

Winning in the On Premise in 2023

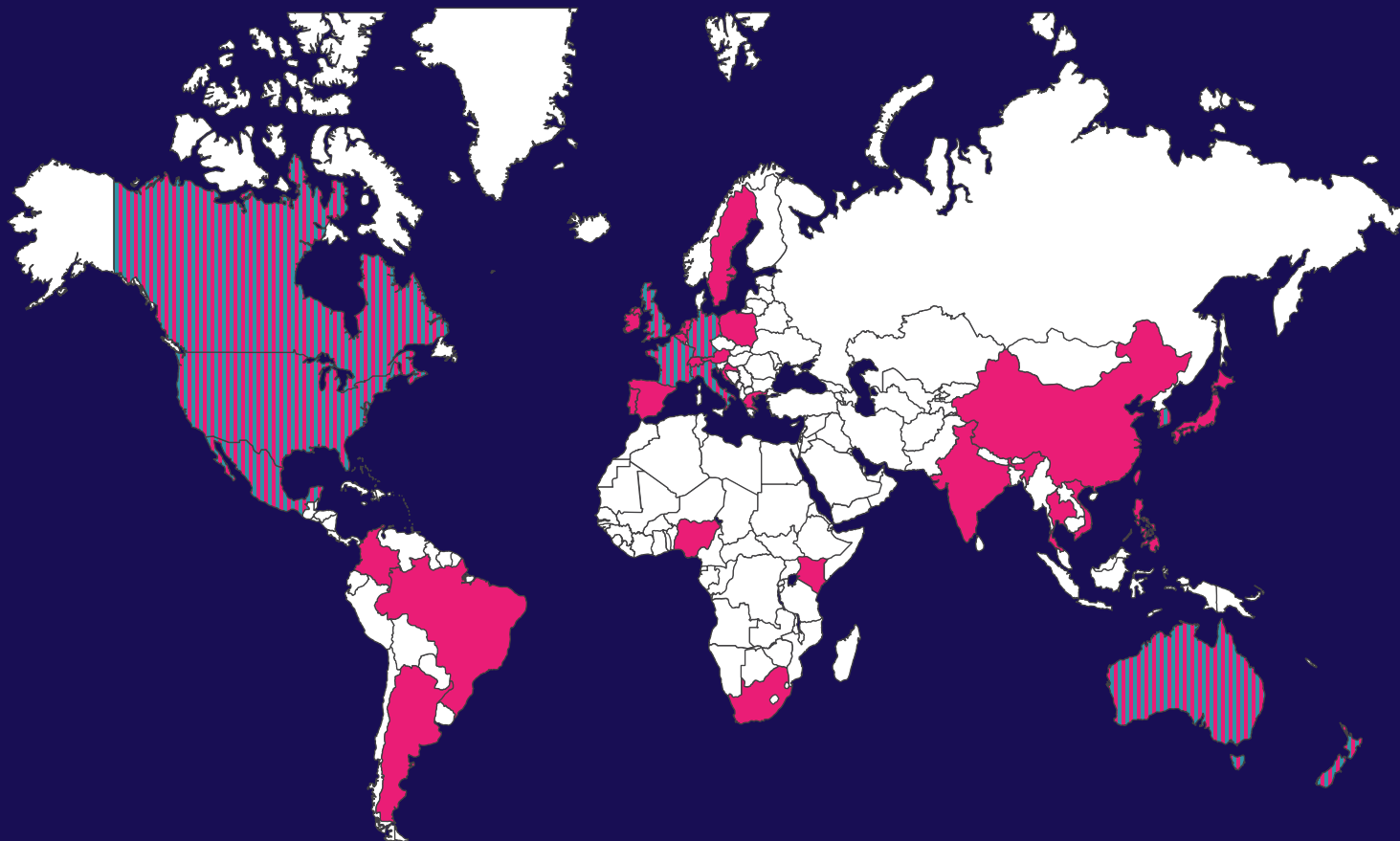
REACH Europe
CGA by NIQ



CGA by NIQ: REACH Europe

Global insight from 34 countries, 27,500 On Premise consumers and 525 operators

15-minute online survey with On Premise users, nationally representative of age, gender and region*



Consumer research conducted in:

- Argentina
- Australia
- Austria
- Belgium
- Brazil
- Canada
- China
- Colombia
- Croatia
- France
- GB
- Germany
- Greece
- India
- Ireland (ROI and NI)
- Italy
- Japan
- Kenya
- Mexico
- Netherlands
- New Zealand
- Nigeria
- Philippines
- Poland
- Portugal
- South Africa
- South Korea
- Spain
- Sweden
- Switzerland
- Taiwan
- Thailand
- US
- Vietnam

Operator research conducted in:

- Australia
- GB
- Canada
- France
- Germany
- Italy
- Mexico
- South Korea
- US

REACH Europe

Following CGA's annual Global REACH report, dedicated regional REACH reports are available which explore more closely the nuances of changing consumer behaviour by market dependent on global location.

