



WINNING IN HORECA IN BELGIUM

CGA by NIQ: 2023 OPUS Lite Belgium

Gondola Day – 16th May 2024



CGA On Premise Toolkit

Toolkit based on over 30 years of channel experience & specifically designed to provide foundation insights to help you grow HoReCa business

Consumer Insight

Customer Planning & Execution

Sales Tracking vs the Competition

PHASE 1: OPUS Lite

Essential demographic insights & tracking of On Premise behaviour & engagement

PHASE 2: OPUS

Best-in-class consumer research specifically for the On Premise

Used by leading beverage suppliers around the world

PHASE 3: OUTLET INDEX

Robust Outlet Universe database
Uniquely, Outlet Index can be fully customized to reflect client-specified outlet segmentations

PHASE 4: Purchase Trak (Sell-in)

Regional level tracking of brand and category purchase from outlet owners

PHASE 5: Beverage Trak (POS)

Regional outlet-level tracking of brand and category sales

Track sales performance and price against the competition by day, week and month

PHASE 6: OPM (RMS solution)

Full market measurement for brands and categories in the On Premise

OPUS Lite – CGA by NIQ Global On Premise Compass

- 38 countries
- 30 000 On Premise consumers
- 600 operators and bartenders

Consumer research conducted in:

Argentina	Greece	Portugal
Australia	Hong Kong	Romania
Austria	India	South Africa
Belgium	Ireland (ROI and NI)	South Korea
Brazil	Italy	Spain
Canada	Japan	Sweden
China	Kenya	Switzerland
Colombia	Mexico	Taiwan
Croatia	Netherlands	Thailand
Czechia	New Zealand	Turkey
France	Nigeria	US
GB	Philippines	Vietnam
Germany	Poland	

Operator research conducted in:

Australia	Italy
Brazil	Mexico
Canada	South Korea
France	UK
Germany	US

504 interviews in Belgium in April 2023

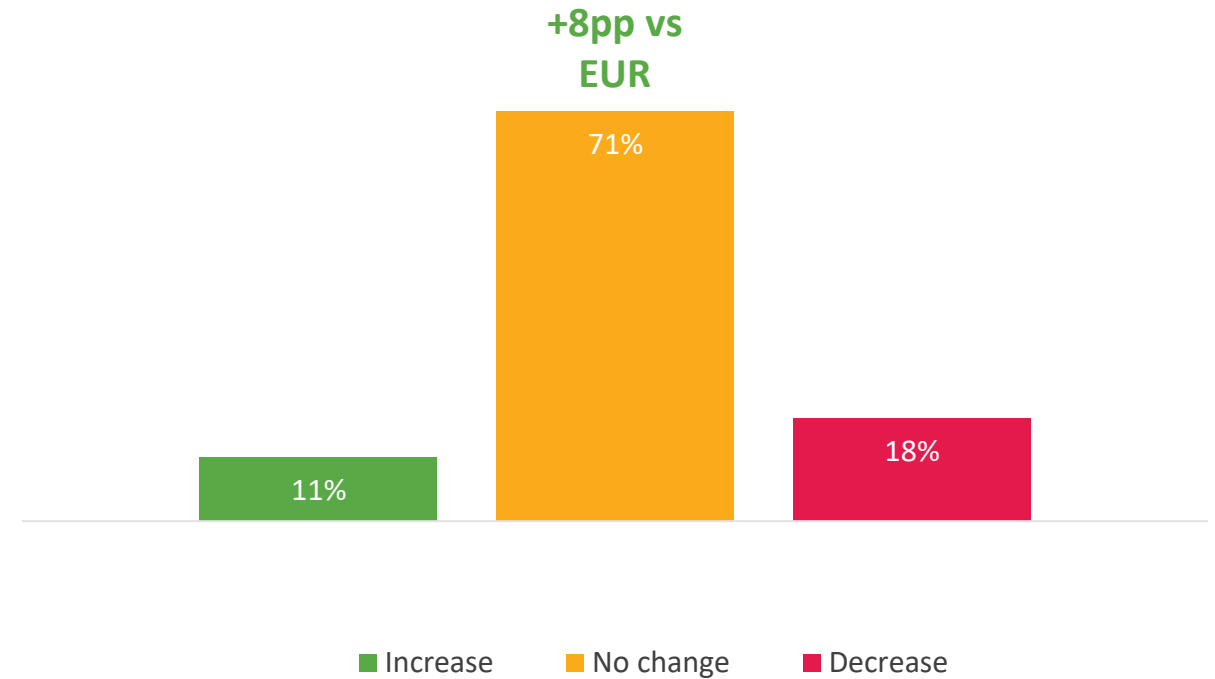


4 in 10 Belgians drink in the On Premise at least once a week
Belgians more optimistic than average European for 2024



