



# On Premise Measurement (OPM)

*Know your market, outpace your competitors, and redefine success with first-ever On Premise market measurement*



**NIQ**



# 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 South Korea.

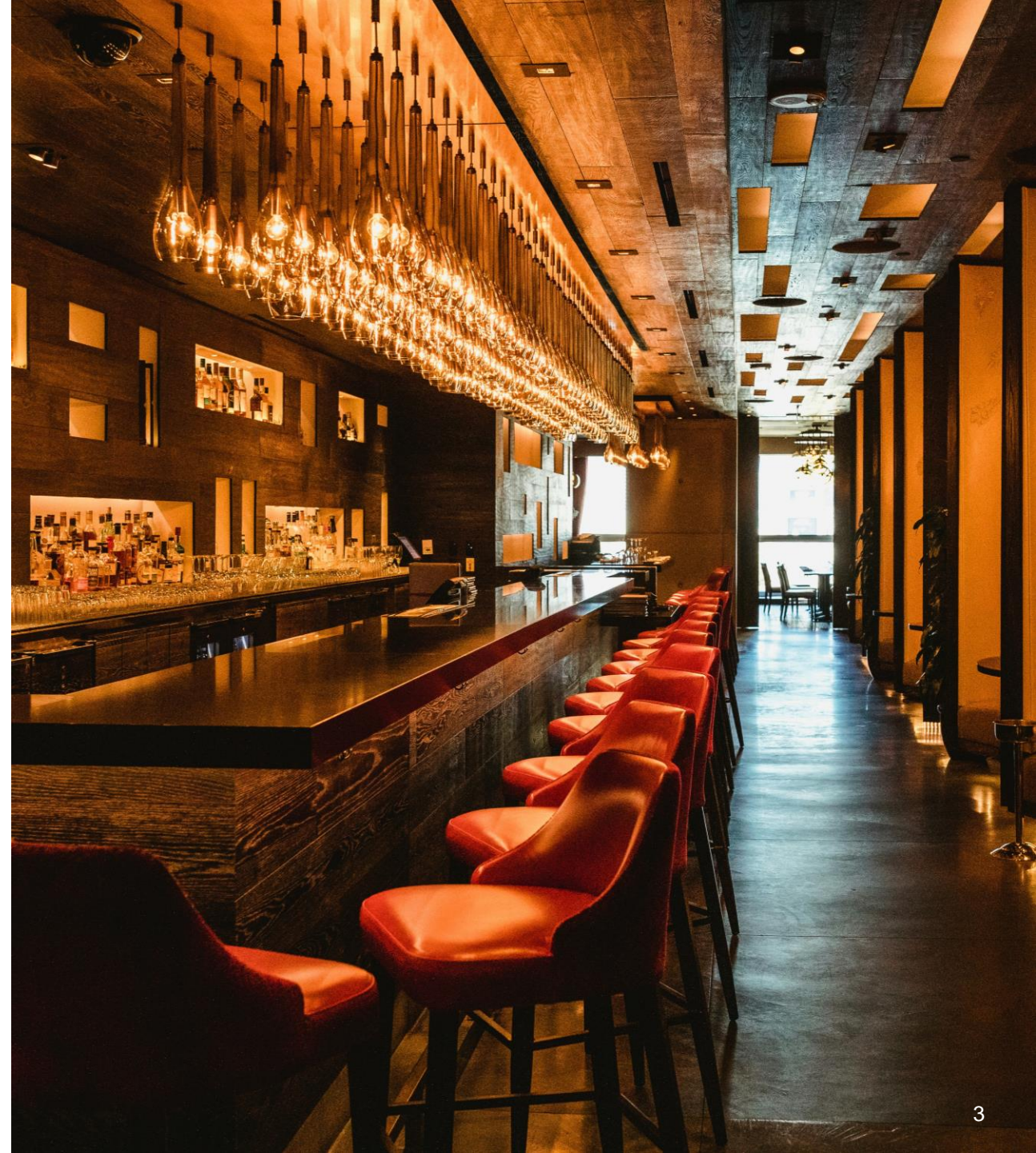
OPM provides in-depth volumetric measurement of alcohol sales in bars and restaurants across the market





# OPM can help you answer key business questions:

- + What is my market share by major market & class of trade?
- + What regions am I growing the fastest in against other regions/Total Korea 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? What area am I growing the fastest 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?





