GERMAN ON PREMISE CONSUMER PULSE REPORT

CGA by NIQ, August 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 Germany.

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 **August 2023** issue, we surveyed 1000 consumers (aged 18+) between 16th – 22nd August. 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 on habits and behaviours in the On Premise whilst on Holiday.

SUMMARY: TOPLINE VISITATION & INTENTION

- The past month has seen a decrease to the frequency of consumer visitation in the On Premise, with a greater number of consumers making fewer visits per week. This decrease in frequency is predominately seen for food-led visits, with an increase seen in drink-led visits. More consumers are looking to try new things when out, highlighting a potential opportunity to drive visitation.

- Cost of Living increases were the primary reason for consumers visiting the On Premise less frequently – there is a need to increase the overall value of visits to the On Premise.

- However, there is a core group of consumers who want to help, with supporting local businesses and the sector as a whole being the highest indexing factor driving increased visitation this month. This shows consumer empathy for the sector, and that consumers are making an effort to show their support when they can.

- There has been a rise in uptake across a few drink categories over the past month, with increases in the proportion of consumers drinking wine, no/low alcoholic options, spirits, and RTDs.

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KEY METRICS / ON PREMISE VISITATION

VISITATION IN THE ON PREMISE OVER THE PAST MONTH

89%

Have been out to eat in last month

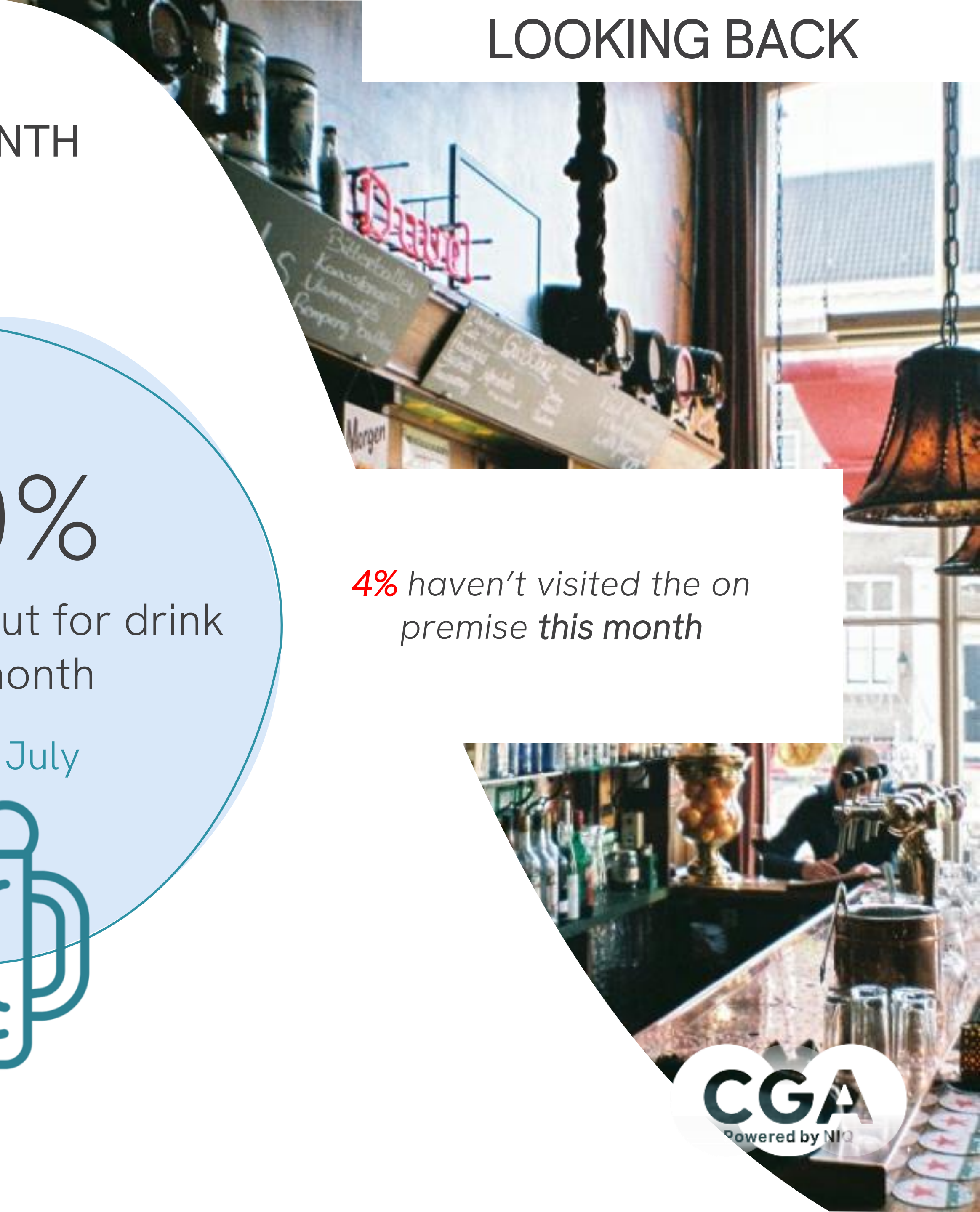
-2pp vs July

50%

Have been out for drink last month

+4pp vs July

*4% haven't visited the on premise **this month***



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JULY & AUGUST 2023 – SAMPLE: 1000,1003

VISITATION PLANS FOR THE ON PREMISE MONTH AHEAD

90%

Plan to go out to eat in next month

0pp vs July

52%

Plan to go out for a drink next month

+1pp vs July

*4% don't plan to visit the on premise **next month***

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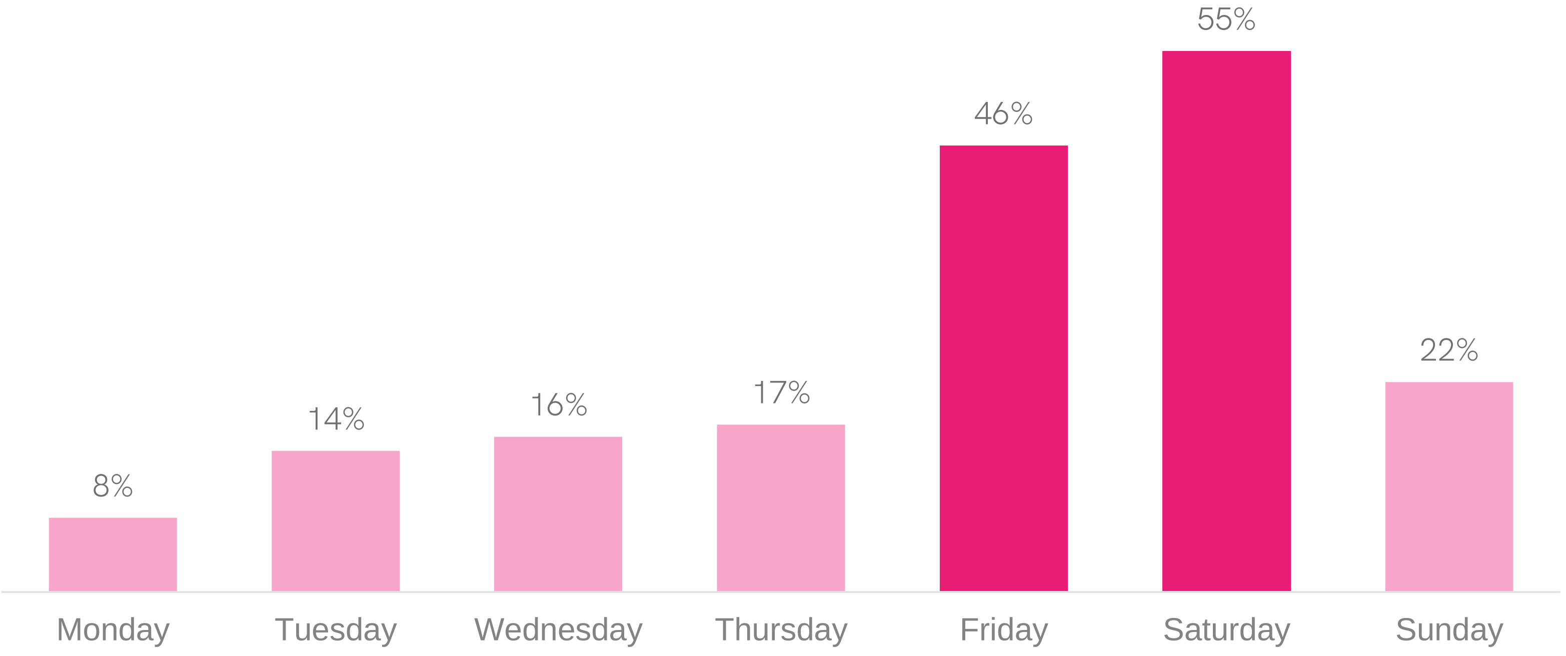
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JULY & AUGUST 2023 – SAMPLE: 1000, 1003

