

CGA Cost of Living Consumer Pulse

October 2025

Northern Ireland



CGA's Cost of Living Consumer Pulse

Conducted 29th October – 10th November

66 Northern Ireland consumers

**Defined as consumers who typically visit On Premise at least once every three months*

Full GB&I sample nationally representative,
based on age, gender and region

Methodology

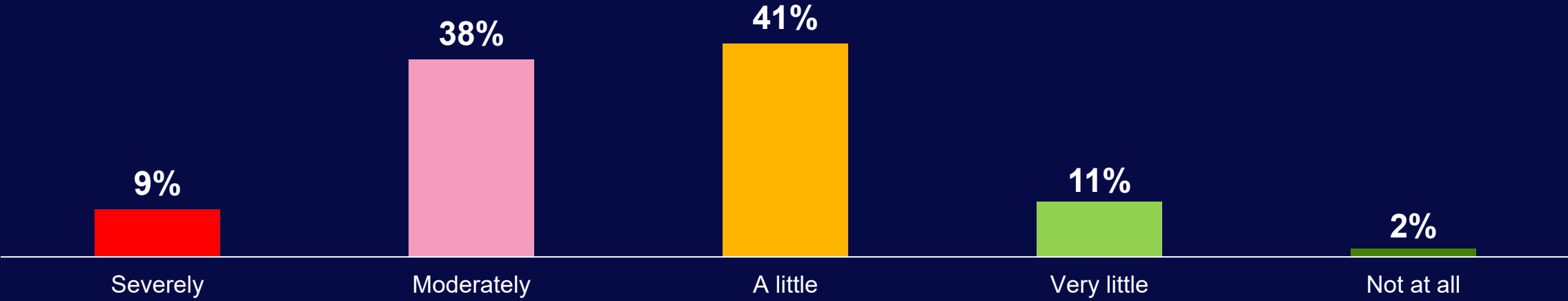
NIQ



On Premise Behaviours

Cost of Living pressures are being felt significantly less than a year ago, with the majority of consumers now being impacted only a little

How much is the cost of living crisis impacting you at the moment?



Change vs last month

=

-13pp

+13pp

+1pp

-2pp

Change vs October 2024

-5pp

-10pp

+19pp

+1pp

-4pp

CGA Cost of Living Consumer Pulse October 2025 sample: 66 NI Consumers vs 65 (September 2025) & 50 (October 2024)

The easing of financial pressure sees over 2 in 5 consumers are visiting the on-premise weekly, whilst over 4 in 5 visit monthly, but these decline vs last month

In the past month, how often have you been to restaurants, pubs, bars and other licensed venues?

42%

Of typical On-Premise visitors have visited the sector **at least weekly** in the last month

-2pp

vs last month

83%

Of typical On-Premise visitors have visited the sector **at least once** in the last month

-8pp

vs last month

CGA Cost of Living Consumer Pulse: 55 NI Consumers October 2025 vs 59 NI Consumers September 2025

The drop in visits has led to a net-decline in frequency from last month

Compared to my usual frequency, I am currently going out....

