

A background image showing a group of people at a social gathering, holding and clinking glasses of refreshing drinks. The drinks are garnished with lime slices and mint leaves. The scene is set outdoors with greenery visible in the background.

GERMANY ON PREMISE CONSUMER PULSE REPORT

CGA by NIQ, September 2025

NIQ



Occasionality shifts during September

Seasonal slowdown is evident, but YoY trend offers mild optimism

Consistent On Premise visitation

September's visitation rates are tainted by the end of summer holidays, resulting in a drop in On Premise visitation compared to the previous period. However the year on year comparison shows a consistent performance with a modest growth for drink-led outings.

Food-led occasions continue to anchor consumer behaviour. Brands should prioritise visibility in these outlets to maintain reach and relevance.

Drink category perception

Cocktails (+3pp), Beer (+2pp) and Schorle (+2pp) show growth while other categories struggle. Whilst the excitement factor could be a driver behind Cocktails performance, the Beer category receives top marks for it's overall serve quality. However, value for money is still a key driver and should be kept in mind.

Understanding consumer behaviour and their perception of categories is more important than ever and offers brands a clear path to influence choice and drive trial.

Visitation rates

95% of consumers have visited the On Premise in September, with 21% showing an optimistic outlook for future visitation frequency. There is still as shift towards Saturday visitation, however Sunday is loosing traction.

To drive more frequent visits, brands and operators must create compelling reasons to return. Whether through promotions, experiences or product discovery.

Consumers behaviour around healthy choices

Healthy alternatives are gaining traction across food and drink occasions

Growing interest in healthier options

Nearly 1 in 3 consumer are choosing healthy alternatives more often than last year with only a fraction (9%) turning away from healthy options. The majority of German consumer (42%) choosing both, healthy food and drink options when visiting the On Premise.

This signals a clear shift in priorities. With healthy choices becoming more mainstream, operators should consider how to balance menus to cater to both food and drink health preferences.

Drink choice

The most popular healthy drinks are low sugar drinks (36%), alcohol free alternatives (34%) and low calorie drinks (30%).

However, those categories are also the top choices of what consumer would like to see more of. Highlighting the importance of visibility in the On Premise.

There is a clear opportunity for suppliers to expand offerings in these categories with functional drinks and plant-based options remaining niche but showing potential for growth.

Venue type

Healthy drinks are most commonly consumed in casual dining restaurants (55%), Café's (42%) and Bars (27%), whilst Nightclubs (10%) and Food markets / halls (13%) form the least popular choices

Manufacturers must target these venues with tailored healthy offerings, and work together with operators and venues to ensure visibility within outlets, drive uptake and brand loyalty.



CGA'S MONTHLY CONSUMER PULSE

- This monthly On-Premise Consumer Pulse report is intended to capture consumers consumption patterns and how they fluctuate in the transition period from August 2025 to September 2025 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 **September 2025** issue, we surveyed 1000 consumers (aged 18+) between the 17th – 23rd September 2025. These consumers were situated across all German regions and must typically visit On Premise venues at least once within a 3-month period.

Key metrics & On Premise visitation



LOOKING BACK



89%

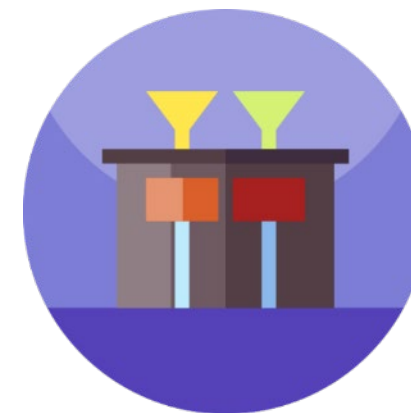
of consumers have been out
to eat in the previous month

+1pp vs September last year

48%

of consumers have been out
for a drink in the previous month

+2pp vs September last year



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT SEPTEMBER 2024, 2025 – SAMPLE: 1000, 1003

