



# Bars in 2035: Insights from the leaders

Trends, opportunities and the future  
of bars: A special report from CGA  
by NIQ and SIP by Pernod Ricard

## Welcome to **Bars in 2035**, an exclusive new report packed with insights into the future of the global bar and drinks market.

This is powered by a first-of-its-kind meeting of minds in a roundtable format, chaired by CGA by NIQ in association with SIP by Pernod Ricard. Ahead of the prestigious World's Best Bars Awards, we brought together some of the world's most celebrated, experienced and influential bar leaders at the Edition Hotel in Madrid for an in-depth conversation about the future of hospitality.

Our event was an unprecedented opportunity to explore the big trends in drinking-out and how hospitality might evolve between now and 2035, and the following pages capture its key themes, insights and learnings.

From drinks trends to social media to careers and more, our guests set out what matters most and where we're headed next. This report is a guide to the fast-changing landscape from the people who know the sector best—backed up by CGA by NIQ's best-in-class research sources and Pernod Ricard's market expertise. We hope you enjoy reading our report and welcome your views.

### **CGA by NIQ and SIP by Pernod Ricard**



#### **About SIP**

SIP (Share. Inspire. Pioneer.) is Pernod Ricard's Global Trade Advocacy platform addressing the Hospitality Community.

SIP was launched by Pernod Ricard in 2022 to support industry professionals, keeping them engaged and excited. The main objective of SIP is to stay close to the business, listen to the trade, and provide support where it is most needed.

By bringing the global bar communities closer, SIP is a program for everyone, including bartenders, chefs, bar managers, bar owners, waiters, Hotel F&B staff and those who occasionally want to be part of this fun and amazing industry.

#### **SIP stands for:**

**Share.** To improve their daily operations and business.

**Inspire.** For growth, enable the individuals to develop themselves and their careers.

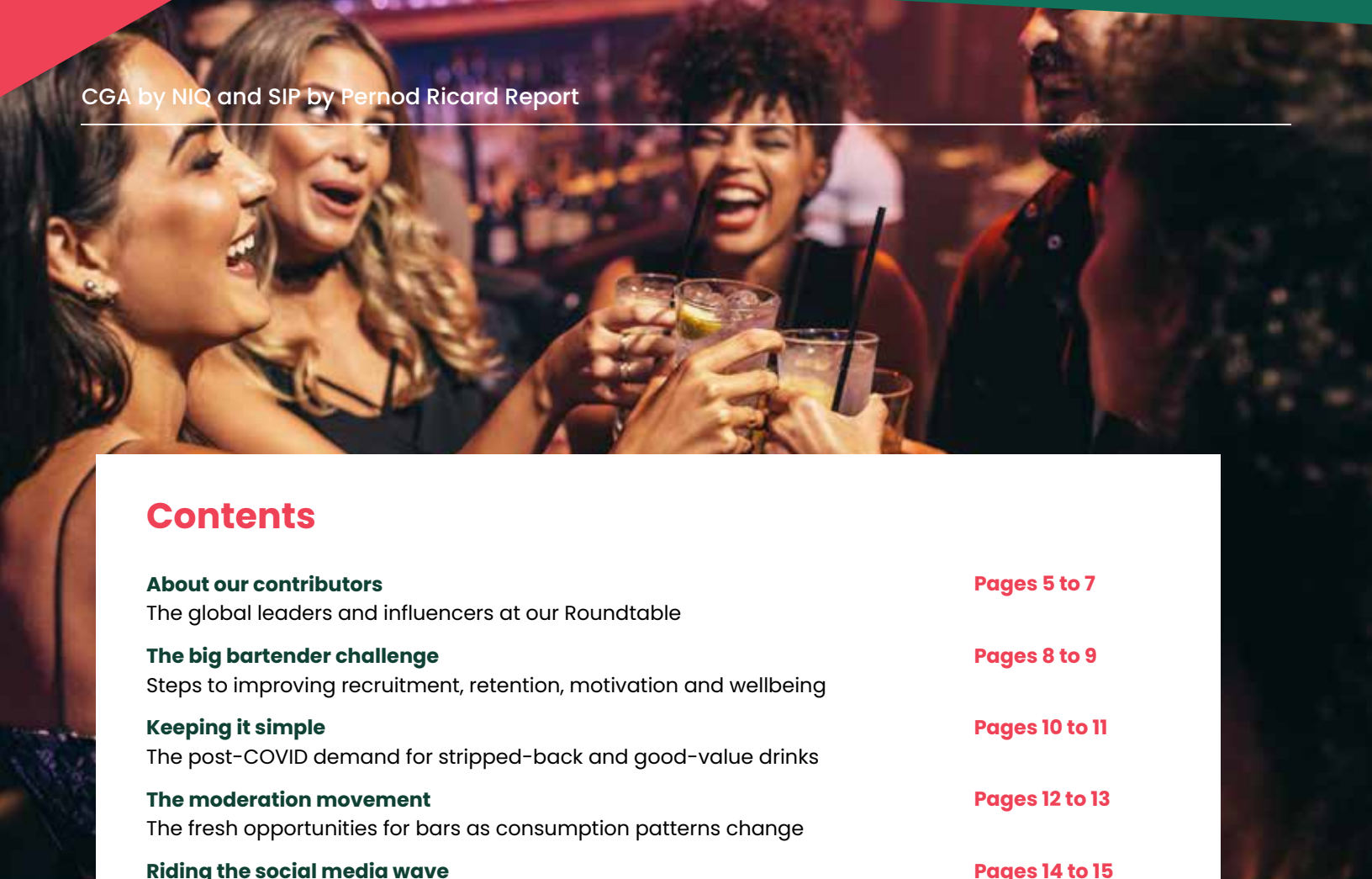
**Pioneer.** To empower the hospitality, connect professionals and move the hospitality industry forward sustainably and responsibly.

#### **About Pernod Ricard**

Pernod Ricard is a worldwide leader in the spirits industry, blending traditional craftsmanship, state-of-the-art brand-building, and global distribution technologies. Our prestigious portfolio of premium to luxury brands. Our mission is to ensure the long-term development of our brands with full respect for people and the environment while empowering our employees around the world to be ambassadors of our purposeful, inclusive and responsible culture of authentic conviviality.

#### **About CGA by NIQ:**

CGA by NIQ provides definitive On Premise consumer intelligence that reveals new pathways to growth for the world's most successful food and drink brands. With more than 30 years of best-in-class research, data, and analytics, CGA by NIQ provides the Full View(TM). Our mission is enable our global clients to understand competitive performance around the world with a commonality of data metrics and methodologies and providing local clients with the toolkit to make consequential, positive differences to brand strategy and growth.



