

A group of people at a social gathering, possibly a bar or restaurant, holding glasses of mint lemonade. The drinks are garnished with lime slices and fresh mint leaves. The background is slightly blurred, showing other people and indoor plants.

FRANCE ON PREMISE CONSUMER PULSE REPORT

CGA by NIQ, November 2023


CGA
Powered by NIQ

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 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 November 2023 issue, we surveyed 754 consumers (aged 18+) between 23rd – 25th November. These consumers were situated across all French regions and must typically visit On Premise venues at least once within a 3-month period.
- This report touches upon hot topics including Christmas, Christmas markets, coffee and ready to drink alcohol.

SUMMARY: TOPLINE VISITATION & INTENTION

- Monthly food-led visits have remained stable since October, with 88% of consumers having been out for food, whilst visits for drinks have declined by 3pp.
- Although there are slightly more consumers visiting the On Premise overall, a growing majority of them are reducing their usual visiting frequency.
- Gen Z remain the demographic to target, visiting the On Premise much more than average this month, and planning to go out much more over December.
- The rising cost of living remains the primary driver of decreasing visitation and increased spend, although have been less significant throughout this month compared to October, with the weather and prioritising spend elsewhere becoming more prominent factors as the festive season approaches.
- Most consumers (88%), plan to visit the On Premise for either food or drink during the Christmas period, and with 50% planning to go on domestic holidays, hotels will be an important channel to focus on during December.
- 87% of consumers plan to visit Christmas Markets, with vin chaud, beer and cocktails being the preferred alcoholic choices for consumers.
- 46% of consumers visit the on premise weekly for coffee, with visitation shifting away from the middle of the day compared to a year ago, towards both the morning and late night.
- Over half of all consumers drink RTDs with the majority drinking them in the On Premise.

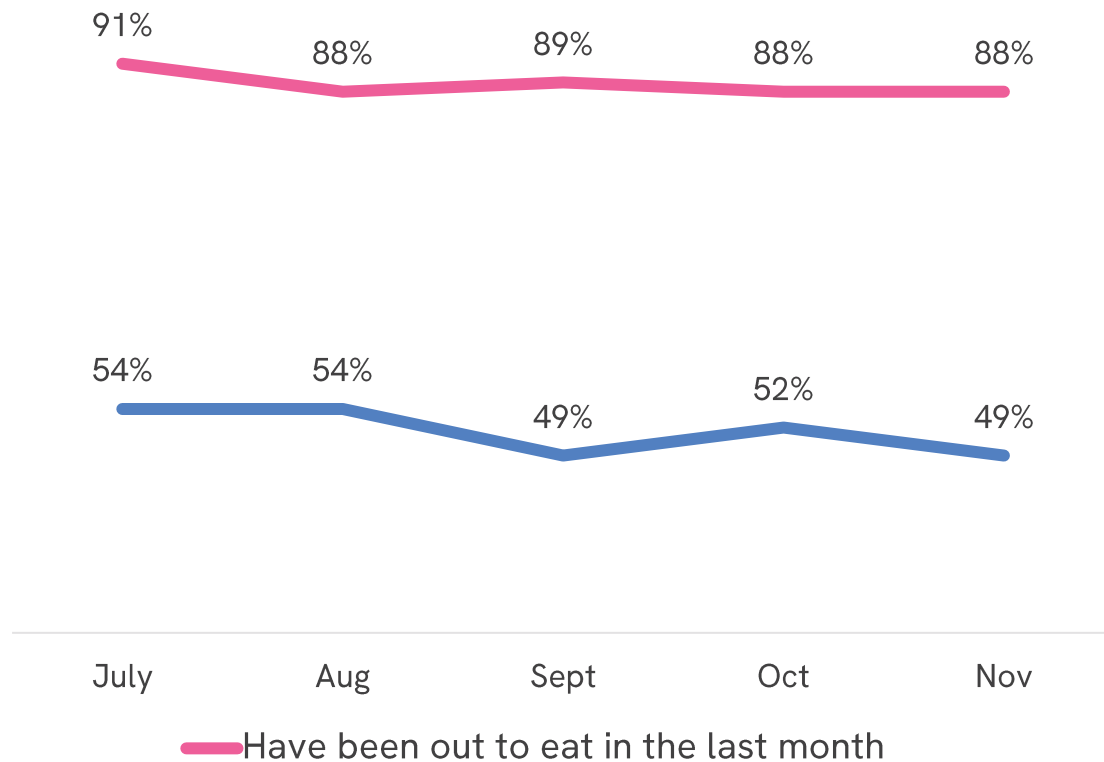


KEY METRICS / ON PREMISE VISITATION

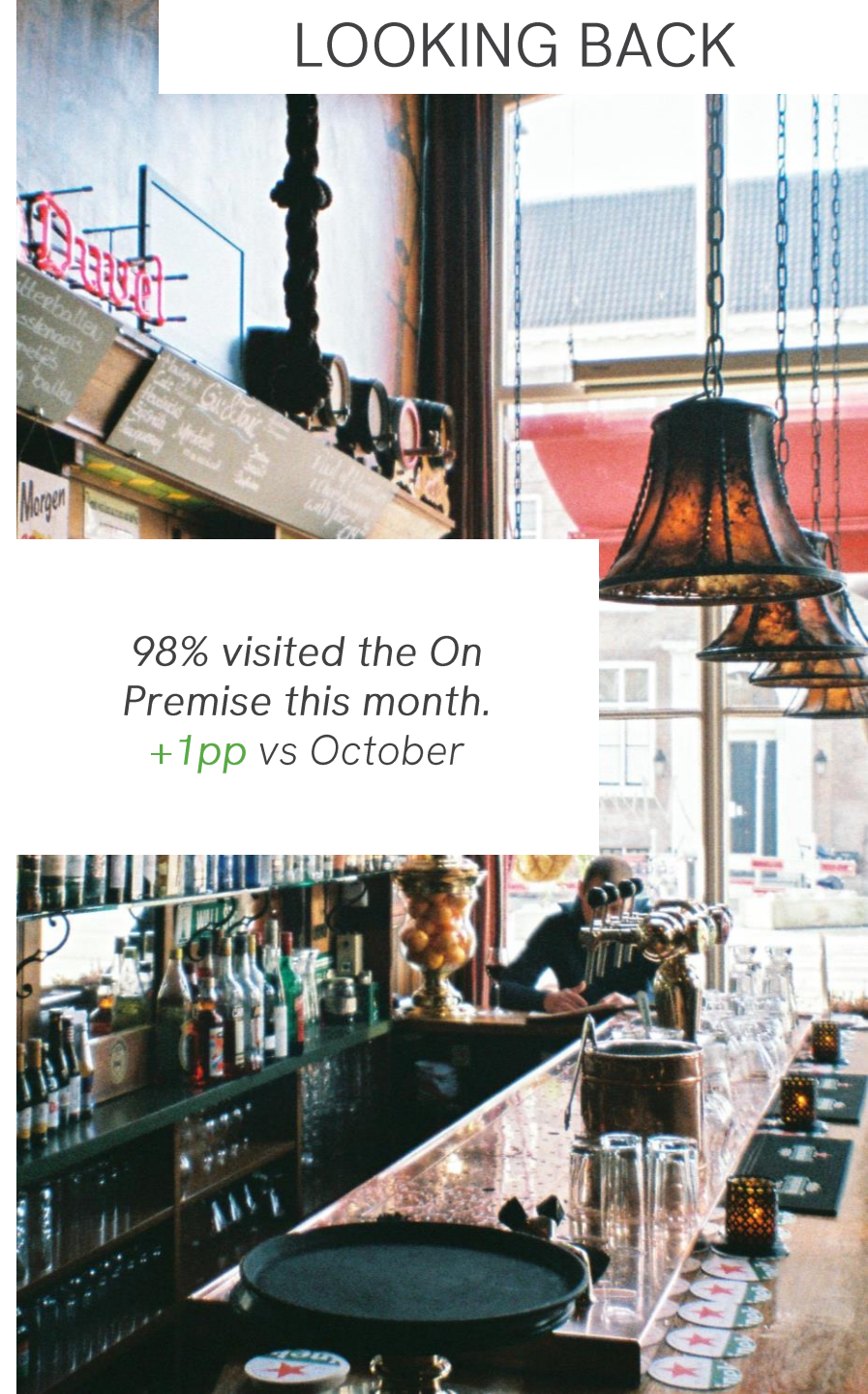
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VISITATION IN THE ON PREMISE OVER THE PAST MONTH

