ON PREMISE SALES

IMPACT REPORT

CGA, August 5 2022

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

INTRODUCTION

CGA’s dedicated focus is to measure, understand and consult on the On Premise channel in many countries around the world.

In these times of unprecedented change in both consumer needs, and in the very infrastructure of the channel, robust data-driven insights and consultation has never been more important.

Since COVID-19 hit us all in March 2020, we have been committed to providing bi-monthly, free for all, custom research designed specifically to add value to the topic areas that you, our valued customers, have told us is important to you.

We shall continue to do this until you tell us that the channel has become predictable enough to no longer need such frequent touch points around changing consumer sentiment and sales tracking.

In this BeverageTrak update, we are evaluating the most recent $ sales velocity performance. Given the US is such a vast and diverse country, understanding the different sales dynamics across the different States, as the consumer and regulatory response to COVID-19 evolves, is proving to be extremely important in building local sales tactics.

This report covers On Premise $ sales trends from our unique BeverageTrak dataset up to week ending July 23, 2022.

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CORE CGA ON PREMISE SOLUTIONS

Essential Services to support your 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*

BeverageTrak

On Premise Sales Data

+ 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 subchannel trends

OPM

Sales Performance

+ Industry leading Spirit, Beer, and Wine volumetric (L) & sales ($) measurement

+ Barometer for brand and category performance & benchmarking

+ Robust high-level data designed for central insights, brand and category teams, and c-suite

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CGA On Premise Cocktail Report will help you unlock the insights needed to build out effective cocktail programming in time for Summer planning

CGA On Premise Cocktail Report

A comprehensive report unlocking the foundational insights needed to build a data led, effective cocktail programming for the On Premise

Answers key questions such as:
What are the biggest cocktail opportunities for my brand/category?
When and where should I focus activations and promotions for cocktails which include my brand/category? [day part, day and outlet type]
What are effective price points for the cocktails my brand should be included in to ensure sales and profits are maximized?

PowerPoint & Excel Report

Quarterly Cocktail Sales Tracker

A tracking report designed for understanding cocktail sales dynamics, velocities and pricing over the latest 12 weeks to maintain a winning cocktail strategy

Data covers: Total US, Key States (Illinois, New York, Texas, Florida and California), Channel, Day and Daypart

Quarterly report delivered in Excel

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CHANNEL STRATEGY STUDY 2022

Launching Q3 2022

Providing the insights and clarity for suppliers on where the opportunity for their brand/category is and how they need to tailor tactics to win in this space.

KEY MILESTONES:
Detailed intro and early commitment opportunity – Jun 2022
Fieldwork – July 2022
Reports Available – From Aug 2022

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KEY INSIGHTS

- Following trends of +6% to July 16, the latest week has been slightly positive (+1%), with all key states aside from Florida flat or positive.
    - The week to July 23 saw ticket count remain flat, with check value up +1% vs the previous week.
    - Trends in the previous week were driven largely by an increase in traffic (+5%), with check value also slightly positive (+1%).
    - With many people returning from visiting home **Chicago** and **New York City** vs the rest of the state, experienced the strongest uplift in the latest week, with the cities up +32% and +29% respectively July 16 v July 9.
- These trends continue to follow a similar seasonal pattern to last year, resulting in Total US remaining slightly positive (+1%) vs 2021.
    - Check value continues to outperform 2021 (+7%), with traffic down -6%.
    - New York (+4%), Illinois (+4%) and California (+2%) continue to outperform 2021 velocity, whilst Texas (-6%) and Florida (-8%) remain slightly behind.
- After a largely positive week to July 16 the most recent week saw mixed trends, with variability by day and by state resulting in it being largely flat vs the previous week.

SOURCE: BEVERAGETRAK

TRENDS OVER TIME

Latest week:

July 23 2022	v 2021
$78,853	+1%

Latest 12 weeks:

