



GERMAN ON PREMISE CONSUMER PULSE REPORT

CGA by NIQ, July 2023

A photograph of two cocktails on a wooden bar. The foreground cocktail is a tall glass filled with ice, a red liquid, and a strawberry garnish. The background cocktail is a shorter glass filled with an orange liquid and a lime garnish. The background is blurred, showing a bar setting with shelves and lights.

CGA'S MONTHLY CONSUMER PULSE

This monthly On Premise Consumer Pulse report is intended to be a fast-turnaround 'temperature check' of the channel and the consumers who visit bars and restaurants in Germany.

This study looks into their On Premise behaviour over the *past month* and tests visit intention for the *month ahead*.

In other countries, this monthly check-in has become a staple for beverage suppliers and other businesses interested in the channel.

These monthly updates will help interested parties to stay close to the consumer's intentions and behaviours for our beloved On Premise channel.

For this **July 2023** issue, we surveyed 1000 consumers (aged 18+) between 14th - 22nd July. These consumers were situated across all German regions and must typically visit On Premise venues at least once within a 3-month period.

This report touches on attitudes towards sustainability within On Premise visits.

SUMMARY: TOPLINE VISITATION & INTENTION

- Consumers have been highly engaged with the On Premise this month, driven primarily by food-led visits. The appeal of treat-led occasions and seasonal factors have also contributed to increased footfall in the past month, highlighting the importance in providing tailored experiences to consumer needs.
- However, it's important to note that a group of consumers have been visiting less frequently due to the impact of rising living costs and inflationary factors. These less engaged consumers contrast with the most engaged ones who have been visiting even more often than usual in July, balancing out the overall effects on visitation.
- Looking into the future, consumers will continue to enjoy the On Premise – even more so Gen Z consumers, who are expected to increase their visits in the coming month.
- In July, beer was the most consumed drink in the German On Premise, with a noticeable preference for German and local beers of average strength.



KEY METRICS / ON PREMISE VISITATION



VISITATION IN THE ON PREMISE OVER THE PAST MONTH

91%

Have been out to eat
in last month



46%

Have been out for drink
last month



3% haven't visited the on
premise *this month*



VISITATION PLANS FOR THE ON PREMISE MONTH AHEAD

90%

Plan to go out to eat in
next month



51%

Plan to go out for a
drink next month



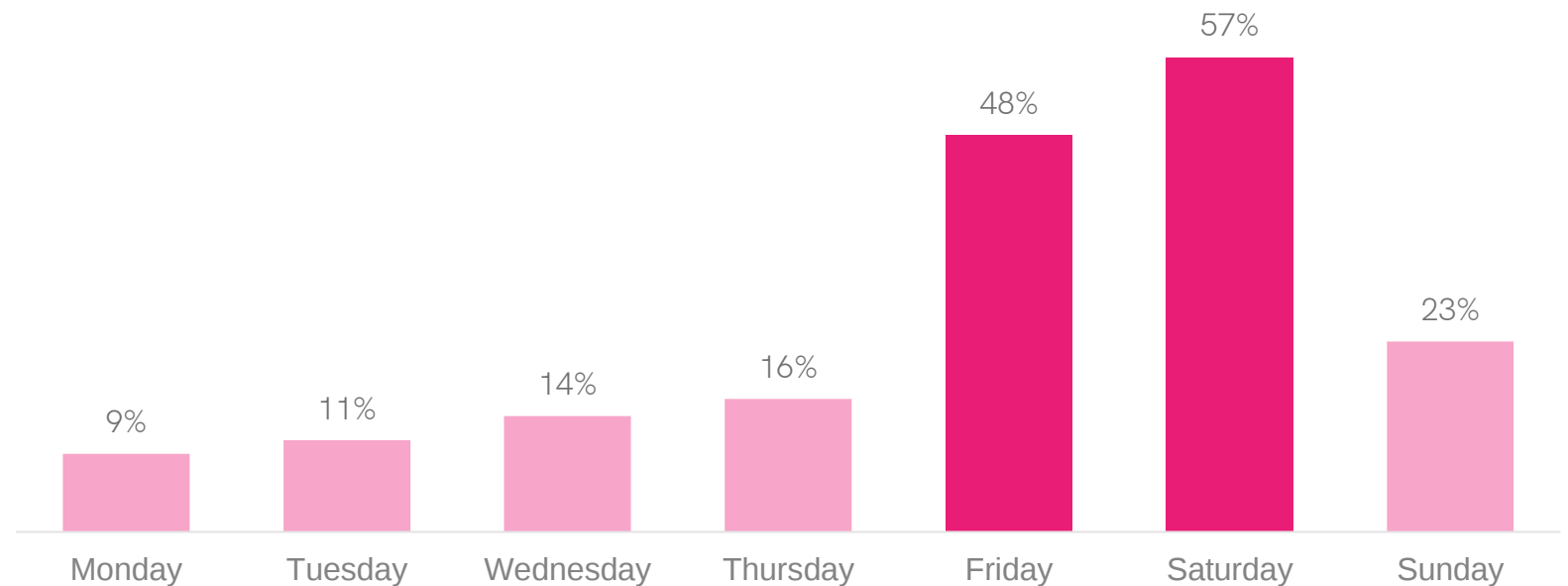
5% don't plan to visit the on
premise *next month*





ON WHICH DAY(S) OF THE WEEK HAVE YOU VISITED A BAR, RESTAURANT OR OTHER SIMILAR VENUE OVER THE PAST MONTH?

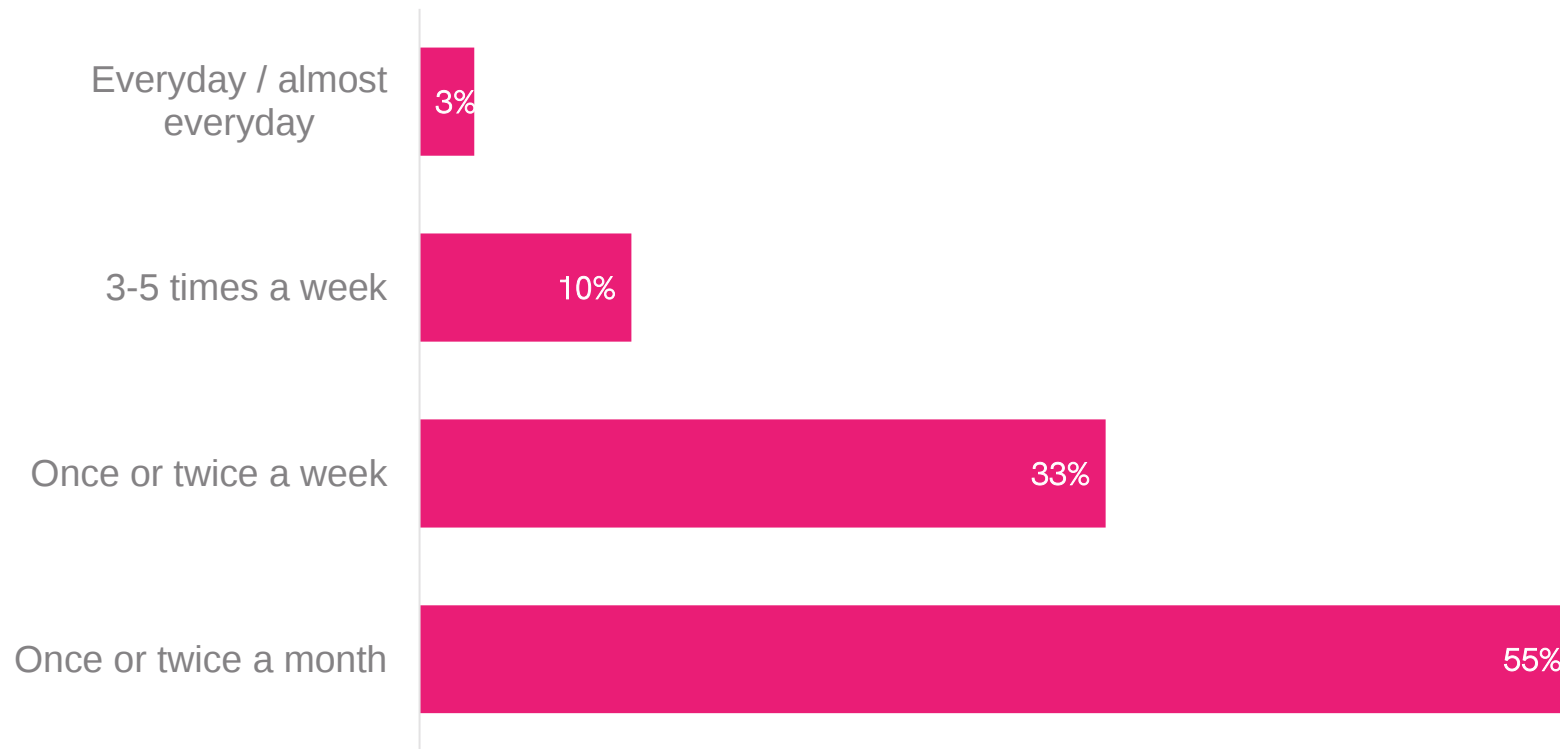
Days of the week visited



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JULY 2023 - SAMPLE: 966

HOW OFTEN HAVE YOU VISITED BARS, RESTAURANTS AND OTHER SIMILAR VENUES OVER THE PAST MONTH?

