

Unlocking Potential: Driving Footfall in Canada's On Premise

Exploring On Premise sentiment, visit drivers, in-venue behaviours, and the biggest opportunities for growth.





Understanding Consumer expectations for Canada's On Premise

1

On Premise Sentiment

What motivates consumers to continue prioritising On Premise visits in 2025?

2

On Premise Occasions

How are consumer preferences for occasions evolving and what are factors that could encourage spontaneous visitation?

3

The Path to Purchase (OPUS preview)

What factors influence purchasing behavior at a venue, and how can we shape customer decisions before they arrive?

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It's clear that the On Premise holds a special place in the hearts of Canadian consumers. For suppliers and manufacturers, this isn't just a channel - it's a powerful engine for growth. The insights we've gathered reveal what drives people to go out, how they want to feel when they do, and what keeps them coming back. Brands that deliver memorable experiences here can earn not just loyalty, but valuable trial that extends into Off Premise sales. Understanding these motivators is key to winning in a competitive landscape.

Mitch Stefani

Director - On Premise



On Premise Sentiment

What consumers think of the
On Premise

On Premise sentiment – at a glance...

The On Premise plays a significant role in social life, special occasions and unique experiences that cannot be gained by other channels. The On Premise is the underpinning fabric of social life across Canada.

Unique experiences

- On Premise venues offer an atmosphere they cannot replicate at home demonstrating a strong affinity for the channel and unique, exciting experiences



Social Importance

- A high proportion of consumers agree that visiting bars and restaurants is one of the main highlights of their social life and supports social connections



Quality vs Atmosphere

- On Premise venue visits are seen as a special occasion or treat, with a high preference for quality food and drink



Price conscious consumers

- Considering economic pressures, there is a consciousness of price and consumers are seeking promotions, discounts and special deals



The On Premise offers an experience that **can't be replicated at home**

Ask to all

Strongly agree/agree

65%

Bars, restaurants or similar venues offers an **atmosphere that I can't replicate at home**

11%

61%

Bars, restaurants or similar venues **play an important role** in how I **celebrate special moments**

17%

54%

I visit bars, restaurants or similar venues **regularly to socialize**

24%

54%

I feel a **strong connection to my favourite bars/restaurants**

17%

51%

Visiting bars, restaurants or similar venues is one of the **highlights of my social life**

23%

40%

I am planning on **prioritizing visits** to bars, restaurants or similar venues **more this year**

27%

Strongly disagree/disagree

Source: CGA by NIQ April 2025 Canada on premise pulse report sample (1200)

Consumers' experience in the On Premise continues to be positive as they view their overall experience **better than a year ago**

