# GERMANY ON PREMISE CONSUMER PULSE REPORT

CGA by NIQ, February 2024

# Unlock custom consumer insight by adding your own questions to CGA's On Premise User Survey (OPUS)

OPUS

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## The opportunity

Ask **any question** your On Premise business is seeking answers on to a healthy sample of On Premise visitors via CGA's On Premise User Survey for quick, and actionable results.

In addition to asking **any question** of your liking, you can also target your question to any consumer group of your choice (specific age group, brand drinker, category drinker, channel visitor, region, etc.)

## What you will receive

+ The results of **your custom questions** split by the average On Premise visitor, as well as by age and gender splits
+ Summary page condensing **key insights/findings** from the results
+ **Only you will receive the results** to your questions

## What is OPUS?

Our On Premise User Survey is conducted twice a year, with the aim of understanding the 'Why' as well as the 'What' regarding consumer behaviour in the On Premise.

+ 7,000 respondents from On Premise visitors
+ Nationally representative based on age, gender and region
+ Consumers ejected if they aren't LDA or have not visited the On Premise in the last 3 months

*Question slots allocated on a first come, first serve basis. For more information, get in touch.*

## Costs

Not necessary to purchase full survey to add custom questions

**Text Questions**
€1,500 per question
€6,500 for 5 questions

## Key Dates

**April 5th, 2024**
Deadline for custom questions submission

**April 20th 2024**
Survey live in field

**May 20th 2024**
Delivery and analysis of custom questions

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# SUMMARY: TOPLINE VISITATION & INTENTION

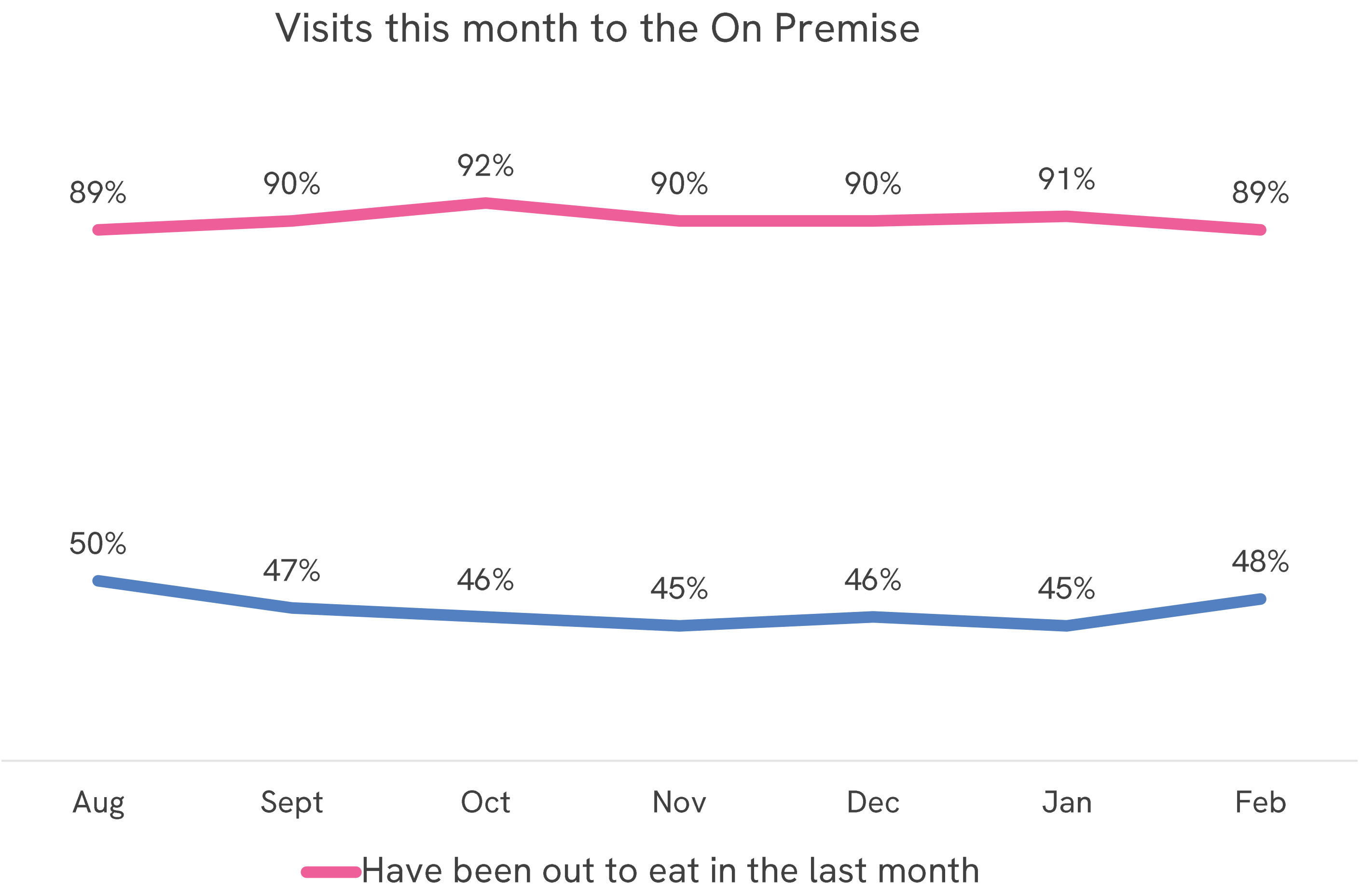
- There has been an increase in total visitation rates during this month, with a recovery for drink-led visits rate to match last summer rates.
- Building on that, consumers are tending to go out more for drinking occasions this month compared to January; while the opposite for food-led occasions
- The increasing cost of living has the biggest impact on consumers regarding less visitations to the On-Premise, adding to the fact that consumers now tend to pay more per visit to the On-Premise
- Beer is still the top consumed category for consumers during February, however, consumers have shifted their interest slightly towards Light and Low Alcohol Beers
- For this month's Beer deep dive, we learned that the category of the Beer plays a strong influence on consumers decision to order Beer when in the On-Premise. Nearly half of consumers admitted that they would be very interested in learning more about beer, with brewery tours and festivals being a key opportunity for this!
- For Beer types, Pilsner and Wheat Beers are the most favourable among Beer drinkers, with the majority choosing their Beer as Draught
- A quarter of consumers have planned to go skiing this year, with majority planning to have it in their home country. These events present great opportunities for the hot drinks category and Beer, with visitation and experimentation high during these breaks

# 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 January 2024 to February 2024 in Germany.
- This study explores 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 February 2023 issue, we surveyed 1002 consumers (aged 18+) between 22nd – 29th February 2024. 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 including a Beer deep dive and skiing holidays.

# KEY METRICS / ON PREMISE VISITATION

# VISITATION IN THE ON PREMISE OVER THE PAST MONTH




*95% visited the On Premise this month.*
*+4pp vs January*

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 1002

# VISITATION PLANS FOR THE ON PREMISE MONTH AHEAD

87%

Plan to go out to eat in the next month
*-1pp* vs January

52%

Plan to go out to drink in the next month
+3pp vs January

*5% don't plan to visit the on premise **next month***
*-1pp vs January*

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 - SAMPLE: 1002


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

Change in frequency of visitation

**17%**
Going out more often
+2pp vs January

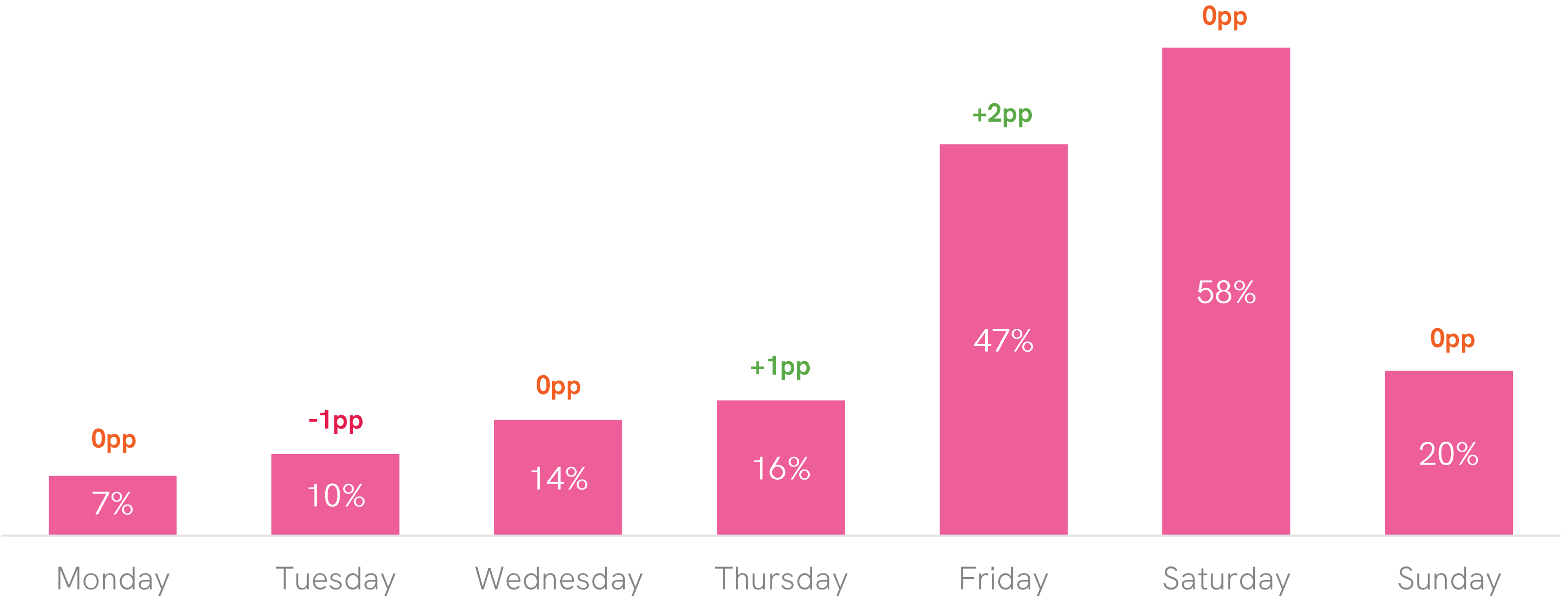
**48%**
Going out the same
+2pp vs January

