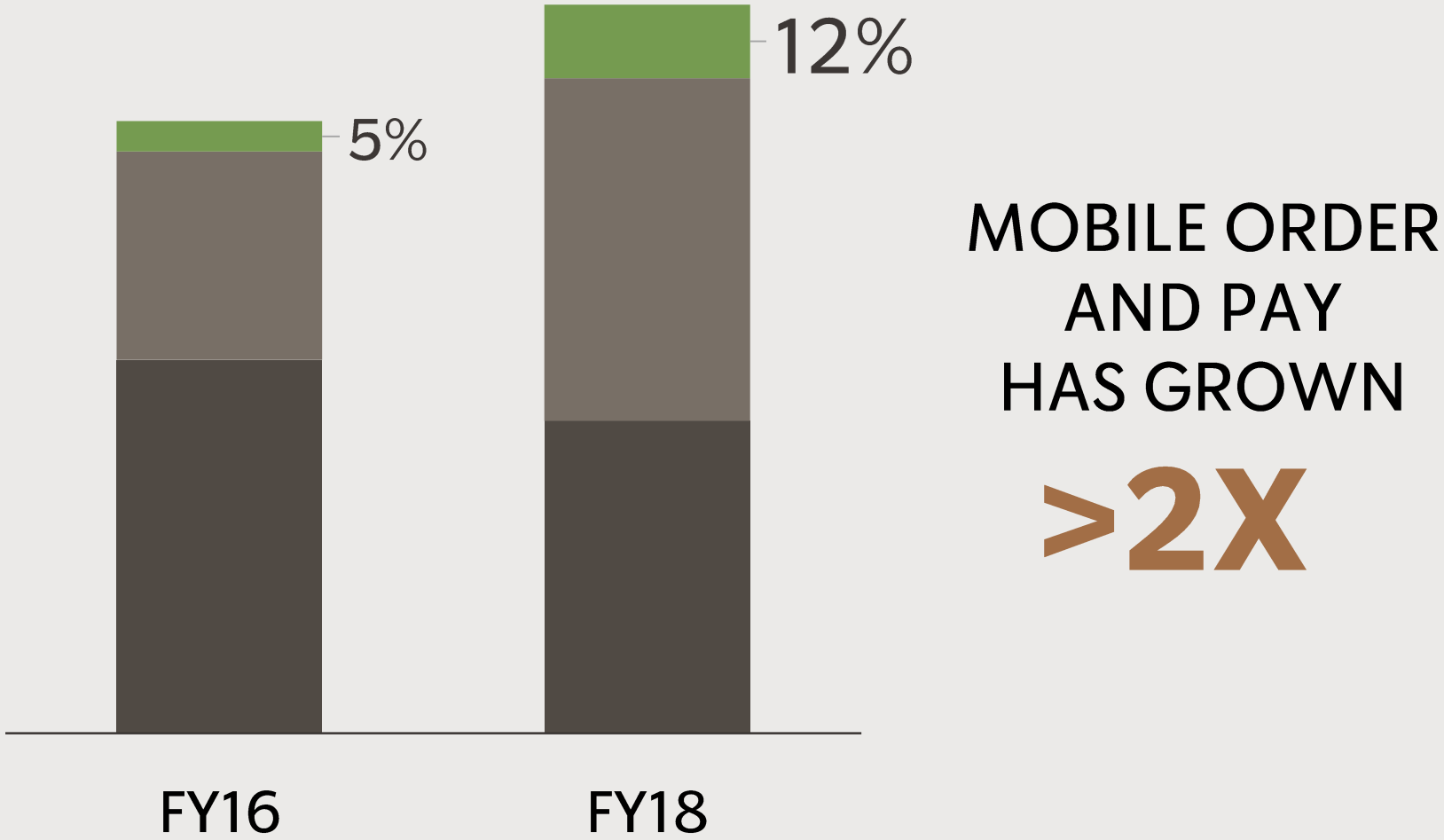