Visits this month to the On Premise



98% visited the On Premise this month.
+1pp vs October





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

Change in frequency of visitation



21%

Going out more often

-4pp vs October

41%

Going out the same

-1pp vs October

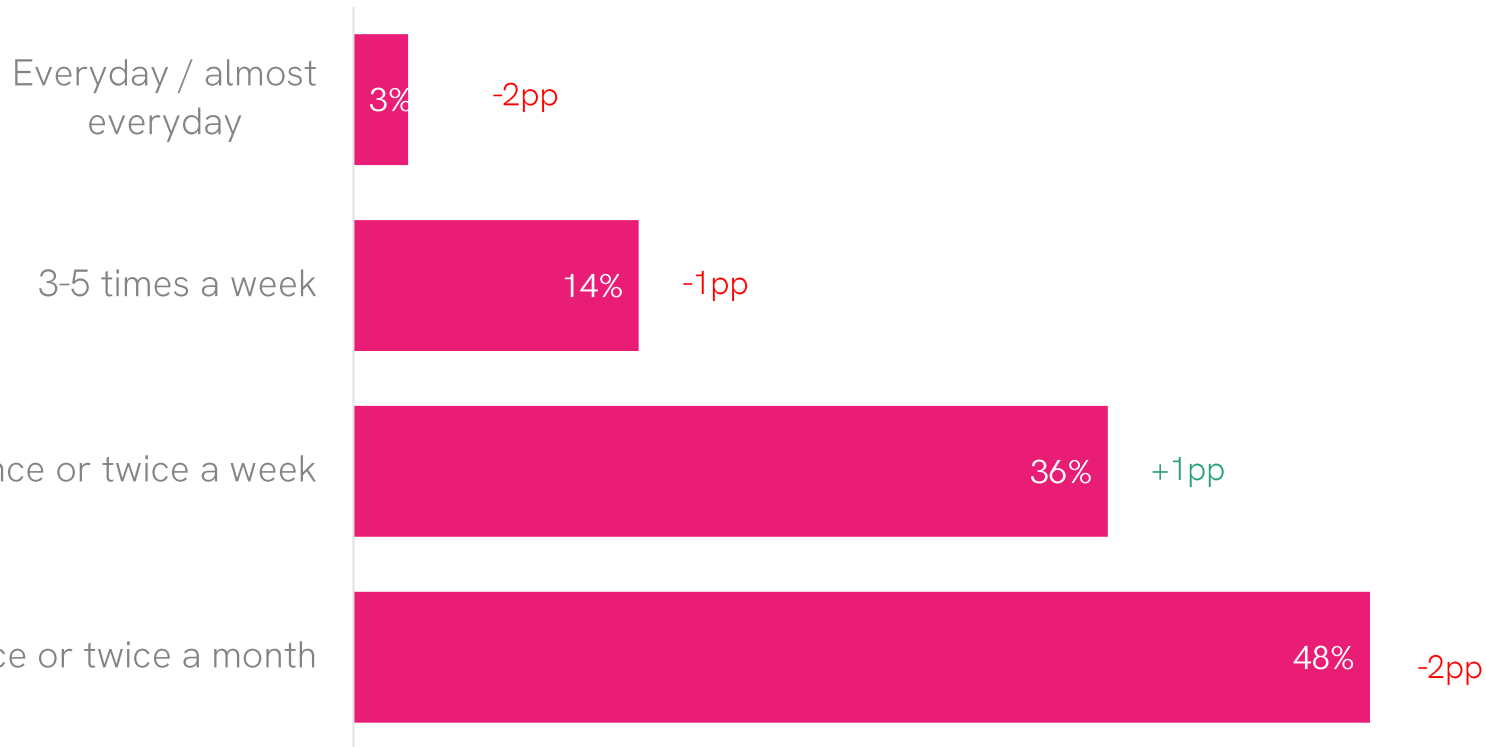
38%

Going out less often

+5pp vs October

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

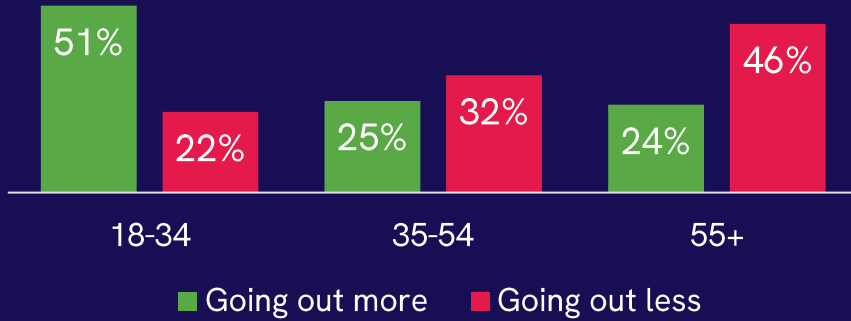
Visiting habits (vs October)



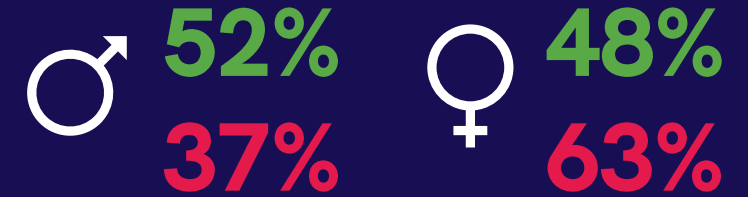
Those visiting the on premise more frequently than usual are typically younger, more likely to be located within the city / town centre and with a higher average household income than those who are visiting less often

Going out more | Going out less

Age groups



Gender



Location of residence



71% 56%

City centre / town centre

29% 44%

Rural / suburban

Average household income

€40,594

€32,335

Typically visits the On-Premise...

