

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 fresh mint leaves. The scene is set outdoors with greenery visible in the background.

FRANCE ON PREMISE CONSUMER PULSE REPORT

CGA by NielsenIQ, May 2026

NielsenIQ

powered by **CGA** intelligence

Overview of On Premise visitation during May

A momentum driven by good weather, but with fragile visit frequency

Visitation

Visitation to On Premise venues clearly benefits from a positive seasonal effect: with the arrival of good weather, going-out occasions are rising again, both for eating out and for having a drink.

However, this momentum is tempered by a decline in frequency: consumers continue to go out, but less regularly, reflecting an arbitration logic rather than disengagement.

In this context, On Premise operators need to capitalise on each visit, especially as some categories are performing better than others: while beer remains the dominant choice in volume, wine stands out with a high level of satisfaction, revealing strong potential for experience premiumisation.

Encouraging outlook

This momentum could intensify in the coming weeks: intentions are trending upward, with a positive balance of consumers planning to increase their going-out frequency (+2 pp).

This is a key signal which, combined with the summer season, confirms a favourable yet competitive environment. With frequency still fragile, the challenge for operators will be to activate the right levers to turn this intention into concrete and repeated visits, by capitalising on differentiated experiences and a drinks offer capable of balancing volume drivers (beer) with satisfaction/premiumisation levers (wine/cocktails).



Consumer behaviours during the World Cup

A social-experience lever that turns match time into extended business opportunities.

A social event lived in On Premise venues

The World Cup stands out as a major collective moment: **3 out of 4 French people plan to follow it**, and among them, **38% expect to watch matches in the On Premise**.

This choice is primarily driven by the search for **atmosphere and shared experience**, where the venue becomes a true **amplifier of emotions**.

This experiential aspect is even more critical as venues able to **stage the event** - through themed evenings or dedicated menus - succeed in turning interest into **actual visits**.

High-potential business moments

This attractiveness grows as the competition progresses, peaking during the final stages, when **nearly 3 out of 4 consumers plan to go out**: a critical momentum where everything is at stake.

And the experience doesn't start at kick-off: **more than half of customers arrive at least one hour early**, offering a strategic window to activate offers, especially around **core drinks categories** (beer, cocktails, soft drinks), which are the pillars of match-time consumption.

A long time window, extending beyond the match

Finally, the dynamic doesn't drop at the final whistle: **one in two consumers stays 1 to 2 hours after the match**.

This extension confirms that the opportunity goes **beyond the sport itself**, fitting into a **full-evening experience**.

For operators, this opens a **double opportunity**: capturing demand **before** the match thanks to the waiting period, and maximising value **after** the match by extending the experience.



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 April to May 2025 in France.
- 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 **May 2025** issue, we surveyed 750 consumers (aged 18+) between May 18th – 22th 2025. These consumers were situated across all French regions and must typically visit On Premise venues at least once within a 3-month period.

