

A background image showing a group of people at a social gathering, holding and clinking glasses of refreshing drinks. The drinks are garnished with lime slices and fresh mint leaves. The scene is set outdoors with greenery visible in the background.

FRANCE ON PREMISE CONSUMER PULSE REPORT

CGA by NielsenIQ, December 2025

NielsenIQ



Overview of On Premise visitation during December

Overall decrease in drink-led occasions following summer months

Shift in visitation times

Visitation frequency present a slight increase since last year, with 51% of consumers going out weekly (+3pp).

Weekends are still prime time for activity with nearly 1 in 2 reporting going out on Fridays or Saturdays.

However, visitations experience a slight shift towards earlier hours compared to last year, with a decrease around late nights.

As consumers are going out earlier in the day, ensuring visibility of your brands during those dayparts is key to boost visitation and revenue.

Strong appetite for trying new drinks

This December, French consumers presented a strong appetite for new drink experimentation, with nearly a third having tried a new drink, and half of Gen Z (63%) and Parisians (46%).

Cocktails stand out as the preferred category to experiment (37%), followed afar by apéritifs and beer.

As younger consumers and Parisians show strong appeal for novelty, engage with this highly valuable audience, more daring and experimenting, through innovative and festive cocktails.

Beer and hot drinks are top performers

Beer (37%) and hot drinks (37%) are the most consumed drinks when out, the former presenting an increase since last year (+3pp). With apéritifs, they stand out as top performers across satisfaction metrics.

Additionally, cocktails are particularly appreciated by Parisians (33%) and younger consumers (42%).

Beer should be the foundation of the drinks offering, with cocktails well positioned to cater to consumers wanting to try new drinks.



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 November to December 2025 in France.
- 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 **December 2025** issue, we surveyed 750 consumers (aged 18+) between December 15th – 19th 2025. These consumers were situated across all French regions and must typically visit On Premise venues at least once within a 3-month period.

Key metrics & On Premise visitation



LOOKING BACK



86%

of consumers have been out
to eat in the previous month

-1pp vs December last year

+6pp for Parisians

46%

of consumers have been out
for a drink in the previous month

-2pp vs December last year

-1pp for Parisians



Source: CGA Monthly On Premise Consumer Pulse Report December 2025 – Sample: 150 - 757

