

A background image showing a group of people at a social gathering. In the foreground, several hands are holding up glasses filled with mojitos, garnished with lime slices and mint leaves. The people are smiling and looking towards the camera. The scene is set outdoors with greenery in the background.

GERMANY ON PREMISE CONSUMER PULSE REPORT

CGA by NIQ, November 2023

CGA
Powered by NIQ



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 consumer's 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 **November 2023** issue, we surveyed 1001 consumers (aged 18+) between 13th - 20th November. 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 upon hot topics including Christmas, Christmas markets, coffee and ready to drink alcohol.

SUMMARY: TOPLINE VISITATION & INTENTION

- On Premise visitation has fallen slightly compared to October, with visits for food remaining relatively stable and visits for drinks continuing the gradual decline we have seen in previous months.
- However, with the festive season approaching, consumers are planning to increase the number of visits for drinks and reduce the number of visits for food.
- Gen Z remain the demographic to target, visiting the On Premise much more than average this month, and planning to go out much more over December.
- The rising cost of living remains the primary driver of decreasing visitation and increased spend, although these factors have been less significant throughout this month compared to October.
- The time of year has also contributed to decreased visitation, with consumers opting to spend money on other things as the festive season approaches.
- Most consumers (90%), plan to visit the On Premise for either food or drink during the Christmas period, and with 42% planning to go on domestic holidays, hotels will be an important channel to focus on during December.
- 92% of consumers plan to visit Christmas Markets, with traditional Christmas drinks being the preferred option for consumers.
- 34% of consumers visit the on premise weekly for coffee, with visitation shifting to earlier times of the day compared to a year ago.
- Around half of all consumers drink RTDs with the majority drinking them in the On Premise.

A close-up photograph of a person's hands, wearing a grey suit jacket and a red striped tie, stirring a drink in a faceted crystal glass with a black straw. The drink is a light orange color with ice and a garnish. In the background, another person is also stirring a drink in a similar glass. The scene is set in a bar or restaurant with a dark countertop and various bar items visible.

KEY METRICS / ON PREMISE VISITATION



VISITATION IN THE ON PREMISE OVER THE PAST MONTH

Visits this month to the On Premise



Aug Sept Oct Nov

- Have been out to eat in the last month
- Have been out for a drink in the last month

96% visited the On Premise this month.
-1pp vs October

VISITATION PLANS FOR THE ON PREMISE MONTH AHEAD

88%

Plan to go out to eat
in the next month
-4pp vs October



48%

Plan to go out to drink
in the next month
+2pp vs October



LOOKING AHEAD



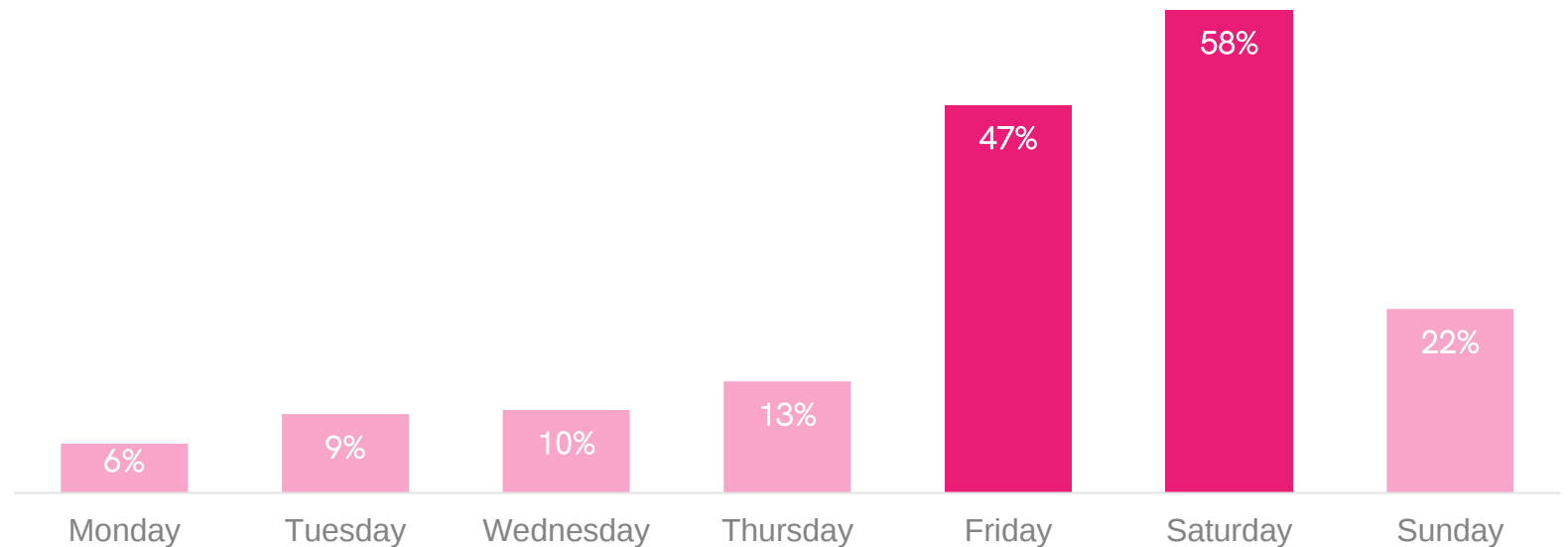
5% don't plan to visit the
on premise *next month*
+2pp vs October





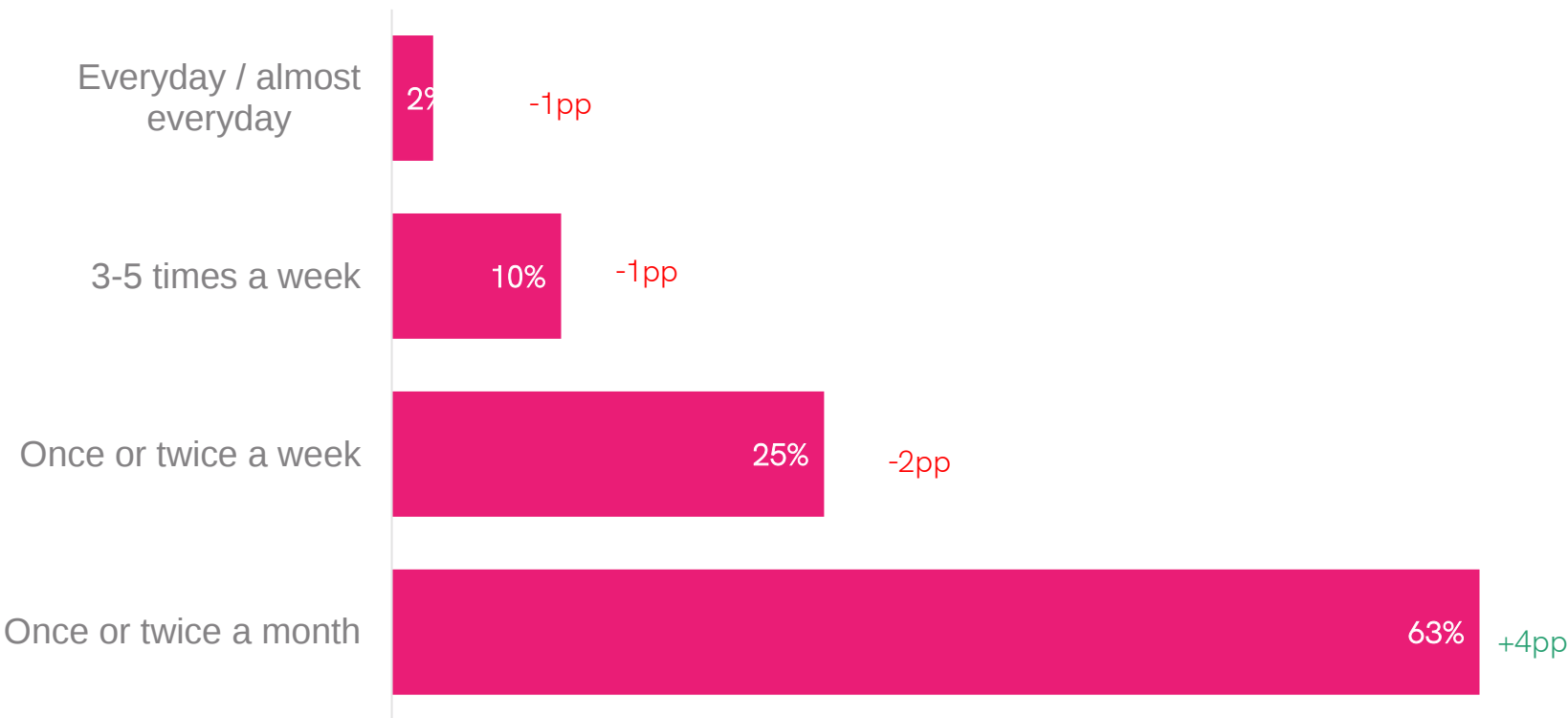
ON WHICH DAY(S) OF THE WEEK HAVE YOU VISITED A BAR, RESTAURANT OR OTHER SIMILAR VENUE OVER THE PAST MONTH?