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

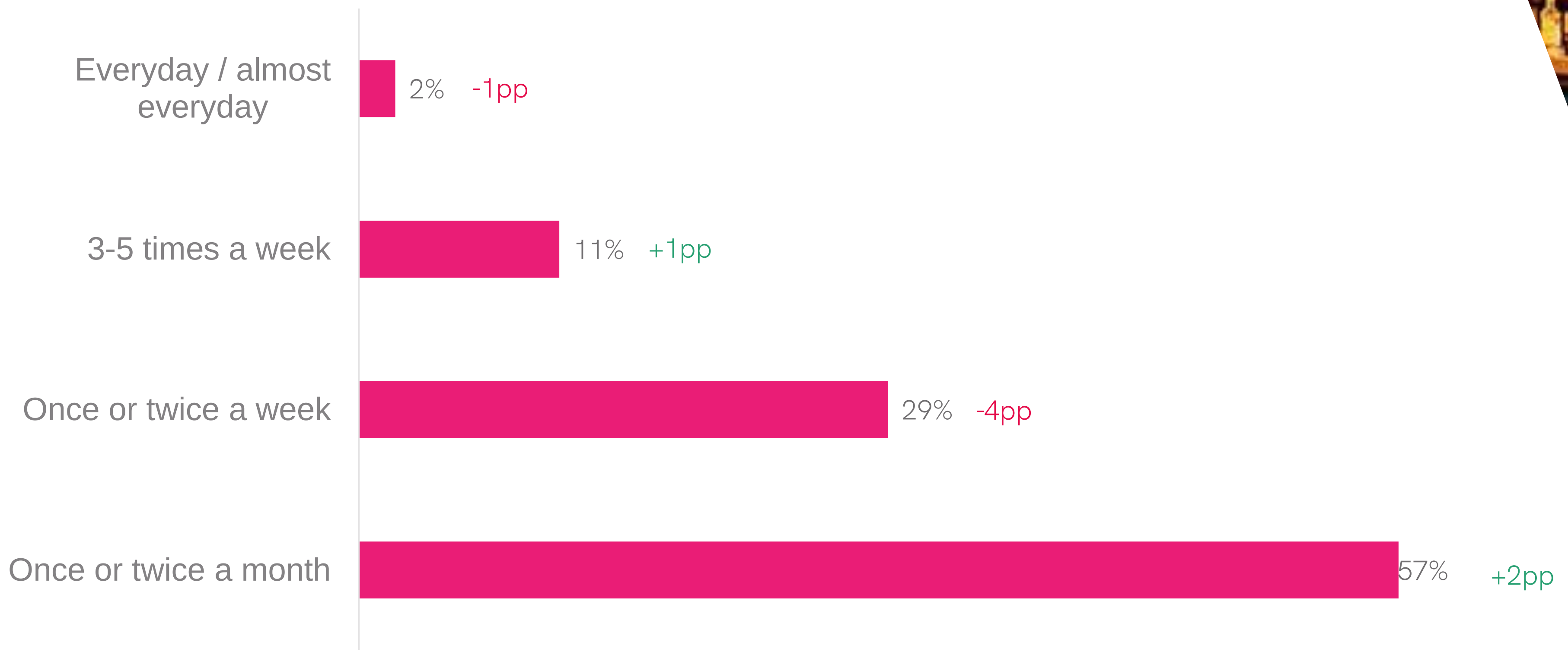
Days of the week visited



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JULY & AUGUST 2023 – SAMPLE: 962, 966

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

Visiting habits (vs July)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JULY & AUGUST 2023 – SAMPLE: 962,966

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

Change in frequency of visitation

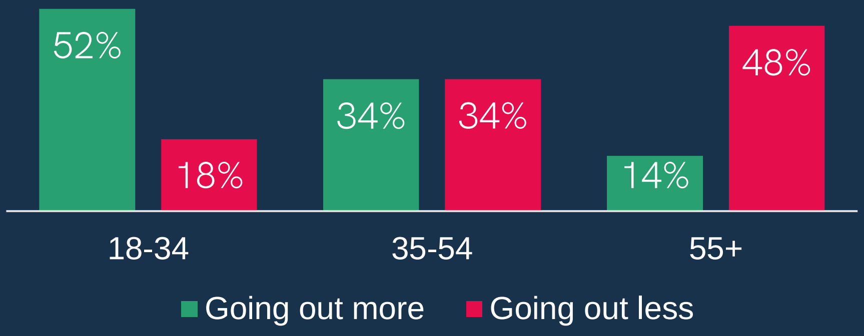
20%	43%	37%
Going out more often	Going out the same	Going out less often
+1pp vs July	-5pp vs July	+4pp vs July

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JULY & AUGUST 2023 – SAMPLE: 1000,1003

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

♂ 46% 45%

♀ 54% 55%

Location of residence

67% 46%

City centre / town centre

33% 54%

Rural / suburban

Average household income

€ 45,909

€ 40,180

Typically visits the On-Premise...

At least weekly 78% 21%

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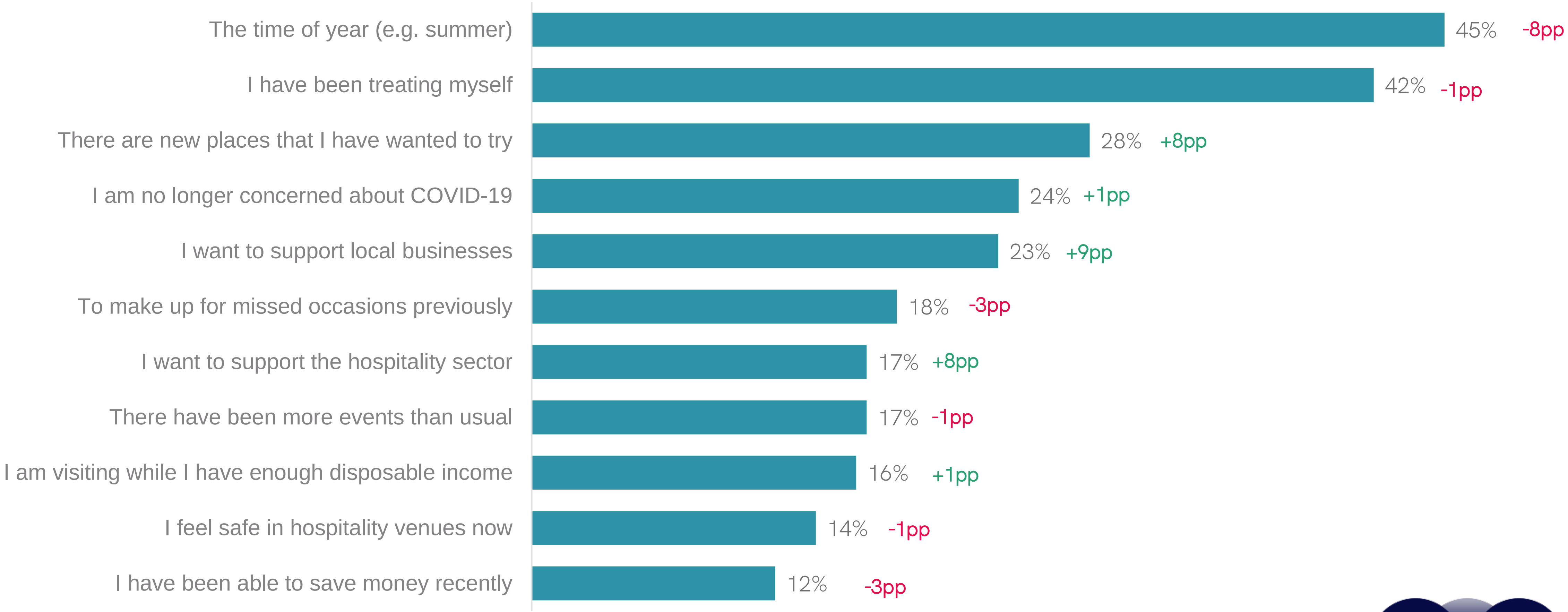
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT AUGUST 2023 – SAMPLE: Germany more 198, less 374