LOOKING BACK

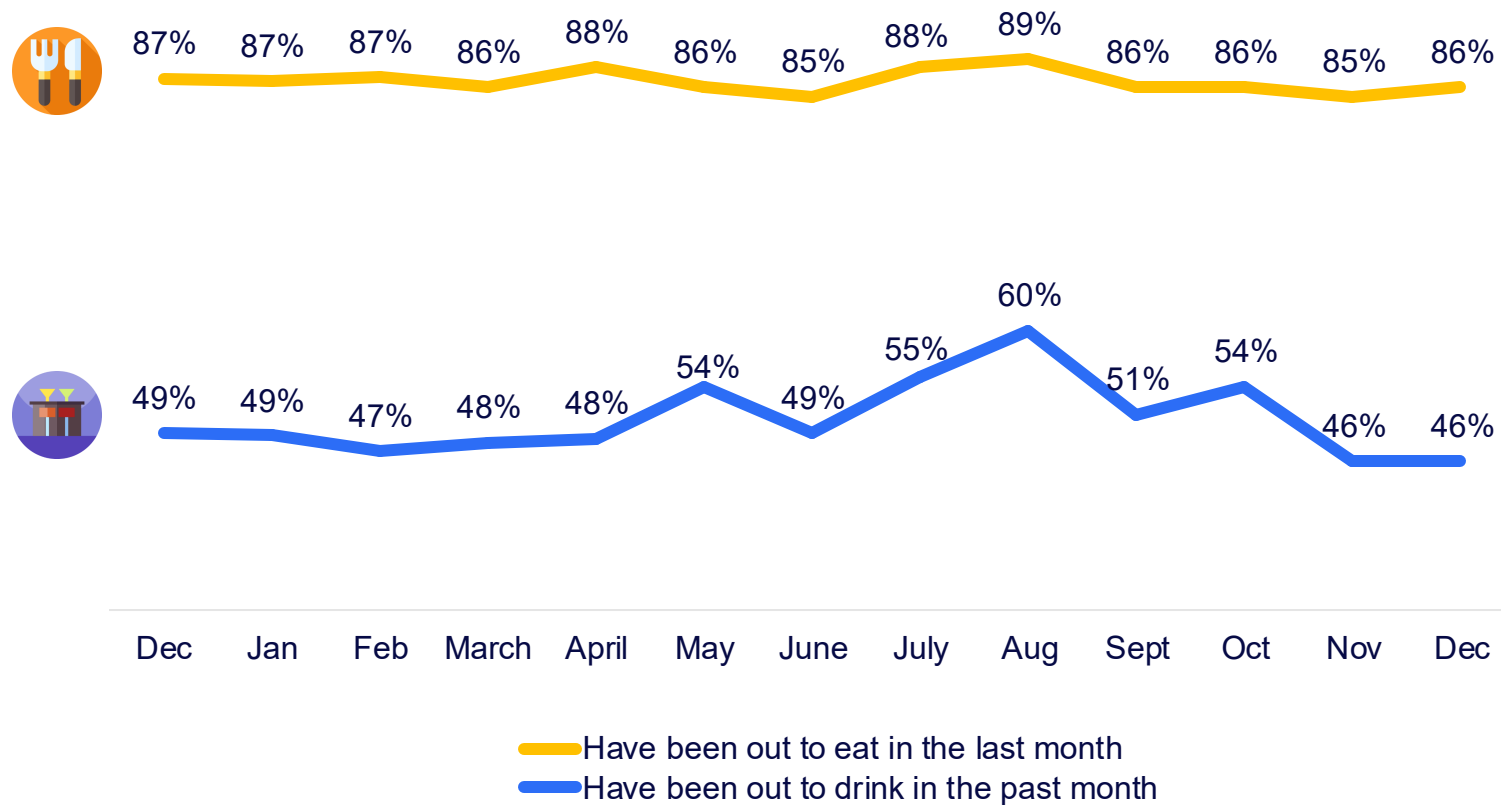


**97% of consumers visited the
On Trade this month**

=0pp vs December last year

FREQUENCY VISITING THE ON PREMISE OVER THESE LAST MONTHS

Yearly visitation rates to the On Premise



Source: CGA Monthly On Premise Consumer Pulse Report December 2025 – Sample: 750 - 757

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

Frequency visiting On Premise in the past month

■ Everyday / almost everyday ■ Weekly ■ Monthly



Overall



=0pp vs December last year

+3pp vs December last year

-2pp vs December last year



To Drink



To Eat



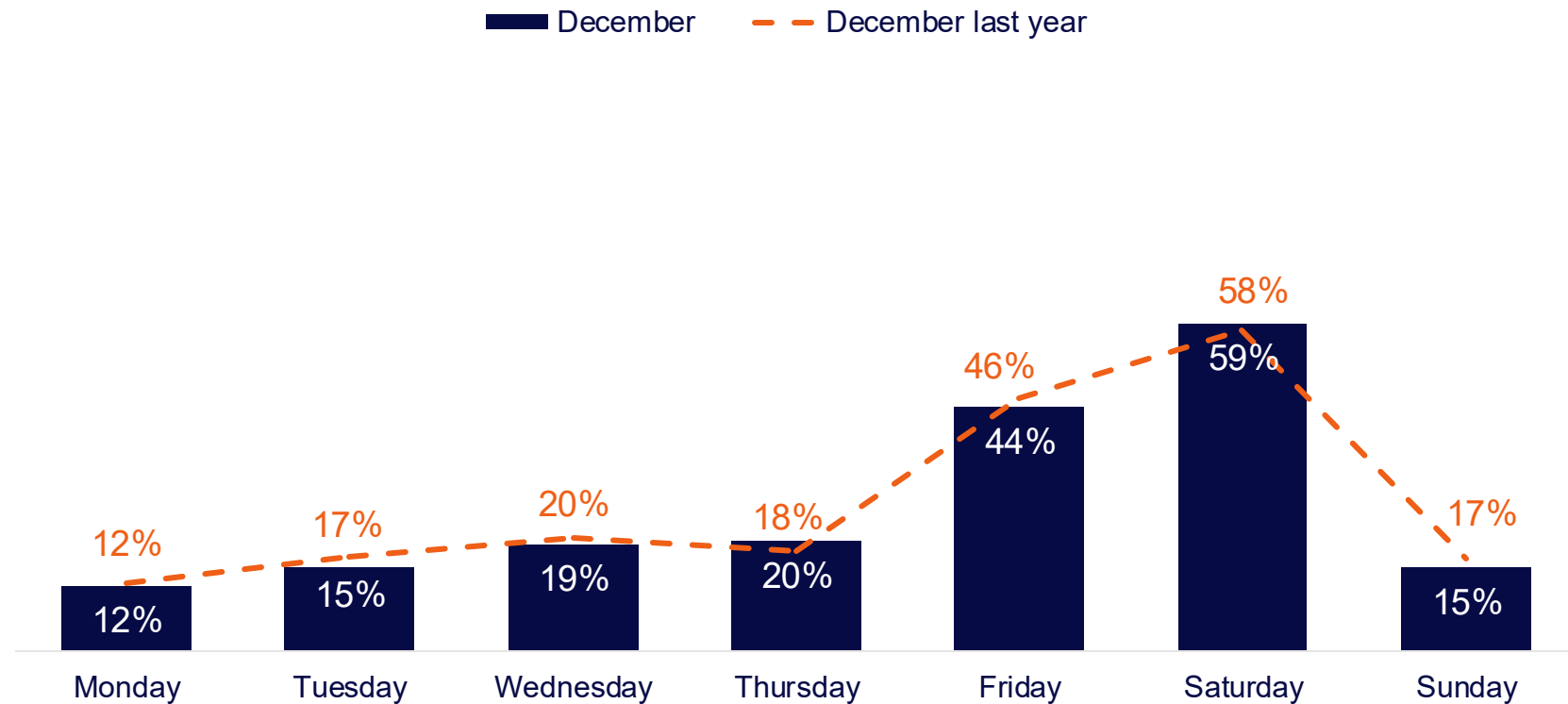
Source: CGA Monthly On Premise Consumer Pulse Report December 2025 – Sample: 346 - 733





