GERMANY ON PREMISE CONSUMER PULSE REPORT

CGA by NIQ, October 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 **October 2023** issue, we surveyed 1000 consumers (aged 18+) between 23rd – 26th October. 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 spirits, high tempo occasions and experience led venues.

SUMMARY: TOPLINE VISITATION & INTENTION

- The intention to visit the hospitality industry in the next month is down slightly compared to this month, which is particularly noticeable among consumers who only go out to drink (-2%). This is in line with the change in visit frequency from weekly to monthly visits.
- GenZ are the consumer group to watch considering their On Premise visitation frequency as well as their On Premise spend.
- Catching up on missed opportunities (+10%) and visiting places that consumers have been looking forward to for a long time (+6%) are the main factors driving consumers to visit more often.
- While the price increase and the cost of living crisis are the main reason for the lower frequency of visits, spending per visit has increased, suggesting that consumers prefer to reduce the frequency of their visits rather than the amount they spend.
- Consumption of wine and hot drinks has increased over the last month, in line with the current season. While beer has seen a decline, which could be due to the recent beer events in Germany.

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KEY METRICS / ON PREMISE VISITATION

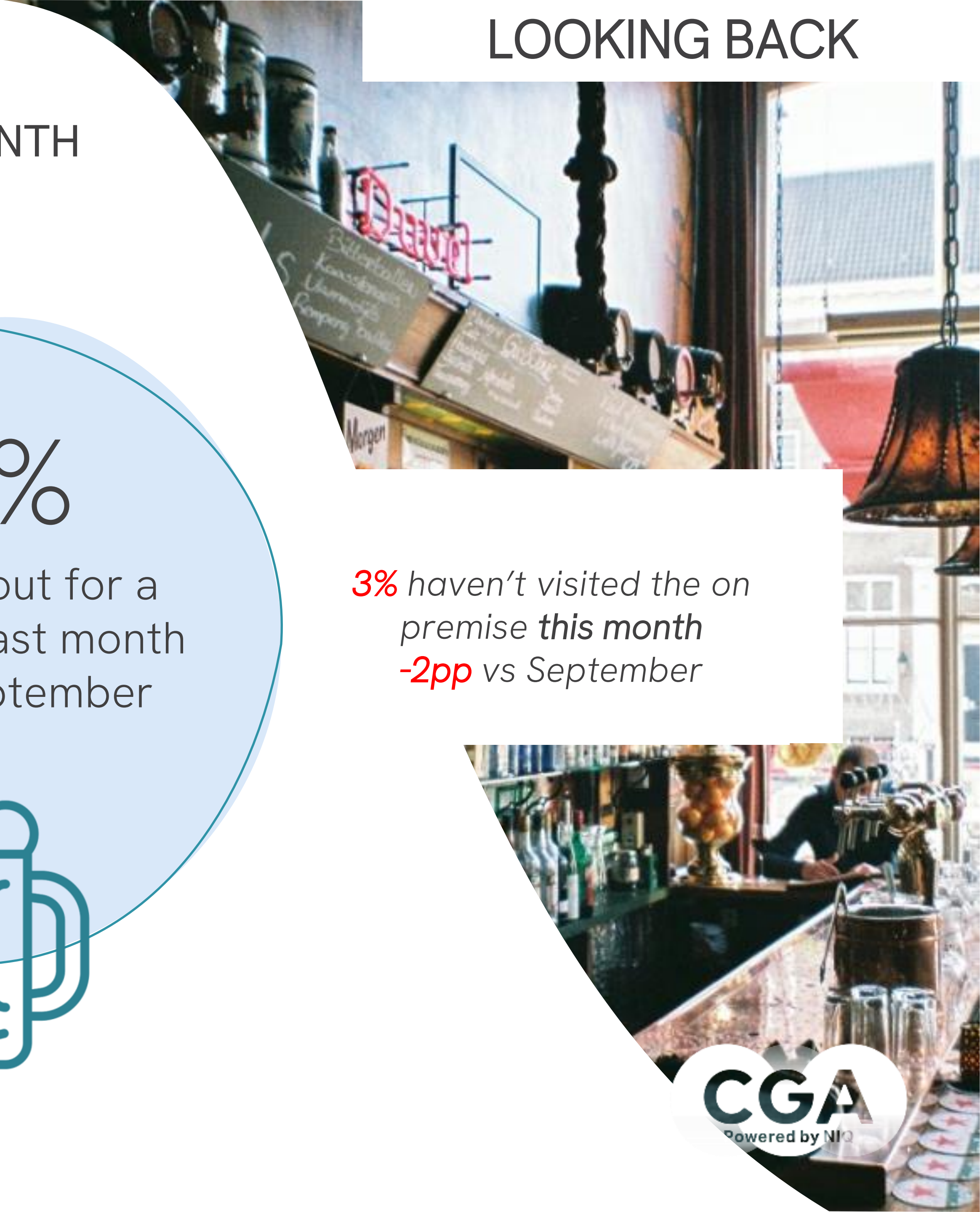
VISITATION IN THE ON PREMISE OVER THE PAST MONTH

92%

Have been out to eat in the last month
+2pp vs September

46%

Have been out for a drink in the last month
-1pp vs September



*3% haven't visited the on premise **this month***
-2pp vs September

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 – SAMPLE: 1000, 1003

VISITATION PLANS FOR THE ON PREMISE MONTH AHEAD

88%

Plan to go out to eat in the next month

=0pp vs September

52%

Plan to go out for a drink in the next month

-2pp vs September

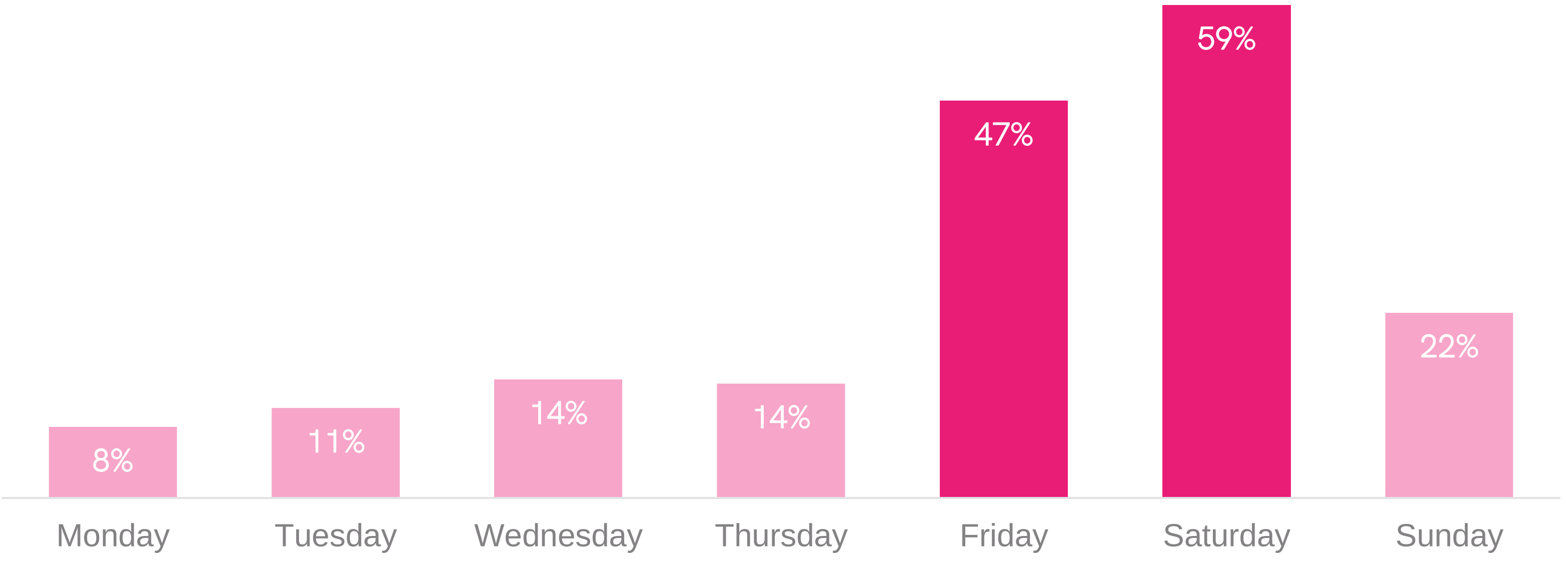
5% don't plan to visit the on premise ***next month***

+1pp vs September

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 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 OCTOBER 2023 – SAMPLE: 968