17%

Of consumers are going out **more frequently** than they typically do

-11pp vs last month

36%

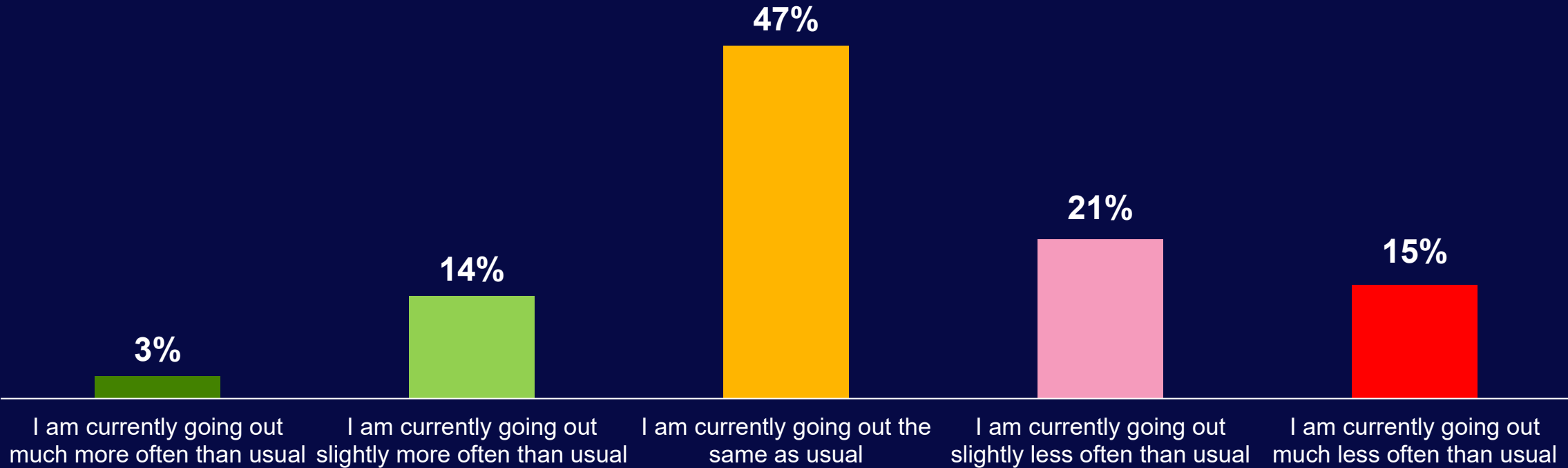
Of consumers are going out **less frequently** than they typically do

+2pp vs last month

CGA Cost of Living Consumer Pulse: 66 NI Consumers October 2025 vs 65 NI Consumers September 2025

These reductions are seen at the extremes with two thirds of consumers going out more or just as much as they usually do

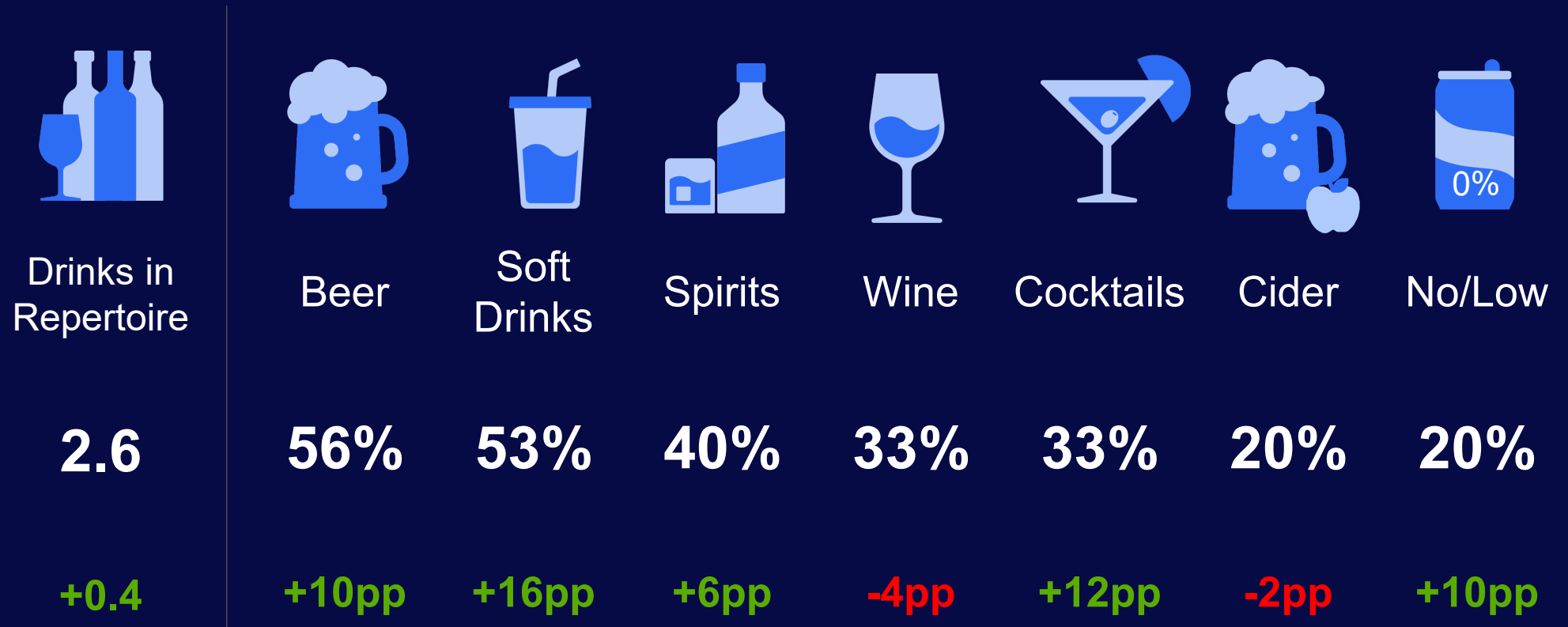
Compared to my usual frequency, I am currently going out....



