CGA by NIQ Pulse+ Reports

In-depth consumer insights and sales metrics to provide a full view of the Australian On Premise

CGA by NIQ Pulse+ Reports

Tried and trusted within the global BevAl industry, CGA by NIQ's On Premise Pulse+ Reports provide leading data and insights derived from our best-in-class tools.

Exploring both consumer and sales data, the reports provide a comprehensive view of the On Premise landscape, allowing you to:

+ Gain an in-depth understanding of Australian On Premise consumers
+ Be up-to-date with sales velocity trends and performance across Australia
+ Keep a pulse on consumer trends and hot topics
+ Determine the opportunities presented to you within the beverage and hospitality industry

CGA Powered by NIQ

Pulse+ Report delivery

CGA by NIQ's On Premise Pulse+ Reports help suppliers and manufactures across food and beverage keep a pulse on the industry by featuring current insights derived from a variety of our best-in-class data tools.

2 PPT Reports sent per month

+ 1 Sales Impact Report

Providing sales velocity and ticket count trends, exploring specific states to measure bar and restaurant sales performance.

+ 1 On Premise Consumer Pulse Report

Compiling the most current trends and hot topics, analysing On Premise consumer engagement.

Pulse+ Report costing

Full subscription access: $6,000 p.a*

- Access to the full monthly Pulse+ Report delivery
- 1 x Sales Impact Report
- 1 x Consumer Pulse Report

For non-subscribers: Pulse Snapshot Report

A snapshot, providing topline key metrics of the full Pulse+ Reports is available for free to all Pulse and Pulse+ subscribers.

***All contracted CGA clients gain full access to Impact Reports within their subscription to core CGA services**

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Sales Impact Report

Examples of the report

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ON PREMISE SALES

IMPACT REPORT

CGA by NIQ, July 21 2023

https://cgastrategy.com/covid-19-on-premise-impact-us/

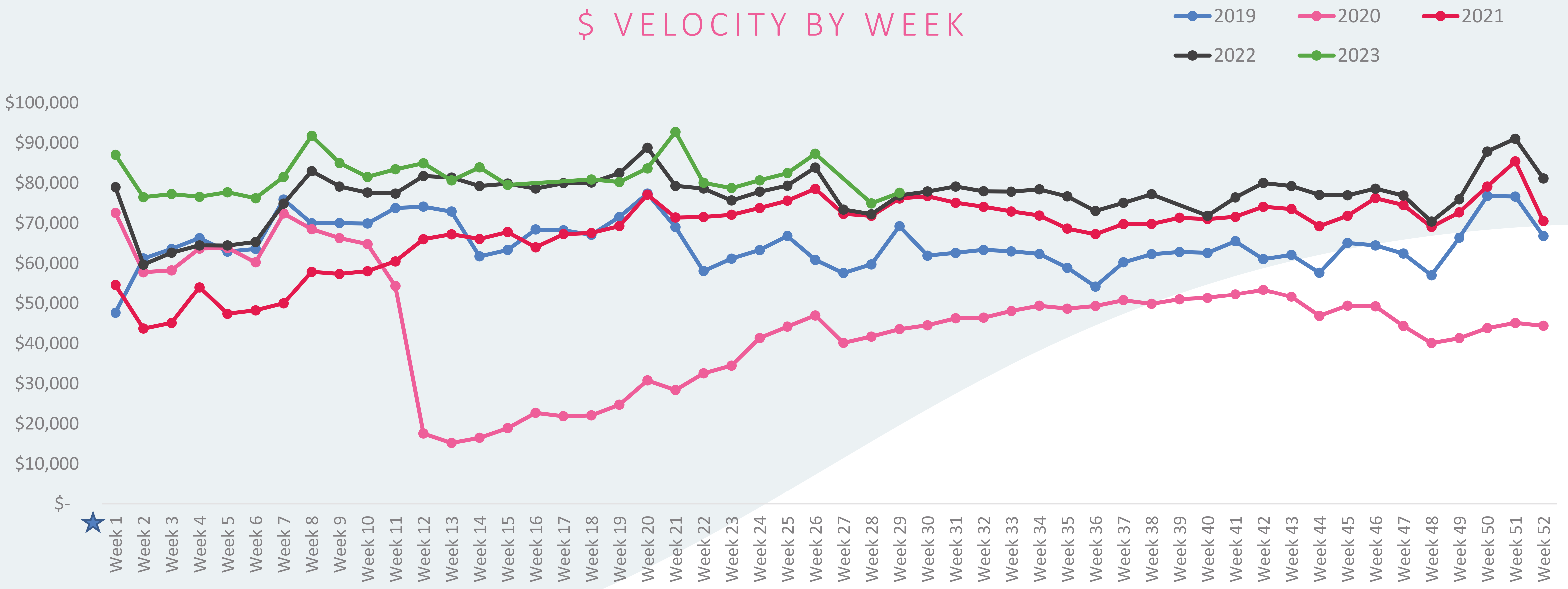
KEY INSIGHTS

- With growth of +4% in the latest week, velocity for the US On-Premise remains slightly above that of last year (+1%).
  - Trends in the most recent week are driven by an increase in both traffic (+2%) and check value (+2%).
  - While check value remains ahead of last year (+3%), ticket count continues to be slightly behind the same week in 2022 (-2%).
  - Florida (+4%) and New York (+3%) are the best performing states vs last year, while Illinois (-6%) remains slightly behind 2022 velocity.
- Independence Day on Tuesday July 4 affected the US On-Premise, resulting in a double-digit velocity increase on the Monday (+35%) Tuesday (+47%) and Wednesday (+38%) of that week, vs the previous week.
  - On July 4 itself, the strongest uplift was seen in California, up +73% vs the previous Tuesday, with all key provinces experiencing double-digit uplifts.
  - This growth in velocity was driven by an increase in traffic, with ticket counts for total US up +66% vs the previous Tuesday.

