

The Future Role of Bars in Europe

A nine-market independent study of social connection, moderation, changing behavior and the future of hospitality in Europe.



Research commissioned by Heineken in JUNE 2026

Research at a glance

To better understand how social connection, moderation, consumer behaviour and hospitality are evolving, HEINEKEN commissioned an independent study across nine European markets. Surveying 9,227 adults, the research explores how people are socialising today, what they expect from hospitality venues, and how bars are adapting to meet changing needs.

Current headlines about the decline of bars tell only part of the story. HEINEKEN's independent study suggests something different: bars and bargoers across Europe are adapting to a new social reality.

Remote work, digital friendships, and social isolation have reshaped how people spend time together. Against this backdrop, Heineken commissioned the Future Role of Bars study to examine whether bars continue to serve a role across Europe, then examine how that role is changing as lifestyles, drinking habits and expectations shift.

The research found that declining visits does not mean declining attachments to bars. More people report visiting bars less often than five years ago, yet 60% to 85% expect bars to remain important over the next decade, while 83% to 97% say society would lose something if bars disappeared.

That tension matters beyond the hospitality sector. The future bar people want is a place for big nights and quiet catchups, regulars and first-timers, drinkers and non-drinkers alike. Increasingly, people expect bars to offer more, including food, music and sport to events and community, while remaining affordable, welcoming and compatible with a broader array of consumption habits.

Today's research points to five factors shaping continued relevance of bars as they evolve for the next generation: affordability, a welcoming atmosphere, opportunities for social connection, experiences beyond drinks and compatibility with moderation.

Top 5 factors shaping the Future Role of Bars

1. Affordability
2. Welcoming atmosphere
3. Opportunities for social connection
4. Experiences beyond drinks
5. Compatibility with moderation

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Methodology at a glance

The Future Role of Bars study combines three research methods:

- **European consumer survey**
9,227 adults aged 18+ across nine European markets: Austria, Belgium, Greece, Ireland, Italy, the Netherlands, Poland, Spain and the UK, with approximately 1,000 respondents per market and a dedicated secondary analysis of adults aged 18–34. Survey fieldwork took place between 1 and 14 July 2026.
- **Search and behavioural analysis**
- **Social and cultural intelligence**

The research includes European, market-level and generational comparisons.



The New Economics of Going Out

Europeans are spending less time socializing face to face. Across 21 European OECD countries, the share of people interacting with friends in person every day fell from 21% in 2006 to 12% in 2022. Almost one in five people across 30 OECD countries lived alone in 2022, up from 15% a decade earlier.

The Future Role of Bars research places changing bar-going habits within this wider shift in social life. Reported visits have declined across several markets, although perceptions of the social value of bars remain strong.

The pattern varies by country. Austria combines declining participation with strong community value: 83% say something is lost when a local bar closes. Ireland retains the clearest pub legitimacy, with 97% identifying something society would lose if pubs disappeared. In the Netherlands, 55% describe bars as declining, yet 70% still expect them to remain important over the next decade.

The gap between visitation and perceived value raises a question about what now determines whether people go out.

Affordability is a top three priority for the future role of bars for 45% to 79% of respondents across the nine markets. It ranks first in eight of the markets. Spain is the exception, with food taking the top spot.

But contrarily, price does not determine where people go after they decide to leave home. Atmosphere is the leading factor when choosing a bar today in every market surveyed.

In Austria, 57% say affordable prices would encourage them to spend more time in bars, and 62% select affordability among their top three priorities for bars of the future. In the Netherlands, 56% say affordable prices would encourage more bar visits and 79% placing affordability in their future top three.

The common thread is that going out is a multifactor decision, with price affecting whether an outing feels accessible and atmosphere being the leading consideration in where people choose to spend their time.

While this pattern is consistent across markets, how it plays out locally varies. The table below shows how affordability, atmosphere and other priorities come together to shape the bar occasion in each market.

