GERMANY ON PREMISE CON SUMER PULSE REPORT

CGA by NIQ, December 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 Italy.
- 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 **December 2023** issue, we surveyed 1001 consumers (aged 18+) between 15th December – 5th January. 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 health and moderation and Dry January, as well as consumer plans and behaviours in 2024.

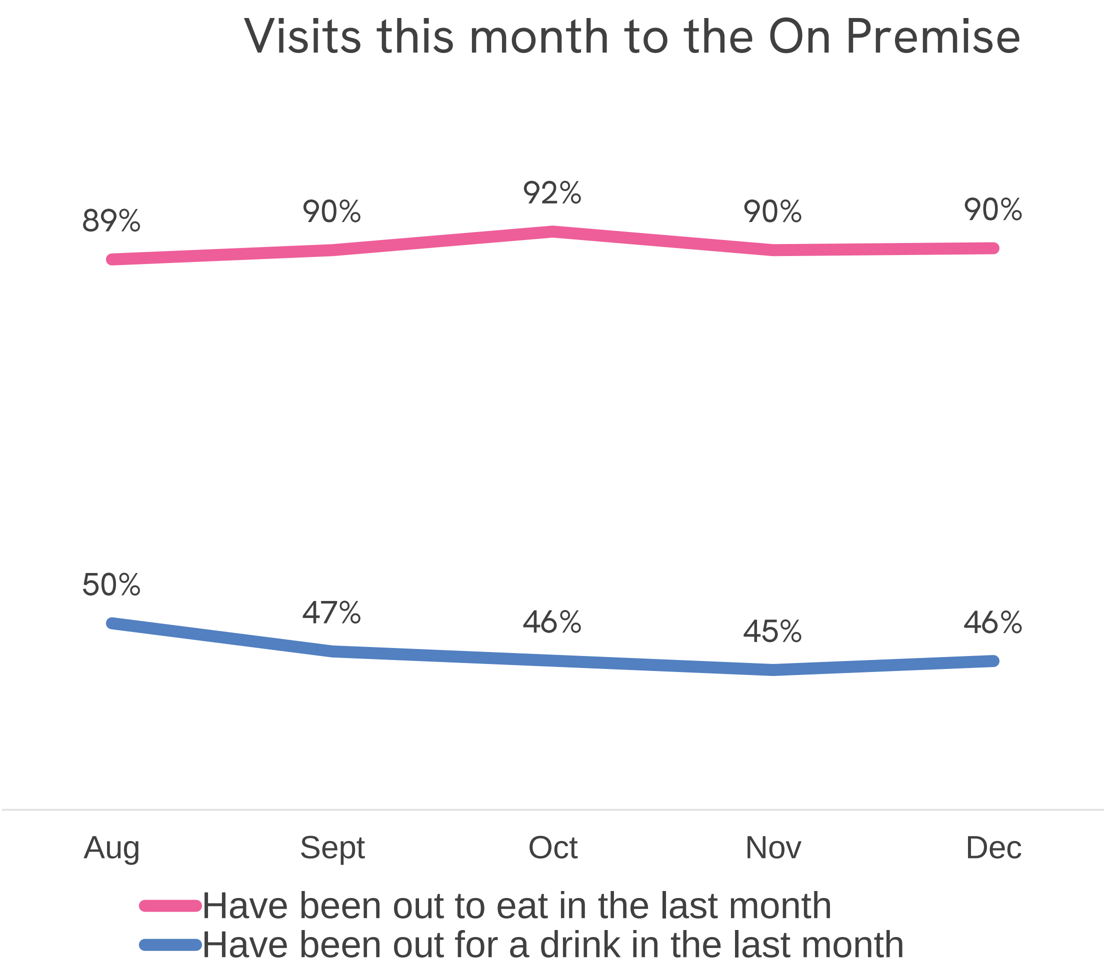
SUMMARY: TOPLINE VISITATION & INTENTION

- On Premise visitation has remained consistent compared to November, with visits for food remaining relatively stable and visits for drinks seeing a slight increase.
- Gen Z remain the demographic to target, visiting the On Premise much more than average this month, and planning to go out more than the average consumer and spending more in the On Premise.
- Consumers who are spending more are doing so because of a general price increases, but there was also growth in the proportion of consumers spending more due to wanting to treat themselves and the proportion buying higher quality food.
- Looking forward to 2024, just over 1 in 10 plan to go to venues more compared to 2023, and just under half plan to maintain their current frequency from 2023. Around a third of consumers plan to go out less often. However, those planning to visit less often in 2024, are not those who are typically highly engaged with the On Premise, and tend to be older and visit the On Premise less frequently.
- Dry January is a key habit consumers are adopting. Just over a quarter of consumers plan to stop drinking completely during January and just under 3 in 10 plan on reducing their alcohol consumption.
- Moderation is not a trend that looks set to slow after Dry January, with just over half of consumers planning to regulate their alcohol consumption throughout 2024. This provides opportunity for growth in soft drinks, mocktails and no/low categories, particularly amongst Gen Z

