

The Enduring Appeal of the On-Premise

Western Europe – France, Germany, Italy, Great Britain

NIQ





Decoding the allure of the On-Premise

What is driving consumer connection in Western Europe markets?

1

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

2

How do occasion-based preferences impact what consumers expect from beverage offerings?

3

In what ways are value perceptions—such as price sensitivity and promotions—shaping consumer behaviour?

4

What role does Generation Z play in the future of the On-Premise, and how can brands tap into it?

5

How are expectations evolving around personalisation, spontaneity, and new experiences in bars and restaurants?

“

It's abundantly clear that the On-Premise has a very special place in people's hearts in Western Europe. It should be right at the top of the priorities for suppliers and manufacturers, because brands that deliver memorable experiences here can secure valuable trial and loyalty that translates into more Off Premise sales as well. Understanding why consumers go out and how they want to feel when they do is key to winning their spend, and our research provides the insights into their motivators and expectations that are essential for success in a competitive landscape.”

George Argyropoulos

EMEA Managing Director



On-Premise Sentiment

France, Germany, Italy, Great Britain

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 Western Europe markets.

Unique experiences

- On-Premise venues offer an atmosphere they cannot replicate at home demonstrating a strong affinity for the channel



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, and do expect unique and exciting experiences



Recent research highlights the key sentiments and preferences of consumers for the On-Premise venues in France, Germany, and Italy. A crucial takeaway is the presence of local nuances and trends within each market, which can be leveraged to tailor beverage strategies more effectively to meet consumer needs.

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



*Source: France CGA Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 750
Germany CGA Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 1000
Italy CGA Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 750
Great Britain CGA Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 750*

Which of the following best describes **your mindset** when visiting a bar, café, restaurant or other similar venue?



80% I see it as a special occasion or treat

72% Quality of food and drinks is more important than the atmosphere/social aspect



71% Quality of food and drinks is more important than the atmosphere/social aspect

70% I see it as a special occasion or treat



77% Quality of food and drinks is more important than the atmosphere/social aspect

64% I see it as a special occasion or treat



64% Quality of food and drinks is more important than the atmosphere/social aspect

63% I see it as a special occasion or treat

Source: France CGA Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 698,
Germany CGA Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 698,
Italy CGA Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 669-706
Great Britain CGA Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 749

“

The significance of the On-Premise environment is undeniable, providing a venue for socialising, celebrating special occasions, and enjoying experiences that are impossible to replicate at home.”

Miriam Stirnimann

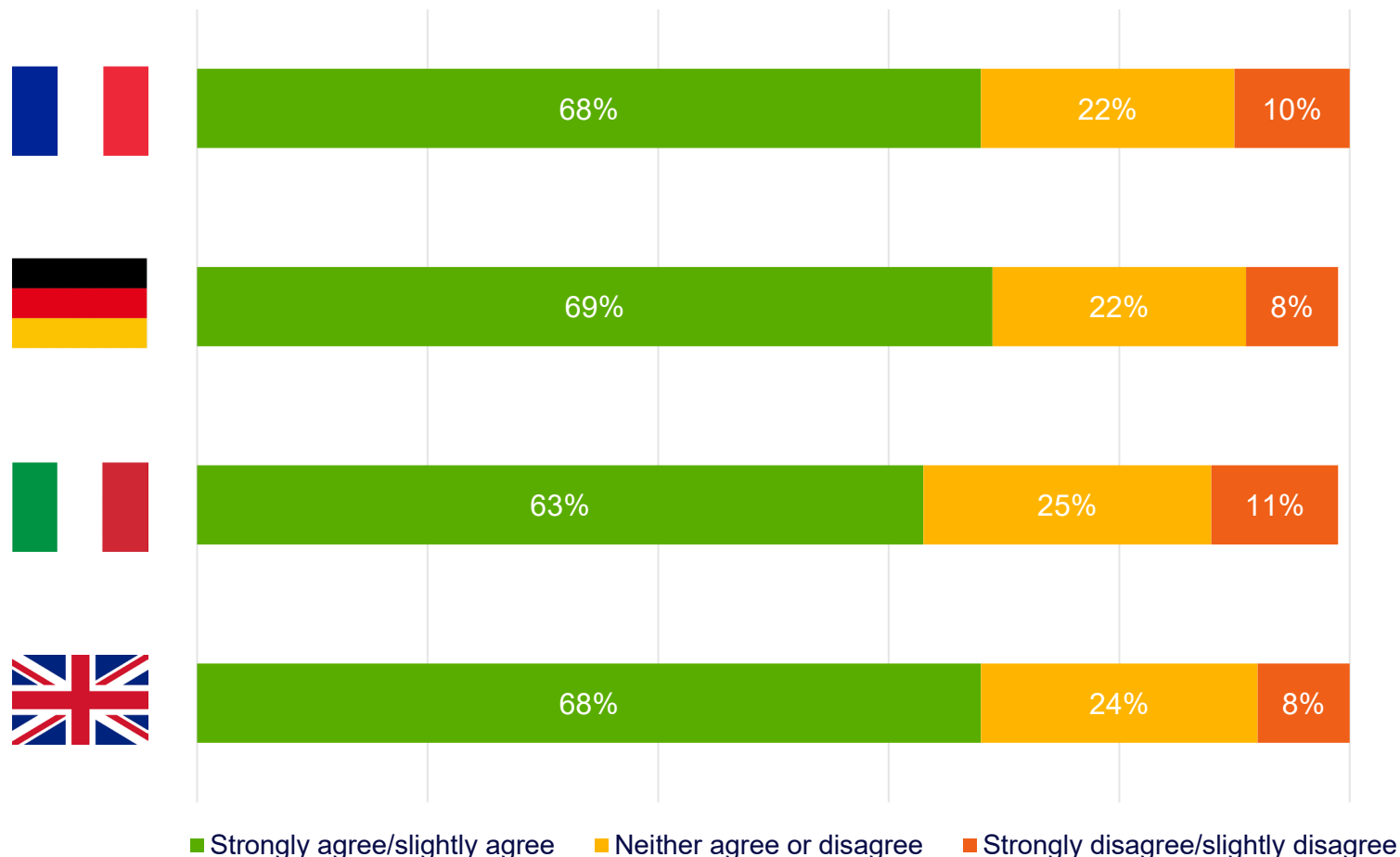
Customer Success & Insight Manager



The latest consumer research reveals the enduring appeal of bars, restaurants and similar venues across Western Europe

