ITALY ON PREMISE CONSUMER PULSE REPORT

CGA by NIQ, May 2024

SUMMARY: TOPLINE VISITATION & INTENTION

- Despite a decrease in food led visits last month, overall, On Premise visitation remains the same with time of year topping reasons to visit the On Premise more frequently, showcasing the importance of good weather conditions to encourage additional traffic to venues.
- The rate of delivery ordered also has seen a slight decrease with less consumers ordering compared to last month, particularly in the 18-34 category who are spending less
- When ordering drinks in a bar, café or restaurant consumers are mainly swayed by how their drink of choice matches the food ordered, whether what they typically drink is available, and what specialities and recommendations are made at the venue.
- Menus are also determinant of drink choice if it stands out on the menu, implying that there is a particular group of consumers more responsive to visual aids.
- Consumers mostly discover new drinks through the physical menu as well as through friends and family recommendations.
- When it comes to RTDs, only 24% of consumers have purchased them in the past 6 months, however, a sizable 53% are open to try them. Over 2 in 5 consumers who drink RTDs like to experiment with new RTD brands and flavours, highlighting the space for innovative recipes.
- Pre-mixed Cocktails and Hard Seltzers are the most drunk RTDs, whilst Alcopops do not capture the average Italian Consumer’s interest. RTDs are often purchased in bars, restaurants and café’s showcasing there is opportunity in the On Premise, particularly for Hard Seltzers and pre-mixed Cocktails.
- A shift towards a 4-day working week would encourage nearly 1 in 5 consumers to spend the additional free day going out for food or drinks.
- Adoption of Dynamic Pricing strategies will encourage nearly half of On-Premise consumers to stop visiting such venues, with 7 in 10 looking to avoid during peak hours to avoid higher pricing

CGA'S MONTHLY CONSUMER PULSE

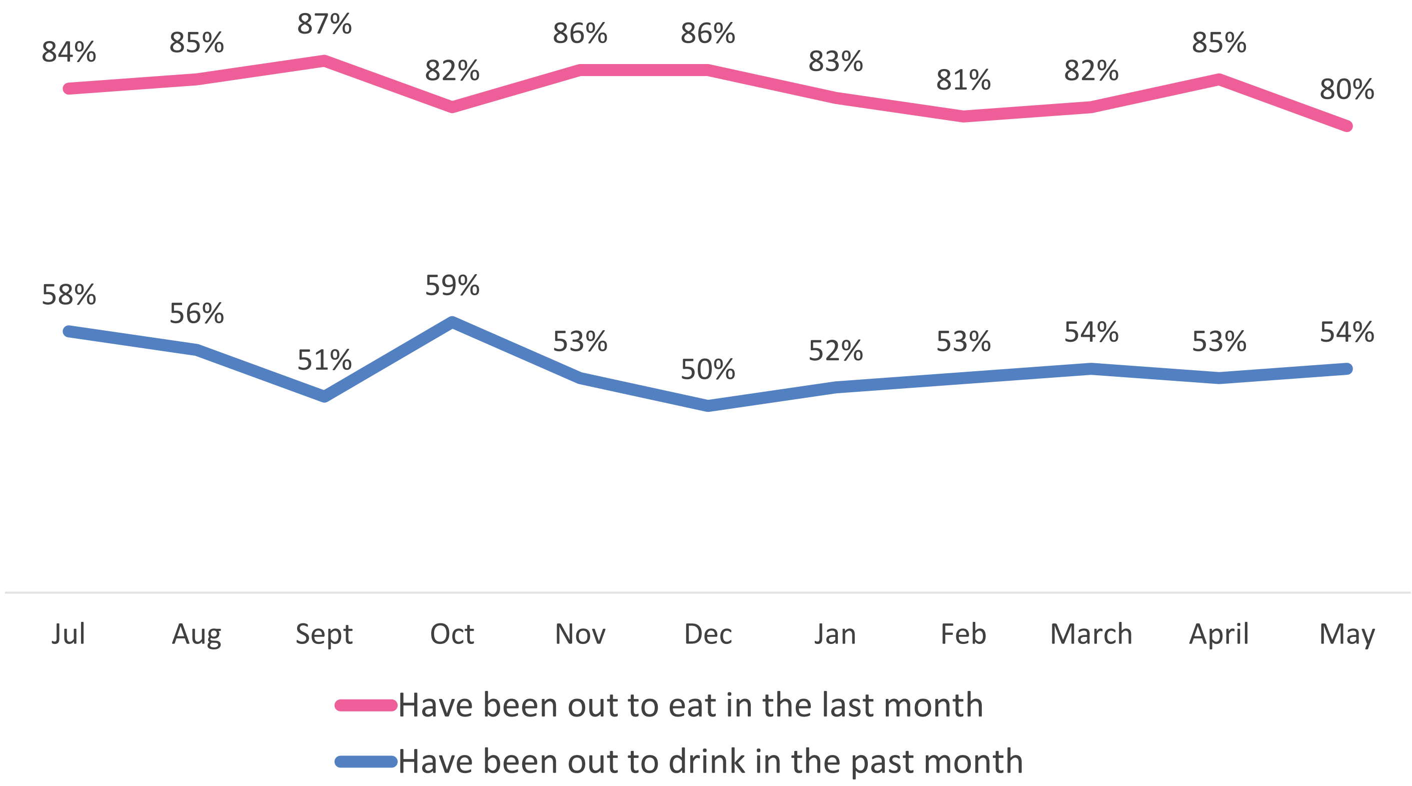
- This monthly On-Premise Consumer Pulse report is intended to capture consumers consumption patterns and how they fluctuate in the transition period from April 2024 to May 2024 in Italy.
- This study looks into consumer's On-Premise behaviour over the *past month* and tests visit intention for the *month 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 2024** issue, we surveyed over 774 consumers (aged 18+) between the 24th May – 30th May 2024. These consumers were situated across all Italy regions and must typically visit On Premise venues at least once within a 3-month period.
- This report touches upon hot topics including **path to purchase,** consumption of **RTDs** as well as the **4 day working week** and **dynamic pricing** within venues**.**

KEY METRICS / ON PREMISE VISITATION

LOOKING BACK

FREQUENCY VISITING THE ON PREMISE OVER THESE LAST MONTHS

Visits to the On Premise this month



97% of visitors visited the On Trade this month

=0pp vs April

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 774

VISITATION PLANS FOR THE ON PREMISE MONTH AHEAD

84%

Plan to go out to eat in the next month

-1pp vs April

57%

Plan to go out to drink in the next month

-1pp vs April

LOOKING AHEAD

__2%__ don't plan to visit the on premise __next month__

__-1pp__ vs April

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 774

HOW DOES YOUR CURRENT BEHAVIOUR COMPARE TO HOW FREQUENTLY YOU USUALLY GO OUT?

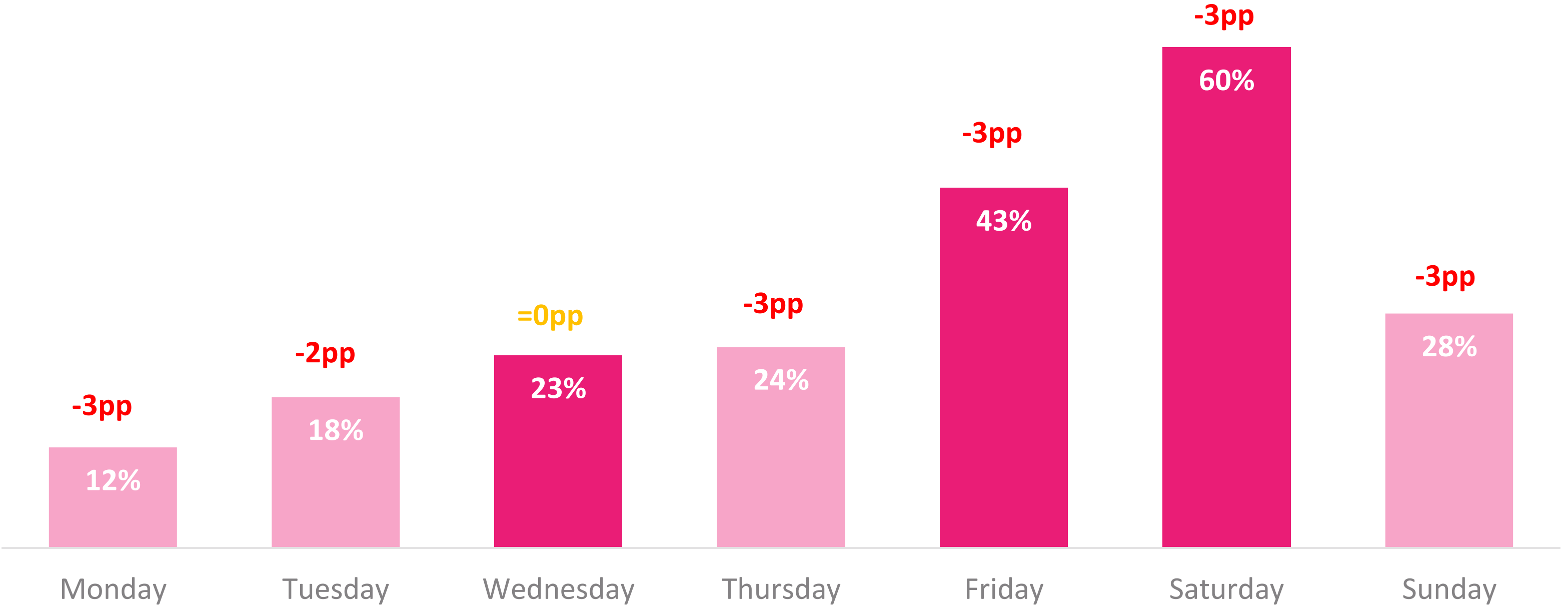
Change in frequency of visitation

29%	44%	26%
Going out more often	Going out the same	Going out less often
=0pp vs April	-1pp vs April	=0pp vs April