At least weekly 84% 27%

45%

Of Gen Z are going out more often this month

+24pp vs average consumer

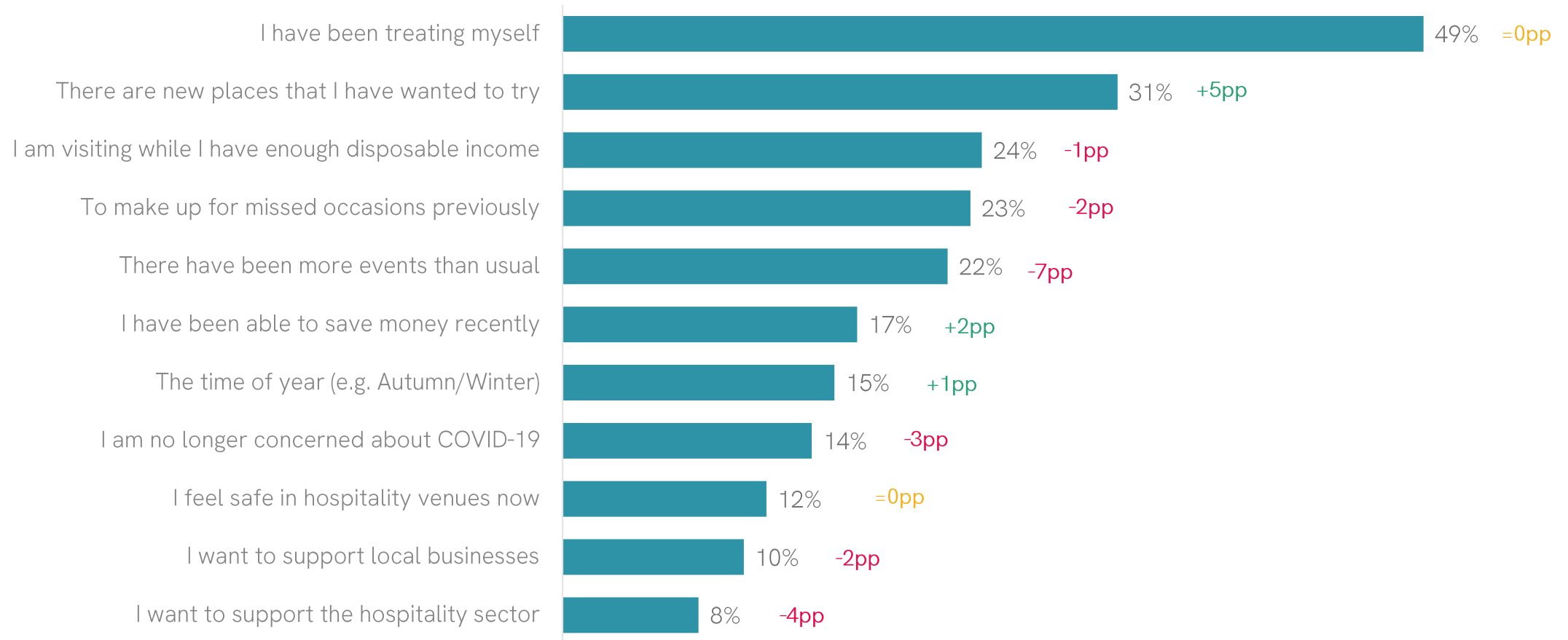
35%

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

+13pp vs average consumer

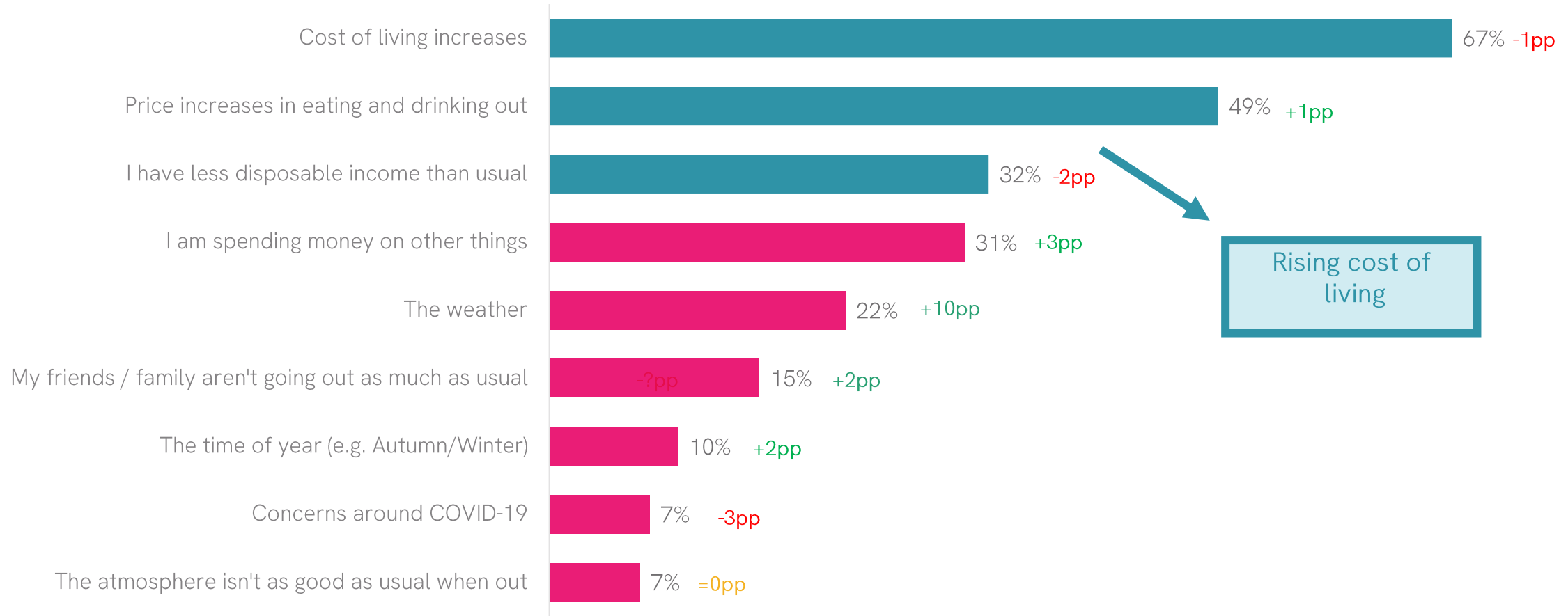
YOU HAVE SAID THAT YOU ARE CURRENTLY GOING OUT MORE FREQUENTLY THAN USUAL, WHY IS THIS?

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



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

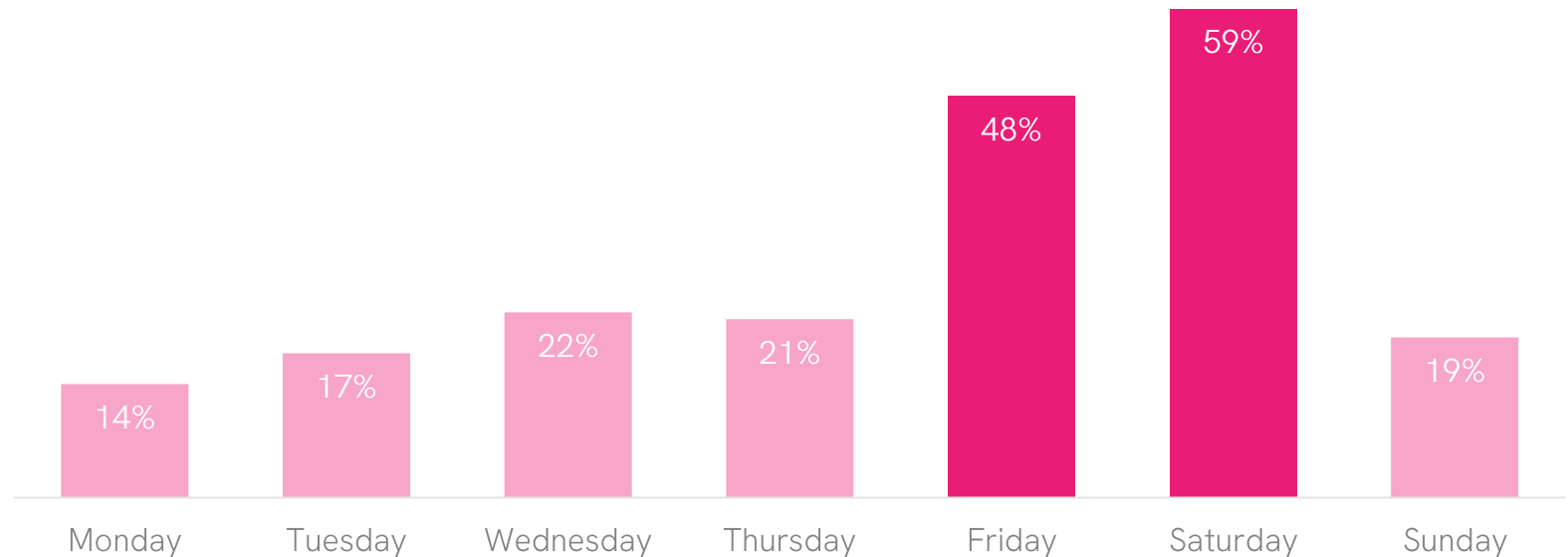
Reasons for going out to the on premise less frequently than usual (vs October)





