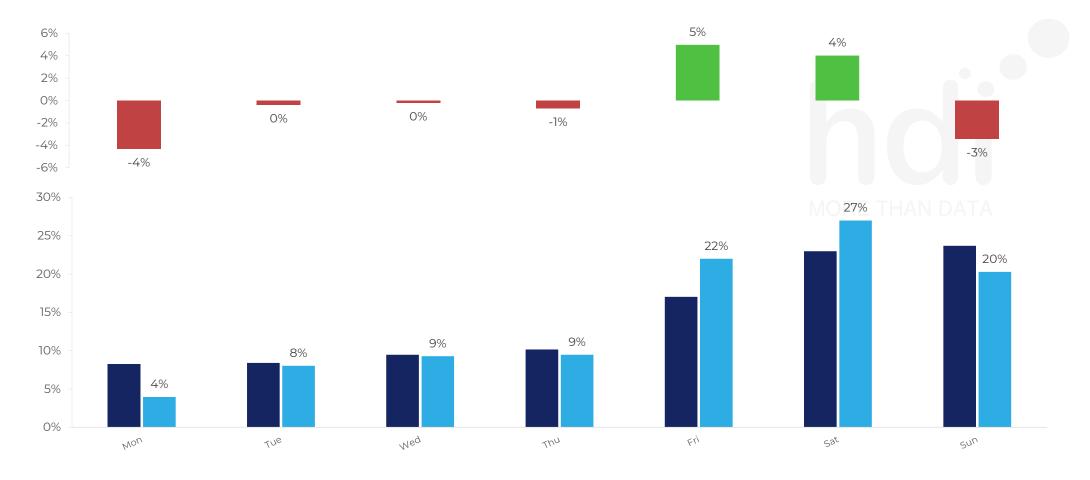




How is customer spend distributed throughout the week for Elephant NE630SZ versus its competitors?

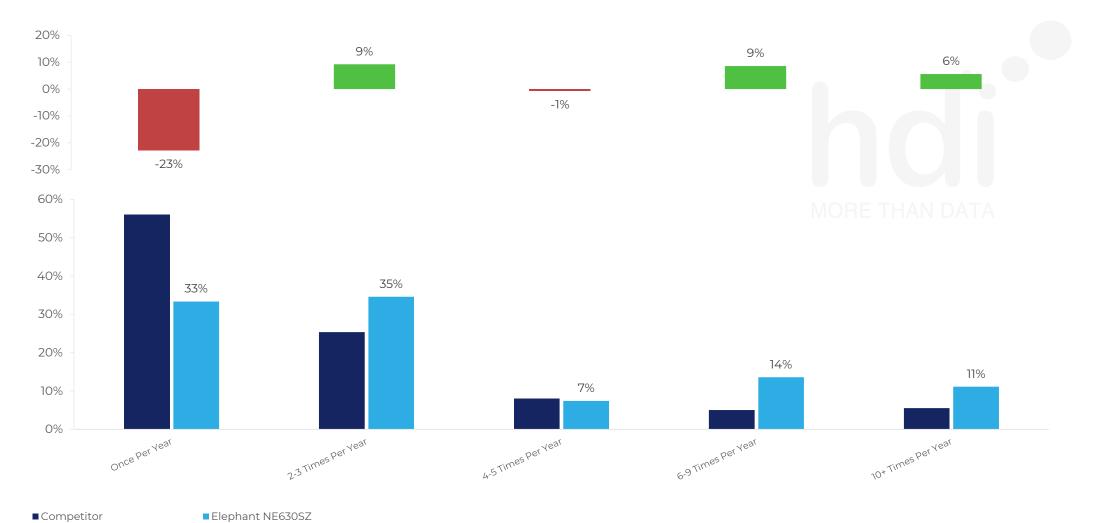
% of spend for Elephant NE630SZ and 97 Chains in 3 Miles from 12/04/2023 - 03/04/2024 split by Day of Week