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 774

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

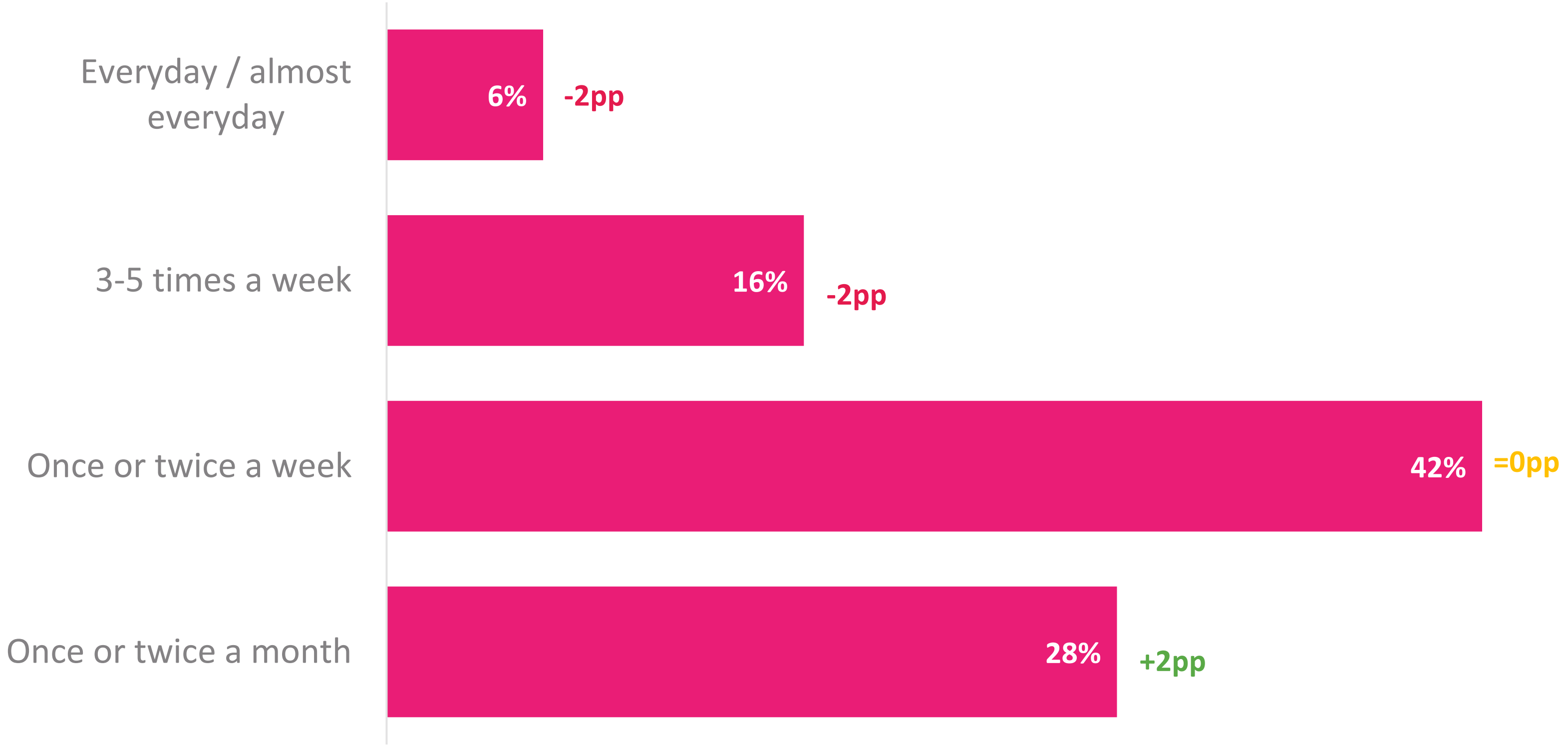
Days of the week visited (vs April)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 748

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

Visiting habits (vs April)

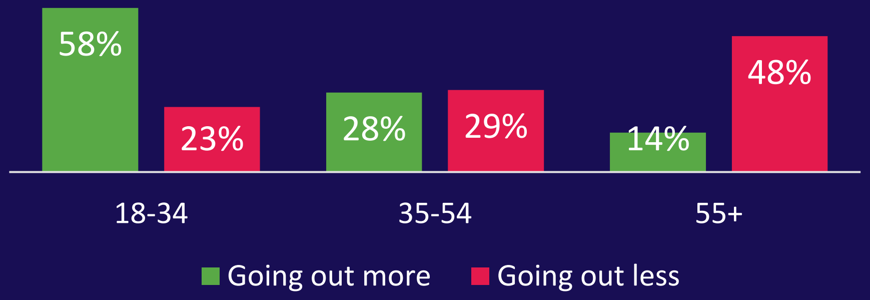


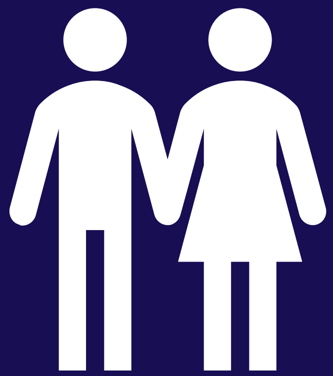
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 748

Those visiting the on premise more frequently than usual are typically younger, more likely to be located within the city / town centre and with a lower average household income than those who are visiting less often

Going out more | Going out less

Age groups





Gender

♂ 46% 45%

♀ 54% 55%

Location of residence

76% 64%

City centre / town centre

24% 36%

Rural / suburban

Average household income

€38,793

€31,694

Typically visits the On-Premise…

	Going out more	Going out less
At least weekly	81%	42%
At least monthly	99%	83%

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SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 202, 228

54%

Of Gen Z are going out more often **this** month

+25pp vs average consumer

36%

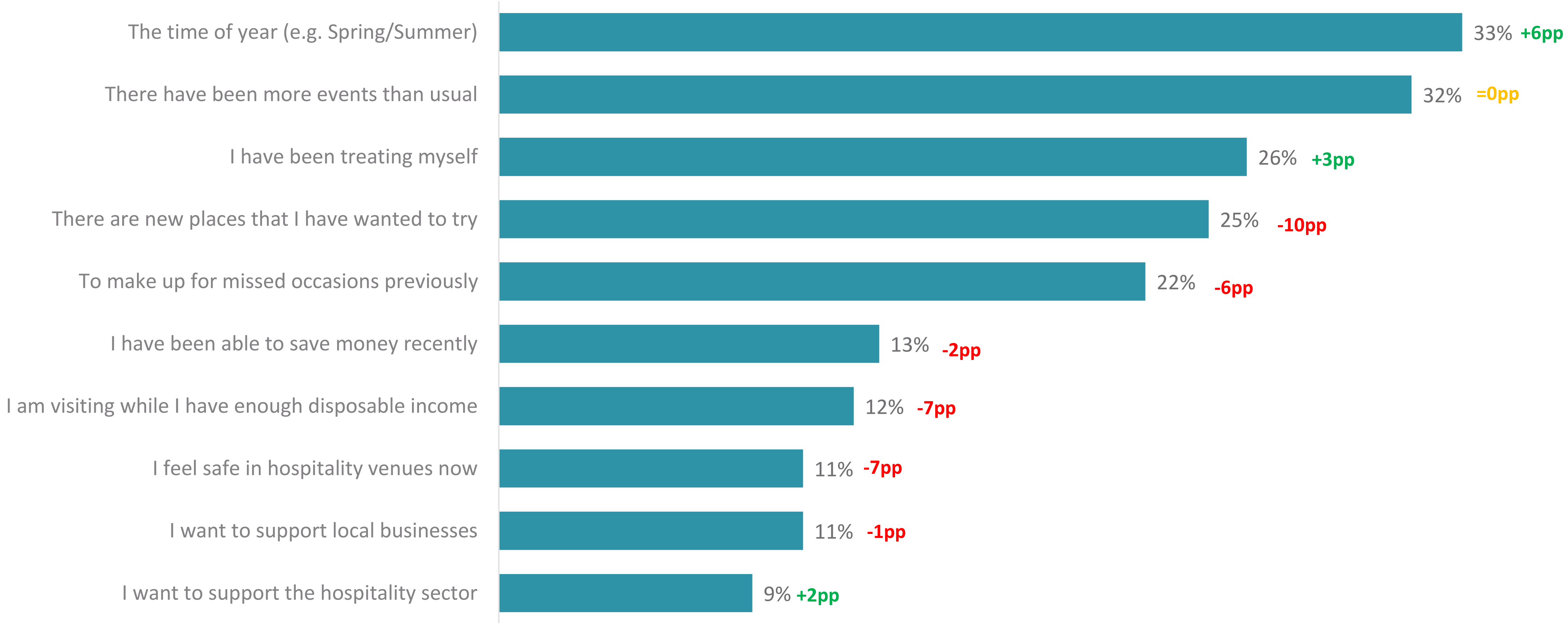
Of Gen Z are spending more overall on eating and drinking out this month

+6pp vs average consumer

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 182, 748

YOU HAVE SAID THAT YOU ARE CURRENTLY GOING OUT MORE FREQUENTLY THAN USUAL, WHY IS THIS?

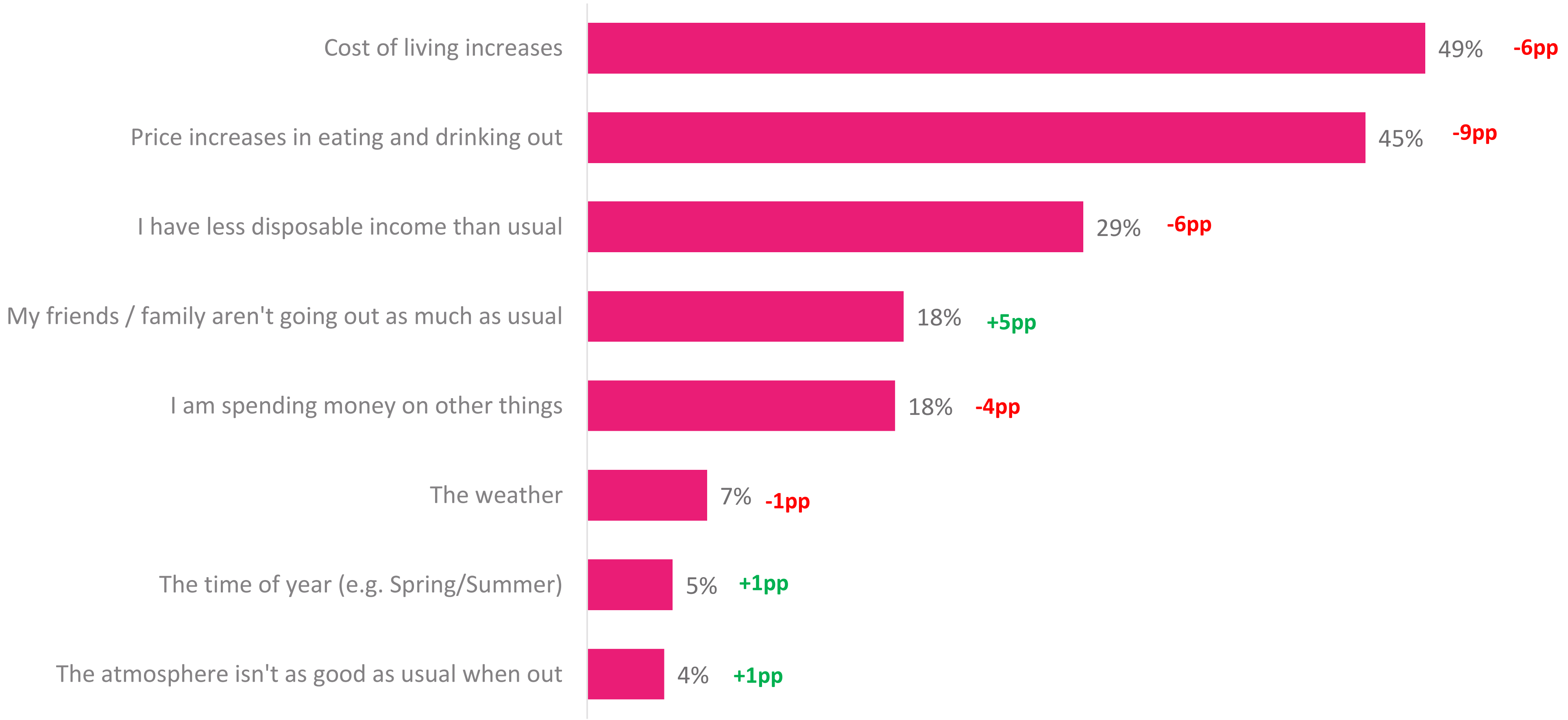
Reasons for going out to the on premise more frequently than usual (vs April)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 228, 218

