

A top-down view of a restaurant table with several people. In the center, a hand holds a glass of beer with a thick head of foam. The glass has '10 BARREL BREWING CO' printed on it. Other glasses of beer are visible. Plates of food include a large pizza, a plate of fried chicken with green onions, a plate of french fries with a piece of meat, and a plate with a fried chicken drumstick. The background shows a person's arm with a tattoo and another person's hand. The overall atmosphere is casual dining.

FRENCH ON PREMISE CONSUMER PULSE REPORT

CGA by NIQ, July 2023



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 France.

This study looks into their 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 **July 2023** issue, we surveyed 750 consumers (aged 18+) between 14th - 22nd July. These consumers were situated across all French regions and must typically visit On Premise venues at least once within a 3-month period.

This report touches on habits and behaviour within the On Premise whilst on holiday.

SUMMARY: TOPLINE VISITATION & INTENTION

- Consumers have been highly engaged with the On Premise in July. The month has seen a net increase in visitation vs typical behaviour, particularly driven by the younger consumers living in cities and towns.
- There is a strong treat mindset amongst consumers which is driving this visitation, along with seasonal factors - ensure you are adapting towards this!
- However, it's important to note that a group of consumers have been visiting less frequently due to the impact of rising living costs and inflationary factors. These consumers are typically less engaged with the On Premise, and therefore effects are balanced out by those more engaged consumers increasing their visitation
- Looking into the future, consumers will continue to enjoy the On Premise - even more so Gen Z consumers, who are expected to increase their visits in the coming month.
- In July, beer was the most consumed drink in the French On Premise, closely followed by Aperitifs.



KEY METRICS / ON PREMISE VISITATION



VISITATION IN THE ON PREMISE OVER THE PAST MONTH

91%

Have been out to eat
in last month



54%

Have been out for drink
last month



*2% haven't visited the on
premise this month*



VISITATION PLANS FOR THE ON PREMISE MONTH AHEAD

91%

Plan to go out to eat in next month



56%

Plan to go out for a drink next month



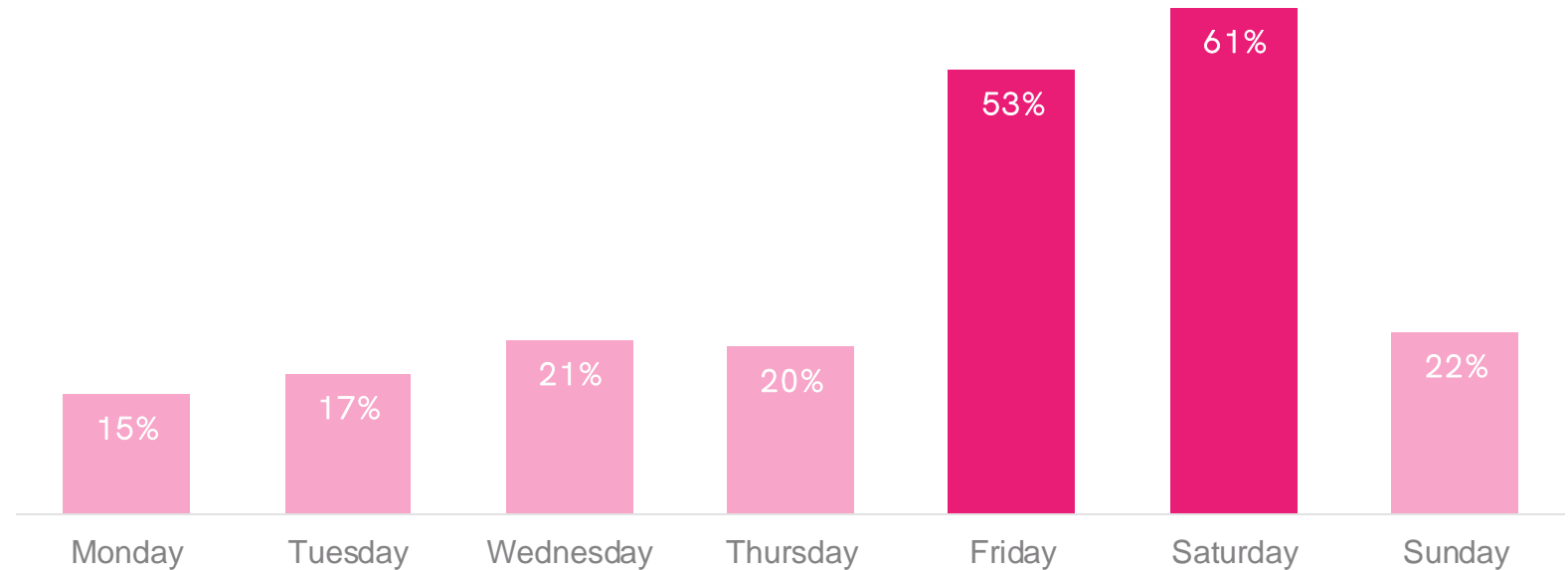
2% don't plan to visit the on premise next month





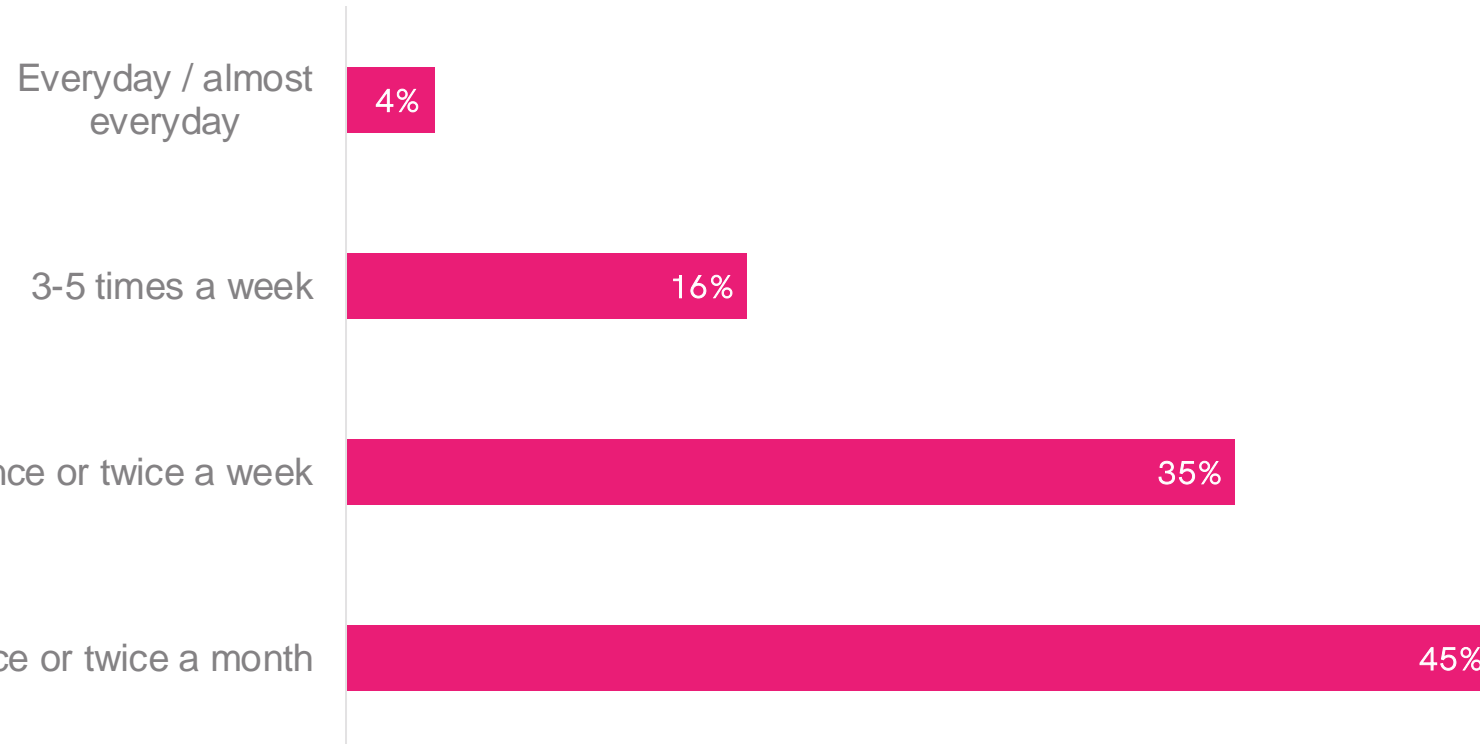
ON WHICH DAY(S) OF THE WEEK HAVE YOU VISITED A BAR, RESTAURANT OR OTHER SIMILAR VENUES OVER THE PAST MONTH?