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## About our contributors

### The global leaders and influencers at our roundtable

Our Madrid roundtable welcomed nine of the world's top bar professionals, sharing decades of experience in some of the most influential and innovative venues on the planet. None were paid or sponsored to take part, making the event an authentic and unfiltered view of the bar world. We are grateful for the contributions of these outstanding leaders.



**Priyanka Blah** is the founder of The Dram Attic, a lifestyle platform that was initially centred around spritzes and cocktails but has now expanded into highlighting premier bars, restaurants and hotels globally, alongside their outstanding bartenders. Priyanka is also South Asia Chair for The World's 50 Best Bars. Visit [www.thedramattic.com](http://www.thedramattic.com).



**Simone Caporale** won two consecutive titles in The World's 50 Best Bars, and became one of the industry's most recognisable faces through his Drinks Tube work with Jamie Oliver. He co-founded his own liqueurs range, Muyu; a non-profit industry platform, P(OUR); and a venue of his own called Sips in Barcelona. He has worked on campaigns with brands including Peroni, Bacardi and Havana Club and runs The Art Of Shaking (TAOS), a platform hosting video lessons from the world's best bartenders. Visit [www.theartofshaking.com](http://www.theartofshaking.com) and [www.pourdrink.org](http://www.pourdrink.org).



**Indra Kantono** is the co-founder of Jigger & Pony Group, which owns and operates seven venues in Singapore including flagship bar Jigger & Pony, mid-century modern Japan-inspired bar Live Twice, and Italian restaurant bar Caffe Fernet. One of the most recognisable faces of cocktail culture in Asia, Indra has been on the Bar World's 100 Most Influential Figures list since 2020 and was named amongst the Top 10 Best International Bar Mentors at the 2024 Spirited Awards. In 2024, Jigger & Pony Group expanded internationally with the opening of cocktail bar Cosmo Pony in Jakarta. Visit [www.jiggerandpony.com](http://www.jiggerandpony.com).



**Alex Kratena** was formerly Head Bartender at Artisan in London, which won multiple awards including the World's Best Bar for four consecutive years. His individual awards include Best International Bartender at the Spirited Awards, and he was named one of the 40 most influential individuals in the global bar industry on The Creators List. Alex is also a co-founder of Muyu liqueurs and a London bar called Tayēr + Elementary that serves ready-to-drink cocktails on tap. Visit [www.muyu-liqueurs.com](http://www.muyu-liqueurs.com) and [www.tayer-elementary.com](http://www.tayer-elementary.com).



**Francois Monti** has had a huge impact on the Spanish and global bar scene. His Bitterness agency consults with hotels, bars and restaurants and helps implement events for spirits, aperitif and wine brands. In 2019, Francois was named one of the 100 most influential people in the global bar industry. He is the author of four books, helps brands create education programmes, and runs seminars and masterclasses for public and private institutions. Visit [www.instagram.com/francoismonti](https://www.instagram.com/francoismonti).



**Sara Moudoulaud** is a renowned mixologist celebrated for her innovative approach to cocktail creation. She gained international acclaim after winning the Bacardi Legacy competition in 2020. Currently she leads the team at Bar Nouveau in Paris, a venue that ranked 39th in the World's 50 Best Bars list. Her expertise and creativity have positioned her as one of the most influential figures in modern mixology. Visit [www.instagram.com/sara.moudoulaud](https://www.instagram.com/sara.moudoulaud).



**Danil Nevsky** is founder of Indie Bartender and has over 15 years of experience in the industry. He is best known globally for completing the Vagabond Project, where he worked full-time for free in 11 different bars across 11 different countries. He is also the founder of the Daiquiri Kombat Klub (DKK), a competition for bartenders to make daiquiris in the fastest time, which has also turned into a great way to educate young bartenders on ways to use rum. Visit [www.instagram.com/cocktailman](https://www.instagram.com/cocktailman).



**Remy Savage** has earned the titles of World's Most Imaginative Bartender, Best European Mixologist and Best International Bartender of the Year. He has helped six bars reach the global top 50, including The Little Red Door in Paris. Remy is a bartender and Creative Director of Le Sydnicat and La Commune bars and has worked to demystify the cocktail experience, including through a menu of 22 cocktails with only two ingredients, which subsequently won Best Drinks List at the Class Awards. Visit [www.drinkmoreart.co.uk](https://www.drinkmoreart.co.uk).



**Anna Sebastian** Hospitality was founded by Anna Sebastian, a seasoned professional with over 15 years of experience in luxury members' clubs and Forbes 5-star hotels, including The Savoy and The Langham. She was responsible for bringing bars into the World's Top 50 lists and winning several accolades for best menus, International team and bar manager of the year.

Anna also writes for Class Magazine, founded Celebrate Her—a platform dedicated to supporting women in the drinks industry—and serves as a judge for numerous competitions and awards. She is on the Business Advisory Committee for Tales of the Cocktail and is a presenter for the Class Bar Magazine Awards in the UK each year. Visit [www.instagram.com/annasebastian3](https://www.instagram.com/annasebastian3).



**Dylan Battick** (Roundtable Co-chair) is Consumer Research Manager at CGA by NIQ. Dylan has built a career as the research team's specialist for hospitality professional insights, and has surveyed and interviewed thousands of industry professionals—from local bartenders to globally recognized CEOs. Most notably, Dylan led the creation of the highly successful 2024 Global Bartender Report, helping brands optimize their engagement and support for bartenders.



**Charlie Mitchell** (Roundtable Co-chair) is Head of Insights and Consumer Research at CGA by NIQ. He has over a decade of experience in On Premise consumer research and specialises in insights to inform winning On Premise strategies. Charlie is responsible for the development of CGA's global suite of consumer research and insight and is an expert in consultative recommendations about how brands can influence consumer behaviour.

## The big bartender challenge

### Steps to improving recruitment, retention, motivation and wellbeing

If the bar sector is to thrive over the next decade, more will have to be done to encourage and support the people who work there.

That was the view of leaders at the Roundtable, who are keen for others to follow in their footsteps to long and rewarding careers in the industry. The need is particularly strong among younger adults, who make up the vast majority of bar staff but who are too often lost to other sectors as they get older.

This latest generation of bar workers wants more. They are less willing to work long hours in poor conditions, and more likely to demand support, decent pay and opportunities to develop their careers. This reflects broader societal changes, which have seen employees become more vocal about the need for fairness and equity in the workplace—especially since COVID, when lockdowns led many people to re-evaluate their jobs and work-life balance. It's had a ripple effect that has impacted hospitality more than most sectors.