39%

of Belgians visit the
On Premise weekly
for drinks



Expected change in frequency visiting the On Premise in Belgium

Restaurants leading the way in On Premise visitation

Bars and Cafes critical for success in the channel



RESTAURANTS



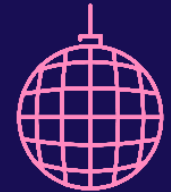
CAFES



BARS



LEISURE VENUES



NIGHTCLUBS



79%

53%

36%

17%

7%



80%

23%

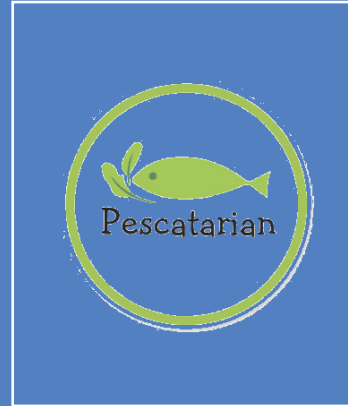
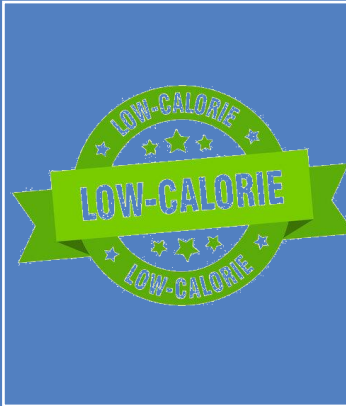
29%

19%

11%

“What hospitality venues do you typically visit?”

What dietary options do patrons expect restaurants to cater for?



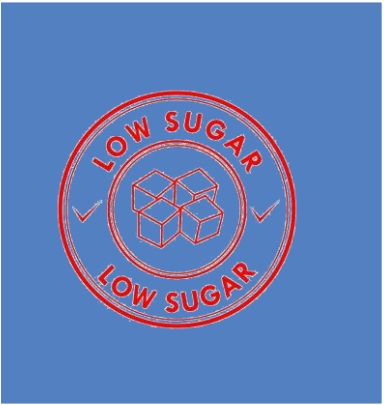
What dietary options do patrons expect restaurants to cater for?



10%
of Belgian consumer



10%
of Belgian consumer



12%
of Belgian consumer



5%
of Belgian consumer



57% said
“none”

1 in 2 Belgians drink wine in On Premise – significantly higher than EUR average
Soft drinks and beer follow closely



How did category penetration compare to 2022?



