

A group of people are gathered around a table, holding up glasses of refreshing drinks. The drinks are garnished with fresh lemons and mint leaves. The scene is set in a bright, outdoor or semi-outdoor environment, possibly a patio or a modern lounge. The people are engaged in conversation and appear to be enjoying their drinks. The overall atmosphere is social and relaxed.

ITALY ON PREMISE CONSUMER PULSE REPORT

CGA by NIQ, January 2025

SUMMARY

- **Visitation Rate in January:** On Premise visitation remained stable from December to January, with drink-led visits increasing year-over-year but a slight decline in weekly frequency. Weekends remain the busiest, with Saturday leading and Sunday close to Friday. As the festive season ended, late evening and night outings declined, with consumption shifting to earlier dayparts.
- **Categories Drunk:** Beer, aperitifs, and cocktails remain the top three categories by penetration, while energy drinks saw the highest month-on-month growth. Hot drinks are highly valued for quality and affordability, while cocktails and aperitifs continue to drive innovation.
- **Prognosis for February:** Fewer consumers plan to visit the On Premise next month compared to last year. However, over 1 in 5 intends to go out more often, outweighing the 1 in 10 planning to reduce visits, resulting in a positive net outlook.
- **Hot topic – Holiday consumption:** Nearly 1 in 3 consumers went out more often during the holidays, primarily to seasonal venues like Christmas markets. Economic pressures however led to more cautious spending, with consumers opting for fewer and lower-cost drinks. Looking ahead to 2025, value for money and promotions will be key, alongside increased demand for healthier options. Participation in Dry January grew, with 2 in 5 abstaining and 1 in 2 reducing alcohol intake, mainly for health reasons. Interest in no/low alcohol alternatives is rising, with mocktails and virgin cocktails leading the category – presenting an opportunity for brands to innovate with elevated serves, new flavour profiles, and functional benefits.



Valeria Bosisio

Client Success & Insights
Manager - Italy
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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 January and February 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 **January 2025** issue, we surveyed 751 consumers (aged 18+) between January 20th – 27th 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



83%

of consumers have been out to eat in the previous month

=0pp vs January Last Year

55%

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

+3pp vs January Last Year



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2024, JANUARY 2025 – SAMPLE: 750 - 751

LOOKING BACK

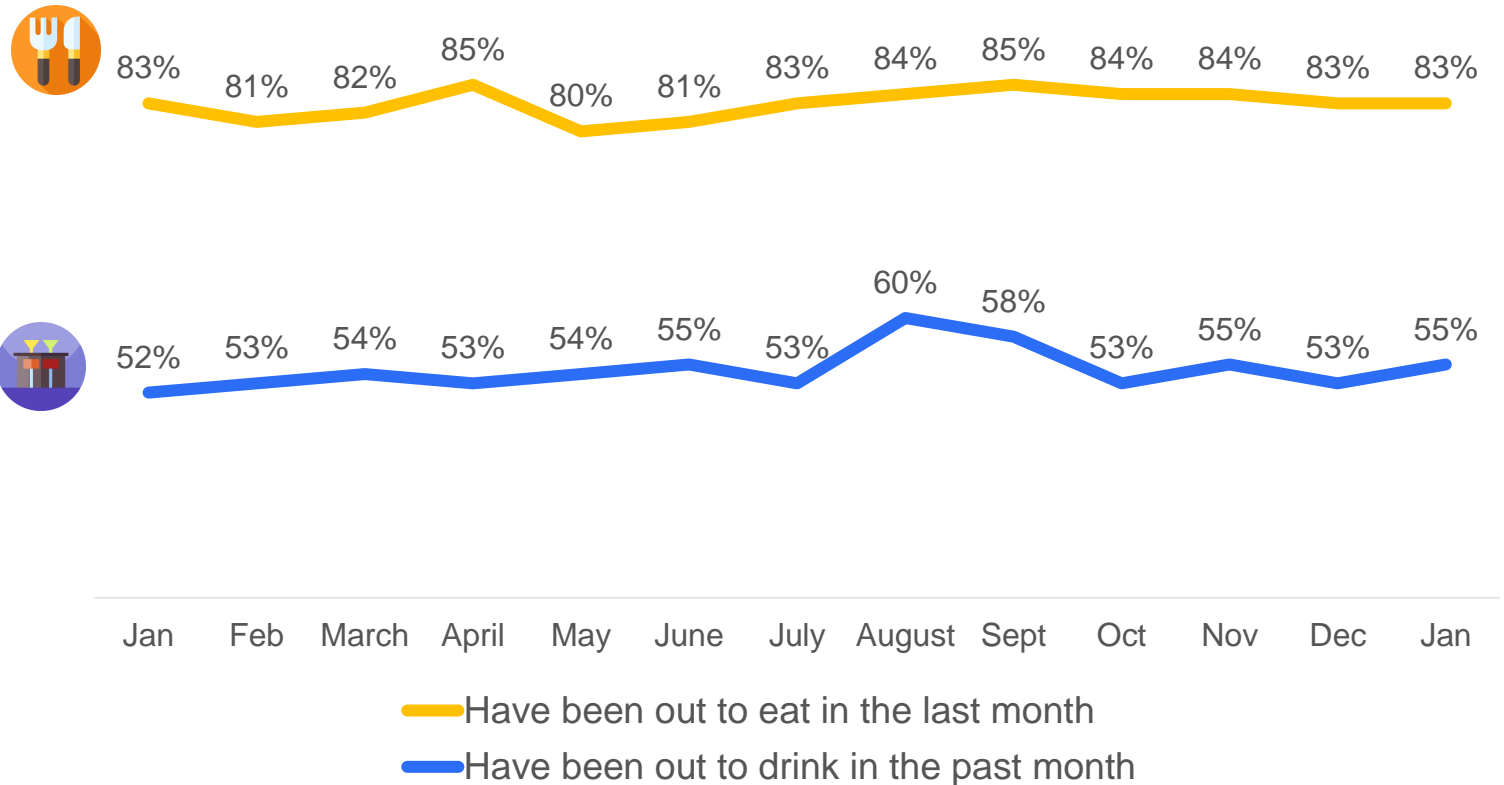


95% of consumers visited the On Trade this month

=0pp vs January 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 DECEMBER 2024 – SAMPLE: 750 - 751