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

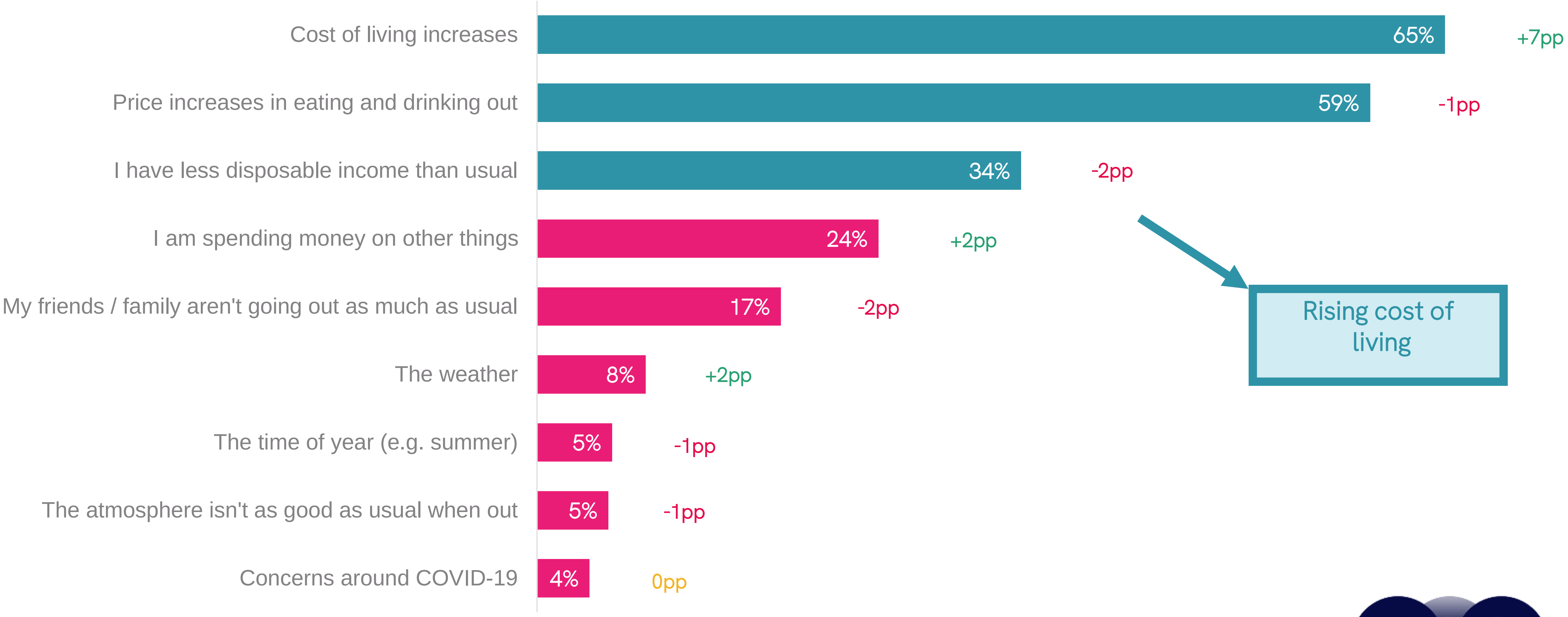
Reasons for going out to the on premise more frequently than usual (vs July)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JULY & AUGUST 2023 – SAMPLE: 192, 198

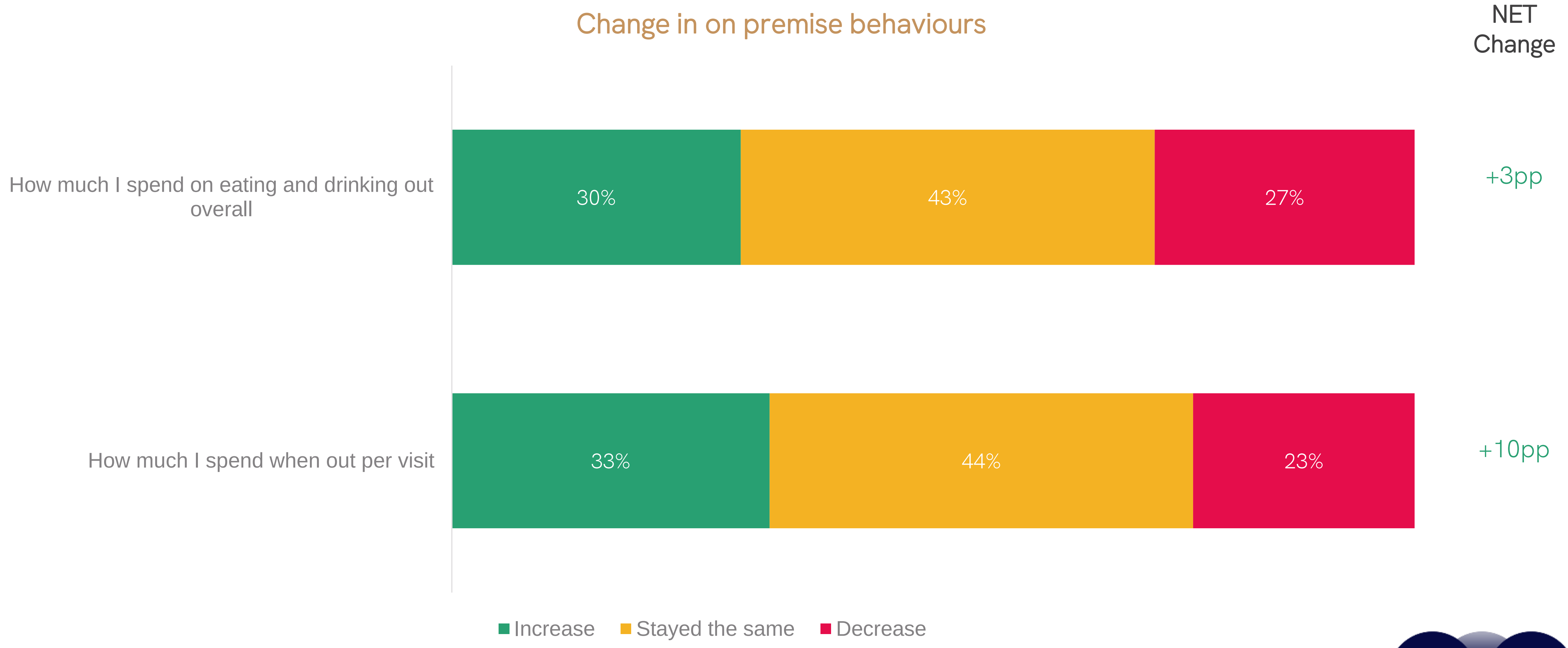
YOU SAID THAT YOU ARE CURRENTLY GOING OUT LESS FREQUENTLY THAN USUAL, WHY IS THIS?