■ Competitor ■ Elephant NE630SZ

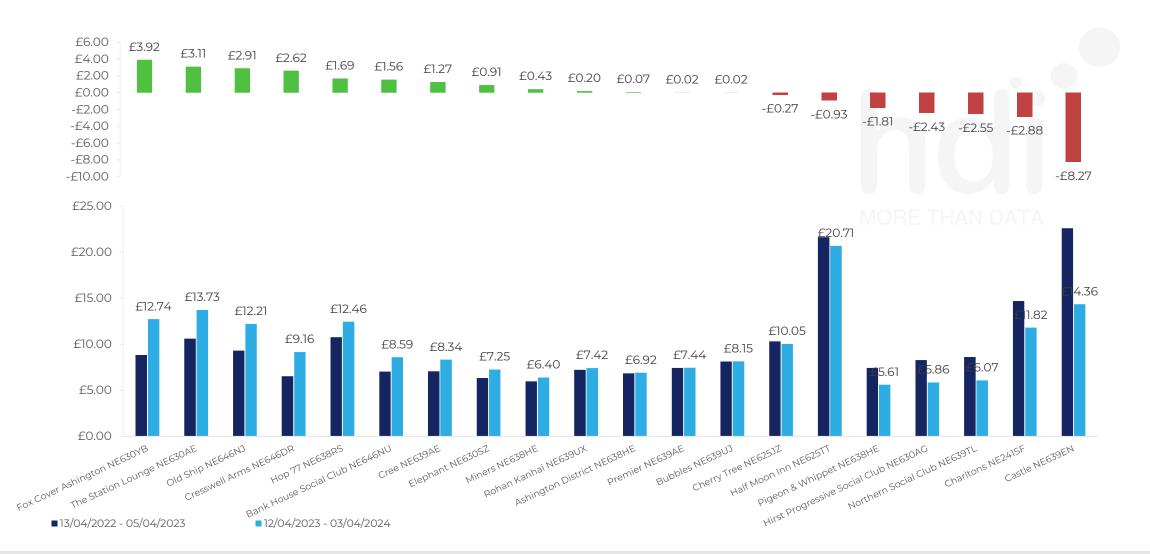
% of customer numbers for Elephant NE630SZ and 97 Chains in 3 Miles from 12/04/2023 - 03/04/2024 and the number of visits made Per Annum







#### How has ATV changed between two date ranges?



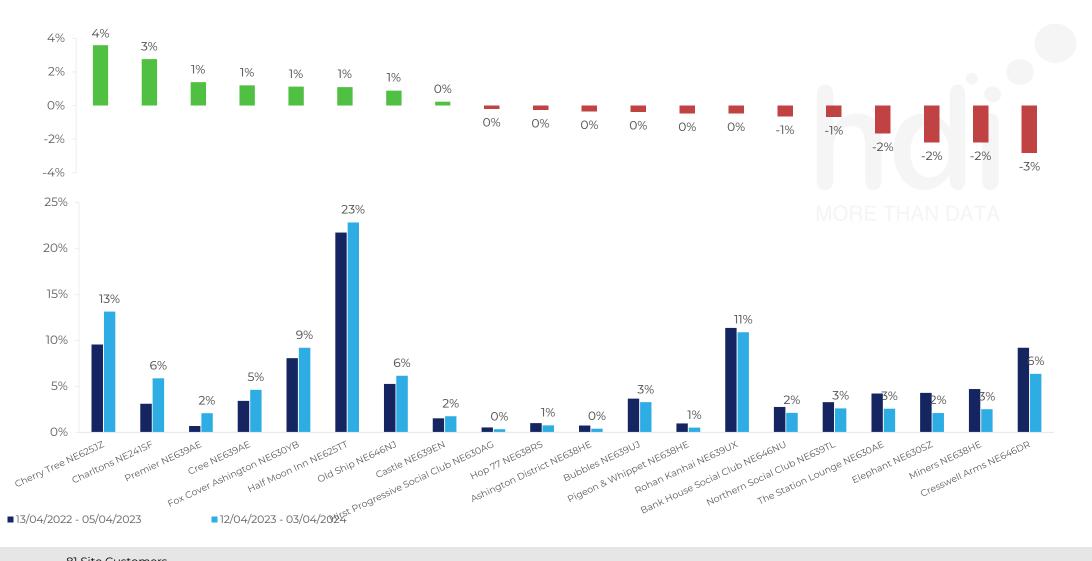




Market Share Change

How has market share changed between two date ranges?