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



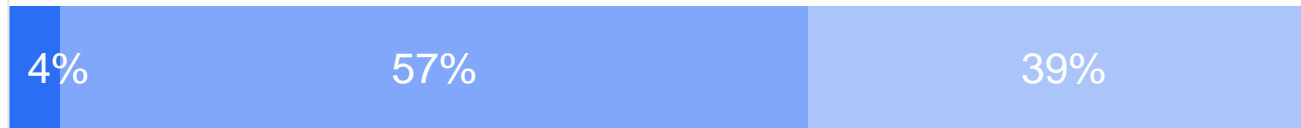
-2pp vs January Last Year

-7pp vs January Last Year

+9pp vs January Last Year



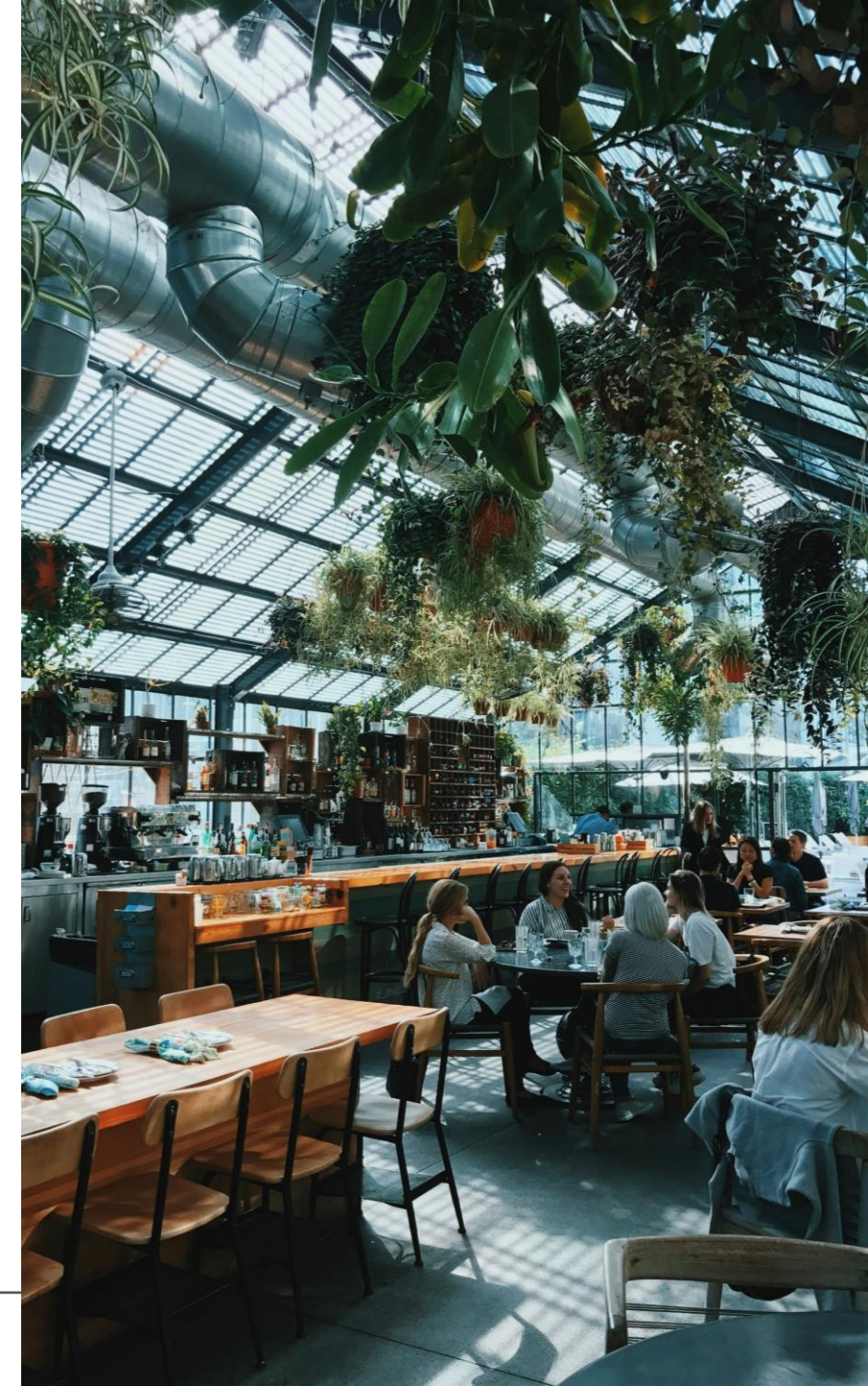
To Drink



To Eat



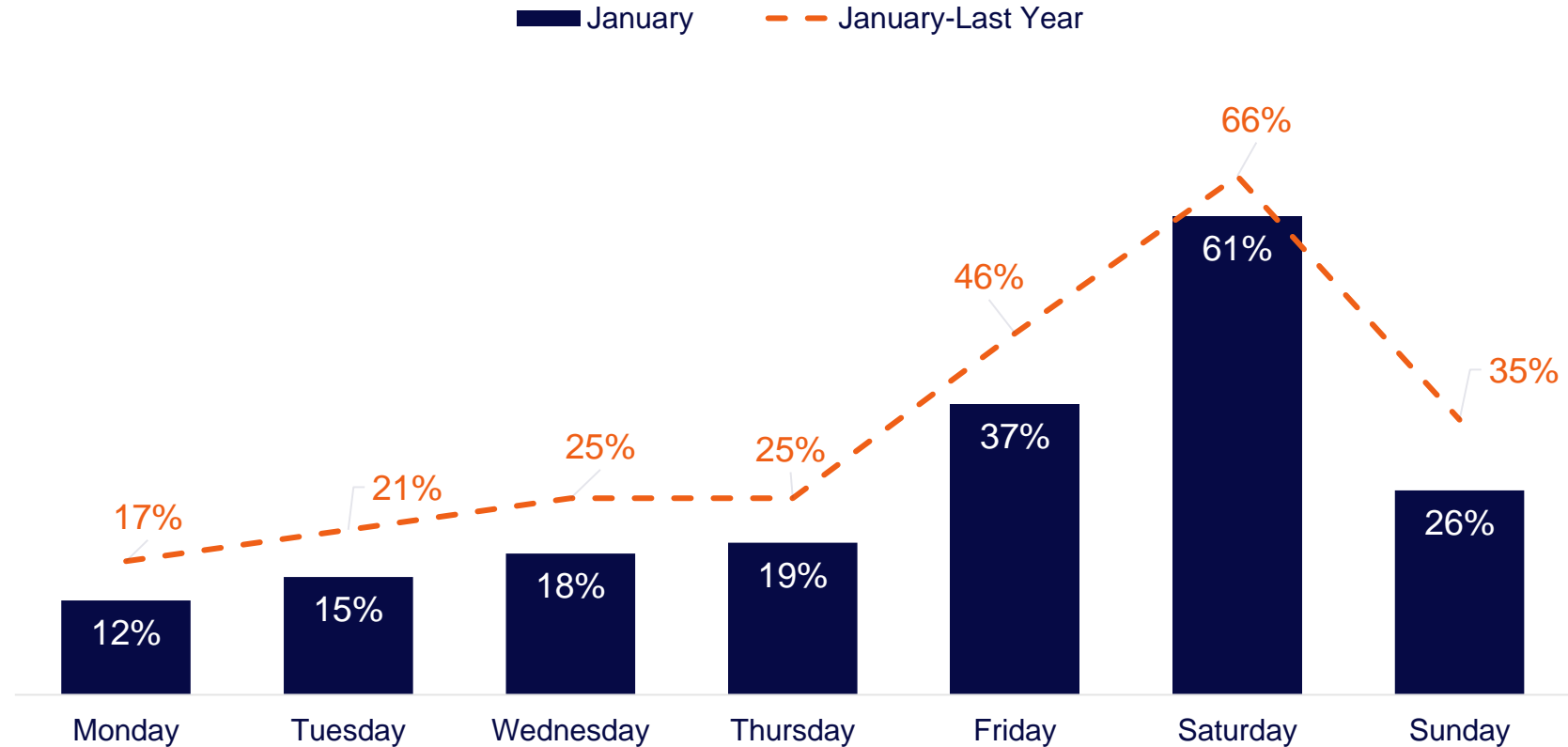
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2024, 2025 – SAMPLE: 411 - 716





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

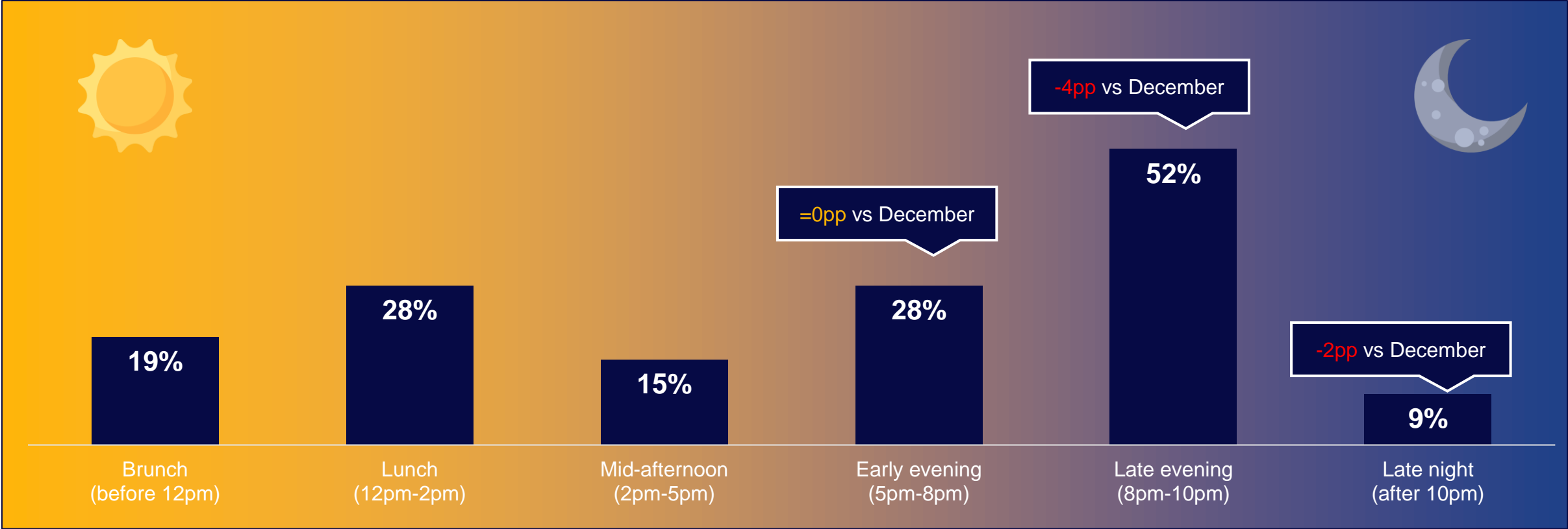
Day of the week visiting the on-premise



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2024, 2025 – SAMPLE: 714 - 716

