GERMANY ON PREMISE CONSUMER PULSE REPORT

CGA by NIQ, May 2024

SUMMARY: TOPLINE VISITATION & INTENTION

- Despite a decrease in drink led visits last month, consumers are going out more in May. Furthermore, 32% of consumers have stated going out less to the On Premise, 2 percentage points below last month's decrease in visitation rate.
- On the other hand consumers continue to increase the amount they spend on the On Premise, mostly due to higher-prices for eating and drinking out.
- The rate of delivery ordered also has seen a decrease with less consumers ordering compared to last month.
- When ordering drinks in a bar, café or restaurant consumers are mainly swayed by whether what they typically drink is available, how their drink of choice matches the food ordered and what their friends are drinking.
- Menus are also determinant of drink choice if it stands out on the menu, implying that there is a particular group of consumers more responsive to visual aids.
- Consumers mostly discover new drinks through the physical menu as well as though friends and family recommendations.
- When it comes to RTDs, 30% of consumers have purchased them in the past 6 months and a further 36% are open to try it. Over 2 in 5 consumers who drink RTDs like to experiment new RTD brands and flavours highlighting the space for innovative recipes.
- Pre-mixed Cocktails and Spirits and mixers are the most drunk RTDs. Despite the popularity of Alcopops, German consumers are planning to reduce consumption by 12 percentage points. RTDs are often purchased in supermarkets though there is opportunity in the On Premise, particularly for pre-mixed Cocktails.

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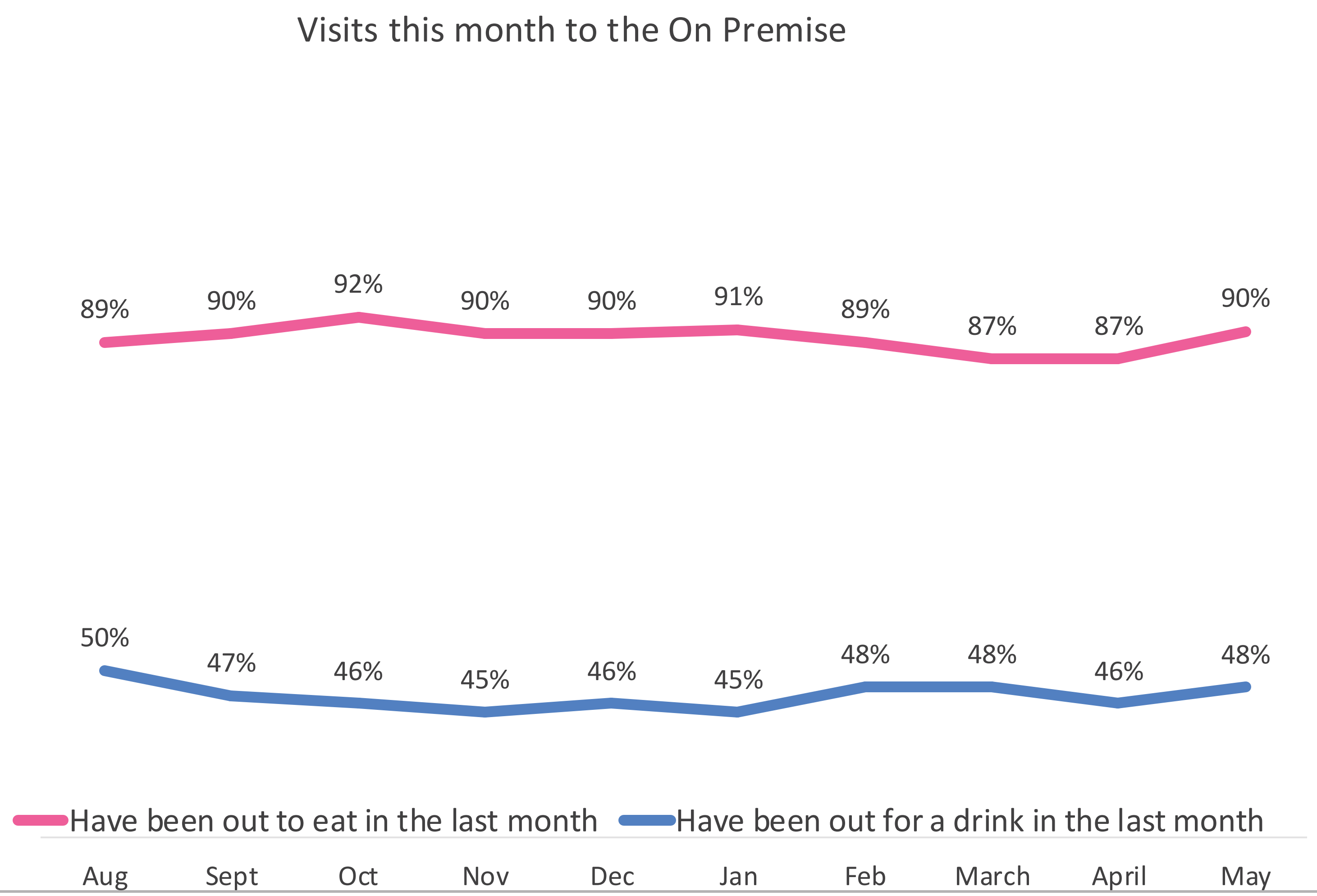
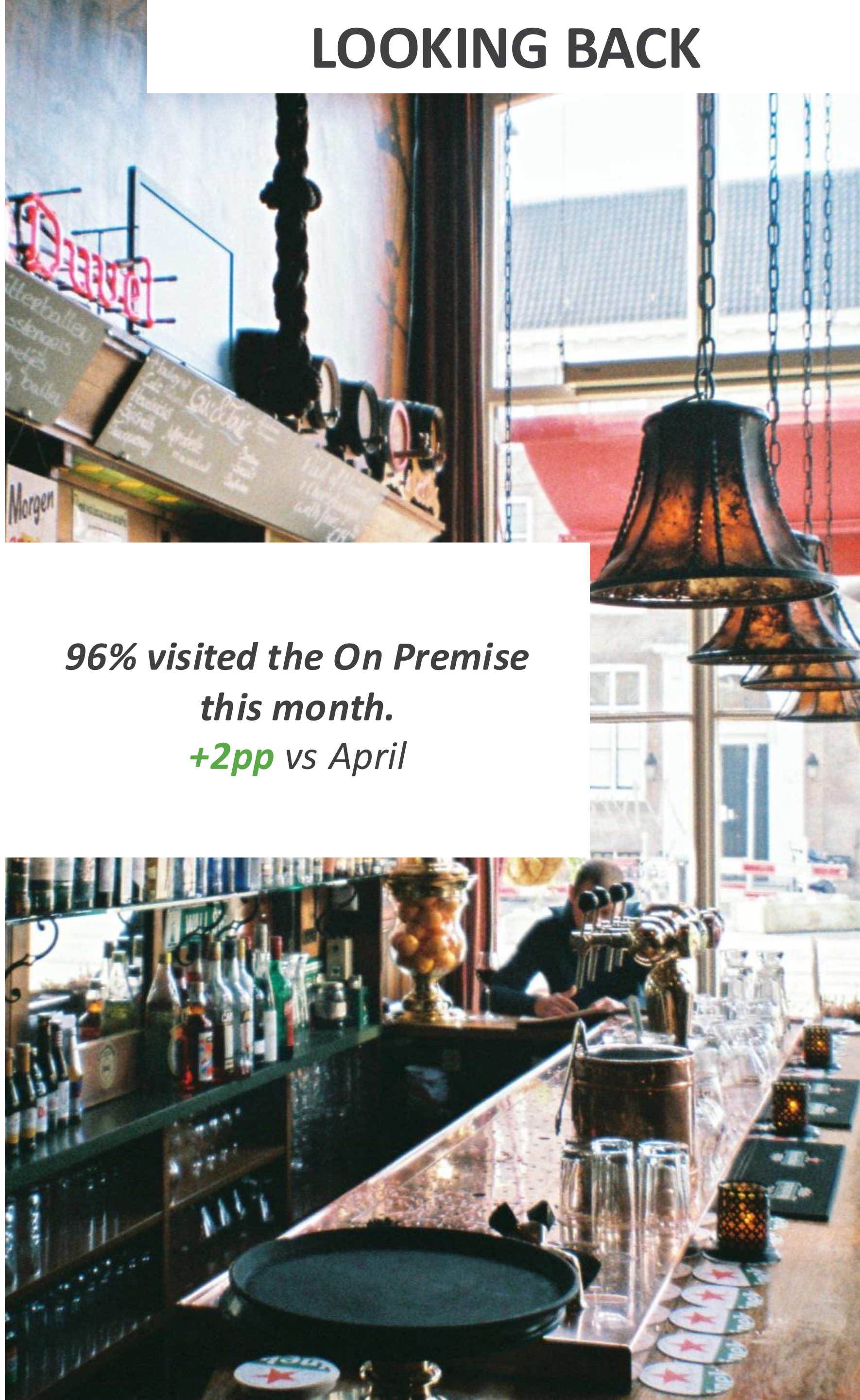
CGA'S MONTHLY CONSUMER PULSE

- This monthly On-Premise Consumer Pulse report is intended to capture consumers consumption patterns and how they fluctuate in the transition period from April 2024 to May 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 **May 2024** issue, we surveyed 1003 consumers (aged 18+) between the 24th – 30th May 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 **changes in beverage trendiness** as well as the consumption of **RTDs.**

KEY METRICS / ON PREMISE VISITATION

VISITATION IN THE ON PREMISE OVER THE PAST MONTH





96% visited the On Premise this month.

