



# ITALY ON PREMISE CONSUMER PULSE REPORT

CGA by NielsenIQ, March 2025

NielsenIQ



# SUMMARY

- **Visitation Rate in March:** On Premise visitation remained stable from February to March, with over 4 in 5 going out to eat and over 1 in 2 visiting to drink. Weekends are still the busiest time, despite a slight drop in Sunday visits compared to last year. Late morning and lunchtime have seen an increase in footfall compared to 2024; nonetheless, early and late evening remain key occasions to focus on.
- **Categories Drunk:** Beer, aperitifs, and wine are the top three categories by penetration, though they all suffer decrease in consumption compared to last year – particularly the first two; no/low alternatives are still small as a category but also the only one experiencing growth year-over-year.
- **Prognosis for April:** Over 1 in 5 intends to visit the On Premise more often next month, outweighing the 1 in 10 planning to reduce visits – resulting in a positive net outlook.
- **Hot topic – On Premise Sentiment:** Consumers view the On Premise as an important space with a unique atmosphere that can't be recreated at home. While the social aspect is important, the quality of food and drinks is paramount, with many perceiving it as a luxury or treat. While loyal to trusted venues, they enjoy exploring new ones. This desire for novelty translates to a desire for more unique options – alongside discounts and promotions, and a growing interest in healthier choices
- **Hot topic – Occasions:** Consistent with these perceptions, consumers plan to prioritise visits for "special occasion", followed by informal meals and aperitivo drinks – the most popular occasion in Italy. While the latter two are typically spontaneous, consumers tend to plan special occasions days in advance, presenting opportunities for venues and producers to engage them through targeted marketing and promotions.



**Valeria Bosisio**

Client Success & Insights  
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“ The Italian On Premise sector continues to thrive as a lively hub where the love for socializing outweighs economic pressures. It's essential for operators to tap into the right strategies to attract consumers looking for genuine experiences and meaningful moments of togetherness. ”

“

Unlock the potential of the Italian On Premise market with strategic insights and targeted actions. By leveraging the premiumization trend and aligning with consumer values, growth can be driven and brand loyalty enhanced. Collaborate to create impactful promotional campaigns and innovative experiences that resonate with Italian consumers. ”



**Stephen Wann**

Client Director - EMEA  
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# 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 February and March 2025 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 **March 2025** issue, we surveyed 751 consumers (aged 18+) between March 17<sup>th</sup> – 21<sup>st</sup> 2025. 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



# 82%

of consumers have been out to eat in the previous month

=0pp vs March last year

# 55%

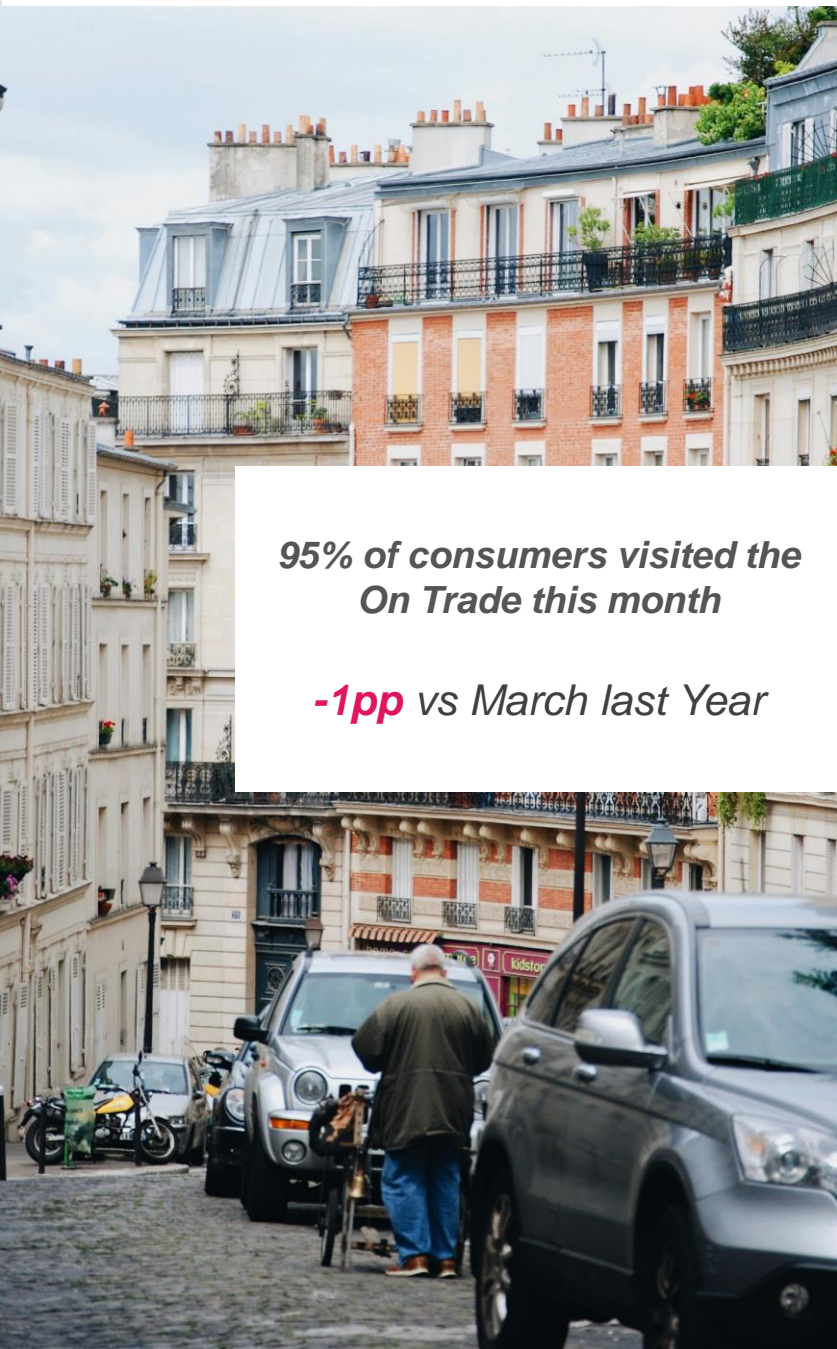
of consumers have been out for a drink in the previous month

+1pp vs March last year



Source: CGA Monthly On Premise Consumer Pulse Report March 2025 – Sample: 750 – 759