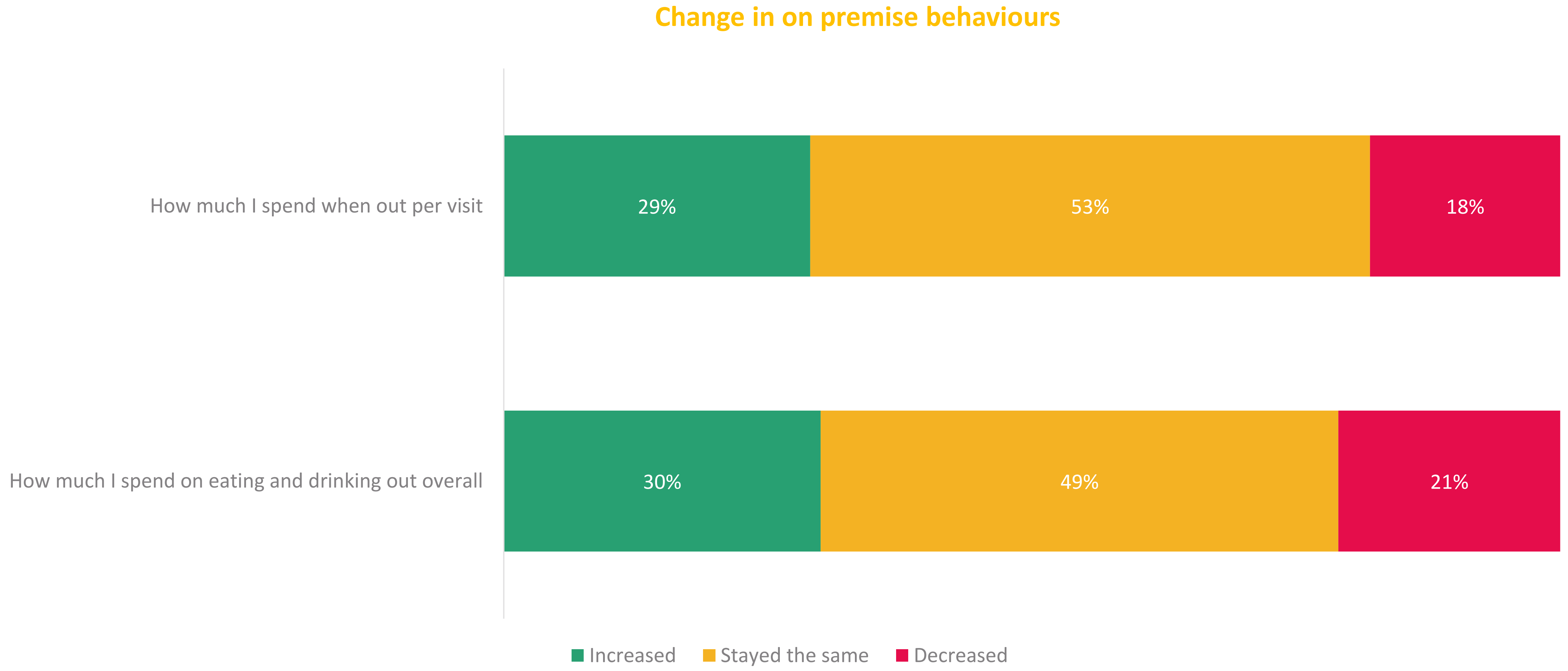
YOU SAID THAT YOU ARE CURRENTLY GOING OUT LESS FREQUENTLY THAN USUAL, WHY IS THIS?

Reasons for going out to the on premise less frequently than usual (vs April)



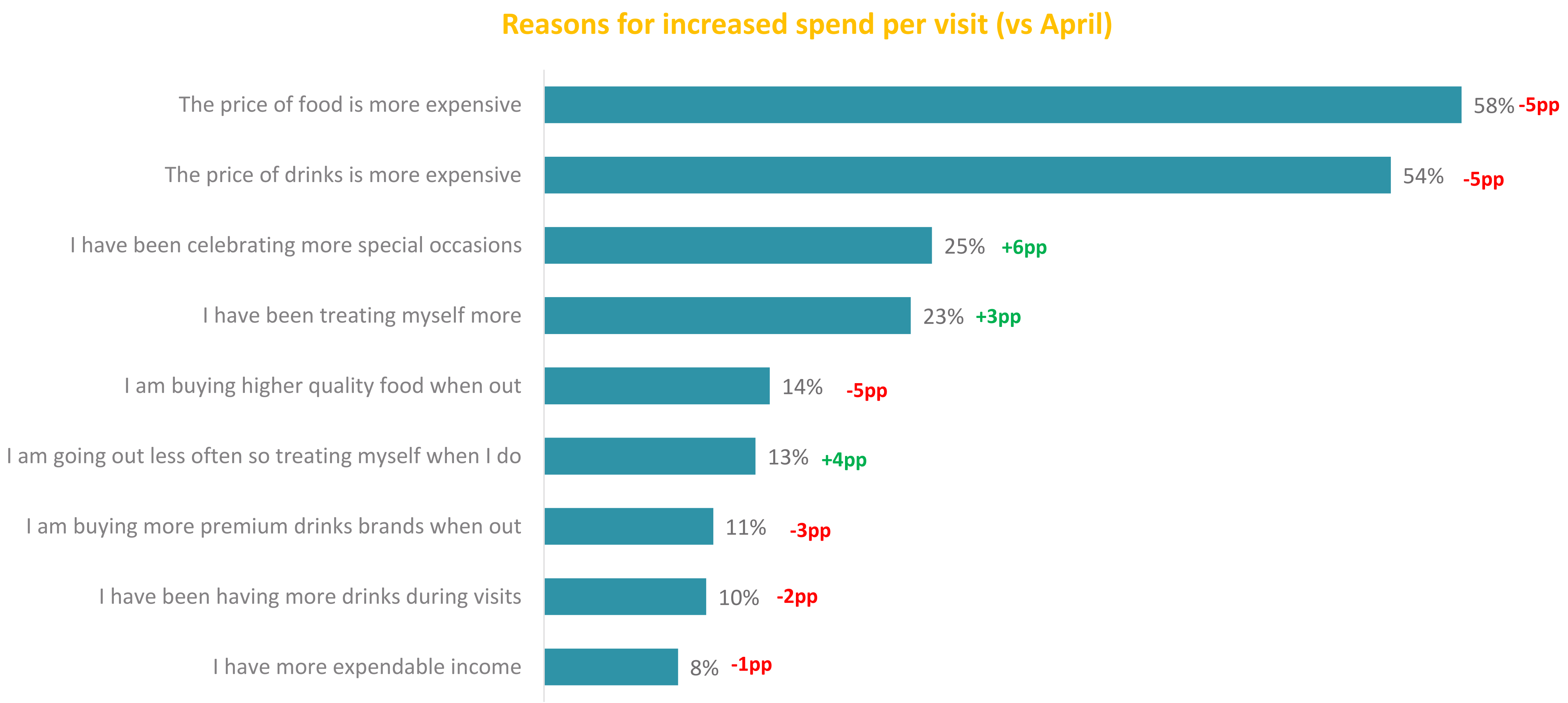
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 202

HAVE YOU CHANGED YOUR BEHAVIOUR IN ANY OF THE FOLLOWING WAYS OVER THE PAST MONTH, COMPARED TO USUAL, IN BARS, RESTAURANTS AND SIMILAR VENUES?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 774

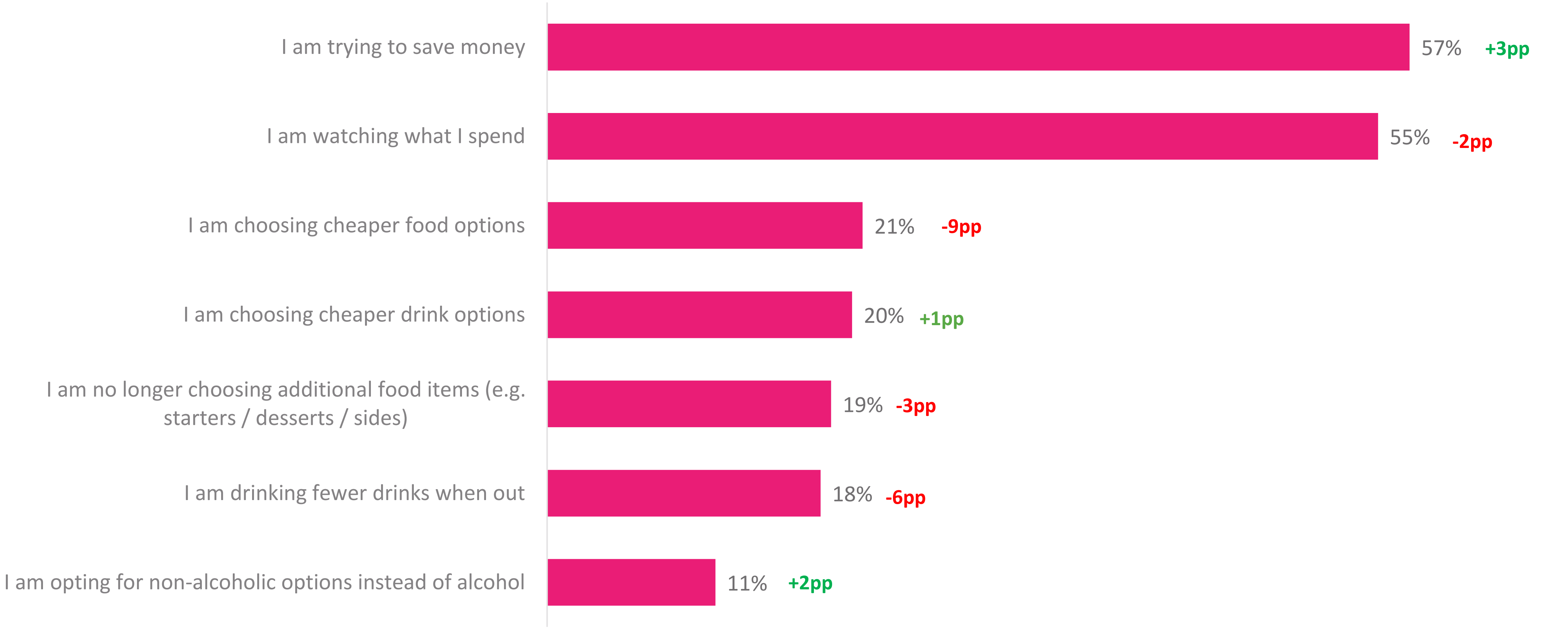
WHICH IF ANY OF THE FOLLOWING ARE REASONS WHY YOU ARE SPENDING MORE NOW WHEN OUT PER VISIT IN BARS, RESTAURANTS AND SIMILAR VENUES?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 224, 226

WHICH IF ANY OF THE FOLLOWING ARE REASONS WHY YOU ARE SPENDING LESS NOW WHEN OUT PER VISIT IN BARS, RESTAURANTS AND OTHER SIMILAR VENUES?

