

A background image showing a group of people at a social gathering, holding glasses of refreshing drinks with ice, lemons, and mint. The image is slightly blurred, focusing attention on the text overlay.

ITALY ON PREMISE CONSUMER PULSE REPORT

CGA by NielsenIQ, May 2026

NielsenIQ powered by **CGA** intelligence

Overview of On Premise visitation during May

Food-led visits dominate, but drinks win inside the venue

Eating out is consistently more common than drink-only occasions.

Overall visitation and frequency are stable and already very high (near-universal annual reach).

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Shift focus from driving footfall to influencing in-venue choice: menu presence, staff recommendation, visibility at table/bar, and premium or distinctive serves that trade consumers up during food-led occasions.

Drinks performance is driven by quality, value and excitement

Satisfaction with drinks is high across quality of serve, excitement and value for money, but varies by category.

Consumers associate positive experiences with well-served, good-value, and interesting drinks rather than routine choices.

Trial is linked to curiosity, branded reassurance and consistency.

Support operators with fewer, better-executed serves: clear category roles, branded cues, and consistent quality standards that justify price and encourage repeat ordering.

Summer creates a clear near-term opportunity to lift drink spend

44% of consumers expect to increase On Premise visits next month.

Net intent skews positive, especially among younger consumers and in Rome.

Activate during this period, with a particular attention towards serves that are fit for a young demographic to fully take advantage of the approaching summer holidays among students.

FIFA attendance rates and trends

FIFA championship represents an opportunity

With close to 1 in 3 consumers planning to watch the FIFA matches in the On Premise, the event represents an opportunity to capitalise on the higher footfall.

Consumers are most likely to watch the event in bars, restaurants and cafés, which are therefore the most likely to benefit from this rise.

Promote venues and products ahead of the event to attract On Premise visitors.

Sports events fuel socialisation

The consumers that are planning to watch the World Cup in the On Premise do not do solely to witness the sport event, but rather to socialise with their friends and for the atmosphere they wouldn't be able to find at home.

Interestingly, the screen size and viewing experience comes second to socialisation.

When implementing promotional strategies ahead of the event, focus on multi-serve offers to cater to this highly social occasion.

Alcoholic drinks are expected to lead consumption

Beer is the main beverage consumers are expecting to drink whilst watching FIFA World Cup in the On Premise, with 3 in 5 consumers willing to do so.

2 in 5 consumers are expecting to drink Aperitifs and close to 1 in 3 (32%) planning to drink Cocktails, presenting a prime opportunity for the Spritz serves.

Ensure effective distribution of Beer and Spirits fit for Cocktail serves ahead of the event.



CGA'S MONTHLY CONSUMER PULSE

- This monthly On Premise Consumer Pulse report is intended to capture consumers consumption patterns and how they fluctuate in the transition period from January to May 2026 in Italy.
- This study looks into consumer's On Premise behaviour over the *past month* and tests visit intention for the *month ahead*.
- In other countries, this monthly check-in has become a staple for beverage suppliers and other businesses interested in the channel.
- These monthly updates will help interested parties to stay close to the consumer's intentions and behaviours for our beloved On Premise channel.
- For this **May 2026** issue, we surveyed 750 consumers (aged 18+) between May 23rd – 26th 2026. These consumers were situated across all Italian regions and must typically visit On Premise venues at least once within a 3-month period.

Key metrics & On Premise visitation



LOOKING BACK



85%

of consumers have been out to eat in the previous month

+5pp vs May last year

+5pp for Rome

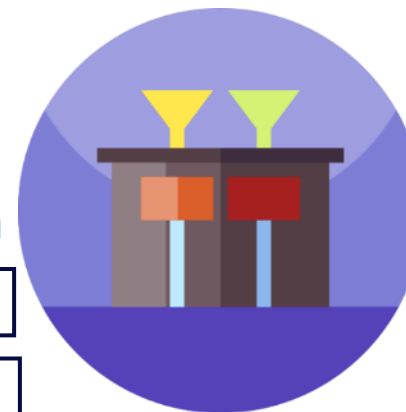
58%

of consumers have been out for a drink in the previous month

+3pp vs May last year

-8pp for Rome

+3pp for Gen-Z



Source: CGA Monthly On Premise Consumer Pulse Report May 2026, 2026 – Sample 129 - 750

LOOKING BACK

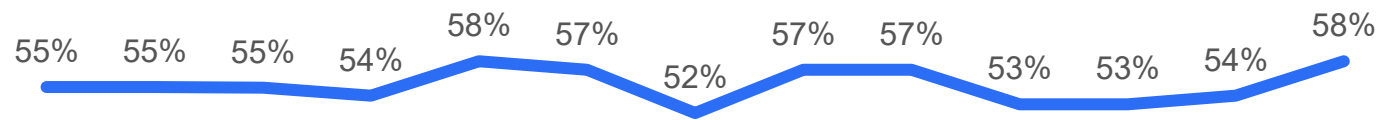
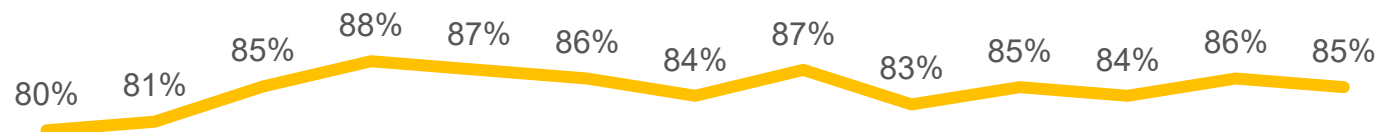