**35%**
Going out less often
-4pp vs January

*SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 1002*

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

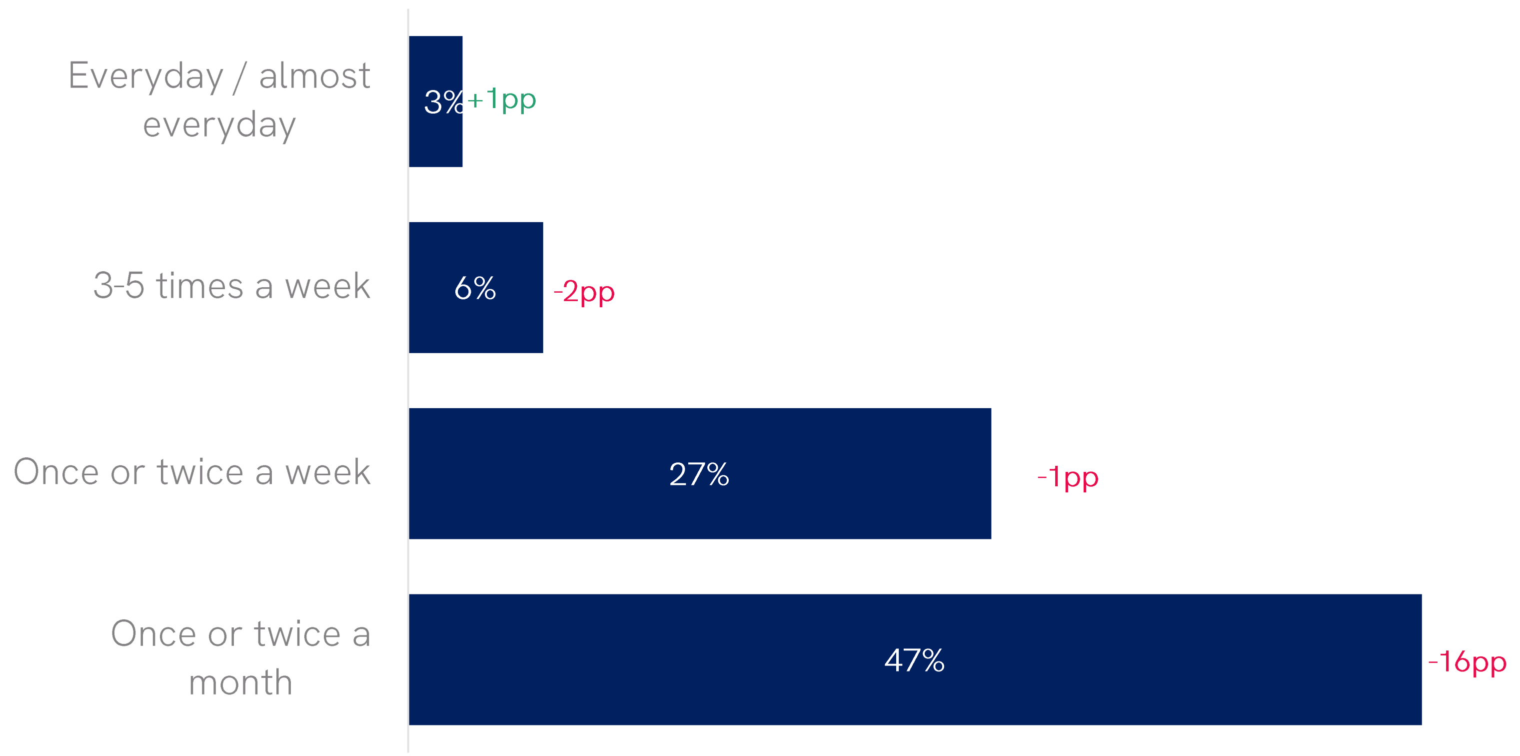
Days of the week visited (vs January)




SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 1002

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

Visiting habits (vs January)



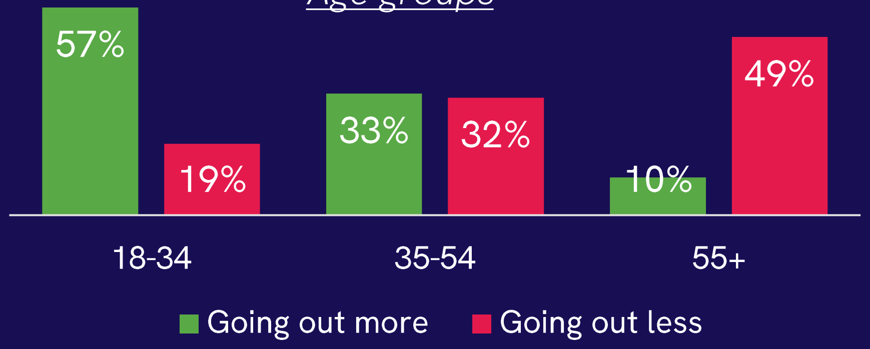


SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 960

# 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*

♂ 58% 46%

♀ 42% 54%

*Location of residence*

59% 42%

*City centre / town centre*

41% 58%

*Rural / suburban*

*Average household income*

€52,018

€42,585

*Typically visits the On-Premise…*

*At least weekly* 80% 19%

*At least monthly* 20% 82%

*SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 1002*

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# 38%

Of Gen Z are going out more often this month

+20pp vs average consumer

# 37%

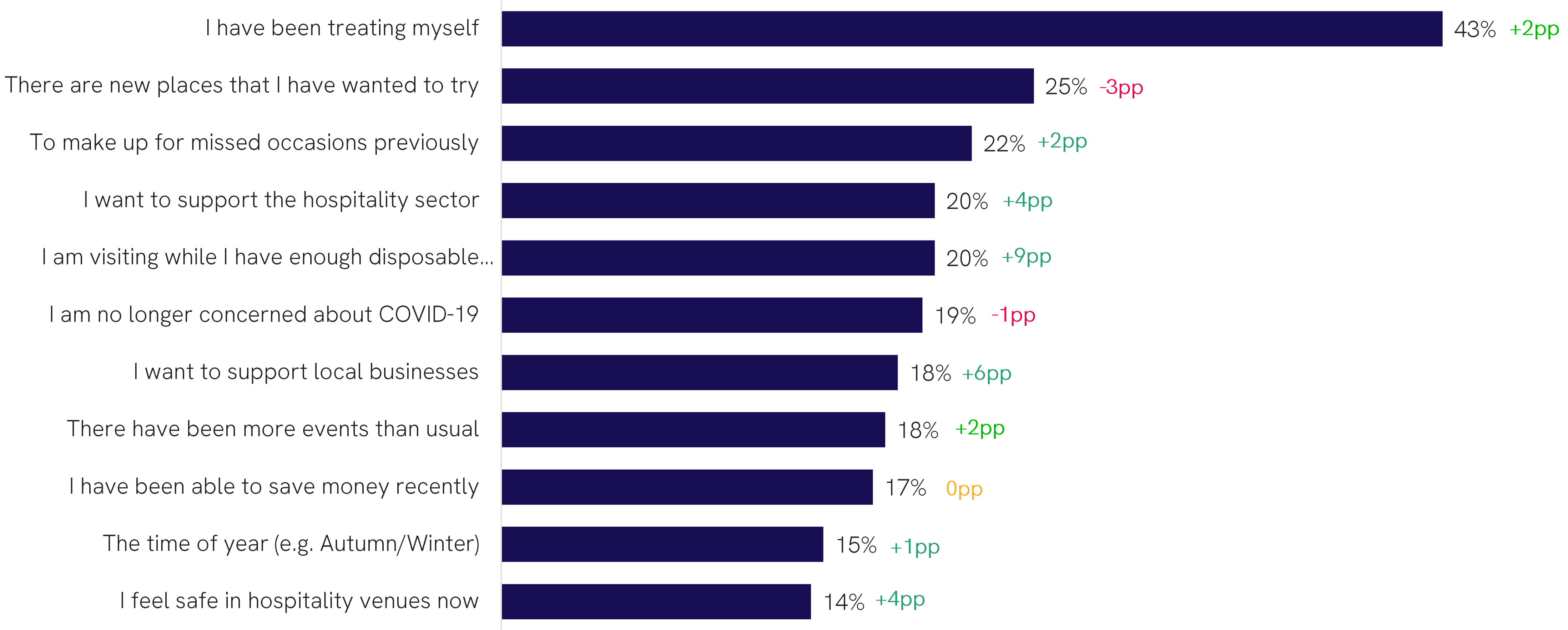
Of Gen Z are spending more overall on eating and drinking out this month

