OXFORD PARTNERSHIP | MARKET WATCH™

Christmas Review 2023

Draught volume data powered by VIANET
DATA. REIMAGINED.

Source : Oxford Market Watch January 24

Mad Friday sales boost signifies a resurgence to pre-pandemic drinking habits, with Draught sales **+8.8%** for the December. City Centres show a welcome revival **+8.2% vs. 22**. Driven by a **+4.7%** in consumer visit time and **+2.6%** increase in visitor numbers, all whilst the trade are open **-2.4%** less time than 22

December 2023 vs. December 2022

- Average consumer dwell time grew at a total level to **128** mins vs. 123 mins in the same week last year **(+4.3%)** with Suburbia driving the highest growth **+4.7%.**
- All locations benefitted from an increased consumer visit length vs. last year, with City Centre outlets +3.0% and +4.0%.
- We see footfall **increase** vs. last year **+2.6%** across all locations. **Biggest** increases are in **Rural & City Centre** venues as we see the return of Office get together and friends celebrating the festive season. **Suburbia** is also performing well versus 2022, with **all** days performing ahead of last year, this is a strong performance given the **huge growth seen in 2022**
- This is set against a backdrop of **less trading hours** as venues trade for **-2.5% less time than in 2022**
- December sales soar as the average pub sell **+8.8% more Draught Beer & Cider** than in 2022, with the last two weeks of December **+7.6%.**
- Christmas 2023 contributes **4 of the biggest sales days of 2023**, which mirrors 2019 and pre-pandemic levels and echoes trends seen in the Off Trade
- **Mad Friday** leading in Draught sales signifies a notable **resurgence** to pre-pandemic drinking habits
- In the last two weeks, we see Ale, driven by Cask, as the biggest category. **Stout is the big winner** over the festive period **+24%,** with Non & Low Alcohol Craft, World Lager and Apple Cider also doing well. Biggest loser is **Premium Lager** with Core Lager and Flavoured Cider also trailing 2022's sales

Source : Oxford Market Watch January 24

Christmas Review 2023 Consumer Behaviour

Source : Oxford Market Watch January 24

Dwell Time 18th – 31st December 23 vs 12th Dec – 19th Dec 22 vs. 1st Jan 23 Base 52,595 Outlets

137 mins	**135 mins**	**127 mins**
+3.0%	**+4.7%**	**+4.0%**

Average consumer dwell time grew at a total level to **128** mins vs. **123** mins in the same week last year (**+4.3%)** with Suburbia driving the highest growth **+4.7%.** All locations benefitted from an increased consumer visit length vs. last year, with City Centre outlets **+3.0%** and **+4.0%.**

Source : Oxford Market Watch January 24

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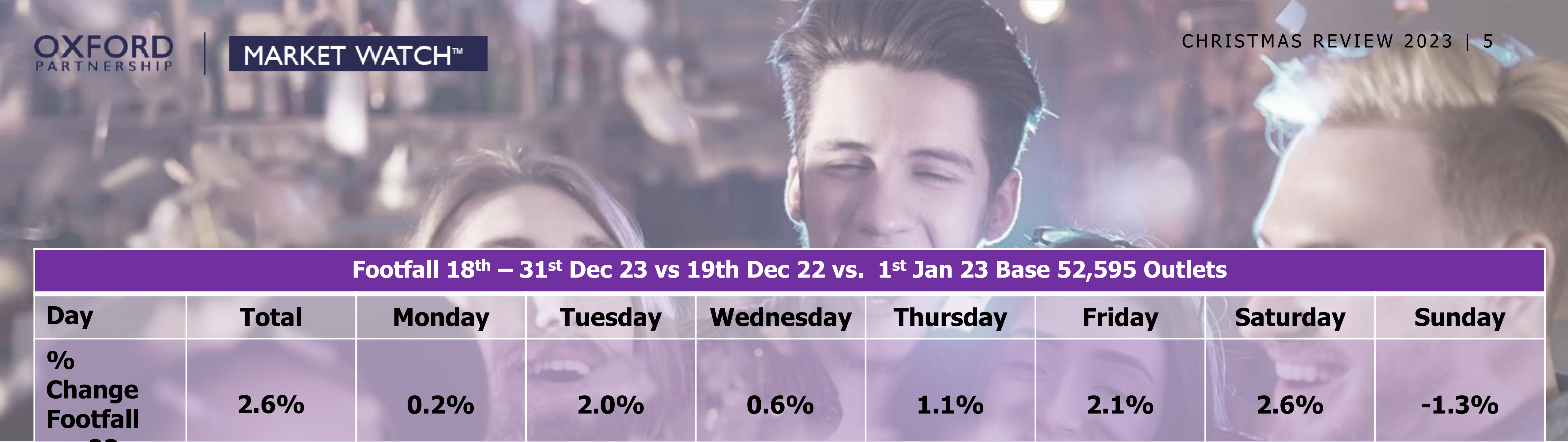