% of market share spend for Elephant NE630SZ and 97 Chains in 3 Miles from 12/04/2023 - 03/04/2024



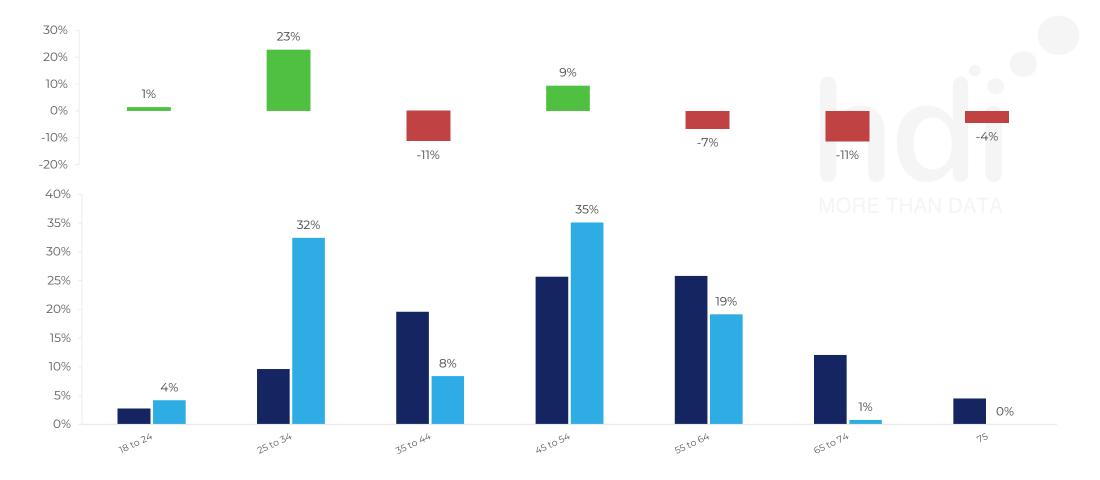






How does the age profile of customers who visit Elephant NE630SZ compare versus its competitors?

% of spend for Elephant NE630SZ and 97 Chains in 3 Miles from 12/04/2023 - 03/04/2024 split by Age Range



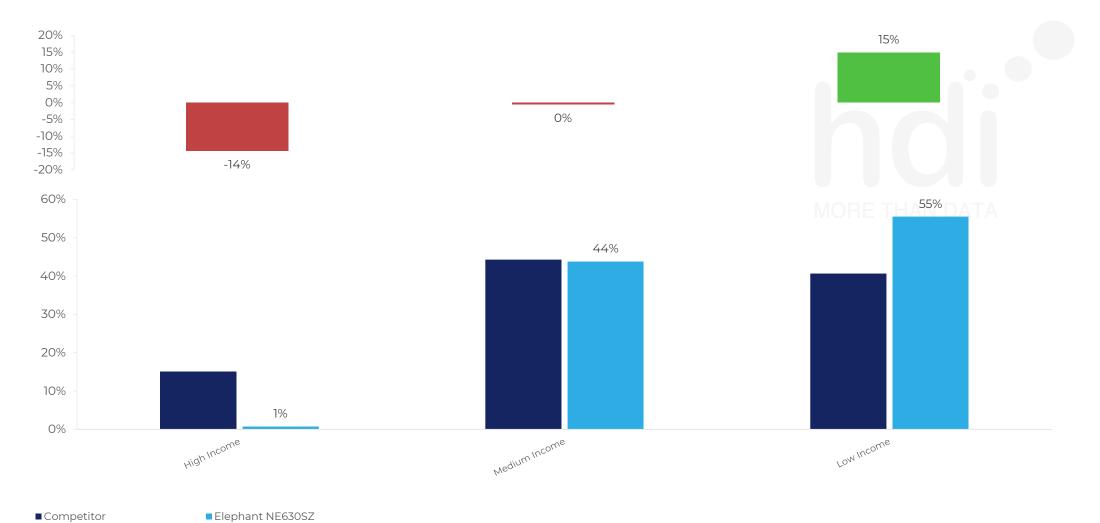


■ Competitor ■ Elephant NE630SZ



How does the affluence of customers who visit Elephant NE630SZ compare versus its competitors?