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



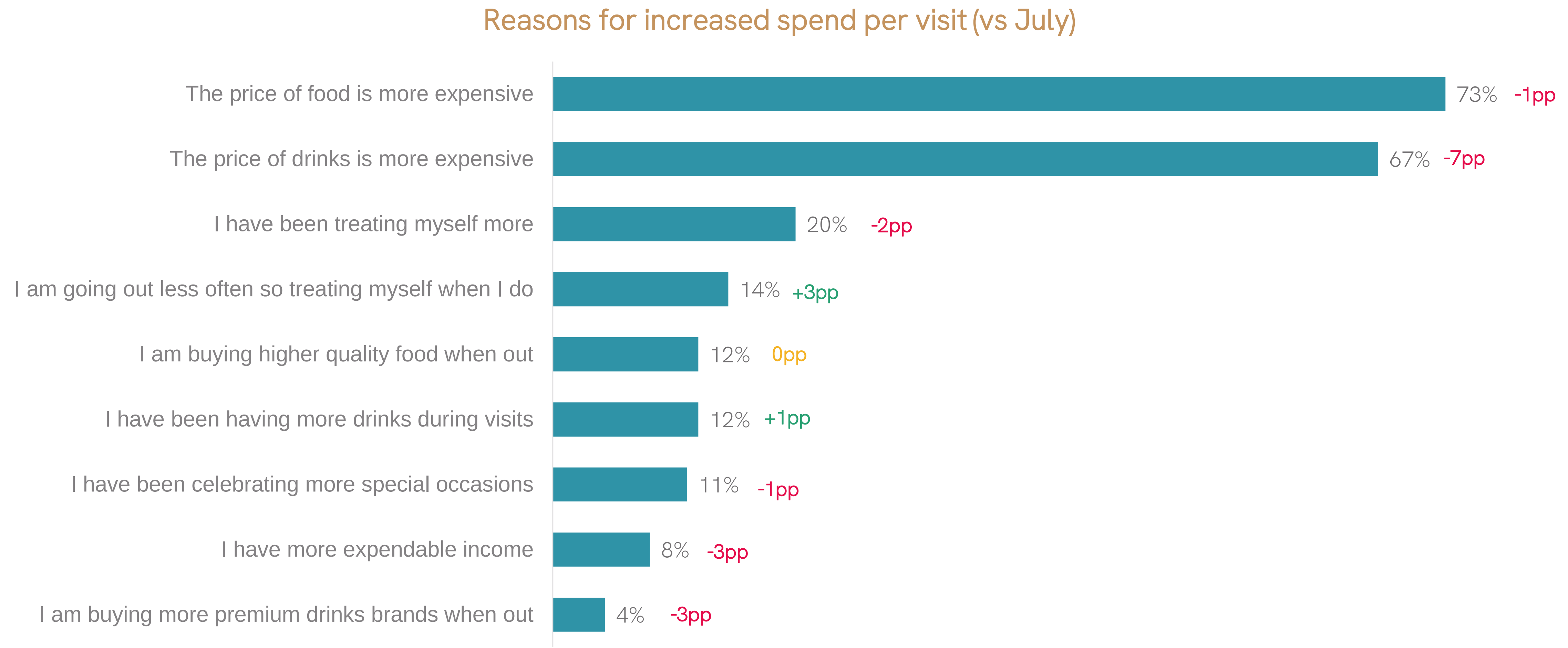
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JULY & AUGUST 2023 - SAMPLE: 327, 374

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 AUGUST 2023 – SAMPLE: 1003

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



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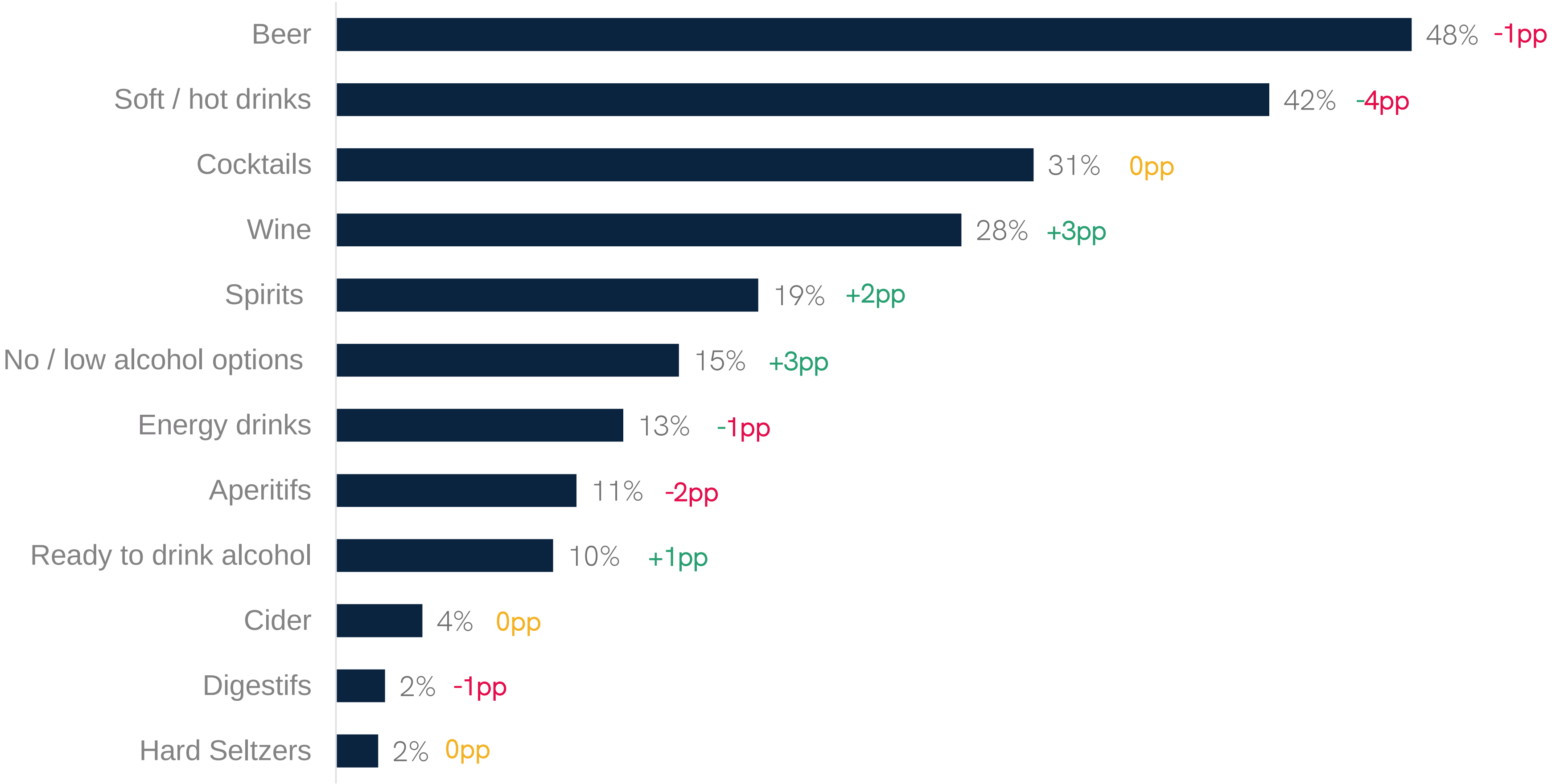
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JULY & AUGUST 2023 - SAMPLE: 314, 329

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 JULY & AUGUST 2023 – SAMPLE: 214, 234

