



OPUS: On-Premise User Survey

CUSTOM CONSUMER RESEARCH FOR THE CANADIAN ON PREMISE CHANNEL



PHENOMENAL DATA. EXPERT INSIGHT.



TAKING OUR INSIGHTS NORTH OF THE BORDER



After launching a suite of US-focused On Premise tools in 2016, we are now expanding services into **Canada** as we continue to secure our position as world leading On Premise consultants.

In April 2020, we launch our first **On Premise User Survey** (OPUS) in Canada – a service which has gained exceptional support among leading drinks suppliers in the US.

Over the last 4 years OPUS, and its sub-product KAST (the Key Account Selling Tool), has proven to offer unique and essential insights for category, brand, and National / Key Account sales teams focused on growth in the On Premise.

Our 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.

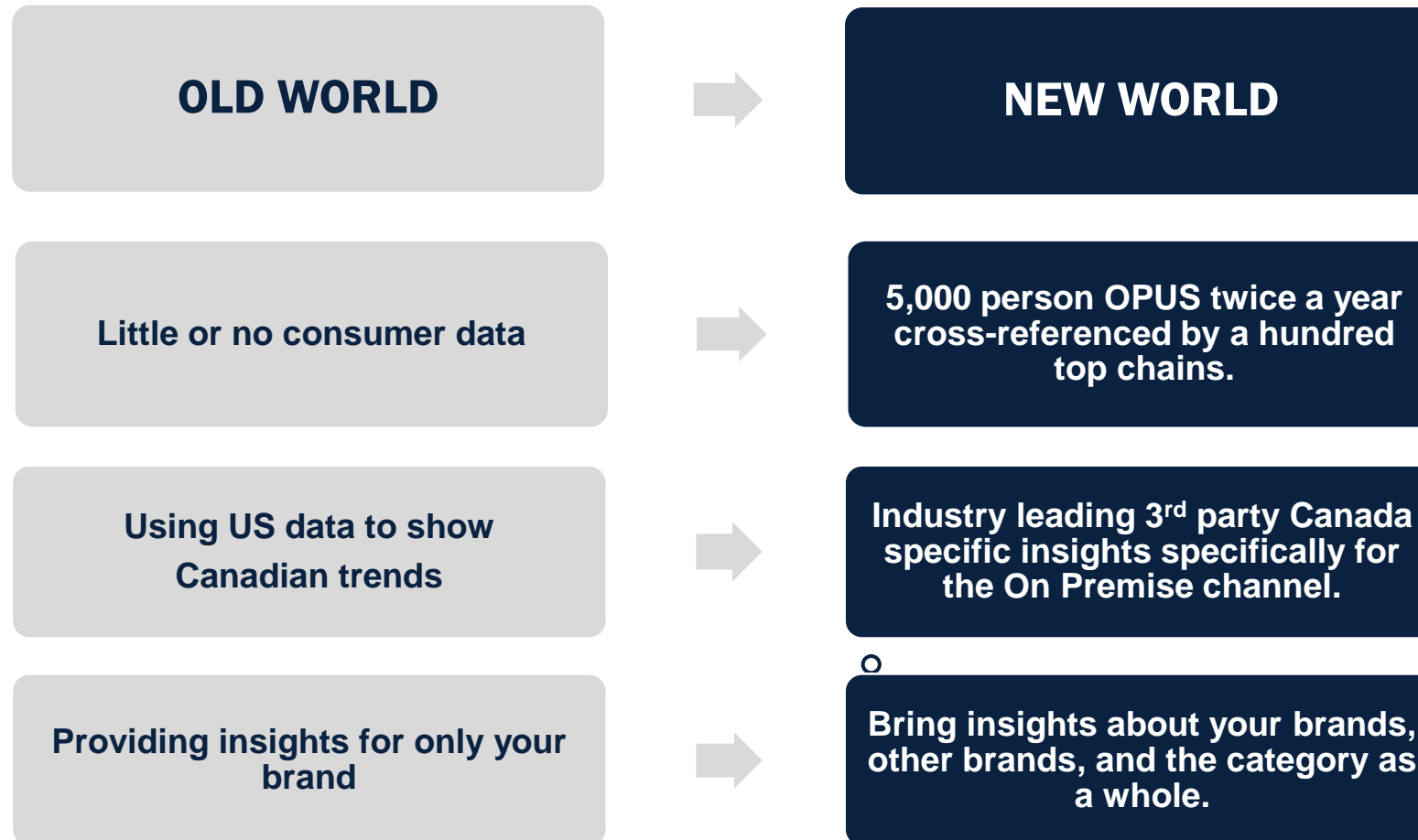
In Canada, our Consumer Research solutions are only the beginning with a host of valuable tools following soon which are designed to enable better sales planning, more effective activations and unparalleled, local, fact-based selling solutions.