Days of the week visited



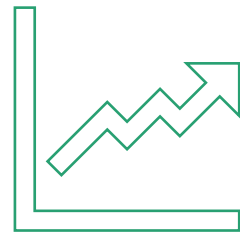
HOW OFTEN HAVE YOU VISITED BARS, RESTAURANTS AND OTHER SIMILAR VENUES OVER THE PAST MONTH?

Visiting habits



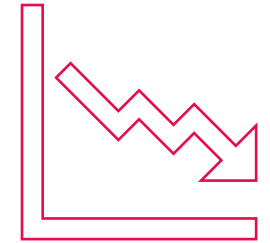
HOW DOES YOUR CURRENT BEHAVIOUR COMPARE TO HOW FREQUENTLY YOU USUALLY GO OUT?

Change in frequency of visitation



31%

Going out more often



39%

Going out the same

30%

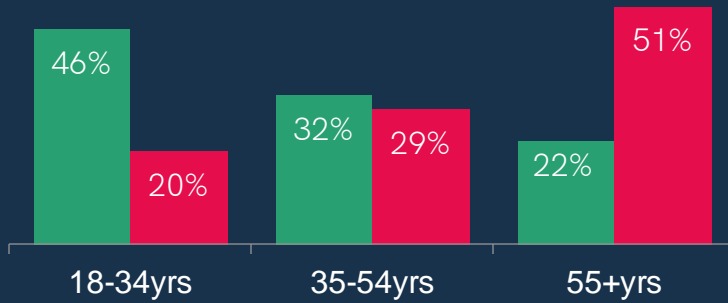
Going out less often



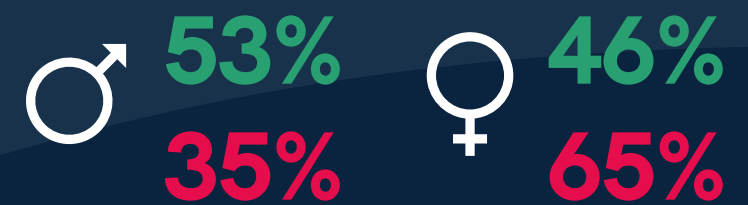
Those going out more frequently over the past month skew towards the younger, urban more lucrative On Premise consumers

Going out more | Going out less

Age groups



Gender



Location of residence



67% **48%**

City centre / town centre

33% **52%**

Rural / suburban

Average household income

€42,164

€33,908

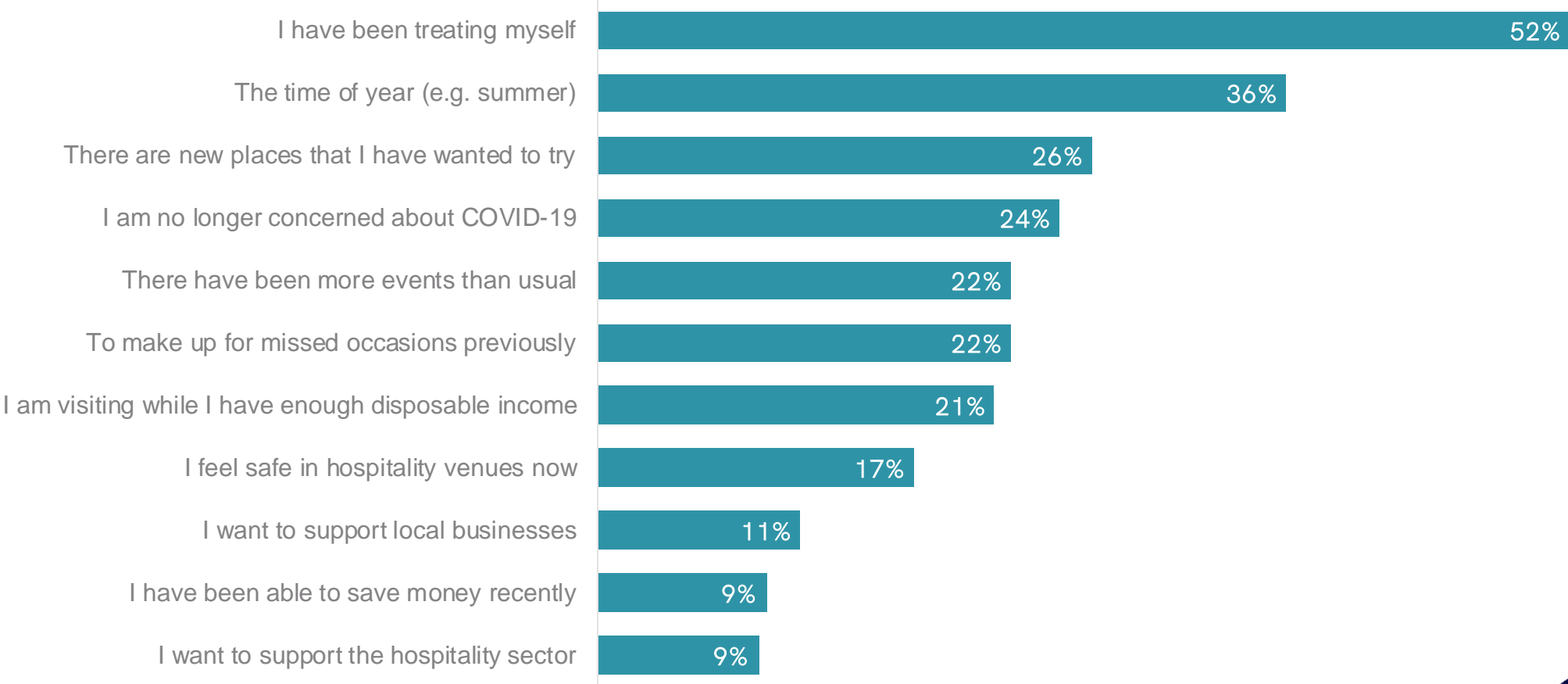
Typically visits the On-Premise...