Days of the week visited



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

Visiting habits (vs October)





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

Change in frequency of visitation



18%

Going out more
often

-1pp vs
October

42%

Going out the
same

-1pp vs October

40%

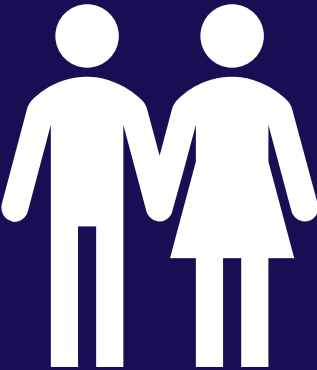
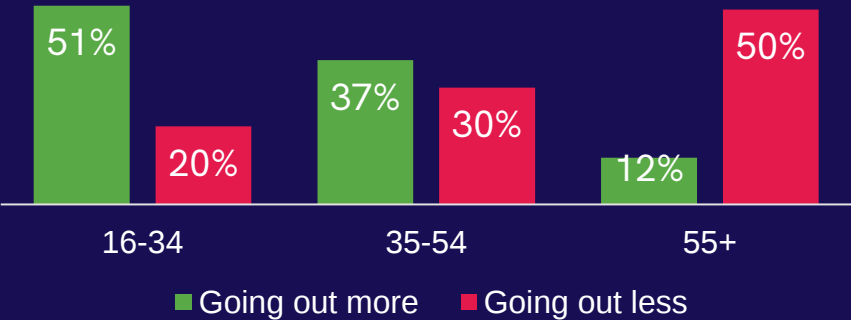
Going out less
often

+2pp vs
October

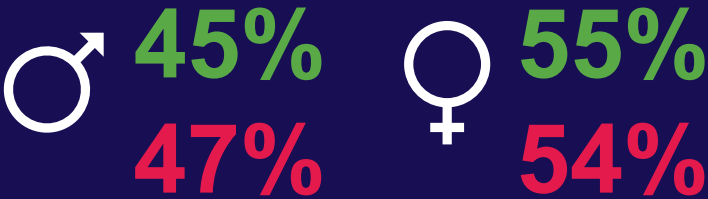
Those visiting the on premise more frequently than usual are typically younger, more likely to be located within the city / town centre and with a higher average household income than those who are visiting less often

Going out more | Going out less

Age groups



Gender



Location of residence



61% 43%

City centre / town centre

39% 57%

Rural / suburban

Average household income

€46,611

€40,761

Typically visits the On-Premise...

At least weekly 70% 17%

40%

Of Gen Z are going out
more often this month

+22pp vs average
consumer

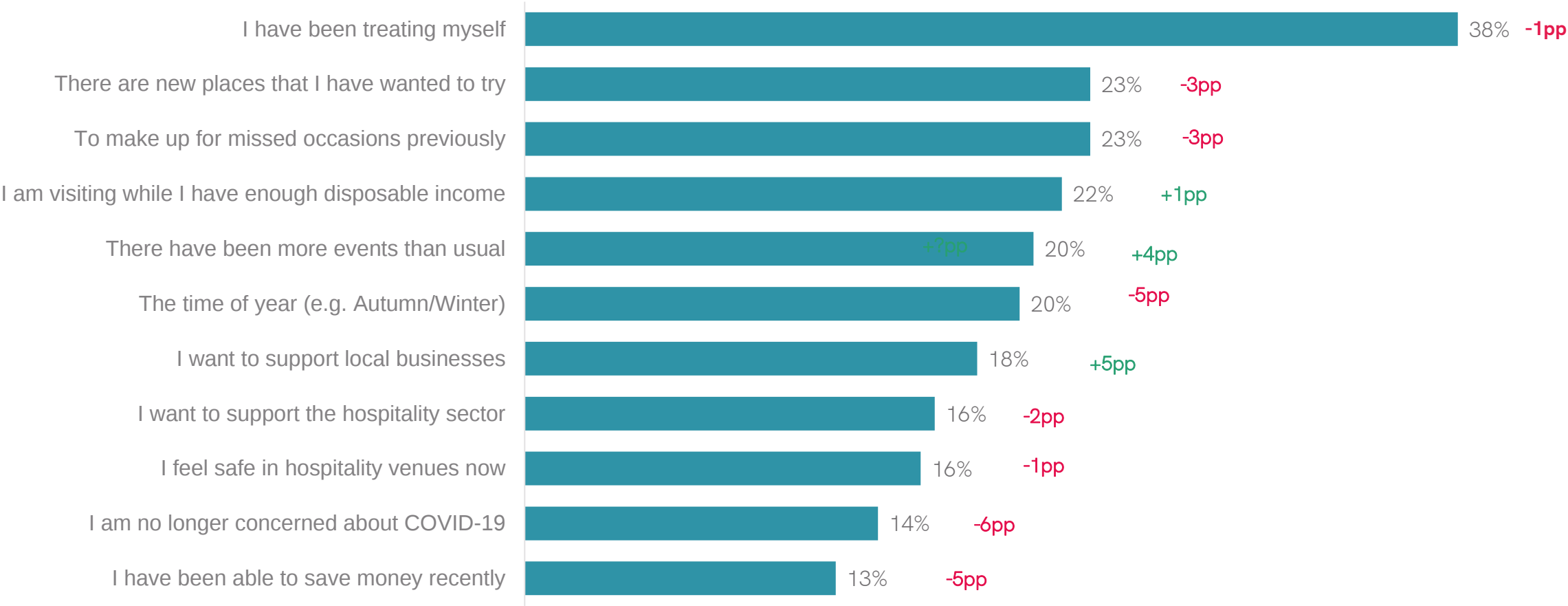
42%

Of Gen Z are spending
more overall on eating
and drinking out this
month

+16pp vs average
consumer

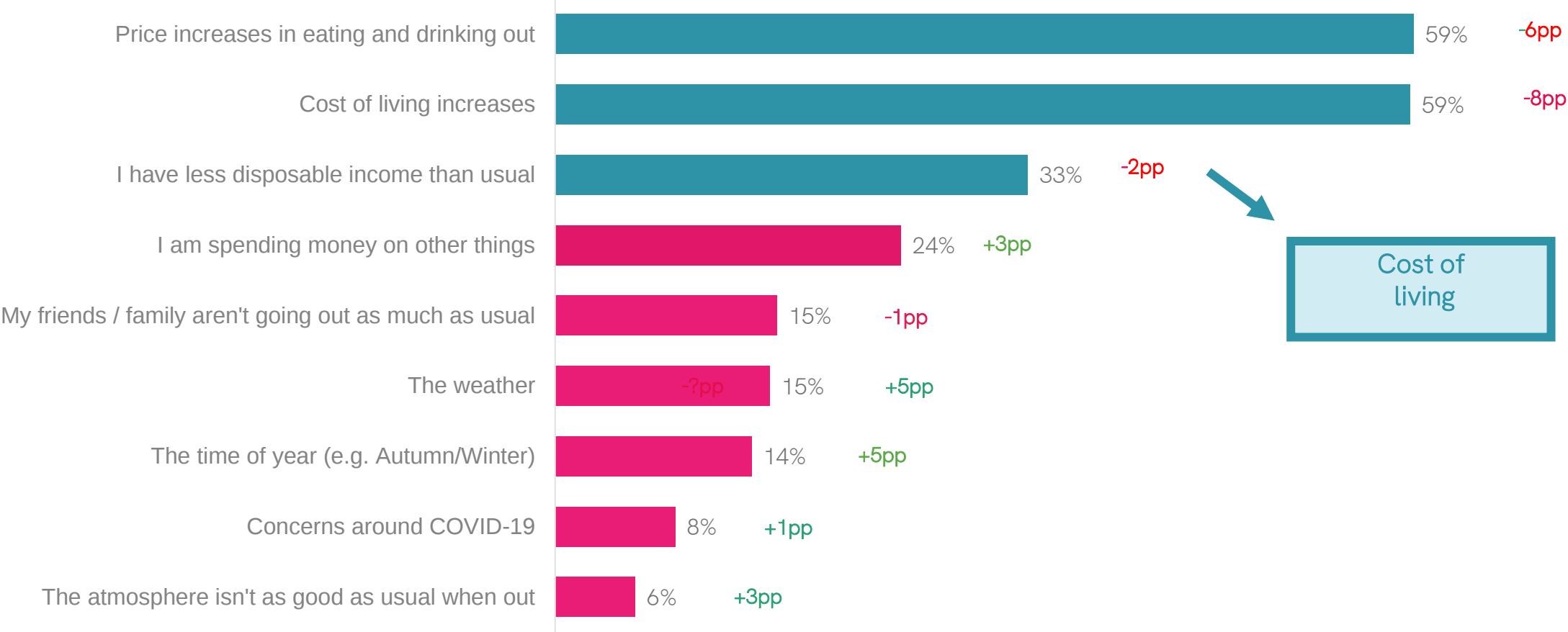
YOU HAVE SAID THAT YOU ARE CURRENTLY GOING OUT MORE FREQUENTLY THAN USUAL, WHY IS THIS?