22%

+15pp for 19-34

Better than a year ago

71%

The same as a year ago

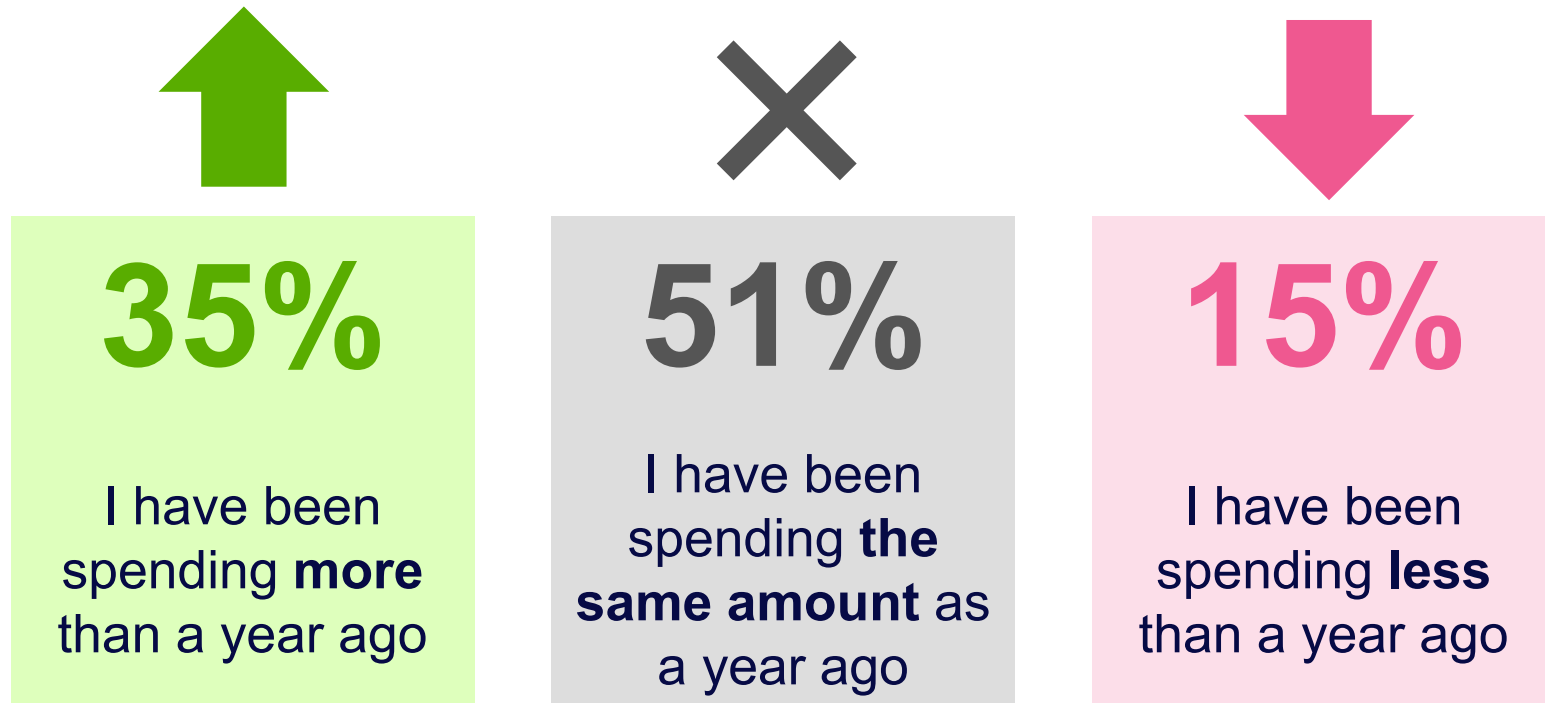
7%

Worse than a year ago

Source: CGA By NIQ November 2024 Canada On Premise Pulse Report Sample (311 -1200)

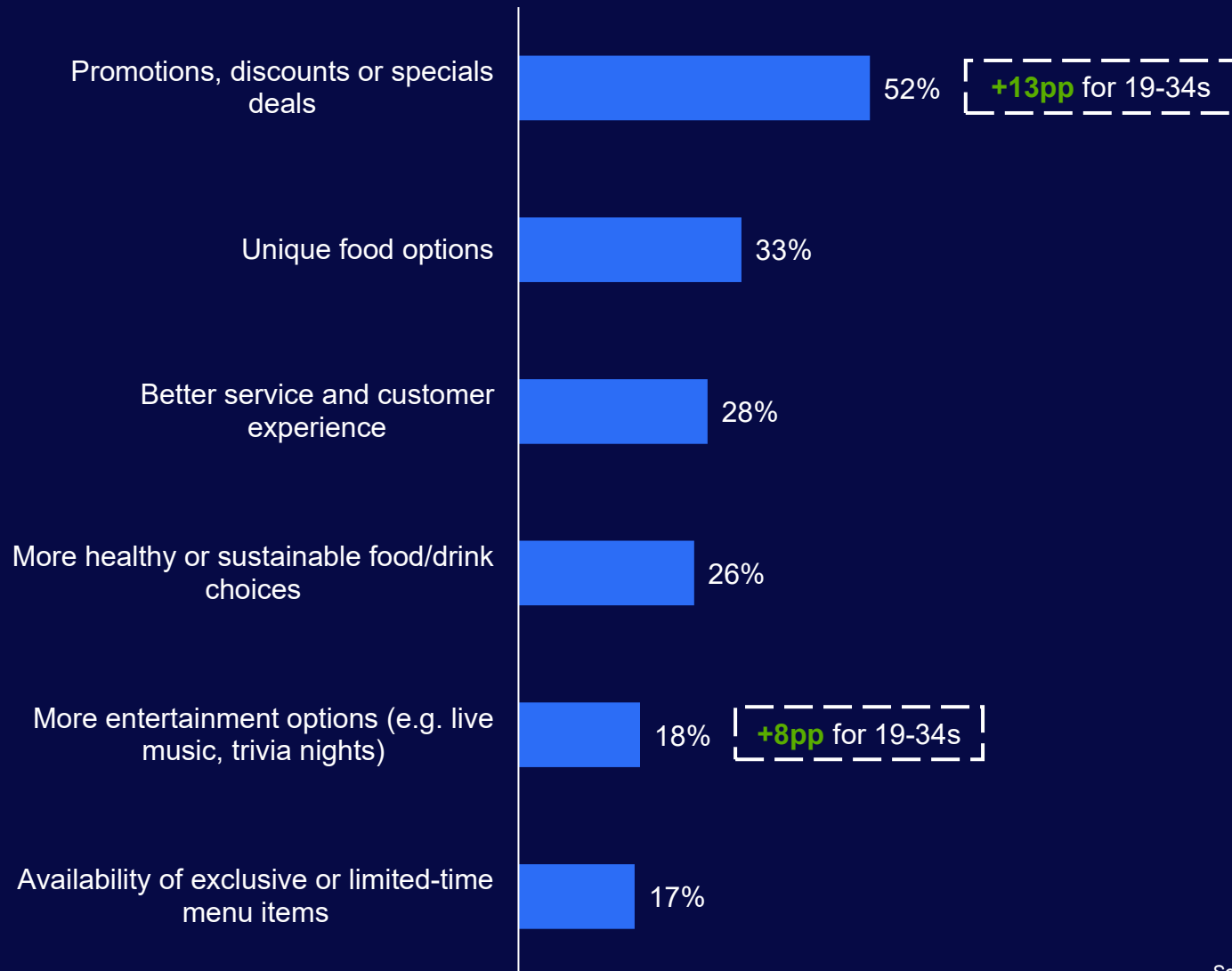
Half of consumers are **maintaining their usual spending** in the On Premise, almost **two in 5 have increased**, and only a **small proportion are spending less**