#### The view from the bar

The 2024 Global Bartender Report from CGA by NIQ reinforces this new interest in fairness and wellbeing. Nearly half (46%) of staff told the survey they were currently facing challenges in their work-life balance, while an alarming 30% said they were facing issues with their mental health and wellbeing. Just 39% felt they knew how they could progress in their career. Significant numbers also mentioned problems around insufficient staff in their venue (34%), training new staff (32%) and a lack of time to socialise (26%).

These issues can make it hard for bars to attract and keep talented staff. They are particularly apparent in regions with expectations of high workloads and limited resources struggle to create sustainable environments for bartenders.

#### Meeting the challenge

Much of this sounds negative, but bartenders also report plenty of positives, and there is a genuine passion for the profession. Nearly three quarters (72%) of survey respondents want to stay in the bar industry for the foreseeable future, and businesses that can meet their needs can avoid the talent drain and earn major competitive advantages in the years ahead. We are likely to see more employers responding to demands for fairness, and shorter shifts or four-day weeks may become the norm. Change won't be easy, but it will help bars attract and retain talented and motivated bartenders—which in turn will give guests better service.

Bars' partners can help by providing some of the training, professional development and perks that these workers want. By aligning with the values of good working conditions and wellbeing, brands can enhance their reputation and appeal to a more conscientious workforce. Training, mentoring and community-building events are just some of the options open to suppliers. If by 2030-2035 brands and operators can cater to these needs, we can expect the industry norms to be far improved from current circumstances. This will be the footprint of all dedicated investment to overcoming this challenge, particularly with staffing issues.

Governments are another important source of support. An overdue recognition of hospitality's value can increase its appeal as a workplace, while legislation on workers' rights may lead all employers to improve working conditions. Steps like this could have a positive impact on staff satisfaction and commercial growth.

**Top takeaway:** Bartenders are clear that they need more support—and businesses that provide it can secure big competitive advantages in the years ahead.



“Despite being at the heart and buzz of hospitality venues, working in the sector can often be a surprisingly lonely and isolating experience for staff. Long, late hours can detach bartenders from non-industry peers and leave workers lacking a sense of socialisation outside of the sector. However, there is growing investment from brands and the industry as a whole to build healthy communities through the likes of engagement programs to combat any potential loneliness. These initiatives are making a meaningful impact by fostering connection and creating a sense of belonging. That said, there remains work to do and, looking ahead, I believe that there needs to be a paradigm shift – one where bartending not only provides a livelihood, but is a sought-after career path known for its vibrant and supportive community”. **Charlie Mitchell**



“Positive workplace culture is the key to attracting talent, retaining good people and mental wellbeing.” **Indra Kantono**

“There’s a generational difference with the new cohort of bartenders. They’re less willing to grind with no support like my generation was. They expect help, support and training, and they’re not afraid to ask for it.” **Simone Caporale**

“The next generation of bartenders expect more from their bosses. I think it’s quite positive that they know their rights and have high expectations—there’s an entitlement there, but that’s awesome, because it’s been a long time coming. It’s forcing their employers to be better—and in five to ten years these people will be bosses themselves, with different views of how to do things.” **Remy Savage**

“We’re going to see some really positive change in areas like inclusivity, gender diversity and work-life balance in the near future.” **Sara Moudoulaud**

“Hospitality is having to move towards a more holistic way of working, because all the people I’m hiring want more flexibility in their role.” **Anna Sebastian**

“Limited time makes it difficult for our bartenders to expand their knowledge... I think that’s the greatest challenge for us right now.” **Priyanka Bla**



72%

Of bartenders want to stay in the bar industry for the foreseeable future



46%

Of bartenders are currently encountering challenges in their work-life balance



30%

Of team members say they face challenges in mental health and wellbeing



## Keeping it simple

### The renewed demand for stripped-back and good-value drinks

After a wave of interest in complex cocktails in recent years, some bartenders have noticed a return to simpler drinks. Hyper-premium, multi-step serves are still popular in some bars, but many consumers are now seeking more straightforward options.

#### The COVID effect

This trend has accelerated since the COVID-19 pandemic, which prompted many consumers to reflect on their preferences and priorities.

Lockdowns led them to recreate at home the cocktails they were missing during bar closures—and in many cases these were simpler serves with fewer frills. This period gave them a fresh appreciation of traditional and straightforward classics, which has continued since the sector reopened.

The desire for simplicity also reflects a broader demand for consistency and reliability. With bar guests returning to simpler choices, operators have been responding with well-executed and familiar combinations that still deliver high quality. Drinks become classics for a reason, and they appeal to people who want to be sure they will enjoy what they are served.

This trend is also extending beyond the bar to guest environments. Many operators have chosen to simplify their bars, removing extraneous detail while maintaining the same high quality of comfort and ambience. Consumers now appreciate that they can still have luxury experiences without fancy accoutrements.

#### The role of value

Demand for simpler serves is also being powered by value. While the luxury end of the drinks market continues to flourish, the lingering effects of the cost of living crisis mean some consumers are keeping a close eye on their spending. They still want to go out, but CGA by NIQ's research suggests they are drinking fewer drinks when they do so.

This has slowed the premiumisation trend somewhat, but it doesn't mean that consumers are willing to sacrifice quality. Value for money doesn't necessarily mean cheap—just worth the price that is being paid. The result is that consumers are more demanding than ever and seeking high standards at fair prices—and if they don't get them, they have plenty of other bars and drinks categories to choose from. CGA by NIQ's REACH research sounds a warning bell on this, with **25%** of global consumers planning to drink fewer cocktails in the year ahead.

**Top takeaway:** A renewed and stripped-back appreciation of quality, alongside COVID lockdowns and economic pressures have pushed people back towards the familiarity of simple, often minimalistic, well-made and good value cocktails.



"I'm seeing a lot of guests coming in and wanting something they know will be good. It's got a little bit forgotten for a while, but I'm hearing more and more interest in consistency and affordable luxury." **Anna Sebastian**

"Consumers are starting to look for more simplistic bars, because they realise that cocktails don't always have to be fancy." **Sara Moudoulaud**

"Premiumisation and refinement have been big drivers for the longest time. But just like fashion, many people now want to take a step back and go back to the basics... There's a longing for simplicity." **Indra Kantono**



## The moderation movement

### The fresh opportunities for bars as consumption patterns change

CGA by NIQ’s latest research flags a trend that is going to present bars with both opportunities and challenges in the decade ahead: moderation.

