GERMANY ON PREMISE CONSUMER PULSE REPORT

CGA by NIQ, March 2024

CGA Powered by NIQ

SUMMARY: TOPLINE VISITATION & SUSTAINABILITY

- Despite less wet-led visits to the On Premise over the past month, consumers show promise to increase their drinking in venues as we enter April.Building on that, weekly visitation figures are increasing in comparison to February rates; however monthly visits still remain the most popular for German drinkers
- The increasing cost of living has the biggest impact on consumers regarding less visitations to the On-Premise, adding to the growing cognition that On Premise visits now serve as a treat to consumers rather than integral to their lifestyles
- Beer is still the top consumed category for consumers during March, and still shows momentum to grow throughout April with Hot Drinks also demonstrating an increase in popularity for consumers
- Consumers express sustainability awareness within their On Premise decisions, with consumers showing preferences for drinks which are locally sourced, and which have lower levels of emissions during production processes
- Sustainability initiatives combined with more affordable options will be the biggest driver to drive consumers towards the water category
- Sparkling water boasts the highest consumption rates across all types of venues, with higher water consumption overall in premium and high-end outlets. German drinkers express a preference for bottled drinks, with over half saying that a range of brands is important to them
- The Euros are offering a great opportunity with 47% of consumers reporting they will visit the On Premise for that specific reason

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 February 2024 to March 2024 in Germany.
- This study looks into 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 **March 2024** issue, we surveyed 1001 consumers (aged 18+) between the 22nd March – 2nd April 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 **sustainability, water consumption in restaurants** as well as the **football euros 2024.**

KEY METRICS / ON PRESENTATION

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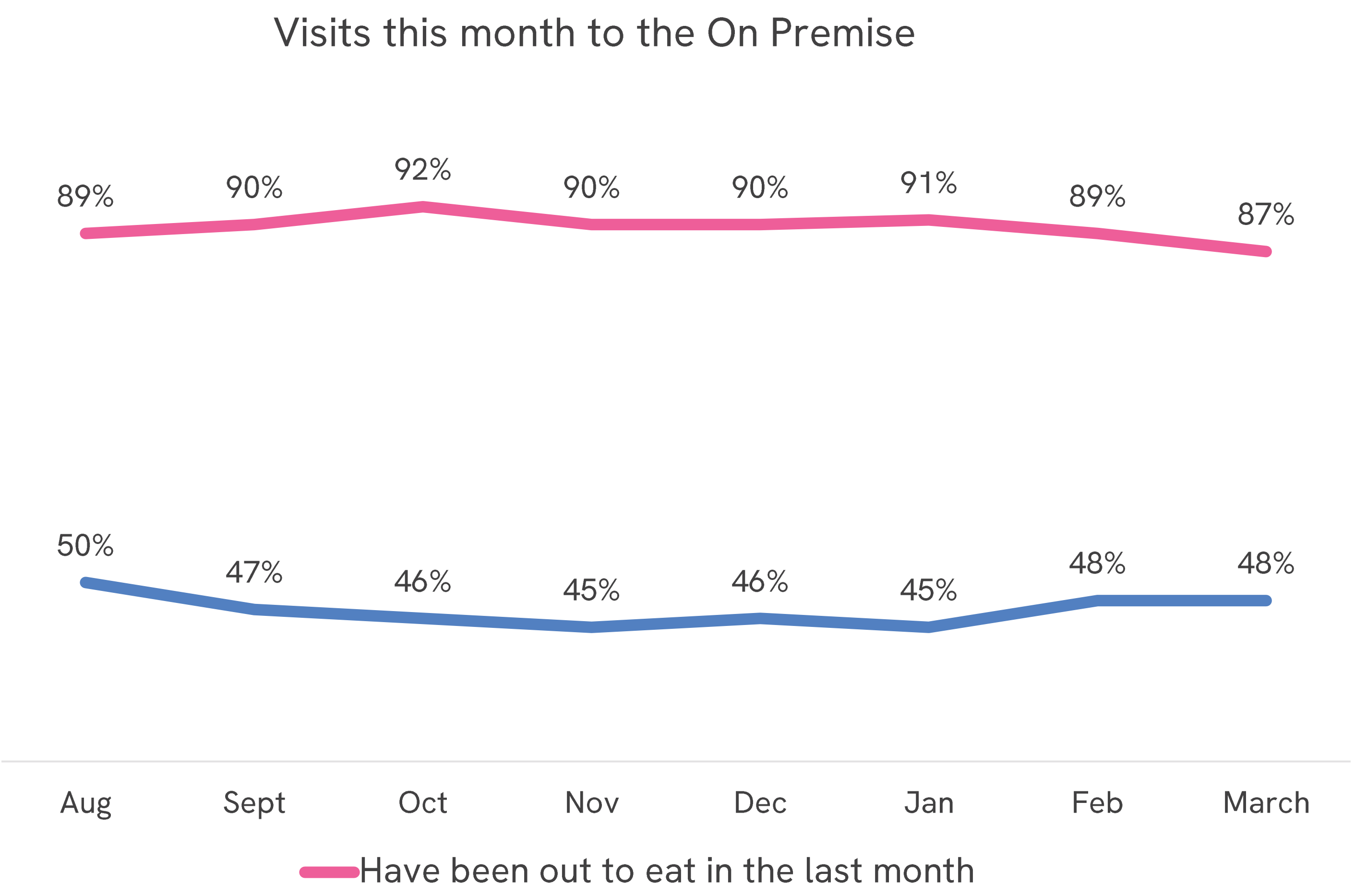
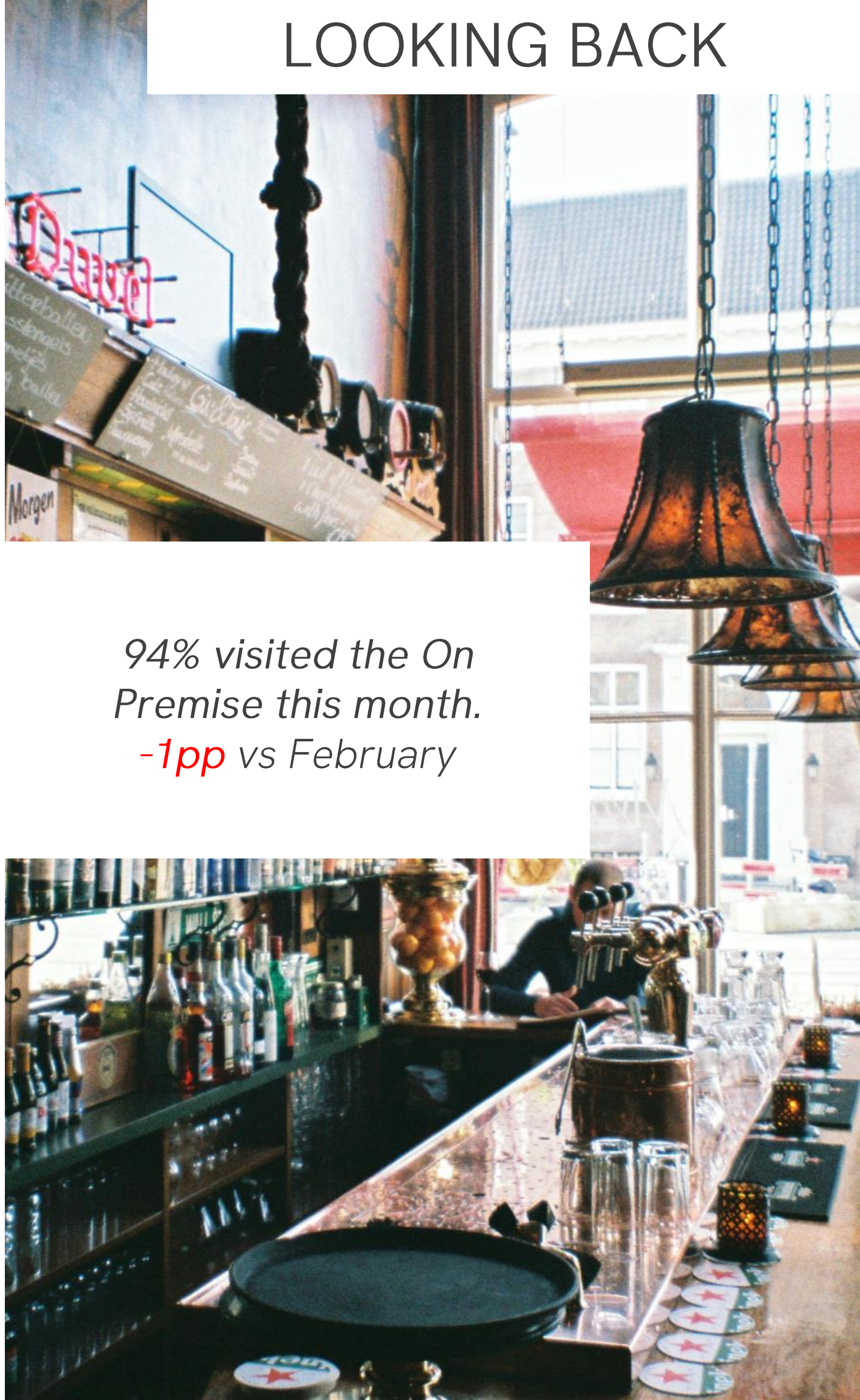
VISITATION IN THE ON PREMISE OVER THE PAST MONTH