July 23 2022	v 2021
$924,949	+24%

SOURCE: BEVERAGETRAK

LATEST WEEK TRENDS

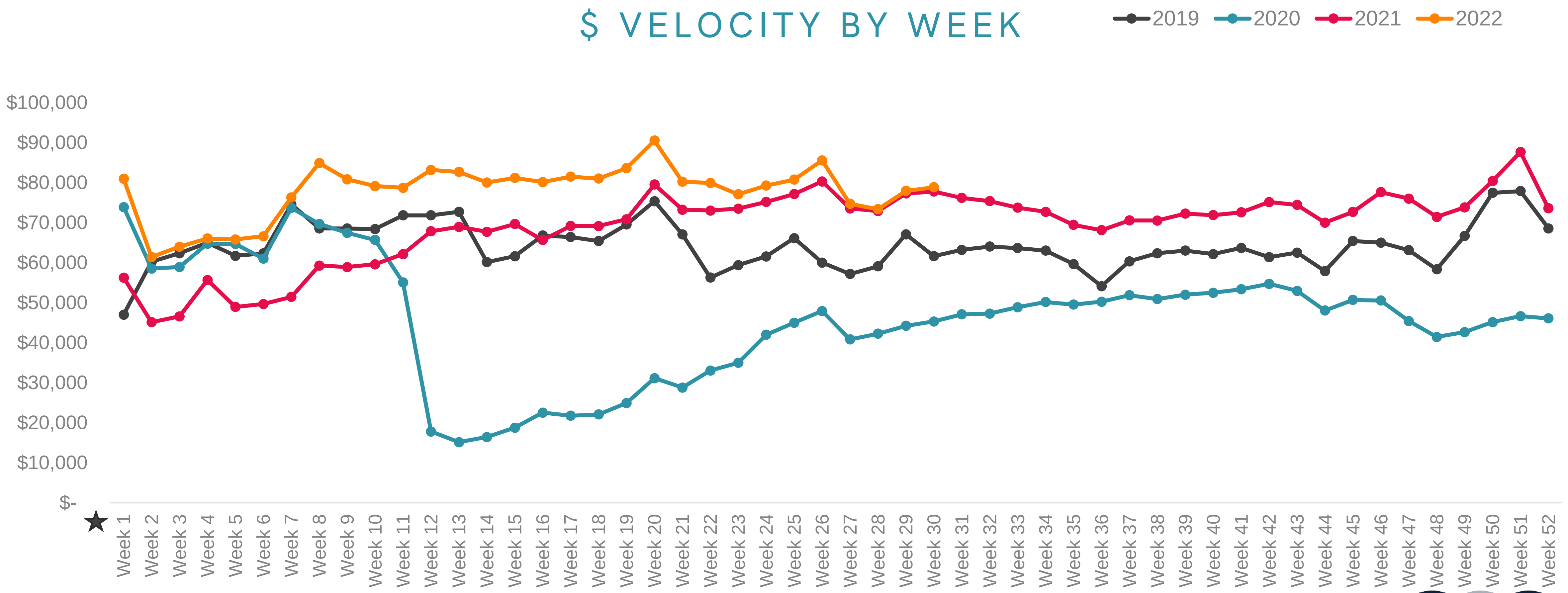
Value Velocity:	Check Value:	Ticket Count:
$78,853	$49.56	1,591
+1%	+7%	-6%

Vs July 24 2021

SOURCE: BEVERAGETRAK

TOTAL US MARKET SALES: RECAP

With similar trends over recent weeks, Total US velocity remains slightly ahead of last year (+1%)