Key metrics & On Premise visitation



LOOKING BACK



87%

of consumers have been out to eat in the previous month

+1pp vs May last year

+7pp for Parisians

53%

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

-1pp vs May last year

+5pp for Parisians

+1pp for Gen-Z



Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 153 - 751

LOOKING BACK

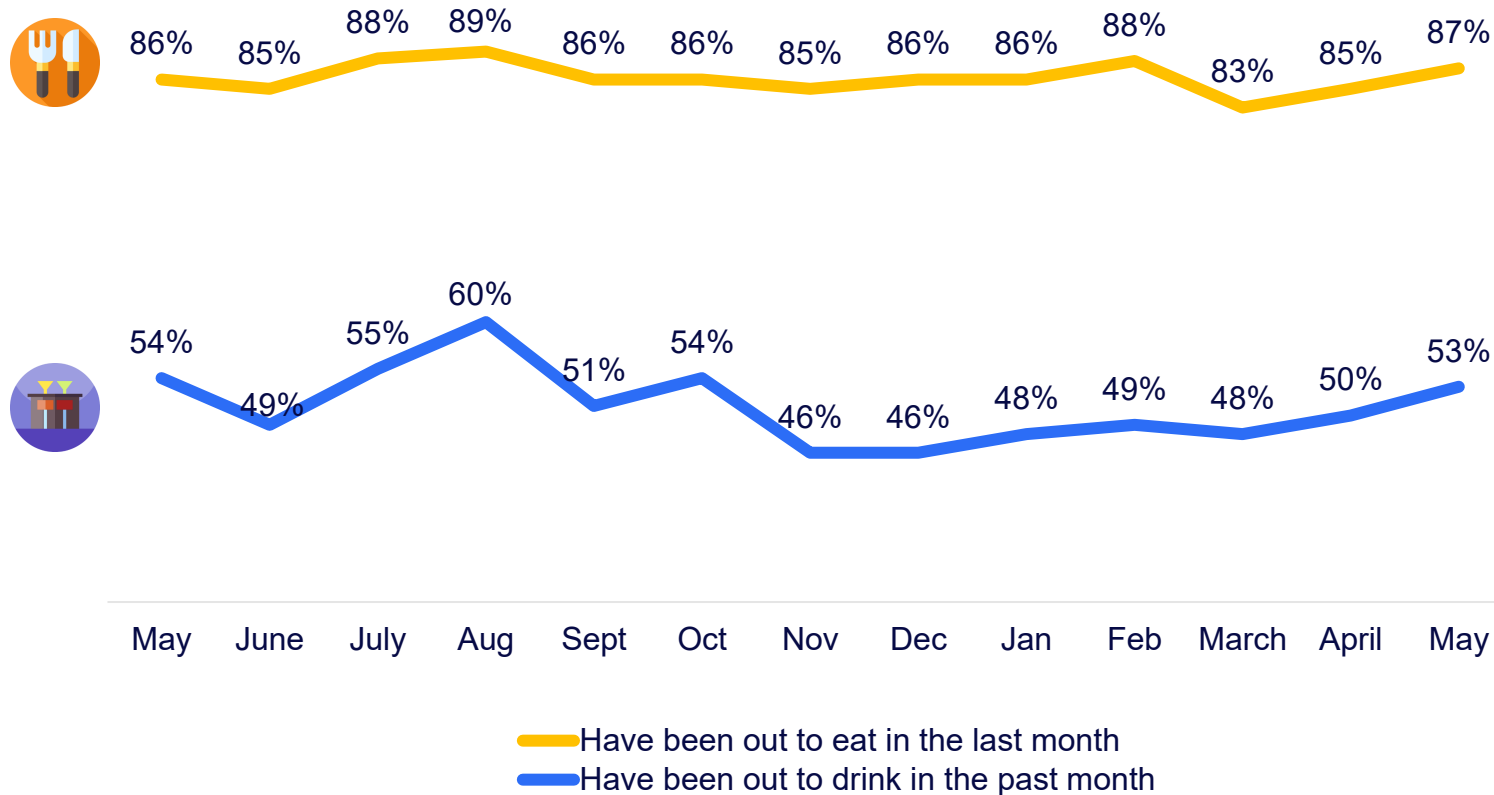


97% of consumers visited the
On Trade this month

+1pp vs May last year

FREQUENCY VISITING THE ON PREMISE OVER THESE LAST MONTHS

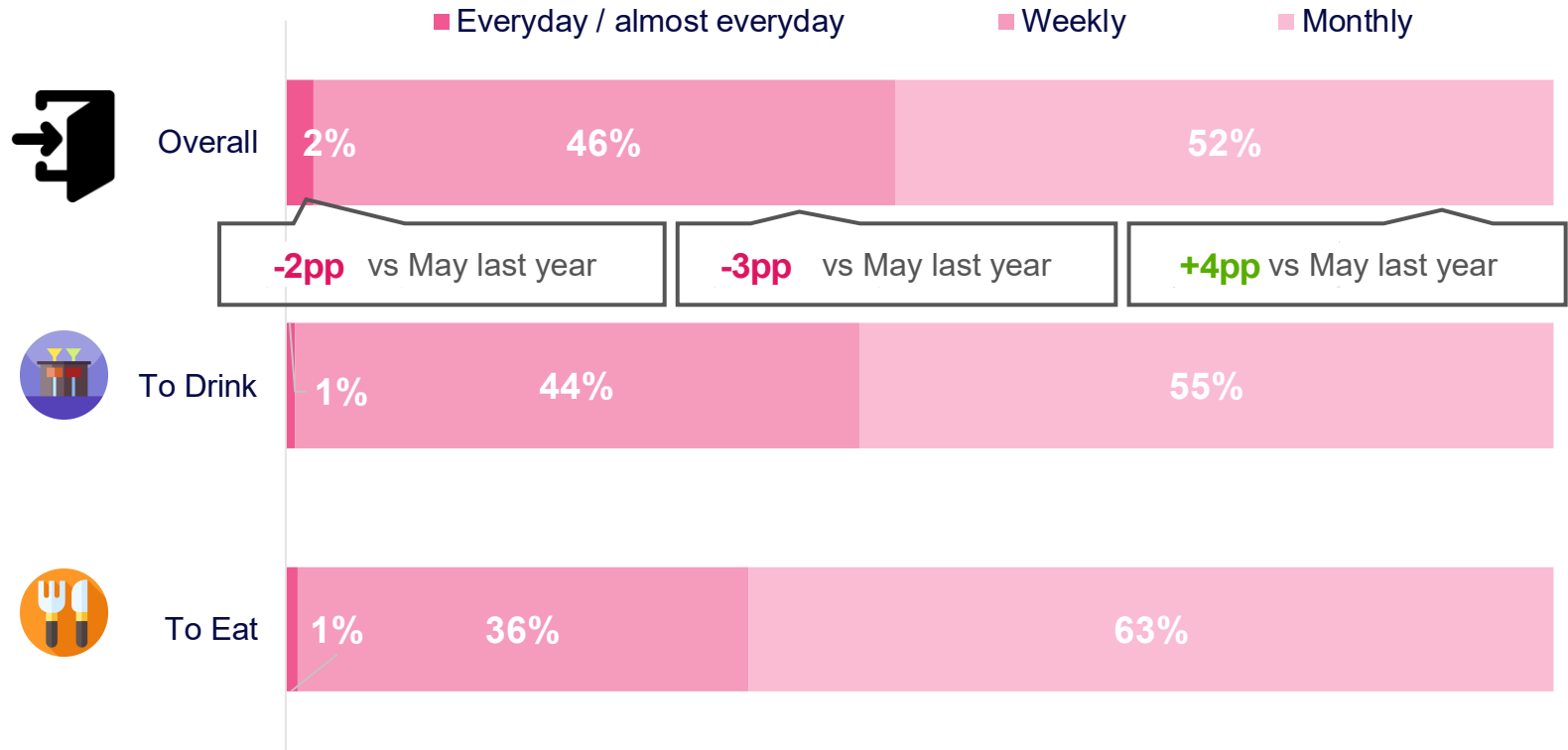
Yearly visitation rates to the On Premise



Source: CGA Monthly On Premise Consumer Pulse Report May 2025, 2026 – Sample: 750

