

A background photograph of a group of people at a social gathering, holding up glasses of refreshing drinks with ice, lemons, and mint. The image is slightly blurred, creating a sense of movement and social atmosphere. A large dark blue circle is overlaid on the left side of the image, containing the title and subtitle text.

ITALY ON PREMISE CONSUMER PULSE REPORT

CGA by NIQ, December 2025

NIQ



Drive momentum among visitors to capitalize on increased visit frequency in December

Strong visitation, evolving drink choices, and a thirst for innovation signal big opportunities for growth

Visitation remains strong

97% of consumers visited On Premise venues in December; eating out (87%) and drinking out (57%) both up vs last year. Consumer engagement with the channel is resilient, signalling continued demand despite seasonal fluctuations.

Reinforce presence in high-traffic venues and optimize offerings for both food-led and drink-led occasions.

Drink category choices show clear seasonal leaders

Aperitifs, bottled water, beer, and hot drinks dominate consumption; cocktails and digestifs show growth opportunities. Core categories remain essential, but premium and experiential drinks can drive incremental spend.

Prioritize assortment strategies around top categories while promoting cocktails and digestifs to capture upsell.

Innovation appetite among younger cohorts

24% tried a new drink last month (+19pp for Gen Z); cocktails lead new trial. Younger demographics are driving experimentation, creating opportunities for NPD and premiumization.

Launch targeted activations for Gen Z in urban hubs (Rome, Milan) and spotlight innovative serves in cocktails.



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 October and December 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 **December 2025** issue, we surveyed 750 consumers (aged 18+) between December 20th – 24th 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



87%

of consumers have been out
to eat in the previous month

+4pp vs December last year

57%

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

+3pp vs December last year



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2024, 2025 – SAMPLE: 750 - 752

NIQ

CGA
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LOOKING BACK



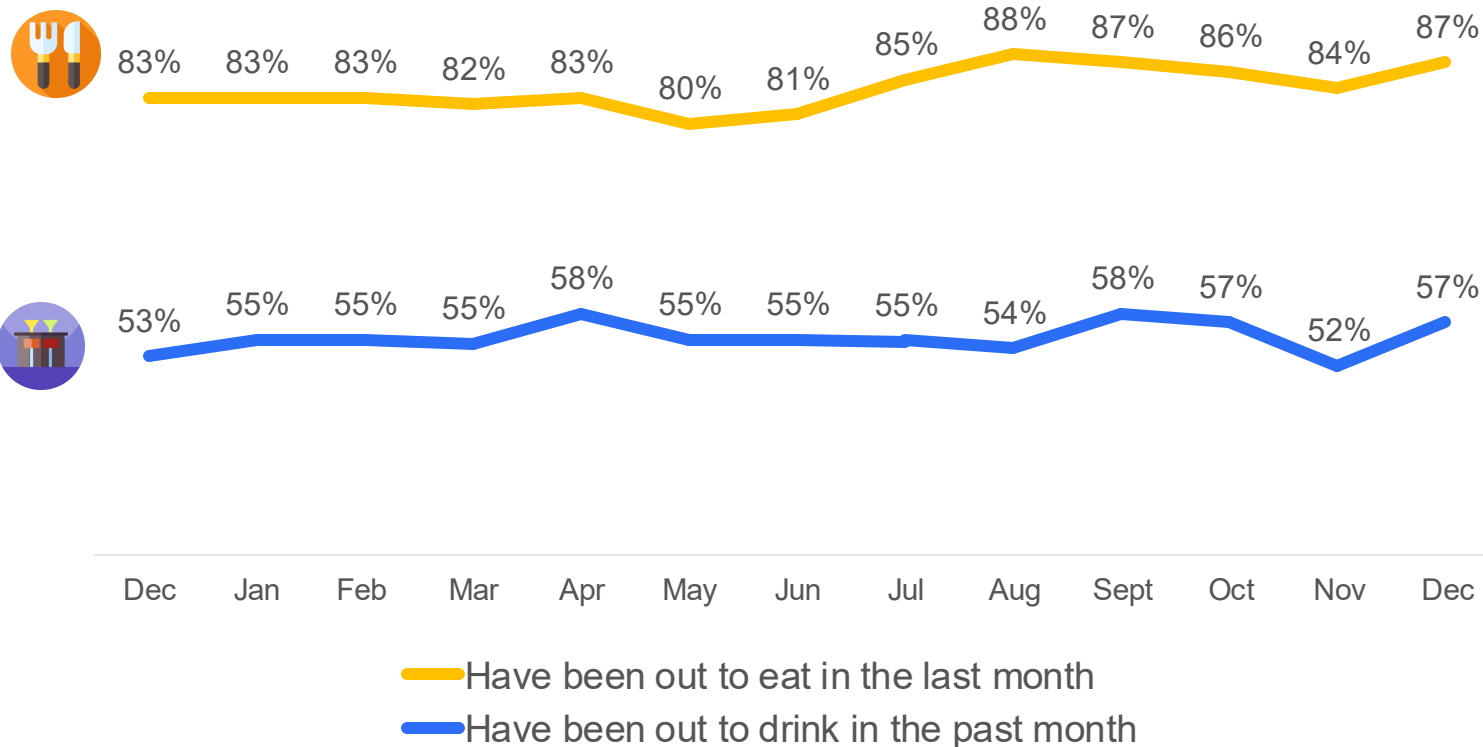
97% of consumers visited the On Trade this month