CGA
Powered by NIQ

KEY METRICS / ON PREMISE VISITATION

VISITATION IN THE ON PREMISE OVER THE PAST MONTH



95% visited the On Premise this month.
-1pp vs November

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2023 – SAMPLE: 996 - 1001

LOOKING AHEAD

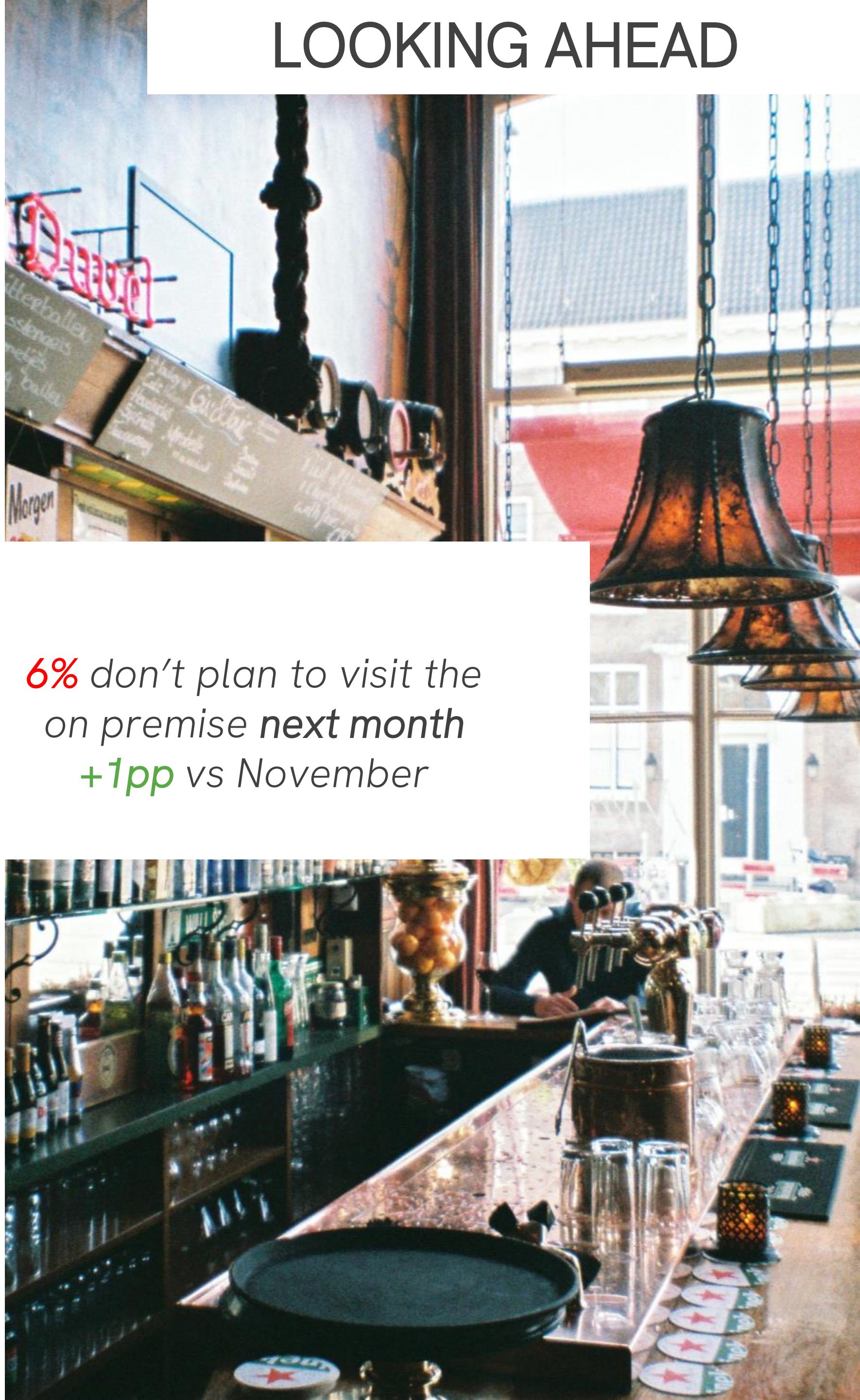
VISITATION PLANS FOR THE ON PREMISE MONTH AHEAD

87%

Plan to go out to eat in the next month
-1pp vs November

49%

Plan to go out to drink in the next month
+1pp vs November



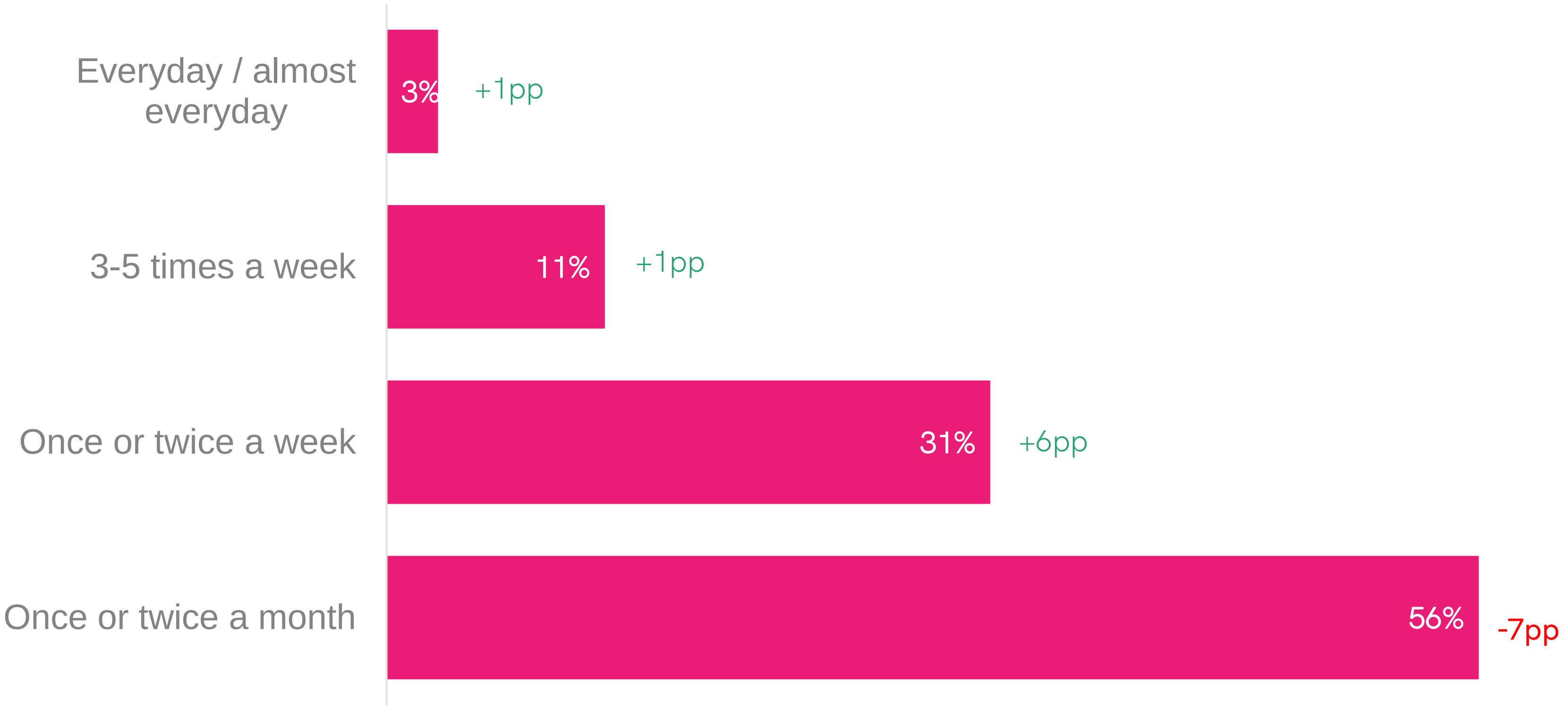
*6% don't plan to visit the on premise **next month***
+1pp vs November

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT NOVEMBER 2023 – SAMPLE: 1001

CGA Powered by NIQ

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

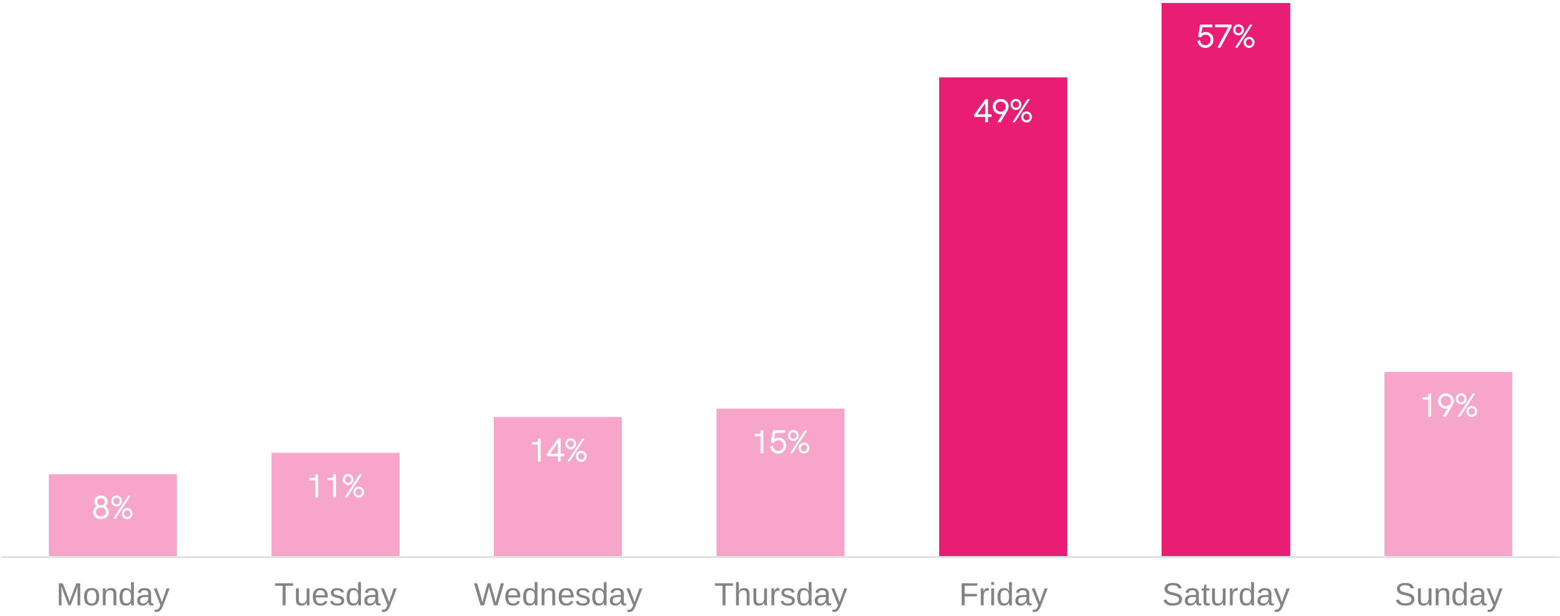
Visiting habits (vs November)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2023 – SAMPLE: 961, 954