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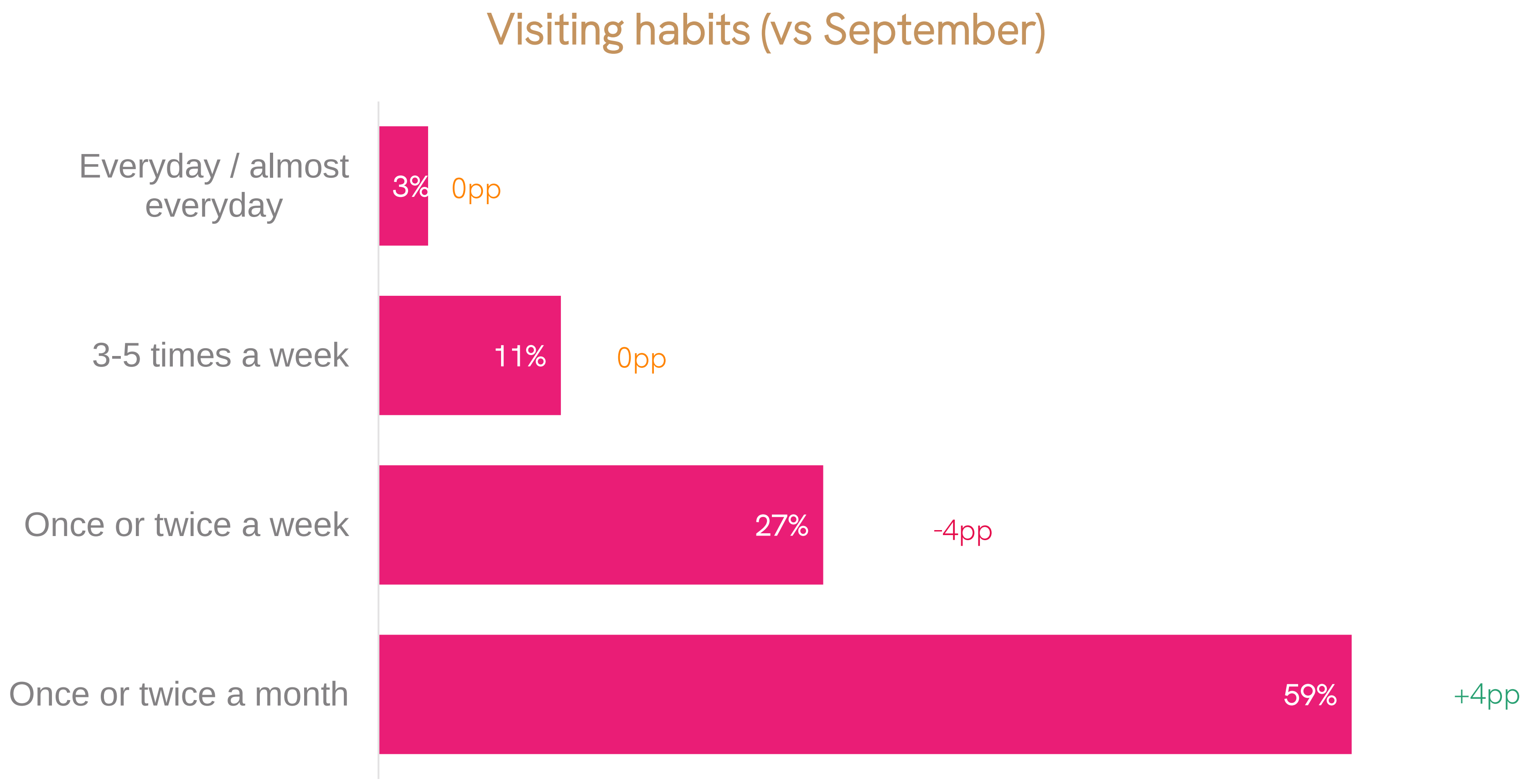
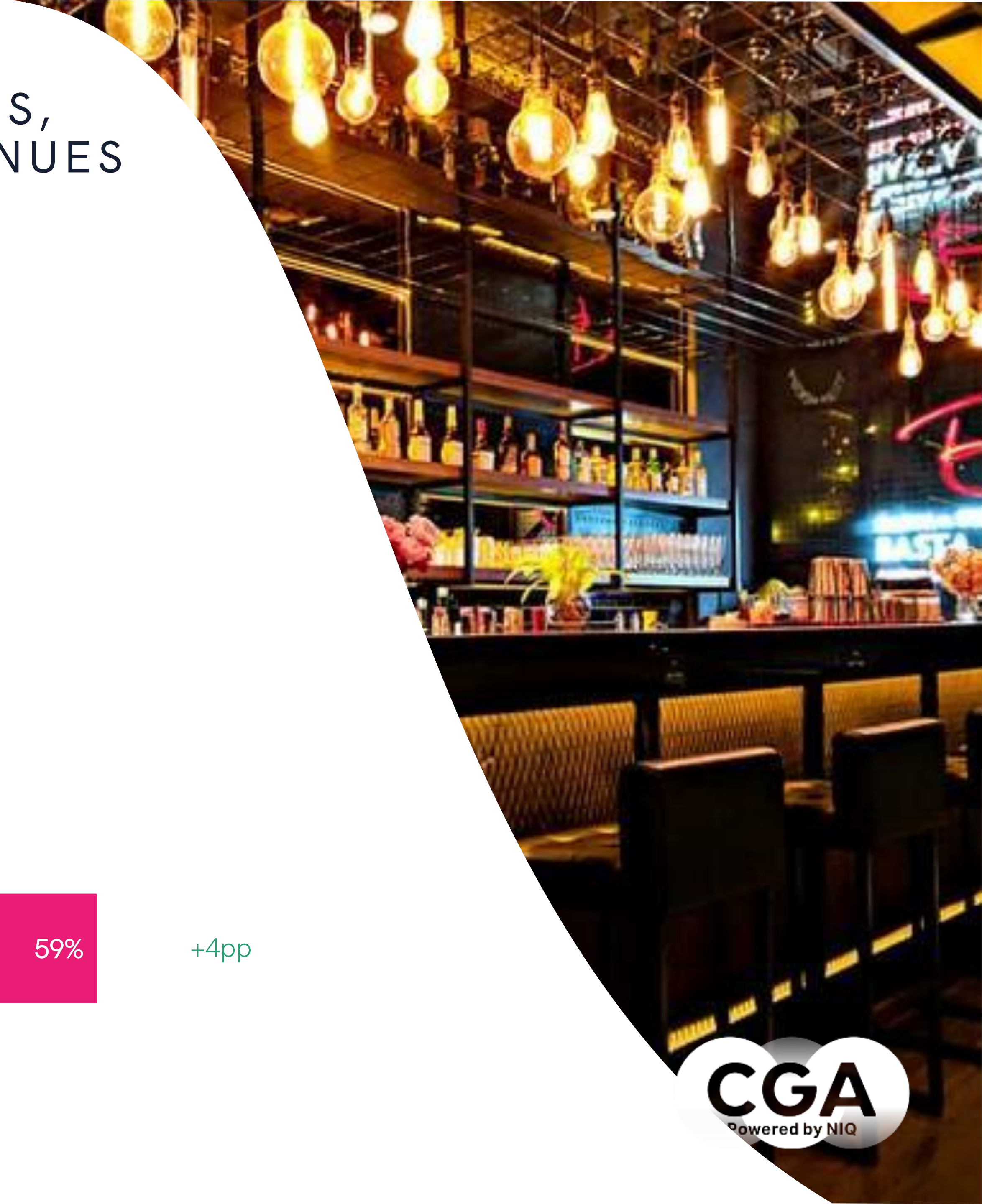
HOW OFTEN HAVE YOU VISITED BARS, RESTAURANTS AND OTHER SIMILAR VENUES OVER THE PAST MONTH?





SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 - SAMPLE: 962, 968

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

Change in frequency of visitation

19%	43%	38%
Going out more often	Going out the same	Going out less often
-1pp vs September	-6pp vs September	+7pp vs September

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 - SAMPLE: 1000, 1003

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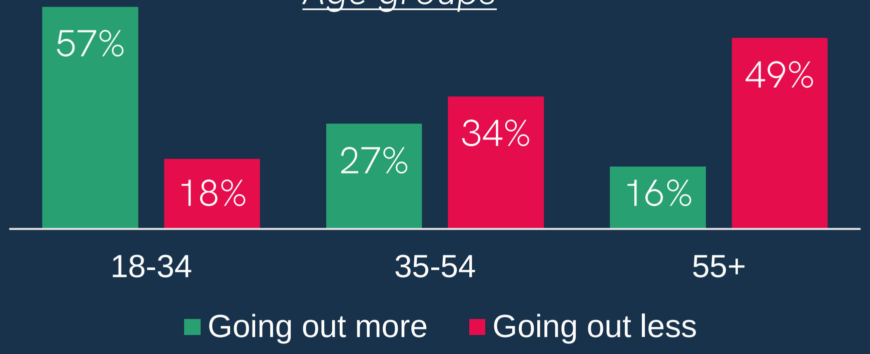
Those visiting the on premise more frequently than usual are typically younger, more likely to be located within the city / town centre and with a higher average household income than those who are visiting less often, as well as typically more engaged with the On Premise

Going out more | Going out less

Age groups



Gender

	Going out more	Going out less
♂	50%	42%
♀	49%	58%

Location of residence

	Going out more	Going out less
City centre / town centre	67%	43%
Rural / suburban	33%	57%

Average household income

Going out more	Going out less
€47,433	€42,150

Typically visits the On-Premise…

	Going out more	Going out less
At least weekly	75%	18%

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 – SAMPLE: 375, 194

47%

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

+28pp vs average consumer

31%

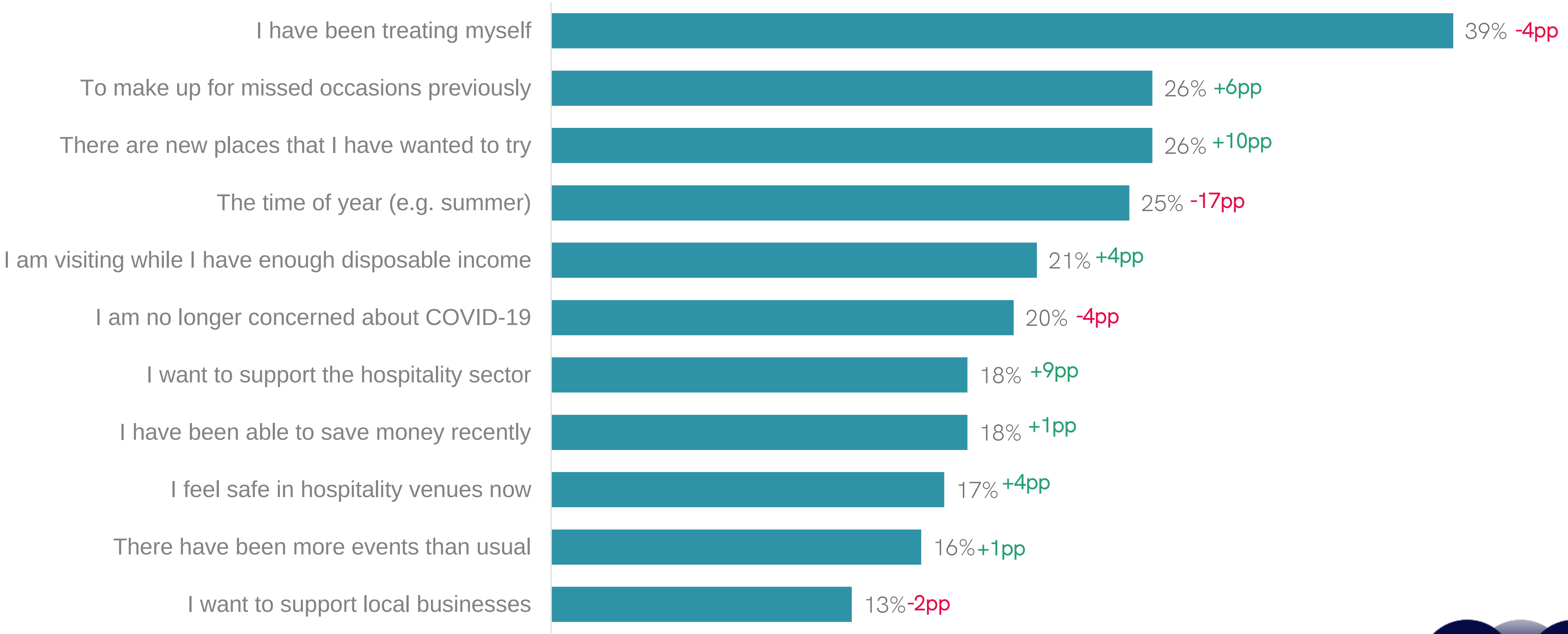
Of Gen Z are spending more overall on eating and drinking out this month