Asked to those visiting in the past month



Source: CGA by NIQ April 2025 Canada On Premise Pulse Report sample (1106)

What do you want to see more of when visiting bars, restaurants and other similar venues this year?



Whilst half of consumers are spending the same as a year ago, price does remain a top priority and many want to see more promotions, discounts or special deals in bars and restaurants, especially in younger consumers.

Guests want to see more unique offerings, entertainment options, and whatever the occasion, they want to be sure they will get consistently good experiences.

Source: CGA by NIQ April 2025 Canada on premise pulse report sample (310 - 1200)

On Premise Occasions

What factors drive consumers to visit?

On Premise occasions – at a glance...

The On Premise offers a one-of-a-kind, irreplaceable atmosphere - an essential backdrop for Canadians' social gatherings, whether spontaneous or pre-planned.

Visitation drivers

- Eating occasions continue to lead On Premise visitation, with consumers generally reporting more frequent dining than drinking visits. This highlights the importance of food-led experiences.



Influencing factors

- Special offers, drink deals, and live music are key motivators for unplanned visits, especially among younger consumers seeking value and entertainment.



Planned vs spontaneous

- Visits are driven by a mix of spontaneous and planned occasions. Casual meals and relaxed drinks tend to be unplanned, while formal meals, special occasions, and high-tempo drinks are more often pre-arranged.