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 NOVEMBER 2023 – SAMPLE: 954

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

Change in frequency of visitation

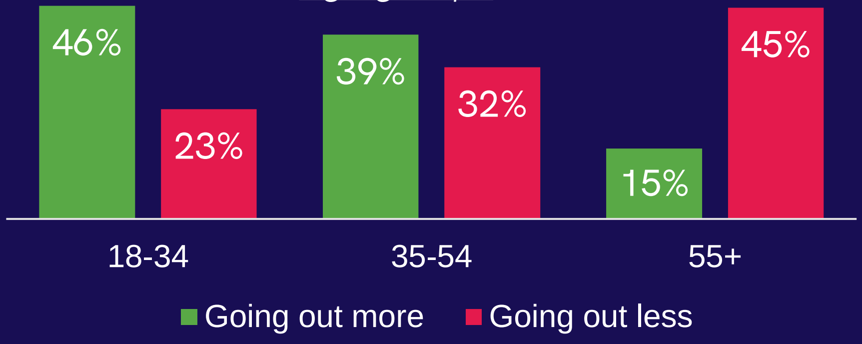
19%	42%	39%
Going out more often	Going out the same	Going out less often
+1pp vs November	=0pp vs November	-1pp vs November

CGA Powered by NIQ

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

♂ 50% 42%

♀ 50% 58%

Location of residence

62% 46%

City centre / town centre

38% 54%

Rural / suburban

Average household income

€41,290

€34,616

Typically visits the On-Premise…

At least weekly 79% 19%

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT NOVEMBER 2023 – SAMPLE: 139, 294

36%

Of Gen Z are going out more often this month

+17pp vs average consumer

37%

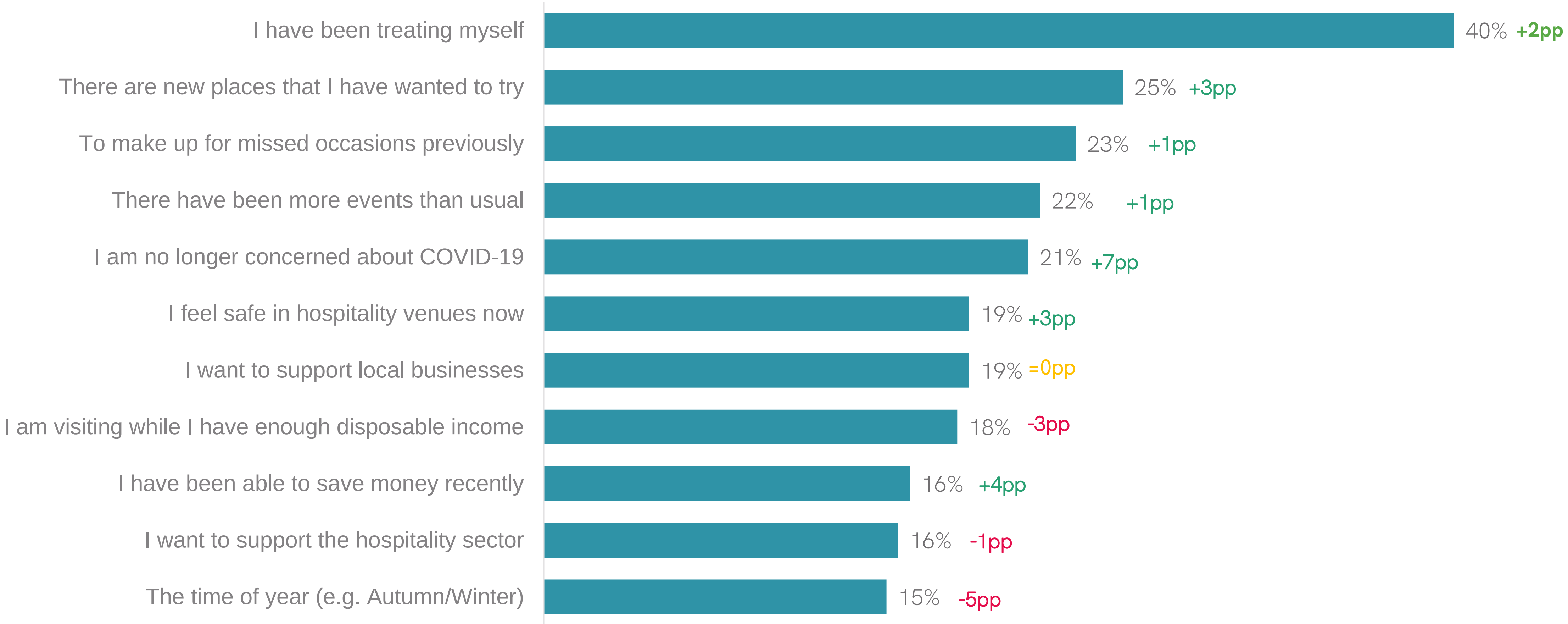
Of Gen Z are spending more overall on eating and drinking out this month

+10pp vs average consumer

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT NOVEMBER 2023 – SAMPLE: 1001, 142