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

Agreement levels with On-Premise sentiment statement

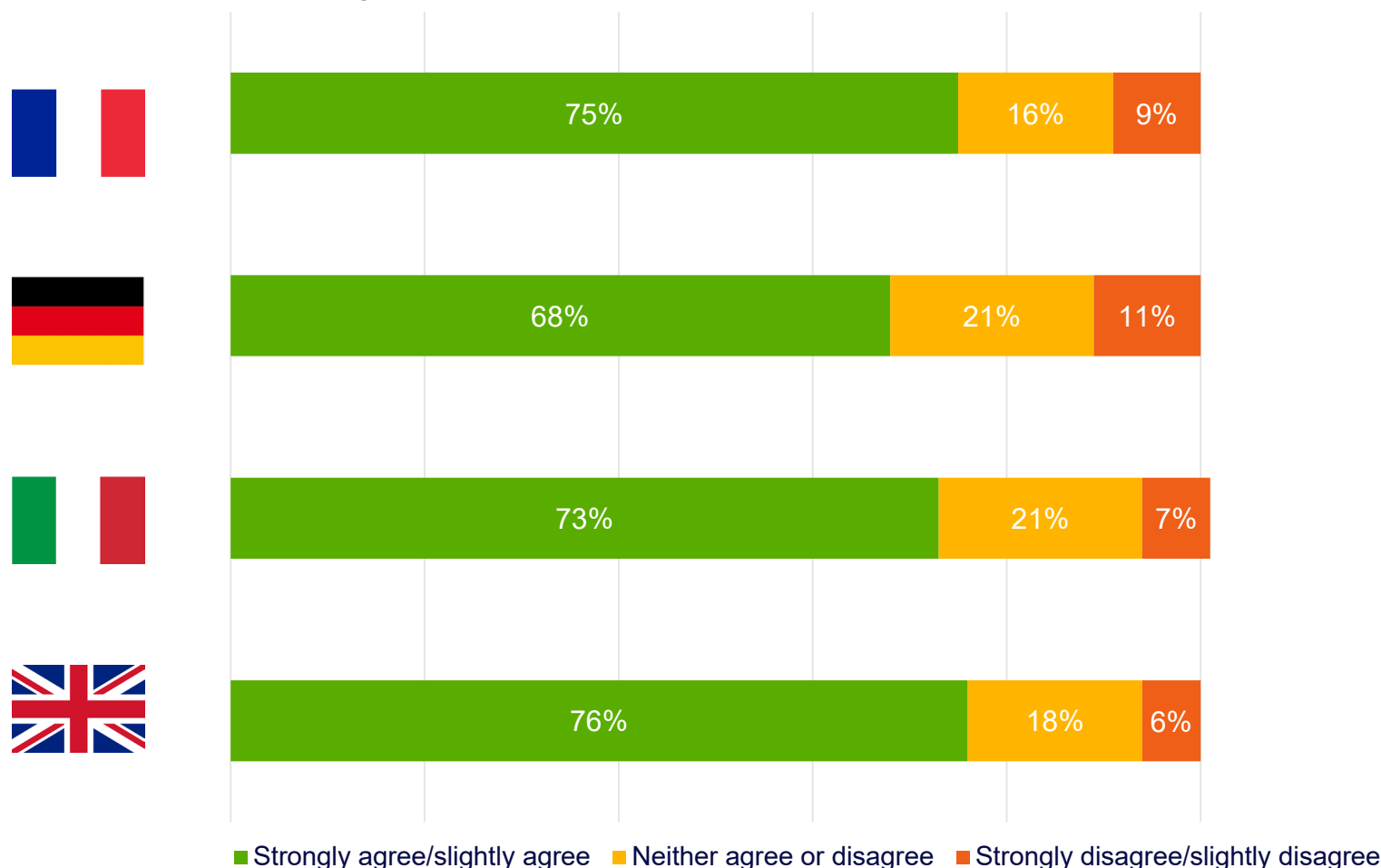


Source: France CGA Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 750
Germany CGA Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 1000
Italy CGA Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 750
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The latest consumer research reveals the enduring appeal of bars, restaurants and similar venues across Western Europe