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

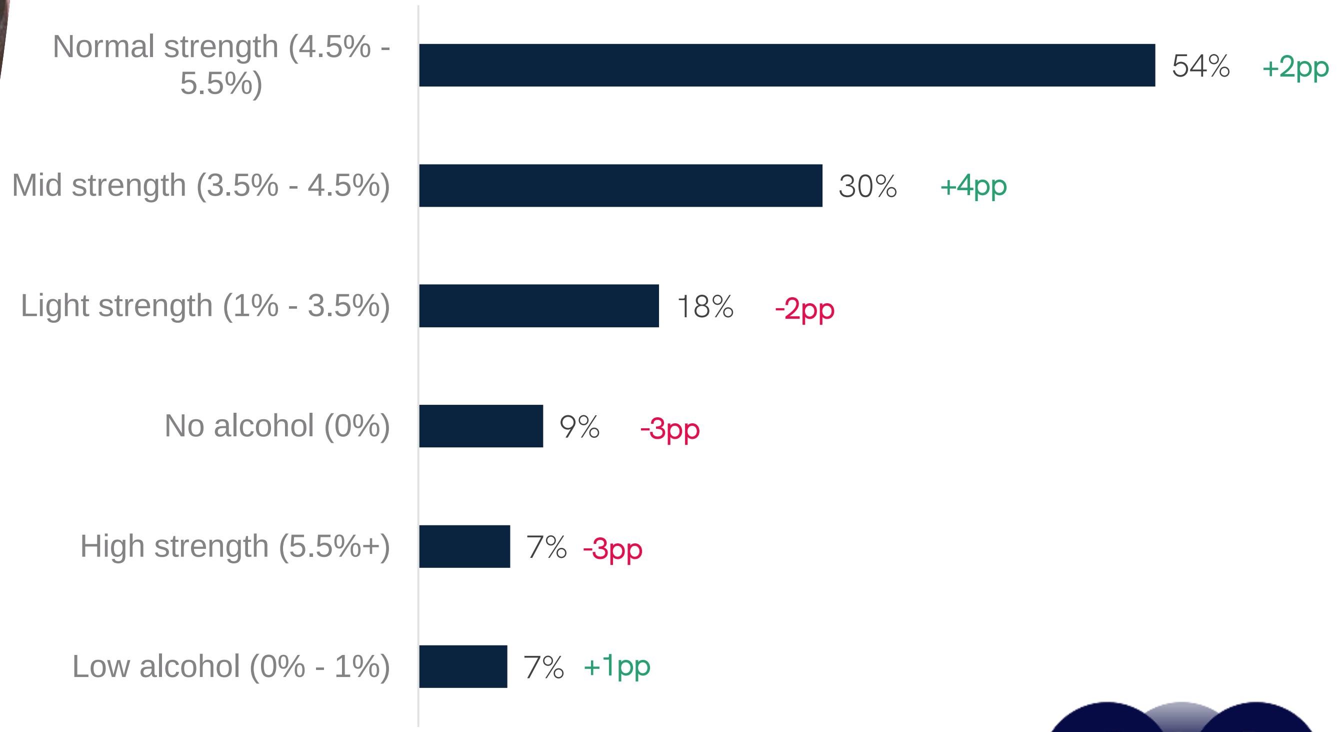
Drink choice of those who have visited the On Premise in the past month (vs July)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JULY & AUGUST 2023 – SAMPLE: 962, 1000

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 July)



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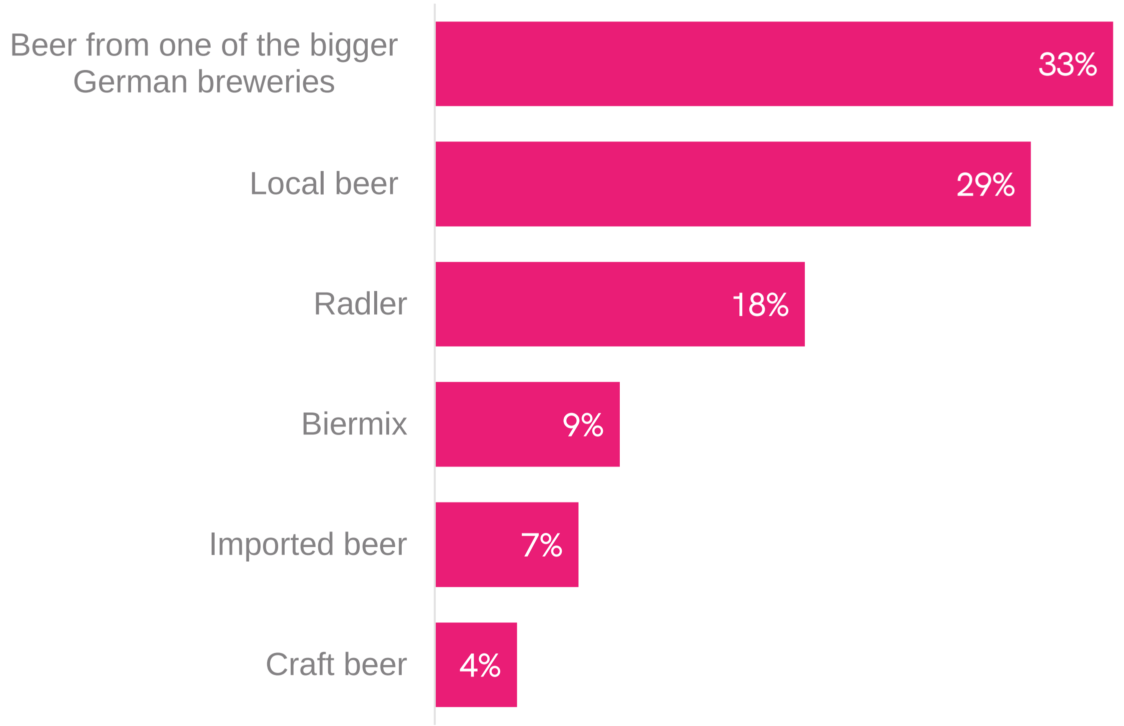
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JULY & AUGUST 2023 – SAMPLE: 461, 469

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



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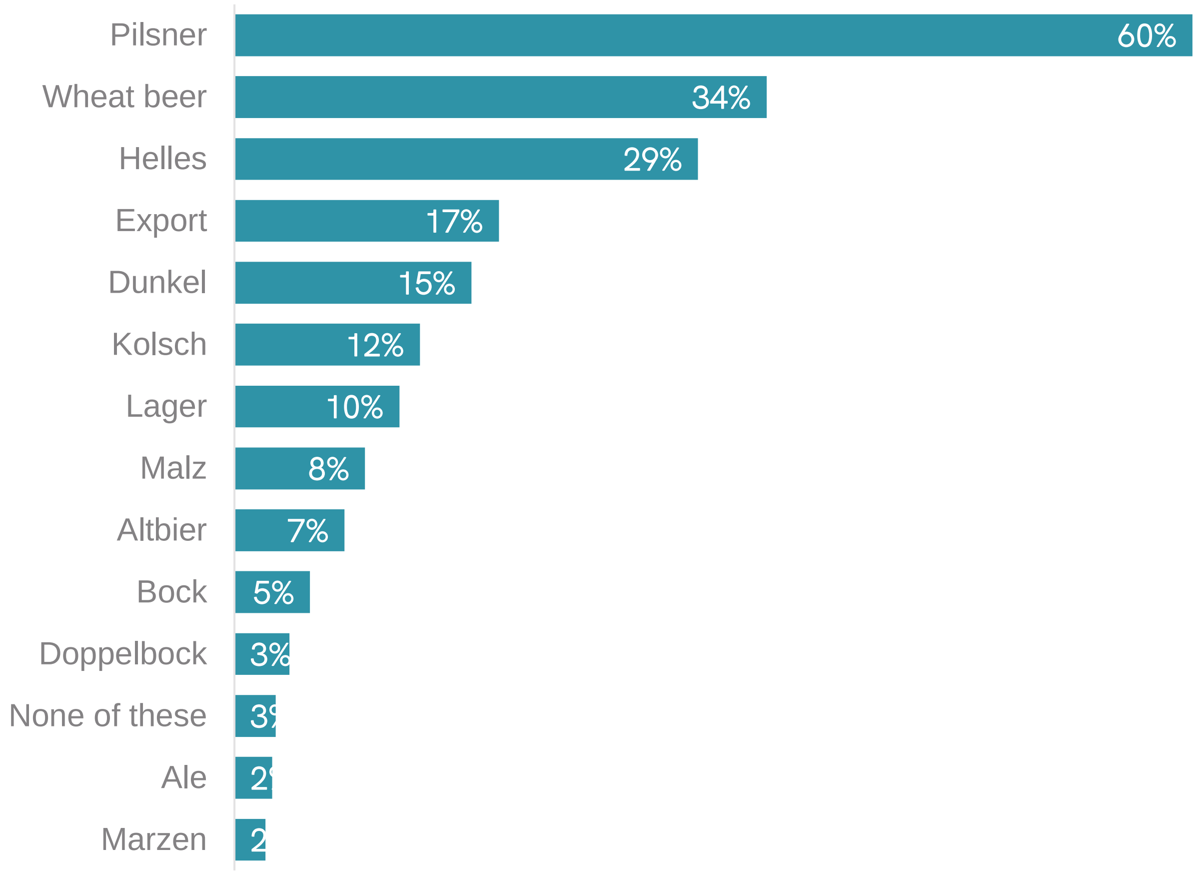
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JULY 2023 – SAMPLE: 806

WHICH OF THE FOLLOWING TYPES OF BEER HAVE YOU DRUNK IN THE PAST MONTH?