% of spend for Elephant NE630SZ and 97 Chains in 3 Miles from 12/04/2023 - 03/04/2024 split by Affluence





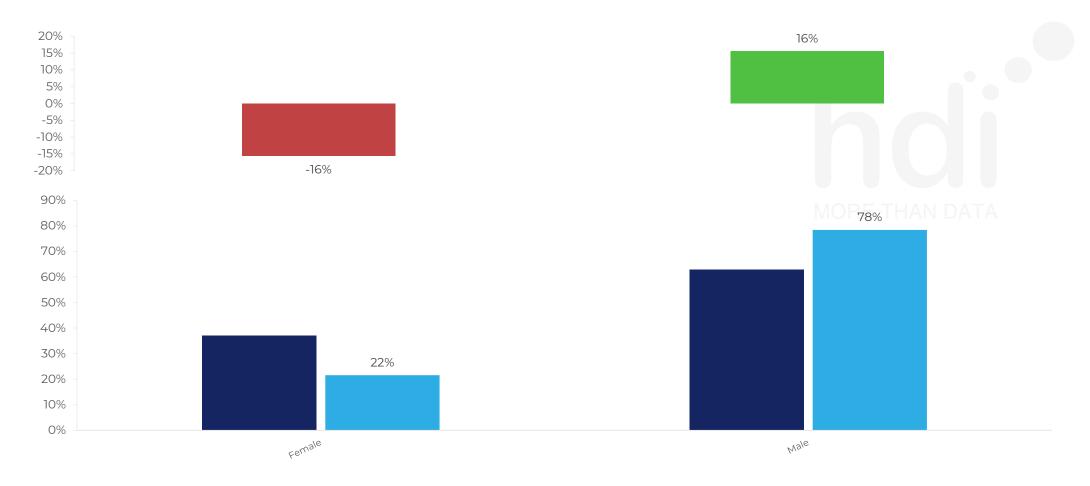
■ Competitor

■ Elephant NE630SZ



How does the gender profile of customers who visit Elephant NE630SZ compare versus its competitors?

% of spend for Elephant NE630SZ and 97 Chains in 3 Miles from 12/04/2023 - 03/04/2024 split by Gender





40 Site Customers 43 Competitors 2916 Competitor Customers

# **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.



#### 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.



#### 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.



## 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.



## 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
- 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.



# DINERS

#### 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
- o If eating, they've an interest in vegetarian / vegan dishes and have a preference for chicken burgers.



#### 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, brands such as Bud. Smirnoff and Jamesons.
- These customers are more likely to visit betting shops, off licences and watch live football.

# 8 - UPMARKET

- Upmarket Diners are affluent, older quests 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.