PHENOMENAL DATA. EXPERT INSIGHT.



INTRODUCING A *NEW WORLD* OF ON-PREMISE DATA & ANALYTICS

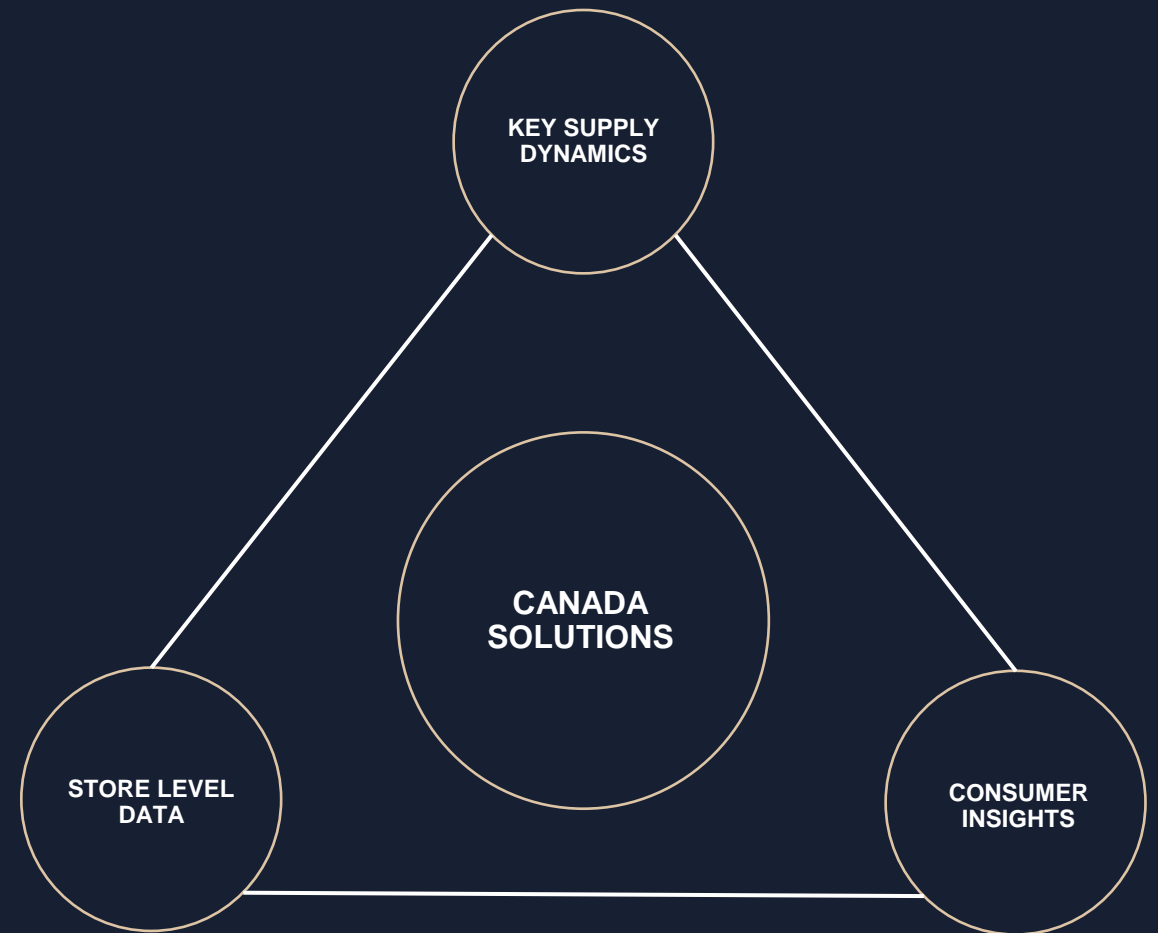




As Canada has a much different landscape for the beverage alcohol industry than the U.S., we are putting our efforts into reporting through three distinct areas which knowledge can be gained for the industry and its suppliers.

By providing solutions on Key Supply Dynamics, Consumer Insights and the provision of Outlet Level Data, CGA will be shining a 360 degree spotlight on the Canadian market. Our goal is to help suppliers dive deeper into this competitive space and not only unlock insights, but add value to the industry that this specific market has never been seen before.

Given that the proportion of population to On Premise outlets is roughly 3x smaller in Canada than it is in the U.S., we know that this market observes heightened competition from suppliers and retailers of all kinds, and warrants the value of critical insights to help combat the key dynamics within the channel.





ALL ABOUT OPUS CANADA

- Carried out twice a year, with responses from 5,000 On Premise consumers per survey. Nationally representative sample of age, gender and region
- Understand On Premise consumer behaviour, engagement and preferences for drinks brands, categories, flavours, etc.
- Ideal for profiling behaviors of their own and competitor brands to profile target customer sub-segments (for example, targeting Millennials) and to track repertoires, preferences, occasions, drivers and more
- Offers insight into brand and category engagement along with flavour / style / price / serve preferences
- Respondents ineligible if they haven't visited the On Premise at least once in the past three months



PHENOMENAL DATA. EXPERT INSIGHT.



COVID-19 RE-CONTACT SURVEY