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

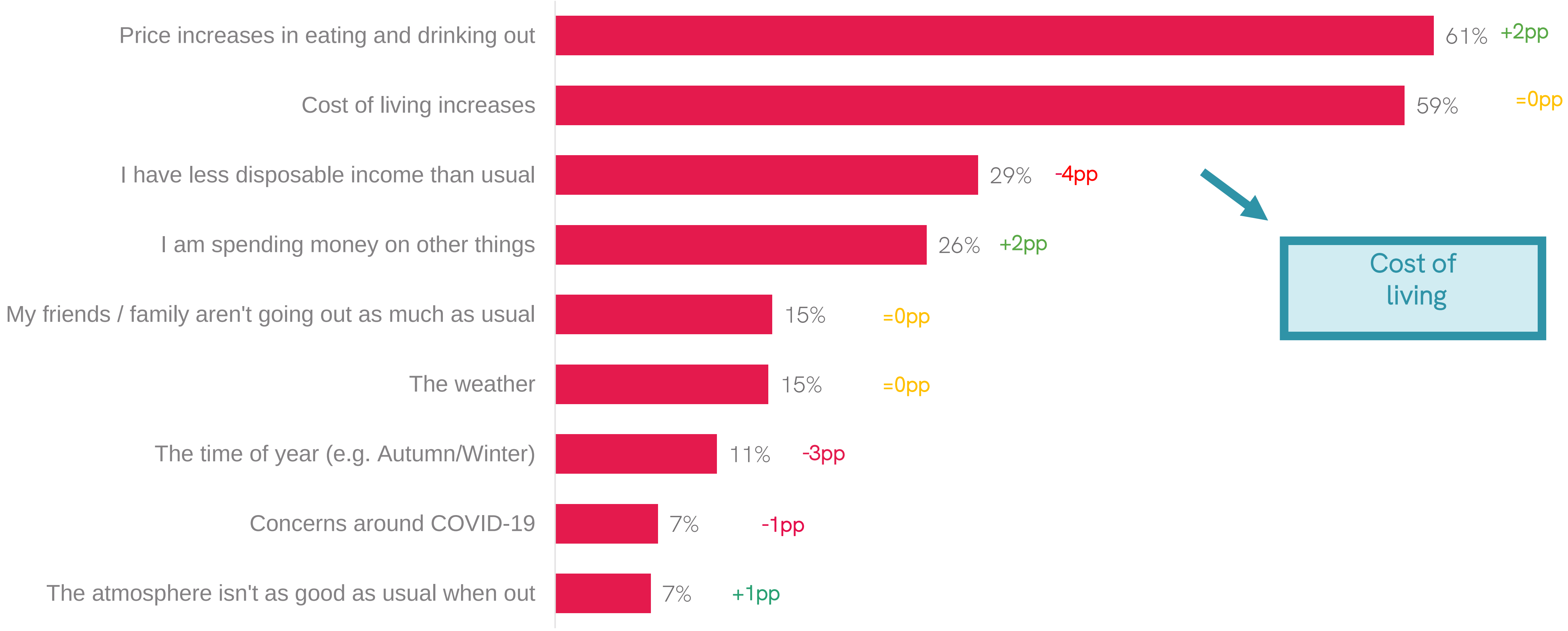
Reasons for going out to the on premise more frequently than usual (vs November)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2023 – SAMPLE: 193,194

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

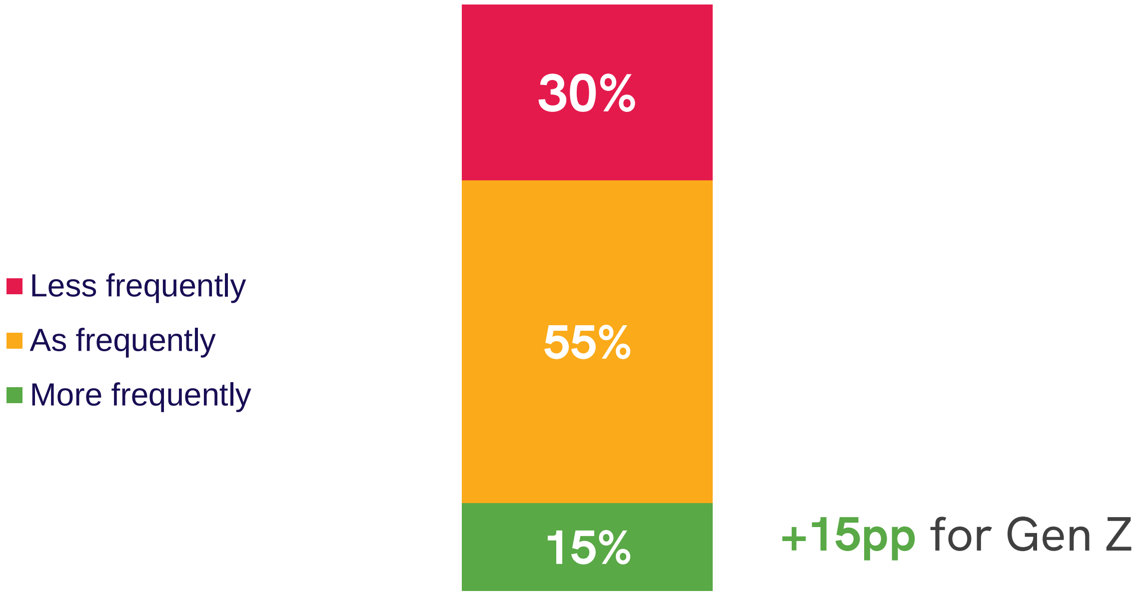
Reasons for going out to the on premise less frequently than usual (vs November



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2023 – SAMPLE: 400, 375

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

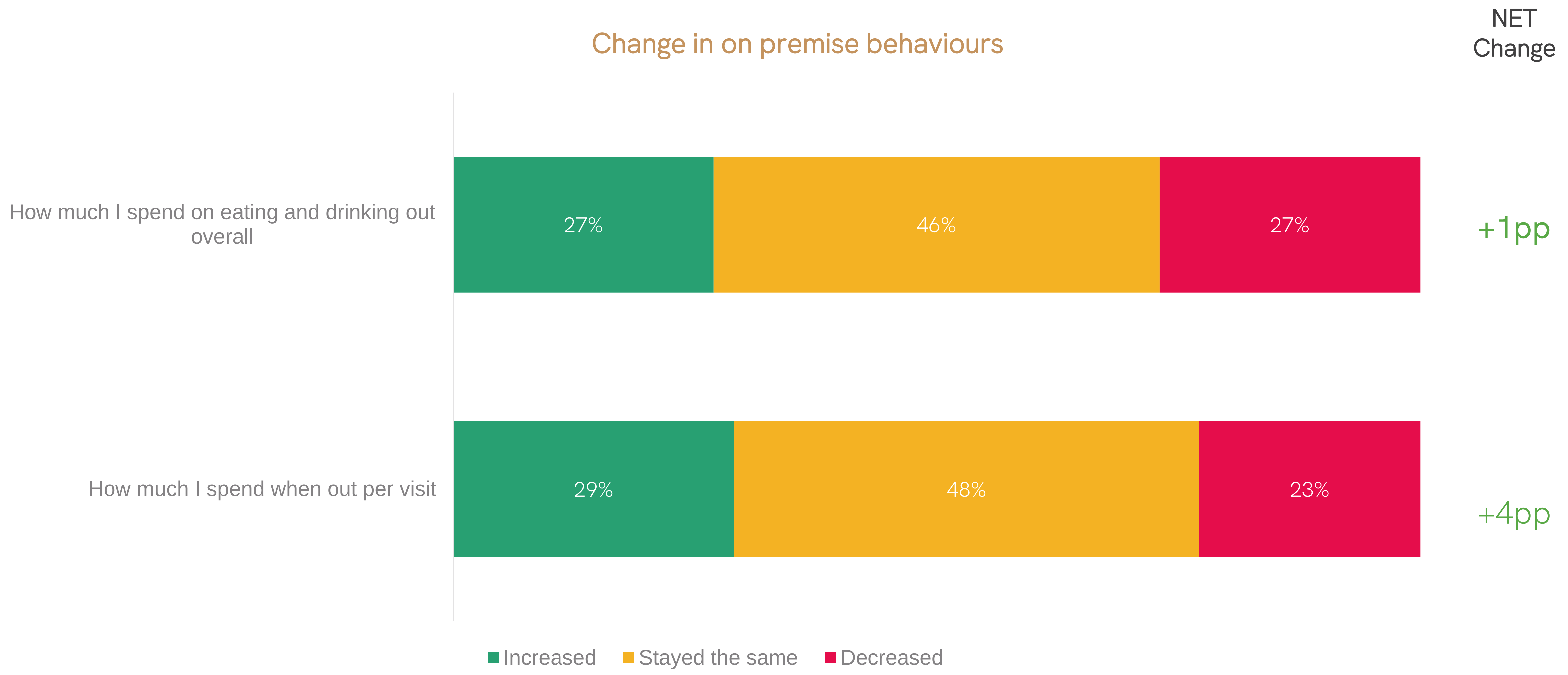
Frequency of planning to visit bars, restaurants or other similar venues over the next month