96% consumers visited the
On Trade this month

+1pp vs May last year

FREQUENCY VISITING THE ON PREMISE OVER THESE LAST MONTHS

Yearly visitation rates to the On Premise



May Jun Jul Aug Sept Oct Nov Dec Jan Feb Mar Apr May

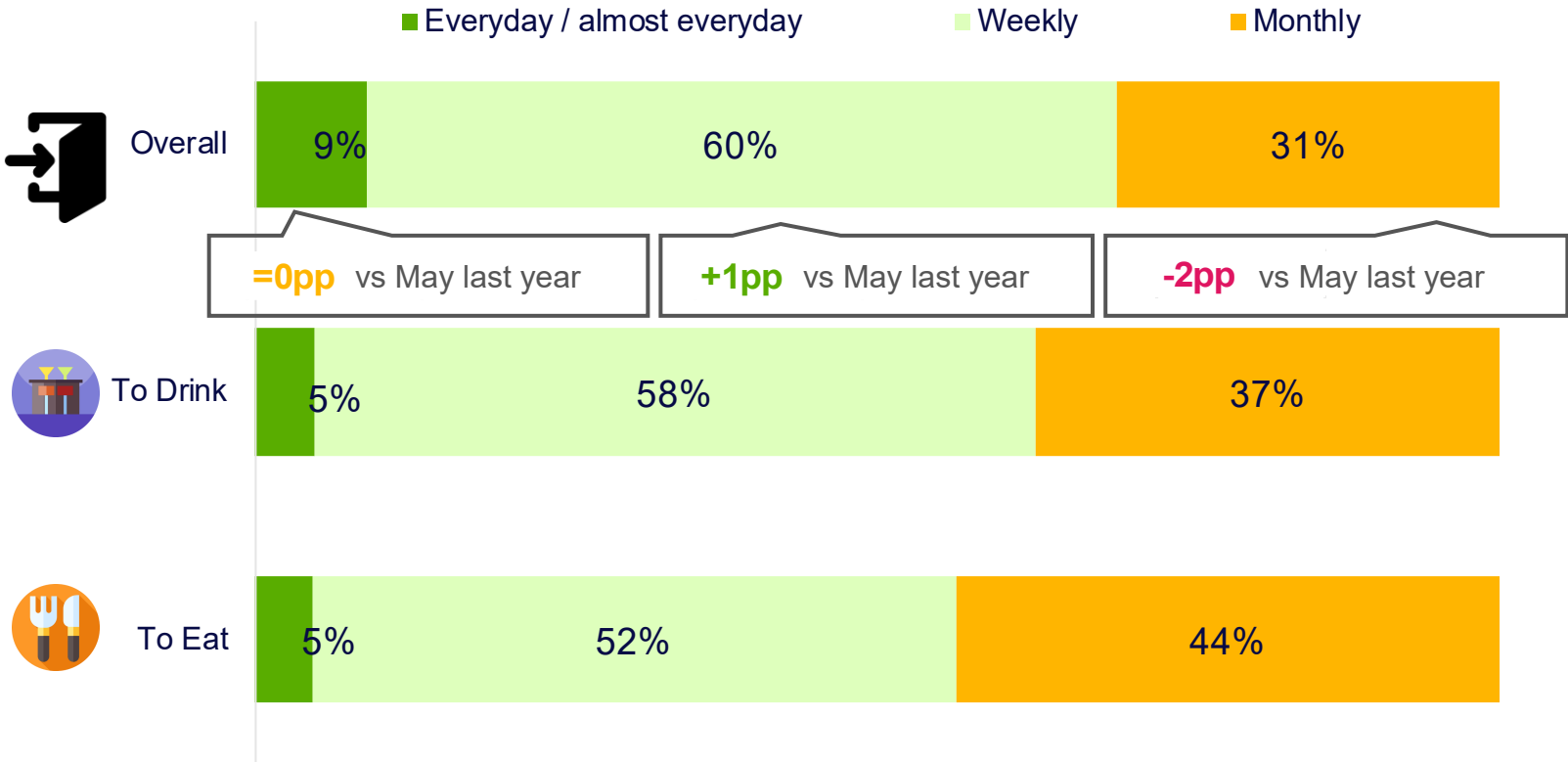
— Have been out to eat in the last month

— Have been out to drink in the past month

Source: CGA Monthly On Premise Consumer Pulse Report May 2026, 2026 – Sample: 750 - 757

HOW OFTEN HAVE YOU VISITED BARS, RESTAURANTS AND SIMILAR VENUES OVER THE PAST MONTH?

Frequency visiting On Premise in the past month



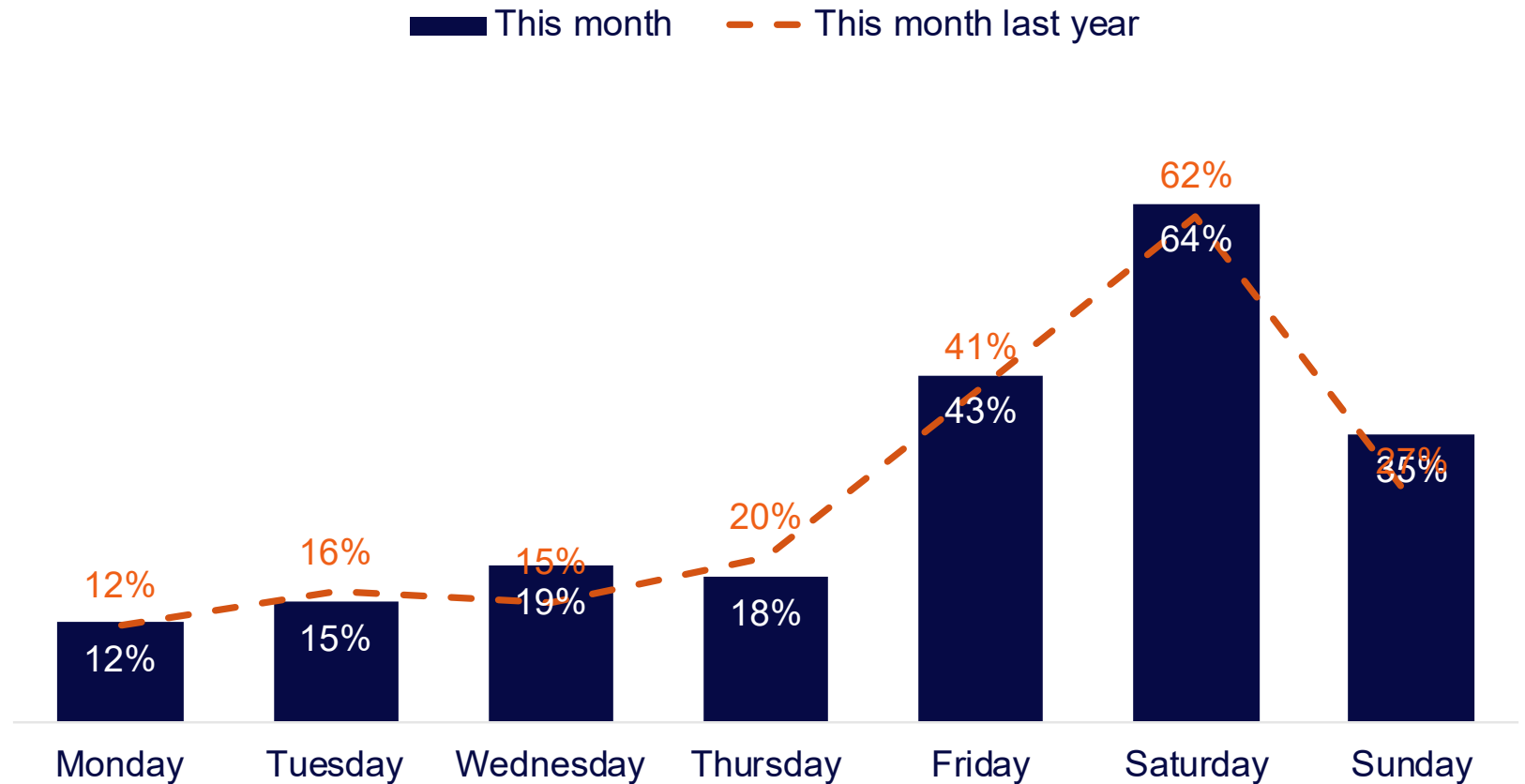
Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 434 - 722