WINE

50%



SOFT
DRINKS

46%



BEER

45%



COCKTAILS

29%



NOLO

17%



SPIRITS
with mixer

14%



SPIRITS
neat

10%



CIDER

10%

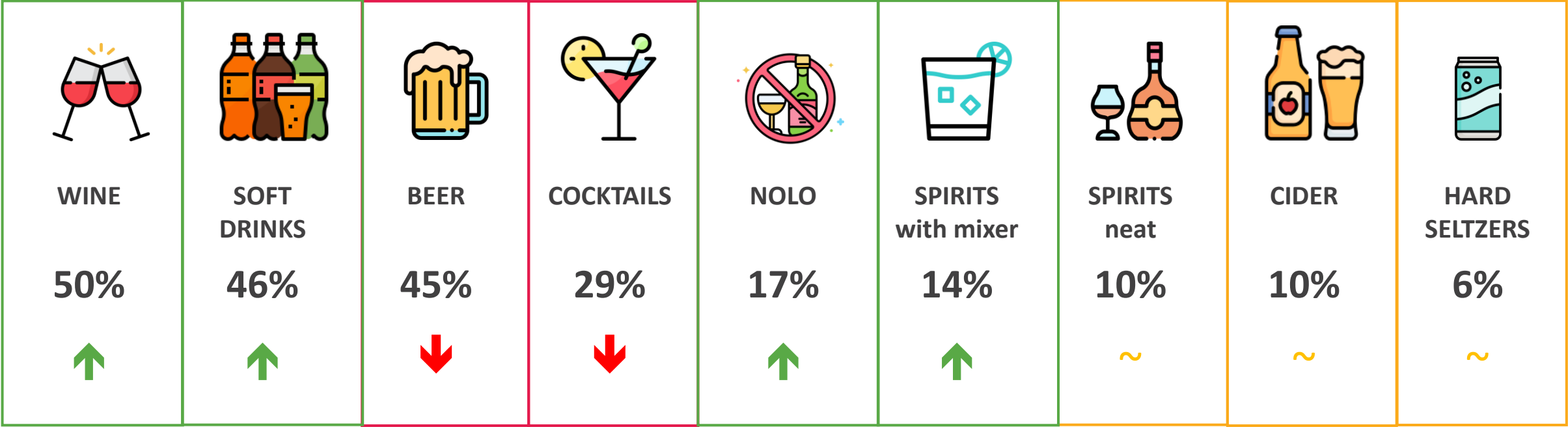


HARD
SELTZERS

6%

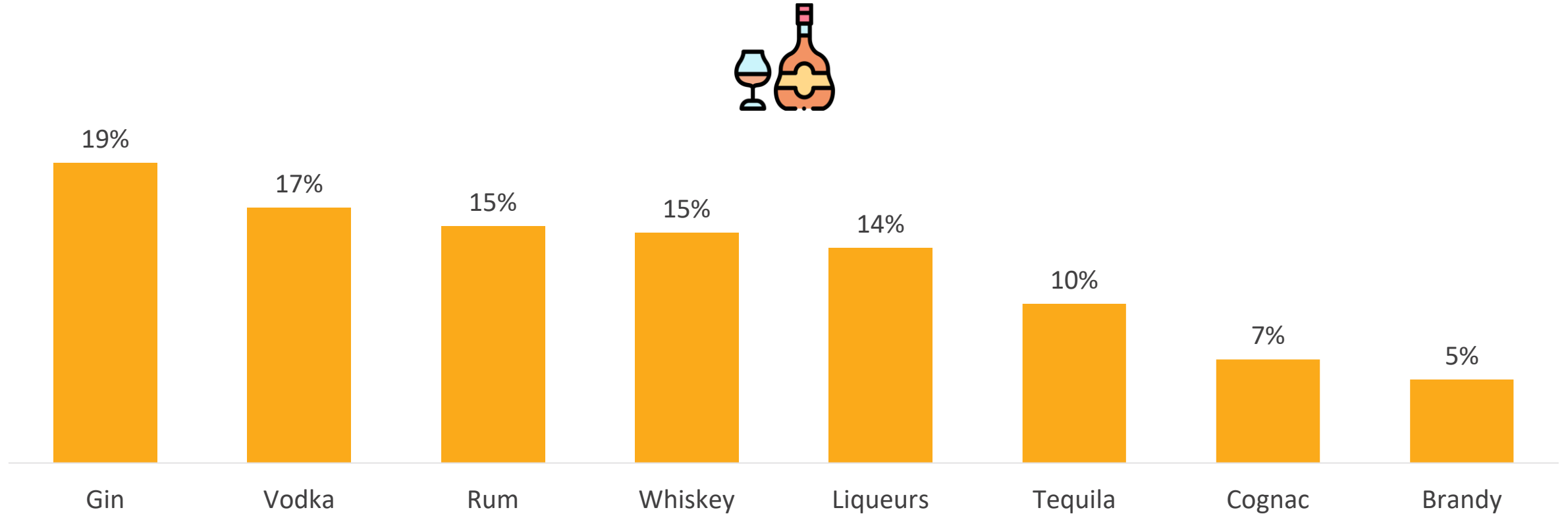
“Which drinks do you typically have when going out?”

NoLo, Spirits, Soft Drinks & Wine increased penetration in 2023



“Which drinks do you typically have when going out?”
2023 results | Trend vs 2022