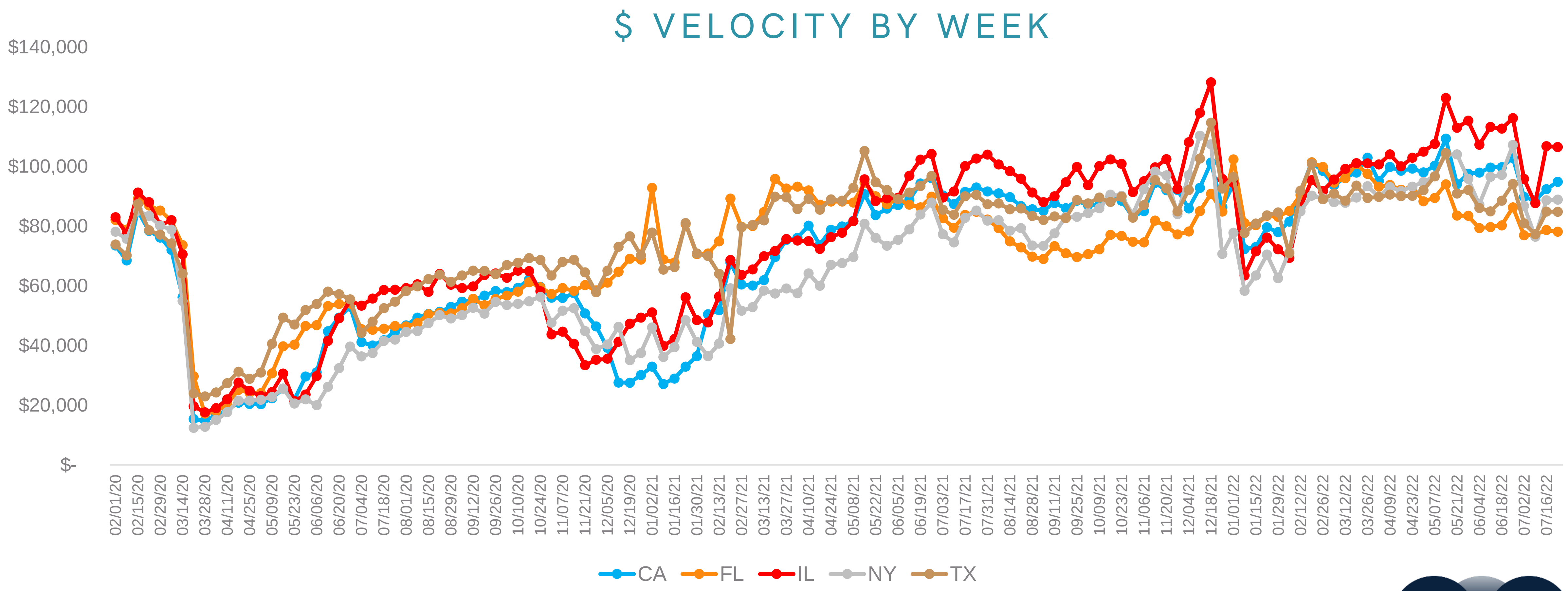


★ Exact dates can be found in the appendix

SOURCE: BEVERAGETRAK

KEY STATE MARKET SALES: RECAP

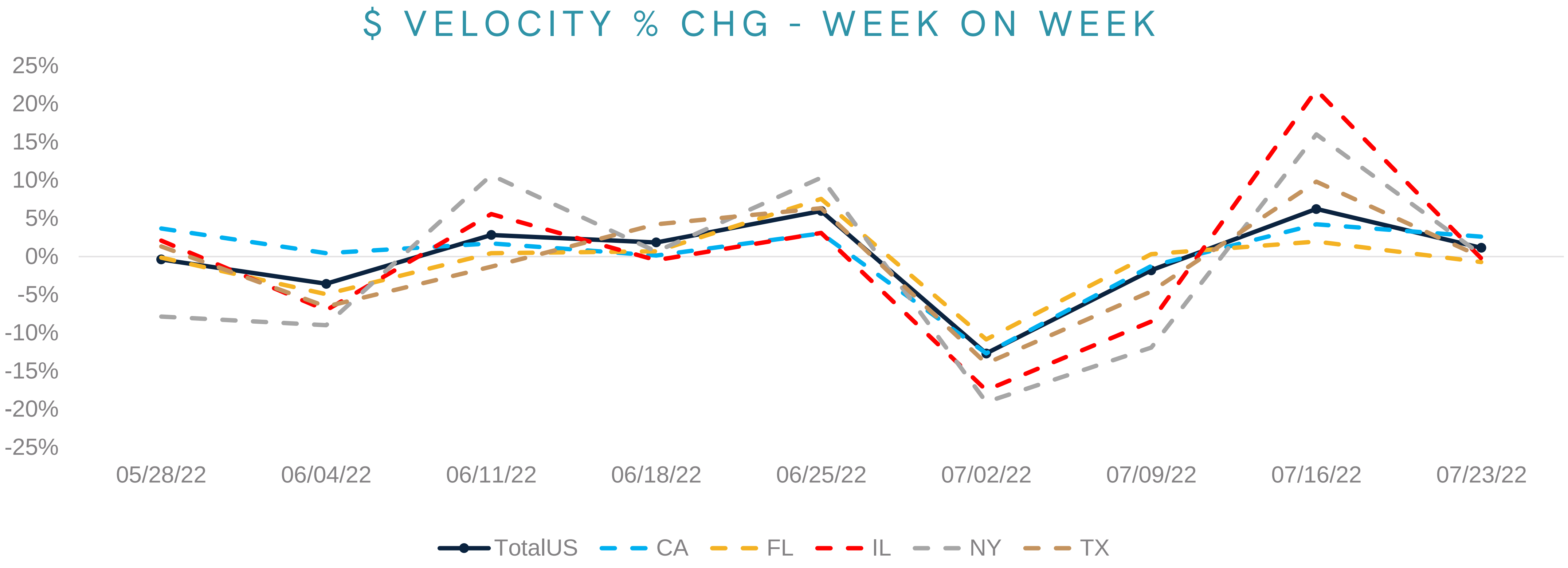
All key states aside from Florida & Texas are positive vs last year