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



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

Change in on premise behaviours

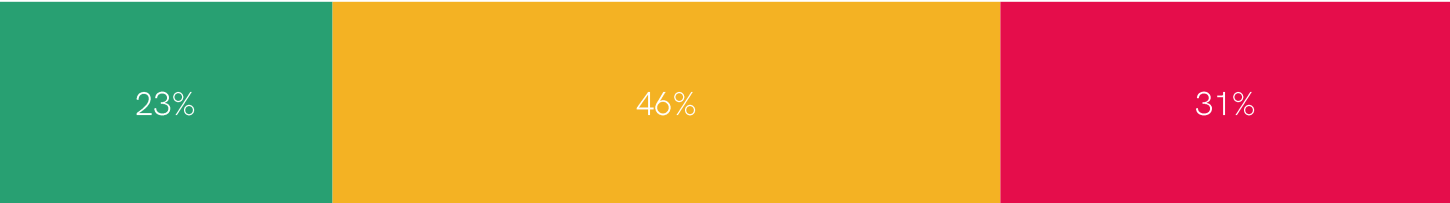
NET Change

How much I spend on eating and drinking out overall



-11pp

How much I spend when out per visit

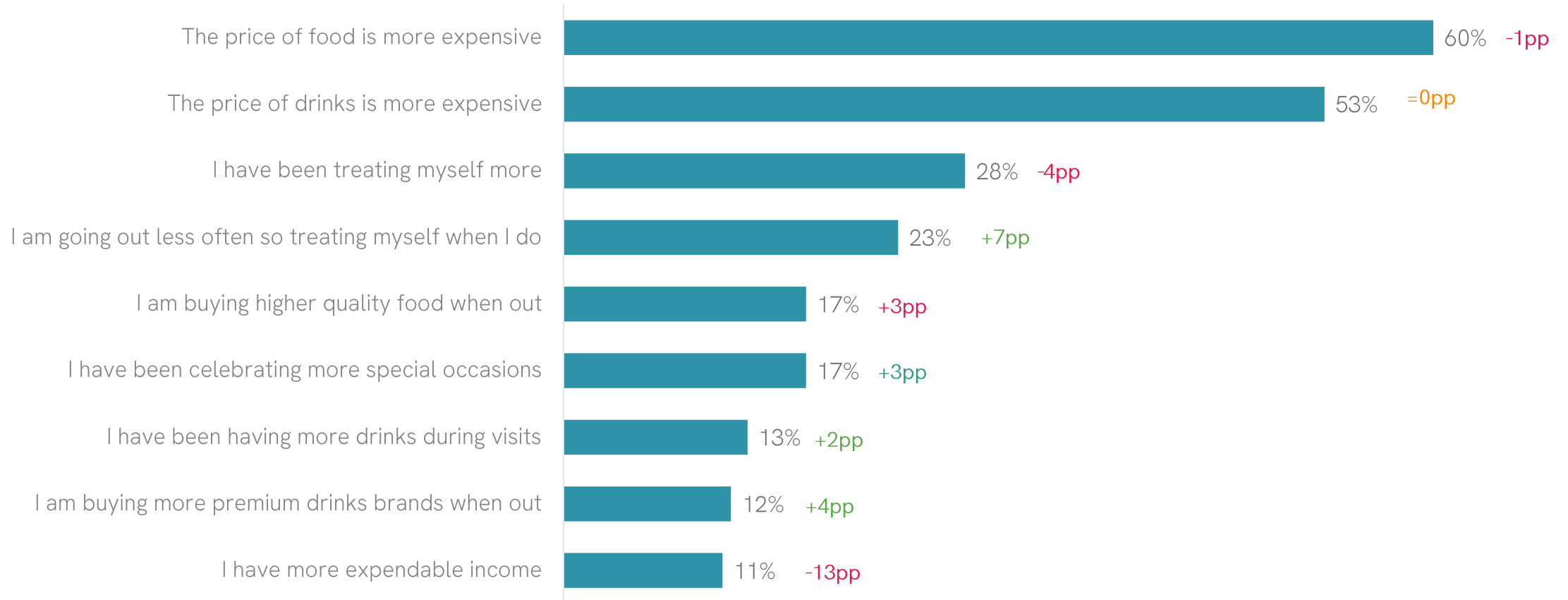


-8pp

■ Increased ■ Stayed the same ■ Decreased

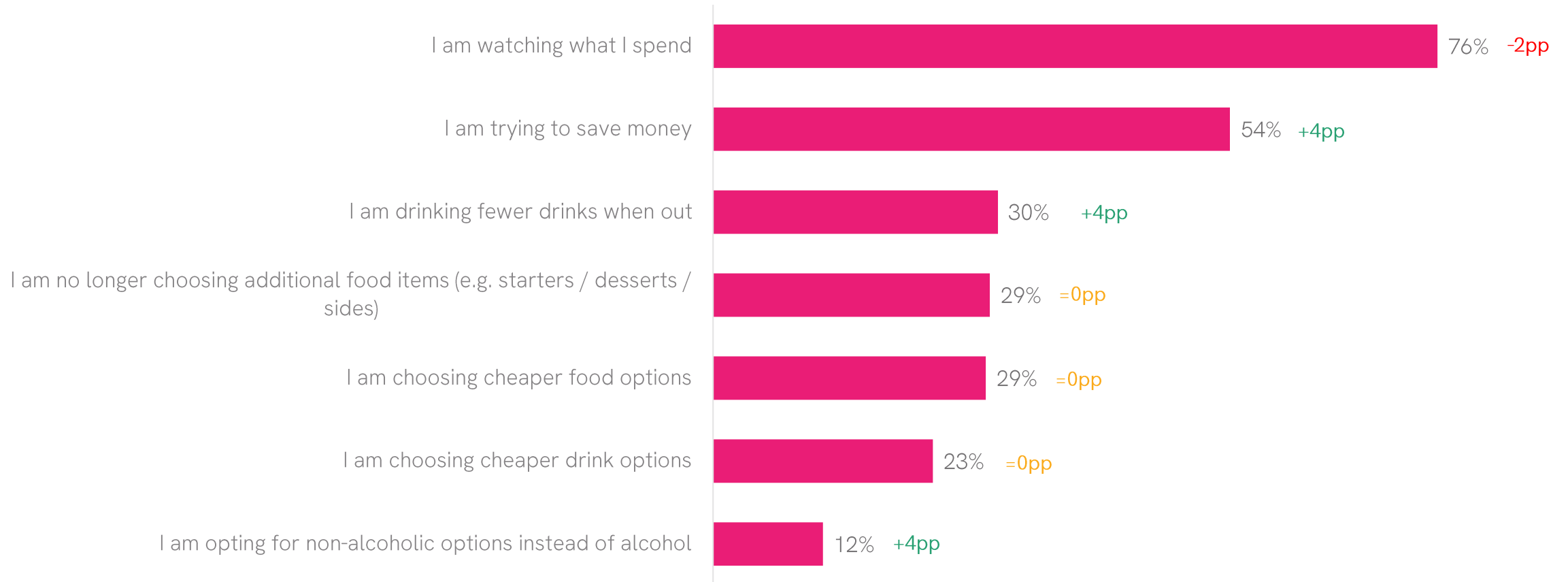
WHICH IF ANY OF THE FOLLOWING ARE REASONS WHY YOU ARE SPENDING MORE NOW WHEN OUT PER VISIT IN BARS, RESTAURANTS AND SIMILAR VENUES?