ON WHICH DAY(S) OF THE WEEK HAVE YOU VISITED A BAR, RESTAURANT OR OTHER SIMILAR VENUE OVER THE PAST MONTH?

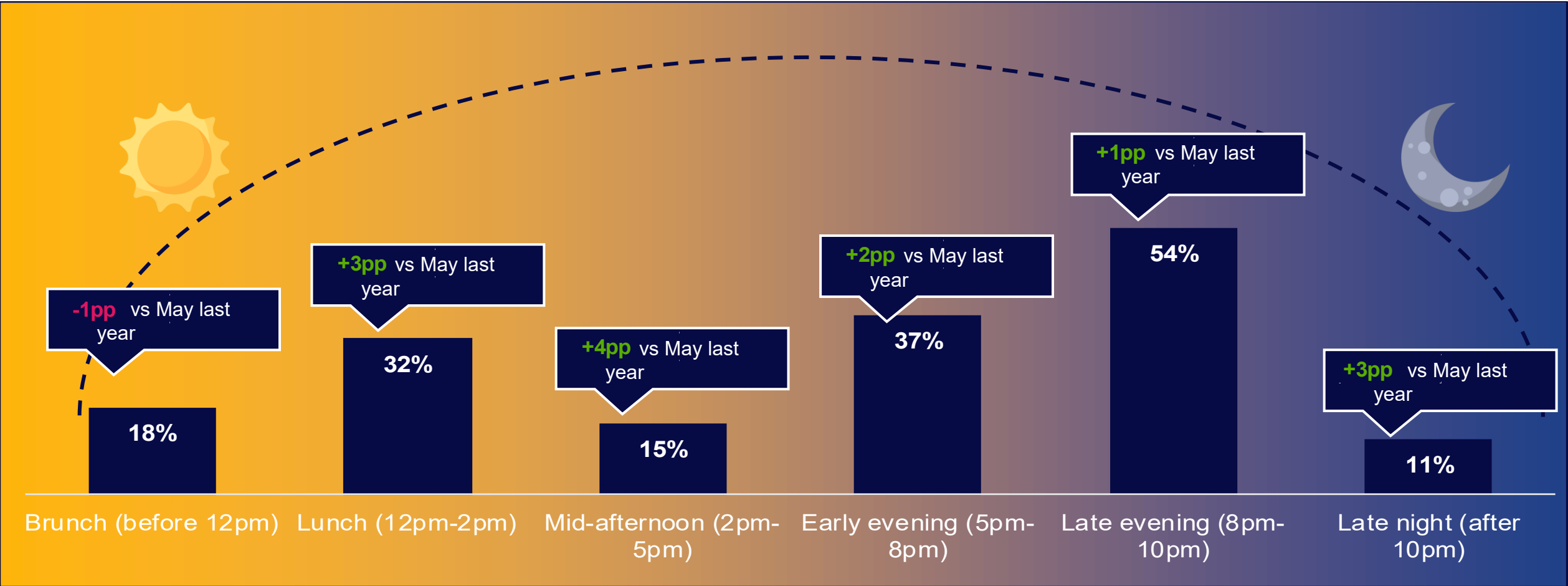
Day of the week visiting the On Premise



Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 715 - 722

WHAT TIMES OF DAY HAVE YOU BEEN VISITING BARS, RESTAURANTS AND SIMILAR VENUES OVER THE PAST MONTH?

