



Think Global. Win Local.

The Global Playbook for winning in the On-Premise

REACH 2026





What sets us apart?

We don't just report on the market—we help you **lead** it

Supporting our clients to achieve growth

NIQ empowers decision-makers across the food and beverage industry - from suppliers and brand owners to wholesalers, government bodies, and hospitality operators - to shape a thriving, data-driven future for the On-Premise channel.

Measure the market...



and track your sales performance
against your competitors

Win with consumers...



in On Premise channels and occasions
by knowing how to influence path to
purchase and brand choice

Grow distribution...



by identifying and targeting the outlets in
the channels with the greatest sales and
consumer opportunities for your brands

Gain a tactical advantage...



with outlet level sales, pricing and
ranging analytics combined with
consumer insights

Essential Insights: Global On-Premise Behaviour & Engagement



REACH: On-Premise global study

REACH is a global study of consumer behaviour in the eating and drinking out sector.

Exploring topic areas to help brands align strategies to local market opportunities, including:

- **On-Premise sentiment and habits**
- **Drink choices and drinks trends**
- **Accessible luxury**
- **Moderation**
- **Social Media and Path to Purchase**
- **Health & Wellness**
- **Cost of Living**



Data-driven analysis and expertise

The global study collates over 34,500 consumer survey responses across 46 markets, making it the biggest and most comprehensive study yet for the On-Premise.

Analysed and delivered by sector experts, it delivers insights to help brands and manufacturers identify and leverage opportunities for the unique channel.

Designed with consistent structure and delivered annually, it's ideal for benchmarking and trending across markets and categories.