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

Frequency visiting On Premise in the past month



Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 398 - 730

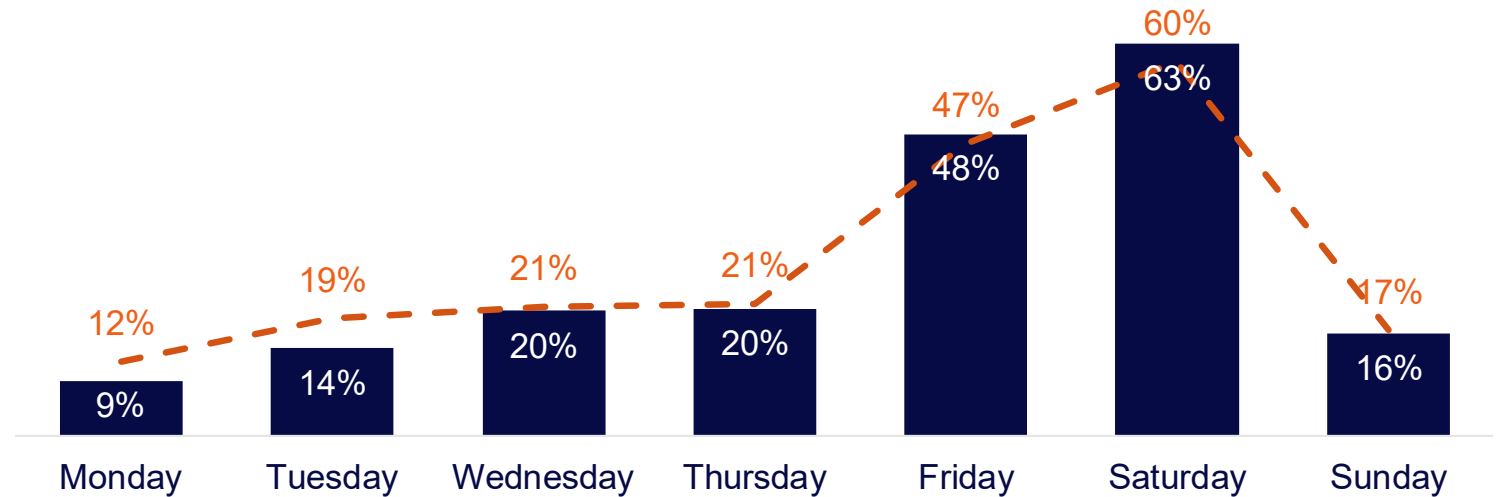




ON WHICH DAY(S) OF THE WEEK HAVE YOU VISITED A BAR, RESTAURANT OR OTHER SIMILAR VENUE OVER THE PAST MONTH?

