

Site Summary



Horse & Groom SP27ES

SP27ES

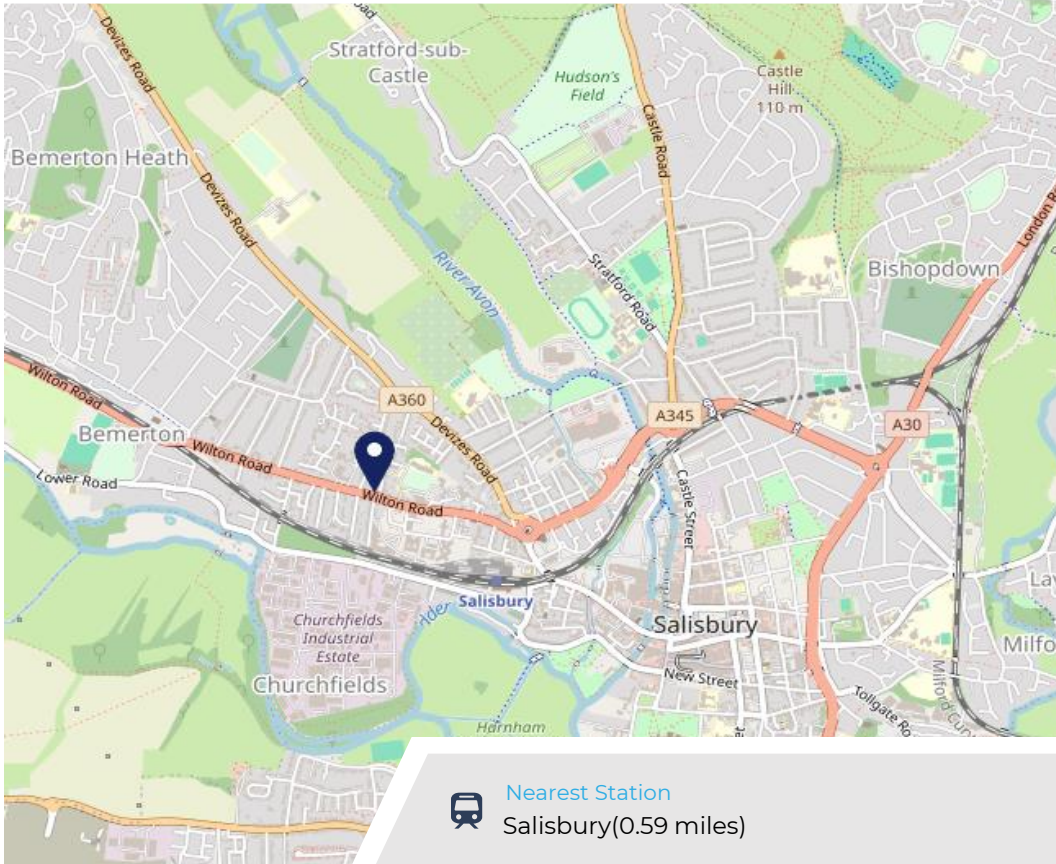
Punch T&L

Work Area
Salisbury

Region
South West

TV Region
South

Urbanicity
Urban city and town



ATV
£9.46



Gender
63.73%
Male



Affluence
49.81%
Low Income



Segmentation
35.05%
On A Budget



Age Group
37.25%
45 to 54



Visit Day
23.50%
Fri

Top Competitors

The Kings Head Inn **#1**
SP12ND
 JD Wetherspoon

Chapel Nightclub **#2**
SP12AP
 Pub / Bar

Halfway House **#3**
SP27JY
 Pub / Bar



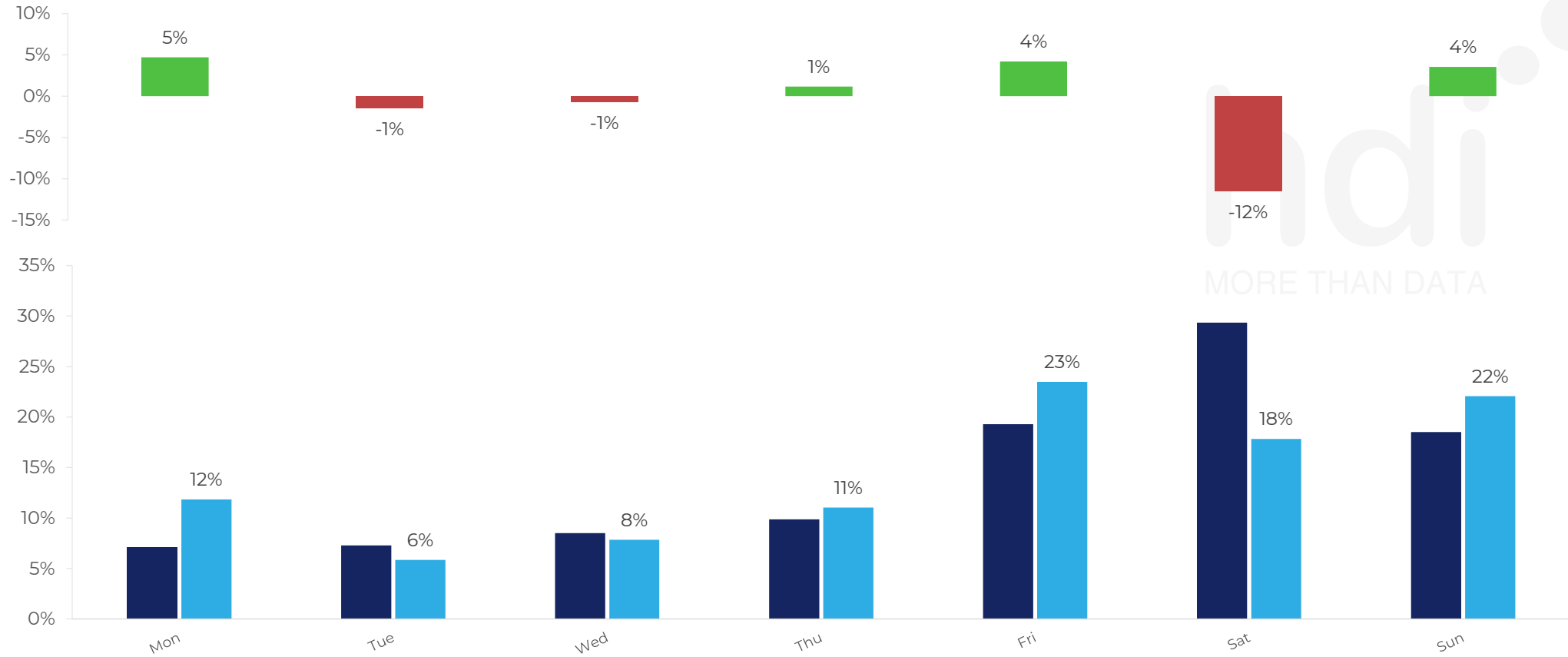
Nearest Station
Salisbury(0.59 miles)



Spend by Weekpart

How is customer spend distributed throughout the week for Horse & Groom SP27ES versus its competitors?