CGA Cost of Living Consumer Pulse: 66 NI Consumers October 2025

Soft drinks see the biggest increase in popularity this month, moving to the 2nd place ahead of Spirits and Wine as Beer remains the most popular drinks category

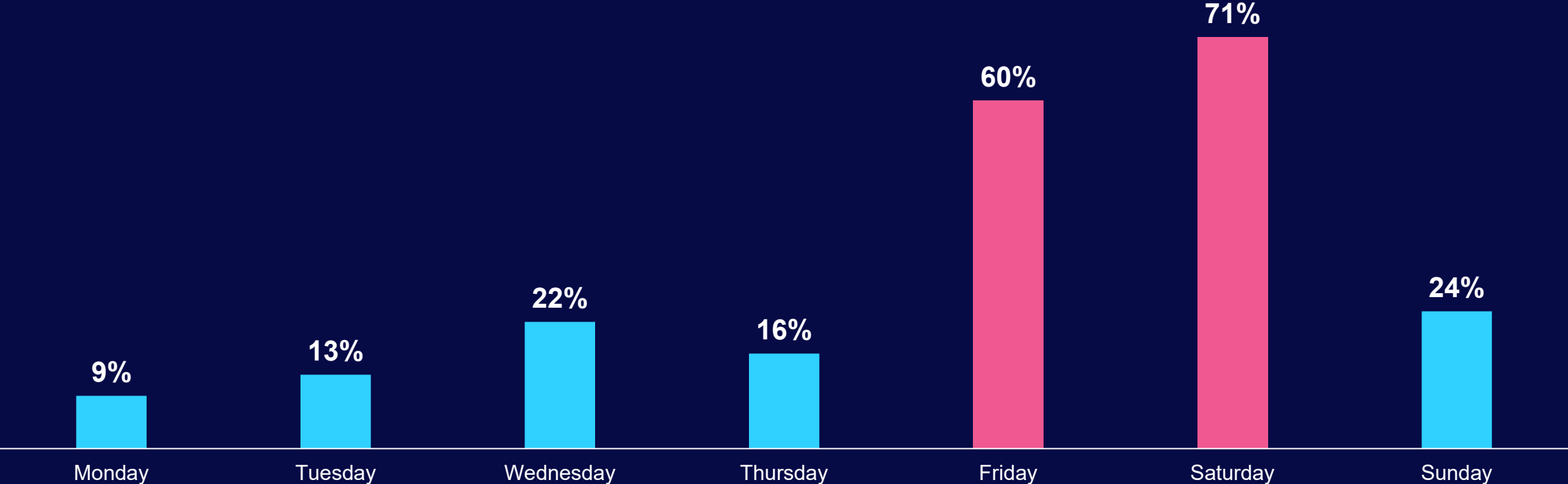
Which of the following have you had in bars, restaurants and similar venues in the past month?



CGA Cost of Living Consumer Pulse (55 NI Consumers) October 2025 vs (59 NI Consumers) September 2025

Weekends remain the key driver of visits, with half of consumers visiting on either Friday or Saturday

On which day(s) of the week have you visited a bar, restaurant or other similar venue over the past month?



CGA Cost of Living Pulse Survey October 2025: 55 NI Consumers

Impact of the cost-of-living crisis

Consumers are predominantly maintaining spend but a treat spend mentality is a driver for those that are spending more

Average spend in the On-Premise

£116

over the past month

*How does this compare to how much you usually spend?
Index vs last month*



CGA Cost of Living Consumer Pulse: 66 NI Consumers October 2025 vs 59 NI Consumers September 2025

Outlets continue to score highly around levels of quality, but there has been a drop off this month for overall experience and service, which are key factors in driving repeat visits

*How satisfied have you been with the following areas on your most recent visit out?
% very satisfied or satisfied – Index vs last month*