In most major markets around the world we have seen adjustments to drinks choices as people focus more closely on their health and spending. CGA’s REACH research shows **32%** of global consumers say they are drinking or planning to drink alcohol less frequently than they were a year ago. Some of them are acting this way because of a fresh focus on their health during COVID. But it is also a generational thing, with younger adults making wiser decisions while deciding on what to drink than the older ones.

#### Capitalising on moderation

However, this doesn’t mean they are abandoning stronger serves. Of those who plan to reduce their intake, only 6% plan to avoid it. Far more plan to either buy fewer drinks (**23%**) or save stronger serves for special occasions (**30%**). Worldwide, exactly half (**50%**) of people moderating their consumption still visit the On Premise weekly, and moderators (excluding teetotallers) make up a quarter (**25%**) of all visits.

This emphasises the point that moderation is as much of an opportunity as a threat. Beneficiaries are likely to include lighter alternatives, and while these are still a relatively small part of the drinks landscape, there are signs that interest could rapidly grow in the years to come.

Moderating consumers can be a big growth market—but only if bars and brands can present them with the high-quality options they demand. Their drinks need to fit seamlessly into social and special occasions, delivering the same standards of ingredients, serve, garnishes and glassware that consumers get from traditional options.

#### Experience is everything

Moderation may also be a side-effect of consumers’ desire to spend more of their time and money on other aspects of their experiences when they go out. When younger adults, in particular, visit bars, they are increasingly seeking not just a good drink but an all-round experience that creates memories and provides them with social currency. This has raised the importance of things like serve and atmosphere, and put a new focus on activities that are available in venues, like masterclasses, activations, games and interactive elements.

Whatever the reasons for moderation, bars and suppliers will need to stay on top of this trend and adjust cocktail offerings to suit new needs. It’s a particularly important consideration when targeting younger adults, who are emerging into bars searching for experiences, and expecting a wide range of cocktail options for moments when they are moderating or substituting. This new generation has many drinks and socialising options to enjoy, so bars will have to continue working hard to sustain their interest.

**Top takeaway:** Younger consumers are broadening their social experiences and have higher expectations than ever—including at times when they choose to moderate and seek lighter options.



**30%**

Of consumers have moved towards lighter serves because they want to keep stronger ones for special occasions



**34%**

Of bartenders think alcohol-free spirits in cocktails will be a big trend in the year ahead



“No alcohol and lighter drinks alternative are a good option on bars now.”

**Remy Savage**

“It’s quite interesting and good to think about cocktails not trending anymore, and becoming just another option. It’s going to be exciting to see what bars and brands do to respond to that.”

**Francois Monti**

“No and low alcohol drinks aren’t just sold to teetotallers. Once, they were designed for people who don’t drink at all, but growth is happening because brands have recognised that there’s a far bigger appeal.” **Indra Kantono**



## Riding the social media wave

### The new role of bars and influences in brand engagement

Social media has transformed the way bars and drinks brands influence both consumers and one another. Platforms like TikTok and Instagram are now core to people's behaviour in bars, opening up opportunities for new types of engagement. They let guests shape how venues are perceived and experienced in ways that couldn't have been imagined as recently as a decade ago.

#### The social consumer

CGA's global REACH research shows the huge value of positive social media exposure. Nearly three quarters (72%) of consumers say they have visited a specific bar or similar venue after seeing it on social media or online. Two thirds (66%) have purchased a specific drink or food item after spotting it there.

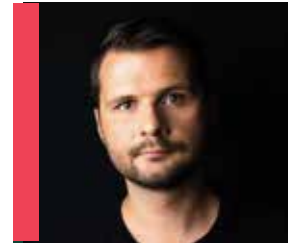
Consumers also want their drinks to deliver the social media currency they crave. Nearly two in five (38%) agree that documenting their eating and drinking out on social media is very important to them, and a similar number (39%) base their choice of drink on what will look good there.

#### The bridge from brand to bar

Social media's influence over guests' decision-making is giving bar staff a powerful new role. Over the next few years, we can expect to see the emergence of a new generation of bartender influencers who produce content that directly influences purchases. Previously, bar staff have tended to post in a B2B environment, influencing fellow bartenders rather than guests—but now they're creating photos and videos that influence drinkers as well. This new breed of influencers provides suppliers with a huge opportunity to boost their brands and connect with consumers in a powerful and authentic way.

Bartenders know the value of social media and are looking to suppliers for support. The 2024 Global Bartender Report from CGA by NIQ found that 42% of staff think brands with a strong social media presence are best placed to thrive—making it an even more important factor than things like activations, heritage and even quality. They know that visuals are key to success, and 35% expected to see bold and vibrant cocktails with a strong social media presence do well in the year ahead.

**Top takeaway:** Social media will be a key brand battleground in the years ahead, and bartenders will be at the heart of a new age of engagement.



"Bartenders have a great relationship with consumers, and brands want to be a part of it. Social media has really opened that up. There are people on TikTok and Instagram who none of us have heard of, but they influence more consumer behaviour than any of us." *Danil Nevsky*

"Somebody made a TikTok video of one of our Margaritas—and for a year-and-a-half afterwards, we had guests coming to the venue for that same drink." *Alex Kratena*

"Influencers do so well because they are relatable to bartenders and consumers. We need to find that sweet spot of understanding what other people want, and not just what we want. That hybrid space is really, really key." *Anna Sebastian*