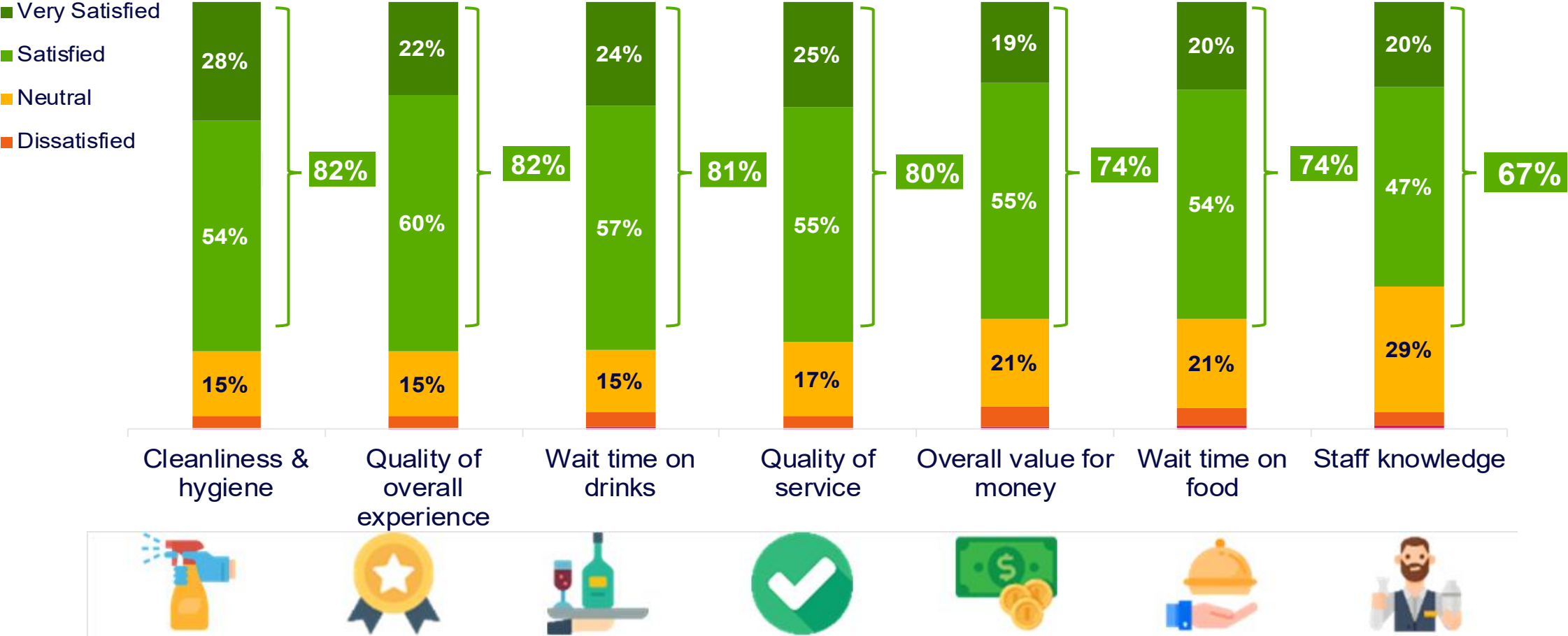
Time of day for visiting the On Premise



Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 713 - 722

SATISFACTION WITH MOST RECENT VISIT TO THE ON PREMISE

Proportion of consumers very satisfied/satisfied with...



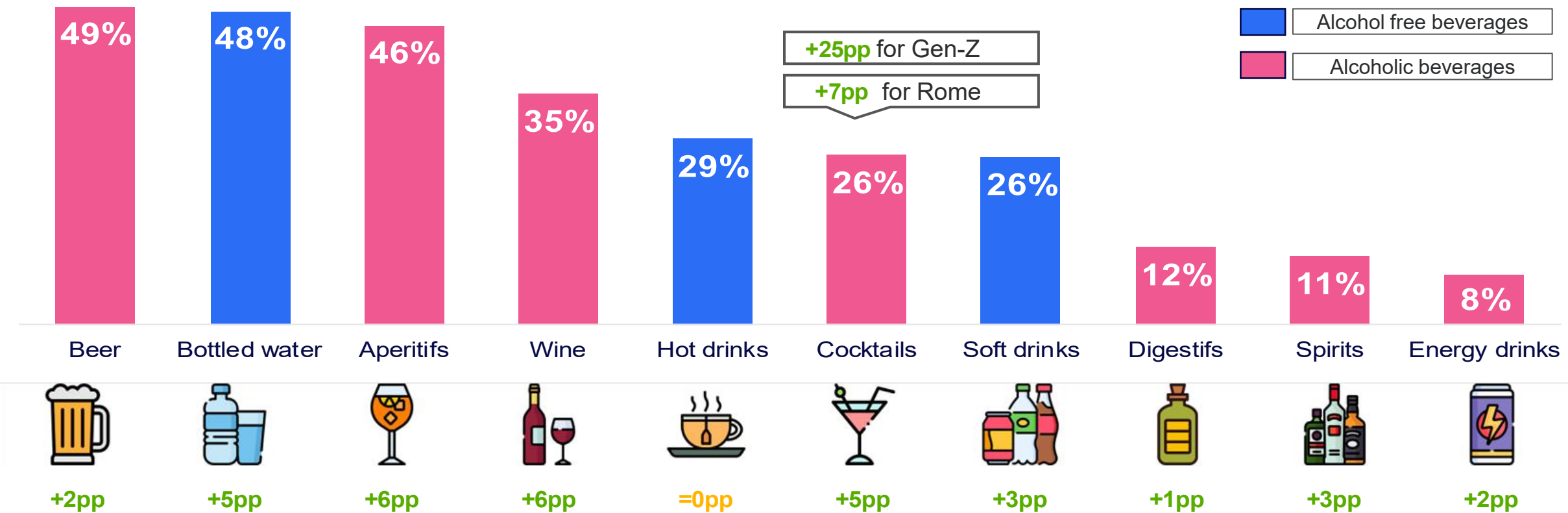
Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 640 - 750

Key Metrics: Categories Drunk



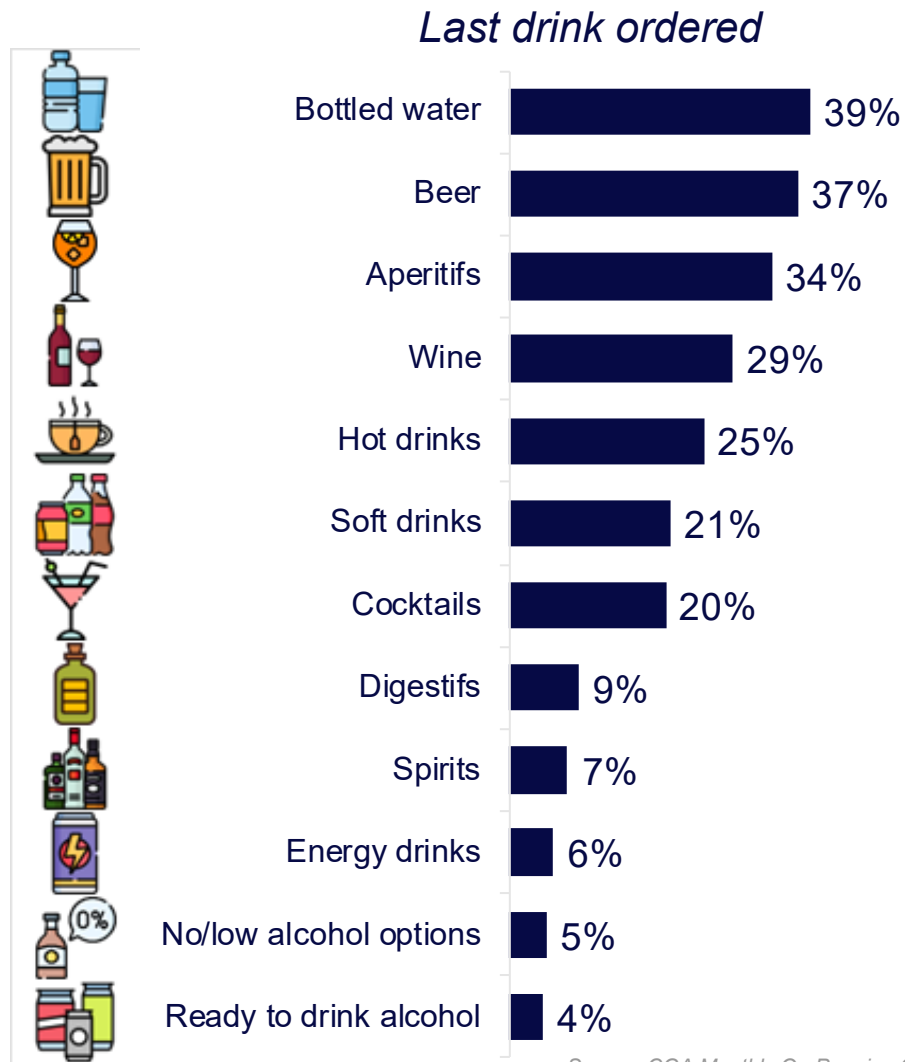
WHICH OF THE FOLLOWING DRINKS HAVE YOU DRANK IN BARS AND/OR RESTAURANTS IN THE PAST MONTH?