+8pp vs average consumer

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEB 2024 – SAMPLE: 180-1002

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

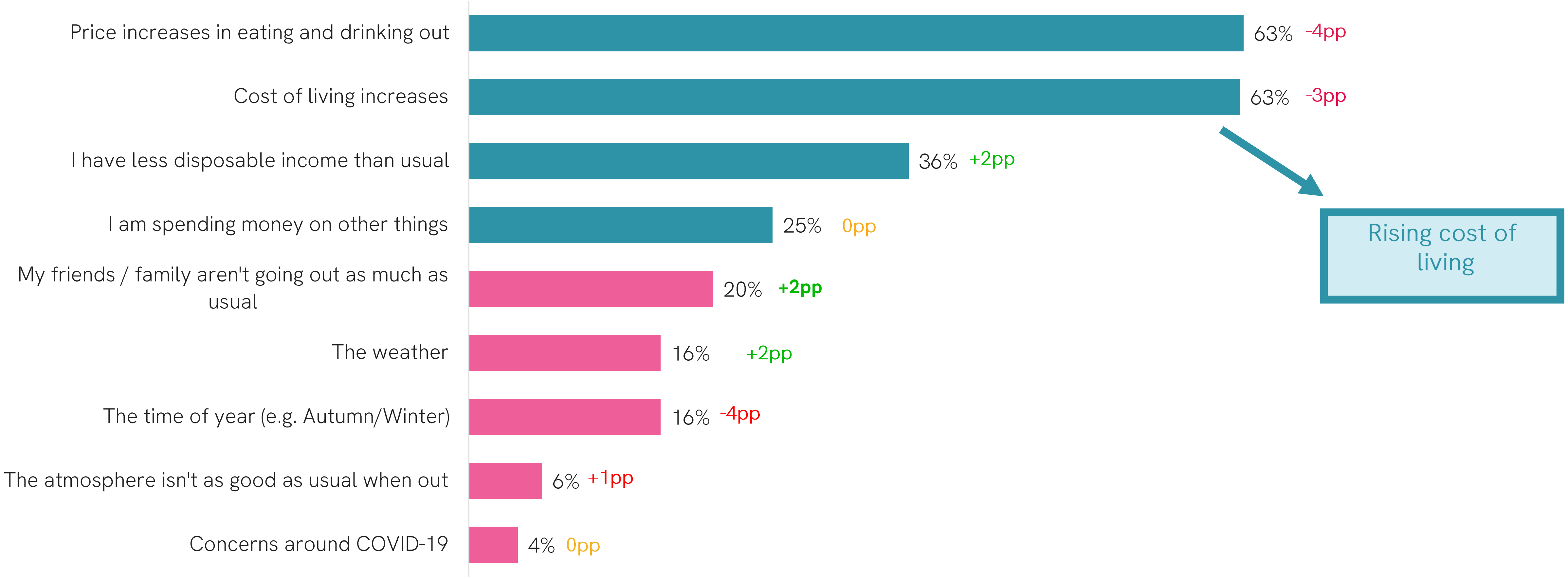
Reasons for going out to the On Premise more frequently than usual (vs January)




*SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 175*

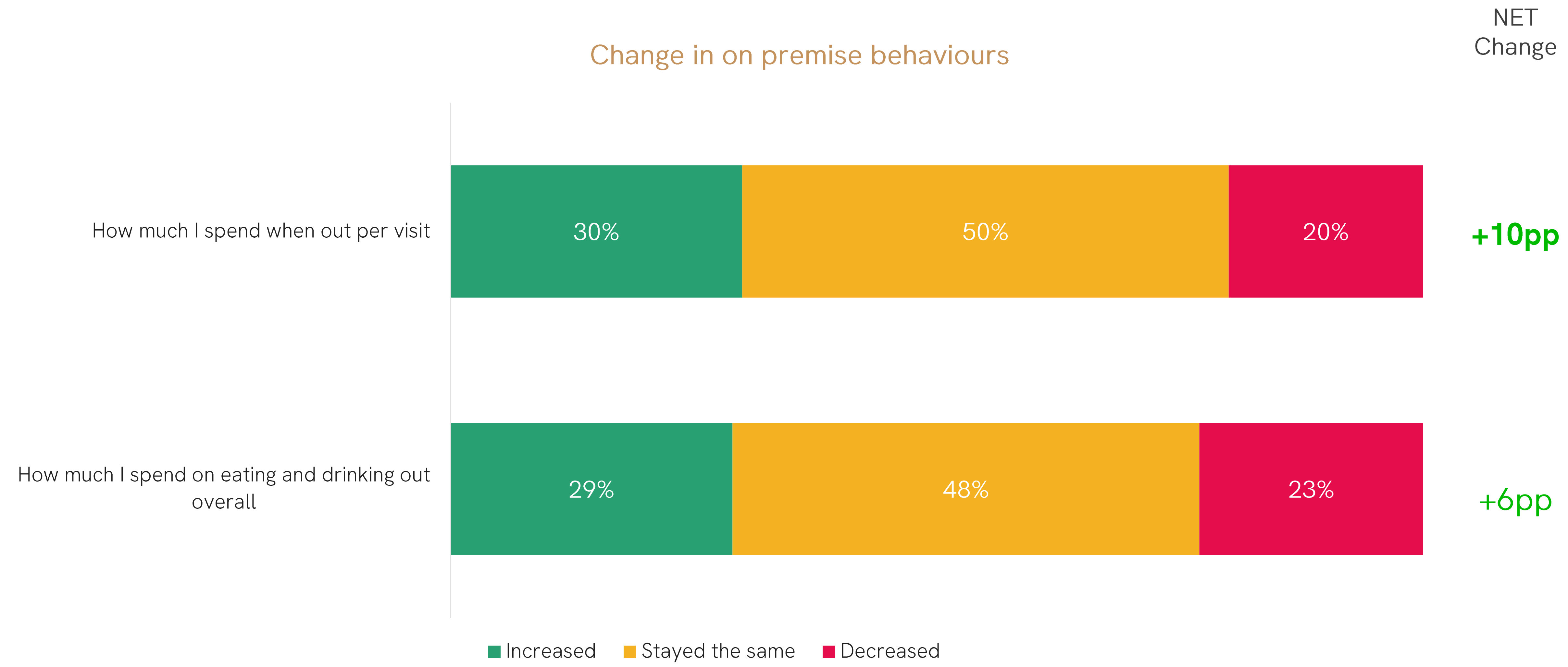
# YOU SAID THAT YOU ARE CURRENTLY GOING OUT LESS FREQUENTLY THAN USUAL, WHY IS THIS?

