

A group of young people are gathered around a table, holding drinks with lemons and mint. The scene is set outdoors, possibly at a festival or social event. The background is slightly blurred, showing more people and greenery. The overall atmosphere is social and relaxed.

GERMANY ON PREMISE CONSUMER PULSE REPORT

CGA by NIQ, September 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 **September 2023** issue, we surveyed 1000 consumers (aged 18+) between 20th - 29th September. 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 such as wine and wine centred events and multi-purpose occasions

SUMMARY: TOPLINE VISITATION & INTENTION

- September visits have remained consistent with those made in August, with a high proportion (90%) of consumers eating out and just under half (47%) having been out for a drink in the last month.
- Intention to visit the On-Premise next month is in line with September visits, with a slight decrease (-2pp) in those who plan to eat out next month.
- In terms of frequency of visits, 1 in 5 consumers are going out more often, (consistent with August wave). However, there has been a drop in those who are going out less often (-7pp vs August) and an increase in those who are going out the same amount (+6pp).
- Whilst the cost of living and price increases are a barrier for those who are going out less frequently than usual, overall spend on eating and drinking out and per visit has increased.
- Those who are going out more often are typically younger and Gen Z. Gen Z are also planning to go out more frequently over the next month and typically spend more on eating and drinking out, making them a key demographic to be targeting and focusing strategy amidst the cost of living crisis.



KEY METRICS / ON PREMISE VISITATION



VISITATION IN THE ON PREMISE OVER THE PAST MONTH

90%

Have been out to eat
in the last month
+1pp vs August



47%

Have been out for a
drink in the last month
-3pp vs August



5% haven't visited the on
premise *this month*
+1pp vs August



VISITATION PLANS FOR THE ON PREMISE MONTH AHEAD

88%

Plan to go out to eat in the next month
-2pp vs August



53%

Plan to go out for a drink in the next month
+1pp vs August



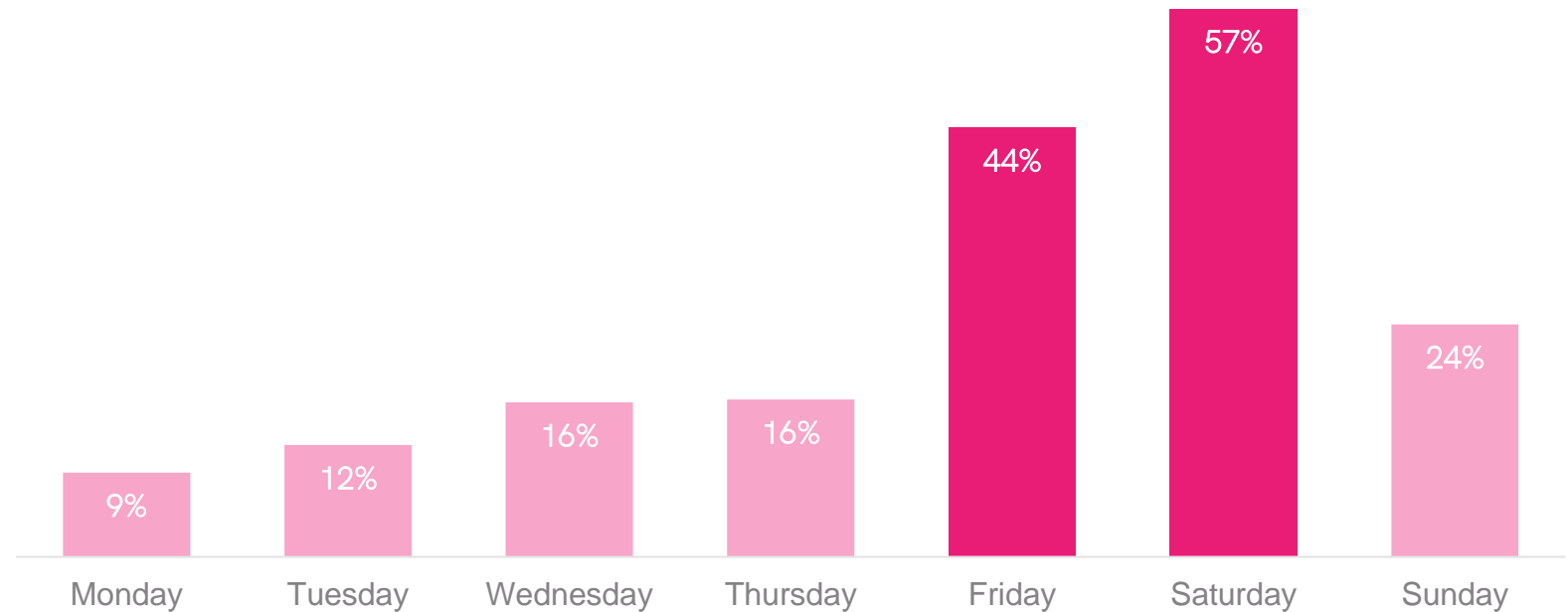
4% don't plan to visit the on premise next month
0pp vs August





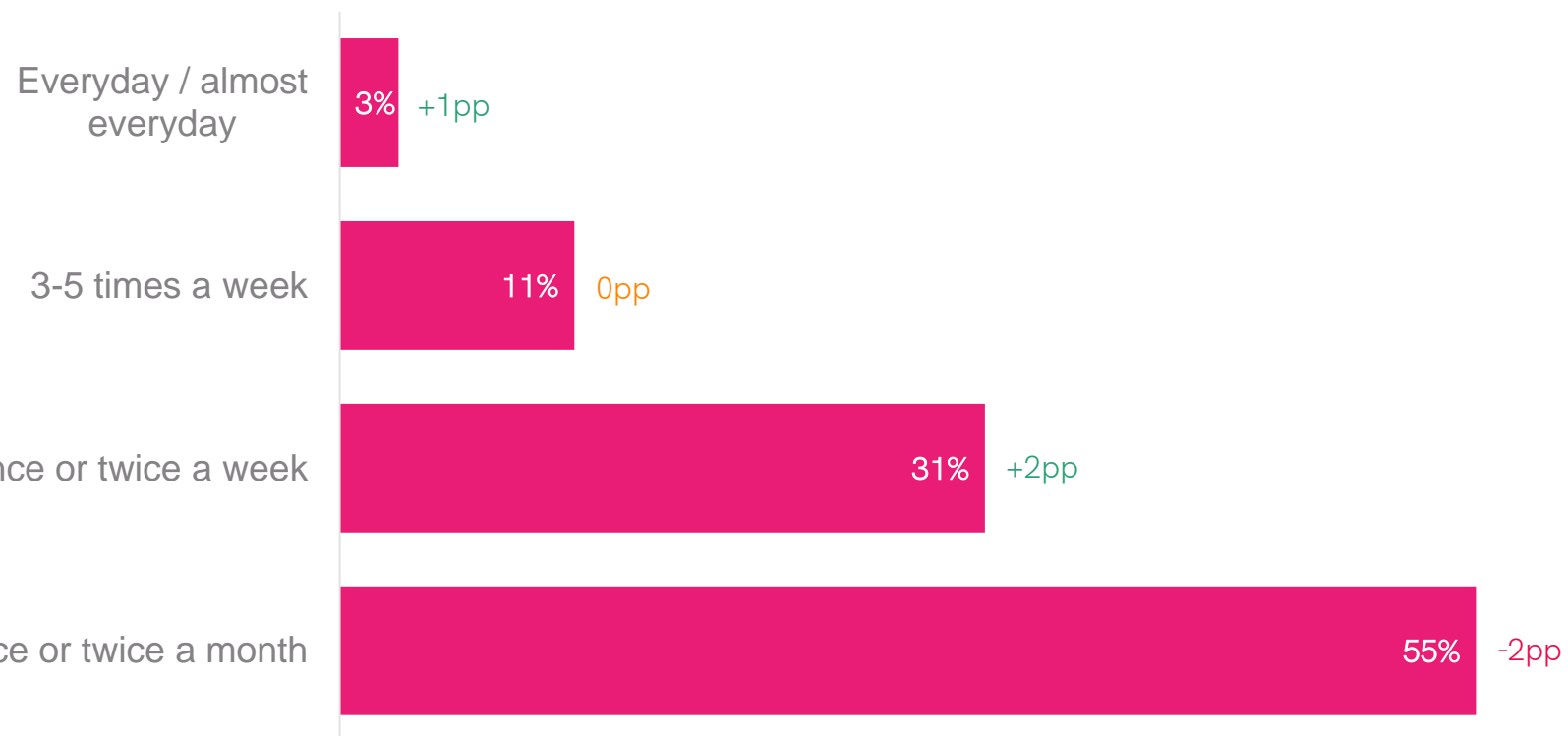
ON WHICH DAY(S) OF THE WEEK HAVE YOU VISITED A BAR, RESTAURANT OR OTHER SIMILAR VENUE OVER THE PAST MONTH?