Day of the week visiting the On Premise

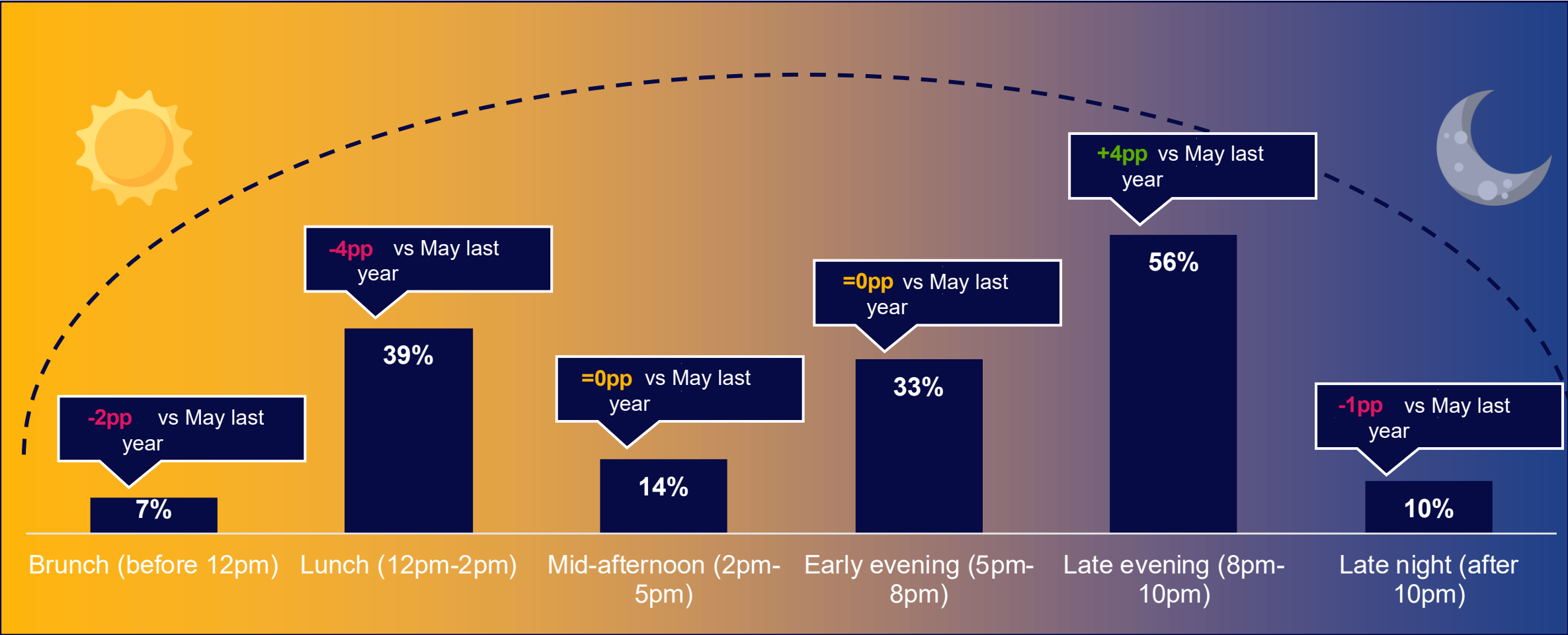
■ This month — This month last year



Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 725 - 730

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

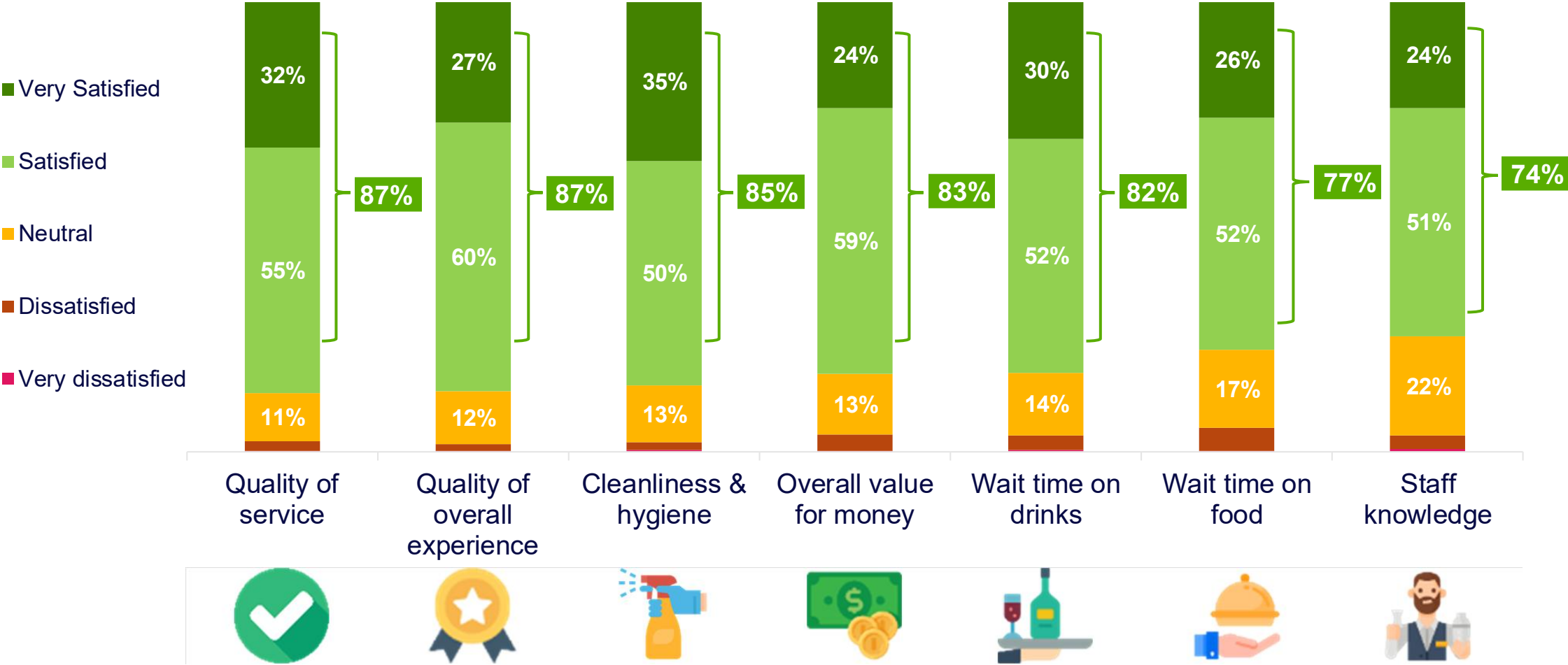
Time of day for visiting the On Premise



Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 723 - 728

SATISFACTION WITH MOST RECENT VISIT TO THE ON PREMISE

Proportion of consumers very satisfied/satisfied with...



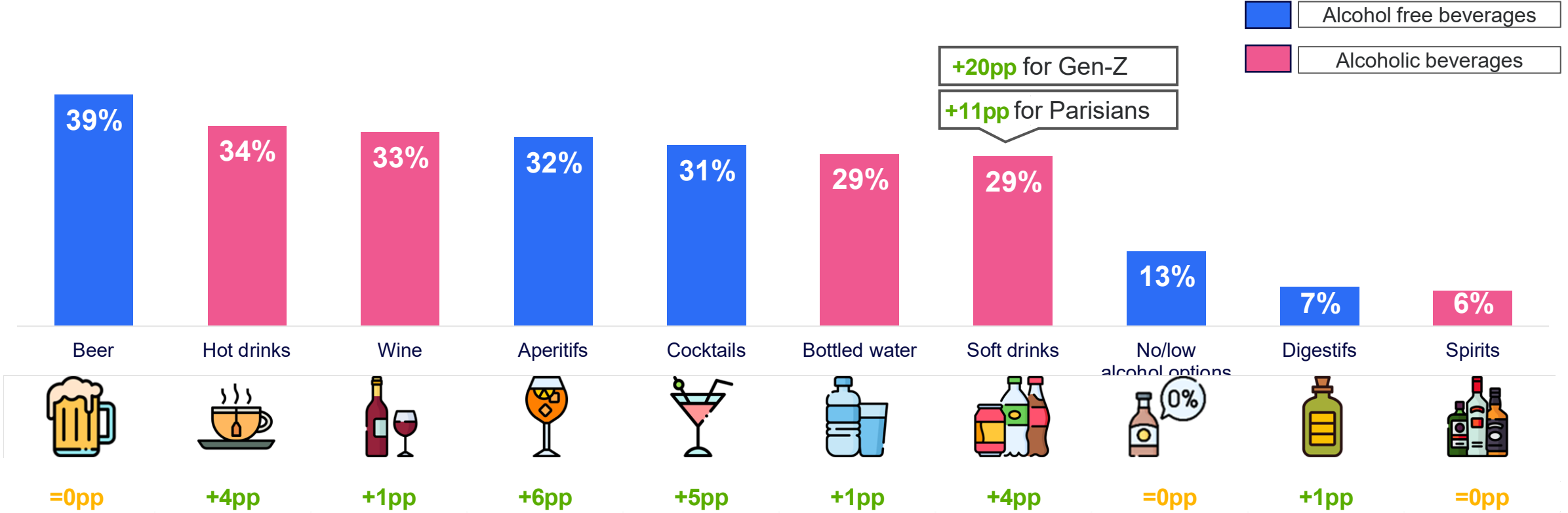
Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 654 - 750

Key Metrics: Categories Drunk



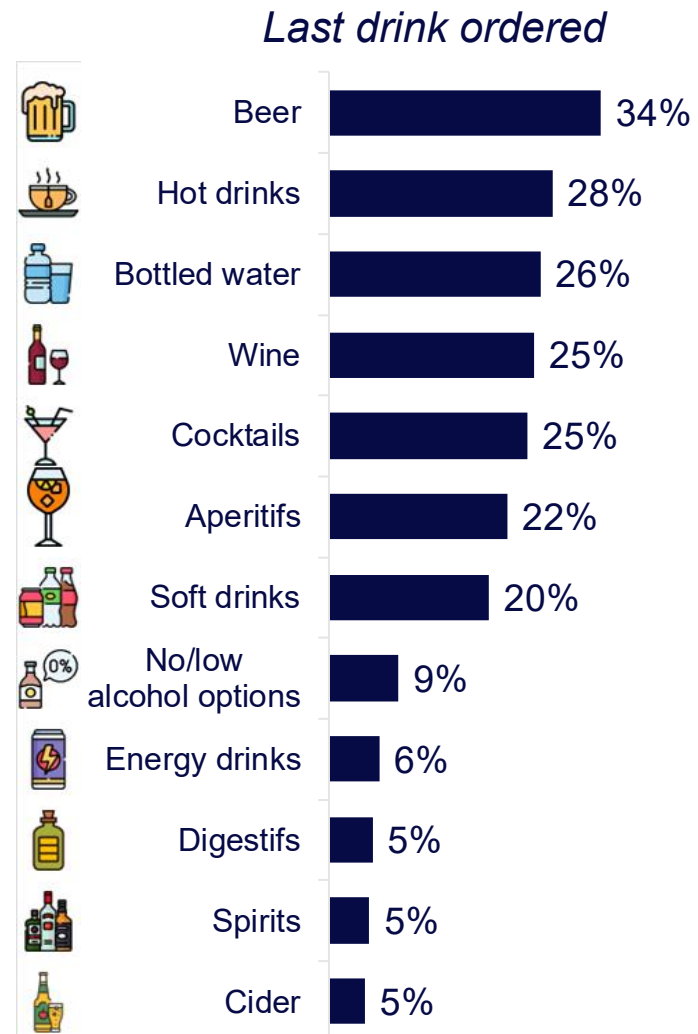
WHICH OF THE FOLLOWING DRINKS HAVE YOU DRANK IN BARS AND/OR RESTAURANTS IN THE PAST MONTH?