SOURCE: BEVERAGETRAK

TOTAL US MARKET SALES: RECAP

With similar weekly trends to last year, velocity remains slightly above that of 2022



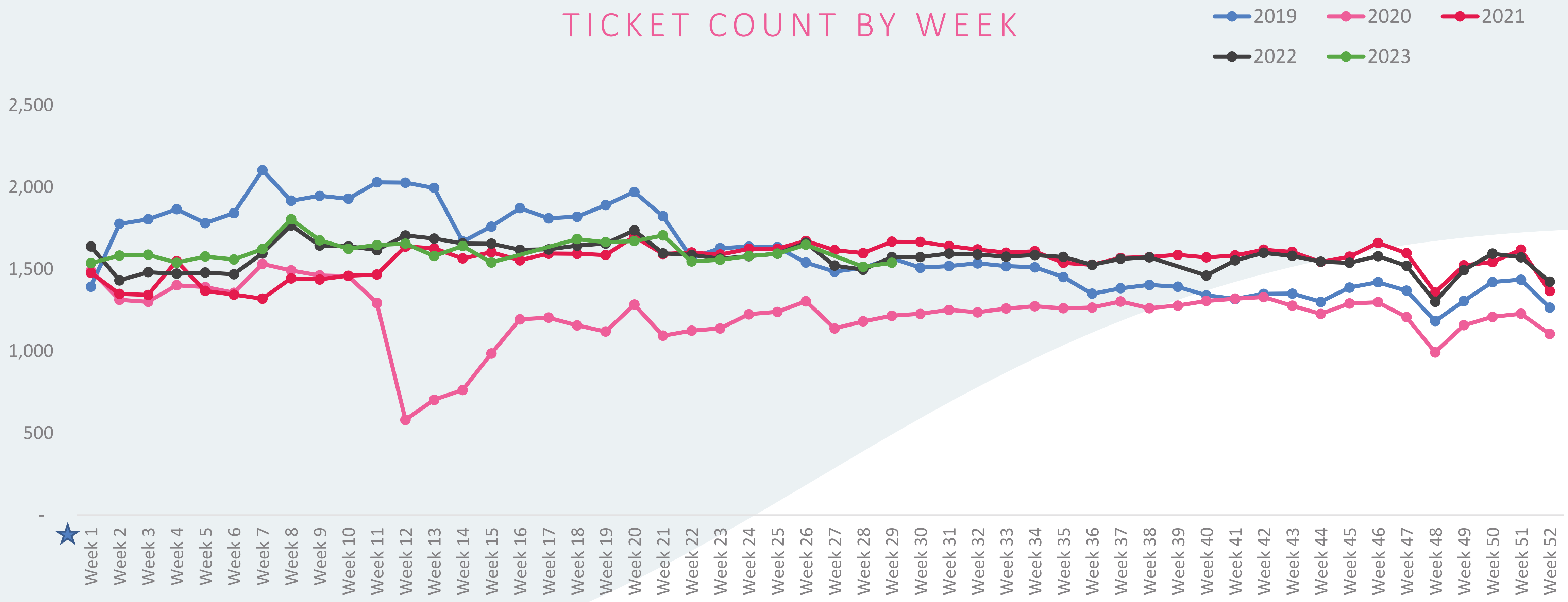
★ Exact dates can be found in the appendix