# LOOKING BACK

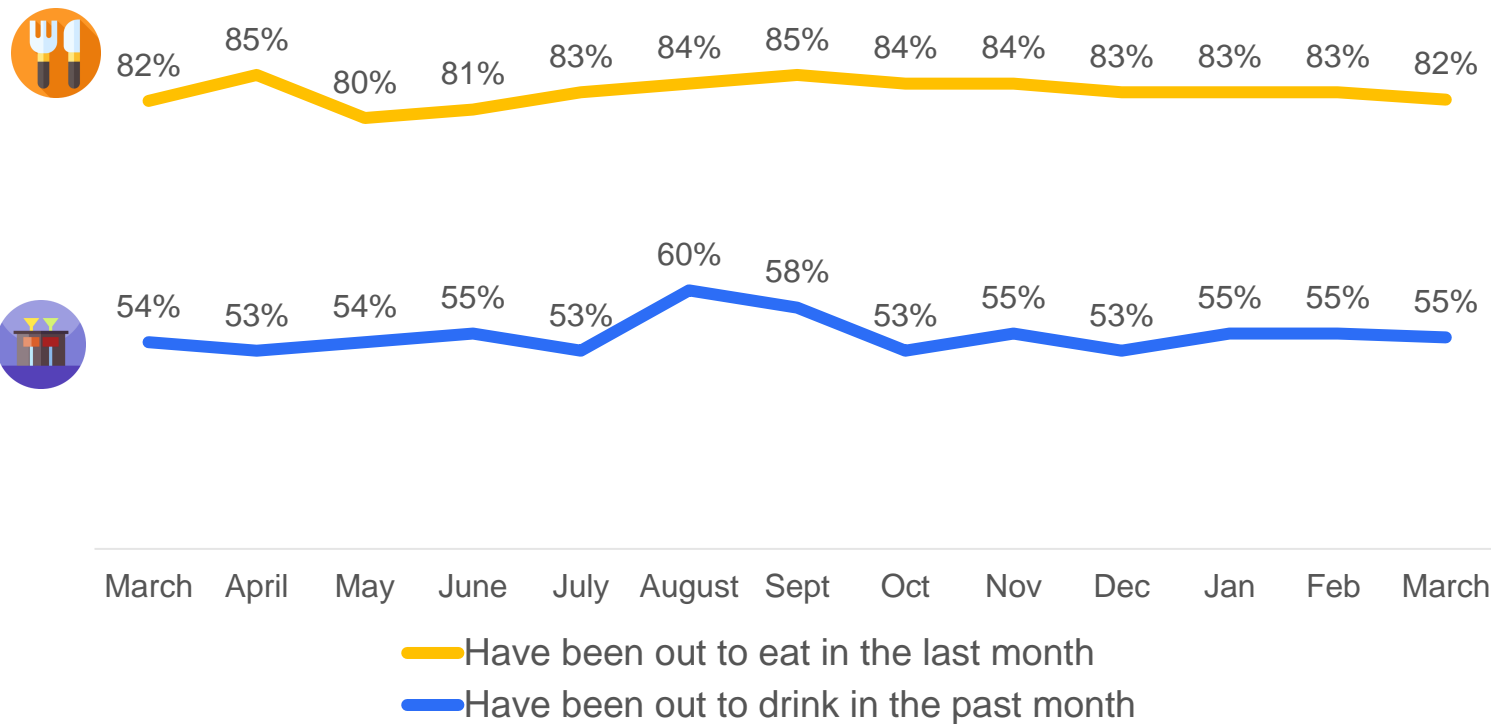


95% of consumers visited the On Trade this month

-1pp vs March last Year

## FREQUENCY VISITING THE ON PREMISE OVER THESE LAST MONTHS

Yearly visitation rates to the On-Premise



Source: CGA Monthly On Premise Consumer Pulse Report March 2025 – Sample: 750 – 759



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

Frequency visiting On Premise in the past month

■ Everyday / almost everyday   ■ Weekly   ■ Monthly



Overall



+1pp vs March last year

-7pp vs March last year

+6pp vs March last year



To Drink



To Eat



Source: CGA Monthly On Premise Consumer Pulse Report March 2025 – Sample: 409 – 729