Reasons for increased spend per visit (vs October)



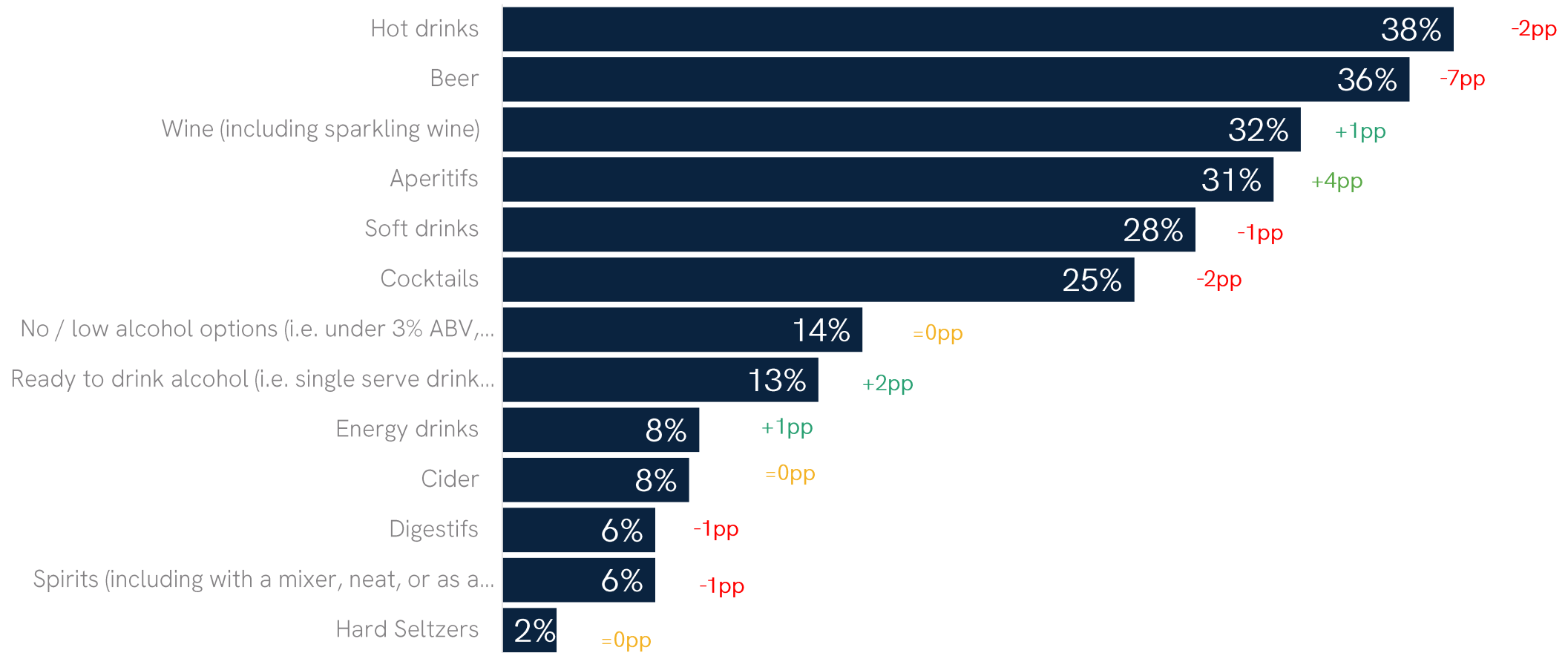
WHICH IF ANY OF THE FOLLOWING ARE REASONS WHY YOU ARE SPENDING LESS NOW WHEN OUT PER VISIT IN BARS, RESTAURANTS AND OTHER SIMILAR VENUES?

Reasons for decreased spend per visit (vs October)



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

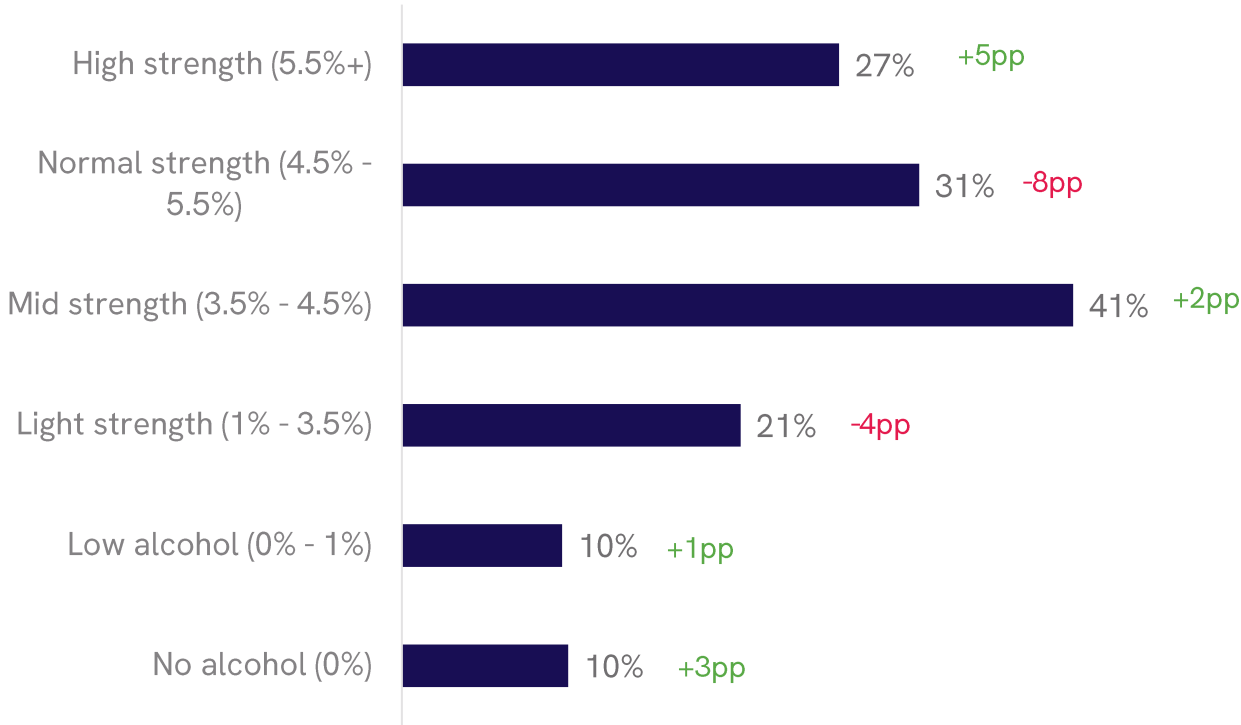
Drink choice of those who have visited the On Premise in the past month (vs October)





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

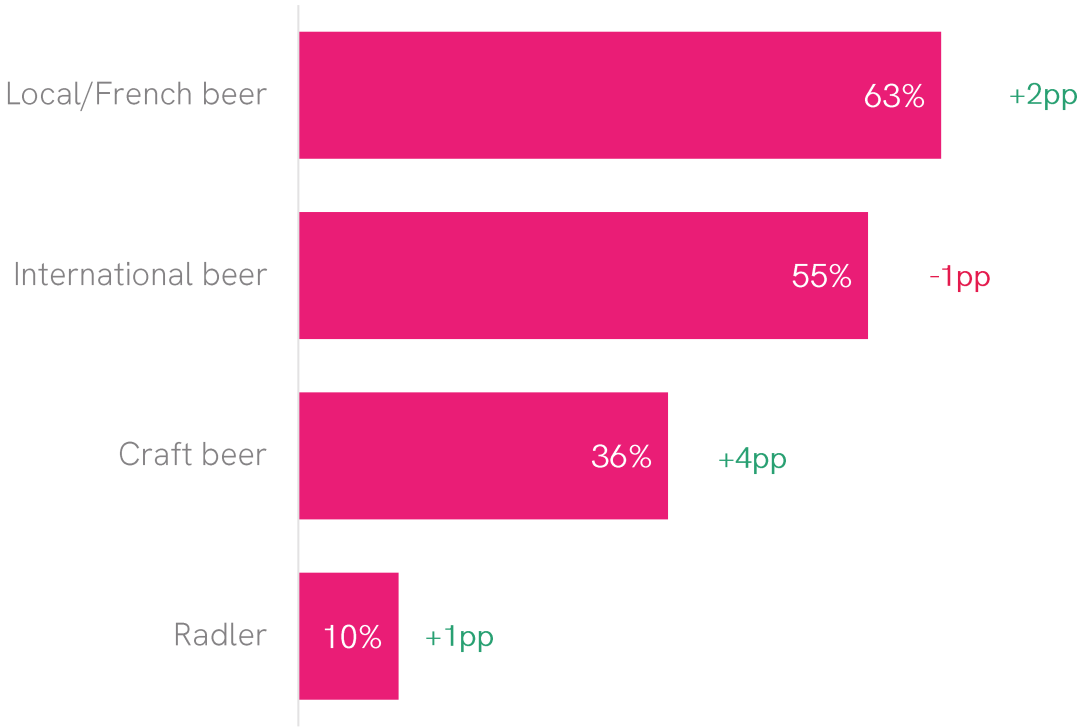
Strengths of beer consumers have drunk in the past month (vs average over past month)





