

# On Premise Path to Purchase Report

Understanding consumer purchasing dynamics to optimize investment in the On Premise channel

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# 47%

Of consumers prefer having **different drinks**  
when in **the On Premise** compared  
to when they're at home

**+27pp for Gen Z**





## It's more important than ever to understand the consumer's path to purchase

There are numerous touchpoints in a consumer's journey that influence their decisions about which category, brand, and type of serve they select in the On Premise, making it essential you are investing in the most effective levers that drive sales and maximize return on investment.

Consumers now have more access to information than ever before, making it crucial for suppliers that they are involved throughout the entire journey.

### *Key questions to ask the organization:*

- + How are we investing in the On Premise in order to optimally attract consumers to our categories and brands?
- + How are we supporting our customers in maximizing their sales, which ultimately boosts our own?



# CGA On Premise experts are here to help you build your On Premise strategies

A long term, strategic approach to grow brands in Canada's On Premise

## *Step one*

Our team of experts will help you, and your operator partners understand the **most effective areas** to invest for a successful On Premise path to purchase strategy.

Focusing on current consumer behaviours, our research will enable you to understand exactly how consumers are influenced.

## *Step two*

Our bespoke custom studies centred around key focal areas will help you uncover strategies that will maximize crucial areas of the path to purchase, for example:

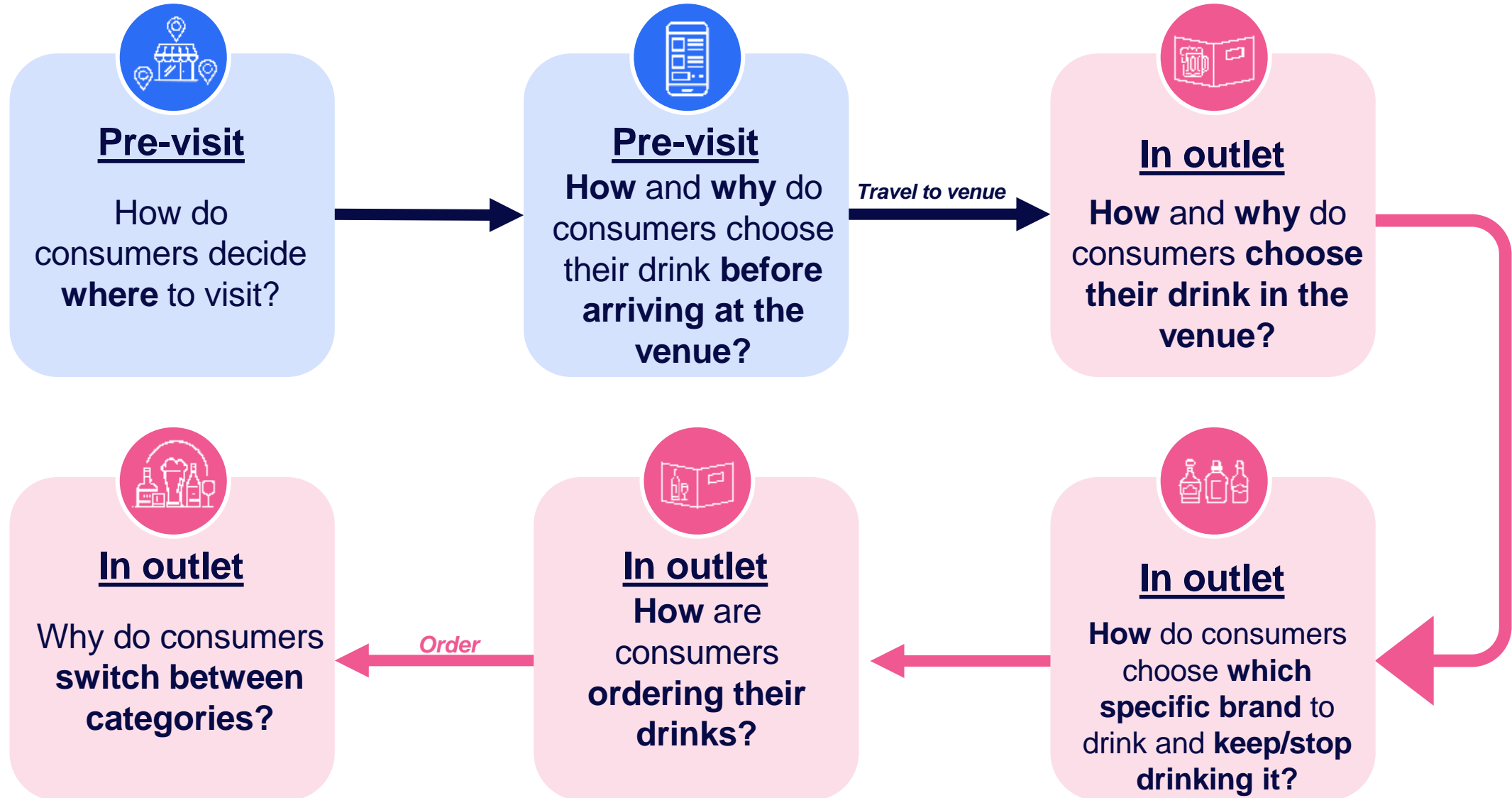
- + Point-of-sale and activation recommendations to ensure your brand is positioned for success
- + Menu design and how this can boost sales for your brand
- + Best practice for brand placement on taps