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

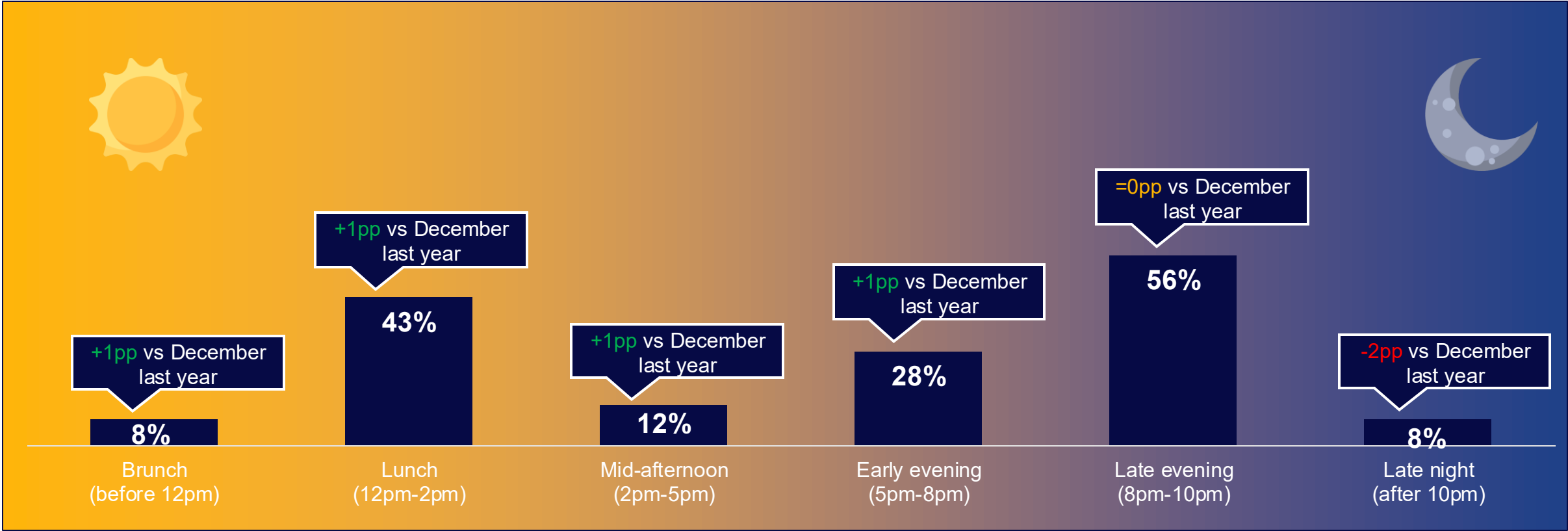
Day of the week visiting the On Premise



Source: CGA Monthly On Premise Consumer Pulse Report December 2025 – Sample: 724 - 733

WHAT TIMES OF DAY HAVE YOU BEEN VISITING BARS, RESTAURANTS AND SIMILAR VENUES OVER THE PAST MONTH?