At least weekly **78%** **25%**



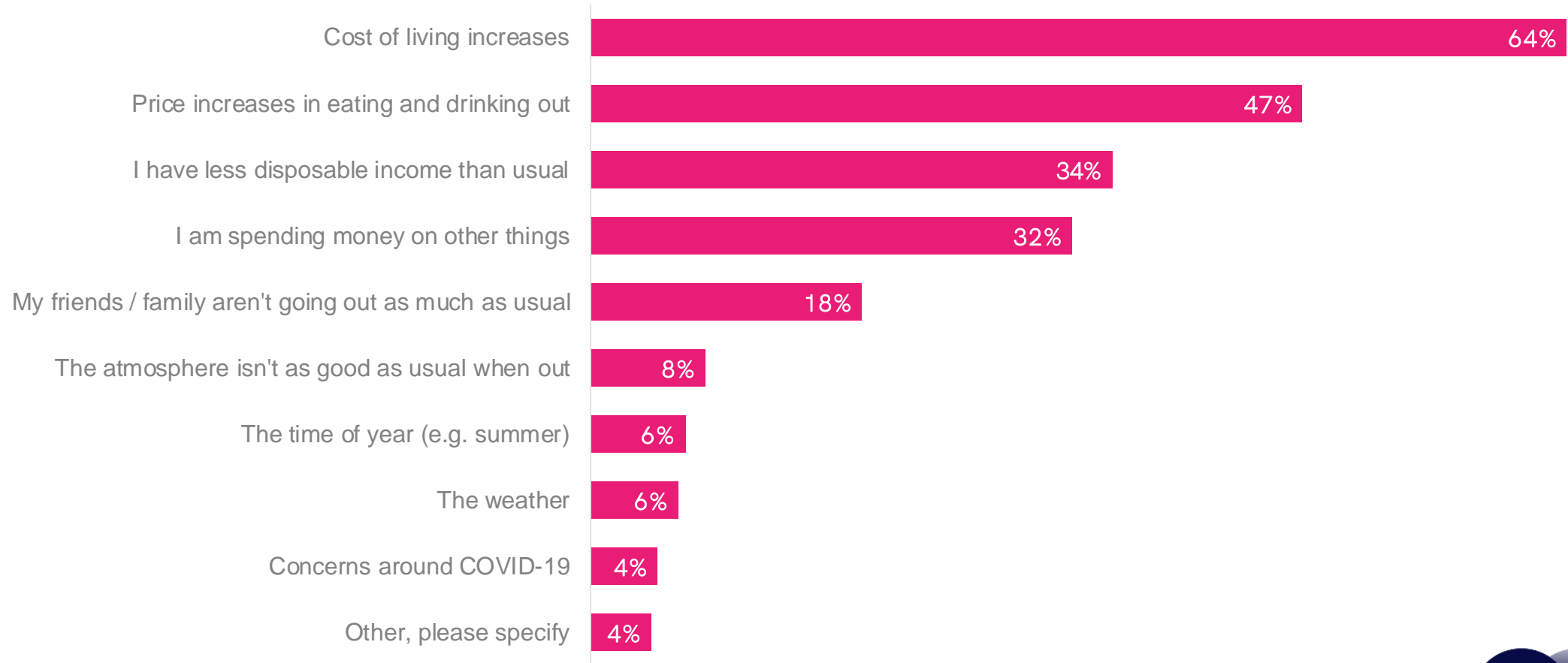
YOU HAVE SAID THAT YOU ARE CURRENTLY GOING OUT MORE FREQUENTLY THAN USUAL, WHY IS THIS?

Reasons for going out to the on premise more frequently than usual



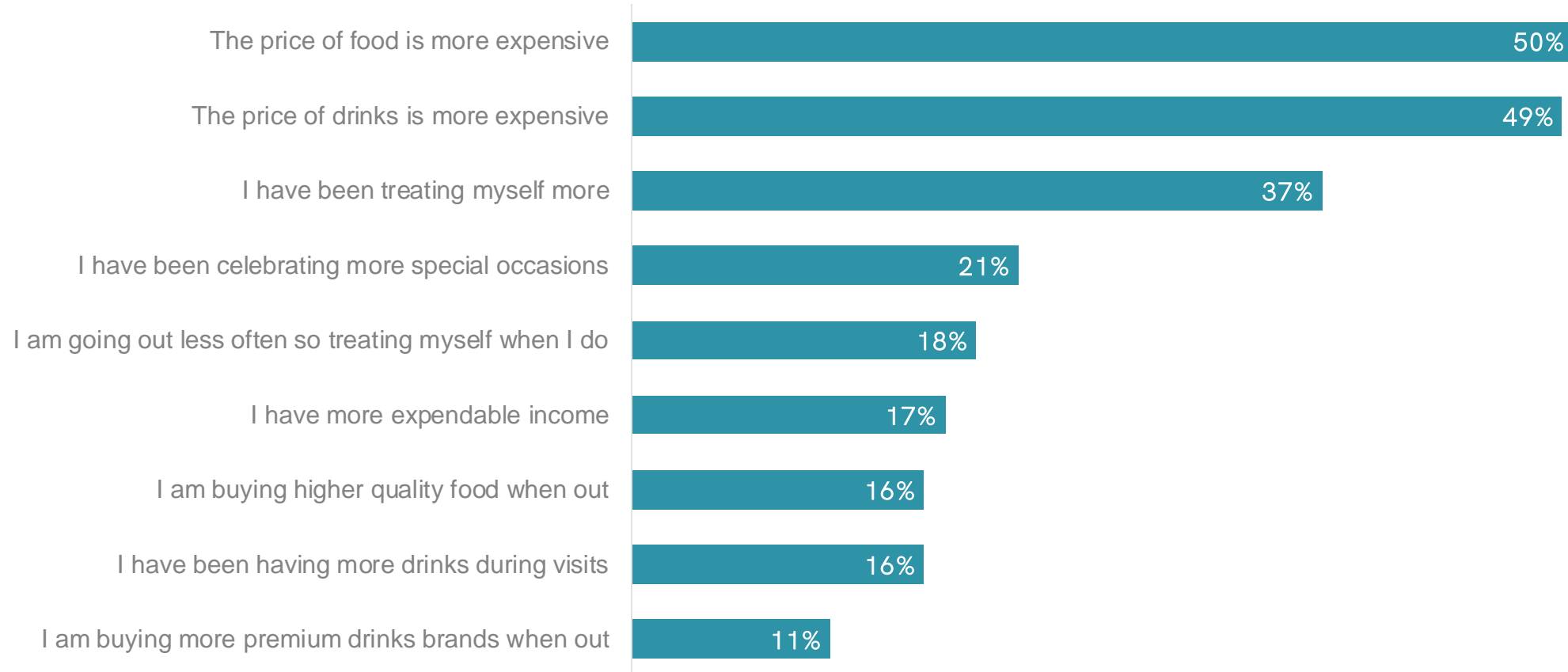
YOU SAID THAT YOU ARE CURRENTLY GOING OUT LESS FREQUENTLY THAN USUAL, WHY IS THIS?

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



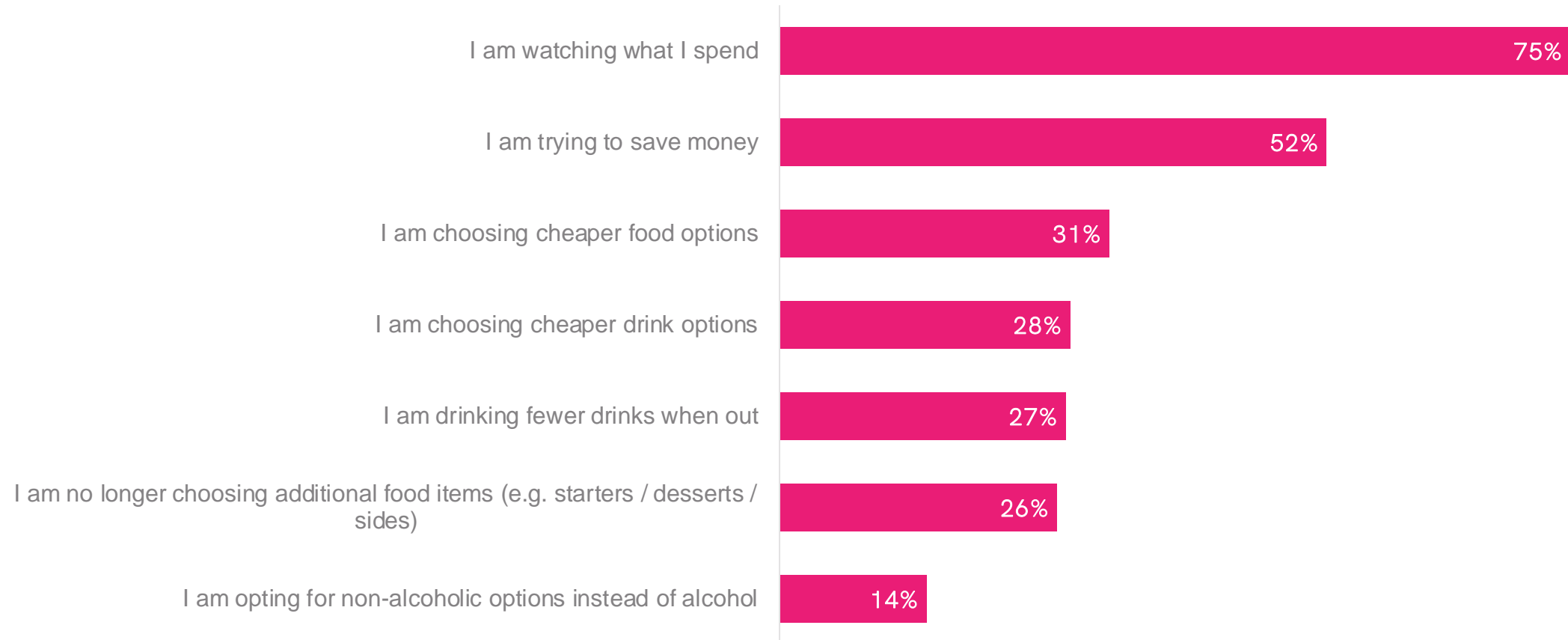
WHICH IF ANY OF THE FOLLOWING ARE REASONS WHY YOU ARE SPENDING MORE NOW WHEN OUT PER VISIT IN BARS, RESTAURANTS AND SIMILAR VENUES?