SOURCE: BEVERAGETRAK

TOTAL MARKET SALES

The latest week saw largely flat trends, with California the best performing of the key states



SOURCE: BEVERAGETRAK

NEW YORK STATE

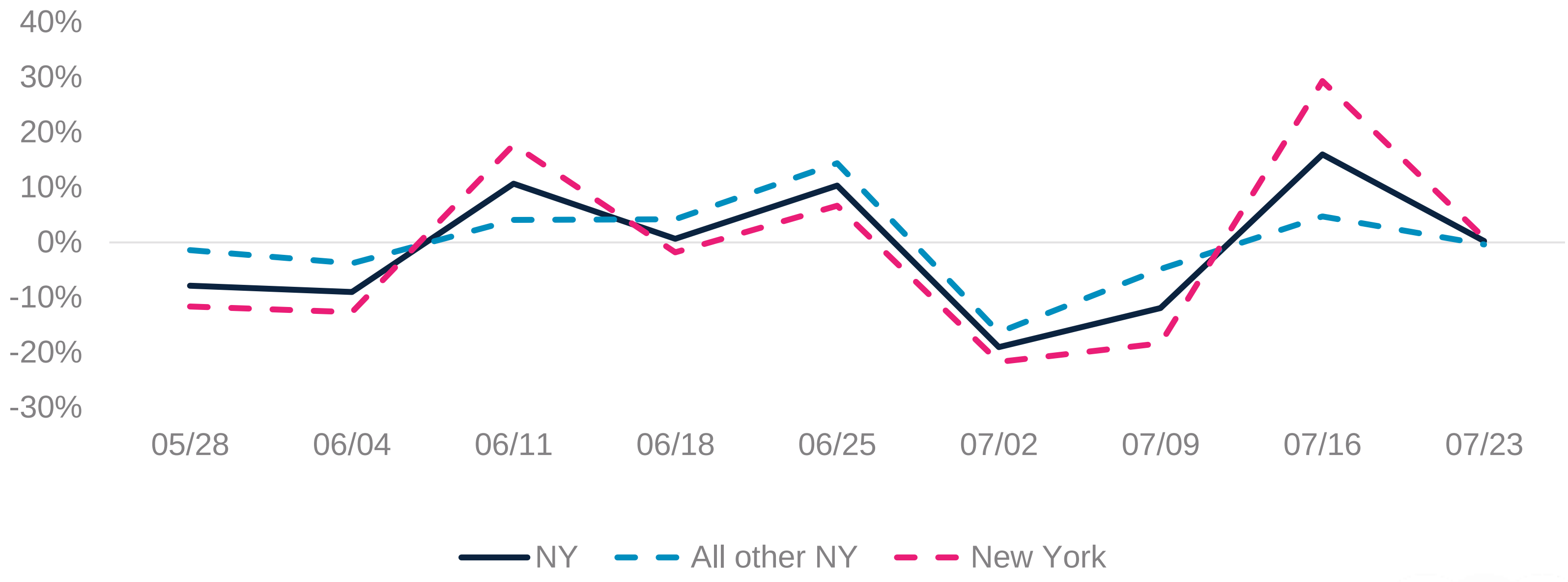
+4%

v July 24 2021

+0%