Given the circumstances that have taken place, it was important for us to get consumers perceptions on COVID-19 to provide insights on how this has affected them in the present, and what they expect when bars and restaurants reopen. In the Spring 2020 version of our survey, we chose to ask consumers about the following topics, and more:

- ✓ Income
- ✓ Spend
- ✓ Alcohol Consumption
- ✓ Takeout / Delivery
 - ✓ Drink categories
 - ✓ Apps / services
 - ✓ Venues ordering from
 - ✓ Spend
- ✓ Behaviours when bars / restaurants open
 - ✓ Occasions
 - ✓ Drink categories
 - ✓ Venues
 - ✓ Concerns / frequency of visitation

KEY ELEMENTS

of the opus subscription

1. Full Market Overview showcasing the surveys results, delivered bi-annually
2. Key Trends Decks analyzing key on premise hot topics, delivered bi-annually
3. NCGA client team support to provide custom projects on all up to four RFPs – more available if needed
4. Key Metrics Excel Data sheet, delivered bi-annually



END GOAL: NCGA's data and analysis will position suppliers as leaders in the On-Premise space by providing a level of expertise that is above and beyond their competitors.





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MARKET OVERVIEW

WHAT'S INCLUDED?

DRINKING AND EATING OUT OF HOME

- ✓ Frequency/occasions per month
- ✓ Monthly spend
- ✓ Drink categories
- ✓ Path to purchase
- ✓ Daypart analysis
- ✓ Venues visited – including national accounts

OCCASIONS AND HOLIDAYS

- ✓ Specific eating & drinking occasions
- ✓ Holidays celebrated in On Premise

TRENDS

For example, draft cocktails, wine in can, etc

- ✓ If consumers have / are likely to / wouldn't try various trends

CATEGORY NOTE: Beer, Wine and Spirits all follow a very similar question structure to the above, as well as how we break out those sections with the various subcategories. Slight variances in questioning can occur depending on category.





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EXECUTIVE SUMMARY

WHAT'S INCLUDED?