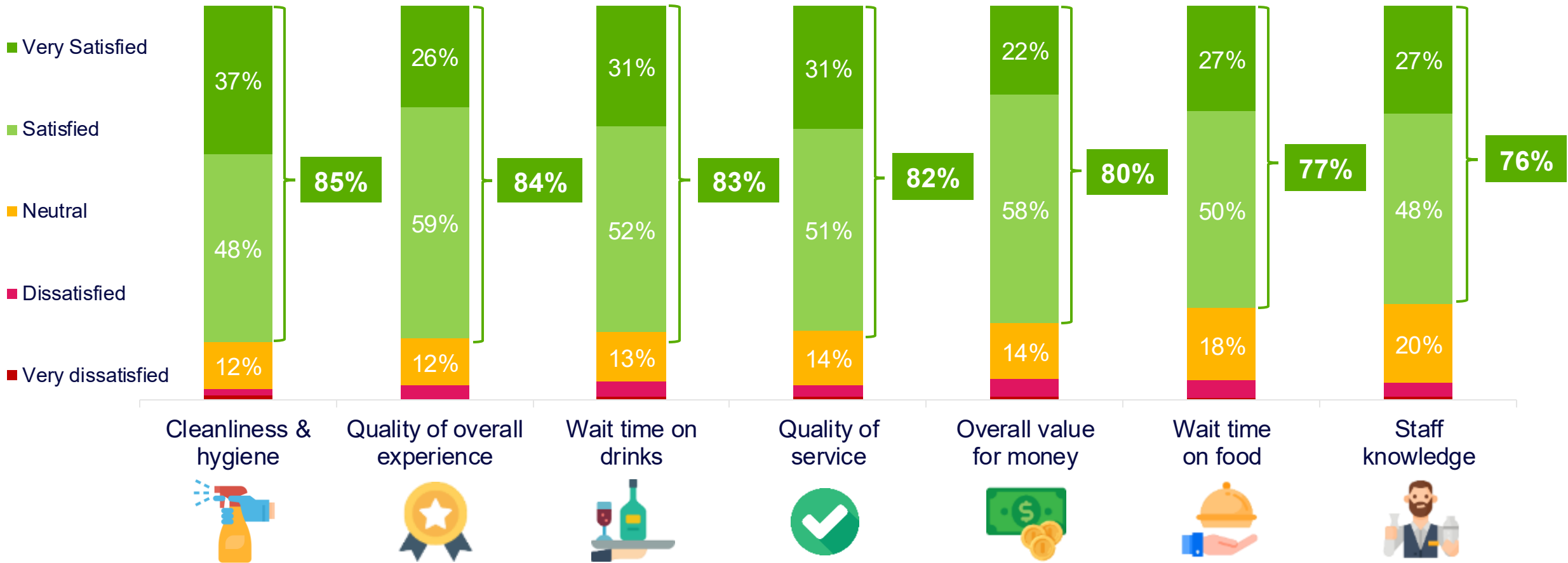
Time of day for visiting the On Premise



Source: CGA Monthly On Premise Consumer Pulse Report December 2025 – Sample: 722 - 732

SATISFACTION WITH MOST RECENT VISIT TO THE ON PREMISE

Proportion of consumers very satisfied/satisfied with...



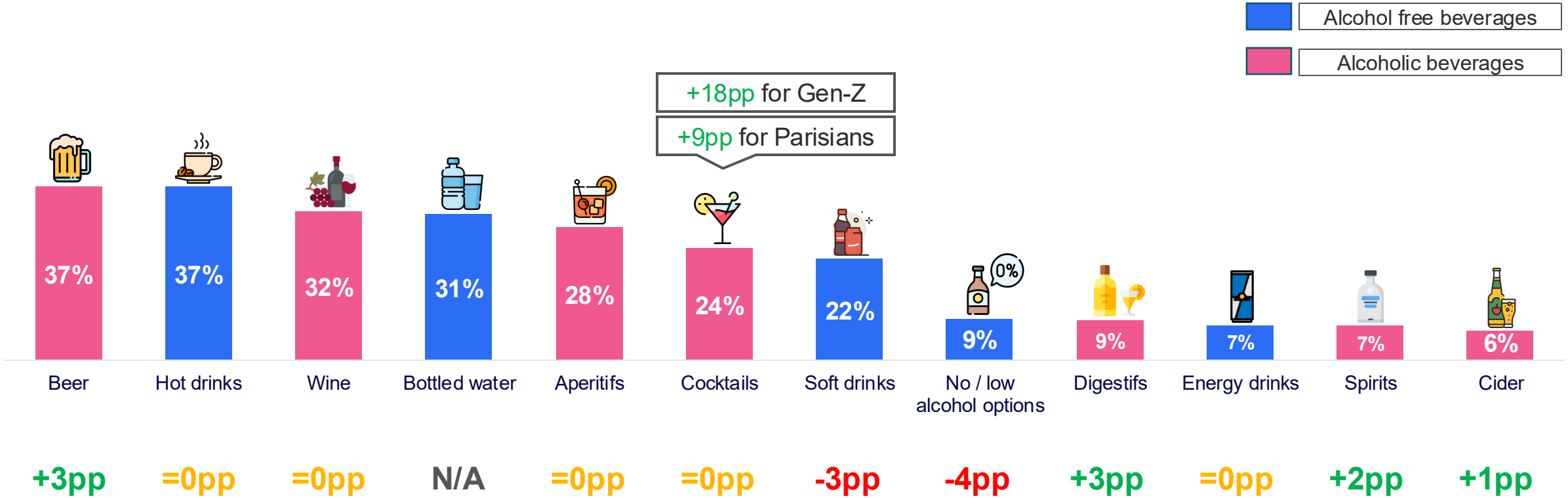
Source: CGA Monthly On Premise Consumer Pulse Report December 2025 – Sample: 639 - 744