NIQ



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LOOKING BACK

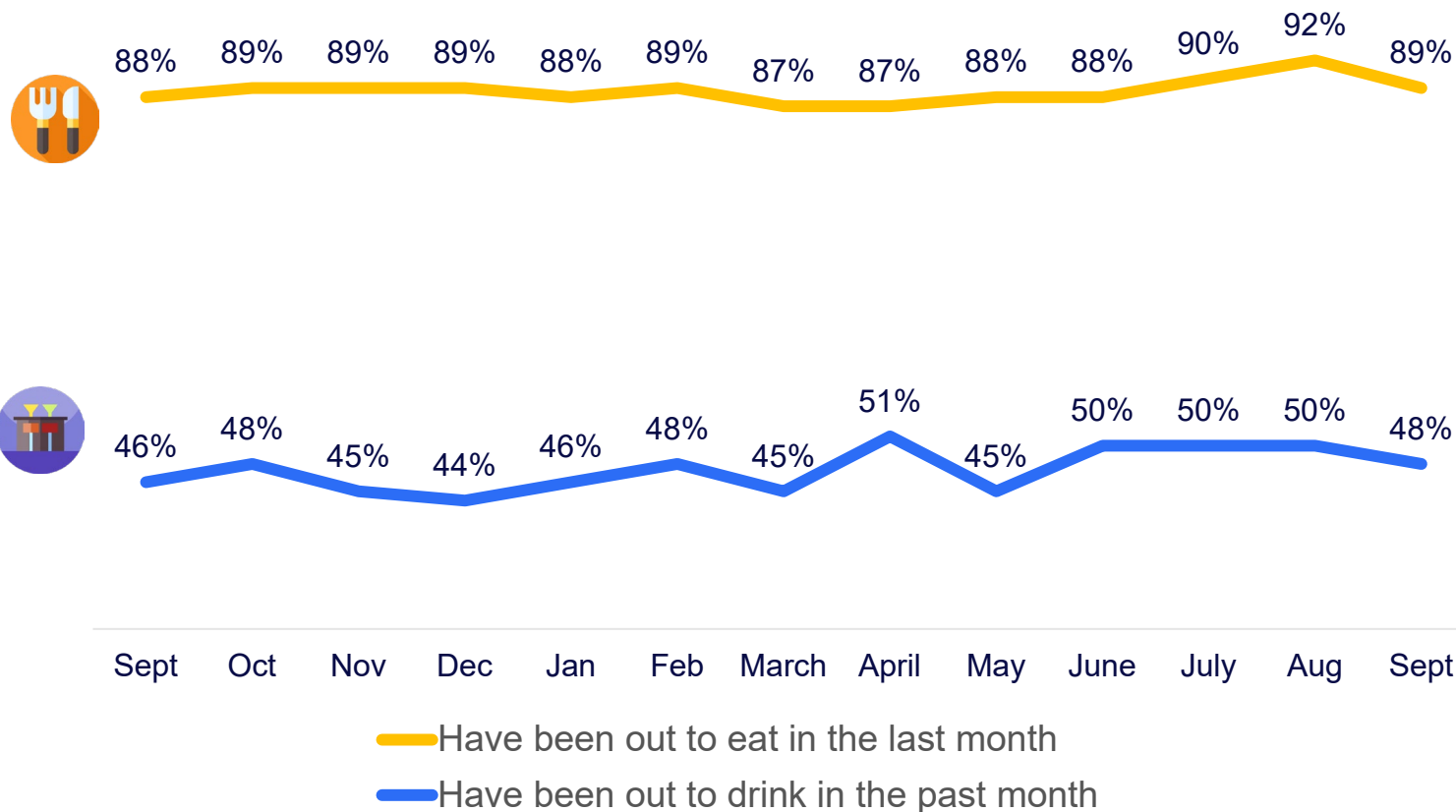


**95% of consumers visited the
On Trade this month**

=0pp vs September last Year

FREQUENCY VISITING THE ON PREMISE OVER THESE LAST MONTHS

Yearly visitation rates to the On Premise



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT SEPTEMBER 2025, 2024 – SAMPLE: 1000, 1003

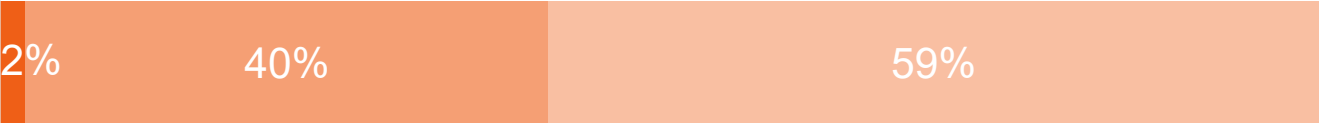
HOW OFTEN HAVE YOU VISITED BARS, RESTAURANTS AND SIMILAR VENUES OVER THE PAST MONTH?

Frequency visiting On Premise in the past month

Everyday / almost everyday Weekly Monthly



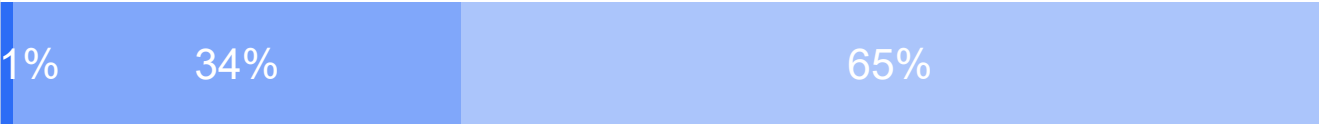
Overall



-1pp vs September last year -1pp vs September last year +2pp vs September last year



To Drink



To Eat



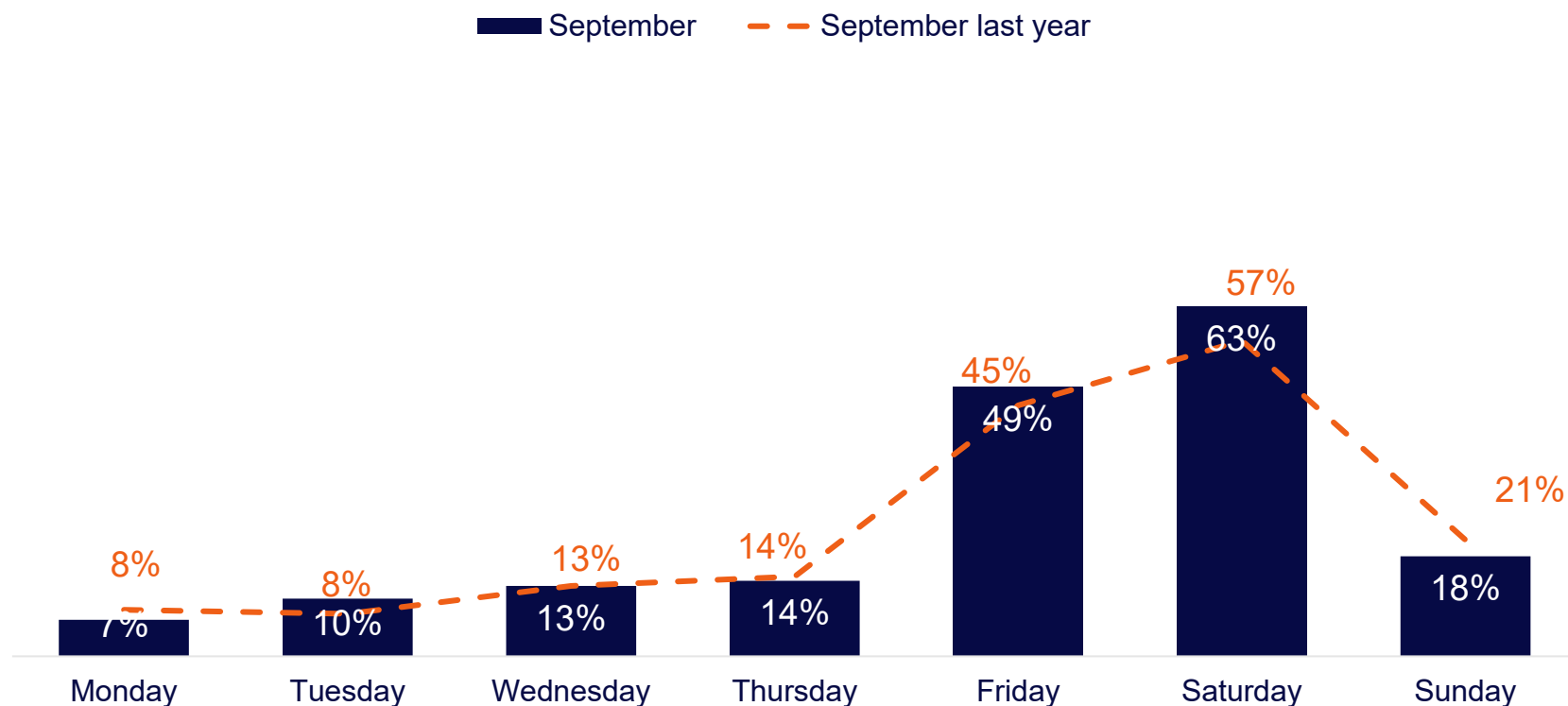
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT SEPTEMBER 2024, 2025 – SAMPLE: 481- 951