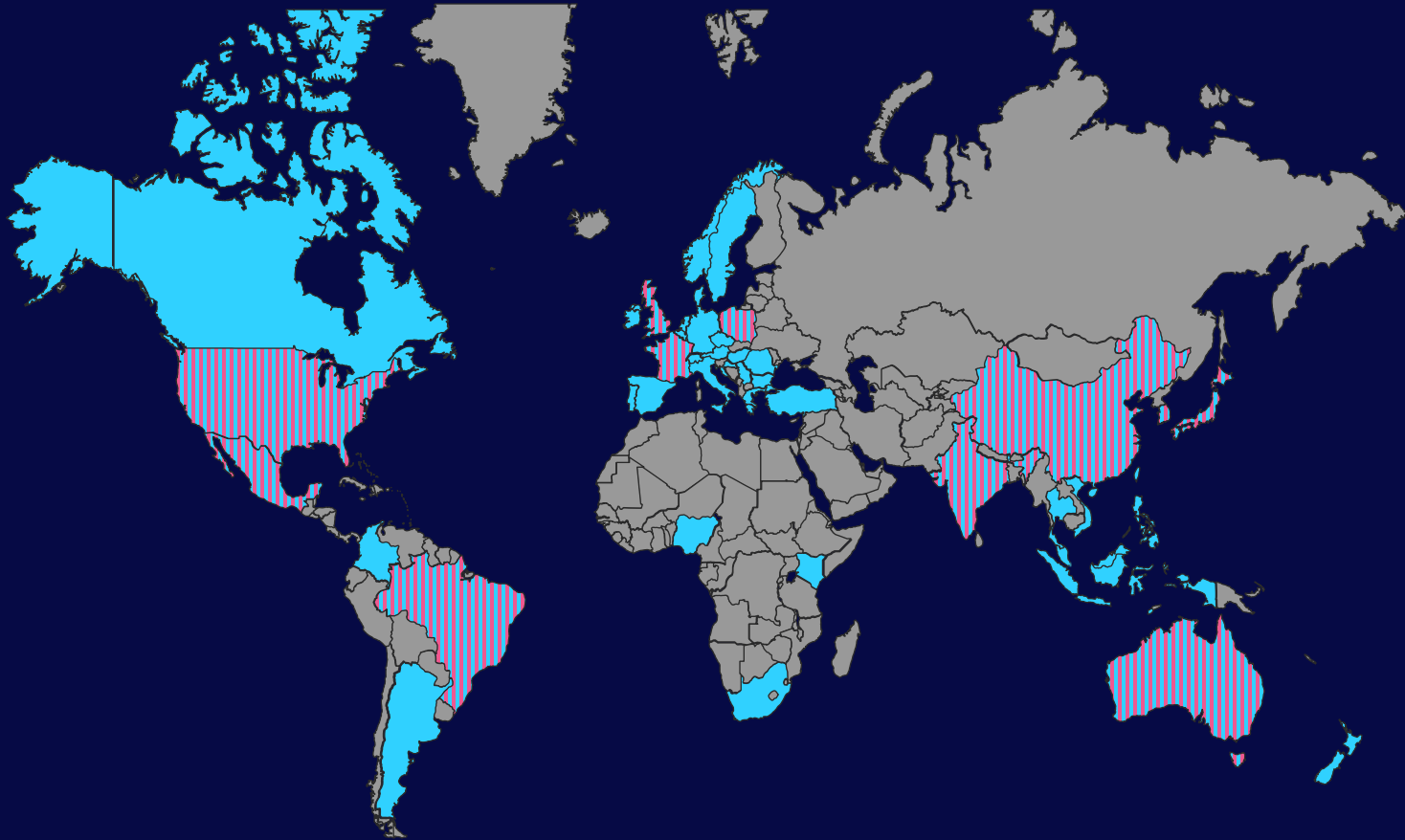
Optimize On-Premise strategies

Staying at the forefront of trends, REACH enables brands navigate challenges and how to win globally and locally.

- **Make insight-driven decisions to inform global strategies**
- **Understand changing consumer dynamics to identify emerging opportunities**
- **Tailor marketing, brand and sales strategies to compete effectively**
- **Uncover what drives consumer choices to optimize trade investment and marketing**

REACH Global Coverage

Global insight from 46 countries, 34,500 On-Premise consumers
15-minute online survey with On-Premise users, nationally representative of age, gender and region



Consumer research conducted in:

Argentina	Hong Kong	Poland
Australia	Hungary	Portugal
Austria	India	Romania
Belgium	Indonesia*	Serbia
Brazil	Ireland (ROI and NI)	Singapore
Bulgaria	Italy	South Africa
Canada	Japan	South Korea
China	Kenya	Spain
Colombia	Malaysia*	Sweden
Croatia	Mexico	Switzerland
Czechia	Netherlands	Taiwan
Denmark	New Zealand	Thailand
France	Nigeria	Turkey
GB	Norway*	US
Germany	Philippines	Vietnam
Greece		

Operator research conducted in:

Australia	GB	Mexico
Brazil	Poland	South Korea
China	India	USA
France	Japan	

REACH 2026: Understanding what drives consumer choice today

Standard demographic questions & tracking On-Premise behaviour and engagement

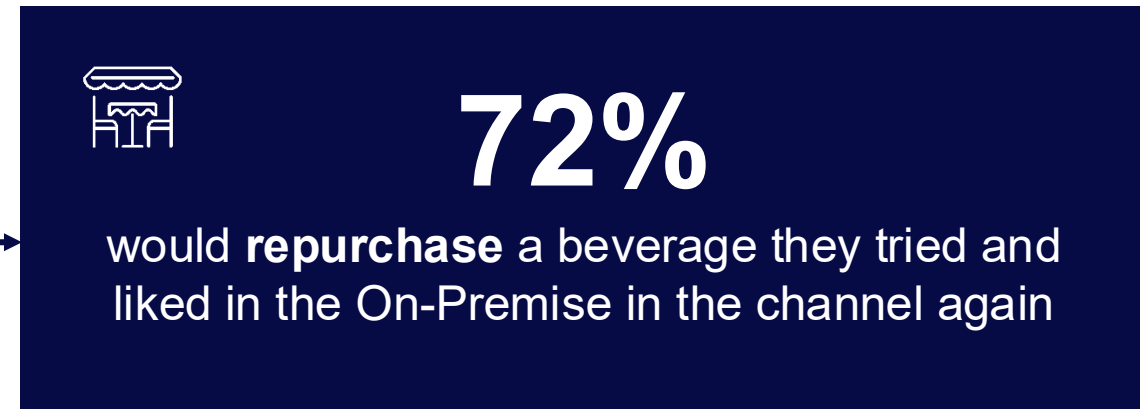
On-Premise Habits	On Premise Sentiment	Cost of Living	Drink Choices	Food & Venue Choices