Quality of overall experience

88%

-3pp



Quality of service

85%

-9pp



Overall value for money

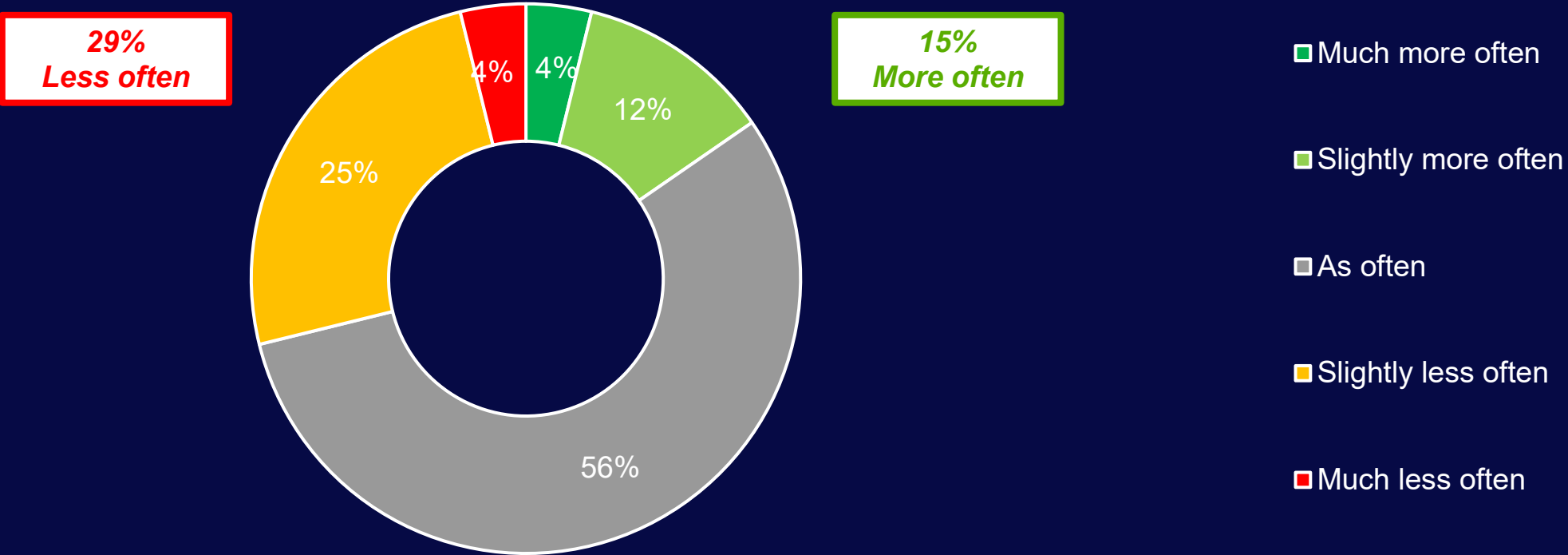
70%

+4pp

CGA Cost of Living Consumer Pulse October 2025 sample: 66 NI consumers (vs September 2025: 65 NI Consumers)

Looking forward to November, over two thirds of consumers are planning to maintain or increase visits to the On Trade

How frequently do you predict that you will visit hospitality venues in the next month, compared to how frequently you have visited so far this year?



CGA Cost of Living Consumer Pulse October 2025 sample: 52 (NI Consumers) vs 54 (NI Consumers) September 2025

This increase in visits provide opportunity to the whole on premise, with both outlet types benefiting

Are you planning to go out for the following visits in the next month?