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

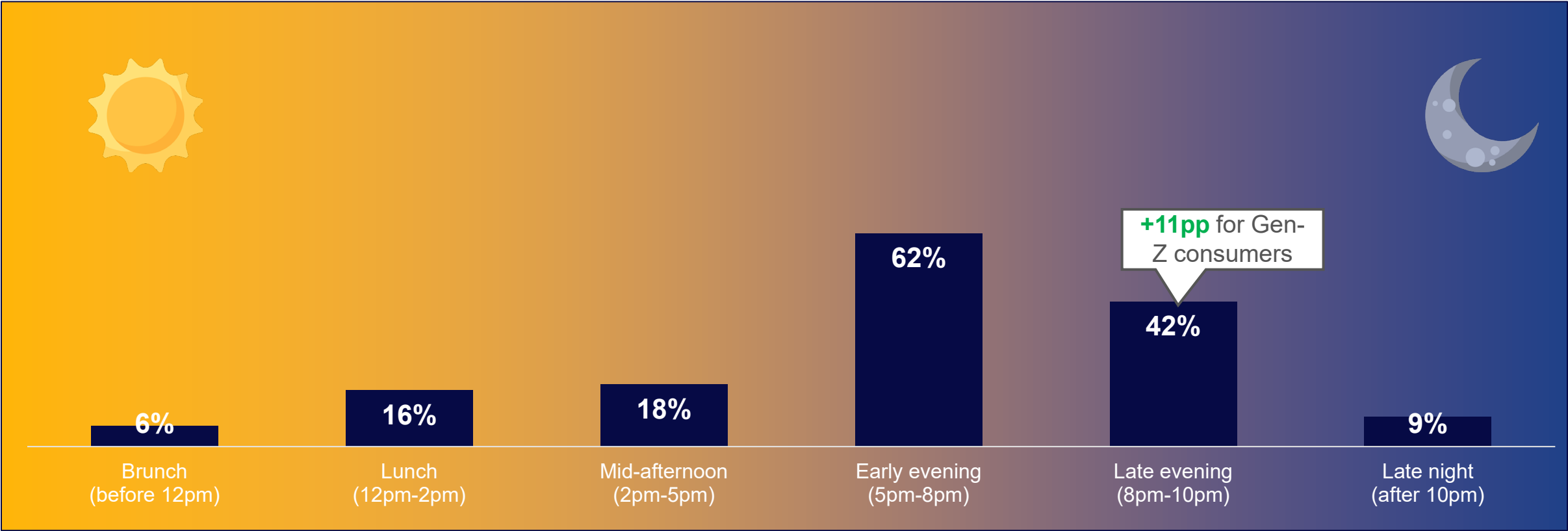
Day of the week visiting the On Premise



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT SEPTEMBER 2024, 2025 – SAMPLE: 950 - 951

WHAT TIMES OF DAY HAVE YOU BEEN VISITING BARS, RESTAURANTS AND SIMILAR VENUES OVER THE PAST MONTH?

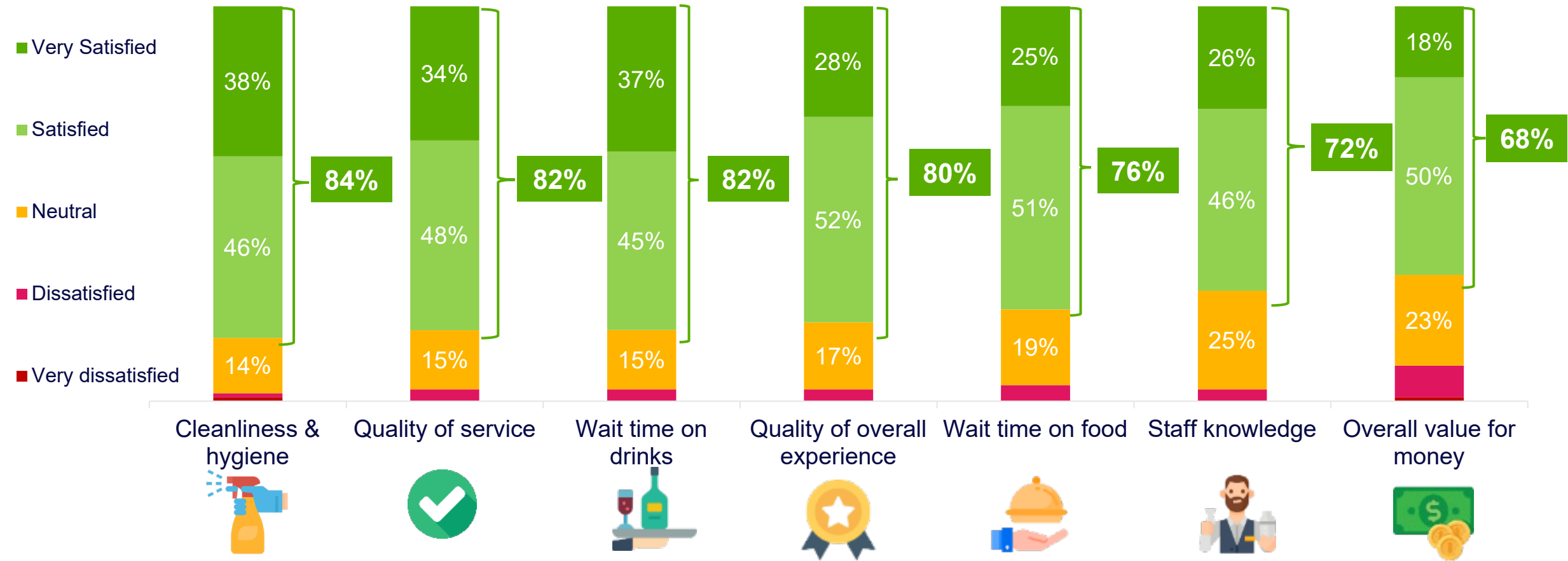
Time of day for visiting the On Premise



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT SEPTEMBER 2025 – SAMPLE: 178, 947