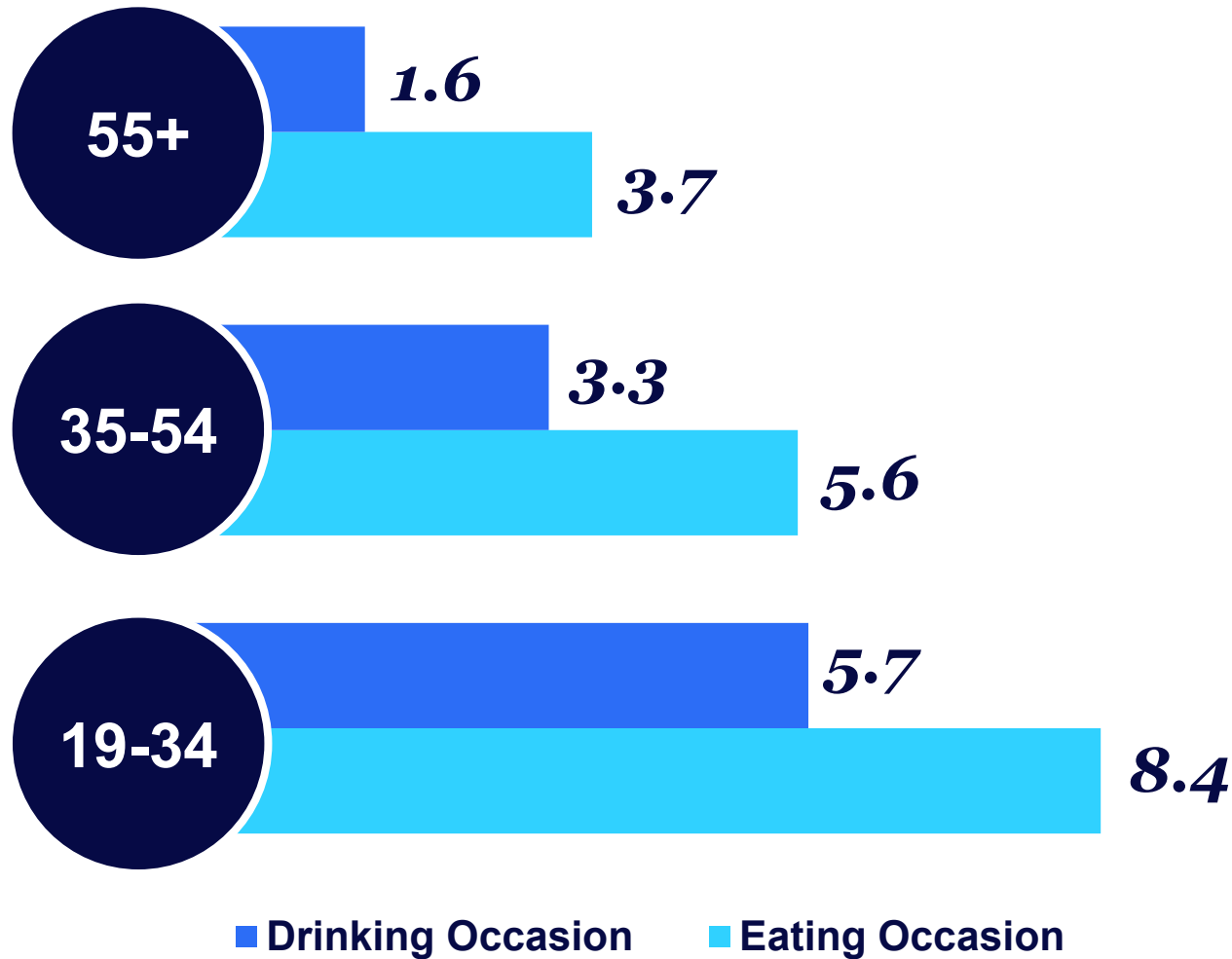


Youth engagement

- Younger age groups consistently visit more often than older ones, highlighting their role in shaping On Premise trends through both casual and event-driven outings.

Eating occasions continue to **drive overall visitation trends**, with younger consumers showing higher engagement in both dining and drinking

Average number of eating / drinking out occasions each month by age



On average, consumers report visiting the On Premise for **more eating occasions per month** than for drinking occasions.

Younger consumers consistently demonstrate higher visitation rates across both activities compared to older age groups.

Source: CGA by NIQ OPUS Canada (Spring 2025) – Sample Size: 1965 - 3001

Visitation is generally driven by a mix of casual, spontaneous outings - which are more common - and planned, event-driven visits, which tend to be more deliberate but occur less frequently each month