+2pp vs average consumer

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 - SAMPLE: 140

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 Sep)



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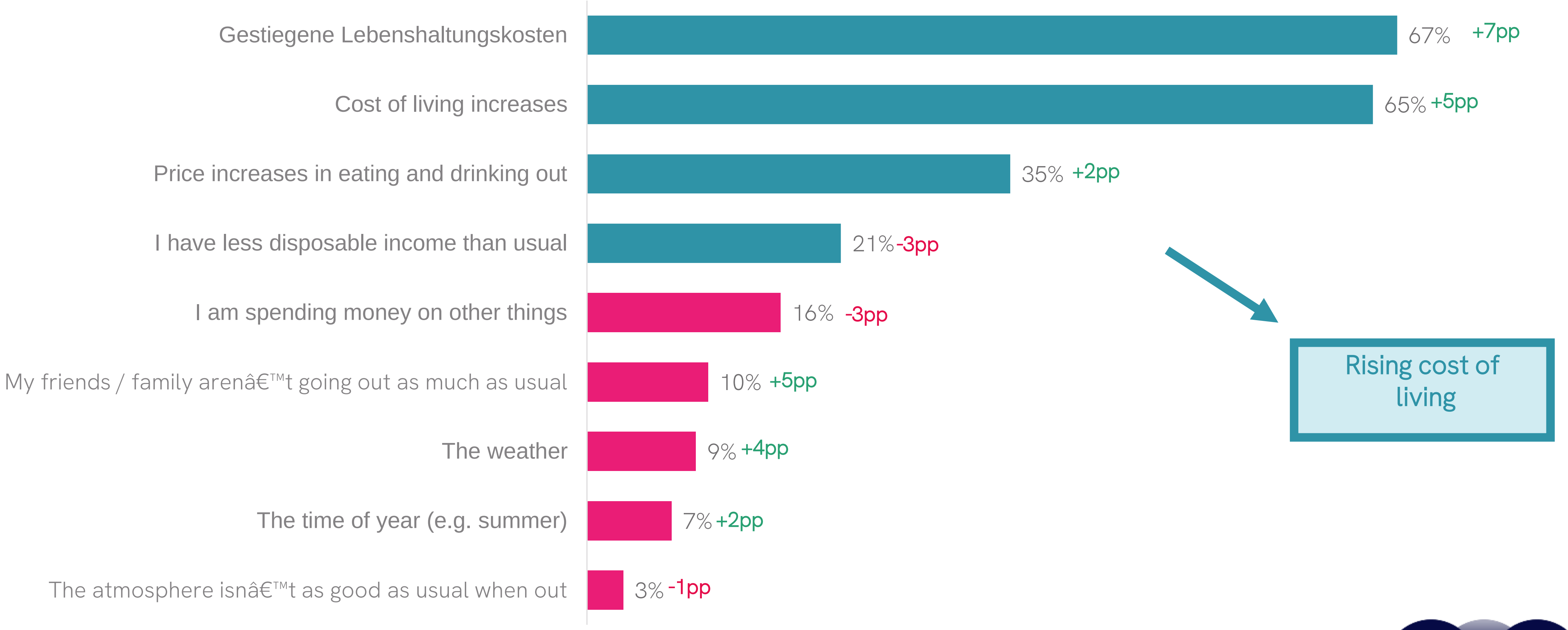
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 - SAMPLE: 194

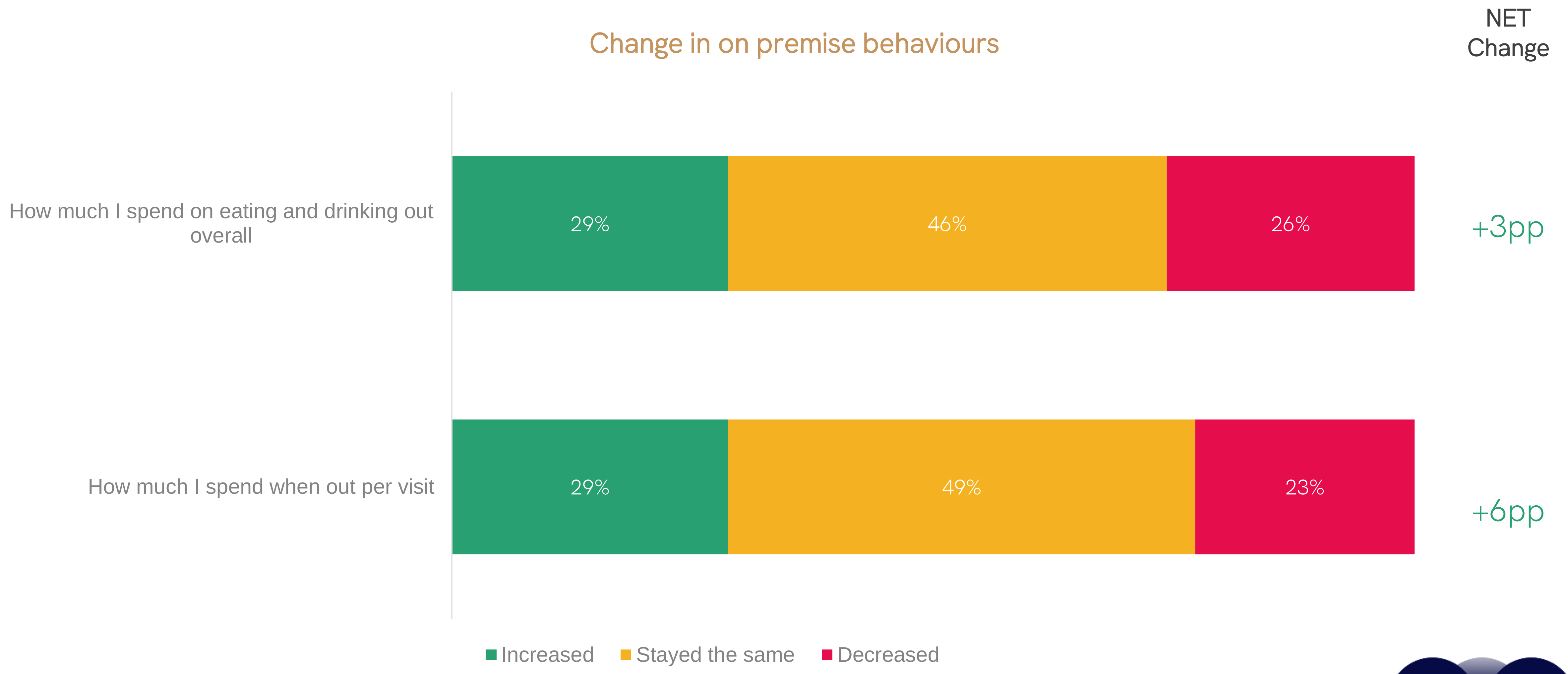
YOU SAID THAT YOU ARE CURRENTLY GOING OUT LESS FREQUENTLY THAN USUAL, WHY IS THIS?

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



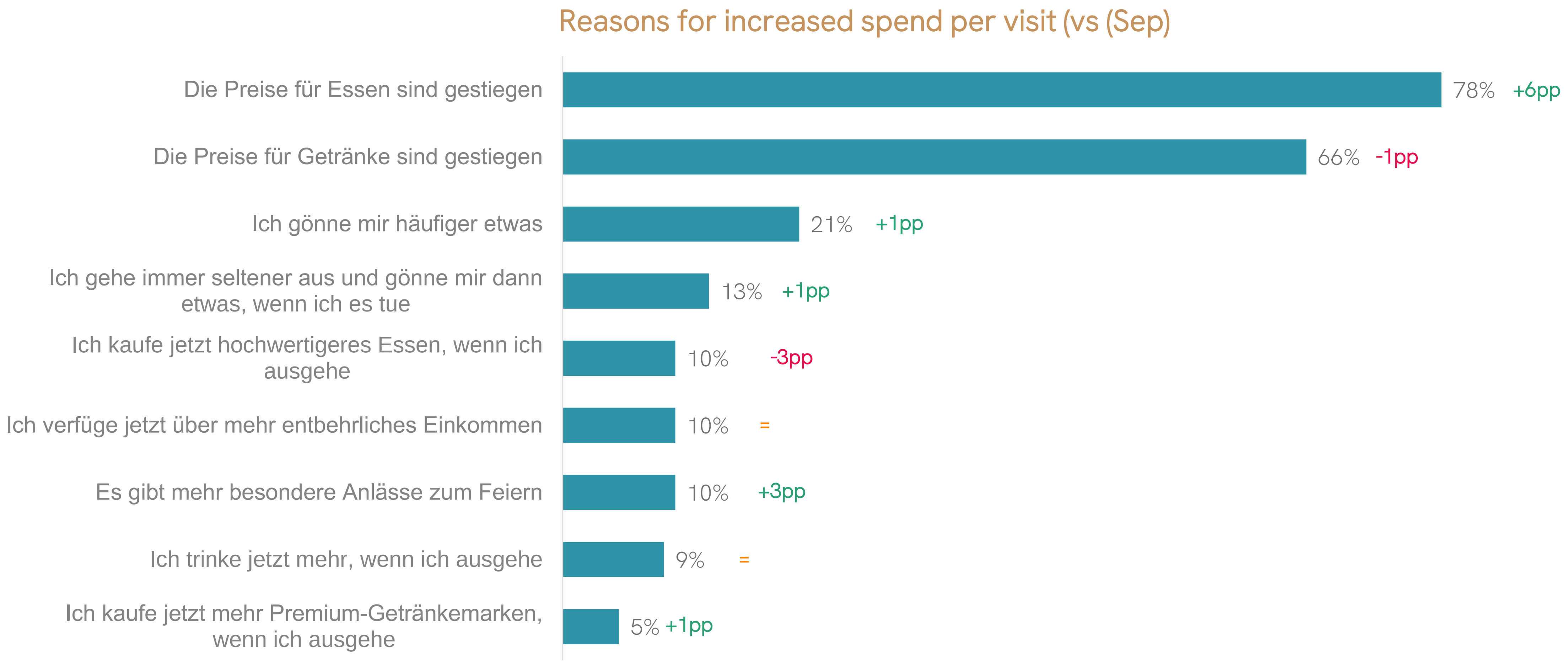
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 - SAMPLE: 375