SOURCE: BEVERAGETRAK

• N.B. Incomplete data for week 39 2022 and week 16, 17 & 27 2023

TOTAL US MARKET SALES: RECAP

Ticket counts continue to follow a similar pattern to previous years



★ Exact dates can be found in the appendix

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SOURCE: BEVERAGETRAK

- N.B. Incomplete data for week 39 2022 and week 16, 17 & 27 2023

NEW YORK STATE

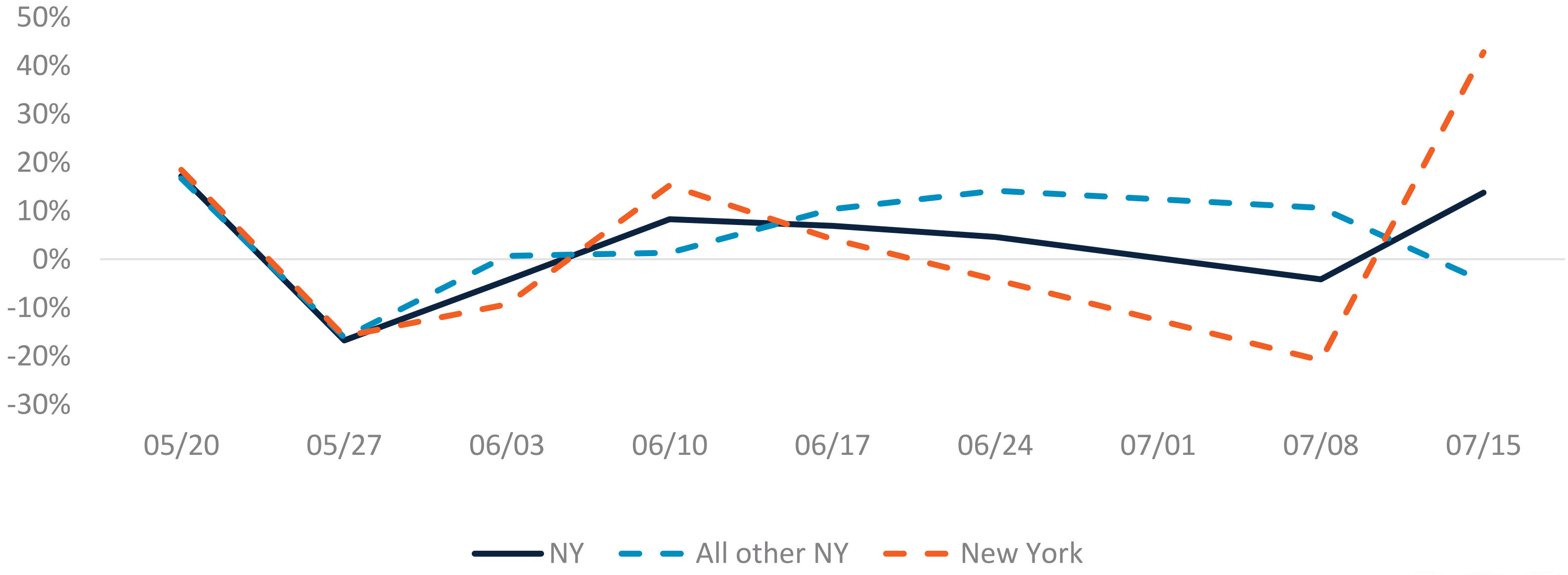
+3%

v July 16 2022

+14%

v July 8 2023

$ VELOCITY % CHG - WEEK ON WEEK

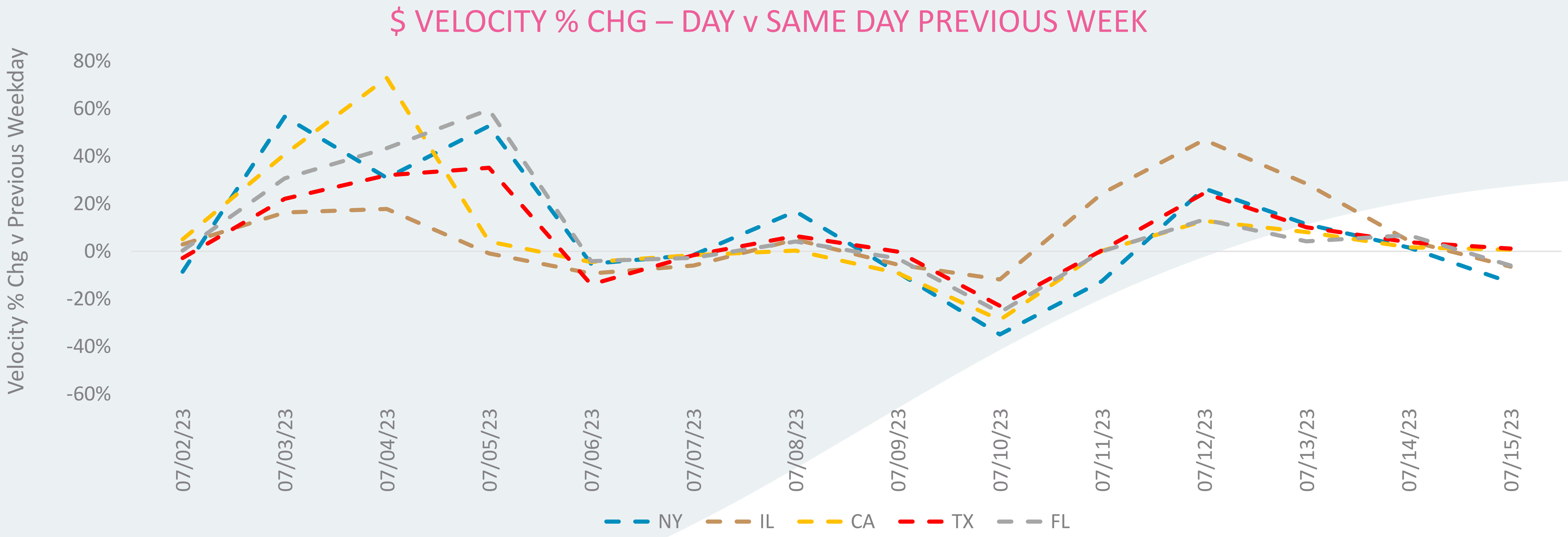


SOURCE: BEVERAGETRAK

N.B. Incomplete data for 07/01/23

DAILY VELOCITY

Independence Day on Tuesday July 4 affected the US On-Premise, resulting in a double-digit velocity increase on the Monday (+35%) Tuesday (+47%) and Wednesday (+38%) of that week, vs the previous week.