- Demographics - Personal values & Hobbies - On Premise engagement - Key channels & occasions - Deep dives into High Tempo, Late night & Events	- Attitudes to the On Premise & what it means to consumers - Need states for visiting the On Premise - Future planned frequency of visits	- Perceived impact of Cost of living - Changes to disposable income and optimism for the coming year vs. 2025 - Changes to behaviour due to cost-of-living pressures	- Category consumption - Top flavour profiles by category - Key attributes / qualities driving drink choices - Drivers of trade-up - RTD deep dive	- Drivers to venue choice - Dayparts and days of the week - Consumer loyalty to venues & drivers
Food & Drink Trends	Moderation & Low alcohol	Price Sensitivity & treating	Social Media, AI & the P2P	Health & Wellness
- Awareness and trial of emerging drink trends - More important food qualities vs 1 year ago - Dietary preferences - Write-ins on top trends	- Frequency of alcohol consumption at home and when in the On Premise - How consumers are moderating - Impact of ABV & Opportunities for Low alcohol	- How consumers try to treat themselves - Consumer reaction to increased prices on purchasing habits - Drivers and perceptions of value by category	- Top influencers on the consumer P2P - Influencer fatigue & who consumers trust recommendations from - Usage of AI for On Premise decision making	- The importance of health when in the On Premise - The impact of social perceptions on health appeal - Usage of weight loss drugs & Impact on On Premise habits and drink choices