Gin and Vodka lead the way in spirits followed closely by Rum and Whiskey



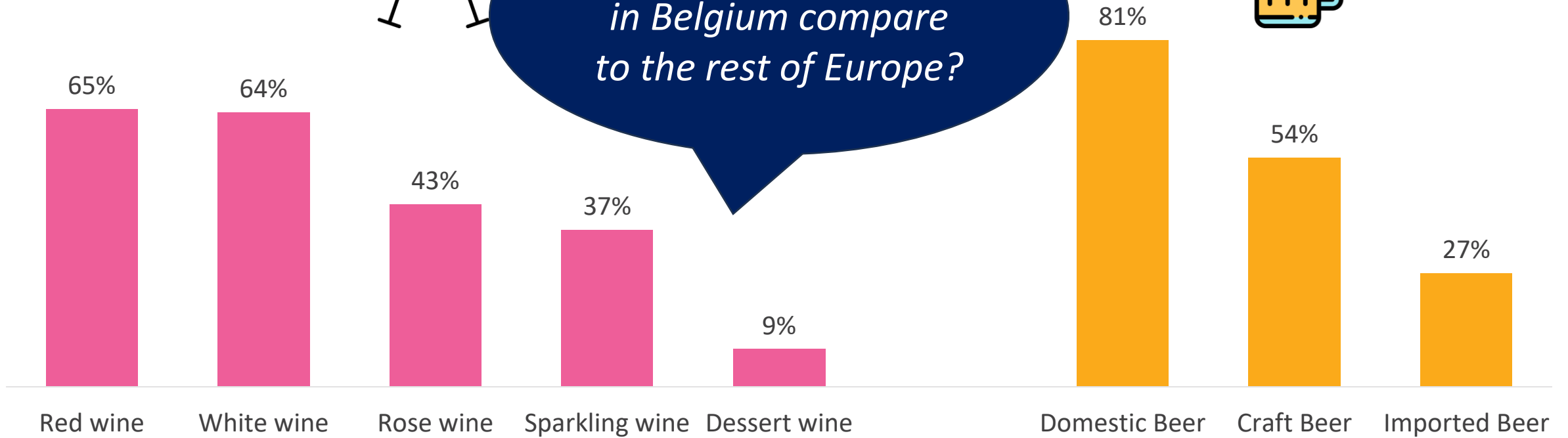
"Drink types drunk when going out"



Belgians have wide repertoire of types of wine
They also prefer domestic & craft to imported beer

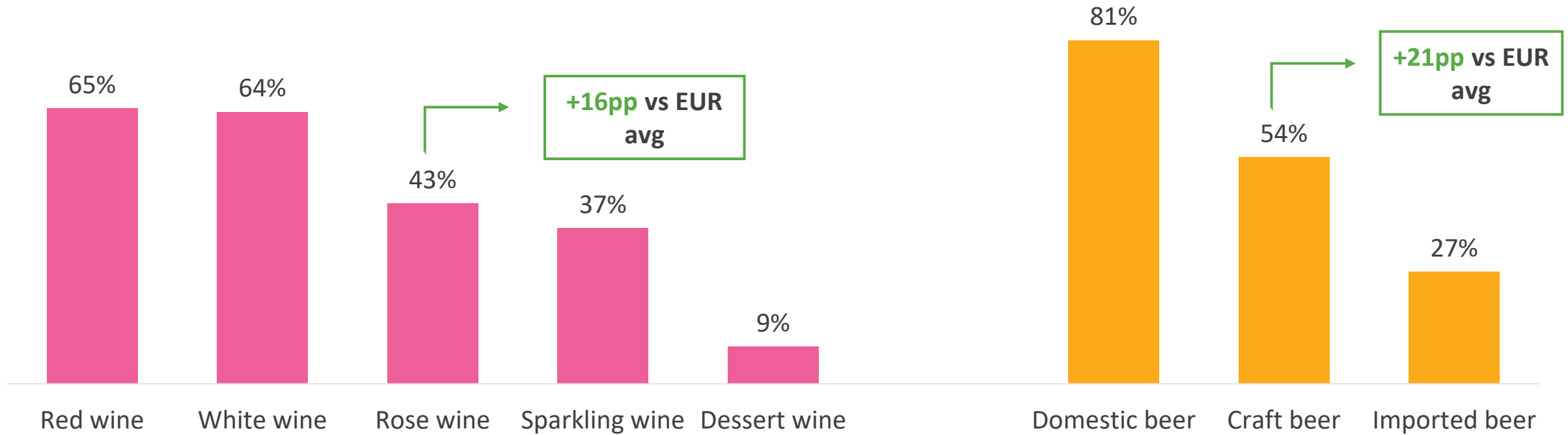


*How did wine & beer
in Belgium compare
to the rest of Europe?*



"Drink types drunk when going out"

Belgians significantly over-index vs average European in Rose wine & Craft beer



"Drink types drunk when going out"

What are the three most important factors when deciding what to drink?



Drink is the “house” option

Drink stands out on the menu

Drink is on offer or promotion

1. Bar staff recommendations

Drink is highly visible in the venue



A background photograph of four young adults (three men and one woman) sitting around a table in a restaurant, smiling and eating. In the foreground, there are plates of food, including a burger, and glasses of beer.