Visiting habits



HOW DOES YOUR CURRENT BEHAVIOUR COMPARE TO HOW FREQUENTLY YOU USUALLY GO OUT?

Change in frequency of visitation



19%

Going out more often



48%

Going out the same



33%

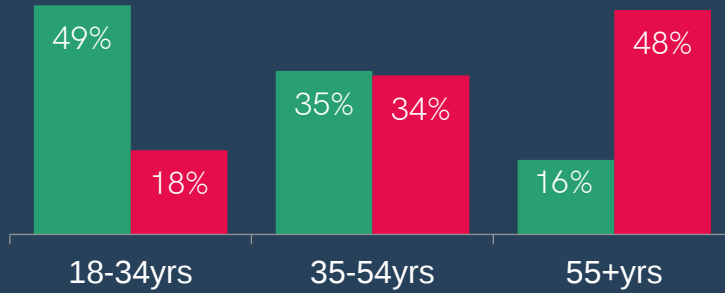
Going out less often



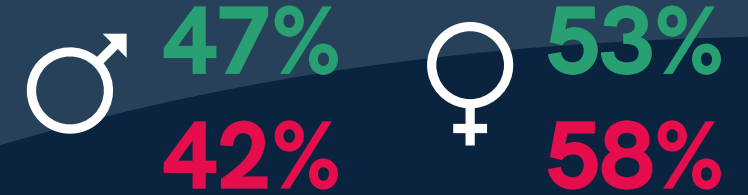
Those visiting the trade more often are a younger group typically residing in the city / town centre, visiting the sector far more frequently with a higher average household income

Going out more | Going out less

Age groups



Gender



Location of residence



70% **48%**

City centre / town centre

30% **52%**

Rural / suburban

Average household income

€44,453

€37,721

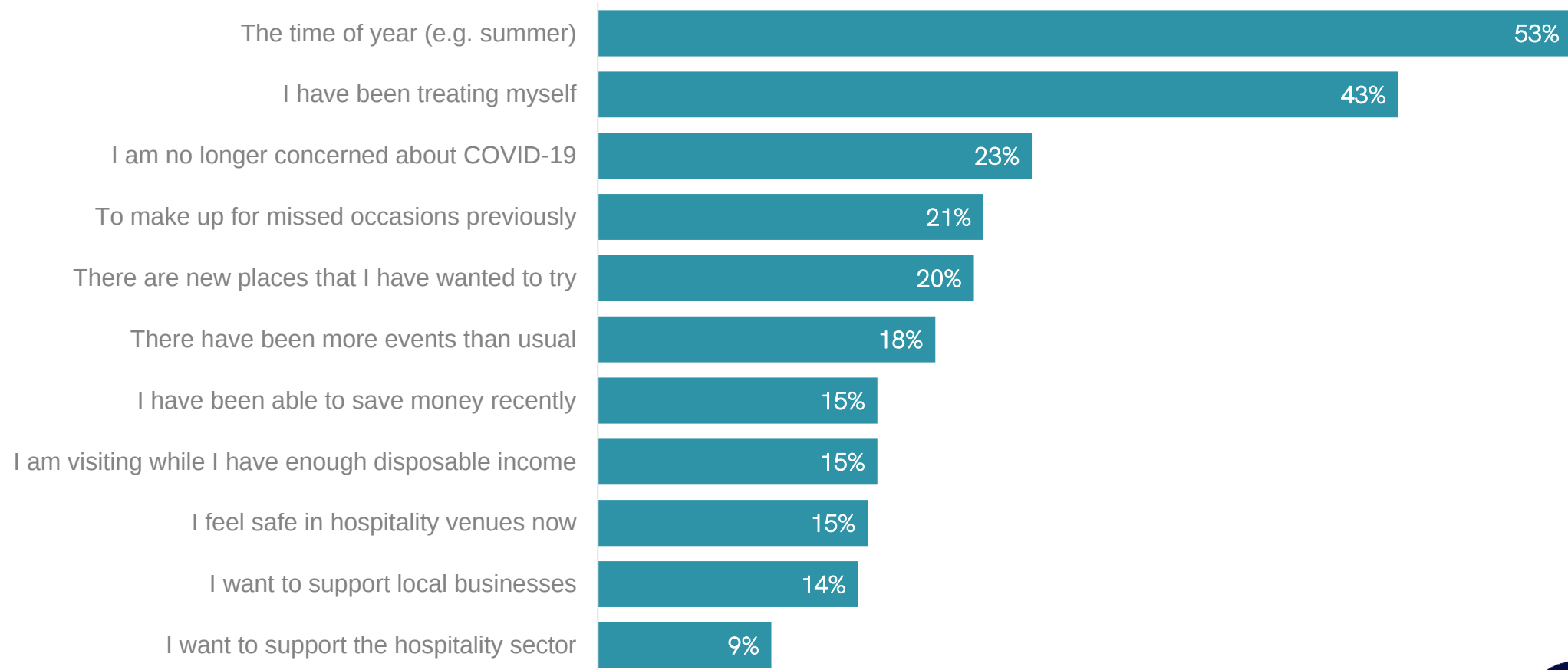
Typically visits the On-Premise...

At least weekly **79%** **21%**



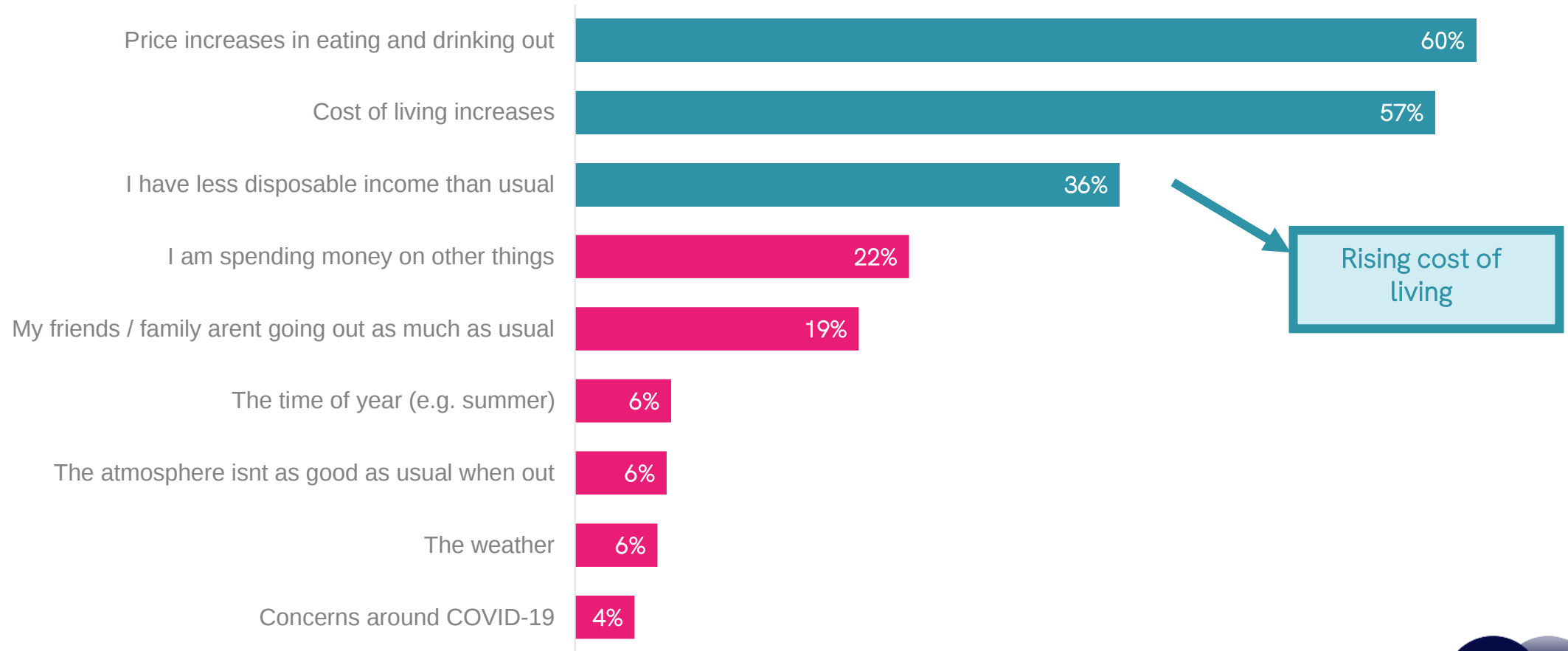
YOU HAVE SAID THAT YOU ARE CURRENTLY GOING OUT MORE FREQUENTLY THAN USUAL, WHY IS THIS?