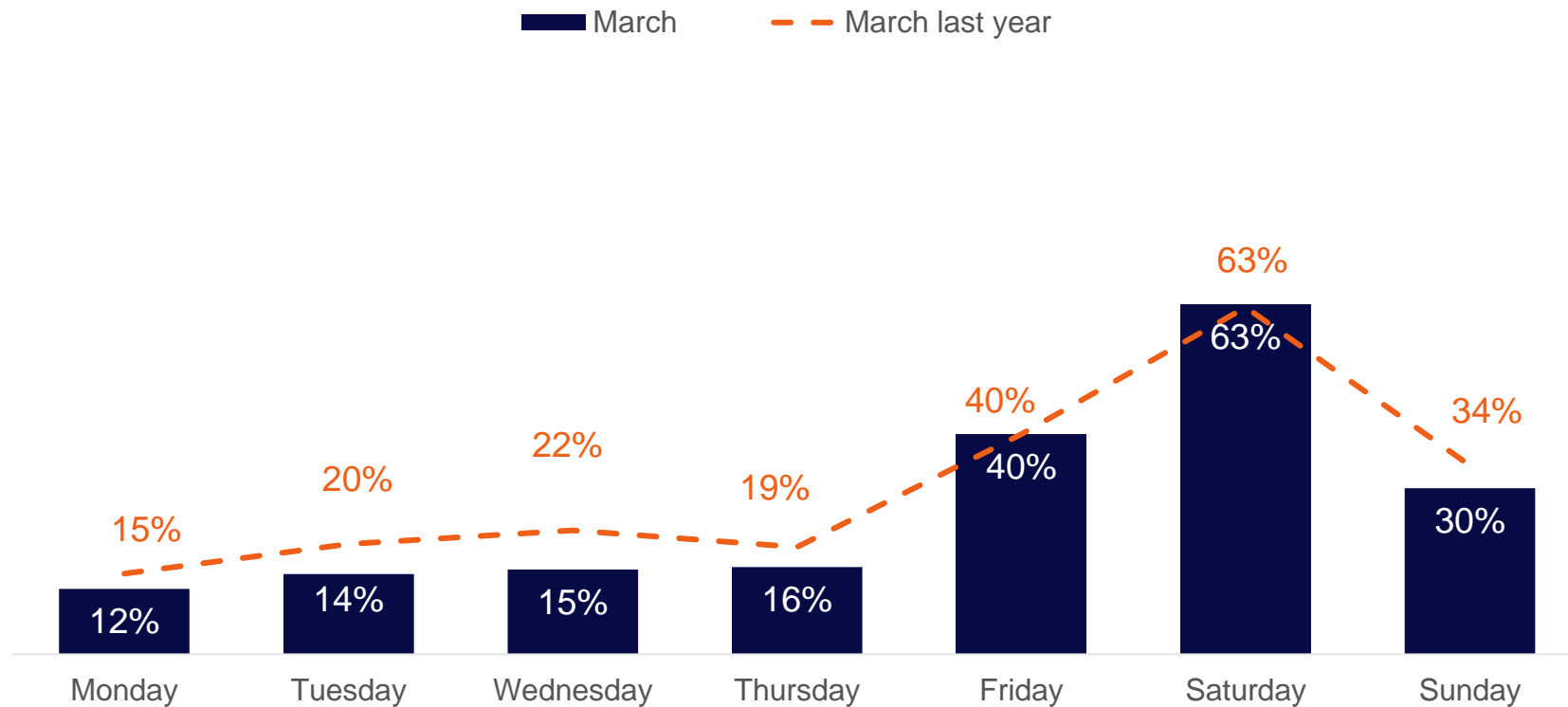






# ON WHICH DAY(S) OF THE WEEK HAVE YOU VISITED A BAR, RESTAURANT OR OTHER SIMILAR VENUE OVER THE PAST MONTH?

Day of the week visiting the On Premise

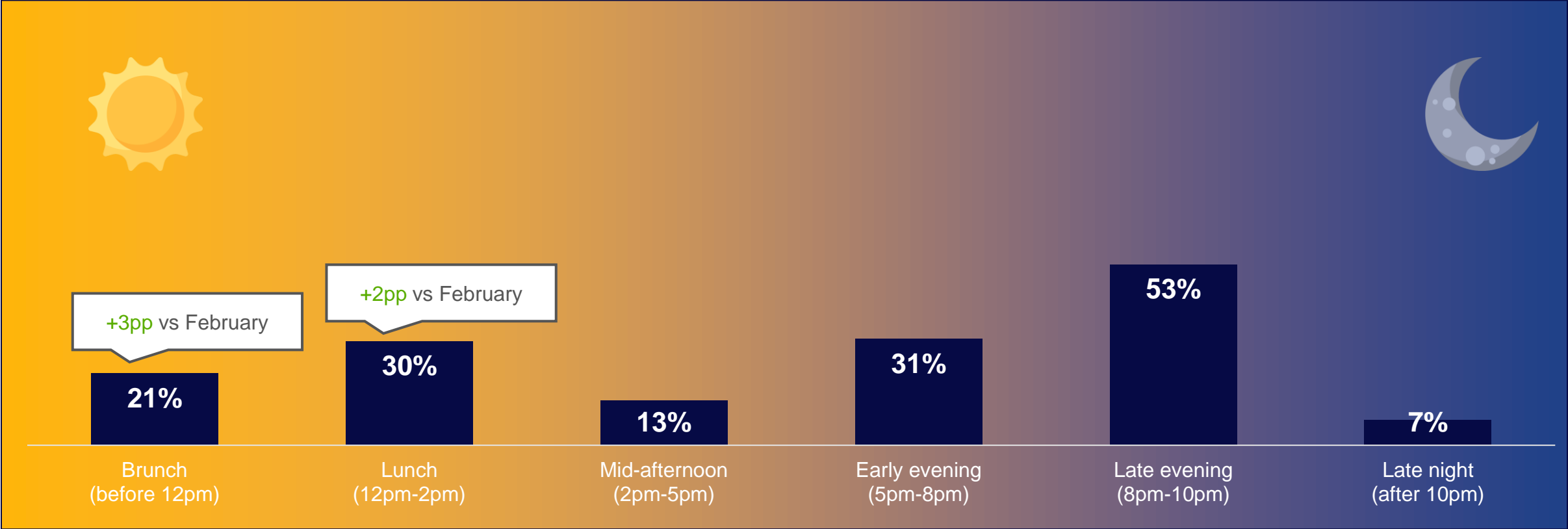


Source: CGA Monthly On Premise Consumer Pulse Report March 2025 – Sample: 712 – 729



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

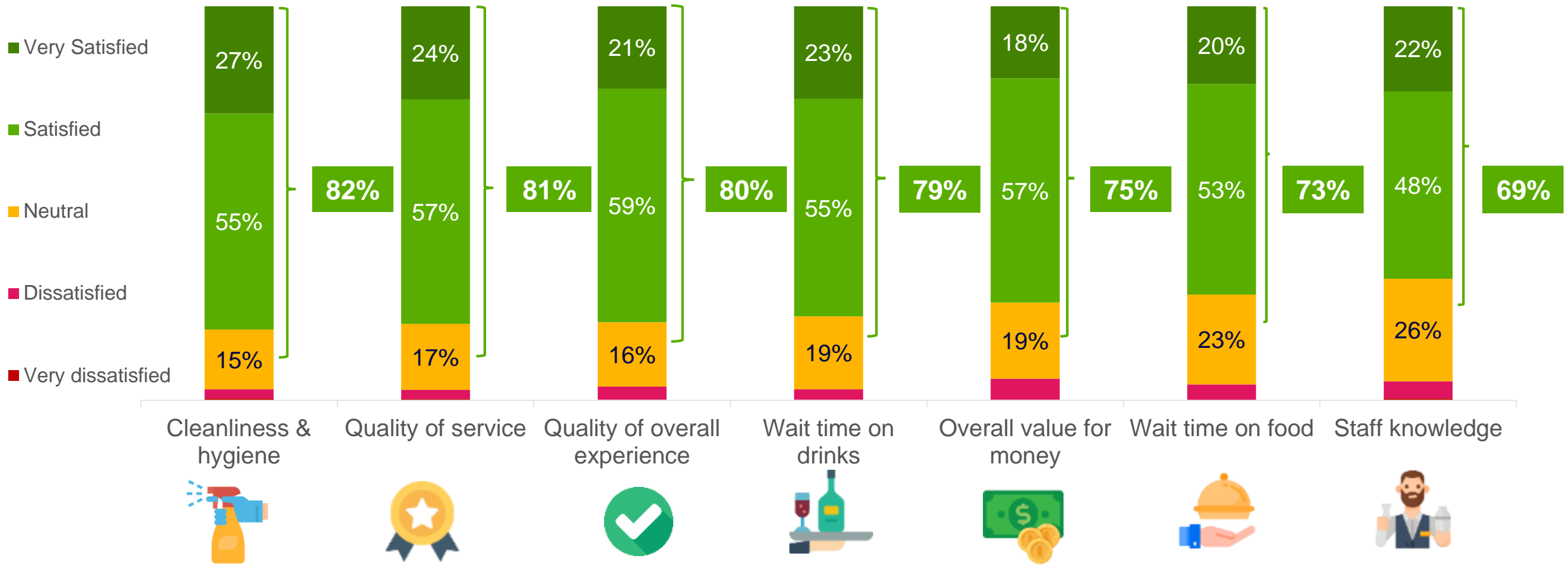
Time of day for visiting the On Premise



Source: CGA Monthly On Premise Consumer Pulse Report March 2025 – Sample: 710

# SATISFACTION WITH MOST RECENT VISIT TO THE ON PREMISE

Proportion of consumers very satisfied/satisfied with...