% of spend for Horse & Groom SP27ES and 97 Chains in 3 Miles from 31/05/2023 - 22/05/2024 split by Day of Week



■ Competitor

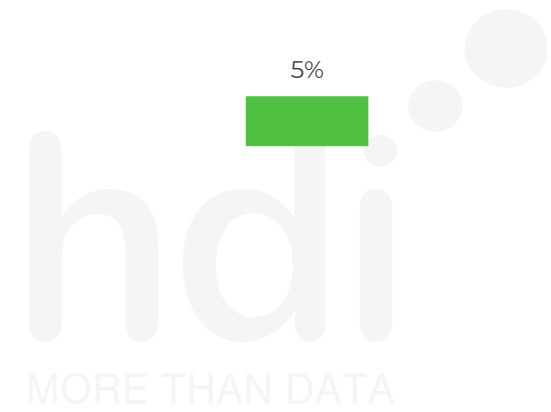
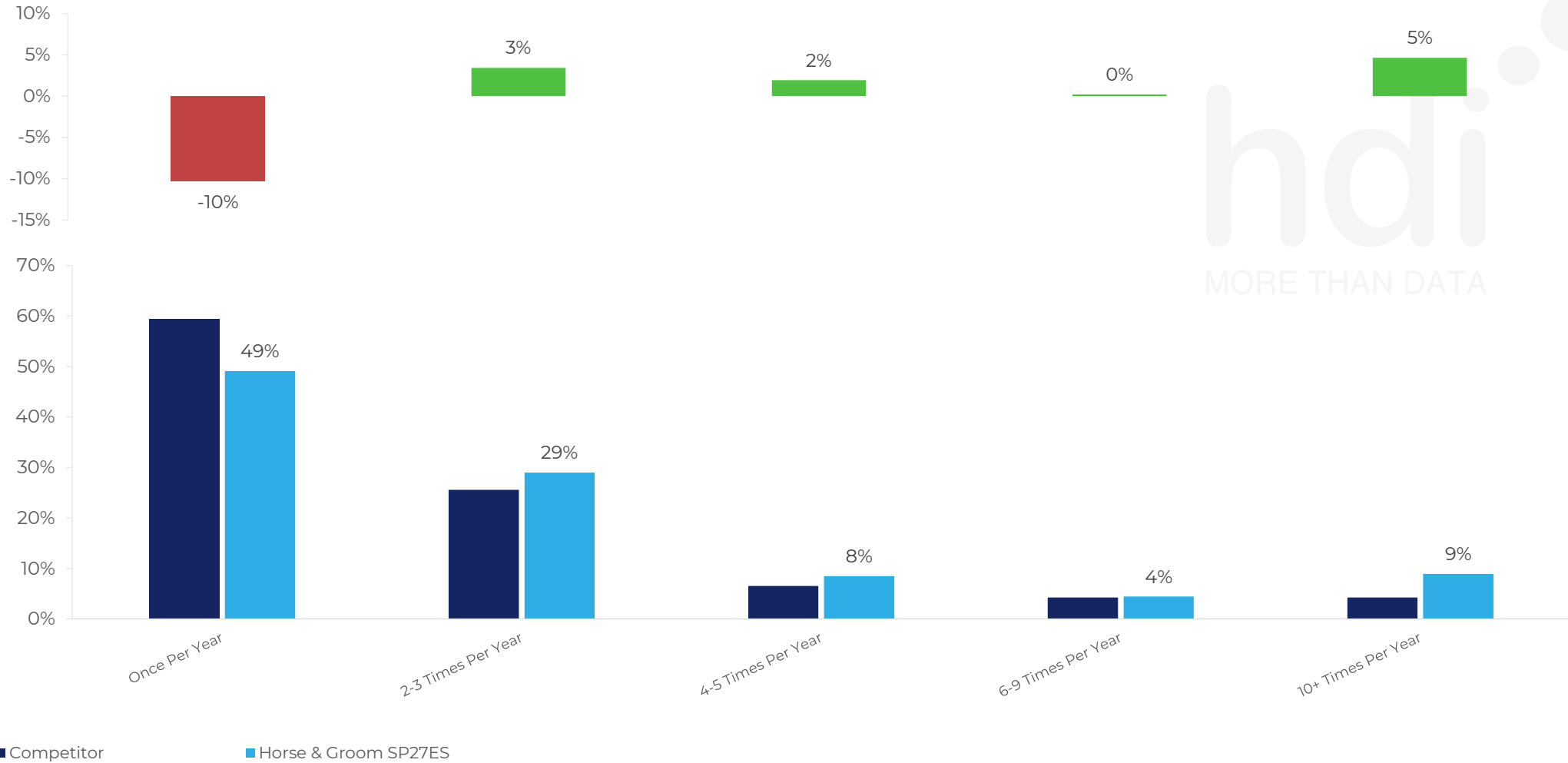
■ Horse & Groom SP27ES



Visit Frequency

How frequently per year do customers visit Horse & Groom SP27ES versus its competitors?

% of customer numbers for Horse & Groom SP27ES and 97 Chains in 3 Miles from 31/05/2023 - 22/05/2024 and the number of visits made Per Annum

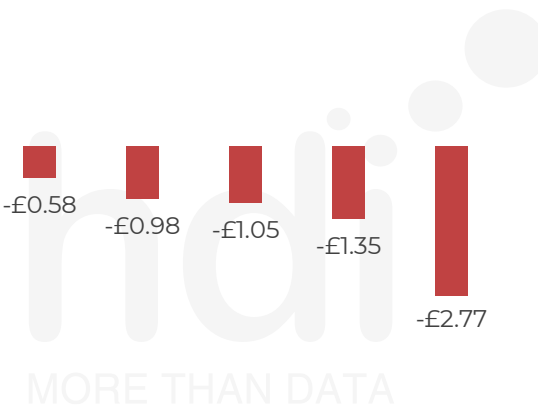
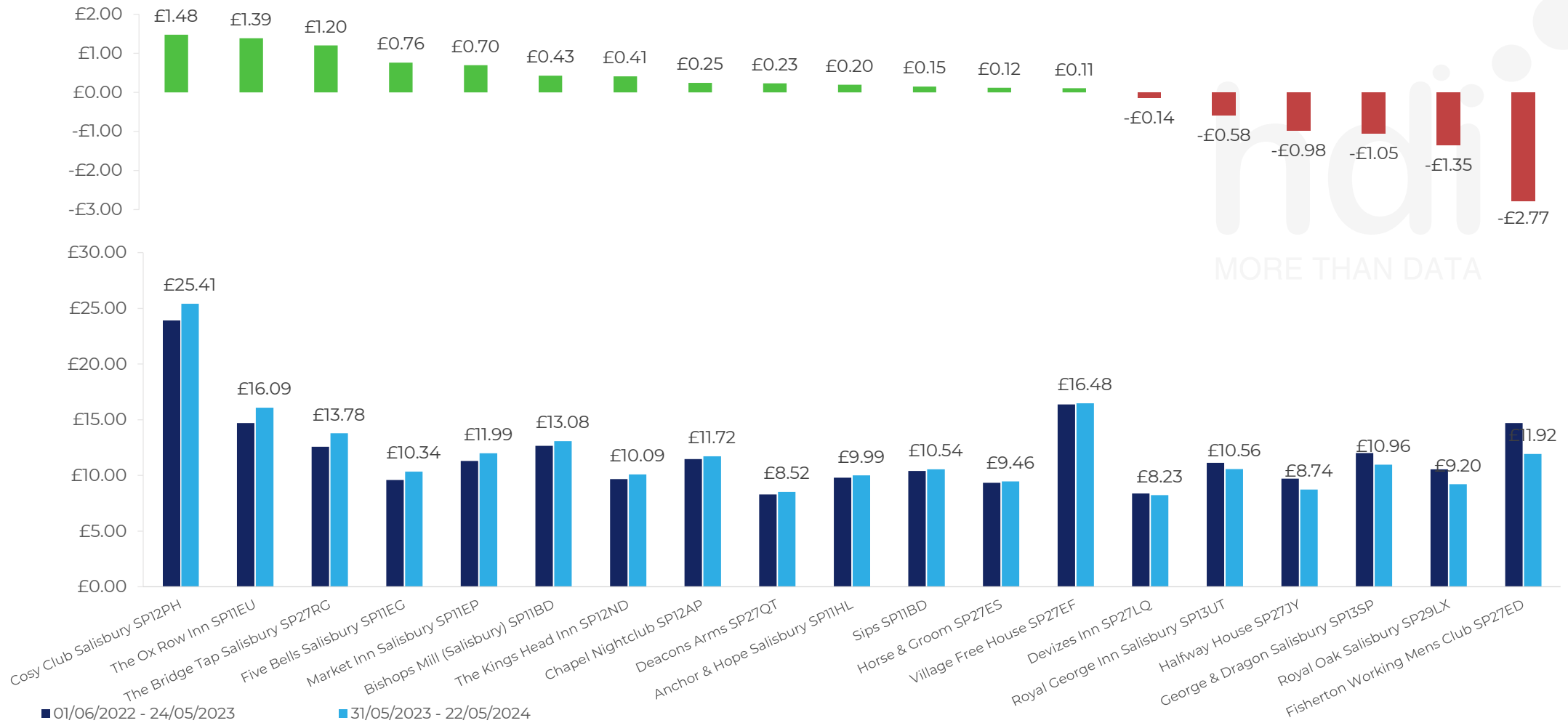


■ Competitor

■ Horse & Groom SP27ES

ATV Change

How has ATV changed between two date ranges?