CGA Powered by NIQ

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2023 – SAMPLE: 998

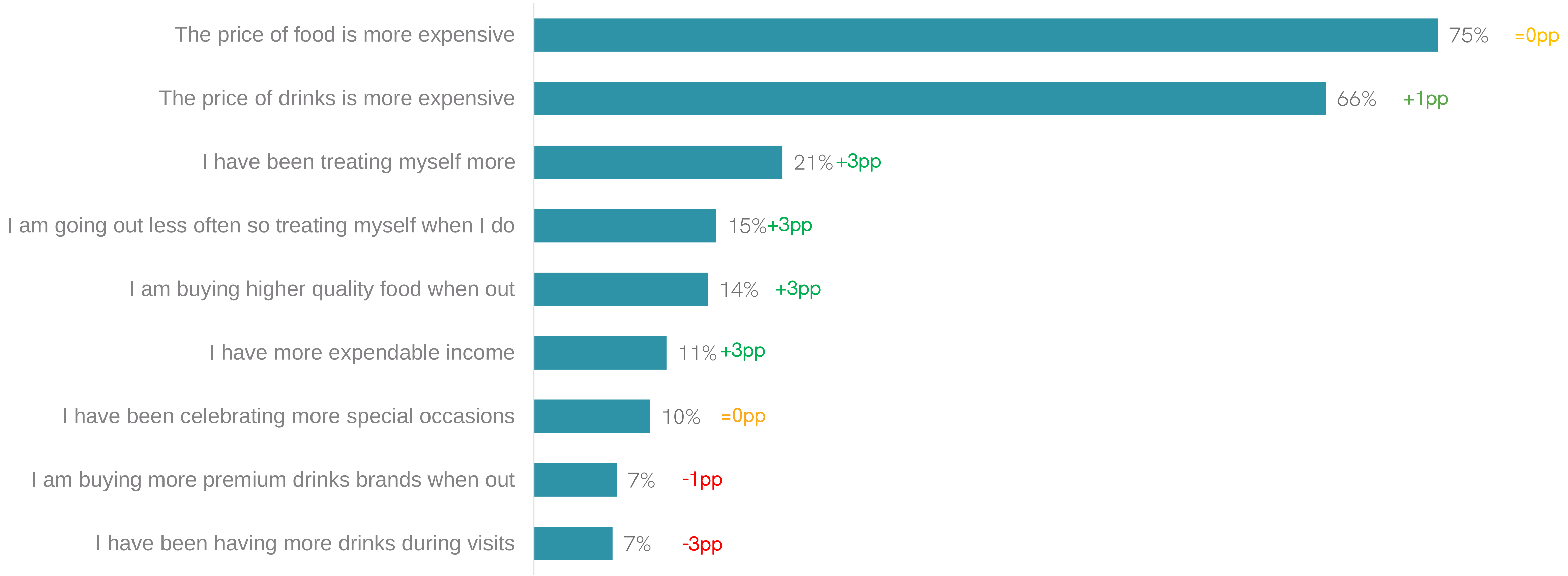
HAVE YOU CHANGED YOUR BEHAVIOUR IN ANY OF THE FOLLOWING WAYS OVER THE PAST MONTH, COMPARED TO USUAL, IN BARS, RESTAURANTS AND SIMILAR VENUES?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2023 – SAMPLE: 1001

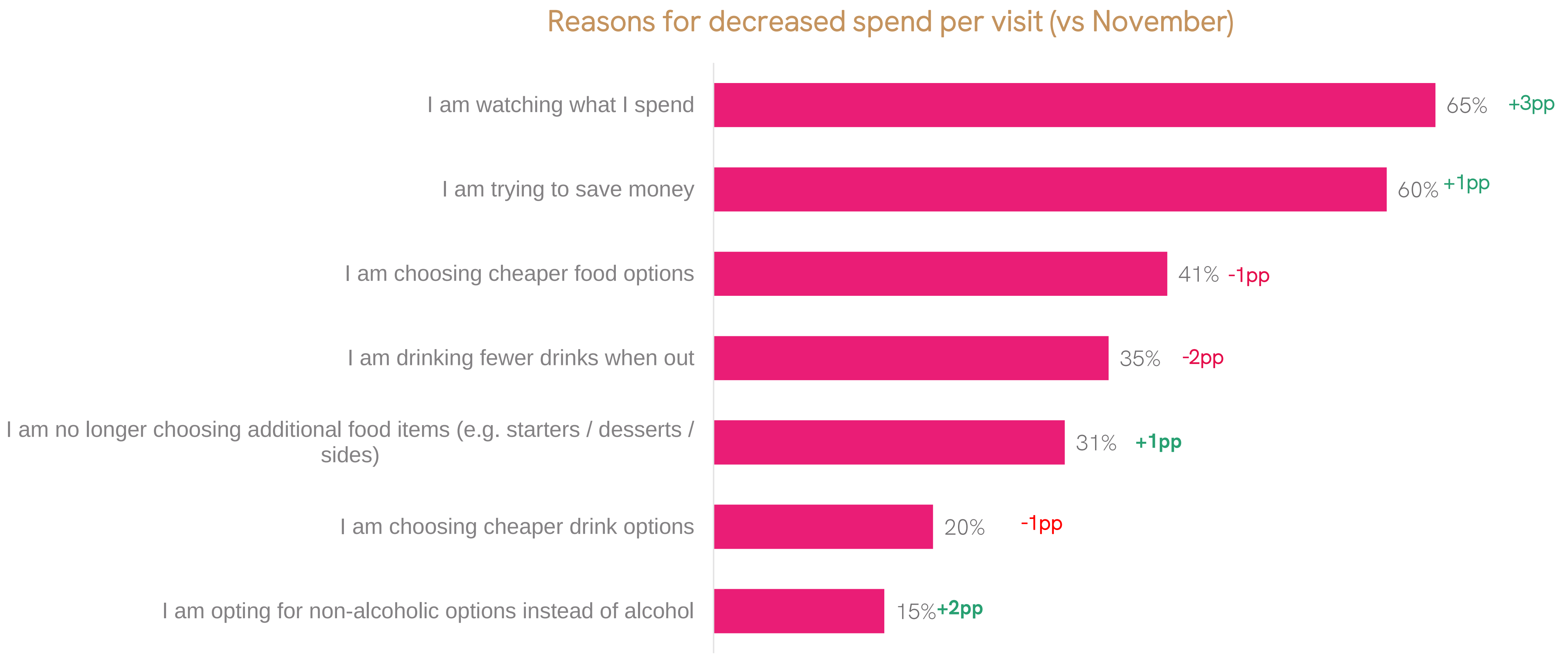
WHICH IF ANY OF THE FOLLOWING ARE REASONS WHY YOU ARE SPENDING MORE NOW WHEN OUT PER VISIT IN BARS, RESTAURANTS AND SIMILAR VENUES?

