

CGA by NIQ

Unlocking essential Beer category insights for growth

Consumer & market measurement of alcohol sales in bars and restaurants across Italy

CGA BY NIQ ON PREMISE SOLUTIONS

Essential Services to support your Italy On Premise Strategies



OPUS

Consumer Insights

- + Build unique, compelling, sales stories by channel and brand
- + Understand brand engagement, serve styles, and consumer preferences by channel and occasion
- + National account RFP support drives revenue and fosters strong operator partnerships
- + Key topic syndicated reports and custom projects provide guidance for complex business cases
- + Ability to gain exclusive insights through custom questions*

Available now



Outlet Index

Locational strategy and execution

- + A comprehensive and robust database of all licensed On Premise outlets
- + Understand size and shape of the universe to refine sales targeting, drive listings and increase market share
- + Ability to align segmentation of the market to your internal definitions across brand, marketing & sales functions
- + Prioritize most valuable opportunities and gain salesforce optimization

Available Now



OPM

Sales Performance

- + Industry leading Spirit, Beer, and Wine volumetric (L) & sales (\$) measurement
- + Barometer for brand and category performance & benchmarking
- + Understand consumer category interaction, and profile the consumer who is driving your On Premise volume
- + Robust high-level data designed for central insights, brand and category teams, and C-suite

Coming Soon



Strengthening On Premise insights for the Italian beverage industry

CGA continues their full market measurement journey in Italy with a foundational toolkit of data and insights which make a consequential and positive difference to brand strategy, investment tactics and share growth.

Launching a new *industry-first Beer Report*, customisable for your brands, CGA provides access to unprecedented insights allowing brands to comprehensively profile market share performance, benchmarked against competitors, through a triangulation of CGA's proprietary, rich data sources.

Being armed with category-specific and commercially-focused insights in this dynamic market gives beverage suppliers the expert support to win sales and grow share in the On Premise.

Powered by CGA's best-in-class OPUS and OPM services



OPM



OPUS



Beer Report: Unlocking essential Beer category insights

Measure and track your On Premise market share

- Understand total share at a manufacturer, brand family and brand level.
- Measure and identify significant changes in share by quarter

Profile the consumer who is driving your On Premise volume

- Unprecedented ability to split total On Premise volume share by consumer profile (age, gender, region), including double breaks

Understand consumer category interaction through CGA OPUS Beer category insights

- Why are consumers choosing to drink beer, in which venue types, on which occasions and what drives decision choices?

Profile your brands and your consumers

- Who is the brand family drinker in the On Premise and what are the overlaps between your individual products and who are your biggest competitors



What the report will cover:

1. Total Beer Overview

Understand total beer performance in the Italian On Premise vs Spirits and wine, uncover headroom opportunity, frequency of consumption, beer share by region, and demographic profile.

2. Who is the Beer consumer

Deep dive into beer performance by demographic – understand consumption by age, gender, location and those impacted by cost of living crisis. Identify brands that over index by age group and the drivers to brands. Identify outlet types where beer is most likely to be consumed.

3. Channels and Occasions

Understand where and why beer is consumed. Identify the biggest opportunities for beer by outlet type and by occasion as well as understand consumer need states on key occasions.

4. Beer Trends

Deep dive in to two hot topics in the beer category – Craft beer and No and Low to unlock opportunities in these key growth areas.

5. Brand Repertoire Analysis

Evaluate brand loyalty and changes in consumer preferences year on year.

6. Manufacturer and Brand share

Analyse brand share at total Italy, regional and demographic levels, including top brands.

7. Brand Health Insights

Assess brand performance vs a competitor set of your choice. Compare market share and brand equity measures.

8. Brand Drinker Profile

Understand the channels, occasions and drivers for the target brand's consumers.

9. Draught vs Packaged Beer

Explore preferences for draught versus packaged beer.

Exploring your Beer brand performance in Italy

Measure your market share

Essential support in winning share

- + Understand total share and share splits by demographic to identify opportunities for growth and areas to compete
- + Measure and track share trends and changes regularly
- + Identify areas to optimise assortment and category strategies
- + Build segment and regional stories for targeted success
- + Optimise growth strategies and make informed investment decisions

Profile your Beer consumer

Full visibility of consumer category interaction

- + Understand who your brand and category drinkers are
- + Profile consumers who are driving your brand volume share by age, gender and region
- + Identify consumers' motivations for drink choice, in which venue they drink and on what occasions
- + Discover who your brand family drinkers are in the On Premise and overlaps between your products and competitors



Understanding your brand health

Brands can leverage Consumetric data to evaluate their performance, benchmark against competitors and strategise effectively to excel in the On Premise.

Metrics that you can analyse include...