Market	% putting affordability in their top 3 priorities for Future bars	Where affordability ranks	Number 1 factor when choosing a bar today	What else makes the occasion locally relevant?
Austria	62%	#1	Atmosphere	57% say affordable prices would encourage more bar time; community (48%) and music (47%) are also major future priorities
Belgium	71%	#1	Atmosphere	63% visit to meet friends/family and 56% to relax; 53% mainly use café/restaurant bars
Spain	45%	#2 (Food is #1)	Atmosphere	52% visit for food and 55% to relax; 83% mainly use hybrid bar formats
Greece	68%	#1	Atmosphere	60% visit to relax; music is a defining experience layer, reaching 65% among Gen Z as a future priority
Ireland	64%	#1	Atmosphere	60% mainly use traditional pubs, while 77% expect the best future bars to offer more than drinks
Italy	52%	#1	Atmosphere	64% visit to meet friends/family; food (46%) and events (37%) broaden the future occasion
Netherlands	79%	#1	Atmosphere	56% say affordable prices would encourage more bar time; atmosphere itself would encourage 31%
Poland	59%	#1	Atmosphere	68% visit to meet friends/family and 44% for food; 60% mainly use restaurant/café bars
United Kingdom	69%	#1	Atmosphere	81% say communities lose something when a local pub closes; food and community broaden the occasion

People are searching for a reason to connect and activities are a leading answer to their queries.

Search data provides another view. People are increasingly looking for activities such as quizzes, match viewing, games cafés, tardeo and aperitivo.

In Spain, searches for tardeo grew 32.6 times, pointing to interest in earlier, food-led forms of socializing. In the UK, searches for “pub quiz near me” grew 15.3 times.

What is tardeo?

Tardeo is a popular Spanish trend where people socialize, enjoy drinks and tapas, or even party to a DJ during the afternoon and early evening rather than late at night. It offers all the fun of a night out but wraps up early enough for you to get a full night's sleep.



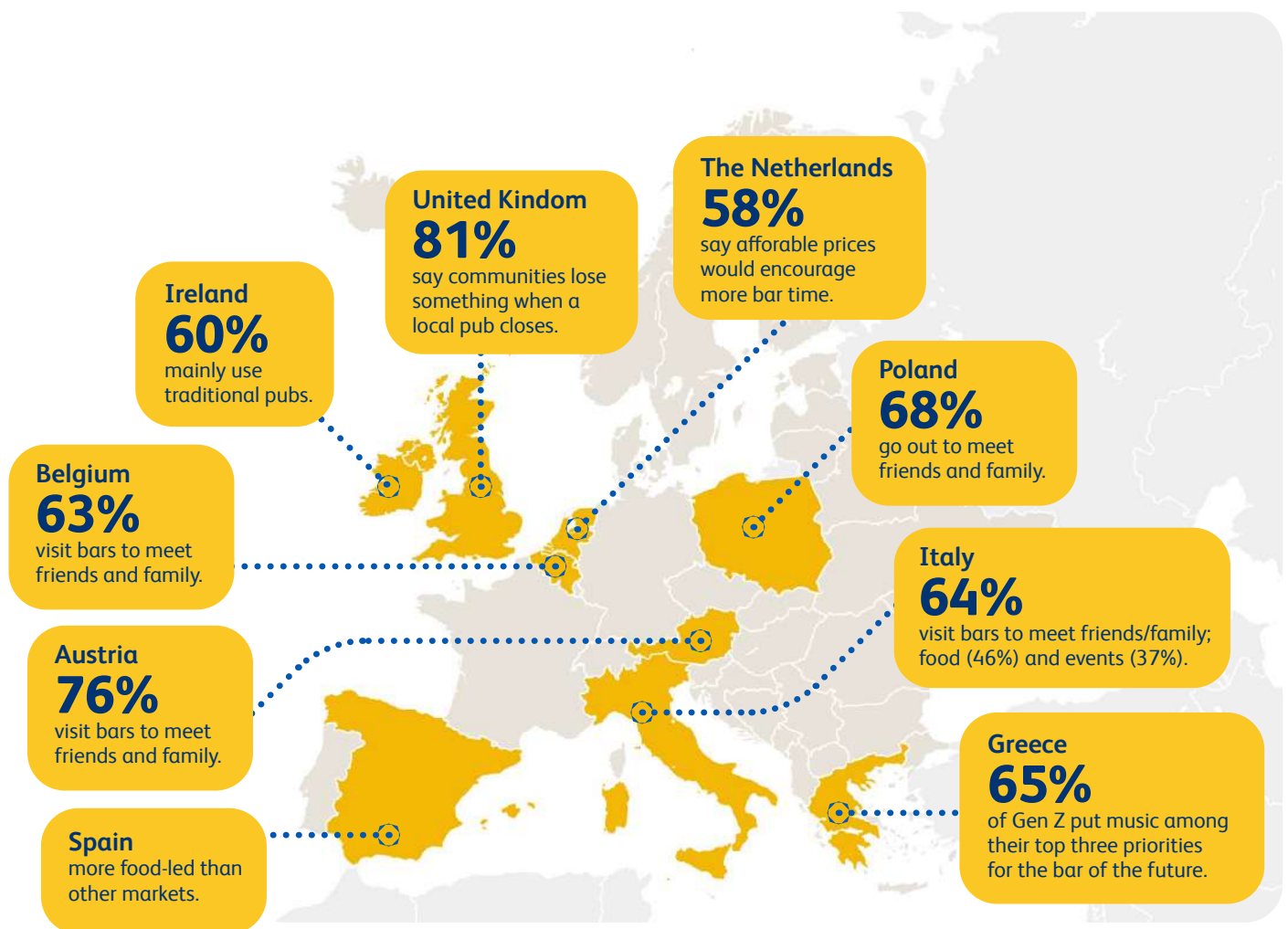
The reason to go out is not the same everywhere.

