AUSTRALIAN ON PREMISE PATH TO PURCHASE

PREVIEW OF THE FULL DECK

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A LOOK AT THE CHANGED PATH TO PURCHASE

Evidence from On Premise markets around the world have shown that the **Path to Purchase** is fundamentally different now for many consumers.

The way people are planning their visits to bars and restaurants has changed, how they order when in-situ is different for many reasons, their expectation of the experience generally has shifted and how these combined components now translates to intentions for a repeat visit is different.

We wanted to look at these dynamics more closely in Australia, and so over our four consumer pulse reports we focussed on key areas of the consumer path to purchase.

This document features some of the highlights from our full deck – get in touch to learn more.

April	May	June	July
Planning the visit	Ordering in outlet	Assessing the in-venue experience	Repeat purchase

PLANNING THE VISIT

Pre-planned visits are incredibly important to the channel, so well marketed events and social media/web presence is essential. Spontaneous visits are also super important, accounting for 4/10 of all visits in the last month

Proportion of consumers' visits in the last month which have been planned vs spontaneous

59% have been **planned**

41% Have been **spontaneous**

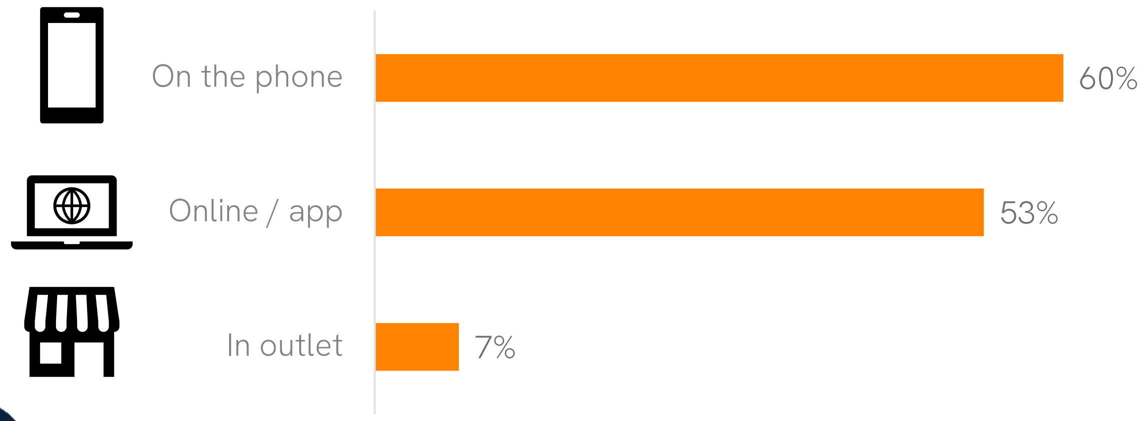
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT – SAMPLE: 750

Supplier interaction during the booking process is a significant opportunity for 'first-drink choice' (especially for the 53% booking online/app)

Consumer use of pre-booking in the past month

15%	25%	25%	35%
Yes, all the venues I've visited have been pre-booked	Yes, most of the venues I've visited have been pre-booked	Yes, some of the venues I've visited have been pre-booked	No, none of the venues I've visited have been pre-booked

Prebooking methods used:



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT – SAMPLE: 750, consumers that pre-booked 489

DIGITAL ORDERING: PRE-VISIT INTERACTION

74%

Interact with at least one online platform ahead of their visit to a venue

+17pp for 18-34 year olds

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT – SAMPLE: 748; 18-34: 265

Regardless of the availability of online menus, they haven't overtaken a traditional ordering mechanism as of yet – consumers still want and expect to interact with staff

If a bar, restaurant or other similar venue has a menu available online, would you expect...

52%

To be able to order face-to-face with an employee in the venue

38%

To be able to order both digitally and/or face-to-face with an employee in the venue

10%

To be able to order digitally in the venue

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT – SAMPLE: 742

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DIGITAL ORDERING: IN VENUE INTERACTION