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

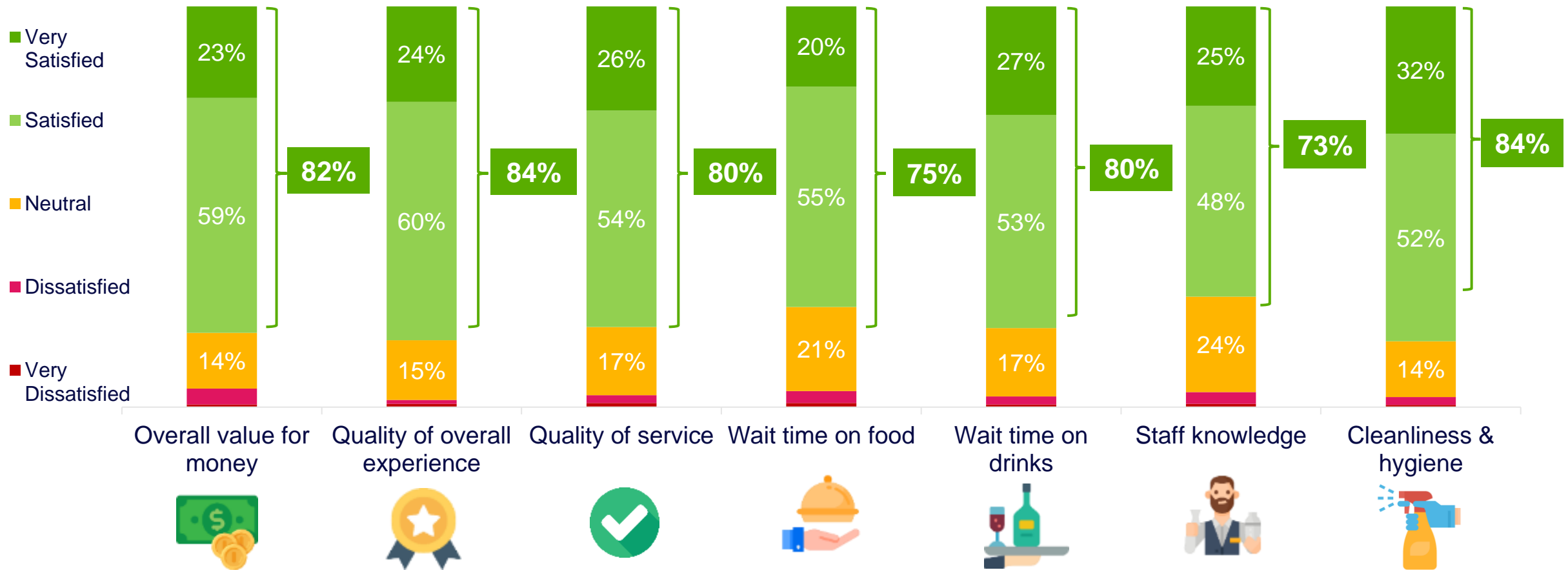
Time of day for visiting the On-Premise



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2024; JANUARY 2025 – SAMPLE: 716 - 722

SATISFACTION WITH MOST RECENT VISIT TO THE ON PREMISE

Proportion of consumers very satisfied/satisfied with...



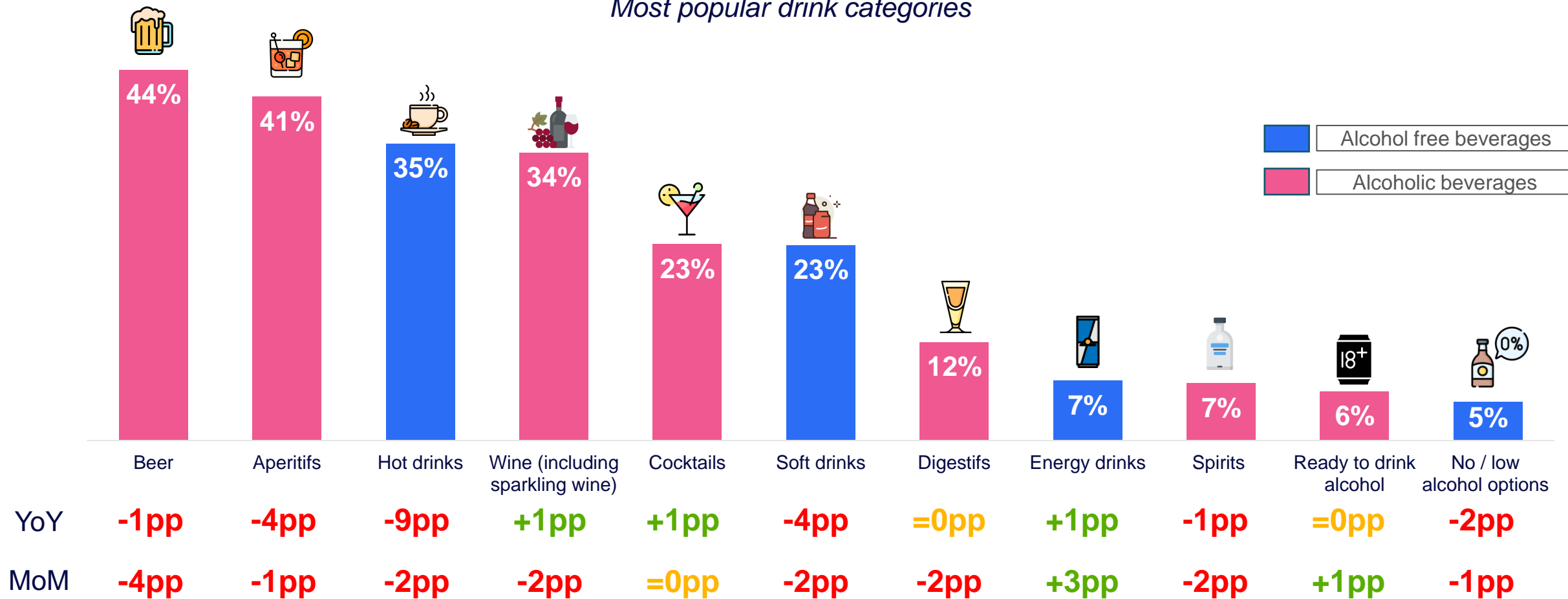
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025- SAMPLE: 409 - 750

Key metrics: Categories Drunk



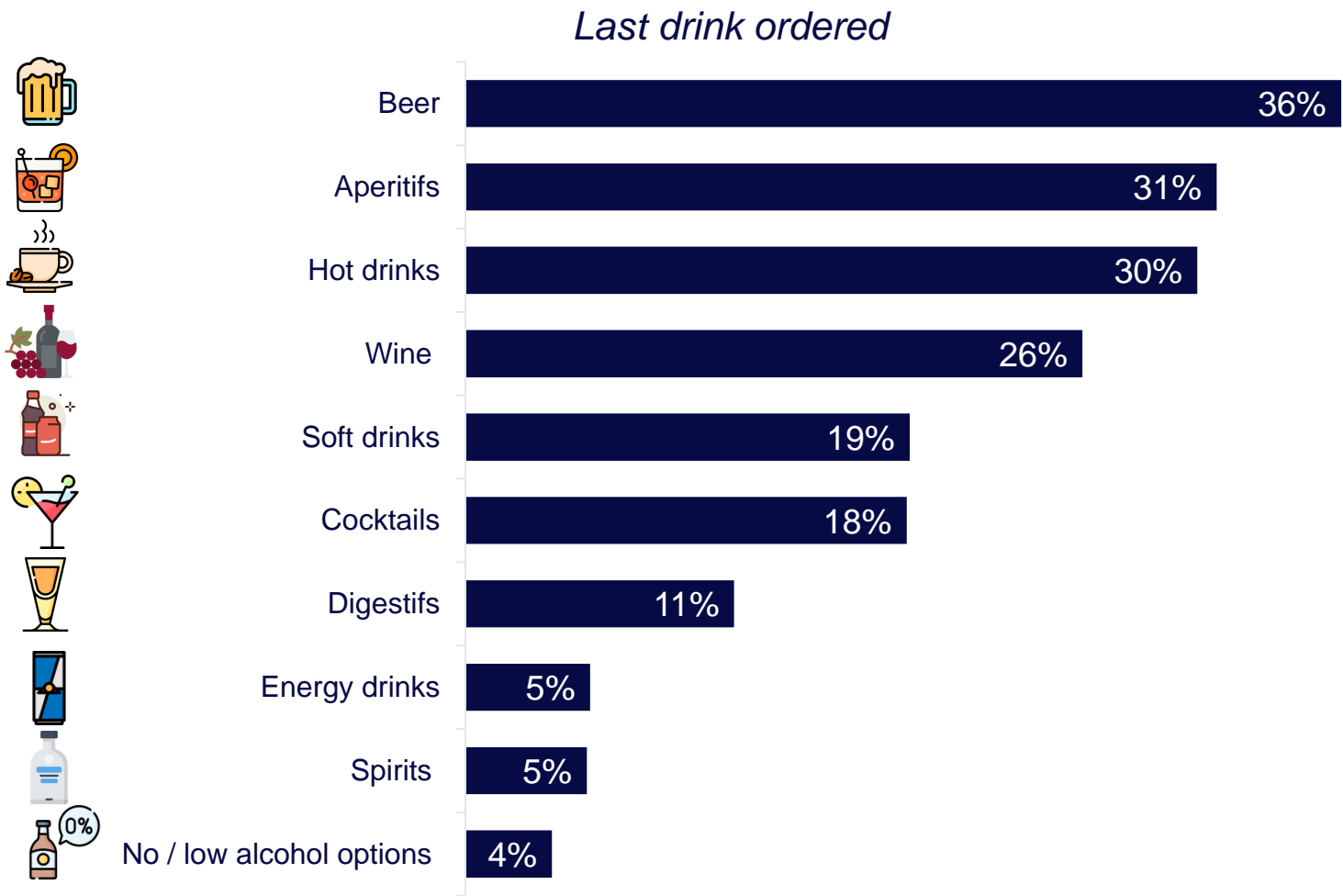
WHICH OF THE FOLLOWING DRINKS HAVE YOU DRANK IN BARS AND/OR RESTAURANTS IN THE PAST MONTH?