94% visited the On Premise this month. -1pp vs February

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 1001

VISITATION PLANS FOR THE ON PREMISE MONTH AHEAD

87%

Plan to go out to eat in the next month

=0pp vs February

52%

Plan to go out to drink in the next month

+1pp vs February

*6% don't plan to visit the On Premise **next month***

+1pp vs February

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 1001

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

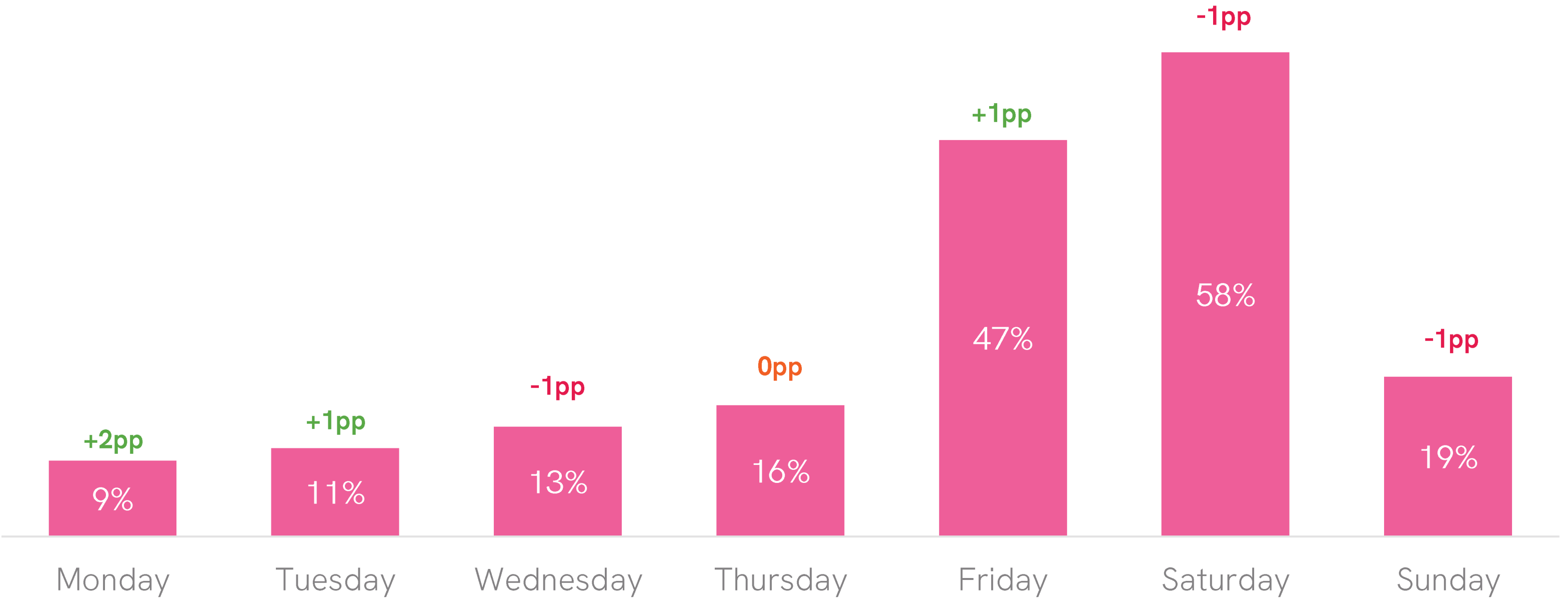
Change in frequency of visitation

15%	49%	36%
Going out more often	Going out the same	Going out less often
-3pp vs February	+2pp vs February	+1pp vs February

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 1001, 1002

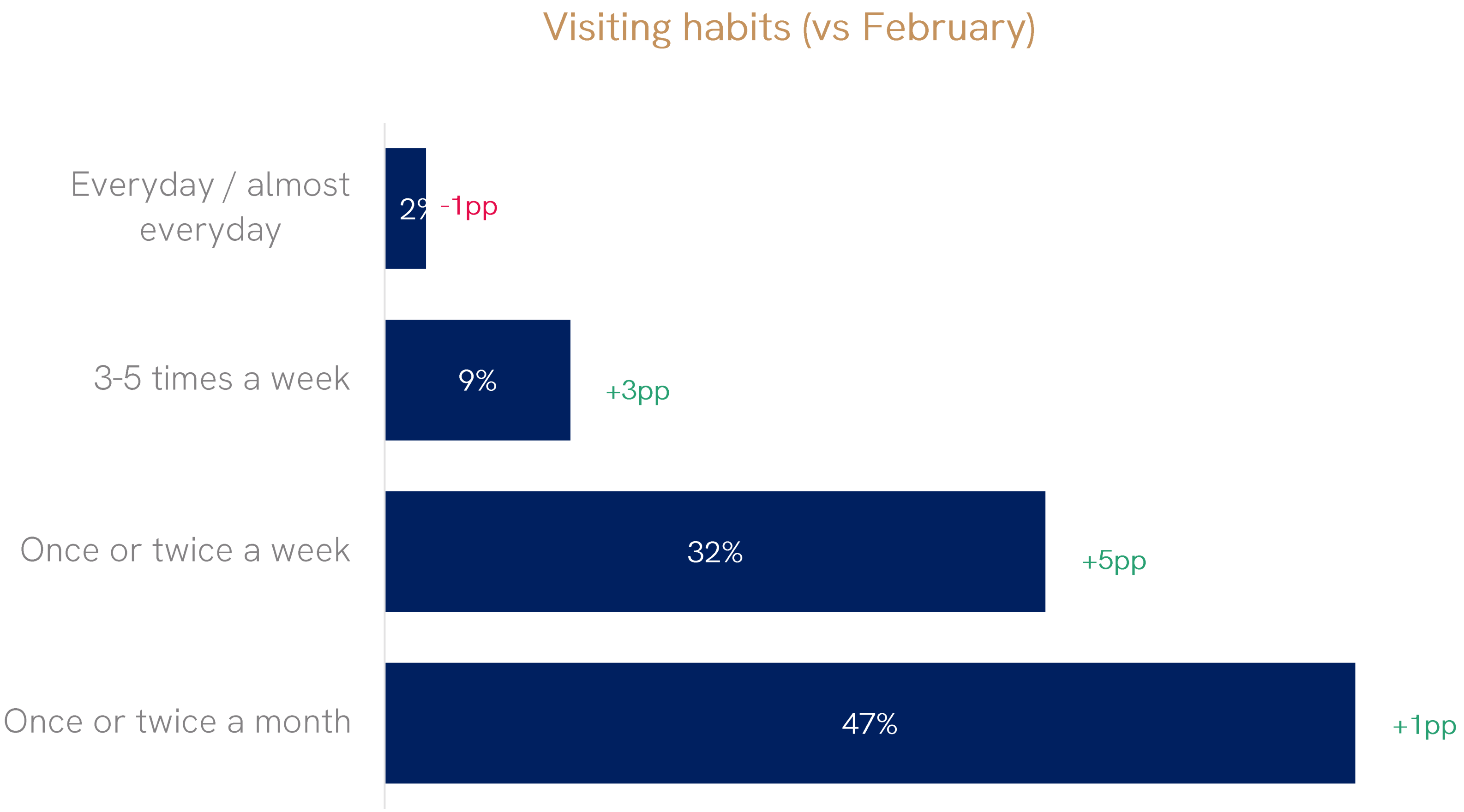
ON WHICH DAY(S) OF THE WEEK HAVE YOU VISITED A BAR, RESTAURANT OR OTHER SIMILAR VENUE OVER THE PAST MONTH?

Days of the week visited (vs February)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 1001, 1002

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

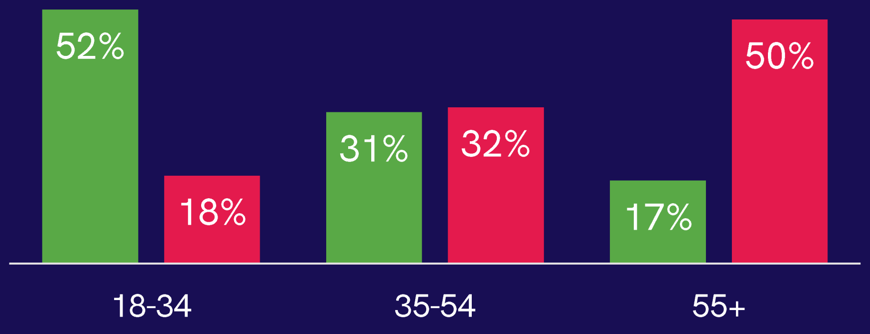


SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 937, 952

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

	Male	Female
Going out more	45%	54%
Going out less	45%	55%

Location of residence

	Going out more	Going out less
City centre / town centre	69%	46%
Rural / suburban	31%	54%

Average household income

€47,860 (Going out more)

€36,961 (Going out less)

