



CGA by NIQ On Premise Consumer Pulse Report

In-depth analysis, exploring current trends, behaviours and engagement of On Premise consumers across New Zealand





CGA by NIQ Consumer Pulse Reports

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

*Exploring consumer insights and data, the report **allows you to:***

- + Gain an in-depth understanding of New Zealand On Premise consumers
- + Keep a pulse on consumer trends and hot topics
- + Determine the opportunities presented to you within the beverage and hospitality industry

On Premise Consumer Pulse Report delivery

CGA by NIQ's On Premise Pulse Reports help suppliers and manufacturers 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.



+ On Premise Consumer Pulse Report, delivered monthly

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

Full subscription access: \$5,000 p.a.*

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



For non-subscribers: Pulse Snapshot Report

A snapshot, providing topline key metrics of the full On Premise Consumer Pulse Report is available for free to all Pulse subscribers.

Consumer Pulse Report

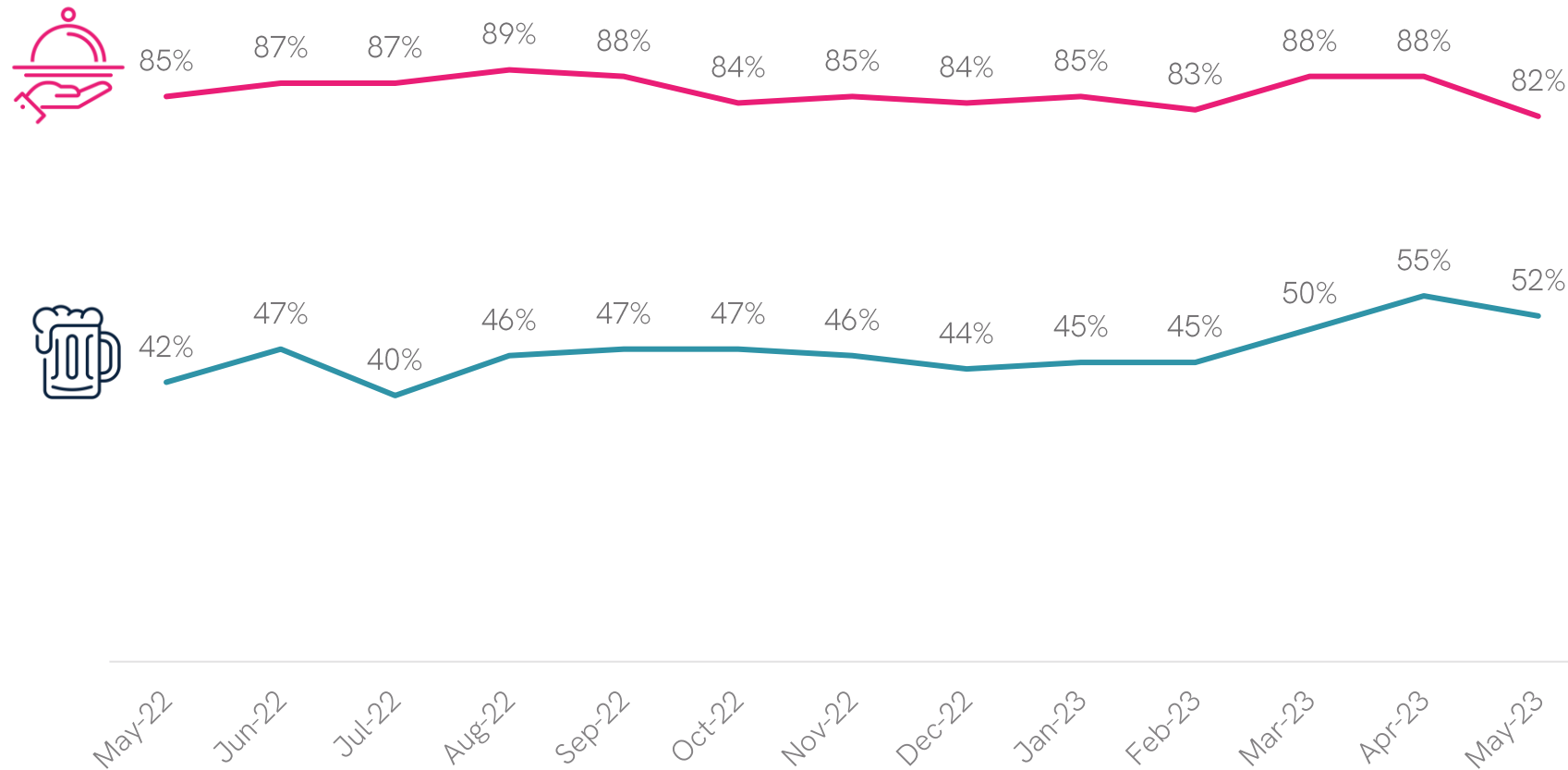
Examples of the report



WHICH OF THE FOLLOWING STATEMENTS APPLY TO YOU?