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



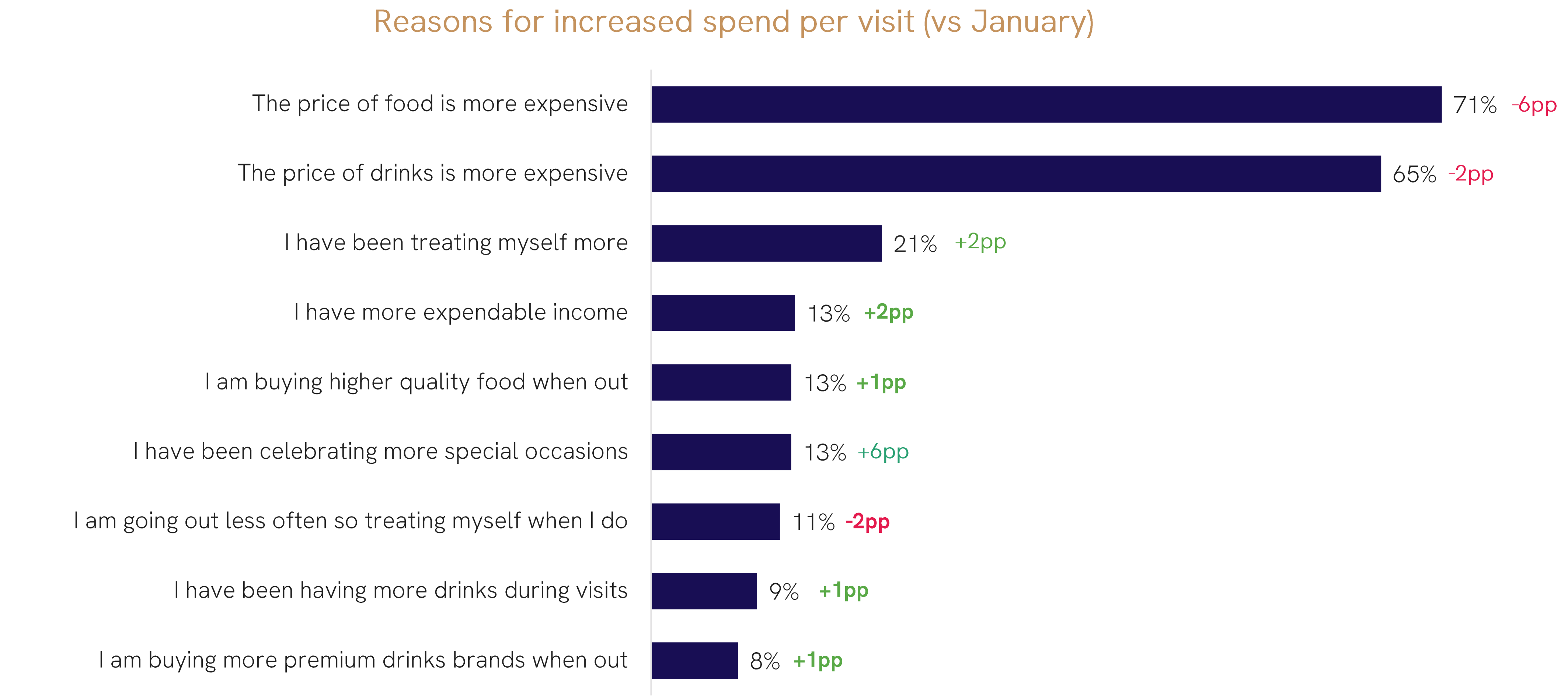

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 350

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



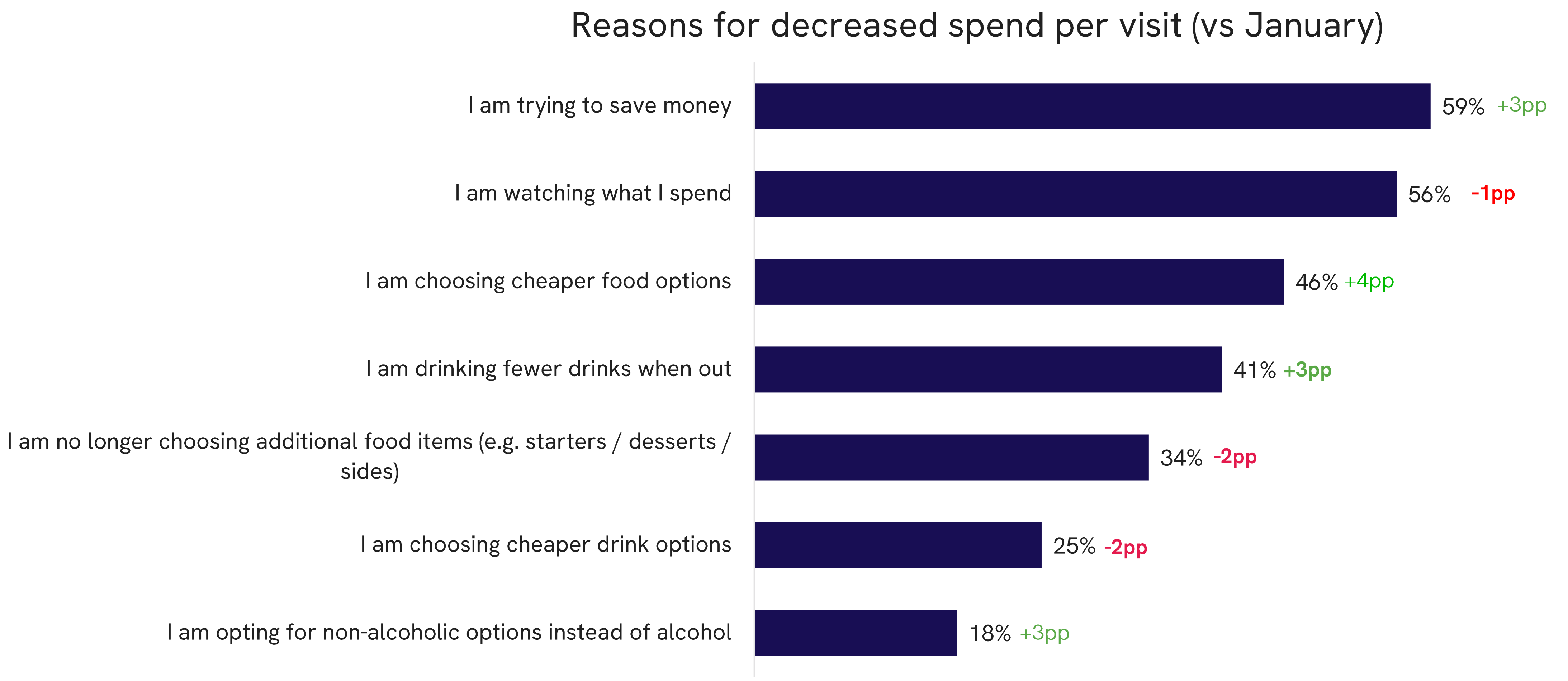

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 1002

# 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 FEBRUARY 2024 – SAMPLE: 296*

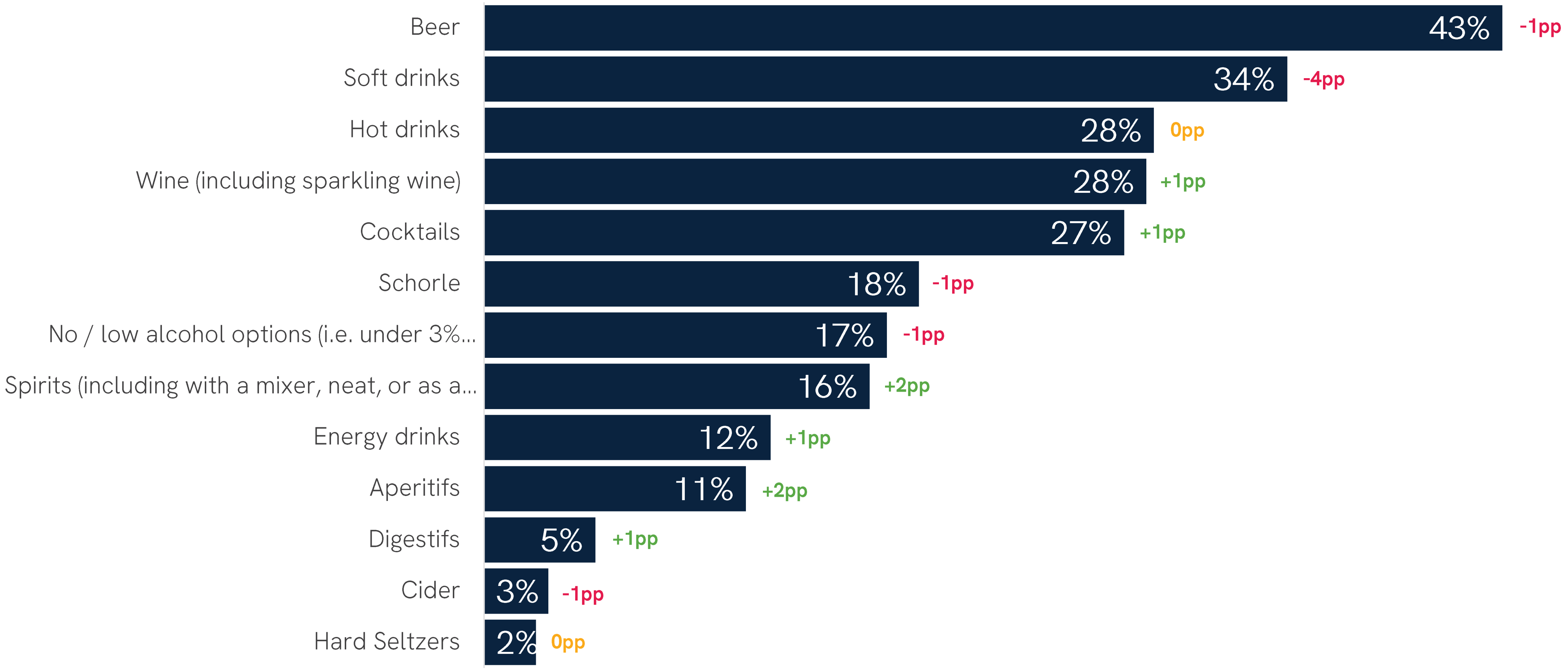
# WHICH IF ANY OF THE FOLLOWING ARE REASONS WHY YOU ARE SPENDING LESS NOW WHEN OUT PER VISIT IN BARS, RESTAURANTS AND OTHER SIMILAR VENUES?




*SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 232*

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

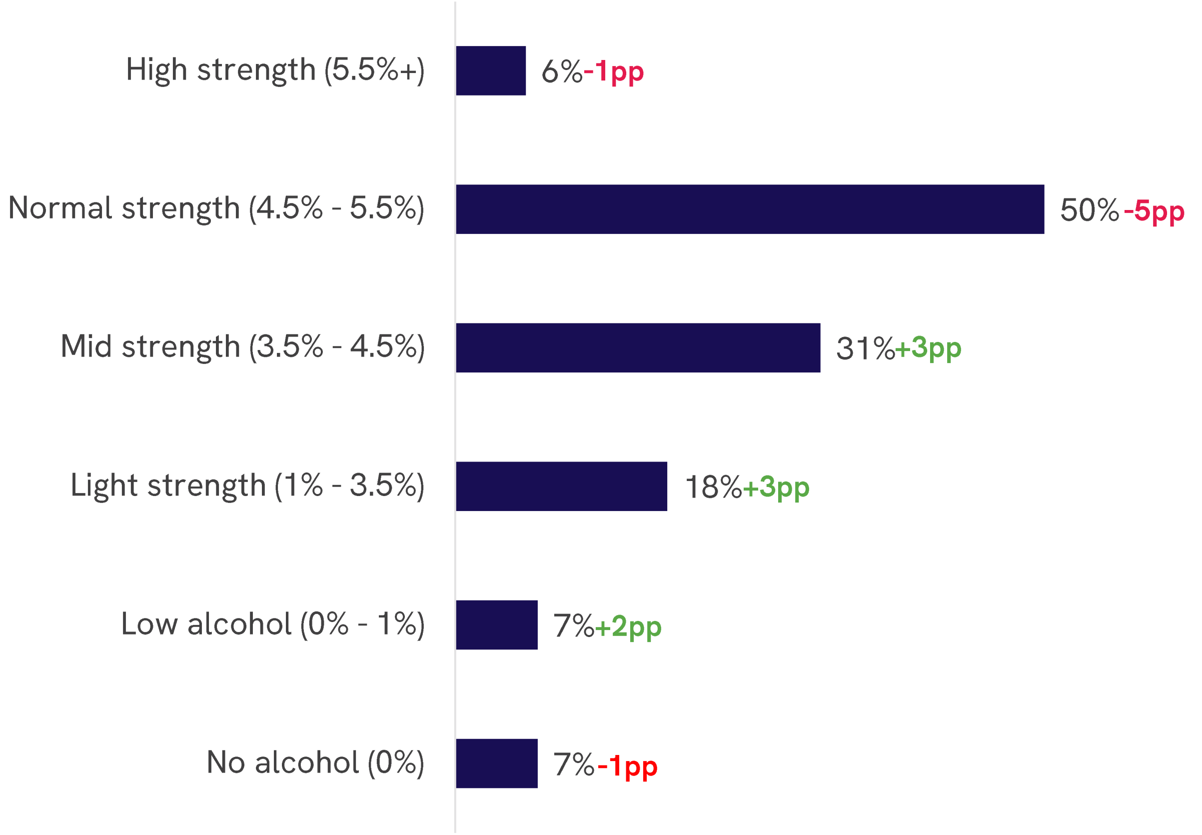
Drink choice of those who have visited the On Premise in the past month (vs January)




SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 412

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

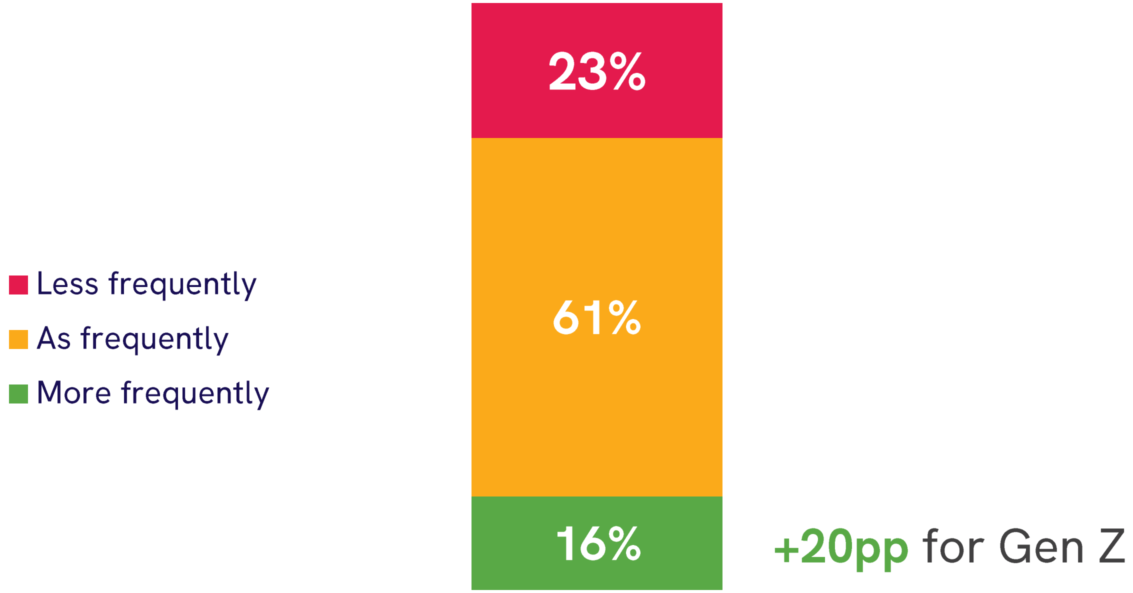
Strengths of beer consumers have drunk in the past month (vs January)




SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 412

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

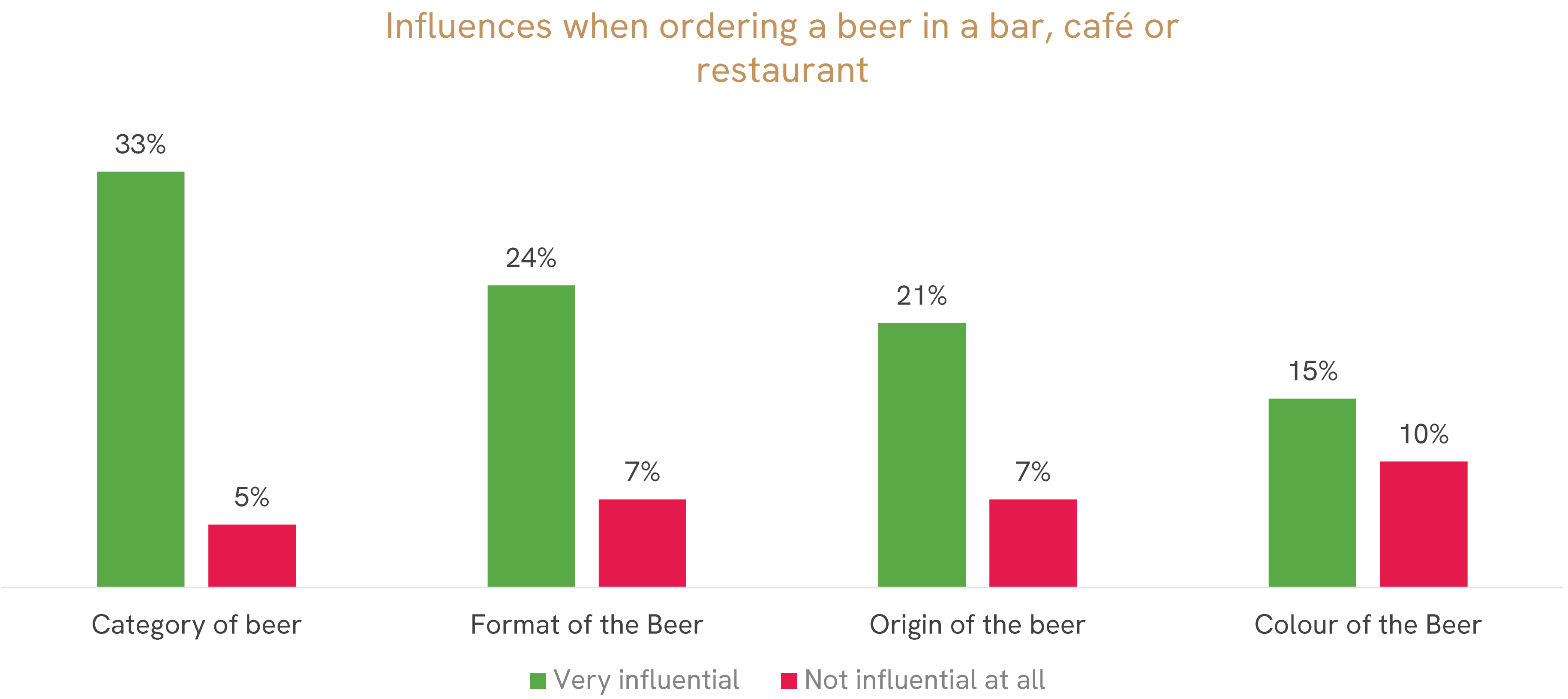
Frequency of planning to visit bars, restaurants or other similar venues over the next month




SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 179-999

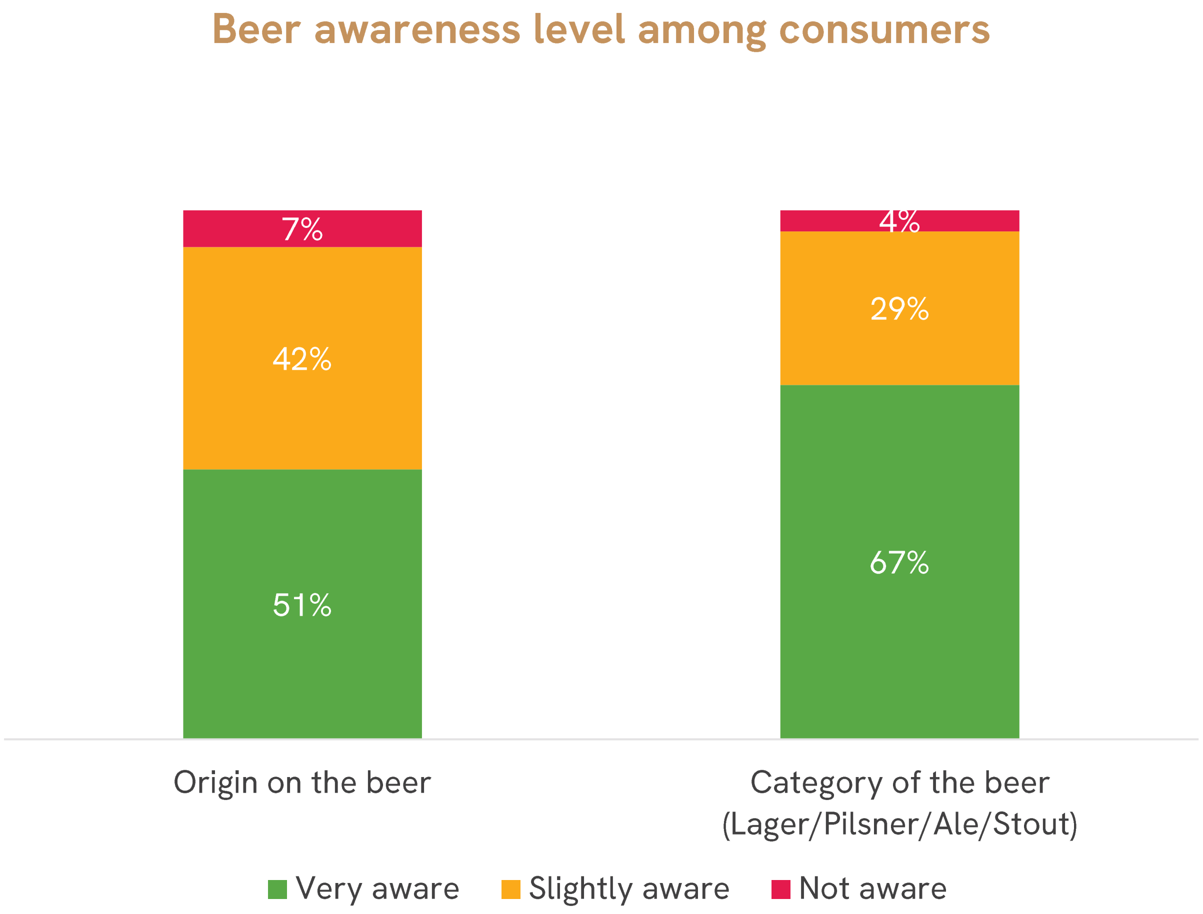
# Hot Topic – Beer deep dive

# HOW MUCH DO THE FOLLOWING INFLUENCE YOUR CHOICE OF BEER WHEN VISITING A BAR, CAFE OR RESTAURANT?




SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 408 - 411

# WHEN ORDERING A BEER HOW AWARE ARE YOU OF THE FOLLOWING?




SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 399, 406

# 42%

of consumers would be very interested in learning more about the origin of the beer

# 47%

of consumers would be very interested in learning more about the category of beer

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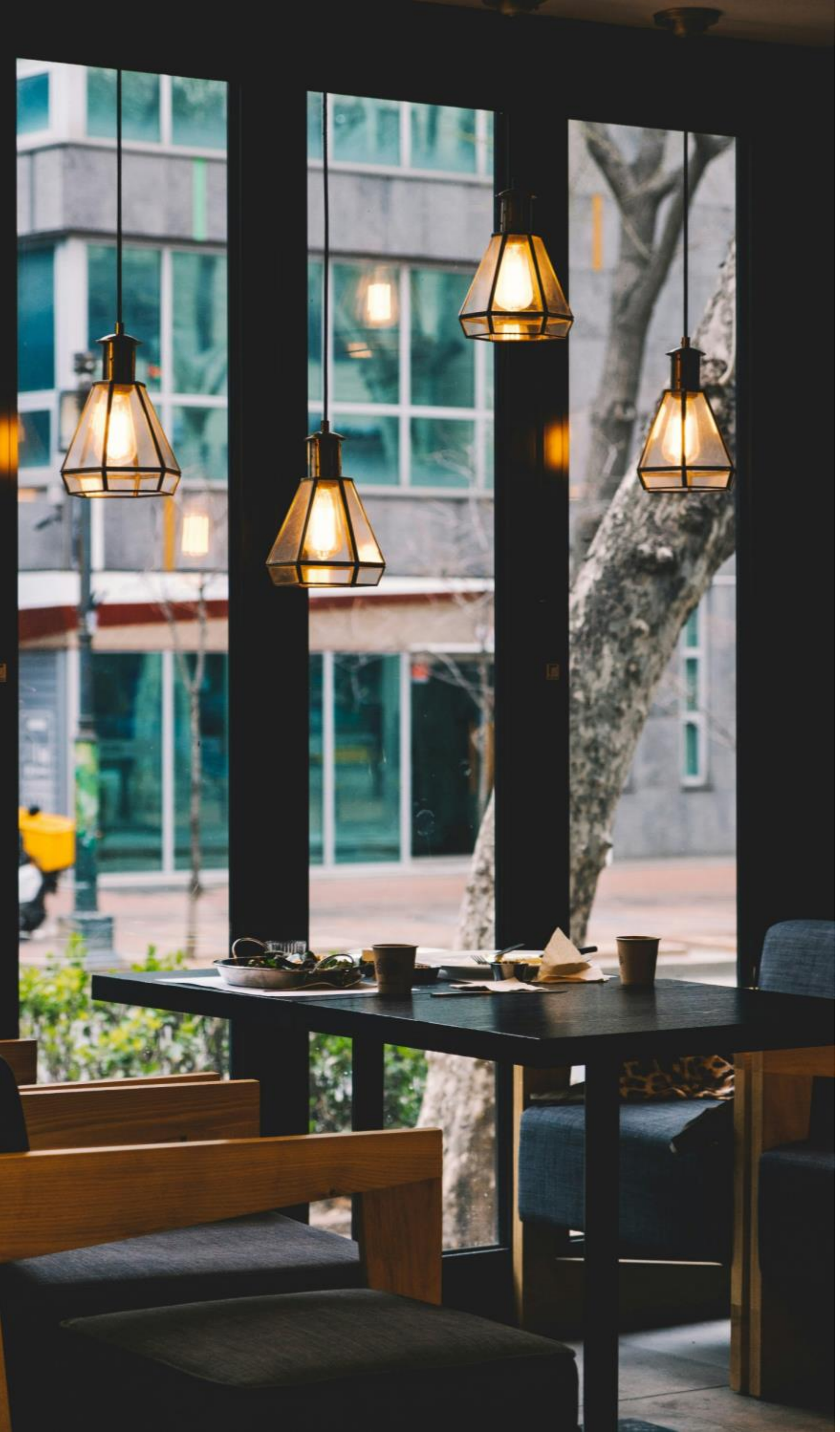
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 399, 406