# Measuring your success in the On Premise

## *Insights to explore in OPM...*

- + Explore spirits and beer categories by sub-category, manufacturer and brand family & extension which are in over 200,000 outlets in South Korea
- + Analyse data by volume, value, distribution, ROS and price
- + Split data by Total Korea, States and Cities
- + Channel segments including Bar restaurant, Hof, casual/fine dining, bar, pub, hotel, night 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).



# OPM: Measuring your success in South Korea's On Premise

Replicating our successful reporting structure in other markets



## Products:

- + Brand, Category, Subcategory, Manufacturer Level Reporting



## Markets:

- + Total Korea
- + Province: 17 Province of Korea  
Busan, Chungcheongbuk-do, Chungcheongnam-do, Daegu, Daejeon, Gangwon-do, Gwangju, Gyeonggi-do, Gyeongsangbuk-do, Gyeongsangnam-do, Incheon, Jeju-do, Jeollabuk-do, Jeollanam-do, Sejong-si, Seoul, Ulsan



## Channels:

- + Alcohol selling outlets
  - + Drinking  
Drinking channels (Pub, Bars, Clubs)
  - + Eating  
Restaurant Cuisine Type (Western, Asian (Other), Chinese, Japanese, Korean)



## Facts:

- + Volume, Value, Distribution, Price, Share



## Outputs & Deliveries:

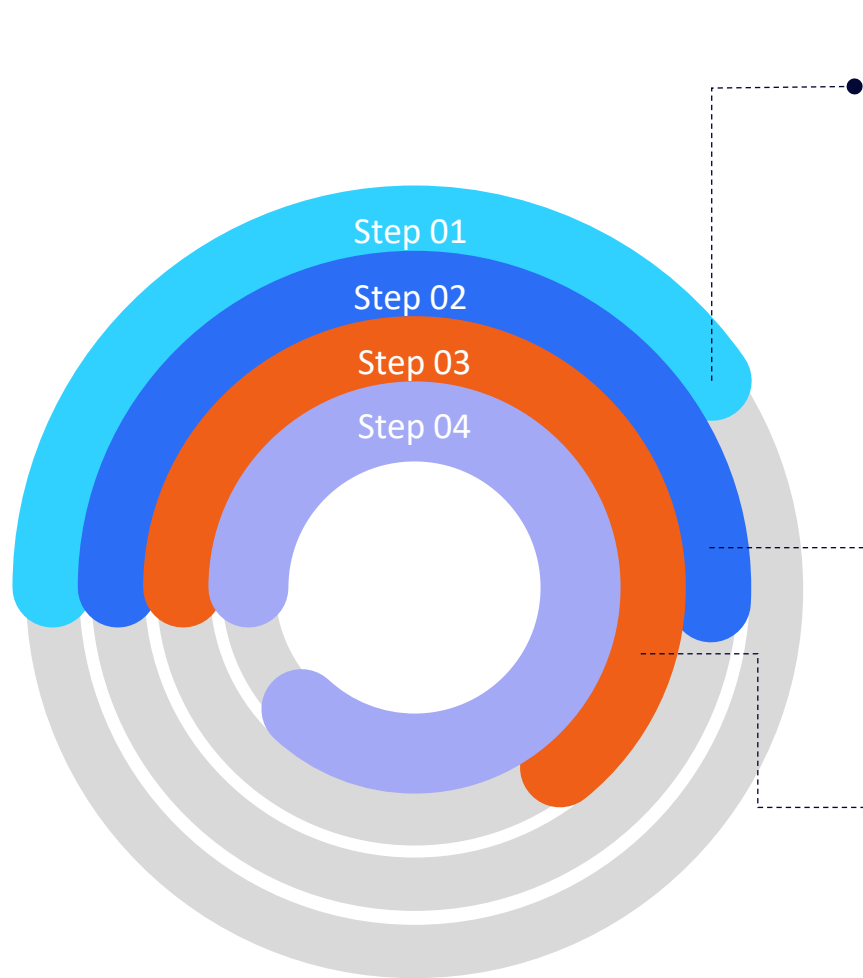
- + 4 Weekly Reporting
- + 8 Week Reporting Lag
- + Delivered in NIQ Discover Platform (Answers until H2 '25)
- + PPT & Excel Reporting Included
- + Spirits Database (Nov '25)