According to the survey, in Austria, 76% visit bars to meet friends and family. In Belgium, 63% cite friends and family and 56% relaxation. In Poland, 68% go to meet friends and family, while 44% go for food.

Spain is more food-led. In Greece, music is particularly important to younger consumers, with 65% of Gen Z putting it among their top three priorities for the bars of the future. In Ireland, 60% mainly use traditional pubs, even as 77% expect the best future bars to offer more than drinks.

Across these differences, meeting friends and family, relaxing, eating, listening to music and taking part in shared activities all feature in the reason to go to a bar. While the mix varies substantially between markets, bars consistently remain places where people indicate they want to meet and participate in shared experiences.

The findings also provide context for the gap between visitation and perceived value. Cost, changing routines and a wider choice of leisure activities all form part of the decision to go out. The research indicates that the role of bars within those decisions is becoming more varied across markets and nights out.



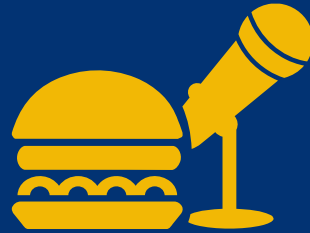
As the way Europeans socialize changes, what role will bars continue play in bringing people together?



Between

83-97%

say society would lose something if bars disappeared.



Between

62%-77%

expect the best bars of the future to complement their drinks offer with food, entertainment and other social experiences.

70%

of younger generations use bars differently than previous generations.

73%

of Gen Z feel bars will remain important whereas only 52% feel bars are adapting well today.

8 of 9 markets

put affordability in their top 3 going out factors.

Moderation and changing social habits

Moderation is becoming a more established part of social life and it's changing how groups go out. Among the 51% to 68% of respondents who say they have reduced their alcohol consumption, 26% to 55% say reducing their drinking has also reduced how often they go out socially.

Low- and no-alcohol choices are becoming increasingly normalised: separate HEINEKEN/Ipsos research across five markets, including Spain, found that 80% of respondents saw low/no choices as more socially acceptable than five years ago, while alcohol-free beer now accounts for 14% of beer consumed in Spain, with more than one in four Spaniards consuming it. (HEINEKEN/Ipsos, 2025; Cerveceros de España, 2026) . In Belgium, household purchases of alcohol-free beer, wine and spirits grew 17% year-on-year. (YouGov, 2025; reported via Belgian media). HEINEKEN media analysis also finds growing industry attention on producers expanding low- and no-alcohol portfolios in response to changing consumer behavior.

In Ireland, 62% have reduced their alcohol consumption and 55% of those reducers say they go out less, even though 70% see low/no options as making bars more inclusive. In Greece, 68% have reduced their alcohol consumption, while half of reducers say they go out less.