Reasons for going out to the on premise more frequently than usual



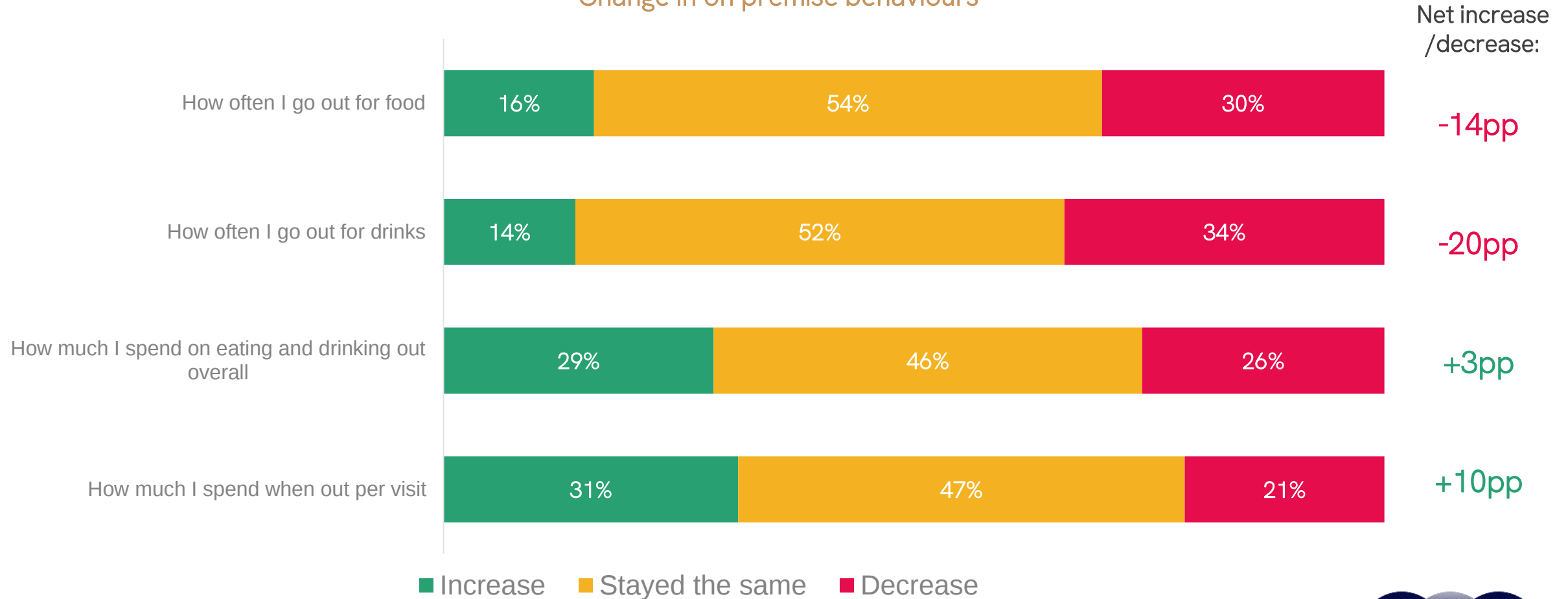
YOU SAID THAT YOU ARE CURRENTLY GOING OUT LESS FREQUENTLY THAN USUAL, WHY IS THIS?

Reasons for going out to the on premise less frequently than usual

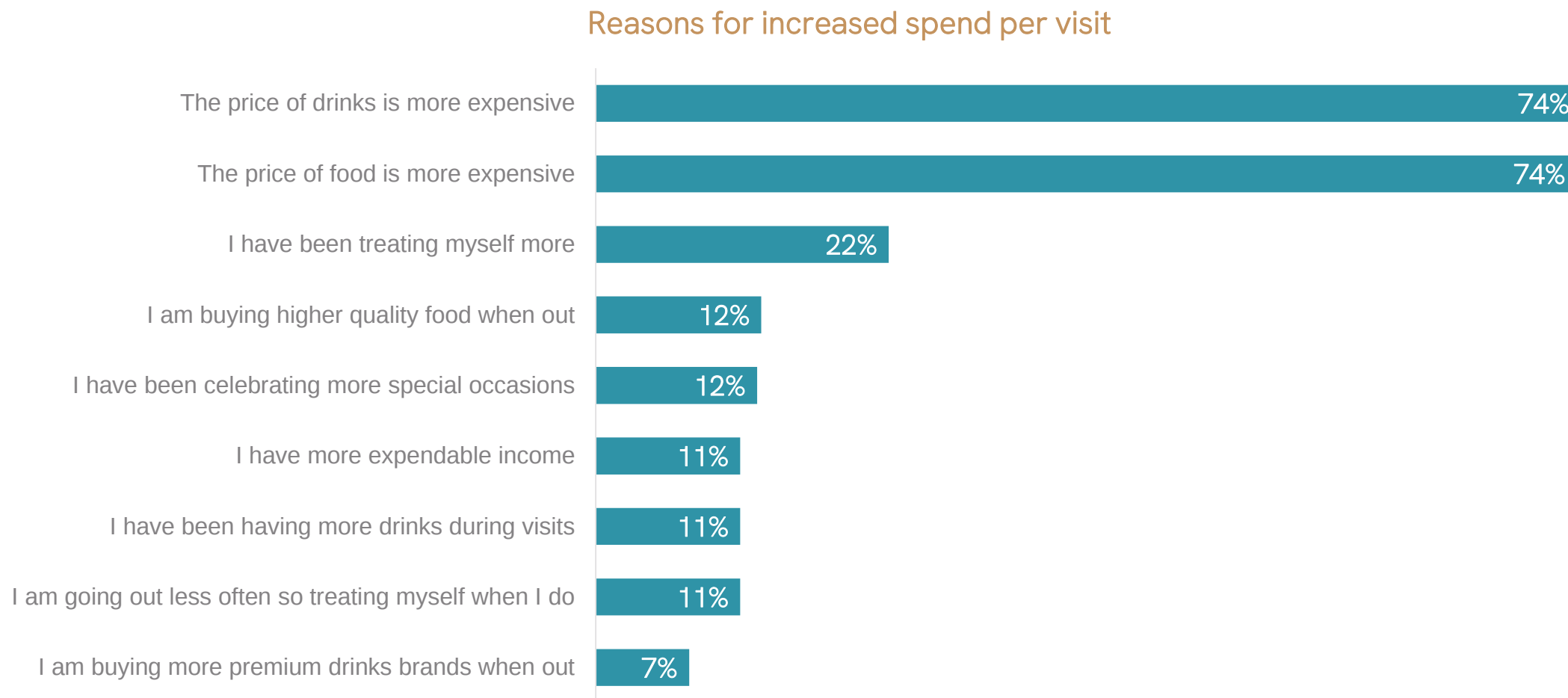


HAVE YOU CHANGED YOUR BEHAVIOUR IN ANY OF THE FOLLOWING WAYS OVER THE PAST MONTH, COMPARED TO USUAL, IN BARS, RESTAURANTS AND SIMILAR VENUES?

Change in on premise behaviours

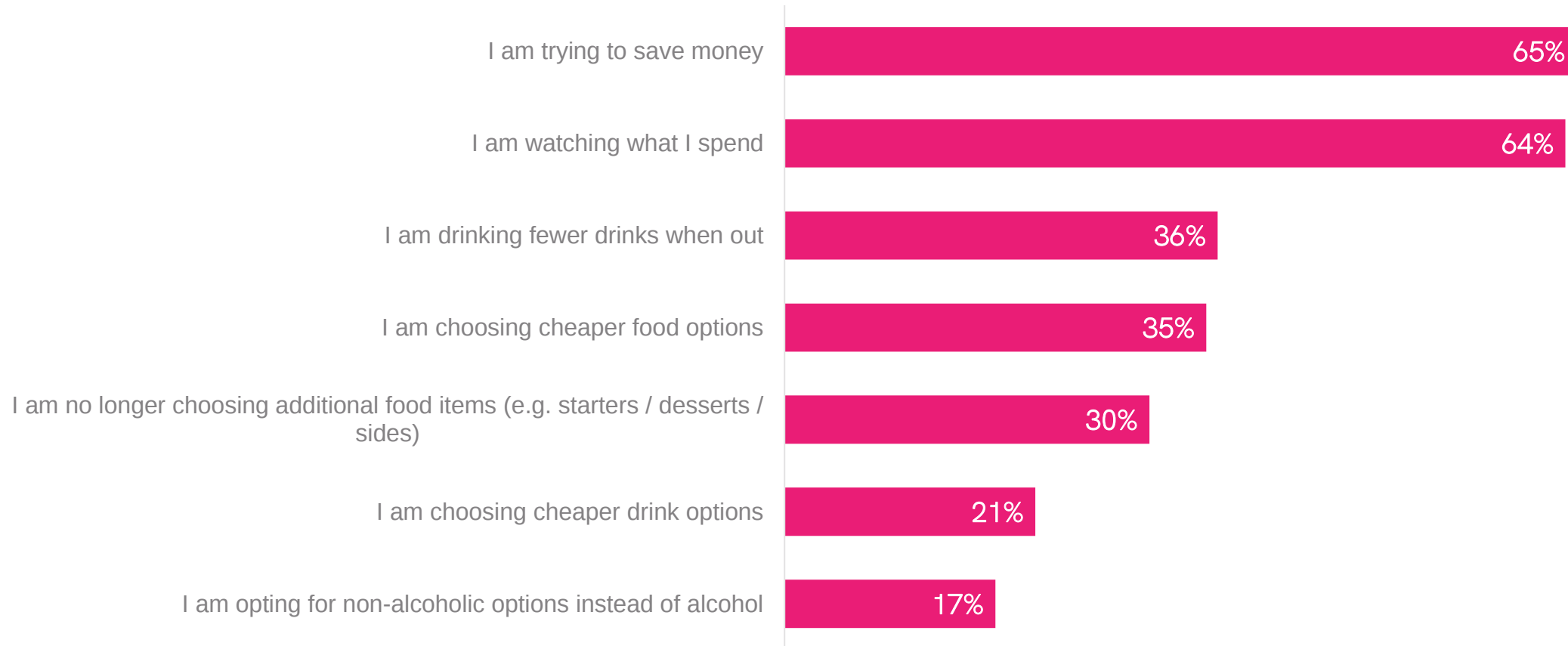


WHICH IF ANY OF THE FOLLOWING ARE REASONS WHY YOU ARE SPENDING MORE NOW WHEN OUT PER VISIT IN BARS, RESTAURANTS AND SIMILAR VENUES?