v July 16 2022

$ VELOCITY % CHG - WEEK ON WEEK



SOURCE: BEVERAGETRAK

ILLINOIS

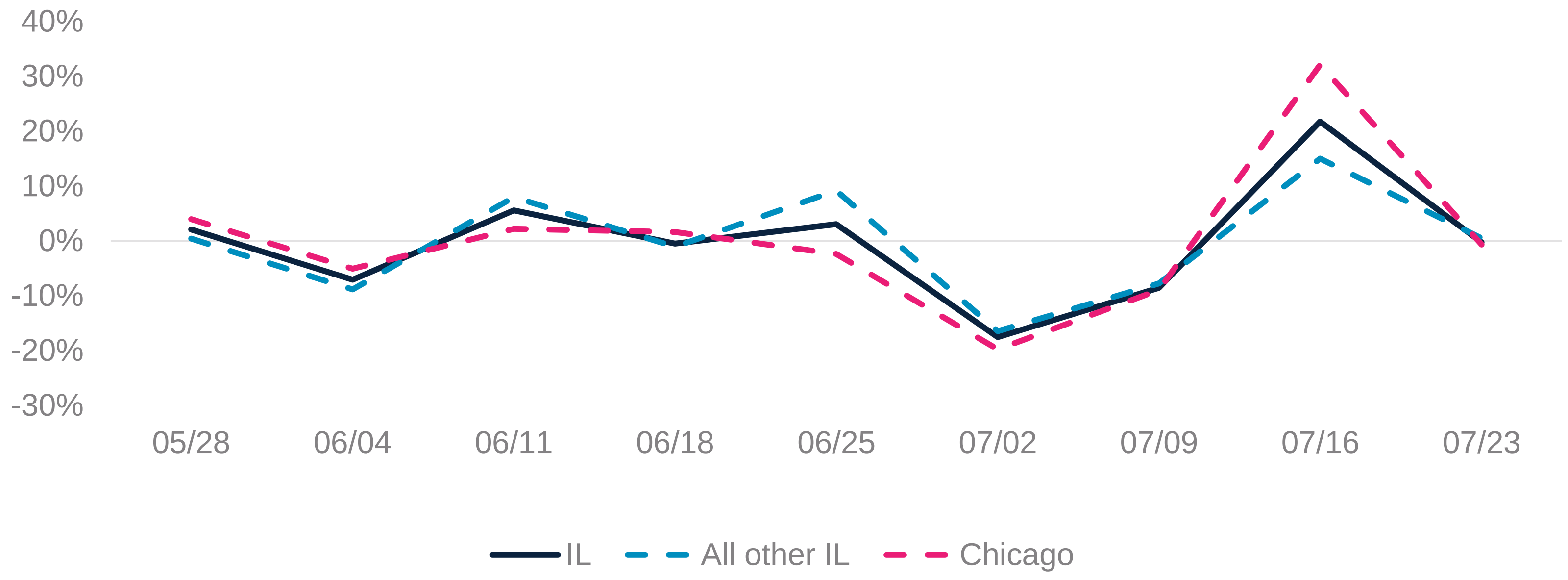
+4%

v July 24 2021

+0%

v July 16 2022

$ VELOCITY % CHG - WEEK ON WEEK



SOURCE: BEVERAGETRAK

CALIFORNIA