***+2pp** vs April*

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 1003-1007

VISITATION PLANS FOR THE ON PREMISE MONTH AHEAD

85%

Plan to go out to eat in the next month

-1pp vs April

54%

Plan to go out to drink in the next month

+1pp vs April

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

=0pp vs April

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 1003 - 1007

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

Change in frequency of visitation

19%

Going out more often

+2pp vs April

49%

Going out the same

+1pp vs April

32%

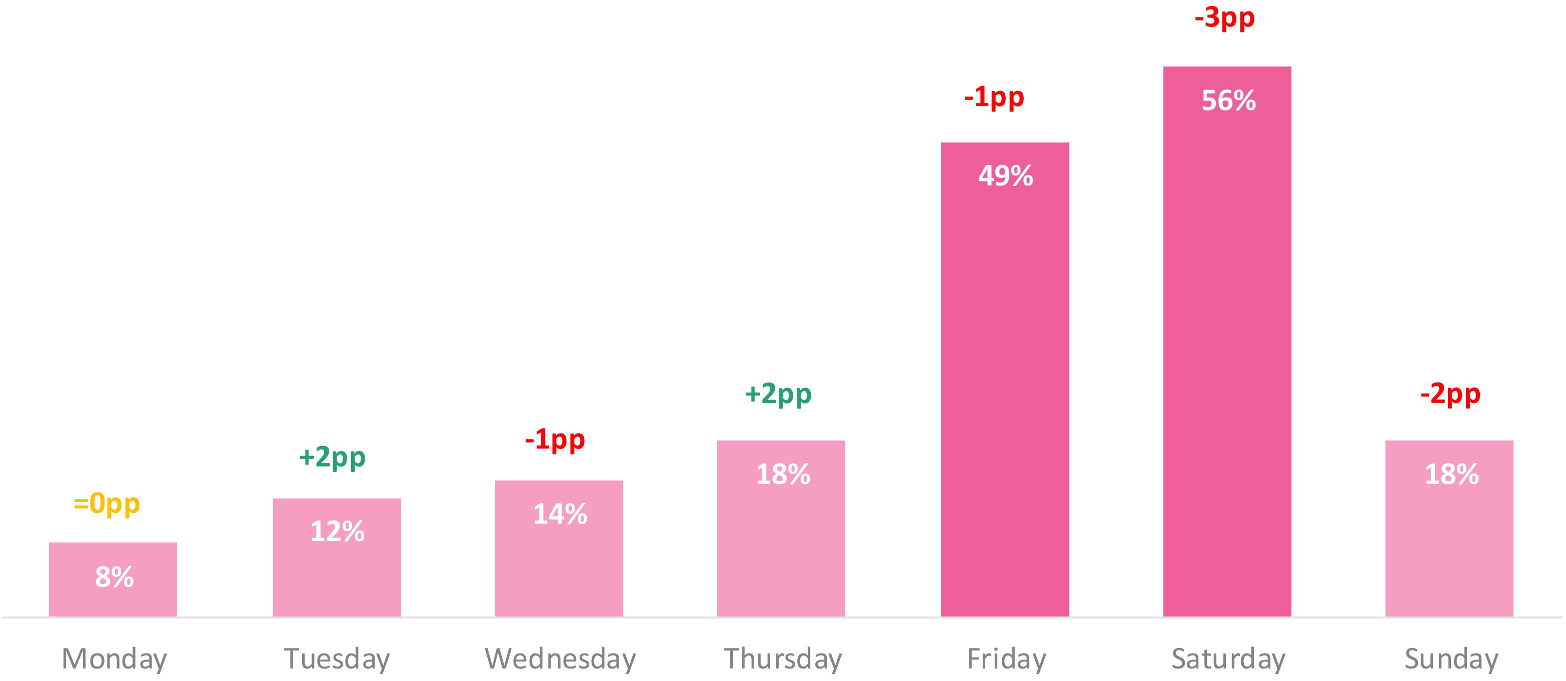
Going out less often

-2pp vs April

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 1003-1007

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

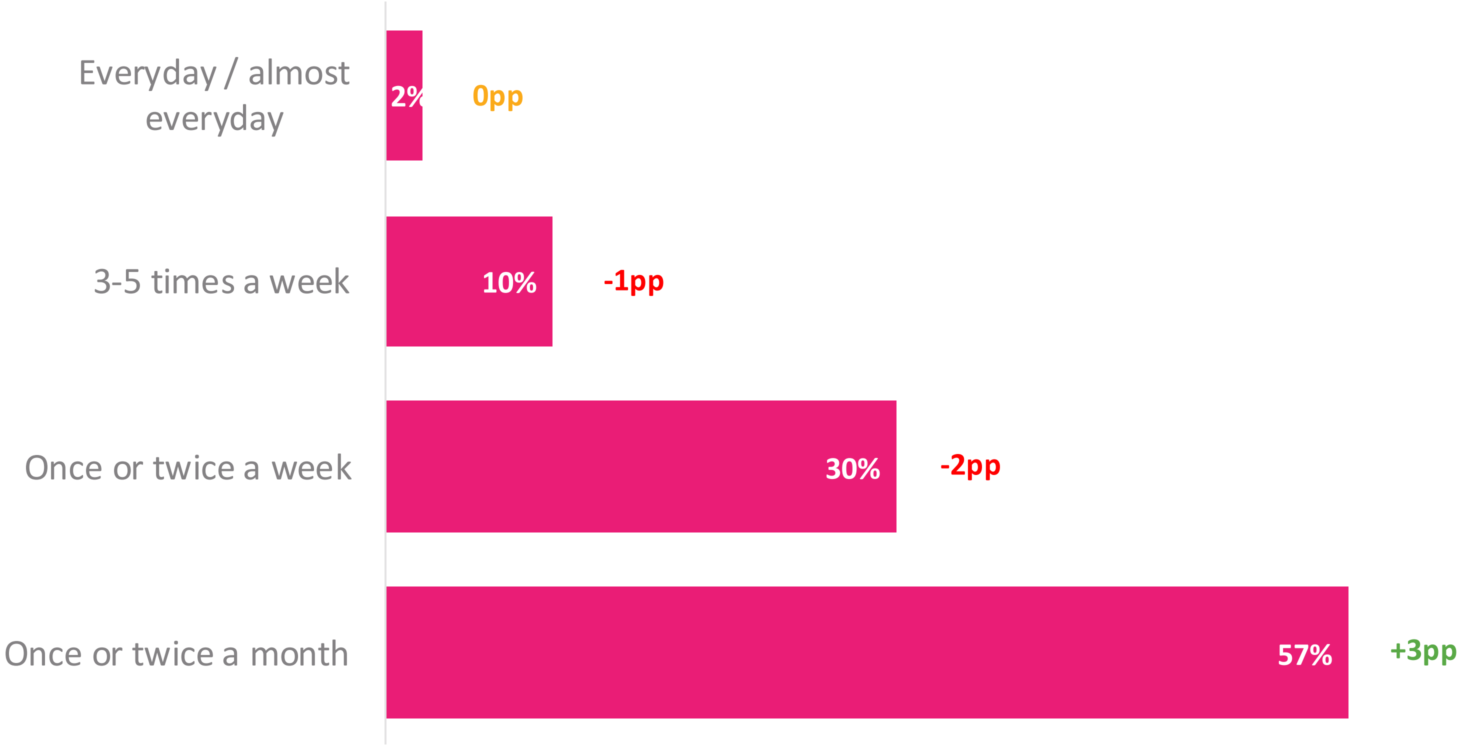
Days of the week visited (vs April)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 940-959

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

Visiting habits (vs April)