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



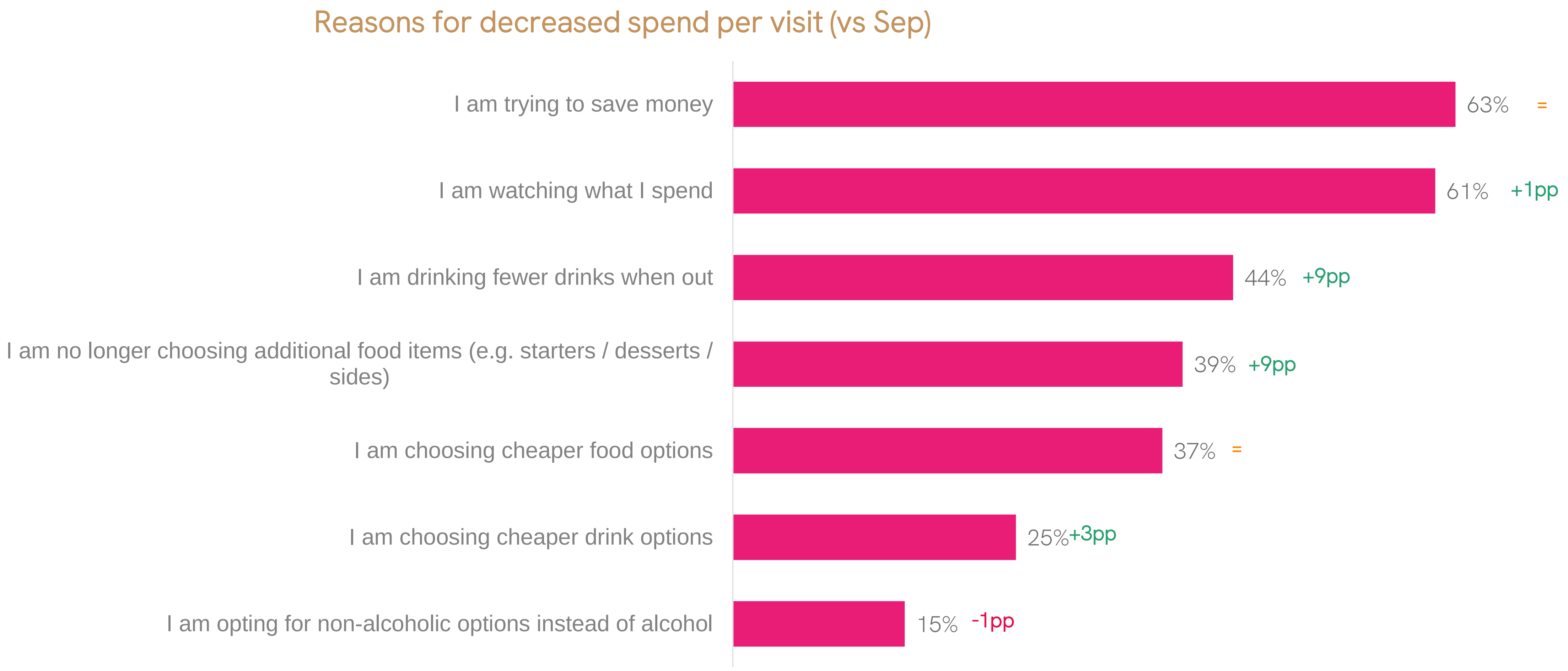
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 – SAMPLE: 1000

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



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 – SAMPLE: 288, 319

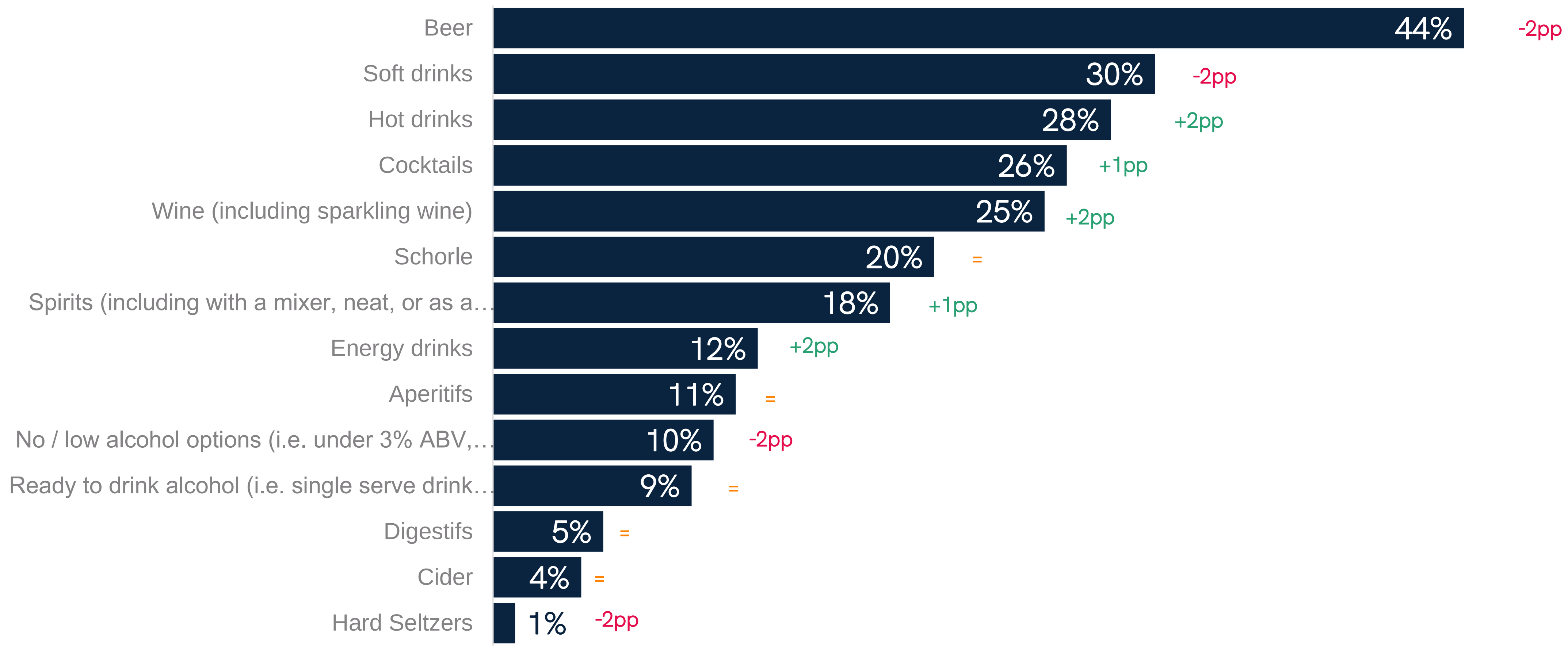
WHICH IF ANY OF THE FOLLOWING ARE REASONS WHY YOU ARE SPENDING LESS NOW WHEN OUT PER VISIT IN BARS, RESTAURANTS AND OTHER SIMILAR VENUES?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 – SAMPLE: 183, 227

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 Sep)



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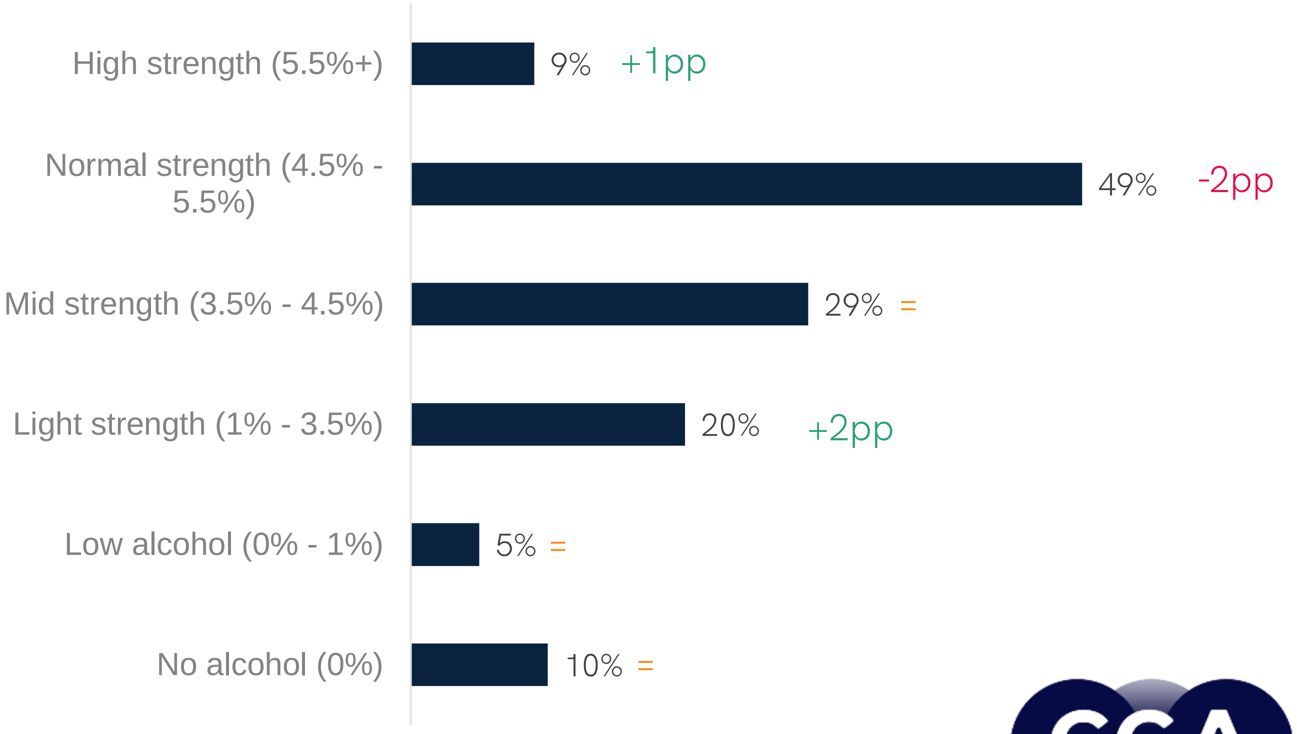
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 – SAMPLE: 962, 968

