



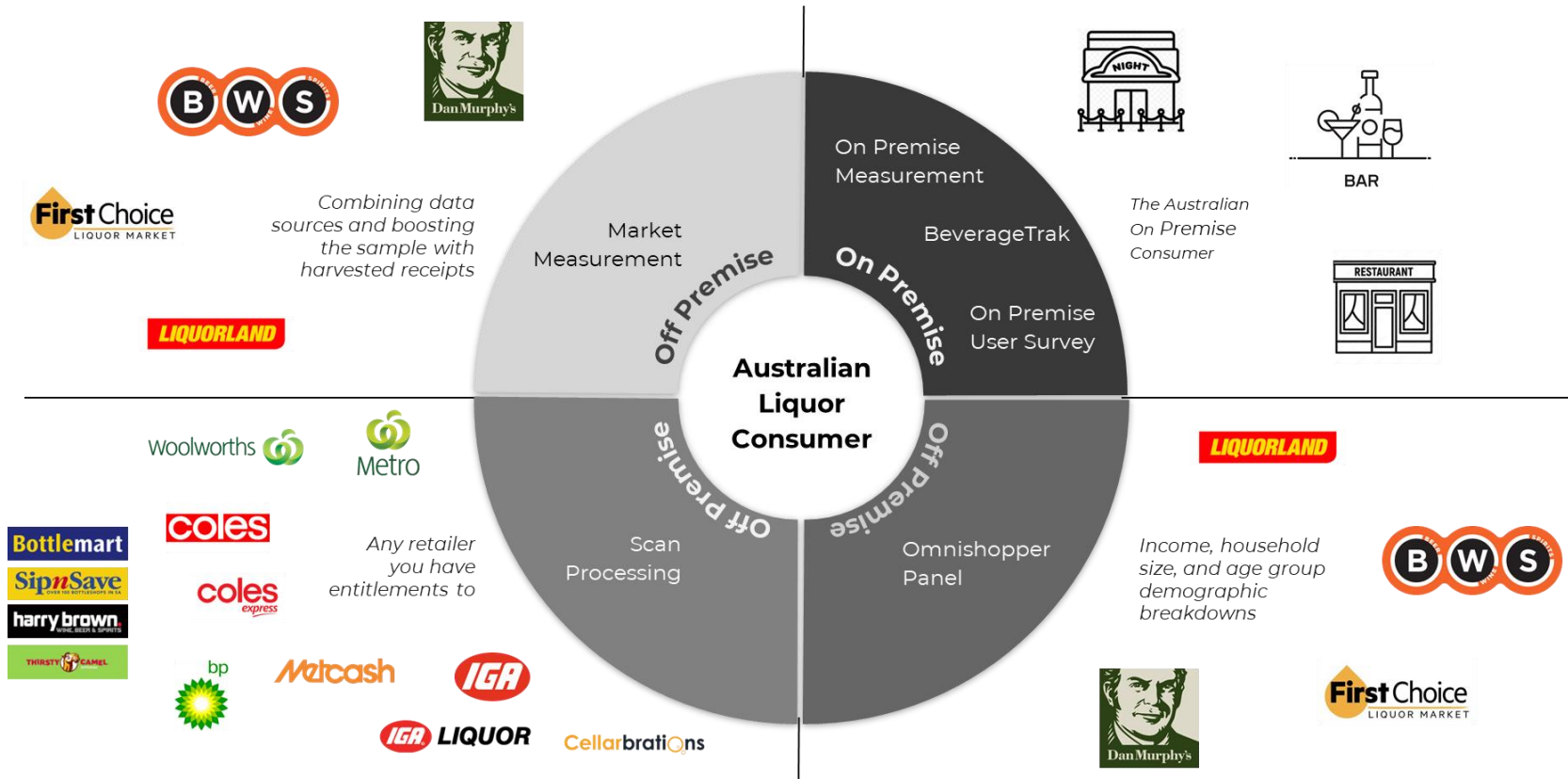
CGA by NIQ Now Pouring OPM

Volumetric measurement of alcohol sales in bars and restaurants across Australia



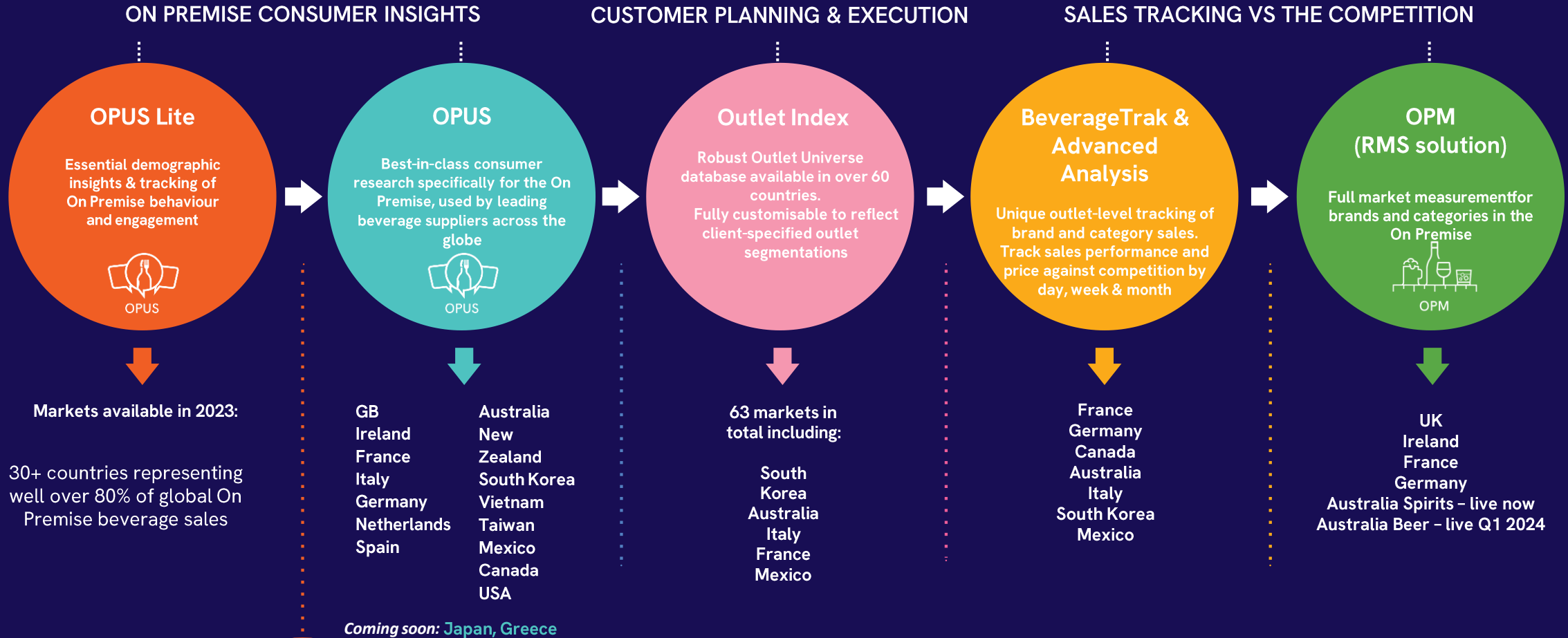


Delivering the Full View of the Liquor Consumer



CGA's On Premise Development Toolkit

This suite of solutions is designed to help beverage suppliers grow their On Premise sales via commercially-focused insights and customer profiling data. Over time, this phased approach leads to full market measurement (RMS) and competitive share tracking



What is OPM?

“What does it do and why do you need it?”



On Premise Measurement (OPM)

Best-in-class On Premise market measurement

CGA's On Premise Measurement service is the only fully projected, extensively validated measure of beverage alcohol performance in the On Premise.

Using a combination of their best-in-class data sources to provide an industry barometer for brand and category performance across Australia.

OPM provides in-depth volumetric measurement of alcohol sales in bars and restaurants across the market, **OPM can answer your important questions such as:**

- + What is my market share by major market & class of trade?
- + What regions am I growing the fastest in against other regions/Total Australia and vs my competitors?
- + What is the distribution headroom between me and my competitors?
- + How does my brand performance compare to last year or the year before?
- + Which markets do I need to give most attention to, to become the leader in the category?



OPM

Measuring your success in the On Premise

What can OPM do for you...