Visitation in the over the past month

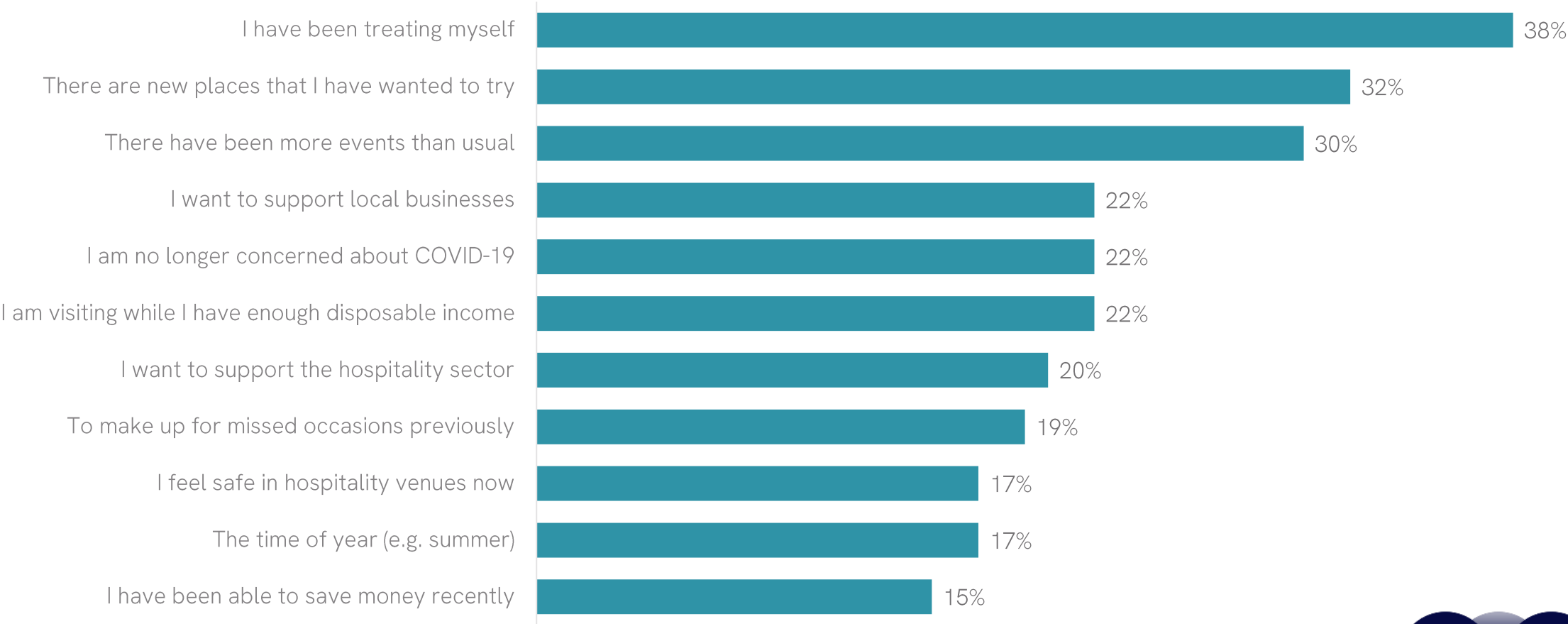
— I have been out to eat in the past month — I have been out for a drink in the past month