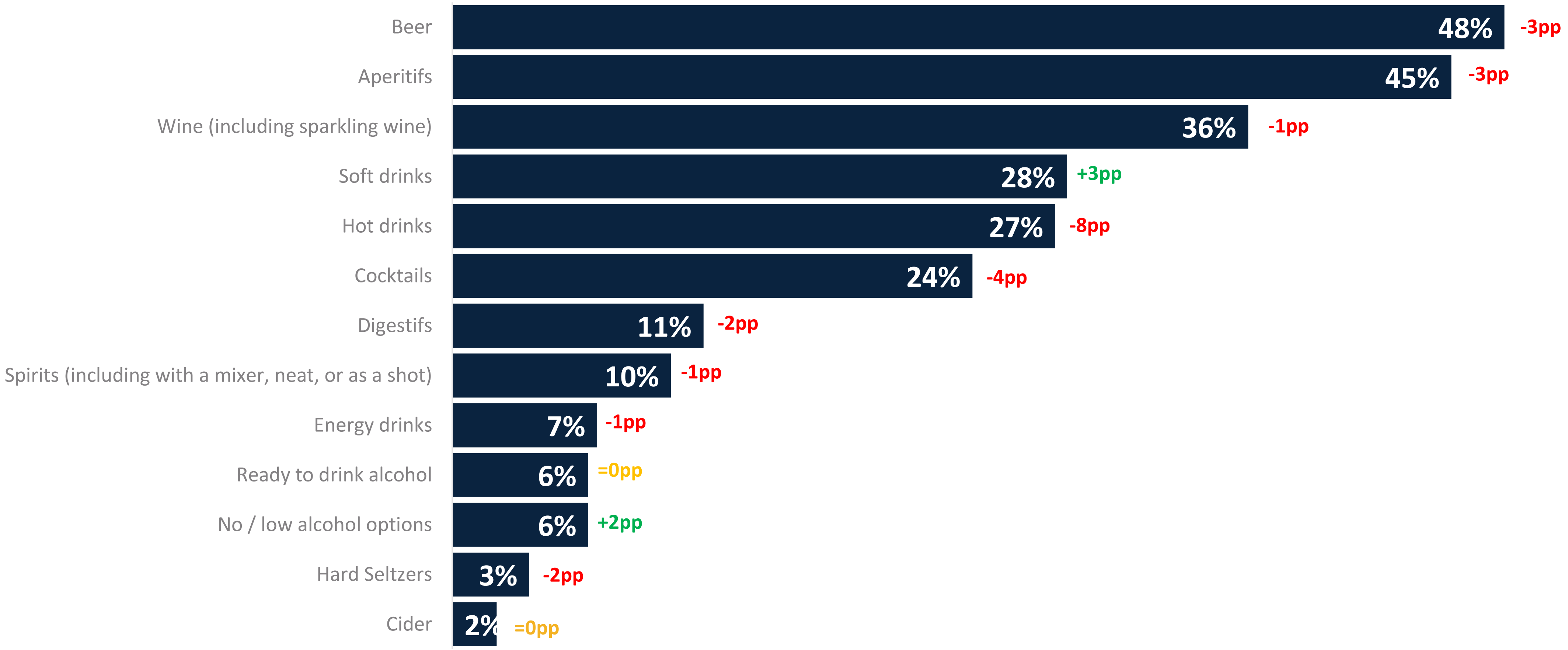
Reasons for decreased spend per visit (vs April)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 143, 142

WHICH OF THE FOLLOWING HAVE YOU HAD IN BARS, RESTAURANTS AND SIMILAR VENUES IN THE PAST MONTH?

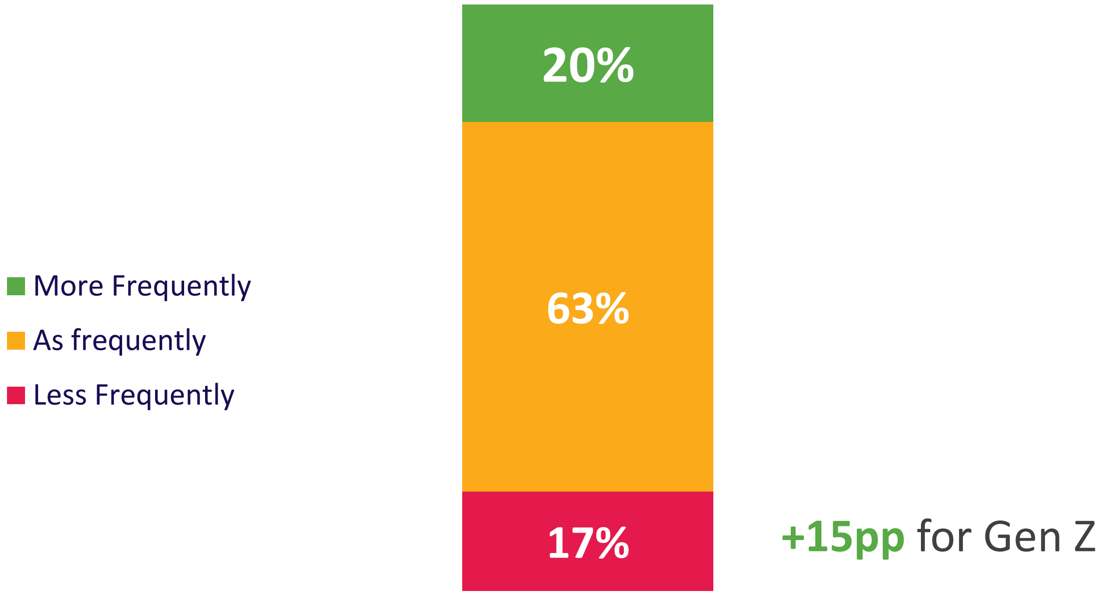
Drink choice of those who have visited the On Premise in the past month (vs April)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 748, 736

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

Frequency of planning to visit bars, restaurants or other similar venues over the next month



Tracking delivery consumption

61%

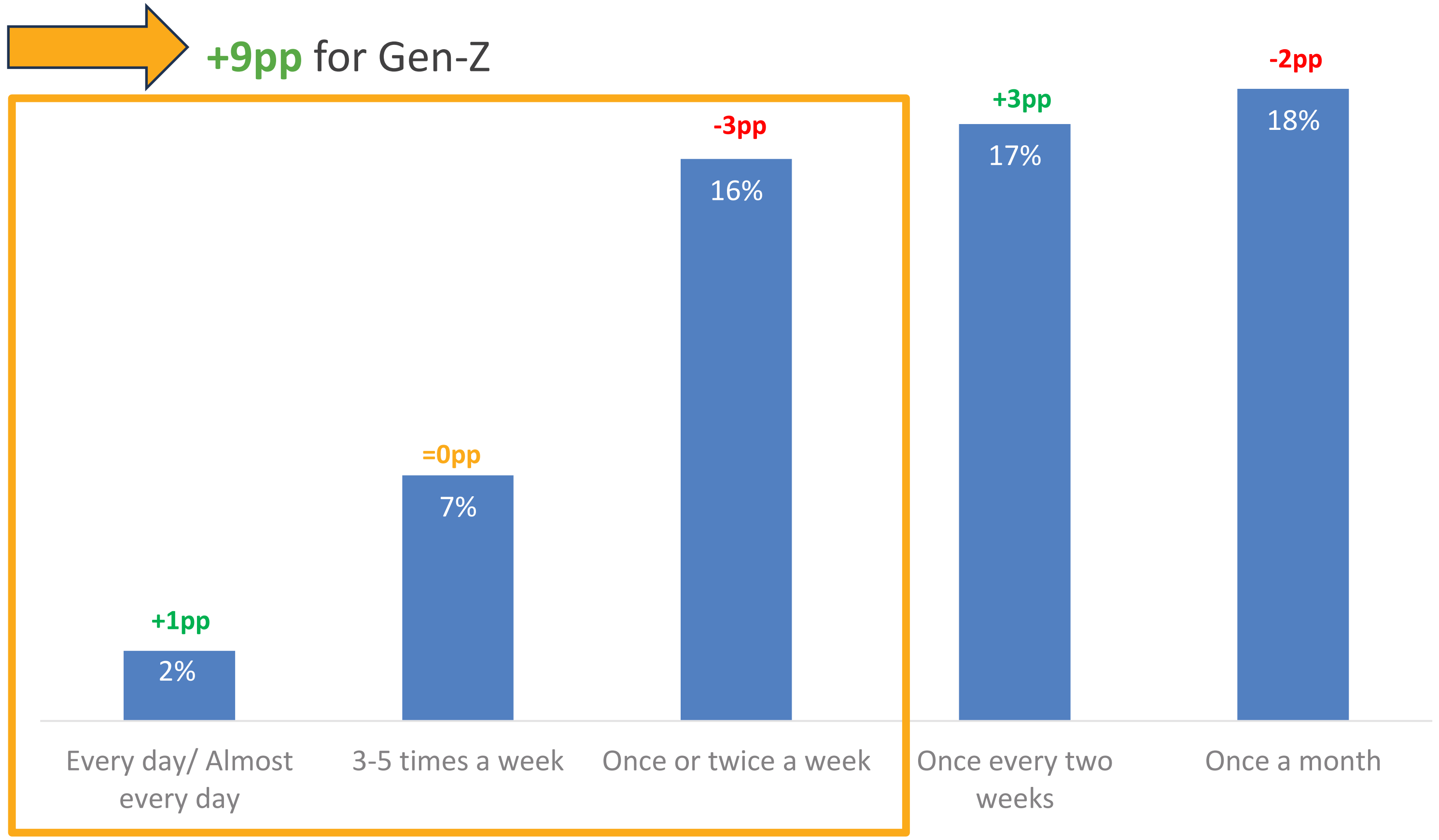
Of Consumers have ordered delivery in the past month

-1pp vs last month

20% Have not ordered delivery this month
20% Never order delivery

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 774

HOW OFTEN HAVE YOU ORDERED DELIVERY / TAKE AWAY IN THE PAST MONTH? (EX. DELIVEROO, UBER EATS)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 774, 182

YOU HAVE SAID YOU HAVE ORDERED DELIVERY IN THE PAST MONTH, HOW MUCH DO YOU USUALLY SPEND ON DELIVERY EVERY MONTH?