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 October)



VISITATION PLANS FOR THE ON PREMISE MONTH AHEAD

88%

Plan to go out to eat
in the next month
=0pp vs October



52%

Plan to go out to eat in
the next month
=0pp vs October



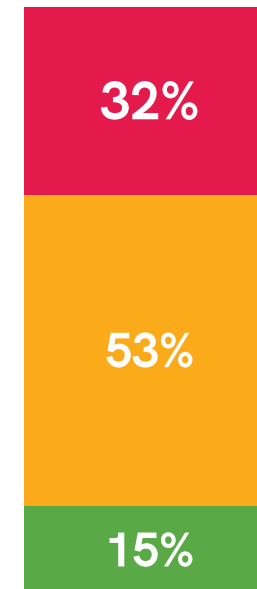
2% don't plan to visit the
on premise next month
=0pp vs October



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

- Less frequently
- As frequently
- More frequently



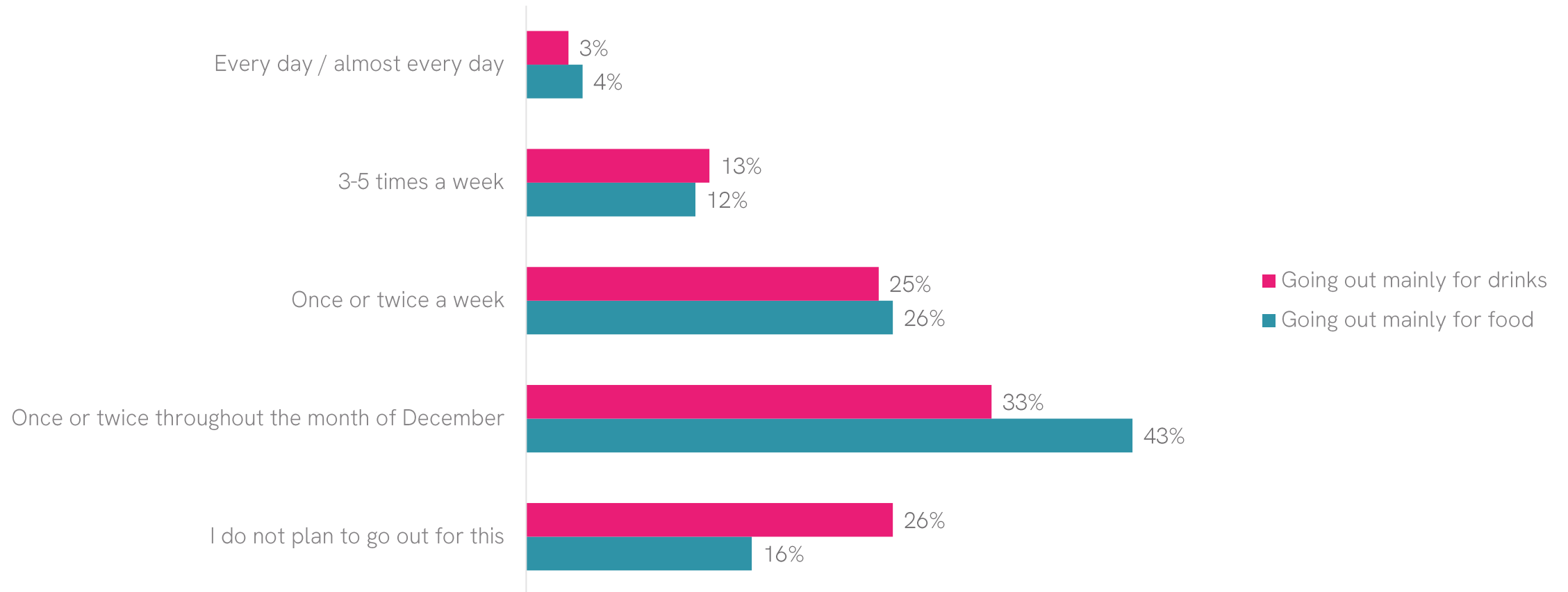
+16pp for Gen Z

Hot Topic - Christmas



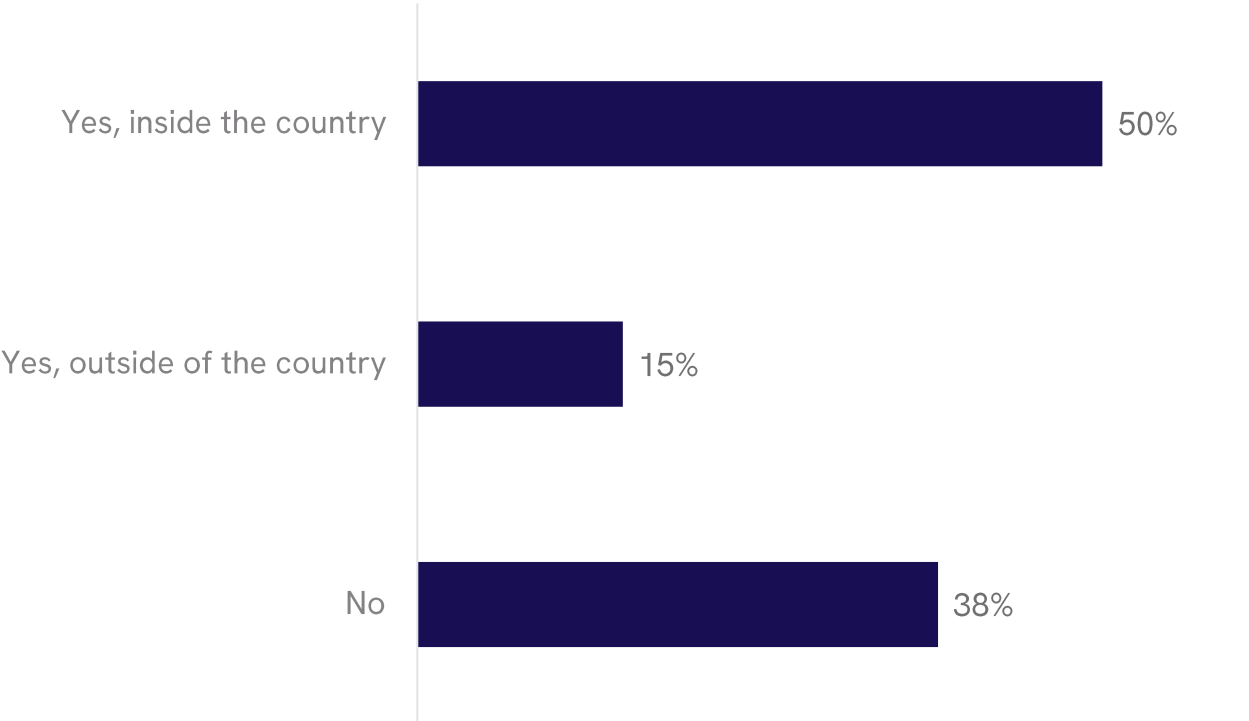
HOW OFTEN DO YOU PLAN TO VISIT PUBS, BARS, RESTAURANTS, OR SIMILAR VENUES OVER THE CHRISTMAS PERIOD (THROUGHOUT THE MONTH OF DECEMBER)