Reasons for going out to the on premise more frequently than usual (vs October)



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 (vs October)

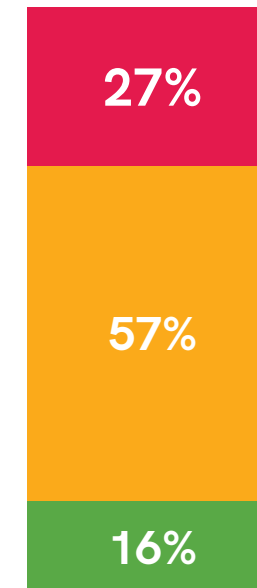




HOW OFTEN DO YOU PLAN TO VISIT BARS, RESTAURANTS OR OTHER SIMILAR VENUES OVER THE NEXT MONTH?

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

- Less frequently
- As frequently
- More frequently



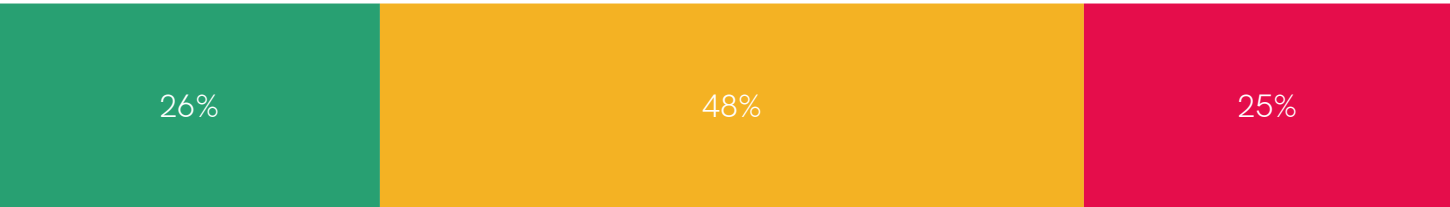
+21pp for Gen Z

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

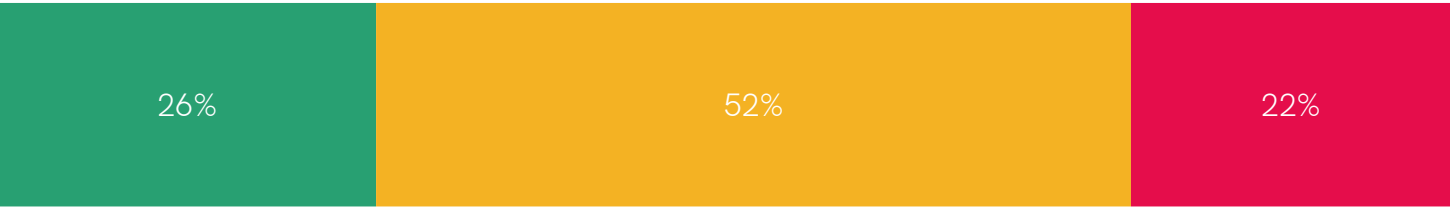
NET
Change

How much I spend on eating and drinking out overall



+1pp

How much I spend when out per visit

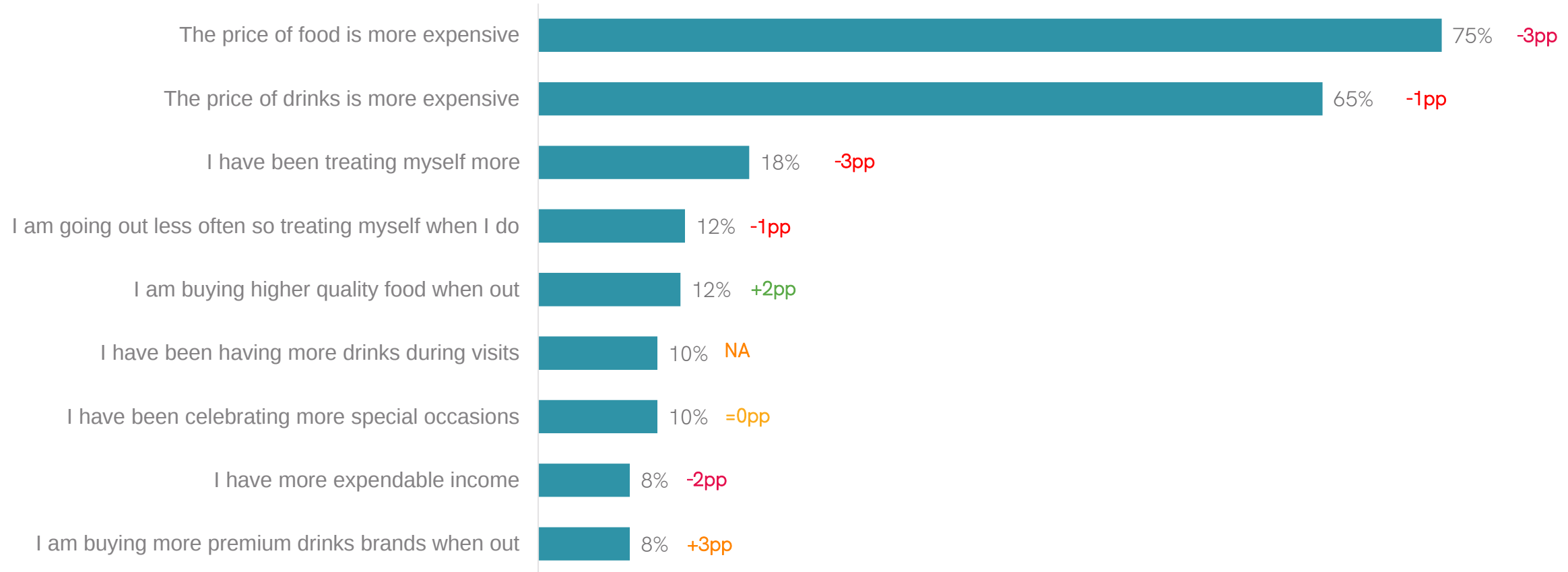


+4pp

■ Increased ■ Stayed the same ■ Decreased

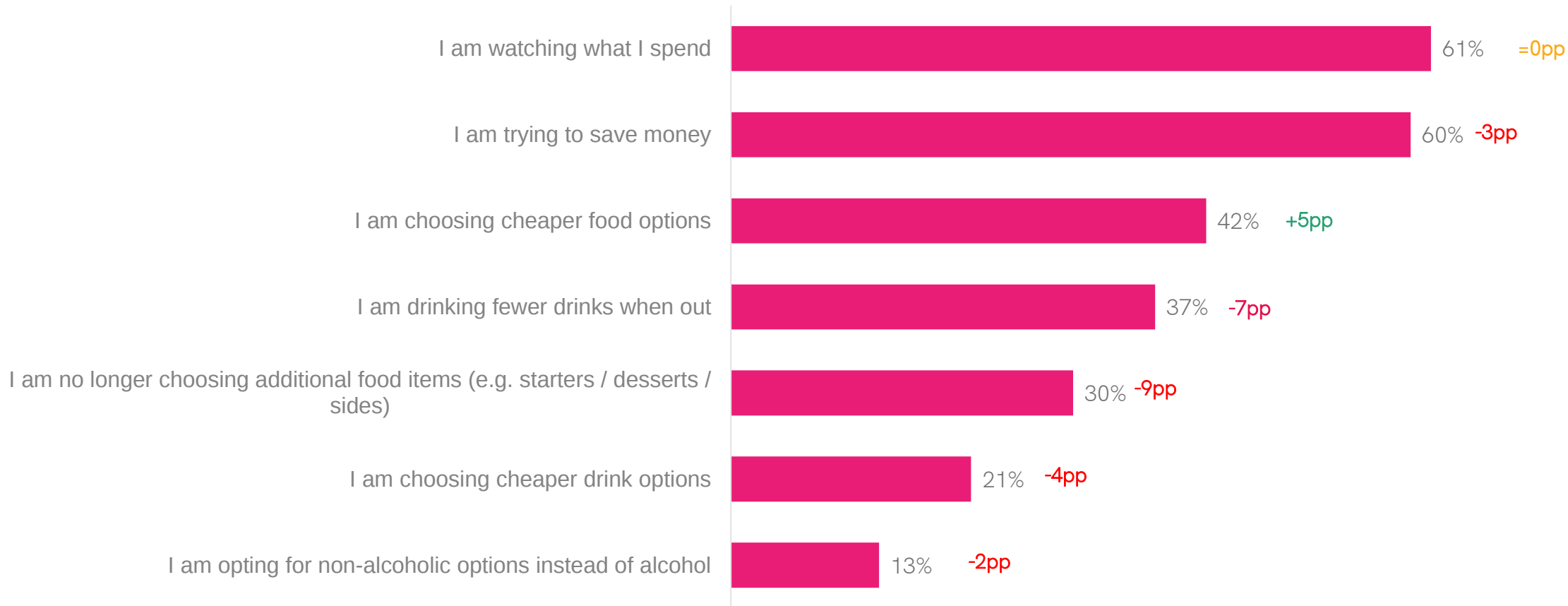
WHICH IF ANY OF THE FOLLOWING ARE REASONS WHY YOU ARE SPENDING MORE NOW WHEN OUT PER VISIT IN BARS, RESTAURANTS AND SIMILAR VENUES?