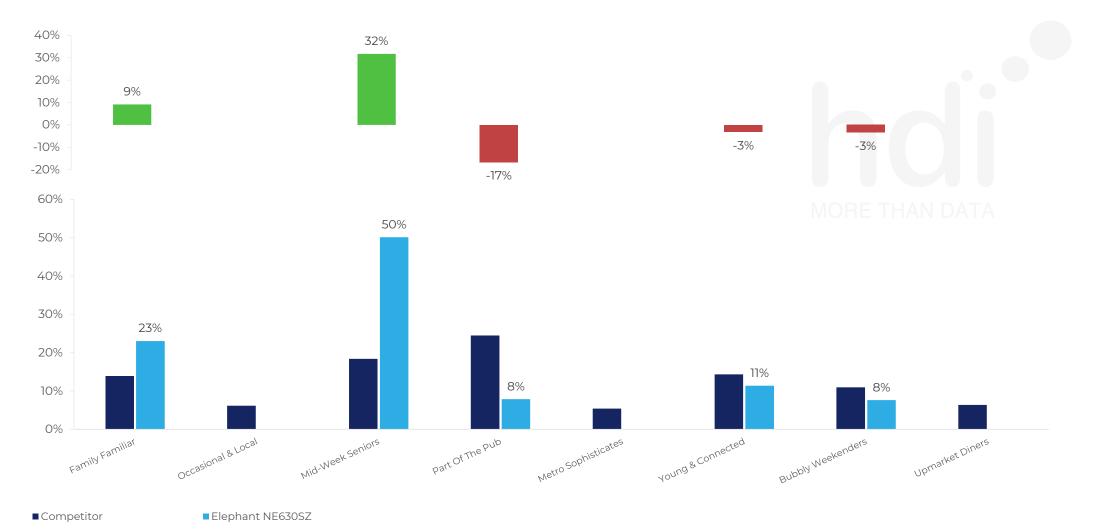




Punch Segmentation

How does the Custom segmentation profile of customers who visit Elephant NE630SZ compare versus its competitors?

% of spend for Elephant NE630SZ and 97 Chains in 3 Miles from 12/04/2023 - 03/04/2024 split by Segment







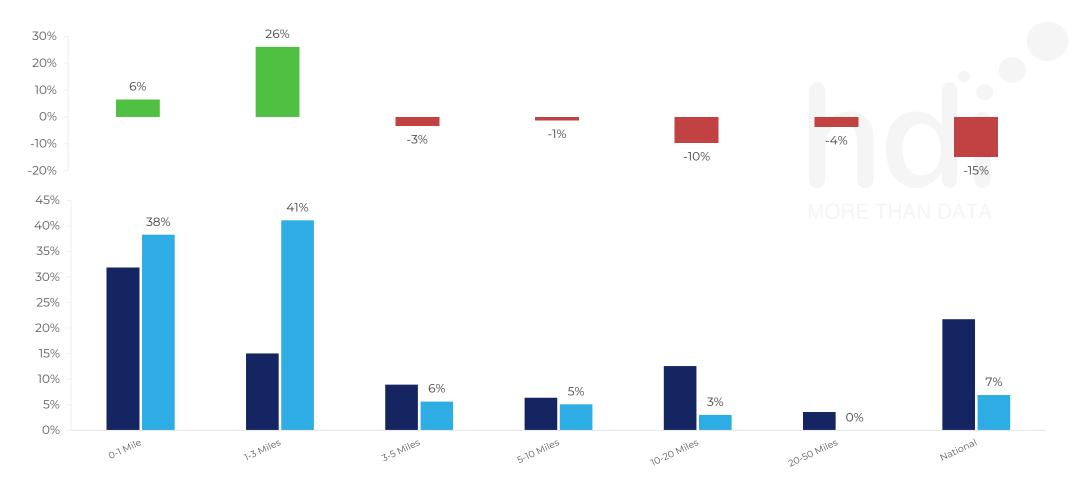
## Spend by Distance

■ Competitor

■ Elephant NE630SZ

How does the spend profile of Elephant NE630SZ compare versus its competitors based on travel distances?

% of spend for Elephant NE630SZ and 97 Chains in 3 Miles from 12/04/2023 - 03/04/2024 split by Distance travelled