Days of the week visited



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

Visiting habits (vs August)



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

Change in frequency of visitation



20%

Going out more often

= vs August



49%

Going out the same

+6pp vs August

31%

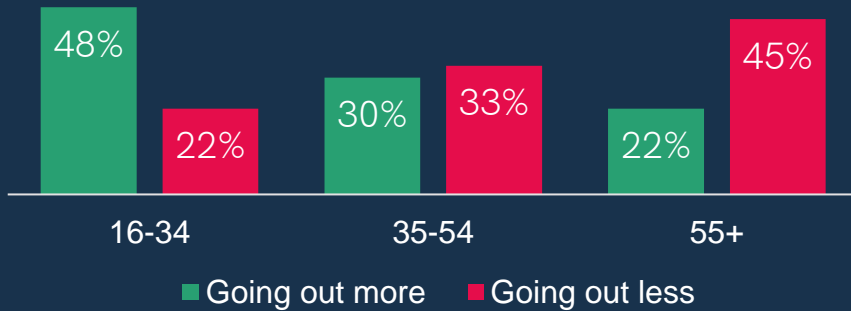
Going out less often

-7pp vs August

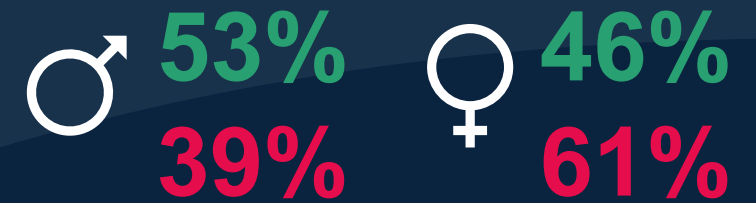
Those visiting the on premise more frequently than usual are typically younger, more likely to be located within the city / town centre and with a higher average household income than those who are visiting less often

Going out more | Going out less

Age groups



Gender



Location of residence



70% **50%**
City centre / town centre

30% **50%**
Rural / suburban

Average household income

€48,066

€44,479

Typically visits the On-Premise...

At least weekly **75%** **18%**



A background image showing a close-up of a glass filled with a golden beverage, likely a cocktail, with a lit sparkler or firework inside. The scene is festive and celebratory, with bright sparks and a warm glow. The image is partially obscured by two large, semi-transparent pink shapes that serve as text containers.

38%

Of Gen Z are going out
more often **this** month

+17pp vs average
consumer

33%

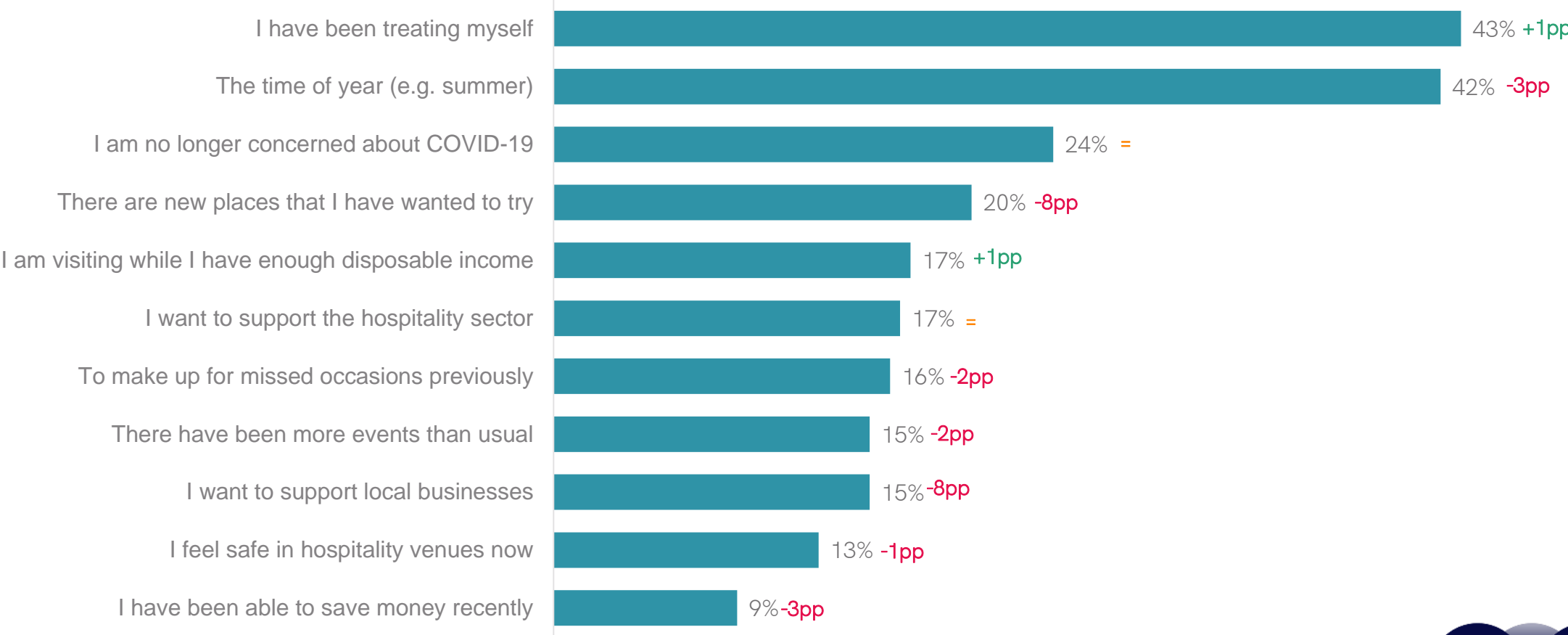
Of Gen Z are spending
more overall on eating
and drinking out this
month

+7pp vs average
consumer



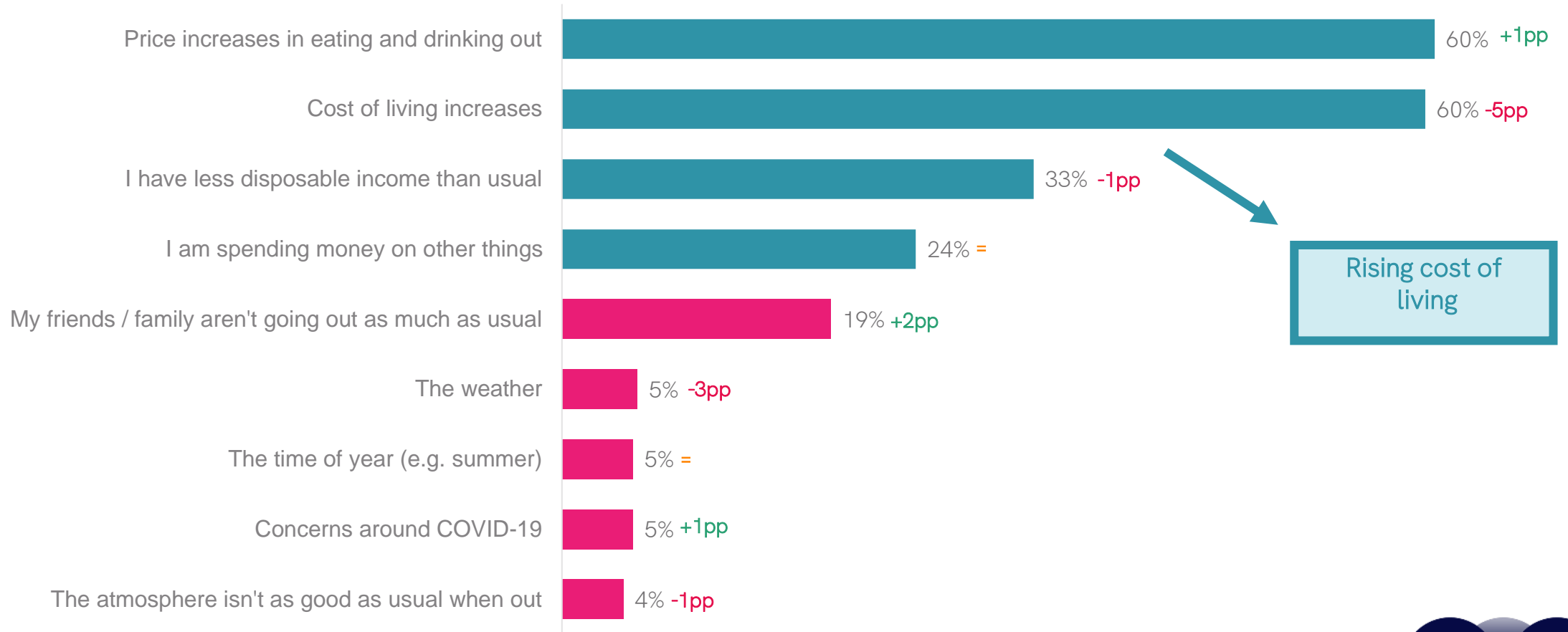
YOU HAVE SAID THAT YOU ARE CURRENTLY GOING OUT MORE FREQUENTLY THAN USUAL, WHY IS THIS?

