



HORECA BEVERAGE LANDSCAPE

Measuring how the Cost of Living Crisis
impacts Romanians' going out habits

Fifth Edition

A syndicated initiative
developed by Ipsos in Romania
September 2023

GAME CHANGERS



Welcome!

A lot can be said about the HoReCa industry in Romania, but not that it stagnates. Every year, new trends emerge and other either fade or become stronger.

Although it continues to place great importance on preserving and promoting the traditional Romanian cuisine - popular and widely available - this area also shows a rise of locally sourced and organic ingredients, appreciated by both consumers and chefs alike.

2023 witnesses the development of urban dining scenes, mainly in major cities. These cities offer a variety of restaurants catering to different culinary preferences, including international cuisines and fusion concepts.

On the beverage side, since Romania has a rich history of winemaking and in recent years there has been a growing interest in wine tourism, several vineyards and wineries have opened their doors to visitors, providing wine tastings and wine-related experiences.

Online food delivery platforms continue to enjoy high popularity among Romanian consumers. Consumers enjoy the convenience of ordering food from their favorite restaurants and having it delivered to their doorstep. Also, the HoReCa industry in Romania has been gradually adopting digital solutions for various processes such as online reservations, digital menus, and contactless payments. However, the pace of adoption may vary across establishments. As with any market, the HoReCa industry in Romania has seen closures and transformations of restaurants, particularly during challenging times such as economic downturns or the COVID-19 pandemic. Nevertheless, entrepreneurial spirit and innovation have led to the emergence of new dining concepts. The industry is constantly evolving and new trends may emerge in the future, based on changing consumer preferences and market dynamics.

As we look ahead to 2024, it is expected that these trends will continue to shape the landscape, driving innovation and pushing the boundaries of the industry.

Ipsos HoReCa trends report for Romania, reaching its 5th edition in 2023, is packed with insights on these trends and includes new chapters, keeping up with industry developments.

Have you got your copy yet?



Alina Stepan

Country Manager, Ipsos Romania
Cluster Head, Ipsos South-East Europe

An insightful overview of Going-out occasions for Beverages, with a focus on Food & Snacking



APPROACH

Online survey among 800 Romanian consumers who go out to HoReCa outlets, conducted on our panel.
30 minutes interview
Focus on recent occasions



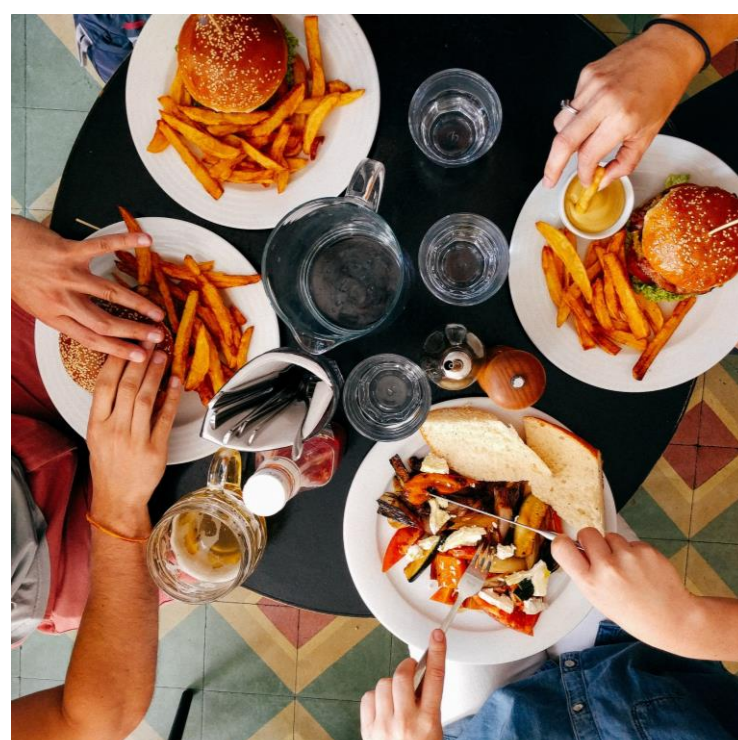
TARGET

Women and men living in urban areas of Romania.
18-55 y.o.
Going out to HoReCa outlets at least once a month.



LOCATIONS

Various types of outlets, ranging from restaurants, pubs, clubs, coffee shops to street food and fairs & events.



CATEGORIES

We focus on both Beverages (alcoholic & non-alcoholic) and Food & Snacking

What's on the 2023 menu?

STARTERS

Going out incidence & frequency

Customer profiling

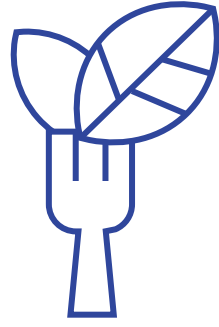
HoReCa locations

Focus on Bevs incidence & consumption

Category performance (funnel)

Consumption motivations*

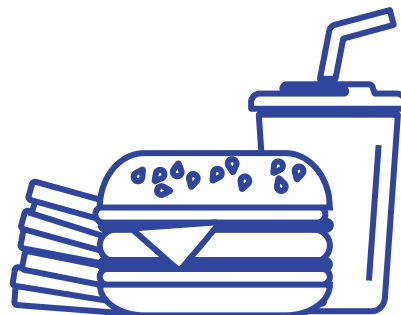
New! Dedicated section for Quick Service Restaurants & Food-courts



MAIN COURSE

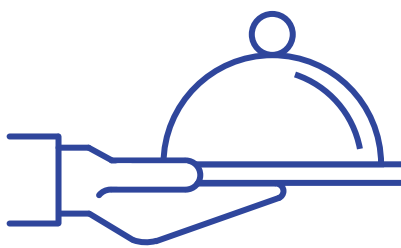
Occasion profiling: Who, When, Where, With whom, What (incl. Food/ Snacking), Why/ Why not?

Focus on Bevs inside the occasion
Volumetrics



CHEFS' SPECIAL

Zoom on manufacturers & brands across most recent occasion



PREPARATION (TENTATIVE)

Set-up & Seasoning: Sep 2023

Fieldwork & Cooking: Oct 2023

Dressing & Serving: Dec 2023



CHOOSE YOUR MENU

'Happy Hour' (Starters): from EUR 3,600

'Solid Lunch' (Starters + Main Course): from EUR 4,300

'Signature Dinner' (Starters + Main Course + Chef's Special): from EUR 4,900

*Spiced with our secret herbs in the Censydiam garden.

All dishes include PowerPoint report and live presentation of results.

Prices exclude VAT.

Ready to order? Meet the chefs



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ABOUT IPSOS

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Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

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In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder.

Ultimately, success comes down to a simple truth:

You act better when you are sure.

**BE
SURE.
ACT
SMARTER.**

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