Top 10 most popular drink categories | Indexed vs. Last year



Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 151 - 730

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 May 2026 – Sample: 750

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** 

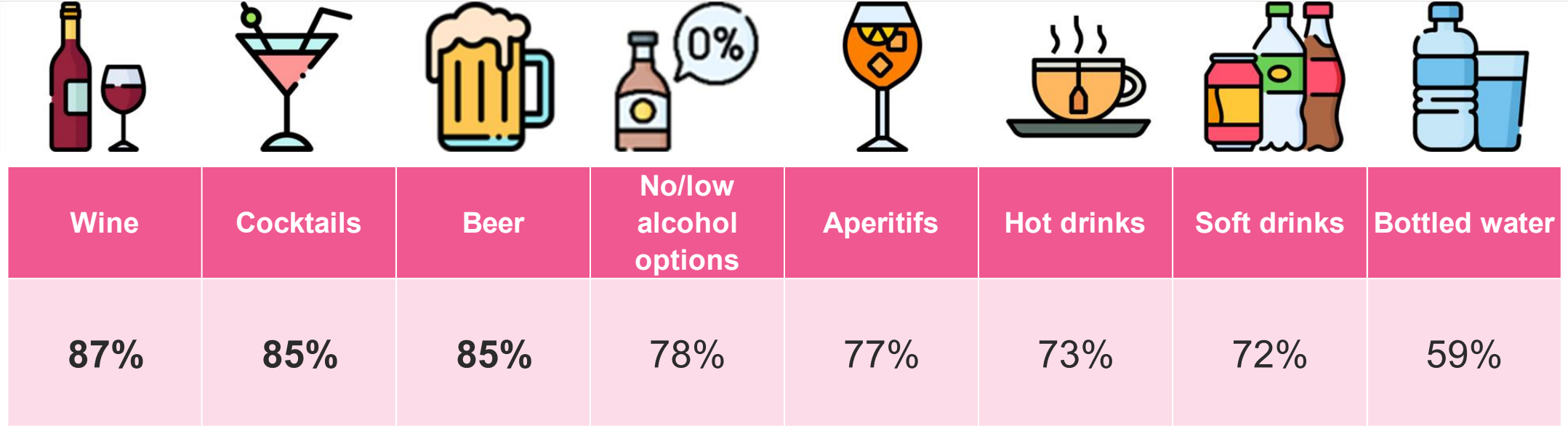
							
Wine	Hot drinks	Beer	Cocktails	No/low alcohol options	Aperitifs	Bottled water	Soft drinks
87%	86%	85%	79%	78%	78%	77%	69%

Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 65 - 253

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 May 2026 – Sample: 65 - 253

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** 

							
Wine	Hot drinks	Cocktails	Beer	No/low alcohol options	Aperitifs	Soft drinks	Bottled water
93%	88%	88%	86%	86%	86%	82%	82%

Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 65 - 253



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

+27pp for Gen-Z

+10pp for Parisians



30%

Yes



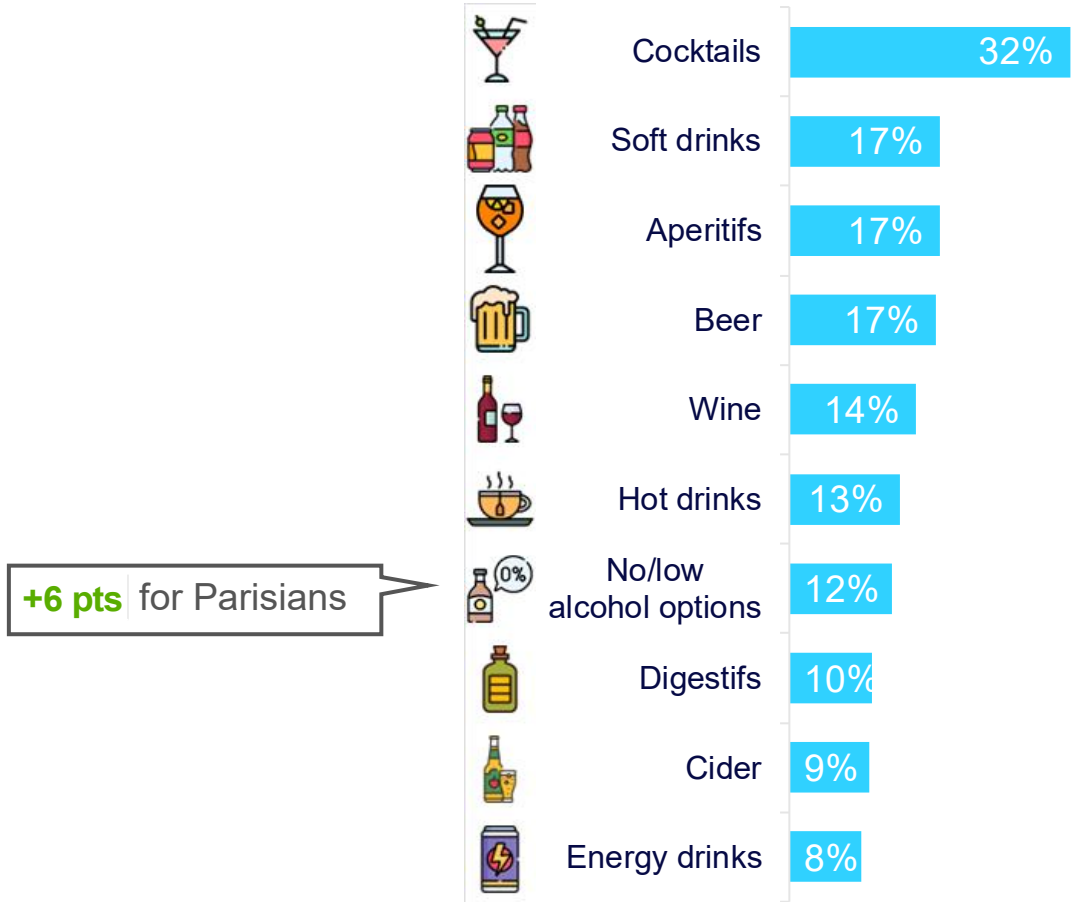
70%

No

Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 151 - 730

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

Top 10 new drinks tried by those going out for food and drinks



Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 63 - 221

Key Metrics: Next Month Prognosis





76%

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

+11pp for Parisians

43%

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

+6pp for Parisians

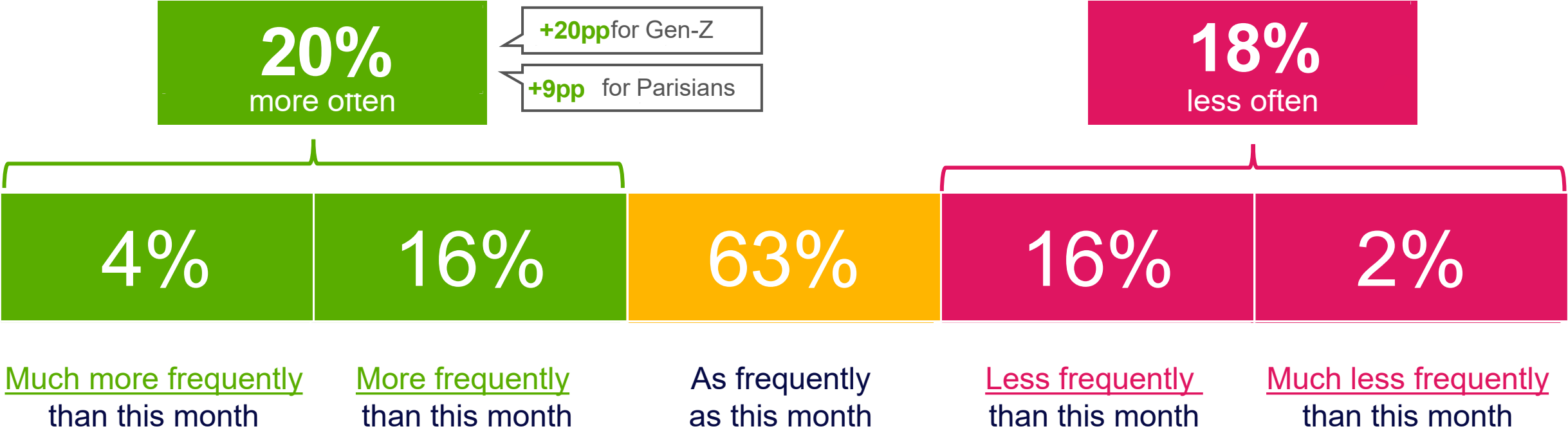


LOOKING FORWARD



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

Frequency consumers plan to visit the On Premise in the next month



Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 141 - 699

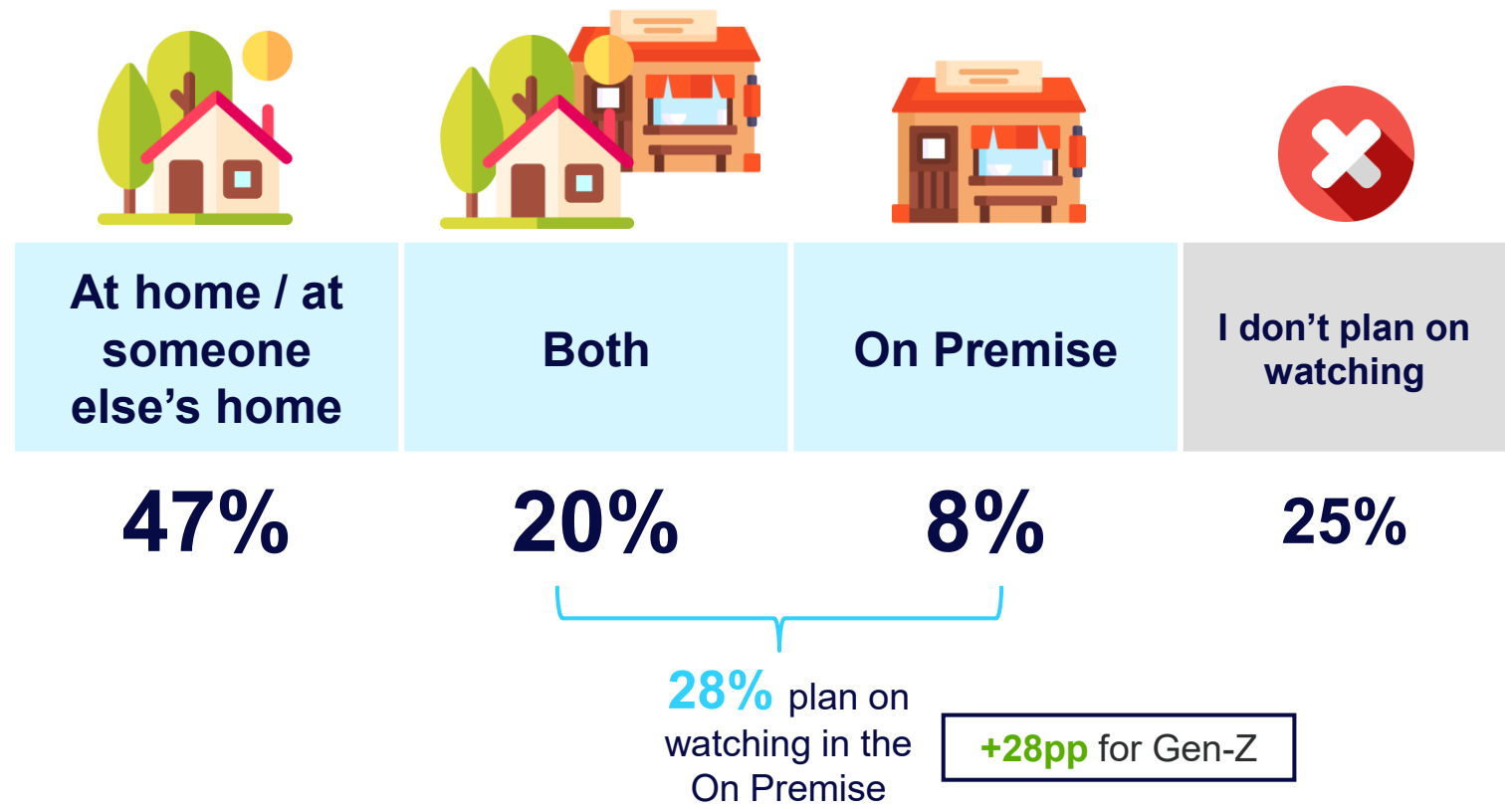
Hot topic: FIFA World Cup expectations





WHERE DO YOU PLAN ON WATCHING THE 2026 FIFA WORLD CUP?