## Delivery: Alongside RMS

*\*Sample Pending*

# The OPM Methodology



## Building Outlet Sample

OPM sample is constructed and maintained every 4 weeks via our proprietary outlet database. Sample is created to be representative of the full universe based on:

- + Geographical Location
- + Class of Trade
- + Outlet Style



## Collect and prepare the data

- + Secure high-quality data for all sample points
- + Through digital data acquisition, 1000s of menus are scraped to give a complete picture of pricing and distribution
- + Commit to telephone audits where needed to supplement sample

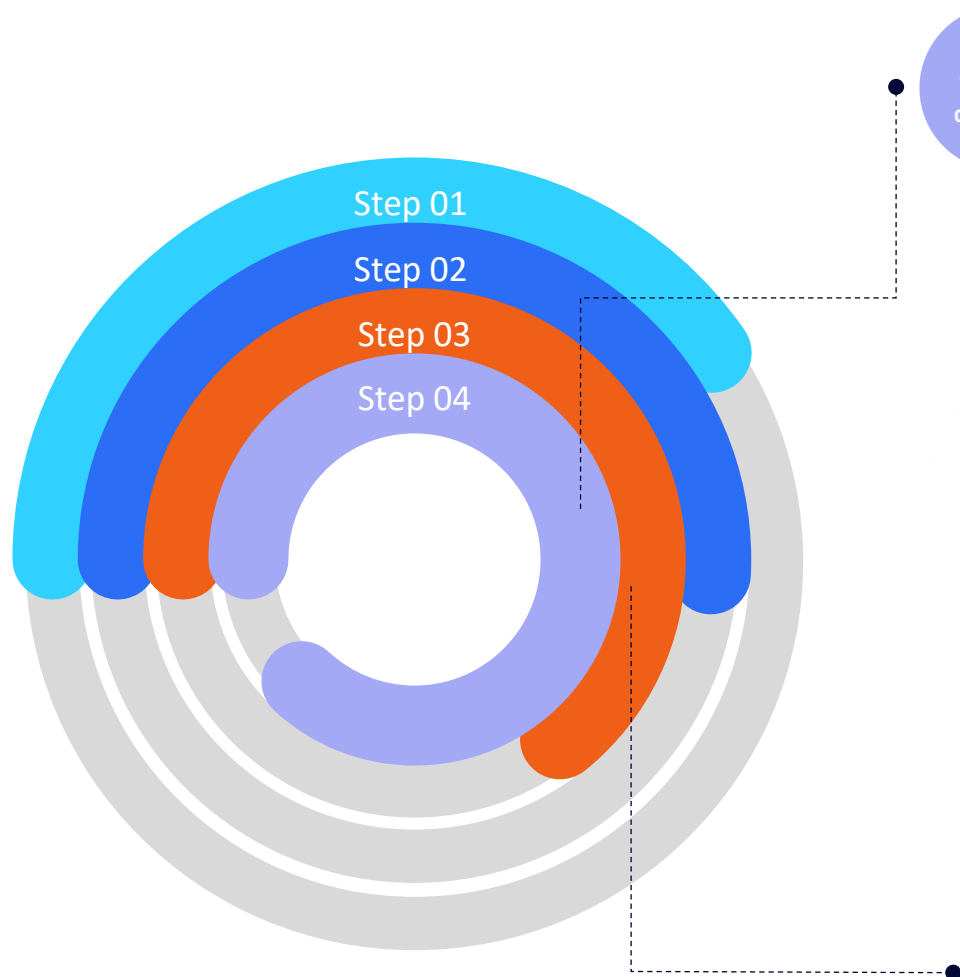


## Modelling

Utilising and combining multiple data sources to model brand and category performance within the market.

- + Products stocking and pricing information is applied to the sample to understand distribution footprint within the market
- + Once product stocking is established, RoS is applied to every outlet product combination based on volume performance within the volume pool.
- + Distribution and RoS is combined to create the volumetric read

# The OPM Methodology



## Best in class Validation

- + Model predictions are inspected by a technical team with strong market knowledge.
- + Volumes in OPM are cross referenced vs depletions from suppliers and model drift and over/under predictions are identified.
- + A feedback loop allows continued enhancements to the predictions, helping to reduce sample bias and ensure consistency of model performance over time.
- + Validation team will consistently recalibrate the model to account for any changes such as new data feeds, and will proactively investigate and perform deep dives into the OPM data to understand and correct any unexpected results.
- + Quality Control checks in place at each modelling stage including: automated exception testing vs client depletions to ensure outputs meet expectations and remain within agreed tolerances.