The On-Premise serves as a key discovery channel, where consumers trial new products – driving not only on trade engagement but also influencing off trade purchase behavior

EXAMPLE
OUTPUT

Consumers regularly try different drinks in the On-Premise

Which translates to significant On and Off Trade consumption

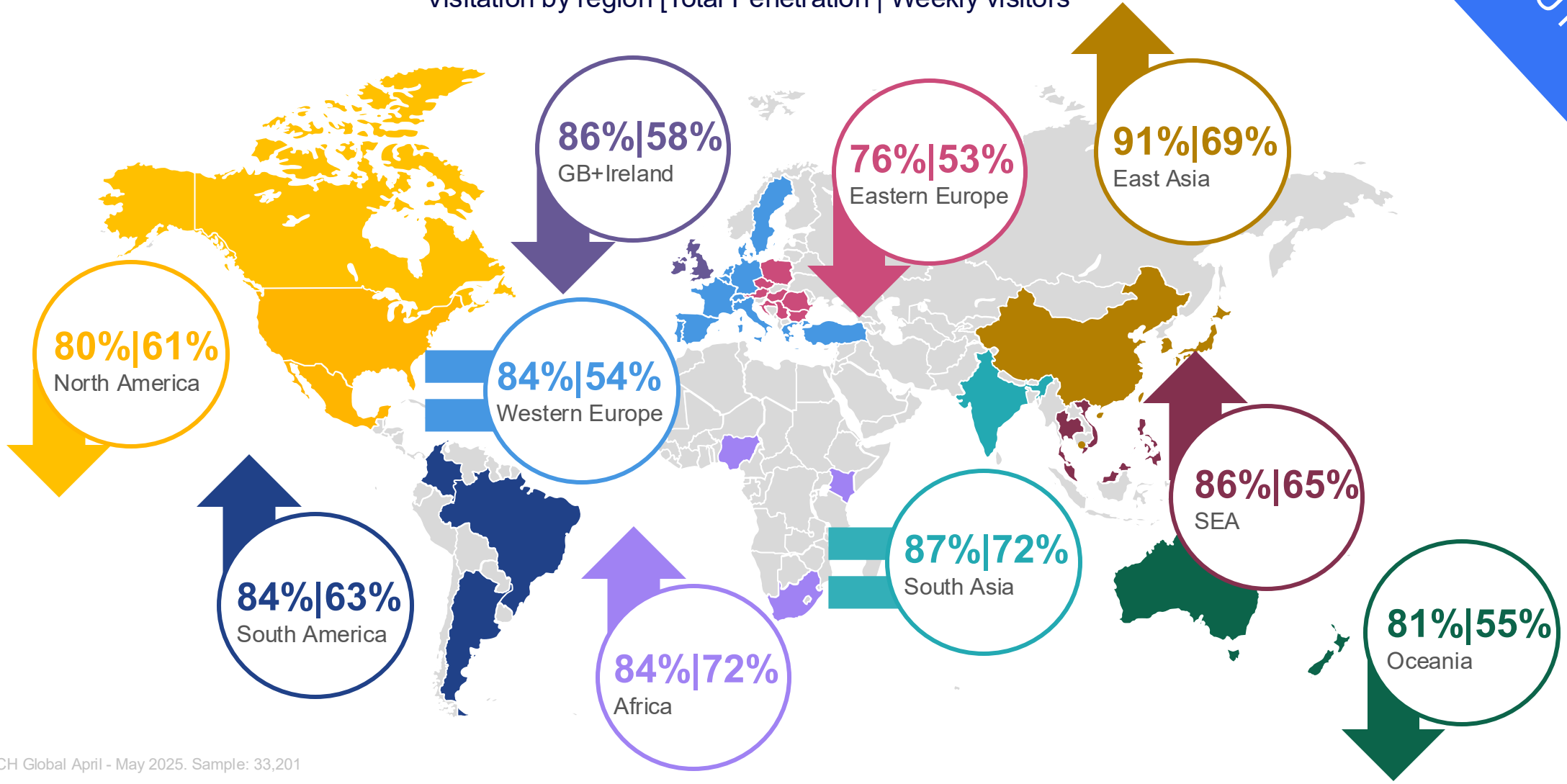


Source: CGA by NIQ Global REACH 2025; CGA by NIQ REACH 2025 China, GB, India, Italy, GB, Spain, Vietnam, sample size: 677 – 32,064

The On-Premise cannot be approached as a singular global entity, as is significant nuance at a market level, with the establishment and trajectory of different regions and countries

EXAMPLE
OUTPUT

Visitation by region [Total Penetration | Weekly visitors]



Source: CGA REACH Global April - May 2025. Sample: 33,201

There are
3.4%

fewer
global On-Premise visits
2025 vs. 2024

**Sales and trading days
are more concentrated
around key dates**

The top 10 most valuable
days of 2024 made up

+5pp

more of the yearly total sales
than in 2023

**But the volume of
occasions is shifting to
routine visits**

There has been a

6%

increase in share of visits for
lower-tempo, routine visits
over the past 12 months
(53% vs. 47%)

EXAMPLE
OUTPUT

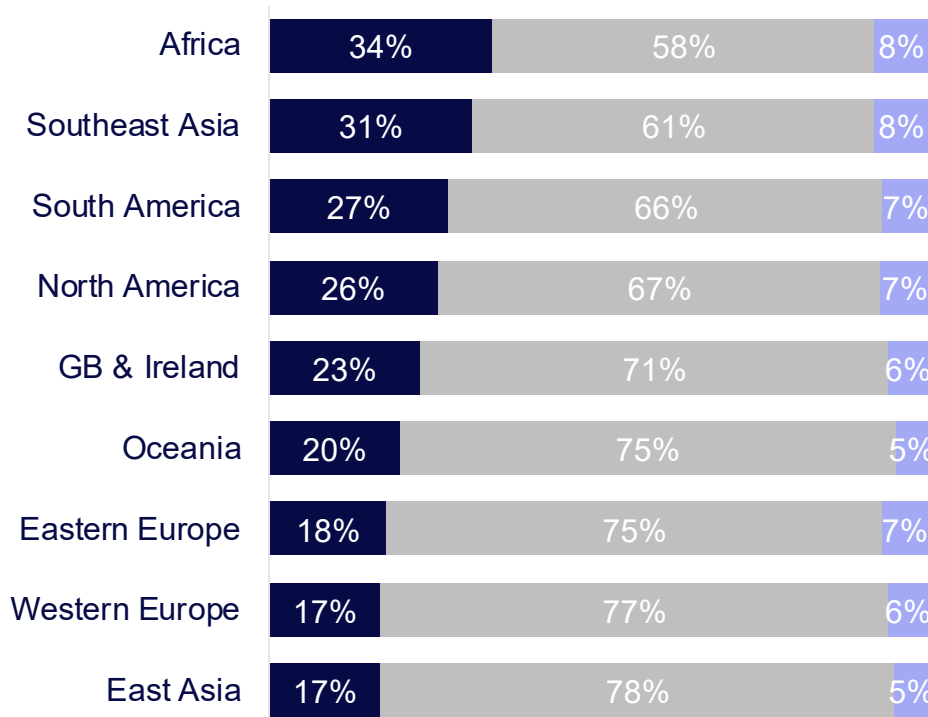


As consumer habits shift across the globe, visits to the hospitality sector are shifting towards earlier day parts, on both food and drink-led occasions