Types of beers consumers have drunk in the past month



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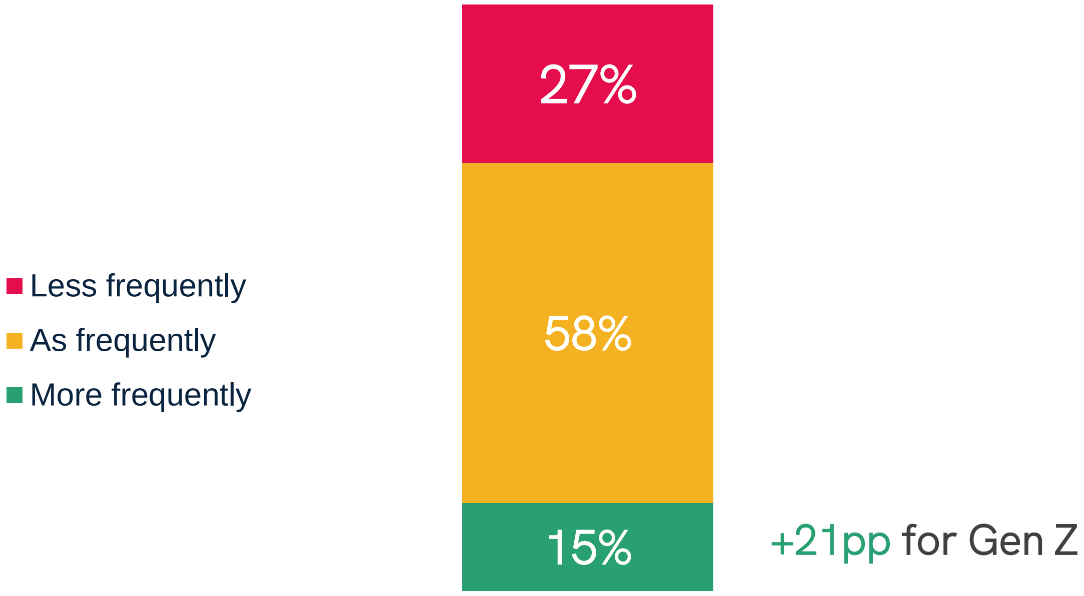
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JULY 2023 – SAMPLE: 462

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



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SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JULY 2023 – SAMPLE: 1003

HOT TOPICS – HOLIDAYS

HOT TOPICS…

HOLIDAYS

- The majority of consumers visit both casual and formal restaurants when on holiday, with the most increase seen for hotels and beach bars compared to typical visitation. Understanding key consumer hot spots on holiday will unlock opportunity for increased revenue.

- Most prominently, visitors drink mostly between 1-5 serves in the On Premise when they're on holiday, with nearly 1 in 3 consumers drinking more drinks on holiday than they usually would, emphasising the opportunity here.

- Cocktails presents the biggest opportunity on holidays, with 2 in 5 consumers drinking cocktails more here than usual. Drive key factors consumers look for on holiday, such as relaxation and refreshment, in these serves in the key hotspots of beach clubs, hotels and restaurants

- It is also important to be present in secondary venues such as street markets and festivals, with high visitation rates for these over the summer

WHICH OF THE FOLLOWING VENUES DO YOU TYPICALLY VISIT WHEN ON HOLIDAY?

Casual dining restaurant	Beach bar	Formal dining restaurant	Hotel
61%	49%	46%	45%

Bar	International pub (e.g., Irish Pub)	Nightclub
43%	15%	14%

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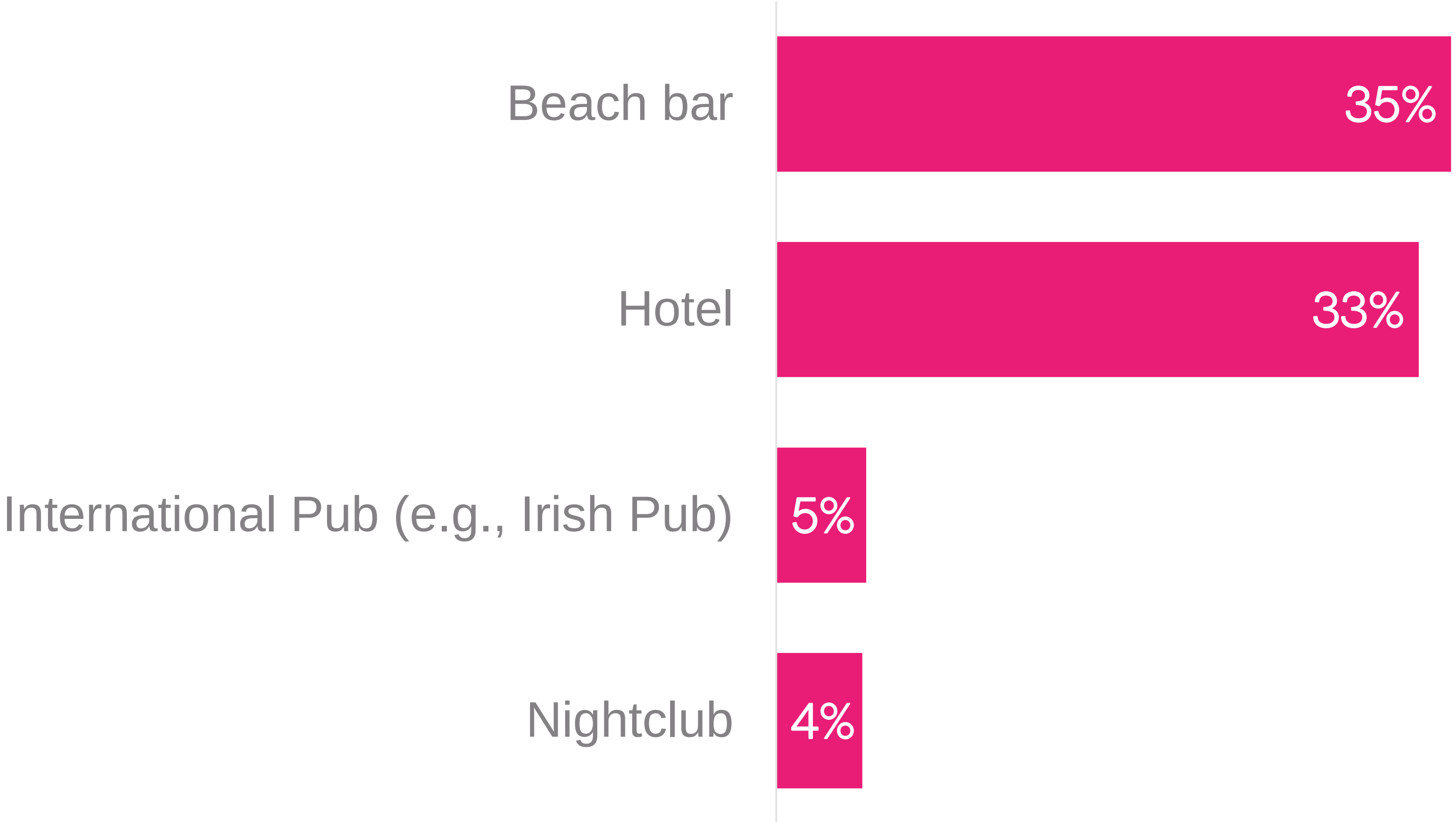
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT AUGUST 2023 – SAMPLE: 1004

