

The background of the slide is a dark, textured surface, possibly slate or stone. In the upper right and lower center, there are two glasses filled with a light-colored liquid, likely lemonade. Each glass contains several ice cubes and a sprig of fresh rosemary. A few more ice cubes and a small sprig of rosemary are scattered on the surface around the glasses. The overall aesthetic is clean and modern.

CANADA ON PREMISE PULSE REPORT

Teaser

CGA by NIQ, April 2023





Methodology

CONSUMER RESEARCH

CGA by NIQ surveyed 1,200 LDA On Premise consumers across four key provinces (Alberta, British Columbia, Ontario and Quebec). Consumers had to have visited the On Premise in the past 3 months and be aged 19+.

An equal number of respondents were collected from each province with each nationally representative on gender and age.

Fieldwork was undertaken 2023/04/18 to 2023/04/21.



29%



of consumers have visited/plan to visit
the On Premise to watch the



Stanley Cup Playoffs









STANLEY CUP PLAYOFFS



Top drink categories

	Beer	62%
	Vodka	26%
	Whiskey	25%
	Table wine	20%
	Rum	19%
	Cocktails	17%
	Shots	17%

Venues planning to visit

		
Sports bars	Neighbourhood bars	Brew pub/ Tap rooms
54%	36%	25%
		
Casual dining chains	Independently owned restaurants	Hotel bar/ restaurants
23%	22%	20%



TO WHAT EXTENT ARE YOU LIKELY TO/UNLIKELY TO...?



Asked to those who have/are planning to watch the Stanley Cup Playoffs

90%

of consumers are
extremely likely/likely to

**take part in a promotion directly
related to the Stanley Cup Playoffs at
a bar, restaurant or similar venue
where you are watching a game**



82%

of consumers are
extremely likely/likely to

**have a drink that is affiliated with the
NHL or one of its teams while watching
the Stanley Cup Playoffs in bars,
restaurants and similar venues**





DAILY FANTASY SPORTS BETTING DURING THE STANLEY CUP PLAYOFFS



Asked to Ontario residents who have/are planning to watch the Stanley Cup Playoffs

55%

of consumers have/are planning
to participate in daily fantasy sports betting or sports betting via mobile
app while out in bars, restaurants or similar venues
during the Stanley Cup Playoffs

71%

If I win a bet, I would be more likely to stay at the venue longer for another drink

67%

I would likely order more drinks if I were watching a game that I placed a bet on, as opposed to a game I did not bet on

58%

Mobile sports betting would keep me at a venue longer as I would stay to watch the full event

58%

Watching sports that I bet on would influence my drink choice when out

ON PREMISE SALES

IMPACT REPORT

CGA by NIQ, May 4 2023

<https://cgastrategy.com/covid-19-on-premise-impact-us/>





INTRODUCTION

CGA by NIQ provides definitive On Premise consumer intelligence that reveals new pathways to growth for the world's most successful food and drink brands. With more than 30 years of best-in-class research, data, and analytics, CGA by NIQ provides the Full View(TM).

CGA by NIQ works with food and beverage suppliers, consumer brand owners, wholesalers, government entities, pubs, bars, and restaurants to protect and shape the future of the On Premise experience. Using the most complete and clear understanding of measurement and insights, CGA by NIQ provides a competitive edge to guide winning strategies for On Premise businesses.