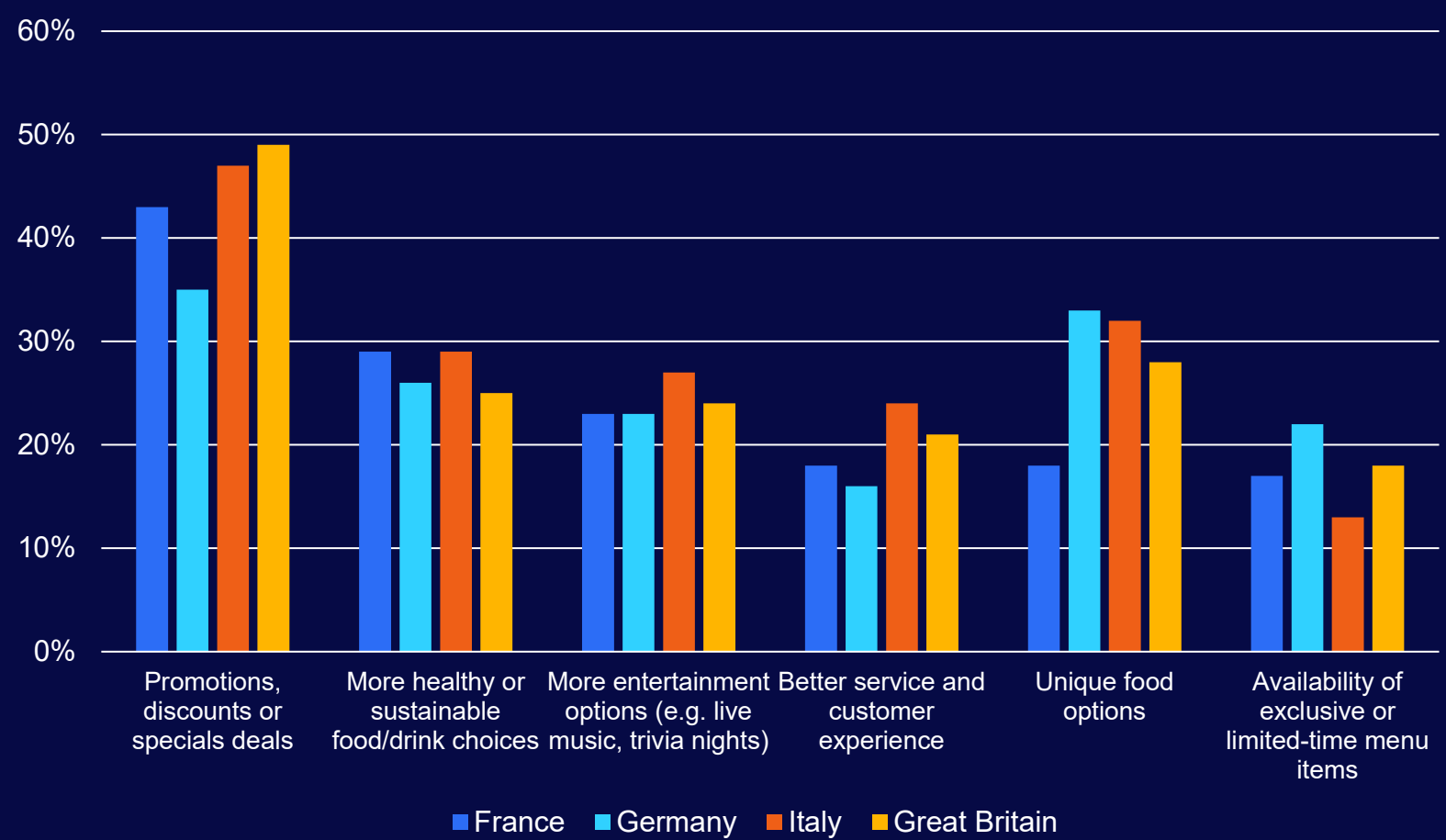
Bars, restaurants or similar venues offers an atmosphere that I *can't replicate at home*

Agreement levels with On-Premise sentiment statement



Source: France CGA Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 750
Germany CGA Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 1000
Italy CGA Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 750
Great Britain CGA Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 750

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



In light of the cost of living crisis, price is a top priority and many consumers want see more promotions, discounts or special deals in bars and restaurants.

Whatever the occasion, guests want to be sure they will get consistently good experiences.

Aspects like health, sustainability and unique options are similarly important across the four countries.

Source: France CGA Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 750
Germany CGA Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 1000
Italy CGA Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 750
Great Britain CGA Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 750

On-Premise Occasions

France, Germany, Italy, Great Britain

On-Premise occasions – at a glance...

The key to unlocking sustained success in the On-Premise lies in recognising that motivations and behaviours differ significantly across occasion types



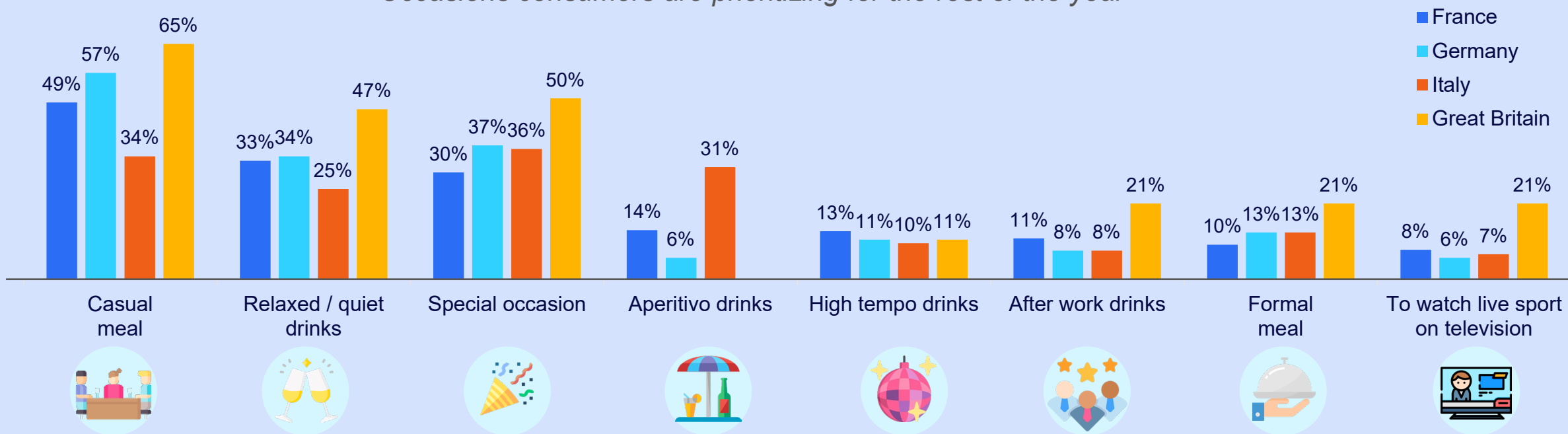
Casual Meals, Special Occasions, and relaxed drinks top the list for Western European consumers prioritisation over the rest of the year

These occasions are largely planned in advance, with spontaneity being popular across after work and high tempo drinks

The type of occasion that consumers visit the sector has a knock-on impact on nearly every other behaviour and decision within the On-Premise

Which of the below occasions are you most likely to prioritise going out for over the rest of the year? *(select your top 2)*

Occasions consumers are prioritizing for the rest of the year



Source: France CGA Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 741

Germany CGA Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 976

Italy CGA Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 720

“

The [French] On-Premise has always been more than just a place for consumption: it's a space for relaxation, enjoyment, and routine. But in recent years, consumers have redefined their expectations. They want more flexibility, more personalization, and above all, a smooth and spontaneous experience... As terraces prepare to reopen, **spontaneity** and the pursuit of pleasurable moments are in the spotlight.”