39 Site Customers 43 Competitors 2832 Competitor Customers

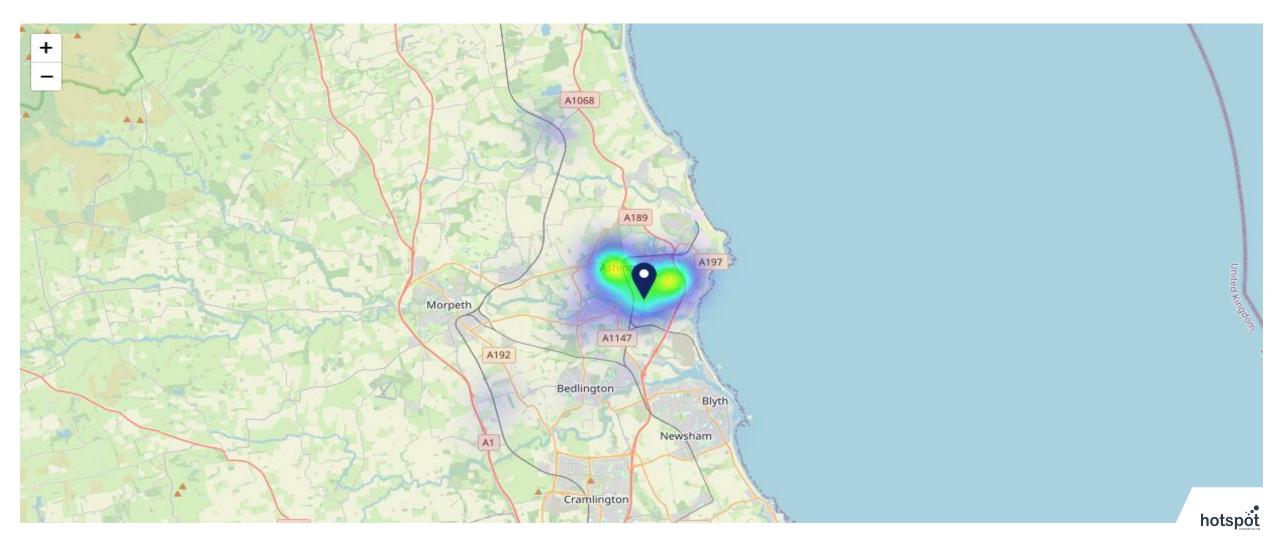




Map of Guest Origin

Where do customers of Elephant NE630SZ come from?

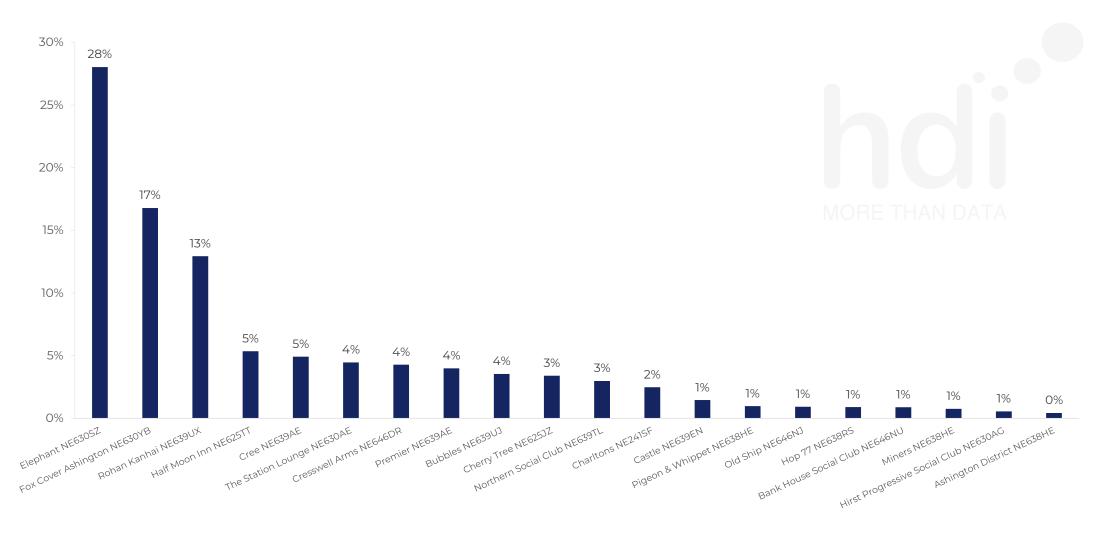
Where do customers of Elephant NE630SZ for 12/04/2023 - 03/04/2024 live