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64%

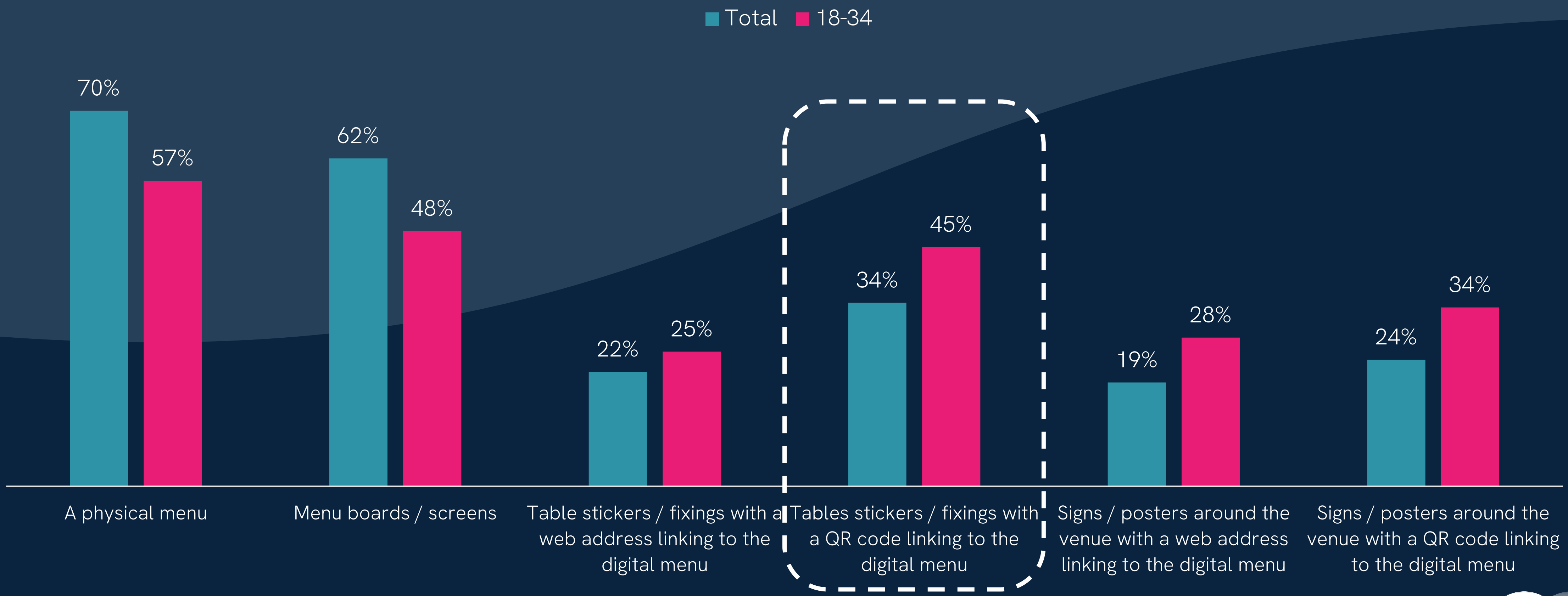
Interact with digital menus / ordering platforms in the On Premise

+20pp for 18-34 year olds

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT - SAMPLE: 747; 18-34: 265

Overall, the availability of digital ordering isn't yet a dominant expectation from consumers, but for younger age groups qr codes are already anticipated nearly as much as traditional menu types

When arriving at a bar, restaurant or other similar venue, do you expect to see any of the following? Please select all that apply



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT – SAMPLE: 749; 18-34: 265

DECIDE WHAT TO DRINK: IN VENUE EXPERIENCE

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1 in 5

Make a decision on what to drink before even entering a venue

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT - SAMPLE: 750

However, this is typically at a category level rather than specific brand level meaning there's plenty of opportunity to influence brand choice upon arrival with a heavy brand presence in venue

Which of the following best describes the decision you have typically made before visiting a venue?