Typically visits the On Premise…

	Going out more	Going out less
At least weekly	66%	18%
At least monthly	91%	68%

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 135 - 362

31%

Of Gen Z are going out more often this month

+20pp vs average consumer

32%

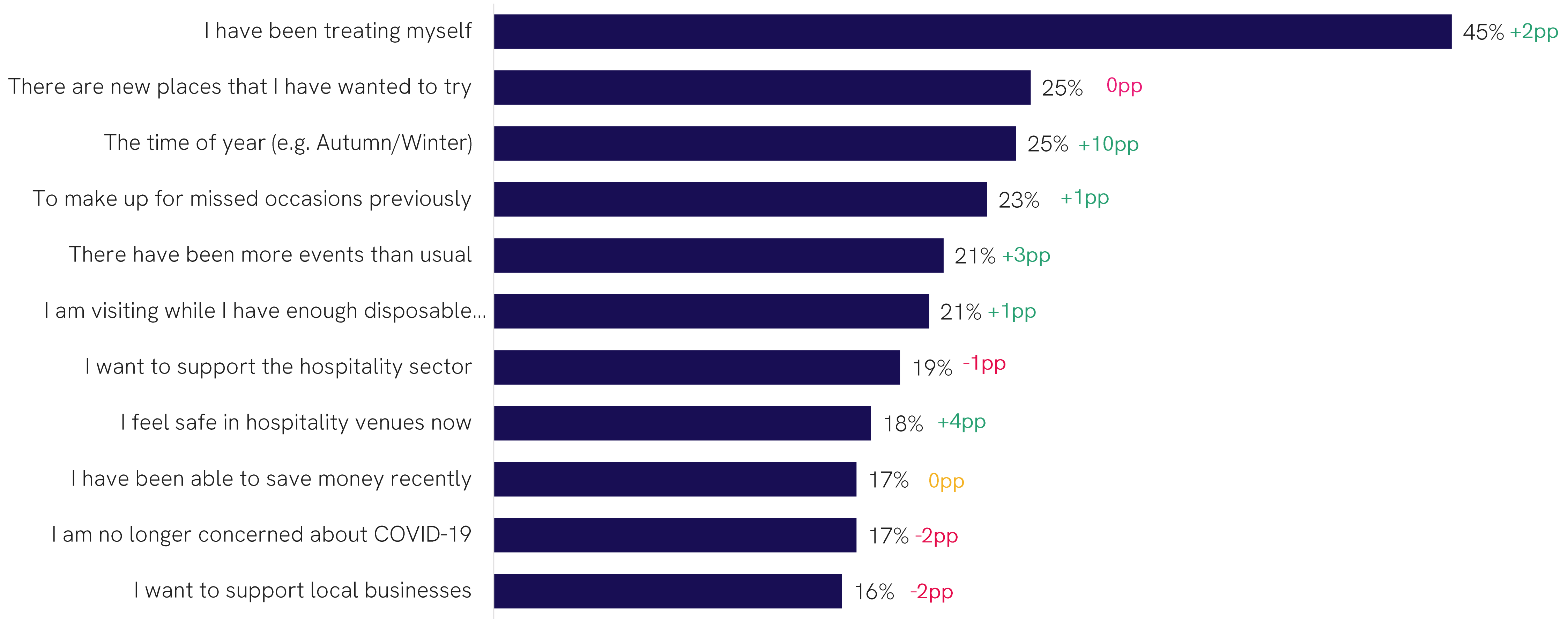
Of Gen Z are spending more overall on eating and drinking out this month

+2pp vs average consumer

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 150-1001

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

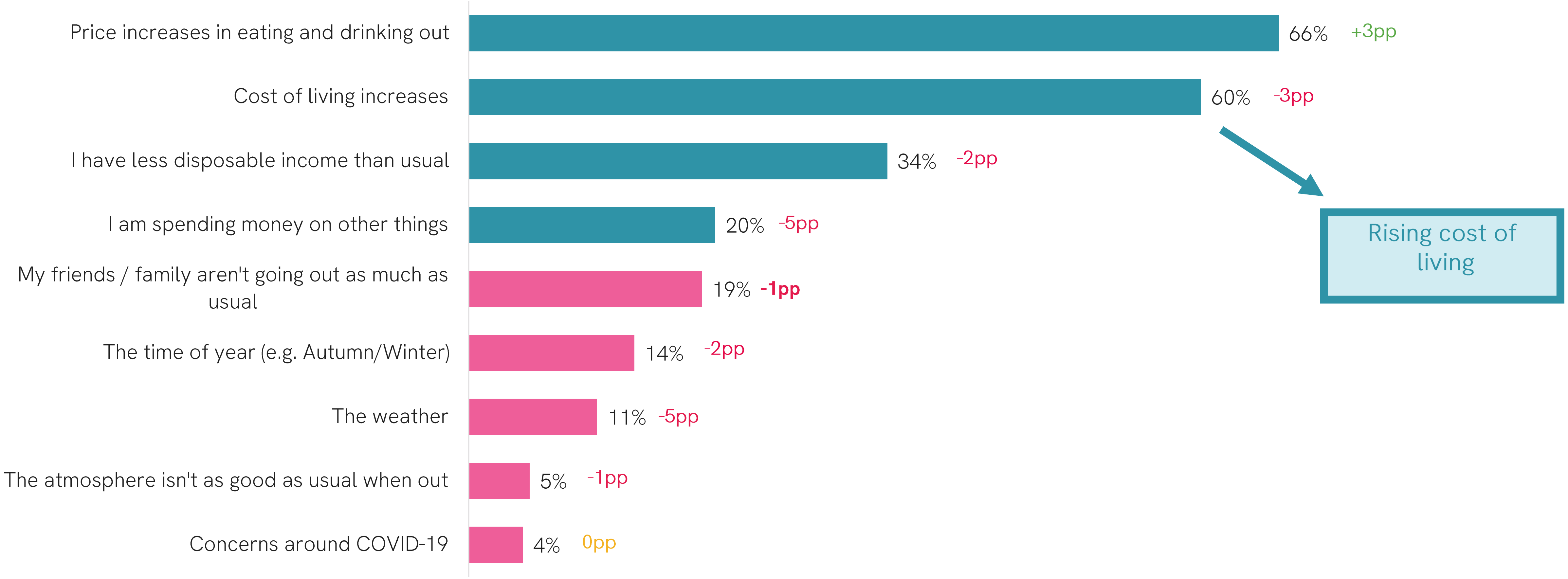
Reasons for going out to the On Premise more frequently than usual (vs February)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 146, 175

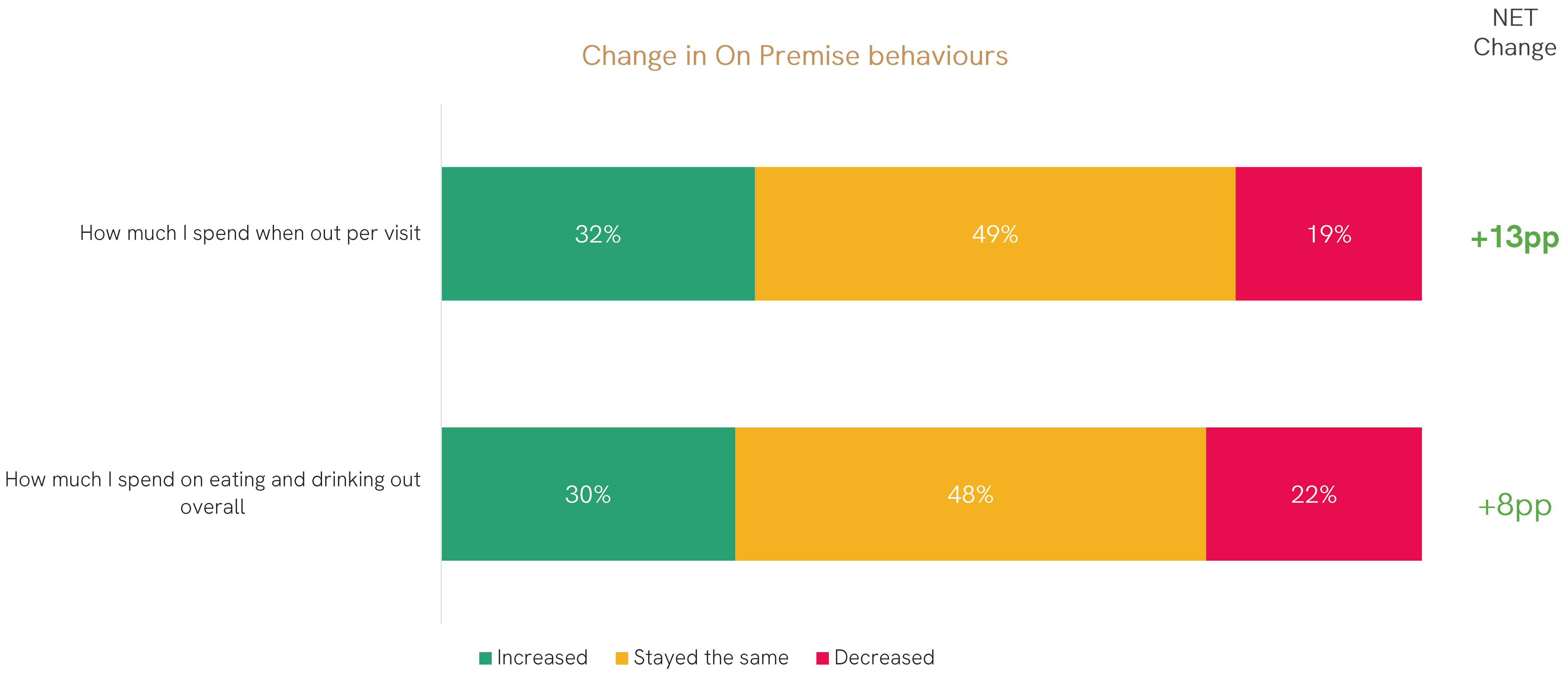
YOU SAID THAT YOU ARE CURRENTLY GOING OUT LESS FREQUENTLY THAN USUAL, WHY IS THIS?