Most popular drink categories



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2024, JANUARY 2025, JANUARY 2024 – SAMPLE: 714 - 723

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 JANUARY 2025 – SAMPLE: 751

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** 



Beer	Hot Drinks	Soft Drinks	Aperitifs	Wine	Digestifs	Spirits	Ready to Drink Alcohol
87%	85%	84%	84%	82%	80%	78%	78%

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025- SAMPLE: 23 - 274

HOW SATISFIED WERE YOU WITH THE DRINK(S) THAT YOU HAVE HAD ON YOUR MOST RECENT VISIT REGARDING **HOW EXCITING IT IS?**

Shown to individual drink category consumer on latest visit

% **very satisfied** / **satisfied** with **how exciting the drink was*** 🌟



Spirits

Aperitifs

Digestifs

Cocktails

Wine

Beer

Hot Drinks

Soft Drinks

89%

87%

87%

85%

81%

79%

78%

78%

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025- SAMPLE: 38 - 273

HOW SATISFIED WERE YOU WITH THE DRINK(S) THAT YOU HAVE HAD ON YOUR MOST RECENT VISIT REGARDING HOW **QUALITY OF SERVE**?

Shown to individual drink category consumer on latest visit

% **very satisfied** / **satisfied** with **the quality of serve**



Aperitifs	Beer	Digestifs	Wine	Soft Drinks	Cocktails	Hot Drinks
90%	88%	88%	87%	84%	84%	83%

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025- SAMPLE: 84 - 273



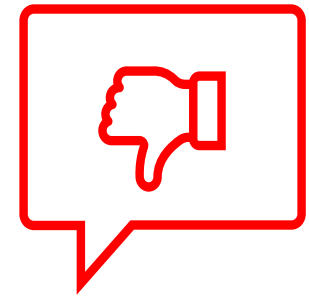
HAVE YOU TRIED A NEW DRINK WHEN EATING OR DRINKING OUT OVER THE PAST MONTH?

- +26pp for Gen-Z consumers
- +1pp for Roman consumers
- +10pp for Milan consumers



26%

Yes



74%

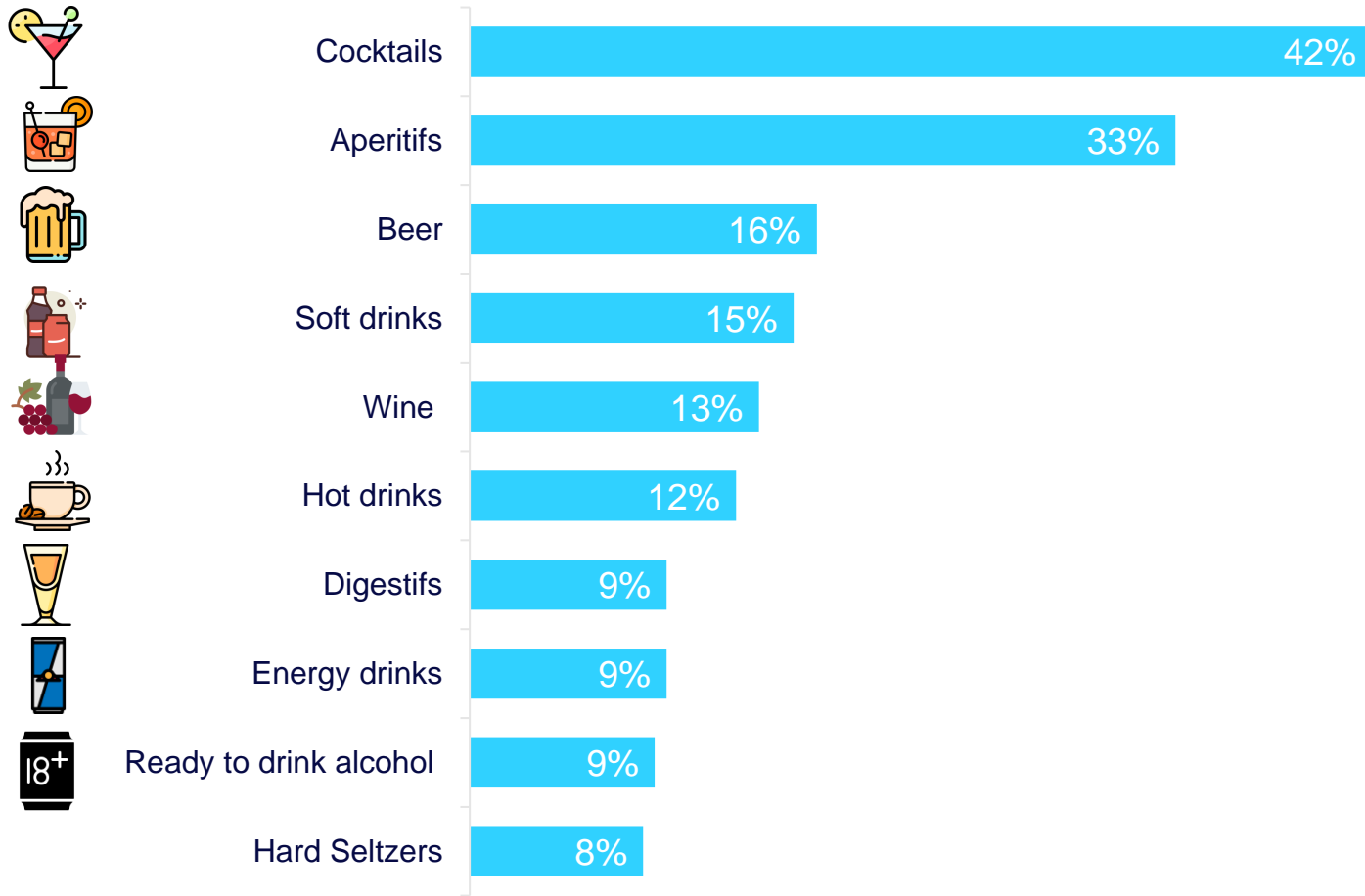
No

0pp vs December

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2024; JANUARY 2025 – SAMPLE: 115 - 723

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

New drinks tried by those going out to food and drinks



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 186

Key metrics: Next Month Prognosis





77%

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

-9pp vs January Last Year

40%

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

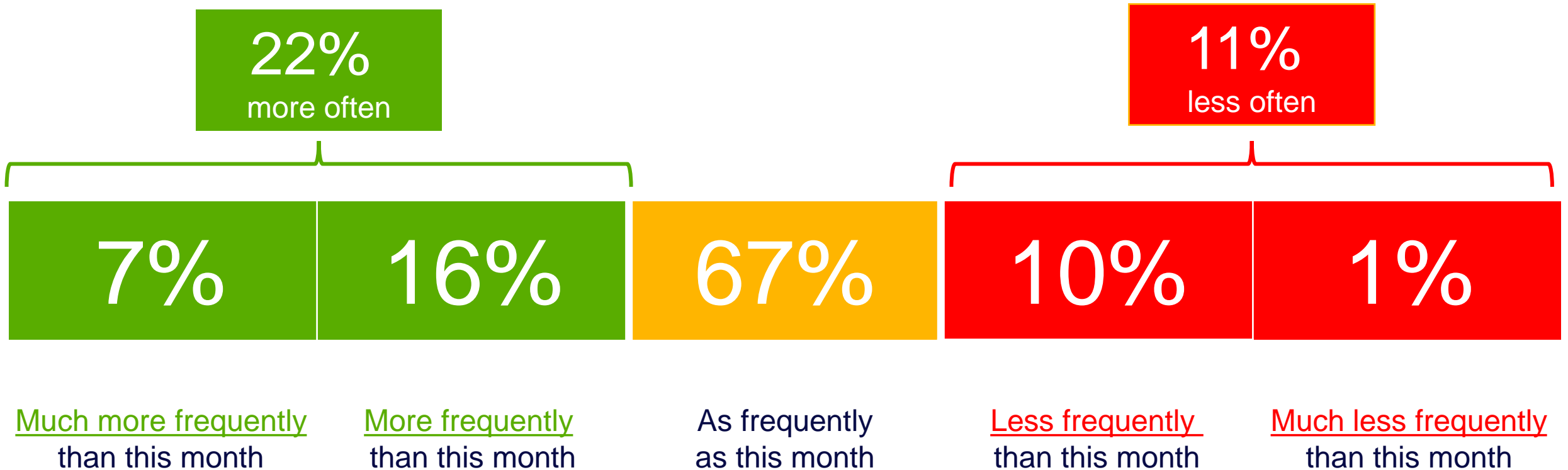
-17pp vs January Last Year



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2024, 2025 – SAMPLE: 750

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

Asked to those planning to visit the On Premise in the next month



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 712

Hot Topic: Holiday Consumption





COMPARED TO YOUR USUAL BEHAVIOUR THROUGHOUT 2024, HOW OFTEN DID YOU GO OUT TO EAT AND/OR DRINK OVER THE CHRISTMAS PERIOD?