To eat

55%

+4pp
vs this month



To drink

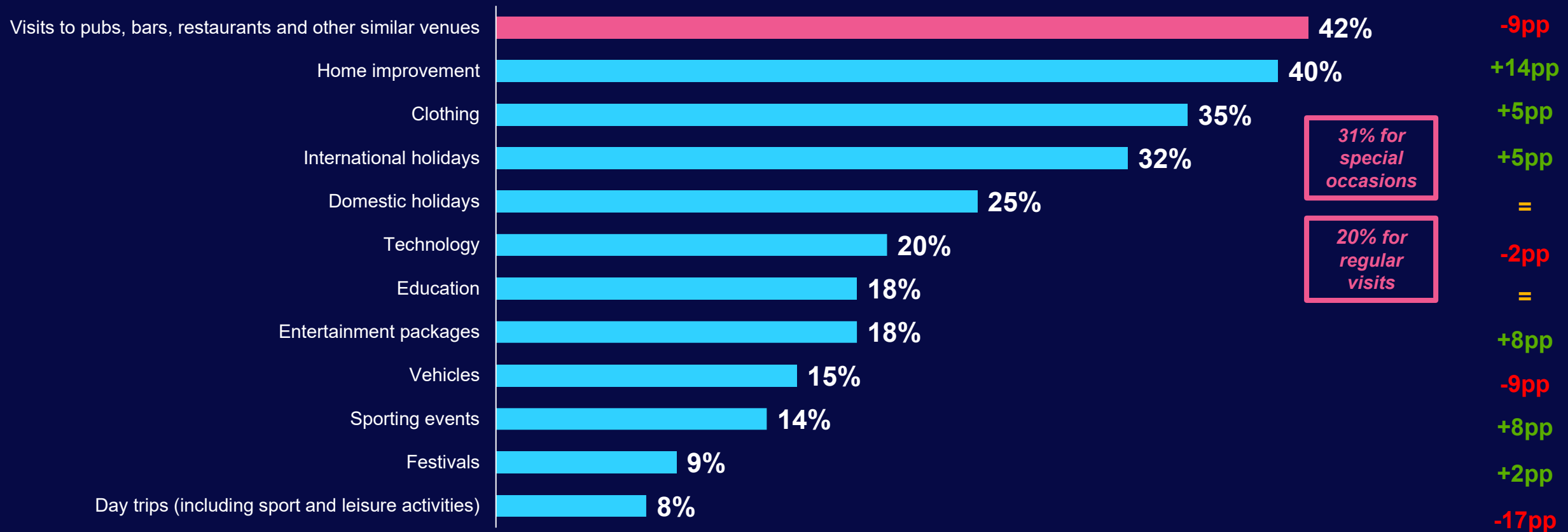
50%

+4pp
vs this month

CGA Cost of Living Consumer Pulse Octoberr 2025 sample: 66 NI Consumers (vs September 2025: 65 NI Consumers)

Following the Summer period where spending habits fluctuate, we now return to On Trade visits as the most important luxury expense consumers will prioritise

With the recent economic situation and after covering living expenses, which of the following do you plan to prioritize for spending over the next 12 months*?

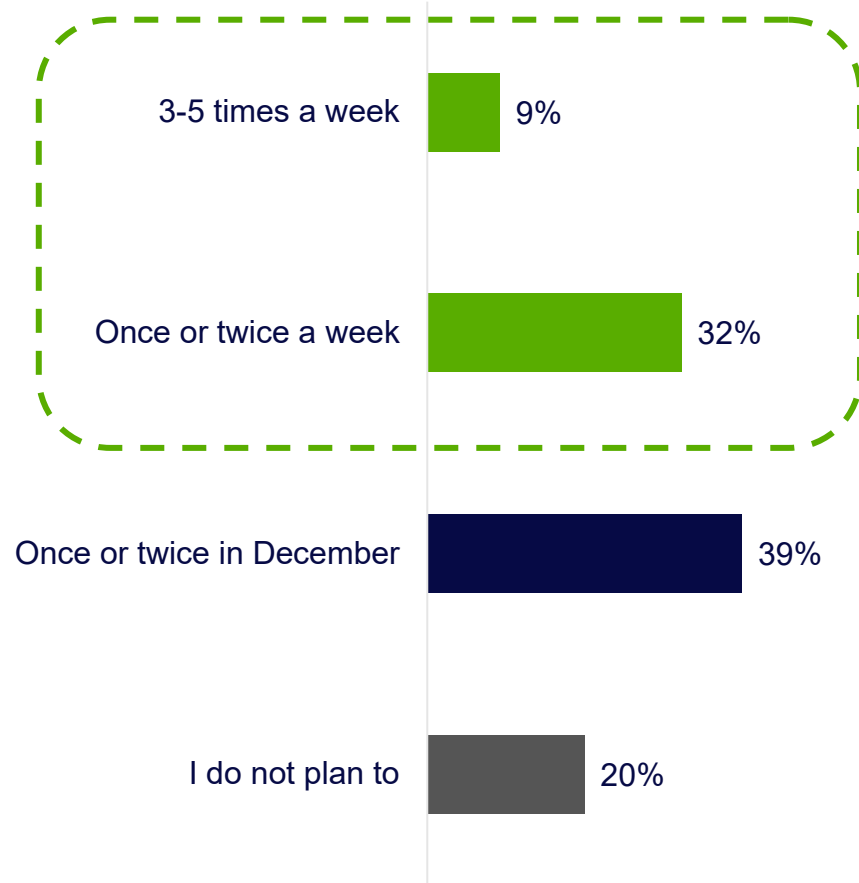


CGA Cost of Living Consumer Pulse October 2025 sample: 65 (NI Consumers) vs 65 (NI Consumers) September 2025