*Asked to those who have visited the On Premise in the past month**

71%

of consumers

**have visited for
casual, unplanned visits**
(e.g. everyday drinks, after work drinks)

42%

of consumers

**have visited for
event driven, planned visits**
(e.g. special occasion, to watch a sporting event etc.)

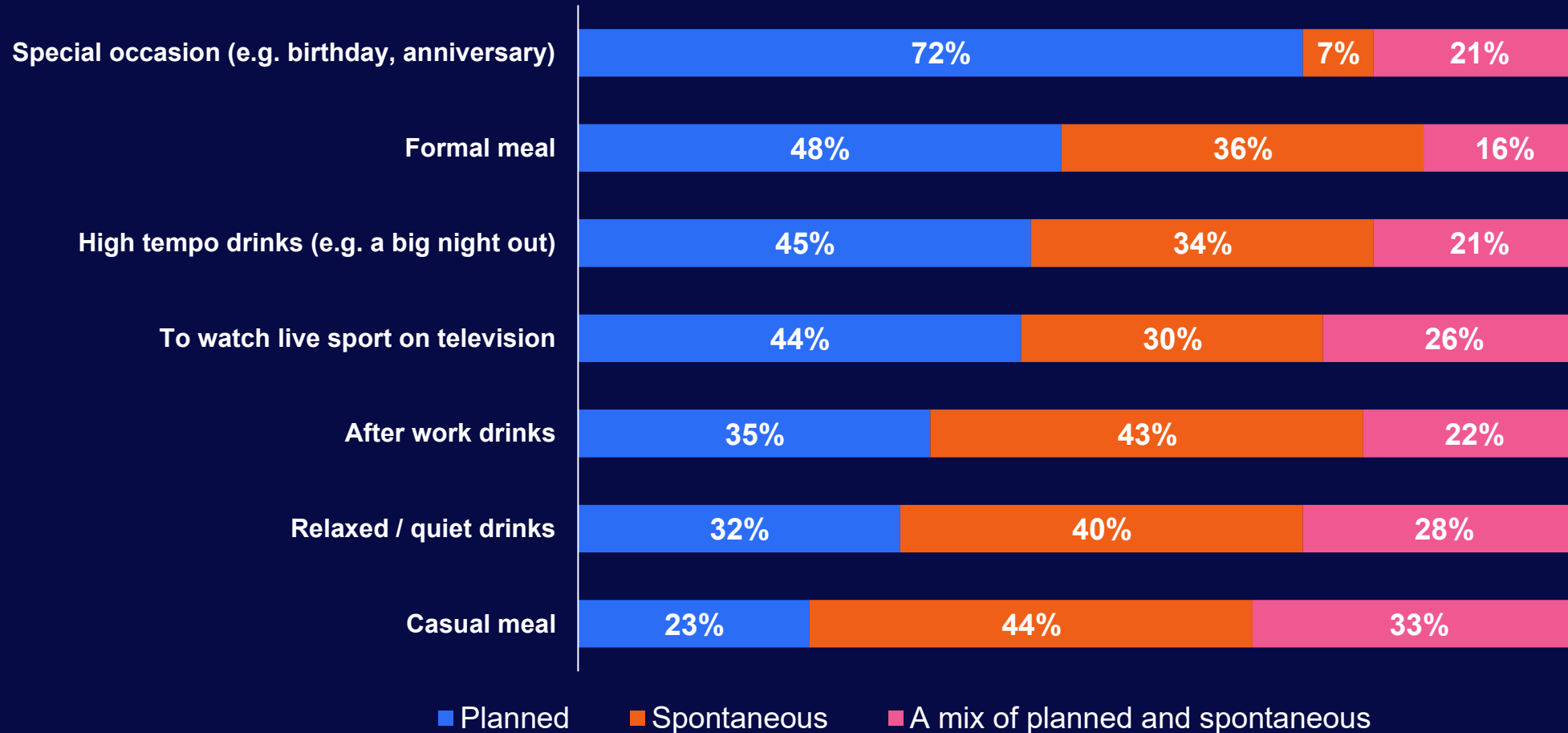
+8pp for 19-34s

Source: CGA by NIQ April 2025 Canada On Premise Pulse Report sample (275 - 1106)

* April 2025

Special occasions, formal meals, and high tempo drinks are more likely to be **pre-planned visits**, while casual meals, relaxed/quiet drinks, and after work drinks are more likely to be **spontaneous trips**

Asked to consumers visiting the On Premise for each occasion



Source: CGA by NIQ April 2025 Canada on premise pulse report sample (128 - 1179)

Special offers, drink deals, and live music are among the top reasons consumers who hadn't planned to go out say would encourage visitation

Food special	Special offers/ discount on food	Special offers/ discount on drinks	Drinks special	Live music
39%	37%	25%	25%	24%

New menu items or seasonal offerings	Special holiday or themed events	To watch sporting events	Advertised happy hour	Game nights (trivia etc.)
21%	20%	19%	19%	13%

While many consumers tend to plan their visits to the On Premise in advance, there remains a valuable opportunity to engage more spontaneous visitors.