29%

I went out more often during the Christmas period



40%

I went out the same amount during the Christmas period



23%

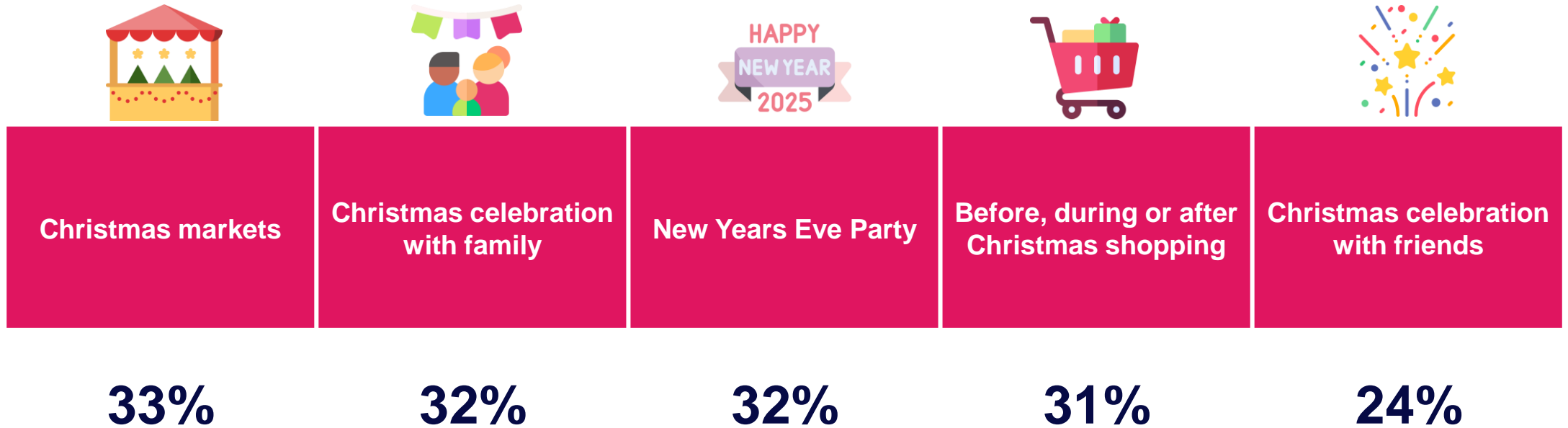
I went out less often during the Christmas period

8% didn't go out at all during Christmas period

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 751

DID YOU GO OUT TO EAT/ DRINK OVER THE 2024 CHRISTMAS PERIOD, FOR ANY OF THE FOLLOWING OCCASIONS? PLEASE SELECT ALL THAT APPLY

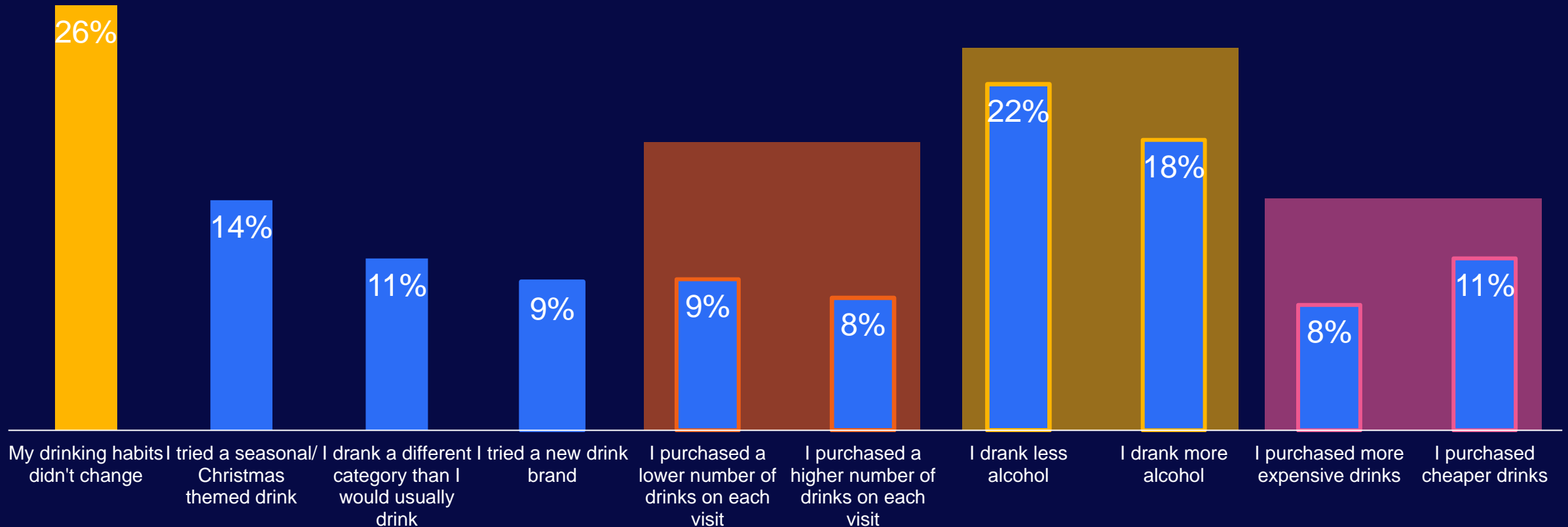
Top 5 most popular occasions for visitation over the Christmas period



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 691

IN WHICH OF THE FOLLOWING WAYS, IF ANY, DID YOUR DRINKING HABITS CHANGE WHEN VISITING EATING AND DRINKING OUT VENUES OVER THE 2024 CHRISTMAS PERIOD? PLEASE SELECT ALL THAT APPLY

Changes in consumers drinking habits during the Christmas period



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 54 - 691

Hot Topic: New years Resolutions



NielsenIQ



WHICH OF THE FOLLOWING WILL BE IMPORTANT TO YOU WHEN EATING AND/OR DRINKING OUT IN 2025?

Good value food/ drink options



51%

Deals and promotions



36%

Local food/ drink options



32%

Better variety of food/ drink options



28%

Health-conscious options



24%

Cheap food/ drink options



22%

Entertainment in venues



21%

New and innovative food/ drink options



17%

Immersive experiences



14%

More sustainable/ eco-friendly options

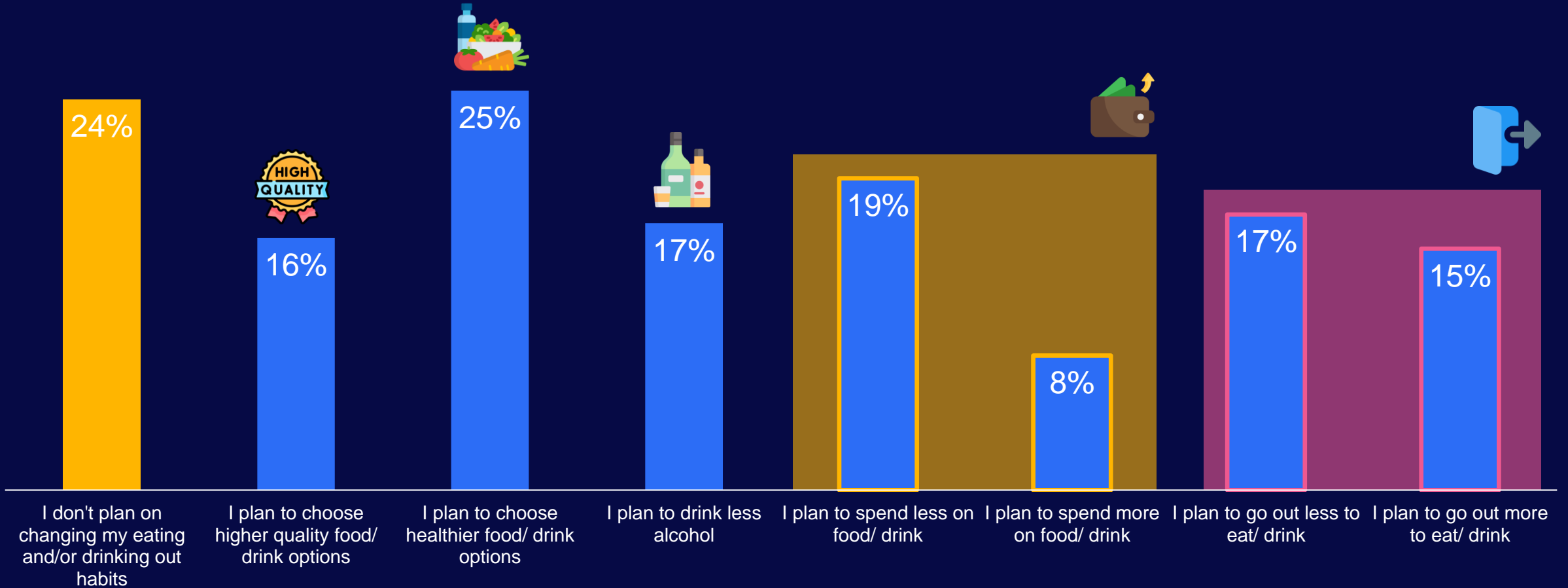


13%

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 751

WHAT ARE YOU PLANNING TO PRIORITISE THIS YEAR WHEN IT COMES TO EATING AND DRINKING OUT IN 2025?