SATISFACTION WITH MOST RECENT VISIT TO THE ON PREMISE

Proportion of consumers very satisfied/satisfied with...

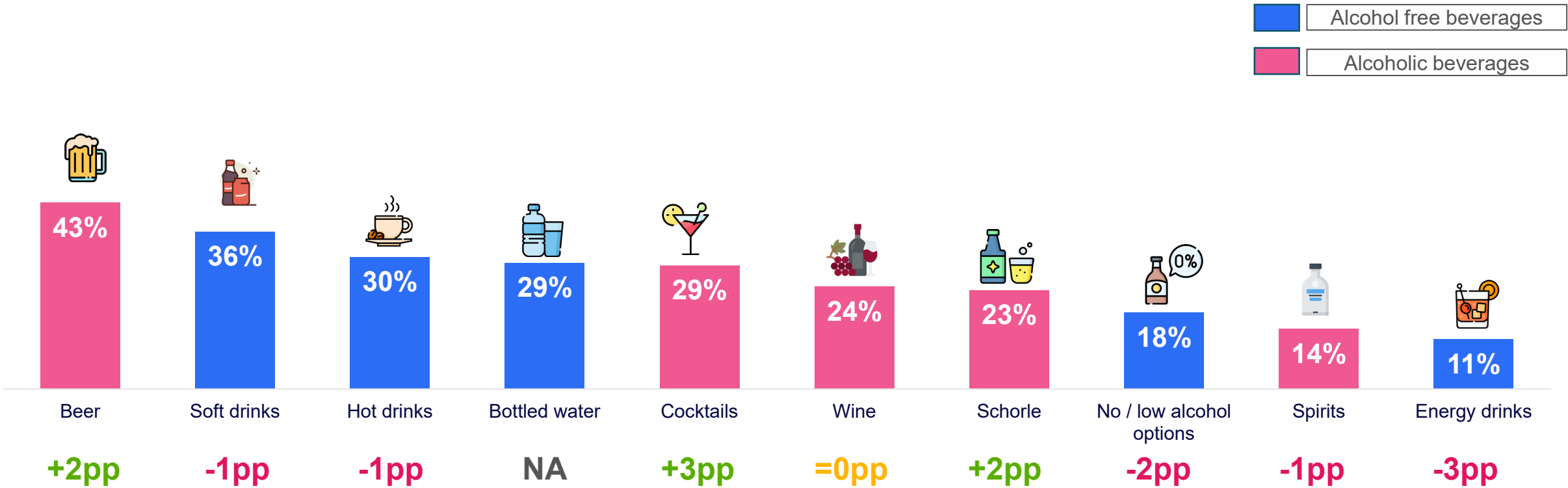


SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT SEPTEMBER 2025 – SAMPLE: 888 - 1000

Key Metrics: Categories Drunk

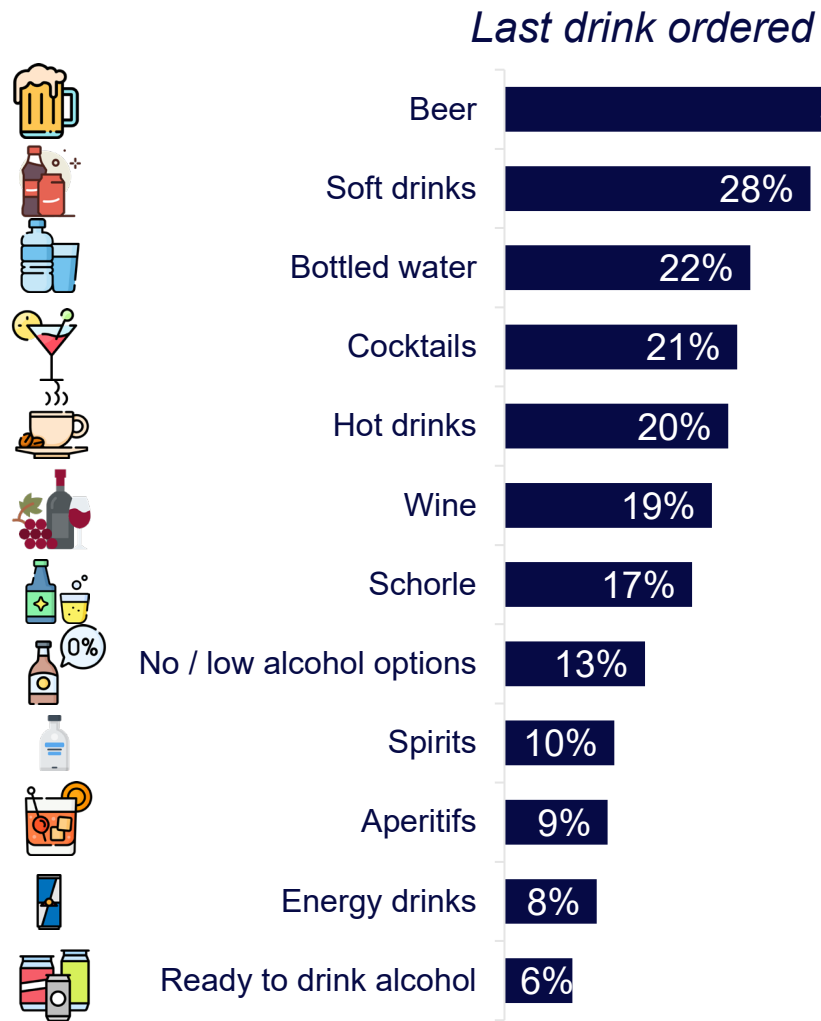


WHICH OF THE FOLLOWING DRINKS HAVE YOU DRANK IN BARS AND/OR RESTAURANTS IN THE PAST MONTH?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT SEPTEMBER 2024, 2025 – SAMPLE: 950, 951