+1pp vs December last Year



FREQUENCY VISITING THE ON PREMISE OVER THESE LAST MONTHS

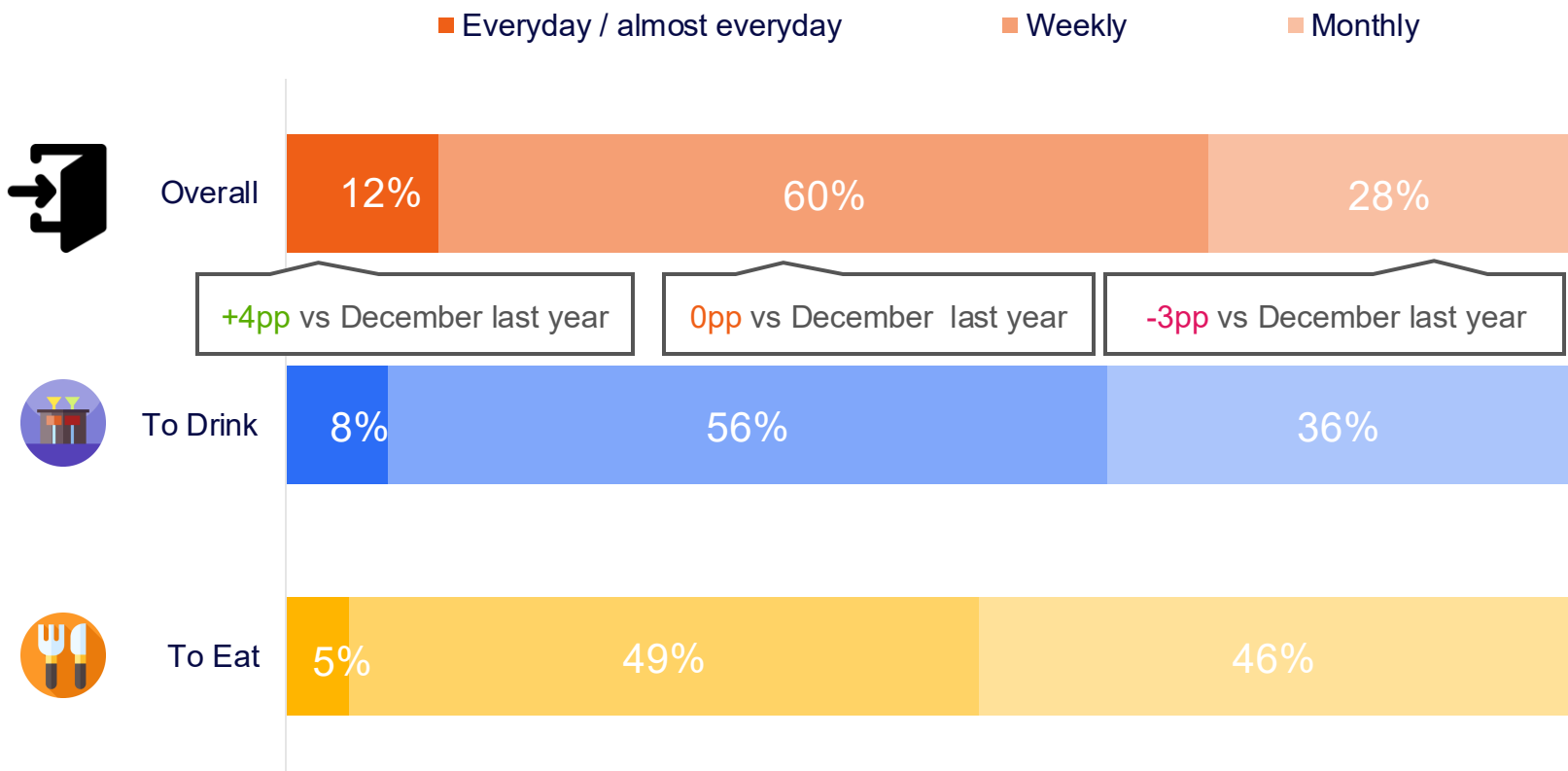
Yearly visitation rates to the On-Premise