However, while evidence points to more selective drinking occasions, that does not correlate to reduced social participation in every market.

The relationship between moderation and socializing varies between markets. Italy provides a counterpoint, where reducing alcohol appears more compatible with continued participation, although the research indicates greater pressure among Millennials.

IWSR research across 15 markets found that the average number of beverage categories consumed on a single occasion fell from 2.4 in 2023 to 1.8 in 2024. Over the same period, the proportion of occasions involving only one beverage category rose from 49% to 66%. IWSR also identifies temporary abstinence as an increasingly established approach to moderation.

The social setting around moderation

Low/no options can make bars more accessible to people who are moderating or not drinking. The survey also indicates that availability alone does not determine how frequently people go out. Data suggests that there is a wider pressure determining whether a group goes out in the first place: the need for a shared activities.

Canvas8 research on Yearning to Connect and How secular spiritual communities help tackle loneliness similarly points to the emergence of shared rituals, sober socials and interest-led gatherings as ways of maintaining connection beyond traditional drinking occasions. For groups with different drinking preferences, food, live music, sport, quizzes and celebrations provide a common focus.

This places moderation within a broader change in social habits. The range of drinks available remains relevant to inclusion. The wider social context – who is there, what people do together and the setting in which they meet – also shapes participation. For bars, the opportunity is to make different drinking choices unremarkable within the same social experience. The bar of the future does not need everyone to drink the same way but needs to give them a reason to stay together.

Across all nine markets in the Future Role of Bars study, Gen Z visits bars more frequently than the national population.

The difference is substantial in some countries. In the Netherlands, 39% of Gen Z are frequent bargoers, compared with 23% nationally. In Greece, the figures are 61% and 46% respectively. Gen Z is also ahead of the national rate by 12 percentage points in Austria and Ireland, 10 points in Italy and Poland, and eight points in Belgium and the UK.

Current frequency provides only one measure of participation. When respondents aged 23 and over compare their bar-going with five years ago, the picture varies considerably by market.

Compared with five years ago, more Gen Z respondents report going more often in the UK, Belgium, Italy and Spain. The picture is close to even in Greece, while the reverse is true in Austria, Ireland, the Netherlands and Poland.



Gen Z is not abandoning bars

The comparison with Millennials adds another dimension. Millennials record a more negative five-year balance than Gen Z in every market surveyed.

Spain provides one of the clearest examples. Gen Z and Millennials have the same rate of frequent bargoers today, at 65% each, but their trajectories look very different. Gen Z's five-year visitation balance is broadly stable at +2 percentage points. Among Millennials, it is -34 points.

The pattern also appears in markets where Gen Z's own five-year balance is negative. In Ireland, 53% of Gen Z are frequent pub-goers, compared with 40% of Millennials. Their five-year balances are -11 and -35 percentage points respectively. In the Netherlands, frequent bar-going stands at 39% among Gen Z and 28% among Millennials, with five-year balances of -18 and -50 points.

These comparisons show why current frequency and reported change over time need to be considered separately. Across the nine markets, Gen Z is currently more likely than the national population to visit bars frequently. Its five-year direction is mixed. Relative to Millennials, however, Gen Z records the stronger five-year balance in every market surveyed.

Gen Z's enthusiasm comes with conditions

Frequent visits do not mean bars can take Gen Z for granted. The research also examines the expectations of the experience itself.

Some 73% expect the best bars of the future to offer more than drinks. Separately, 52% say bars are adapting well to changing consumer needs today. These are different survey measures rather than two ends of the same scale, yet they point in the same direction: younger adults have substantial expectations of future bars while current adaptation receives more mixed endorsement.

Food, music, sport and live experiences feature among the factors shaping future expectations. Low- and no-alcohol choices can accommodate different drinking preferences within the same group, and affordability remains an important consideration in access to the visit.

Taken across the nine markets, the Gen Z findings resist a single trajectory. Younger adults currently participate frequently, although reported five-year change differs considerably by country. Their expectations also extend across the wider bar experience, from price and drinks choice to food, music, sport and other activities.