# WHAT IS YOUR PREFERRED FORMAT WHEN CHOOSING TO DRINK BEER OUT?

## Consumer preference among beer types

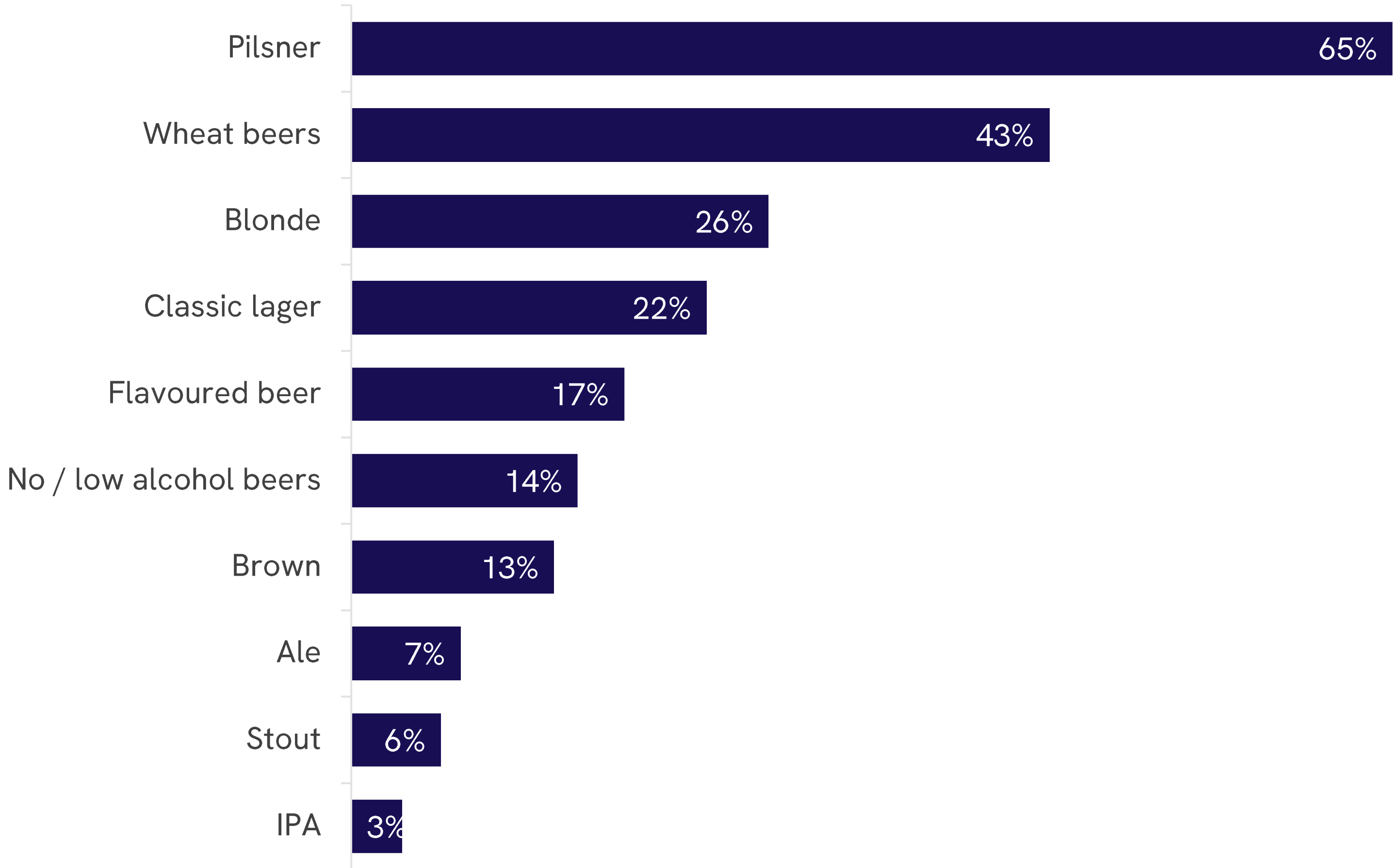
| Draught beer | Bottled beer | Canned beer |
|---|---|---|
| 63% | 33% | 4% |

*SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 412*



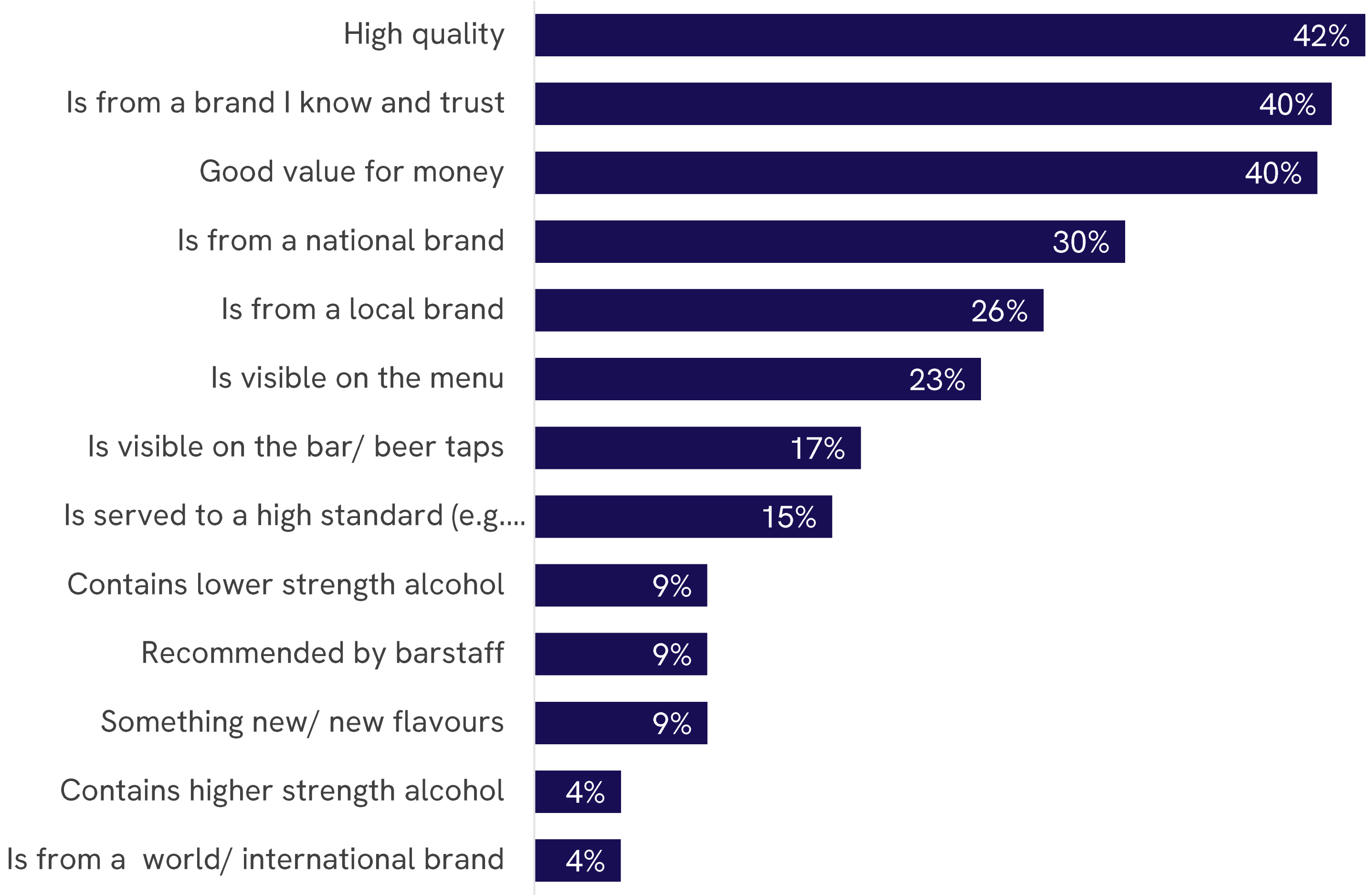
# WHICH OF THE FOLLOWING TYPES OF BEER DO YOU DRINK WHEN OUT?

## Top beer types drank by consumers when out




*SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 412*

# COMPARED TO 1 YEAR AGO, IT IS MORE IMPORTANT THAT THE BEER I DRINK IS...




*SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 412*

# 34%

of consumers have been on holiday last year where the main motivation was to try new beer from that country, visit breweries or got to a beer festival

33% would consider it

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 411

# Hot Topic – Winter/skiing holidays

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# 25%

of consumers are planning or have already been on a skiing/winter holiday this year

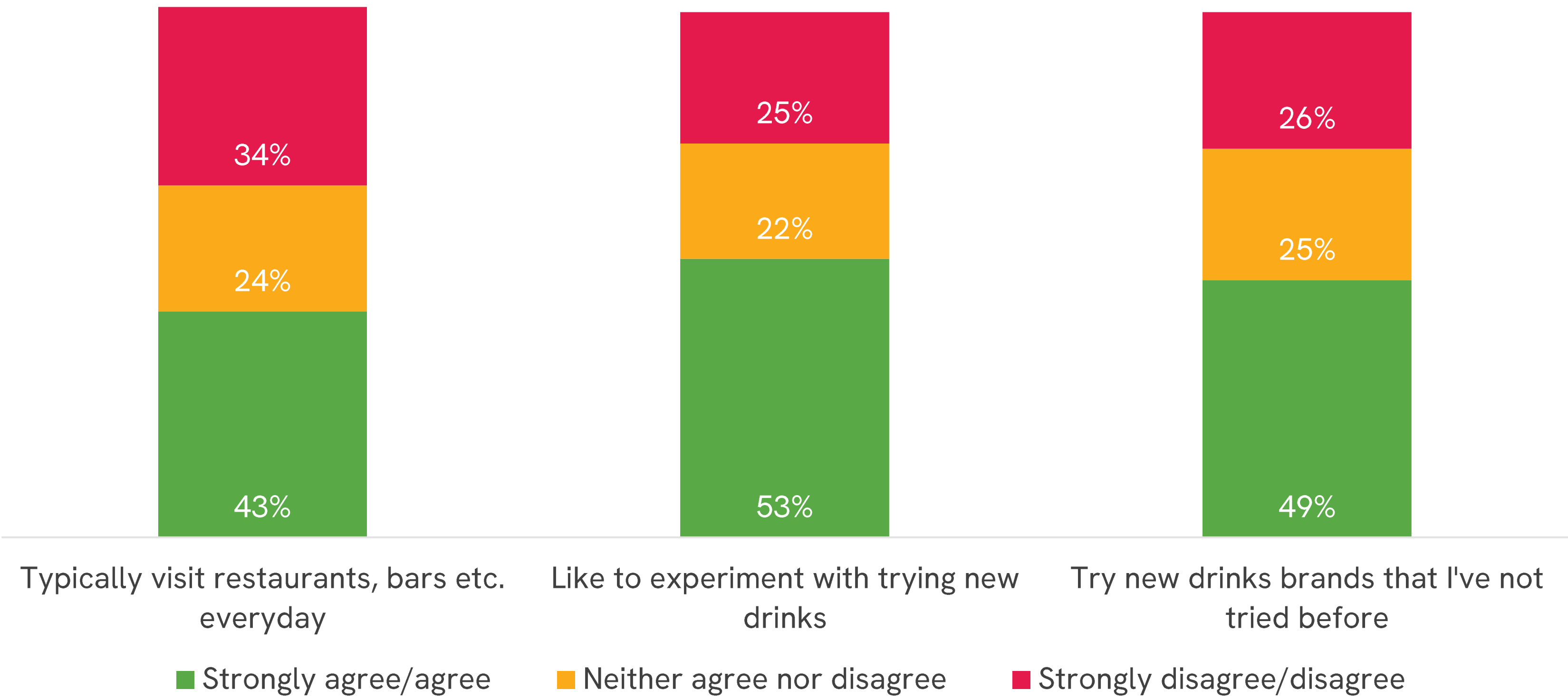
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 1002