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2024 - 2025 – SAMPLE: 750 - 752

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

Frequency visiting the On Premise in the past month



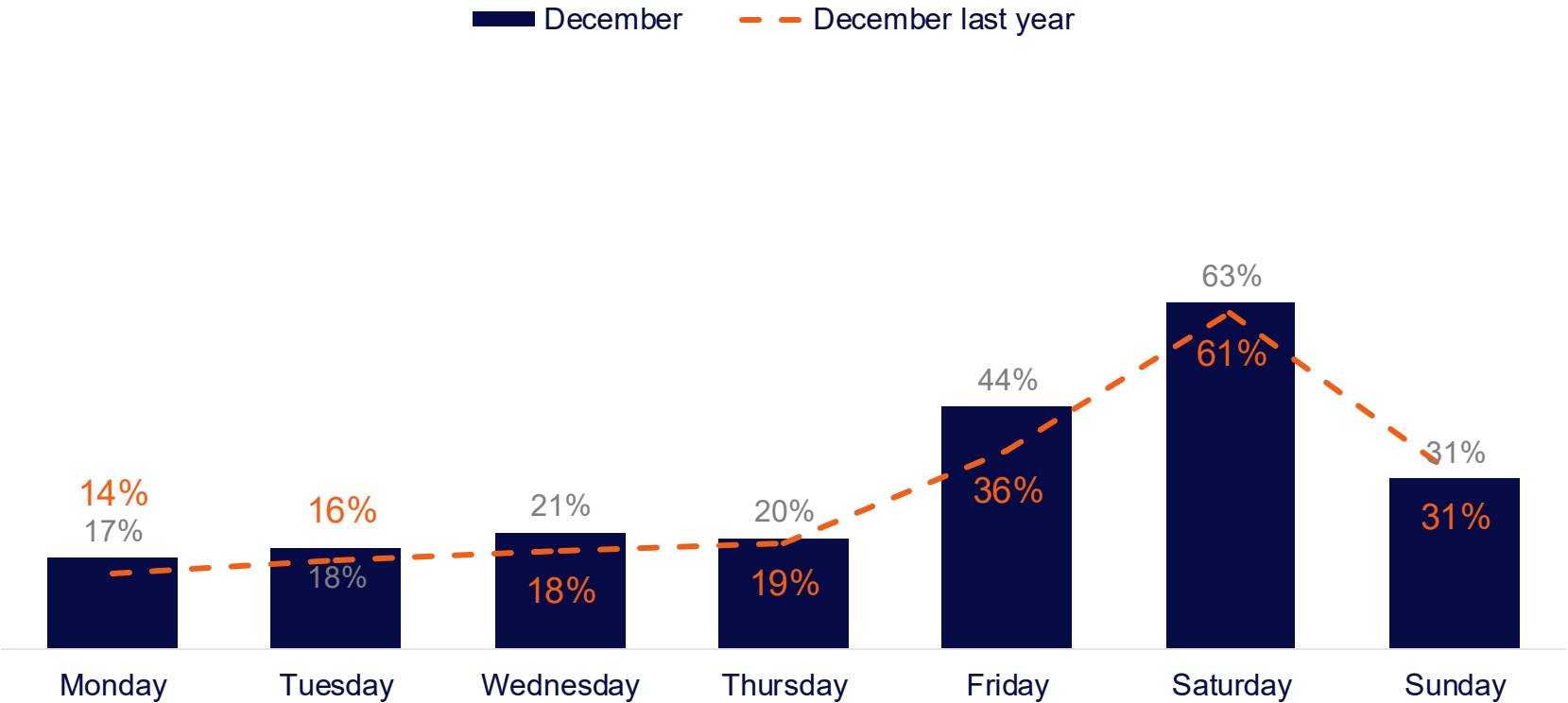
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2024, 2025 – SAMPLE: 425 - 730