Julien Veyron

Client Solutions Director – France



Brand positioning and ranging are key to influencing decisions in the *spontaneous* stages of visits

Visits to the On-Premise involve an interesting mix of advance thought and in-the-moment decision-making.

More planning goes into these occasions than some realise—which creates some great opportunities for suppliers and venues to sell drinks in advance and alongside food, and to plan strategies to maximise dwell time and spend.

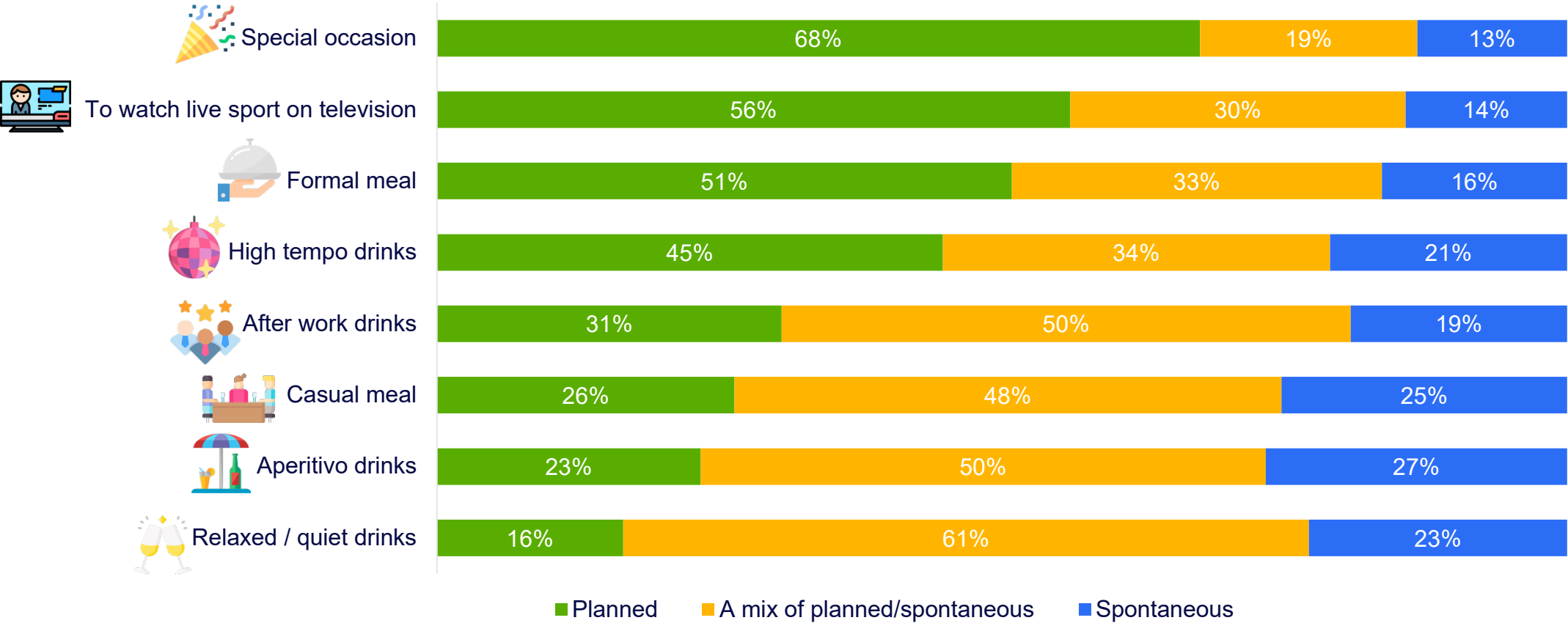
But behaviours are evolving fast, and success here requires an expert understanding of the new-look balance of planning and spontaneity.



YOU HAVE SAID YOU HAVE YOU HAVE BEEN FOR THE BELOW OCCASIONS IN THE PAST 3 MONTHS, ARE THESE OCCASIONS TYPICALLY PLANNED IN ADVANCE OR SPONTANEOUS?

In addition to being a destination for enjoyment, the On-Premise is also synonymous with relaxation for customers. Consumers prefer laid-back moments, whether over a good meal or a drink, and often don't feel the need to plan ahead. Spontaneity plays a key role in many occasions.