Reasons for going out to the On Premise less frequently than usual (vs February)



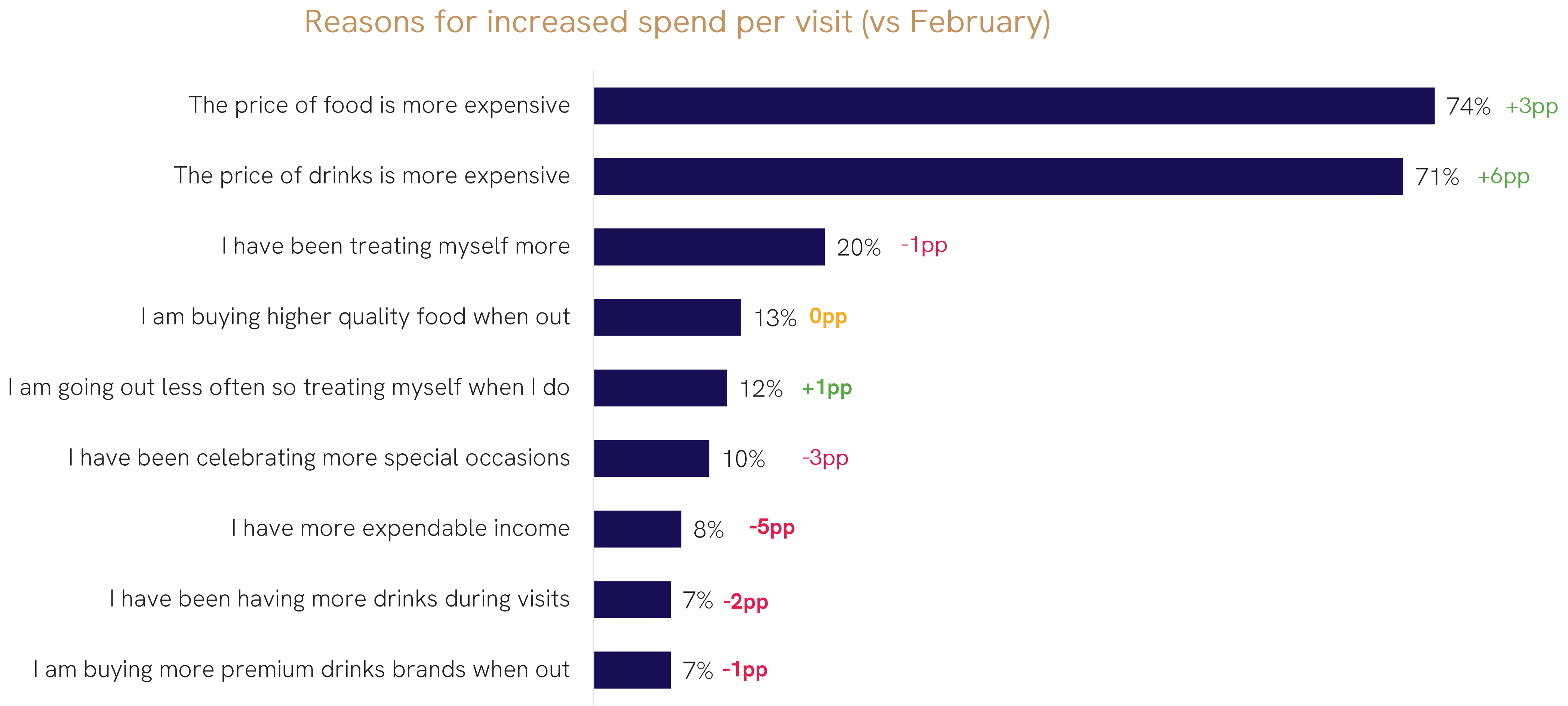
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 350, 362

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 MARCH 2024 – SAMPLE: 1001

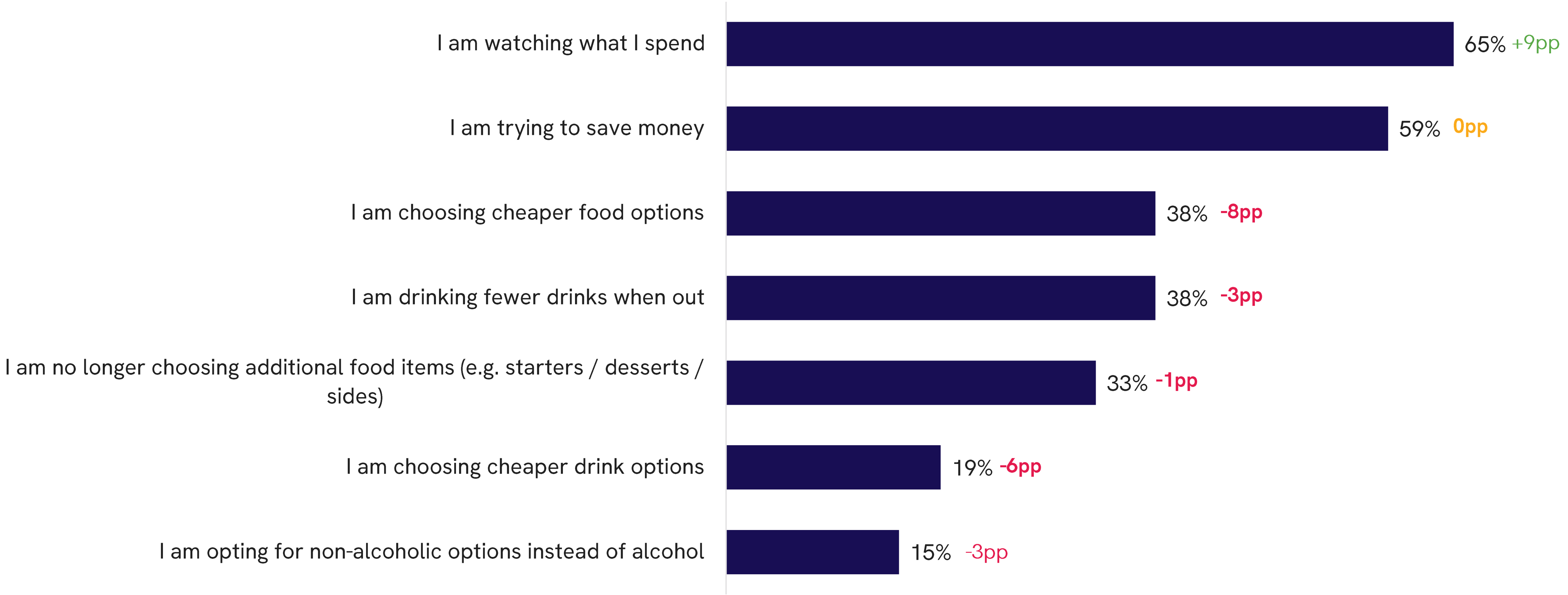
WHICH IF ANY OF THE FOLLOWING ARE REASONS WHY YOU ARE SPENDING MORE NOW WHEN OUT PER VISIT IN BARS, RESTAURANTS AND SIMILAR VENUES?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 296, 324

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?

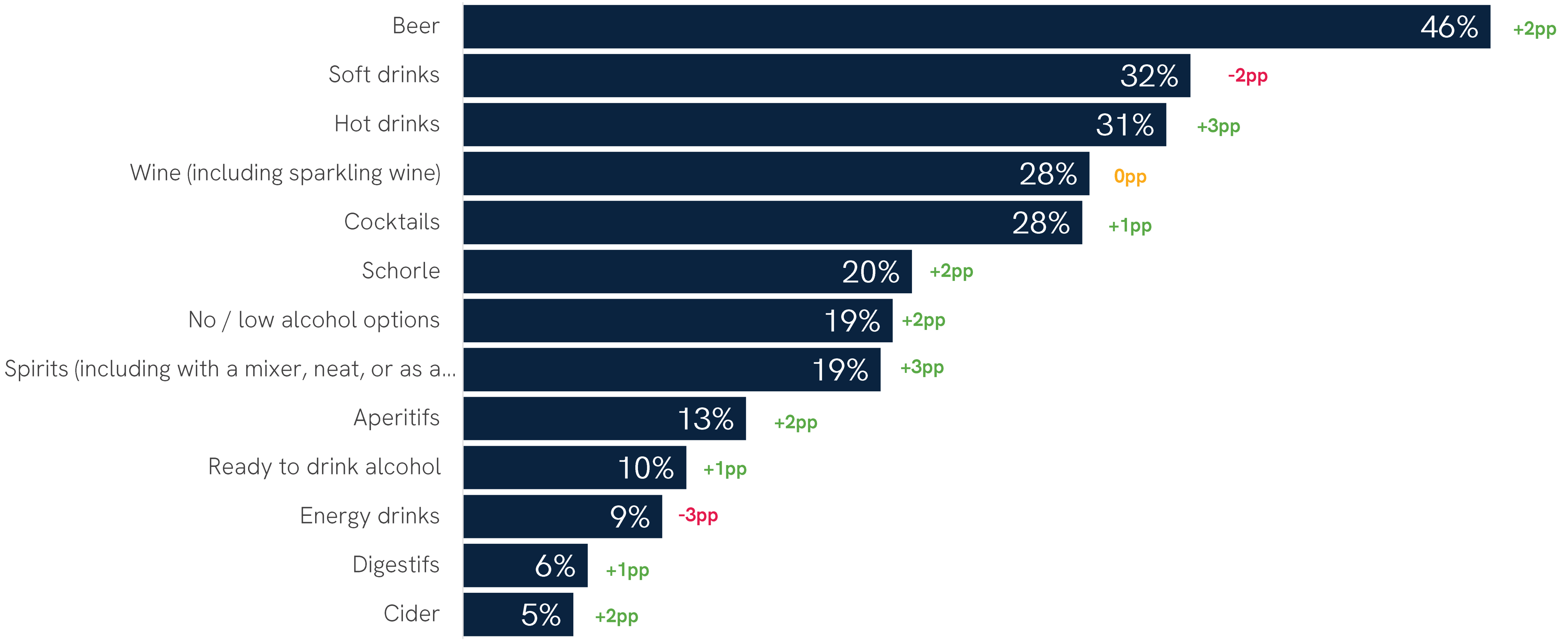
Reasons for decreased spend per visit (vs February)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 189, 204