Source: CGA Monthly On Premise Consumer Pulse Report March 2025 – Sample: 614 - 747



# Key Metrics: Categories Drunk



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

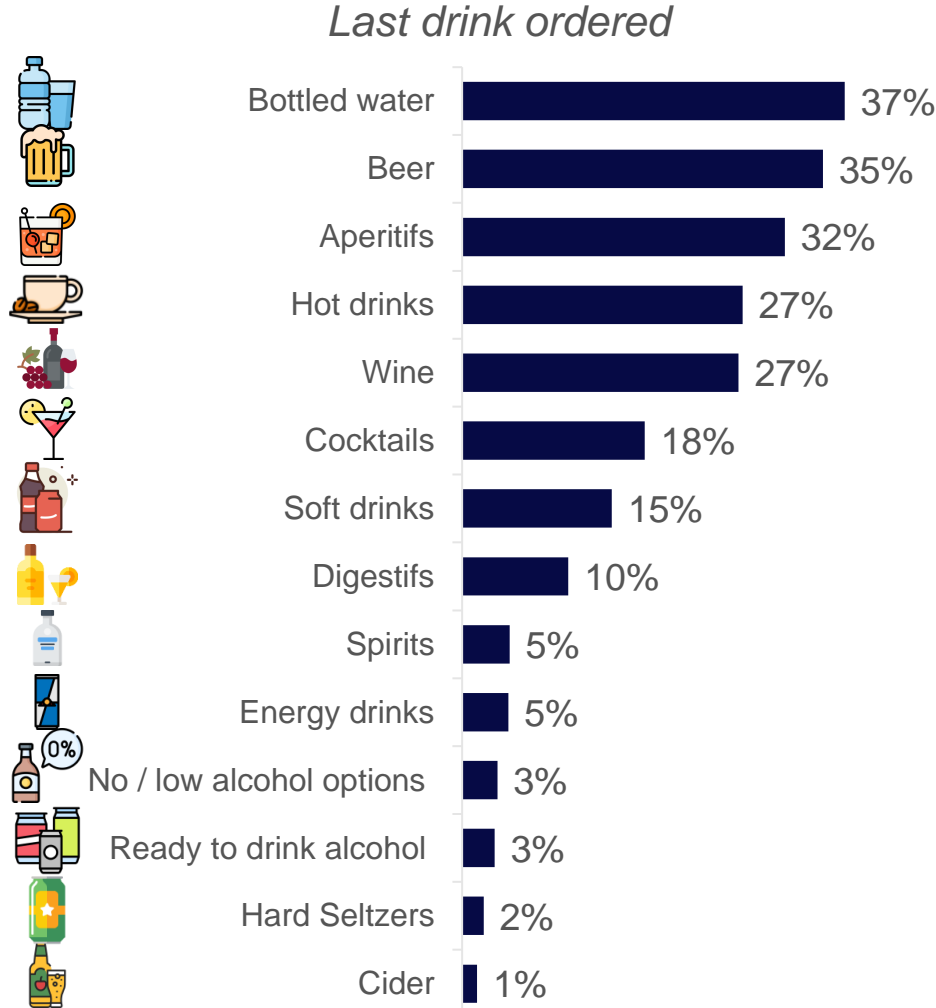
Most popular drink categories | Indexed vs. March last year



Source: CGA Monthly On Premise Consumer Pulse Report March 2025 – Sample: 712 - 729



# 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 March 2025 – 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** 



Hot drinks

Beer

Digestifs

Aperitifs

Wine

Cocktails

Soft drinks

Bottled water

82%

80%

79%

78%

76%

76%

72%

70%

Source: CGA Monthly On Premise Consumer Pulse Report March 2025 – Sample: 77 - 274



# 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** 🌟



Digestifs

Wine

Beer

Cocktails

Aperitifs

Soft drinks

Hot drinks

Bottled water

88%

81%

80%

80%

78%

74%

74%

69%

Source: CGA Monthly On Premise Consumer Pulse Report March 2025 – Sample: 77 - 258

# 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**



Wine	Hot drinks	Aperitifs	Cocktails	Digestifs	Beer	Bottled water	Soft drinks
85%	84%	84%	84%	83%	83%	78%	77%

Source: CGA Monthly On Premise Consumer Pulse Report March 2025 – Sample: 78 - 264