EXAMPLE
OUTPUT

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

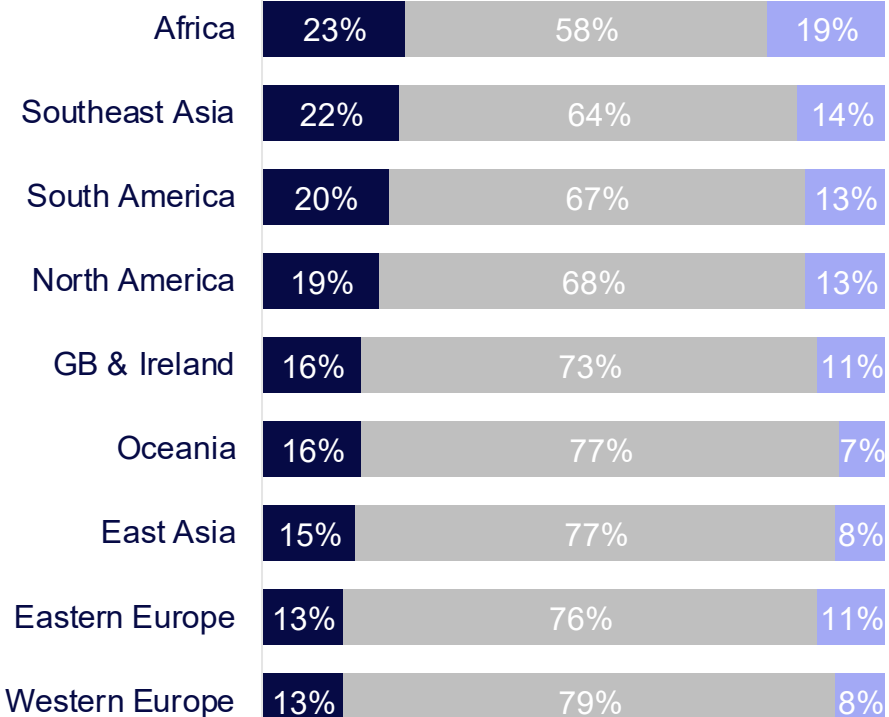
To eat



Earlier

The same

To drink



Later

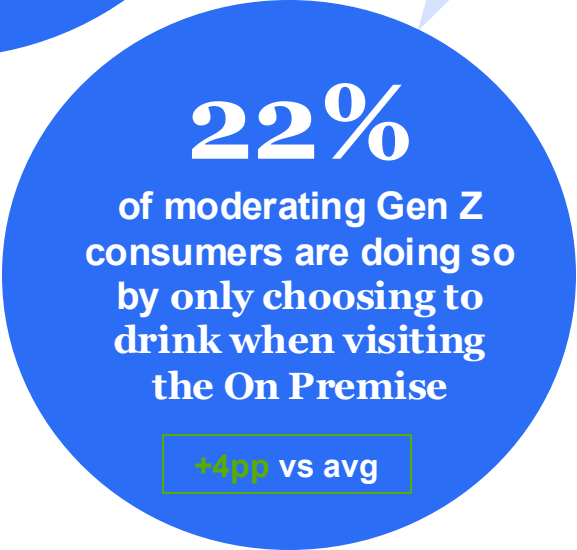
CGA Global REACH May 2025. Sample: GB&Ireland: 1751, Western Europe: 8532, Eastern Europe: 5784, North America: 3002, South America: 2541, Oceania: 1250, Africa: 1775, East Asia: 4297, South East Asia: 4261

While Gen Z are not solely responsible for the rise of mindful drinking, they exemplify deliberate and purposeful consumption and the On Premise is the ideal setting that aligns with their intentional approach

EXAMPLE
OUTPUT



I'm a social drinker, so I'm probably only going to drink when my friends are with me. I'm probably not going to do that if I was on my own... that's where I moderate my consumption."
Gen Z consumer



Top 3 occasions Gen Z choose to drink alcohol

#1	For a special occasion or celebration	35%
#2	When going out to bars / restaurants	32%
#3	At the weekend	32%

Top 3 motivations for Gen Z choose drinking less alcohol

#1	To improve my health and well-being	28%
#2	To save money	26%
#3	To be a better version of myself	22%

Source: CGA REACH Global April - May 2025. Sample: 5,120 – 33,186

Global insights and strategic local execution

In today's dynamic On Premise market, understanding consumer behaviour is crucial to know the **Why** behind the **What**. The On Premise remains a key channel in which to reach consumers, drive trial and innovation and build brands that resonate with target consumers.

Trusted by leading drinks brands and manufacturers to develop winning global strategies in the On Premise – access the insights you need to accelerate your success.



Build global strategies that place your brands at the forefront of modern consumer choice.

Coming soon: Global REACH 2026 study



For local tactics and intelligence, dive into country-level analysis to reveal important demographic behaviour and nuanced engagement.