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

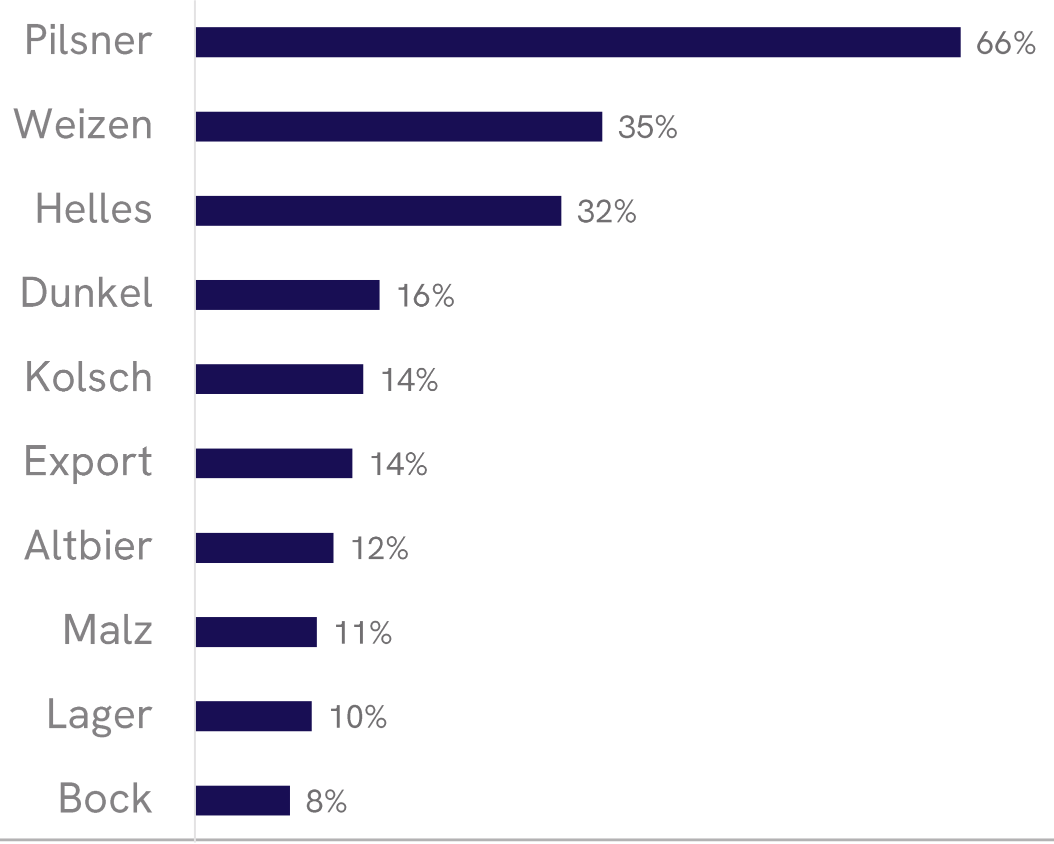
Drink choice of those who have visited the On Premise in the past month (vs February)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 412, 937

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

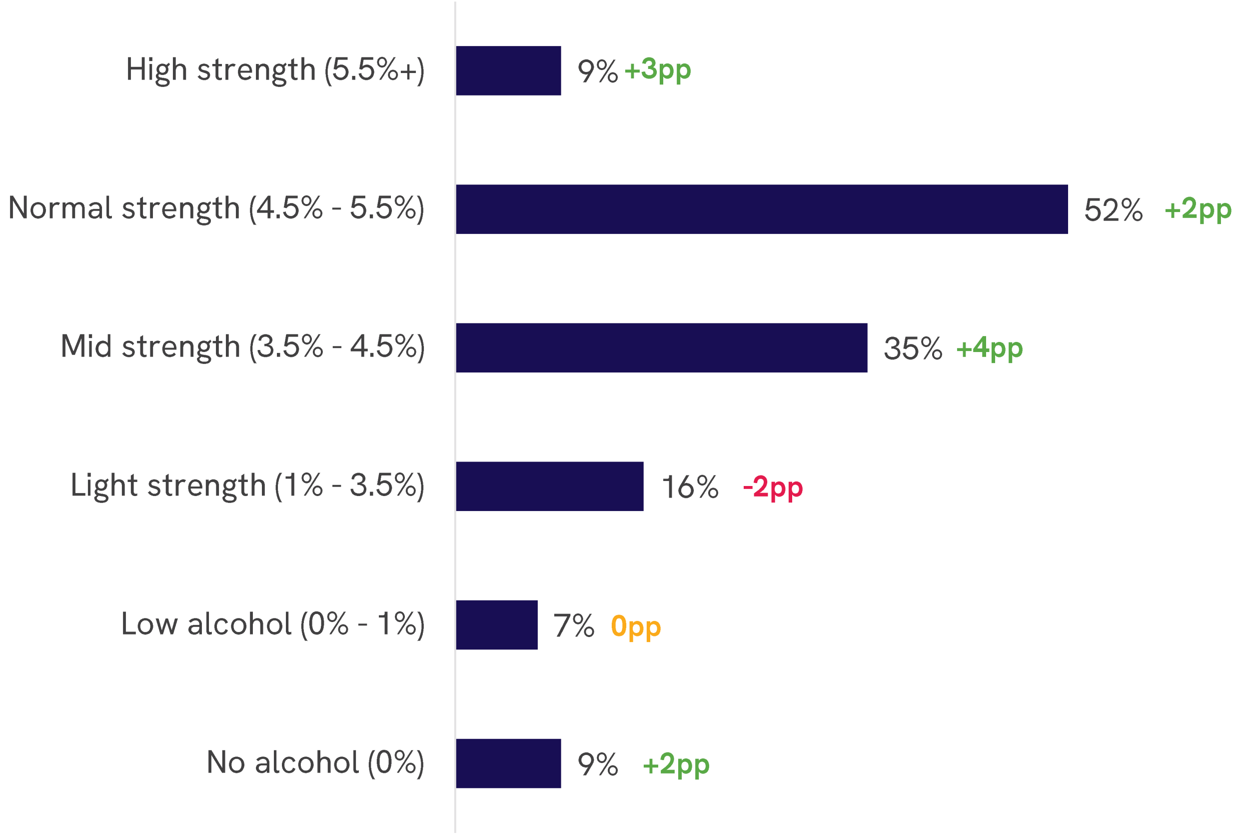
Beertypes consumed in the last month



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 428

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 February)



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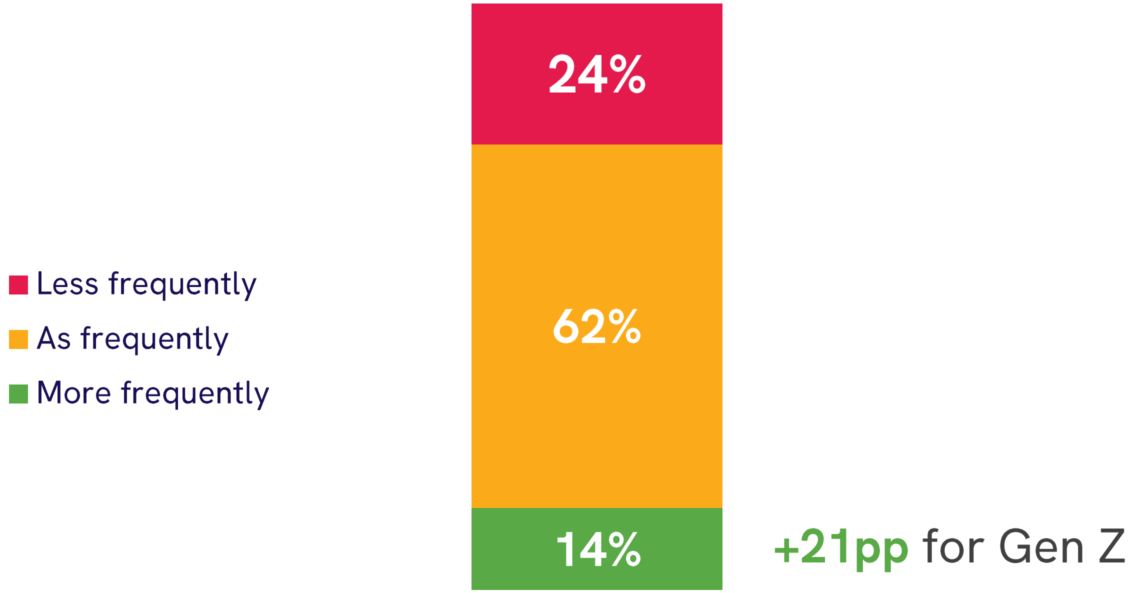
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 412, 428