73% I know the specific category I will drink

I know the specific brand I will drink **27%**

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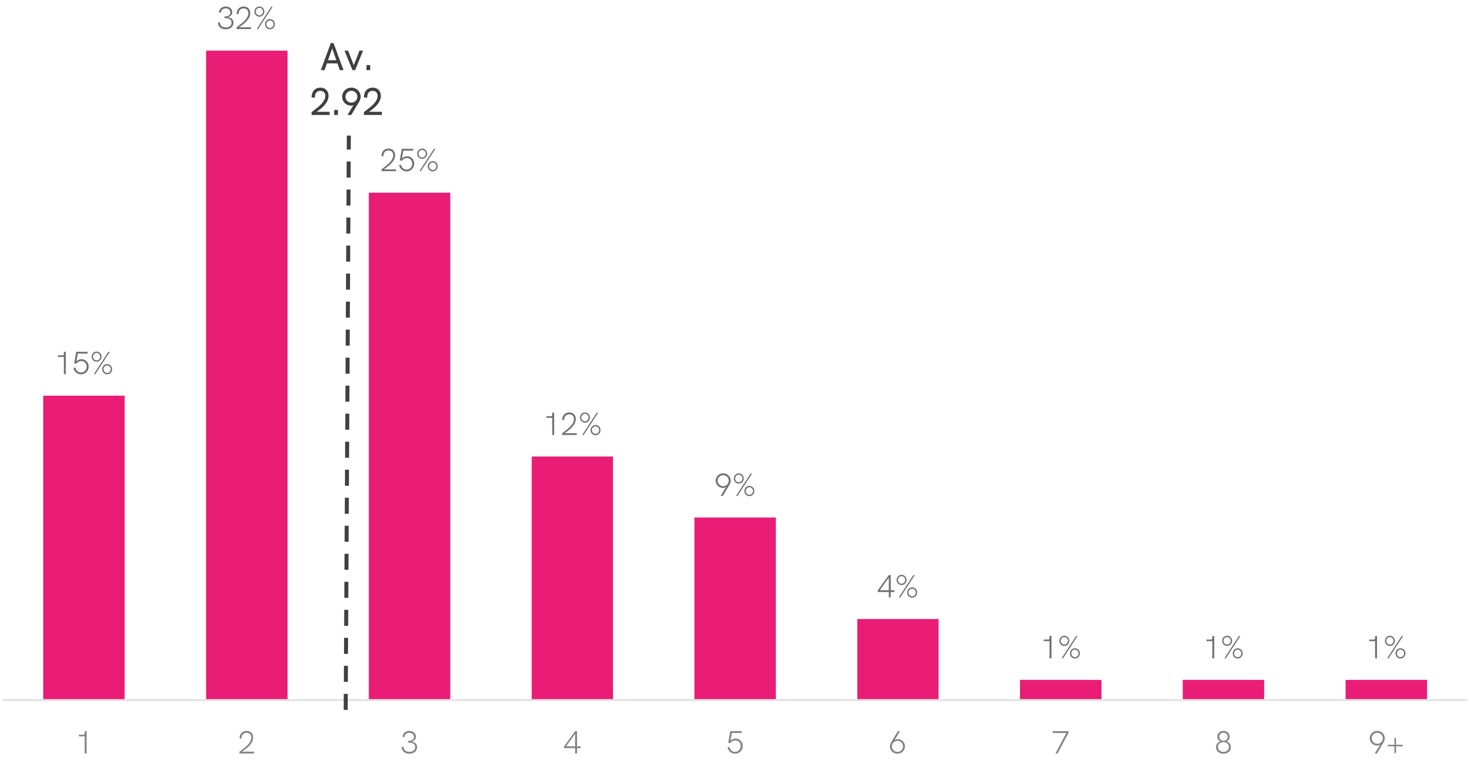
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT – SAMPLE: 609

ENCOURAGING REPEAT PURCHASE

More than half of on premise consumers typically drink 2-3 drinks when visiting a hospitality venue so understanding how they choose their drinks is valuable for brands and operators alike

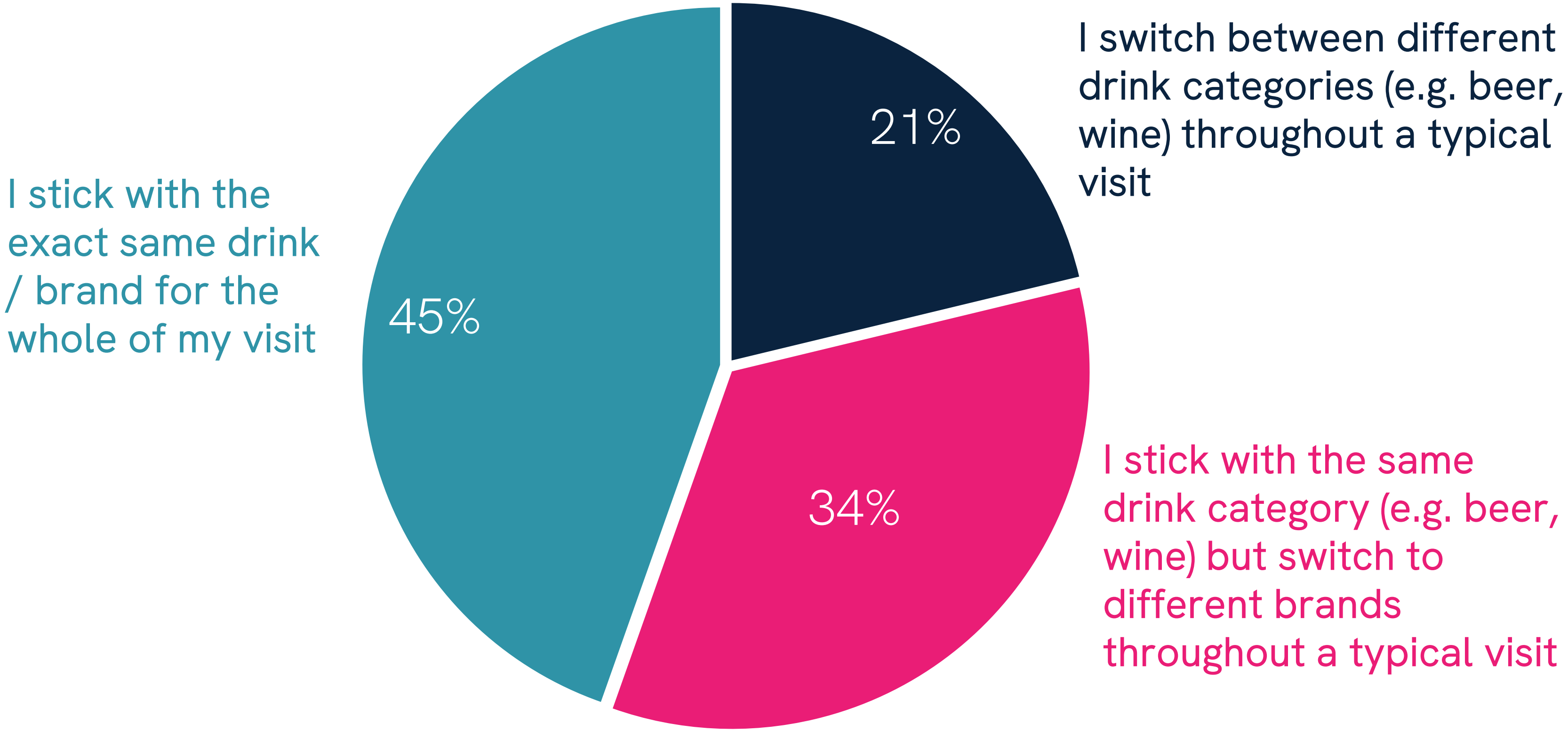
How many drinks would you typically consume in a single visit to a pub, bar, restaurant or other similar venue?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT – SAMPLE: 751