Visitation frequency over the Christmas period

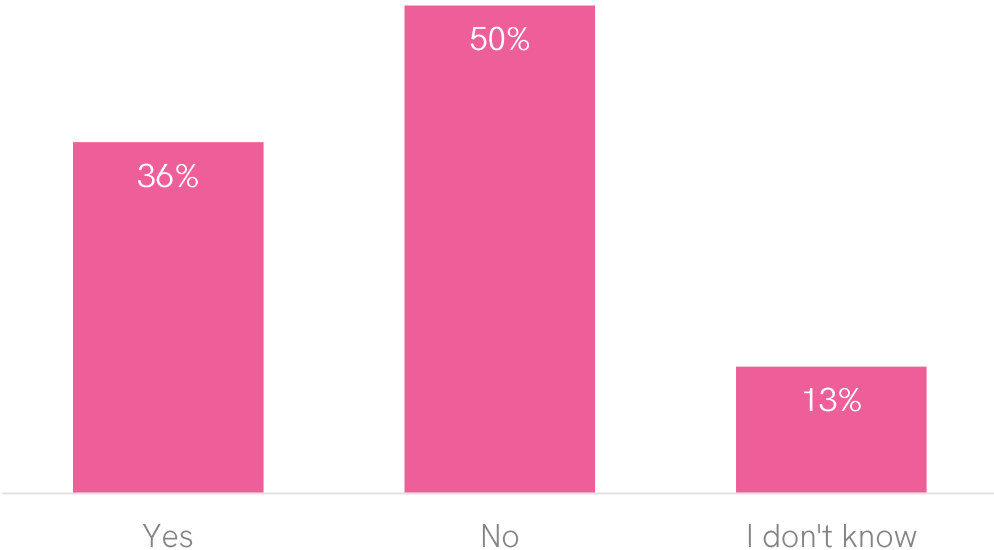


CONSUMERS PLANS DURING THE CHRISTMAS PERIOD (THROUGHOUT THE MONTH OF DECEMBER)