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

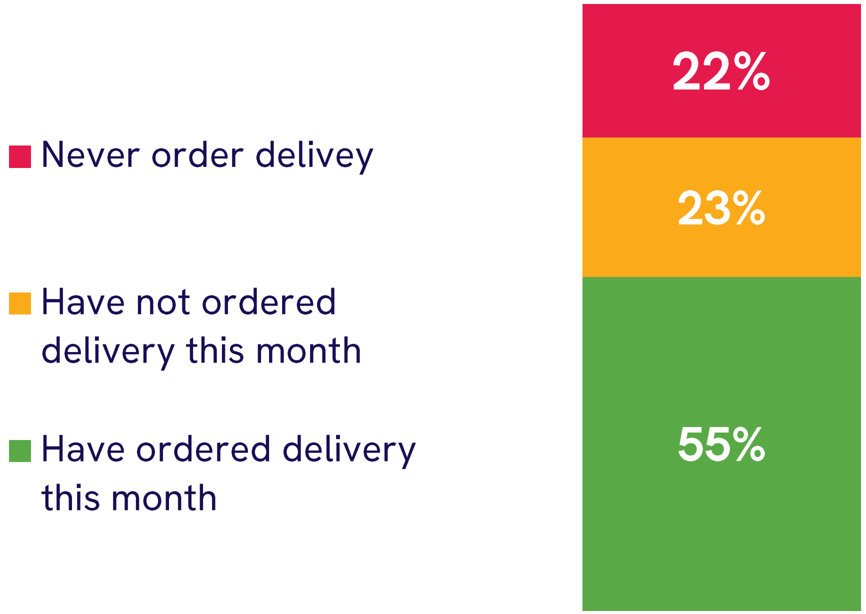
Frequency of planning to visit bars, restaurants or other similar venues over the next month



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 149- 995

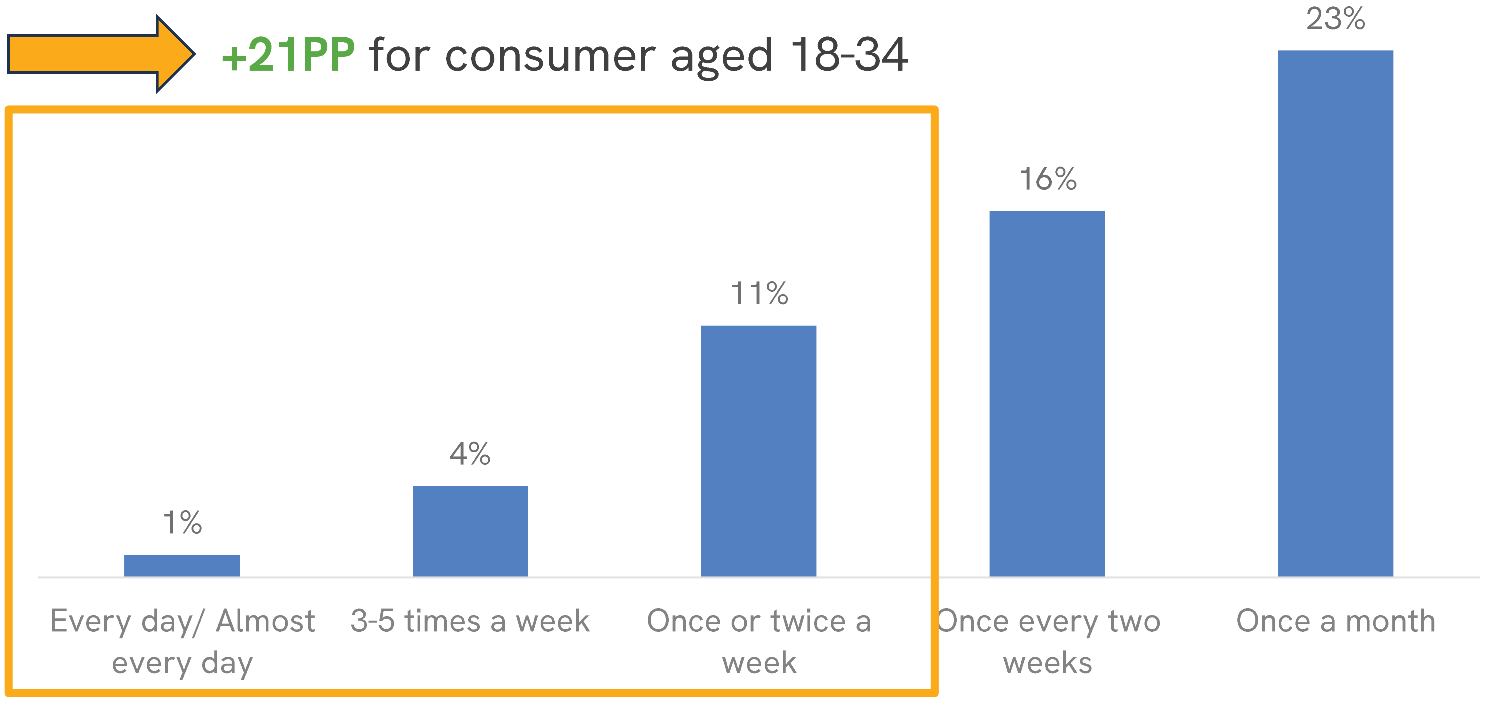
New Segment: Delivery Consumption

HOW OFTEN HAVE YOU ORDERED DELIVERY / TAKE AWAY IN THE PAST MONTH? (EX. DELIVEROO, UBER EATS)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 1001

HOW OFTEN HAVE YOU ORDERED DELIVERY / TAKE AWAY IN THE PAST MONTH? (EX. DELIVEROO, UBER EATS)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 259, 1001

YOU HAVE SAID YOU HAVE ORDERED DELIVERY IN THE PAST MONTH, HOW MUCH DO YOU USUALLY SPEND ON DELIVERY EVERY MONTH?

59€

Average Spend on delivery a month for all consumers

	Consumers aged 18-34	Consumers aged 35-54	Consumers aged Ages: 55+
Average Spend on delivery a month	€64	63€	43€

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 547, 212, 206, 132

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Hot Topic: Sustainability

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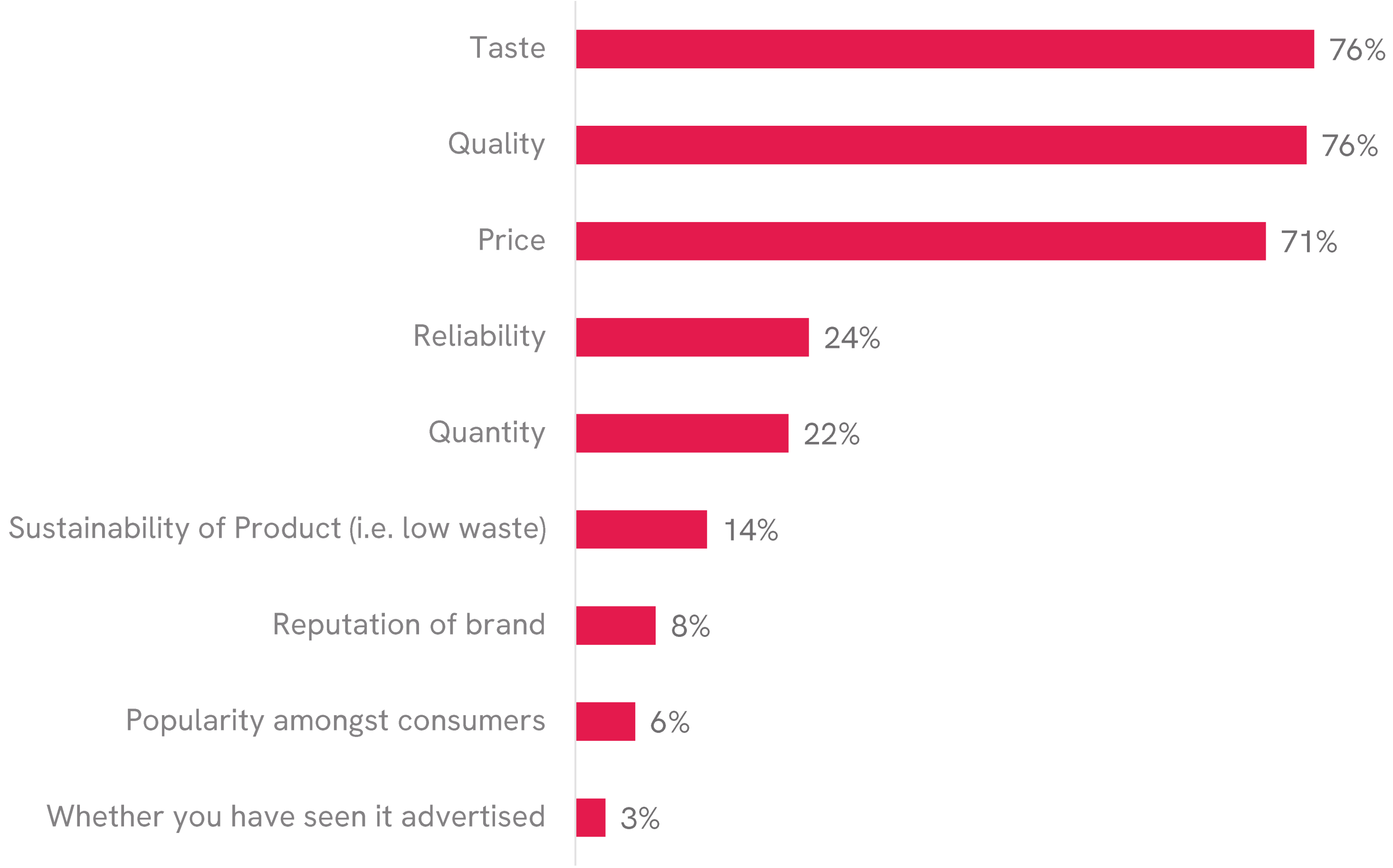
IN THE PRODUCTS THAT YOU PURCHASE IN BARS, RESTAURANTS AND SYMILAR VENUES, WHICH OF THE FOLLOWING ATTRIBUTES ARE IMPORTANT TO YOU?