THINKING ABOUT **YOUR MOST RECENT VISIT TO A BAR, RESTAURANT OR SIMILAR VENUE, WHICH OF THE FOLLOWING CATEGORIES DID YOU DRINK?**

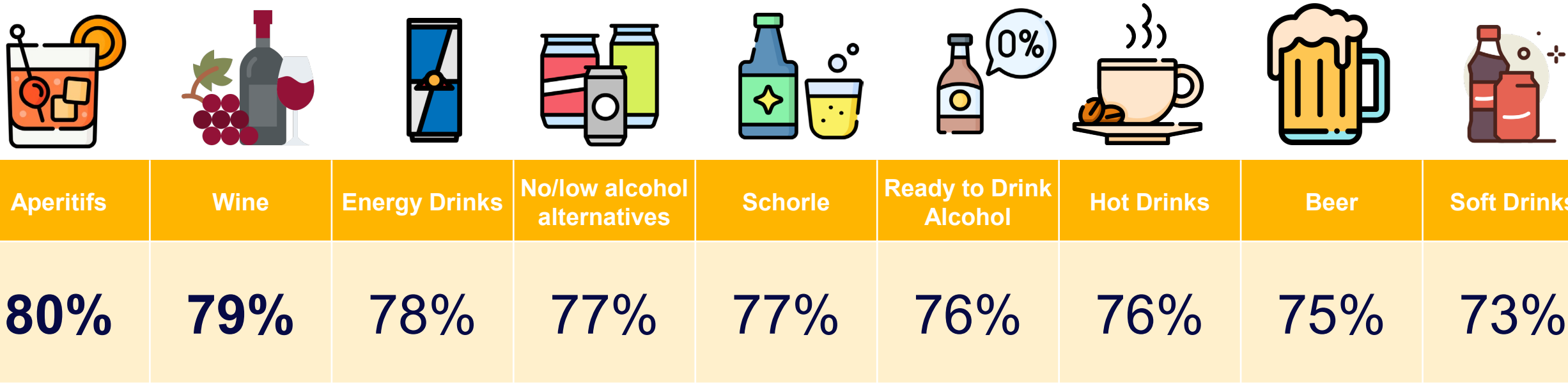


SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT SEPTEMBER 2025 – SAMPLE: 1000

HOW SATISFIED WERE YOU WITH THE DRINK(S) THAT YOU HAVE HAD ON YOUR MOST RECENT VISIT REGARDING ITS VALUE FOR MONEY?

Shown to individual drink category consumer on latest visit

% very satisfied / satisfied with value for money 



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT SEPTEMBER 2025 – SAMPLE: 62 - 363

HOW SATISFIED WERE YOU WITH THE DRINK(S) THAT YOU HAVE HAD ON YOUR MOST RECENT VISIT REGARDING HOW EXCITING IT WAS?

Shown to individual drink category consumer on latest visit
% very satisfied / satisfied with how exciting the drink was 🤩



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT SEPTEMBER 2025 – SAMPLE: 62 - 367

HOW SATISFIED WERE YOU WITH THE DRINK(S) THAT YOU HAVE HAD ON YOUR MOST RECENT VISIT REGARDING ITS **QUALITY OF SERVE?**

Shown to individual drink category consumer on latest visit
% **very satisfied** / **satisfied** with **The overall quality of the serve** 

								
Beer	No/low alcohol alternatives	Cocktails	Wine	Hot Drinks	Spirits	Soft Drinks	Bottled Water	Schorle
89%	87%	87%	87%	85%	85%	84%	84%	83%

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT SEPTEMBER 2025 – SAMPLE: 62 - 367



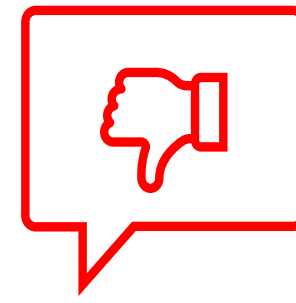
HAVE YOU TRIED A NEW DRINK WHEN EATING OR DRINKING OUT OVER THE PAST MONTH?



