



CGA by NIQ **On Premise Measurement (OPM)**

*Volumetric measurement of alcohol sales in bars and restaurants
across Canada*

OPM: Benchmarking sales performance in the On Premise Channel



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

DIAGEO



CAMPARI



Moët Hennessy USA

Beam SUNTORY



Morgan Stanley

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.

OPM uses a combination of best-in-class data sources to provide an industry barometer for brand and category performance across Canada.

OPM provides in-depth volumetric measurement of alcohol sales in bars and restaurants across the market, and **can answer your important business 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 Canada 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?



Bringing **light** into the **dark** **spaces** of reporting with OPM

OPM is the **only solution in Canada** that can track sales performance out of bars and restaurants to consumers.

Until now, Canada's On Premise data was disparate through tracking shipments to locations, with limited reporting across facts and regions.

Following other markets globally, most notably in North America where it's been the industry leading solution in the US for the last 8+ years, now, beverage suppliers will be able to view performance across North America together for the very first time with one centralized reporting solution that tracks across the same time periods.



OPM Canada

Replicating our successful reporting structure in other markets



Products:

- + Brand, Category, Subcategory, Manufacturer Level Reporting



Markets:

- + Total Canada
- + Provinces: **Ontario, Quebec, British Columbia, Alberta, Atlantic, Prairies**
- + Cities:
 - + **Toronto, Montreal, Vancouver, Calgary, Edmonton, Ottawa*, Quebec City***



Channels:

- + Alcohol selling outlets
 - + **Drinking** (Bars/Nightclubs)
 - + **Eating** (Fine Dining/Casual Dining)
 - + **Double Data Breaks** (Toronto Drinking, Montreal Dining, etc.)



Facts:

- + Volume, Value, Distribution, Price, Velocity, Share



Outputs & Deliveries:

- + 4 Weekly Reporting
- + 6 Week Reporting Lag
- + Delivered in NIQ Discover Platform
- + PPT & Excel Reporting Included
- + Spirits Database Live December 2023
- + Beer Database Live February 2024

*What Makes OPM unique in Canada is that it is the only solution that tracks sales performance **out of bars and restaurants to consumers**, as opposed to other data sources which only track shipments to locations with limited reporting by both facts and regions*

On Premise Measurement Reporting & Capabilities



Distribution
Analysis



Distribution &
Volume Headroom
Analysis



Regional
Reports



Brand
Health Checks



Contribution
to Change
(what is driving
performance)



Category
Deep Dives



Competitor
Analysis



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

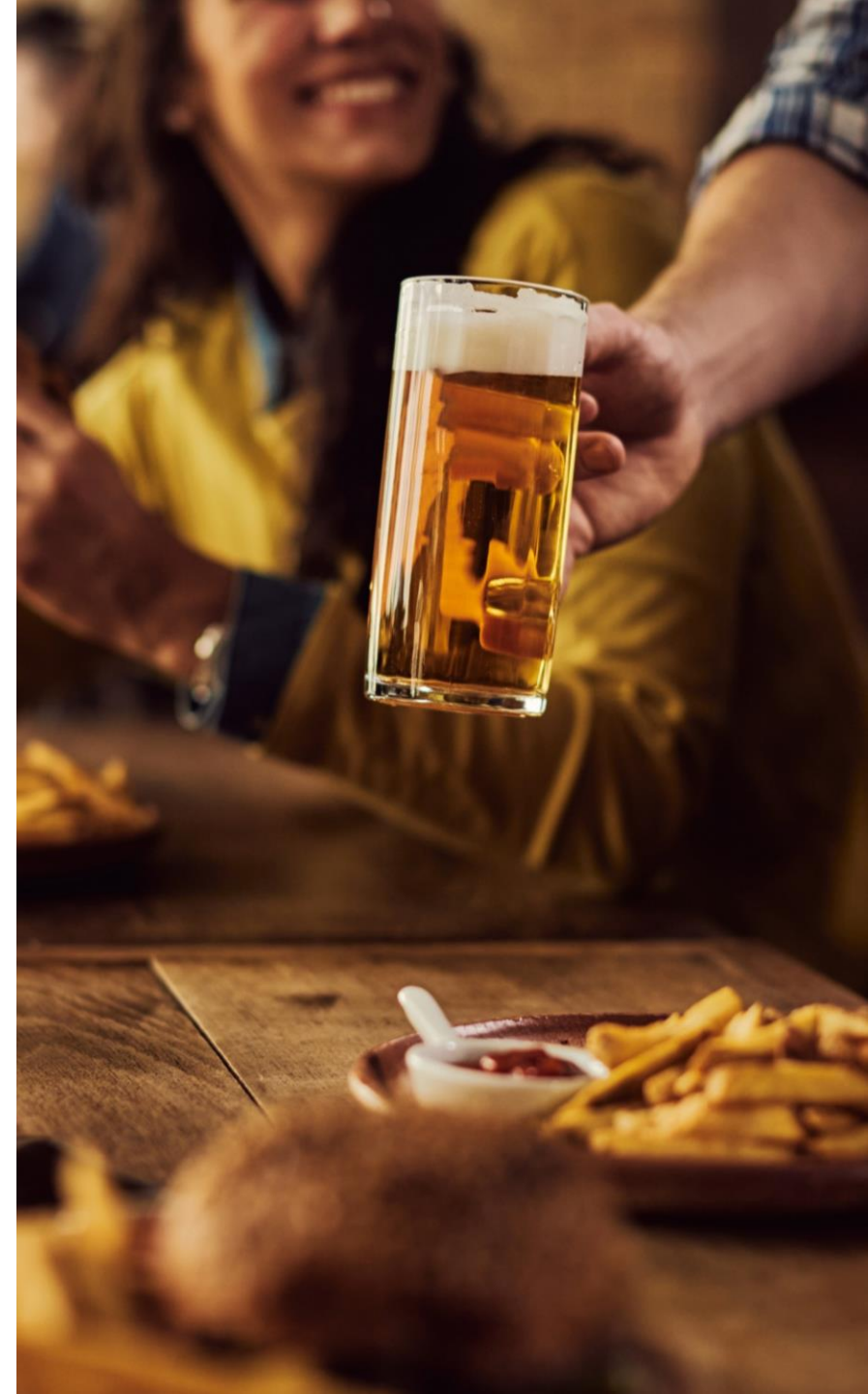
CGA's OPM service is the only fully projected, extensively validated, measure of beverage alcohol performance in the Canadian On Premise. Used to track share and trends by all of the leading beverage suppliers, OPM is the most robust view of sales performance out of bars and restaurants ever produced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

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, provinces 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 Canadian On Premise
- + Build strategies catering to the ever-changing outlet dynamics shaping the channel
- + Determine which channels are in growth or decline
- + Customize your segmentation of the On Premise to grow your called on accounts a view the entire On Premise channel by how your business does



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 Canadian Market

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



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