Reasons for increased spend per visit



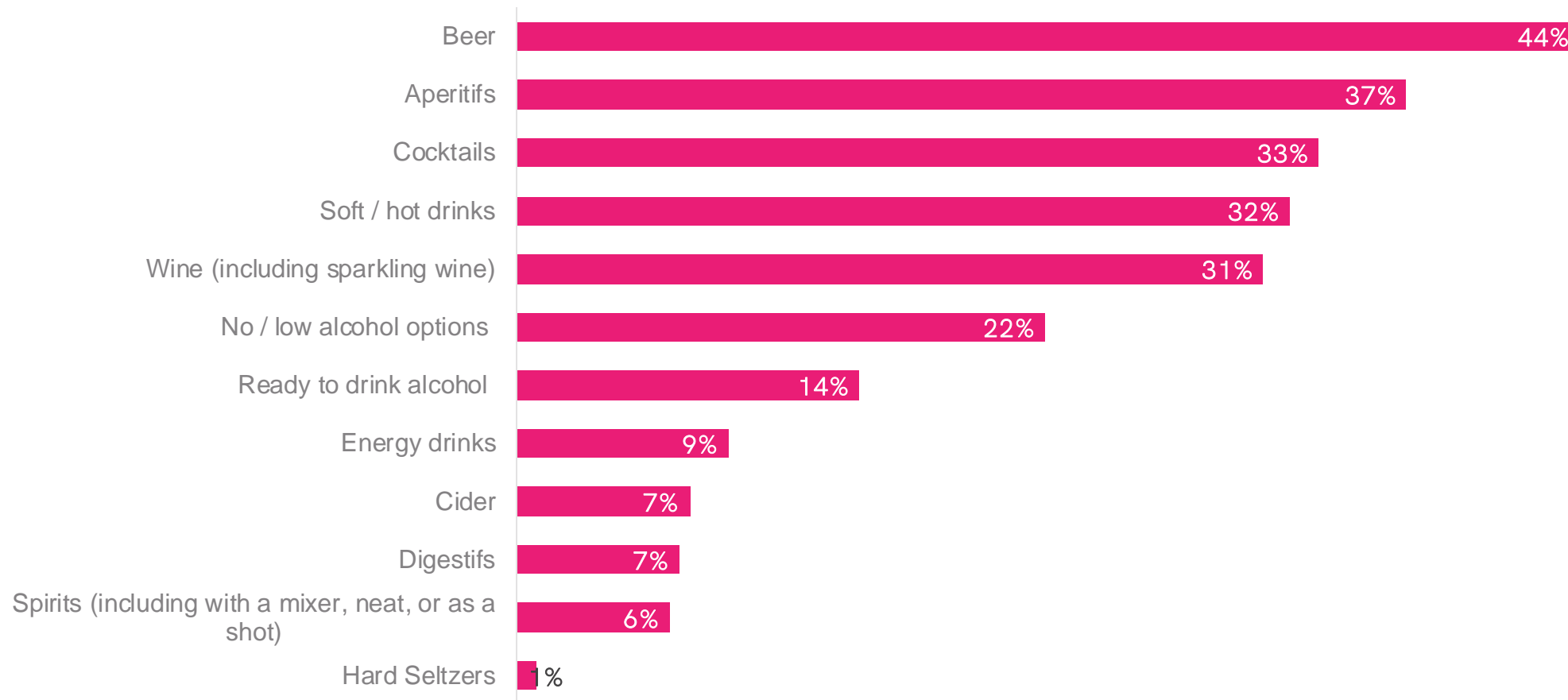
WHICH IF ANY OF THE FOLLOWING ARE REASONS WHY YOU ARE SPENDING LESS NOW WHEN OUT PER VISIT IN BARS, RESTAURANTS AND OTHER SIMILAR VENUES?

Reasons for decreased spend per visit



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

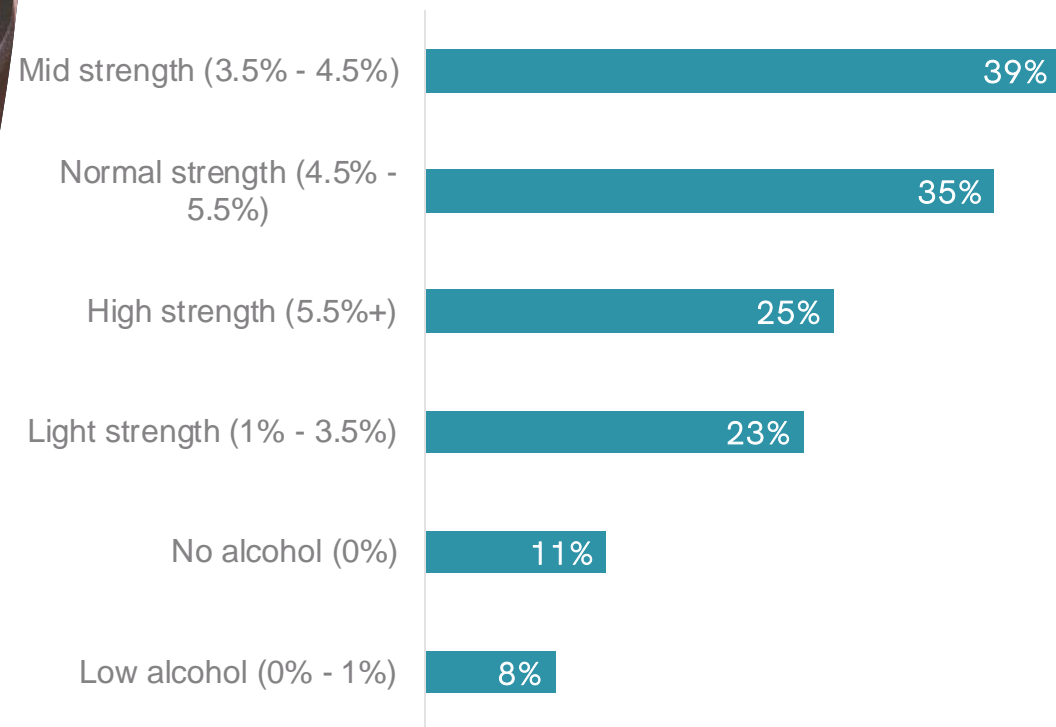
Drink choice of those who have visited the On Premise in the past month





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

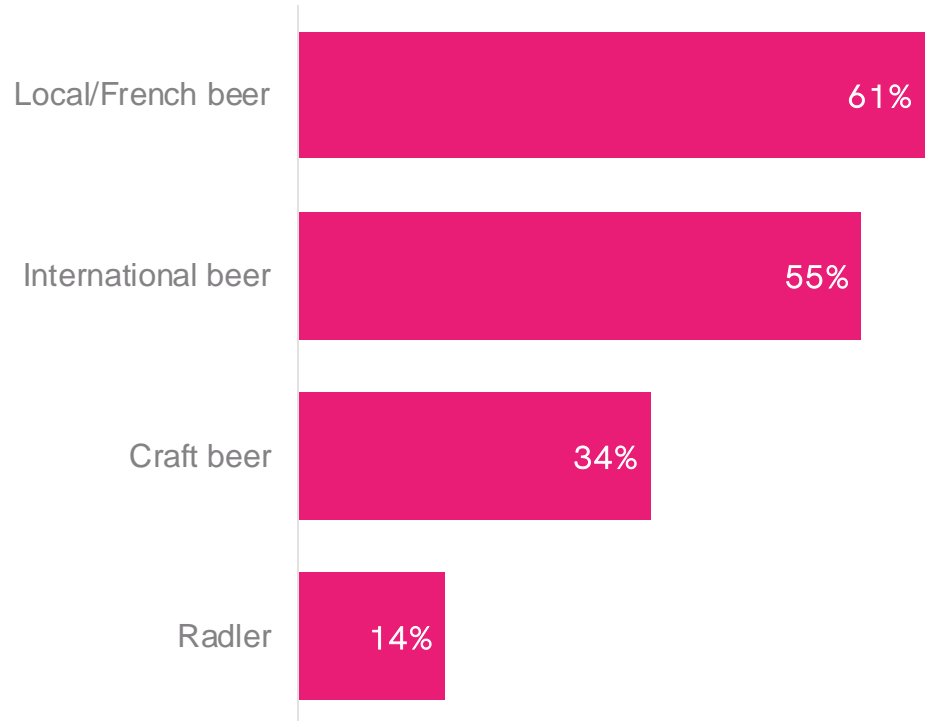
Strengths of beer consumers have drunk in the past month





