



CGA by NIQ Canada On Premise Impact Reports

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Subscription Access: \$9,000* CAD

On Premise Impact Reports help suppliers, brokers, and operators across food and beverage keep a pulse of the industry by featuring current insights derived from a variety of our best-in-class tools.

4 PPT reports sent per month – with unlimited member access included in subscription



2 Sales Impact Reports

Provides sales velocity, ticket count, and check value 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.

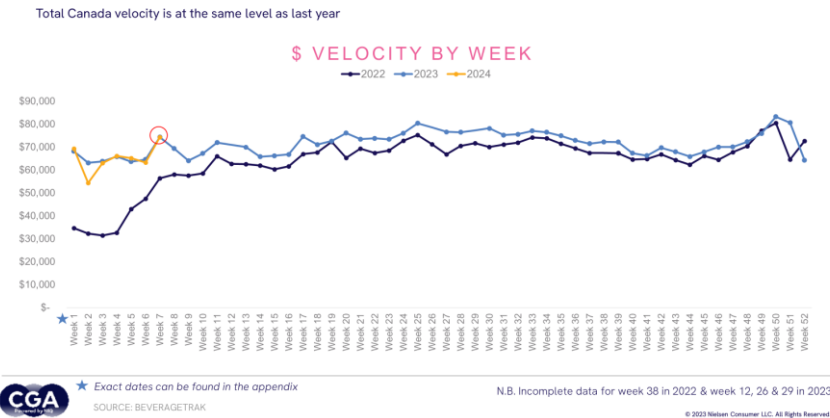


1 OPM Impact Report

The latest category share data with deep dives into various markets each month, detailing shifts in performance across Beer & Spirits.

CGA by NIQ Sales Impact Reports

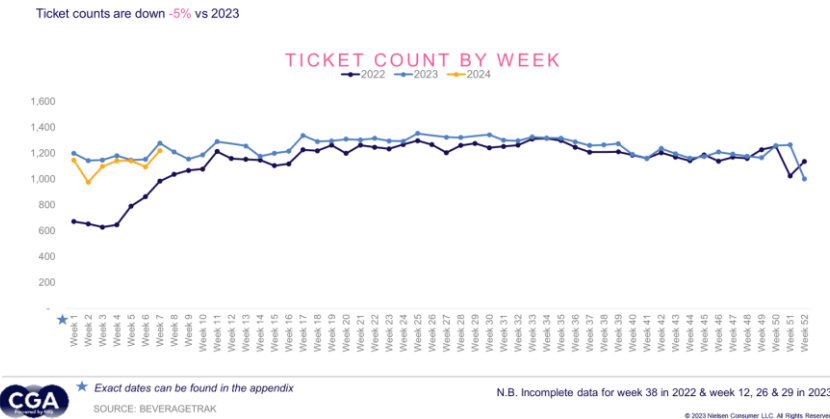
Total Canada Market Sales: Velocity



Ontario



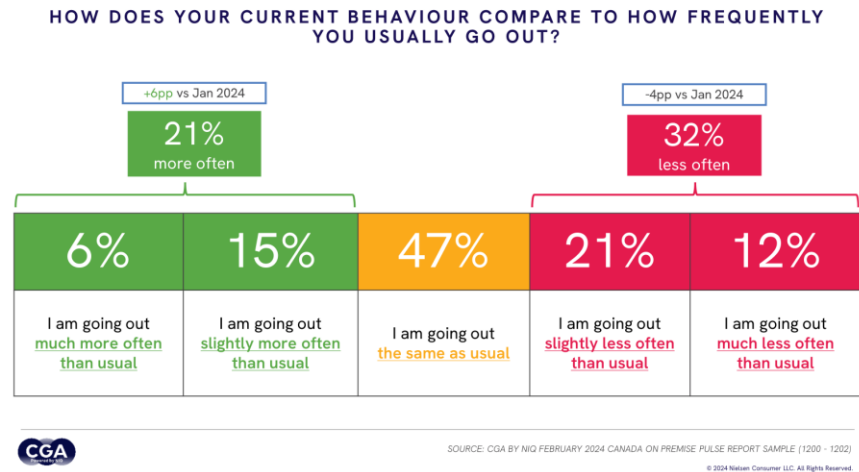
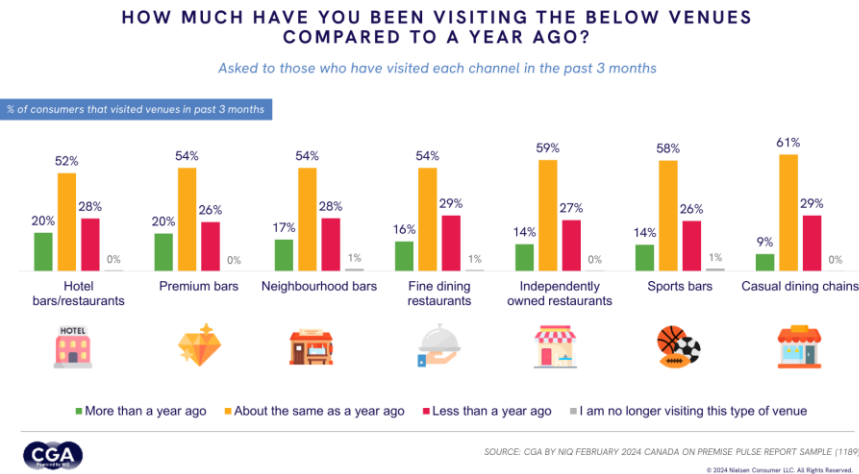
Total Canada Market Sales: Ticket Counts