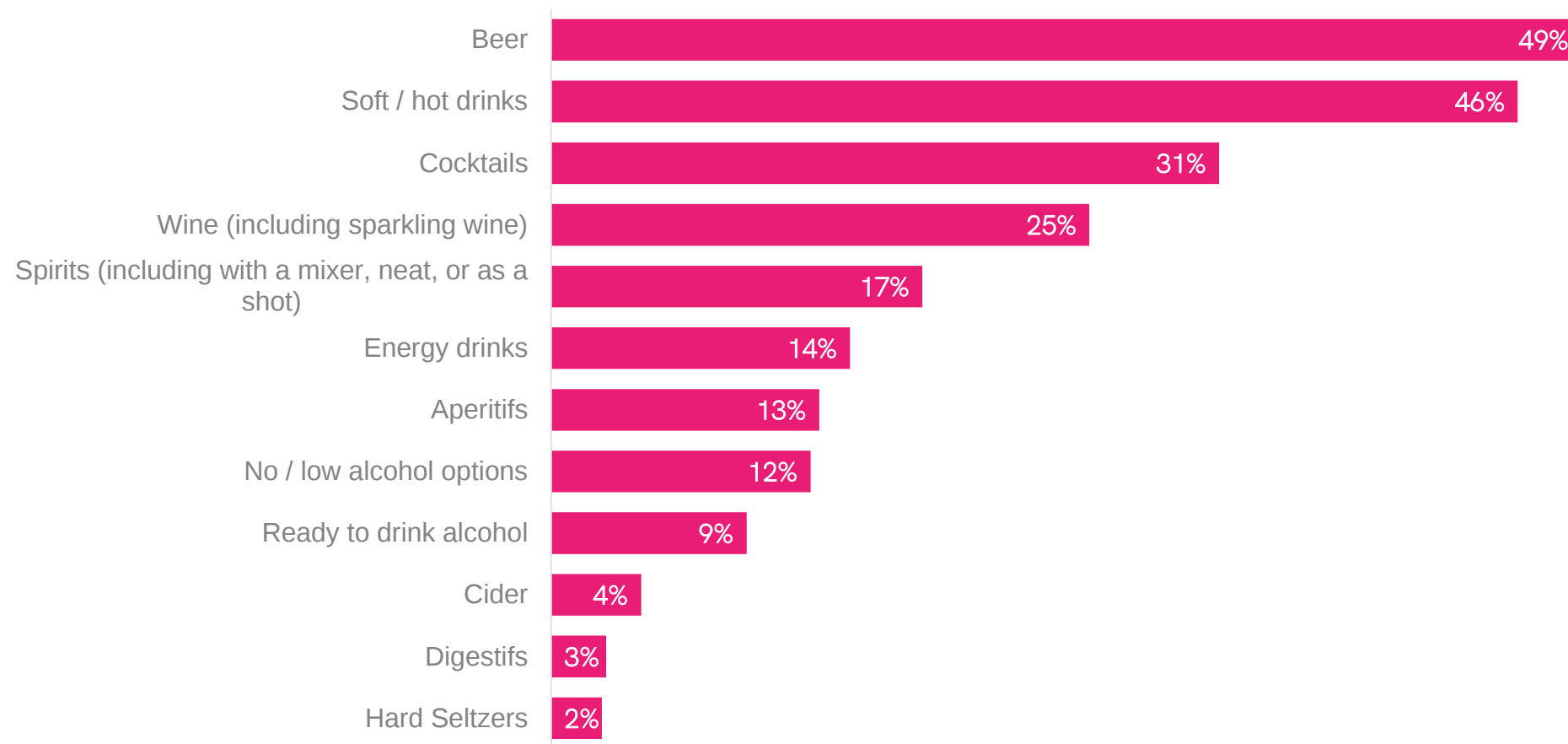
WHICH IF ANY OF THE FOLLOWING ARE REASONS WHY YOU ARE SPENDING LESS NOW WHEN OUT PER VISIT IN BARS, RESTAURANTS AND OTHER SIMILAR VENUES?

Reasons for decreased spend per visit



WHICH OF THE FOLLOWING HAVE YOU HAD IN BARS, RESTAURANTS AND SIMILAR VENUES IN THE PAST MONTH?

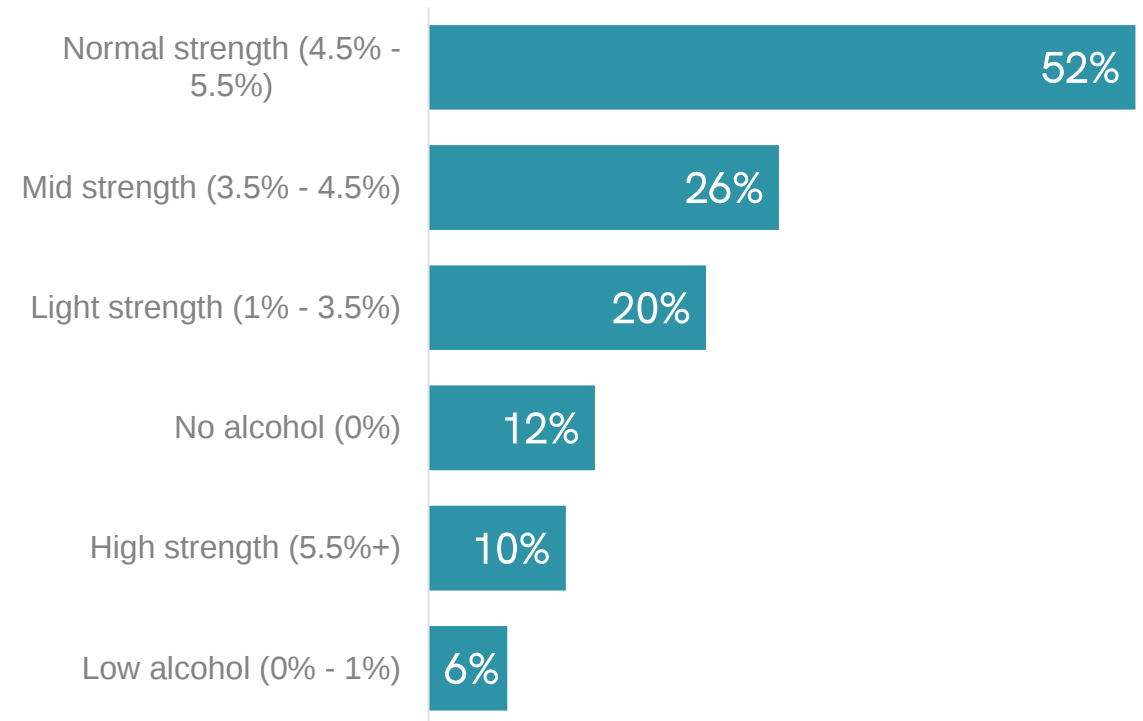
Drink choice of those who have visited the on premise in the past month | Top 10





WHICH STRENGTH OF BEER HAVE YOU HAD IN BARS, RESTAURANTS AND SIMILAR VENUES IN THE PAST MONTH? PLEASE SELECT ALL THAT APPLY

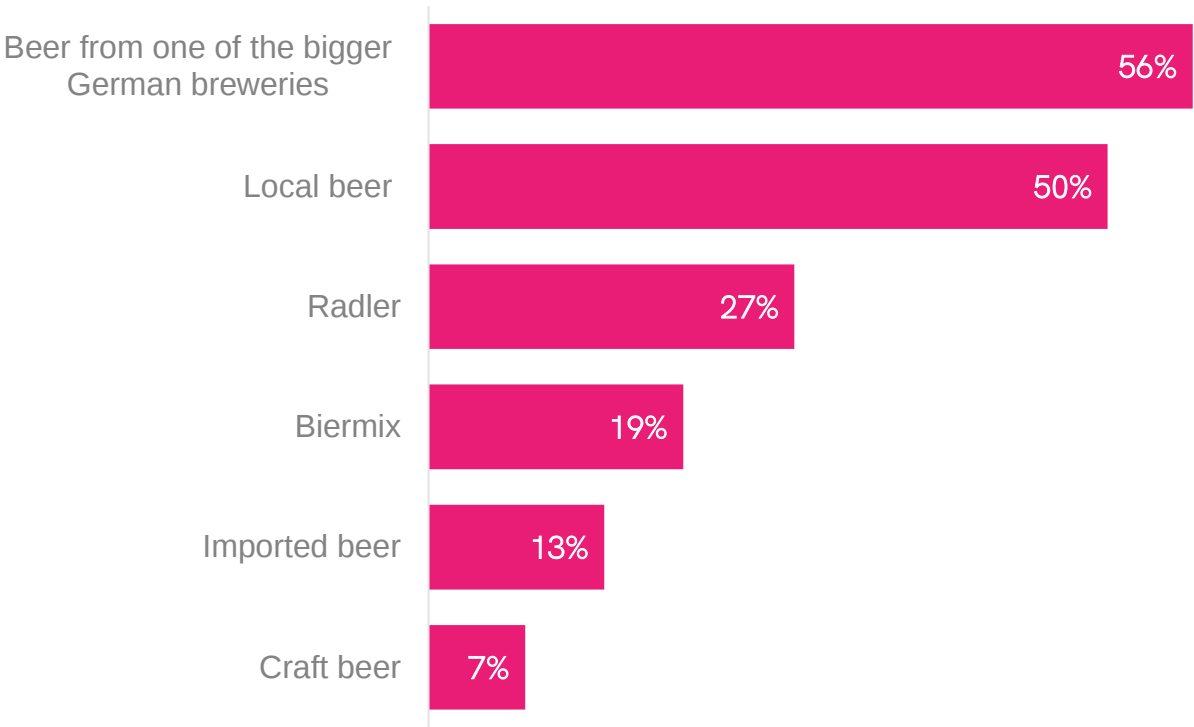
Strengths of beer consumers have drunk in the past month