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SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 757

WHAT ARE THE MOST IMPORTANT FACTORS TO YOU WHEN IT COMES TO SUSTAINABILITY AND ETHICAL PRACTICES?

41%	38%	37%	28%	24%	23%	14%
Local production	Low waste/pollution	Recycling	Ethical Sourcing	Traditional / Artisanal production	Renewable energy	Supporting Charities

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 1000

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IN A PRODUCT THAT YOU PURCHASE IN A BAR, RESTAURANT, AND OTHER SIMILAR VENUES, WHICH OF THE FOLLOWING SUSTAINABILITY FACTORS WOULD YOU BE WILLING TO PAY MORE FOR?

36%	26%	25%	21%	20%	18%	17%
Local production	Low waste/pollution	Recycling	Ethical Sourcing	Traditional / Artisanal production	Renewable energy	Supporting Charities

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 998

Hot Topic: Water Consumption in the On-Premise

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WHAT TYPE OF WATER DO YOU ORDER IN THE FOLLOWING RESTAURANTS YOU VISIT?

	Still	Sparkling	Both	Don't usually drink water
High End and Premium Venues	29%	39%	22%	10%
Low-end and Value Venues	23%	41%	15%	20%

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 367, 607

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HOW IMPORTANT IS IT TO HAVE A RANGE OF BRANDS OF BOTTLED WATER AVAILABLE WHEN OUT IN BARS, RESTAURANTS AND SYMILAR VENUES?

55%	30%	15%
Important	Neither Important Nor Unimportant	Unimportant

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 658

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YOU HAVE MENTIONED ORDERING WATER, WHAT TYPE OF WATER DO YOU ORDER IN THE FOLLOWING RESTAURANTS YOU VISIT?

	Bottled Water	Carafe
High End and Premium Venues	91%	20%
Low-end and Value Venues	87%	22%

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 328, 483

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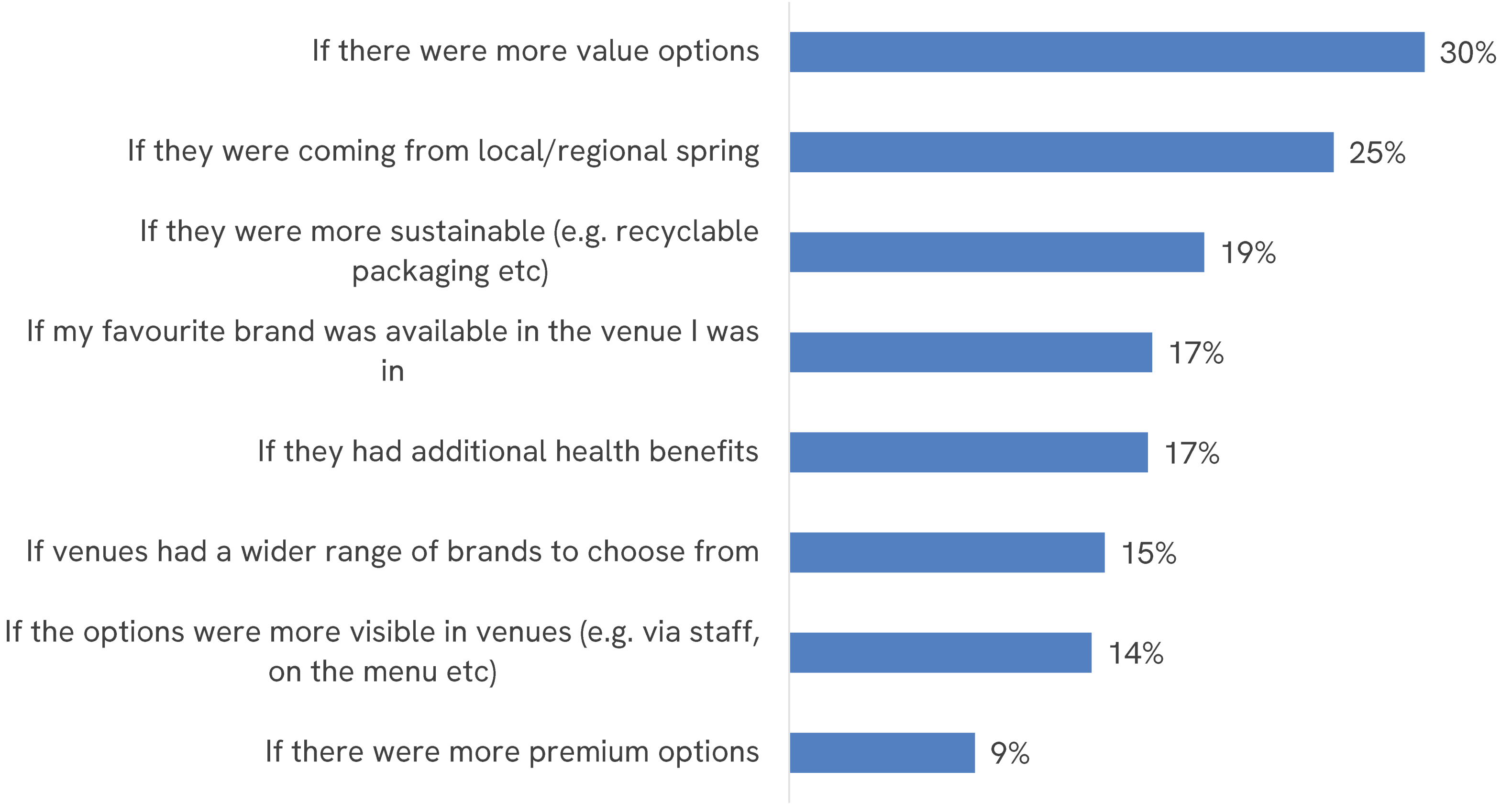
WHAT, IF ANYTHING WOULD ENCOURAGE YOU TO ORDER MORE BOTTLED WATER WHEN OUT IN BARS, RESTAURANTS AND OTHER SIMILAR VENUES?

28%

Have stated nothing would encourage them more to order bottled water



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 995

Hot Topic:

Germany Euros 2024

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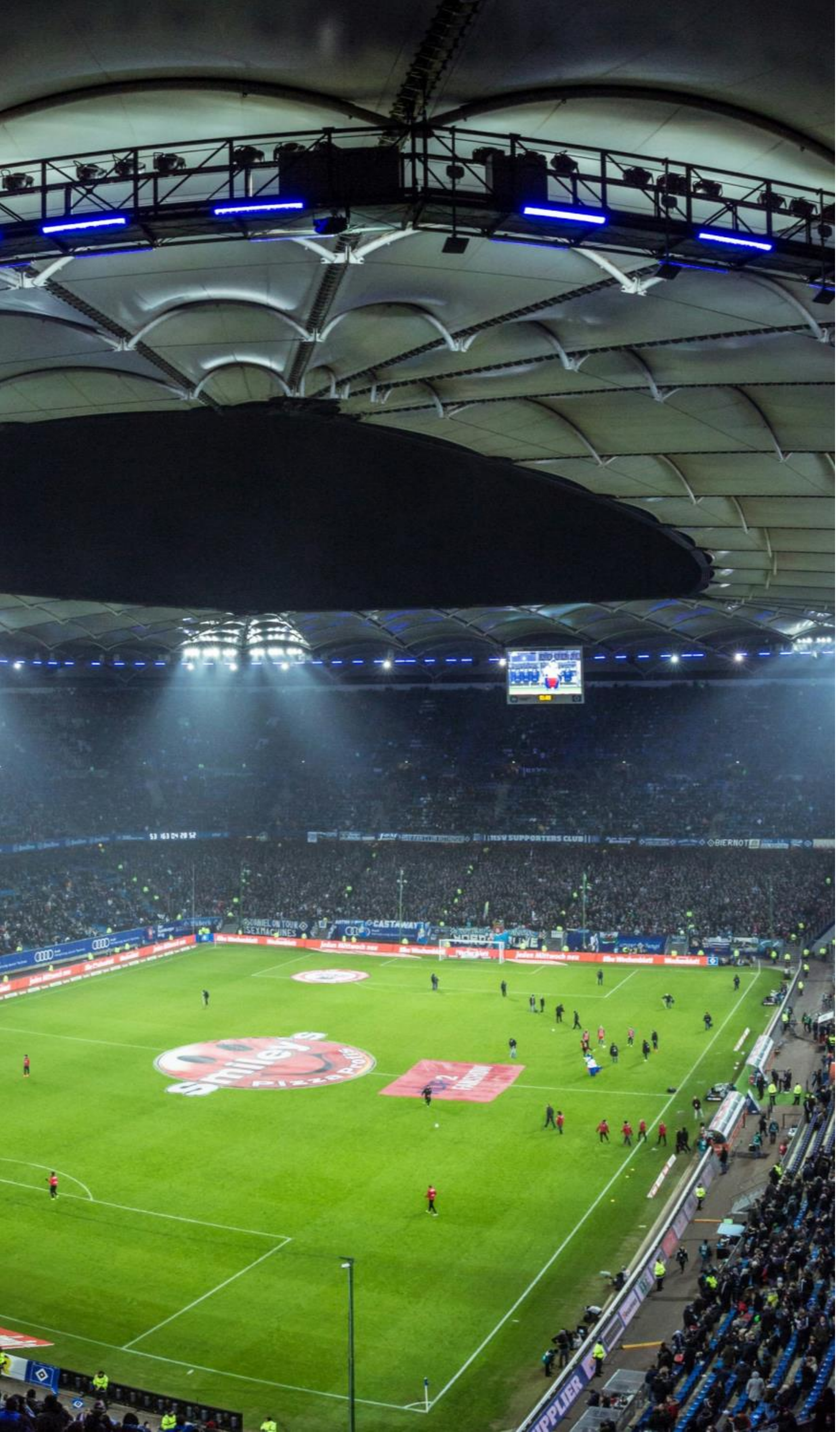

ARE YOU PLANNING ON WATCHING THE EUROS 2024 WHICH GERMANY IS HOSTING THIS YEAR?