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

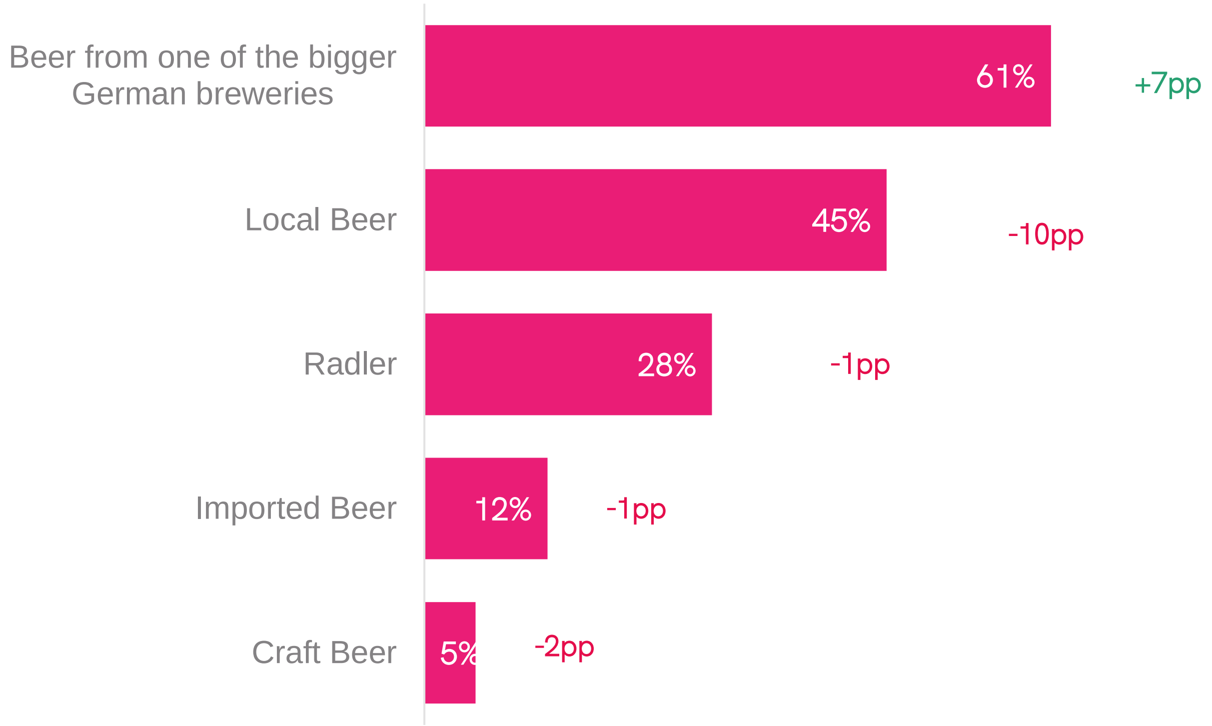
Strengths of beer consumers have drunk in the past month (vs average over past month)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 – SAMPLE: 430, 461

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

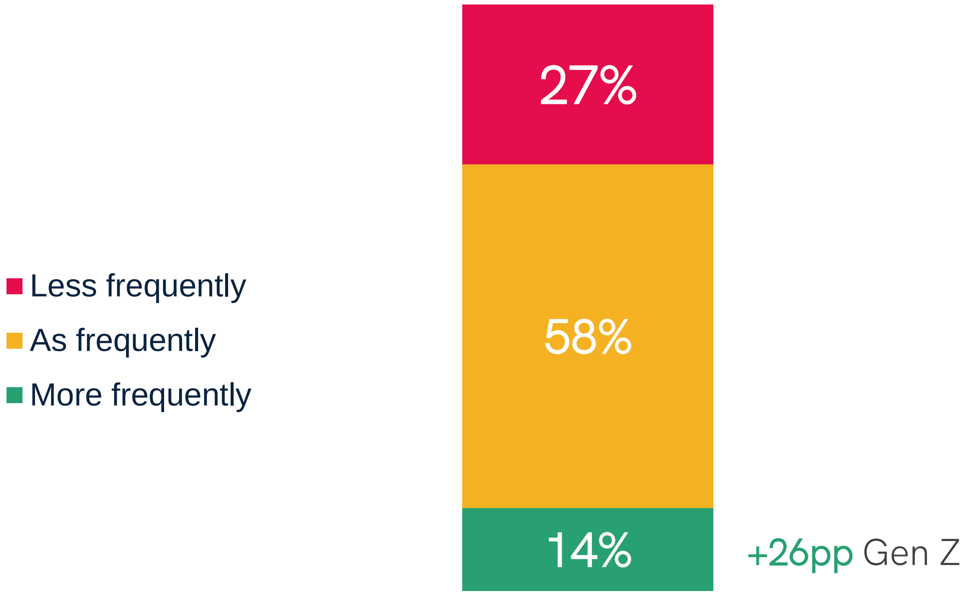
Types of beer consumers have had in the past month (vs Sep)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 – SAMPLE: 441, 229

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



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 – SAMPLE: 999

HOT TOPICS

HOT TOPICS…

- Food pairing attracts 1/3 of the consumer and whilst not essential for the majority could attract a slightly different consumer group and can influence the drink choices of 38% of consumers.

- The planned reduction in Spirit consumption is hitting the rum, tequila and Aperitif market the hardest.

- The treat aspect as well as the variety of cocktails on offer are the biggest driver to cocktail consumption whilst value for money an important factor is for spirit consumption.

- High tempo occasions are offering an accessible way to engage with the future on Premise consumer. Using their desire to have fun could be the first step to consumer loyalty .

Hot topic – Food Pairings

HOW ESSENTIAL DO YOU SEE FOOD PAIRINGS TO BE WHEN CHOOSING WHAT TO DRINK IN VENUES, HOW LIKLEY WOULD YOU BE TO BASE YOUR DRINK SELECTION ON A SUGGESTED FOOD PAIRING?

How essential do you see food pairings to be when choosing what to drink in bars, restaurants, and other similar venues?

I expect to see food parings when out	35%
I do not expect to see food pairings when out but they are nice to have	40%
I do not think food pairings are necessary to see when out	25%

How likely would you be to base your drink selection on a suggested food pairing?

38%

Of consumers are likely to base their drink choice on a suggested food pairing

36% neither likely nor unlikely
26% unlikely

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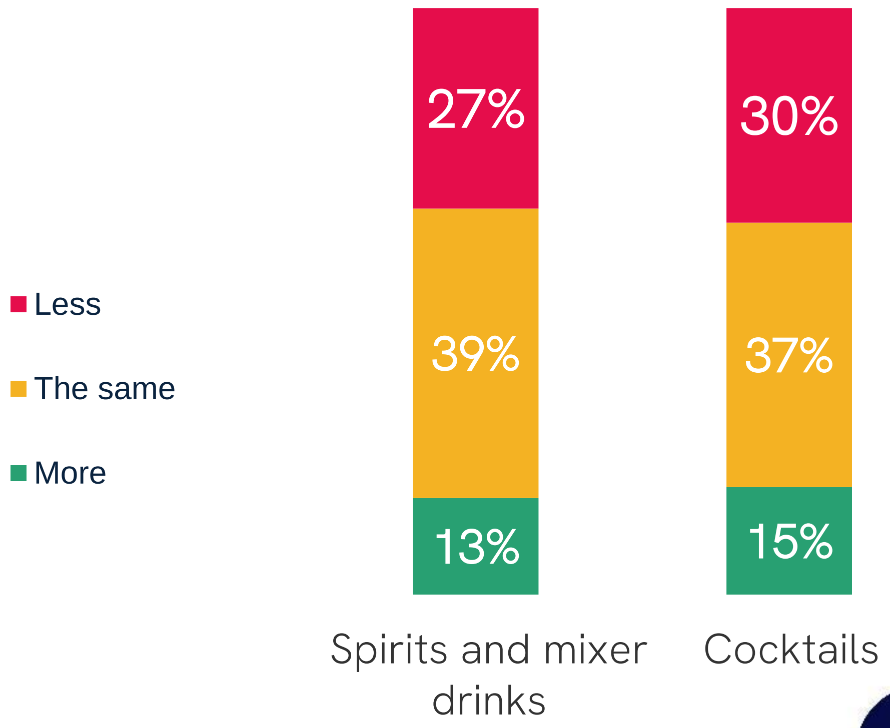
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 – SAMPLE: 1000