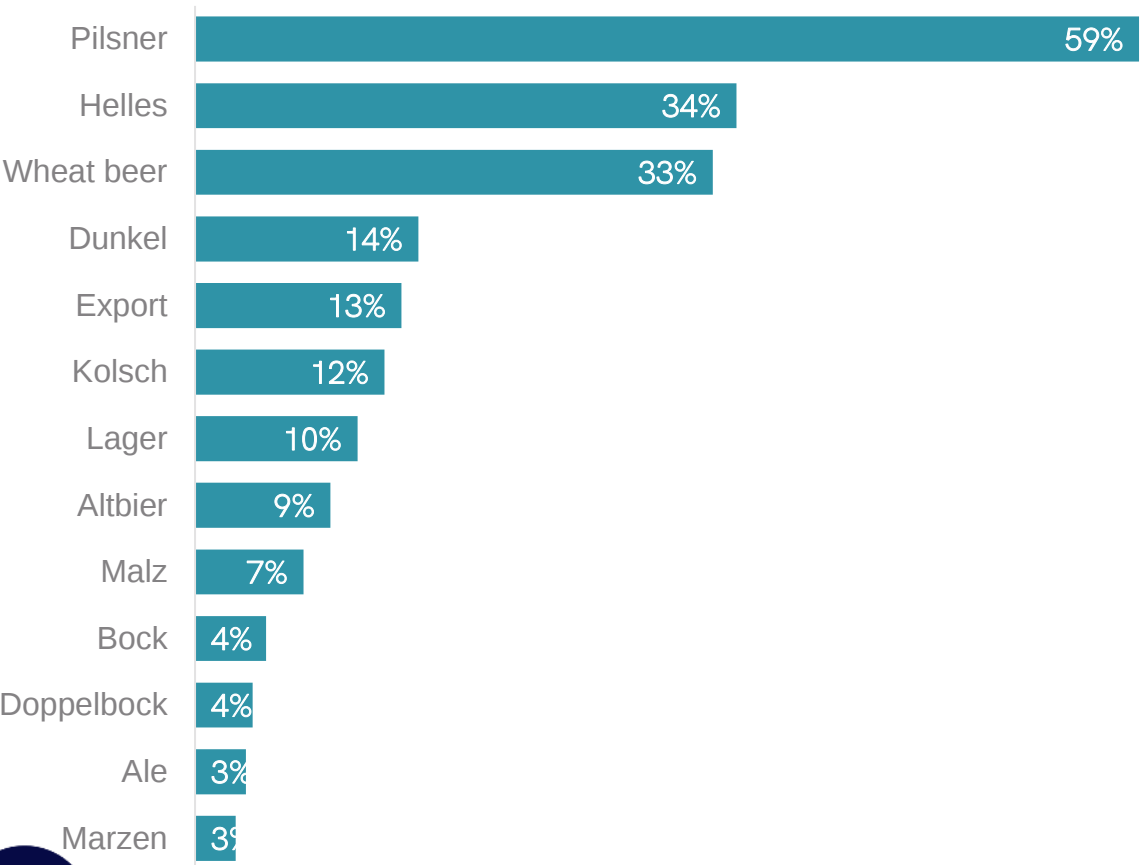
WHICH OF THE FOLLOWING BEER
TYPES HAVE YOU HAD IN BARS,
RESTAURANTS AND SIMILAR VENUES IN
THE PAST MONTH?

Types of beer consumers have had in the past
month



WHICH OF THE FOLLOWING TYPES OF BEER HAVE YOU DRUNK IN THE PAST MONTH?

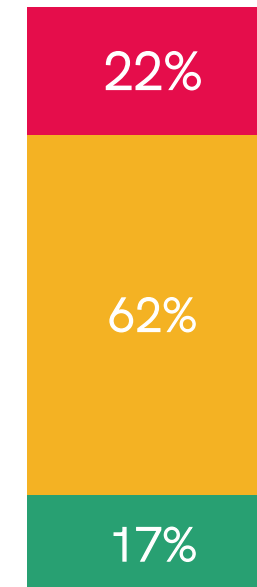
Types of beers consumers have drunk in the past month



HOW OFTEN DO YOU PLAN TO VISIT BARS, RESTAURANTS OR OTHER SIMILAR VENUES OVER THE NEXT MONTH?

Frequency of planning to visit bars, restaurants or other similar venues over the next month

- Less frequently
- As frequently
- More frequently



+16pp for Gen Z





HOT TOPICS – Holidays

- There is a huge opportunity in Germany for domestic holidays, with more consumers planning to holiday in Germany over European or international destinations.
- The On Premise is a vital part of these holidays, with the majority of consumers going out to either eat or drink most days. This ranks top in activities consumers plan to enjoy whilst on holiday
- Experimentation is key here. Consumers like to try both new food and new drinks whilst on holiday, highlighting a great opportunity here
- Whilst eating and drinking out is amongst consumers priorities when on holiday, it is important to get the balance between value and quality right.

39%

Of German consumers
plan to go on domestic
holiday this year

38%

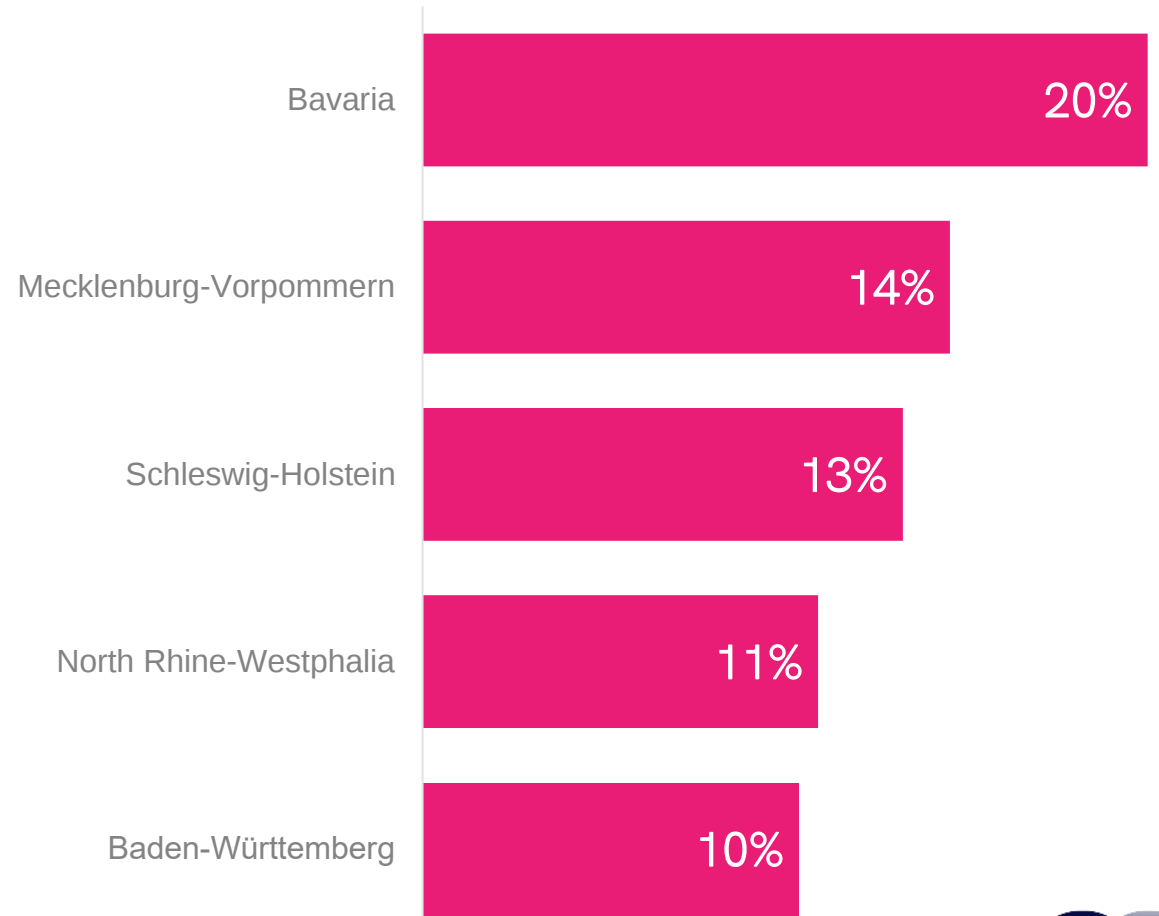
Of German consumers
plan to go Europe on
holiday this year



WHERE IN GERMANY ARE YOU PLANNING TO VISIT OVER SUMMER?