THE IMPACT OF COVID-19

- ✓ Household & disposable income, spend
- ✓ Consumption habits

DURING COVID-19

- ✓ Where are consumers ordering alcohol from?
- ✓ Dayparts ordering
- ✓ Apps ordering from
- ✓ Factors ordering alcohol with delivery
- ✓ Drink categories with delivery
- ✓ Spend on delivery and outlook

TOWARDS A NEW NORMAL

- ✓ Willingness to return & frequency of visits
- ✓ Demographics of consumers who plan on visiting less
- ✓ Concerns about restaurants reopening
- ✓ Occasions, venues, drink categories missed the most

ON PREMISE SUSTAINABILITY

- ✓ Perceptions on outlets being sustainable
- ✓ What sustainable practices are consumers looking for in outlets?

ON PREMISE VISITORS AND MARIJUANA

- ✓ How many On Premise visitors legally buy/consume marijuana?
- ✓ Frequency of consumption
- ✓ Consumer overview
 - ✓ Demographics
 - ✓ Frequency visiting On Premise
 - ✓ Monthly spend
- ✓ How many visitors consume it with alcohol?
- ✓ Cross reference consumers vs drink categories

HEALTH AND WELLNESS

- ✓ Who is driving the trend and why?
- ✓ Abstaining from alcohol
- ✓ What drinks are consumers abstaining from?
- ✓ Outlook of consumers continuing these behaviours in the future
- ✓ Frequency of visits and value to the on premise

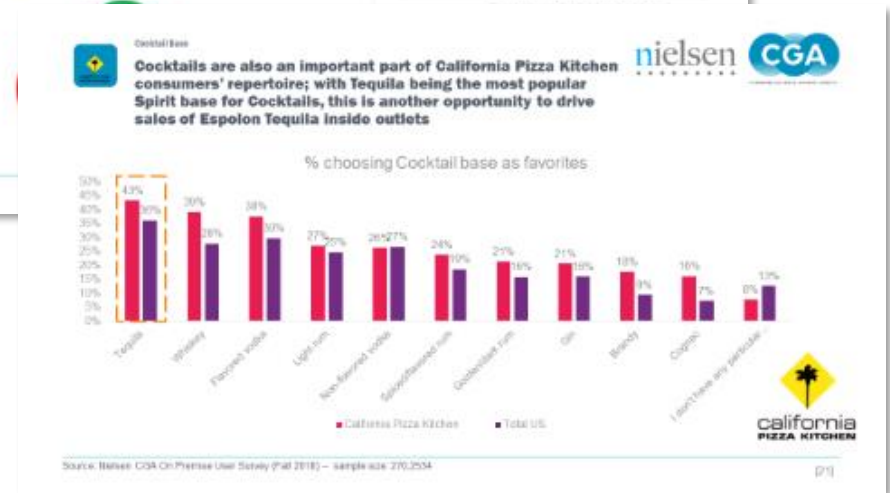
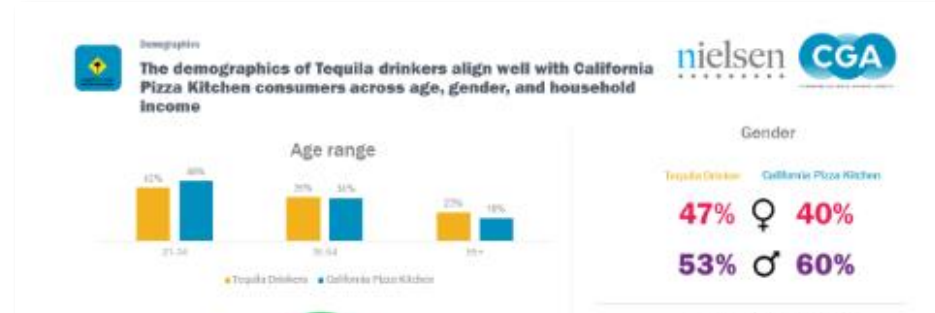


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RFP PROJECTS + SUPPORT

WHAT'S INCLUDED?