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



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 Aug)

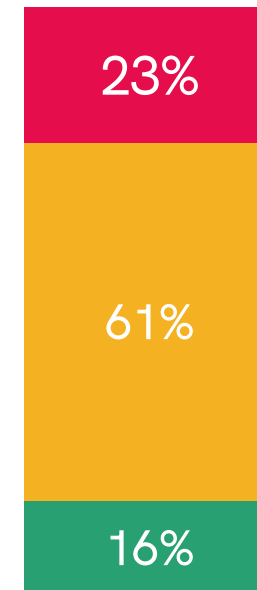




HOW OFTEN DO YOU PLAN TO VISIT BARS, RESTAURANTS OR OTHER SIMILAR VENUES OVER THE NEXT MONTH?

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

- Less frequently
- As frequently
- More frequently

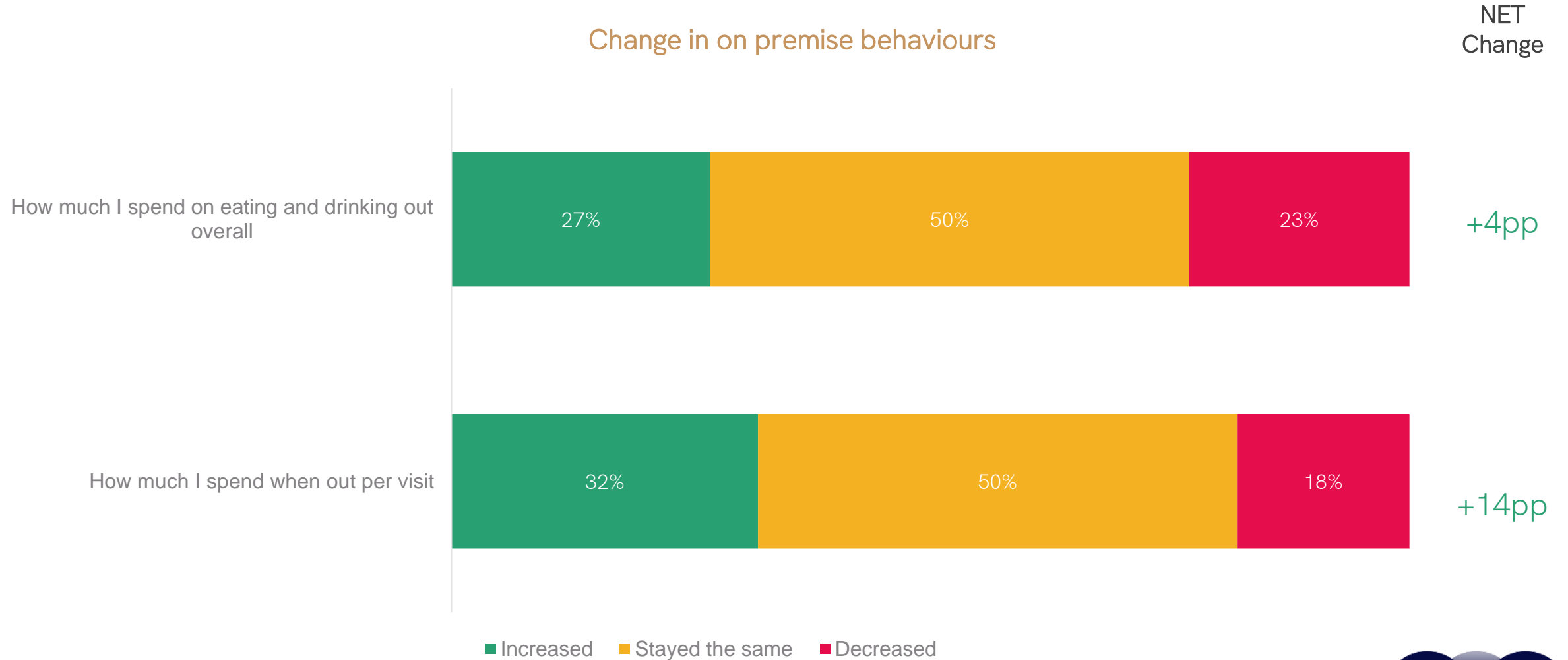


+23pp for Gen Z



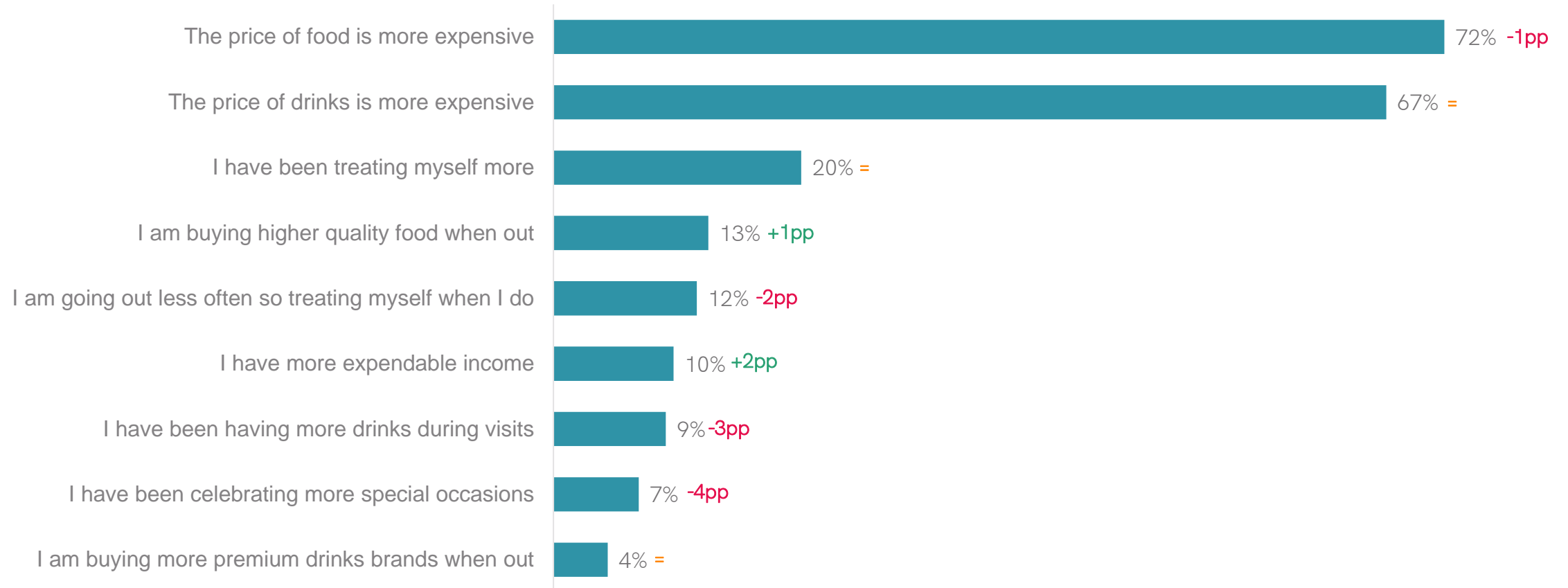
HAVE YOU CHANGED YOUR BEHAVIOUR IN ANY OF THE FOLLOWING WAYS OVER THE PAST MONTH, COMPARED TO USUAL, IN BARS, RESTAURANTS AND SIMILAR VENUES?