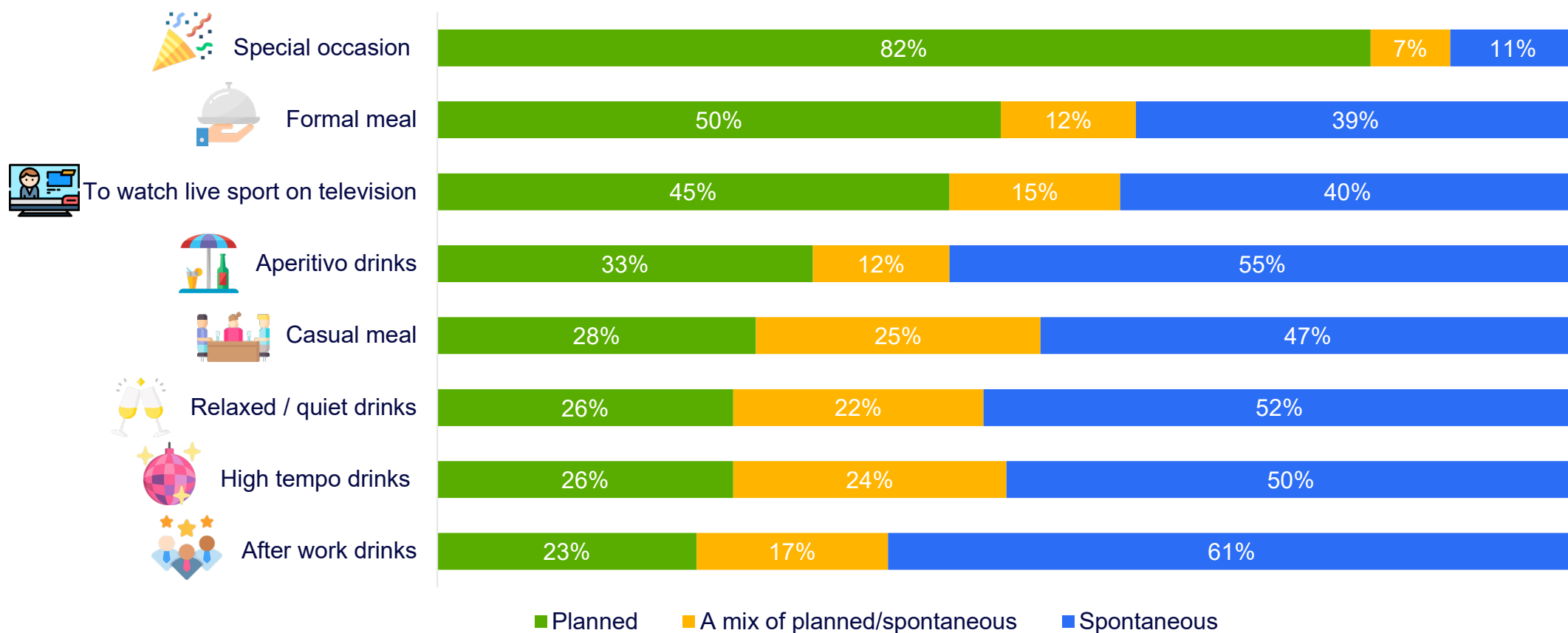
Planned vs spontaneous occasions



Source: France Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 91 - 471

YOU HAVE SAID YOU HAVE YOU HAVE BEEN FOR THE BELOW OCCASIONS IN THE PAST 3 MONTHS, ARE THESE OCCASIONS TYPICALLY PLANNED IN ADVANCE OR SPONTANEOUS?

Planned vs spontaneous occasions

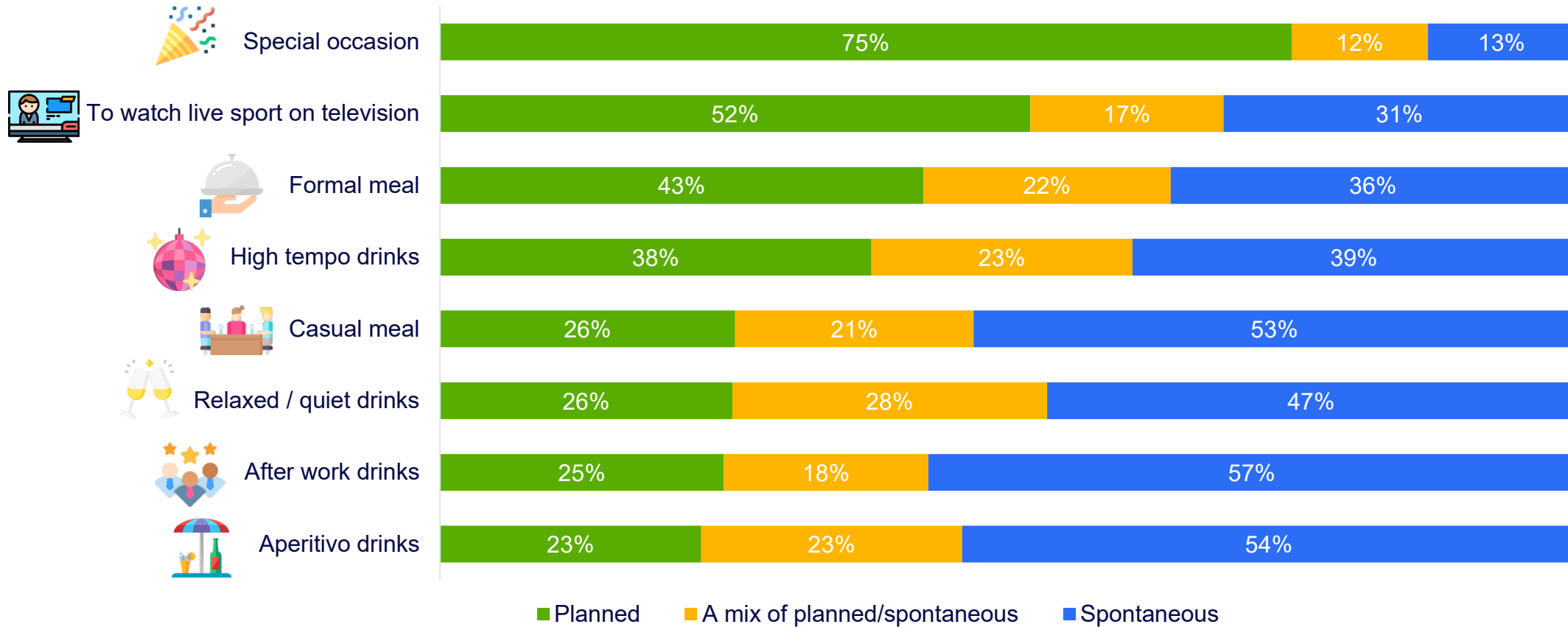


Source: Germany Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 73 - 636

YOU HAVE SAID YOU HAVE YOU HAVE BEEN FOR THE BELOW OCCASIONS IN THE PAST 3 MONTHS, ARE THESE OCCASIONS TYPICALLY PLANNED IN ADVANCE OR SPONTANEOUS?