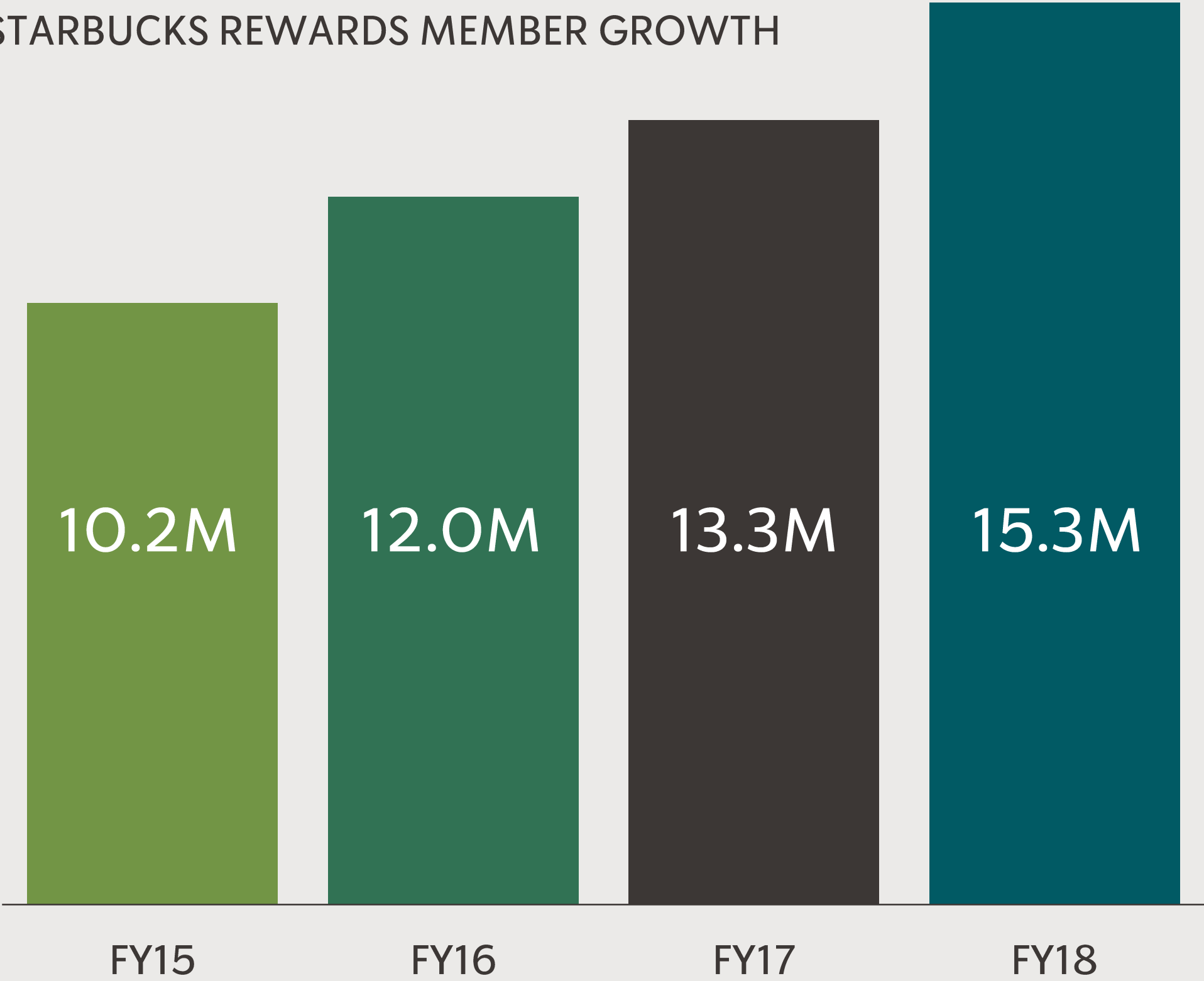