- + Explore spirits and beer categories by sub-category, manufacturer and brand family & extension which are in over 35,000 outlets in Australia
- + Analyse data by volume, value, distribution, ROS and PCW
- + Split data by Total Australia, States (NSW, Queensland, Victoria, Western & South Australia, Northern Territory, Tasmania), and Cities (Sydney (greater metro), Brisbane, Melbourne)
- + Channel segments including Bar restaurant, casual/fine dining, bar, pub, hotel, club
- + All includes double data breaks
- + Look at the data over **4-week time periods** which can be aggregated up to quarters, years etc. 3 years back data (6-week lag).



Facts

Value



AUD\$ sales

Volume



9L EQ Spirits
Litres Beer

Distribution



Total distribution points

Price



Average price per serve

OPM is the definitive read of sales for all major suppliers, distributors and financial service companies across GB, Ireland, France & the USA

DIAGEO



OPM Australia: Phase 1 summary

Phase 1 template replicates our successful reporting structure in other markets

Ready to launch in Q4 2023



Channels: High value (alcohol)

- + Alcohol selling outlets
 - + **Drinking** (Bar/Pub/Nightclub)
 - + **Dining**



Facts: Basic

- + Value (\$), Volume, Distribution, Avg. Price, ROS



Markets: High interest

- + Total Australia
- + State & Region Splits: **New South Wales, Queensland, Victoria, Western & South Australia**
- + Syndicated Major Markets:
 - + **Sydney, Brisbane, Melbourne**



Products

- + Category, Manufacturer and Brand Level reporting;
 - + **Beer (including FMB/Ciders)**
 - + **Spirits**



Periodically: 4-weekly view

- + 4 Weekly data periods
- + Aggregates to 4, 12, 52 week views



Delivery: Alongside RMS



Whiskey, Cordials and Rum witnessed the largest price increases in spirits vs last year

Source: US On Premise Measurement
SAMPLE SLIDE

Average price per serve % increase 2023 vs. 2022 (1.5oz)

Gin Tequila Cognac Vodka Rum Cordials Whiskey



| | | | | | | | |
|------|-------|-------|-------|-------|-------|-------|-------|
| 2023 | +3.6% | +3.8% | +3.9% | +4.6% | +5.1% | +6.1% | +7.0% |
| 2022 | +3.0% | +4.9% | +4.0% | +2.8% | +6.1% | +3.5% | +3.6% |

Red: Price increase of 10% and above **Amber:** Price increase of 5%-9.9% **Green:** Price increase of 4.9% and below

Source: CGA by NIQ On Premise Measurement: Mega Category, Category, 1.5oz EQ, Average Price, Average Price % Chg vs YA - Rolling 52 W/E 08/12/2023, 08/13/2022



With the exception of Import, Beer prices increased by over +10% over the L52 weeks

Source: US On Premise Measurement
SAMPLE SLIDE

Average price per serve % increase 2023 vs. 2022 (12oz)



Red: Price increase of 10% and above **Amber:** Price increase of 5%-9.9% **Green:** Price increase of 4.9% and below

Source: CGA by NIQ On Premise Measurement: Mega Category, Subsegment, 12oz EQ, Average Price, Average Price % Chg vs YA – Rolling 52 W/E 08/12/2023, 08/13/2022