35%

Yes

+40pp for GenZ
Consumer



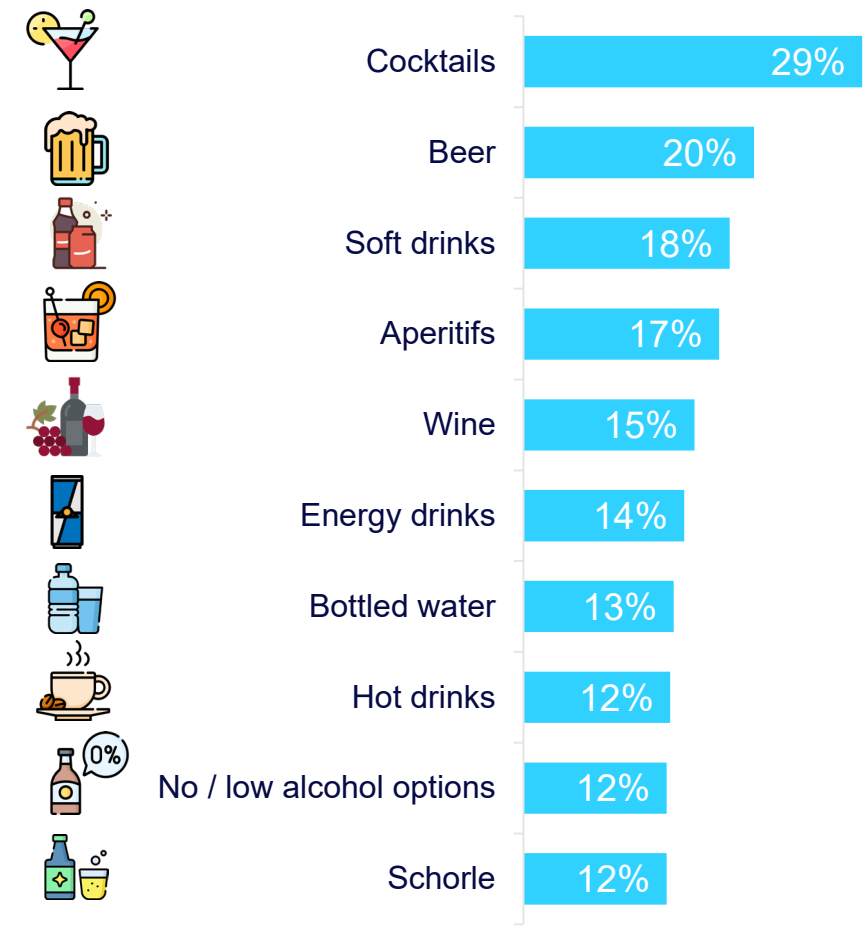
65%

No

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT SEPTEMBER 2025 – SAMPLE: 178- 951

WHICH OF THE FOLLOWING CATEGORIES WAS THE NEW DRINK THAT YOU TRIED?

New drinks tried by those going out for food and drinks | Top 10



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT SEPTEMBER 2025 – SAMPLE: 337

Key Metrics: Next Month Prognosis





72%

of consumers plan to go out
to eat in the next month

41%

of consumers plan to go out
for a drink in the next month



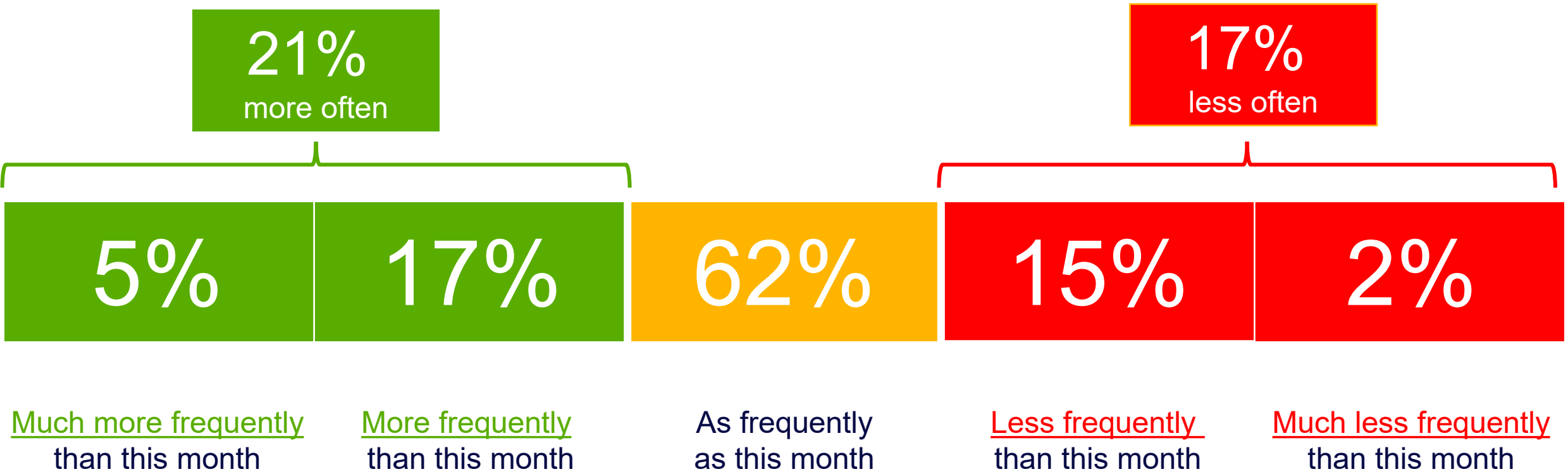
LOOKING FORWARD



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT SEPTEMBER 2025 – SAMPLE: 996

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

Asked to those planning to visit the On Premise in the next month



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT SEPTEMBER 2025 – SAMPLE: 882