- Volume share of beer brands – strongest and weakest regions
- Volume share split by gender and age
- Where and when your beer brand and competitors are being consumed
- Preferred serve styles by beer brand
- Factors influencing beer brand choice

Gain insights into how your brand measures up against competitors through a Brand Health Check

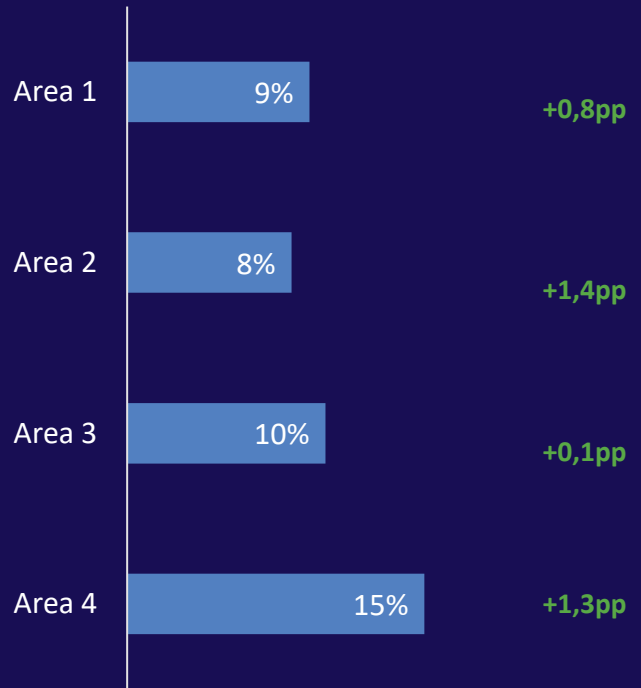


[Brand A] thrives nationwide in Italy, notably favoured by the 55+ demographic, prominent in Area 4

Source: CGA Italy Beer Report 2024
SAMPLE SLIDE

Brand Performance – Brand A

Brand A Share by Area | Indexes Volume share of Beer Q4 vs Q3

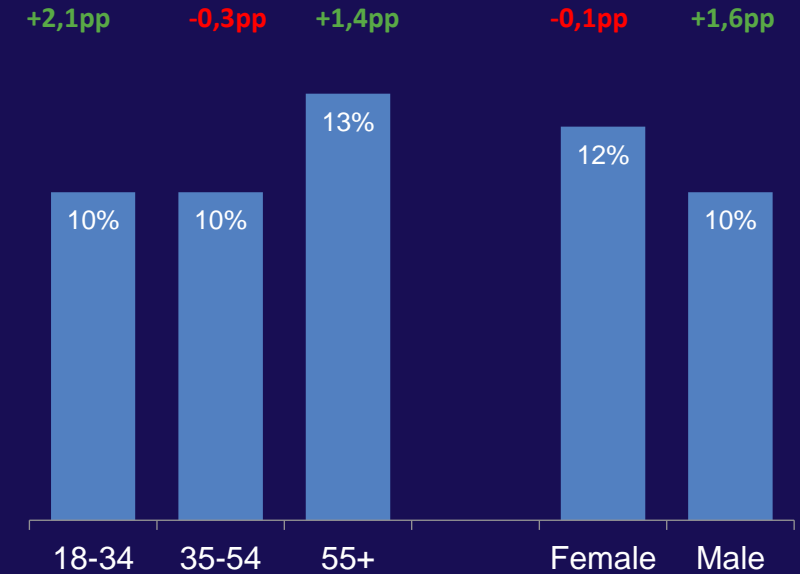


*NIQ Regions:

Area 1 – Lombardia, Piemonte, Liguria, Valle D'Aosta

Area 2 – Veneto, Trentino Alto Adige / Südtirol, Emilia-Romagna, Friuli-Venezia Giulia

Brand A Share by Gender & Age | Indexes Volume share of Beer Q4 vs Q3



*NIQ Regions:

Area 3 – Marche, Sardegna, Toscana, Umbria, Abruzzo, Lazio

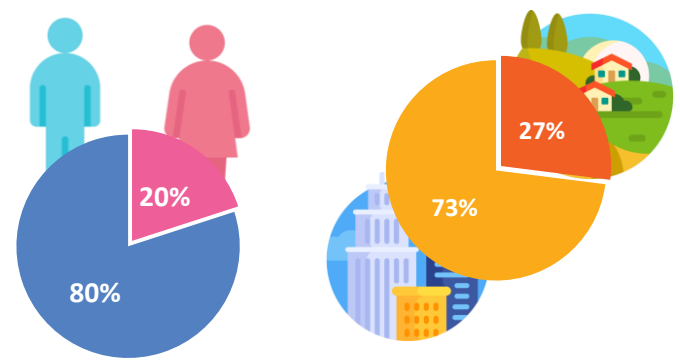
Area 4 – Molise, Puglia, Sicilia, Basilicata, Calabria, Campania



Source: CGA by NIQ ConuMetric Italy 2024

Suppliers should target strategy towards the next generation of beer drinkers, capitalising on wet-led channels and social settings