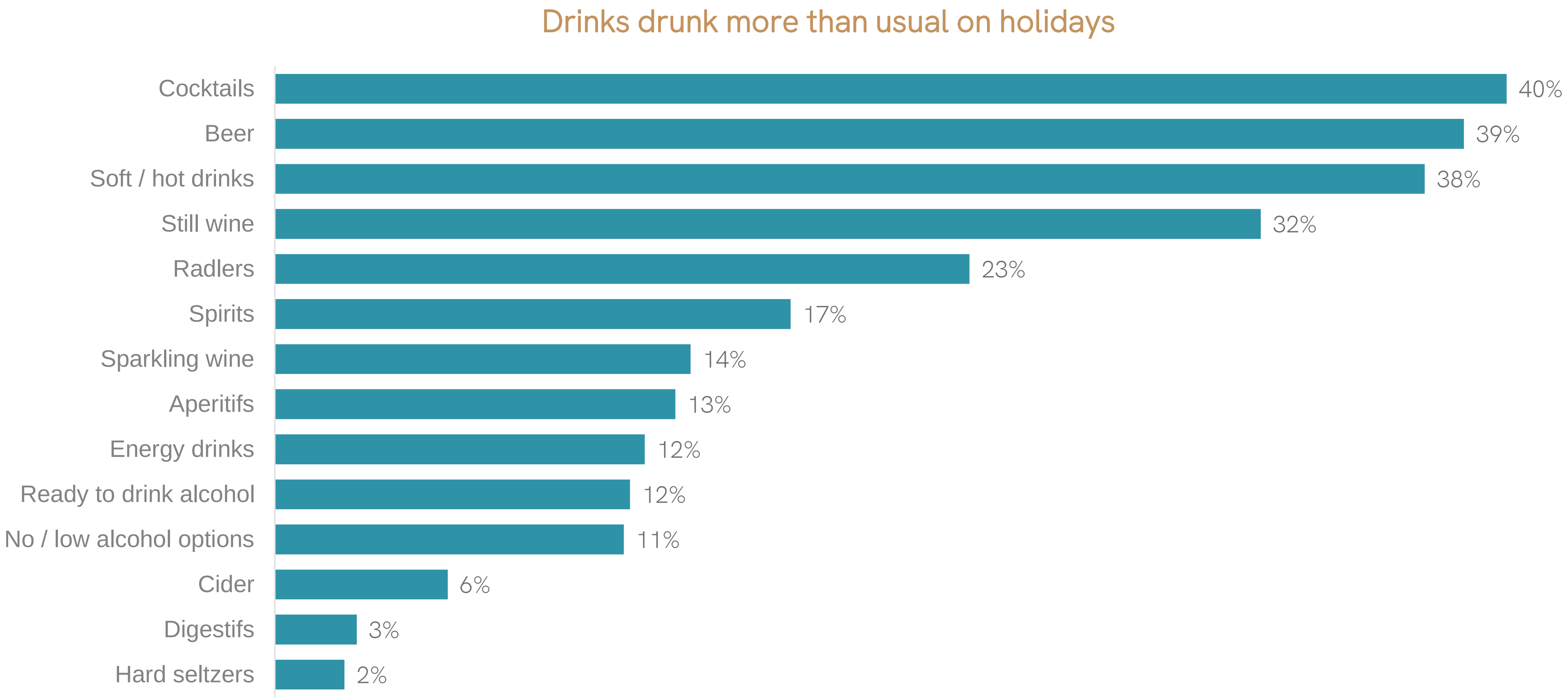
TOP 5 VENUES CONSUMERS VISIT MORE OFTEN ON HOLIDAY VS TYPICAL VISITATION

Top over-indexing venues on holiday vs typical behaviour



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT JULY 2023 - SAMPLE: 1000

WHEN ON HOLIDAY, WHICH OF THE FOLLOWING DRINKS DO YOU DRINK MORE THAN USUAL?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT AUGUST 2023 – SAMPLE: 1003

WHEN ON HOLIDAY HOW MANY SERVES OF DRINKS DO YOU TYPICALLY CONSUME WHEN AT BARS, RESTAURANTS OR CAFES? (INCLUDING BOTH ALCOHOLIC OR NON-ALCOHOLIC DRINKS)

Number of drink serves in the On Premise when on holiday

51%	39%	4%	2%
1-2 serves	3-5 serves	6-9 serves	10+ serves

3% of consumers selected 'Less than 1'

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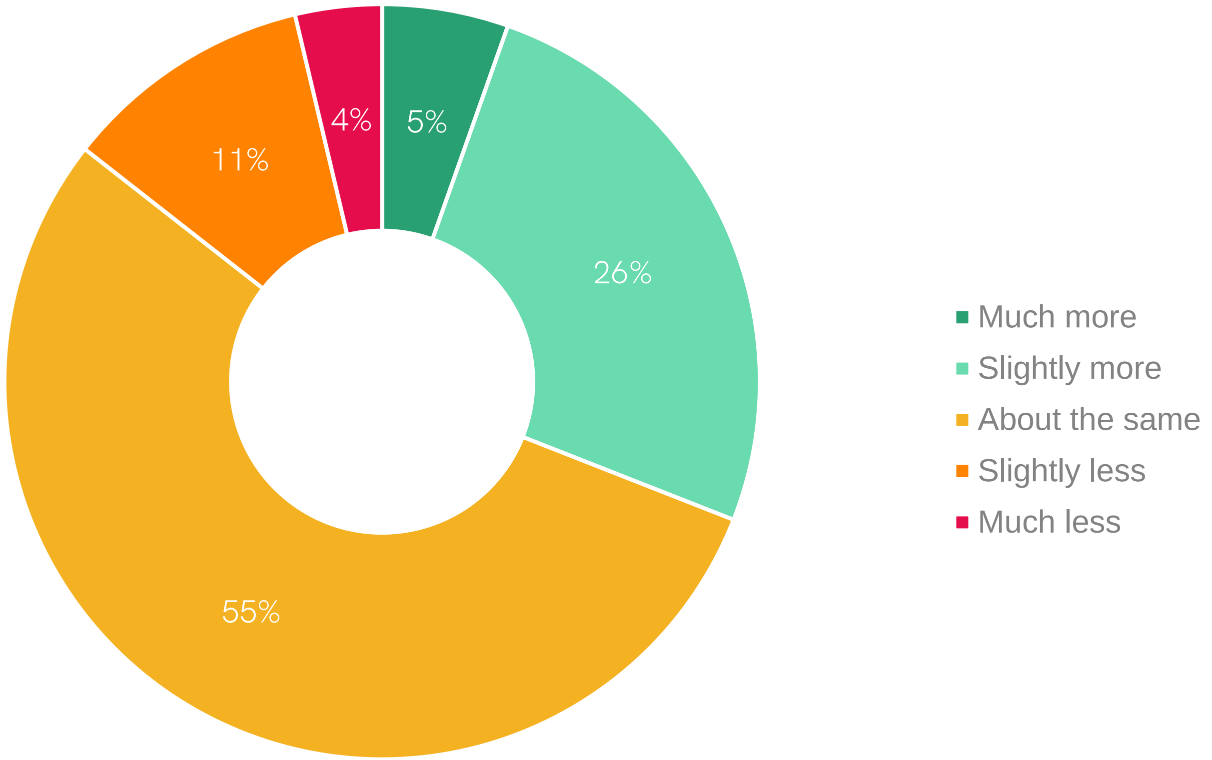
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT AUGUST 2023 - SAMPLE: 1004

IS THIS MORE OR LESS DRINKS THAN YOU WOULD TYPICALLY HAVE WHEN AT BARS, RESTAURANTS OR CAFES WHEN NOT ON HOLIDAY?