Reasons for increased spend per visit (vs November)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2023 – SAMPLE:, 288, 290

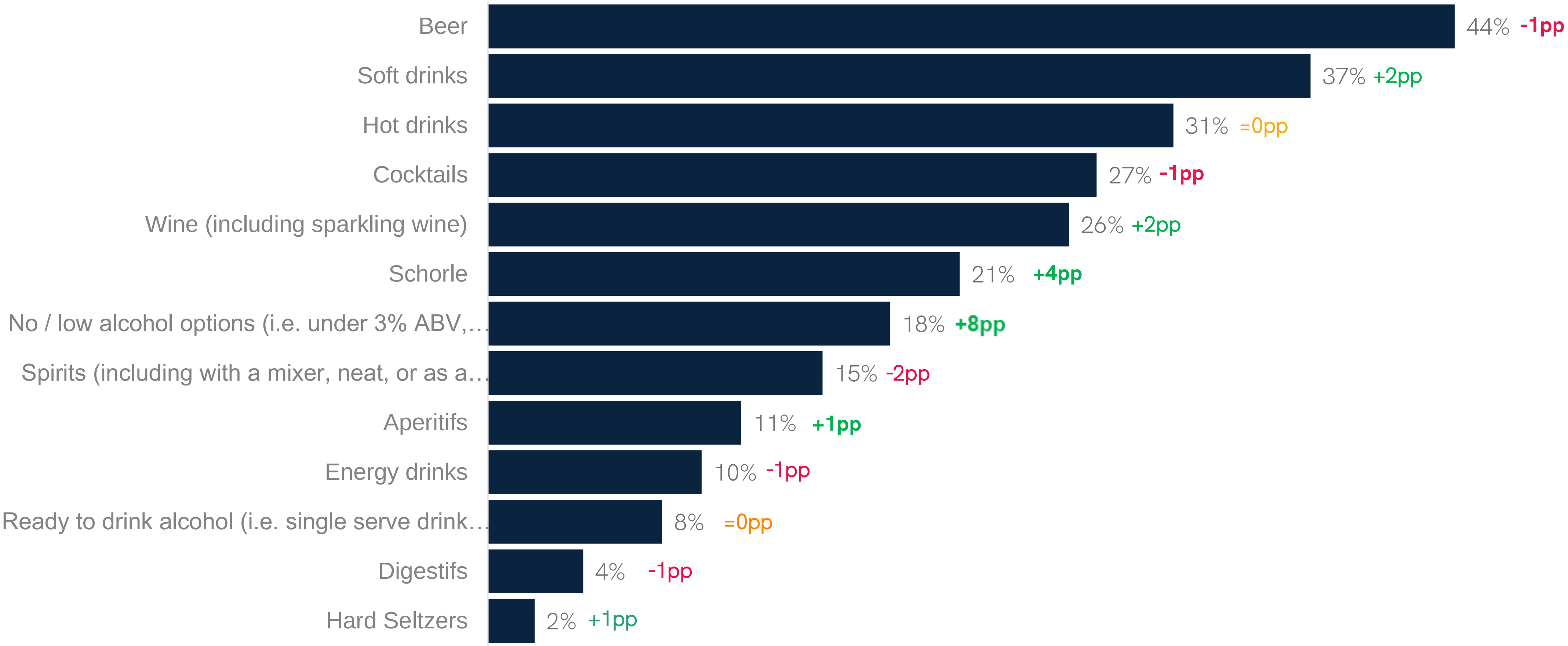
WHICH IF ANY OF THE FOLLOWING ARE REASONS WHY YOU ARE SPENDING LESS NOW WHEN OUT PER VISIT IN BARS, RESTAURANTS AND OTHER SIMILAR VENUES?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2023 – SAMPLE:, 229

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 November)