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

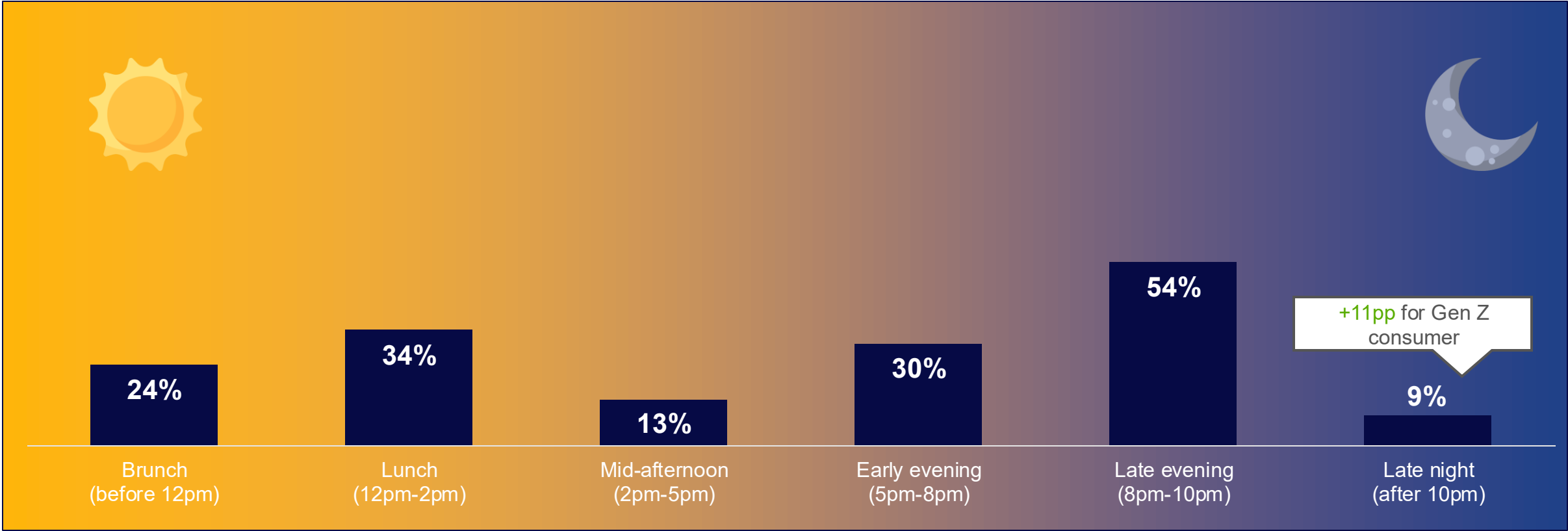
Day of the week visiting the On Premise



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2024, 2025 – SAMPLE: 723 - 730