# How the Report can help your business

- Understand the comprehensive nature of the path to purchase for consumers across different categories and venue types.
- Apply granular and tailored insights across the categories your portfolio plays in to your On Premise strategy; thereby better enabling the sales organization to win.
- Identify the essential opportunities and threats for your categories, throughout the consumer's path to purchase. To then use these insights to prioritize investment and defend risks.
- Provide industry knowledge for your operating partners through supporting their business efforts with credible, third-party insights from global and local leaders in On Premise research.
- In short, to bring unique and relevant insights about consumer decision-making right to the heart of strategy building, and investment allocation for the On Premise channel.

# The report covers every step of the customer journey





# How the Report works

The study examines the overall path to purchase and the factors influencing a consumer's drink choices.

By exploring the last occasion consumers visited the On Premise and the journey they took during that visit, it provides insight into the consumer journey from multiple perspectives, including occasions, channels, and drink categories.

## *The report structure:*

1

An overview of when consumers make their decision of what to drink in the On Premise

2

An analysis of how they are choosing categories and brands highlighting at what stage you should be engaging with consumers

3

A deep dive into how consumers purchasing decisions are influenced and the methods of ordering

# On Premise Path to Purchase Core Report: Key Details

The new Path to Purchase study provides a detailed understanding of how consumers are influenced before a drink purchase and how suppliers can drive sales, helping clients determine where to spend to influence consumer choice in the On Premise. **The report will explore:**



## *Occasions & Dayparts*

- + When do consumers visit
- + What drives foot traffic
- + Early visitation vs nightlife
- + Food-led vs drink-led visits



## *Channel Segments*

- + Size of the prize by On Premise venues
- + Dynamics most influential by On Premise segments



## *Cross-Category Purchasing*

- + How many brands are chosen by an individual on one visit
- + Do consumers purchase multiple categories
- + Likelihood to experiment in new & preferred categories
- + Factors in changing drink choice across brands and categories



## *Pre-Venue vs In-Venue Dynamics*

- + Drivers to venue choice
- + Menu & drink offering familiarity pre-visit with social media influences
- + Physical vs digital menu preferences
- + Bartender & staff influences
- + LTO's, special's, branded POS, etc.



## *Category Specific Dynamics*

- + What drives decision making within specific categories
- + Brand-led vs category-led
- + Serve size, format, presentation
- + Flavours & descriptions
- + Trial & experimentation

**Understand when and how consumers are making their drink choice and how different levers should be pulled dependent on the categories your brands play in**



# Categories covered in the Report



## Spirits & Cocktails

- + Vodka
- + Whiskey
- + Rum
- + Tequila
- + Gin
- + Cognac
- + Cocktails & Cocktail Types
- + Shots



## Beer & Cider

- + Domestic
- + Import
- + Craft
- + Cider



## Non-Alcoholic

- + Soft Drinks
- + Energy Drinks
- + Coffee
- + Sparkling Water



## Ready-to-Drink

- + Hard Seltzer's
- + Spirit-Based RTD's



## Wine

- + Sparkling
- + Table

# Bespoke, Custom Research Reporting

Capabilities and example outputs

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# In-outlet research covers multiple methods to tell the full story of On Premise purchase decision making

We have conducted **multiple path to purchase** projects in countries across **North America, Europe, and APAC regions**. These range from robust online surveys providing **quantifiable data around consumers' conscious decision making** to in-depth studies incorporating **eye tracking** and **'in the moment' feedback** from venue visitors during active trips to the On Premise, accounting for **subconscious behaviours** too.



## *Eye tracking*

Customers within outlets will be asked to participate in the study and given eye tracking glasses to capture authentic, natural behaviour

Analysis of browsing, consideration and purchase, tracked with heat maps through eye tracking will capture subconscious elements within decision making



## *Qual interviews & quant in moment surveys*

Following purchase, consumers will then be asked to partake in a short, qualitative interview to understand the conscious drivers of choice and any influential factors that had impacted decision

This will be followed by a quantitative survey to provide data with which our clients can base successful investment decisions



## *Ethnography observation*

Further detail can be added with an ethnographic phase of research, with CGA experts observing consumers making purchase decisions, before then interviewing consumers around why choices were made to understand the path to purchase in detail

Ethnographic observation allows for natural behaviour to be observed and then qualified



## *Menu Optimization*

Heat mapping menu examples and designs to understand most effect points of emphasis on menus and how you can work with suppliers to effectively position products



## *Assortment*

Choice based exercises for consumers to make decisions on which brands they would choose when given specific scenarios for a select amount of brands on offer and at varying price points

# For more information on how CGA's Path to Purchase Report can help your business, contact a member of the team:



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