45€

Average Spend on delivery
a month for all consumers

	Consumers aged 18-34	Consumers aged 35-54	Consumers aged Ages: 55+
Average Spend on delivery a month	48€	47€	39€
Change from last month	-10€	-2€	=0€

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 125 - 473

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Hot topic:
Path of Purchase

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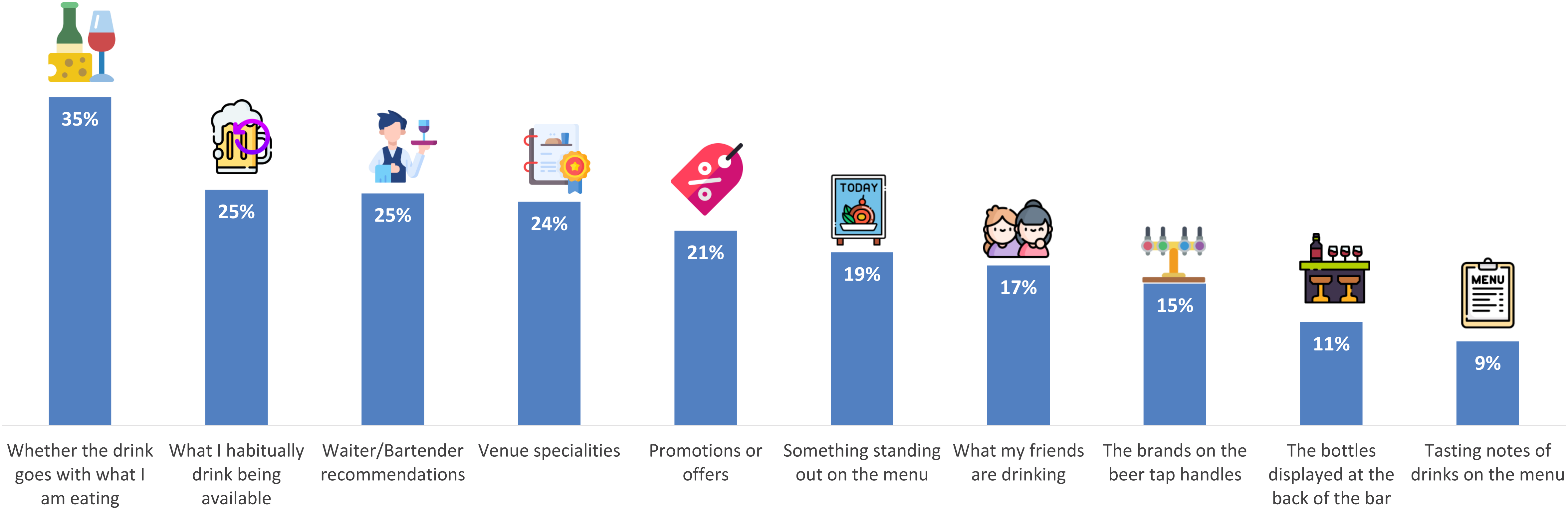
WHEN ORDERING DRINKS IN A BAR OR RESTAURANT WHICH OF THE FOLLOWING INFLUENCE WHAT DRINKS YOU ORDER?

What influences consumers when choosing drinks



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 774

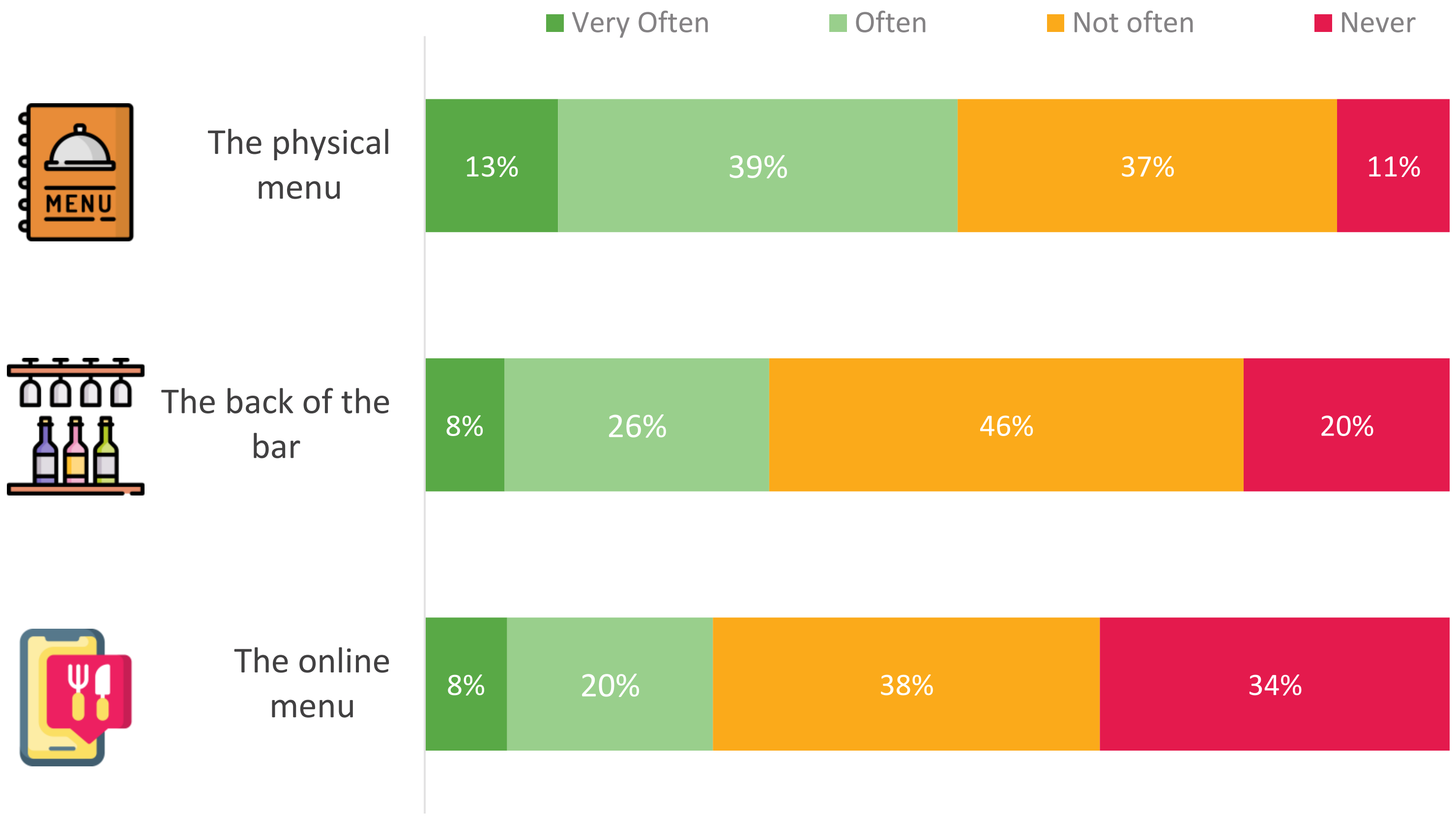
WHICH OF THE FOLLOWING INFLUENCES YOUR DRINKS SELECTION THE MOST WHEN ORDERING DRINKS IN A BAR OR RESTAURANT?

What influences consumers the most when choosing drinks

23%	14%	10%	10%	9%
Whether the drink goes with what I am eating	What I habitually drink being available	Waiter and Bartender recommendations	Venue specialities	Promotions or offers

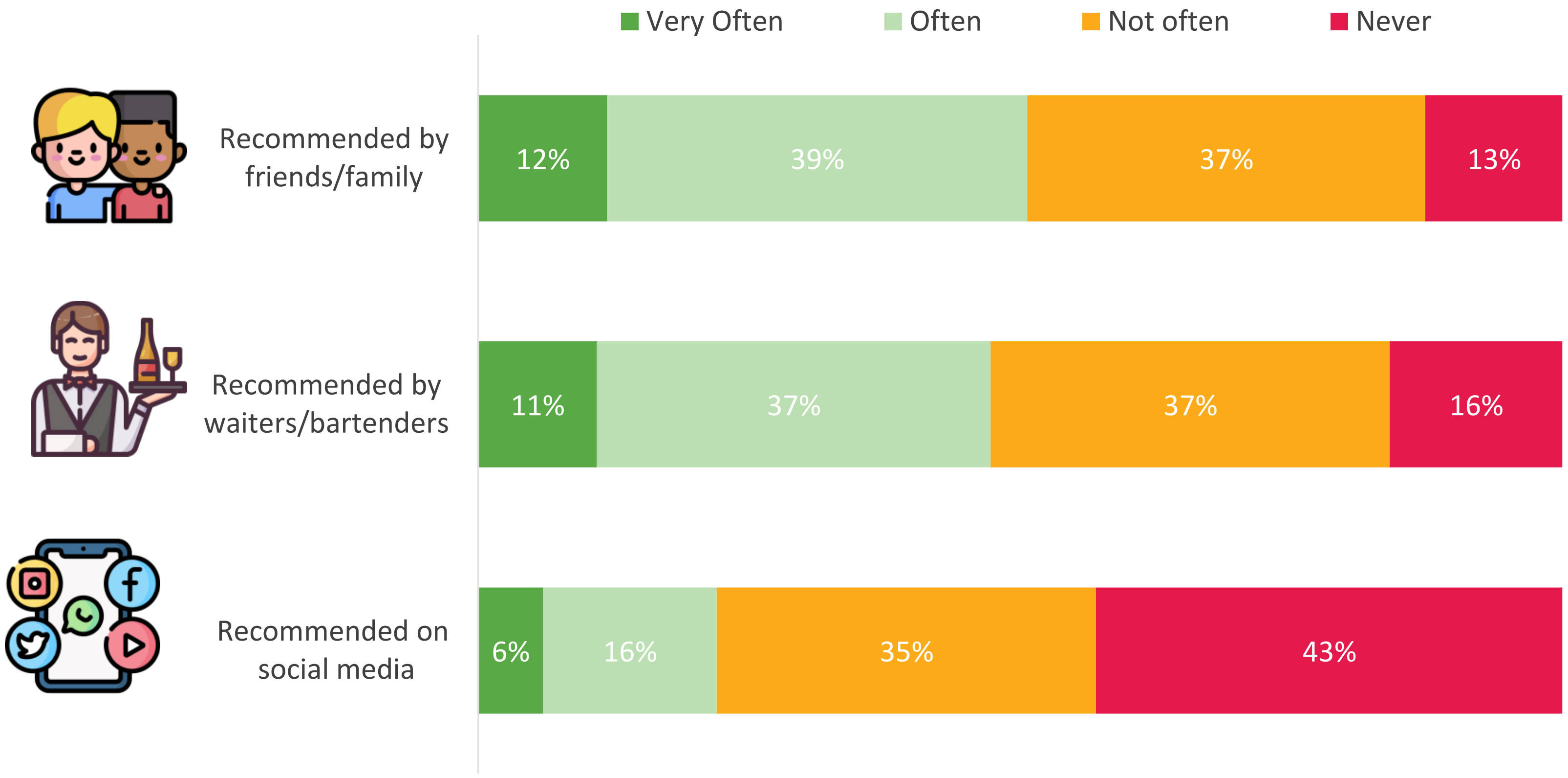
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 699

HOW OFTEN DO YOU ORDER NEW DRINKS YOU'VE NEVER TRIED BEFORE AFTER SEEING THEM ON...?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 763-766

HOW OFTEN DO YOU ORDER NEW DRINKS YOU'VE NEVER TRIED BEFORE AFTER HAVING THEM...?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 763-767

Hot Topic:
RTDs

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HAVE YOU PURCHASED RTDS IN THE PAST 6 MONTHS?