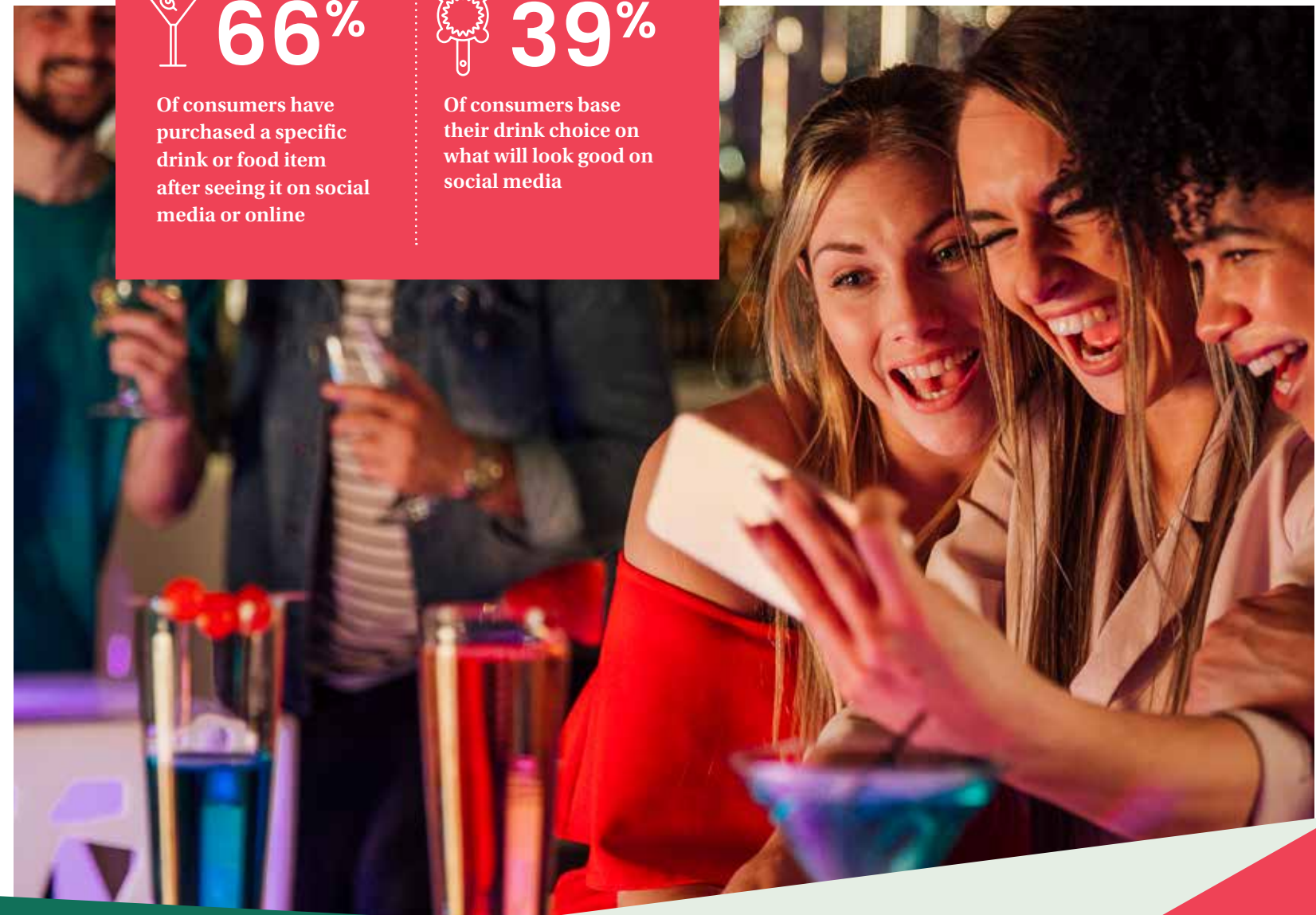
66%

Of consumers have purchased a specific drink or food item after seeing it on social media or online



39%

Of consumers base their drink choice on what will look good on social media







## The great digital disconnect

### Why social media overload is turning some people off digital experiences and on to real-world connections

The role of social media is only going to grow. Instagram has around 2 billion users, having doubled in popularity in five years, while TikTok is catching up fast. These platforms are overshadowing traditional advertising channels, and bartender influencers with large followings will become ever more important.

#### The backlash begins

But there's a growing backlash against social media too. We are starting to see venues, brands and consumers alike push back against the 'always-on' culture, and seeking to create refuges from the online world. Media stories have highlighted the decision of some bars to ban smartphones and photography to protect people's privacy and allow them to properly relax.

For their part, some consumers are closing social media accounts or scaling back their feeds so they can return to more mindful experiences in the real world. People who might have been active on several platforms are now cutting down to one or two.

#### Bars in the social switch-off

Momentum for this disconnection is going to build, and brands and venues that accommodate it can flourish. As one Roundtable participant put it: "There is going to be a desperate need to disconnect at some point... to have an experience that is left for discovery during the visit [to a bar]." Another added: "There will be a need for bars... where consumers can just enjoy the night without the pressure to take photos."

These two big trends—for online currency and offline interactions—are opposing but complementary, and there will be heavy demand for both in the decade ahead. Consumers' use of social media is going to polarize: between those who will to be even more influenced by social media and want to be influencers themselves; and those who wish to disconnect from it completely. For brands and suppliers, balancing the needs of these different types of venues and demographics will be vital.

**Top takeaway:** As a backlash against digital culture deepens, bars and brands can help consumers establish more meaningful connections.



"Disconnecting in the On Premise will get more and more important because we have such hectic lives now. We don't want to succumb to that pressure 24/7."  
**Priyanka Blah**

"I think there is going to be a desperate need to disconnect [from social media] at some point. It will be seen as quite cool in the future to have an experience that is left for discovery during the visit."  
**Remy Savage**

"Offline bars like The Spy Bar in London aren't new, but they are growing. In the future there will be a need for bars like this, where consumers can just enjoy the night without the pressure to take photos."  
**Anna Sebastian**

## Thinking global but living local

### How 'glocalisation' is changing hospitality and how businesses can adapt

Travel, social media and education mean bar and cocktail consumers are more global in their outlook than ever before. They have democratised drinking-out, bringing it within the reach of millions of new guests.

The same trend applies to bartenders. The Roundtable in Madrid and the World's Best Bars list showed how the bar scene is truly international as well as local and national, and the sharing of knowledge, innovation and ingredients has raised the quality of both drinks and venues. It has also benefited suppliers, whose brands can quickly cross boundaries and establish new markets. For consumers, the end-result is a best-ever quality and diversity of choice.

#### Keeping it local

After the interruption of COVID-19 and lockdowns, international travel has bounced back, and more globalisation can be expected in the next decade. But this trend has downsides too. While many consumers and operators have embraced international drinks brands, others think their availability can make for a homogenised hospitality experience.

CGA by NIQ's REACH research shows both trends at play in the On Premise. Interest in imported spirits and beer brands has grown, but so too has an appreciation of local drinks—especially since COVID. Worldwide, a quarter (24%) of consumers say it is now more important to them than it was a year ago that their drink is from their own country.