Change in on premise behaviours



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 Aug)



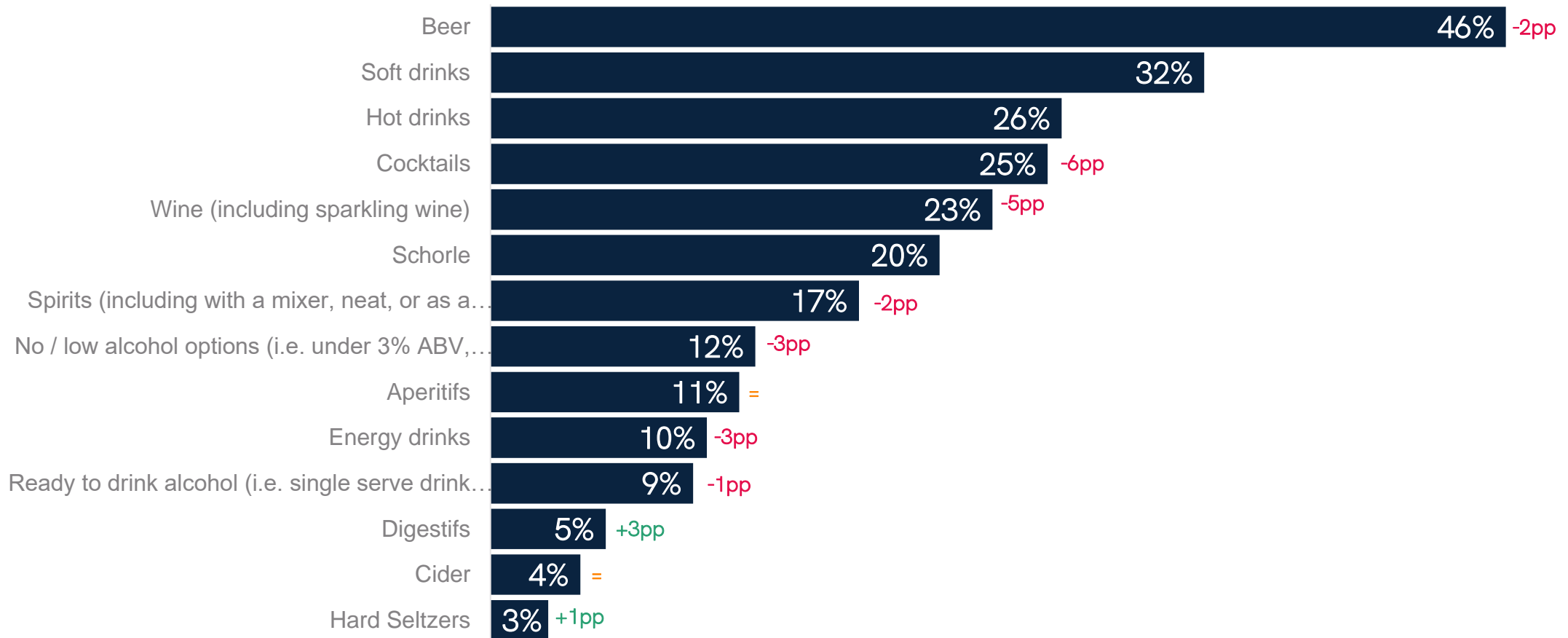
WHICH IF ANY OF THE FOLLOWING ARE REASONS WHY YOU ARE SPENDING LESS NOW WHEN OUT PER VISIT IN BARS, RESTAURANTS AND OTHER SIMILAR VENUES?

Reasons for decreased spend per visit (vs Aug)



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

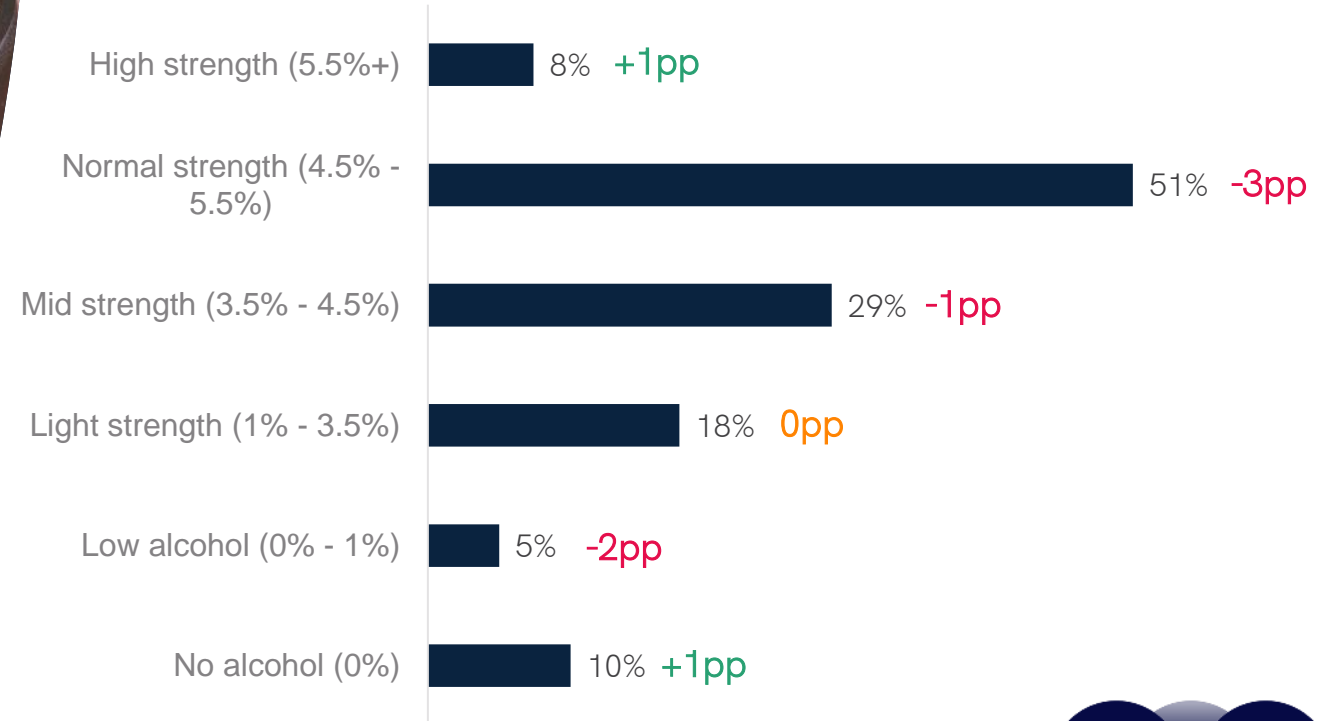
Drink choice of those who have visited the On Premise in the past month (vs Aug)





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

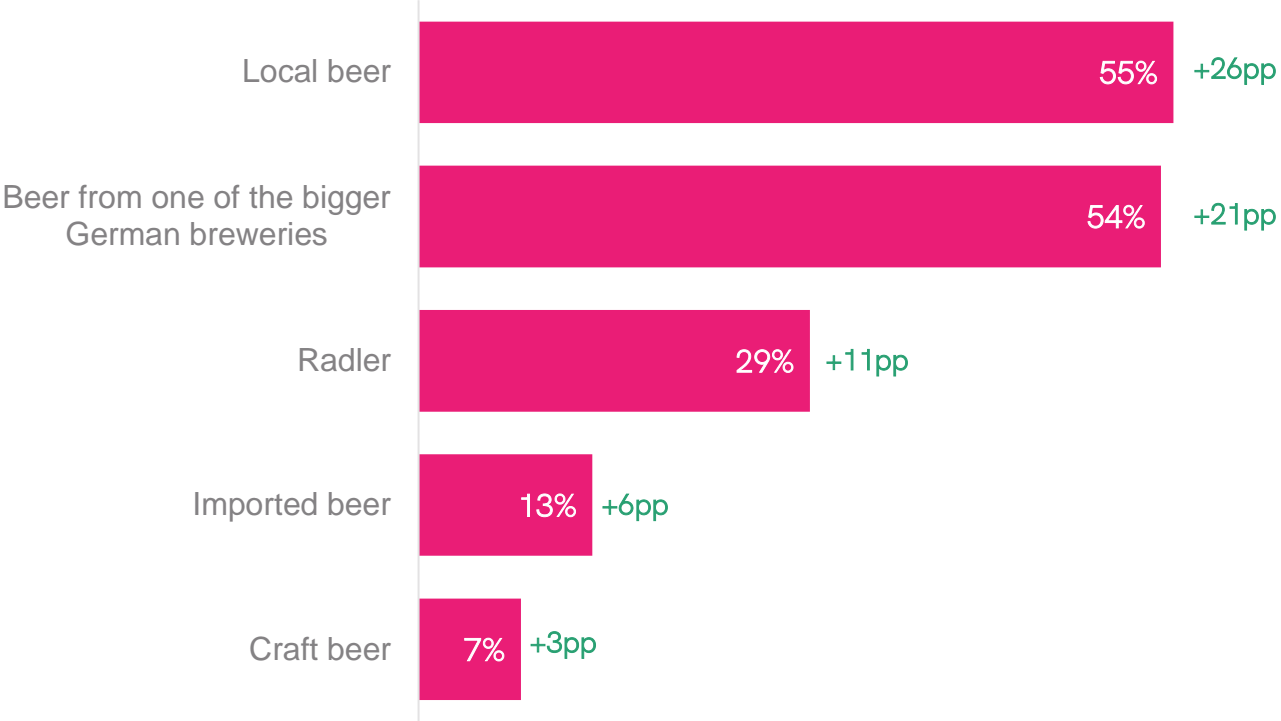
Strengths of beer consumers have drunk in the past month (vs average over past month)





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 Aug)





HOT TOPICS

HOT TOPICS...