RTD consumption over past 6 months

24%	53%	23%
Yes	No, but I would be willing to try it	No and I would not be willing to try it

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 774

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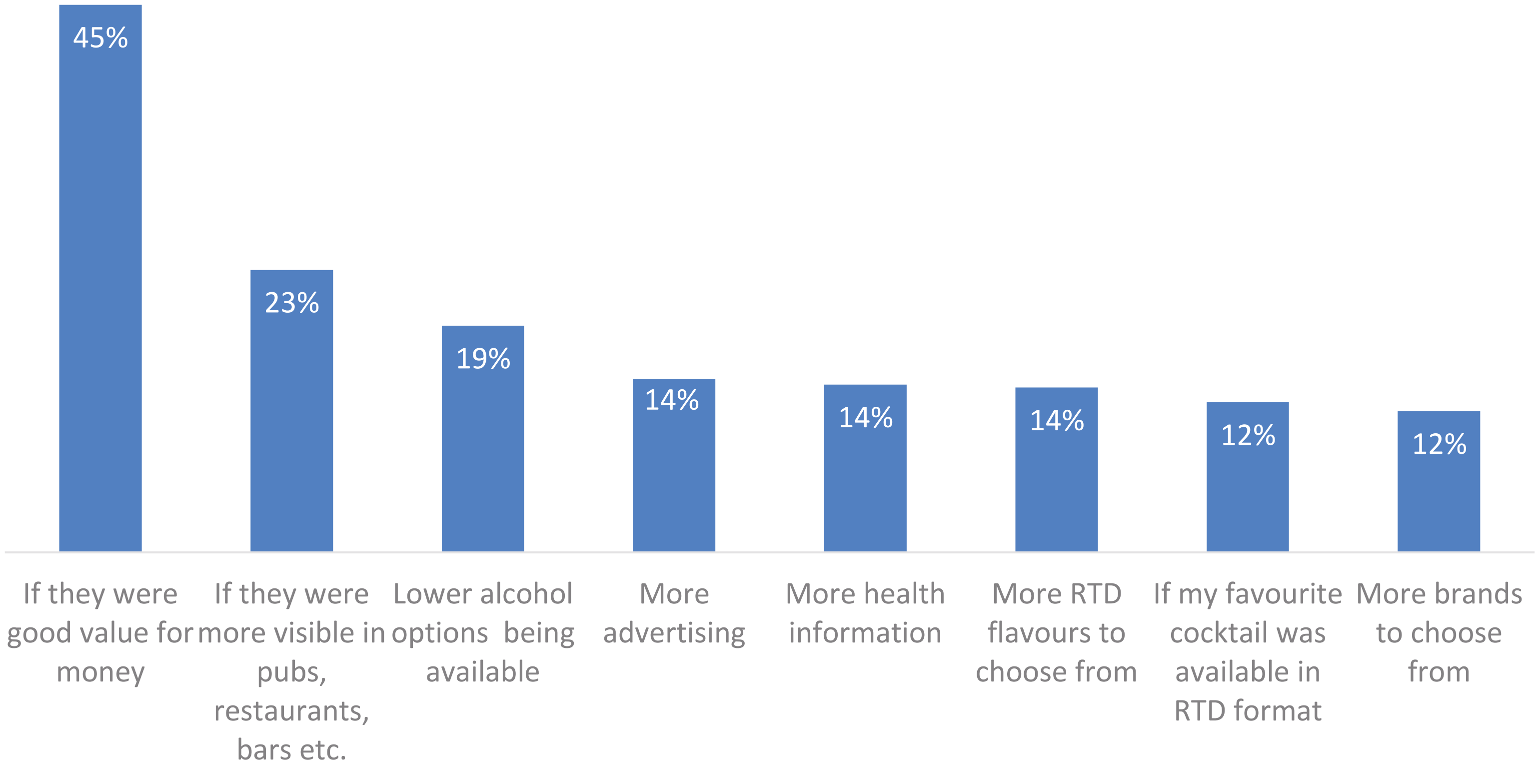
WOULD ANY OF THE FOLLOWING ENCOURAGE YOU TO PURCHASE RTDS FOR THE FIRST TIME IN PUBS, BARS AND RESTAURANTS?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 414

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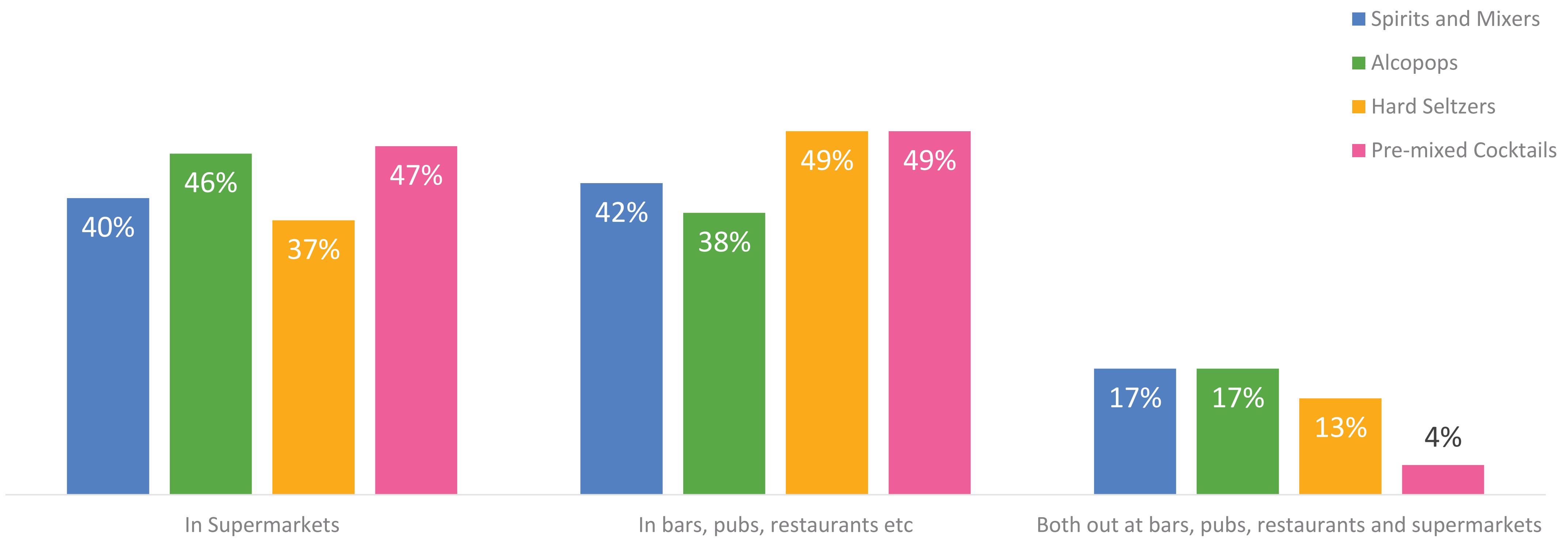
WHICH TYPE OF RTDS HAVE YOU PURCHASED IN THE PAST SIX MONTHS? PLEASE SELECT ALL THAT APPLY

Pre-mixed Cocktails	Hard Seltzers	Spirits and mixers	Alcopops
46%	38%	30%	14%

+13pp
for consumers who consider purchasing in the future

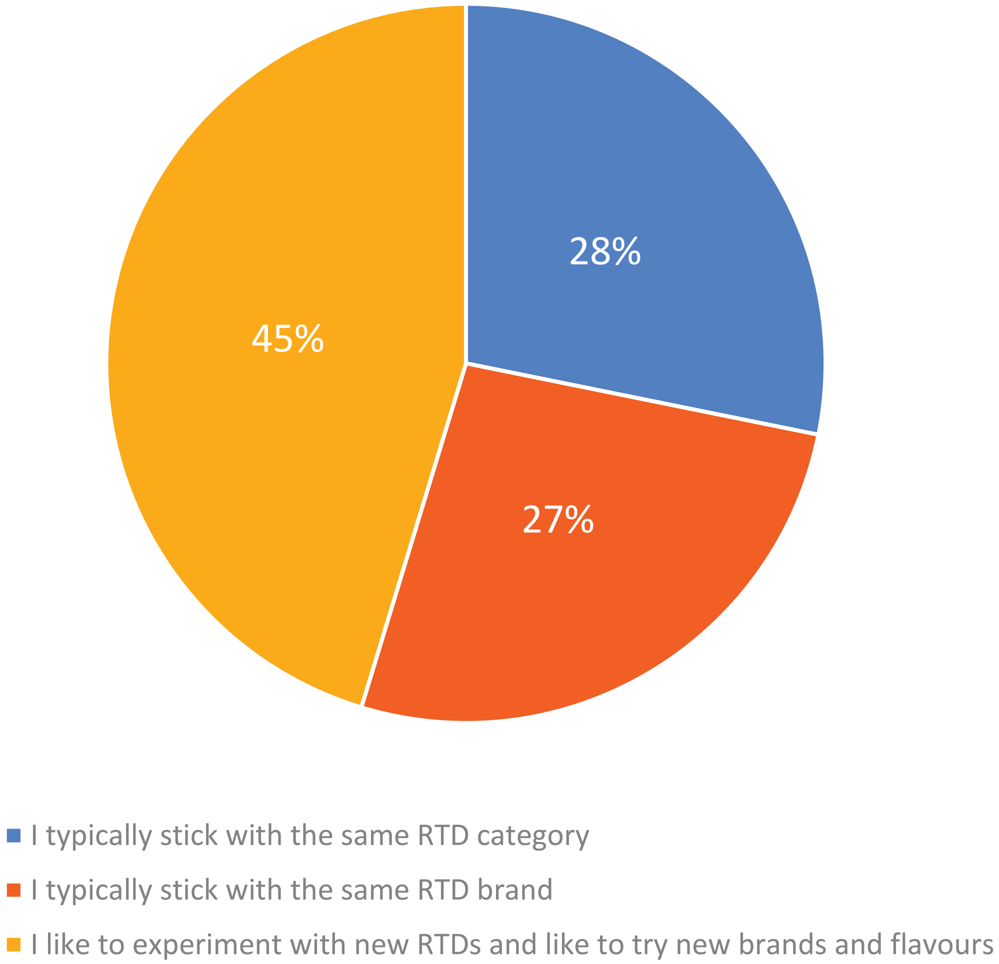
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 414

WHERE HAVE YOU PREVIOUSLY PURCHASED RTDS?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 24 - 83

WHICH OF THE FOLLOWING STATEMENTS BEST APPLIES TO YOU?