Key Metrics: Categories Drunk



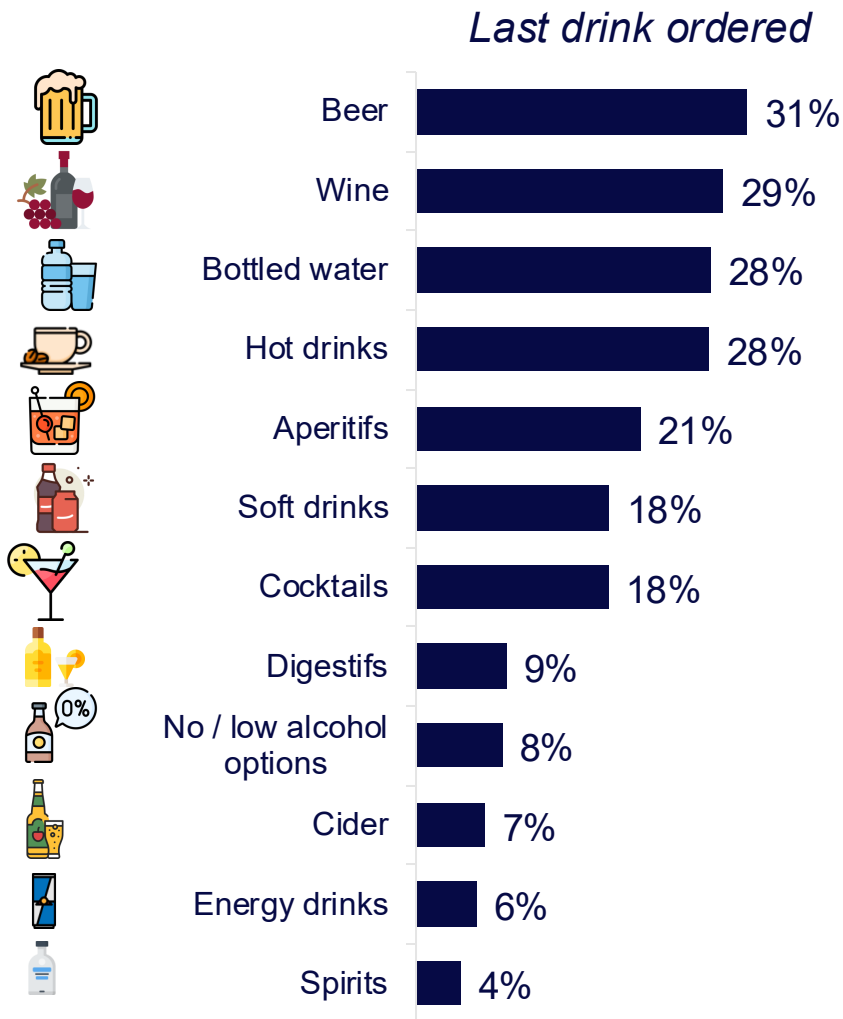
WHICH OF THE FOLLOWING DRINKS HAVE YOU DRANK IN BARS AND/OR RESTAURANTS IN THE PAST MONTH?

Most popular drink categories | Indexed vs. Last year



Source: CGA Monthly On Premise Consumer Pulse Report December 2025 – Sample: 148 - 733

THINKING ABOUT **YOUR MOST RECENT VISIT TO A BAR, RESTAURANT OR SIMILAR VENUE, WHICH OF THE FOLLOWING CATEGORIES DID YOU DRINK?**