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





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



+17pp for Gen Z





HOT TOPICS - Holidays

- There is a great opportunity in France for domestic holidays, with over double the amount of consumers planning to holiday in France over European destinations.
- The On Premise is a vital part of these holidays, with visiting the On Premise ranking top in activities consumers plan to enjoy whilst on holiday
- Experimentation is key here. Consumers like to try both new food and new drinks whilst relaxing on holiday
- Whilst eating and drinking out is amongst consumers priorities when on holiday, it is important to get the balance between value and quality right, both factors being ranked the highest in importance when visiting the On Premise on holiday



58%

Of French consumers plan to go on domestic holiday this year

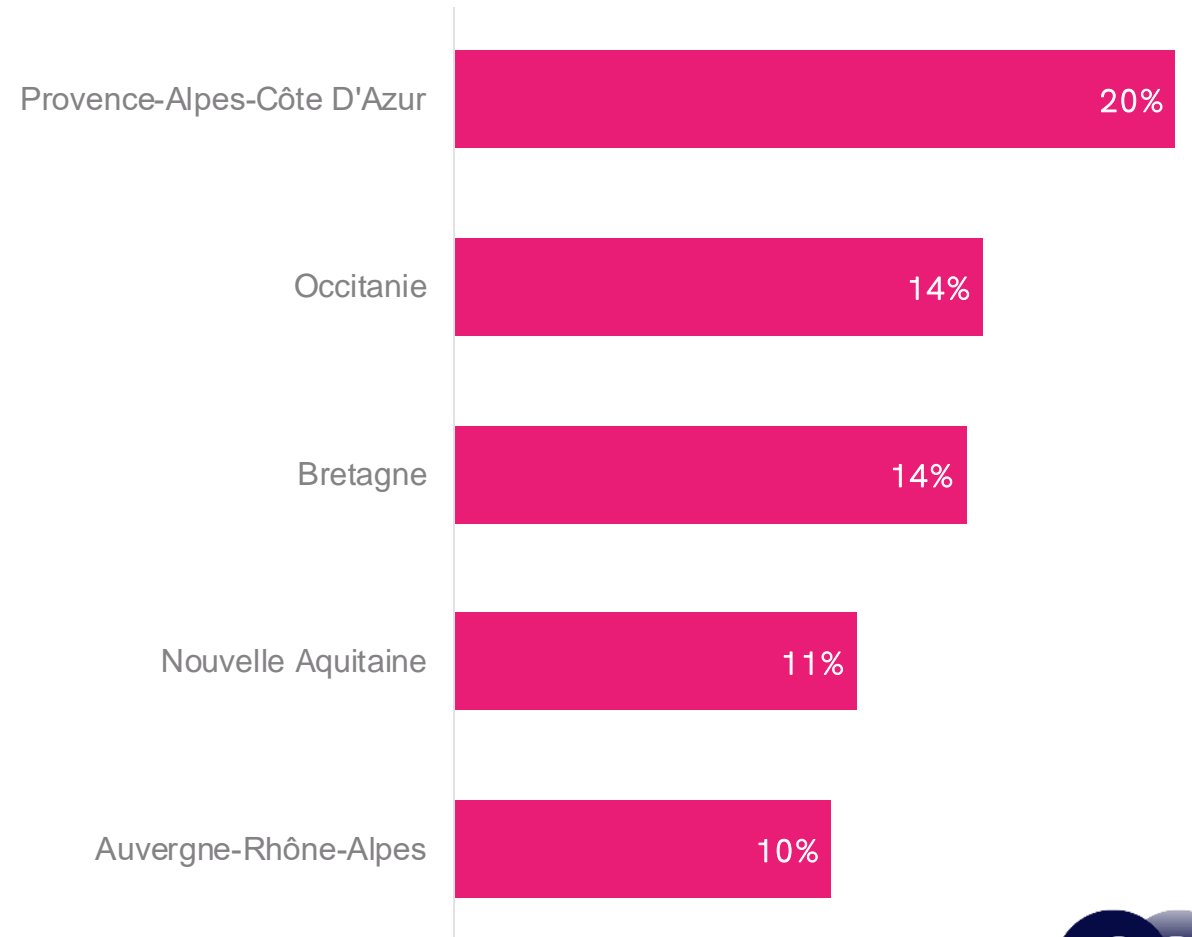
24%

Of French consumers plan to go Europe on holiday this year



WHERE IN FRANCE ARE YOU PLANNING TO VISIT OVER SUMMER?

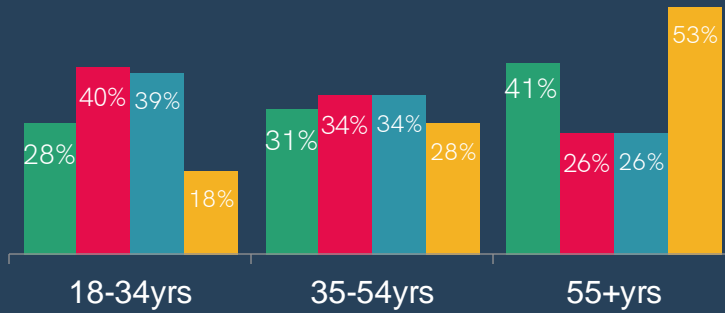
Places in France planning to visit this summer | Top 5



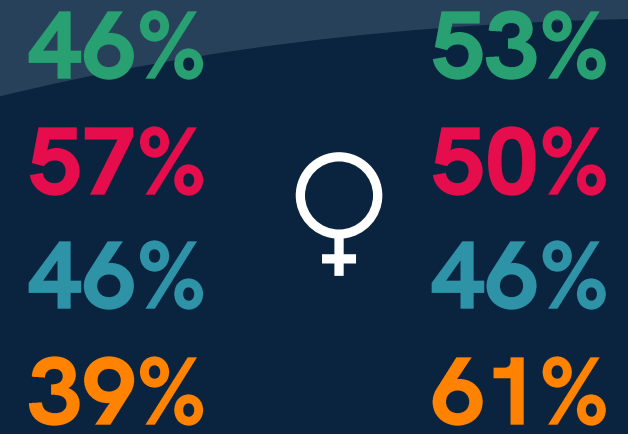
Those who are completing domestic holidays this summer are typically an older group, however uphold similar spend to those travelling internationally