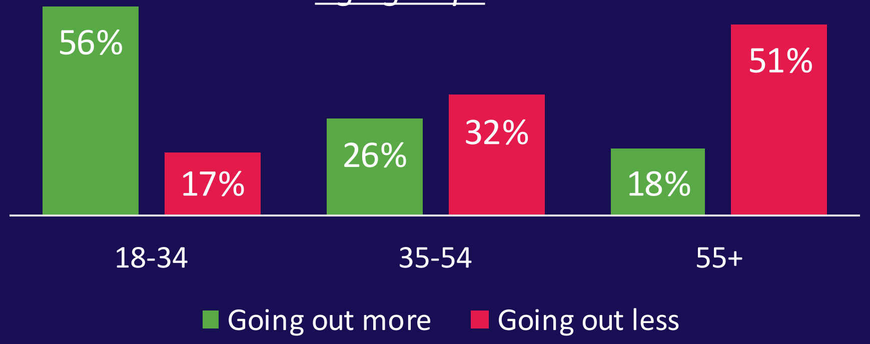


SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 940-959

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

	Going out more	Going out less
♂	52%	41%
♀	48%	59%

Location of residence

	Going out more	Going out less
City centre / town centre	62%	45%
Rural / suburban	38%	55%

Average household income

Going out more	Going out less
€46,691	€40,880

Typically visits the On Premise…

	Going out more	Going out less
At least weekly	68%	15%
At least monthly	26%	48%

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SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 188, 327

44%

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

+25pp vs average consumer

38%

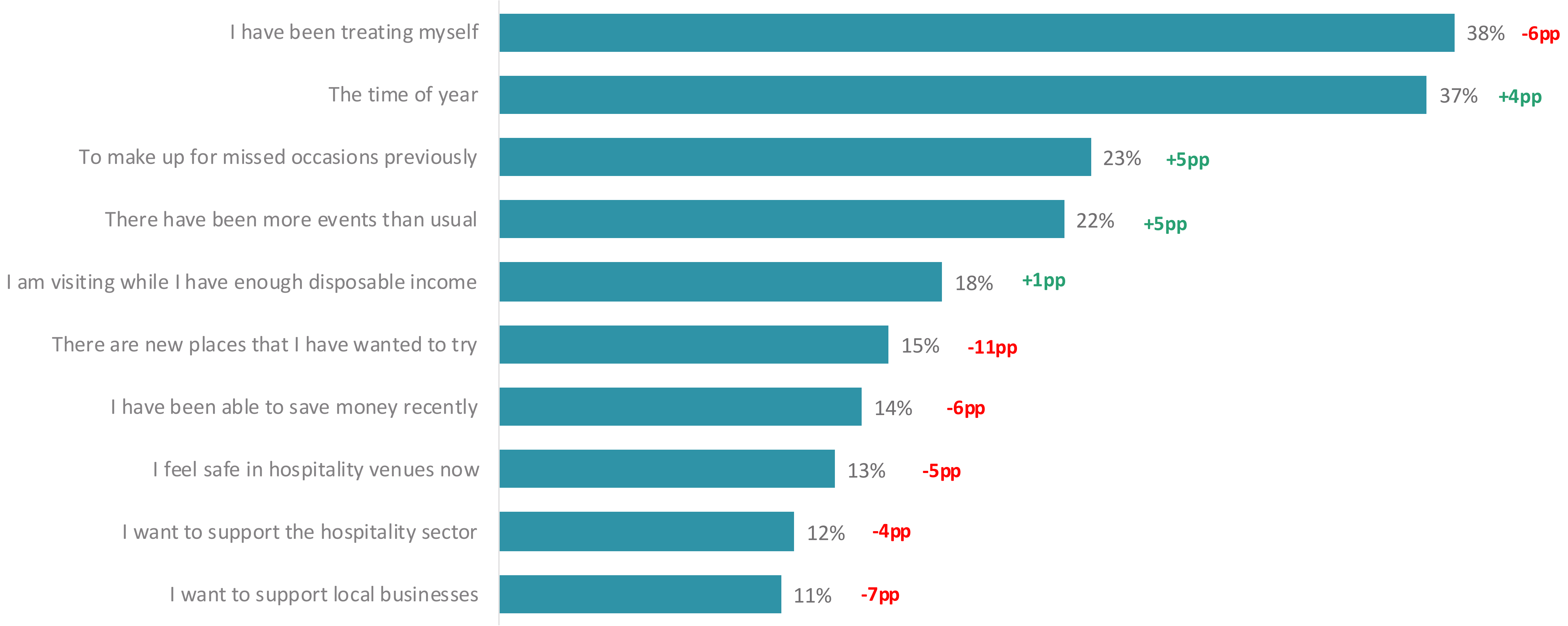
Of Gen Z are spending more overall on eating and drinking out this month

+8pp vs average consumer

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 167 - 1003

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

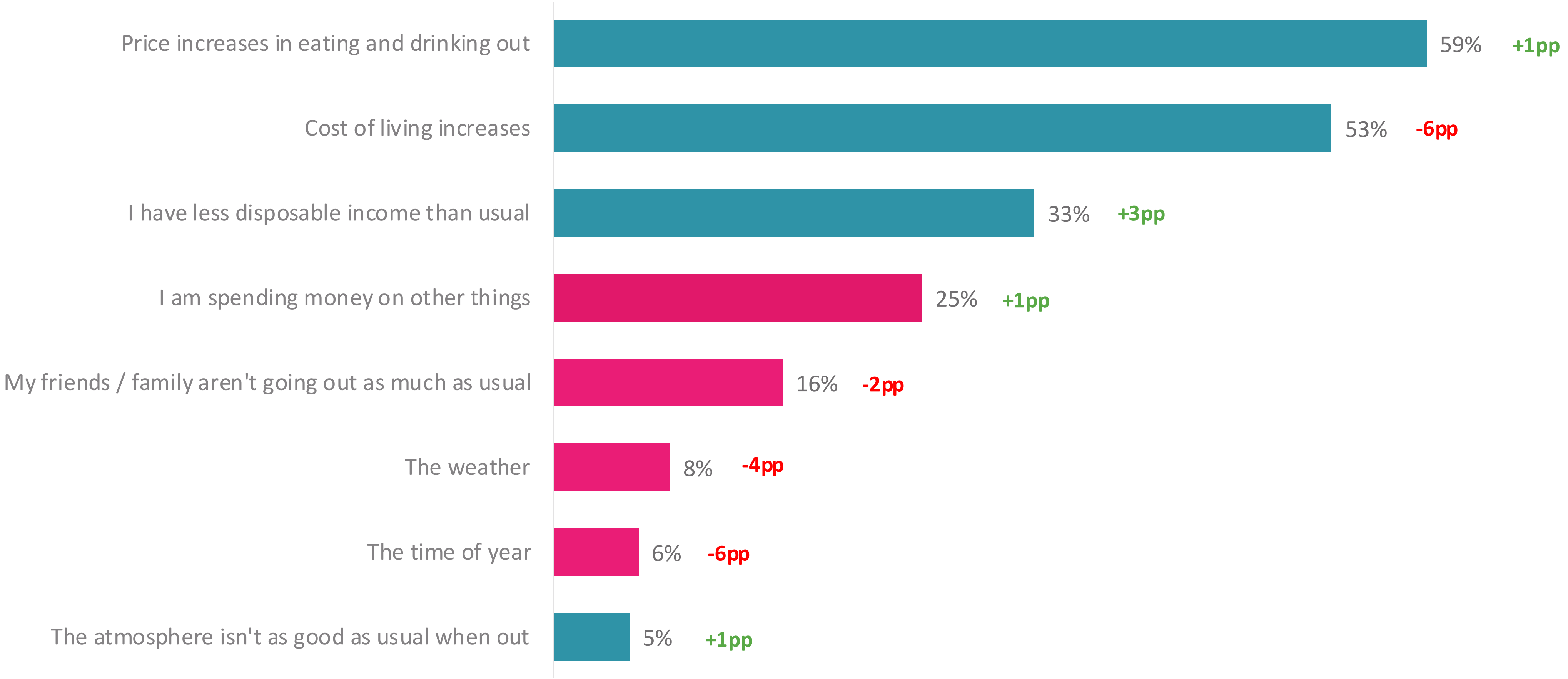
Reasons for going out to the on premise more frequently than usual (vs April)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 172-188