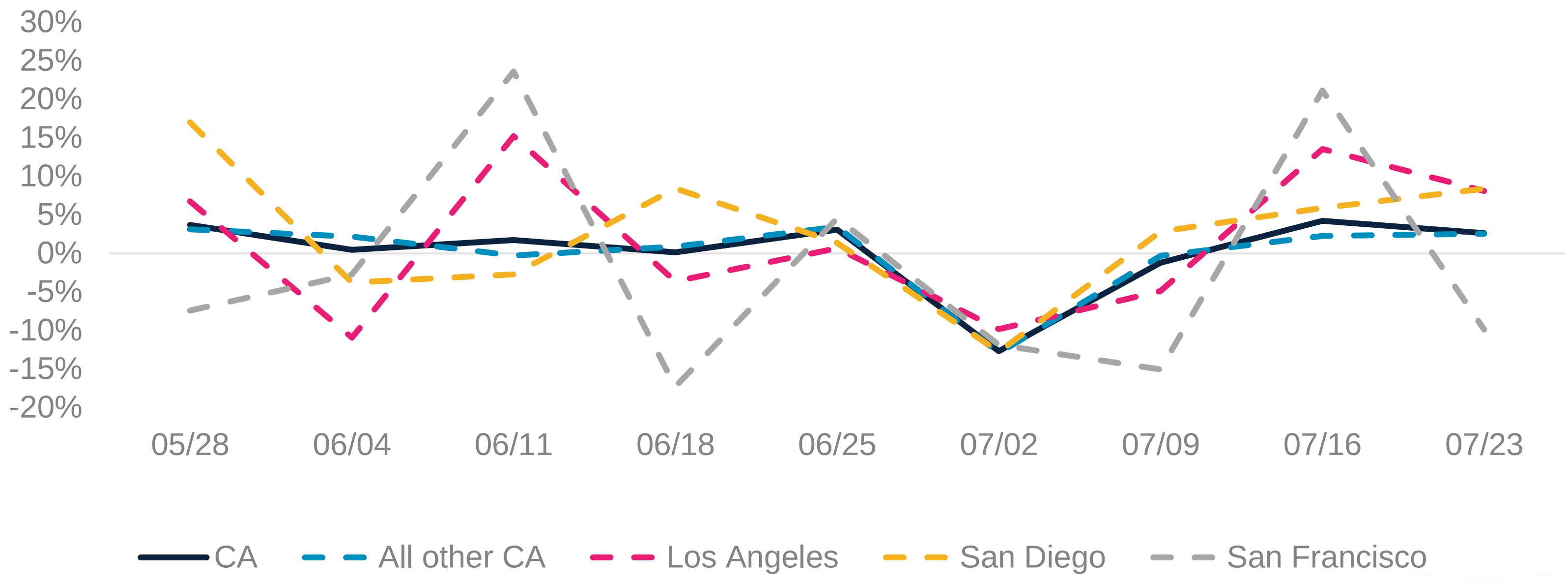
+2%

v July 24 2021

+3%

v July 16 2022

$ VELOCITY % CHG - WEEK ON WEEK



SOURCE: BEVERAGETRAK

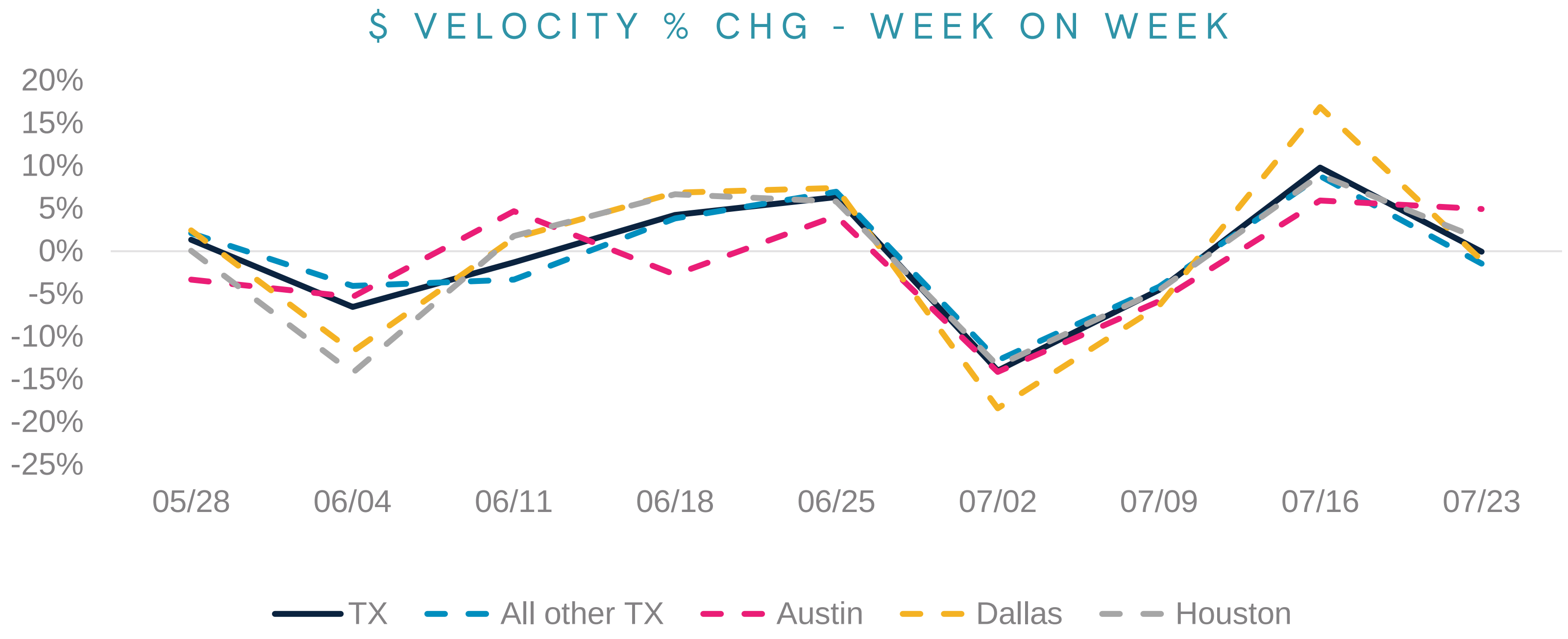
TEXAS

-6%

v July 24 2021

+0%

v July 16 2022



SOURCE: BEVERAGETRAK