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

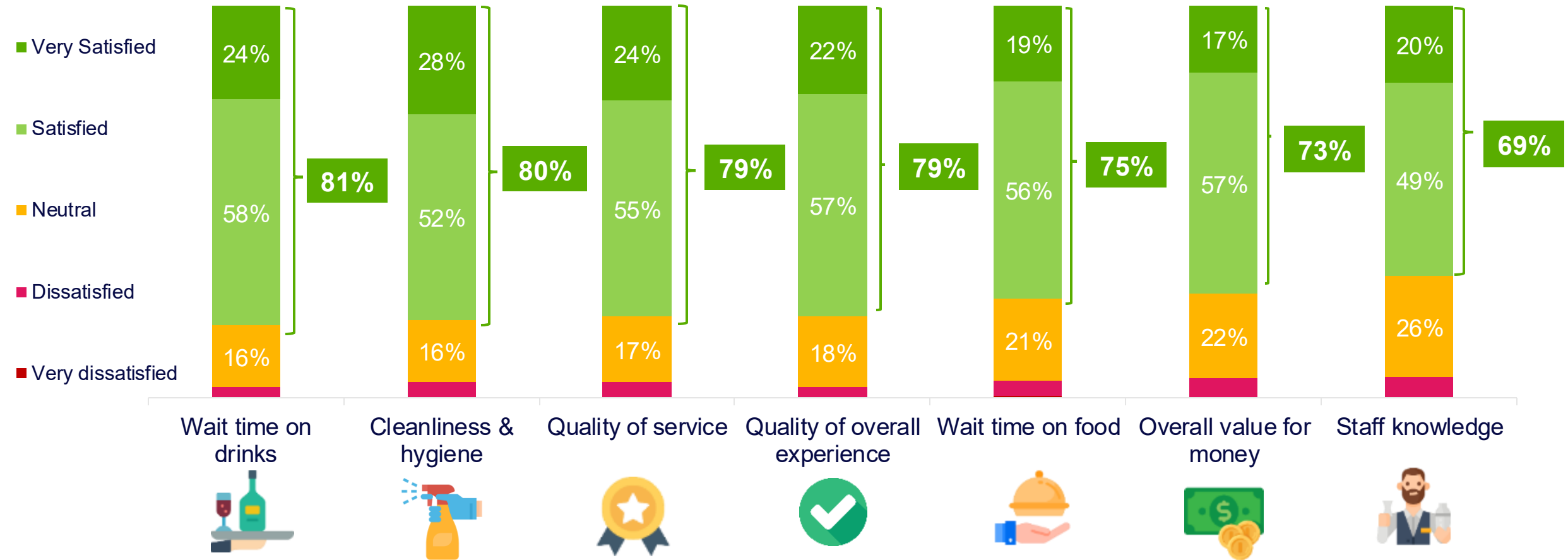
Time of day for visiting the On Premise



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2025 – SAMPLE: 123 - 730

SATISFACTION WITH MOST RECENT VISIT TO THE ON PREMISE

Proportion of consumers very satisfied/satisfied with...



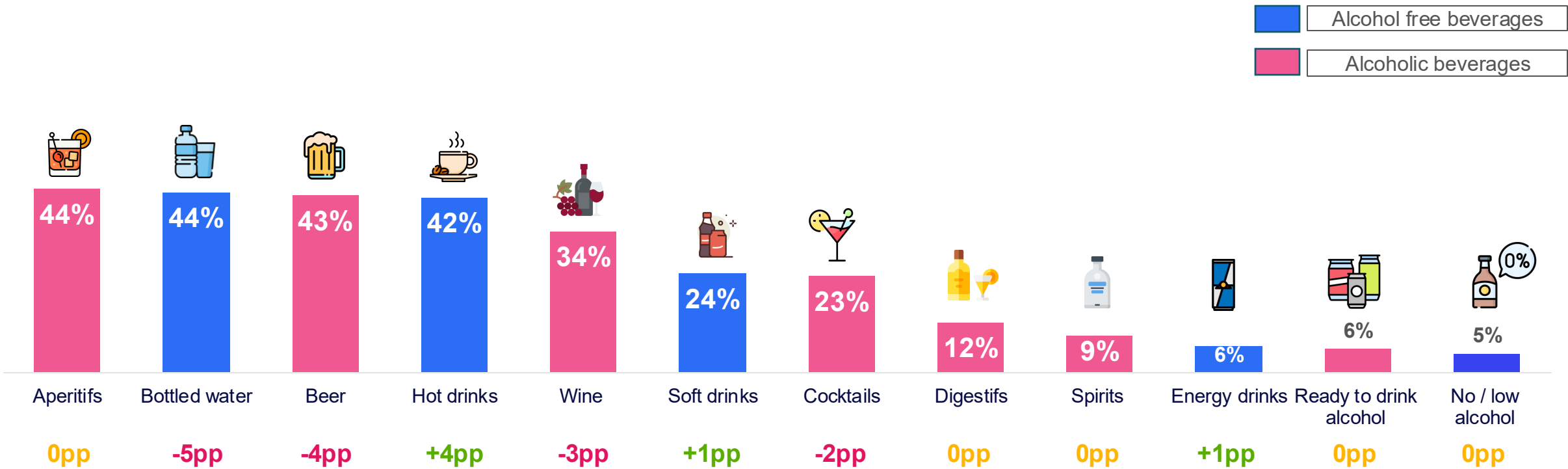
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2025 – SAMPLE: 650 - 744