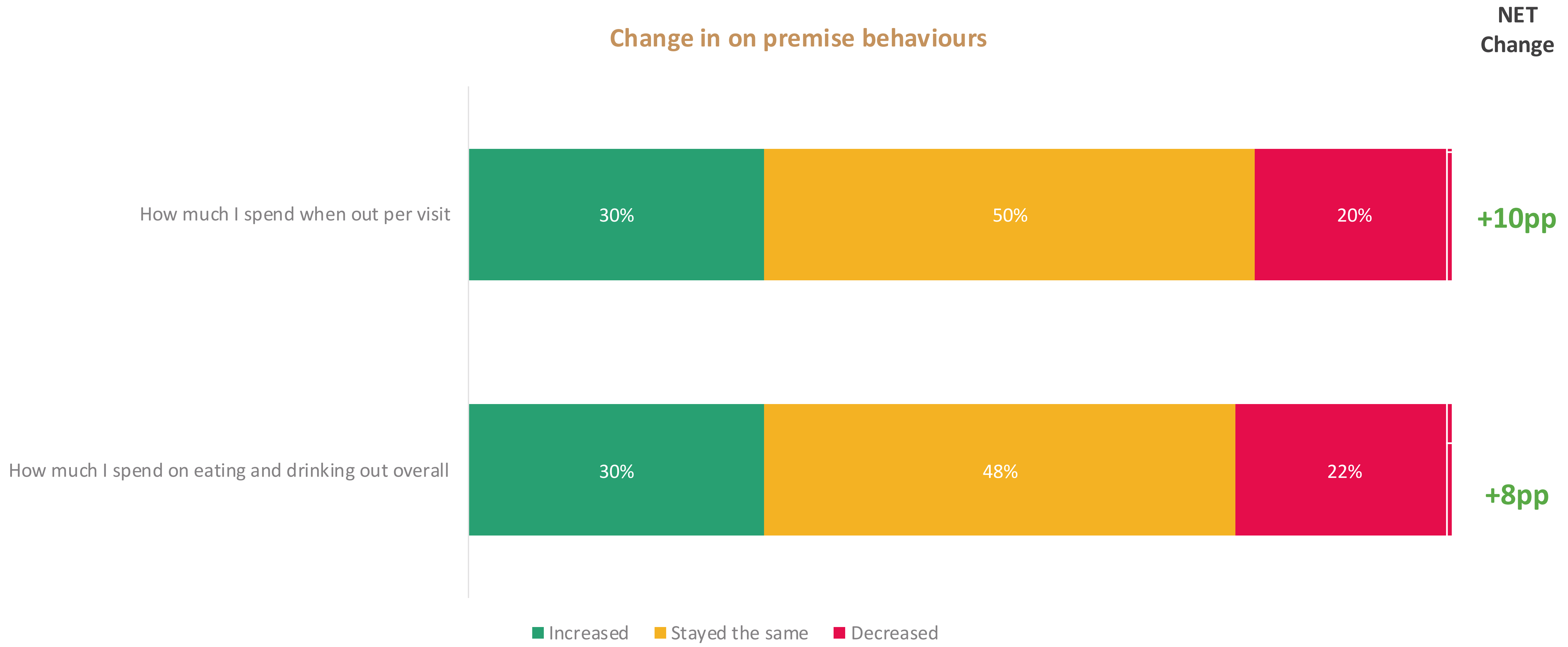
YOU SAID THAT YOU ARE CURRENTLY GOING OUT LESS FREQUENTLY THAN USUAL, WHY IS THIS?

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



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 172-327

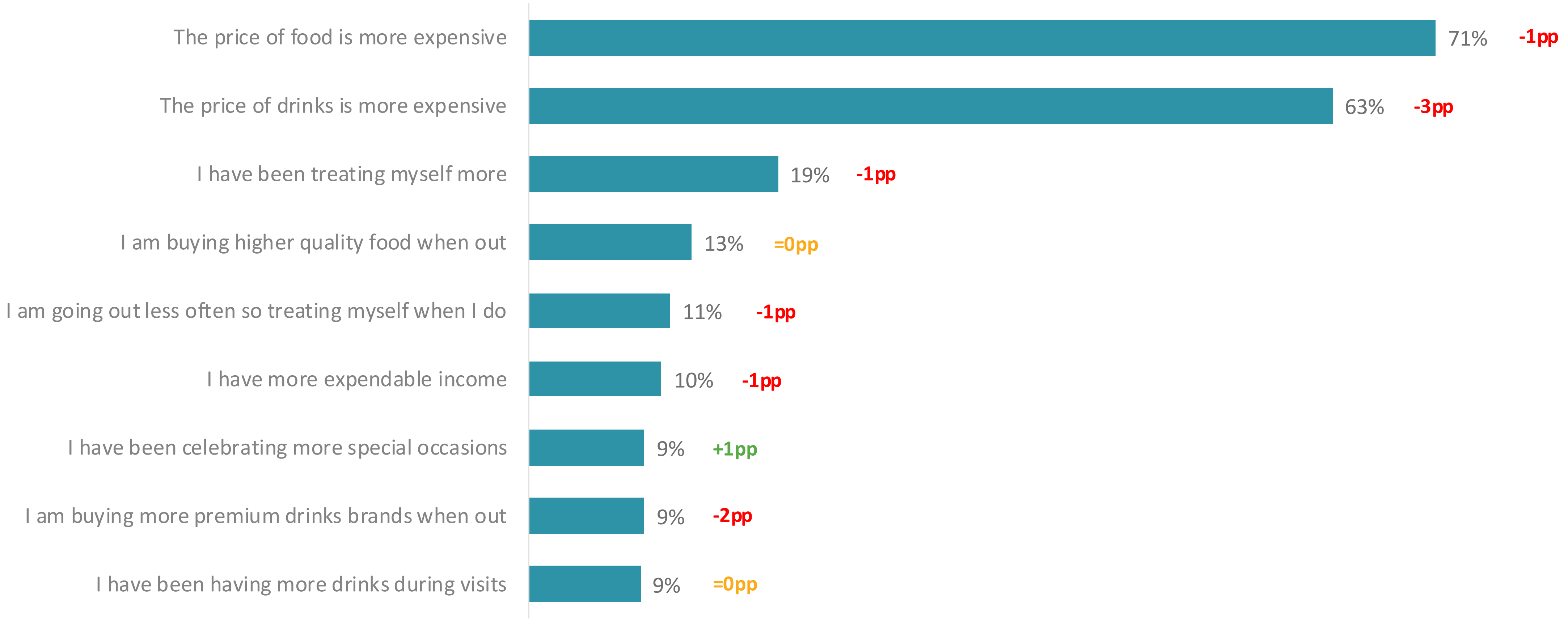
HAVE YOU CHANGED YOUR BEHAVIOUR IN ANY OF THE FOLLOWING WAYS OVER THE PAST MONTH, COMPARED TO USUAL, IN BARS, RESTAURANTS AND SIMILAR VENUES?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 1003

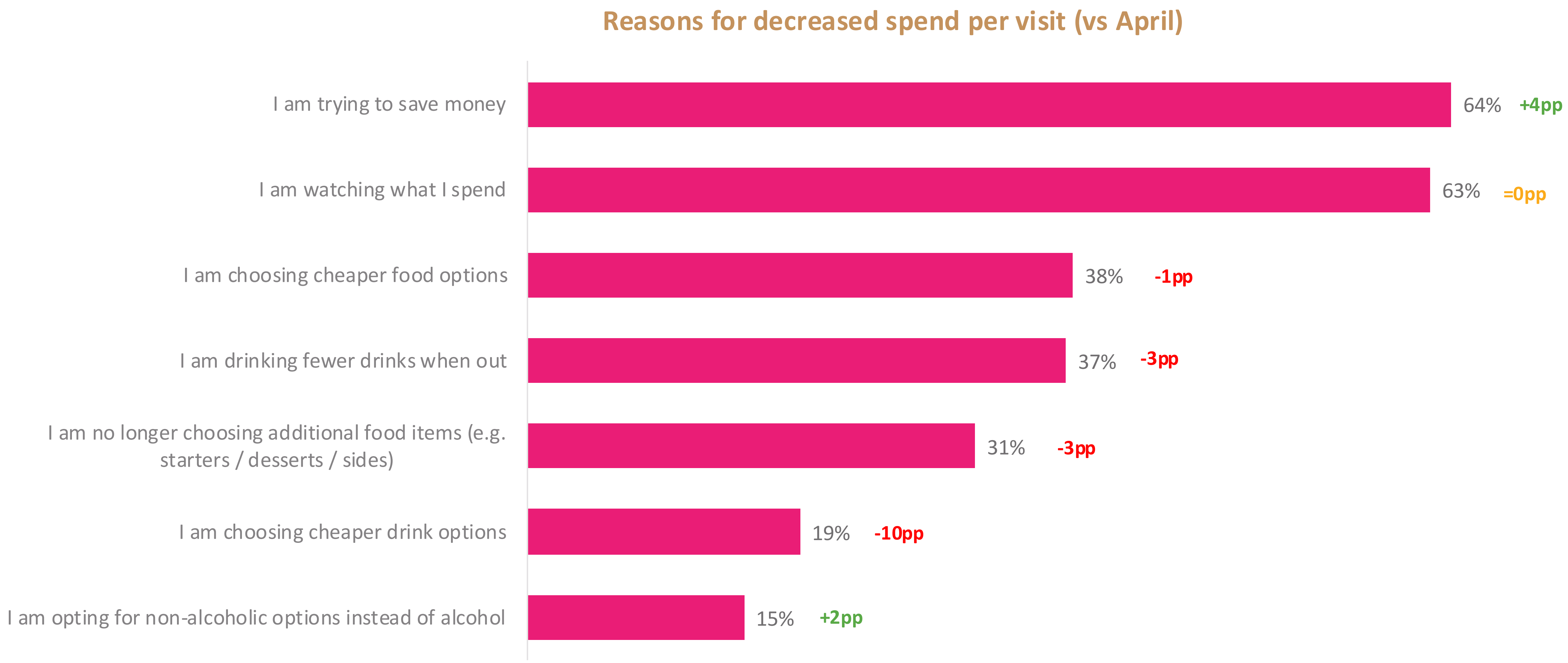
WHICH IF ANY OF THE FOLLOWING ARE REASONS WHY YOU ARE SPENDING MORE NOW WHEN OUT PER VISIT IN BARS, RESTAURANTS AND SIMILAR VENUES?