In France In Europe Outside of Europe Not going on holiday

Age groups



Gender



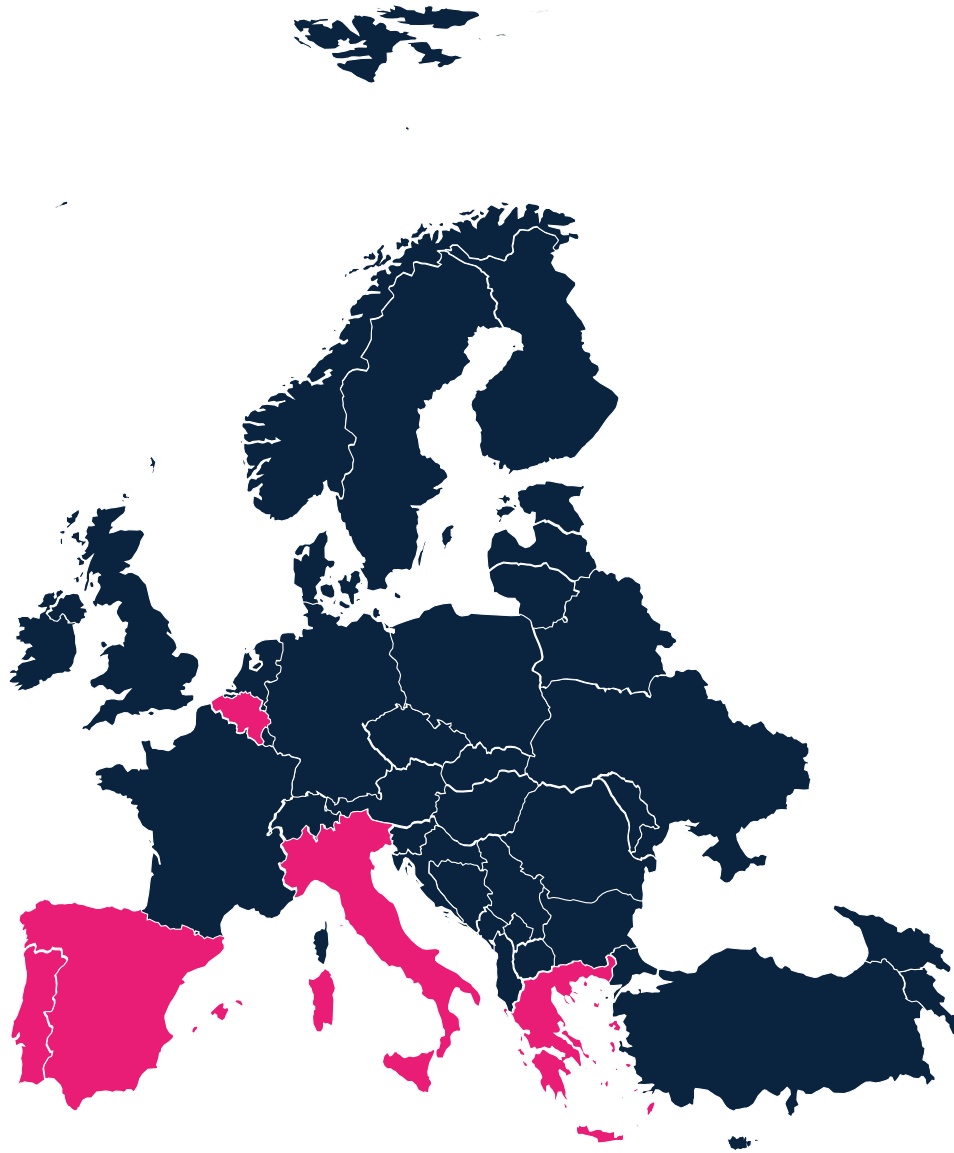
Average household income



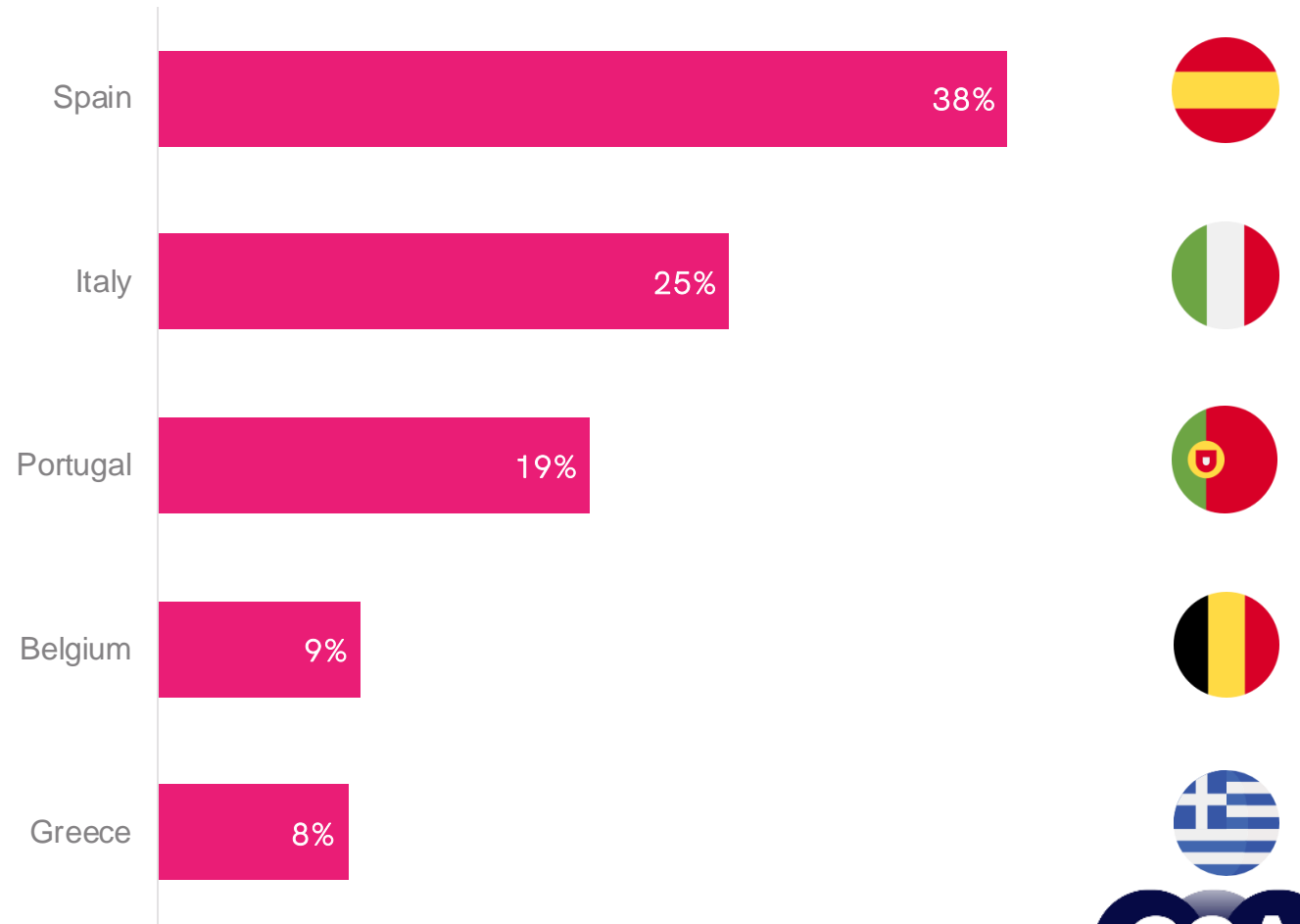
Average spend eating / drinking out on holiday



WHERE IN EUROPE ARE YOU PLANNING TO VISIT THIS SUMMER?