Hot Topic: Christmas

2 in 5 consumers plan to visit the On Premise weekly during the Christmas period, highlighting key seasonal opportunities

How often do you plan to go out to bars, restaurants, pubs or similar venues over the Christmas period?

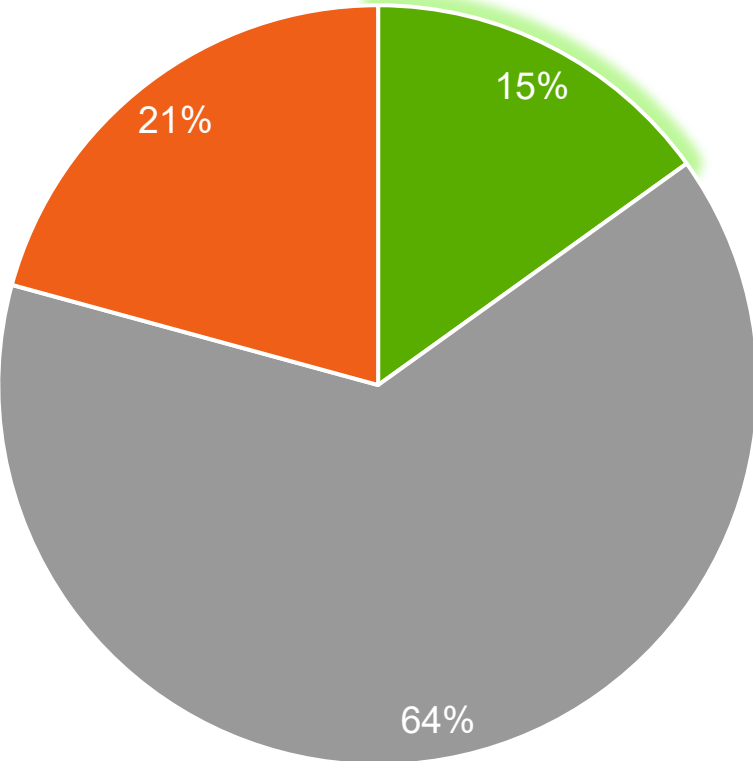


41%
at least once a week



Nearly 1 in 6 consumers are planning to go out more this year, further reinforcing the opportunities of the festive season

And how does this compare to how often you visited bars, restaurants, pubs or other similar venues over the Christmas period last year?



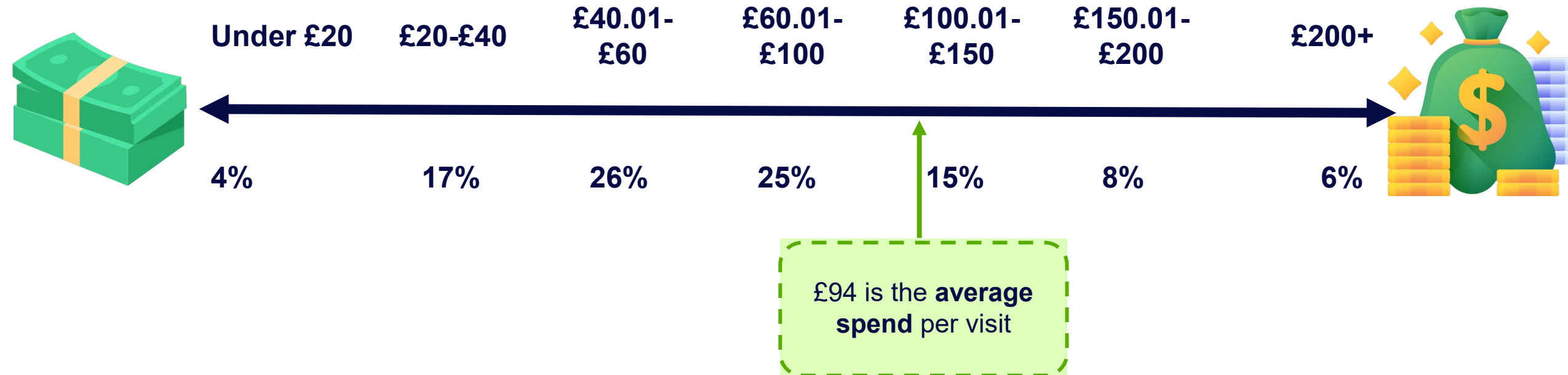
- I am planning to go out more frequently this year compared to last year
- I am planning to go out the same amount this year compared to last year
- I am planning to go less frequently this year compared to last year