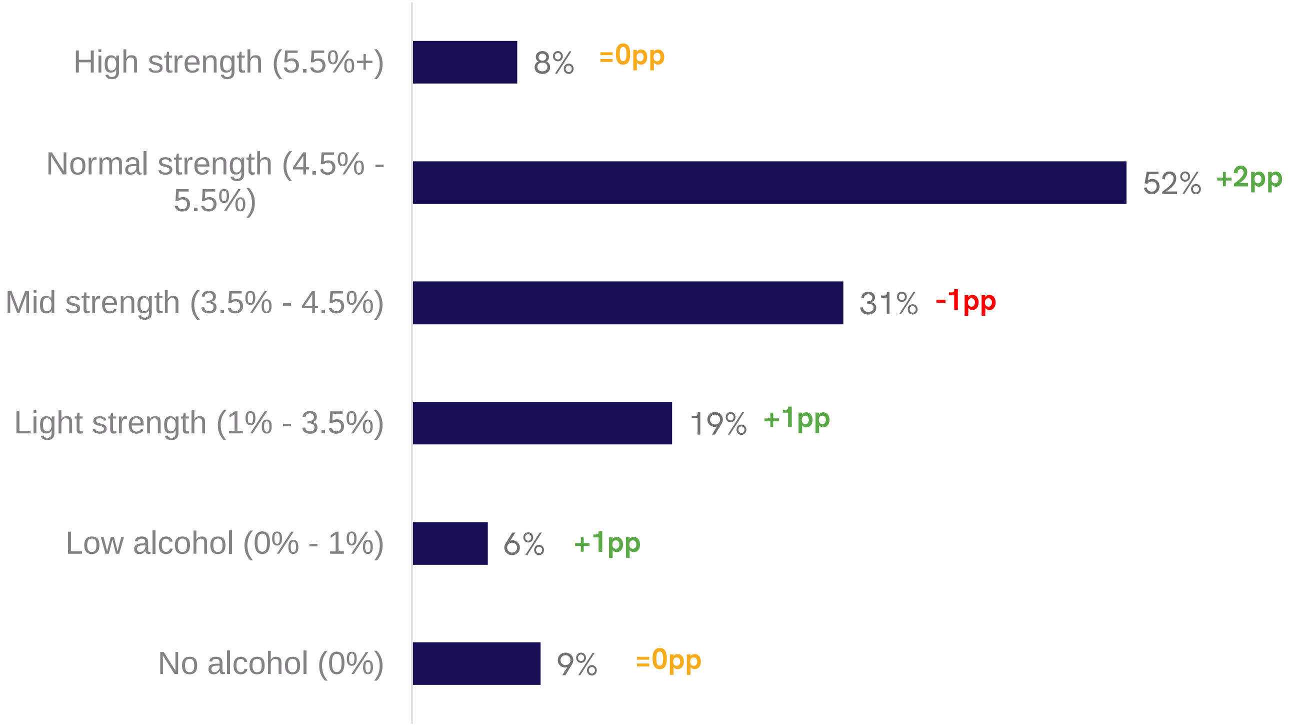


SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2023 – SAMPLE: 954

READY FOR QC

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

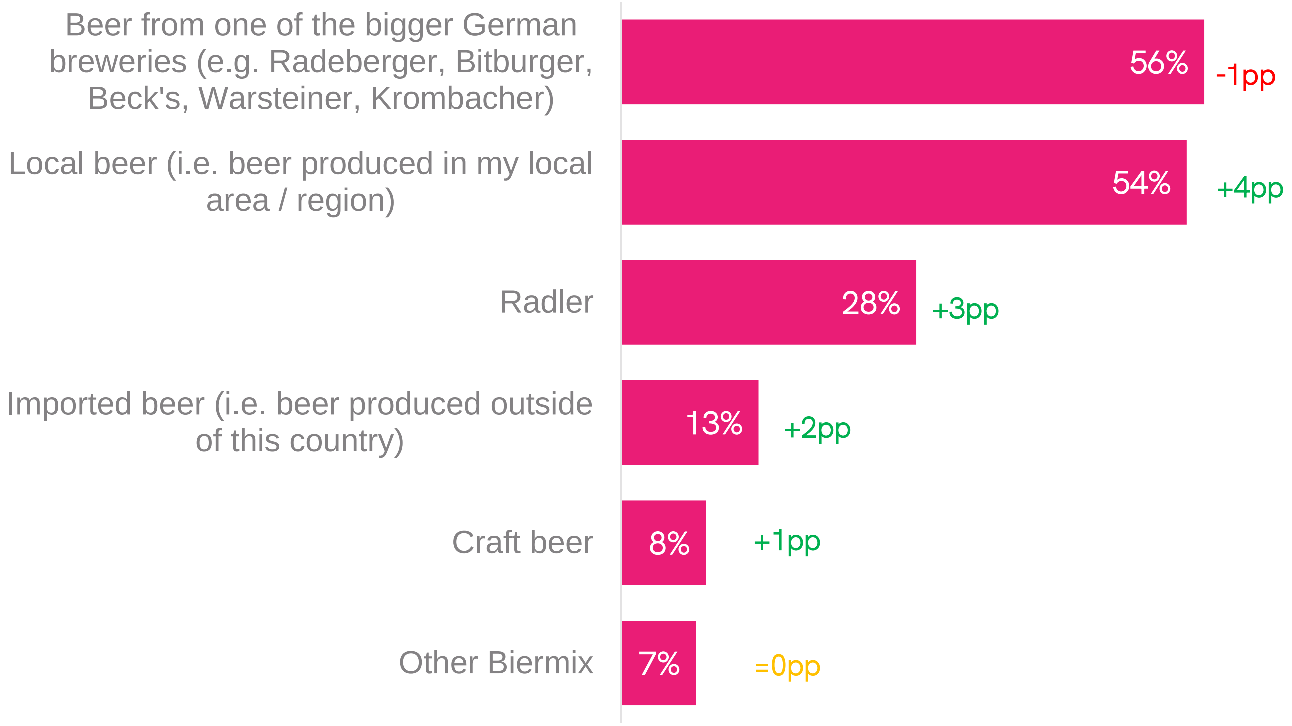
Strengths of beer consumers have drunk in the past month (vs average over past month)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT NOVEMBER 2023 – SAMPLE: 416

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 November)



Hot Topic – Looking ahead to 2024

CGA
Powered by NIQ

HOW OFTEN DO YOU PLAN TO GO TO VENUES IN 2024 COMPARED TO 2023?

Consumer's prognosis for their next year out of home consumption

14%
Going out more often

49%
Going out the same

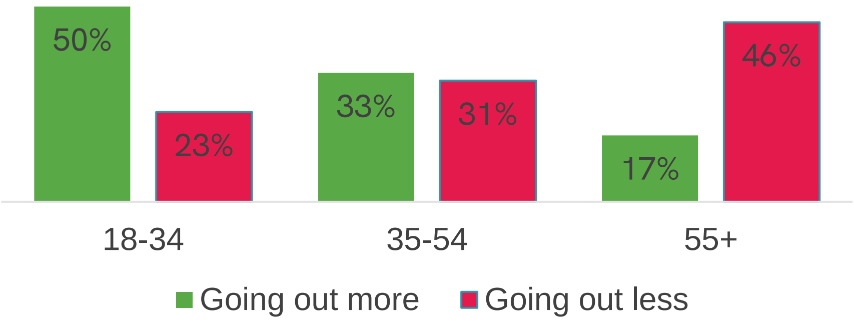
29%
Going out less often

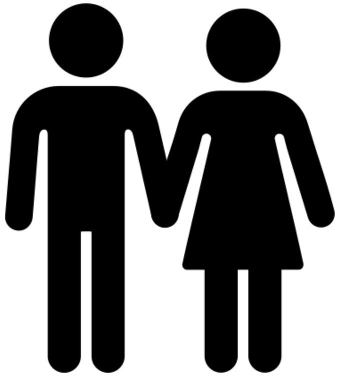
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2023 – SAMPLE: 1001

Consumers who plan to go out more next year are younger and typically live in city/town centres with higher incomes and higher frequency of on-premise visitation

Plans to go out more | Plans to go out less

Age groups





Gender

47% **53%**

46% **54%**

Location of residence

57% **42%**

City centre / town centre

43% **58%**

Rural / Suburban

Average household income

€43,875

€36,844

Typically visits the On-Premise at least once a week

55% **33%**

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2023 – SAMPLE: 284, 156

YOU HAVE SAID YOU ARE PLAN TO GO TO VENUES MORE OFTEN IN 2024. DO YOU PLAN ON VISITING ANY OF THE FOLLOWING MORE OFTEN?

Specific venues where consumers plan to increase their patronage for next year

Cafe	Casual dining restaurant	Restaurant	Bar / late night bar	Hotel	Night Club	International Pub
67%	46%	40%	40%	32%	30%	17%

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2023 – SAMPLE: 101

YOU HAVE SAID YOU ARE PLAN TO GO TO VENUES MORE OFTEN IN 2024. DO YOU PLAN ON GOING OUT FOR THE FOLLOWING OCCASIONS MORE OFTEN?

Drink Occasions for which consumers plan to go out more for the coming year

Special Occasions	Relaxed Quiet Drinks	Casual Meal	After Work Drinks	Formal Meal	High Tempo Drinks	To Watch Sports Live
58%	53%	48%	35%	31%	27%	22%

CGA Powered by NIQ

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2023 – SAMPLE: 139

WHICH IF ANY OF THE FOLLOWING, DO YOU PLAN TO PRIORATISE YOUR SPENDING ON OVER THE NEXT 12 MONTHS?

Consumers purchasing priorities for 2024

	Germany	France	Italy
International holidays	48%	15%	18%
Clothing	43%	10%	9%
Domestic holidays	34%	-5%	-5%
Day trips (including sport and leisure activities)	31%	10%	6%
Special occasion visits to pubs, bars restaurants and similar venues	26%	4%	5%
Home improvement	25%	-7%	-11%
Regular visits to pubs, bars, restaurants and other similar venues	24%	1%	-2%
Vehicles	18%	-1%	6%
Technology	17%	4%	-5%
Festivals	14%	4%	6%
Sporting events	11%	1%	-1%
Entertainment packages	10%	-16%	1%

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2023 – SAMPLE: 1001

Hot Topic – Health and moderation

DRY JANUARY IS THE CHARITY PROMOTED INITIATIVE WHICH INVOLVES REDUCING CONSUMPTION OR ABSTAINING FROM ALCOHOL FOR THE MONTH. DO YOU PLAN TO TAKE PART?