To attract this audience and increase foot traffic, food-centric promotions - such as **limited-time specials** or **discounts on meals** - are most likely to encourage visitation.

*Significant over-indexes for 19-34s

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"The On Premise continues to stand out as a unique and irreplaceable setting where people come together to connect, celebrate, and unwind. In a time when value matters more than ever, consumers are seeking not just affordability, but memorable, high-quality experiences they can count on - whether planned or spontaneous.

From meals with loved ones to casual drinks with friends, the On Premise delivers moments that matter, supported by a growing desire for variety, sustainability, and engaging offers that enhance every visit."

Mitch Stefani

Director - On Premise



OPUS spotlight

Path to Purchase

Path to Purchase – at a glance...

From digital discovery to in-venue spontaneity, drink choices in the On Premise are shaped by a blend of pre-visit planning and real-time influence.

Drink decisions

- While many consumers arrive with a drink category in mind, a significant portion remain open to making their final choice in-venue - highlighting the opportunity to influence decisions at the point of purchase.



In-venue flexibility

- Drink choices are often fluid. Some consumers change their minds after arriving, showing that in-venue factors like menus, staff recommendations, and ambiance can sway final decisions.

Digital influence

- Online presence plays a key role in shaping both visitation and drink choices. Consumers frequently check social media for inspiration, browse venue accounts, and review drink menus before deciding where to go.

Social discovery

- Social media is a discovery tool - many consumers look to friends' posts and venue content to find new places and experiences, making digital engagement a powerful driver of footfall and choice.

Drink decisions can occur both **pre-visit** and **inside the venue**

REPORT
PREVIEW
OPUS Path to Purchase

38%

of consumers

decided on **all** of the drink categories they would have **before entering the venue**

28%

of consumers

decided on **some** drink categories they would have **before entering & some in the venue**

+10pp for 19-34

35%

of consumers

did not decide on any of the drink categories they would have **until entering the venue**

Source: CGA by NIQ OPUS Canada (Spring 2025) – Sample Size: 1859 - 7090

Although many consumers enter a venue with an idea of the category they intend to order from, there's still an opportunity to **influence their decision** once they are in-venue

75%

of consumers **know which drink category they will order before entering a venue**



24%

of consumers end up **choosing a different drink from the one they decided before visiting**

Source: CGA by NIQ OPUS Canada Spring 2025, Sample: 545

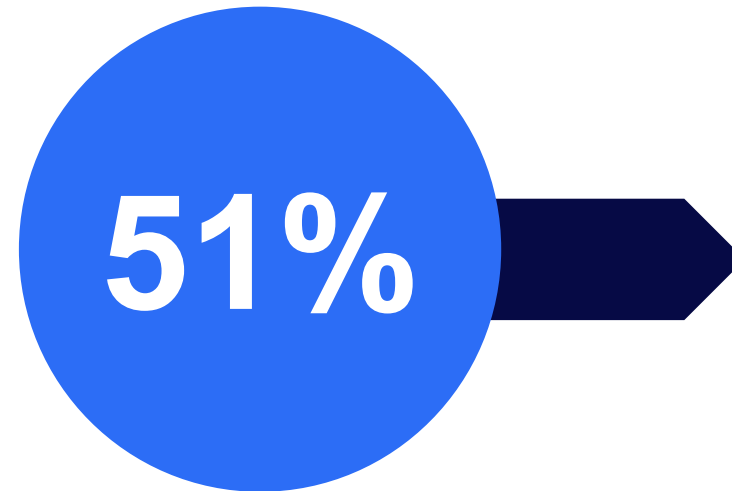
Source: CGA by NIQ OPUS Canada (Spring 2025) – Sample Size: 1965 - 7503

Online presence also has a major influence on visitation and drink choice before visiting

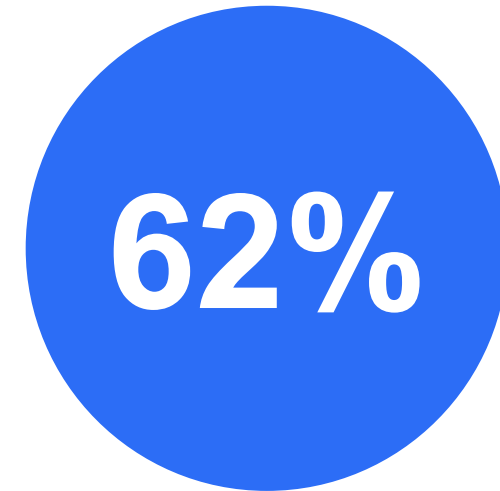
Consumers use **social media** to seek out recommendations and find new experiences