Reasons for increased spend per visit (vs April)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 294-299

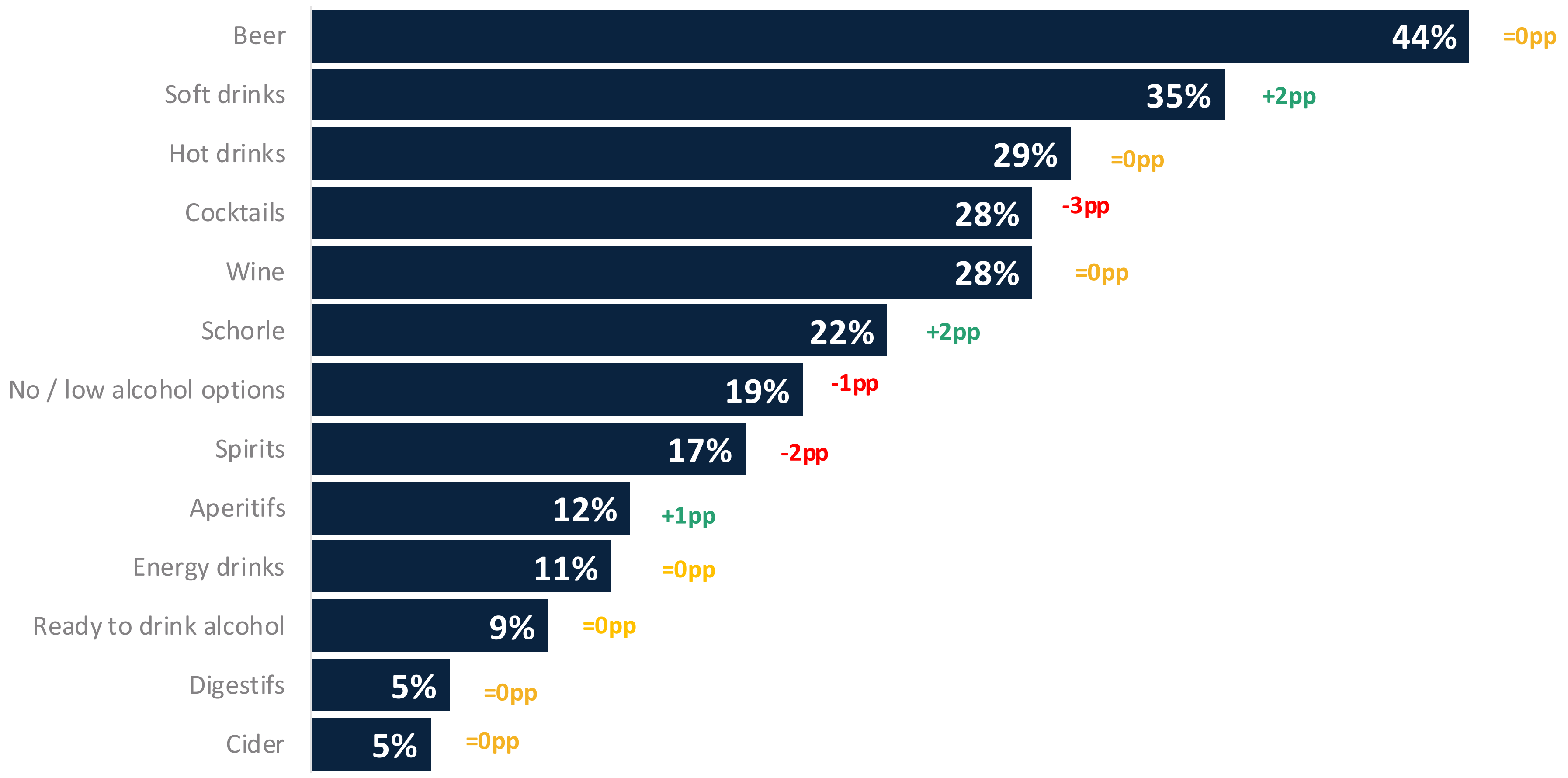
WHICH IF ANY OF THE FOLLOWING ARE REASONS WHY YOU ARE SPENDING LESS NOW WHEN OUT PER VISIT IN BARS, RESTAURANTS AND OTHER SIMILAR VENUES?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 206-221

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

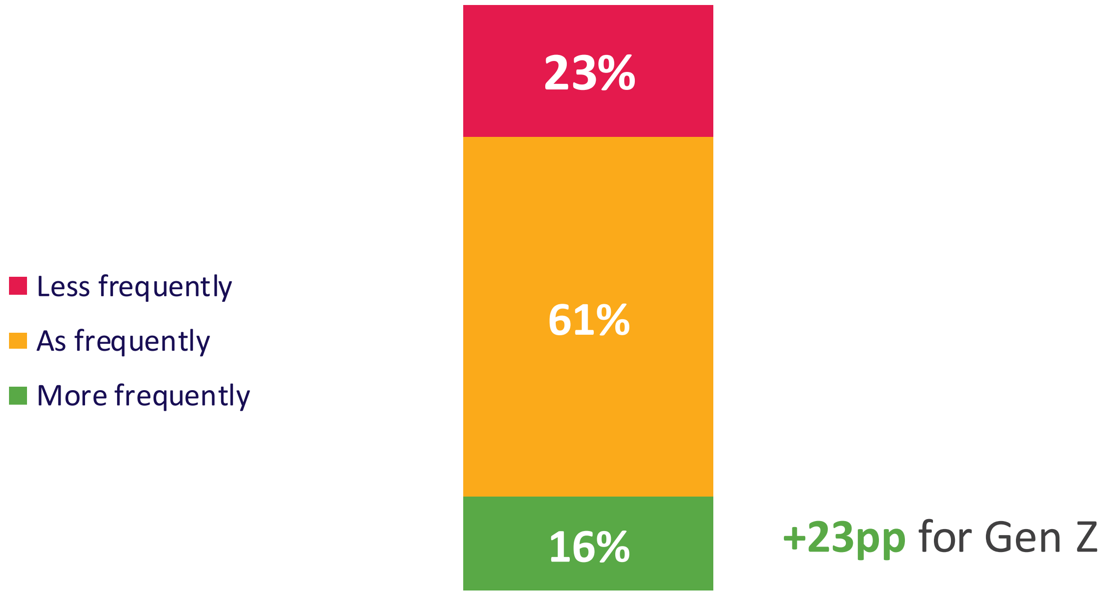
Drink choice of those who have visited the On Premise in the past month (vs April)



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 940- 959

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 MAY 2024 – SAMPLE: 1001,166