Key Metrics: Categories Drunk



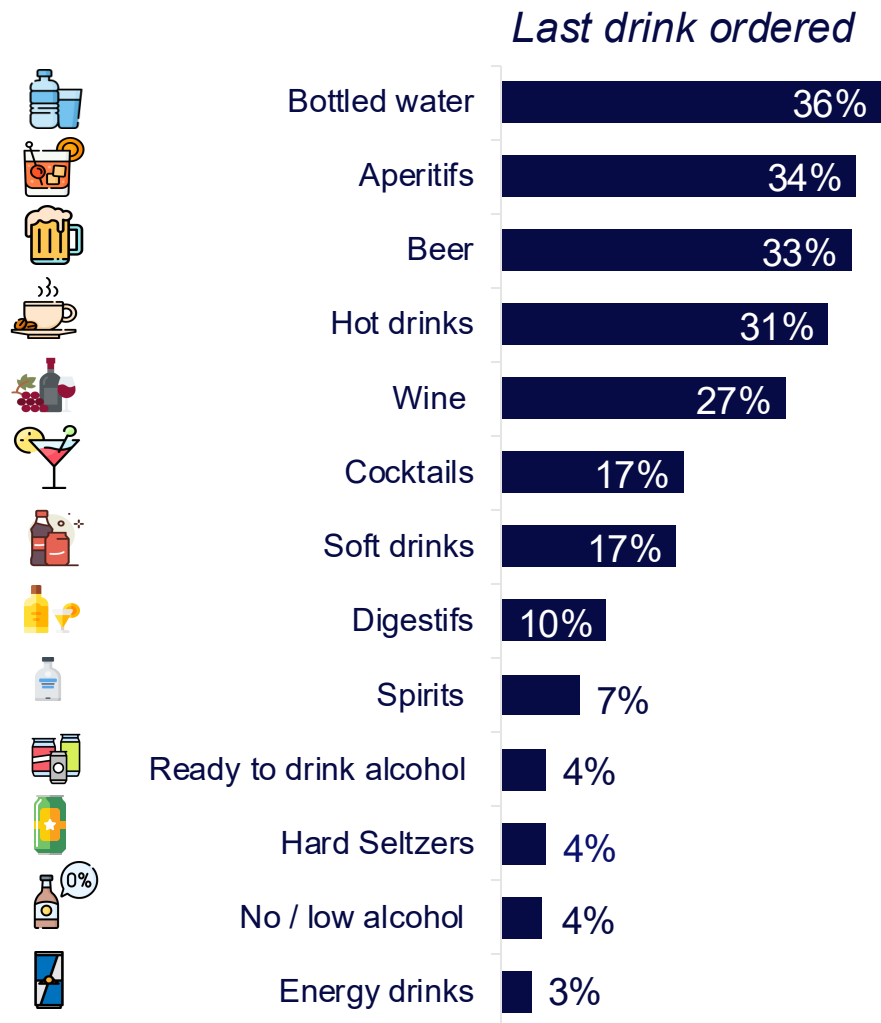
WHICH OF THE FOLLOWING DRINKS HAVE YOU DRANK IN BARS AND/OR RESTAURANTS IN THE PAST MONTH?

Most popular drink categories
Top 12 | Indexed vs. November



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT NOVEMBER & DECEMBER 2025 – SAMPLE: 717 - 730

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 DECEMBER 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**



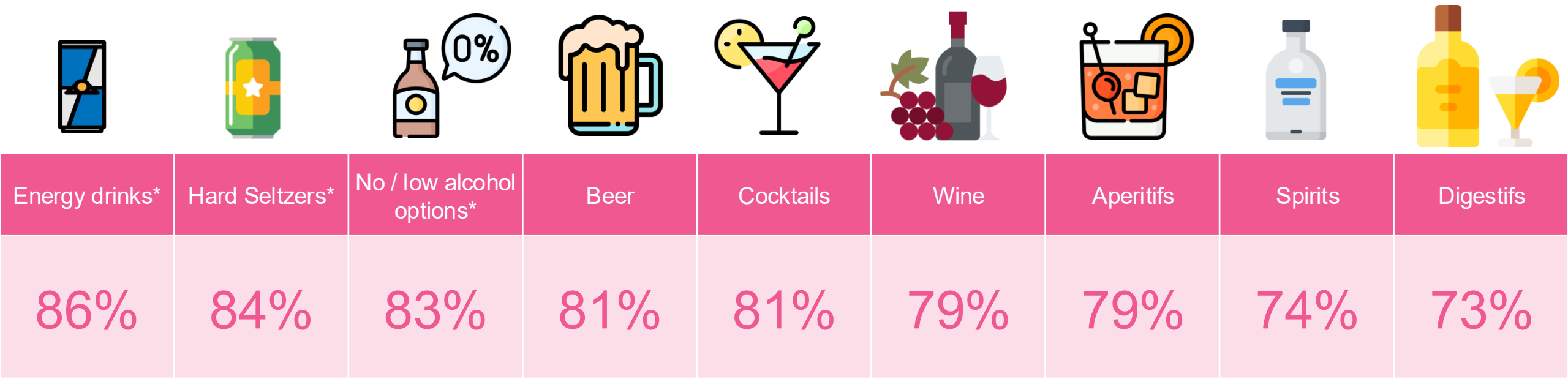
Beer	RTDs*	Digestifs	No / low alcohol options*	Wine	Hot drinks	Aperitifs	Cocktails	Soft drinks
86%	85%	84%	83%	82%	82%	81%	80%	77%