The result is a generation that appears less interested in abandoning bars than in renegotiating what makes them worth visiting. Their behavior offers a glimpse of how perceptions of worthwhile reasons to go out are evolving, and what will make bars relevant for the future.

Gen Z bar-going is stronger than the national average across all nine markets

Gen Z visits bars more frequently than the national population in all nine markets. The gap is largest in the Netherlands and Greece, where Gen Z frequent visitation is around 15–16 percentage points above the national rate. But higher current frequency does not necessarily mean visits are increasing: five-year Gen Z momentum is positive in only four markets (the UK, Belgium, Italy and Spain) while Greece is close to balance, and the remaining four markets are negative.

Market	National frequency	Gen Z frequency	Gen Z vs national	Gen Z five-year balance*
Austria	22%	34%	+12pp	–40pp
Belgium	31%	39%	+8pp	+5pp
Spain	64%	65%	+1pp	+2pp
Greece	46%	61%	+15pp	–5pp
Ireland	41%	53%	+12pp	–11pp
Italy	65%	75%	+10pp	+4pp
Netherlands	23%	39%	+16pp	–18pp
Poland	23%	33%	+10pp	–22pp
United Kingdom	44%	52%	+8pp	+12pp

Gen Z outperforms Millennials on five-year bar-going momentum

Market	National frequency	Gen Z frequency	Gen Z vs national	Gen Z 5-year balance*	Millennial frequency	Millennial 5-year balance*
Austria	22%	34%	+12pp	–40pp	23%	–51pp
Belgium	31%	39%	+8pp	+5pp	26%	–33pp
Spain	64%	65%	+1pp	+2pp	65%	–34pp
Greece	46%	61%	+15pp	–5pp	51%	–40pp
Ireland	41%	53%	+12pp	–11pp	40%	–35pp
Italy	65%	75%	+10pp	+4pp	65%	–30pp
Netherlands	23%	39%	+16pp	–18pp	28%	–50pp
Poland	23%	33%	+10pp	–22pp	26%	–48pp
United Kingdom	44%	52%	+8pp	+12pp	54%	–18pp

Footnote: Frequency = percentage visiting bars/pubs weekly or more often or two to three times a month. Gen Z = ages 18–29; Millennials = ages 30–45. Five-year balance = percentage saying they visit more often minus percentage saying they visit less often than five years ago. For Gen Z, B2 is restricted to ages 23–29; Millennials are all ages 30–45. “About the same” remains in the denominator. Balance figures use the rounded percentages shown in the survey reporting. Five-year change is retrospective self-report, not longitudinal footfall tracking; no statistical significance testing was supplied.

Bars still hold an important place in European social life

At a time when face-to-face social connection is becoming harder to maintain, Europeans continue to place significant value on bars as places that bring people together.

In Spain and Italy, the research points to strong confidence in the continued role of bars, with food helping to broaden the occasion. In the UK and Ireland, pubs retain a strong community role. Greece places greater emphasis on music, while the Netherlands and Austria show how enthusiasm for bars can coexist with significant pressure on participation.

One finding, however, is consistent across all nine markets: atmosphere is the leading factor when people choose a bar today. The formats may change, but the underlying need is the same: place where people can spend time together in person.

That helps explain the central tension running through the research. Affordability is making people more selective. Moderation is changing drinking behaviour. Younger adults expect greater choice and more from the experience. Yet none of these shifts have removed the underlying demand for places where social life can happen in person.

Bars cannot assume that cultural value automatically translates into more visits. As social habits change, the role bars play is evolving too.

But, most strikingly, at a time when maintaining face-to-face connection is becoming harder, Europeans continue to believe that losing bars would mean losing more than somewhere to have a drink.