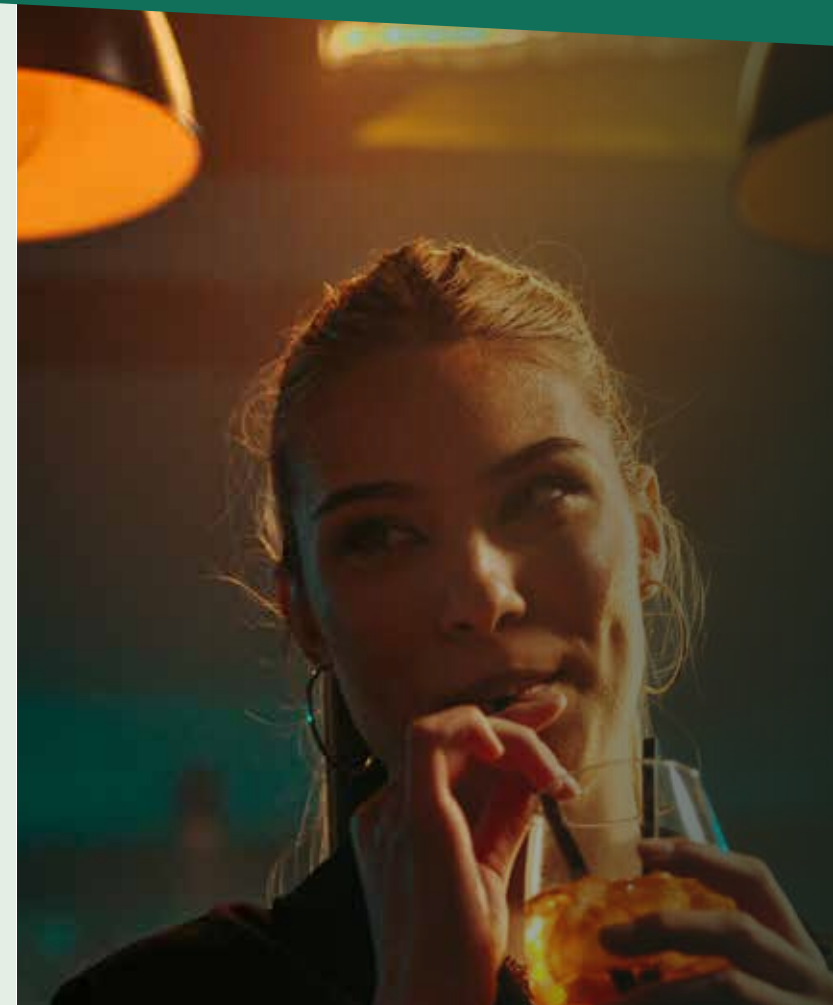
Two thirds (67%) typically drink local brands out-of-home—double the 33% who typically choose global ones. Bartenders echo these views, and more than a third (36%) told The 2024 Global Bartender Report that local brands were best placed to thrive in the year ahead.

#### Sustainability matters

Interest in local drinks is powered by factors like national pride, brand heritage and trust. It is also connected to another top consideration of our time: sustainability. As the industry becomes more homogenized, the practice of cultural sustainability will grow increasingly important. Consumers will seek out venues that embody cultural sustainability, viewing them as the most authentic places to visit. Remy Savage highlights this sentiment "We're heading towards cultural as well as environmental sustainability. There will be an increased emphasis on bars and restaurants that understand they are part of the cultural landscape of a place."

Local identity, cultural relevance and low environmental impact will all become more prominent in the years ahead. For suppliers and operators, finding the balance between the global and the local is going to be crucial. Of course, the pace and impact of industrialisation varies enormously from region to region, and it's heavily influenced by local economic and social conditions, so approaches need to be adapted to markets. Brands that can deliver reliable worldwide consistency while localising strategies will achieve the best engagement in a competitive market.

**Top takeaway:** In a world that is both globalised and localised, consumers are seeking a balance between familiar, tried-and-trusted big brands and smaller offerings that reflect their communities and local nuances.



"In the cocktail world, even though we are all from different countries, we are part of a global bar scene." *Francois Monti*

"Cocktail culture is more accessible than ever before. Consumers and cities can rapidly learn about new cocktails." *Indra Kantono*

"We're industrializing fast and aggressively... Social media and globalisation mean trends are rapidly shared around the world, and it's just a matter of which ones will find a grip in their new markets." *Danil Nevsky*

"We're heading towards cultural as well as environmental sustainability. There will be an increased emphasis on bars and restaurants that understand they are part of the cultural landscape of a place." *Remy Savage*

"We're going to see more reliance on local resources and ingredients to help preserve a sense of place." *Priyanka Blah*

"For us it's about adapting to each market while maintaining a sense of cultural responsibility and authenticity." *Indra Kantono*



Of consumers say it is more important to them that a drink is from their own country than it was a year ago



Of consumers typically drink local brands out-of-home



Of bartenders think local brands are best placed to thrive in the year ahead (ranking 4th of 18 characteristics)



Of consumers try local drinks when on holiday

## Alternative mood-boosters

### What nootropics and other options mean for bars, spirits and cocktails

It's not just moderation that is leading bars and drinks brands to rethink their portfolios and promotional activity. Consumers have a growing range of alternative forms of relaxation that are set to influence their behaviour and spend in the years ahead.

#### A new wave of options

These alternatives include nootropic beverage brands like Trip. Sales of this grew by more than **500%** in 2023 and it has continued to grow in visibility since, with a sharp increase in penetration in Off Premise channels, according to NielsenIQ Homescan. Its combination of CBD infusion and nature-based ingredients like ginseng, chamomile and lemon balm appeals to mindful consumers who are focused on their wellbeing and are prepared to consider stepping away from alcohol at least some of the time.

Trip's messages around relaxation and improvements to mood and sleep have proved very powerful to people who want their drinks to aid their health. More brands are following Trip into this space—like Three Spirit, a trio of 'plant-powered elixirs' that promise various mood benefits without the alcohol. Venues are also capitalising on the wave of interest, including the Nine Lives bar in London's Bermondsey, which has created a 'Noobies' range of drinks with nootropic ingredients.

#### Complementary, not competition

In markets where it is legal, cannabis is another alternative. In the US, CGA by NIQ's On Premise User Survey has shown more than a quarter (**28%**) of US consumers—and nearly half (**45%**) of 21 to 34 year-olds—have consumed cannabis in the last six months. Well over a third (**38%**) of cannabis users drink out weekly—far more than the all-consumer average of **25%**. They spend an average of \$167 a month on out-of-home eating and drinking, which is \$18 above average.

However, there is room for all these options to co-exist. Alcoholic drinks and alternative forms of relaxation and intoxication are meeting the same or similar need states, and it's not a zero-sum game. However, spirits and cocktails may have to respond by re-emphasising their role in helping people wind down and relax. Whether differentiating from alternatives or aligning with them, brands will need to acknowledge the competition and update their positioning.

**Top takeaway:** Consumers are choosing from a growing range of options to raise their moods and boost relaxation—but there is room for everyone in the market.



**"It's uncomfortable to say it, but some people are drinking less because they take more drugs. If we see global drug attitudes and policies continue to relax, the threat they pose to the On Premise could grow in the next five to ten years."**  
*Alex Kratena*

## Bursting the industry bubble

### How bar leaders can avoid insular thinking and see the full picture

The Madrid roundtable welcomed the world's best bartending's minds—but they were the first to admit that they don't always reflect what consumers think and want.