N.B.

% Chg v Previous Same Weekday: Change in Velocity v the same weekday in the previous week. E.g. Monday this week v Monday last week

SOURCE: BEVERAGETRAK

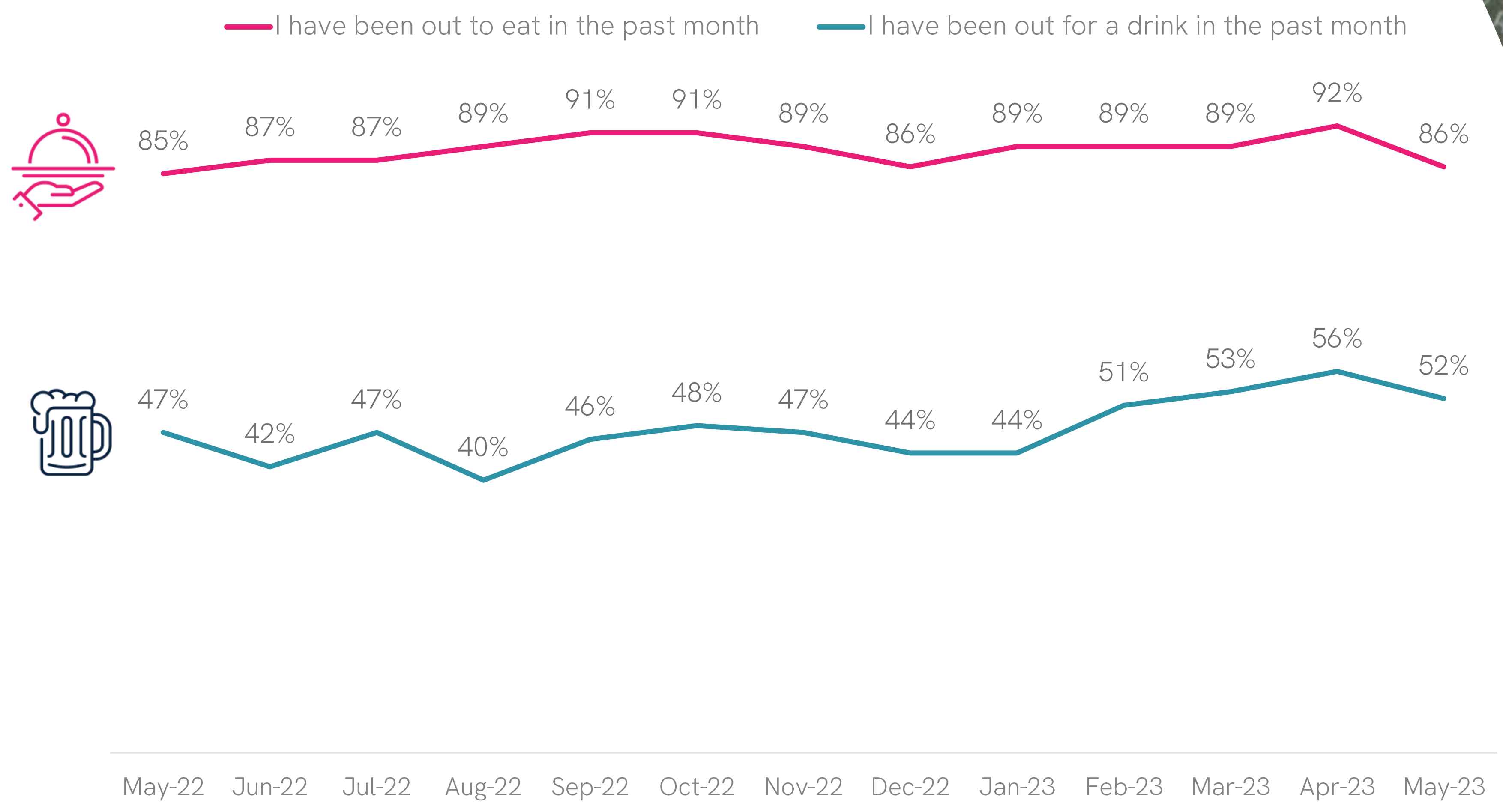
Consumer Pulse Report
Examples of the report

AUSTRALIAN ON PREMISE CONSUMER PULSE REPORT

CGA by NIQ, May 2023

WHICH OF THE FOLLOWING STATEMENTS APPLY TO YOU?