Bars matter across Europe, but for different reasons

Market	Proof	What makes it different
Austria	83% see loss when a local bar closes; even 96% of non-goers identify societal loss	Valued beyond its customers: the neighborhood role survives weak participation.
Belgium	94% identify societal loss; 53% mainly use café/restaurant bars	The hybrid bar: friends, food and unwinding are broadening the occasion.
Spain	85% expect bars to remain important; 83% mainly use hybrid formats	The future may already be here: food-led, flexible bar culture is already established.
Greece	95% identify societal loss; music is a future priority for 62%	The social stage: music and entertainment give people a reason to gather.
Ireland	97% identify societal loss; 60% still mainly use traditional pubs	Evolve without erasing: broaden the occasion while protecting pub identity.
Italy	96% identify societal loss; 61% mainly use café/restaurant bars	Adaptation already embedded: the bar works across food, socialising and flexible drinking.
Netherlands	76% see loss when a local bar closes; 79% prioritise affordability	Relevance without conversion: value and atmosphere need to turn belief back into visits.
Poland	70% value bars for face-to-face connection; 57% see them as a route beyond existing circles	The social bridge: bars create opportunities to meet beyond established groups.
United Kingdom	81% see community loss when a local pub closes; 69% prioritise affordability	Stretch the pub, don't replace it: preserve the institution while widening the occasion.

Those differences shape distinct local bar occasions

Market	Local occasion	Proof point
Austria	Friends + local character	76% visit to meet friends/family
Belgium	Relaxed café-bar socializing	63% friends/family; 56% relaxation
Spain	Food-led social retreat	52% food; 55% relaxation
Greece	Music-led social stage	65% of Gen Z put music in their future top three
Ireland	The broadened traditional pub	60% mainly use traditional pubs
Italy	Food, friends + flexible drinking	64% friends/family; food and low/no already part of the occasion
Netherlands	Atmosphere + value	Atmosphere distinguishes the venue; affordability determines access
Poland	Food-and-friends social access	68% friends/family; 44% food
United Kingdom	Familiar pub + shared occasions	Community, sport, food and flexible groups shape the local expression

Conclusion

Europeans are becoming more selective about going out, but not less interested in being together. As cost, moderation and changing lifestyles reshape social life, bars are evolving around what people increasingly value: atmosphere, shared experiences, flexibility and connection.

The future of the bar is therefore not simply about getting people to drink more or go out more often. It is about remaining a place worth coming together for.



Methodology

The Future Role of Bars study surveyed approximately 9,000 adults aged 18+ across Austria, Belgium, Greece, Ireland, Italy, the Netherlands, Poland, Spain and the UK, with around 1,000 respondents per market.

Country sample sizes

Austria n=1,038 Belgium n=1,014 Spain n=1,026 Greece n=1,023 Ireland n=1,021 Italy n=1,013 Netherlands n=1,023 Poland n=1,023 United Kingdom n=1,046

Market	Total sample 18+	Generation-coded base 18–80	Dedicated 18–34 base	18–34 bar visitors ¹	18–34 alcohol reducers ²	Gen Z five-year base 23–29 ³
Austria	1,038	1,030	301	266	188	107
Belgium	1,014	997	276	235	163	113
Spain	1,026	1,018	286	275	183	100
Greece	1,023	1,020	326	310	217	132
Ireland	1,021	1,004	263	240	166	90
Italy	1,013	1,008	263	253	145	93
Netherlands	1,023	1,006	279	236	150	114
Poland	1,023	1,018	275	240	188	58
United Kingdom	1,046	1,023	292	271	145	108
TOTAL	9,227	—	2,561	2,326	1,545	—

* 18–34 bar visitors: Respondents aged 18–34 who report visiting bars/pubs; used for visitor-routed questions such as reasons for visiting and venue choice.

** 18–34 alcohol reducers: Respondents aged 18–34 who report reducing alcohol significantly or somewhat; this is the base for the question asking whether drinking less has reduced social outings.

*** Gen Z five-year base: Respondents aged 23–29 only. The five-year question is not asked to Gen Z aged 18–22 because they cannot make a comparable five-year adult bar-going assessment.