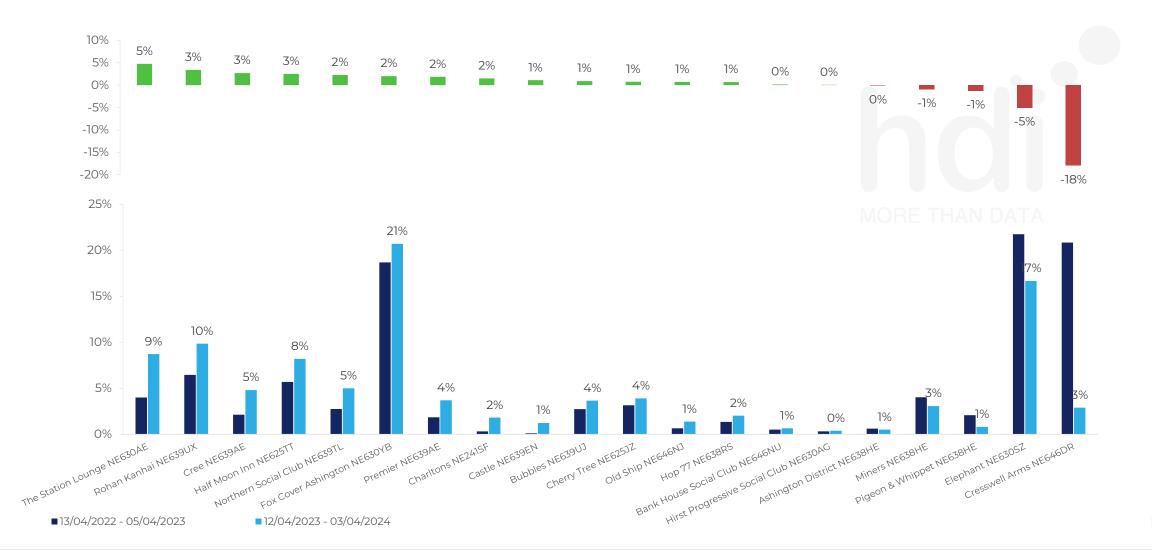


What are the Top 20 venues (by spend) that customers of Elephant NE630SZ also visit?

For customers of Elephant NE630SZ, who are the top 20 competitors from 97 Chains in 3 Miles for 12/04/2023 - 03/04/2024 split by Venue













How does the local area for Elephant NE630SZ 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	£261K	3	£261K	2	£2.68M	2	£12.90M	2
Weekpart	Mon - Thu	57.4%	10	57.4%	10	46.1%	9	47.4%	10
Weekpart	Fri - Sat	33.9%	1	33.9%	1	38.5%	2	36.2%	1
Weekpart	Sun	8.7%	1	8.7%	1	15.4%	6	16.5%	8
Age	18 to 24	21.3%	10	21.3%	10	6.2%	5	5.8%	4
Age	25 to 34	12.5%	2	12.5%	1	13.1%	1	14.5%	1
Age	35 to 44	20.6%	4	20.6%	3	23.7%	6	28.0%	10
Age	45 to 54	18.4%	4	18.4%	3	21.8%	8	22.4%	9
Age	55 to 64	22.2%	9	22.2%	9	24.0%	10	17.9%	8
Age	65 to 74	4.9%	4	4.9%	4	9.3%	8	9.0%	8
Age	75+	0.2%	1	0.2%	1	1.9%	4	2.4%	5
CAMEO	Business Elite	0.2%	1	0.2%	1	0.7%	1	1.6%	1
CAMEO	Prosperous Professionals	1.7%	2	1.7%	1	1.3%	1	2.2%	1
CAMEO	Flourishing Society	4.4%	2	4.4%	1	5.0%	1	5.8%	1
CAMEO	Content Communities	6.1%	1	6.1%	1	11.8%	5	9.4%	2
CAMEO	White Collar Neighbourhoods	3.7%	1	3.7%	1	5.5%	1	5.6%	1
CAMEO	Enterprising Mainstream	6.4%	4	6.4%	4	9.1%	6	8.5%	5
CAMEO	Paying The Mortgage	16.4%	7	16.4%	7	19.1%	9	18.8%	9
CAMEO	Cash Conscious Communities	12.2%	8	12.2%	8	16.1%	10	15.1%	10
CAMEO	On A Budget	11.8%	9	11.8%	9	8.9%	8	9.1%	8
CAMEO	Family Value	37.2%	10	37.2%	10	22.5%	10	24.0%	10
Affluence	AB	6.2%	1	6.2%	1	7.0%	1	9.6%	1
Affluence	C1C2	32.6%	1	32.6%	1	45.5%	4	42.3%	3
Affluence	DE	61.2%	10	61.2%	10	47.4%	10	48.1%	10