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2025 – SAMPLE: 30 - 250

*Sample size below 50

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

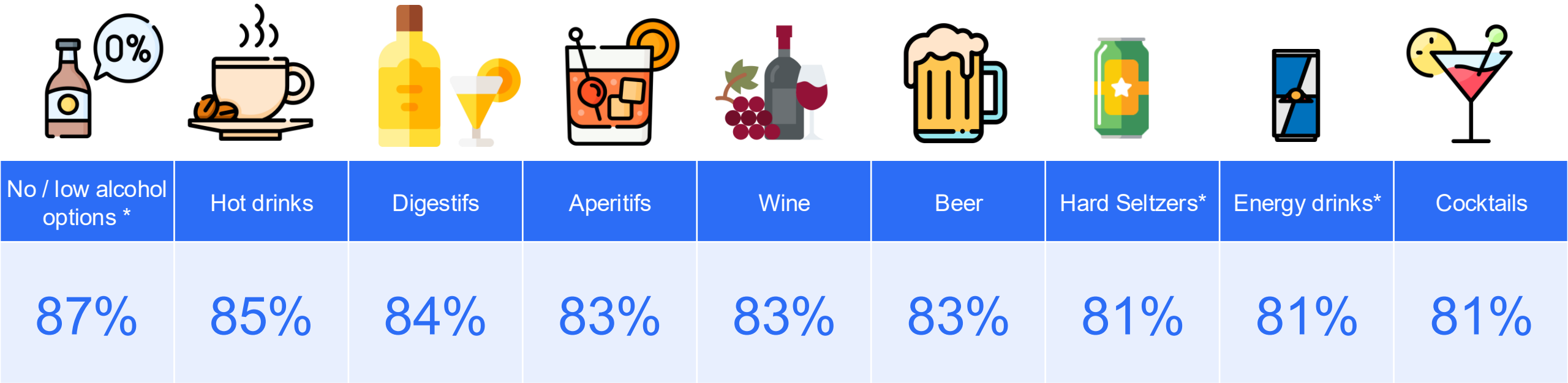
Shown to individual drink category consumer on latest visit
% very satisfied / satisfied with how exciting the drink was 🤩



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2025 – SAMPLE: 30 - 250

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** 



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2025 – SAMPLE: 30 - 250
*Sample size below 50