34%

Of consumers say they often look through **friends' social media** to get ideas of **where to go** to eat or drink



Of consumers check **venues social media accounts** before visiting



Of consumers check **venues drink menus** before visiting

Source: CGA Global REACH Canada April - May 2024. Sample: 71 – 253
Source: CGA by NIQ OPUS Canada Spring 2024, Sample: 820 - 7500

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"While many consumers arrive with a drink category in mind, the moment they step into a venue opens the door to influence. Whether it's the allure of trying something new, the appeal of a timely offer, or the subtle nudge of a well-planned social media strategy, decisions are still in flux. For some, habit rules; for others, price tips the scale. But across the board, visibility - both digital and physical - plays a pivotal role in shaping what ends up in the glass.

To truly capture attention and convert intention into purchase, brands and venues must be present, persuasive, and ready to inspire - before, during, and beyond the visit.

Mitch Stefani

Director - On Premise

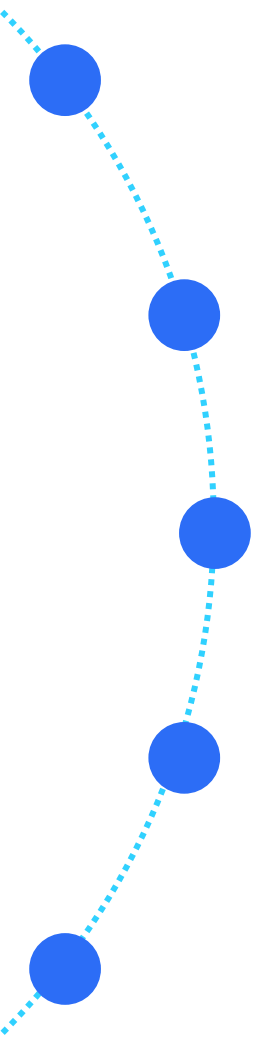


Want to know more about the Path to Purchase Report?

Get in touch for the full OPUS Spring Path to Purchase report

Get in touch





Get actionable consumer intelligence with precise insights and create revenue-boosting strategies.

Become On Premise category champion by understanding shifting consumer preferences.

Use tailored market representation so you can unlock untapped revenue opportunities.

Optimize your category and shape drink choices, attract consumers, and increase their satisfaction.

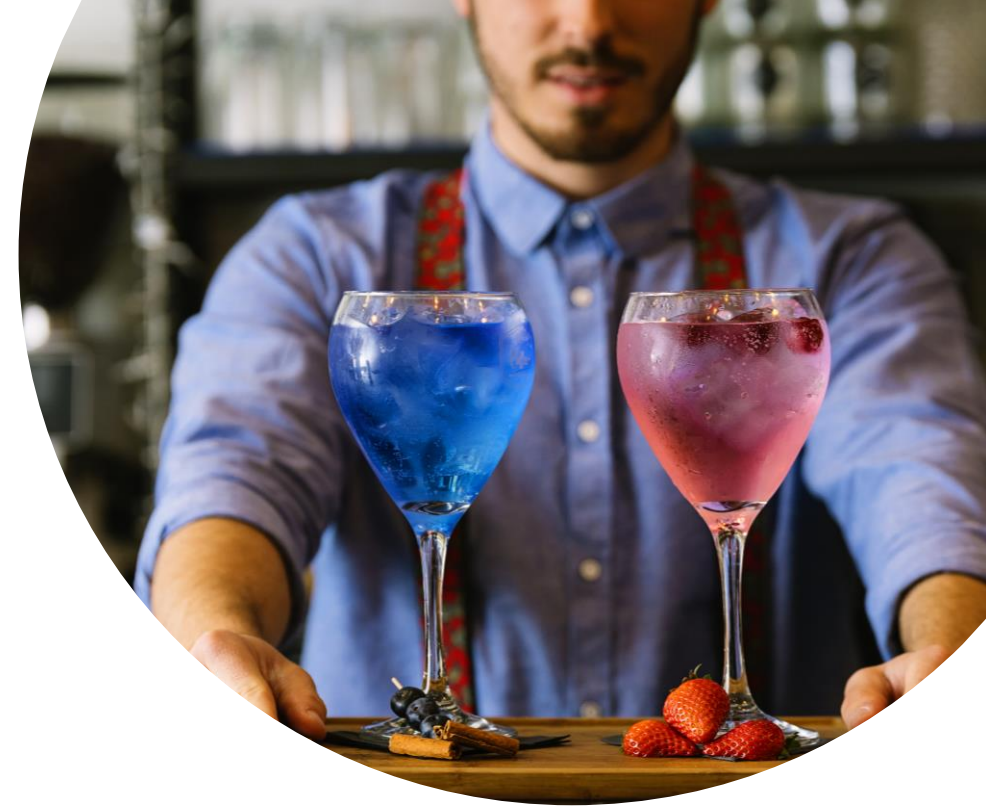
Justify stocking decisions by proving market demand with real insights and gain a competitive edge