Most popular drink categories | Indexed vs. Last year



Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 125 - 722

THINKING ABOUT **YOUR MOST RECENT VISIT TO A BAR, RESTAURANT OR SIMILAR VENUE, WHICH OF THE FOLLOWING CATEGORIES DID YOU DRINK?**



Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 750

HOW SATISFIED WERE YOU WITH THE DRINK(S) THAT YOU HAVE HAD ON YOUR MOST RECENT VISIT REGARDING ITS VALUE FOR MONEY?

Shown to individual drink category consumer on latest visit

% **very satisfied** / **satisfied** with **value for money**



Digestifs

Hot drinks

Wine

Spirits

Cocktails

Aperitifs

Beer

Bottled water

86%

83%

83%

82%

82%

81%

81%

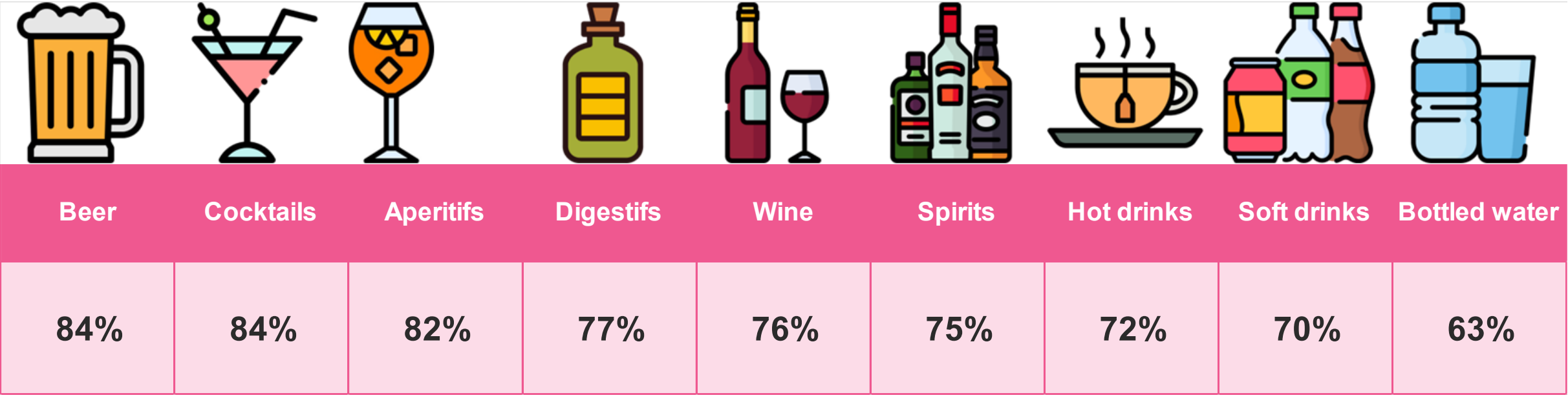
72%

Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 56 - 289

HOW SATISFIED WERE YOU WITH THE DRINK(S) THAT YOU HAVE HAD ON YOUR MOST RECENT VISIT REGARDING HOW EXCITING IT WAS?

Shown to individual drink category consumer on latest visit

% very satisfied / satisfied with how exciting the drink was 🌟



Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 56 - 277

HOW SATISFIED WERE YOU WITH THE DRINK(S) THAT YOU HAVE HAD ON YOUR MOST RECENT VISIT REGARDING ITS **QUALITY OF SERVE?**

Shown to individual drink category consumer on latest visit

% **very satisfied** / **satisfied** with **The overall quality of the serve** 

								
Digestifs	Beer	Wine	Hot drinks	Spirits	Aperitifs	Cocktails	Bottled water	Soft drinks
88%	86%	84%	83%	82%	82%	79%	77%	73%

Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 56 - 277



HAVE YOU TRIED A NEW DRINK WHEN EATING OR DRINKING OUT OVER THE PAST MONTH?