FLORIDA

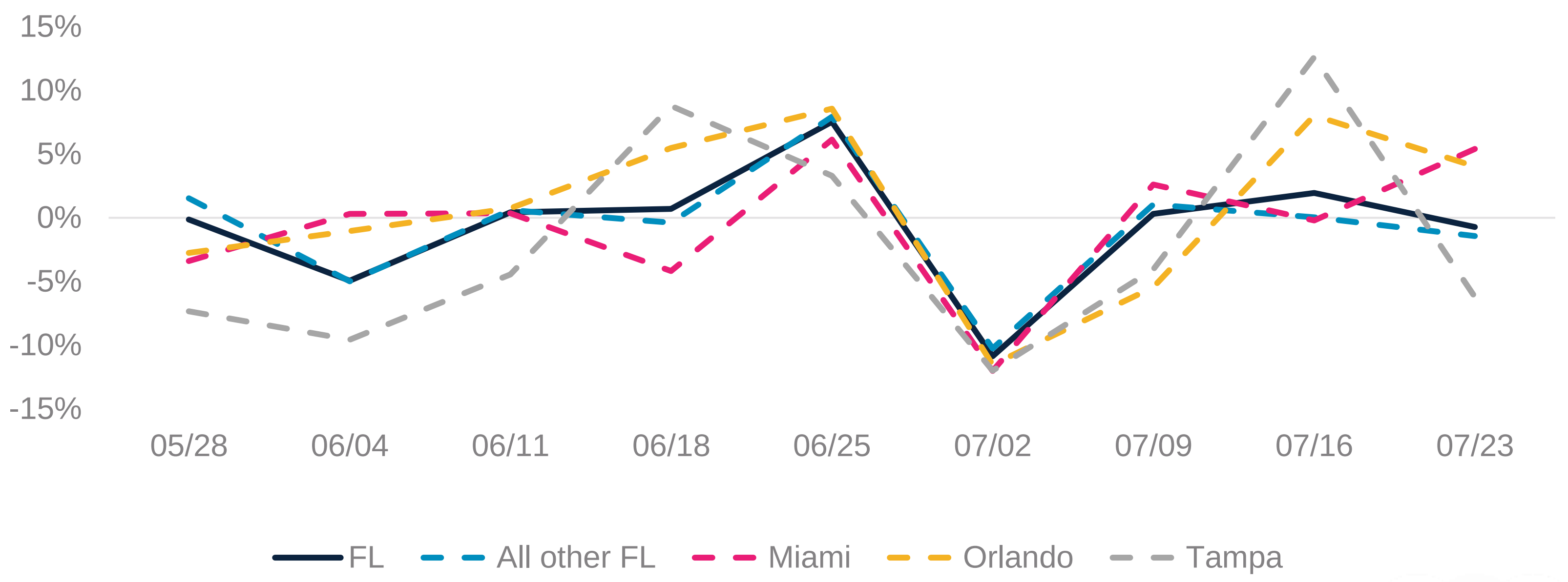
-8%

v July 24 2021

-1%

v July 16 2022

$ VELOCITY % CHG - WEEK ON WEEK



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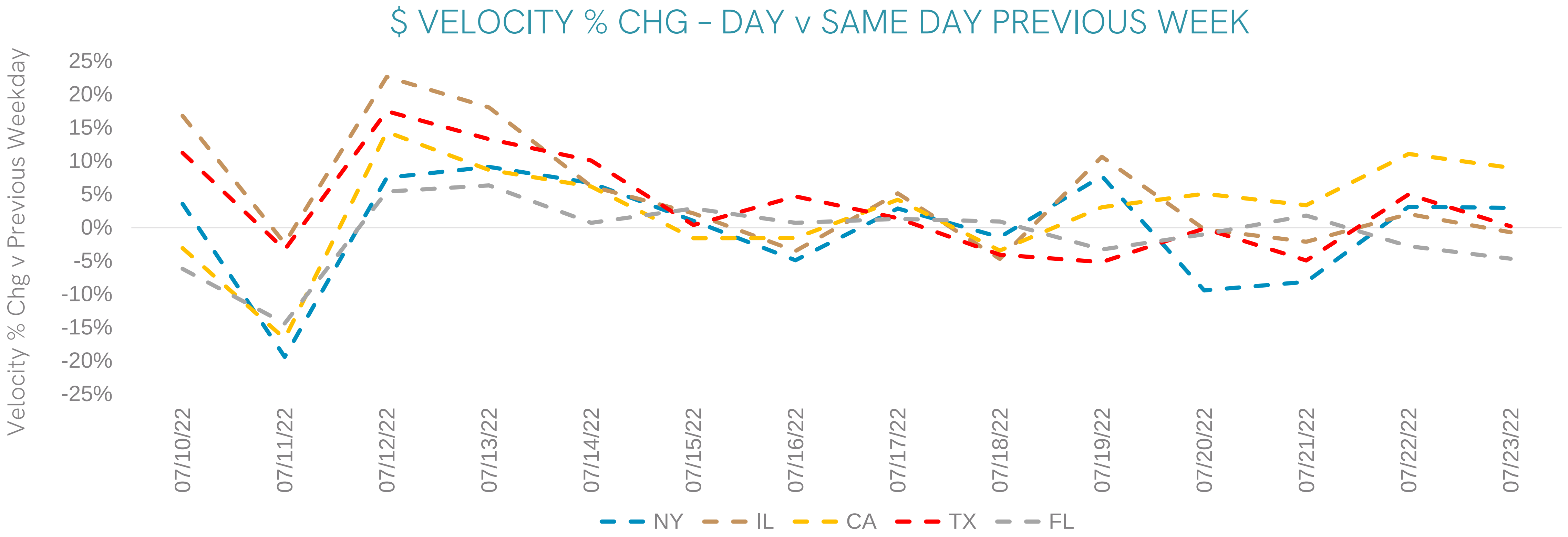
SOURCE: BEVERAGETRAK