- There is clear appetite from consumers for wine-centred events, with a wine and food pairing dinner particularly popular and wine festivals. With Gen Z also being more likely to opt for wine when out in the past month, wine centred events could provide a further opportunity to attract this consumer group.
- There is also great opportunity in multi-purpose channels, where people like the overall atmosphere and vibes. Being generally more experiential consumers, these venues are particularly popular with Gen Z and should be considered as part of any Gen-Z strategy. Increasing multi-purpose venues choice in multiple areas will target the right consumers and boost sales.
- As well as Rugby, big opportunities in the On Premise in 2024 for the arrival of the football UEFA euro cup, with almost 1 in 3 consumer planning to watch

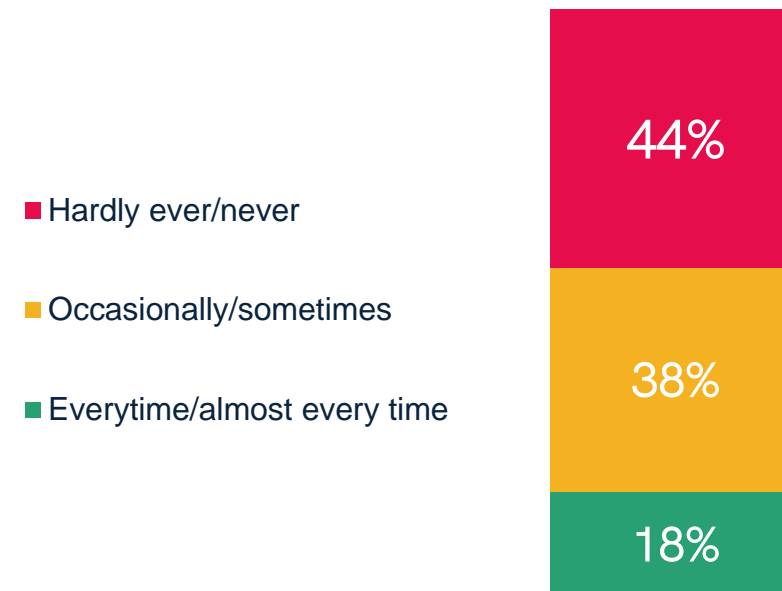


Hot topic - Wine



HOW FREQUENTLY, IF AT ALL, DO YOU TYPICALLY DRINK WINE WHEN OUT?

Frequency of drinking Wine when out this month



+6pp for Gen Z



HOW FREQUENTLY HAVE YOU BEEN DRINKING, OR DO YOU PLAN TO DRINK, WINE IN BARS, RESTAURANTS, AND OTHER SIMILAR VENUES THIS MONTH/NEXT MONTH COMPARED TO USUAL?

Change in frequency of drinking Wine



10%

Drinking more than usual

+16pp for Gen Z



66%

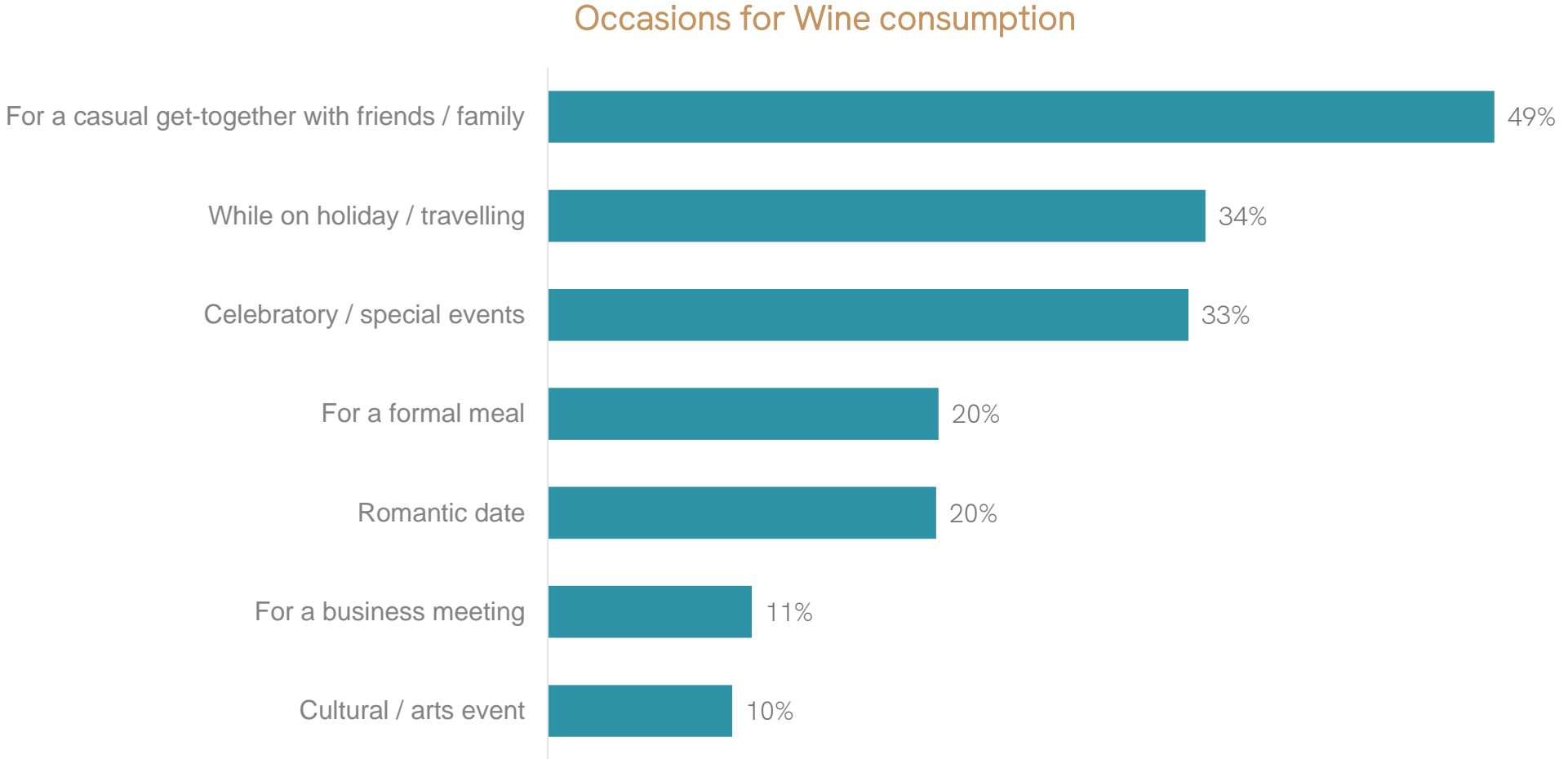
Drinking the same



24%

Drinking less than usual

DO YOU HAVE PLANS TO DRINK WINE IN BARS, RESTAURANTS, OR OTHER SIMILAR VENUE FOR ANY OF THE FOLLOWING OCCASSIONS THIS, OR NEXT MONTH?