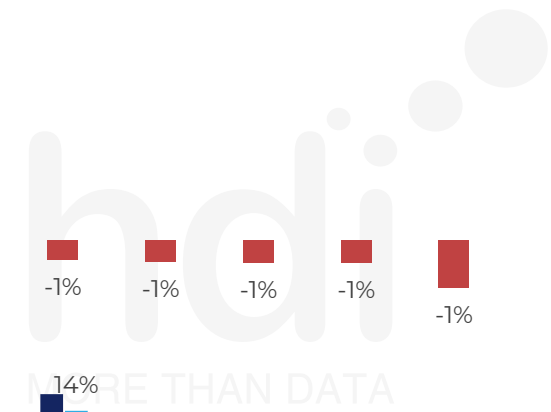
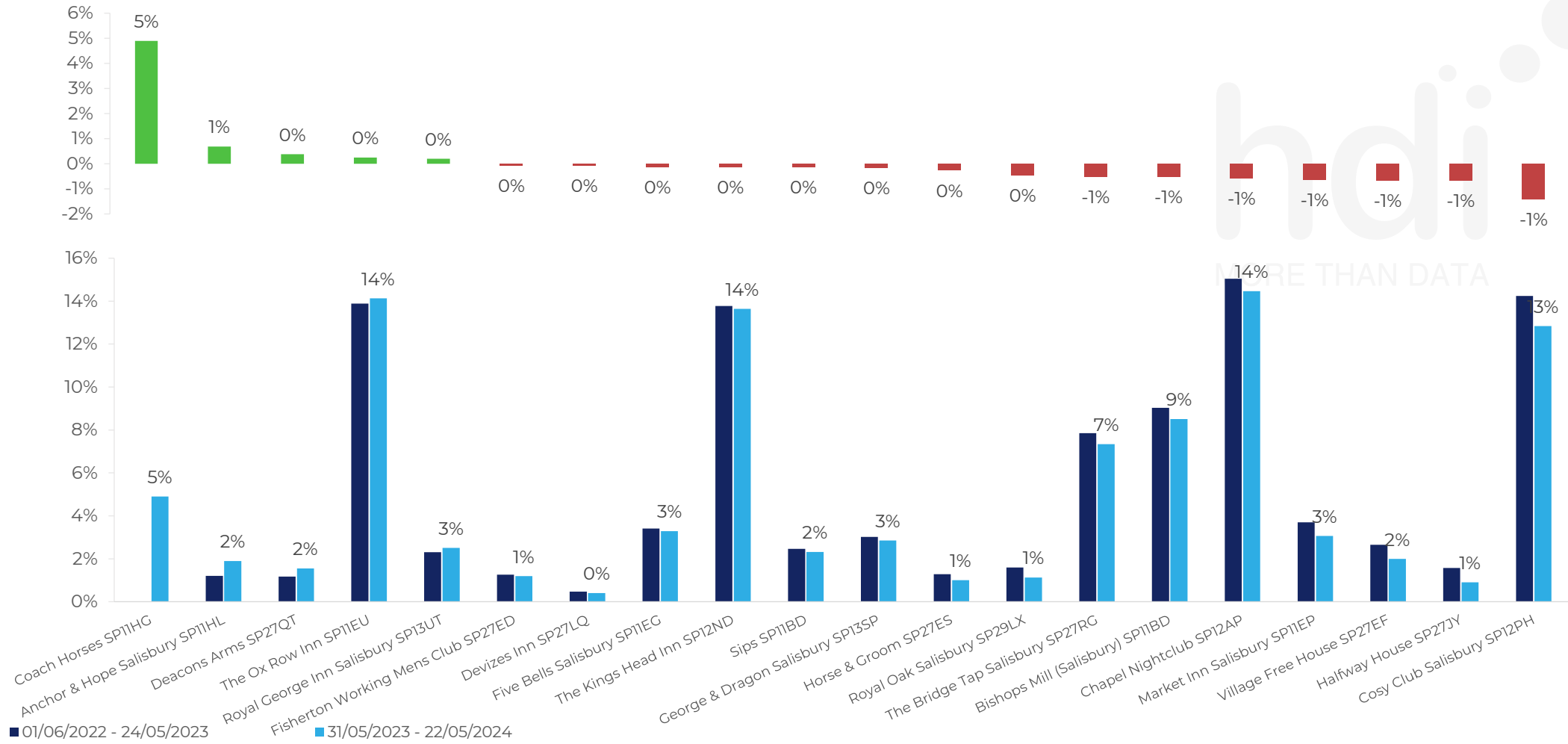




Market Share Change

How has market share changed between two date ranges?

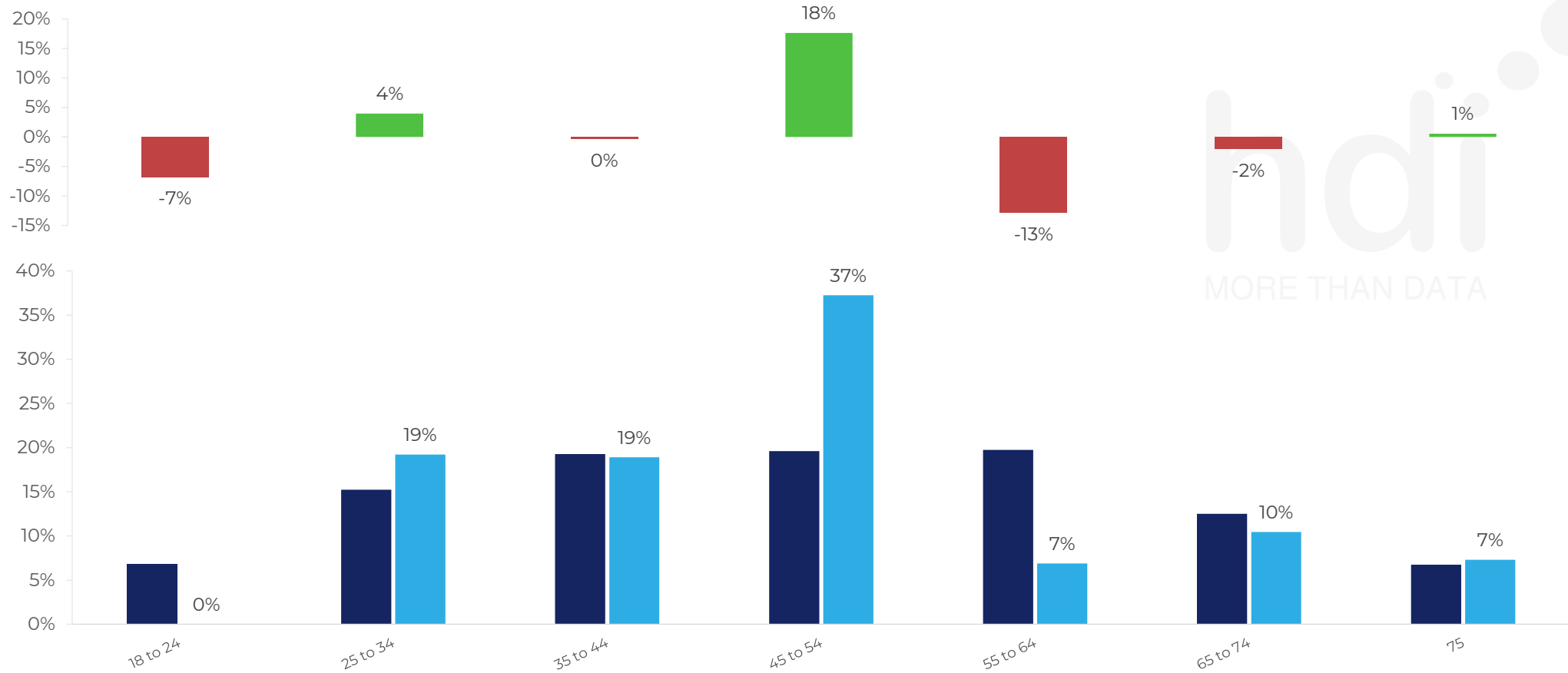
% of market share spend for Horse & Groom SP27ES and 97 Chains in 3 Miles from 31/05/2023 - 22/05/2024



Age

How does the age profile of customers who visit Horse & Groom SP27ES compare versus its competitors?