Hot Topics: Healthy alternatives

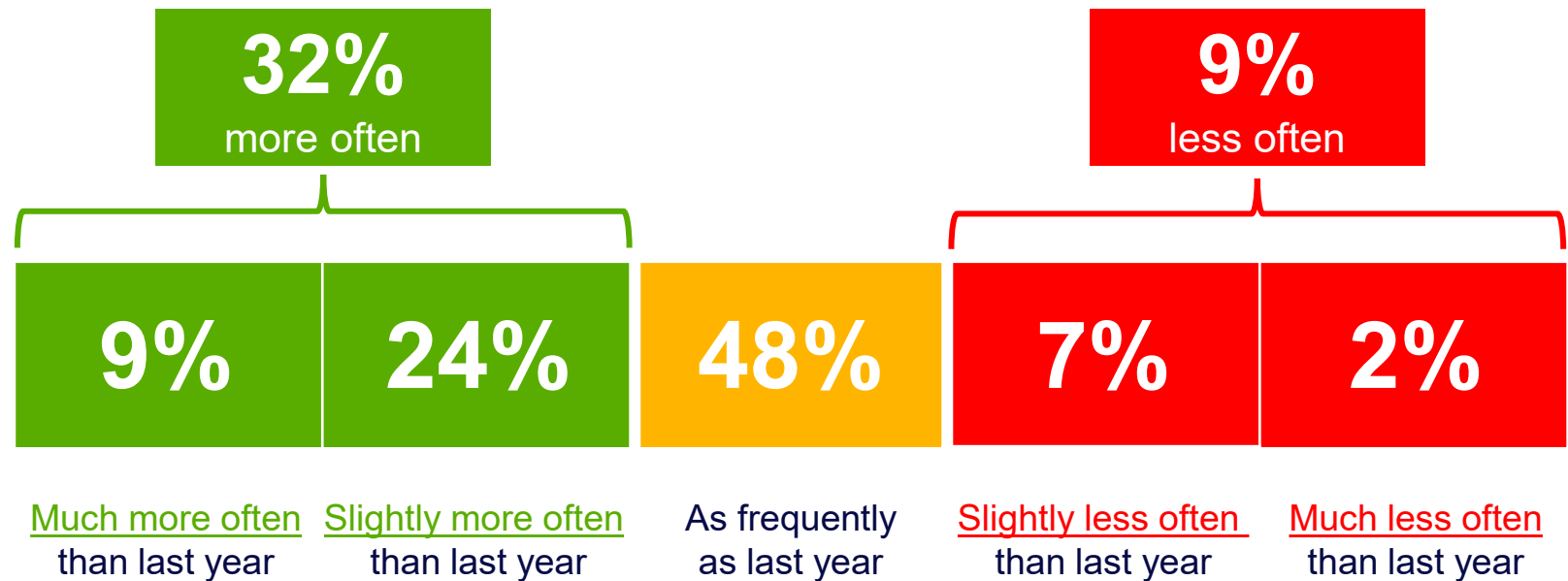


COMPARED TO LAST YEAR, HOW OFTEN DO YOU CHOOSE HEALTHY ALTERNATIVES WHEN OUT IN BARS, RESTAURANTS OR SIMILAR VENUES?

Frequency consumers choose healthy alternatives vs last year

11%

Of consumers **don't choose healthy alternatives** when out



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT SEPTEMBER 2025 – SAMPLE: 1000

WHICH TYPES OF HEALTHY ALTERNATIVES DO YOU TYPICALLY CHOOSE IN BARS, RESTAURANTS OR SIMILAR VENUES?



42% choose healthy alternatives **for both food and drinks**



38% choose healthy alternatives **for food**



20% choose healthy alternatives **for drinks**

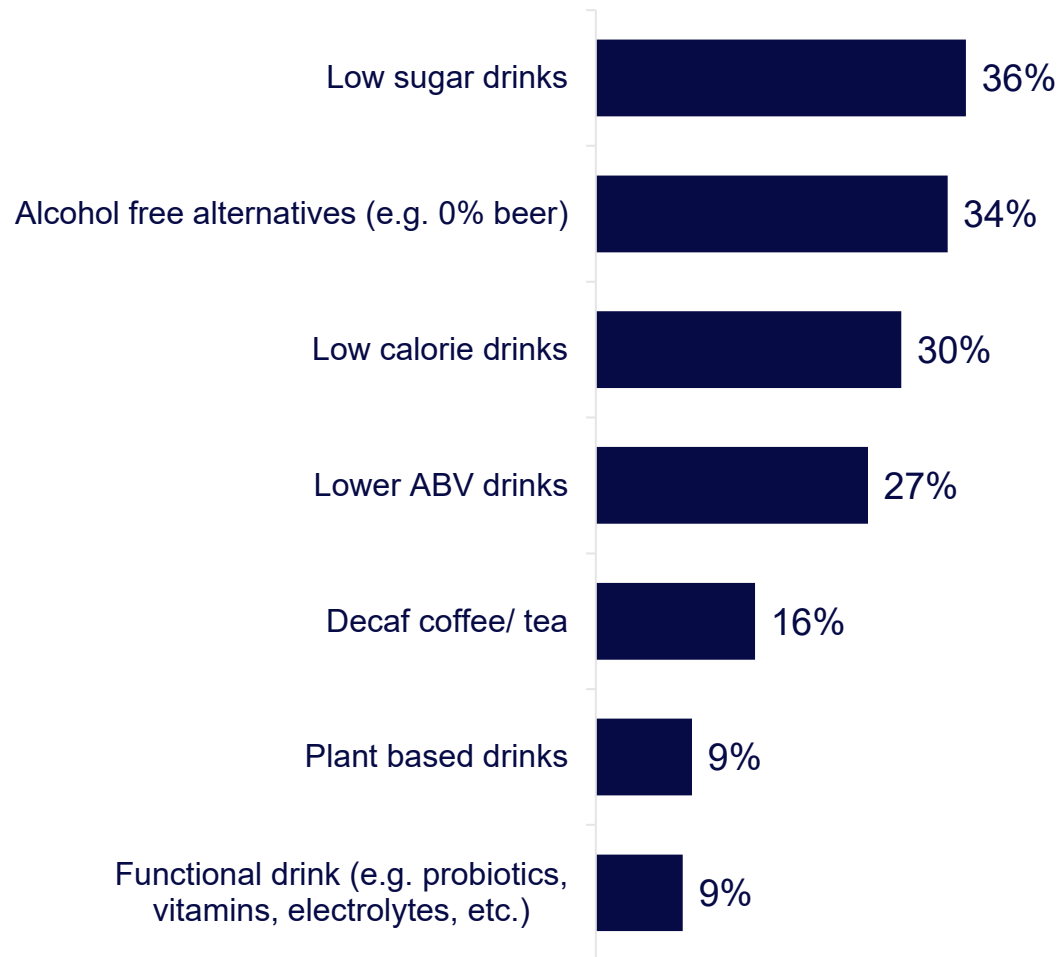
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT SEPTEMBER 2025 – SAMPLE: 888





WHICH OF THE FOLLOWING HEALTHY DRINKS DO YOU DRINK IN BARS, RESTAURANTS OR SIMILAR VENUES?