Reasons for increased spend per visit (vs October)



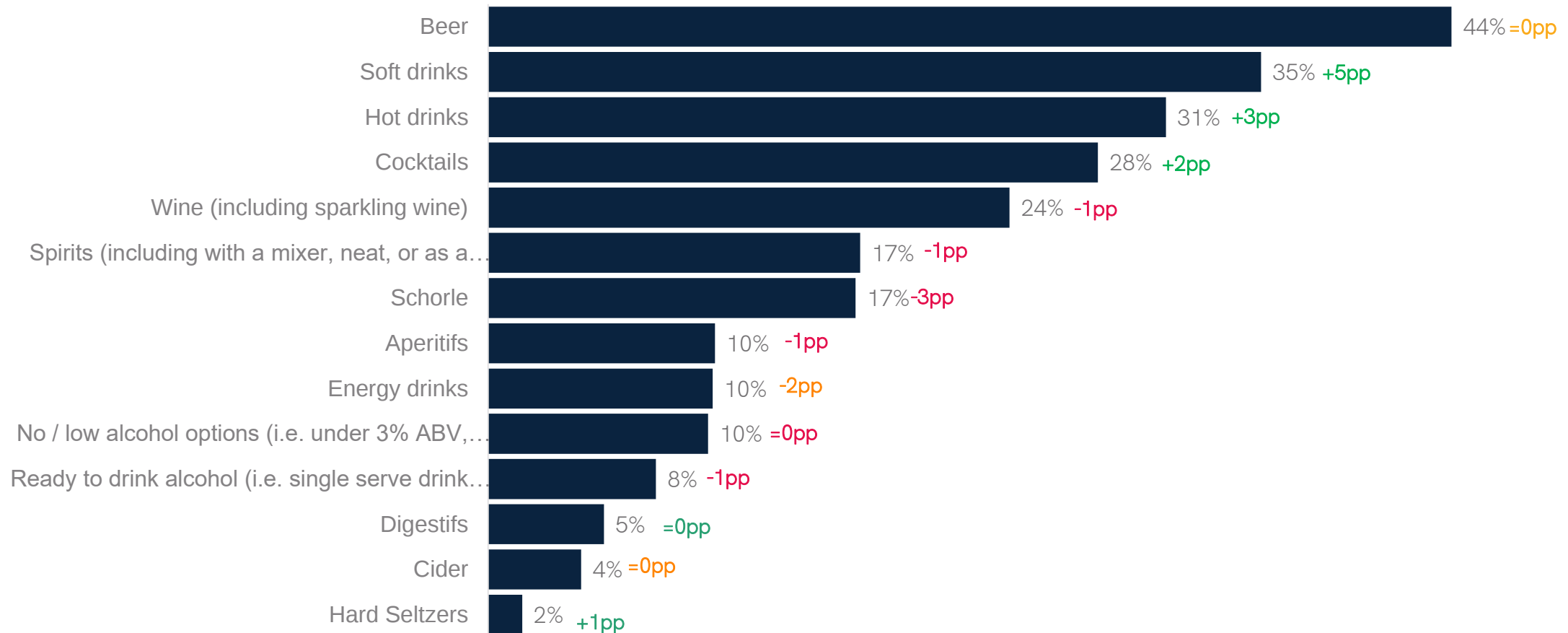
WHICH IF ANY OF THE FOLLOWING ARE REASONS WHY YOU ARE SPENDING LESS NOW WHEN OUT PER VISIT IN BARS, RESTAURANTS AND OTHER SIMILAR VENUES?

Reasons for decreased spend per visit (vs October)



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

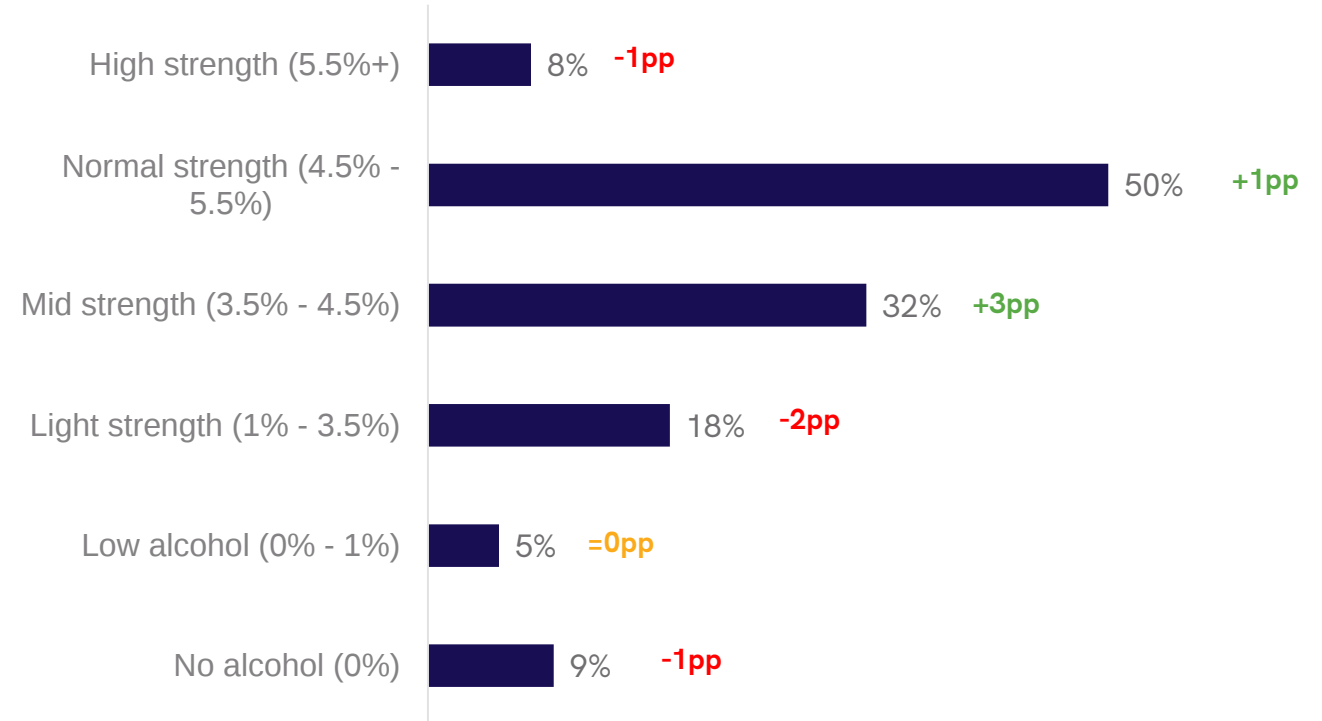
Drink choice of those who have visited the On Premise in the past month (vs October)





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

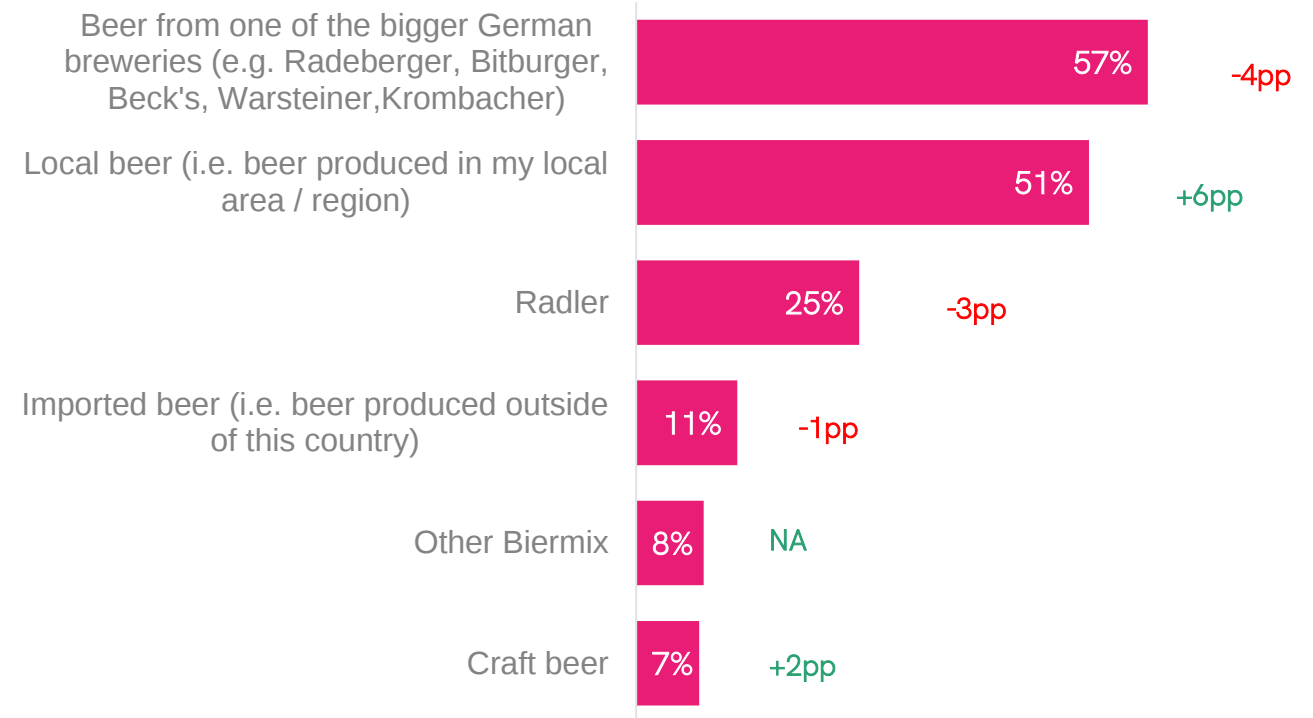
Strengths of beer consumers have drunk in the past month (vs average over past month)