+28pp for Gen-Z

+7pp for Milan



23%

Yes



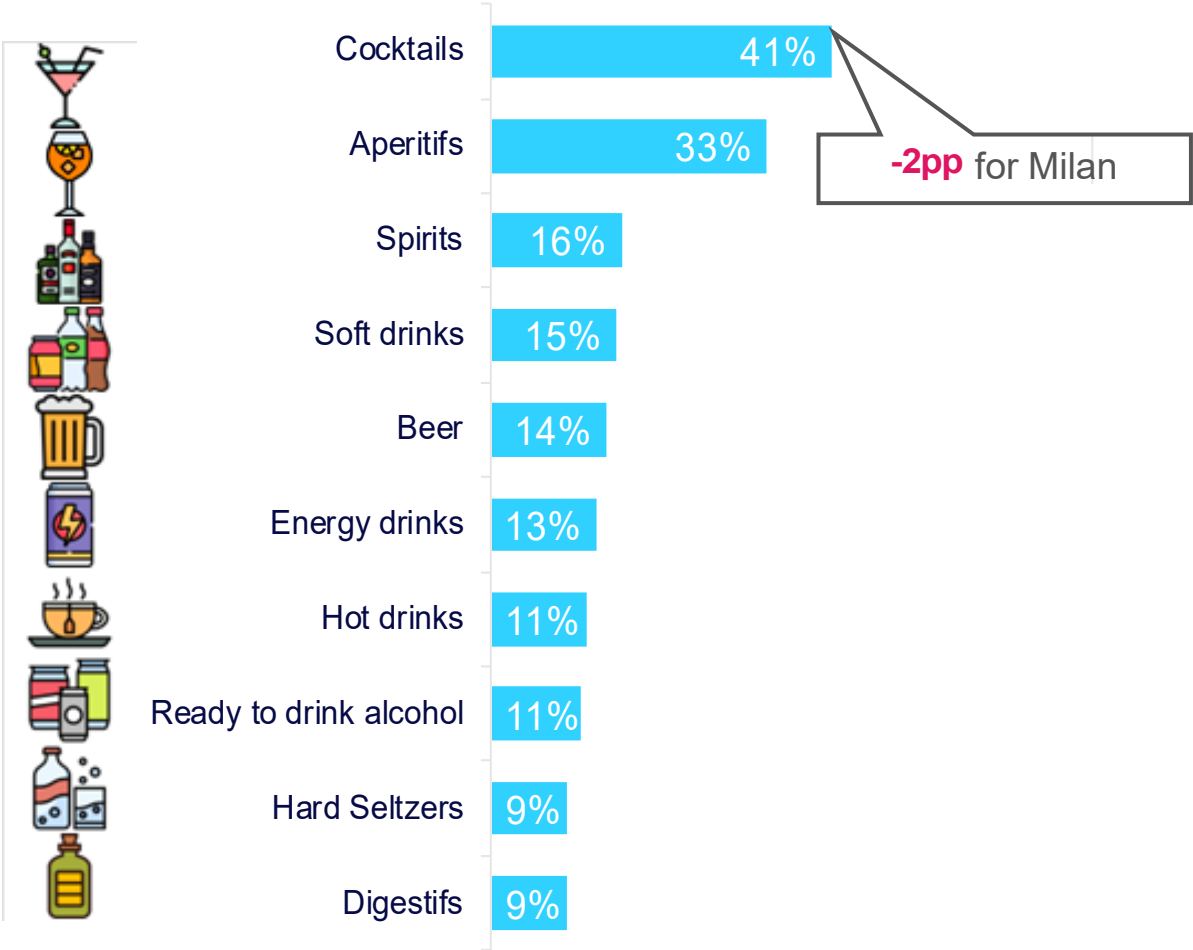
77%

No

Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample 142 - 722

WHICH OF THE FOLLOWING CATEGORIES WAS THE NEW DRINK THAT YOU TRIED?

Top 10 new drinks tried by those going out for food and drinks



Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 142 - 722

Key Metrics: Next Month Prognosis





80%

of consumers plan to go out
to eat in the next month

+3pp for Rome

+9pp for Milan

39%

of consumers plan to go out
for a drink in the next month

-6pp for Rome

+7pp for Milan

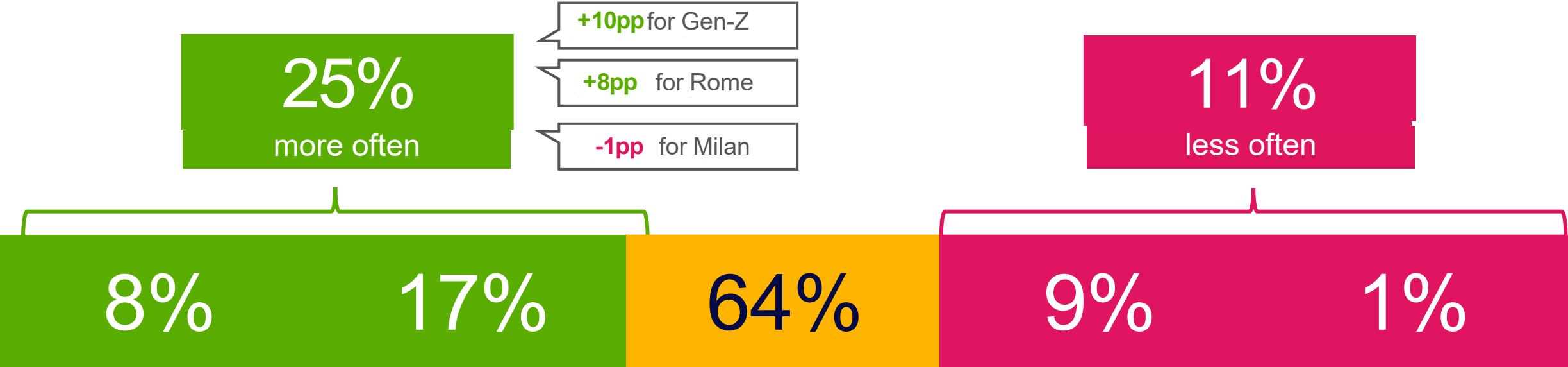


LOOKING FORWARD



HOW OFTEN DO YOU PLAN TO VISIT BARS, RESTAURANTS OR OTHER SIMILAR VENUES OVER THE NEXT MONTH?