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

+27pp for Gen-Z consumers

+9pp for consumers from Rome, +8pp for consumers from Milan



23%

Sì



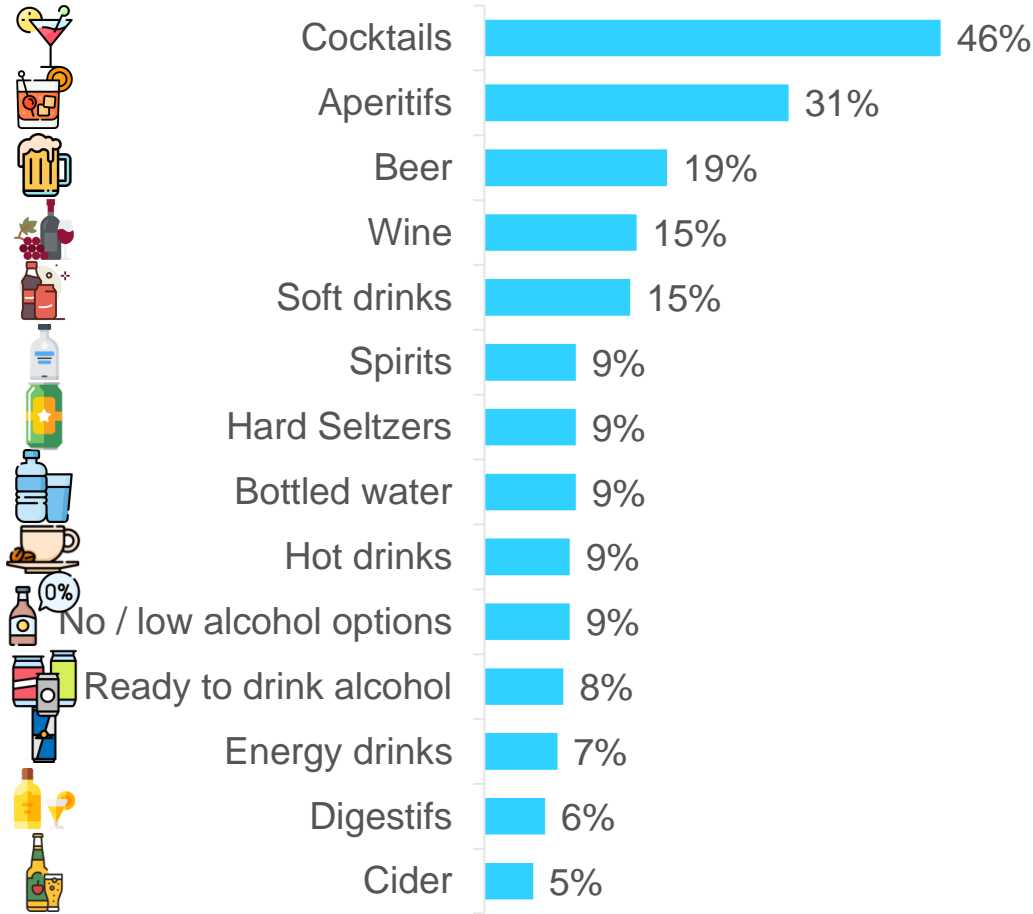
77%

No

Source: CGA Monthly On Premise Consumer Pulse Report March 2025 – Sample: 123 - 712

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

*New drinks tried by those going out for food and drinks*



Source: CGA Monthly On Premise Consumer Pulse Report March 2025 – Sample: 162

# Key Metrics: Next Month Prognosis







76%

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

38%

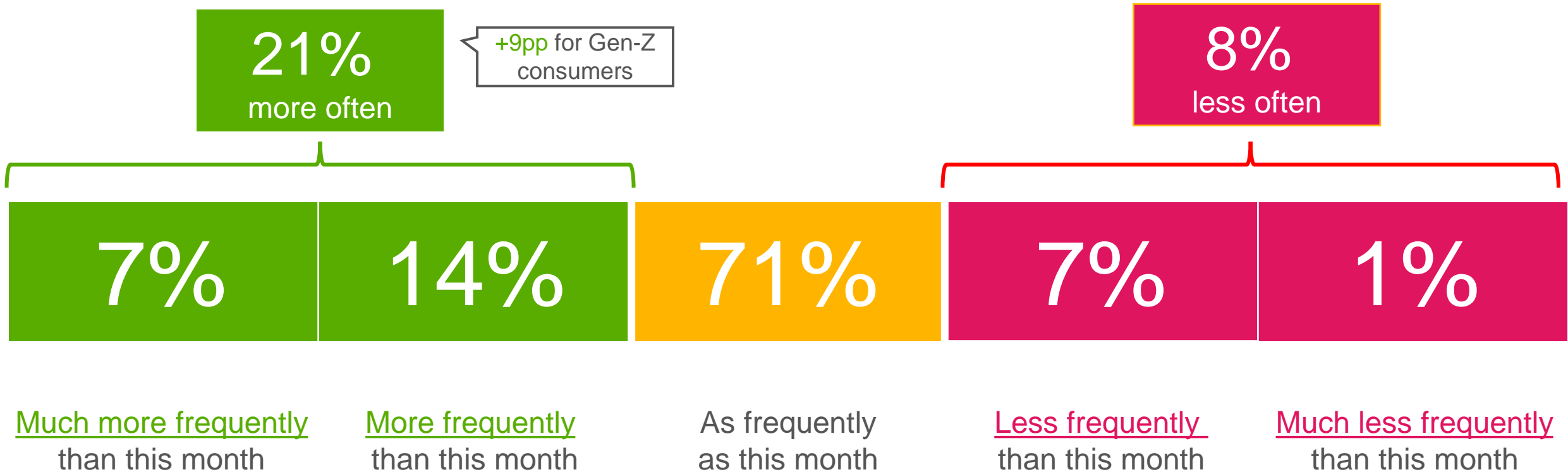
of consumers plan to go out for a drink in the next month