REACH Europe delves into the behaviour and engagement of consumers visiting the On Premise across European markets, identifying trends and opportunities for success in the region.

The report will explore:

- **Why win in the On Premise**
 - The long-lasting opportunities within the a resilient sector
- **How cost of living is affecting European consumers**
 - Operators are facing challenges due to rising costs
 - Consumer resilience despite the rising cost of living and increasing visitation
- **Prominent premium opportunities**
 - A focus on value and high-quality products during financial hardship
- **How to win in the On Premise in 2023 and beyond**
 - Supporting customers for mutual benefits
 - Following trends to future-proof and exploit opportunities
 - Disrupt and influence the ever-changing path to purchase





With 3 in 5 stating they could not do without eating or drinking out, the importance sector is abundantly clear

Source: REACH Global Report
SAMPLE SLIDE
62%

I absolutely love eating/drinking out and would be lost without it **20%**

I enjoy eating/drinking out and would feel disappointed if I could no longer do it **42%**

I like eating/drinking out but could easily not do it **28%**

I could very easily stop eating/drinking out and it would have no impact on my life **10%**

83%

Of surveyed respondents typically visit the On Premise in a 3-month period

61%

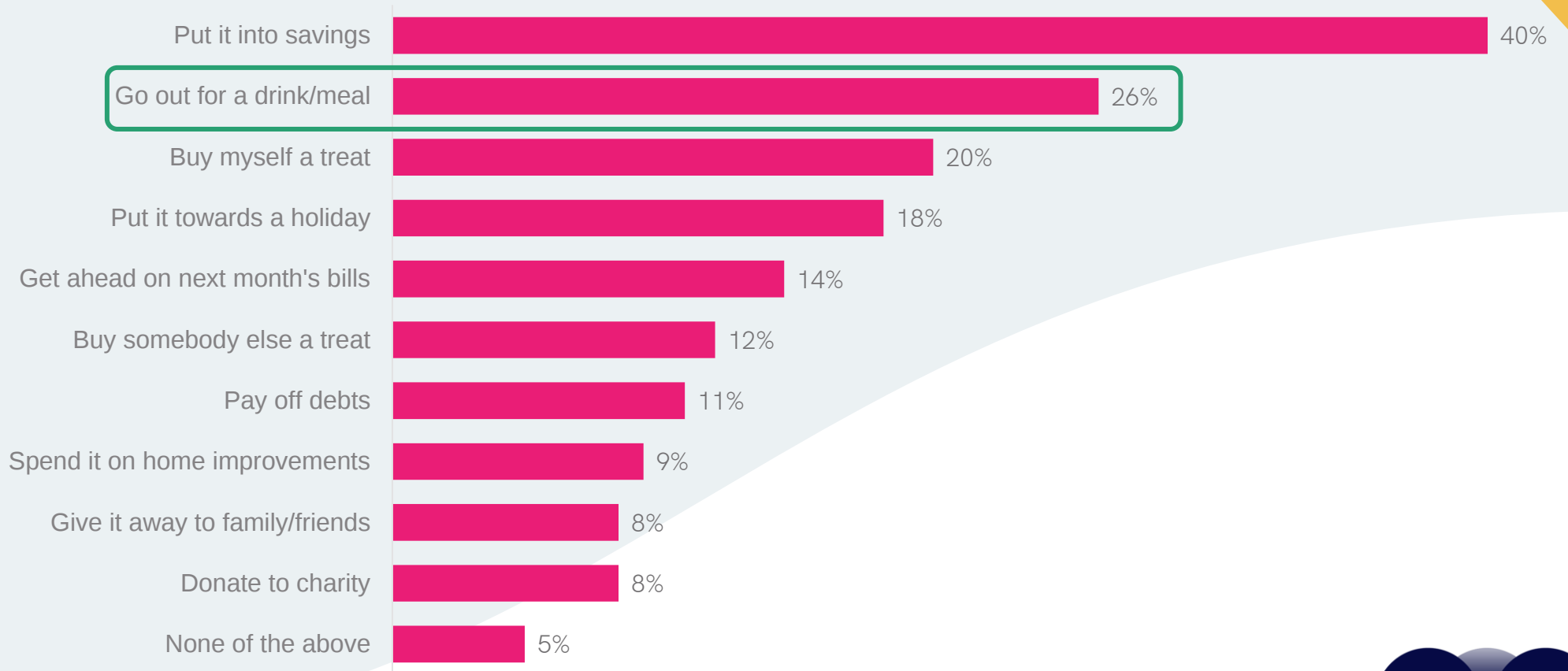
Of On Premise consumers typically visit weekly