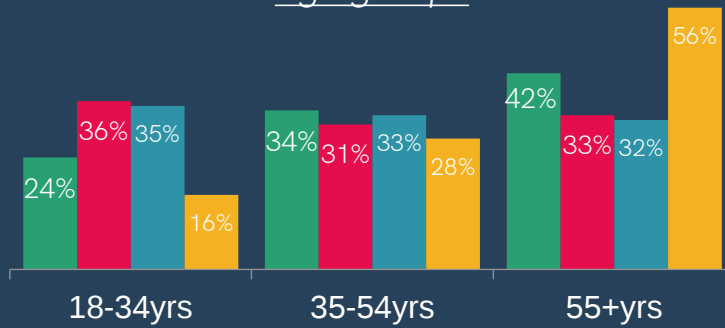
Places in Germany planning to visit this summer | Top 5



Those who are completing domestic holidays this summer are typically an older group with a smaller household income and spend in the on-premise than those going on holiday elsewhere

In Germany In Europe Outside of Europe Not going on holiday

Age groups



Gender



53%

49%

59%

44%



47%

51%

41%

56%

Average household income

€42.474

€53.493

€55.935

€32.938

Average spend eating / drinking
out on holiday

€173,78

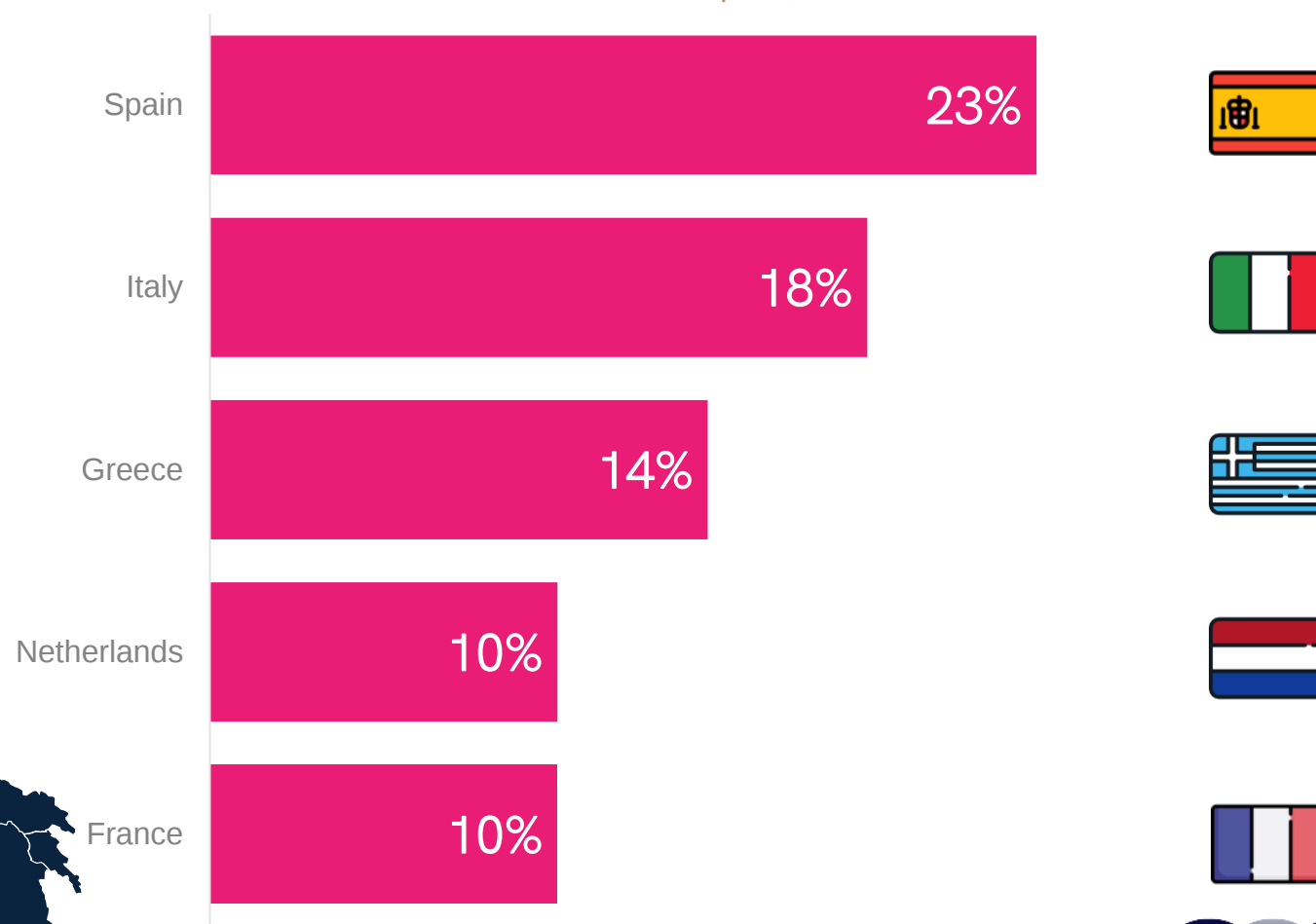
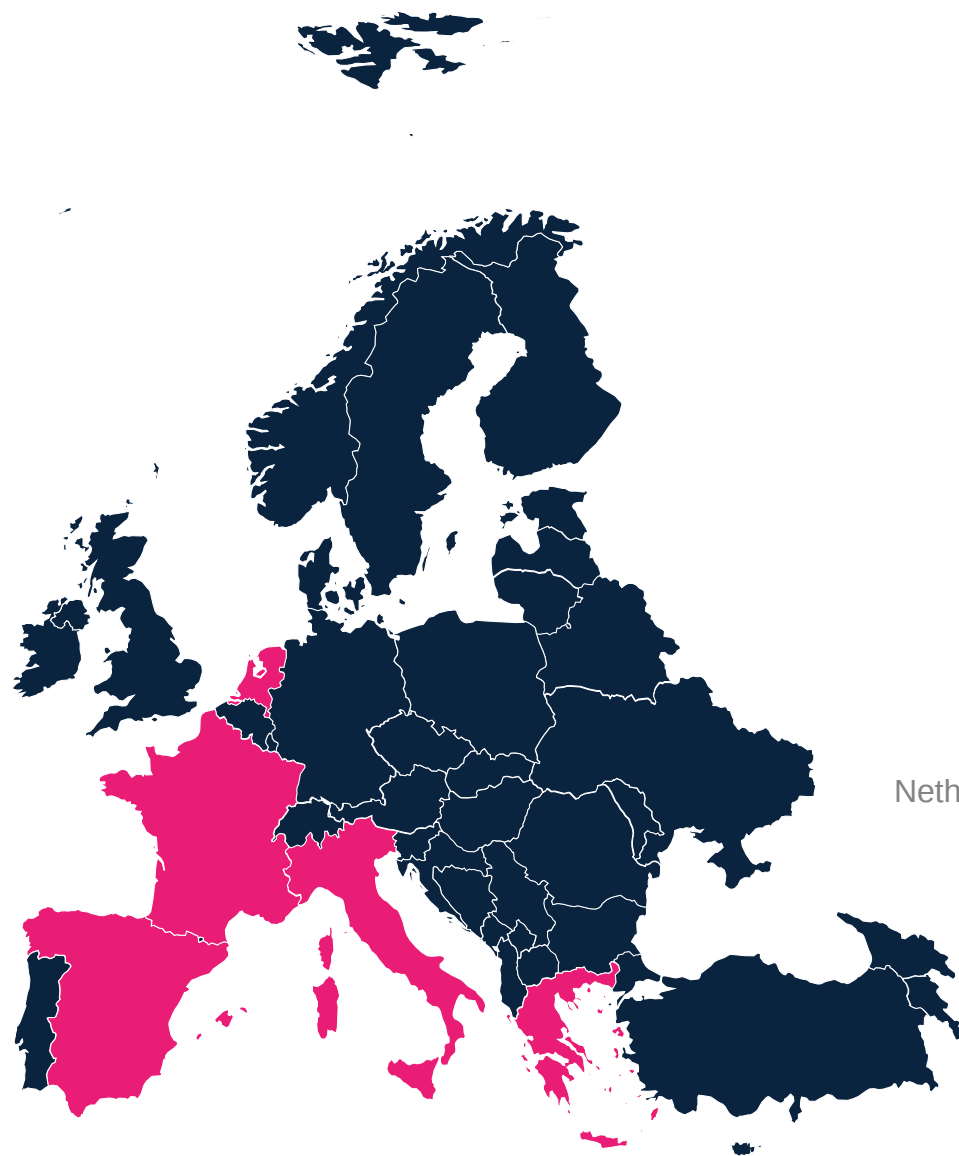
€195,54

€189,00



WHERE IN EUROPE ARE YOU PLANNING TO VISIT THIS SUMMER?