Source: CGA Monthly On Premise Consumer Pulse Report March 2025 – Sample: 746

# 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 March 2025 – Sample: 120 - 701

# Hot Topic: On Premise sentiment



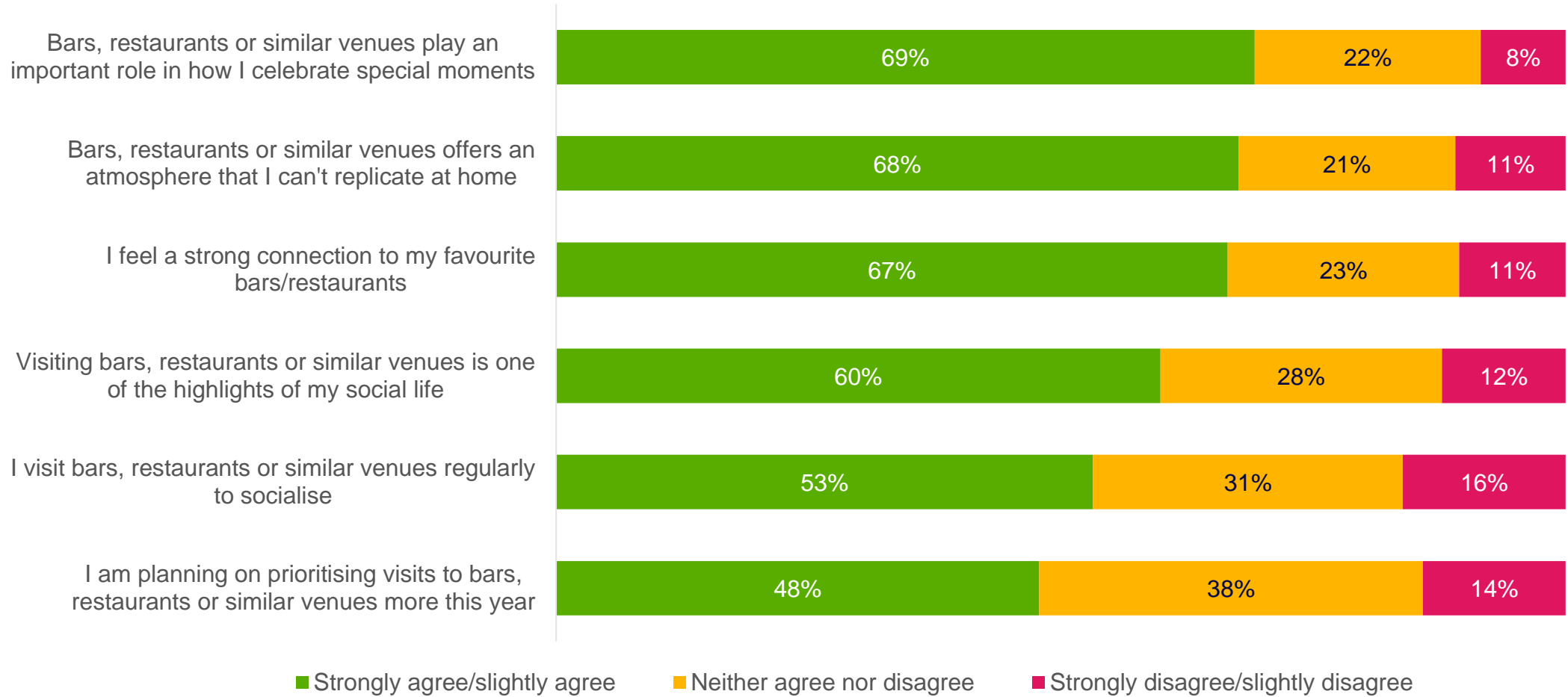
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# HOW MUCH DO YOU AGREE OR DISAGREE WITH THE BELOW STATEMENTS:

Agreement levels with On Premise sentiment statements

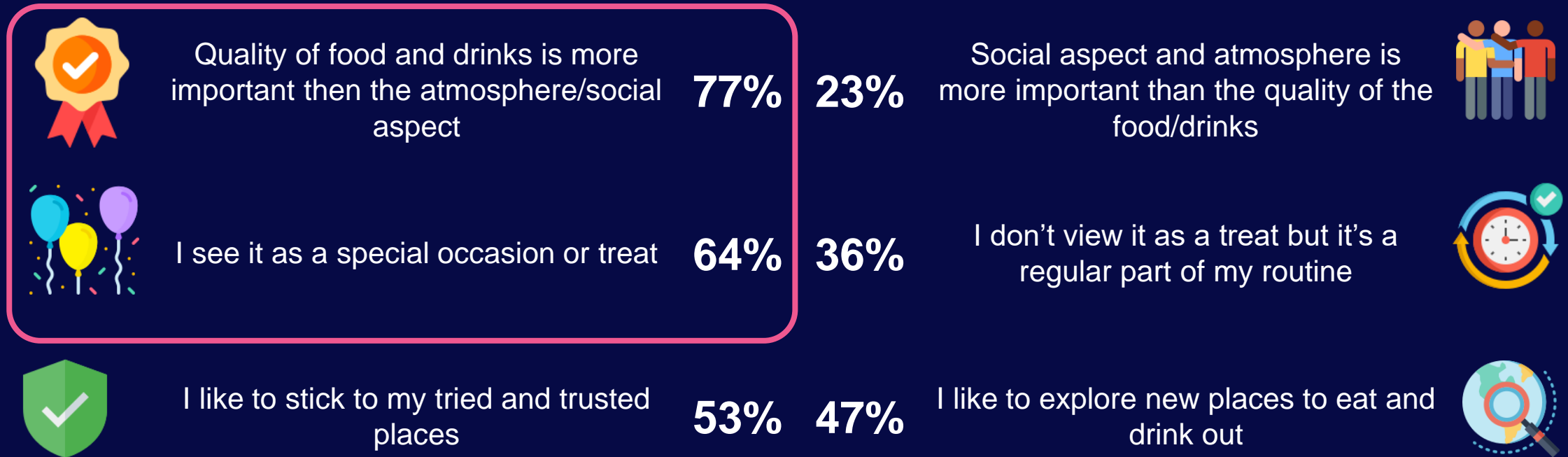


Source: CGA Monthly On Premise Consumer Pulse Report March 2025 – Sample: 750

# WHICH OF THE FOLLOWING BEST DESCRIBES YOUR MINDSET WHEN VISITING A BAR, CAFÉ, RESTAURANT OR OTHER SIMILAR VENUE?

PLEASE SELECT ONE FOR EACH ROW:

*How consumers view visiting the On Premise*



Source: CGA Monthly On Premise Consumer Pulse Report March 2025 – Sample: 669 - 706