# ARE YOU PLANNING ON STAYING / WAS YOUR SKIING TRIP IN YOUR HOME COUNTRY?

## Location of skiing/winter trip

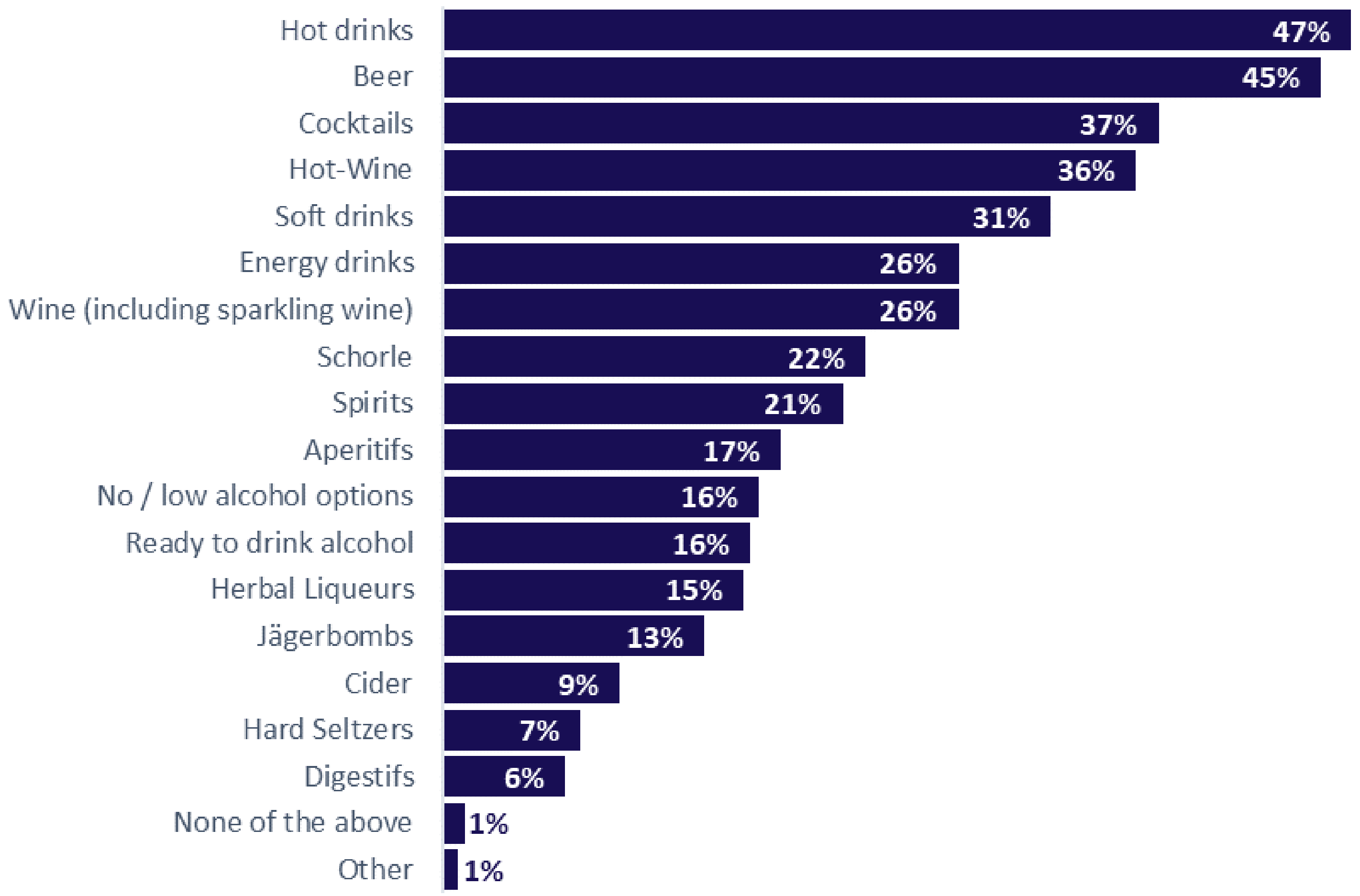
| Yes | No |
|---|---|
| 63% | 37% |

# HOW STRONGLY DO YOU AGREE WITH THE FOLLOWING STATEMENTS? WHEN I AM ON A WINTER / SKIING HOLIDAY I…




*SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 250 -252*

# WHEN ON YOUR SKIING TRIP WHICH OF THE FOLLOWING DRINKS CATEGORIES DO YOU TYPICALLY DRINK?




*SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 250 -252*

# Hot Topic –
# Local/national brands

# 44%

Of consumers would prefer to have the ingredients including in their meal made by local brands or ingredients

**24%** would prefer national brands or ingredients

Just **5%** would prefer international/ world brands

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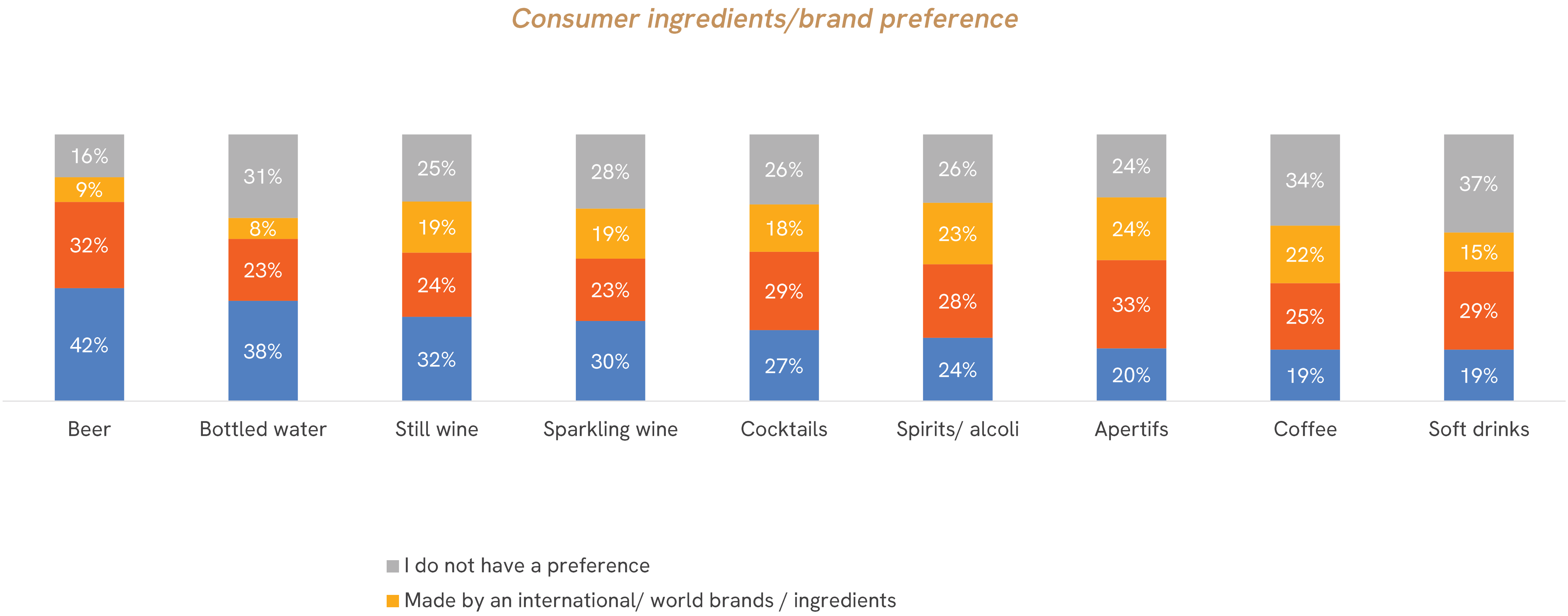
*SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 999*

# WHEN ORDERING THE FOLLOWING WHEN OUT, WHICH WOULD BE YOUR PREFERENCE?




SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT FEBRUARY 2024 – SAMPLE: 106 - 990

# 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 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 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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