Your preferred On Premise measurement partner

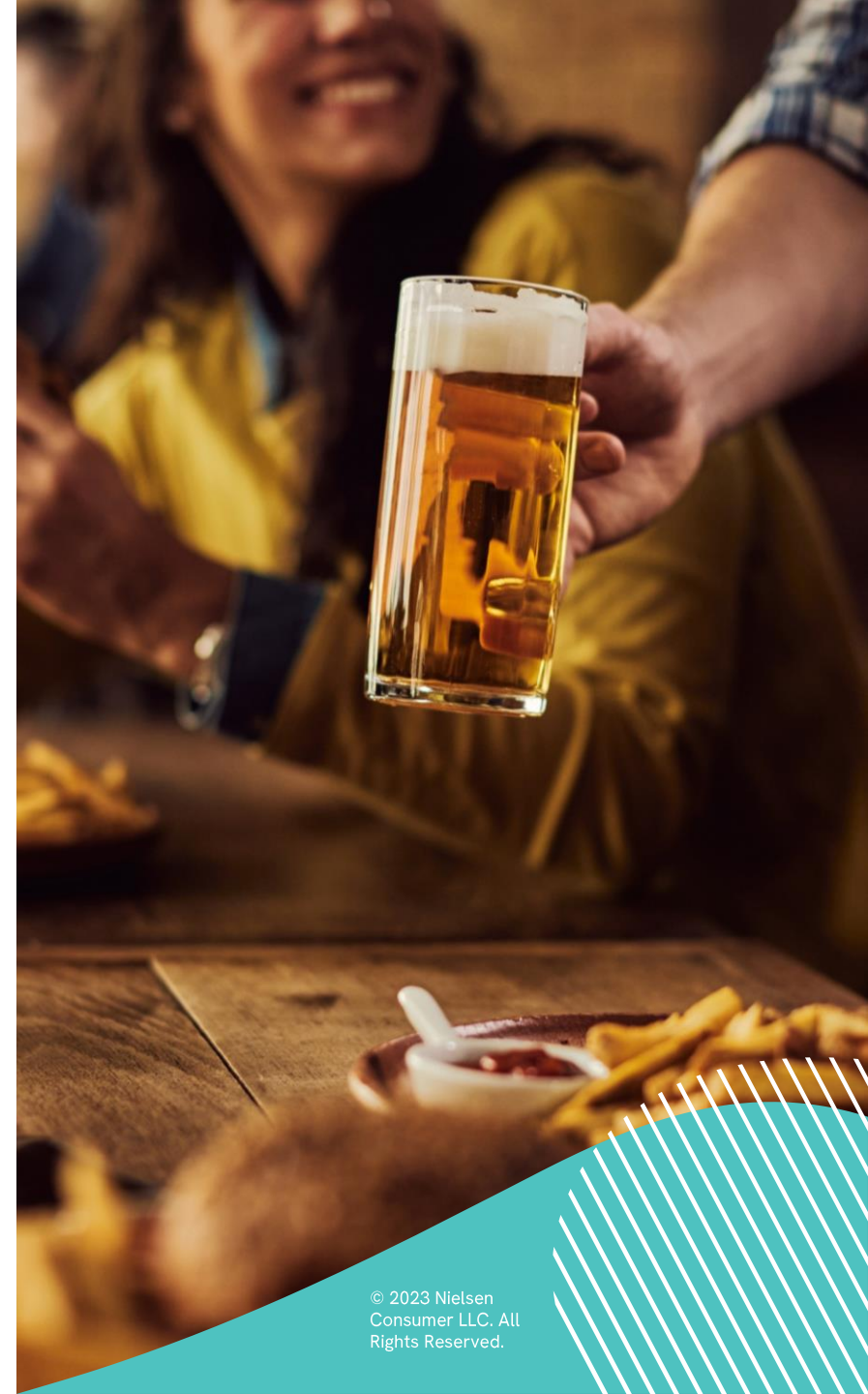
CGA's OPM service is the only fully projected, extensively validated, measure of beverage alcohol performance in the Australian On Premise. Used to track share and trends by all of the leading beverage suppliers, OPM is the most robust view of sales performance for bars and restaurants ever produced in Australia.

Exclusive data: OPM provides access to highly validated data from a sample-based measurement of the market. This delivers actionable insights for business growth including competitor analysis and category management.

Accurate benchmarking: Analyse the latest sales data at category and brand level for hyperlocal benchmarking aligned to markets, states and cities. OPM makes it simple to evaluate performance across segments and regions.

Market share & trends: Understand the wider market dynamics that will impact your business. Using OPM's highly targeted data, brands can assess how current trends have evolved and identify new trends that have emerged.

On Premise expertise: CGA's On Premise triangulation of data coupled with experts who leverage their knowledge and understanding of the sector, allows for robust analysis and delivery of highly valuable insights to clients to support their brand strategies.



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



BeverageTrak

ON PREMISE SALES DATA

- + 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



OPM

ON PREMISE MEASUREMENT - SPIRITS & BEER

- + 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



Enhancing your On Premise 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. 2024 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.

Find out how your business measures in the Australian Market

For more information on how OPM can benefit your business, contact a member of our team:



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