% of spend for Horse & Groom SP27ES and 97 Chains in 3 Miles from 31/05/2023 - 22/05/2024 split by Age Range



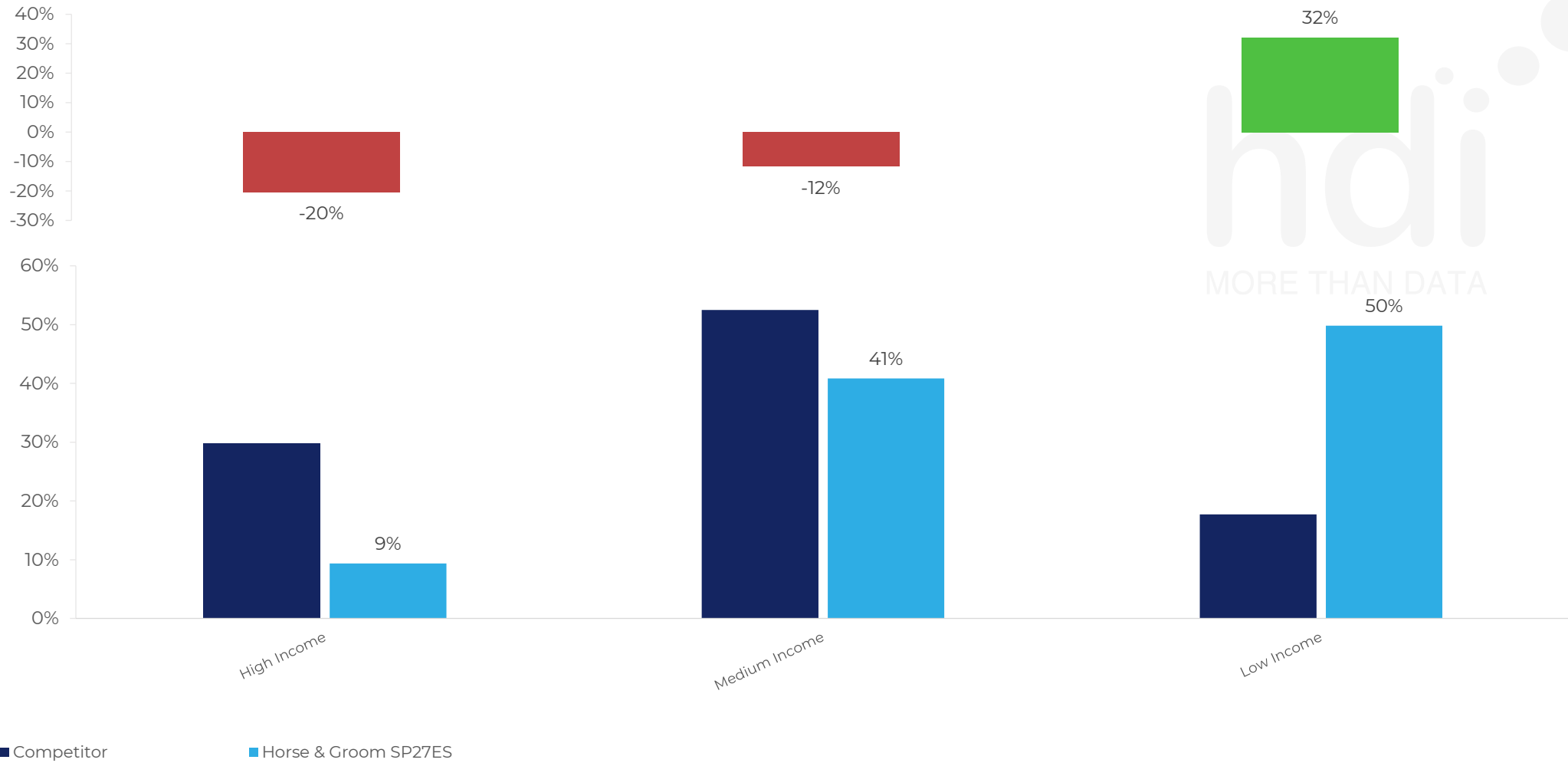
■ Competitor

■ Horse & Groom SP27ES

Affluence

How does the affluence of customers who visit Horse & Groom SP27ES compare versus its competitors?

% of spend for Horse & Groom SP27ES and 97 Chains in 3 Miles from 31/05/2023 - 22/05/2024 split by Affluence

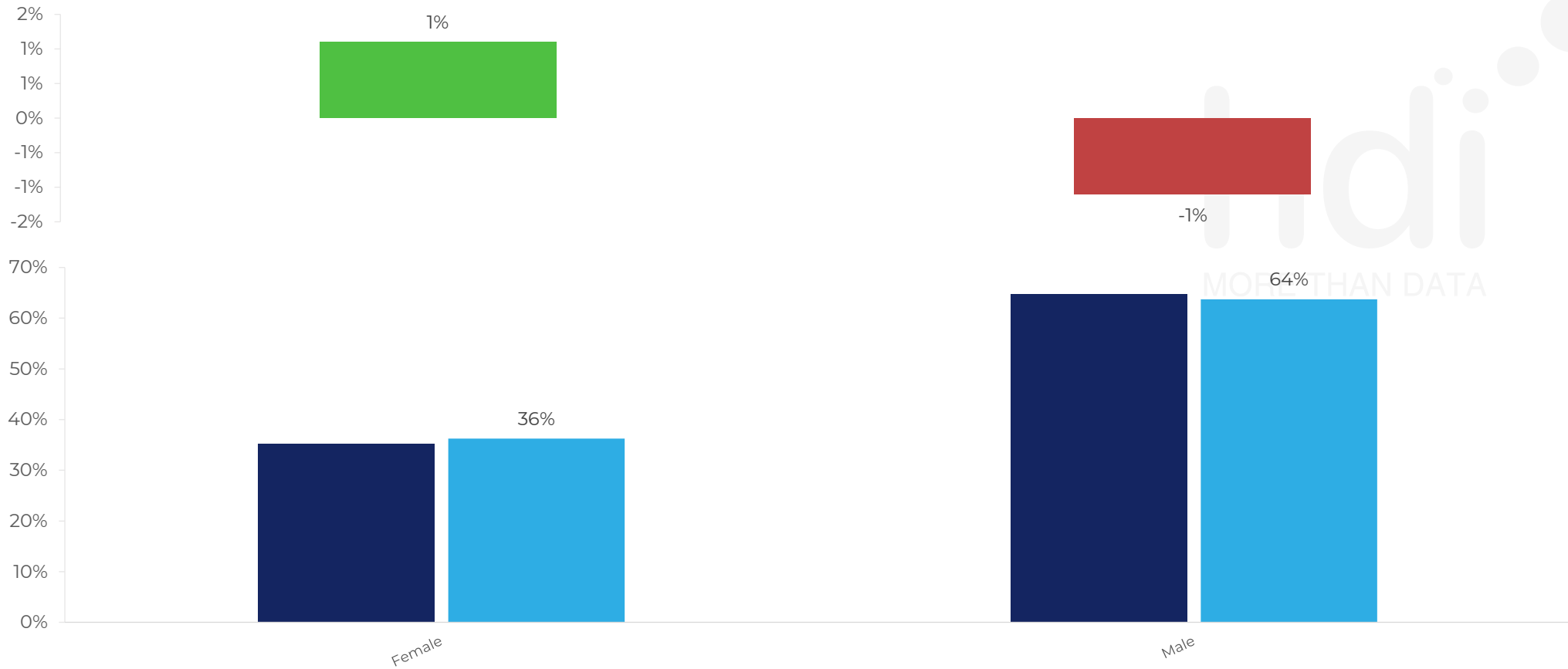




Gender

How does the gender profile of customers who visit Horse & Groom SP27ES compare versus its competitors?