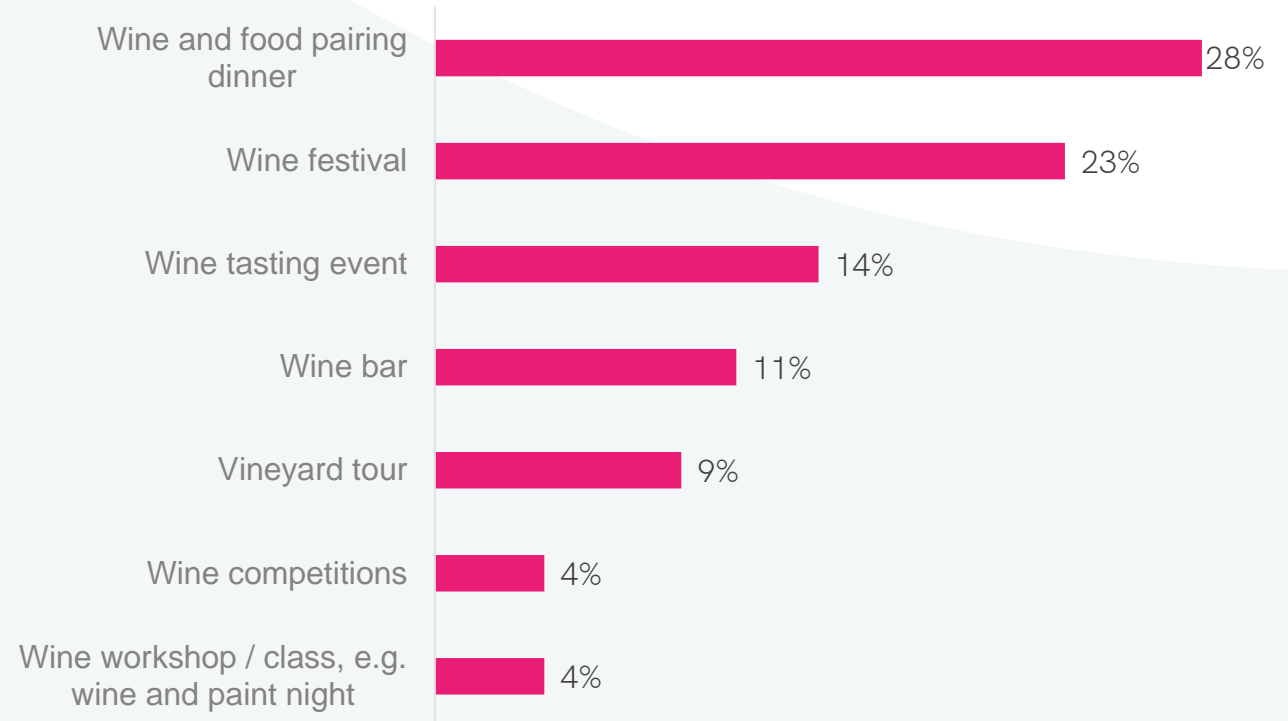


ARE YOU PLANNING ON VISITING, OR HAVE YOU VISITED, ANY OF THE FOLLOWING WINE-CENTERED EVENTS OVER THE NEXT FEW MONTHS?

% of those who visited or will visit the following Wine centered events

59%

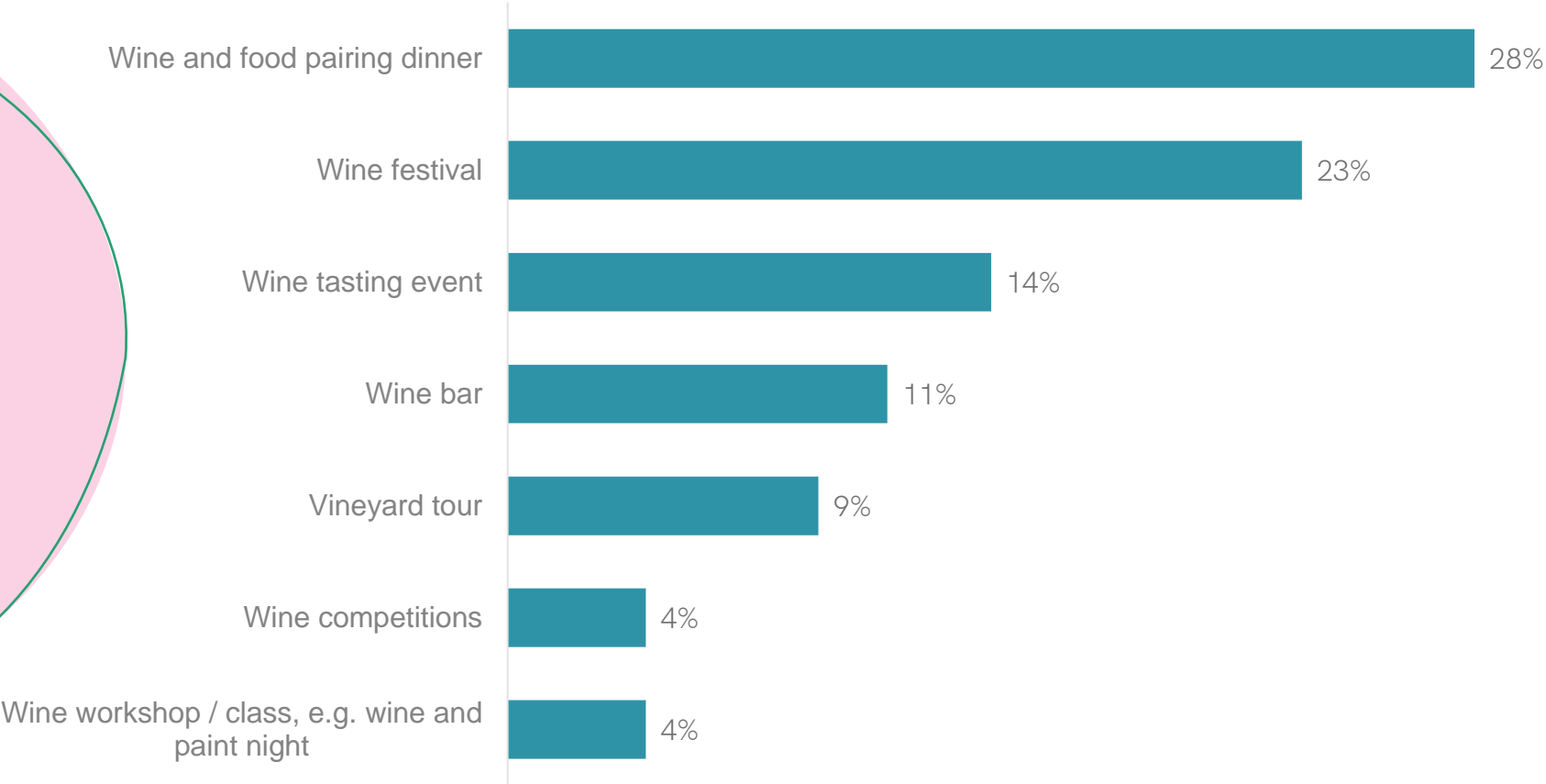
Have been or planning to wine-centred events over next few months



WHICH OF THE FOLLOWING WINE-CENTERED EVENTS, IF ANY, WOULD YOU BE INTERESTED IN VISITING?