DAILY VELOCITY

After a largely positive week to July 16 the most recent week saw mixed trends, with variability by day and by state resulting in it being largely flat vs the previous week.



N.B.

% Chg v Previous Same Weekday: Change in Velocity v the same weekday in the previous week. E.g. Monday this week v Monday last week

SOURCE: BEVERAGETRAK

METHODOLOGY

BEVERAGETRAK

POWERED BY CHECK-LEVEL INSIGHTS POOL (CLIP)

Analysis of BeverageTrak demonstrates that current On-Premise performance is two Standard Errors away from normal market variation. We can therefore infer that as one of the main variables that cannot be controlled for is COVID-19, and it is this that is driving market performance.

A stable set of outlets has been used to allow a comparison of average value velocity this year against last year. The comparison points used will be the same week as a week a year ago for example average sales from week 30 in 2022 will be compared to average sales from week 30 2021.

HOW CAN WE HELP?

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WEEK ENDINGS

	2019	2020	2021	2022
Week 1	1/5	1/4	1/2	1/1
Week 2	1/12	1/11	1/9	1/8
Week 3	1/19	1/18	1/16	1/15
Week 4	1/26	1/25	1/23	1/22
Week 5	2/2	2/1	1/30	1/29
Week 6	2/9	2/8	2/6	2/5
Week 7	2/16	2/15	2/13	2/12
Week 8	2/23	2/22	2/20	2/19
Week 9	3/2	2/29	2/27	2/26
Week 10	3/9	3/7	3/6	3/5
Week 11	3/16	3/14	3/13	3/12
Week 12	3/23	3/21	3/20	3/19
Week 13	3/30	3/28	3/27	3/26
Week 14	4/6	4/4	4/3	4/2
Week 15	4/13	4/11	4/10	4/9
Week 16	4/20	4/18	4/17	4/16
Week 17	4/27	4/25	4/24	4/23
Week 18	5/4	5/2	5/1	4/30
Week 19	5/11	5/9	5/8	5/7
Week 20	5/18	5/16	5/15	5/14
Week 21	5/25	5/23	5/22	5/21
Week 22	6/1	5/30	5/29	5/28
Week 23	6/8	6/6	6/5	6/4
Week 24	6/15	6/13	6/12	6/11
Week 25	6/22	6/20	6/19	6/18
Week 26	6/29	6/27	6/26	6/25

	2019	2020	2021	2022
Week 27	7/6	7/4	7/3	7/2
Week 28	7/13	7/11	7/10	7/9
Week 29	7/20	7/18	7/17	7/16
Week 30	7/27	7/25	7/24	7/23
Week 31	8/3	8/1	7/31	
Week 32	8/10	8/8	8/7	
Week 33	8/17	8/15	8/14	
Week 34	8/24	8/22	8/21	
Week 35	8/31	8/29	8/28	
Week 36	9/7	9/5	9/4	
Week 37	9/14	9/12	9/11	
Week 38	9/21	9/19	9/18	
Week 39	9/28	9/26	9/25	
Week 40	10/5	10/3	10/02	
Week 41	10/12	10/10	10/09	
Week 42	10/19	10/17	10/16	
Week 43	10/26	10/24	10/23	
Week 44	11/2	10/31	10/30	
Week 45	11/9	11/7	11/6	
Week 46	11/16	11/14	11/13	
Week 47	11/23	11/21	11/20	
Week 48	11/30	11/28	11/27	
Week 49	12/7	12/5	12/4	
Week 50	12/14	12/12	12/11	
Week 51	12/21	12/19	12/18	
Week 52	12/28	12/26	12/25	

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