% of spend for Horse & Groom SP27ES and 97 Chains in 3 Miles from 31/05/2023 - 22/05/2024 split by Gender



■ Competitor

■ Horse & Groom SP27ES

SEGMENT SNAPSHOTS

1 – Family Familiar

- Value-oriented family groups who are particularly prevalent in the Midlands and the North.
- These customers more regularly visit McDonalds or Nandos or order Just Eat but do occasionally use suburban pubs for eating – particularly on a Sunday.
- Great value is essential with menu preferences for grilled meat, the kids menu and soft drinks.



2 – Occasional & Local

- Occasional & Local are lower frequency habitual drink-led customers.
- These value-oriented customers typically drink in lower priced suburban locations midweek.
- Occasional & Local favour recognised mainstream drinks brands such as Carling, Fosters, John Smiths or Smirnoff.



3 – Mid-week Seniors

- Mid-week Grey Social customers are older customers who prefer a peaceful pub – typically visiting midweek daytime and often avoiding busy events.
- These customers are of varying affluence.
- They prefer classic menu items such as fish and chips and hunters chicken with a lean towards cask ale, hot drinks and wines.



4 – PART OF THE PUB

- Part of the Pub customers are very habitual value-oriented drink-led customers.
- They drink in their local pub during the week with a preference for mainstream draught (Carling, Fosters, John Smiths, Strongbow) and recognised brands such as Bud, Smirnoff and Jamesons.
- These customers are more likely to visit betting shops, off licences and watch live football.



5 – METRO SOPHISTICATES

- Metro Sophisticates are younger, more affluent guests often found in and around larger cities.
- These customers favour more premium venues and tend to make healthier, more ethical choices.
- Living active lives, Metro Sophisticates will choose more premium brands such as Neck Oil, Fever Tree and Bombay Sapphire. They're interested in vegetarian / vegan menu options.



6 – YOUNG & CONNECTED

- Young & Connected customers are typically younger, less affluent customers. They favour branded businesses and have high online usage
- They tend to use lower-priced pubs in high street locations with a preference for spirits, cocktails, shots and burgers in Punch sites.
- Young & Connected customers are responsive to events in the pub, e.g. live sport, bank holidays.



7 - Bubbly Weekenders

- Bubbly Weekenders are slightly health-conscious younger customers who confine their pub use to high street venues at the weekend.
- Disproportionately female, Bubbly Weekenders favour spirits, cocktails and shots when in Punch sites.
- If eating, they've an interest in vegetarian / vegan dishes and have a preference for chicken burgers.



8 – UPMARKET DINERS

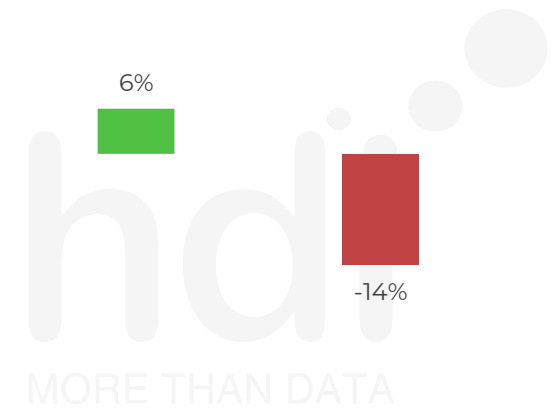
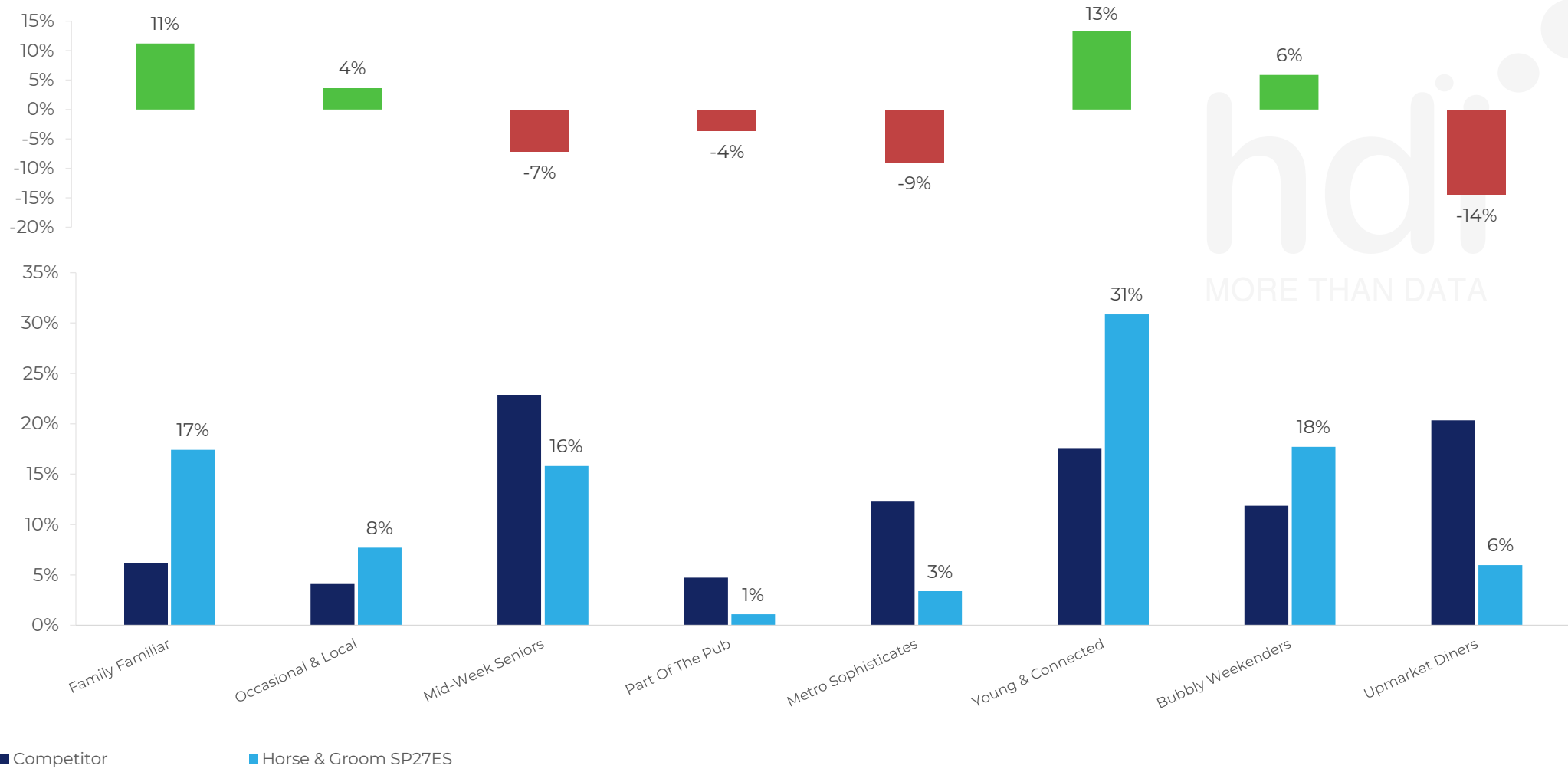
- Upmarket Diners are affluent, older guests who tend to visit higher-priced rural pubs during the daytime (often Sunday) for food.
- These active customers make healthy, ethical choices and aren't overly price conscious.
- When with Punch, Upmarket Diners are more likely to buy a roast or a special. If buying drinks, they lean towards wine, hot drinks and softs.