48%

of consumers are likely
or very likely to
recommend a drinks
brand after having a
positive experience
with it

Securing a perfect
presence and serve for
your brand in the outlet
pays dividends.
Happy consumers become
brand ambassadors



70%

of Belgian Consumer at least occasionally look at a venue's online reviews prior to visiting

With **45%**

actively seeking out positive reviews before visiting a venue

Unrivalled, ongoing provision of **On Premise** Data & Insights to support your channel plans



REACH – OPUS Lite

Global consumer survey
to identify trends &
navigate the channel



BARSIGHTS

Bar-staff Survey to drive
advocacy &
recommendation with
operators



OPUS

On Premise User Survey
to win with consumers
in your market



OPM

Category & Brand sales
& market share tracking
for the On Premise
market



OUTLET INDEX

Outlet Universe database
to inform your RTM
strategy & direct your
expansion

OPUS Lite 2024 – Themes addressed in Belgium

Standard demographic questions & tracking On Premise behaviour and engagement

On Premise
sentiment

Drink choices

Moderation, NoLo
& sober curious

NEW

Cost of Living

Evolving path to
purchase

Brand values &
social
responsibility

NEW

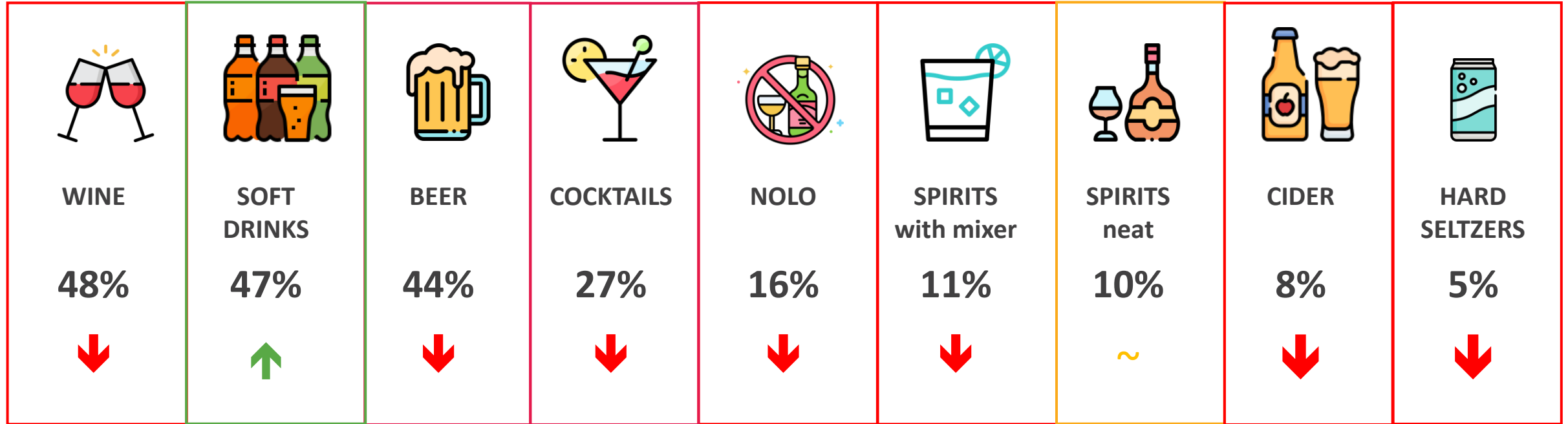
Emerging food &
drinks trends

Changing dayparts

Technological
advancements in
the On Premise

NEW

Most drinks categories declined In 2024 in Belgium. Even more important to fine tune your brand strategy and improve your brands footprint with consumers



“Which drinks do you typically have when going out?”
2024 results | Trend vs 2023

Do you know?

- How cross-category drinks consumption is affecting your brands? What threats and opportunities for growth emerge, and how can your Innovation and Marketing strategy address them?
- What types of outlets are more important, and how they play across consumption occasions? How can you improve your channel strategy to take advantage of emerging consumption trends?
- Who your consumers are, and how they compare to the category? How can you best target the most valuable consumers to secure growth for your brands?
- What is driving drinks and brand choice? Do you position your brands in the right place and with the right influencers to always be top of mind?
- What role do social media and digital play for your category? Have you positioned your brands on-line to future proof your strategy for the new generations?



To learn more
about the
Belgium On
Premise, get
in touch:



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