Countries in Europe Planning to visit this summer | Top 5

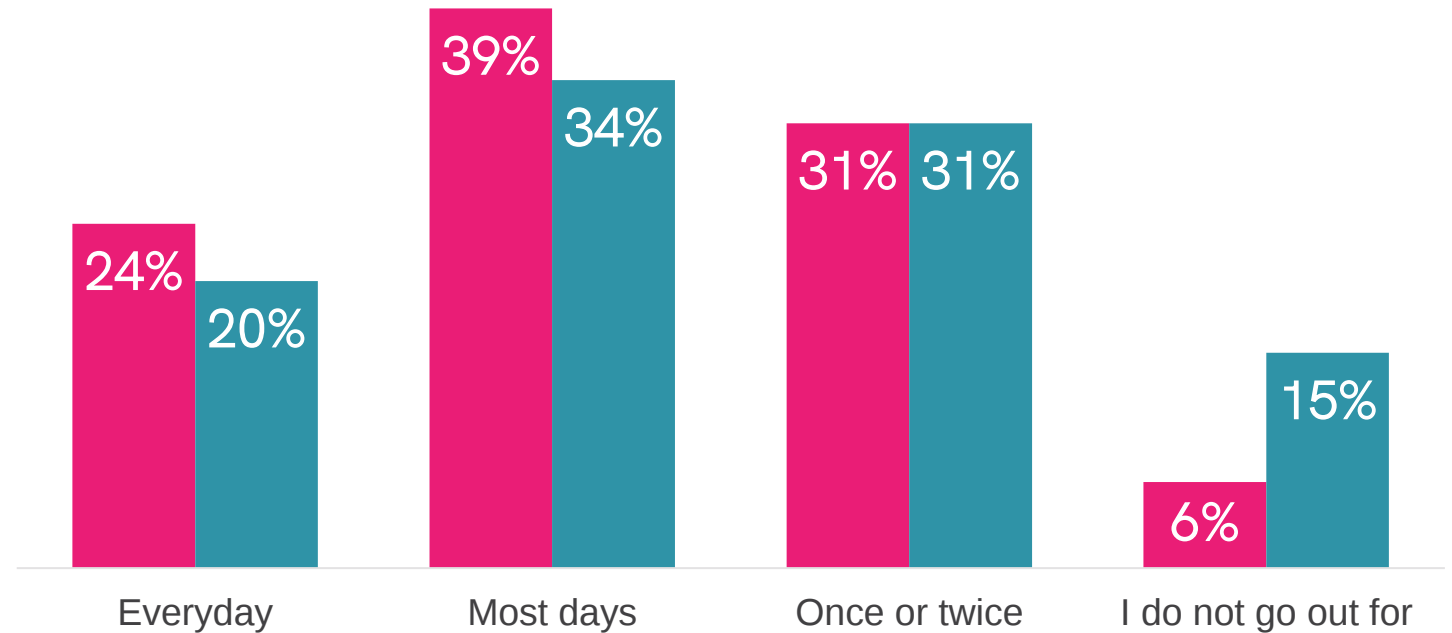




HOW OFTEN DO YOU TYPICALLY GO OUT TO EAT AND/OR DRINK WHILE YOU ARE ON HOLIDAYS

Eating and drinking on holidays

■ Go out to eat ■ Go out to drink





German consumers spend
on average

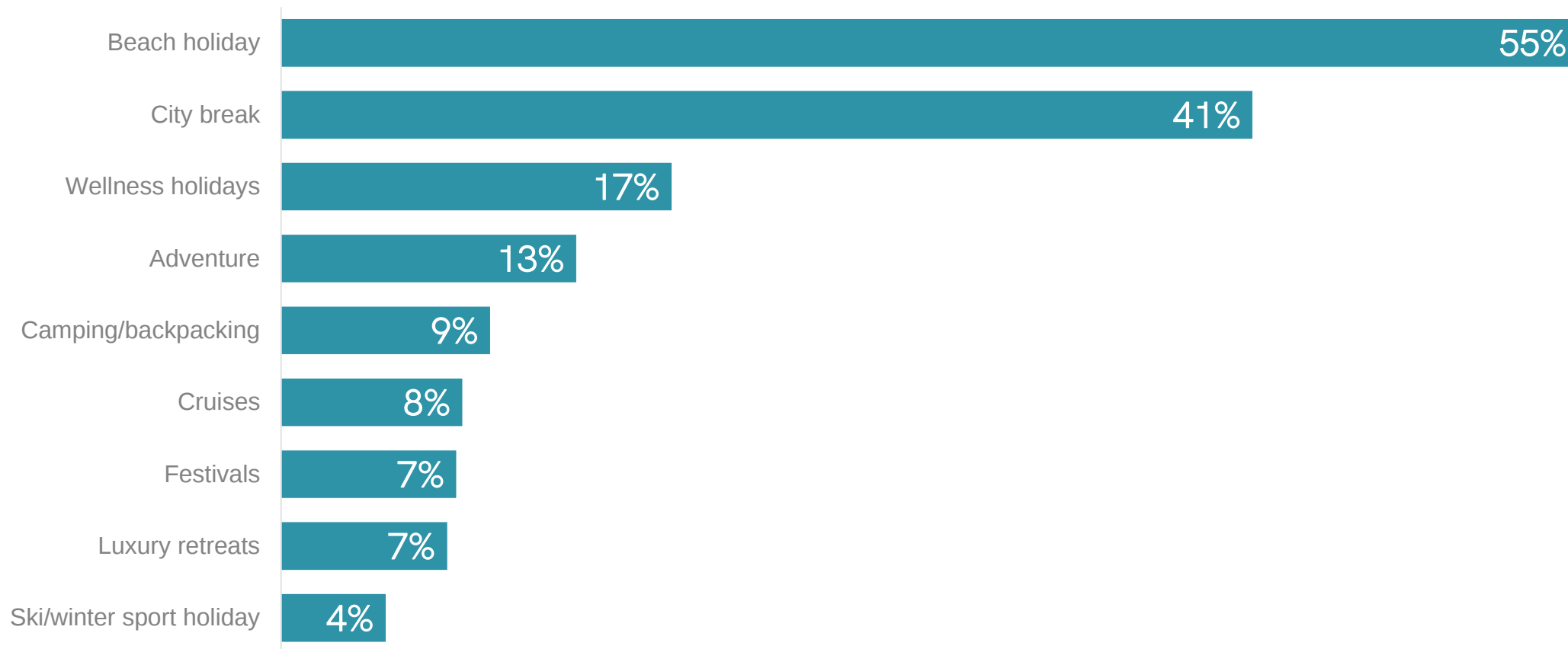
€170

on eating and drinking out
per week on holiday



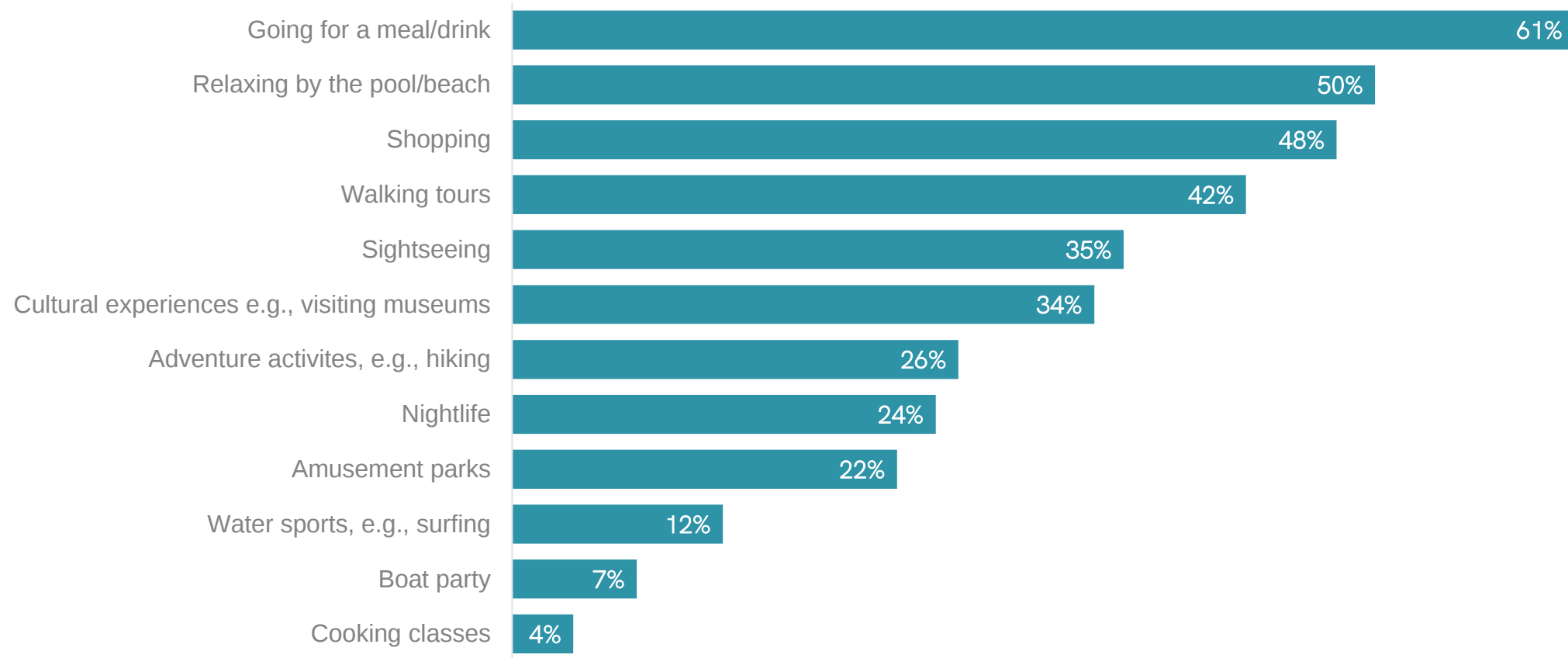
WHICH TYPE OF THE FOLLOWING HOLIDAYS DO YOU PLAN TO GO ON THIS YEAR?