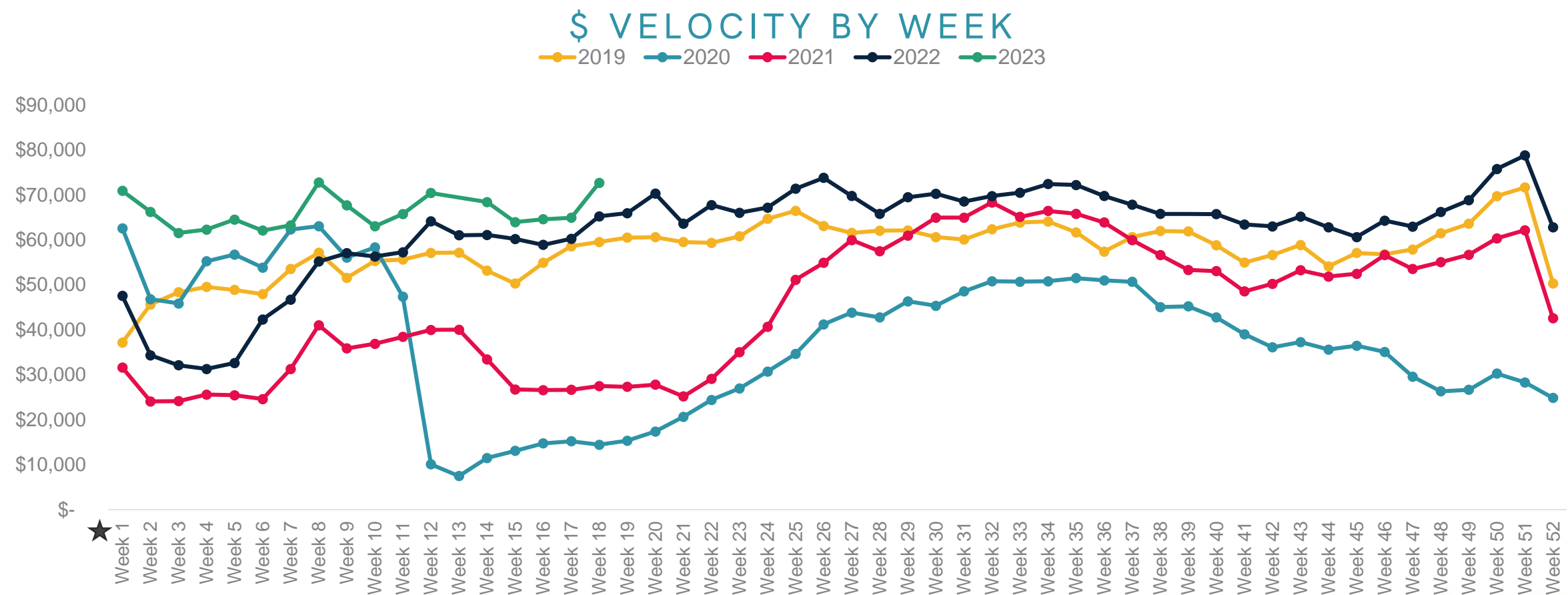
NIQ was founded in 1923 and is an Advent International portfolio company. For more information, visit [NIQ.com](https://www.niq.com) or www.cgastrategy.com.

This report will cover On Premise sales trends from our BeverageTrak dataset up to week ending April 29 2023.



TOTAL CANADA MARKET SALES: RECAP

Velocity continues to exceed last year (+11%)