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 (vs October)

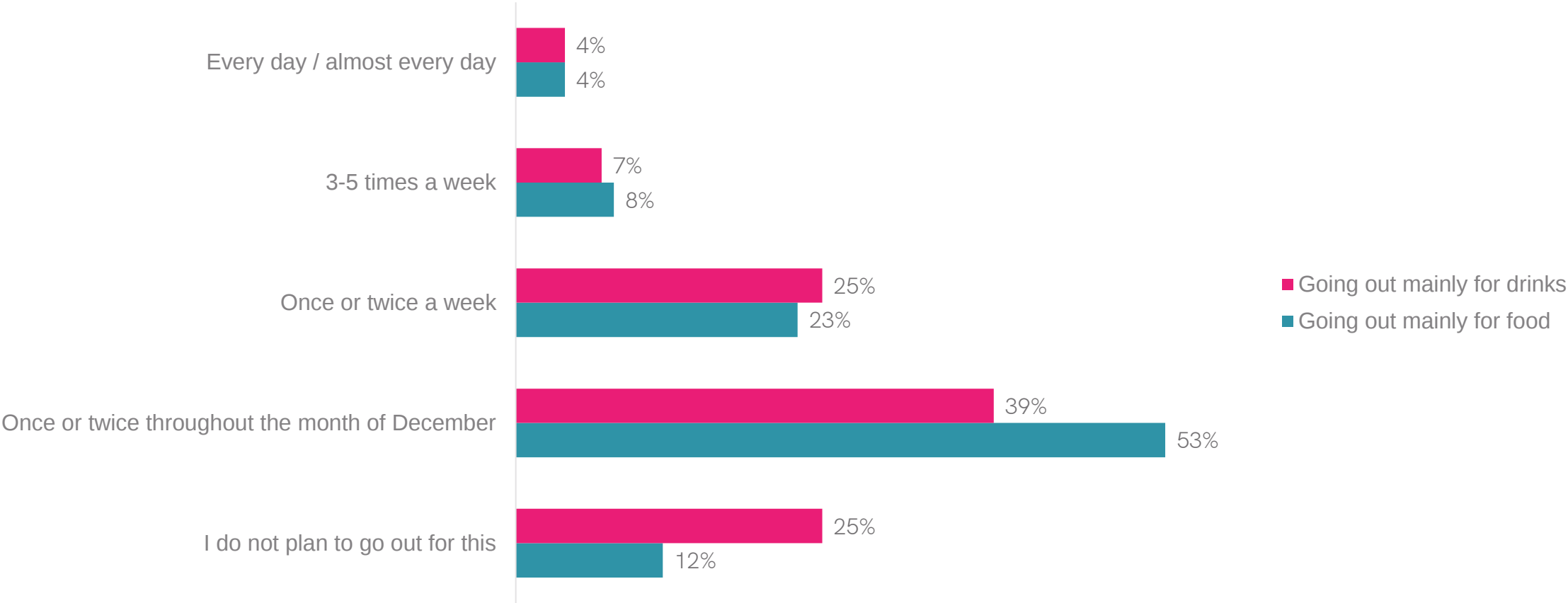


Hot Topic - Christmas



HOW OFTEN DO YOU PLAN TO VISIT PUBS, BARS, RESTAURANTS, OR SIMILAR VENUES OVER THE CHRISTMAS PERIOD (THROUGHOUT THE MONTH OF DECEMBER)

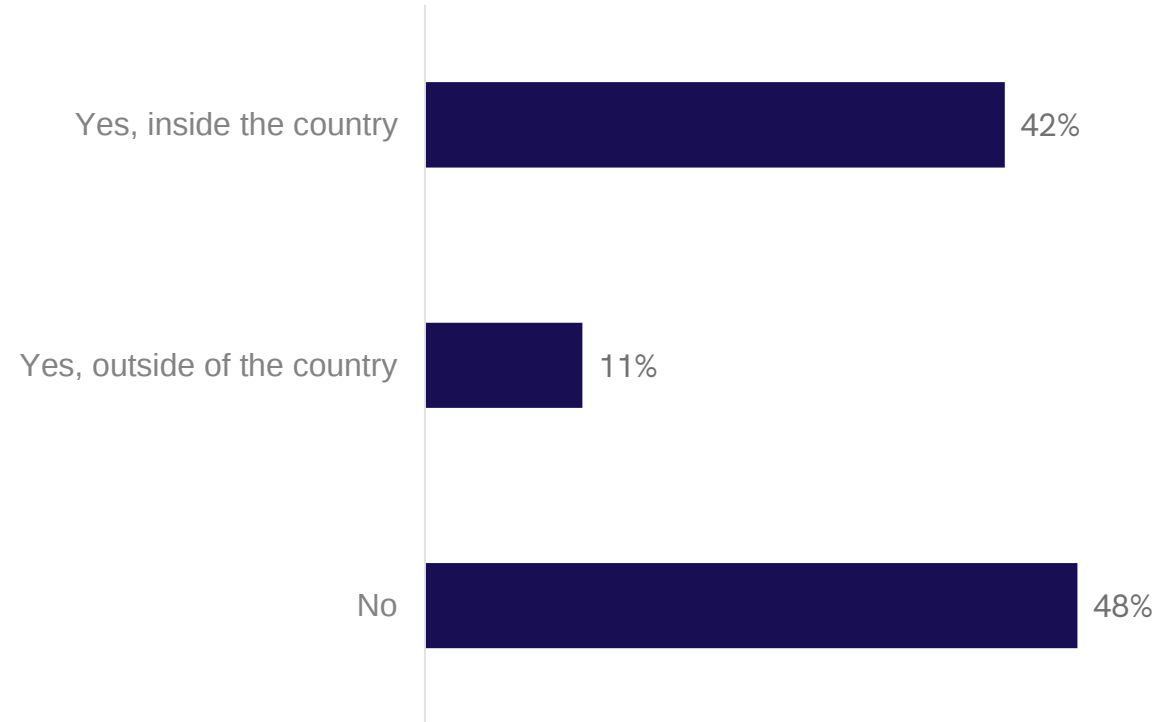
Change in visitation frequency over the Christmas period





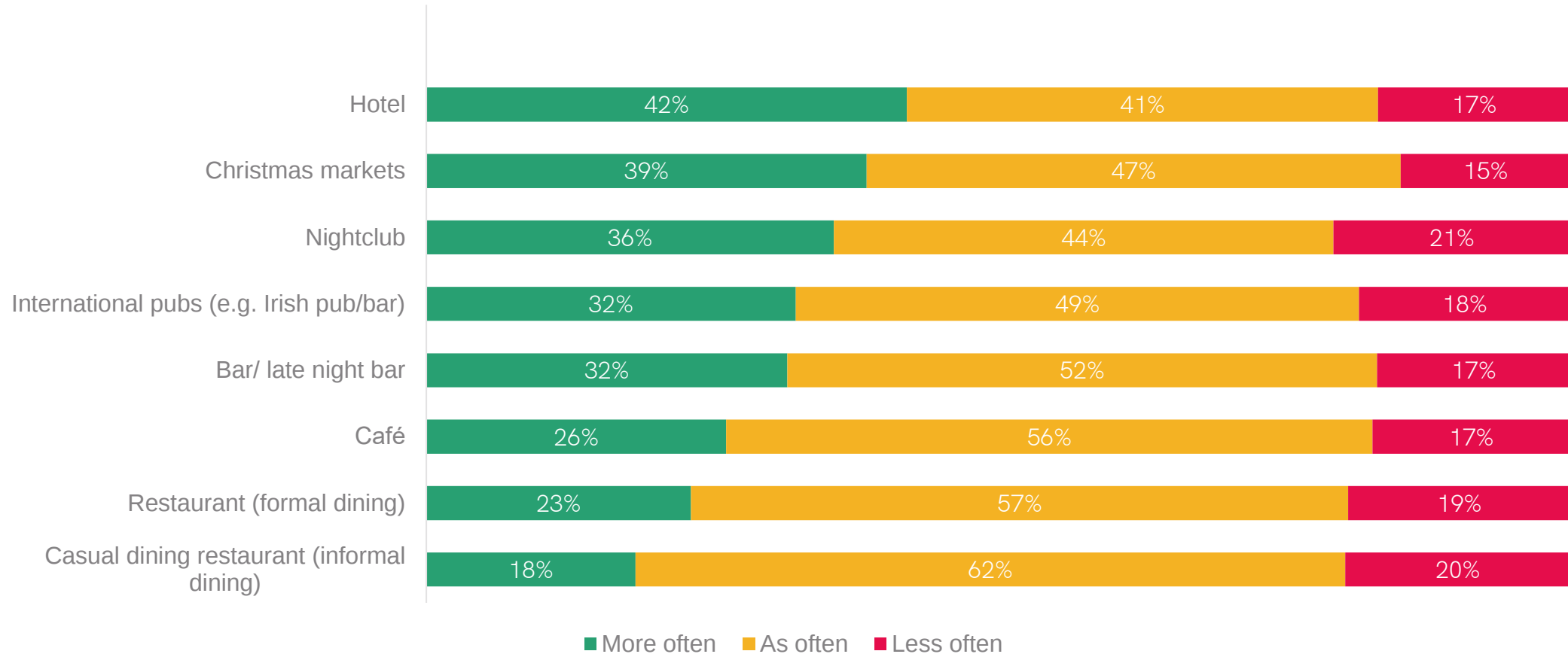
ARE YOU PLANNING ON GOING ON A FESTIVE BREAK THROUGHOUT DECEMBER?