Places where consumers plan on watching the FIFA World Cup

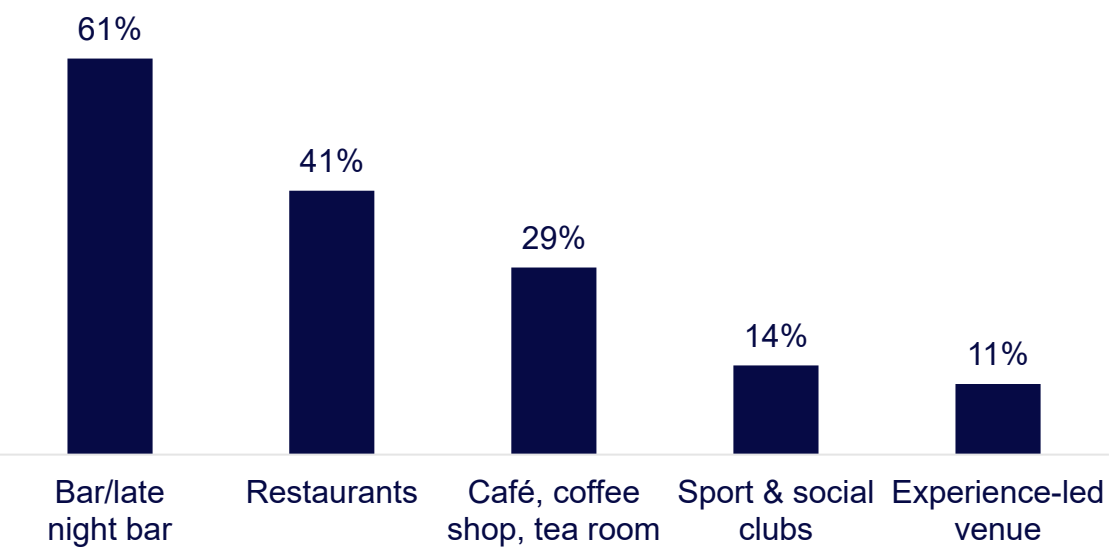


Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 153 750

WHERE DO YOU PLAN TO WATCH THE 2026 FIFA WORLD CUP?

Asked to those who plan on watching in On Premise

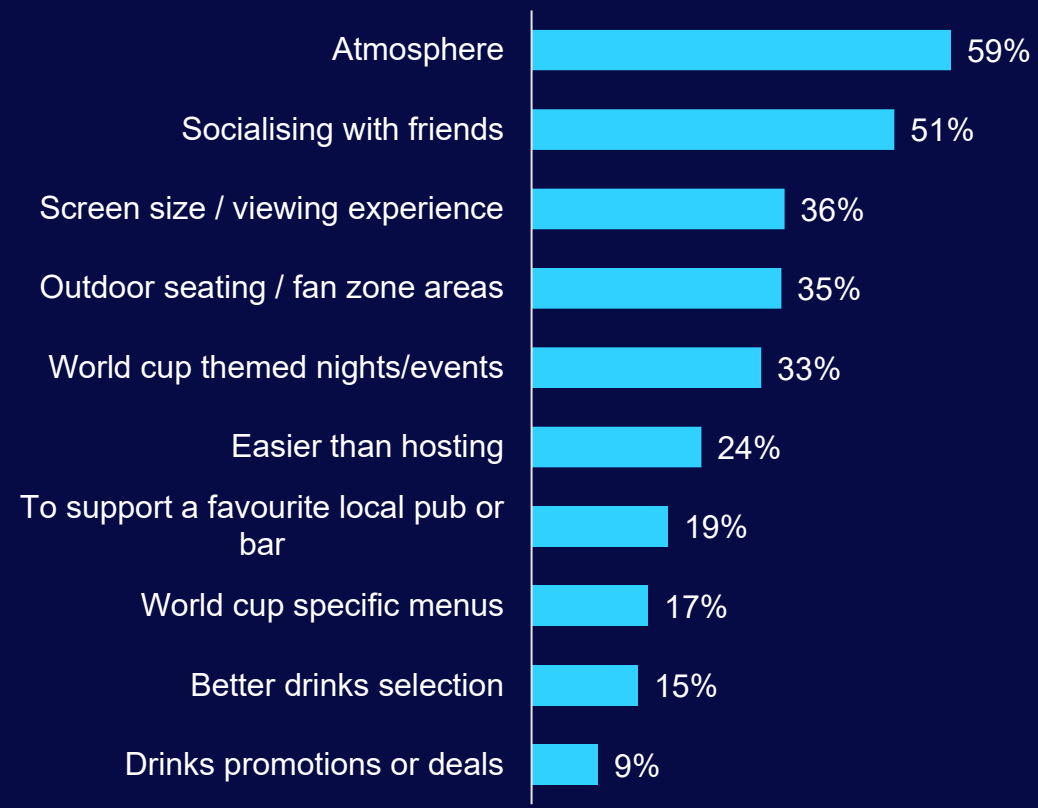
Top 5 venues where consumers plan to watch the World Cup



WHAT ARE YOUR MAIN REASONS FOR WATCHING THE WORLD CUP AT A BAR / RESTAURANT RATHER THAN AT HOME?

Asked to those who plan on watching in On Premise

Top 10 main reasons to watch the World Cup in On Premise





WHICH OF THE FOLLOWING MATCHES ARE YOU LIKELY TO GO OUT FOR?