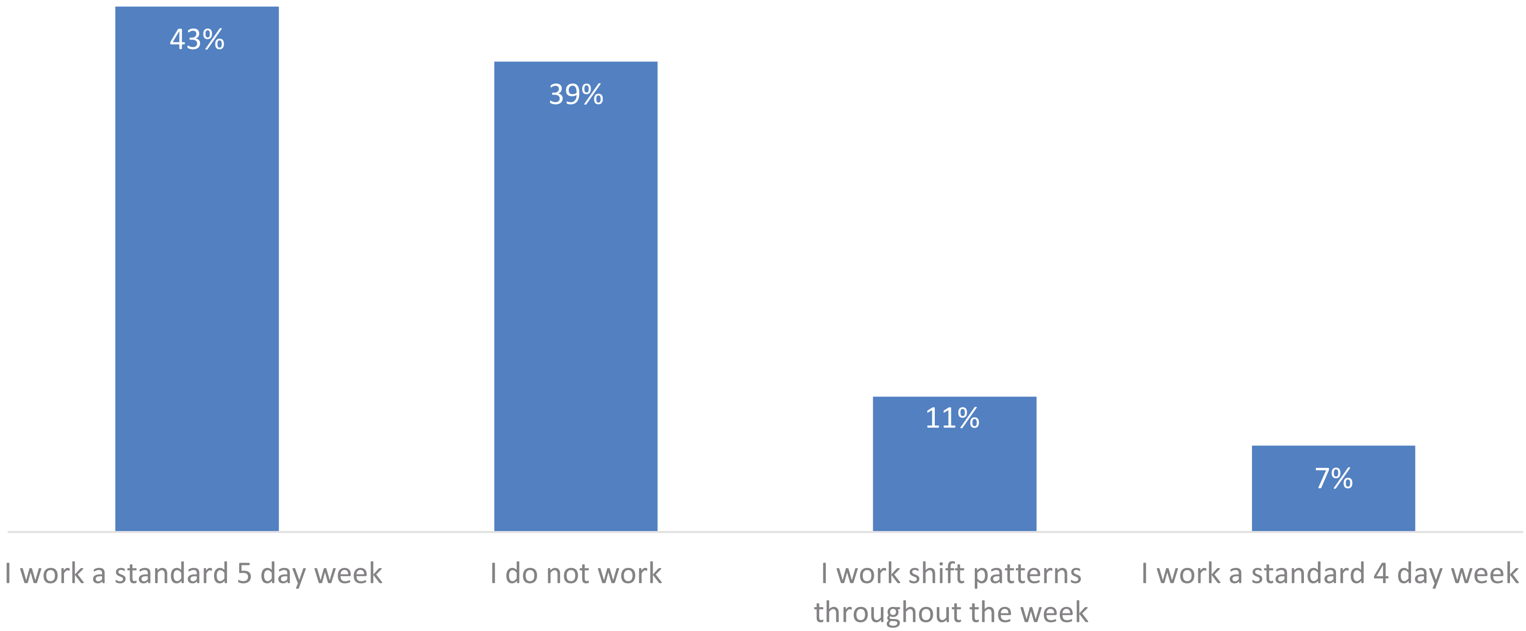


SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 181

Hot Topic:

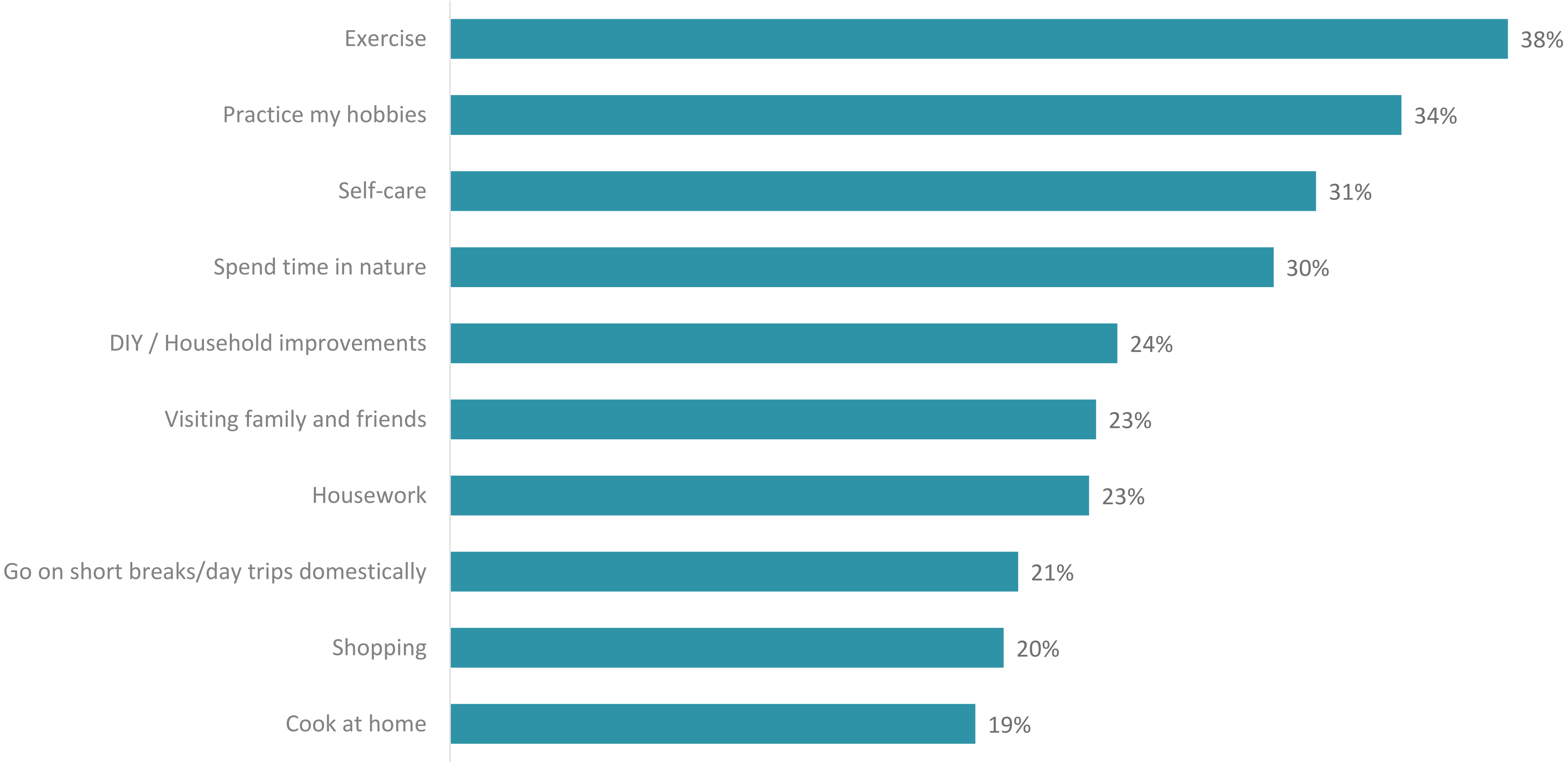
4 Day Working Week and Dynamic Pricing

Which of the following best applies to you in terms of your average work schedule?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 774

Which of the following do you, or would you, spend more time doing if you had an extra day off due to the 4-day working per week?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 389

Which of the following do you, or would you, spend more time doing if you had an extra day off due to the 4-day working per week?

18%

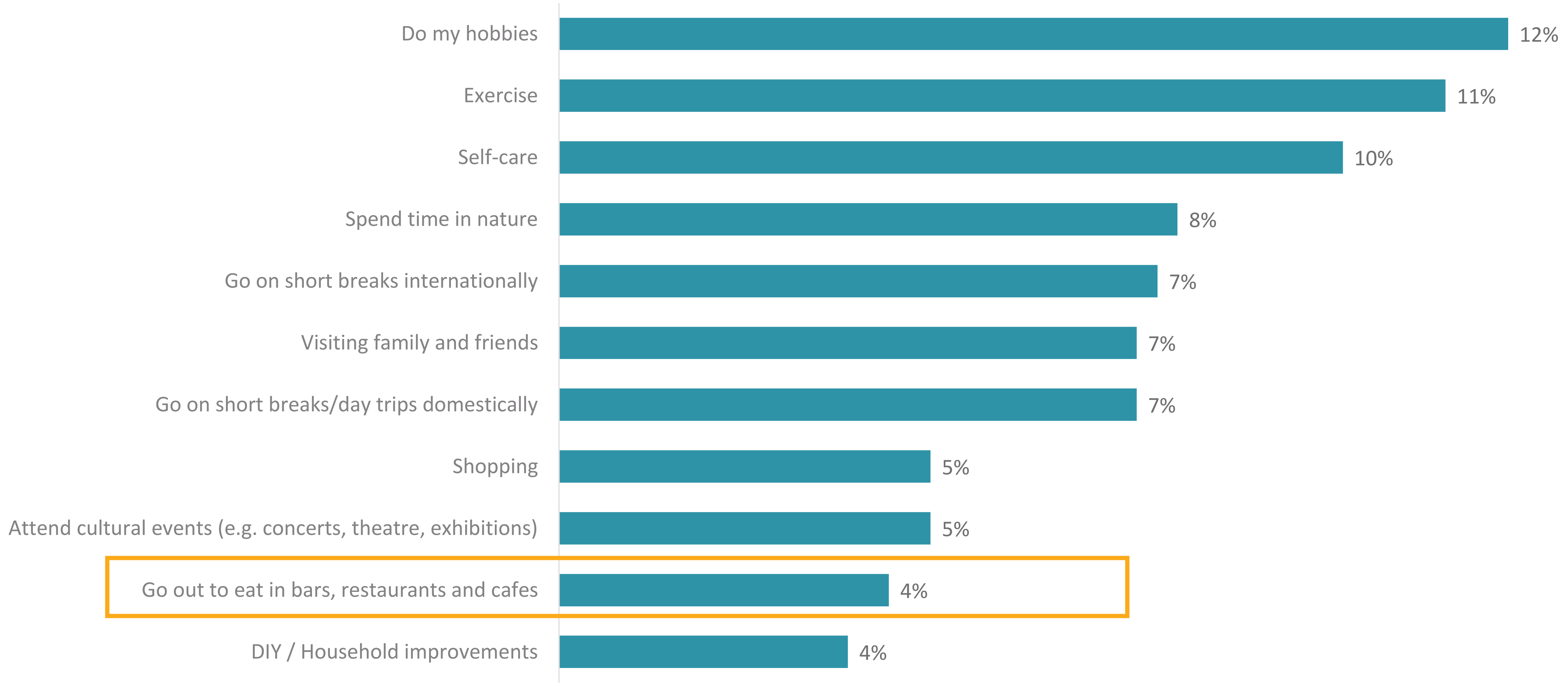
Of Consumers would go out to eat in bars, restaurants and cafes