Visitation in the over the past month

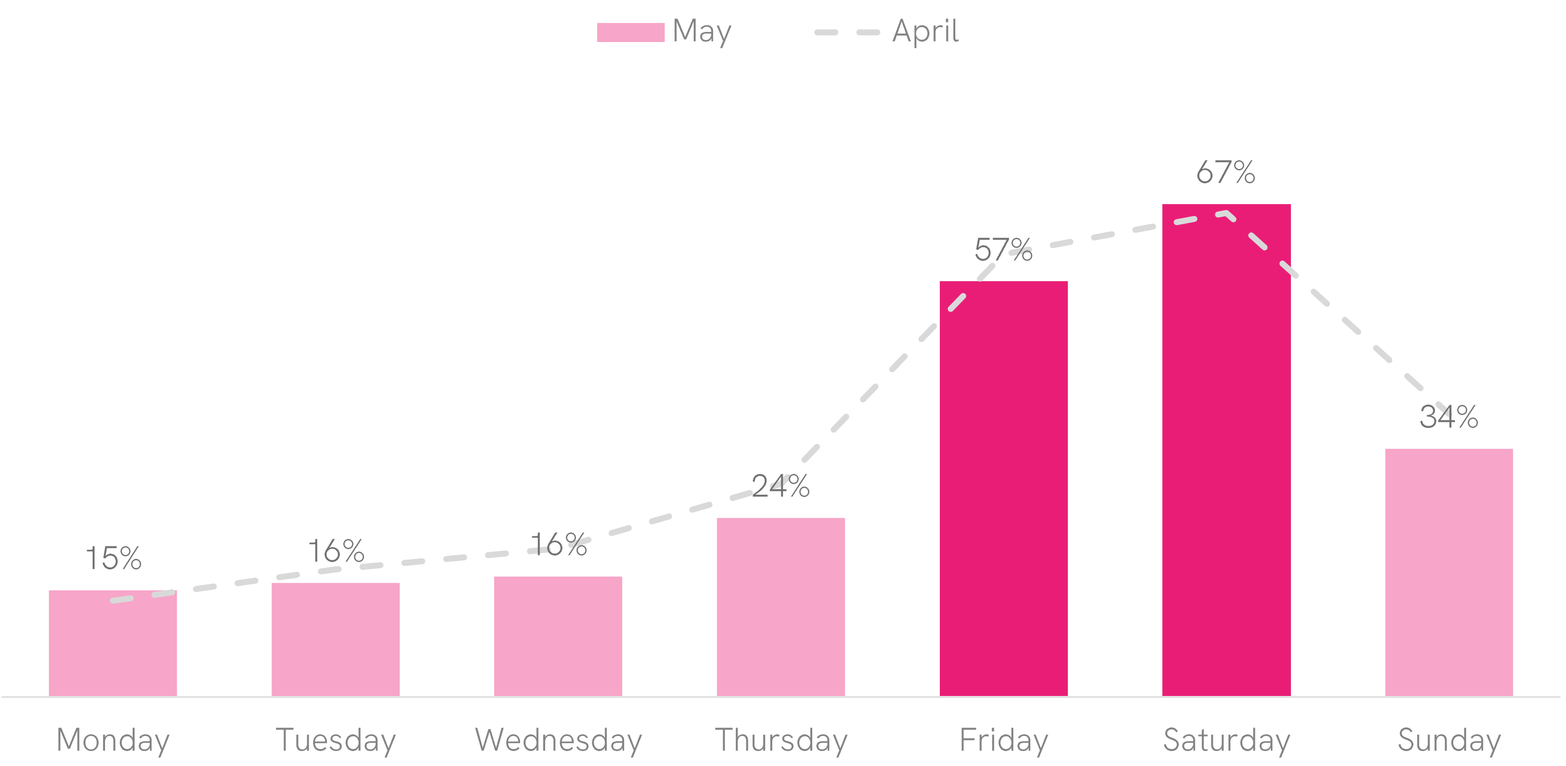


7% haven't visited the On Premise this month

Tracked Metrics

ON WHICH DAY(S) OF THE WEEK HAVE YOU VISITED A BAR, RESTAURANT OR OTHER SIMILAR VENUE OVER THE PAST MONTH?