## Outputs are triangulated to provide actionable insight for business growth

- + OPM will allow you to examine areas such as Competitor analysis, Fair share and gap analysis and Category management





**OPM**  
(On Premise Measurement)

# *Output Examples*



**NIQ**

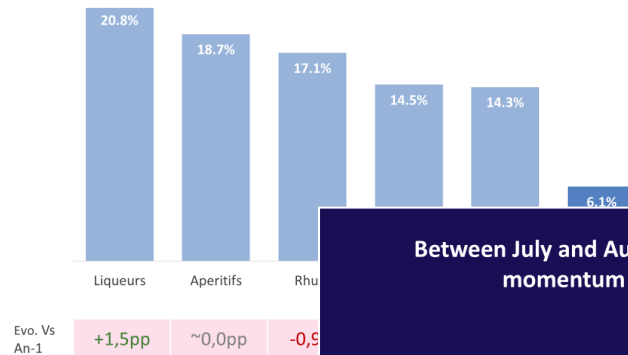




# Understand trends and seasonality

But all the same, the category is stagnating in terms of its share of the spirits generated revenue

PdM valeur (€) spiritueux HORECA | Total France | CAM P11 2023



Vodkas have overtaken whisk(e)ys, we note a general pull away from brown spirits towards white spirits and liqueurs

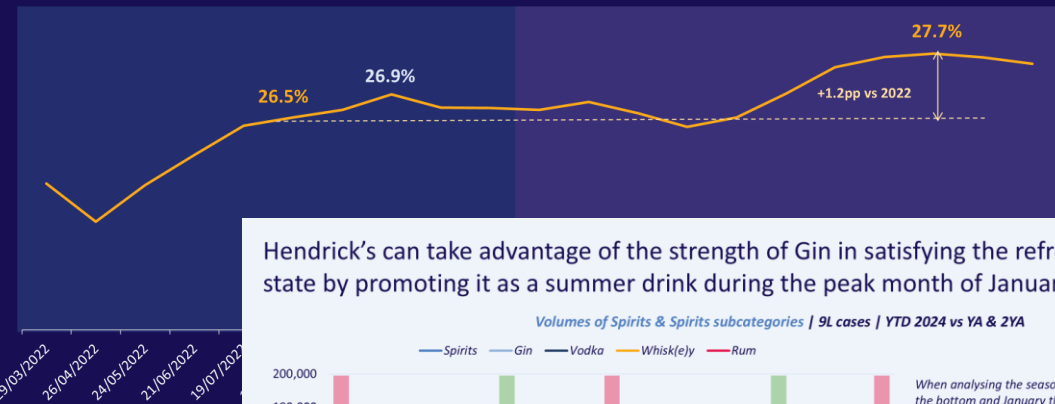
Evo. Vs An-1

Liqueurs	+1,5pp
Aperitifs	~0,0pp
Rhums	-0,9pp

CGA Powered by Nielsen Source: CGA Volume pool November

Between July and August, the Whisk(e)y category reached its peak MS in terms of Volume and the momentum is likely to continue into the end of the year due to the festive period

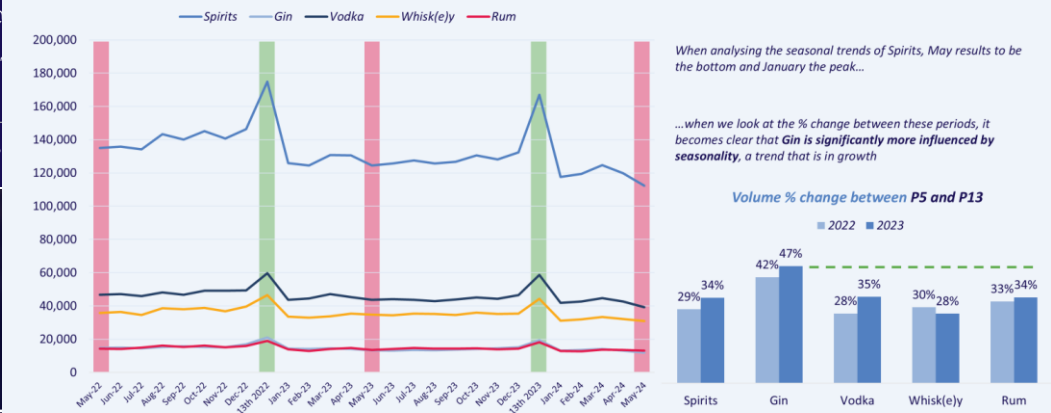
Volume Market Share of Whisk(e)y vs Total Spirits | Rolling 12 weeks