Planned vs spontaneous occasions

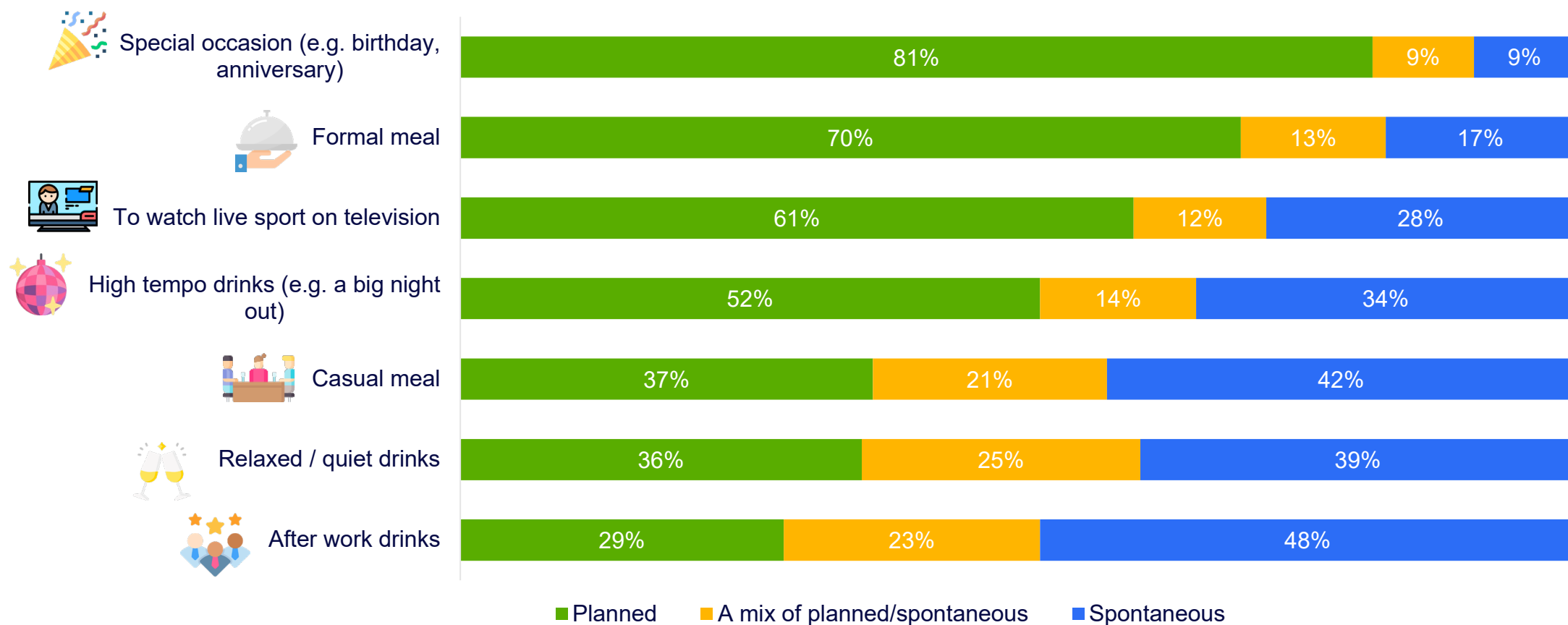
While spontaneity plays a large role in Italy, consumers tend to plan special occasions days in advance, presenting opportunities for venues and producers to engage them through targeted marketing and promotions.



Source: Italy Monthly On-Premise Consumer Pulse Report March 2025 – Sample: 89 - 323

YOU HAVE SAID YOU HAVE YOU HAVE BEEN FOR THE BELOW OCCASIONS IN THE PAST 3 MONTHS, ARE THESE OCCASIONS TYPICALLY PLANNED IN ADVANCE OR SPONTANEOUS?

Planned vs spontaneous occasions



Source: Great Britain by NIQ Consumer Pulse , March 2025. Sample: 39-490

Demographic spotlight

Gen Z

France, Germany, Italy, Poland,
Netherlands, South Africa

Gen Z is the largest, wealthiest, most culturally diverse generation

The Largest Generation Ever:
2 Billion Gen Z-ers

25%

of the world's
population



Gen Z account for 17% of European consumers

Recent global crises have led to a surge of economic migrants, directly impacting drinking habits

Gen Zed will be the richest generation and they are expected to have the highest spending growth. However, their disposable income is being spent in ways different to the previous generations



They are a group of consumers that are highly engaged with the On Trade Channel

% of Gen Z consumers visiting the On Trade on a weekly basis

72%

+16pp vs average consumer

82%



71%



64%



CGA by NIQ Global OPUS Lite 2024, Sample size:30147-169

NIQ

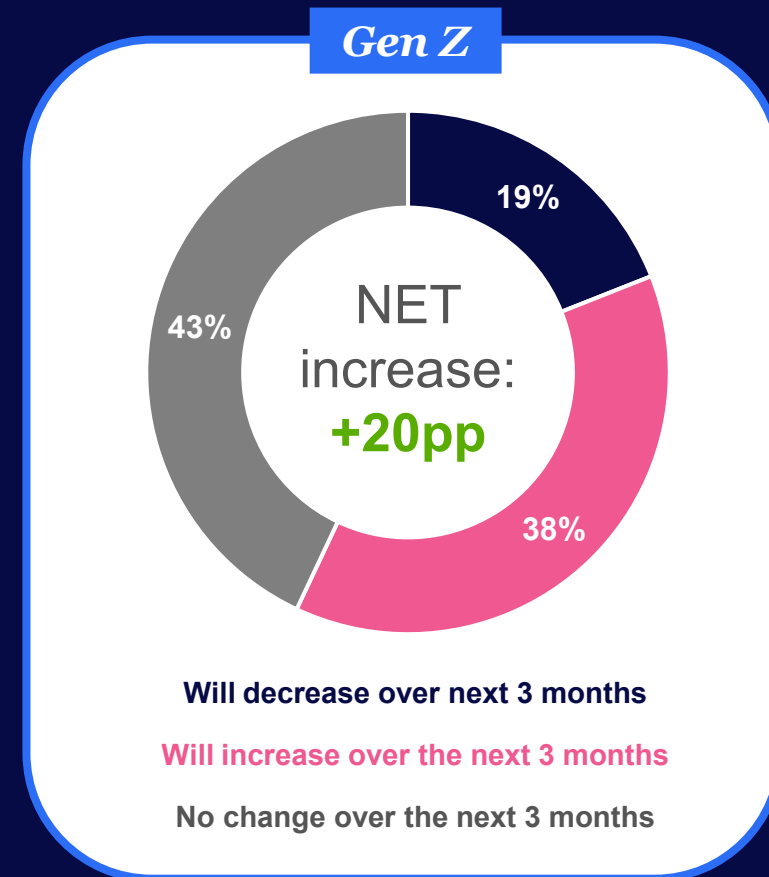


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We expect this engagement with the channel to continue to *grow*