Drink serve consumption in the On Premise vs on holiday



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

WHEN ON HOLIDAY, WHY DO YOU CHOOSE TO DRINK YOUR CHOICE OF DRINK? PLEASE SELECT ALL THAT APPLY

Reasons for drink choice when on holiday (Top 10)

To savour	60%
To relax	41%
To refresh myself	40%
To enjoy	39%
For a treat	36%
To have fun	34%
To socialise	26%
To cool down / warm up	24%
To celebrate	13%
To energise/give me a boost	6%

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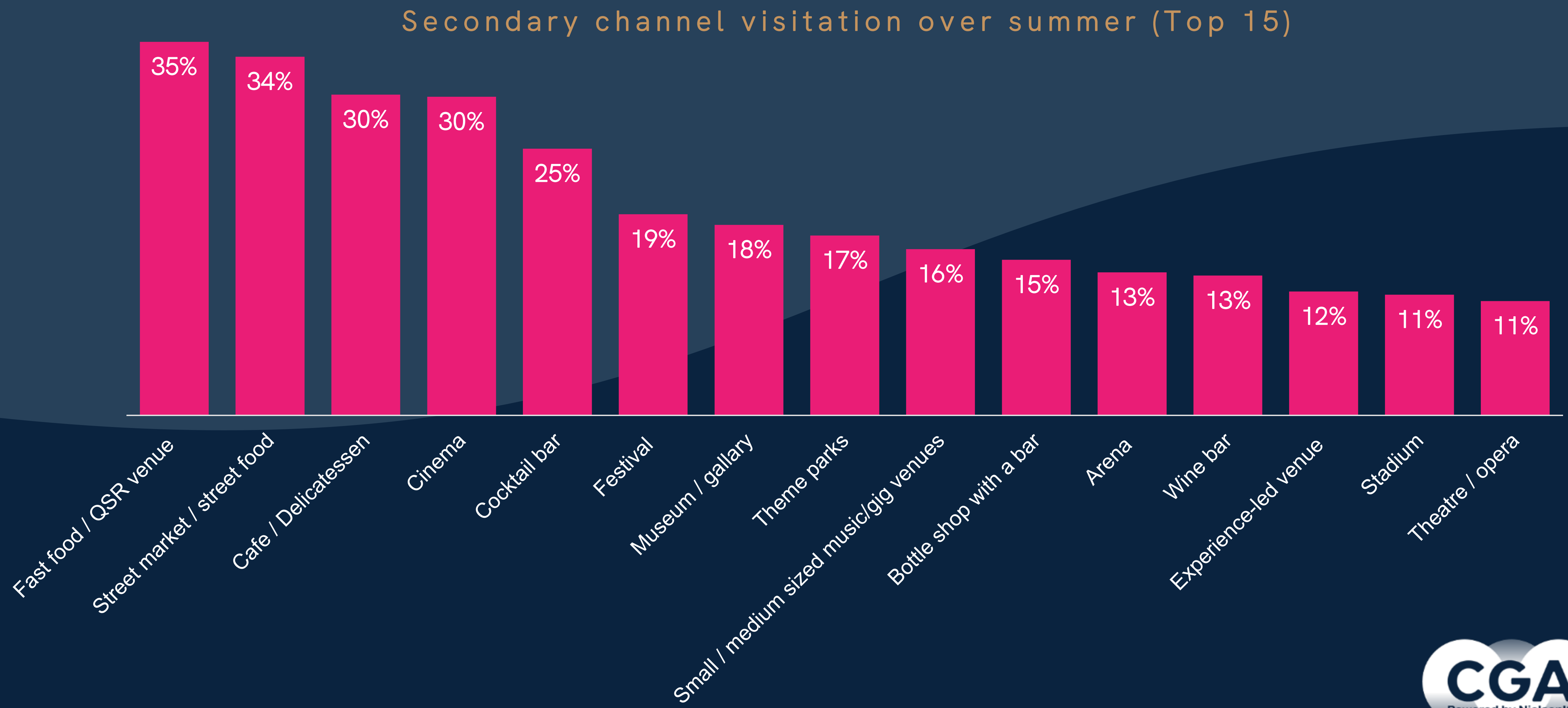
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT AUGUST 2023 – SAMPLE: 1003

WHICH OF THE FOLLOWING HAVE YOU VISITED, OR ARE YOU PLANNING TO VISIT OVER THE WHOLE OF THE SUMMER?



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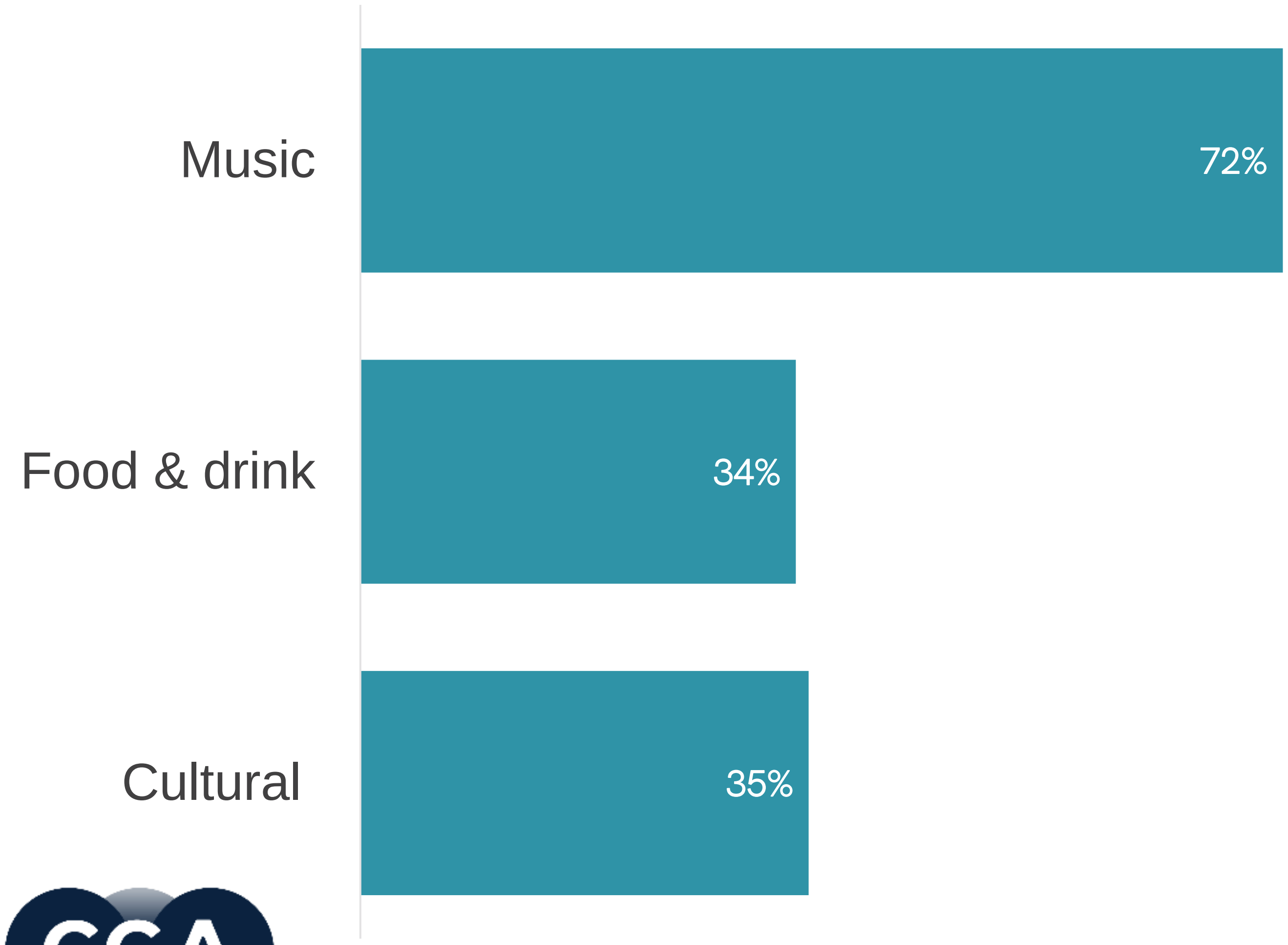
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT AUGUST 2023 – SAMPLE: 1003

YOU SAID THAT YOU HAVE, OR YOU WILL BE ATTENDING A FESTIVAL BEFORE THE END OF 2023, WHAT TYPE OF FESTIVAL HAVE YOU ATTENDED OR WILL YOU BE ATTENDING?

Festival visitation over summer



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT AUGUST 2023 – SAMPLE: 190

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

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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 Europe 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.

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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.

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Contact Us

To learn more or to speak to a member of the team, please feel free to get in touch:

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