Days of the week visited



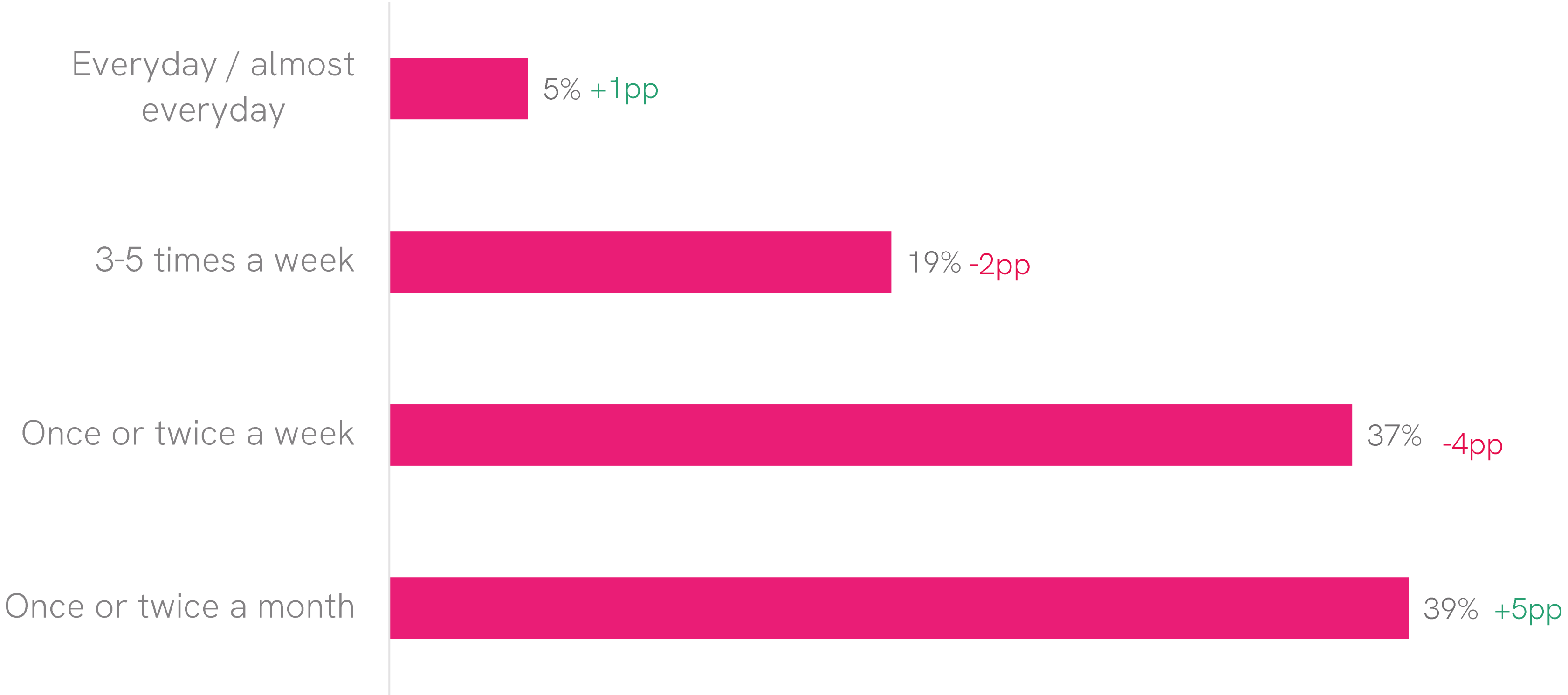
Tracked Metrics

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2023 – SAMPLE: 700

CGA Powered by NIQ

HOW OFTEN HAVE YOU VISITED BARS, RESTAURANTS AND OTHER SIMILAR VENUES OVER THE PAST MONTH?

Visiting habits (vs March)



Tracked Metrics

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2023 – SAMPLE: 700

HOW DOES YOUR CURRENT BEHAVIOUR COMPARE TO HOW FREQUENTLY YOU USUALLY GO OUT?