Consumers going on holiday



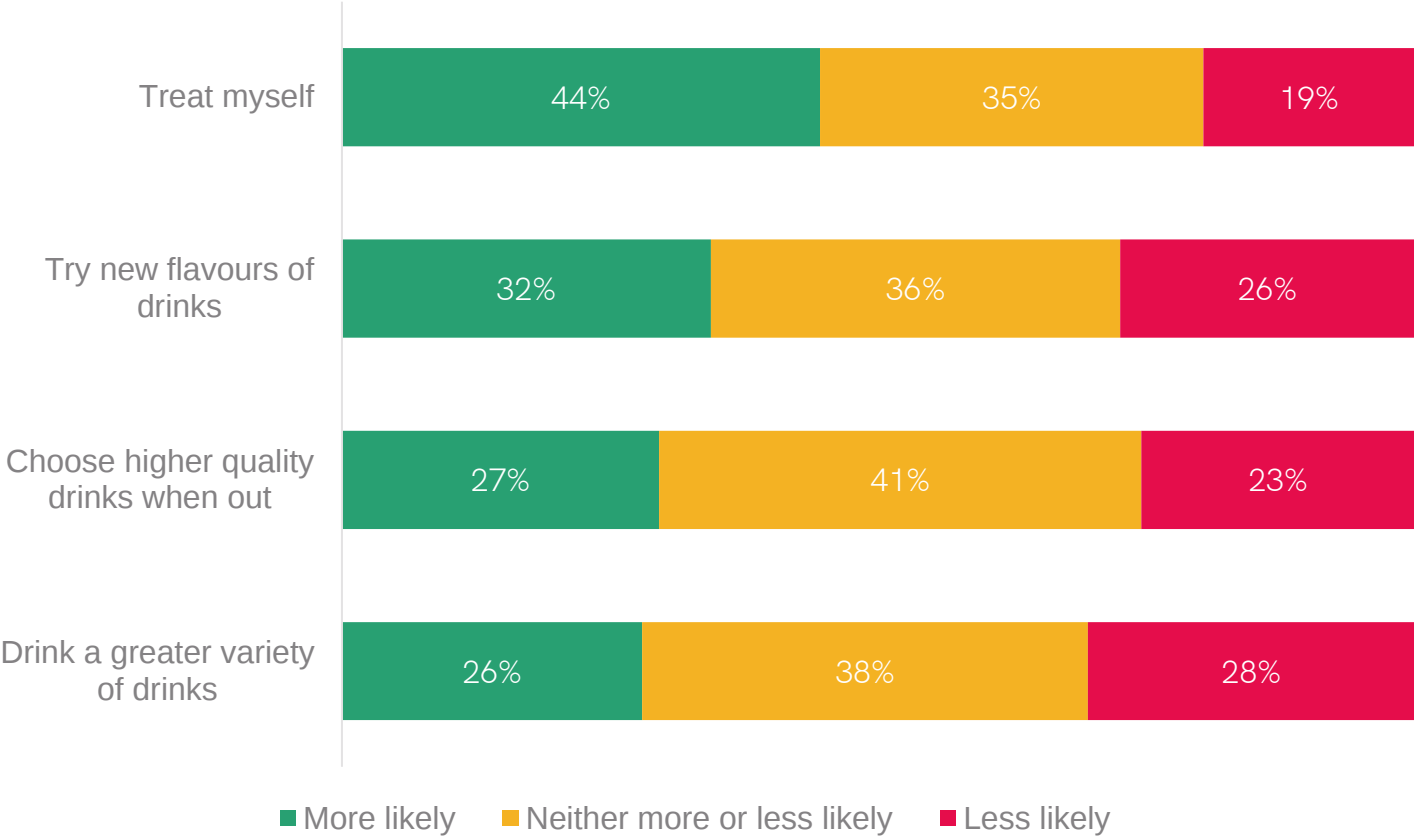
HOW OFTEN DO YOU THINK YOU WILL VISIT THESE VENUES DURING THE CHIRSTMAS PERIOD COMPARED TO USUALLY

Visitation frequency



COMPARED TO ONE YEAR AGO ARE YOU MORE OF LESS LIKELY TO DO ANY OF THE FOLLOWING WHEN VISITING PUBS, BARS, RESTAURANTS, OR SIMILAR VENUES DURING THE CHRISTMAS PERIOD