Frequency consumers plan to visit the On Premise in the next month

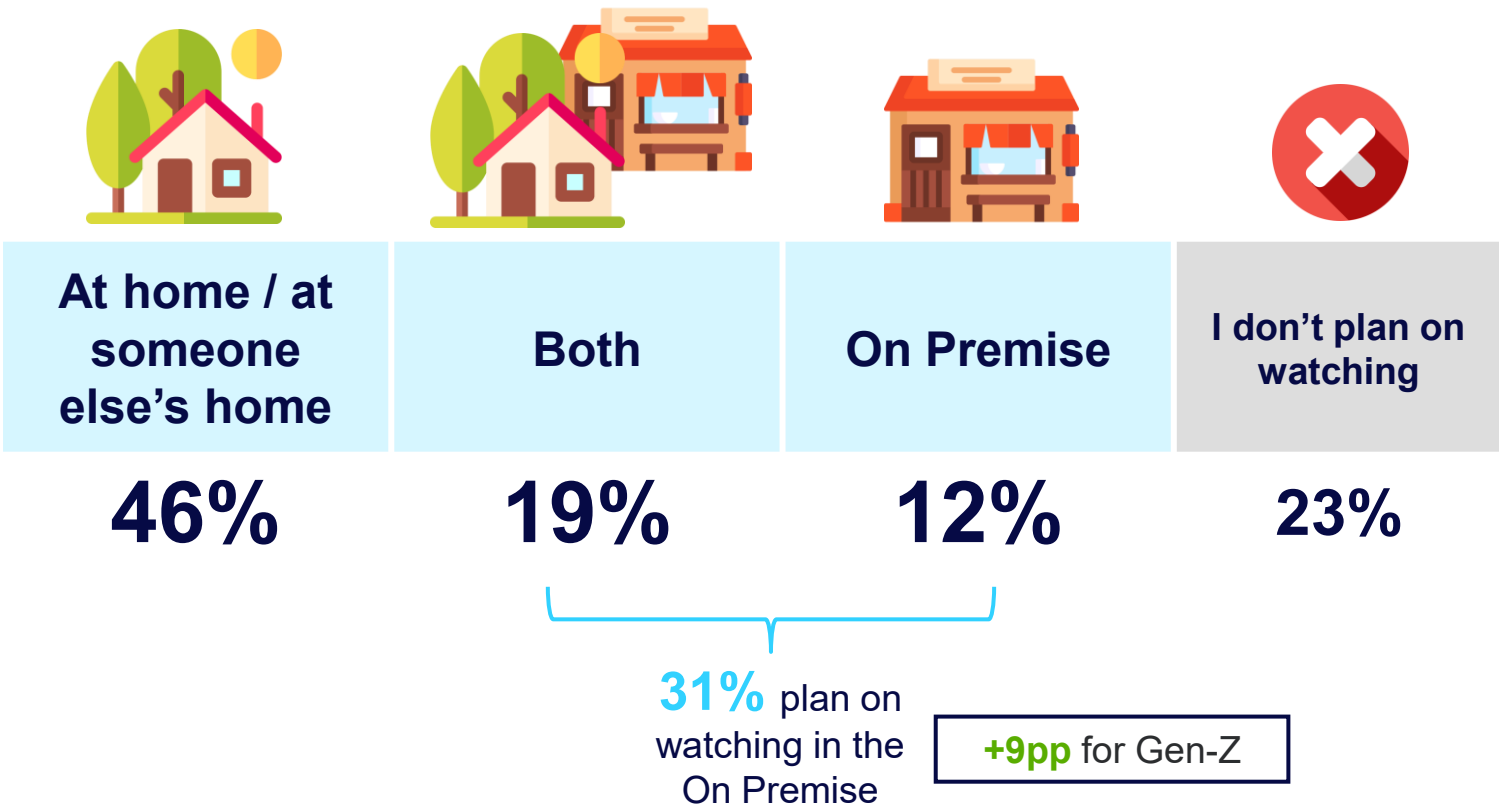


Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 123 - 717



WHERE DO YOU PLAN ON WATCHING THE 2026 FIFA WORLD CUP?

Places where consumers plan on watching the FIFA World Cup

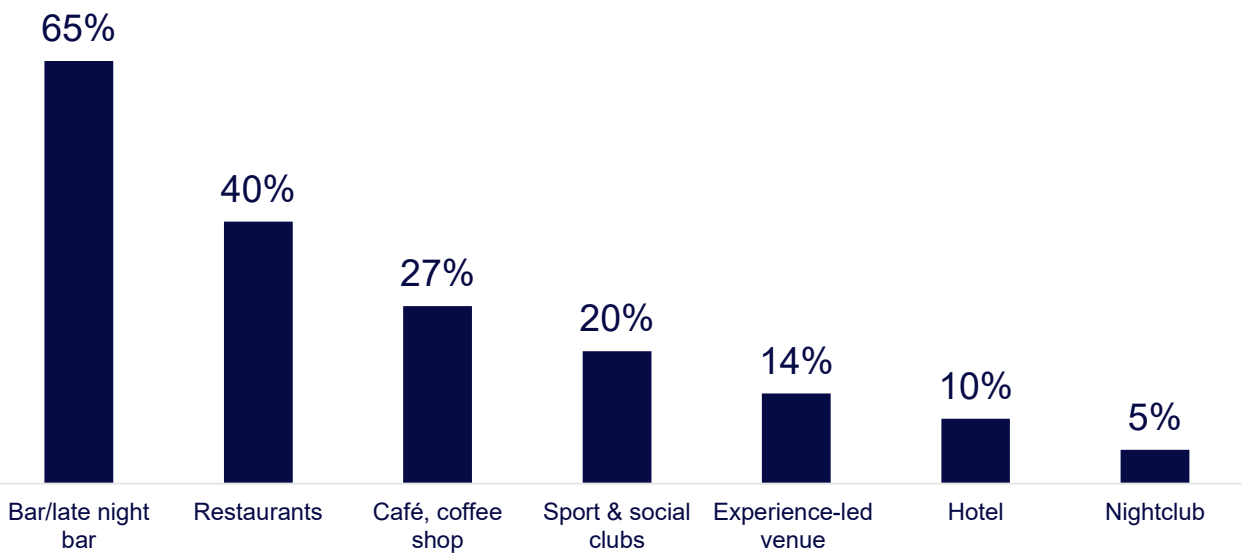


Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 153 - 750

WHERE DO YOU PLAN TO WATCH THE 2026 FIFA WORLD CUP?

Asked to those who plan on watching in On Premise

Top 5 venues where consumers plan to watch the World Cup



WHAT ARE YOUR MAIN REASONS FOR WATCHING THE WORLD CUP AT A BAR / RESTAURANT RATHER THAN AT HOME?

Asked to those who plan on watching in On Premise

Top 10 main reasons to watch the World Cup in On Premise



Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 231



WHICH OF THE FOLLOWING MATCHES ARE YOU LIKELY TO GO OUT FOR?