45% of consumers remain loyal sticking to the exact same drink whilst the remaining 55% of consumers switch between different brands and categories

Which of the following statements best apply to your typical drink choices when out?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT – SAMPLE: 749

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On Premise Consumer Path to Purchase

PLANNING VISITS

INSIGHT

- 3 in 5 consumer visits to the On Premise are pre-planned, **half of which are booked through websites or apps.**
- However as consumers build confidence, spontaneity has increased, **driven by a range of influences** such as friends/family (39%) and making up for lost time (30%).
- Barriers to spontaneity still exist, including cost-of-living and COVID concerns, operators must work to reduce these.

HOW FURTHER RESEARCH CAN HELP

- Find out which venues and occasions your category drinkers are pre-planning their visits for to understand where the journey to influencing drinks decision starts.
- Find out what works and what doesn't when designing websites/booking systems

PRE-VISIT DECISION MAKING

INSIGHT

- Pre-venue decision making is a vital avenue that operators and suppliers can influence, **with 1 in 5 consumers making their drink decision before entering.**
- Online platforms can be the first touchpoints for consumers, with 3/4 of consumers interacting with them ahead of visits.
- Consumers who know what they are drinking generally only know the category (73%) **suggesting in-venue opportunities to influence brand decisions.**

HOW FURTHER RESEARCH CAN HELP

- Find out the venues and occasions where your category drinkers are browsing the online drinks. Highlighting which operators you need to work with to optimise online menu content

IN-VENUE DECISION MAKING

INSIGHT

- 4 in 5 consumers do not make drinks decisions until entering the venue at least some of the time, suggesting clear opportunities to influence consumers when they enter the venue.
- A **range of influencers can act here**, including; menu components, promotions/deals and drink visibility. Understanding what this means for different brands and categories is key to best influence consumers.

HOW FURTHER RESEARCH CAN HELP

- Find out how the influencers differ by venue type, occasion and drinks category in order to understand where and when to leverage most influential touchpoints
- Focus marketing and activations spend on the right consumers at the right places

ORDERING PROCESS

INSIGHT

- Although the majority of consumers interact with digital menus (64%), more expect to see physical (70%), **suggesting a balance is needed when utilising digital solutions.**
- Despite preference toward physical, digital menus are growing in popularity and can lead to improved engagement with menus, and tailored promotions can lead to engaging new category/brand drinkers

HOW FURTHER RESEARCH CAN HELP

- Understand where digital ordering is most prevalent to see which operators and partners you can work with to help them optimise digital ordering platforms and elevate your brands

BRAND ADVOCACY/ REPEAT PURCHASE

INSIGHT

- Securing **first drink engagement is crucial for brands**, with many sticking with the same brand for their whole visit (45%), driven by their habitual nature and brand loyalty.
- However over half of consumers switch brands or categories in venue, reinforcing the need to capitalise on **in-venue mechanisms to entice consumers to try brands and engage in experimentation**, a lead drive of switching.

HOW FURTHER RESEARCH CAN HELP

- Understand what drives different consumers to brand selection and how this differs by occasion and channel to support operators with how to best position your brand in the best light.

Contact Us

Get in touch with the CGA team to uncover how the path to purchase in the Australian On Premise has evolved, and to explore the full slide deck.

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