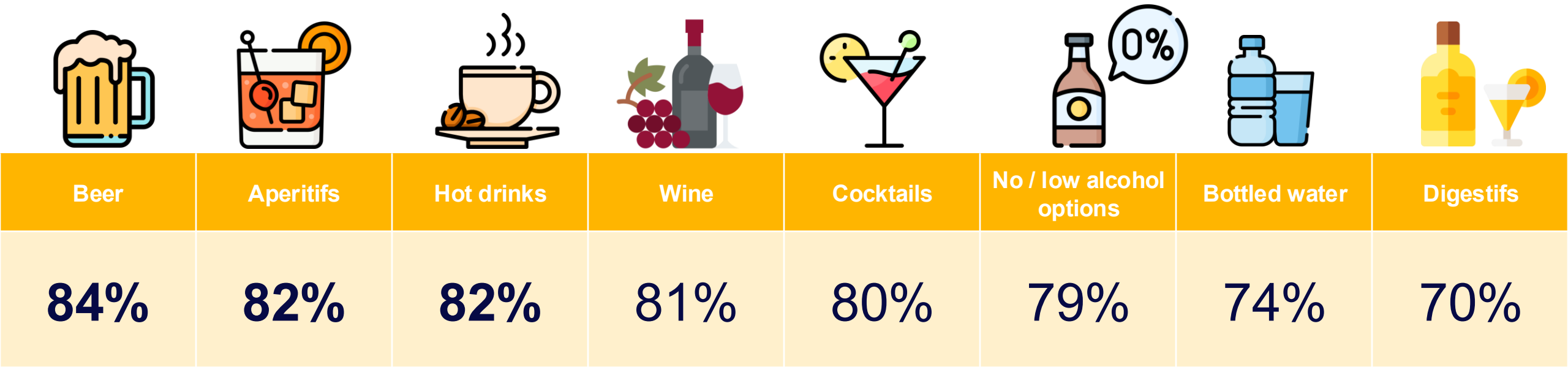


Source: CGA Monthly On Premise Consumer Pulse Report December 2025 – Sample: 750

HOW SATISFIED WERE YOU WITH THE DRINK(S) THAT YOU HAVE HAD ON YOUR MOST RECENT VISIT REGARDING ITS VALUE FOR MONEY?

Shown to individual drink category consumer on latest visit

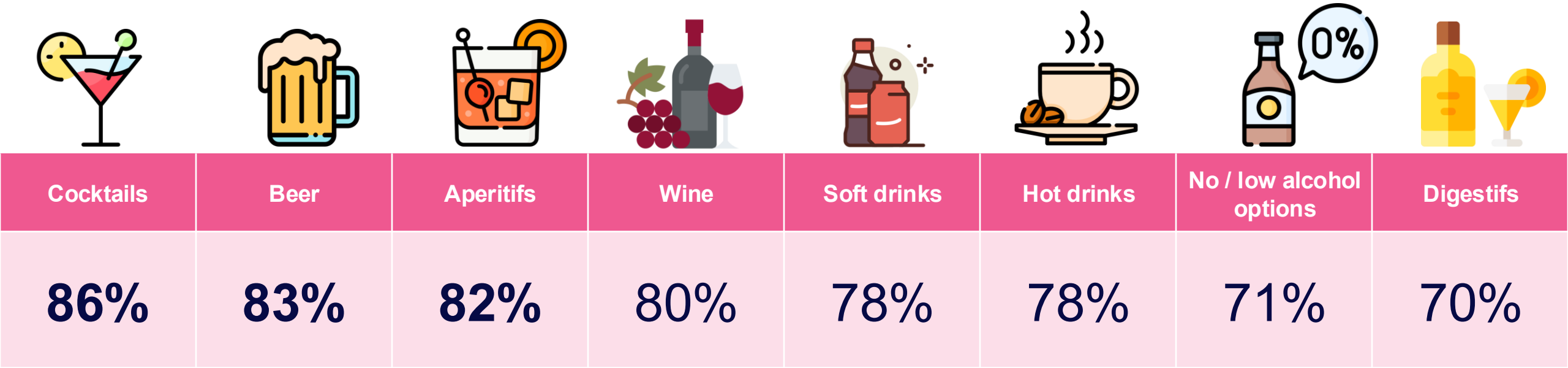
% very satisfied / satisfied with value for money 



Source: CGA Monthly On Premise Consumer Pulse Report December 2025 – Sample: 61 - 233

HOW SATISFIED WERE YOU WITH THE DRINK(S) THAT YOU HAVE HAD ON YOUR MOST RECENT VISIT REGARDING HOW EXCITING IT WAS?