Footfall 18th – 31st Dec 23 vs 19th Dec 22 vs. 1st Jan 23 Base 52,595 Outlets								
Day	**Total**	**Monday**	**Tuesday**	**Wednesday**	**Thursday**	**Friday**	**Saturday**	**Sunday**
% Change Footfall vs. 22	**2.6%**	**0.2%**	**2.0%**	**0.6%**	**1.1%**	**2.1%**	**2.6%**	**-1.3%**
City	**2.6%**	**1.4%**	**2.9%**	**2.2%**	**2.1%**	**2.7%**	**2.8%**	**-1.8%**
Suburban	**2.4%**	**0.8%**	**1.7%**	**1.4%**	**2.2%**	**4.7%**	**3.0%**	**3.1%**
Rural	**3.7%**	**3.7%**	**4.2%**	**4.5%**	**5.1%**	**5.8%**	**3.3%**	**4.4%**

We see footfall **increase** vs. last year +2.6% across all locations. **Biggest** increases are in **Rural & City Centre** venues as we see the return of Office get together and friends celebrating the festive season. **Suburbia** is also performing well versus 2022, with **all** days performing ahead of last year, this is a strong performance given the huge growth seen in 2022.
This is set against a back drop of **less trading hours** as venues trade for **-2.5% less time than in 2022**

Source : Oxford Market Watch January 24

Christmas Review 2023 Volume

Draught volume data powered by VIANET

Source : Oxford Market Watch January 24

December sales soar as the average pub sell +8.8% more Draught Beer & Cider than in 2022, with the last two weeks of December +7.6%.

290 Million Pints Sold in December! *

The average pub serves 7,658 pints of Draught Beer & Cider over December which equates to a £36k income generator

+619 Extra Pints Sold Vs 2022*

City Centre +8.2%

Suburban +3.2%

Rural +6.8%

Source : Oxford Market Watch January 24
Base: 9,050 Venues Volumes Quoted Dec 1st – Dec 31st 2023