Proportion of Gen Z visiting the On Trade over the next 12 months



Source: CGA by NIQ CGA by NIQ OPUS Lite 2024 sample size: 6718



**Their decisions are often influenced by the
online social circles surrounding them**

3 in 5

 **64%**

 **63%**

of Gen Z consumers agree/strongly agree
that they look through their friends' social media
to get ideas of where to go to eat or drink

CGA by NIQ Global OPUS Lite 2024, Sample size: 2,378 – 50

Building their social currency online is a priority for this group

47%

of Gen Z agree/strongly agree that *documenting what they eat/drink on social media* is very important to them

 49%

46%

of Gen Z agree/strongly agree that they often base their drink choice *on what will look good on social media*

 64%  62%

CGA by NIQ Global OPUS Lite 2024, Sample size: 2,378 – 50

NIQ

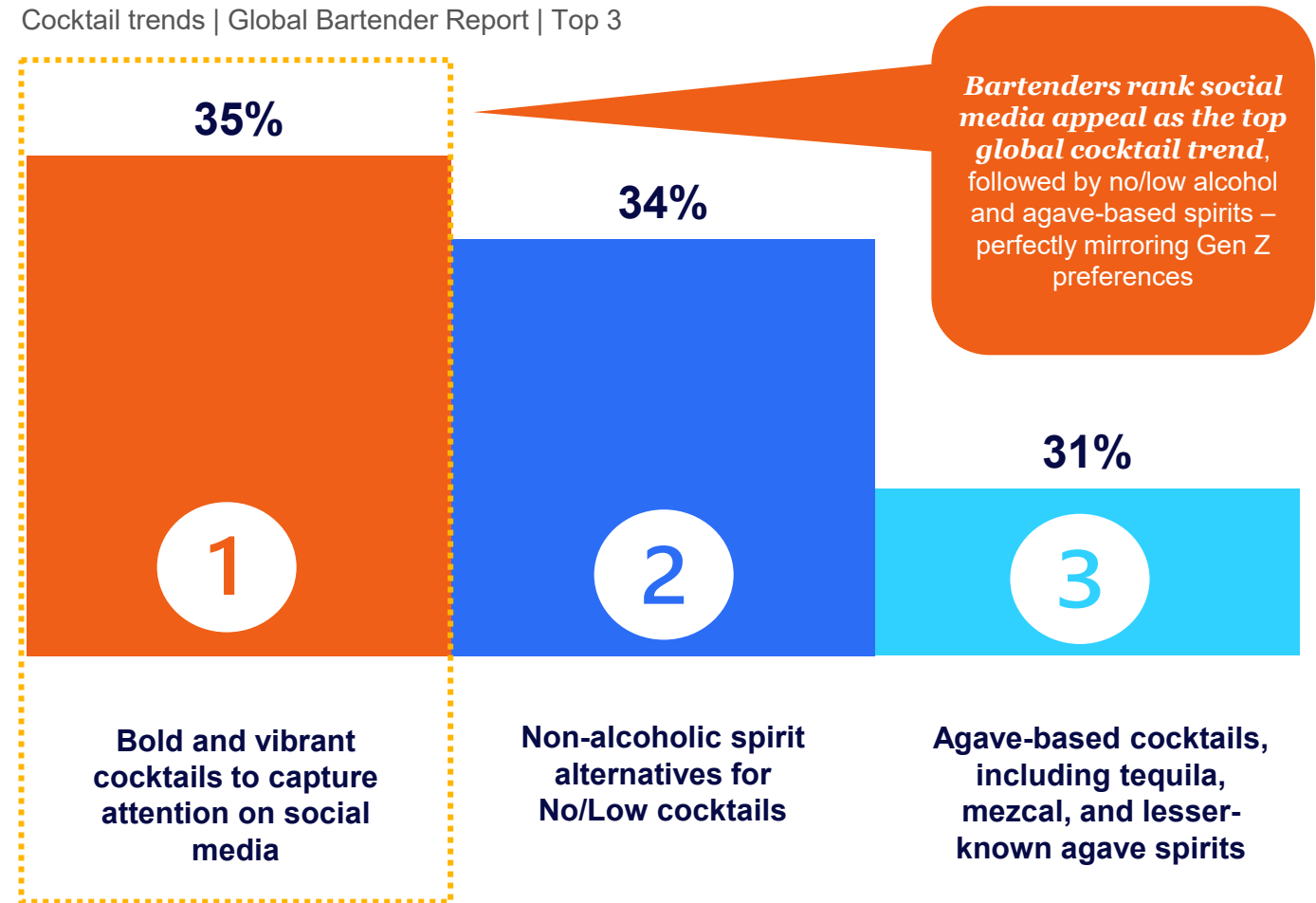


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The importance of aesthetics and social media appeal for global cocktail trends is confirmed by bartenders