Who



Weekly visit

59% +9pp

Average monthly spend out of home

69 € -37 €

- Key take outs**
- 18-24 age group is more male-led
 - Brand A is the most over-indexing beer vs avg beer drinker
 - Venue A is over-indexing by a big portion

Top over-indexes vs average beer drinker

What

Local/Imported beer			
			Rank
Brand A	43%	+10pp	#2
Brand B	27%	+7pp	#6
Brand C	8%	+4pp	#20

Craft beer			
			Rank
Brand X	11%	+6pp	#3
Brand Y	10%	+5pp	#5
Brand Z	11%	+4pp	#4

When are beer consumers visiting

Relaxed / quiet drinks	42%	+7pp
High tempo drinks	15%	+4pp
To watch live sport on TV	15%	+3pp

Why

Friend recommendations	25%	+8pp
Marketing and celebrity endorsements of the brand	7%	+4pp
Advertisements in the venue	7%	+3pp

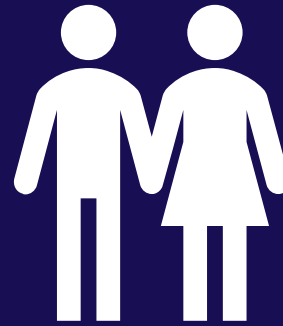
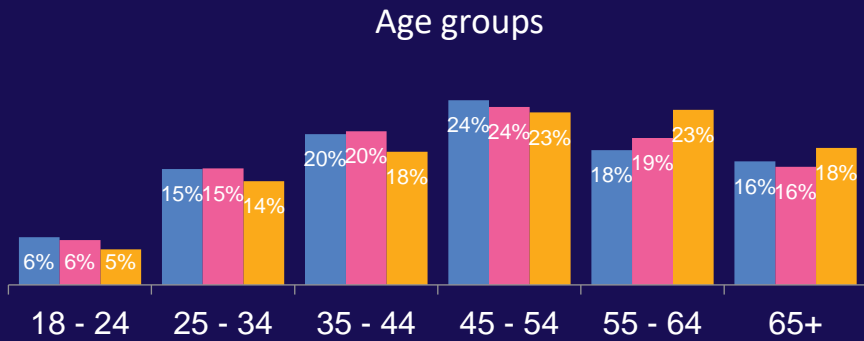
Where are beer consumers visiting

Venue A	47%	+19pp
Venue B	27%	+18pp
Venue C	56%	+15pp

[Brand B] drinkers are typically higher income males, with a higher spend on eating and drinking out

Source: CGA Italy Beer Report 2024
SAMPLE SLIDE

Brand A | Brand B | Brand C



Gender

Gender	Brand A (%)	Brand B (%)	Brand C (%)
Female	41%	43%	42%
Male	59%	57%	58%

Location of residence

Location	Brand A (%)	Brand B (%)	Brand C (%)
City/Town centre	69%	69%	63%
Rural/Suburban	31%	31%	37%

On Premise visitation

Frequency	Brand A (%)	Brand B (%)	Brand C (%)
Weekly	64%	64%	61%
Monthly	93%	95%	92%

Household income

Brand A	35,368 €
Brand B	36,299 €
Brand C	35,248 €

Spend OOH

Brand A	106 €
Brand B	109 €
Brand C	98 €

In Area 2, Brand A takes the lead in beer sales, with Brand B following in second place

Source: CGA Italy Beer Report 2024
SAMPLE SLIDE



Brands consumed by region | Area 2- Emilia-Romagna, Friuli-Venezia Giulia, Trentino-Alto Adige, Veneto

Top 5 brands per Area 2

#1
Manufacturer
BRAND A

#2 BRAND B

#3 BRAND C

MS
2023

	#1	#2	#3	#4	#5
	Brand A	Brand B	Brand C	Brand D	Brand E
	7,6%	7,5%	6,0%	4,3%	3,1%

Why CGA by NIQ?



On Premise specialisation: CGA's expertise in the On Premise sector is crucial for unlocking insights that truly make a difference. Generic insights are not valuable in this unique sector, and CGA's specialisation ensures the relevance and impact of the insights provided.



Comprehensive understanding of the category & market: CGA's Beer Report offers a complete and specialist view of the On Premise market and Beer category. By analysing consumer profiles and behaviour, category trends, venue types, brands, and occasions, it provides a comprehensive understanding that can be utilised by various teams within a business, from Field Sales to Category Development.



Built by On Premise experts: CGA's team consists of On Premise consumer research specialists who possess in-depth knowledge and understanding of the sector. They employ world-leading research techniques and leverage their expertise to deliver clear, actionable, and robust insights.



To access these
unprecedented insights, get
in touch:



Luca Gerosa

Sales Industry Leader

luca.gerosa@nielseniq.com