Change in consumption habits





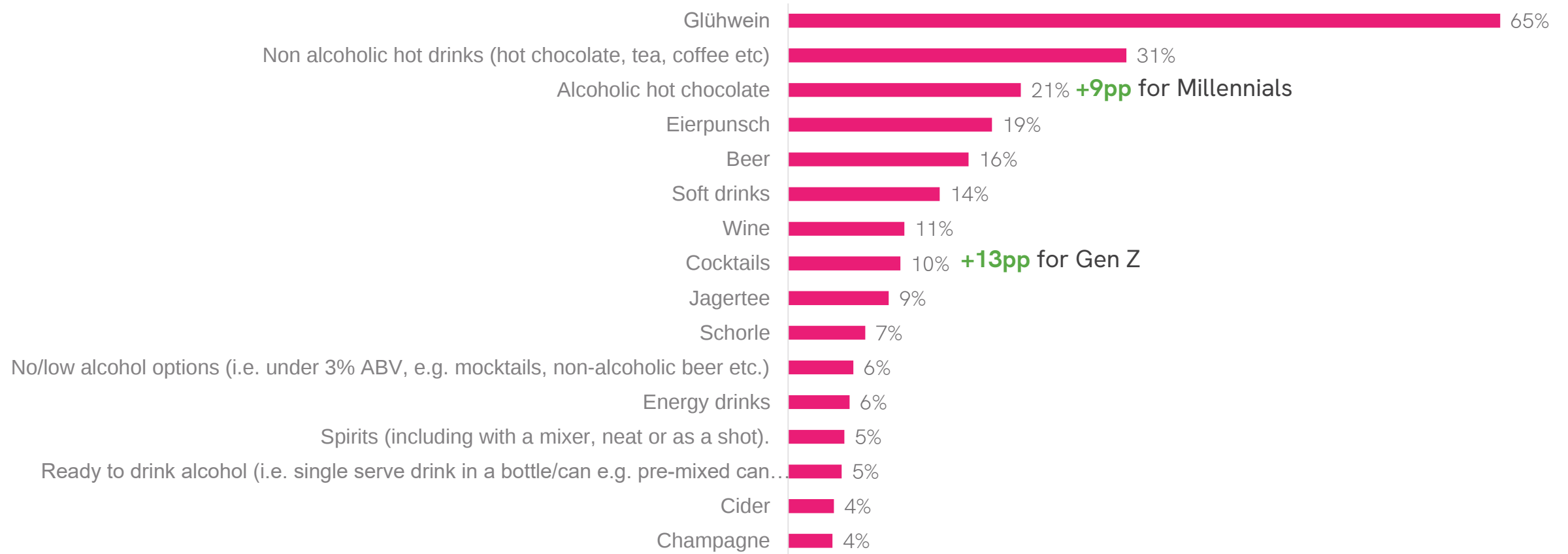
92%

of consumers plan to
visit Christmas markets
over December

+6pp for Gen Z

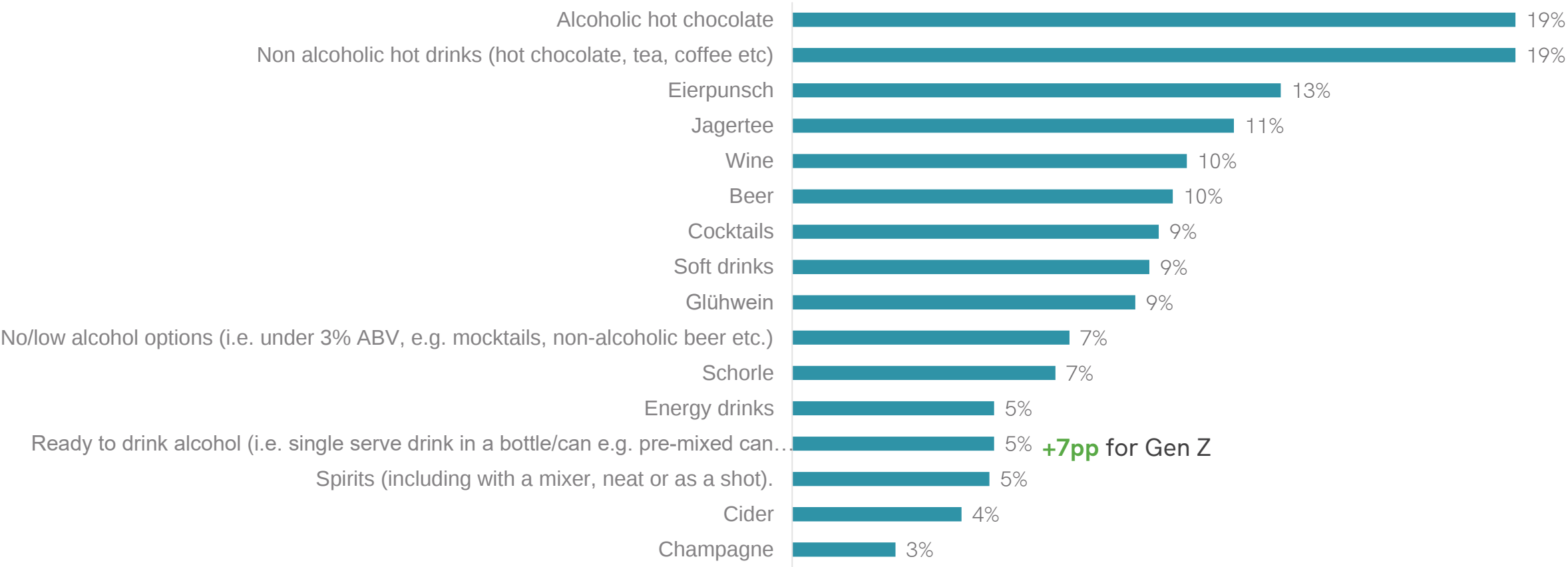
WHICH OF THE FOLLOWING WOULD YOU TYPICALLY DRINK AT A CHRISTMAS MARKET?

Typical drink choice



WOULD YOU CONSIDER DRINKING ANY OF THE FOLLOWING AT A CHRISTMAS MARKET IF THEY WERE AVAILABLE?

Drink choice if available



Hot Topic - Coffee



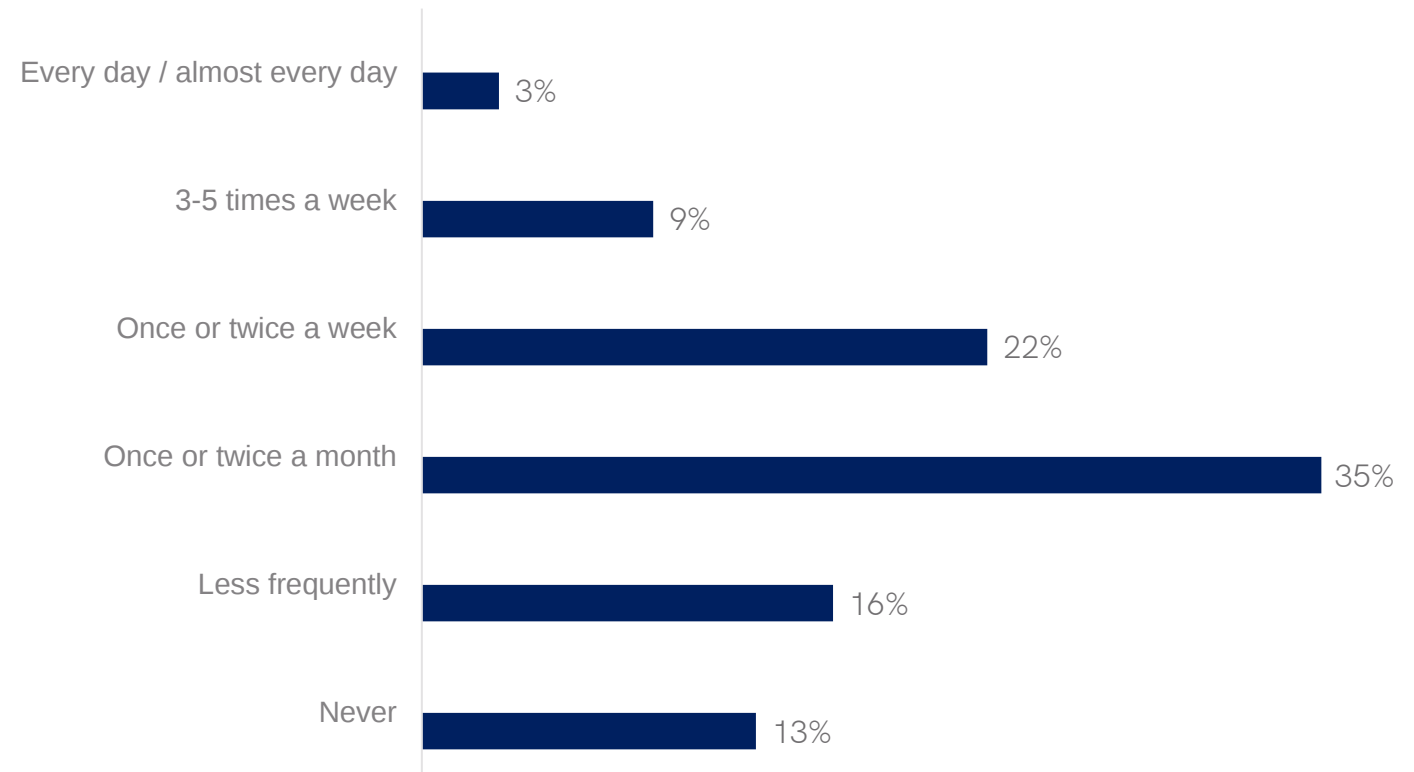
© 2023 Nielsen Consumer LLC. All Rights Reserved.