% of those interested in Wine-centered events

88%
Of wine drinkers are interested in visiting a wine centred event





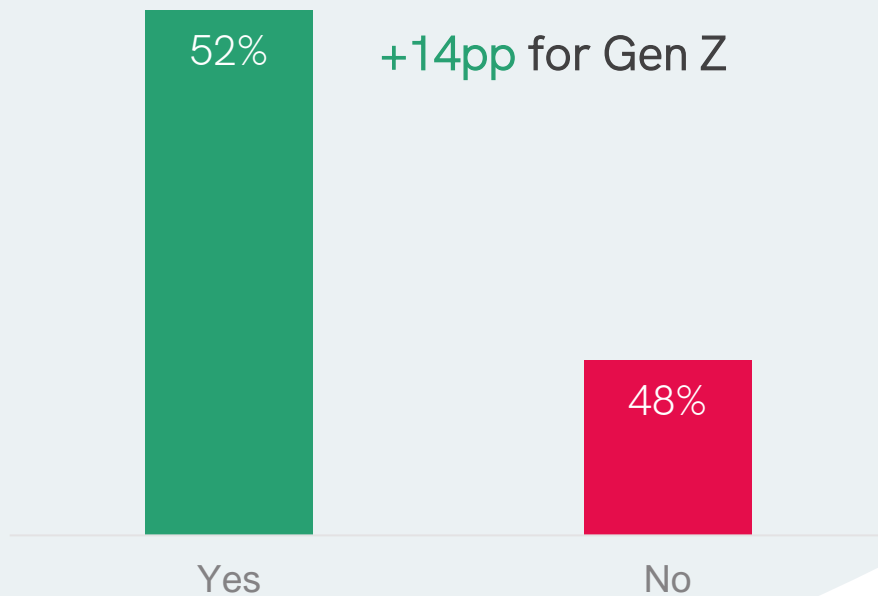
Hot topic – Multi-purpose venue



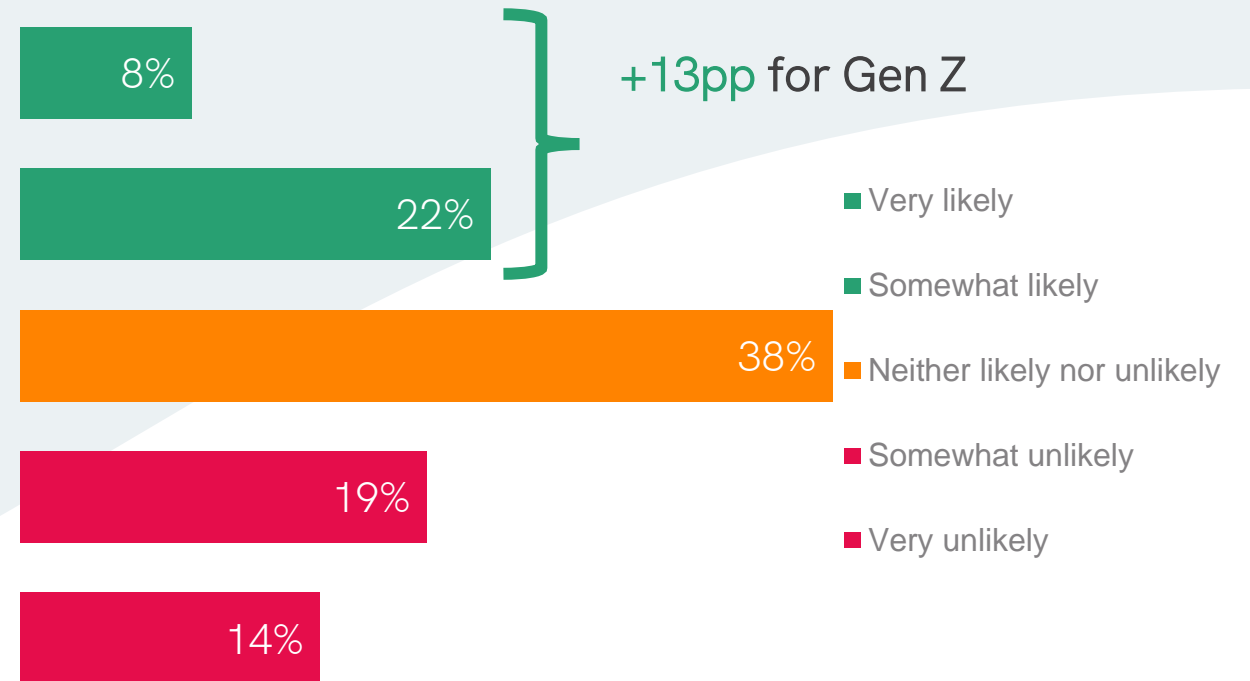
HAVE YOU VISITED A MULTI-PURPOSE VENUE BEFORE? HOW LIKELY ARE YOU TO VISIT A MULTI-PURPOSE VENUE IN THE NEXT FEW MONTHS?

A multi-purpose venue is an outlet that offers a variety of amenities or occasions, as well as ticketless events, often held in open air. For example a restaurant, bar, and games arcade all in one building, under the same ownership. Alternatively, it could be a venue that can serve as a destination for breakfast and casual dining, to a lively evening gathering with high-tempo drinks and dancing well into the night, or a small venue that offers brunch, evening meals and late night drinks.

% of those who have visited a multi-purpose venue before



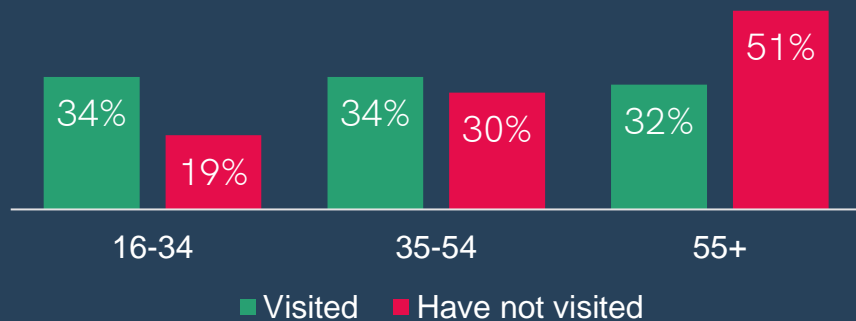
Likelihood to visit a multi-purpose venue in the next few months



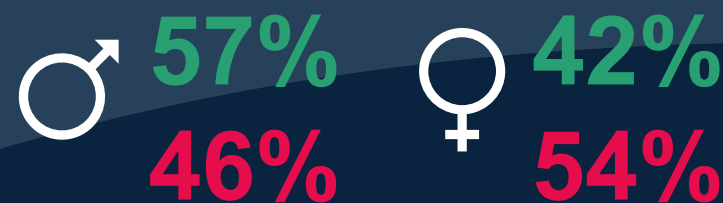
Those who have visited multi – purpose venues before are typically younger, more likely to be located within the city / town centre and typically visit the on premise at least weekly.

Visited | Have not visited

Age groups



Gender



Location of residence



61% **51%**
City centre / town centre

39% **49%**
Rural / suburban

Average household income

€49,304
€46,176

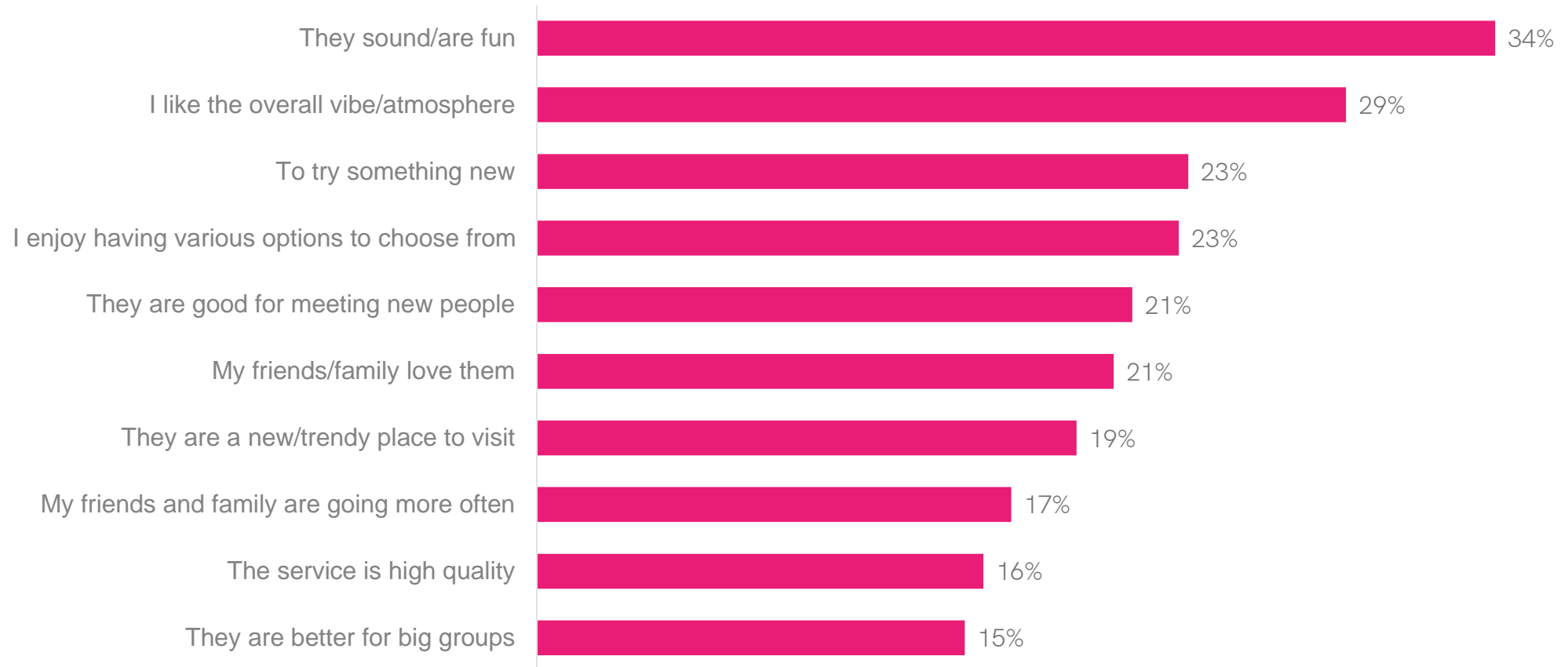
Typically visits the On-Premise...