CGA Powered by Nielsen Source: CGA by NIQ OPM Australia, data to

Hendrick's can take advantage of the strength of Gin in satisfying the refreshment need state by promoting it as a summer drink during the peak month of January

Volumes of Spirits & Spirits subcategories | 9L cases | YTD 2024 vs YA & 2YA



When analysing the seasonal trends of Spirits, May results to be the bottom and January the peak...

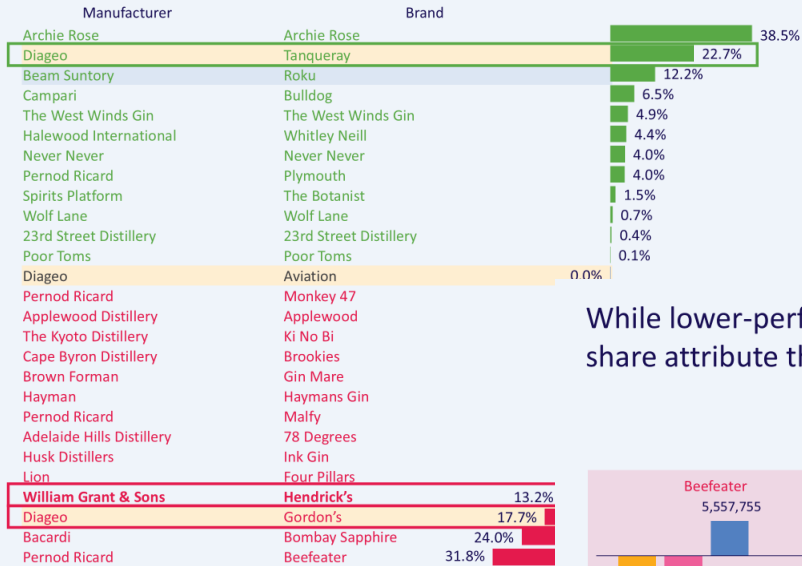
...when we look at the % change between these periods, it becomes clear that Gin is significantly more influenced by seasonality, a trend that is in growth

Volume % change between P5 and P13



CGA Powered by Nielsen Source: CGA by NIQ OPM Spirits Australia, data w/e 21/05/2024 vs YA

Contribution to the growth/loss of Gin volumes | MAT 2024 vs YA

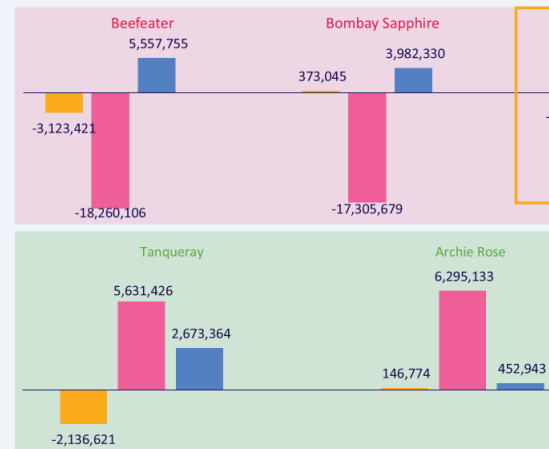


The success behind Diageo's Gin performance is Tanqueray, whilst Roku is the driver behind Beam Suntory's growth

While lower-performing competitors focus on pricing to gain value, those gaining market share attribute their growth primarily to an increase in RoS

Contribution to value change vs YA of competitor brands losing volumes & Hendrick's

Distribution contribution | Rate of sale contribution | Price contribution



Source: CGA by NIQ OPM Spirits Australia, data w/e 21/05/2024 vs YA

Grey Goose still holds the majority of the Premium Vodka market share, but Belvedere and Absolut Elyx experienced the largest losses in the panel this year, both down 10%.