Coming soon: OPUS Lite country-level reports



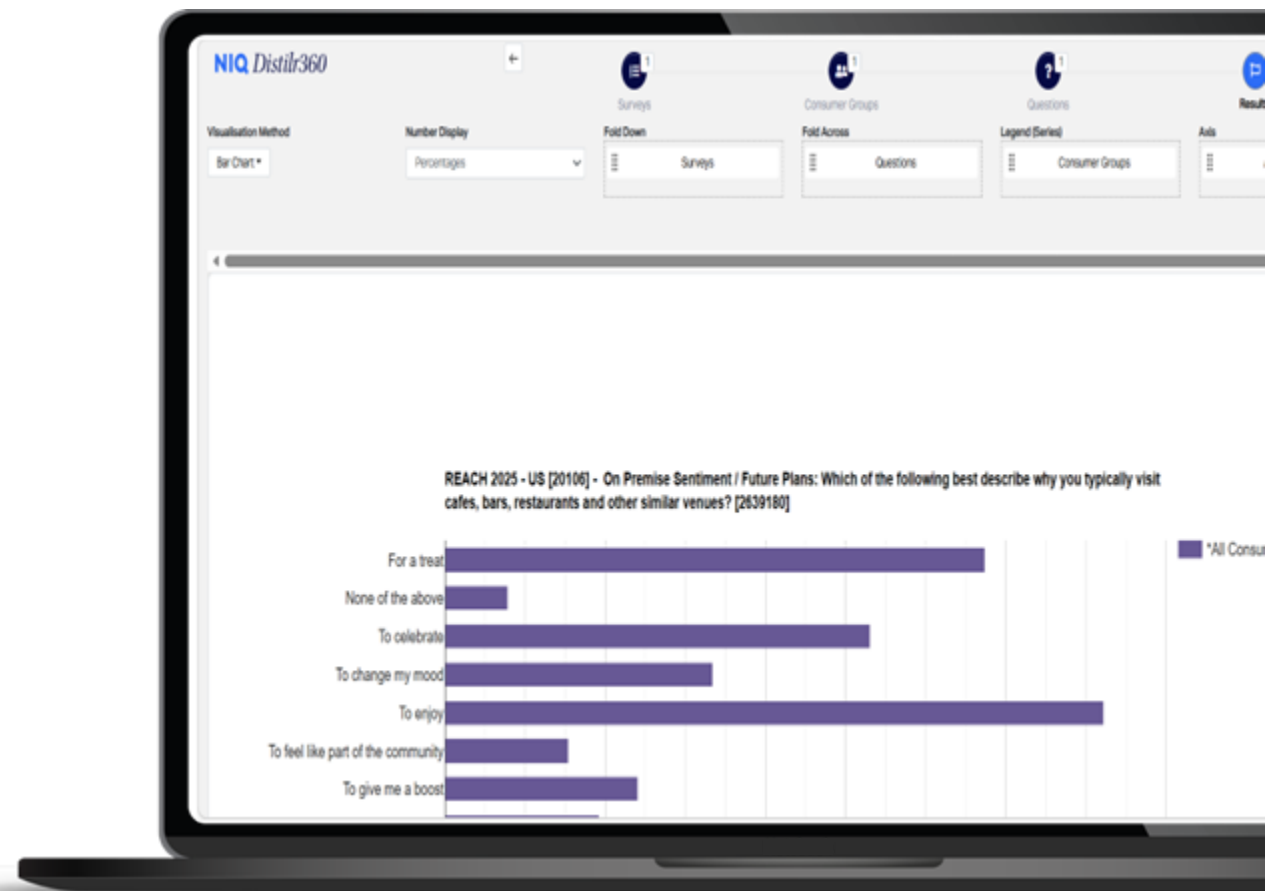
Consumer intelligence at your fingertips

Unlimited access to subscribed consumer data

NIQ Distilr360

A powerful consumer data analysis tool enabling you to access the answers to hundreds of questions across NIQ's On Premise consumer surveys, as well as custom research.

- ✓ Self serve data access
- ✓ Quickly and easily tailor consumer data to your business needs and/or specific custom questions in the survey
- ✓ Grant your strategic teams across analytics, insights, marketing and key accounts access to data that support their planning and sales stories
- ✓ Cut the data by consumer groups, demographic, brand or category drinker of your choice for hyper-granular understanding of consumer behaviour



Ready to supercharge your global On-Premise strategy?

Get in touch to learn more and access the latest insights for 2026

NielsenIQ