Question / measure	Who was asked?	Question details
B1 current visit frequency	All adults 18+	Basis for current frequency and visitor/non-goer definitions.
B2 compared with five years ago	Age 23+ only	Retrospective self-report: more often / same / less often. It is not longitudinal footfall data.
B3 reasons for visiting	Bar/pub visitors only	Multi-select; percentages can add to more than 100%.
B4 most important choice factor	Bar/pub visitors only	Single choice one factor only.
B5 venue type used most often	Bar/pub visitors only	Single choice.
R1 social/community role statements	All adults	"Agree" figures generally combine Agree + Strongly agree.
R2 what would be lost if bars disappeared?	All adults	Single choice. "Something would be lost" is derived as everyone except "Nothing".
R3 community spaces people would miss	All adults	Ranking question. Be explicit whether reporting ranked first or top three.
M1 reduced alcohol consumption	All adults	"Reduced" combines "Yes, significantly" + "Yes, somewhat".
M2 has drinking less reduced social outings?	Alcohol reducers only	This is a routed subgroup. Never describe its percentage as a percentage of all adults.
M3 low/no inclusion and comfort	All adults	Agreement statements; inclusion and personal comfort are separate measures.
M6 changes that would encourage more bar time	All adults	Select up to three; not a single-choice ranking.
F1 future expectations	All adults	Agreement statements, including "remain important" and "more than drinks".
F2 future priorities	All adults	Top-three ranking incidence. "59% chose affordability in their top three" not "59% say affordability is the number-one priority."
F3 declining/evolving/thriving	All adults	Single-choice perception of the category today.
F4 future direction	All adults	Single-choice future outlook.
G2 factors when choosing a bar	Ages 18–34 only	Rank top three. Do not call this a Gen Z result.
G3 features appealing to younger adults	All applicable respondents	Select up to three; perception of what appeals to younger adults.

B3/B4/B5: respondents who visit bars/pubs at least occasionally.

M2: only respondents who said they had reduced their alcohol consumption.

B2 five-year Gen Z comparison: ages 23–29 only, because an 18-year-old cannot meaningfully compare their bar-going with five years earlier.

Data sources & guide

How to read the data:

- **Current bar visitation:** All adults aged 18+ were asked how often they visit bars or pubs. A bar visitor is anyone who visits at least occasionally; a non-goer is someone who answers “Never”. Frequent visitors are those who go weekly or more often, or 2–3 times a month.
- **Five-year visit change:** Only respondents aged 23+ were asked whether they visit bars more often, about the same or less often than five years ago. Where a five-year “balance” is shown, it is calculated as % more often minus % less often. It is a retrospective self-reported measure, not measured footfall or a forecast.
- **Visitor-only questions:** Reasons for visiting, the single most important venue-choice factor and most-used venue format were asked only of people who visit bars or pubs. Reasons for visiting are multi-select; venue choice and venue format are single-choice measures.
- **Moderation:** An alcohol reducer is someone who says they have reduced their alcohol consumption significantly or somewhat in recent years. Only reducers were asked whether drinking less has reduced how often they go out socially.
- **Age groups and rankings:** Gen Z = 18–29, Millennials = 30–45, and older adults = 46–80. The separate 18–34 analysis includes both Gen Z and younger Millennials and should not be described as Gen Z. Where respondents were asked for their top three priorities or factors, the percentages show the share selecting an item in their top three.

Definitions:

- **Bar visitor:** Anyone who reports visiting bars/pubs at least occasionally, from weekly or more often through to less often.
- **Non-goer:** Anyone who answers “Never” when asked how often they visit bars/pubs.
- **Frequent visitor:** Anyone visiting bars/pubs weekly or more often or 2–3 times a month.
- **Occasional / infrequent visitor:** Anyone visiting about once a month, every few months, or less often.
- **Gen Z:** Respondents aged 18–29.
- **Millennials:** Respondents aged 30–45.
- **Older adults:** Respondents aged 46–80, combining Gen X and Baby Boomers.
- **Young adults / 18–34:** A separate analytical group covering

Fieldwork dates:

Fieldwork took place in 2026 between 1 and 14 July, with country-specific timings as follows: Austria (6–13 July), Belgium (2–13 July), Spain (2–14 July), Greece (2–13 July), Ireland (1–13 July), Italy (2–10 July), the Netherlands (2–9 July), Poland (2–10 July), and the UK (1–13 July).

Caveat: Results are reported following vendor quality review on national representativeness. Country findings use the relevant respondent base for each question, so routed questions have smaller samples than the total country sample. Combined nine-market findings represent an aggregate view of the markets included and should not be read as a population-weighted estimate of Europe. Statistical significance testing was not supplied, so small differences should be interpreted cautiously.