CGA Cost of Living Consumer Pulse October 2025 sample: 53

On average consumers will spend £94 in bars, restaurants and similar venues per visit over Christmas, illustrating revenue potential for operators

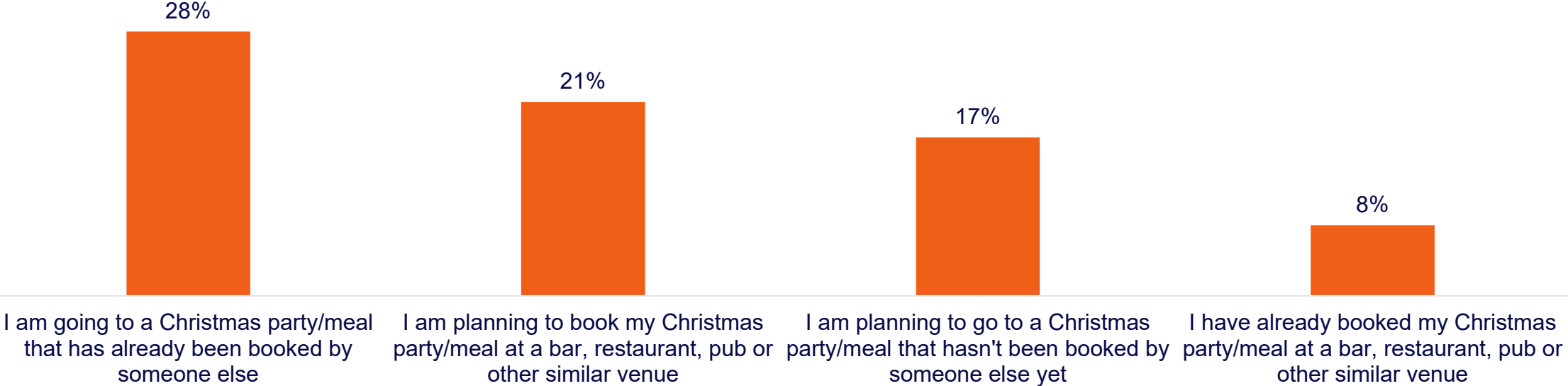
How much do you plan to spend per-visit on going out to bars, restaurants, pubs or other similar venues over the Christmas period?



3 in 4 consumers will go out for a Christmas party/meal reinforcing the strong demand for festive On Premise engagement

Which of the following statements best describes how you're planning your Christmas party/meal out at a bar, restaurant, pub or other similar venue?

26% of consumers are not going out for a Christmas party/meal



CGA Cost of Living Consumer Pulse Summary *October 2025*

Consumers felt an easing of cost-of-living pressures this month

- Despite the financial easing, both weekly and monthly visits were down from last month, however engagement with the trade remains high

30% of consumers have seen an increase in spend in the On Premise

- However consumer perceptions of value for money have increased this month indicating that they feel this increased spend is worth it. We have seen a decline in quality of service & experience although they continue to be exceptionally high, but it is essential to ensure these are maintained to drive repeat visits

Whilst the majority of consumer look to maintain their level of visits in November, there could be a net decline as thoughts turn to the festive period

- Both Eating and Drinking occasions could see an increase in visits, as food remains a key driver of bringing consumers out into the trade
- The On Premise remains the most important luxury spend for consumers

4-in-5 consumers are heading to the On Premise to celebrate over the Christmas Period

- 41% of consumers plan to visit the Trade weekly over the Christmas period, whilst Christmas party/meals are another driver of consumers to the trade as just under three-quarters of consumers are planning to visit for this occasion which drives treat spend