Intentions for taking part in Dry January

27%

of consumers plan to stop drinking completely

+10PP 18-34

-12PP 65+

28%

of consumers plan to reduce their alcohol consumption

+9PP 18-24

+5PP 25-44

-8PP 55-64

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2023 – SAMPLE: 1001

CGA Powered by NIQ

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

Change in frequency of visitation

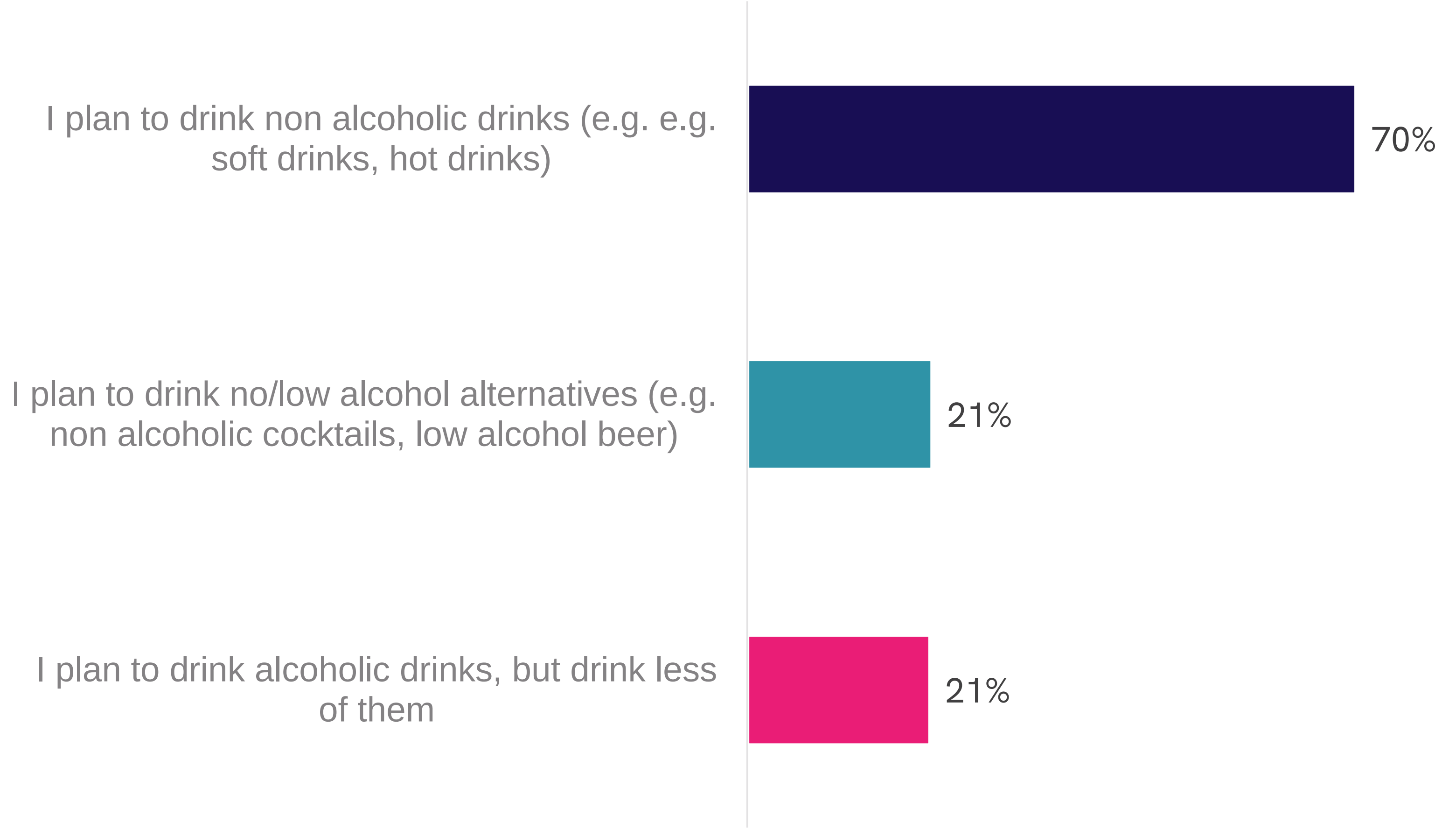
10%	27%	47%
Going out more often	Going out the same	Going out less often

16% Not visit venues at all

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT NOVEMBER 2023 – SAMPLE: 545

DURING DRY JANUARY WHICH IF ANY OF THE FOLLOWING DO YOU PLAN TO DO?

Consumer's approaches to reduce their alcohol consumption at the start of the new year



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2023 – SAMPLE: 447

73%

Of consumers agree they will prioritize health and wellbeing for 2024

+13pp

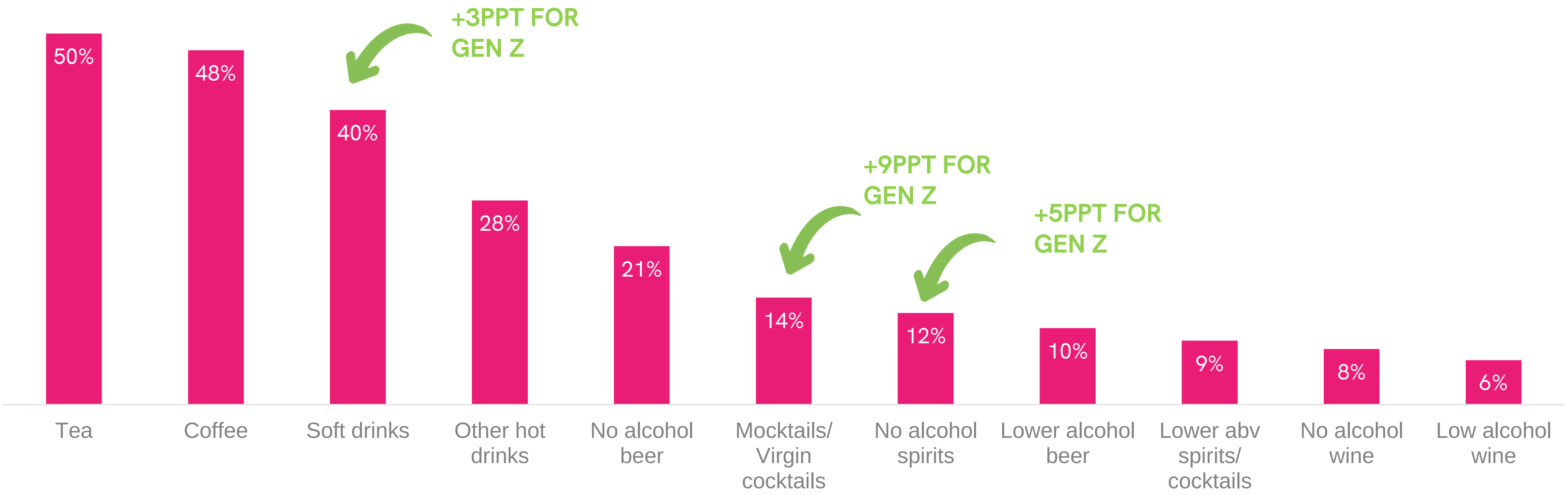
For gen z

53%

Of consumers agree they will regulate their alcohol consumption throughout the year

You have said you are planning to moderate the amount of alcohol you drink or want to prioritise your health and wellbeing in 2024. Do you plan to drink any of the following more in 2024?

Main substitutes for alcohol consumption amongst health-conscious consumers



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT DECEMBER 2023 – SAMPLE: 532

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.

CGA Powered by NIQ

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 see's 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

CGA Powered by NIQ