Secondary Research Pillar	Source	Research Lens
Search Intent	Google Trends: Edelman analysis of bar-, hospitality- and occasion-related searches, 2015–2025	Revealed search behavior: what people actively look for when planning social occasions. Used directionally to test whether activities and rituals increasingly provide the reason to go out. Relative search interest only; not footfall, sales or demand.
Consumer Behavior	GWl Core, Europe, Q2 2025–Q1 2026	Audience profiling of interests, behaviors and lifestyles. Used to understand socially outgoing Gen Z and the participation-led interests that can anchor real-world occasions, including sport, gaming, board games and live entertainment.
Social / Video	Tubular Labs & Edelman nine-market social/video content analysis	Observed cultural expression: what venues and audiences choose to film and share. Used to identify recurring participation formats such as quizzes, match viewing, live music, karaoke, games, food, aperitivo, tardeo and community events.
Cultural Intelligence	Canvas8: cultural reports and signals, 2024–2026	Qualitative foresight on belonging, third places, intentional socializing, online-to-offline communities, serendipity, “raw” connection and structured social occasions. Used to explain why new social rituals may be emerging.
Digital Behaviour	Reuters Institute: Digital News Report 2026 (DNR 2026)	Context on platform-led information and discovery behavior. Used as background for increasingly digital/social/video-led discovery among younger audiences (not direct evidence of bar-going).
Macro Social Context	OECD: Social Connections and Loneliness in OECD Countries (2025)	International context on loneliness, face-to-face contact, social support, living alone and social infrastructure. Used to frame why accessible physical spaces for connection can matter.
Heineken Intelligence	HEINEKEN Flavor & Ingredient Trends, 2026; HEINEKEN Media Narratives on Alcohol Consumption & Trends, 2025	Social listening and media-narrative intelligence. Used to track emerging social occasions and conversation themes (e.g. Quality Socializing, Lively Connecting) and how moderation / low-no is being framed in culture and industry coverage.
Attitudes & Foresight	Morning Consult, 2026; Foresight Factory, 2025	Supporting consumer-attitude and foresight signals on community, belonging and low/no cohorts. Used as contextual corroboration, not as the primary evidence base.

Canvas8 cultural intelligence: individual research titles used

- Why fandoms are gathering offline in search of connection: Fandom as a reason to gather and build belonging.
- How secular spiritual communities help tackle loneliness: New collective rituals, sober socials and community forms.
- Social apps connecting people IRL aim to fix loneliness: Digital tools as bridges to offline connection.
- Memorable connections: Participation and experiential belonging over passive consumption.
- Yearning to Connect: Niche spaces, supper clubs, book clubs and hobby-led gathering.
- Serendipitous encounters: Desire for less optimised, more spontaneous social interaction.
 - Raw connection: Value of human, imperfect interaction in an AI-shaped culture.
- How young people find communities in online third spaces: Online communities as gateways to IRL groups and activities.
- Gen Z yearn for belonging, not community from brands: Brands as enablers of people-to-people belonging.
- US Gen Zers view eateries as third spaces for new connections: Hospitality as a lower-pressure setting for meeting others.
- UK “link-ups” point to lack of teen-focused third spaces: Unmet demand for affordable, informal physical gathering space.
- You down to hang? The science of meaningful connection: Why focused face-to-face interaction can feel more meaningful.

Country-level corroborating sources

Austria : Brau Union Österreich / MARKET (Bierkulturbericht 2024/2025); Belgium : Edenred Belgium; YouGov / Via Belgium; Spain : Cerveceros de España; Greece : IWSR, reported by Kathimerini; Ireland : Drinks Industry Ireland; Italy : ISTAT; Netherlands : Trimbos Institute / CBS / RIVM; Poland : BMJ Open; UK : Portman Group / YouGov.

HOW TO READ THE STACK Search tells us what people look for; GWI profiles who they are and what they do; social/video intelligence shows what gets shared; Canvas8 explains emerging cultural behaviours; OECD and DNR provide wider societal and digital context; HEINEKEN intelligence and independent country sources corroborate moderation, community and occasion shifts. None of these replaces the survey; together they help explain the “why” behind changing bar-going behavior.