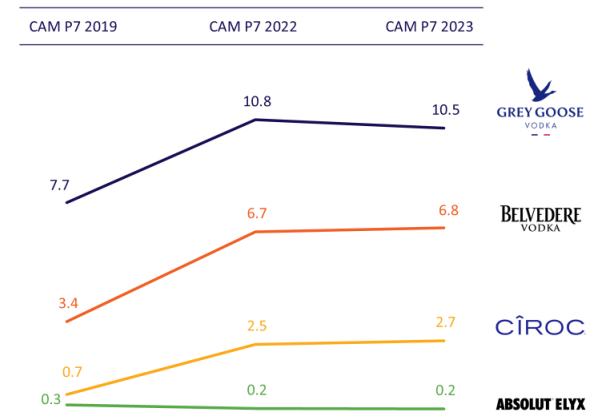
Market Share of Premium Vodka Brands | € | CAM juillet 2023

	Grey Goose	Belvedere	Ciroc	Absolut Elyx
PDM de Total Vodka	22,1%	14,3%	5,6%	0,3%
PDM de Vodka Premium	52,1%	33,9%	13,2%	0,8%
PDM vs 2019	-12,0pp	+6,1pp	+7,6pp	-1,7pp
PDM vs 2022	-1,4pp	+0,8pp	+0,7pp	-0,1pp
Evo Valeur vs 2019	+35,3%	+102,5%	+290,1%	-47,1%
Evo Valeur vs 2022	-2,8%	+2,1%	+5,3%	-6,5%

Source: Volume Pool France | juillet 2023

Track your competitors' performance and the reasons behind it (who, why, where?)

Revenue | Millions d'€ | CAM juillet 2023, 2022, 2019



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# Understand Channel dynamics

The reason behind this is likely due to its non-competitive pricing and not being able to rely on the "local product" factor

Volume MS vs Total Gin in each channel & price per 30 ml | Competitor set | MAT 2024 vs YA

Café Bar		Bar		Pub		Restaurant		Hotel		Club	
Tanqueray, 8.9%	\$13.02	Bombay Sapphire, 6.8%	\$12.63	Beefeater, 8.8%	\$10.35	Beefeater, 11.6%	\$10.89	Beefeater, 9.0%	\$10.94	Larios, 17.7%	\$11.54
Beefeater, 8.7%	\$12.38	Beefeater, 6.7%	\$11.80	Tanqueray, 8.1%	\$10.92	Tanqueray, 8.2%	\$11.00	Hendrick's, 7.9%	\$12.84	Tanqueray, 10.1%	\$11.54
Bombay Sapphire, 7.9%	\$12.61	Tanqueray, 6.1%	\$12.36	Bombay Sapphire, 7.4%	\$10.57	Hendrick's, 6.4%	\$12.71	Tanqueray, 7.2%	\$11.22	Beefeater, 9.5%	\$10.82
Four Pillars, 4.5%	\$14.72	Hendrick's, 5.0%	\$13.94	Hendrick's, 5.6%	\$12.59	Bombay Sapphire, 6.0%	\$10.76	Bombay Sapphire, 6.1%	\$10.89	Bombay Sapphire, 8.0%	\$11.25
Hendrick's, 4.4%	\$14.80	Four Pillars, 4.1%	\$14.03	Four Pillars, 4.2%	\$12.44	Malfy, 4.4%	\$11.54	Four Pillars, 3.7%	\$12.86	Hendrick's, 7.9%	\$13.09
		Archie Rose, 2.7%	\$13.96			Four Pillars, 4.1%	\$12.52	Archie Rose, 1.6%	\$12.74	Four Pillars, 2.7%	\$12.99
		Malfy, 2.3%	\$12.95			Archie Rose, 1.2%	\$12.37				

The only brands with a higher price are Archie Rose and Four Pillars, which however can rely on the "local product" factor

CGA Source: CGA by NIQ OPM Spirits Australia, data w/e 21/05/2024 vs YA

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## Ensuring strong distribution is maintained and launching a signature Spritz serve in Bar de Nuit should help drive MS growth through strategic targeting of the space occupied by Spritz drinkers and the younger demographic alike

Channels where Aperol holds a bigger Aperitif MS than Martini | Channels where Aperol holds a smaller Aperitif MS than Martini