Alberta



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Topics covered in the 2023 Consumer Pulse Reports

JAN

- + Dry January
- + Valentine's Day
- + BevAI in takeout/delivery
- + Visitation behaviour to new venues

FEB

- + Health Canada drinking guidelines
- + Category consumption vs 12 months ago
- + Value for money in the On Premise
- + St Patrick's Day

MAR

- + Specific channel visitation changes
- + Cocktail consumption vs 12 month ago
- + BevAI and food in the On Premise
- + Cross category & brand switching

JUN

- + Festivals
- + Impact of Cost of Living
- + On Premise satisfaction
- + Impact of Local
- + Changes in consumption vs 12 months ago

MAY

- + Cross category & brand switching
- + Premium mixers deep-dive
- + Premium vs value exploration
- + Path to purchase

APR

- + Stanley Cup Playoffs
- + Patio season
- + Deep-dive into softs & non-alc

JUL

- + Cocktail size trade-up
- + Engagement with wine & beer cocktails
- + Larger cocktail serve sizes
- + Importance of flavour
- + Hard seltzer bases

AUG

- + Importance of sustainability & ethical practices
- + Day of the week visitation
- + Premium vs value exploration

SEP
T

- + Importance of brand presence in the On Premise
- + NHL Week 1

DEC

- + Holiday season visitation
- + New Year's Eve visitation intentions
- + Takeout/delivery

NOV

- + Health Canada drinking guidelines
- + Category consumption vs 12 months ago
- + Value for money in the On Premise
- + St Patrick's Day

OCT

- + Thanksgiving
- + Halloween
- + Seasonal drink categories

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Over the last 52 weeks, less spirit volume was sold, largely due to a decline in distribution. On a more positive note, spirits are selling well in the outlets they are stocked in, being driven by Vodka, Tequila and Whiskey categories.

Market: Total Canada

VS YA trend	(Value) \$ % Chg YA	+7.1%
	(Volume) 9L EQ % Chg YA	-0.1%
	(Distribution) TDP % Chg YA	-7.1%
	(Volume Rate of Sale) 9L EQ/TDP % Chg YA	+7.5%
	Avg Price % Chg YA	+7.3%

Source: CGA by NIQ OPM Canada data - Spirits, mega category, value, volume & TDP. Rolling 52 W/E 10/7/2023 vs YA.



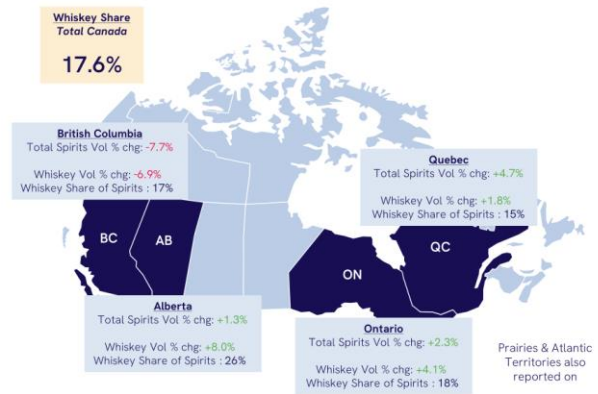
Vodka remains Canada's most popular Spirit, with a 22.1% share of volume sales during the period vs YA. Whiskey and Tequila achieved growth of +0.8% and +2.7% respectively, with all other categories in experiencing declines

Total Canada	Vodka	Whiskey	Cordials	Tequila	Gin	Rum	Brandy/Cognac
Volume share of Spirits	22.1%	17.6%	15.4%	14.6%	14.3%	13.6%	1.3%
Volume	918K	732K	640K	608K	593K	565K	56K
Volume % chg vs YA	+0.1%	+0.8%	-0.9%	+2.7%	-2.5%	-1.0%	-4.9%
Distribution % chg vs YA	-7.4%	-7.2%	-9.2%	-7.9%	-8.3%	-7.7%	-8.5%

Source: CGA by NIQ OPM Canada data - Spirits, Category, Volume & TDP. Rolling 52 W/E 10/7/2023 vs YA.



OPM not only reports nationally, but also across major provinces to benchmark brand, category, and manufacturer performance. Whiskey takes its highest share of spirits sales (26%) in Alberta, where the category achieved 8% growth by volume vs YA. Whiskey's share is much lower in Quebec at 15%, although total spirits sales here grew 4.7%.



Source: CGA by NIQ OPM Canada data - Spirits, Category, Volume & share Rolling 52 W/E 10/7/2023 vs YA.

For further details on CGA's On Premise Measurement solutions, along with support in understanding trends at category, segment and brand level within the On Premise, contact Mitch Stefani at Mitch.x.Stefani@nielseniq.com or download more information [here](#)

Sign up to receive On Premise news & Insights for the Canadian market, [here](#)

Contact Us

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