Tracking delivery consumption

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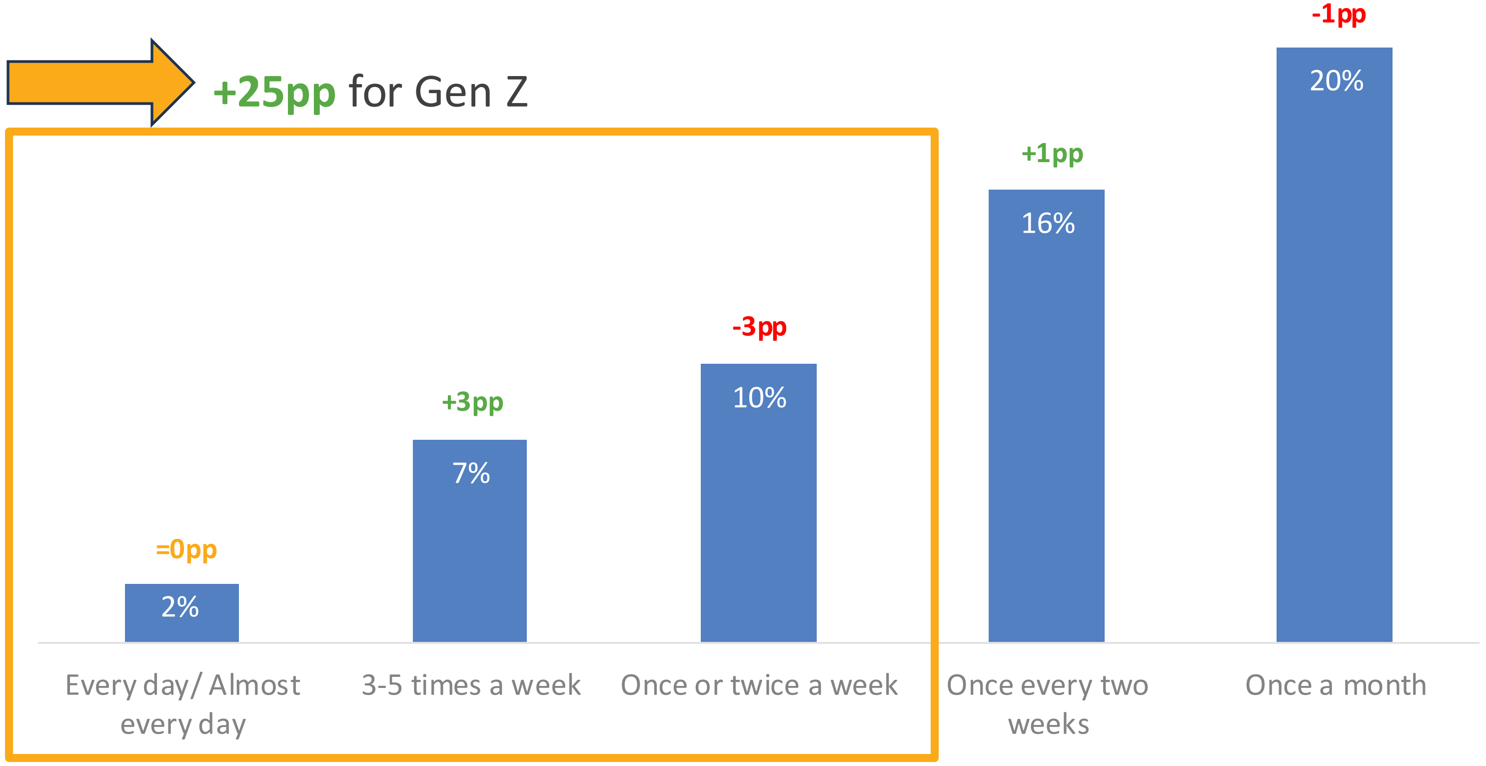
55%

Of Consumers have ordered delivery in the past month

=0pp vs April

23% Have not ordered delivery this month
23% Never order delivery

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



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 167-1007

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

63€

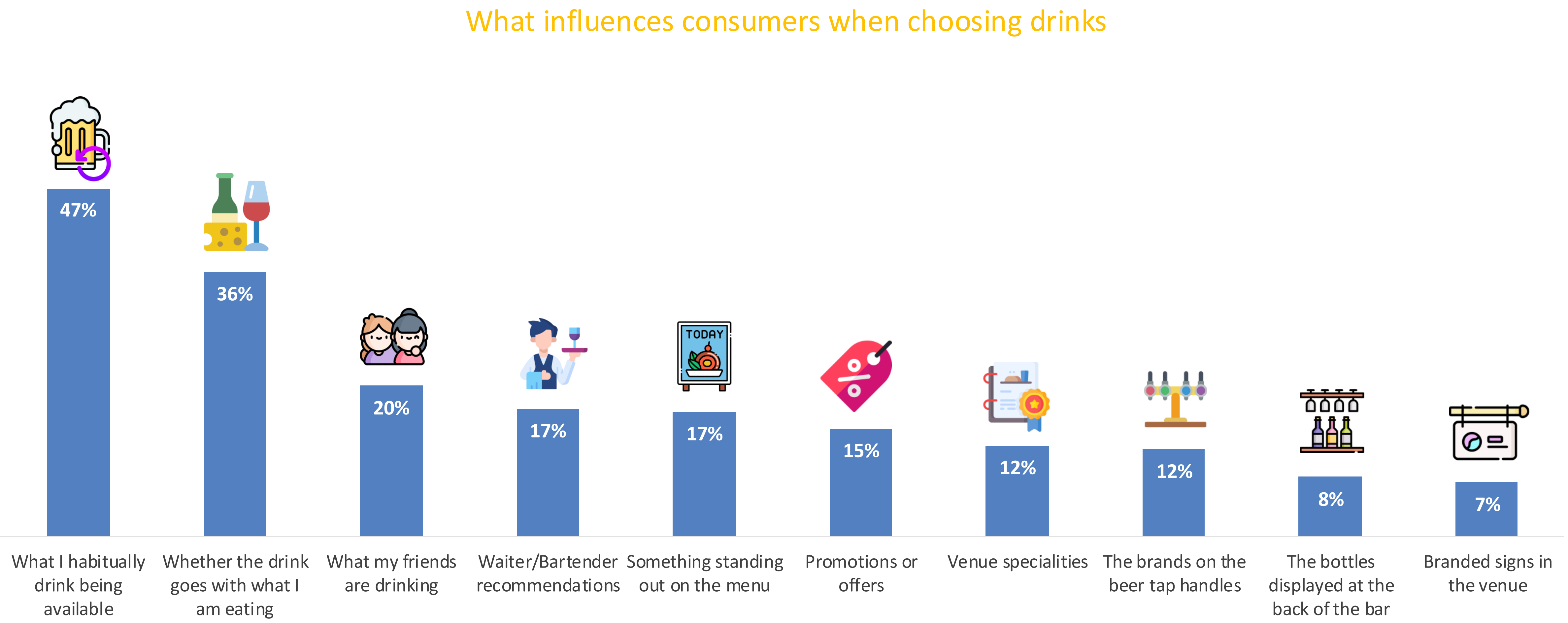
Average Spend on delivery a month for all consumers

	Consumers aged 18-34	Consumers aged 35-54	Consumers aged Ages: 55+
Average Spend on delivery a month	71€	63€	49€

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 404

Hot topic:
Path of Purchase

WHEN ORDERING DRINKS IN A BAR OR RESTAURANT WHICH OF THE FOLLOWING INFLUENCE WHAT DRINKS YOU ORDER?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 1003

WHICH OF THE FOLLOWING INFLUENCES YOUR DRINKS SELECTION THE MOST WHEN ORDERING DRINKS IN A BAR OR RESTAURANT?

What influences consumers the most when choosing drinks

33%	21%	8%	7%	5%
What I habitually drink being available	Whether the drink goes with what I am eating	What my friends are drinking	Something standing out on the menu	Waiter and Bartender recommendations

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 871

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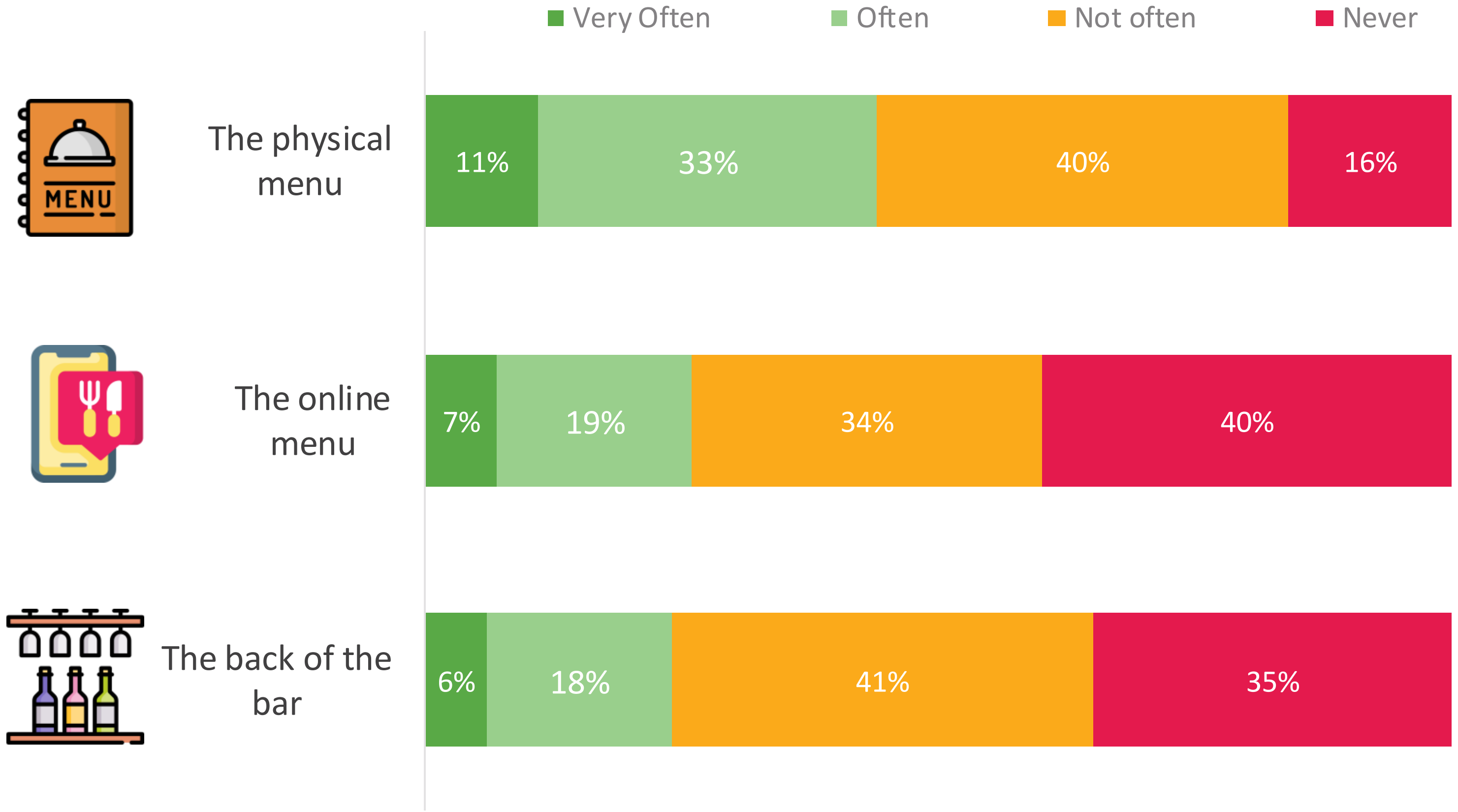
HOW OFTEN DO YOU ORDER NEW DRINKS YOU'VE NEVER TRIED BEFORE AFTER SEEING THEM ON...?