Consumption prognosis for 2025



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 112 - 687



Hot Topic: Dry January



ARE YOU CURRENTLY PARTICIPATING IN DRY JANUARY?

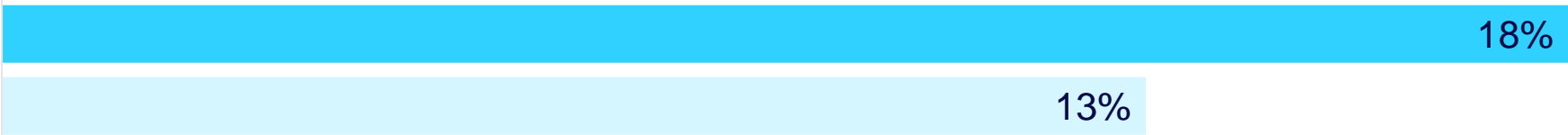
■ Participation rate in 2025 ■ Participation rate in 2024



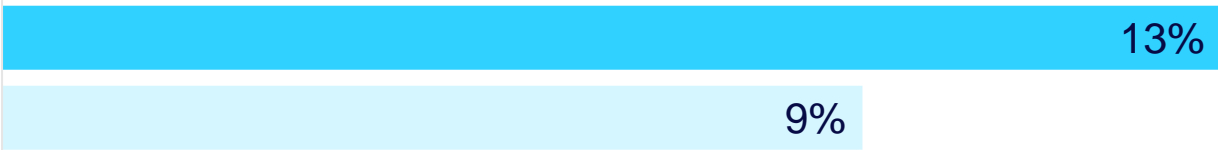
France



Germany



Italy



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 1000 - 750

THROUGHOUT DRY JANUARY, HAVE YOU CHANGED HOW OFTEN YOU VISIT PUBS, BARS, RESTAURANTS OR OTHER SIMILAR VENUES BECAUSE YOU ARE TAKING PART IN DRY JANUARY?



13%

I have visited **more** often than usual



23%

I have visited the same amount as usual

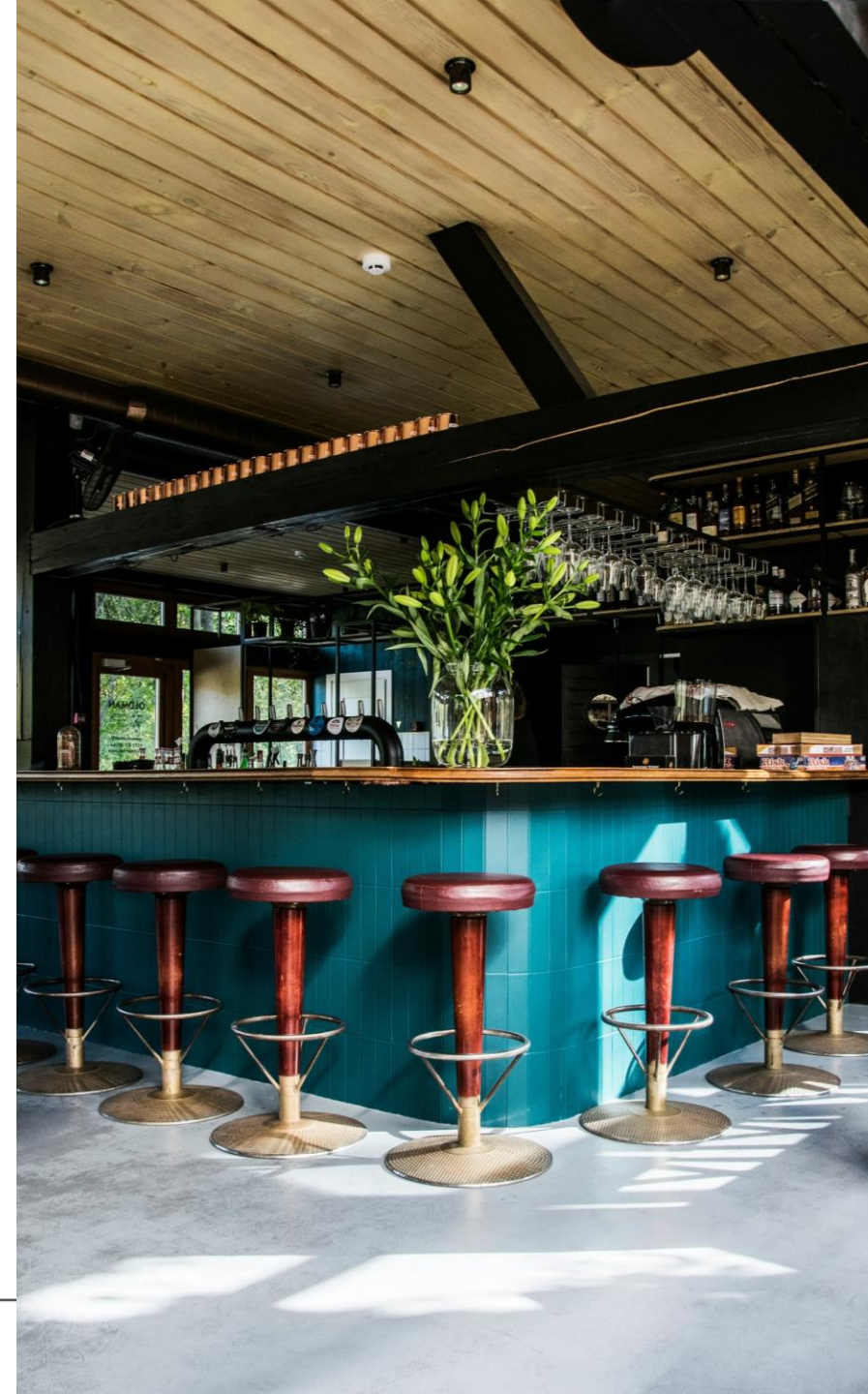


60%

I have visited **less** often than usual

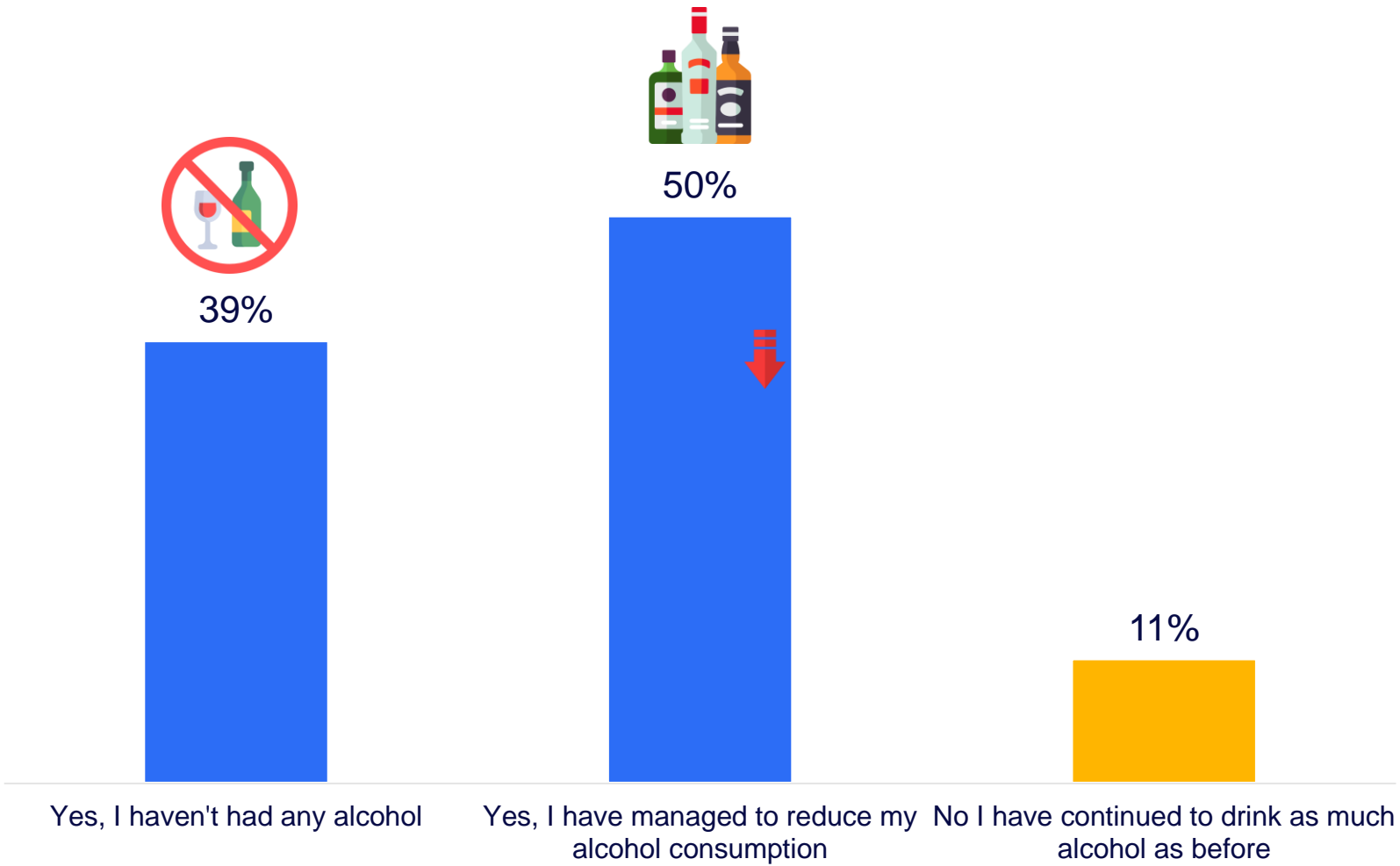
4% didn't visit venues at all during Dry January