I never get bakery items but thanks to y'all I now play the Starbucks for life game and used my first freebie coupon to snag a Sugar Plum Danish 🥰
This thing is heaven. I need to rethink this whole 'I never get bakery items' mistake... what's everyone's favorite holiday treat?!

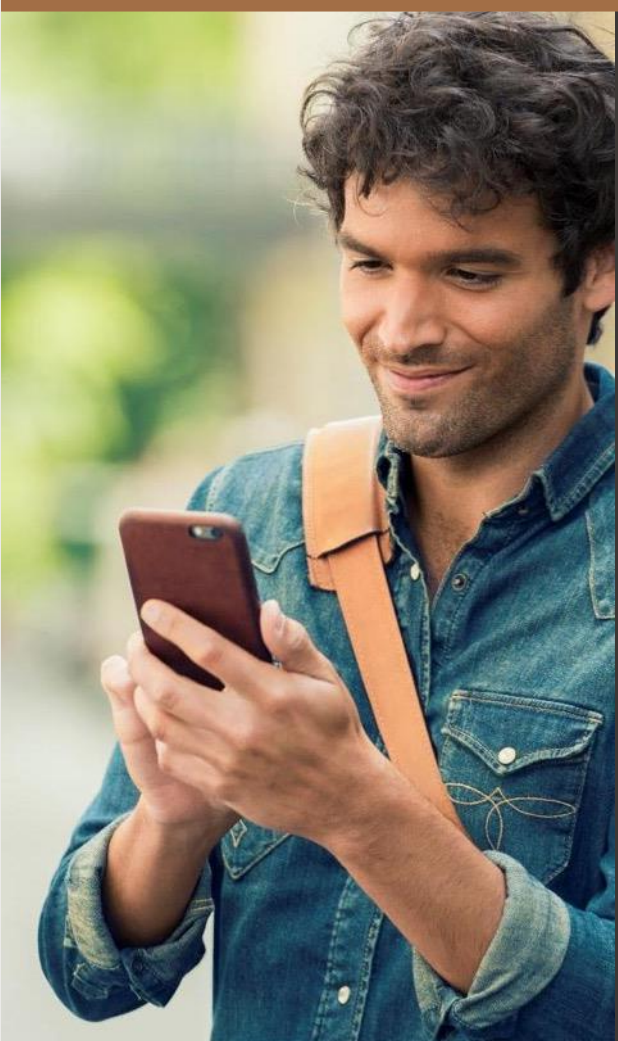


3 DRIVERS OF DIGITAL COMP GROWTH

STARBUCKS REWARDS MEMBER GROWTH

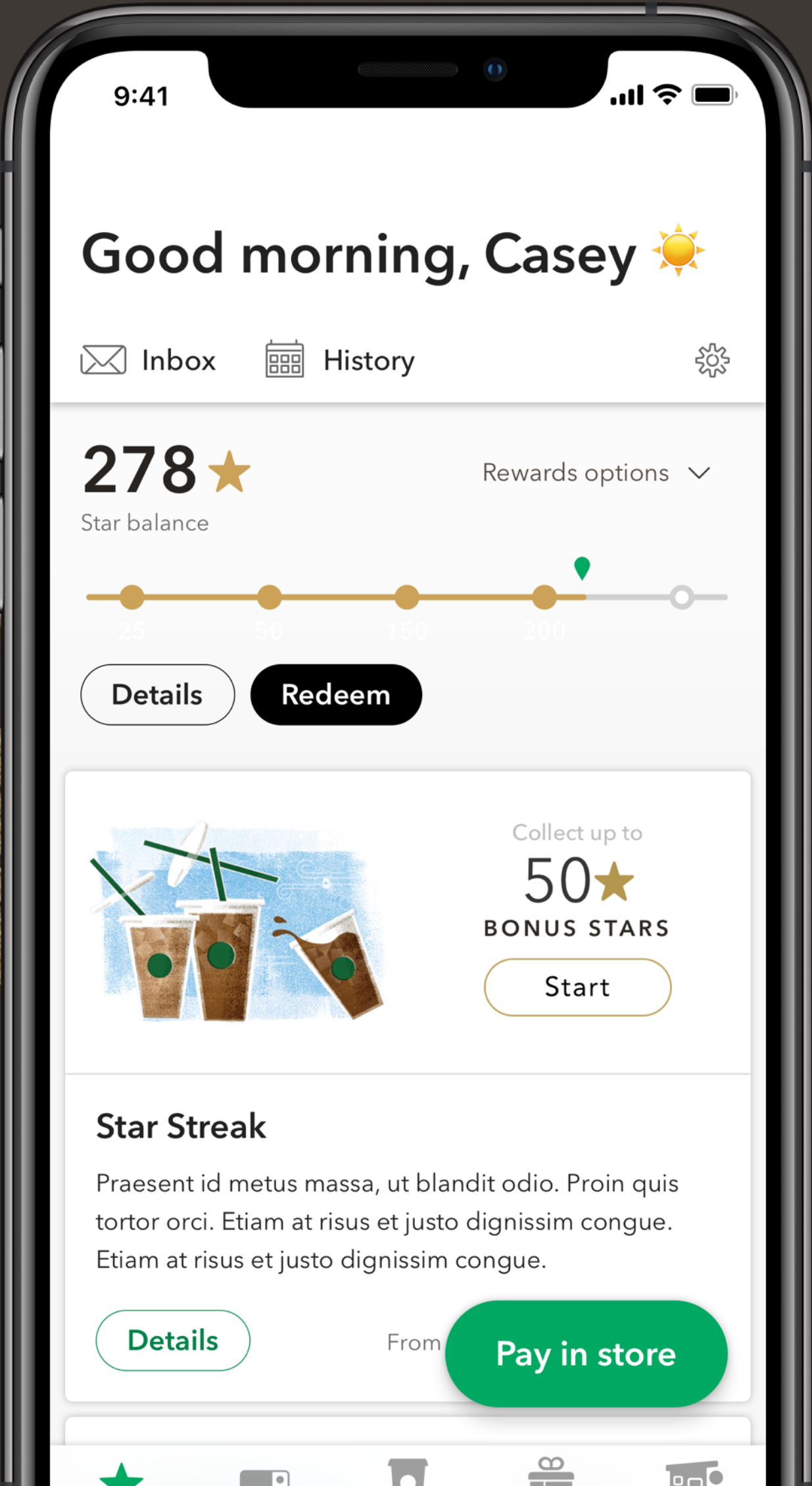


MOBILE ORDER
AND PAY
HAS GROWN
>2X



DIGITAL CUSTOMER ENGAGEMENT

- MARKETING
- STARBUCKS REWARDS PROGRAM ENHANCEMENTS
- EXPAND DIGITAL RELATIONSHIPS



FUELING OUR GROWTH



1

WAYS OF
WORKING



2

SUPPLY
CHAIN



3

EFFICIENT
LABOR



4

WASTE
REDUCTION



5

PRODUCT
OPTIMIZATION



KEY TAKEAWAYS

The customer is at the center of our decision making.

There's momentum in the business.

We have room to grow our U.S. footprint.

We're executing with speed.