Healthy drink drunk when out

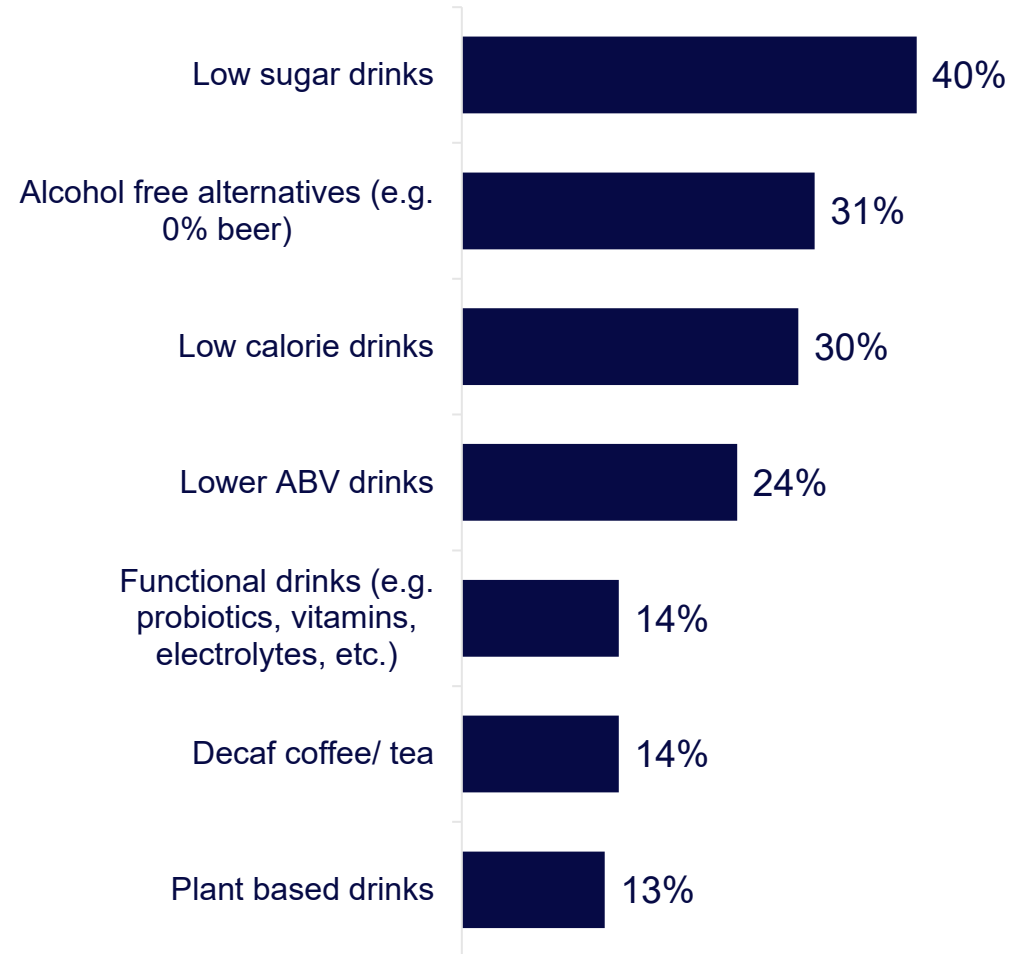


SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT SEPTEMBER 2025 – SAMPLE: 552



AND WHAT TYPES OF HEALTHY DRINKS WOULD YOU LIKE TO SEE MORE OF IN THESE VENUES?

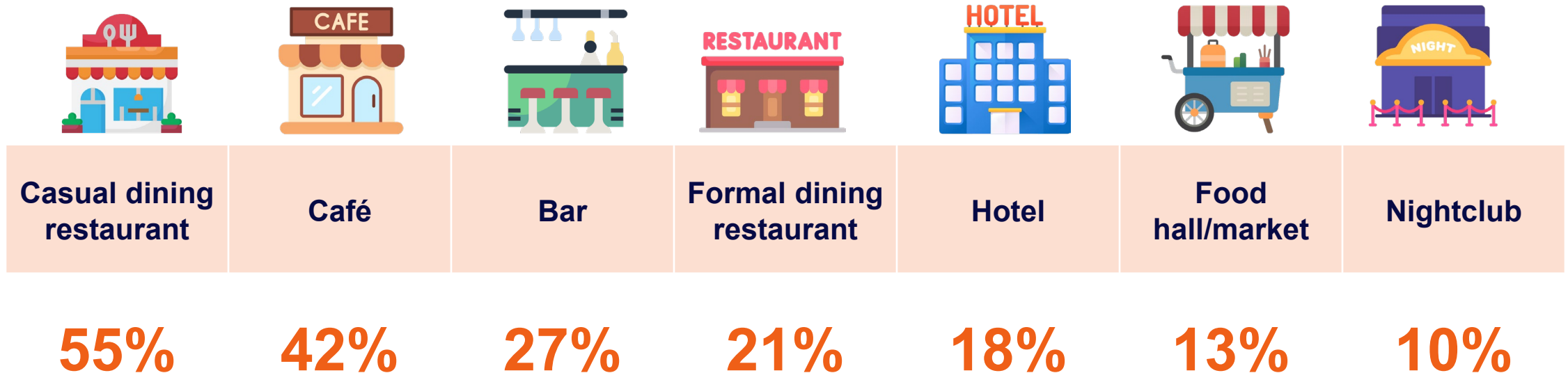
Healthy drink sought after



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT SEPTEMBER 2025 – SAMPLE: 552

WHERE DO YOU TYPICALLY CHOOSE TO DRINK HEALTHY DRINKS?

Venues where healthy drinks are mainly drunk



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT SEPTEMBER 2025 – SAMPLE: 552

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CGA: Consumer Tools

Additional Consumer Reporting where CGA by NIQ's expertise can be leveraged



Custom RFP Support Decks

Take group-specific sales stories to your national account customers to speak to their consumers and showcase how your portfolio aligns with their strategies



Optimum Assortment

CGA's assortment tool allows you to enable your teams to showcase the optimal range for outlets and highlight where brands should be placed within a range to achieve highest sales and increase customer satisfaction



Path to Purchase

Understand the decision corridor consumers go through when purchasing products, and identify how these choices impact the decisions that result in final sales



Consumer Segmentation

Strategically and effectively target specific On Premise drinkers to identify offerings and opportunities that relate to them, ensuring \$ are spent more effectively in On Premise brand building



Custom Research

From online surveys to focus groups and in-outlet intercepts, CGA has access to millions of consumers across the world to answer your most important questions



Bartender Research

Bartenders and servers are the final touch point of influence in the channel. With such change, understanding advocacy and bartender needs is extremely important in influencing the sales of your products

Find out how to build a successful On Premise strategy

For more information on how CGA by NIQ can help your business grow in the German On Premise, get in touch:



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