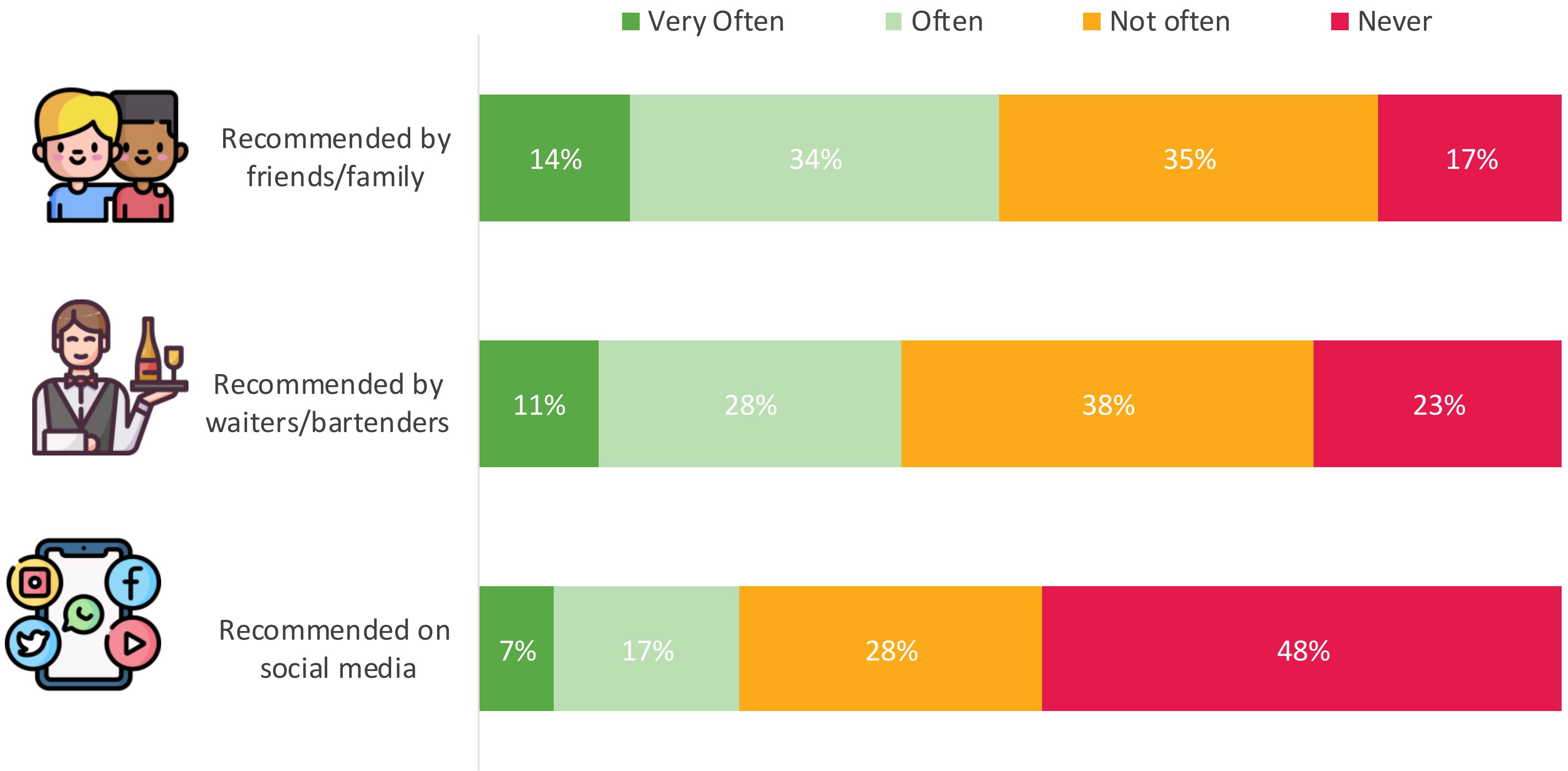
Visual prompts



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 986 - 995

HOW OFTEN DO YOU ORDER NEW DRINKS YOU'VE NEVER TRIED BEFORE AFTER HAVING THEM...?

Verbal prompts



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 995 - 998

Hot Topic:
RTDs

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HAVE YOU PURCHASED RTDS IN THE PAST 6 MONTHS?

RTD consumption over past 6 months

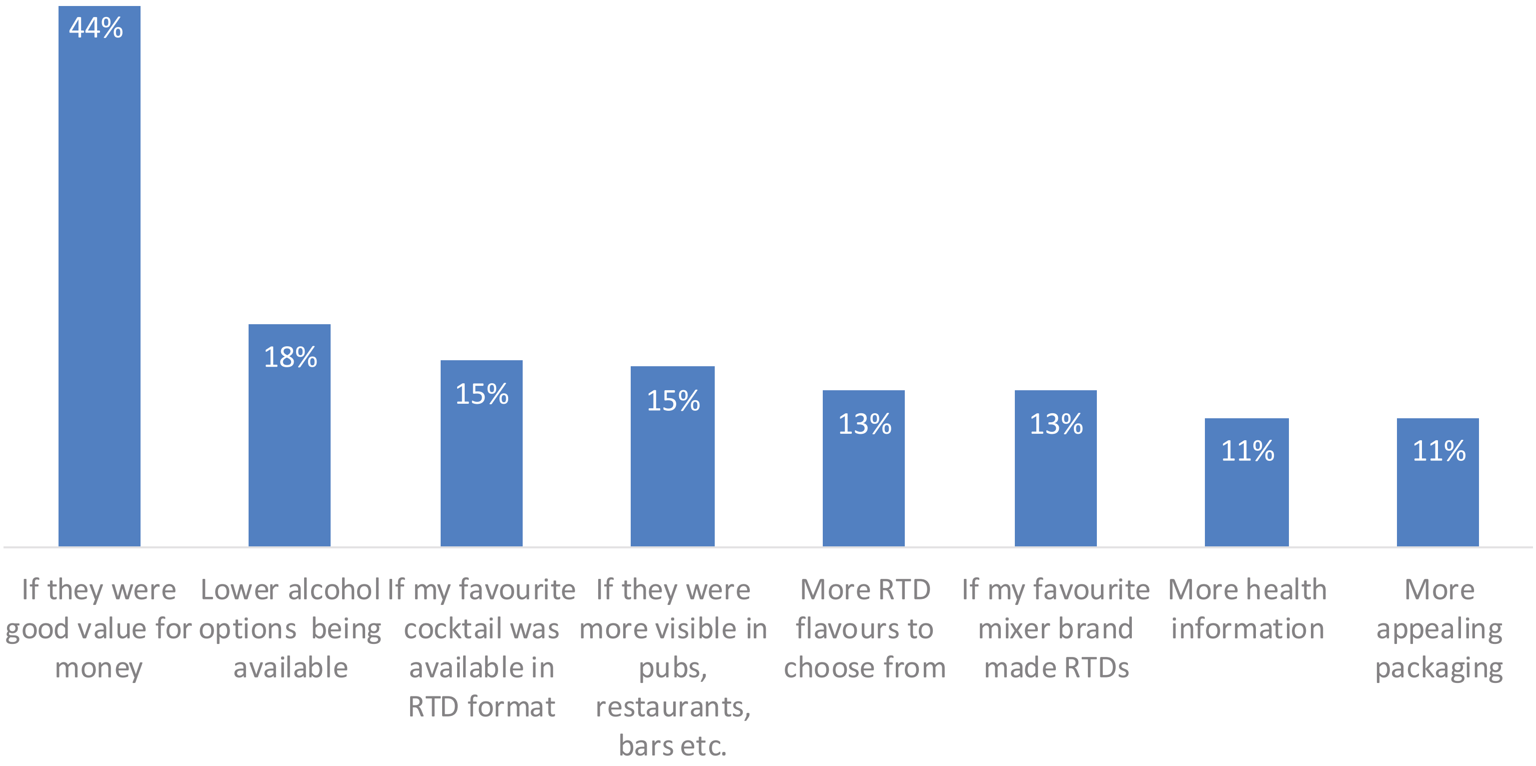
30%
Yes

36%
No, but I would be willing to try it

34%
No and I would not be willing to try it

SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 1003

WOULD ANY OF THE FOLLOWING ENCOURAGE YOU TO PURCHASE RTDS FOR THE FIRST TIME IN PUBS, BARS AND RESTAURANTS?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 365