17%

Of Consumers would go out to drink in bars, restaurants and cafes

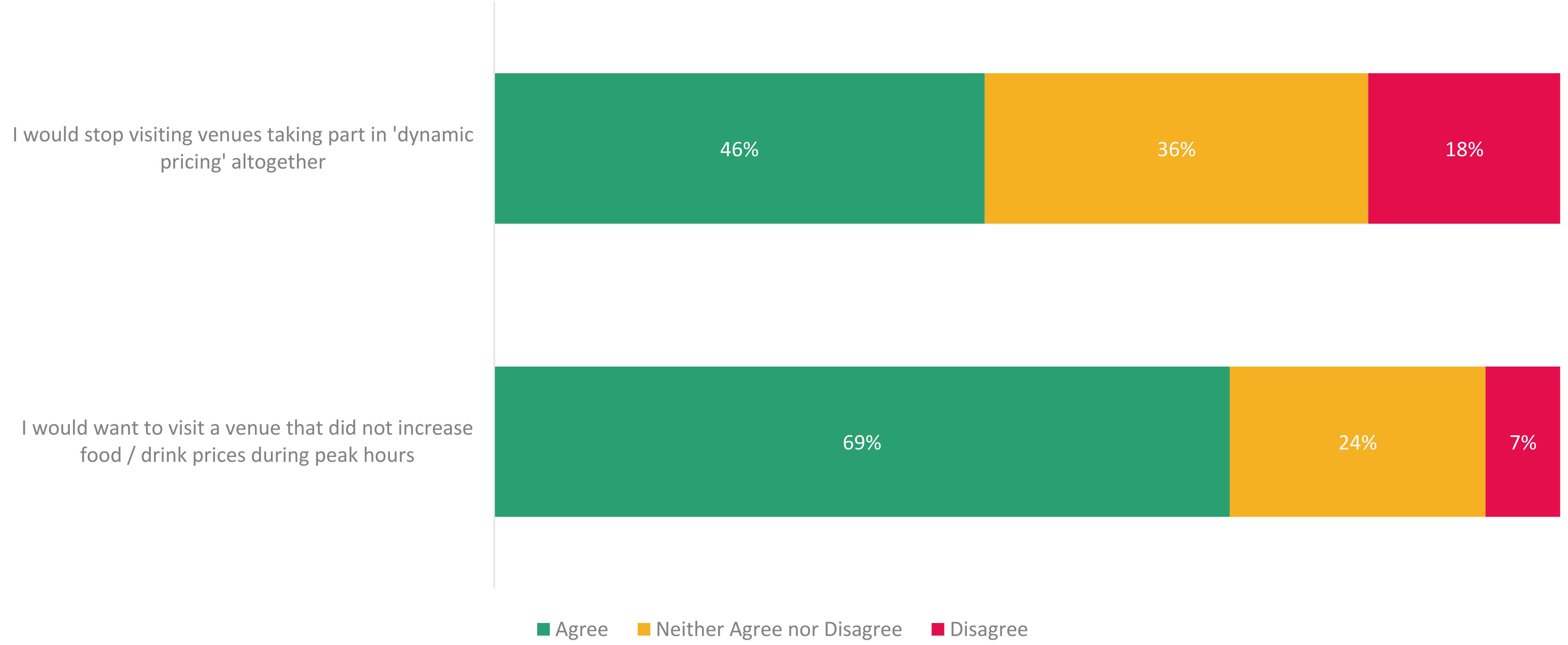
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 389

Where do you, or would you, prioritise your spending if you had an additional day per week off?



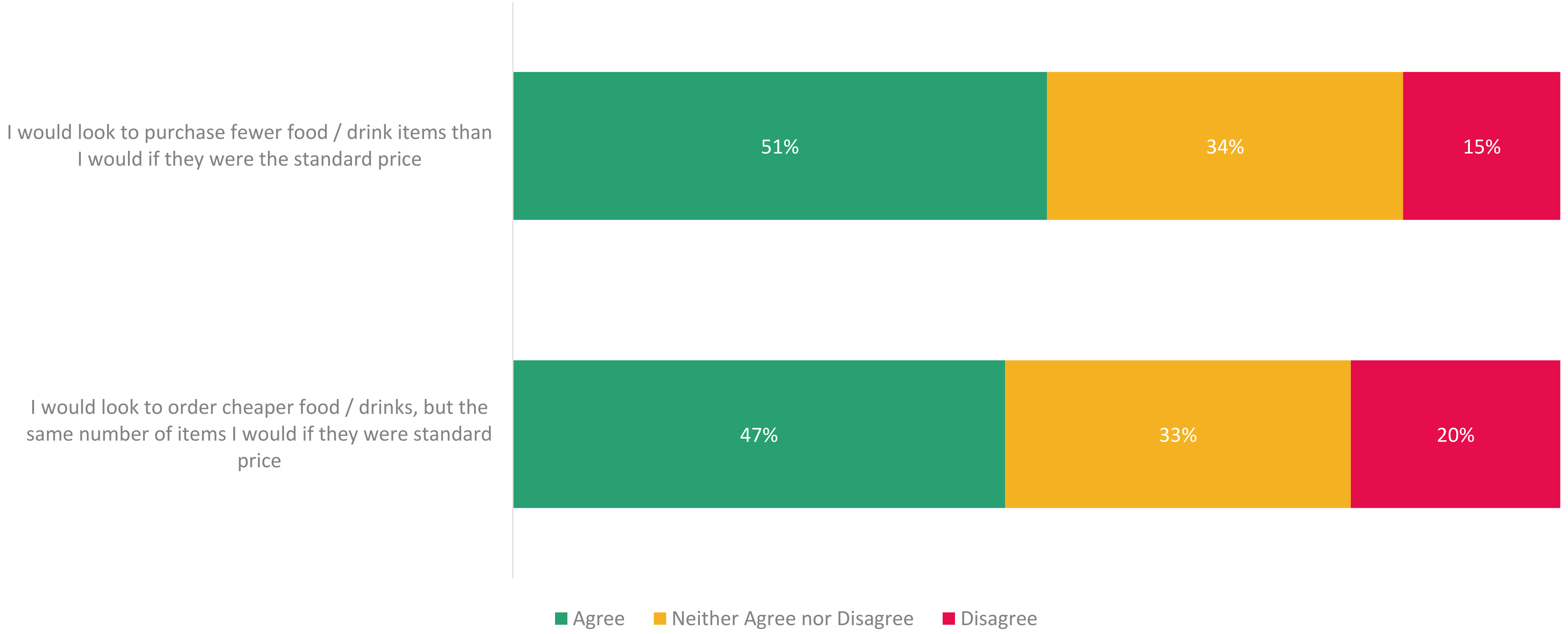
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 389

To what extent do you agree or disagree with the following statements regarding dynamic pricing?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 766-770

To what extent do you agree or disagree with the following statements if visiting a 'Dynamic Pricing' venue during peak hours?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 768-770

Want to know more about how global trends are currently impacting the French On Premise?

Global REACH Presentations

At CGA, April marks the release of our annual Global On Premise insights report – REACH.

Alongside the usual look at On Premise visitation, trending categories and venue choice factors, this year's report looks the topical issues affecting the industry such as sustainability, the cost of living crisis, social media and advocacy, education and others.

If you'd like to enquire about a presentation for you and your team, please get in touch via the contact information on the next slide.

Regional REACH reports

Following on from our annual Global REACH report will be our regional REACH reports aiming to explore more closely the nuances by market dependent on global location.

For the French On Premise this will be in the form of a dedicated European report.

Get in touch to discuss the available options.

OPUS Lite

If you'd like something a little closer to home, 2024 see's the launch of our OPUS Lite package, which provides market level insights on those trends impacting the On Premise globally.

Flexible options are available to suit your teams needs, whether that be through a ready made insight report or full access to the data set.

Get in touch to find out more.

Optimise your On Premise channel strategy with CGA's On Premise User Survey

Identify which channels to target with digital advertisements and solutions

Understand the biggest factors influencing drink choice across key On Premise channels

OPUS

Build sales stories for your brands to demonstrate the benefits of prioritising your brands to operators

CGA
Powered by NIQ

Global Bartender Reports

Market-specific insights based on a robust sample of 150 bartenders per country

- Understand the market nuances and the needs of hospitality professionals at a market level by purchasing country-specific Bartender Report
- Market-level reports are available for all countries included in the study and provide a rich insight into how to win with hospitality professionals, how to drive advocacy and the trends impacting specific countries

What you will receive

- *An in-depth report providing market level findings and recommendations allowing you to build relationships with this crucial audience, delivered in local language*
- *A virtual presentation of findings, delivered by CGA experts*

Investment

UK - $17,748	**USA - $22,185**	**France - $16,417**
South Korea - $17,526	**Italy - $16,417**	**Mexico - $19,523**
Germany - $19,967	**Australia - $17,525**	**Canada - $17,748**
Spain - $16,417		

Want to know more about the French On Premise?

OPUS Select

If you'd like to investigate a more specific topic more tailored to you and your business, 2023 see's the launch of the OPUS Select package. This provides market level insights focussing on specific topics from...

- Channel/ Occasion deep dive
- Category overview
- Hot topic
- Custom Business Case
- Demographic deep dive
- And more!

Get in touch to find out more.

OPUS Core

OPUS Core subscription allows you to delve into the details of consumer behaviour in the On Premise, from granular detail about each channel, occasion and drink category, as well as identifying how key trends are impacting the industry.

Get in touch to find out more.

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Contact Us

To learn more or to speak to a member of the team, please feel free to get in touch:

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