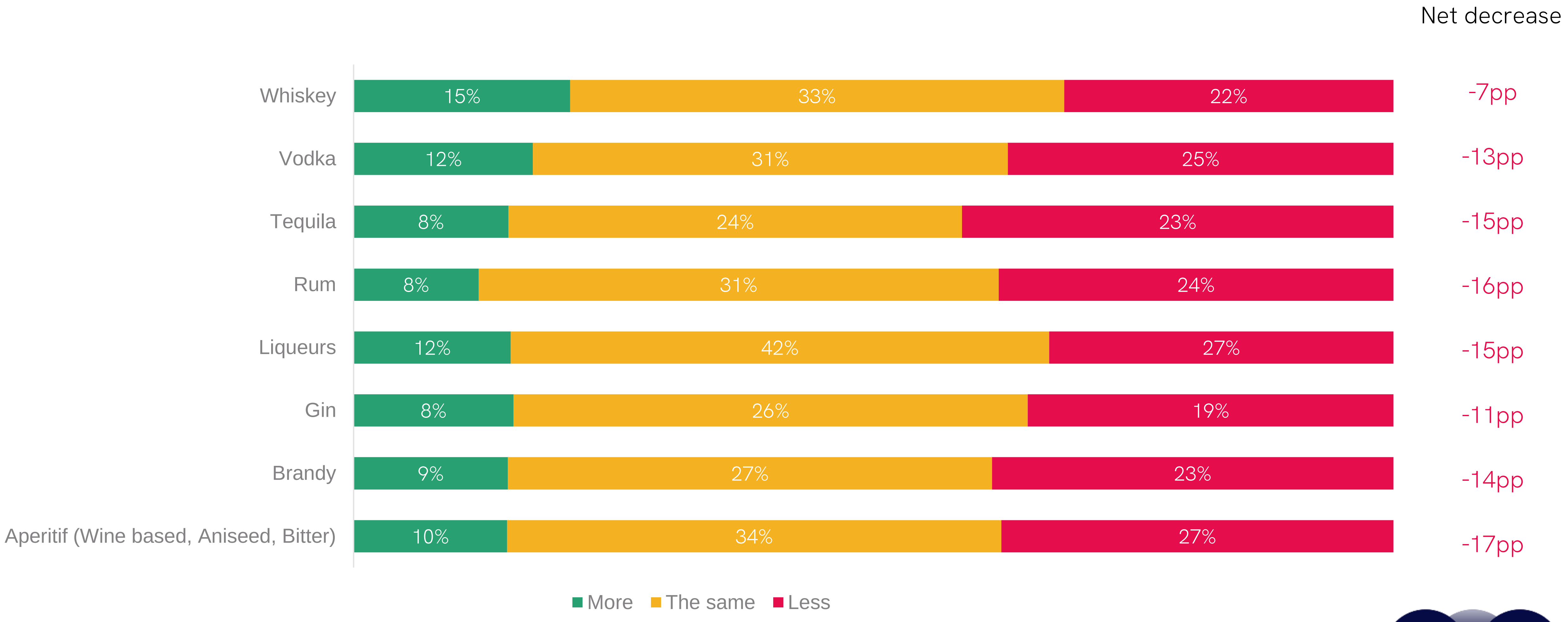
Hot Topics – Spirits and Cocktails

When visiting bars, restaurants or similar venues, are you drinking the following categories more, the same or less than 6 months ago?

Frequency drinking compared to 6 months ago:



When visiting bars, restaurants or similar venues, are you drinking the following categories more, the same or less than 6 months ago?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 – SAMPLE: 172

Which of the following statements best describes how you are behaving in bars, restaurants or similar venues?

What visitors are choosing

33 %

Are choosing Cocktails over spirit and mixers

28 %

Are choosing Spirits and Mixers over cocktails

39 %

Are choosing none of these

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Which of the following are reasons why you are choosing cocktails over spirit and mixer drinks when at bars, restaurants or similar venues? Please select all that apply

Reasons for choosing Cocktails

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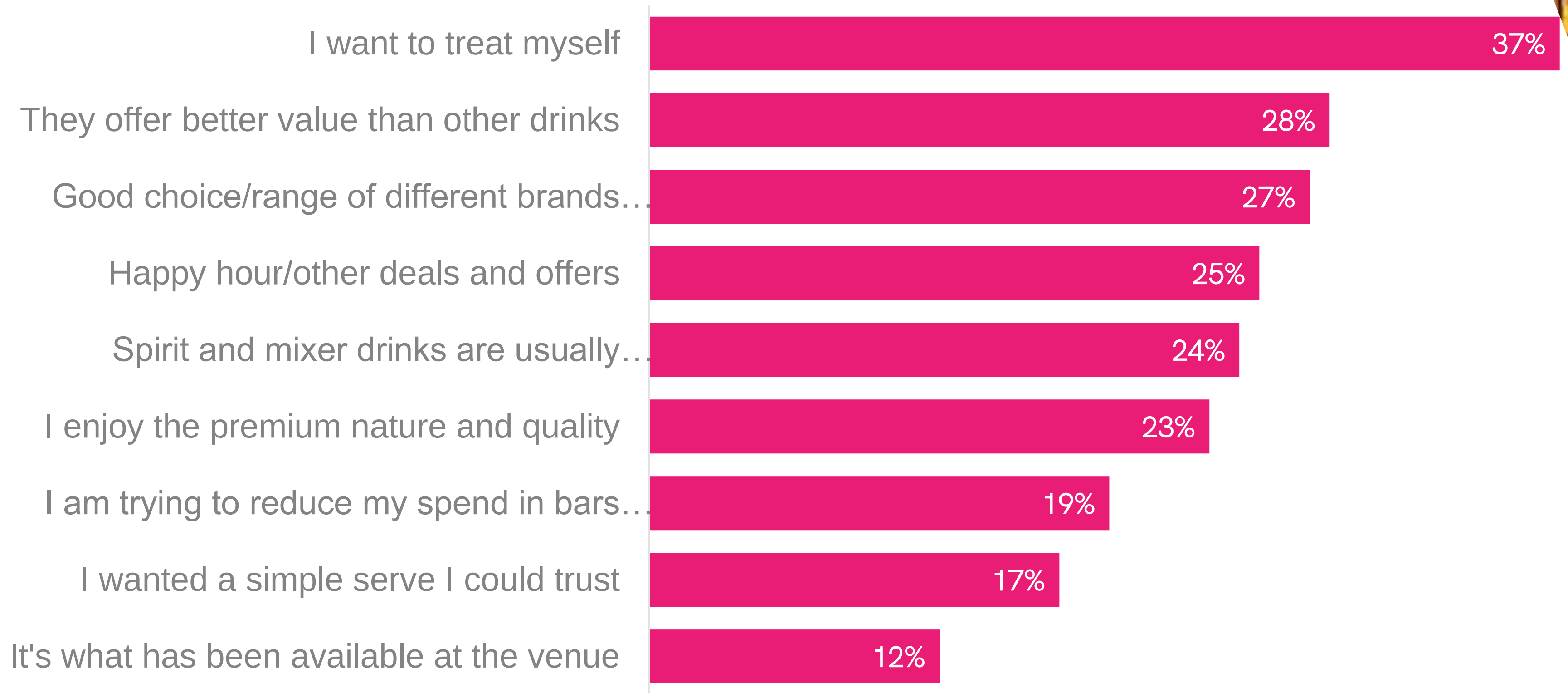
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 – SAMPLE: 289

Which of the following are reasons why you are choosing spirit and mixer drinks over cocktails when at bars, restaurants or similar venues? Please select all that apply.

Reasons for choosing Spirits and mixers



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Hot Topics – High Tempo Occasions and Experience led venues

Thinking about the past 3 months, how often have you been out for high-tempo occasions?