- ✓ Direct access to our client service team for bespoke projects



OPUS CAN HELP **WIN IN RFP** CONVERSATIONS WITH...

- ✓ **40 National Account Chains**
- ✓ **31 Hotel Chains**
- ✓ **27 Fast Food Chains**
- ✓ **13 Casinos**





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EXCEL WITH KEY METRICS

KEY METRICS

Rank drinks brands and retail brands by certain key values and demographics

Get data on:

- ✓ Usage
- ✓ Drink Categories at Chain
- ✓ Drinks Quality
- ✓ Value for Money
- ✓ Range of Brands
- ✓ Drink Promotions
- ✓ Most popular drinks brands by category



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SUMMARY

HOW WILL AN OPUS SUBSCRIPTION HELP ME?

1. The market overview which we deliver every time we run the large survey (twice per year) will give you plenty of insights across the whole Canadian market
2. The market packs are high quality presentations ready to go straight into sales decks and cover essential insights on Beer, Wine and Spirits
3. This will enable your team to go to your customers armed with high quality information covering all key elements of On Premise Bev Al.

Insights in the Market Overview will include:

General eating and drinking out habits

How consumers interact with different occasions and events within the on premise

Brand & category engagement, flavor / style / price / serve preferences

Which chains have crossover with your brands?

The ability to target sub-segments (ie, Millennials) and to track repertoires, preferences, occasions, drivers and many other factors

Detail around account type – insights on Neighborhood Bars, Nightclubs, Casual Dining etc



PHENOMENAL DATA. EXPERT INSIGHT.



DELIVERY AND COST

An annual subscription to OPUS delivers:

- ✓ **Two Market Overview decks** including results to all survey questions for beer, wine, spirits and softs. Delivered in June & October.
- ✓ **Two Exec Summary decks** showcasing the biggest and most important trends from the survey. Delivered in June & October.
- ✓ **Custom projects** - this allows the NCGA client services team to dig deep into the survey data for a specific business question. This could be used to help gain a listing at a certain retailer or to help understand a certain consumer type. To be used anytime through out the contract term – one year
- ✓ **Two Key Metrics Excel Data Sheet** giving quick and easy access to many rankings within the OPUS data. Delivered in June & October.

Please get in touch to discuss your bespoke package + costs

TIMELINES



AVAILABLE NOW: CONSUMER INSIGHTS + NATIONAL ACCOUNTS

A nationally representative On Premise specific survey consisting of 5,000 customers. Designed to help define the behaviours and preferences of consumers within the channel. This is built to provide support for insight, brand, and category development teams, and allows the opportunity for custom reporting.

National Account Support – Powered through our consumer insights, you will also be able to create compelling sales stories for key account RFP's, pitches, and discussions. This will serve as a solid evidence base for solutions around assortment, pricing, promotions, and menu listings.



AVAILABLE IN Q4: KEY SUPPLY DYNAMICS + STORE LEVEL DATA

A best in class outlet database allowing for efficient targeting and profiling of the Canadian On Premise. Similar to the U.S. version of TD Linx – this will allow suppliers / distributors to understand the changing landscape of the Canadian bar and restaurant industry. Used for sales planning, logistics and when targeting activations.

Powered by CLIP (Check-Level Insights Pool). Transactional level data from POS systems that delivers insights around sales performance which will allow you to analyze the value of your brand on a check, sales by daypart, specific event tracking, and much more. Analysis at hyper-local markets allows for a greater understanding of ever-changing sales dynamics within the channel.



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GET IN TOUCH

HELP US HELP YOU

With years of experience, research and the best expertise behind us, we have designed and built this service to enable suppliers to win in the Canadian On-Premise. We are looking for feedback to make OPUS Canada the best it can possibly be, and are keen to understand:

- The brands and categories are you interested in learning more about
- The key consumer trends do you wish to understand within the market
- The most important national accounts for you
- The cities & provinces that are most important to you

The CGA team are now taking calls / meetings to consult on the upcoming services. Please contact us with your availability.



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