Change in frequency of visitation

36%
Going out more often
-5pp vs Apr

34%
Going out the same
-1pp vs Apr

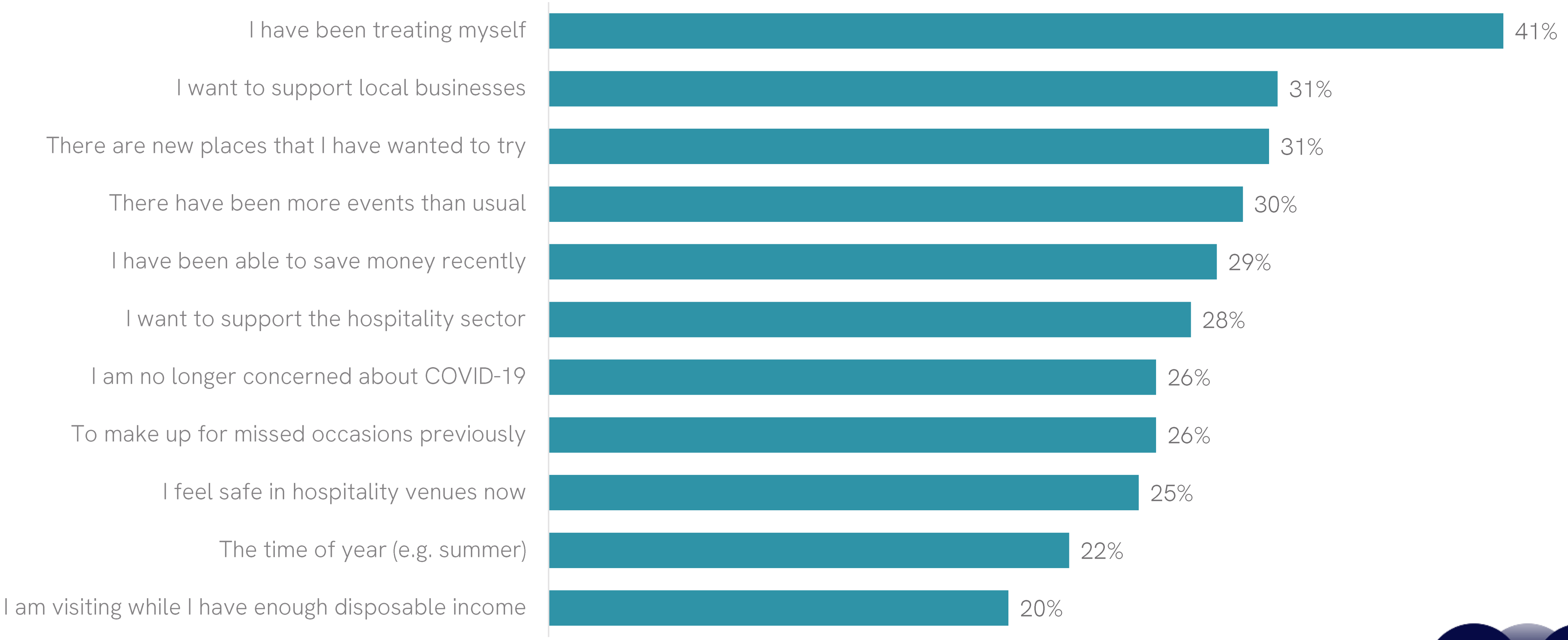
31%
Going out less often
+6pp vs Apr

Tracked Metrics

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2023 – SAMPLE: 752

YOU HAVE SAID THAT YOU ARE CURRENTLY GOING OUT MORE FREQUENTLY THAN USUAL, WHY IS THIS?

Reasons for going out to the on premise more frequently than usual



Tracked Metrics

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2023 – SAMPLE: 269

SUMMARY: TOPLINE VISITATION & INTENTION

- Following a positive April, visitation to the On Premise appears to have returned to more "typical" levels over the past month, with slight drops in both the numbers visiting the channel and the frequency of visitation too.
- The drop in frequency has mainly come at the expense of drink-led visits, whilst frequency of food-led visits remains in a strong position.
- Cost of living concerns continue to be, by far, the main factor driving reduced visitation, with price increases to food and drink in the On Premise coming secondary to this.
- On the flip side, consumers who are increasing their frequency of visit are primarily doing so to treat themselves, but are also invested in supporting the sector and trying new places.
- Alcoholic ginger beer and energy drinks are the greatest over-indexing categories this month compared to the yearly average.

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35%

Of all Australian consumers choose to drink wine when visiting venues primarily to eat

Hot Topic

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT APRIL 2023 - SAMPLE: 752

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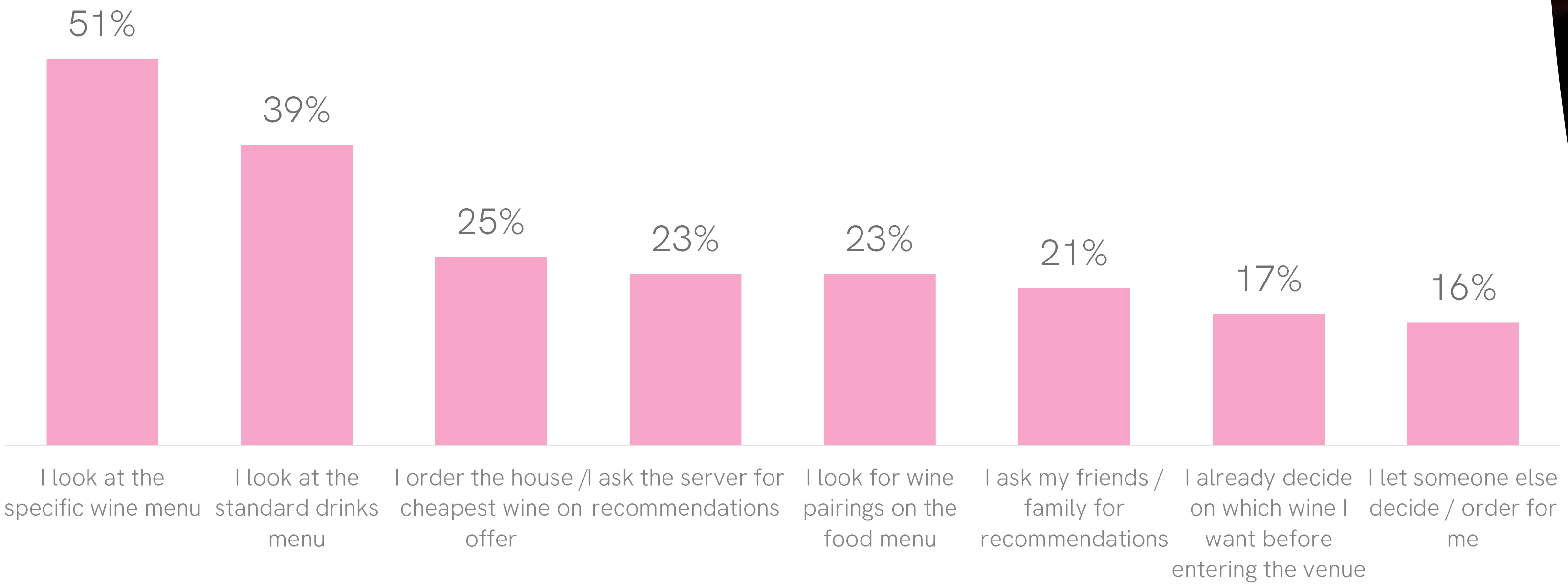
YOU HAVE SAID THAT YOU TYPICALLY DRINK WINE WHEN VISITING A VENUE PRIMARILY TO EAT. HOW DO YOU TYPICALLY DECIDE WHICH WINE TO ORDER?