# WHAT DO YOU WANT TO SEE MORE OF WHEN VISITING BARS, RESTAURANTS AND OTHER SIMILAR VENUES THIS YEAR?

## *Elements consumers want to see more of in the On Premise*



Source: CGA Monthly On Premise Consumer Pulse Report March 2025 – Sample: 750



# Hot Topic: Occasions

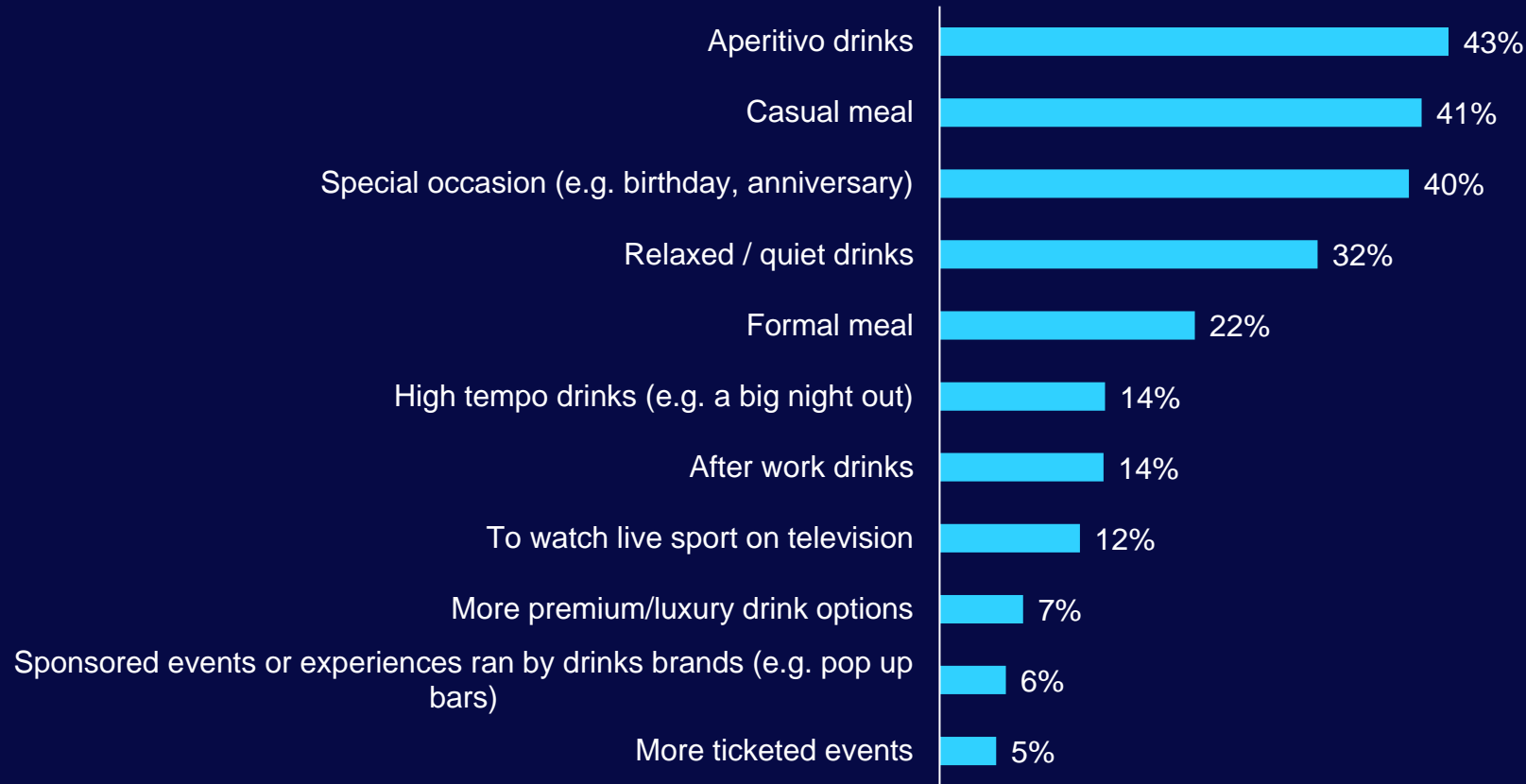


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# WHICH OF THE FOLLOWING OCCASIONS HAVE YOU BEEN OUT FOR IN THE PAST 3 MONTHS?

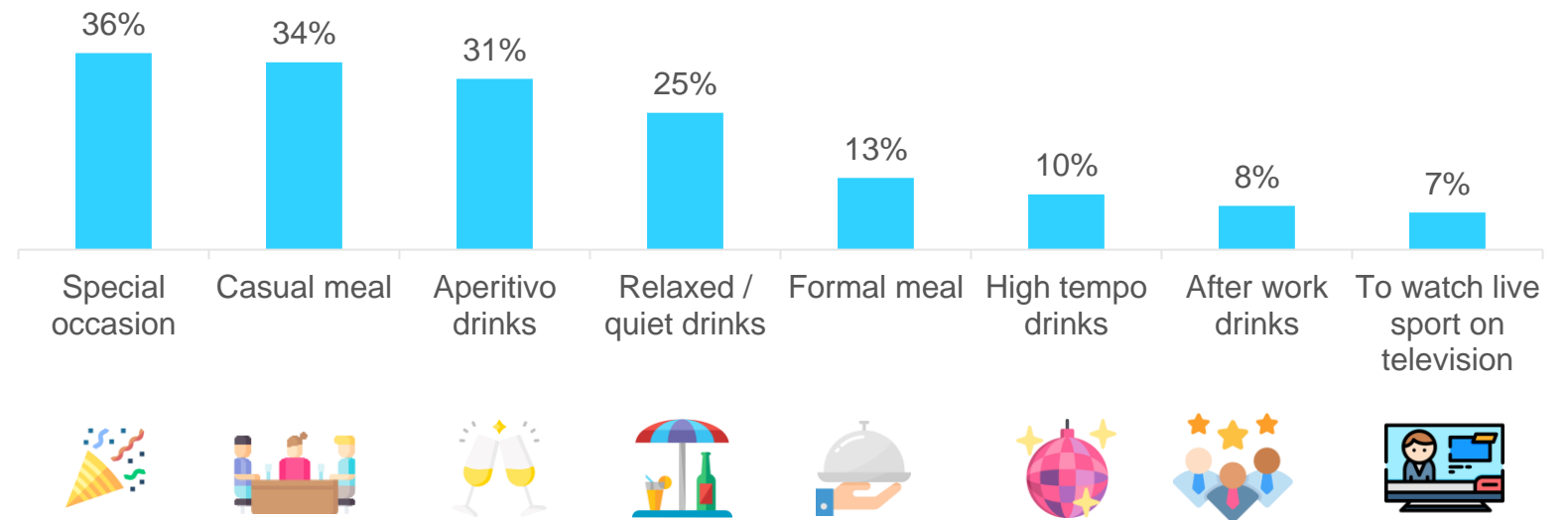
*Occasions consumers have visited the On Premise for*



Source: CGA Monthly On Premise Consumer Pulse Report March 2025 – Sample: 750

# WHICH OF THE BELOW OCCASIONS ARE YOU MOST LIKELY TO PRIORITISE GOING OUT FOR OVER THE REST OF THE YEAR? PLEASE SELECT YOUR TOP 2:

*Occasions consumers are prioritizing for the rest of the year*

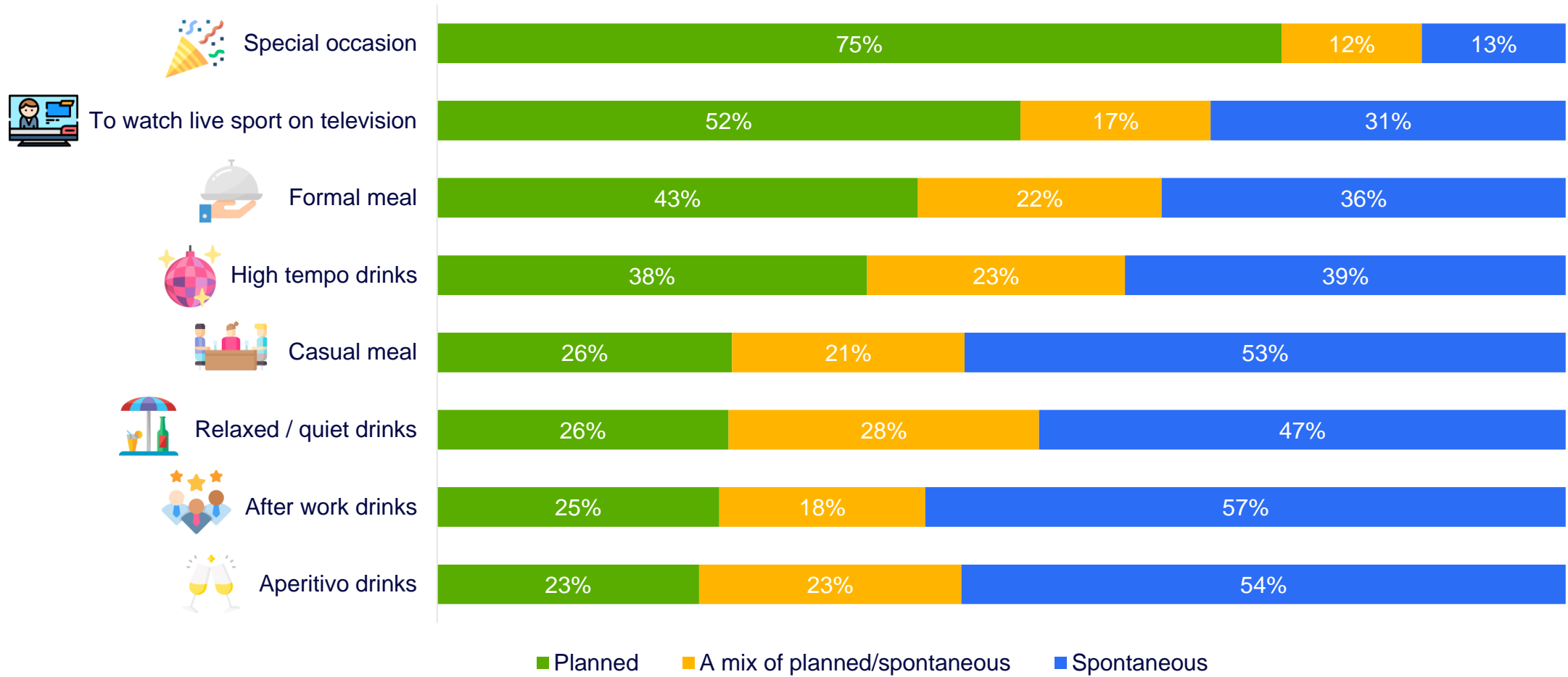


Source: CGA Monthly On Premise Consumer Pulse Report March 2025 – Sample: 720



# 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*

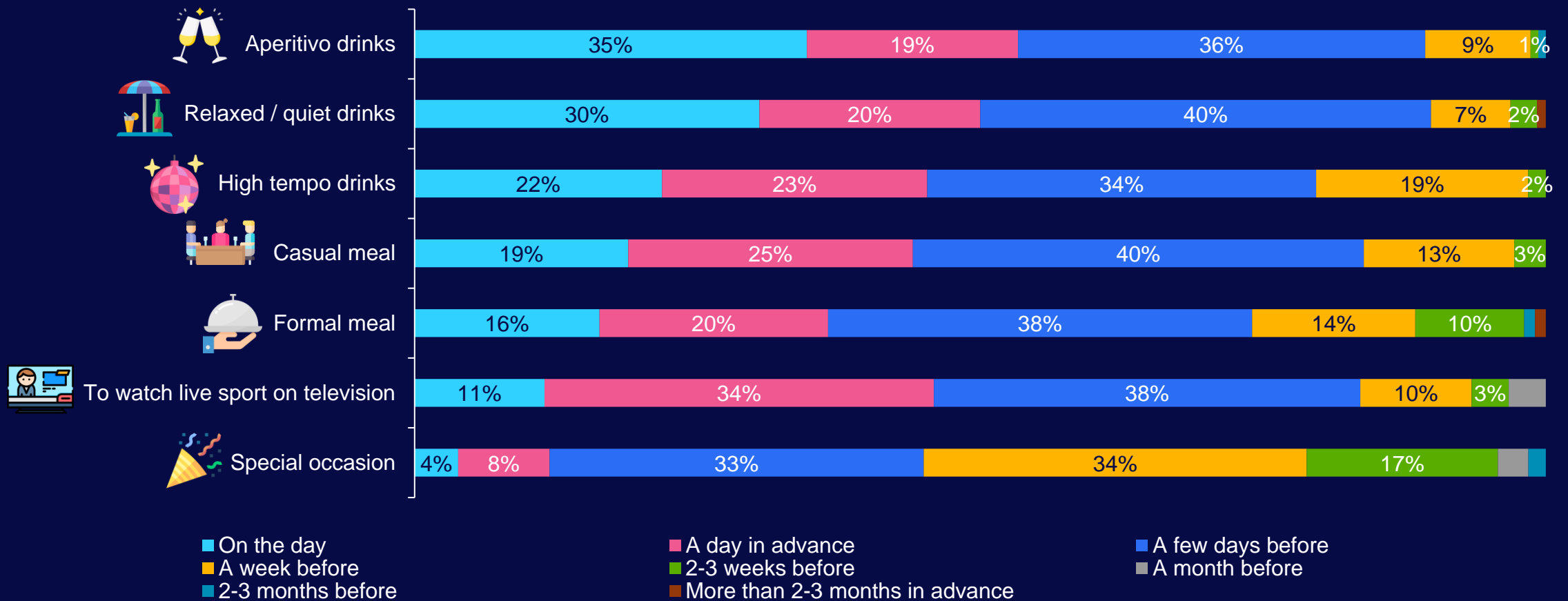


Source: CGA Monthly On Premise Consumer Pulse Report March 2025 – Sample: 89 - 323

# YOU HAVE SAID YOU PRE-PLAN GOING OUT FOR THE BELOW OCCASIONS, HOW FAR IN ADVANCE DO YOU TYPICALLY PLAN GOING OUT FOR THESE OCCASIONS?

Asked to those who pre-plan for specific occasion

How far in advance consumers pre-plan occasions



Source: CGA Monthly On Premise Consumer Pulse Report March 2025 – Sample: 61 - 260

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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 to build a successful On Premise strategy*

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



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