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 122





HAVE YOU ABSTAINED FROM ALCOHOL DURING DRY JANUARY AS YOU INTENDED SO FAR?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 122

WHY DID YOU PLAN TO TAKE PART IN DRY JANUARY?



To be healthier

39%



To save money

24%



Influenced by social media

23%



To decrease my alcohol intake

22%



My social group/peers are taking part

20%



Other family members are taking part

20%



My partner is taking part

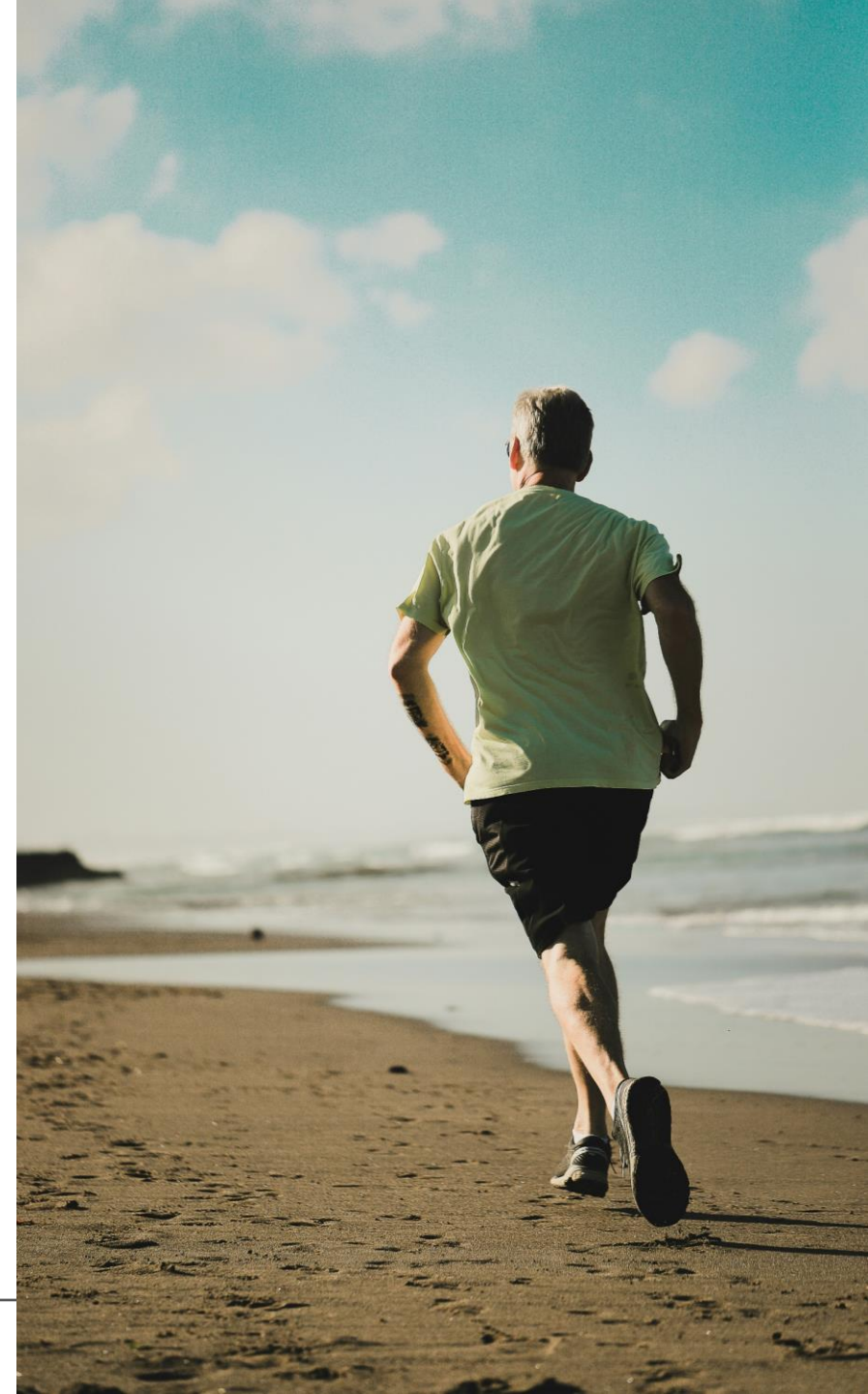
15%



There are better non-alcoholic options available

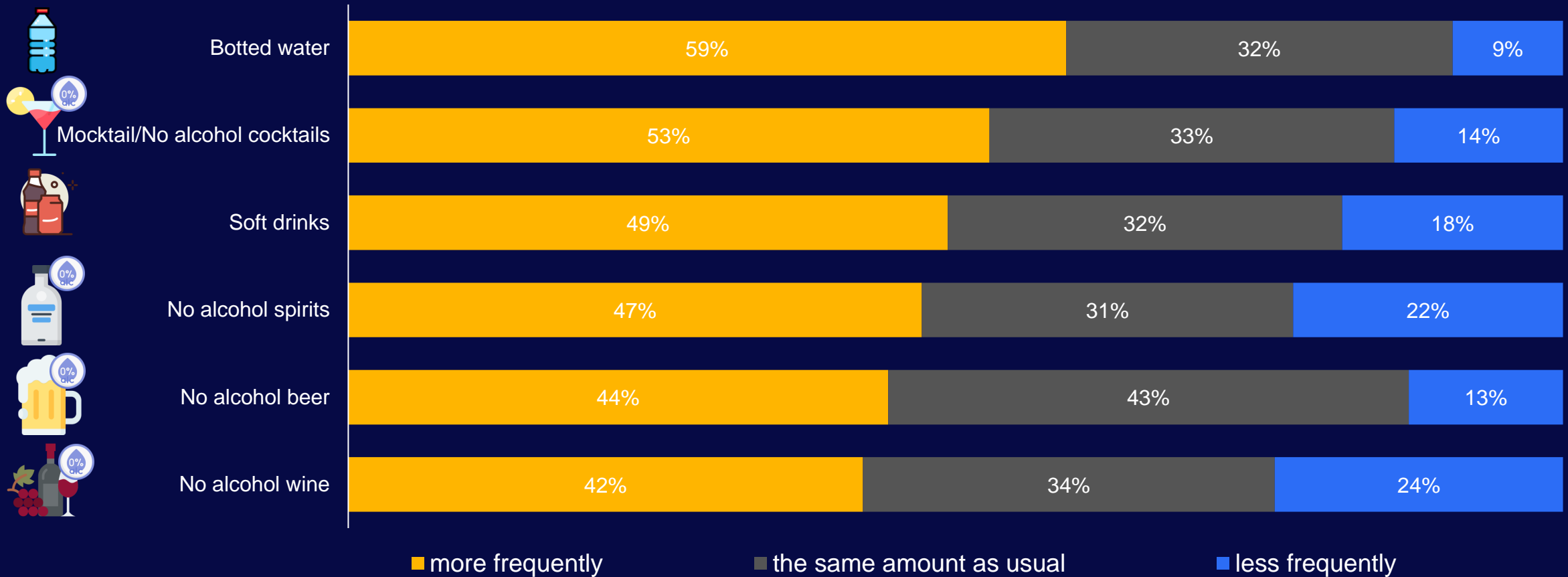
15%

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 122



HAVE YOU DRANK ANY OF THE FOLLOWING DURING DRY JANUARY?

I drank this...during dry January



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 59 - 88

HAVE YOU DRANK ANY OF THE FOLLOWING DURING DRY JANUARY?