9% haven't visited the On Premise this month

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

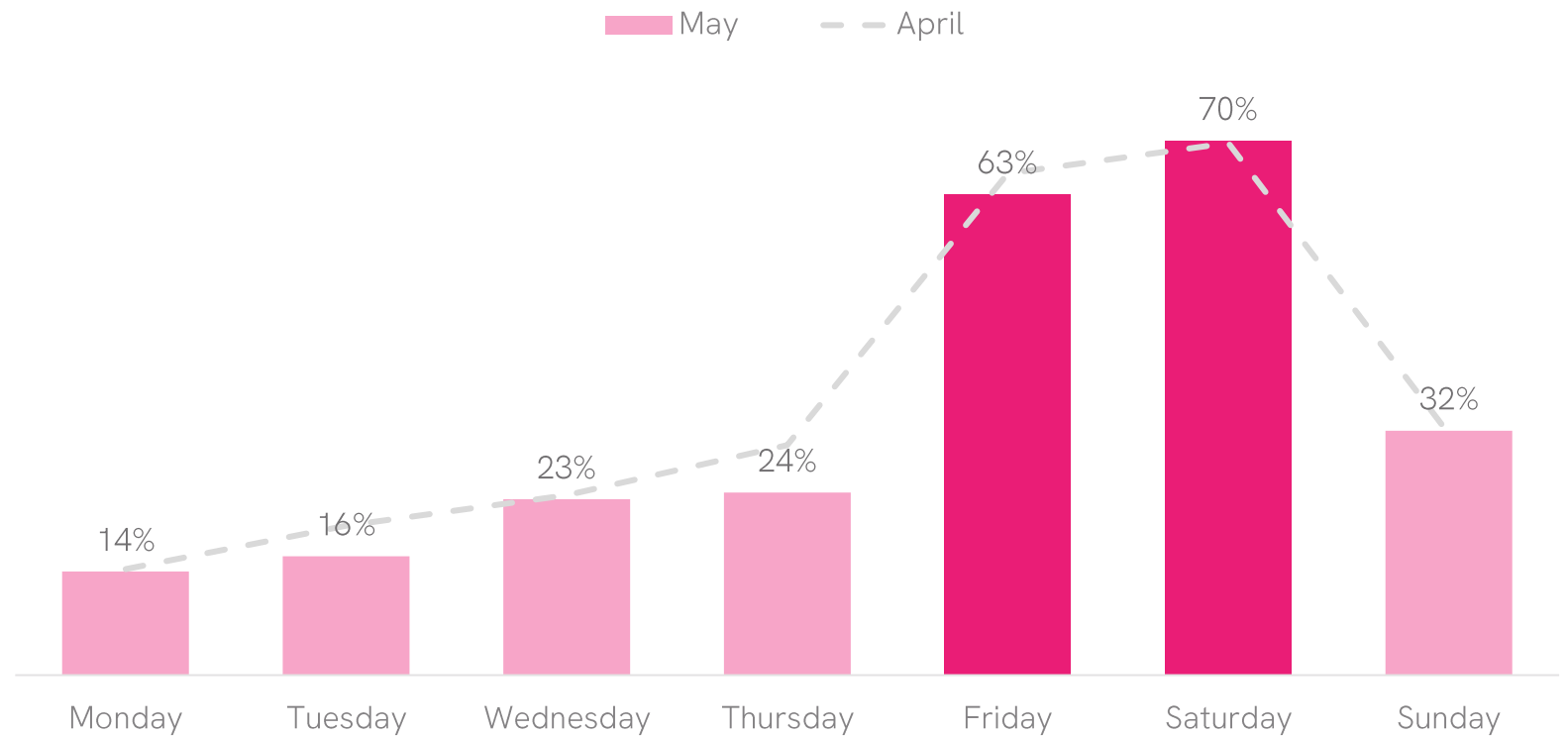
Reasons for going out to the on premise more frequently than usual