70%	15%	7%
Yes	I have not decided yet	No

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 1333

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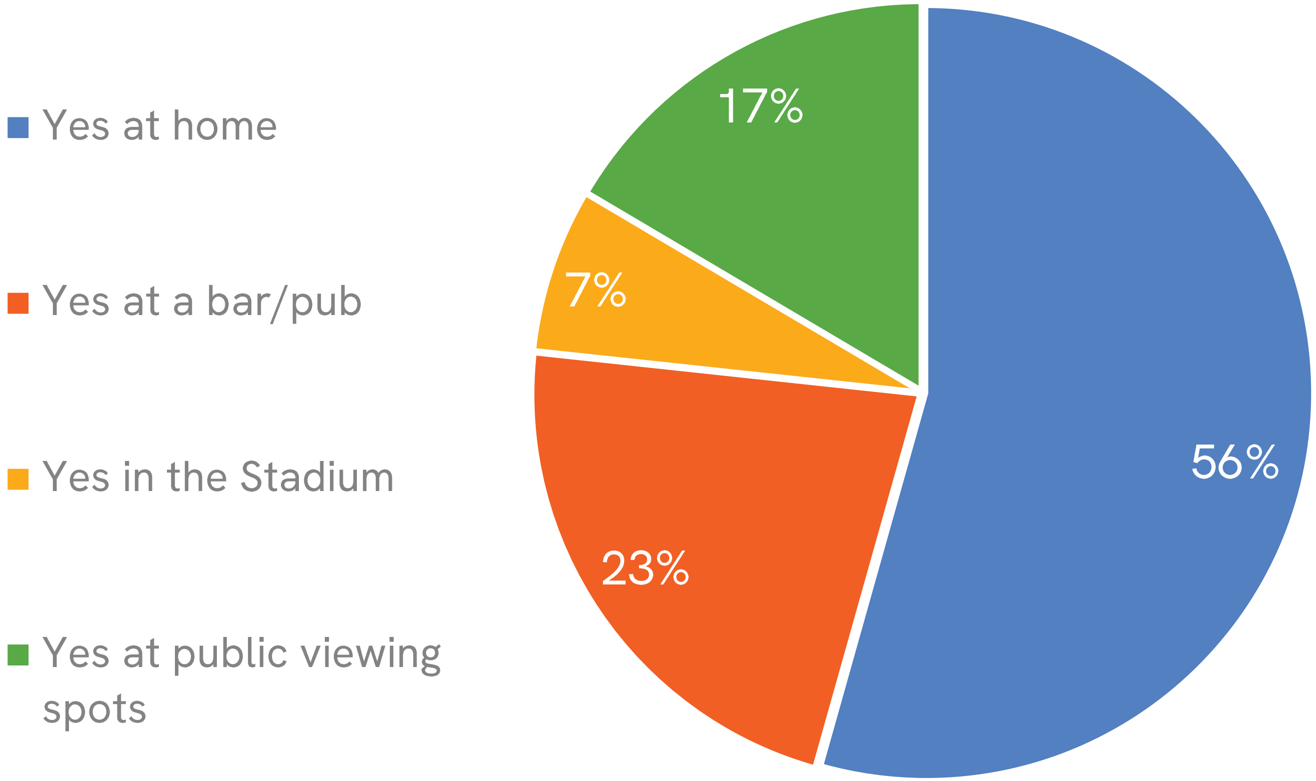
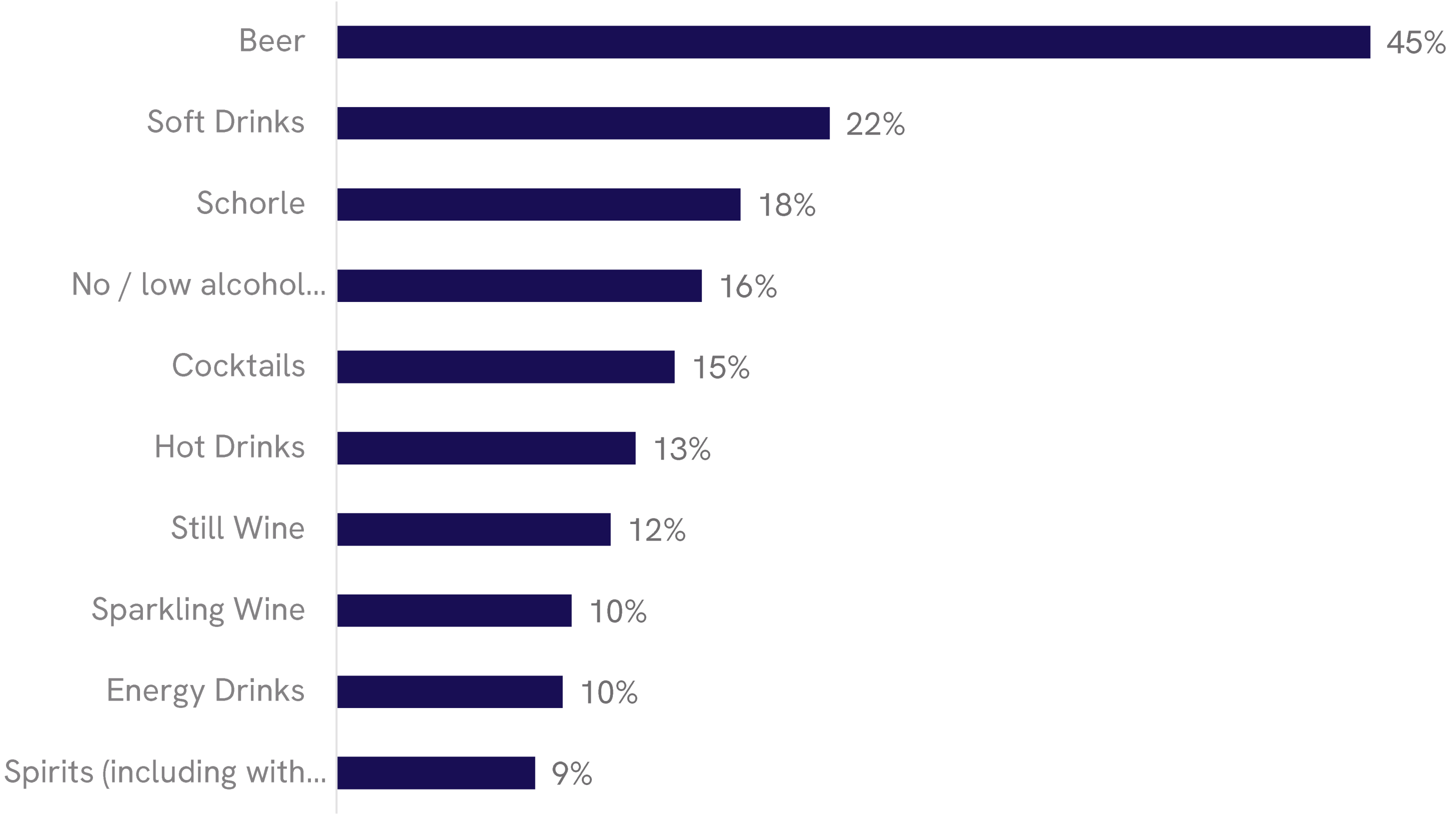
ARE YOU PLANNING ON WATCHING THE EURO 2024 IN ANY OF THE FOLLOWING PLACES?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 1001

WHAT DO YOU PLAN ON DRINKING WHEN WATCHING THE EURO 2024 IN BARS, RESTAURANTS OR OTHER SYMILAR VENUES?

Top 10 drinks consumers would drink when watching the Euros



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SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MARCH 2024 – SAMPLE: 1001

Optimise your On Premise channel strategy with CGA's On Premise User Survey

Identify which channels to target with digital advertisements and solutions

Understand the biggest factors influencing drink choice across key On Premise channels

OPUS

Build sales stories for your brands to demonstrate the benefits of prioritising your brands to operators

CGA Powered by NIQ

Global Bartender Reports

Market-specific insights based on a robust sample of 150 bartenders per country

- Understand the market nuances and the needs of hospitality professionals at a market level by purchasing country-specific Bartender Report
- Market-level reports are available for all countries included in the study and provide a rich insight into how to win with hospitality professionals, how to drive advocacy and the trends impacting specific countries

What you will receive

- *An in-depth report providing market level findings and recommendations allowing you to build relationships with this crucial audience, delivered in local language*
- *A virtual presentation of findings, delivered by CGA experts*

Investment

UK - $17,748	USA - $22,185	France - $16,417
South Korea - $17,526	Italy - $16,417	Mexico - $19,523
Germany - $19,967	Australia - $17,525	Canada - $17,748
Spain - $16,417		

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.

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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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Click here to receive latest and exclusive insights from Germany On Premise directly to your inbox

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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.