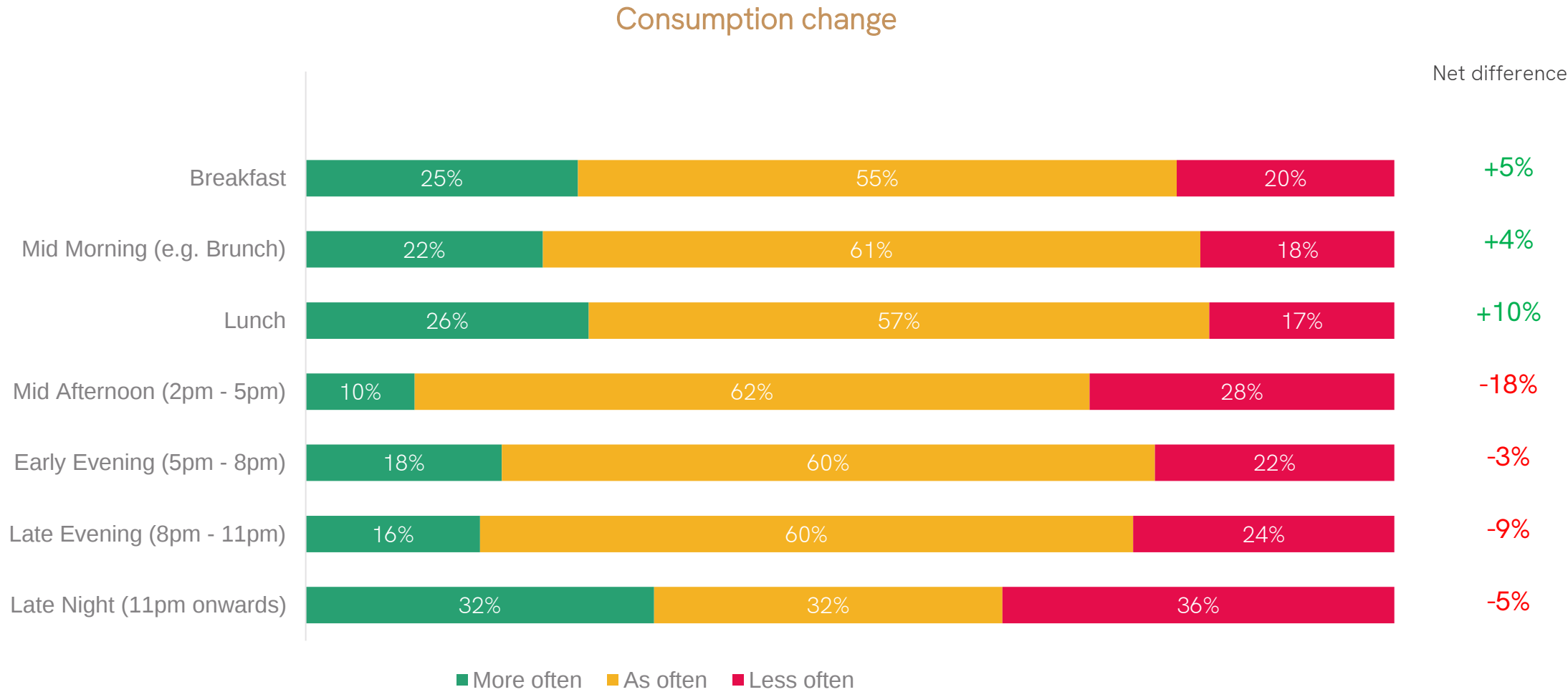


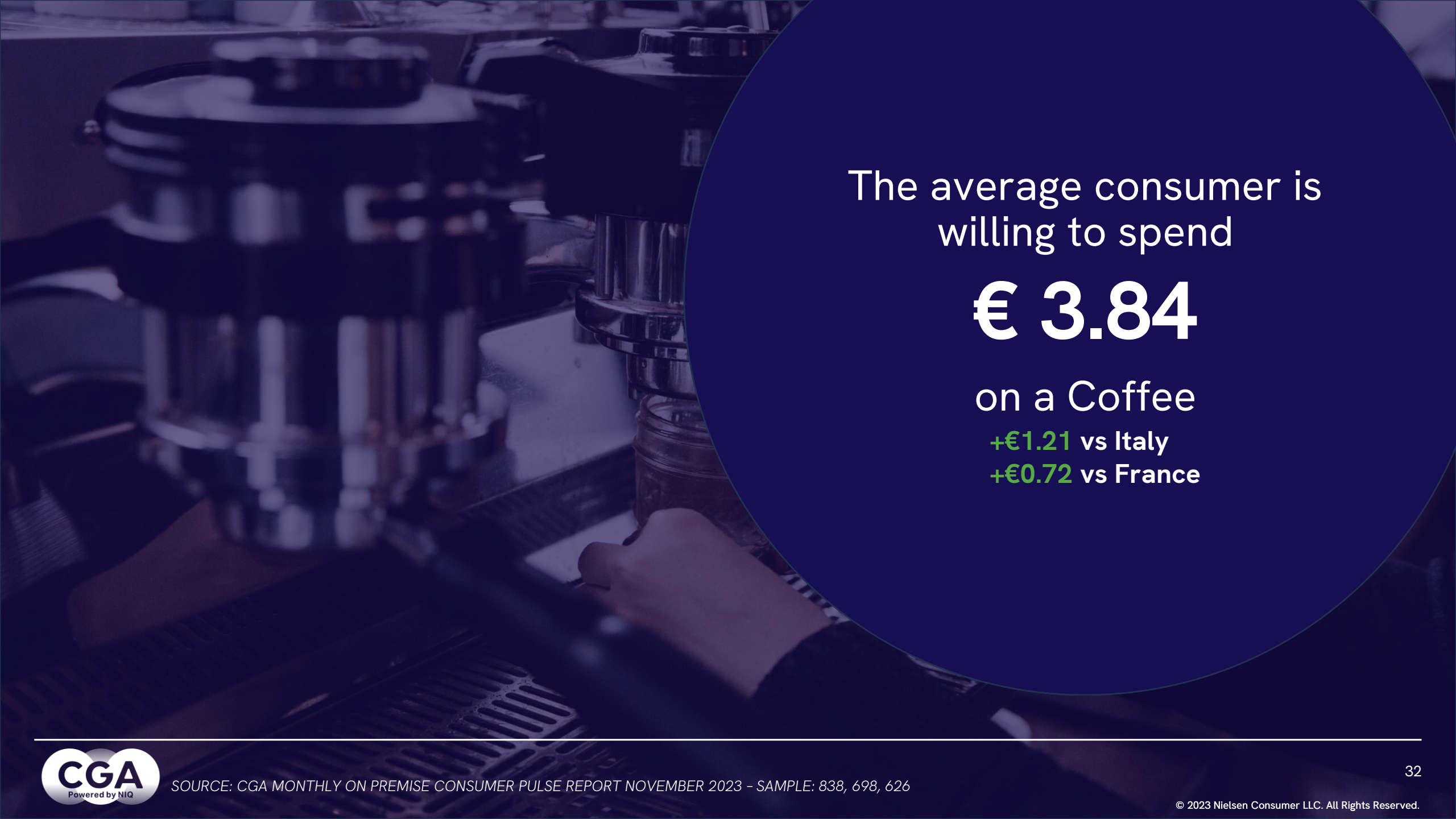
HOW FREQUENTLY HAVE YOU DRUNK COFFEE IN CAFES, BARS, RESTAURANTS OR OTHER SIMILAR VENUES OVER THE PAST THREE MONTHS?

Frequency of Coffee consumption



COMPARED TO ONE YEAR AGO, ARE YOU ORDERING COFFEE MORE OR LESS, AT ANY OF THE FOLLOWING TIMES?





The average consumer is
willing to spend

€ 3.84

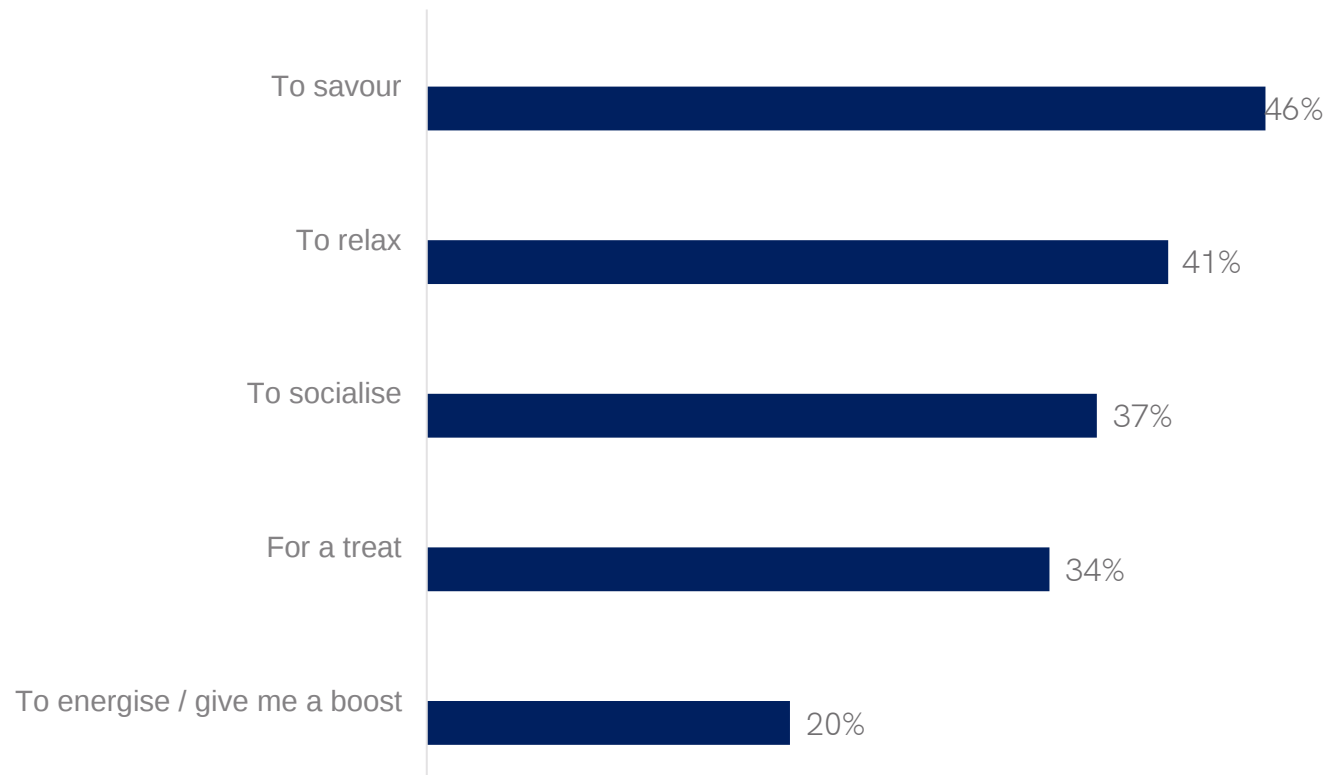
on a Coffee

+€1.21 vs Italy

+€0.72 vs France

WHY DO YOU CHOOSE TO DRINK COFFEE WHEN OUT IN BARS, RESTAURANTS AND OTHER SIMILAR VENUES?

Reason for drink choice



Hot Topic – Ready to Drink Alcohol





DO YOU DRINK READY TO DRINK ALCOHOL WHEN OUT IN VENUES SUCH AS BARS, RESTAURANTS OR SIMILAR VENUES?

Consumption of RTDs



28%

Drink RTD's when
visiting the On
Premise



22%

Drink RTD's at
home but not in the
On Premise



50%

Do not drink RTD's

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 European 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,
please feel free to get in touch:



BILAL KADDOURI

CLIENT SOLUTIONS
DIRECTOR

Bilal.Kaddouri@nielseniq.com



MIRIAM STIRNIMANN

CLIENT SUCCESS & INSIGHT
MANAGER

Miriam.Stirnimann@nielseniq.com



BETH LARMER

SENIOR CONSUMER
RESEARCH EXECUTIVE

Beth.larmer@nielseniq.com