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

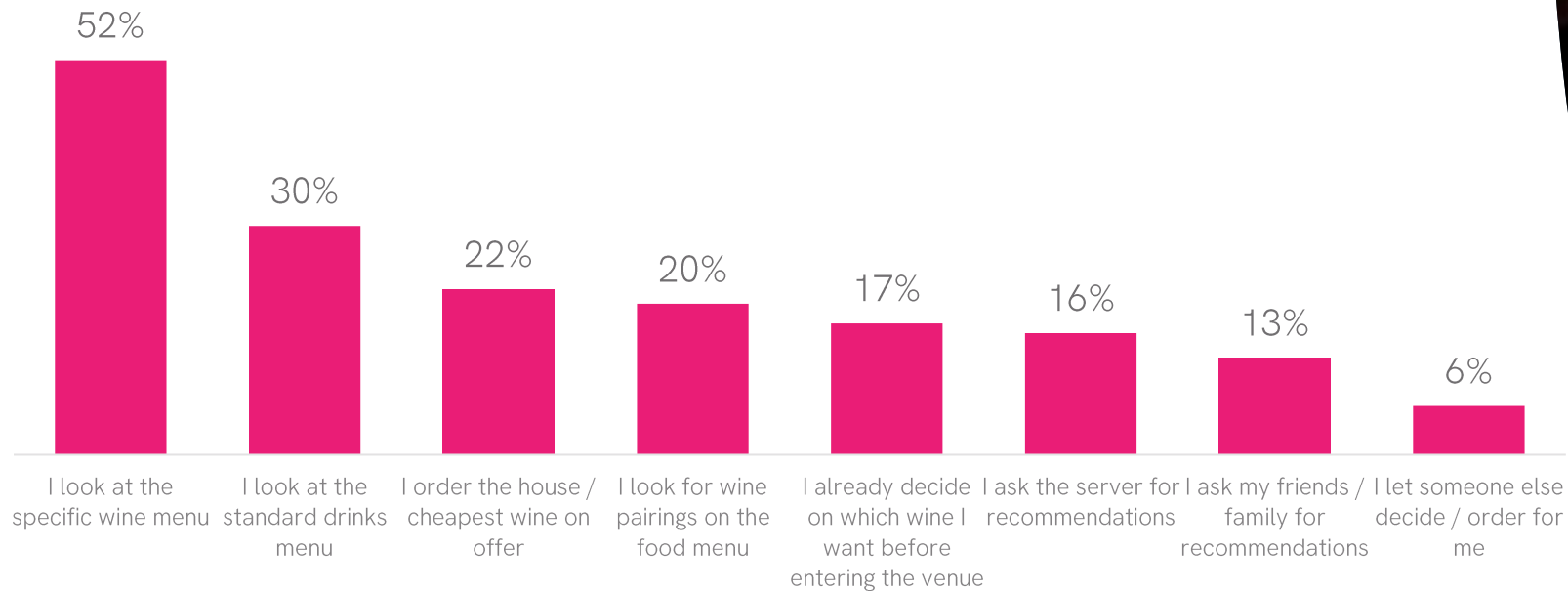


SUMMARY: TOPLINE VISITATION & INTENTION

- Overall visitation to the On Premise this past month has decreased across both food and drink-led occasions. However, plans ahead for future food-led visitation are predicted to stabilise.
- We are seeing a slight shift in On Premise behaviour, as those reporting to be going out less often than usual have increased by +6pp vs April.
 - Treat occasions have been predominantly driving increased frequency in visitation.
 - The cost-of-living increases continues to have a significant impact on decreased frequency of visitation. We also see a slight increase in consumers reporting to have less disposable income than usual which is having a negative impact on frequency of visitation.
- Drink consumption has been positive across most categories over the past month, with above average consumption seen in RTDs, spirits, cocktails and energy drinks.

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: 156



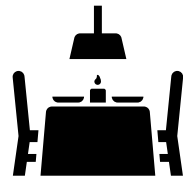
WHICH OF THE FOLLOWING ASPECTS DO YOU TAKE SUSTAINABILITY/ETHICAL CREDENTIALS INTO ACCOUNT, WHEN EATING AND DRINKING OUT?

When sustainability/ethical credentials are taken into account



48%

Deciding what food to order



42%

Deciding which venue I visit



30%

Deciding what drink I order

35% of consumers selected 'none of the above'