Punch Segmentation

How does the Custom segmentation profile of customers who visit Horse & Groom SP27ES compare versus its competitors?

% of spend for Horse & Groom SP27ES and 97 Chains in 3 Miles from 31/05/2023 - 22/05/2024 split by Segment



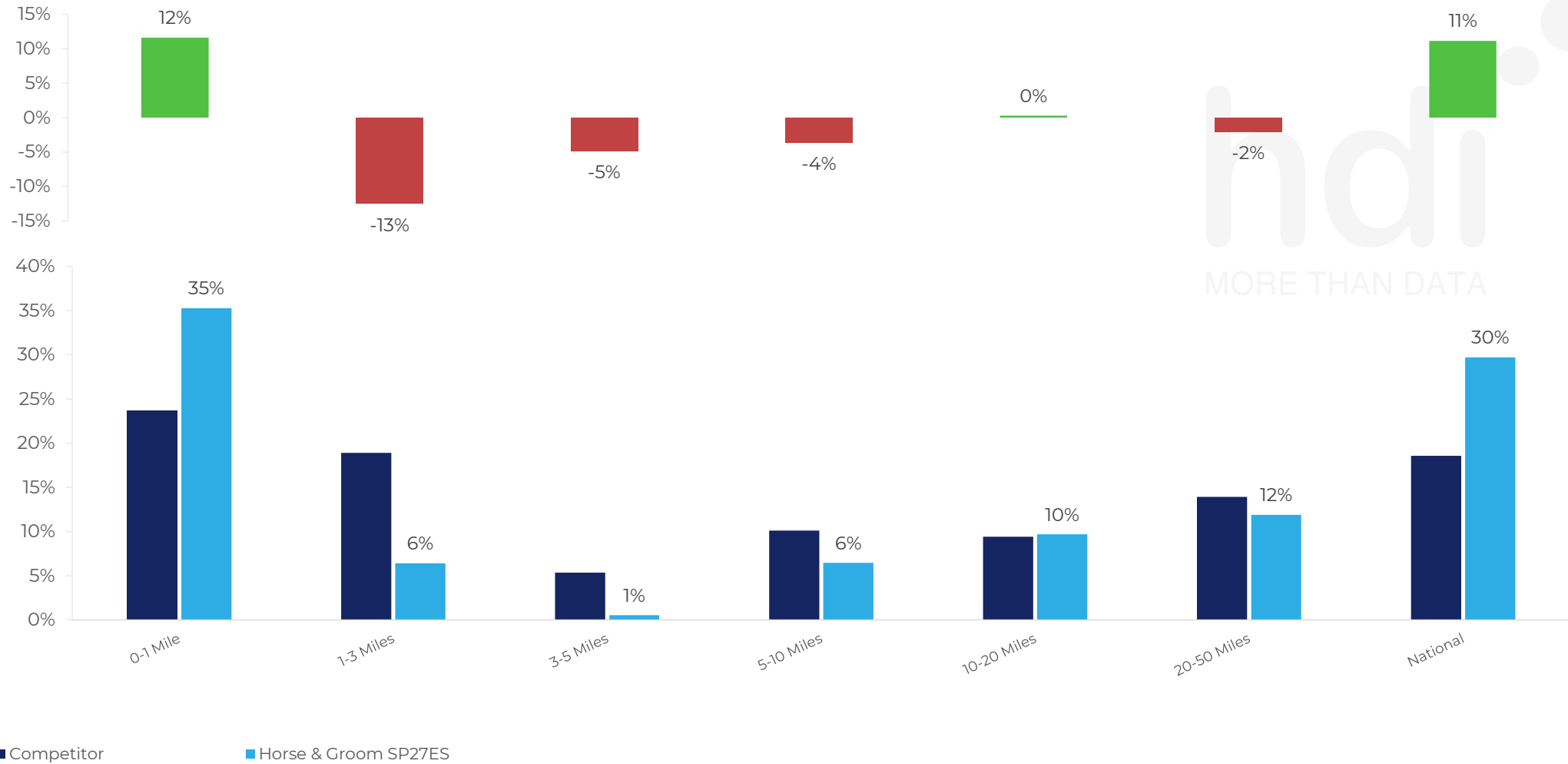
Competitor

Horse & Groom SP27ES

Spend by Distance

How does the spend profile of Horse & Groom SP27ES compare versus its competitors based on travel distances?

% of spend for Horse & Groom SP27ES and 97 Chains in 3 Miles from 31/05/2023 - 22/05/2024 split by Distance travelled

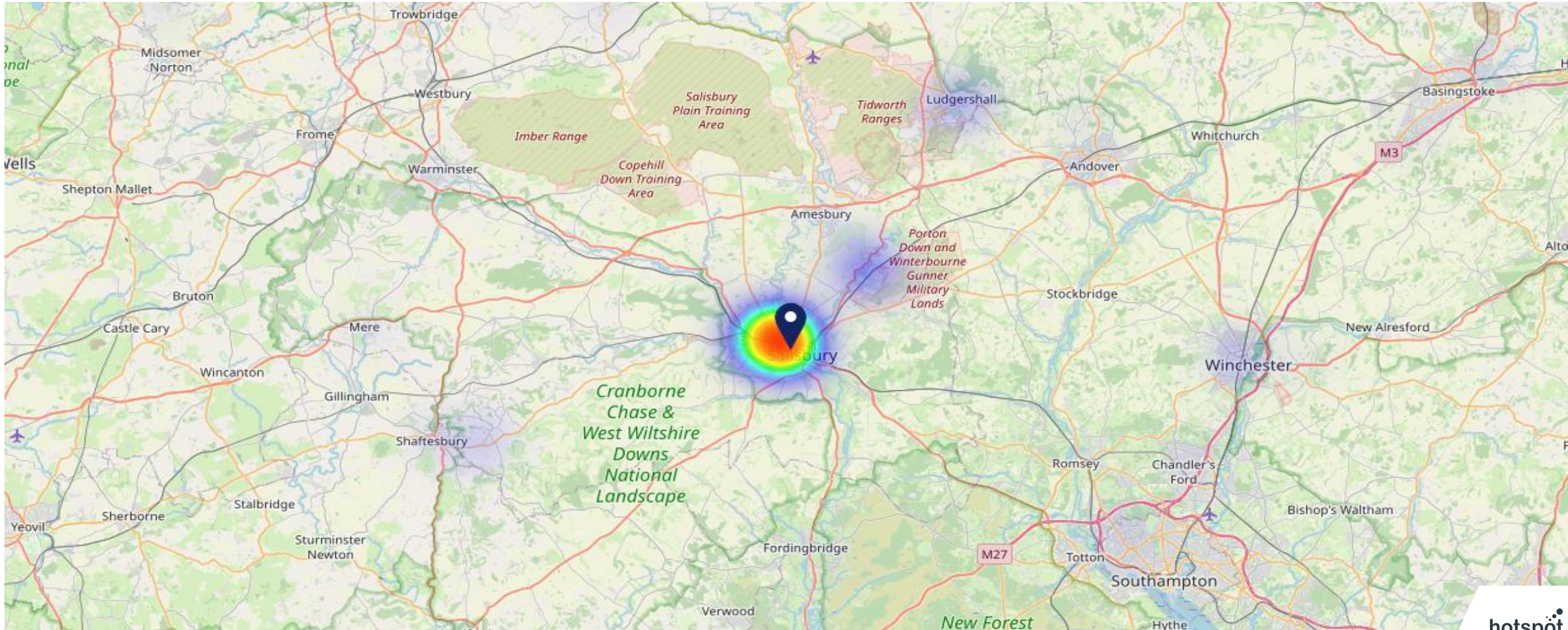




Map of Guest Origin

Where do customers of Horse & Groom SP27ES come from?