Perspectives can be very different between those behind and in front of the bar. There's often a disconnect between trends that are popular within the trade and those that are actually embraced by mainstream consumers. Drinks that are favourites among bartenders—like mezcal—can struggle to catch hold in the mainstream unless they are amplified by social media or other means.

#### Popping the bubble

This kind of insular thinking can compromise commercial performance and consumer engagement. Hospitality is not a unified entity but a vast collection of independent bubbles, each with different environments and consumers. From luxury venues to the humblest of bars, they sit on a vast spectrum. But the bubble mentality can create problems. It can lead to isolation from broader consumer needs, and make it harder to expand in the future. Escaping the bubbles, and understanding what the market really wants, is vital.

For drinks brands, the rich diversity of venues means future growth requires a flexible and personalised approach to the trade. They will need to recognise the limitations of focusing solely on parts of the market like elite bars, and respond to the demands of the whole range of venues and bartenders. Investment in education and outreach to under-represented areas of the industry can help brands unlock potential in the decade ahead.

**Top takeaway:** Consumers don't always behave the way we expect, and market knowledge is king in a fast-changing market.



**Hospitality is plural, not singular, and I like to compare it to a glass of champagne bubbling away. All the bubbles exist independently, but they're not representative of the whole product and they have to find their way to the top." Dylan Battick**

.....  
"Almost every time I've been told about the next big trend, I've been wrong. Trends need to hit the mainstream media to resonate with consumers, not just stay within the trade bubble." **Francois Monti**

.....  
"Sometimes we tend to think that the World's 50 Best Bars list represents what's happening in the world, but that's not true. If we think of the hospitality industry as an entire human body, those 50 bars represent less than one fingernail. So you have to think: what is happening in the rest of the body?" **Simone Caporale**

.....  
"Most people in bars have no clue that the list exists, so we're working in a bubble. We need to reach the **99%** of bartenders who find it less feasible to have a sustainable, long-term career in bartending... I'm not seeing anyone providing a solution to that." **Danil Nevsky**



## Bars in a volatile world

### The need to cope with unpredictability and respond nimbly to new challenges

In both hospitality and the wider world, the future is filled with uncertainty. A string of recent crises like recessions, COVID, regional and internal conflicts and sustained high inflation point to instability to come. The only predictable thing about the future is its unpredictability.

#### Rising to the challenges

Roundtable participants agreed that the aftershocks of many challenges continue to be felt. COVID restrictions exposed the vulnerability of the supply chain and disrupted hospitality in nearly every country. Soaring costs of many key ingredients, and of the energy and labour that the sector needs, has put businesses under severe strain, forcing some bars to close and others to rethink their offers.

This has also impacted consumers' attitudes to going out, and some behaviours are now very different to before COVID. For example, many have become more focused on their health, or moved from high-energy visits to bars to more relaxed ones. Economic challenges have forced some guests in all major countries to reduce the frequency of their visits, and their spending is likely to remain under pressure for some time. However, expectations haven't changed: people still want memorable and meaningful experiences, and

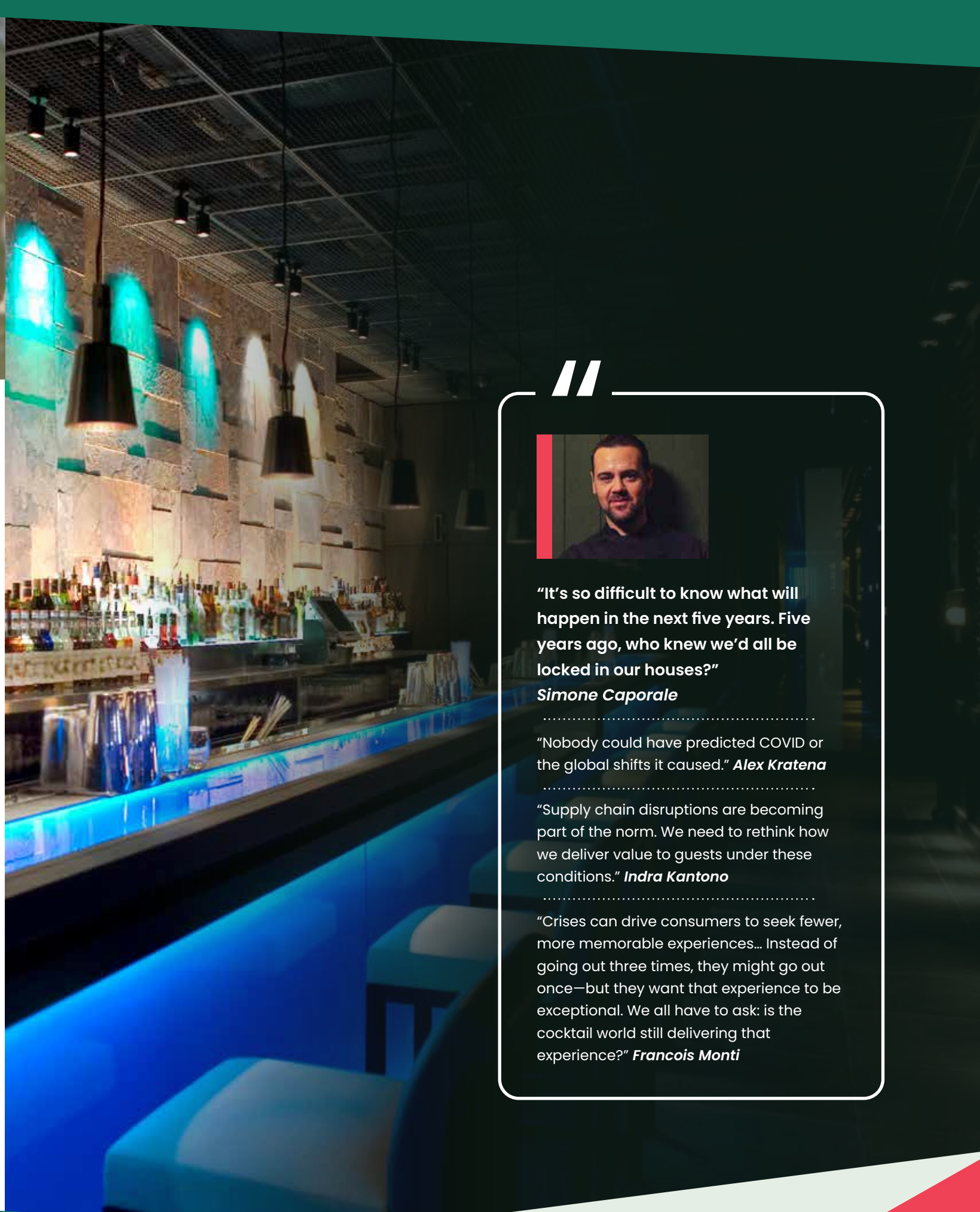
venues that deliver them are more likely to retain loyalty, especially during uncertain times.