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

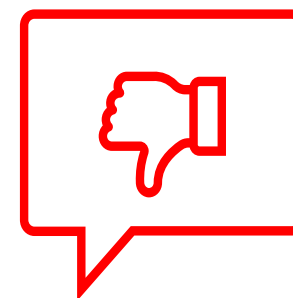
+19pp for Gen-Z consumers

+6pp for consumers from Rome
+8pp for consumers from Milan



24%

Yes



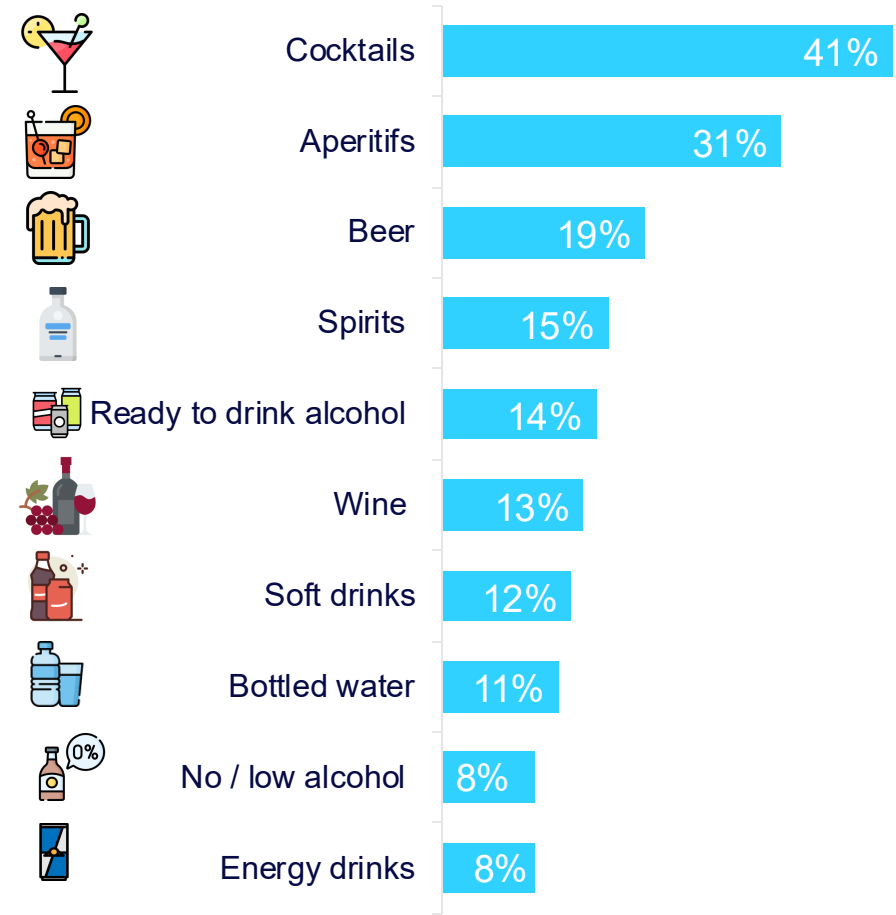
76%

No

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2025 – SAMPLE: 49 - 730

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

New drinks tried by those going out for food and drinks | Top 10



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2025 – SAMPLE: 177

Key Metrics: Next Month Prognosis





80%

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

40%

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



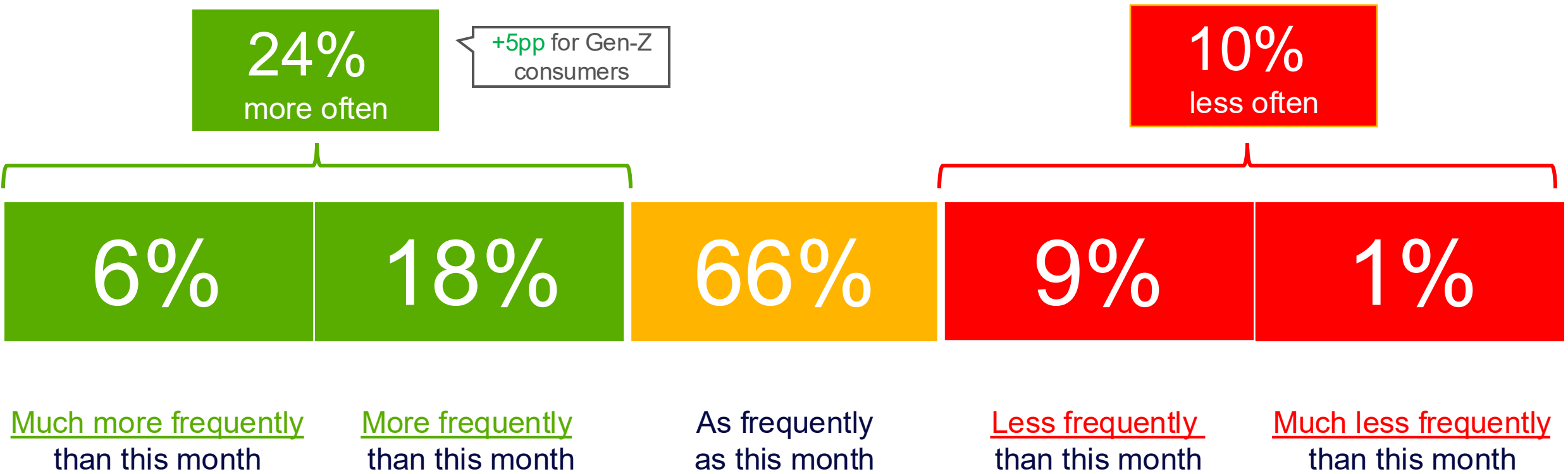
LOOKING FORWARD



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2025 – SAMPLE: 748

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 DECEMBER 2025 – SAMPLE: 123 - 718

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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



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



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



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



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



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 touch:



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