Countries in Europe Planning to visit this summer | Top 5



PLANS TO VISIT FRANCE OVER THE SUMMER IN ITALY AND GERMANY

19%

Of **Italian** consumers
plan to visit France
this summer



10%

Of **German** consumers
plan to visit France this
summer

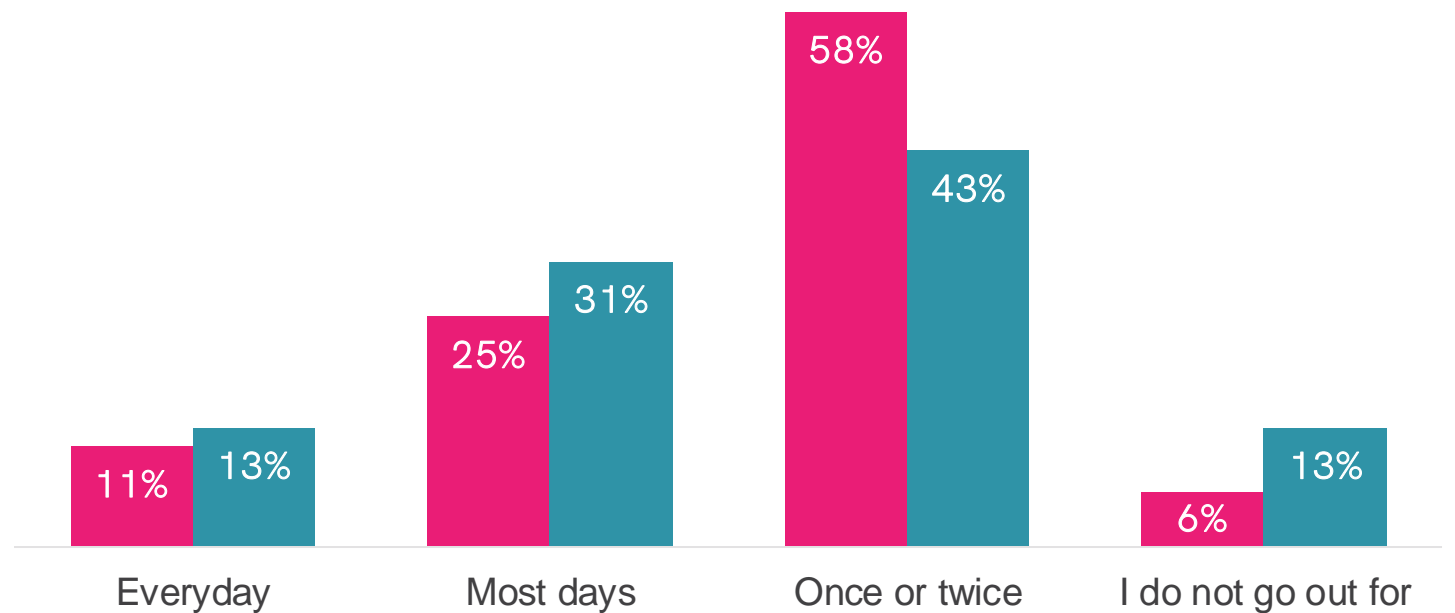




HOW OFTEN DO YOU TYPICALLY GO OUT TO EAT AND/OR DRINK WHILE YOU ARE ON HOLIDAYS

Eating and drinking on holidays

■ Go out to eat ■ Go out to drink





French consumers spend
on average

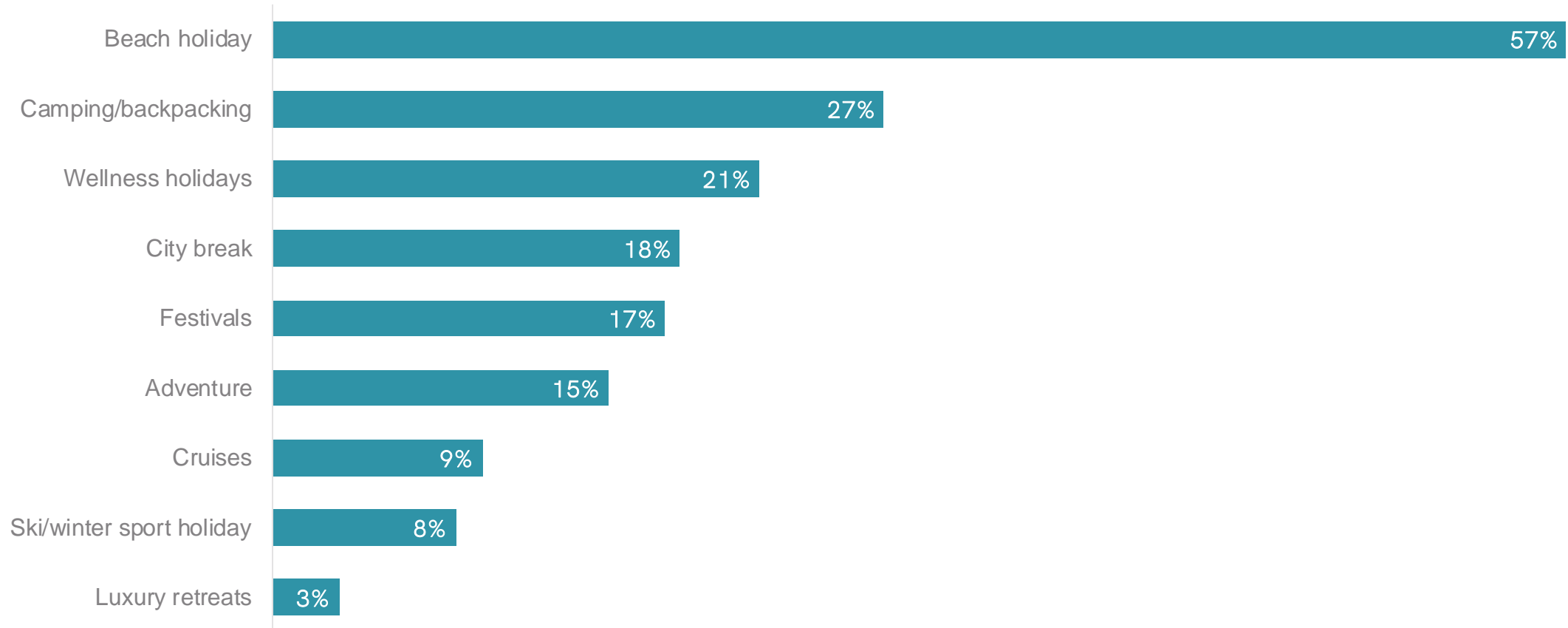
€130

on eating and drinking out
per week on holiday



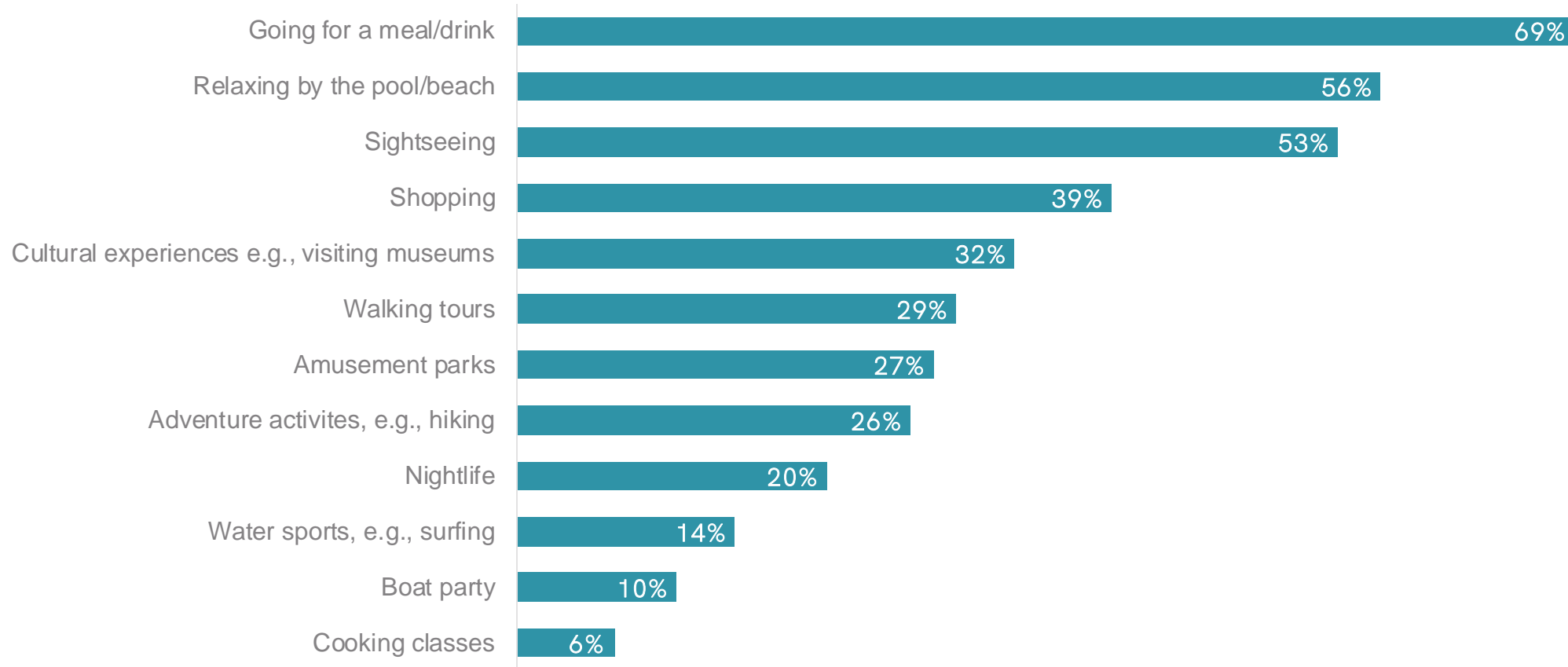
WHICH OF THE FOLLOWING TYPES HOLIDAYS DO YOU PLAN TO GO ON THIS YEAR?