Where do customers of Horse & Groom SP27ES for 31/05/2023 - 22/05/2024 live

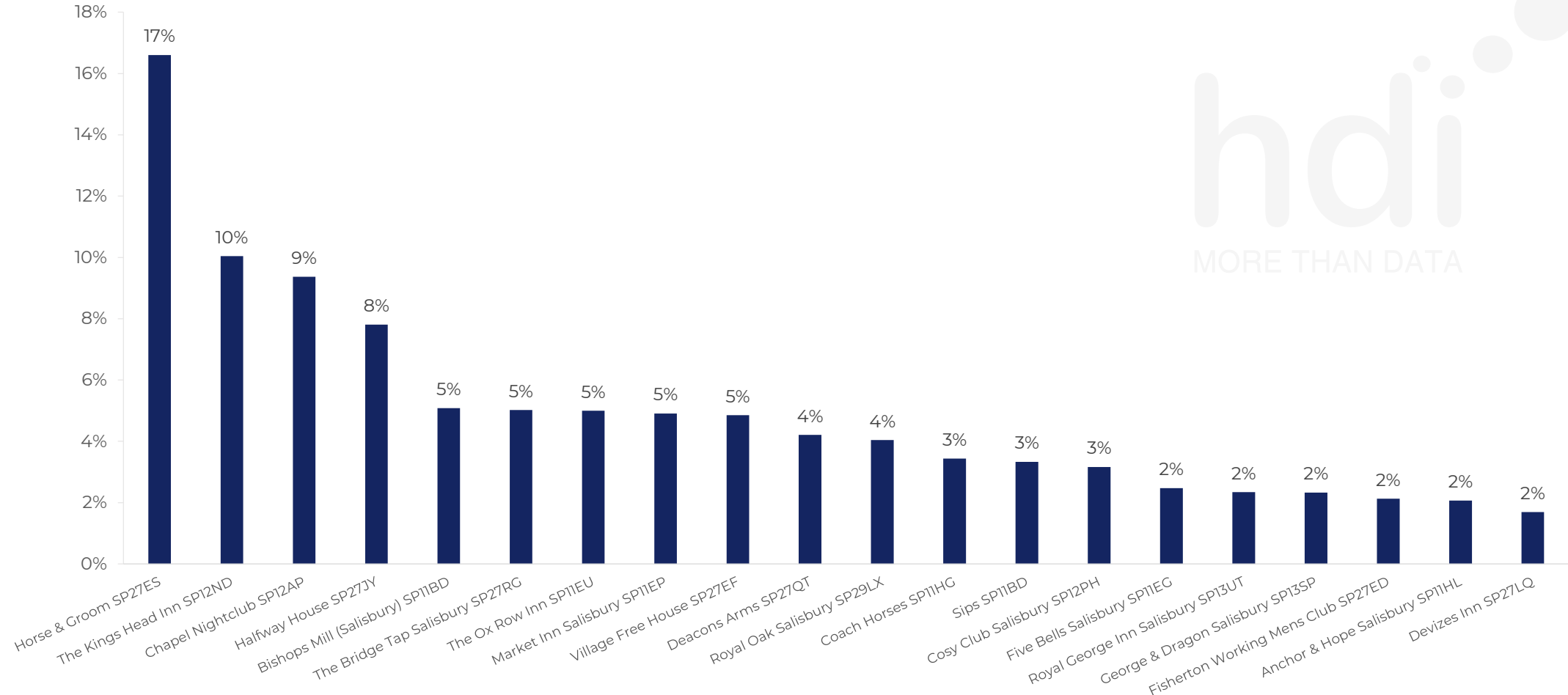




Share of Wallet

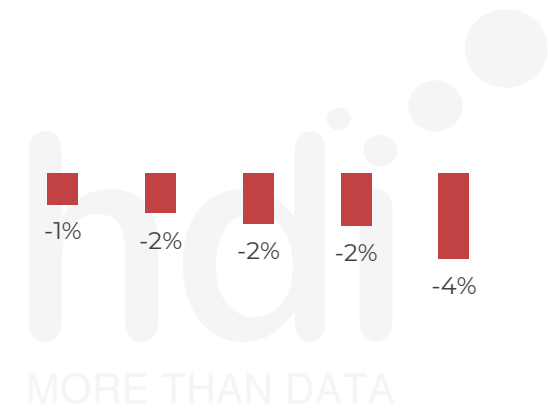
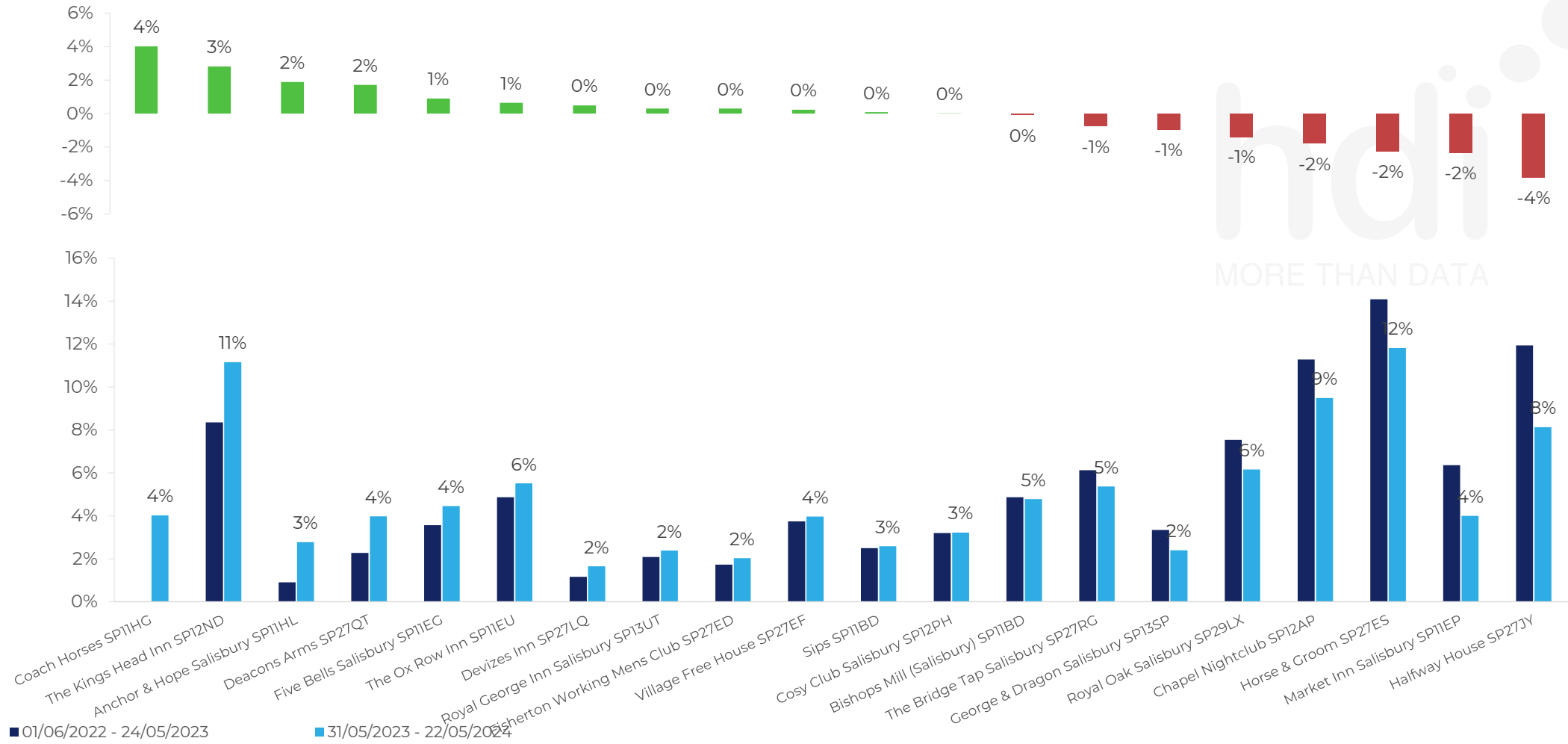
What are the Top 20 venues (by spend) that customers of Horse & Groom SP27ES also visit?

