

US ON PREMISE IMPACT REPORT

October 24, 2025



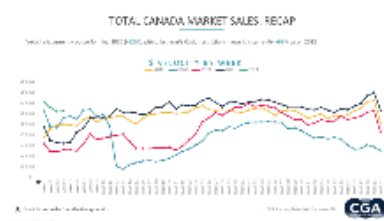
CGA by NIQ Impact Reports

CGA's On Premise Impact Reports help suppliers and manufactures across food and beverage keep a pulse on the industry by featuring current insights derived from a variety of our best-in-class data tools.

We began delivering these reports during the emergence of COVID-19 and now are providing this service year round.

4 PPT reports sent per month

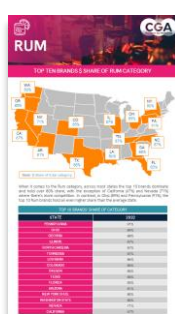
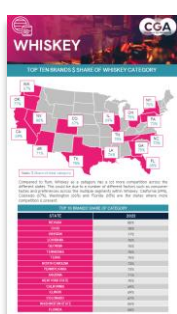
+2 Sales Impact Reports: provides sales velocity and ticket count trends drilling into specific states to measure bar and restaurant sales performance.



+1 Consumer Impact Report: gauging perception of On Premise visitors nationally on trends that are taking place in the channel. Subjected topics change with each month for fresh, relevant content.



+1 OPM+ Impact Report: The latest share data in the Total US and a deep dive into several new territories each month, detailing interesting shifts in category.



Get in touch with Drew Hummel – Director - BevAI Vertical
(Andrew.Hummel@nielseniq.com) to learn more about subscription access and wider capabilities.

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ON PREMISE SALES: TOTAL US

W/E October 18 2025

Value Velocity

Check Value

Ticket Count

\$95,500

\$54.70

1746

vs October 19 2024

+3%

-3%

+6%

CONSUMER RESEARCH: KEY STATES*

BEHAVIOR IN THE LAST MONTH TO SEPTEMBER 10th

In this wave, we deep dive into key consumer trends...

- Understanding levels of student loan repayments and how this affects On Premise behavior
- Exploring the influence of movies and TV shows on consumer drink brand and category choice

Consumers visitation in the past month



77%

have been out to **eat** in
bars/restaurants in the
past month

50%

have been out to **drink** in
bars/restaurants in the
past month



1 in 4

consumers and/or their partner/ spouse have
student loan repayments to make

35%



of consumers have tried a new
drink in the On Premise after
seeing **it in a movie or TV show**

Movie and TV show



61%

of consumers aged **21-34** are very
likely/ likely to **try a new brand** in a
category they usually drink after seeing
it in a movie/TV show

Last wave we collected insights into...

- On Premise Labor Day visitation
- How consumers behave towards the NFL and College Football
- The popularity of sports betting in the On Premise
- The appeal of US produced brands and exploring the importance of a products' country of origin

*Key states: California,
Florida, New York, Texas