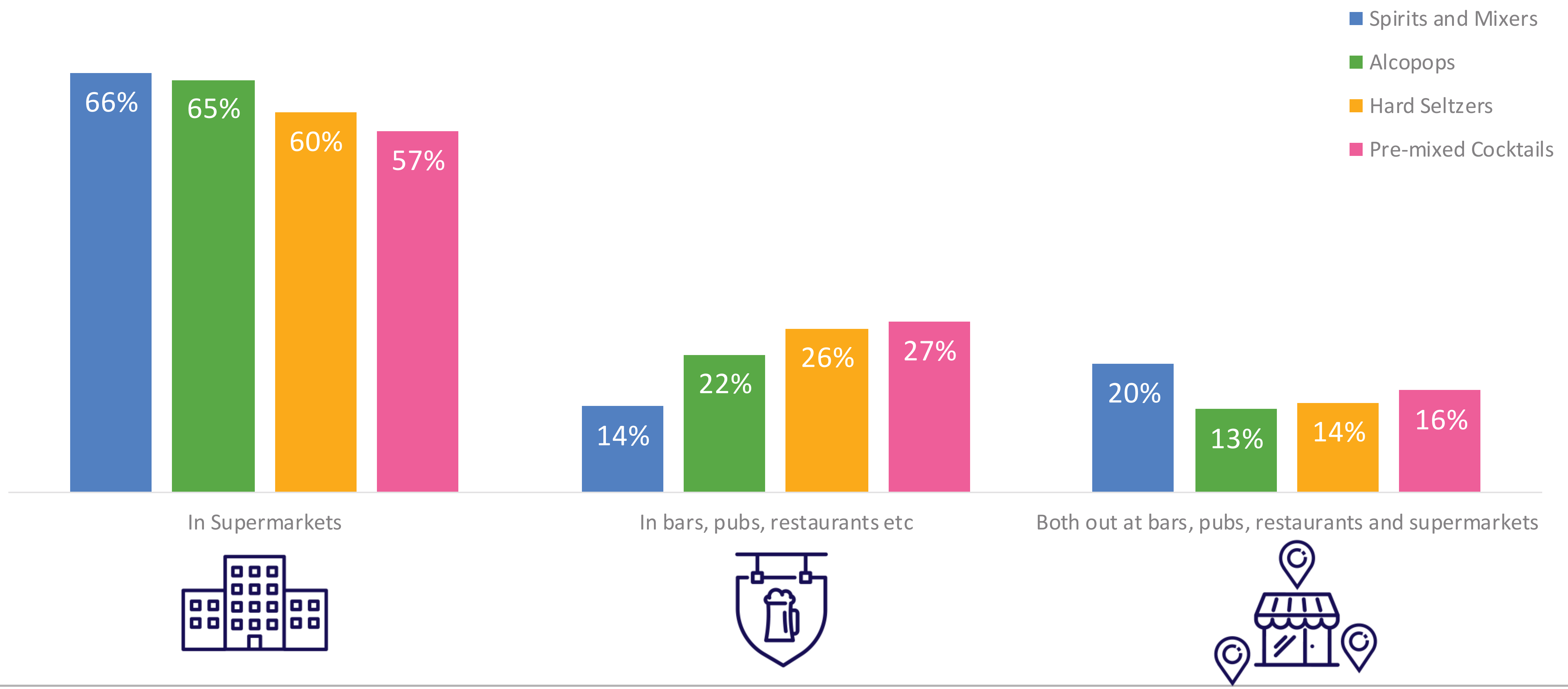
WHICH TYPE OF RTDS HAVE YOU PURCHASED IN THE PAST SIX MONTHS? PLEASE SELECT ALL THAT APPLY

Pre-mixed Cocktails	Spirits and mixers	Alcopops	Hard Seltzers
52%	50%	31%	28%

+12pp
vs consumers who consider purchasing in the future

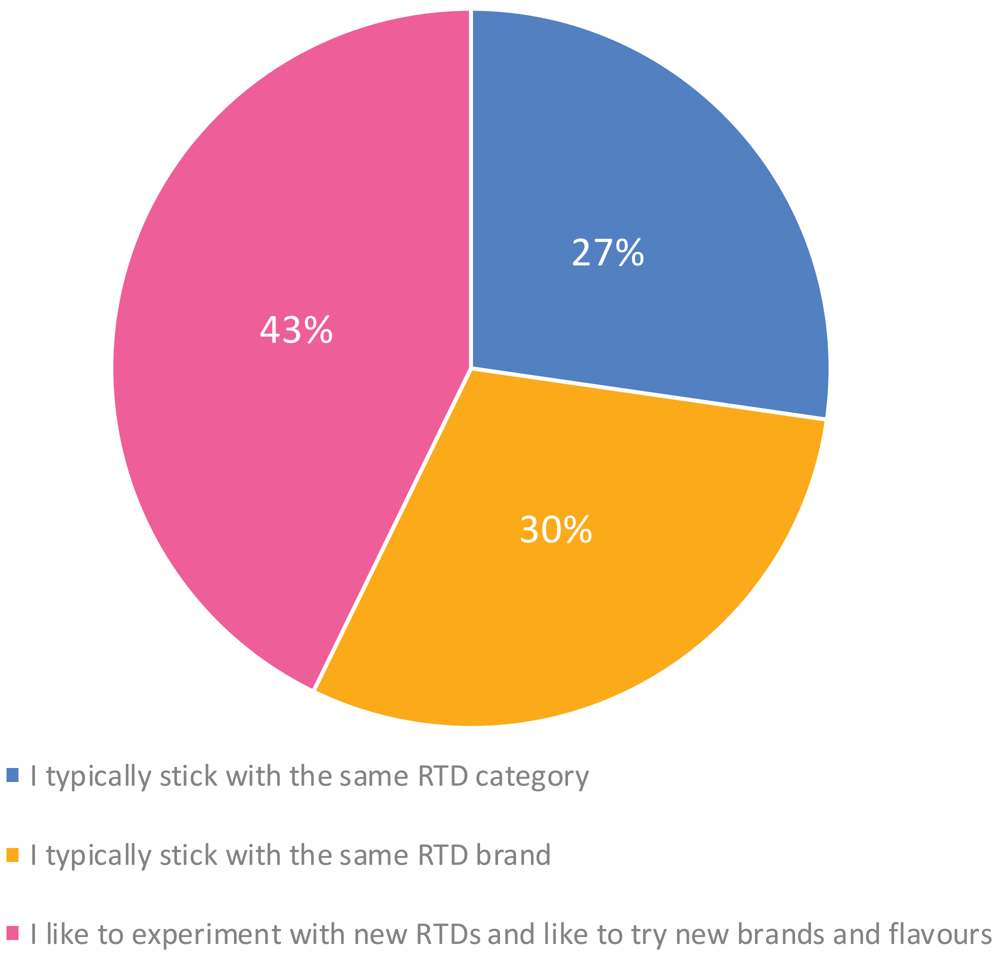
SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 301

WHERE HAVE YOU PREVIOUSLY PURCHASED RTDS?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 85 - 156

WHICH OF THE FOLLOWING STATEMENTS BEST APPLIES TO YOU?



SOURCE: CGA MONTHLY ON PREMISE CONSUMER PULSE REPORT MAY 2024 – SAMPLE: 299

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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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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:

BILAL KADDOURI

CLIENT SOLUTIONS DIRECTOR

Bilal.Kaddouri@nielseniq.com

MIRIAM STIRNIMANN

CLIENT SUCCESS & INSIGHT MANAGER

Miriam.Stirnimann@nielseniq.com

BETH LARMER

SENIOR CONSUMER RESEARCH EXECUTIVE

Beth.larmer@nielseniq.com

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

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