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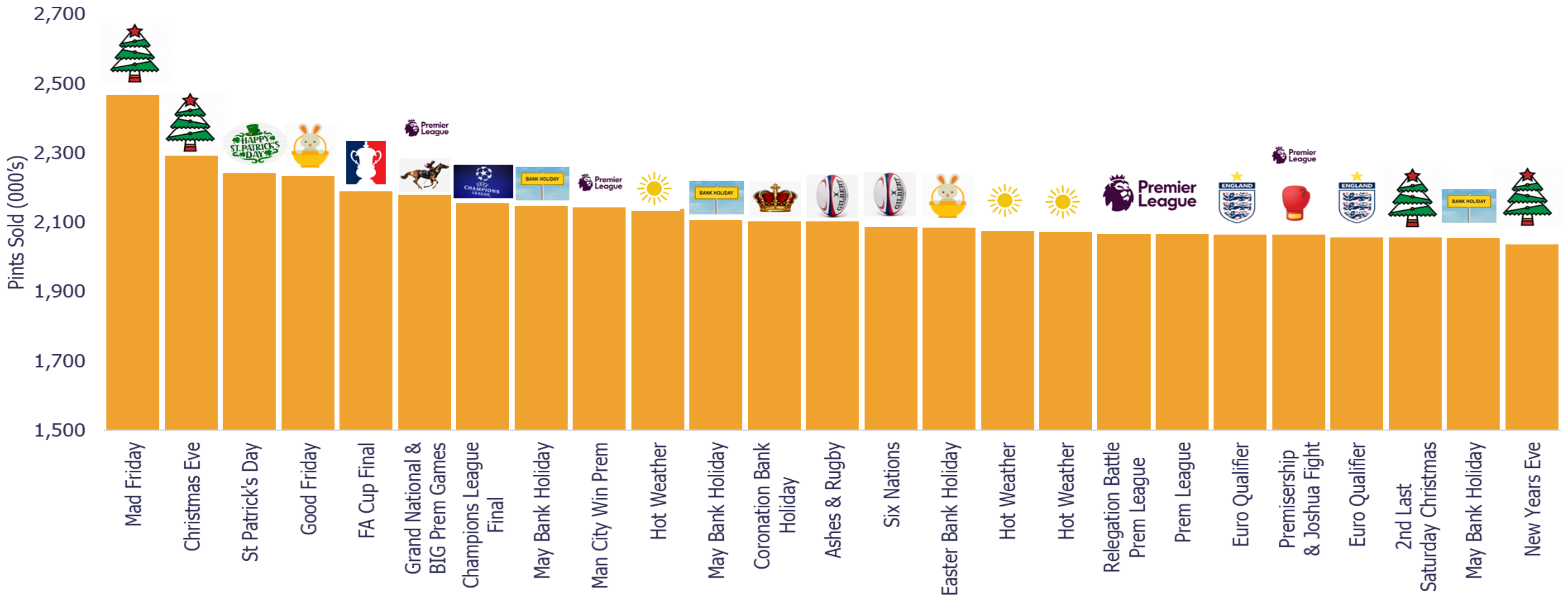
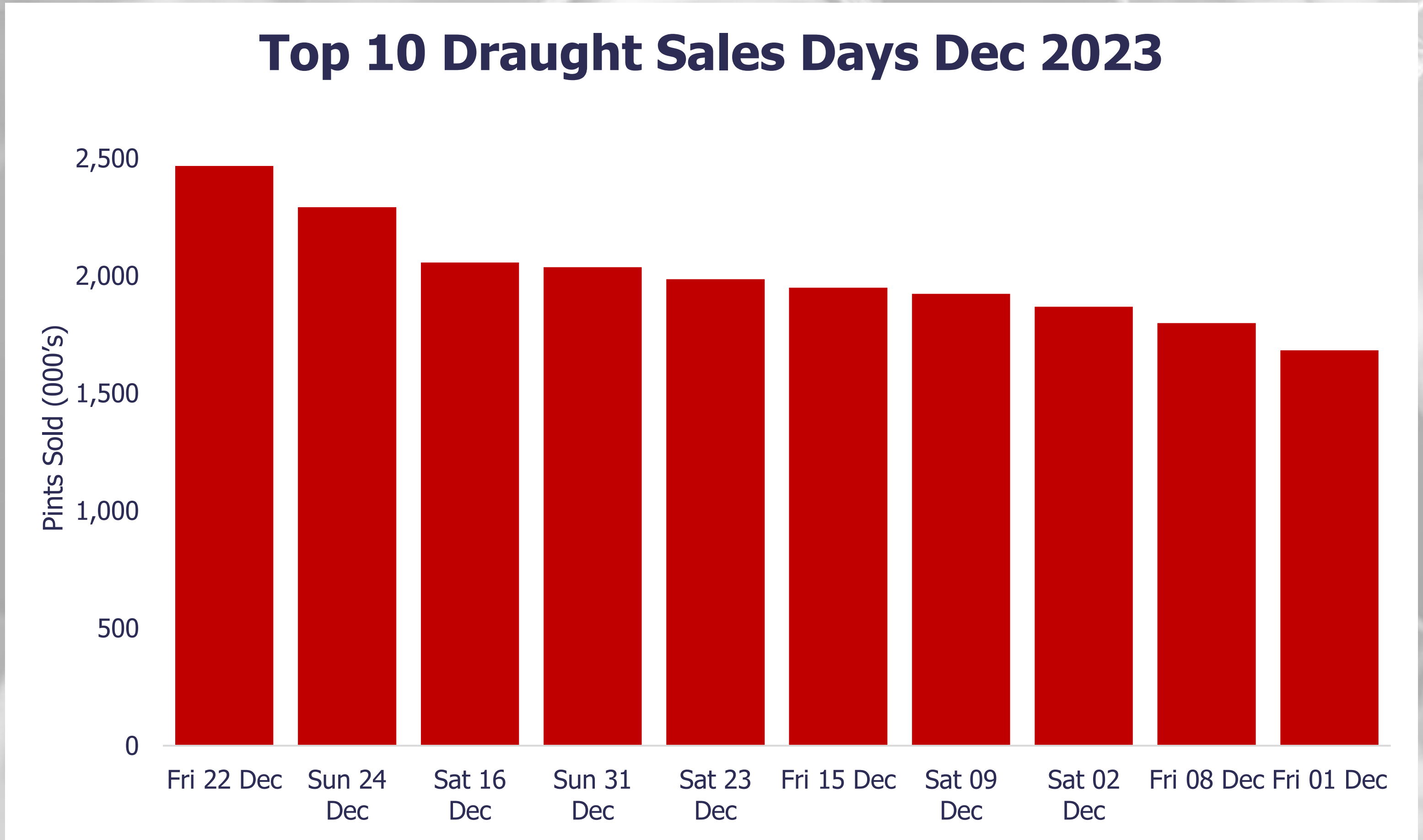
Christmas 2023 contributes 4 of the biggest sales days of 2023, which mirrors 2019 and pre-pandemic levels and echoes trends seen in the Off Trade