Types of holidays consumers are planning to go this year



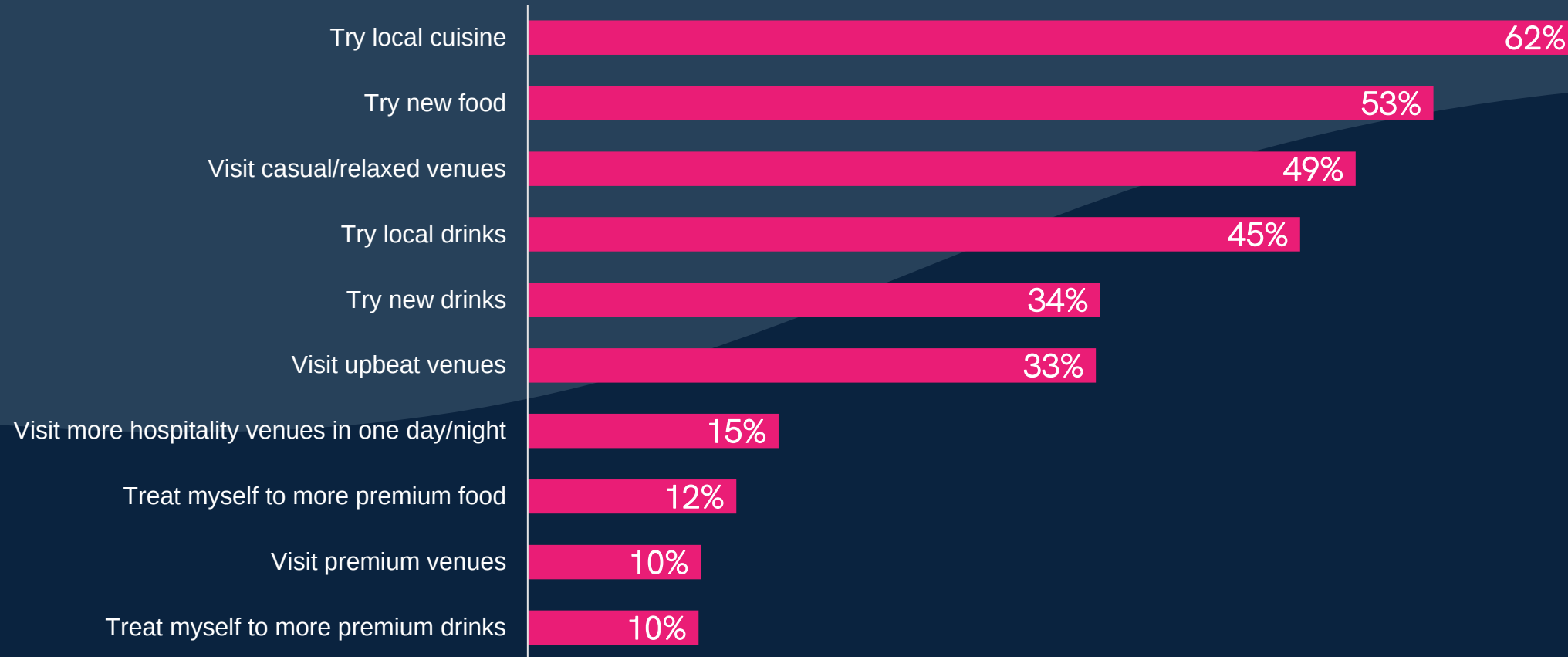
WHICH OF THE FOLLOWING ACTIVITIES DO YOU PLAN ON DOING WHILST ON YOU'RE HOLIDAY?

Types of activities consumers are planning to do on holiday



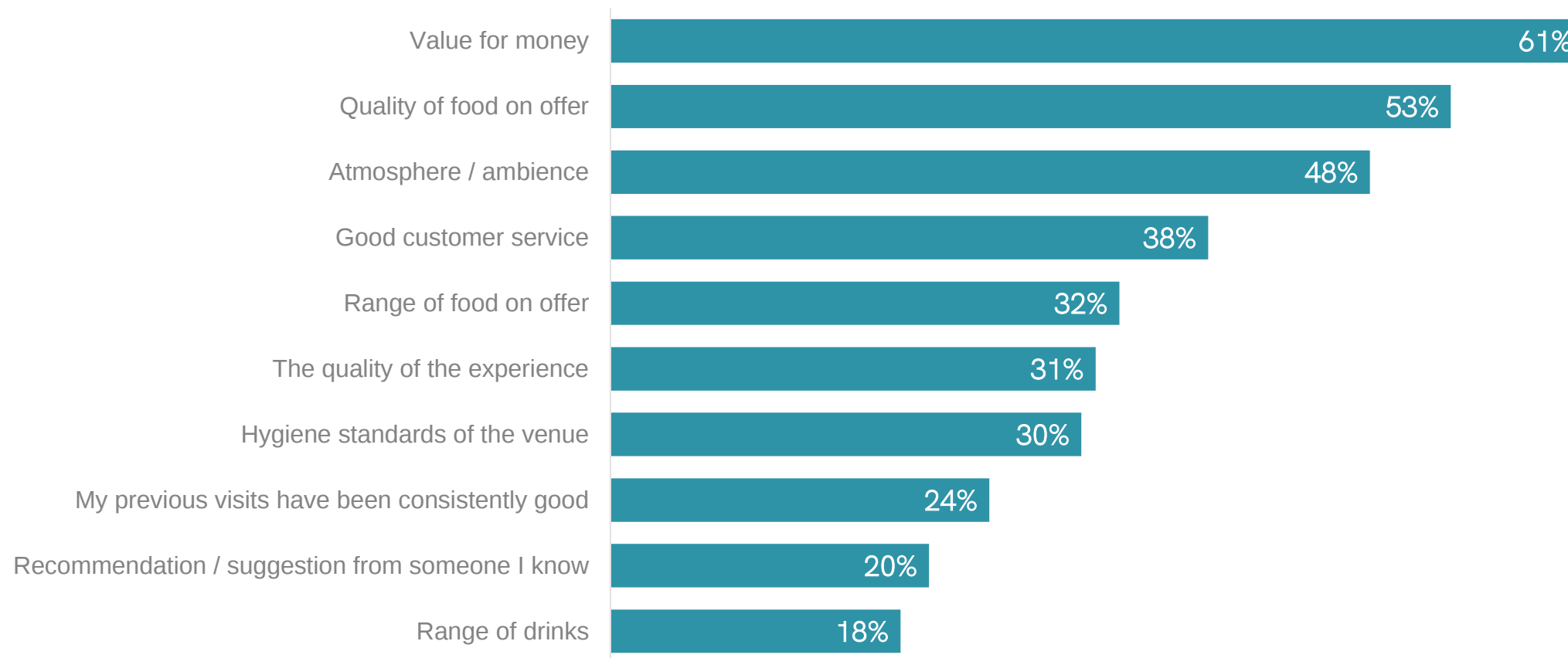
WHICH OF THE FOLLOWING, IF ANY, DO YOU TYPICALLY DO WHEN ON HOLIDAY?

Things consumers would typically do when on holiday



WHICH OF THE FOLLOWING FACTORS ARE MORE IMPORTANT WHEN CHOOSING WHERE TO EAT OR DRINK OUT ON HOLIDAY?

Important factors when choosing where to eat or drink out on holiday | Top 10





Want to know more about how global trends are currently impacting the German On Premise?



Want to know more about how global trends are currently impacting the German On Premise?



Global REACH Presentations

At CGA, May marks the release of our annual Global On Premise insights report – REACH.

Alongside the usual look at On Premise visitation, trending categories and venue choice factors, this year's report looks the topical issues affecting the industry such as sustainability, the cost of living crisis, social media and advocacy, education and others.

If you'd like to enquire about a presentation for you and your team, please get in touch via the contact information on the next slide.



Regional REACH reports

Following on from our annual Global REACH report will be our regional REACH reports aiming to explore more closely the nuances by market dependent on global location.

For the German On Premise this will be in the form of a dedicated Europe report.

Get in touch to discuss the available options.



OPUS Lite

If you'd like something a little closer to home, 2023 see's the launch of our OPUS Lite package, which provides market level insights on those trends impacting the On Premise globally.

Flexible options are available to suit your teams needs, whether that be through a ready made insight report or full access to the data set.

Get in touch to find out more.



Want to know more about the German On Premise?



OPUS Select

If you'd like to investigate a more specific topic more tailored to you and your business, 2023 sees the launch of the OPUS Select package. This provides market level insights focussing on specific topics from...

- Channel/ Occasion deep dive
 - Category overview
 - Hot topic
- Custom Business Case
- Demographic deep dive
 - And more!

Get in touch to find out more.

OPUS Core

OPUS Core subscription allows you to delve into the details of consumer behaviour in the On Premise, from granular detail about each channel, occasion and drink category, as well as identifying how key trends are impacting the industry.

Get in touch to find out more.



Contact Us

To learn more or to speak to a member of the team,
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