For customers of Horse & Groom SP27ES, who are the top 20 competitors from 97 Chains in 3 Miles for 31/05/2023 - 22/05/2024 split by Venue



Share of Wallet Change

How has share of wallet of customers of Horse & Groom SP27ES changed between two date ranges?





Market Summary

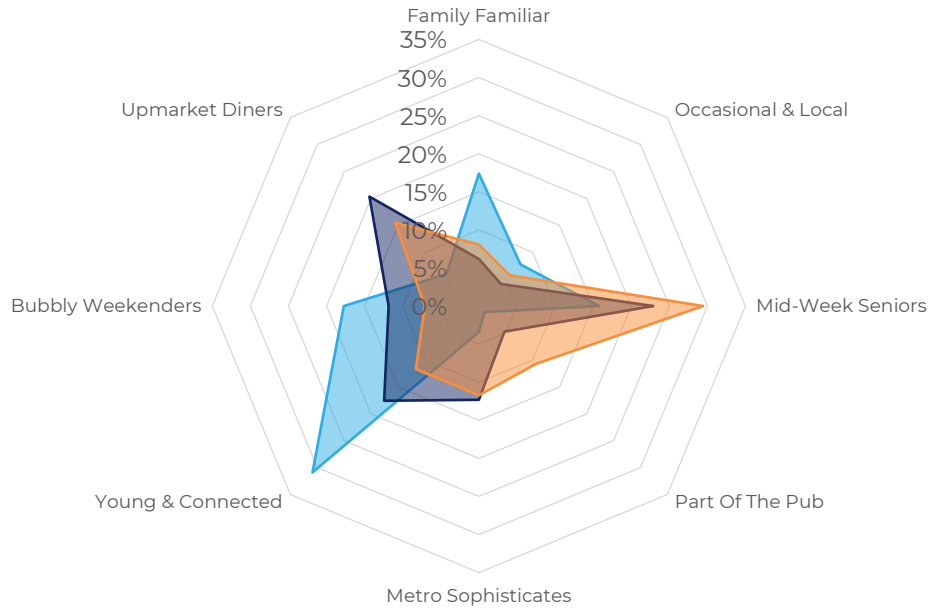
How does the local area for Horse & Groom SP27ES compare to the national average (1 = low, 10 = high)

| Data Type | Name | Spend in 250m | 250m Spend vs National | Spend in 500m | 500m Spend vs National | Spend in 1 mile | 1 mile Spend vs National | Spend in 3 miles | 3 mile Spend vs National |
|-----------|-----------------------------|---------------|------------------------|---------------|------------------------|-----------------|--------------------------|------------------|--------------------------|
| Total | Annual Sales | £290K | 3 | £1.02M | 3 | £52.25M | 8 | £73.33M | 6 |
| Weekpart | Mon - Thu | 32.3% | 2 | 32.2% | 1 | 39.6% | 4 | 40.8% | 4 |
| Weekpart | Fri - Sat | 30.7% | 1 | 46.0% | 7 | 46.8% | 9 | 44.3% | 8 |
| Weekpart | Sun | 37.1% | 10 | 21.8% | 10 | 13.6% | 3 | 14.8% | 3 |
| Age | 18 to 24 | 15.8% | 10 | 4.5% | 4 | 5.3% | 4 | 5.4% | 4 |
| Age | 25 to 34 | 16.0% | 3 | 11.6% | 1 | 14.9% | 2 | 14.3% | 1 |
| Age | 35 to 44 | 11.6% | 1 | 23.2% | 6 | 20.1% | 3 | 20.7% | 3 |
| Age | 45 to 54 | 21.8% | 7 | 30.6% | 10 | 21.6% | 7 | 21.2% | 7 |
| Age | 55 to 64 | 7.3% | 1 | 20.5% | 9 | 19.4% | 9 | 19.3% | 9 |
| Age | 65 to 74 | 10.6% | 8 | 4.8% | 4 | 12.4% | 9 | 12.3% | 10 |
| Age | 75+ | 17.0% | 10 | 4.9% | 9 | 6.2% | 9 | 6.8% | 10 |
| CAMEO | Business Elite | 2.4% | 2 | 1.9% | 2 | 5.1% | 4 | 4.9% | 4 |
| CAMEO | Prosperous Professionals | 2.7% | 2 | 4.7% | 4 | 9.1% | 8 | 9.2% | 9 |
| CAMEO | Flourishing Society | 5.8% | 2 | 7.2% | 3 | 16.0% | 7 | 16.4% | 7 |
| CAMEO | Content Communities | 12.2% | 5 | 23.1% | 10 | 19.6% | 10 | 19.6% | 10 |
| CAMEO | White Collar Neighbourhoods | 7.5% | 2 | 5.5% | 1 | 11.3% | 5 | 10.8% | 4 |
| CAMEO | Enterprising Mainstream | 6.8% | 5 | 5.9% | 4 | 7.4% | 5 | 7.5% | 5 |
| CAMEO | Paying The Mortgage | 20.4% | 9 | 36.9% | 10 | 14.3% | 5 | 14.4% | 5 |
| CAMEO | Cash Conscious Communities | 7.5% | 4 | 3.7% | 1 | 6.8% | 3 | 7.0% | 3 |
| CAMEO | On A Budget | 26.5% | 10 | 7.4% | 6 | 6.4% | 5 | 6.1% | 5 |
| CAMEO | Family Value | 8.3% | 9 | 3.7% | 6 | 3.9% | 7 | 4.1% | 6 |
| Affluence | AB | 10.9% | 2 | 13.8% | 2 | 30.2% | 6 | 30.5% | 6 |
| Affluence | C1C2 | 46.9% | 5 | 71.4% | 10 | 52.6% | 7 | 52.2% | 7 |
| Affluence | DE | 42.2% | 10 | 14.8% | 3 | 17.1% | 4 | 17.3% | 4 |



Local Market Profile

Mix of spend by customer segment in Punch site and local market



| | Customer Count | Family Familiar | Occasional & Local | Mid-Week Seniors | Part Of The Pub | Metro Sophisticates | Young & Connected | Bubbly Weekenders | Upmarket Diners |
|----------------------------------|----------------|-----------------|--------------------|------------------|-----------------|---------------------|-------------------|-------------------|-----------------|
| Horse & Groom | 46 | 17.41% | 7.71% | 15.80% | 1.09% | 3.38% | 30.87% | 17.72% | 5.98% |
| Local Catchment | 4910 | 6.19% | 4.09% | 22.88% | 4.73% | 12.28% | 17.58% | 11.86% | 20.35% |
| Punch T&L | 104833 | 8.08% | 5.73% | 29.44% | 10.69% | 11.71% | 11.72% | 7.10% | 15.49% |
| Horse & Groom vs Local Catchment | | 11.22% | 3.62% | -7.08% | -3.64% | -8.90% | 13.29% | 5.86% | -14.37% |
| Horse & Groom vs Punch T&L | | 9.33% | 1.98% | -13.64% | -9.60% | -8.33% | 19.15% | 10.62% | -9.51% |
| Local Catchment vs Punch T&L | | -1.89% | -1.64% | -6.56% | -5.96% | 0.57% | 5.86% | 4.76% | 4.86% |

■ Horse & Groom

■ Local Catchment

■ Punch T&L