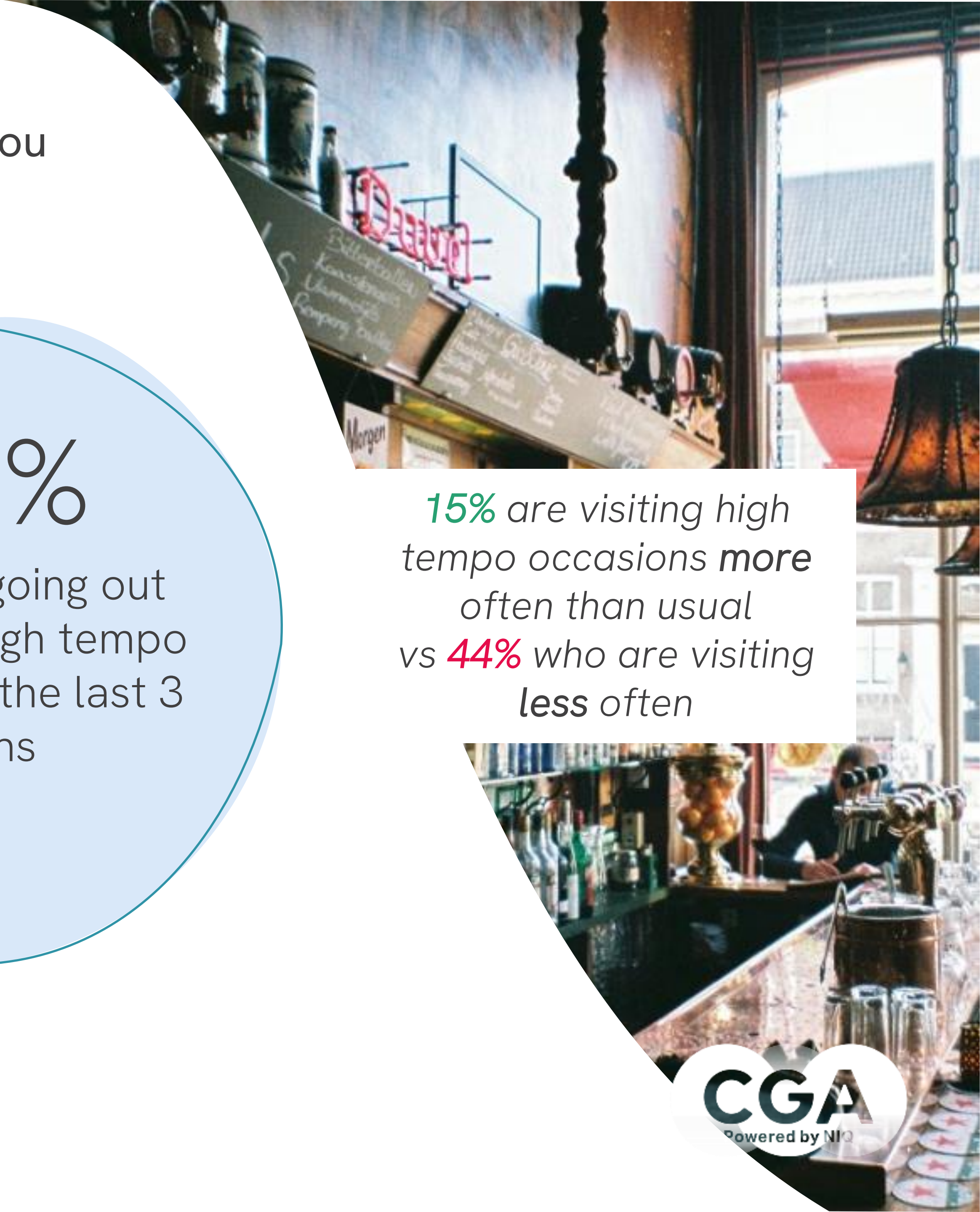
15 %

Have been going out weekly to high tempo occasions in the last 3 months

+19pp for Gen Z

37 %

Have been going out monthly to high tempo occasions in the last 3 months



*15% are visiting high tempo occasions **more** often than usual vs 44% who are visiting **less** often*

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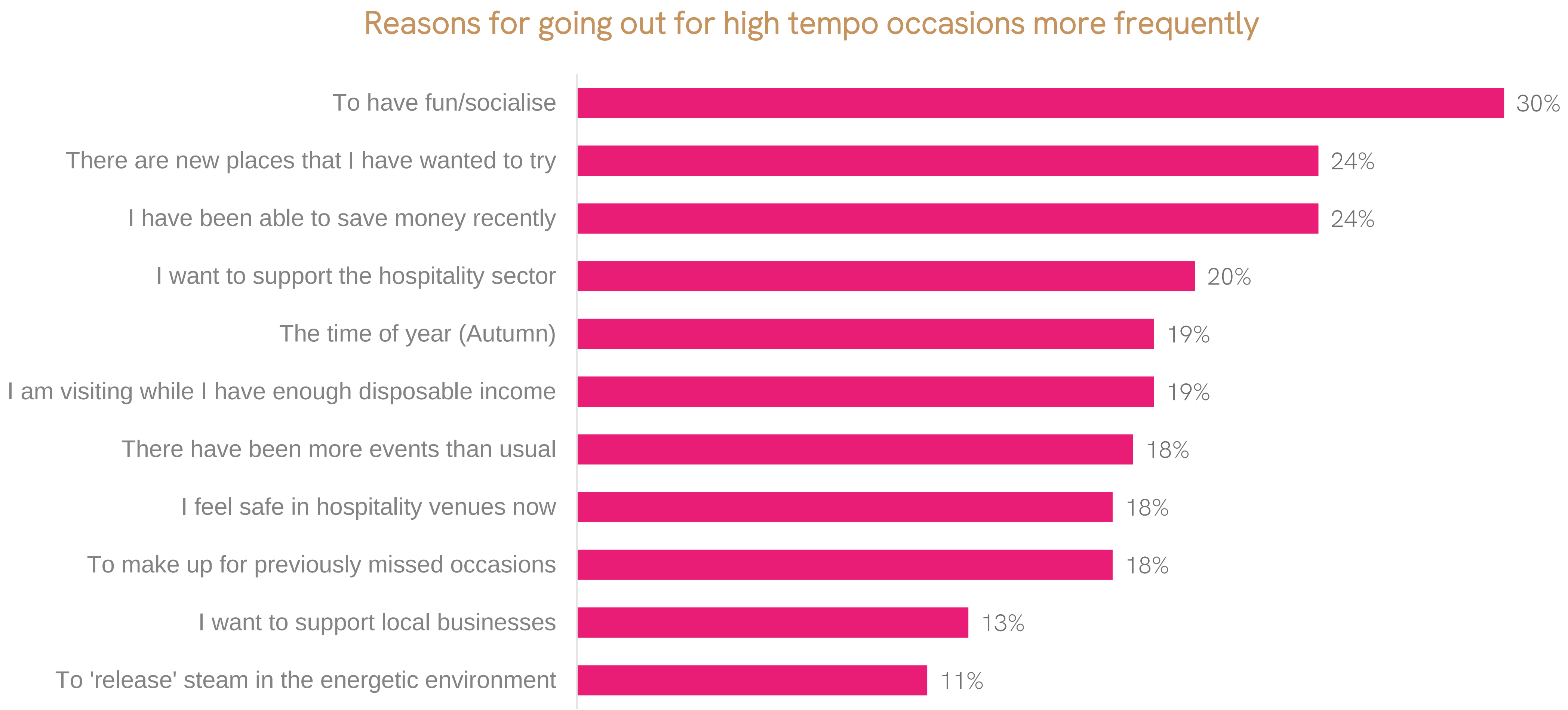
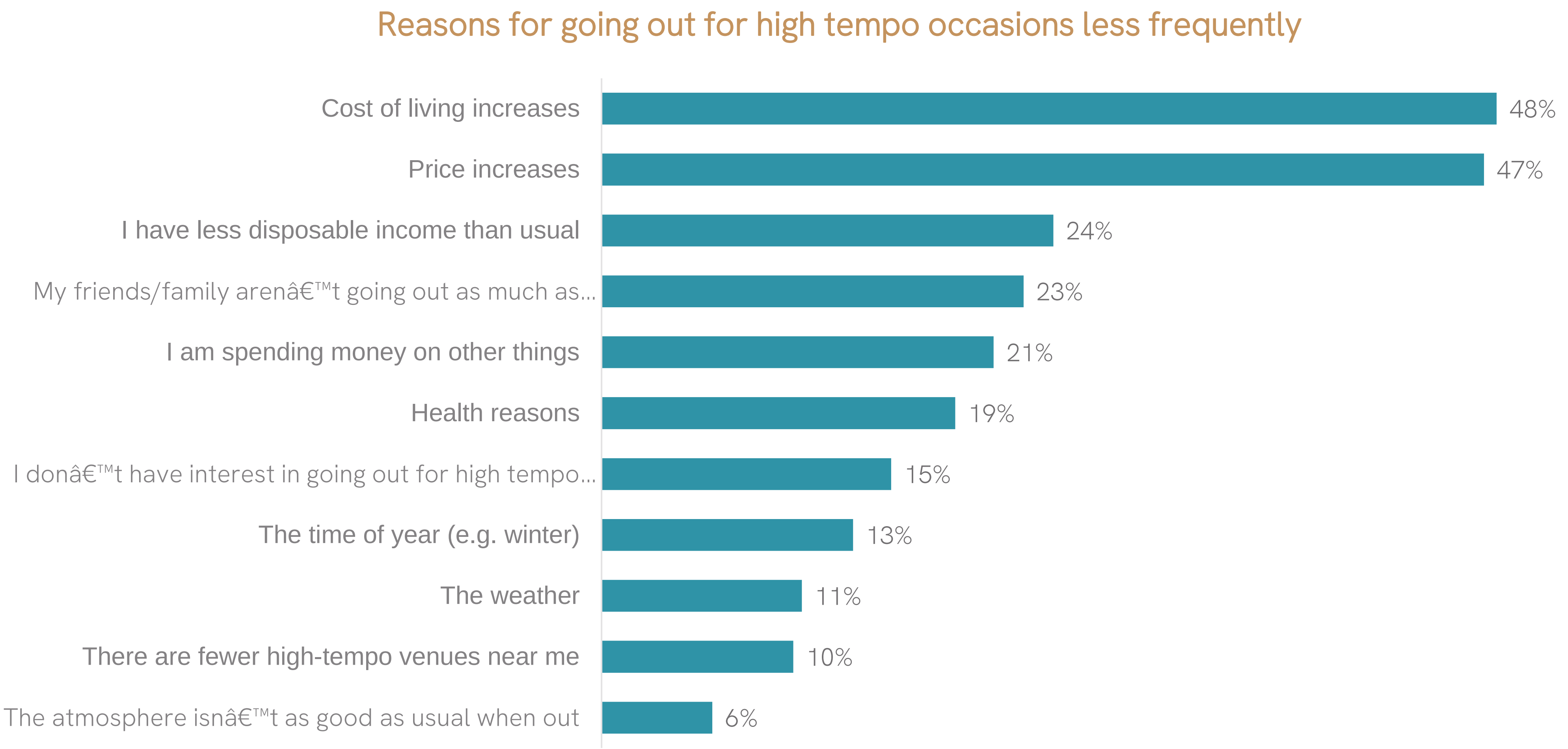
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 – SAMPLE: 1000

You have said that you have been going out for high-tempo occasions more frequently than usual. Why is this? Please select all that apply.



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 – SAMPLE: 148

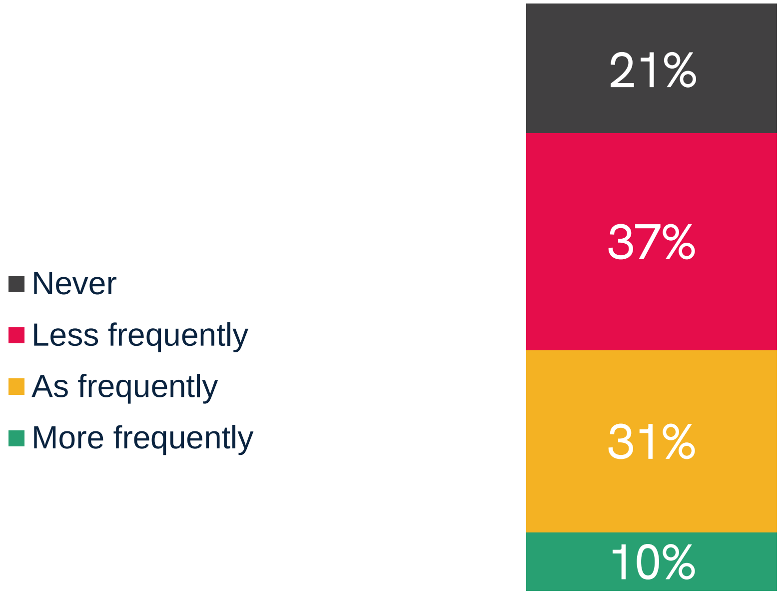
You have said that you have been going out for high-tempo occasions less frequently than usual. Why is this? Please select all that apply.