Types of holidays consumers are planning to go this year



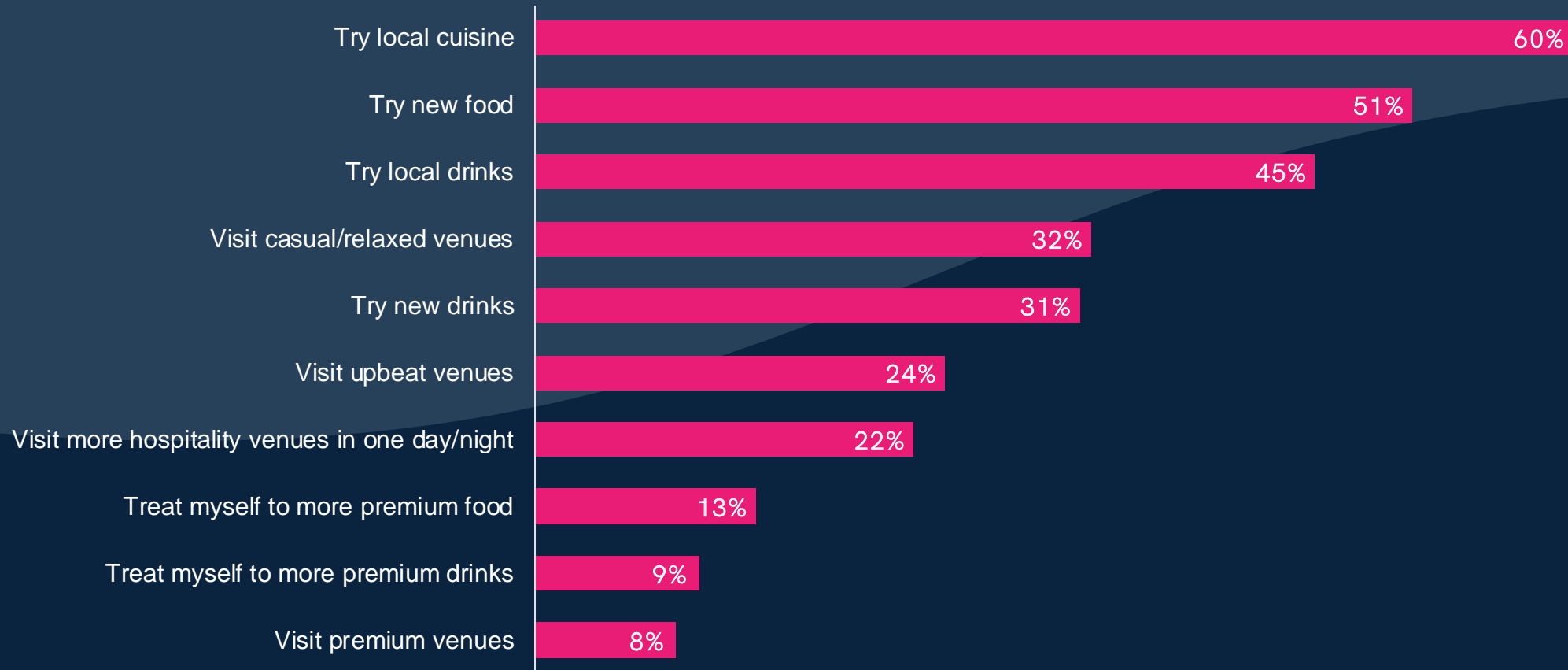
WHICH OF THE FOLLOWING ACTIVITIES DO YOU PLAN ON DOING WHILST ON YOU'RE HOLIDAY?

Types of activities consumers are planning to do on holiday



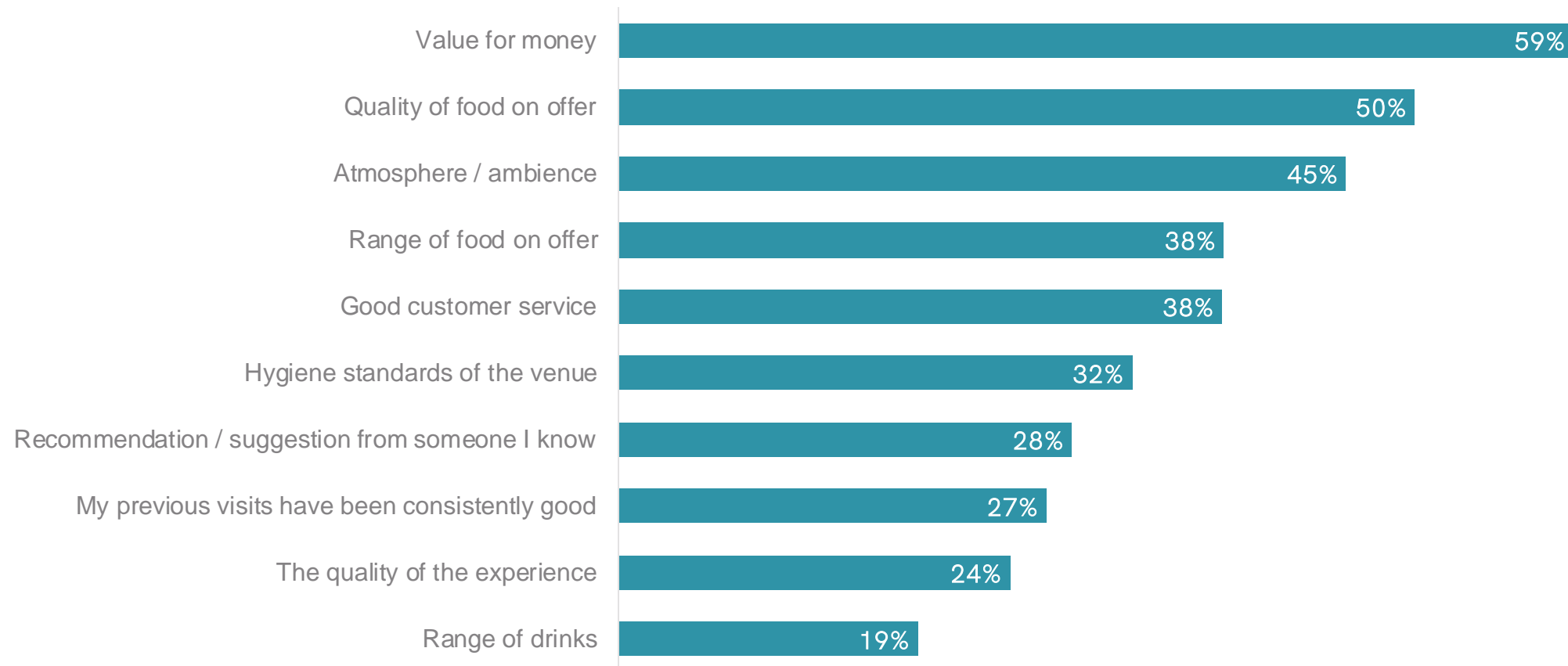
WHICH OF THE FOLLOWING, IF ANY, DO YOU TYPICALLY DO WHEN ON HOLIDAY?

Things customers would typically do when on holiday



WHICH OF THE FOLLOWING FACTORS ARE MORE IMPORTANT WHEN CHOOSING WHERE TO EAT OR DRINK OUT ON HOLIDAY?

Important factors when choosing where to eat or drink out on holiday | Top 10





Want to know more about how global trends are currently impacting the French On Premise?



Want to know more about how global trends are currently impacting the French 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 French 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 French 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

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