At least weekly **57%** **32%**



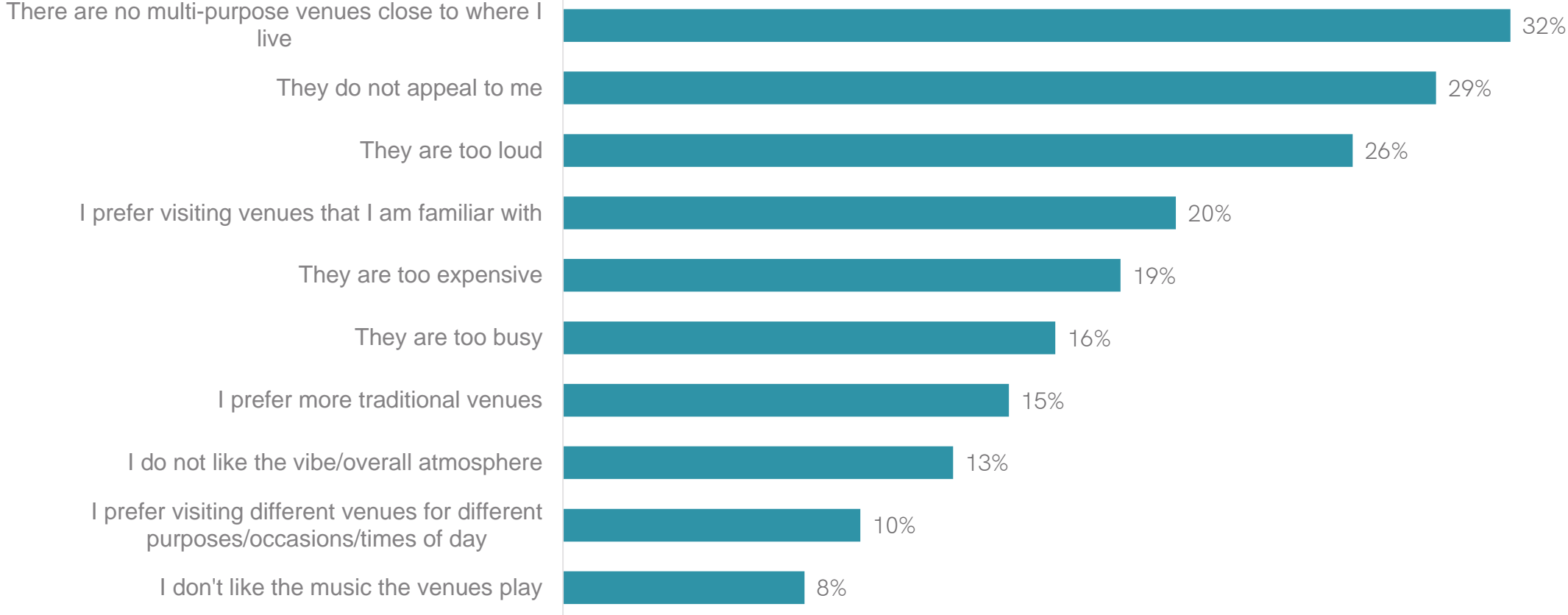
YOU SAID THAT YOU WOULD LIKELY VISIT A MULTI-PURPOSE VENUE IN THE NEXT FEW MONTHS, WHY IS THIS?

Reasons to visit a multi-purpose venue in the next few months | Top 10



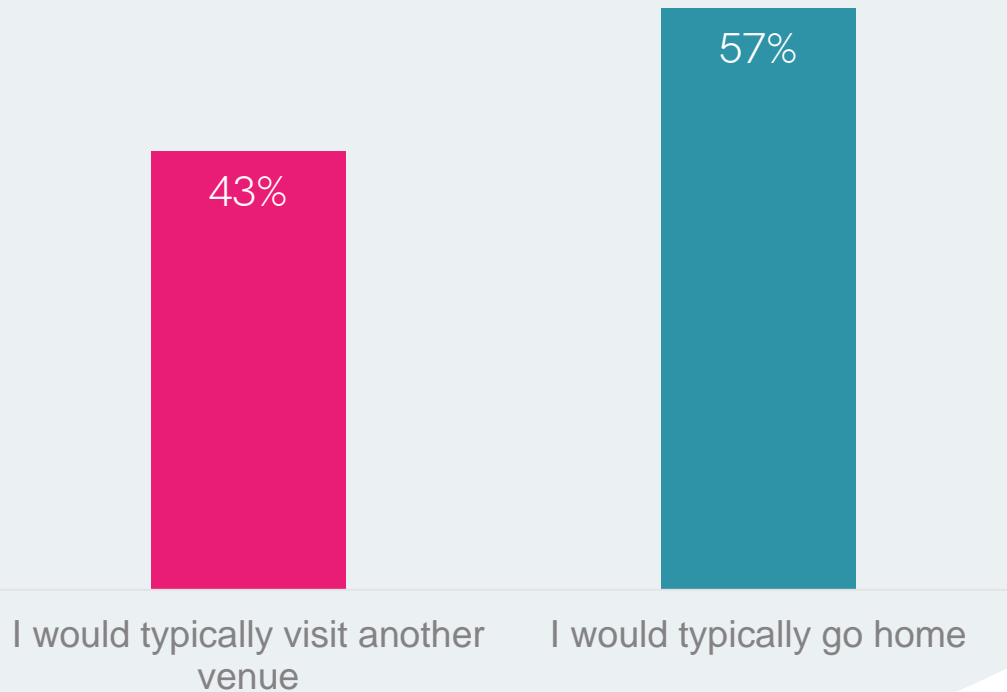
YOU SAID THAT YOU WOULD UNLIKELY VISIT A MULTI-PURPOSE VENUE IN THE NEXT FEW MONTHS, WHY IS THIS?

Reasons not to visit a multi-purpose venue in the next few months | Top 10

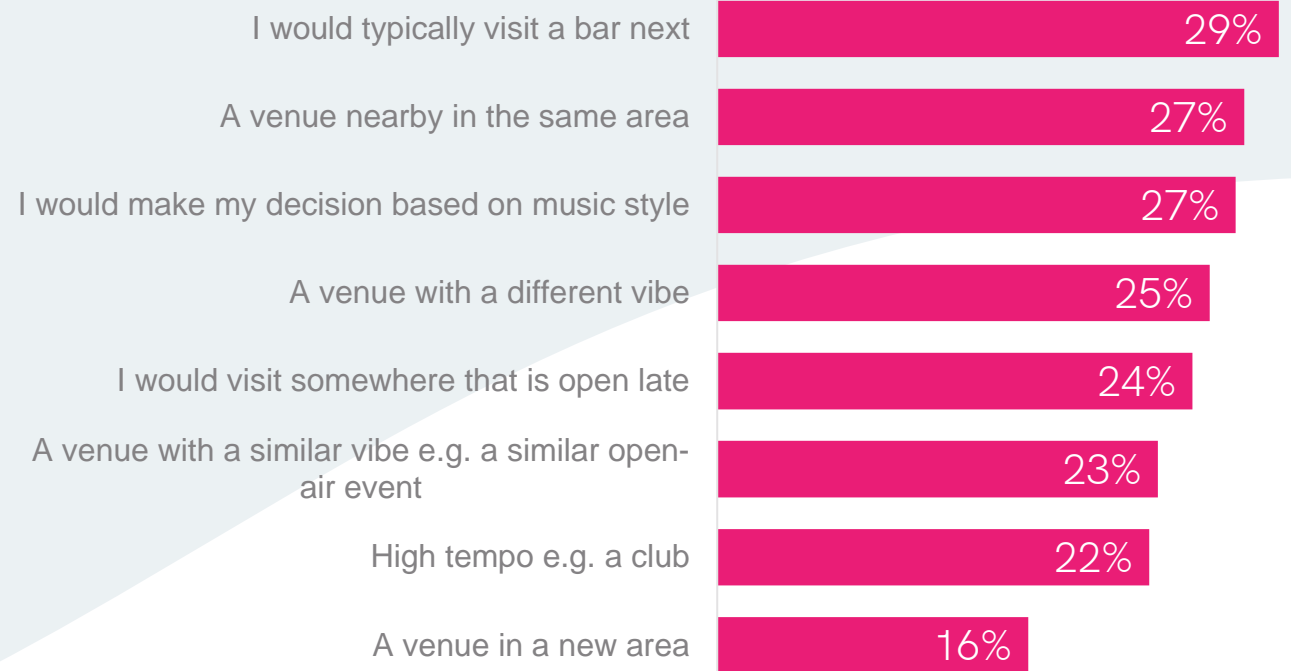


WHEN VISITING THESE VENUES, WHEN THE VENUE CLOSES, WHAT DO YOU TYPICALLY DO AFTERWARDS? WHAT INFLUENCES YOUR DECISION AS TO WHICH VENUE YOU WILL VISIT AFTERWARDS?

% of those who visit another venue after



Influences as to which venue will visit afterwards





Hot topic – Sports

34%

Of consumers plan to watch the UEFA Euro 2024 in a bar, restaurant or similar venue or at the event

50% don't plan to watch the UEFA Euro 2024

16% are not sure yet





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



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