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 – SAMPLE: 440

HAVE YOU BEEN VISITING LEISURE VENUES MORE OR LESS FREQUENTLY OVER THE PAST 3 MONTHS?

Frequency of visiting leisure venues over the past 3 months



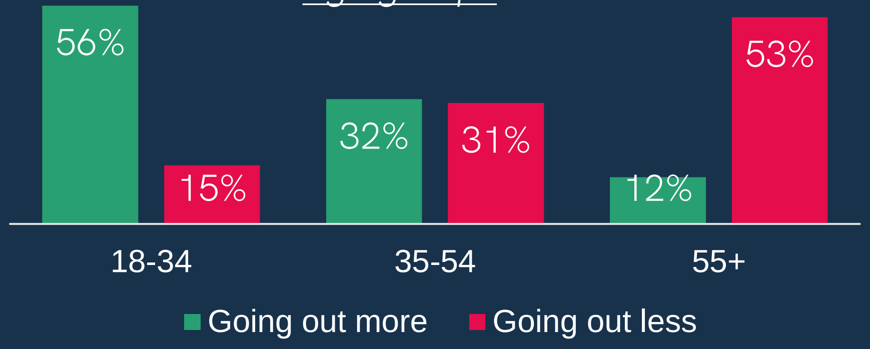
+15pp for Gen Z

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 – SAMPLE: 1000

Those going out for high tempo occasions 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, as well as typically more engaged with the On Premise

Going out for high tempo occasions more | Going out for high tempo occasions less

Age groups



Gender

♂ 54% 47%

♀ 45% 53%

Location of residence

71% 45%

City centre / town centre

29% 55%

Rural / suburban

Average household income

€45,169

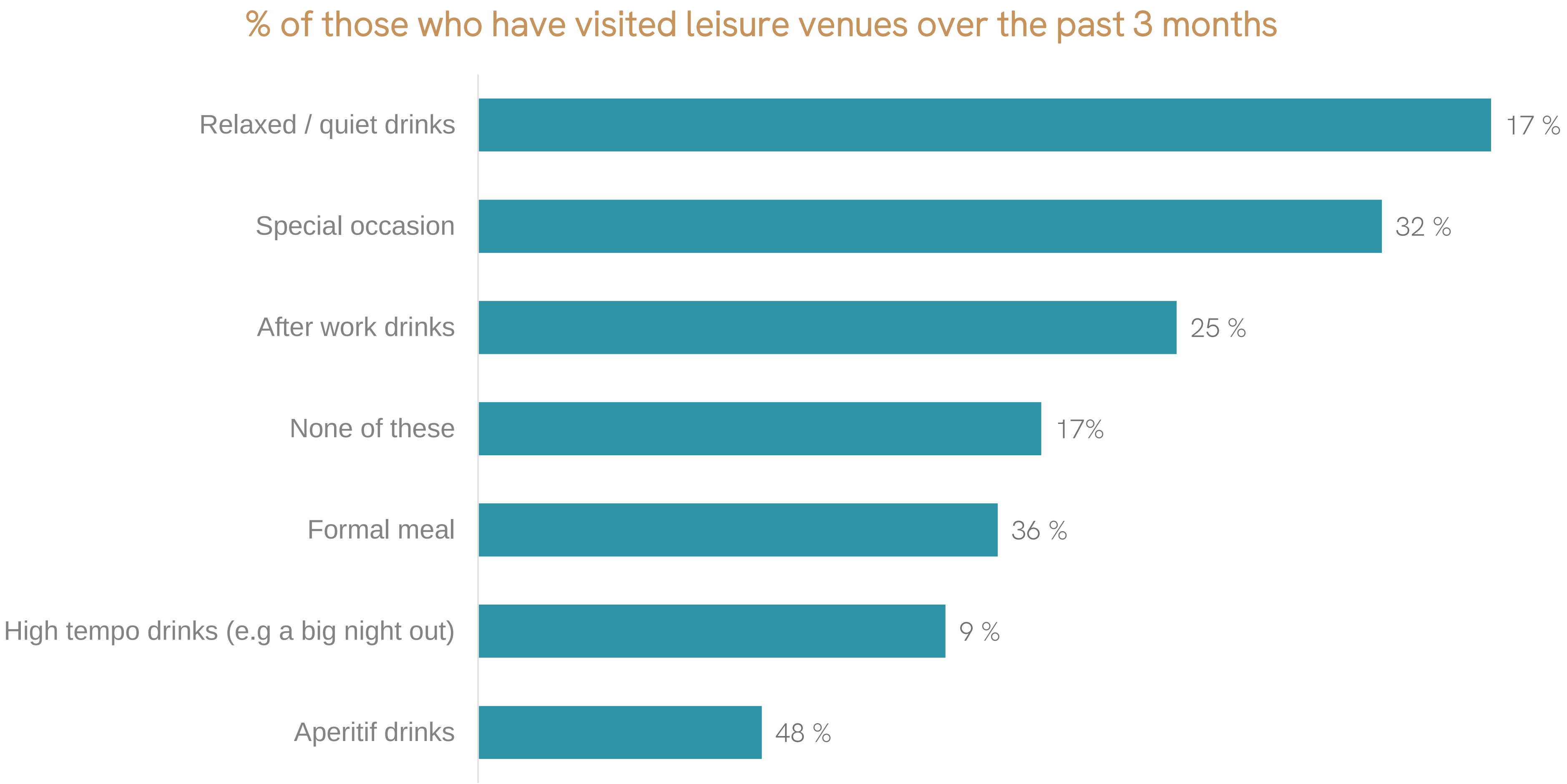
€38,682

Typically visits the On-Premise…

At least weekly 78 25%

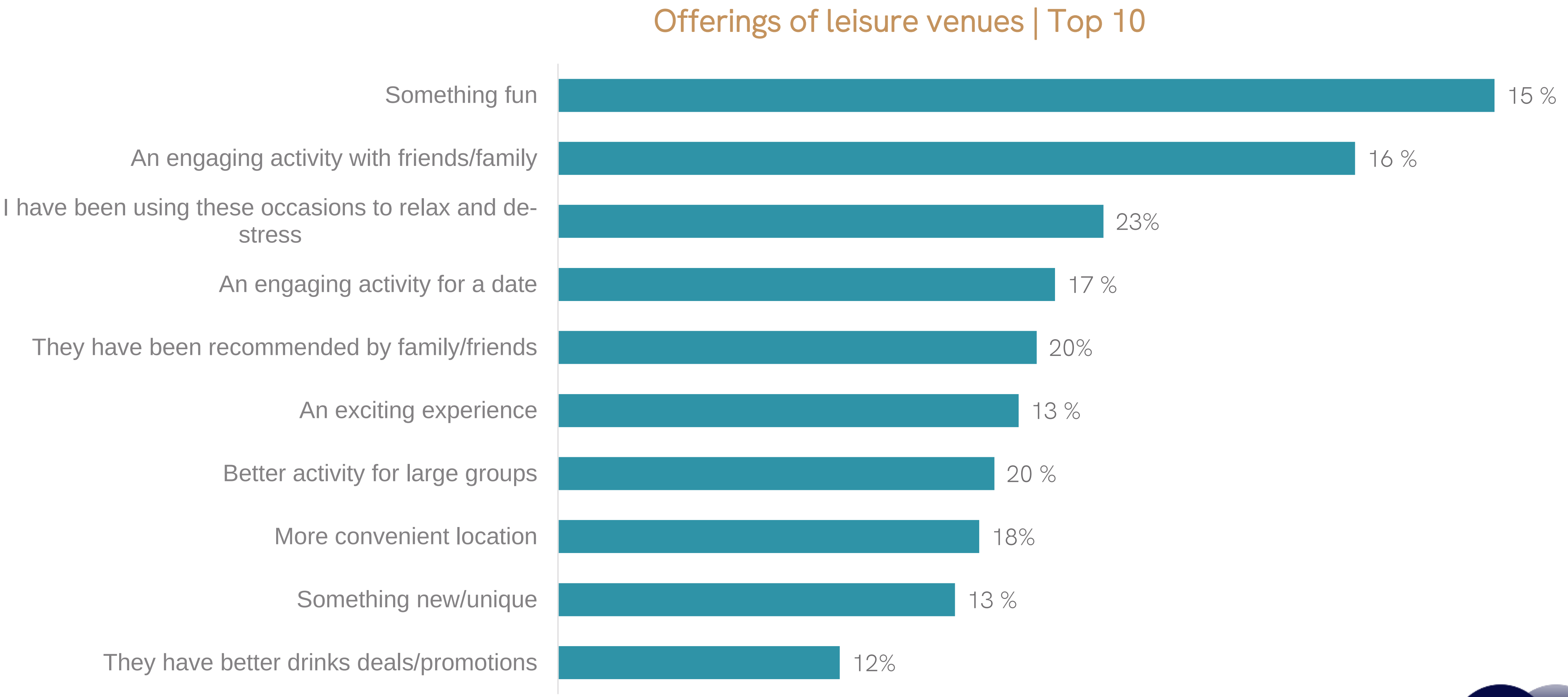
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 – SAMPLE: 440, 148

HAVE YOU BEEN VISITING LEISURE VENUES FOR ANY OF THE FOLLOWING OCCASIONS MORE FREQUENTLY OVER THE PAST 3 MONTHS?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 – SAMPLE: 779

WHAT DO LEISURE VENUES OFFER OVER OTHER VENUES LIKE PUBS OR BARS WHEN OUT?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT OCTOBER 2023 – SAMPLE: 777

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.

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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 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.

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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