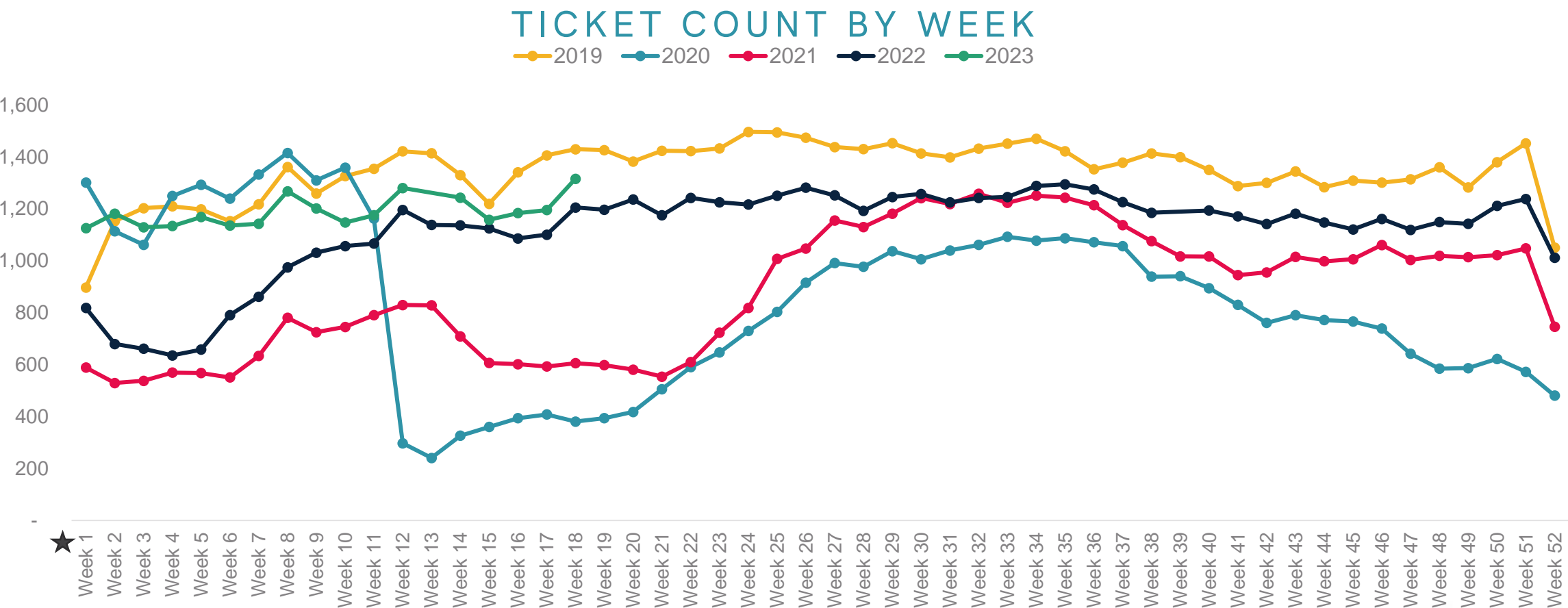


★ Exact dates can be found in the appendix

• N.B. Incomplete data for week 39 in 2022 & week 13 in 2023

TOTAL CANADA MARKET SALES: RECAP

Whilst ticket count is slightly below pre-covid levels, it remains ahead of 2022



★ Exact dates can be found in the appendix

• N.B. Incomplete data for week 39 in 2022 & week 13 in 2023



CGA - ON PREMISE INSIGHTS

Robust, tried and trusted leading solutions supporting the BevAL industry globally - now being made available in Canada

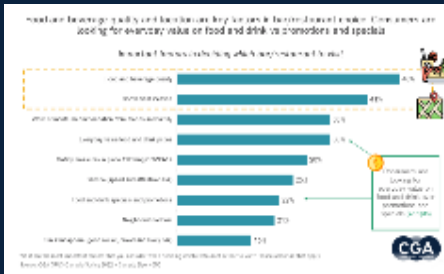
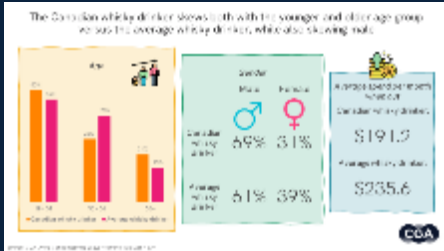
Consumer Solutions

7,500 nationally representative sample of consumers and their behaviors in bars and restaurants produced twice a year (Spring & Fall)

- Build brand programming
- Support retailer conversations
- Regional consumer profiling
- Channel segmentation analysis
- Build marketing & promotional material

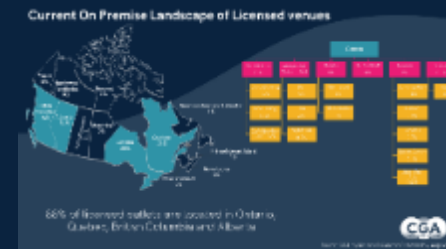
Beer, wine, spirits, and soft drinks included

Custom consumer research capabilities



Outlet Segmentation & Classification

Full outlet database of licensed alcohol venues across Canada. Updated quarterly to track channel opens and closures.



- Develop distribution profiling
- Efficiently target distribution opportunities
- Identify true size of the On Premise
- Penetration & gap analysis
- Province specific reporting

Ability to match to internal segmentation and deliver directly into CRM systems

Answers questions such as:

What is driving purchase intentions for consumers in bars and restaurants?

How are consumers engaging with my brands/categories?

What is the size and scale of the On Premise channel in Canada?

Which areas of the Canada On Premise is my coverage best, and where we can we increase our distribution?

CGA by NielsenIQ Impact Reports

CGA's On Premise Impact 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.

We began delivering these reports during the emergence of COVID-19 and now are providing this service year round.

3 PPT reports sent per month - with unlimited member access included in subscription

- + 2 Sales Impact Reports: Provides sales velocity and ticket count trends drilling into specific Provinces to measure bar and restaurant sales performance.



- + 1 Consumer Impact Report: gauging perception of On Premise visitors nationally on trends that are taking place in the channel. Subjected topics change with each month for fresh, relevant content.



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



CGA BY NIQ CONSUMER TOOLS

Additional Consumer Reporting where CGA by NIQ's expertise can be leveraged



Custom RFP Support Decks

Take chain-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

Contact Us

To learn more or to speak to a member of the team, please feel free to get in touch:

Mitch Stefani Client Solutions Director – Americas
mitch.stefani@cgsstrategy.com

Matt Crompton Regional Director – North America
matthew.crompton@cgastrategy.com

Francis Parisien SVP Sales SMB – Canada
francis.parisien@nielseniq.com