CHANEL STRATEGY

	Bar de Jour	Bar de Nuit	Restaurant / Bar Restaurant	Discothèque	Hotel	Loisirs
MS vs Aperitifs	16.7%	29.6%	25.1%	28.6%	27.0%	26.0%
MS vs Aperol in Total France	5.3%	5.4%	78.4%	0.5%	8.8%	1.5%
MS chg vs YA (vs Aperitifs)	-1.9pp	0.0pp	+1.1pp	+1.8pp	+1.9pp	+1.9pp
MS chg vs 2YA (vs Aperitifs)	0.0pp	+0.7pp	+1.8pp	-3.0pp	+5.6pp	+1.4pp
% chg vs YA	-37.9%	+30.0%	+12.7%	+21.1%	+12.6%	+2.4%

MARTINI Volume of Martini by channel (L) | MAT 2023

	Bar de Jour	Bar de Nuit	Restaurant / Bar Restaurant	Discothèque	Hotel	Loisirs
MS vs Aperitifs	14.7%	12.5%	18.9%	16.8%	17.4%	17.8%
MS vs Martini in Total France	6.4%	3.1%	80.9%	0.4%	7.8%	1.4%
MS chg vs YA (vs Aperitifs)	-2.7pp	-1.2pp	-2.5pp	-1.6pp	-1.9pp	-2.8pp
MS chg vs 2YA (vs Aperitifs)	-3.5pp	-3.0pp	-3.0pp	-8.6pp	-4.0pp	-4.1pp
% chg vs YA	-41.6%	+18.9%	-4.8%	+3.8%	-5.6%	-18.3%

Currently Aperol surpasses its proportion of Volumes in Bar de Nuit, whilst Martini has an increased distribution in Bar de Jour: increasing the amount of Volumes distributed in this channel through good operator partnerships should be a priority.

Martini puts a higher proportion of its Volumes towards food-led channels and despite that, it has lost significant MS, meaning that the issue with the loss stands in the RoS and operators prioritising other brands rather than the distribution in venues.

After food-led venues, Hotels are the second biggest channel for Martini, since over 1 in 3 Martini Spritz Drinkers already visit the venue, expanding in this channel should therefore be facilitated

CGA Source: CGA by NIQ France Volume Pool December 2023  
Source: CGA by NIQ OPM France H2 2023, sample size: 59

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At the moment, the more competitive the channel, the least competitive Hendrick's becomes

Volumes | MAT 2024 vs YA



	GIN MS vs Total Spirits in channel	Hendrick's MS vs Gin in channel
Café Bar	14.4%	4.4%
Bar	11.7%	5.0%
Pub	11.2%	5.6%
Restaurant	11.0%	6.4%
Hotel	9.8%	7.9%
Club	4.6%	7.9%



CGA Source: CGA by NIQ OPM Spirits Australia, data w/e 21/05/2024 vs YA

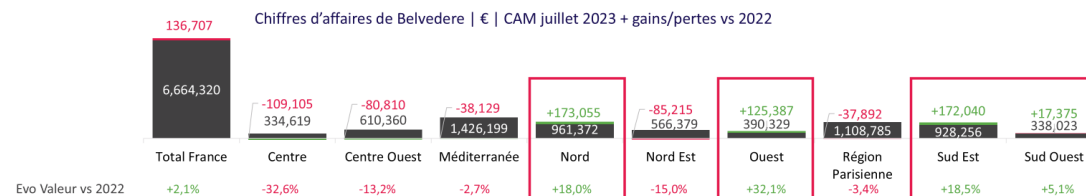
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Belvedere a connu des augmentations de prix beaucoup plus faibles, ce qui lui a permis de capitaliser sur les régions où Grey Goose perd le plus de revenus — c'est donc une substitution quasi-directe dans le panel

PDM de Belvedere vs Vodka Premium dans chaque région | CAM juillet 2023 | vs 2019 & 2022

	Total France	Centre	Centre Ouest	Méditerranée	Nord	Nord Est	Ouest	Région Parisienne	Sud Est	Sud Ouest
Total Vodka dans région	-	5,6%	8,6%	21,0%	10,1%	7,2%	6,7%	20,4%	12,5%	8,1%
PDM de Total Vodka	14,3%	8,5%	12,9%	14,0%	23,7%	14,2%	16,3%	11,1%	18,6%	9,2%
PDM de Vodka Premium	33,9%	19,9%	28,8%	28,1%	51,5%	27,9%	52,7%	32,6%	41,2%	27,1%
PDM vs 2019	+6,1pp	-1,4pp	-0,1pp	+5,3pp	+20,3pp	+0,8pp	+13,4pp	-5,5pp	+9,8pp	+15,4pp
PDM vs 2022	+0,8pp	-6,5pp	-4,2pp	-0,9pp	+8,6pp	-8,9pp	+8,4pp	-0,7pp	+6,2pp	+3,7pp
Evo de PPL vs 2022	+0,78€	+1,15€	+0,31€	-0,20€	+0,17€	+0,52€	+1,59€	+2,22€	+1,63€	-0,12€