Consumers who drank the following categories for the first time while participating in Dry January

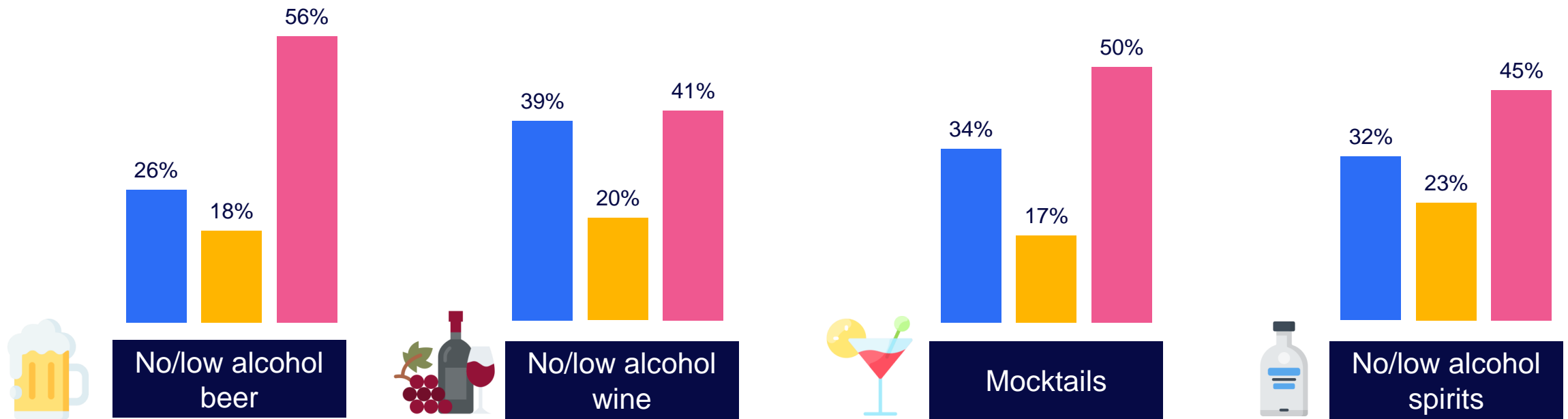


SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 122

YOU HAVE SAID YOU DRANK THE FOLLOWING DRINKS IN DRY JANUARY. WHERE DID YOU DRINK THESE?

Consumers who drank the following categories while participating in Dry January

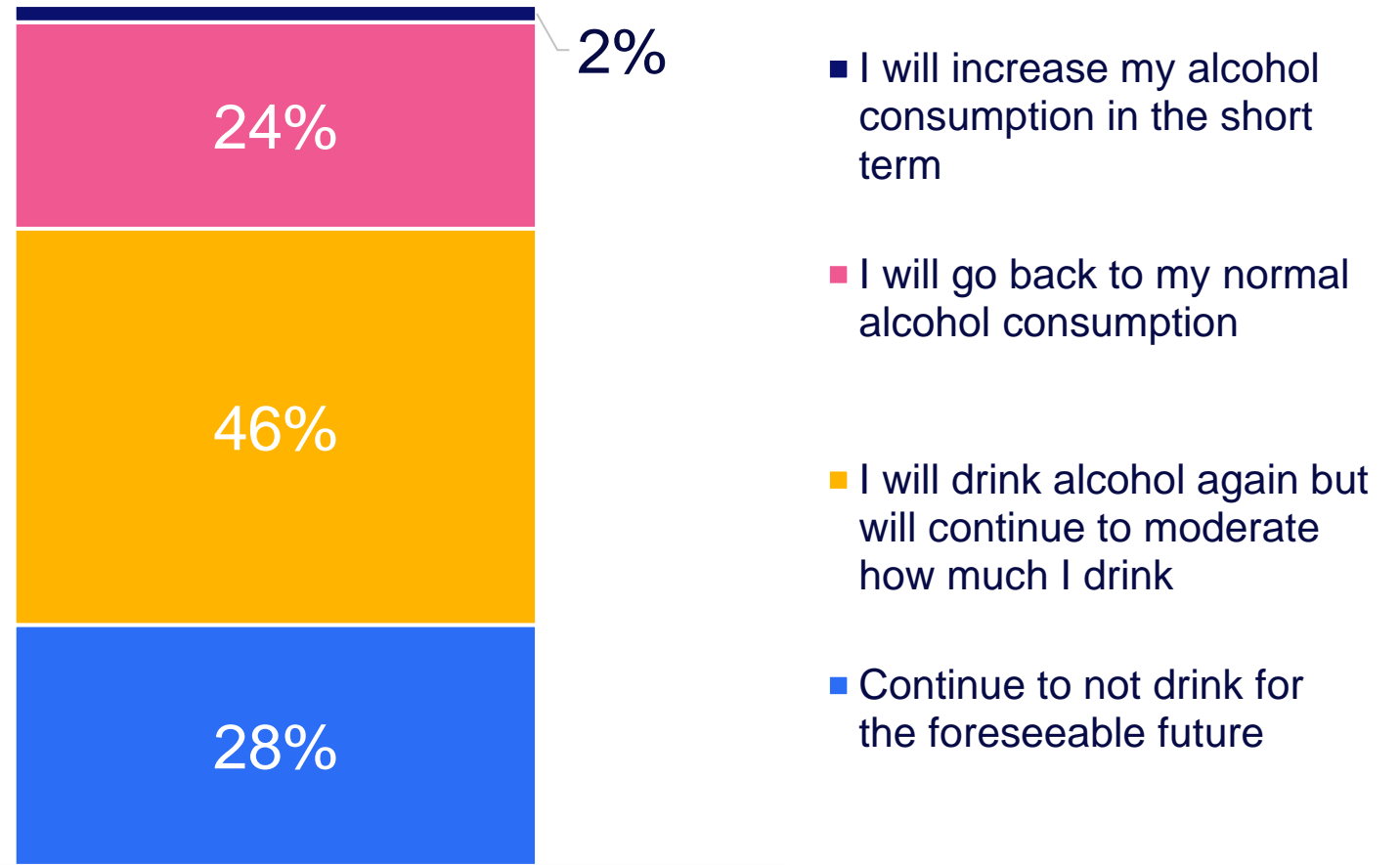
■ At home ■ Both ■ Out at pubs, bars, restaurants etc



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 88 - 101



WHICH OF THE FOLLOWING DO YOU PLAN ON DOING WHEN DRY JANUARY ENDS?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JANUARY 2025 – SAMPLE: 122

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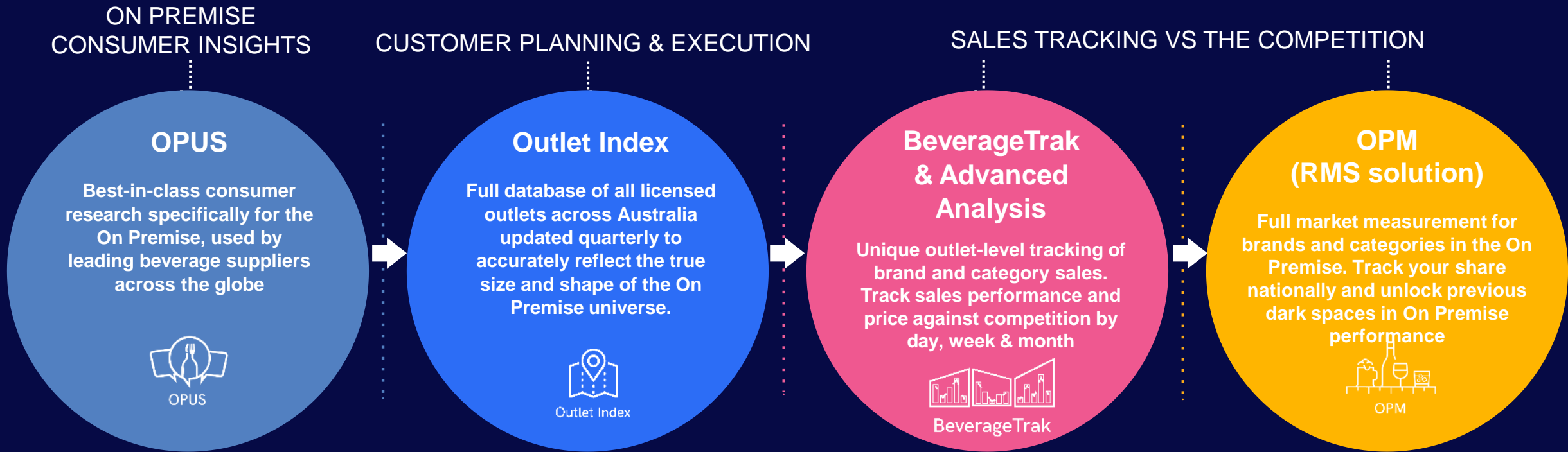


NIQ



CGA by NIQ's On Premise Roadmap & Solutions

This suite of solutions is designed to help beverage suppliers grow their On Premise sales via commercially-focused insights and customer profiling data. Over time, this phased approach leads to full market measurement (RMS) and competitive share tracking.



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
Italian On Premise, get in
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