Source : Oxford Market Watch January 24

Mad Friday leading in Draught sales signifies a notable resurgence in pre-pandemic drinking habits



- The Top 10 Days in December show the importance of the last few days before Christmas, with the consumer returning to pre-pandemic drinking occasions over the festive season.
- Mad Friday winning out and becoming the **biggest** draught Beer & Cider day of the year.
- Christmas Eve came in **second** and became the second biggest sales day for Draught Beer and Cider in 2023.
- New Years Eve came in lower than the second to last Saturday, falling on a Sunday, with damp wet weather.

Source : Oxford Market Watch January 24

Base: 9,050 Venues Volumes Quoted Dec 1st – Dec 31st 2023

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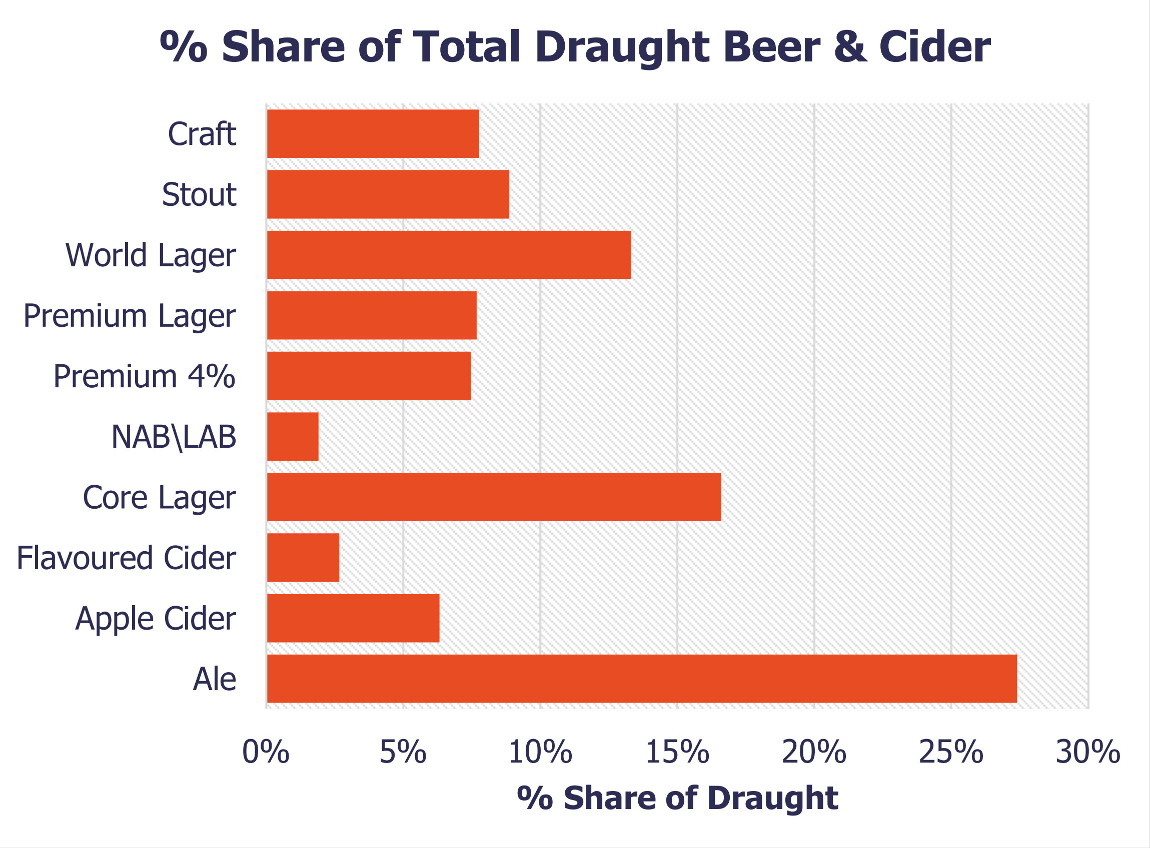
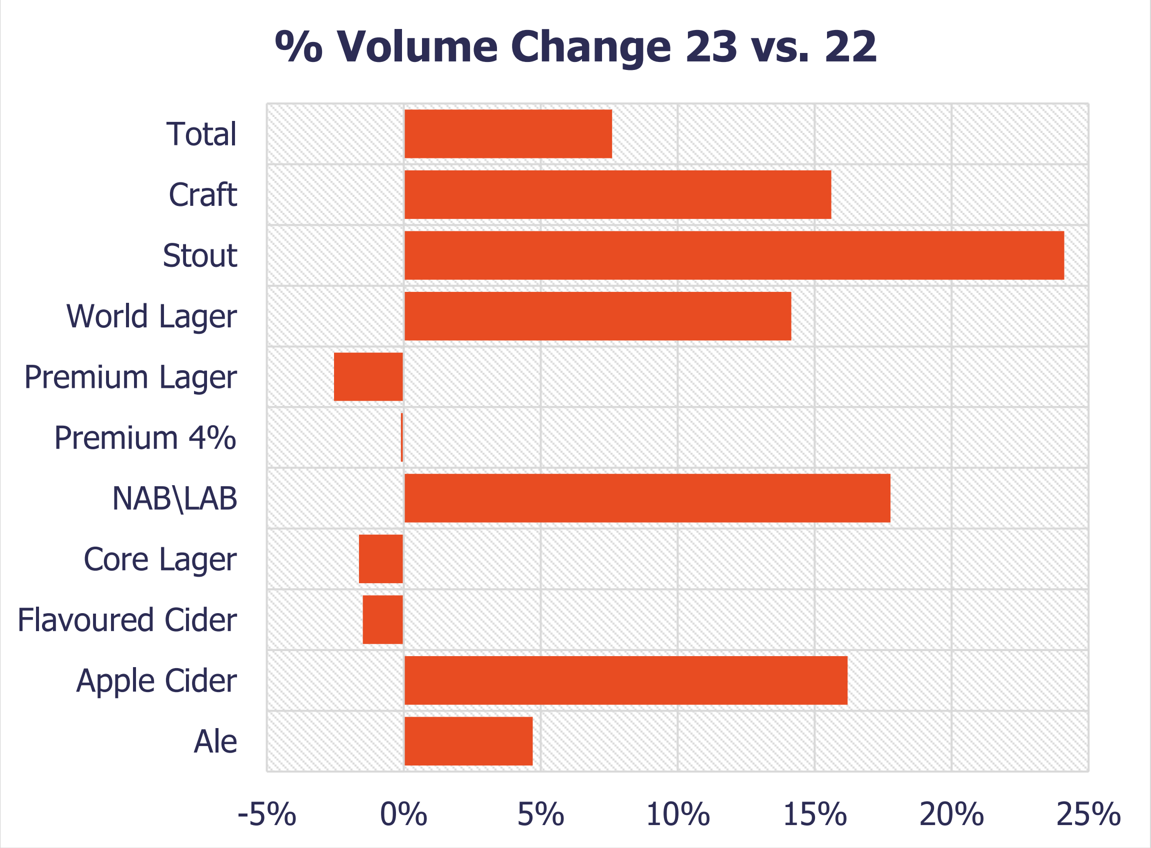
In the last two weeks, we see Ale, driven by Cask, as the biggest category. Stout is the big winner over the festive period +24%, with Non & Low Alcohol Craft, World Lager and Apple Cider also doing well. Biggest loser is Premium Lager with Core Lager and Flavoured Cider also trailing 2022's sales





Source : Oxford Market Watch January 24

Base: 9,050 Venues Volumes Quoted Dec 18th – Dec 31st 2023