#### Learning from a crisis

On the positive side, lockdowns, inflation and supply problems have all built up the toughness of businesses and forced them to become more agile and prepared for a crisis. Operators have learned to build resilience into their business models, and to prepare for future economic, social or health-related disruptions—however hard they may be to predict. We have also learned the importance of tailoring approaches to local markets and flexing global strategies and supply chains to meet specific regional needs.

In a volatile world, it's clear that businesses need to prioritise adaptability and innovation and establish the financial and operational buffers to weather unexpected challenges. Above all, they need to deliver the exceptional and experiential offerings that create emotional connections with guests and keep them coming back.

**Top takeaway:** *In an unpredictable world, change is the only constant—but crises have showed how well the industry can withstand big challenges.*



**"It's so difficult to know what will happen in the next five years. Five years ago, who knew we'd all be locked in our houses?"**

**Simone Caporale**

.....  
"Nobody could have predicted COVID or the global shifts it caused." **Alex Kratena**

.....  
"Supply chain disruptions are becoming part of the norm. We need to rethink how we deliver value to guests under these conditions." **Indra Kantono**

.....  
"Crises can drive consumers to seek fewer, more memorable experiences... Instead of going out three times, they might go out once—but they want that experience to be exceptional. We all have to ask: is the cocktail world still delivering that experience?" **Francois Monti**

## Top takeaways

### Eight of our Roundtable insights

**Bartenders need support.** Bar staff love their work, but they want more help—especially on wellbeing and progression. Meeting their needs will help businesses attract and keep more talent, and happy teams mean happy guests too.

**Drinkers want value and simplicity.** Luxury bars and intricate cocktails are still in demand, but more and more consumers are chasing good value and straightforward classic drinks. Whatever the price that is being paid, consistency and reliability will be the watchwords.

**Changing consumption patterns are driving lighter serves.** Younger consumers are chasing new social experiences and focusing on their wellbeing. They still want traditional drinks, but they sometimes also substitute for lighter options. This creates opportunities for new sales, but with Gen Z's expectations so high, bars and brands have to deliver consistent excellence.

**Social media rules—but disconnection is coming.** It's hard to overstate social media's influence on consumers' decision-making in the decade to come. Influencers and compelling content will make or break brands and venues. But at the same time, a backlash against always-on digital culture is leading some to disconnect and return to mindful, in-person experiences. There are exciting opportunities on both sides of this online-offline world.

**Growth needs both global and local mindsets.** Globalisation and industrialisation have powered the growth of big drinks brands and diversified people's choice. At the same time, consumers are sharply focused on their local lives and sustainability. For bars and brands, combining the two outlooks into a 'glocalisation' mindset is key.



**Alternative forms of intoxication are rising.** Bars and drinks brands are rethinking their strategies due to competition from alternative forms of intoxication, which is changing the social landscape in some markets. It will be crucial for bars and brands to find a harmonious way to co-exist in the face of alternative forms of intoxication

**We need to burst the industry bubble.** As industry professionals, we like to think we're on top of all the big trends—but it's consumers who decide whether fashions stick or not. Fixing this fragmentation, and understanding what the market really wants, will be essential in the years ahead.

**Adaptability is key.** In a volatile and unpredictable world, all brands and venues need to be ready to flex. The COVID crisis was tough, but it also taught valuable lessons about resilience and the power of connections with consumers. With more challenges certain to come, agility is the priority.

## Cocktails of the Future

### Leading bartenders craft their vision of cocktails of the future



### Remy Savage

#### The Cocktail



"We have been exploring "functional" ingredients for some time, and while I think the future may mean a lot of different things, I could see this profile of drink gaining in popularity over the next 10 years.

I quite like the contrast in texture and provenance of ingredients—on paper it shouldn't work but it somewhat does!"

#### Ingredients

30ml Martell Cordon Bleu  
15ml Sea Moss Gel  
30ml Watleseed cordial

#### The method

The ingredients are simply mixed and poured in your favourite tree bark inspired cut glass.



## Learn more

How CGA by NIQ and SIP by Pernod Ricard can power bar success



### About CGA by NIQ

CGA by NIQ provides definitive On Premise consumer intelligence that reveals new pathways to growth for the world's most successful food and drink brands. It works with food and beverage suppliers, consumer brand owners, wholesalers, government entities, pubs, bars, and restaurants around the world, and its expert market measurement and insights help guide their winning strategies.

#### Connect

- Visit [www.cgastrategy.com](http://www.cgastrategy.com)
- Charlie Mitchell, Head of Insights & Consumer Research
- Graeme Loudon, Global Customer Success Lead: On Premise
- Dylan Battick, Research Manager

Uncover new insights into the bartender world with CGA's upcoming Bartender Report 2025. Get in touch to find out more.



### About SIP by Pernod Ricard

We are a team of hospitality professionals who believe that sharing ideas, inspiring each other, and asking the right questions at the right time can actively shape the future of the industry. To bring these people together in one place, we created SIP: a lab for creatives, a playground for pioneers, a stage for game changers, and a home for convivialists.

We are an inclusive global community, connected by our ideas, experiences, expertise, and networks. Enjoy fascinating original content and live activities from respected local experts, which inspire better work, life, drinks, and hospitality. Together, we tackle the most pressing challenges of the day to keep progressing the culture of our industry.



For more follow us on [SIP\\_Global Instagram](#)

#### Connect

- Visit [www.join-sip.com](http://www.join-sip.com)
- Roland Krupinski, Head of Global On-Trade Development

### About our data

Data in this report is taken from CGA by NIQ's suite of research solutions, including:

- The **REACH** survey of views of 30,000 consumers in 38 of the most valuable On Premise markets across the globe, providing actionable insights needed to build global strategies and local market tactics that place brands at the forefront of modern consumer choice.
- The **2024 Global Bartender Report**, based on the BarSights survey of 1,500 hospitality professionals across 10 key countries and supported by bartender associations. This report delivers comprehensive and actionable insights of the crucial bartender community to help drive advocacy, access market intelligence and optimise supplier-bartender relations.
- The US **On Premise User Survey**, based on a survey of 15,000 visitors to the On Premise in the last three months. OPUS uncovers consumer behaviours, motivations and need states across channels, occasions and hospitality brands, enabling to shape brand and category strategies around the most profitable On Premise visits.