Shown to individual drink category consumer on latest visit
% very satisfied / satisfied with how exciting the drink was 🌟



Source: CGA Monthly On Premise Consumer Pulse Report December 2025 – Sample: 59 - 233

HOW SATISFIED WERE YOU WITH THE DRINK(S) THAT YOU HAVE HAD ON YOUR MOST RECENT VISIT REGARDING ITS **QUALITY OF SERVE?**

Shown to individual drink category consumer on latest visit
% **very satisfied** / **satisfied** with **The overall quality of the serve** 

							
Aperitifs	Wine	Hot drinks	Beer	Cocktails	Cider	Bottled water	Soft drinks
90%	89%	89%	89%	89%	88%	87%	82%

Source: CGA Monthly On Premise Consumer Pulse Report December 2025 – Sample: 50 - 236



HAVE YOU TRIED A NEW DRINK WHEN EATING OR DRINKING OUT OVER THE PAST MONTH?

+31pp for Gen-Z

+14pp for Parisians



32%

Yes



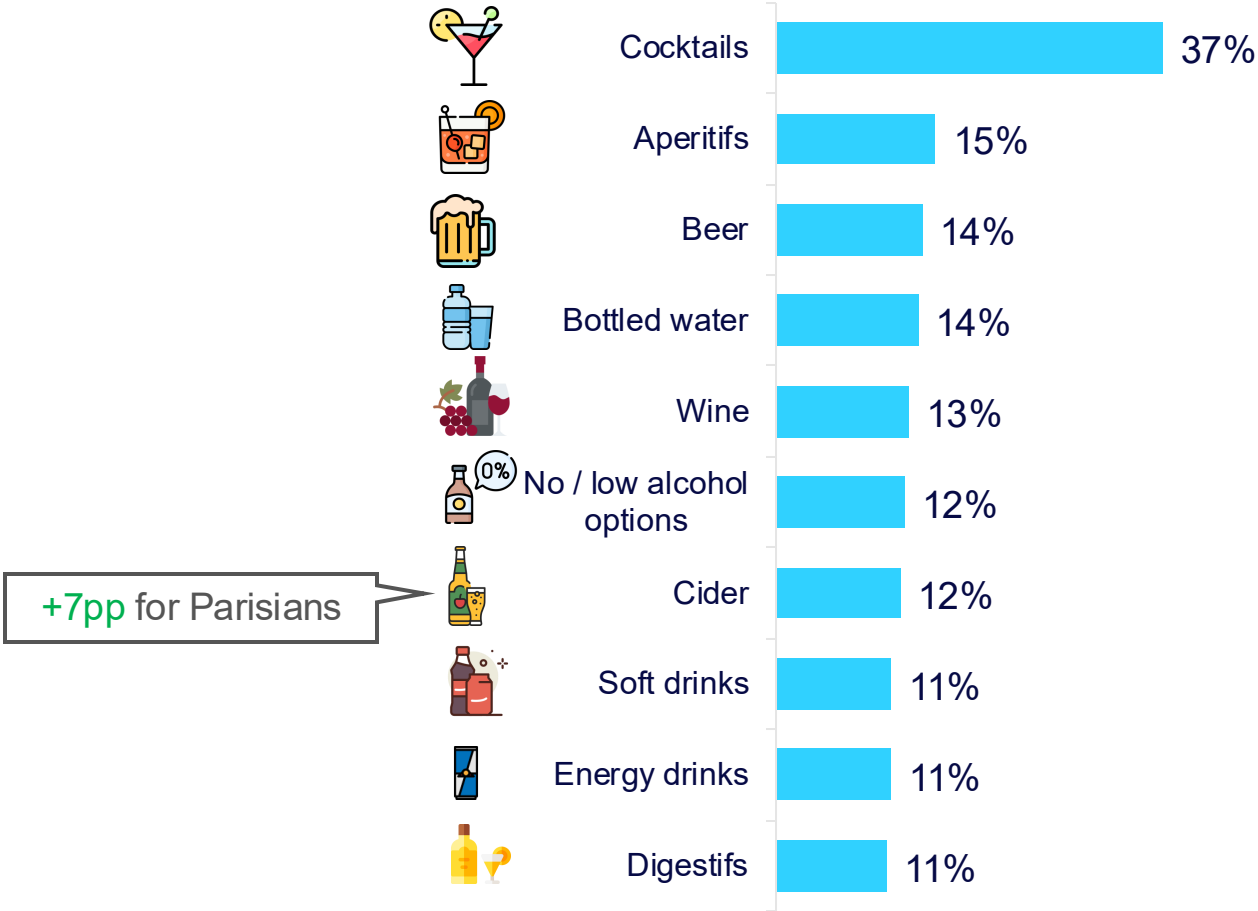
68%

No

Source: CGA Monthly On Premise Consumer Pulse Report December 2025 – Sample: 148 - 724

WHICH OF THE FOLLOWING CATEGORIES WAS THE NEW DRINK THAT YOU TRIED?