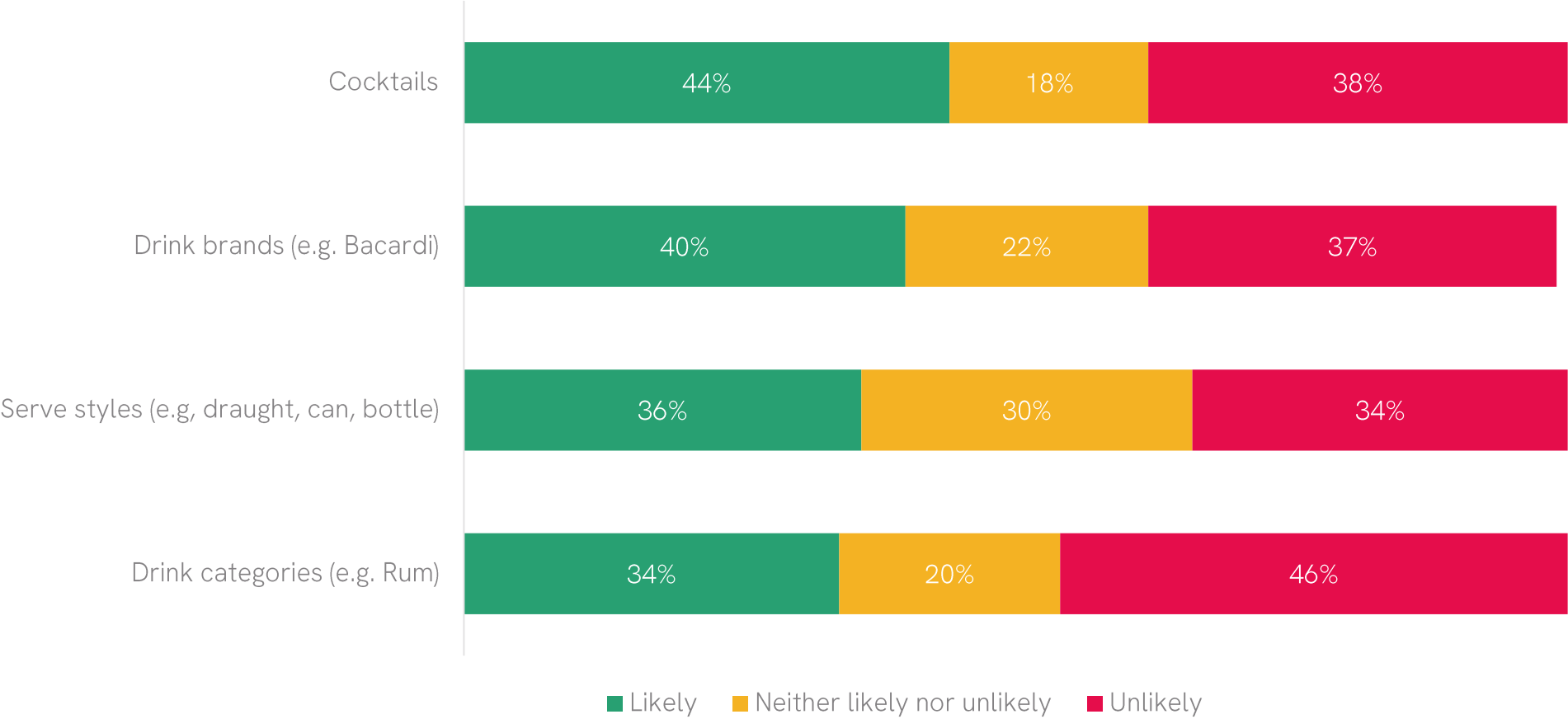
Hot Topic

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT APRIL 2023 - SAMPLE: 500



WHEN VISITING BARS, RESTAURANTS AND SIMILAR VENUES DURING THE SUMMER, HOW LIKELY ARE YOU TO EXPERIMENT WITH ...

Likelihood to experiment with the following in the On Premise over the summer



- Food-led occasions provide a particularly important opportunity for wine, with just under 1/3 of all New Zealand consumers typically drinking the category when visiting the On Premise to eat.
- A stand-alone wine menu is the most common touchpoint used by wine consumers to decide which wine to order, when dining out.
 - A collaboration between wine suppliers and operators to enhance the design for their wine menus ensures optimal product positioning and volume growth.
- Consumers are primarily concerned with choosing a serve that fits within their budget, but they also value the place of origin and the grape varieties available, in order to make an informed choice—two important details to base menu design around.
- Half of wine consumers when dining out, consider which wine will go best with their meal. And almost half of these utilise wine menu recommendations to help them decide on wine x food pairings, reiterating the importance of offering influential information on the menu that can result in high-value serves.

CGA by NIQ data sources

Consumer Research

CGA by NIQ survey 500 On Premise consumers situated across all New Zealand regions, every 4 weeks. Consumers must typically visit On Premise venues at least once within a 3-month period and be aged 18+.

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



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



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



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



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



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 New Zealand 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



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.



Contact Us

To learn more or to speak to a member of the team,
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