How, When, Where and Why?

*Explore the full On Premise
consumer experience and
behaviors*

A Flexible Path for On Premise Success!

Depending on where you are in your On Premise journey, you can start with a simple category overview and scale as you grow. Or go in-depth from the start and find ways to refine your strategies.



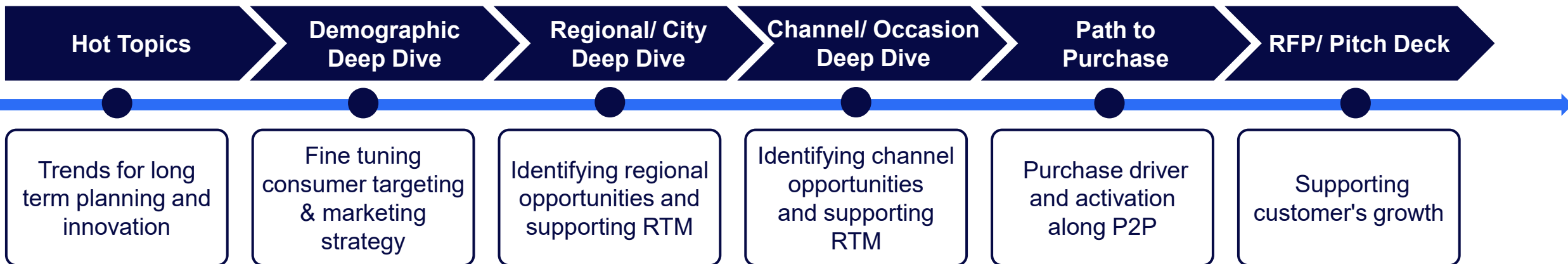
Your On Premise Journey



Go beyond growth! *Learn to anticipate trends and create innovative strategies by using consumer deep dives*



Your On Premise Journey



Additional Capabilities: Consumer Solutions



Custom RFP Support Decks

Take banner-specific sales stories to national account customers to give insights on not just your product but the market at large. Profile and compare your brand's consumers with their guests to discover synergies



Consumer Segmentation

Enabling clients to more strategically and effectively target drinkers with messaging and offerings that relate to them, ensuring \$ are spent more effectively in On Premise brand building.



Optimum Assortment

CGA's first assortment tool allows you to enable your teams to go to showcase the optimal range for outlets and highlight where brands should be placed within a range to achieve highest sales and increase customer satisfaction.



Custom On Premise Research

From online surveys to focus groups to in-outlet interceptions, CGA has access to millions of consumers across the world to answer your most important questions.



Path to Purchase

How consumers make choices in outlet has drastically changed. Which levers can be pulled and where? Understand the decision corridor consumers go through when purchasing a drink.



Bartender Research

Bartenders and servers are the final touch point of influence in the channel. With such change understanding advocacy and bartender needs can lead to influential sales of your products.

Ready to unlock the full potential of Canada's On Premise?

Discover how NIQ's expert insights can help you **drive footfall, meet evolving consumer expectations, and seize the biggest growth opportunities** in Canada's dynamic On Premise landscape.

Whether you're looking to refine your strategy, enhance guest experiences, or stay ahead of market trends - our tailored solutions are here to support your success.

Contact us today to learn how we can help your business thrive.



Mitch Stefani

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