Cocktail trends | Global Bartender Report | Top 3

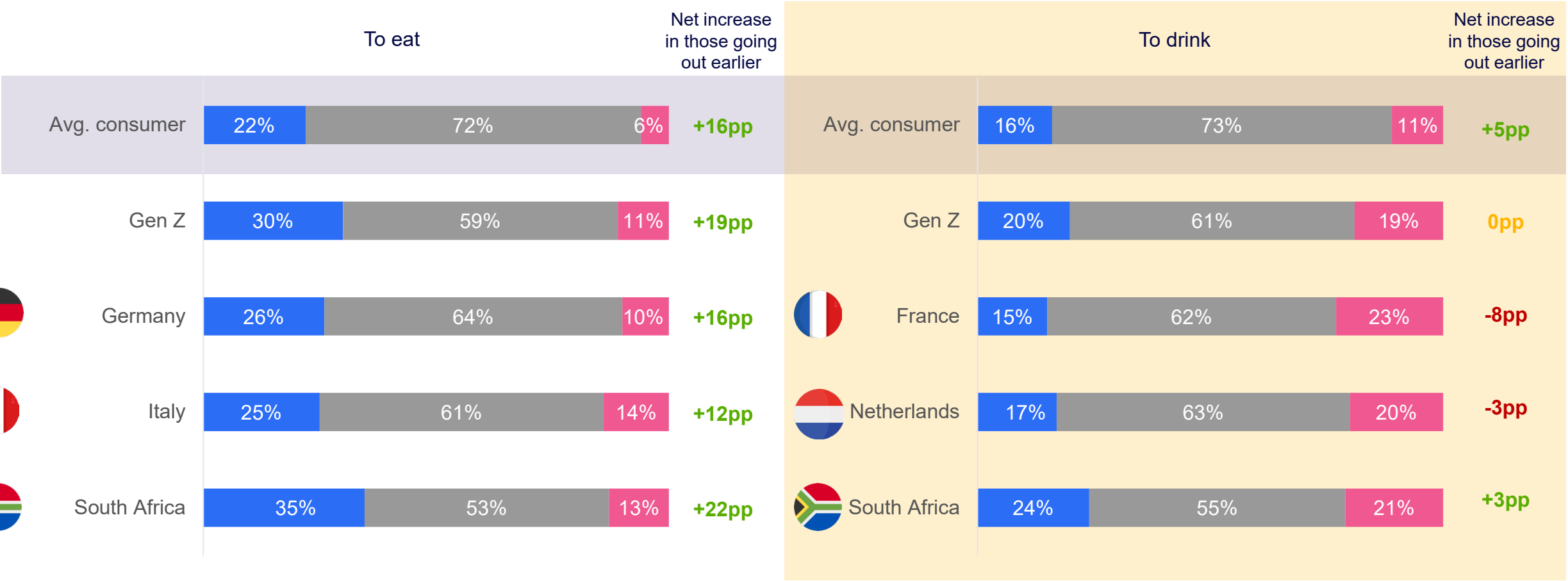


Source: BarSights Global Bartender Report GB 2024, Sample size: 1503

Along with the average consumer, Gen Z shifts towards earlier day parts, particularly for eating occasions

Compared to one year ago, how is the time of day you tend to go out to eat/drink changing, if at all?

Gen Z consumers across markets vs average consumer



CGA by NIQ Global OPUS Lite 2024, Sample size: 30,147 - 169

Earlier | At similar times | Later

“

The German hospitality industry is currently facing challenges with visitor numbers, but Gen Z presents a significant opportunity for the summer... To attract this demographic, businesses need to be creative. Offering a wider range of soft drinks and engaging promotions is crucial. Outdoor events during the warmer months can further attract interest. This is not only important for Generation Z but also essential for revitalising the entire industry and ensuring its future.”

Stephen Wann

Customer Success Director - EMEA



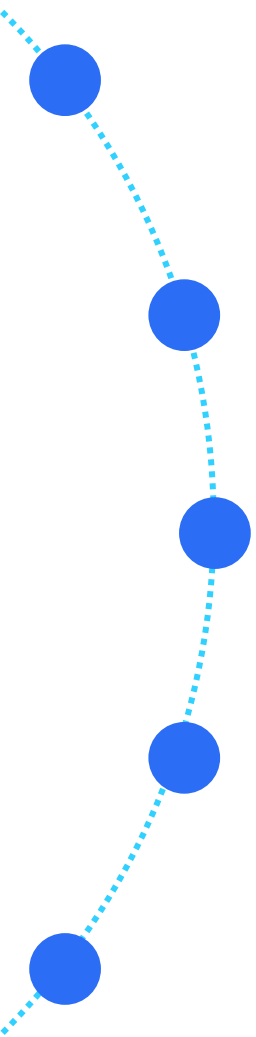
Want to know more about Gen Z?

[WEBINAR] How to win with Gen Z: Identifying trends in the everchanging HoReCa channel



Take me to the webinar!





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.



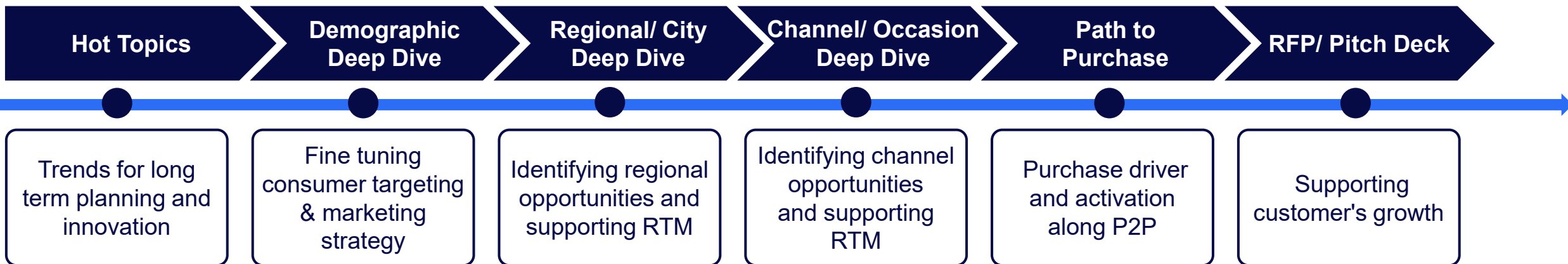
Your On-Premise Journey



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 budgets are spent more effectively in On-Premise brand building.



Optimum Assortment

CGA's 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.

Thank you!

CGA by NIQ On-Premise