CGA Source: Volume Pool France | juillet 2023

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La perte de PDM de Grey Goose peut principalement être attribuée à un faible RoS en particulier dans la Région Parisienne

Contribution aux chiffres d'affaires de Grey Goose par région | CAM juillet 2023 vs 2022

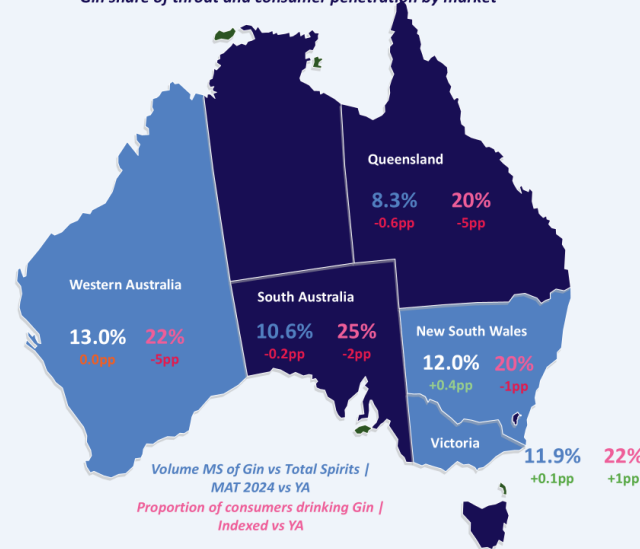
Région	Contribution DN	Contribution ROS	Contribution du prix	Chiffres d'affaires
Total France	+846,768	-1,688,862	+534,945	-307,148
Centre	0	-117,098	+25,407	-91,691
Centre Ouest	+62,322	-74,665	+23,799	+11,455
Méditerranée	+254,004	-206,252	+112,331	+160,084
Nord	+41,409	-119,353	-8,003	-85,947
Nord Est	0	+35,715	+53,076	+88,792
Ouest	+103,679	-253,950	+62,678	-87,592
Région Parisienne	+385,355	-482,265	+106,995	+10,085
Sud Est	0	-285,818	+102,357	-183,460
Sud Ouest	0	-185,176	+56,303	-128,873

CGA Clarification language: RoS = Rate of Sale = Taux de vente/Rotation Source: Volume Pool France | juillet 2023

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Understand regional nuances within your market

Gin share of throat and consumer penetration by market



The Gin category is improving its share in both NSW and VIC

CGA Source: CGA by NIQ OPUS Australia March 2023, March 2024, sample size: 68 – 1275, OPM Spirits Australia, data w/e 21/05/2024 vs YA \*data not available due to sample size limitations

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# Your preferred On Premise measurement partner

*CGA's OPM service is the only fully projected, extensively validated, measure of beverage alcohol performance in the Korean 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 the market.*

- **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's Sales Tracking Solutions

Full market measurement for manufactures, brands and categories in the On Premise  
All the way from total market to regional breakdowns



## PurchaseTrak

- + Comprehensive view of **how Beer, Wine and Spirits are being ordered and distributed across the market**
- + Compare rate of purchase with competitors by channel & region, alongside tactical analysis to develop distribution and in-outlet activation strategies
- Evaluate brand performance at City level to identify brand opportunities



## BeverageTrak

- + **Granular check-level sales data shows how brands & categories are being consumed, when and at what price**
- + **Day and daypart tracking** measures performance and activation ROI enabling sales and marketing teams to develop effective strategies
- + Quick turnaround produces **early indicator of key sub-channel trends**



## OPM

- + **Industry-leading Spirit and Beer volumetric (L) & sales (\$) measurement**
- + Barometer for brand and category performance & benchmarking and **tracking share**
- + Robust high-level data designed for central insights, brand and category teams, and C-suite



Take the guesswork out of  
your brand strategy

*Contact us today!*



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