Top 10 new drinks tried by those going out for food and drinks



Source: CGA Monthly On Premise Consumer Pulse Report December 2025 – Sample: 68 - 233

Key Metrics: Next Month Prognosis





74%

of consumers plan to go out
to eat in the next month

+6pp for Parisians

36%

of consumers plan to go out
for a drink in the next month



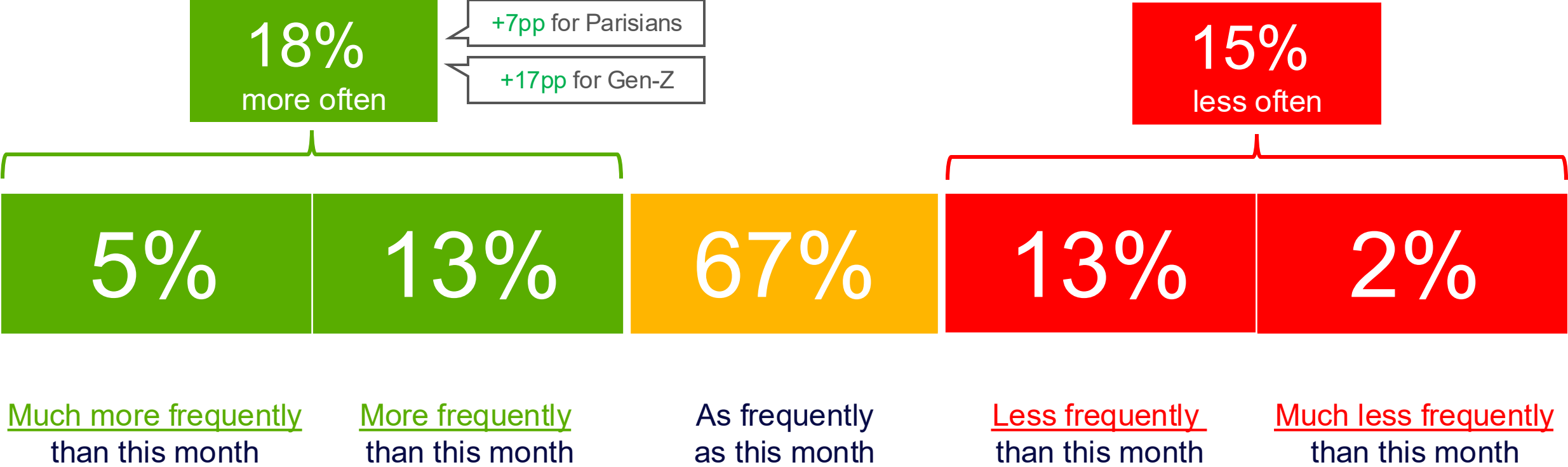
LOOKING FORWARD



Source: CGA Monthly On Premise Consumer Pulse Report December 2025 – Sample: 150 - 748

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

Frequency consumers plan to visit the On Premise in the next month



Source: CGA Monthly On Premise Consumer Pulse Report December 2025 – Sample: 138 - 682

Stay up to date with On Premise trends and understand the impact they have on your brand and business performance



Scan the code or click [*here*](#) to receive the latest insight delivered straight to your inbox!

Subscribe to The Measure today!

The Measure

*On Premise news
& insights*



NielsenIQ



CGA: Consumer Tools

Additional Consumer Reporting where CGA by NIQ's expertise can be leveraged



Custom RFP Support Decks

Take group-specific sales stories to your national account customers to speak to their consumers and showcase how your portfolio aligns with their strategies



Consumer Segmentation

Strategically and effectively target specific On Premise drinkers to identify offerings and opportunities that relate to them, ensuring \$ are spent more effectively in On Premise brand building



Optimum Assortment

CGA's assortment tool allows you to enable your teams to showcase the optimal range for outlets and highlight where brands should be placed within a range to achieve highest sales and increase customer satisfaction



Custom Research

From online surveys to focus groups and in-outlet intercepts, CGA has access to millions of consumers across the world to answer your most important questions



Path to Purchase

Understand the decision corridor consumers go through when purchasing products, and identify how these choices impact the decisions that result in final sales



Bartender Research

Bartenders and servers are the final touch point of influence in the channel. With such change, understanding advocacy and bartender needs is extremely important in influencing the sales of your products

Find out how build a successful On Premise strategy

For more information on how CGA by NIQ can help your business grow in the French On Premise, get in touch:



JULIEN VEYRON

Client Solutions Director

Julien.veyron@nielseniq.com



CHLOÉ RENCKERT

Client Success & Insights Manager - France

Chloe.renckert@nielseniq.com



STEPHEN WANN

Client Director - EMEA

Stephen.wann@nielseniq.com



ANDREW PETROU

Consumer Research Manager

Andrew.petrou@nielseniq.com