Despite the impact of cost of living on household finances, the On Premise demonstrates its resilience as 1 in 4 consumers would still prioritise eating and drinking out

Source: REACH Global Report
SAMPLE SLIDE

What consumers would put a spare £50 (or currency equivalent) towards





65%

Of global consumers would prefer **high quality** drinks when drinking out

+11pp hardly impacted by CoL
-6pp severely impacted by CoL

35%

Of global consumers would prefer **cheap drinks** when drinking out

+6pp severely impacted by CoL
-11pp hardly impacted by CoL

SAMPLE SLIDE
Source: REACH Global Report



Why CGA by NIQ?

On Premise specialization

CGA's expertise in the On Premise sector is crucial for unlocking insights that truly make a difference. Generic insights are not valuable in this unique sector, and CGA's specialisation ensures the relevance and impact of the insights provided.

Comprehensive understanding of the market

CGA's REACH offers a specialist view of the On Premise market. By analysing consumer behaviour, category trends, venue types, brands, and occasions, it provides a comprehensive understanding to help inform strategies for success.

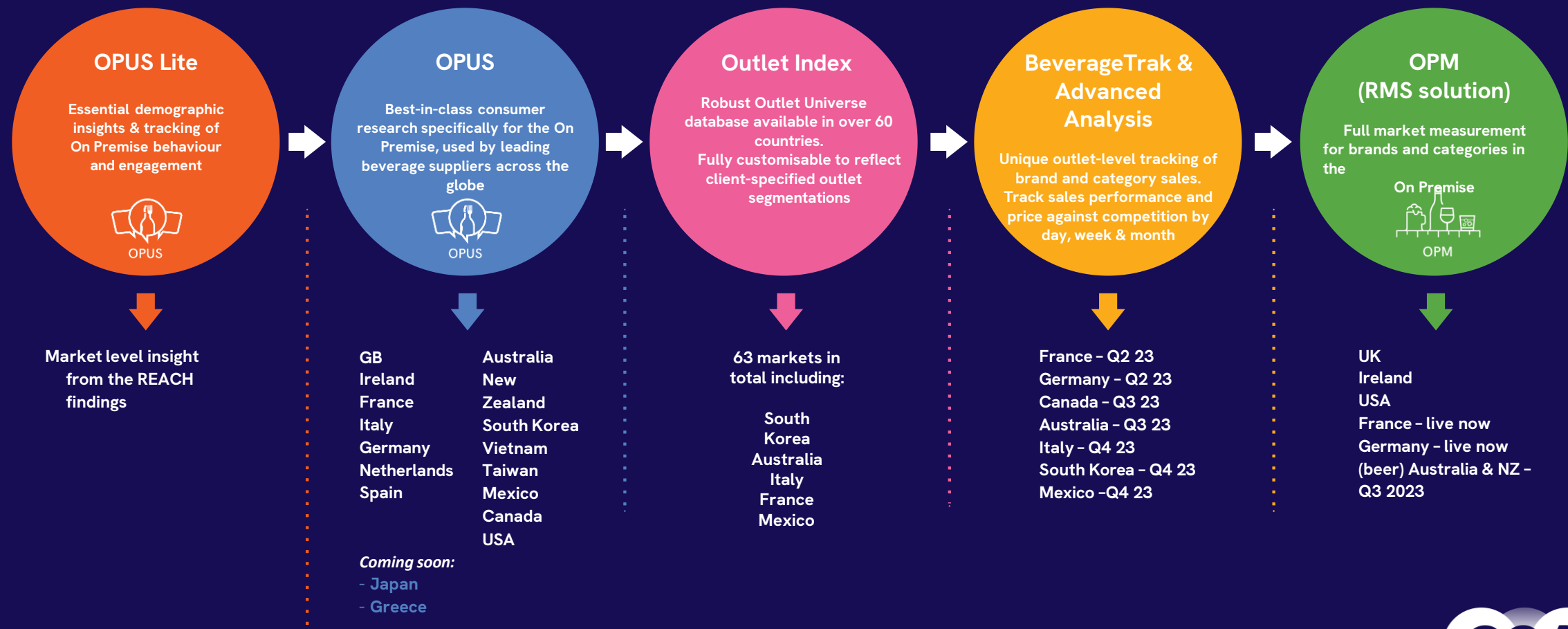
Built by On Premise experts

CGA's team consists of On Premise consumer research specialists who possess in-depth knowledge and understanding of the sector. They employ world-leading research techniques and leverage their expertise to deliver clear, actionable, and robust insights.



CGA by NIQ Service Availability Snapshot

All services currently live:



Learn more about CGA by NIQ's REACH Europe

Get in touch:



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