Wine factors that are taken into account when ordering in a food-led venue



Hot Topic

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2023 – SAMPLE: 266

62%

Of those who drink wine on food-led occasions consider pairing their wine with the food

Hot Topic

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2023 - SAMPLE: 266

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WHICH OF THE FOLLOWING DO YOU TYPICALLY USE TO HELP YOU DETERMINE YOUR WINE AND FOOD PAIRINGS WHEN EATING OUT?

Factors used to help decide which wine and food pairings to consume

73%

I decide for myself

34%

Wine menu recommendations

33%

Staff recommendations

30%

Friends/family recommendations

Hot Topic

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2023 – SAMPLE: 164

HOT TOPICS…

WINE ON FOOD-LED OCCASIONS

- Food-led occasions provide a particularly important opportunity for wine, with over 1/3 of all Australian consumers typically drinking the category when visiting the On Premise to eat.

- Menu is a hugely influential touchpoint for the wine category, with a stand alone wine menu being the most utilised touchpoint. Suppliers will want to work with operators to optimise design to communicate the right information and position their products well. Consumers are primarily focussed on finding a serve within their budget, but also want to understand the country of origin and varietals available to make an informed decision – both key pieces of information to form menu design around.

- Consumers aren't actively looking for wine / food pairings when eating out, but are open to considering what wine best suits their meal. This is where staff can be proactive in their recommendations and making this information prominent on menu can lead to high value serves to be chosen.

- Ultimately, consumers will make the final call on what wine serve best suits their occasion, so it's key to be optimising touchpoints along the path to purchase and before the point of ordering to be able to influence this decision.

CGA by NIQ data sources

Consumer Research

CGA by NIQ survey 750 On Premise consumers situated across all Australian states, every 4 weeks.
Consumers must typically visit On Premise venues at least once within a 3-month period and be aged 18+.

Sales Metrics

The data in this report is fed by CLiP which is CGA's check level insights pool of outlets across Australia.
Data in CLiP is received through point of sales (POS) systems in all outlets; these outlets send through hundreds of attributes for every ticket that is processed including:

- *Date and time for every ticket*
- *All items as it is entered in the POS system including drinks, food and non food*
- *Tips, tax and discounts on tickets*

This data is matched and uploaded into databases by CGA's dedicated coding and development teams in house, allowing CGA to provide a read of sales across a host of products levels, aligned with Nielsen coding levels.

CGA by NIQ

Core solutions

CGA BY NIQ CONSUMER TOOLS

Additional Consumer Reporting where CGA by NIQ's expertise can be leveraged

CUSTOM RFP SUPPORT DECKS

Take chain-specific sales stories to your national account customers to speak to their consumers and showcase how your portfolio aligns with their strategies

OPTIMUM ASSORTMENT

CGA's assortment tool allows you to enable your teams to showcase the optimal range for outlets and highlight where brands should be placed within a range to achieve highest sales and increase customer satisfaction

PATH TO PURCHASE

Understand the decision corridor consumers go through when purchasing products, and identify how these choices impact the decisions that result in final sales

CONSUMER SEGMENTATION

Strategically and effectively target specific On Premise drinkers to identify offerings and opportunities that relate to them, ensuring $ are spent more effectively in On Premise brand building

CUSTOM RESEARCH

From online surveys to focus groups and in-outlet interceptions, CGA has access to millions of consumers across the world to answer your most important questions

BARTENDER RESEARCH

Bartenders and servers are the final touch point of influence in the channel. With such change, understanding advocacy and bartender needs is extremely important in influencing the sales of your products

CGA BY NIQ ON PREMISE SOLUTIONS

Essential Services to support your On Premise Strategies

OPUS

CONSUMER INSIGHTS

+ Robust insights tracking behaviour, habits, and preferences of consumers in the On Premise
+ Understand brand and category consumption to build selling stories for your portfolio
+ Highlight channel visitation and national account engagement to support your key account teams and conversations with retailers

Outlet Index

ON PREMISE SEGMENTATION

+ Understand the size and shape of the Australian On Premise
+ Build strategies catering to the ever-changing outlet dynamics shaping the channel
+ Determine which channels are in growth or decline
+ Integrate Outlet Index to better your conversations with distributors and retailers

OPM

ON PREMISE MEASUREMENT

+ Statistically robust model providing volumetric measurement of alcohol sales in bars and restaurants
+ Use as a barometer for Brand and Category performance in any market
+ Track KPIs such as brand and category share, competitive benchmarking, volume and value velocity (Rate of Sale), total distribution points and price

BeverageTrak

ON PREMISE SALES DATA - SPIRITS & BEER

+ Diagnose sales dynamics of your brands and categories in the On Premise channel
+ Identify the why's and how's' influencing sales performance by province for granular and targeted analysis
+ Track average check values, ticket counts, and velocities of products to benchmark your portfolio vs competitive sets

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2023 STRATEGY

PLAN YOUR 2023 STRATEGY

CGA by NIQ's defining purpose is to build unique services which help our clients to offer better solutions to the trade, to sell more product and to more easily navigate a difficult and complex channel. 2023 brings many opportunities for the channel and for suppliers, retailers and distributors alike.

To continue to deliver the most effective solutions, we want to stay aligned with your priorities and business challenges, to ensure our solutions are designed to add the most value possible to you and your teams.

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Contact Us

To learn more or to speak to a member of the team,
please feel free to get in touch:

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