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Global Perspectives: On Premise trends driving the Beverage Alcohol industry

Trends and insights of consumer engagement with the On Premise around the world

The On Premise is where brands win

86% of consumers visit the On Premise at least quarterly

25% of consumers expect visitation to increase over the next year

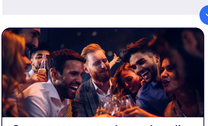
57% of all consumer spending on Beverage Alcohol
** takes please in the On Premise

$212bn in value sales* *(-0.6% vs 1YA)*

Consumers have an enduring passion for bars, pubs and restaurants around worldwide.

The On Premise remains the most important channel for Beverage Alcohol brands in terms of sales—but also, critically, as a place for discovery.

**Based on NIQ data from 19 global markets* ***Spirits & Beer / FMB / Cider (excl. Wine)*



Consumers want value and quality

58% are likely to pay extra for a better quality drink *(+2pp vs 1YA)*

2in3 consumers would opt for less quantity and more quality

Beer is #1 for value for money from consumer perceptions based on On Premise experiences

The consumer demand for 'fewer but better' drinks continues to shape On Premise habits and drinks brands' strategies.

Brands need local relevance

The USA On Premise accounts for $94bn alcohol sales *(more than Australia, Germany, France, Canada and UK combined)*

The On Premise can't be seen as one global entity—it's a complex landscape with nuances in consumer behaviours and preferences.

Spend is condensing into big visits

share of sales of top 20 UK trading days in 2024

14.5% **Spirits** (+4% YoY)

9.5% **LAD** LAD (+2% YoY)

$127 is the average monthly consumer spend *(+0.24% vs 1YA)*

Consumers average category repertoires increase by 6% for event-driven visits compared to routine visits

When it comes to value, the big opportunity sits with event-led visits.

Public holidays, special occasions and big sporting events are all more important than ever, and they tend to focus consumers' minds on premiumization and experimentation.

Eating and drinking out is getting earlier

25% of consumers in Italy go out for Aperitivo drinks at least weekly (#1 occasion)

34% of consumers in Africa are eating out earlier vs YA, while only 8% eating later

6.12pm is peak time for restaurant bookings in the UK

As consumer habits shift across the globe, visits to the hospitality sector are shifting towards earlier day parts, on both food and drink-led occasions.

There's a desire to disconnect

39% of consumers say they find social media-friendly baRs appealing, 14% unappealing

48% find the idea of disconnection bars appealing

Global interest in mental wellbeing is leading a growing number of consumers to use hospitality to take time out from hectic everyday life.

Interest in wellbeing is changing consumption

40% of global On Premise consumers say leading a healthy lifestyle is one of their top priorities.

63% are moderating their intake of alcohol in some way

22% of moderating Gen Z consumers are doing so by only choosing to drink when visiting On Premise

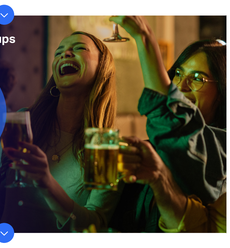
Moderating consumers often like to choose pubs, bars and restaurants for the moments when they do indulge. Moderation doesn't mean people want to drink out any less, and the trend has opened up opportunities for no-alcohol lower-strength alternatives.

People still want treats and trade-ups

58% of consumers are now likely to pay extra for a better quality drink

48% of consumers treat themselves weekly (28% monthly)

Eating and drinking out are the two most popular ways for global consumers to treat themselves



Bartender advocacy is crucial

56% say they enjoy being educated about drinks by knowledgeable bartenders

88% of bar staff typically make at least one drink recommendation to a guest every shift

1in3 consumers like to regularly try new drinks brand or categories in the On Premise

REACH delivers expert analysis of 43 key markets with responses from over 33,000 On Premise consumers.

To learn more about global On Premise and out of home beverage alcohol insights, and to discuss country and regional specific analyses, get in touch.

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