Asked to those who plan on watching in On Premise

World Cup matches consumers will watch in the On Premise



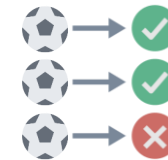
Finals

64%



Semi-finals

64%



**Knockout
rounds**

47%



**Group stage
matches**

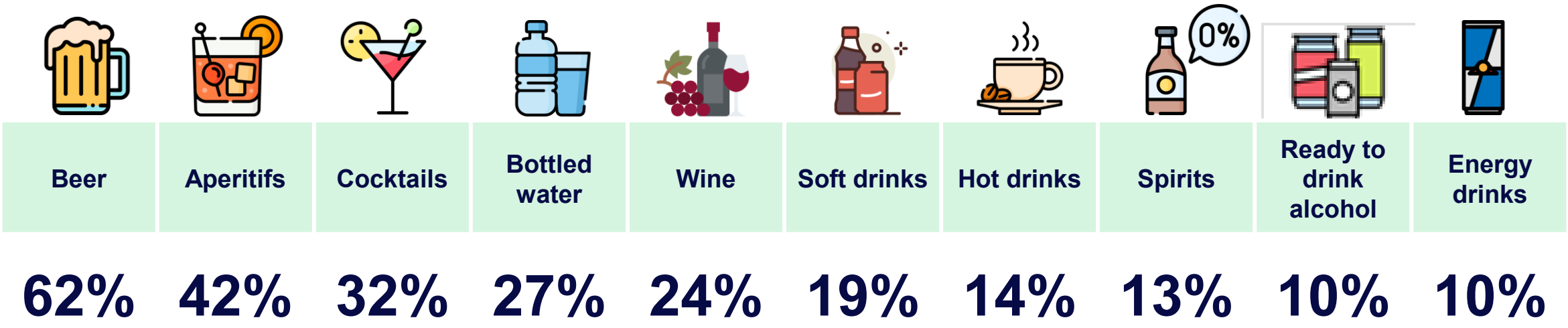
29%

Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 231

WHAT DO YOU PLAN TO DRINK WHEN VISITING THESE VENUES TO WATCH THE 2026 FIFA WORLD CUP?

Asked to those who plan on watching in On Premise

Top 10 drink categories consumers plan to consume when watching the World Cup



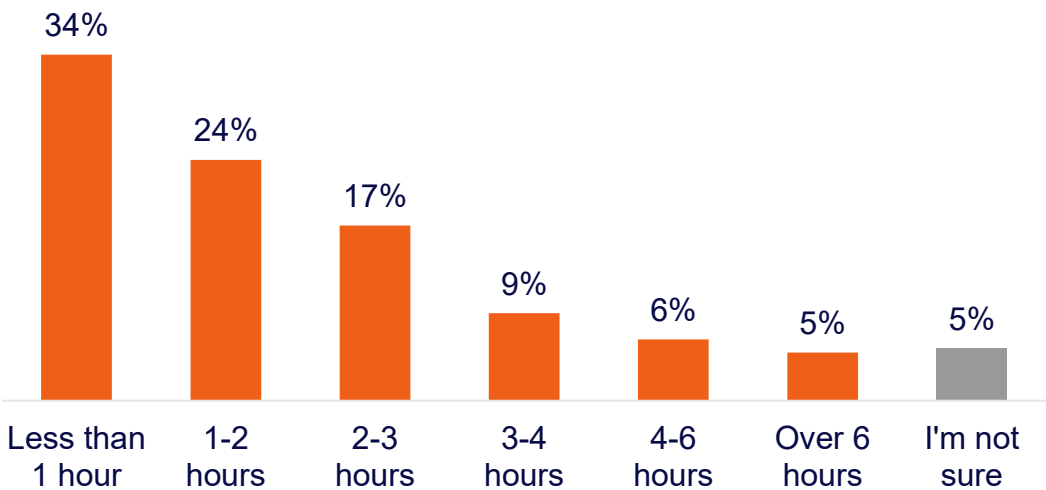
Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 231

HOW LONG DO YOU PLAN ON SPENDING IN BARS, RESTAURANTS OR SIMILAR VENUES TO WATCH THE 2026 FIFA WORLD CUP?

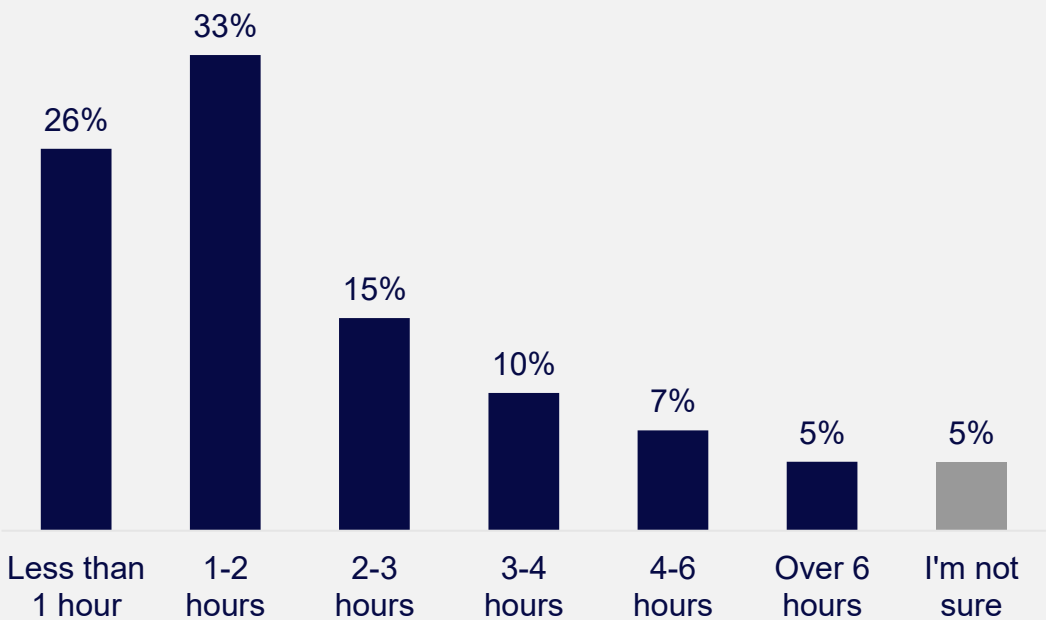
Asked to those who plan on watching in On Premise

Length of time consumers plan to spend in venues...

Before a game



After a game



Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 212

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CGA: Consumer Tools

Additional Consumer Reporting where CGA by NIQ's expertise can be leveraged



Custom RFP Support Decks

Take group-specific sales stories to your national account customers to speak to their consumers and showcase how your portfolio aligns with their strategies



Consumer Segmentation

Strategically and effectively target specific On Premise drinkers to identify offerings and opportunities that relate to them, ensuring \$ are spent more effectively in On Premise brand building



Optimum Assortment

CGA's assortment tool allows you to enable your teams 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 Research

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



Path to Purchase

Understand the decision corridor consumers go through when purchasing products, and identify how these choices impact the decisions that result in final sales



Bartender Research

Bartenders and servers are the final touch point of influence in the channel. With such change, understanding advocacy and bartender needs is extremely important in influencing the sales of your products

Find out how build a successful On Premise strategy

For more information on how CGA by NIQ can help your business grow in the Italian On Premise, get in touch:



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