Asked to those who plan on watching in On Premise

World Cup matches consumers will watch in the On Premise



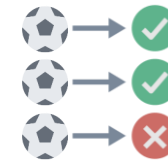
Finals

72%



Semi-finals

71%



**Knockout
rounds**

50%



**Group stage
matches**

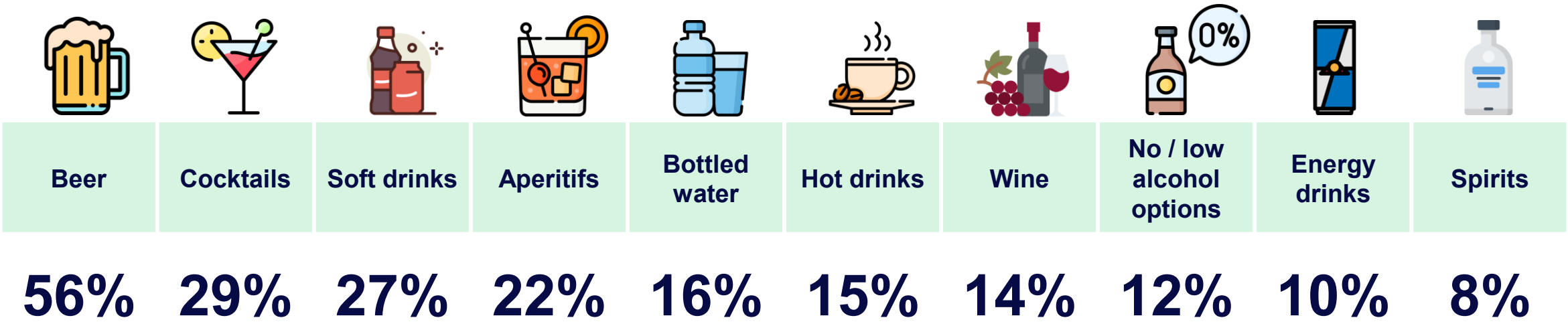
35%

Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 212

WHAT DO YOU PLAN TO DRINK WHEN VISITING THESE VENUES TO WATCH THE 2026 FIFA WORLD CUP?

Asked to those who plan on watching in On Premise

Top 10 drink categories consumers plan to consume when watching the World Cup



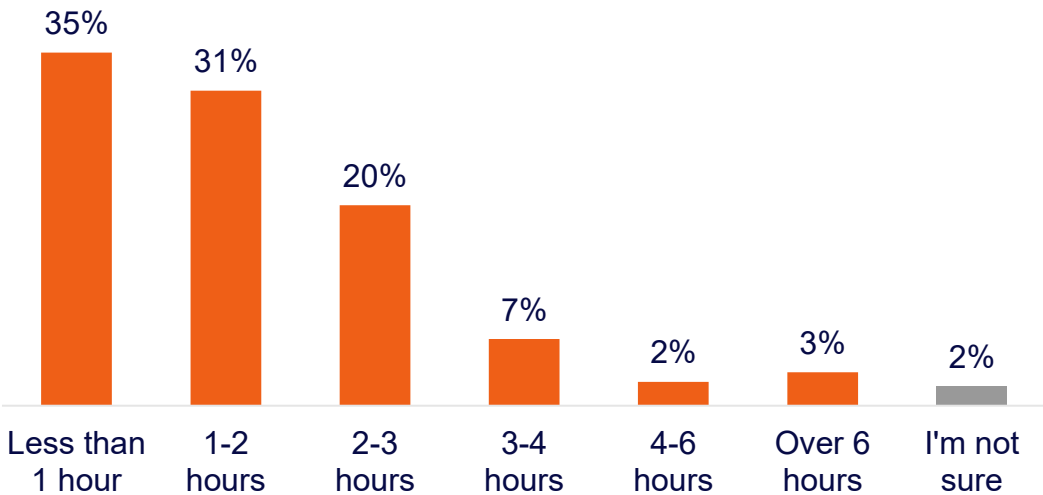
Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 212

HOW LONG DO YOU PLAN ON SPENDING IN BARS, RESTAURANTS OR SIMILAR VENUES TO WATCH THE 2026 FIFA WORLD CUP?

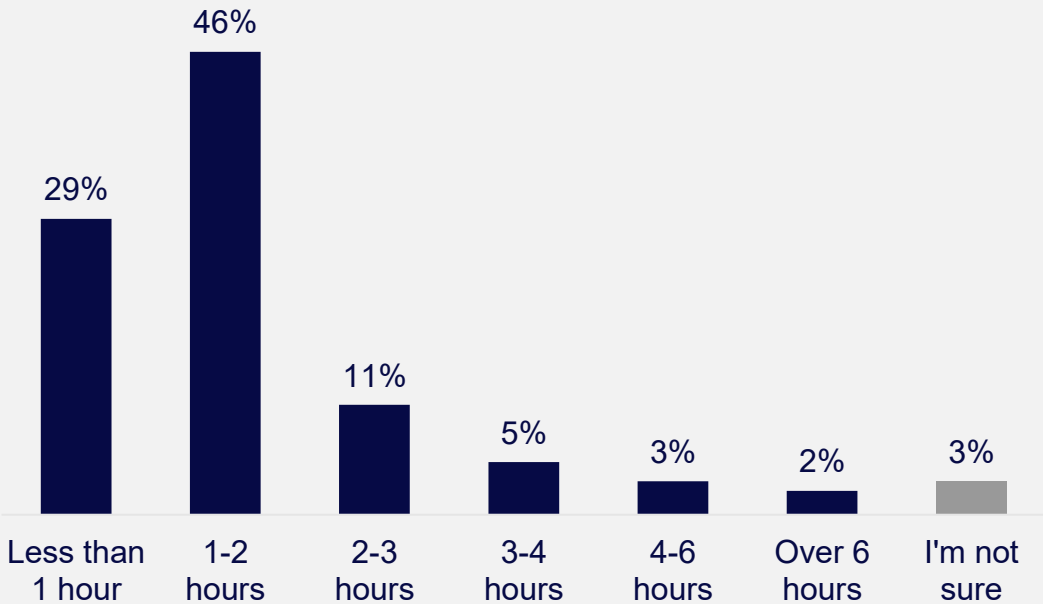
Asked to those who plan on watching in On Premise

Length of time consumers plan to spend in venues...

Before a game



After a game



Source: CGA Monthly On Premise Consumer Pulse Report May 2026 – Sample: 212

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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



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



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



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



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



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 build a successful On Premise strategy

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



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