Consumers going on a festive break

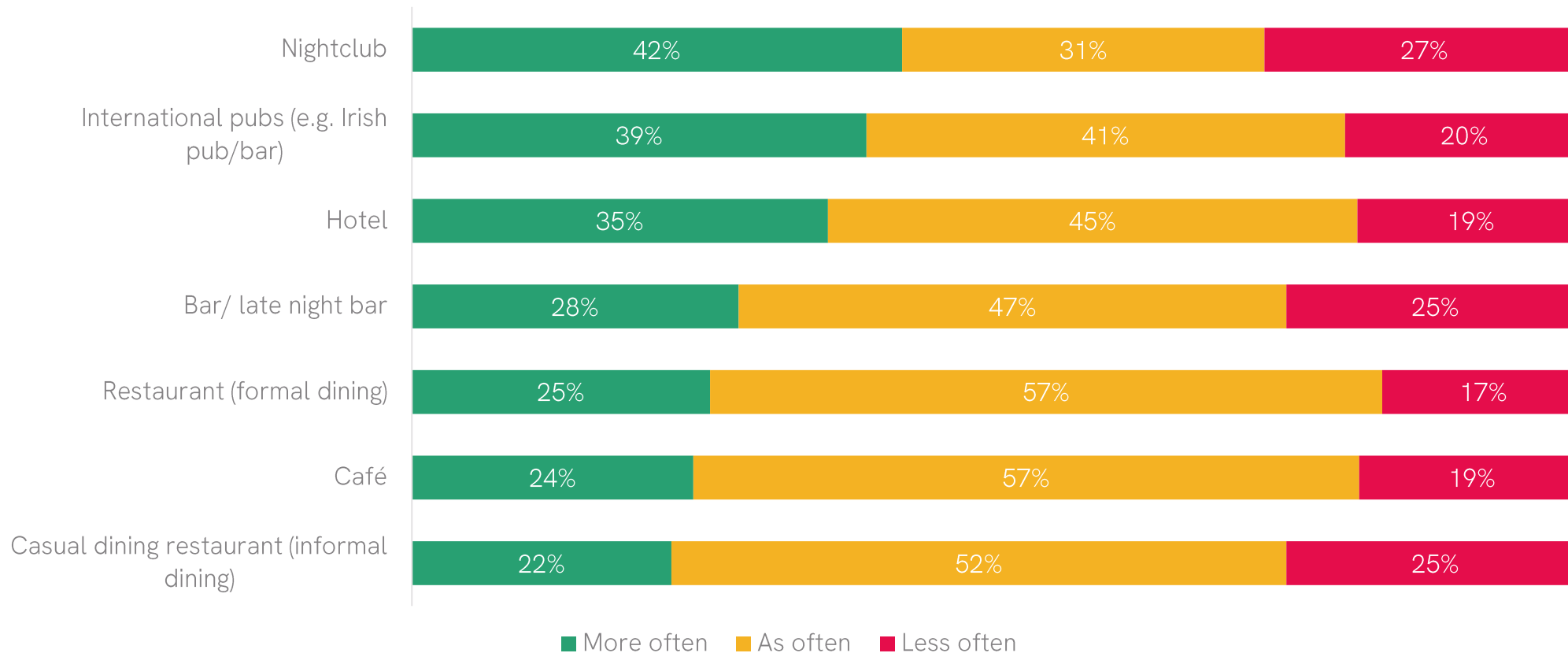


Consumers going to an Office party



HOW OFTEN DO YOU THINK YOU WILL VISIT THESE VENUES DURING THE CHRISTMAS PERIOD COMPARED TO USUAL

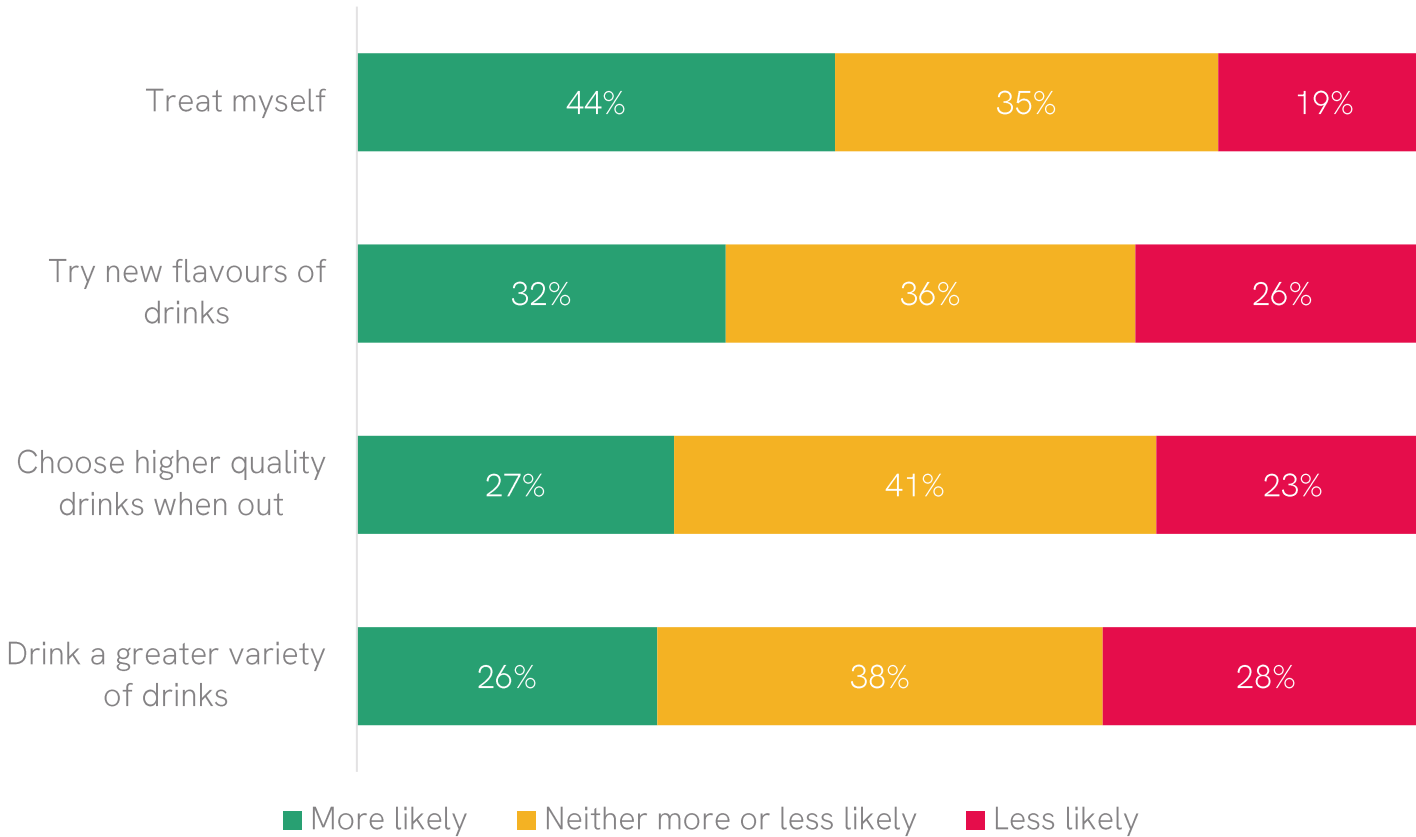
Visitation frequency



32% of consumers are visiting Christmas markets more often than they usually do in December

COMPARED TO ONE YEAR AGO ARE YOU MORE OF LESS LIKELY TO DO ANY OF THE FOLLOWING WHEN VISITING PUBS, BARS, RESTAURANTS, OR SIMILAR VENUES DURING THE CHRISTMAS PERIOD

Change in consumption habits





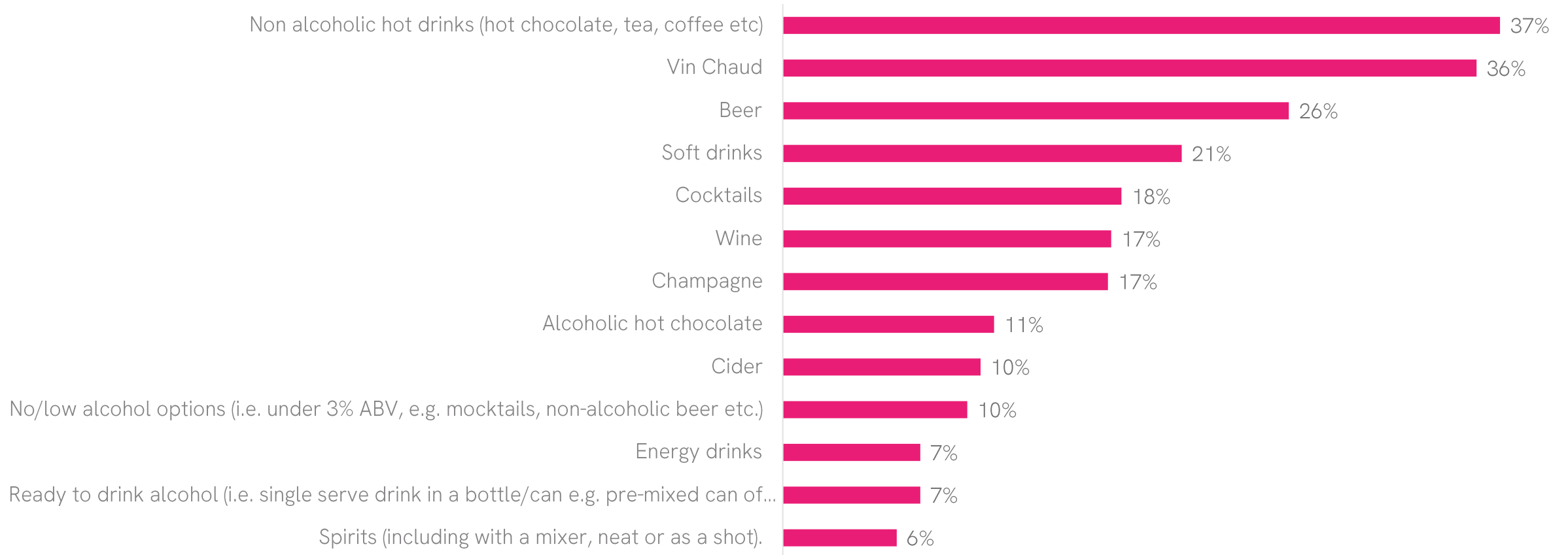
87%

of consumers plan
to visit Christmas
markets over
December

+10pp for Gen Z

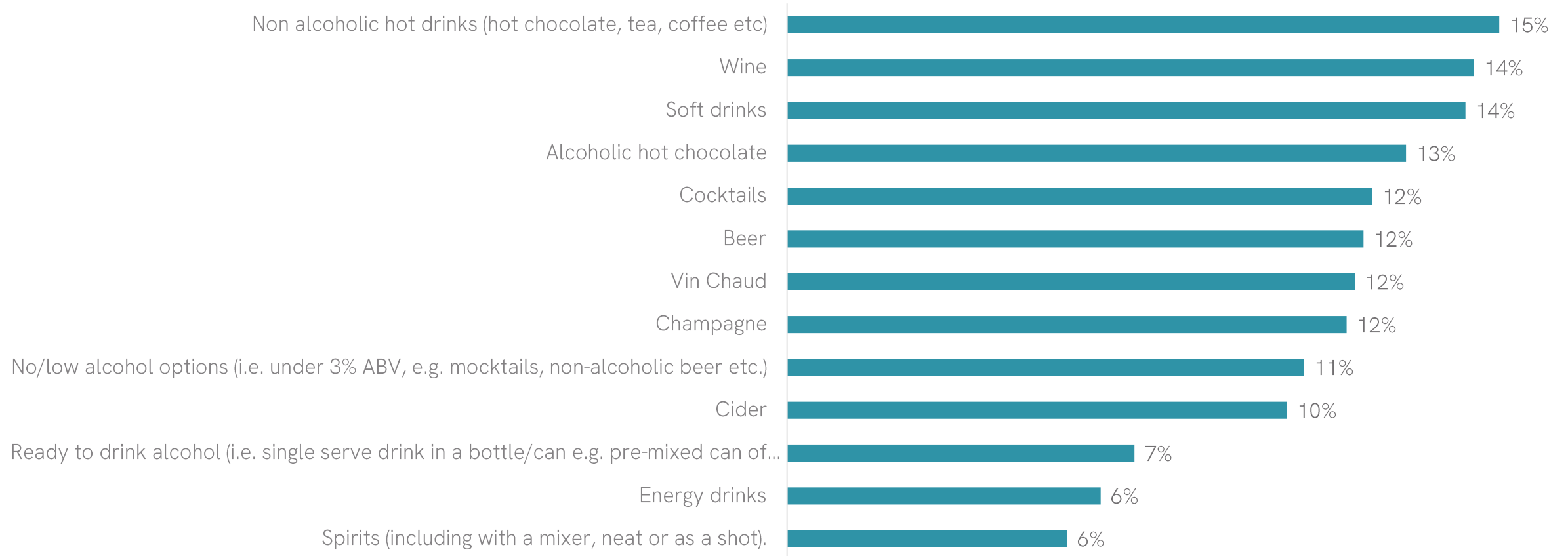
WHICH OF THE FOLLOWING WOULD YOU TYPICALLY DRINK AT A CHRISTMAS MARKET?

Typical drink choice



WOULD YOU CONSIDER DRINKING ANY OF THE FOLLOWING AT A CHRISTMAS MARKET IF THEY WERE AVAILABLE?

Drink choice if available



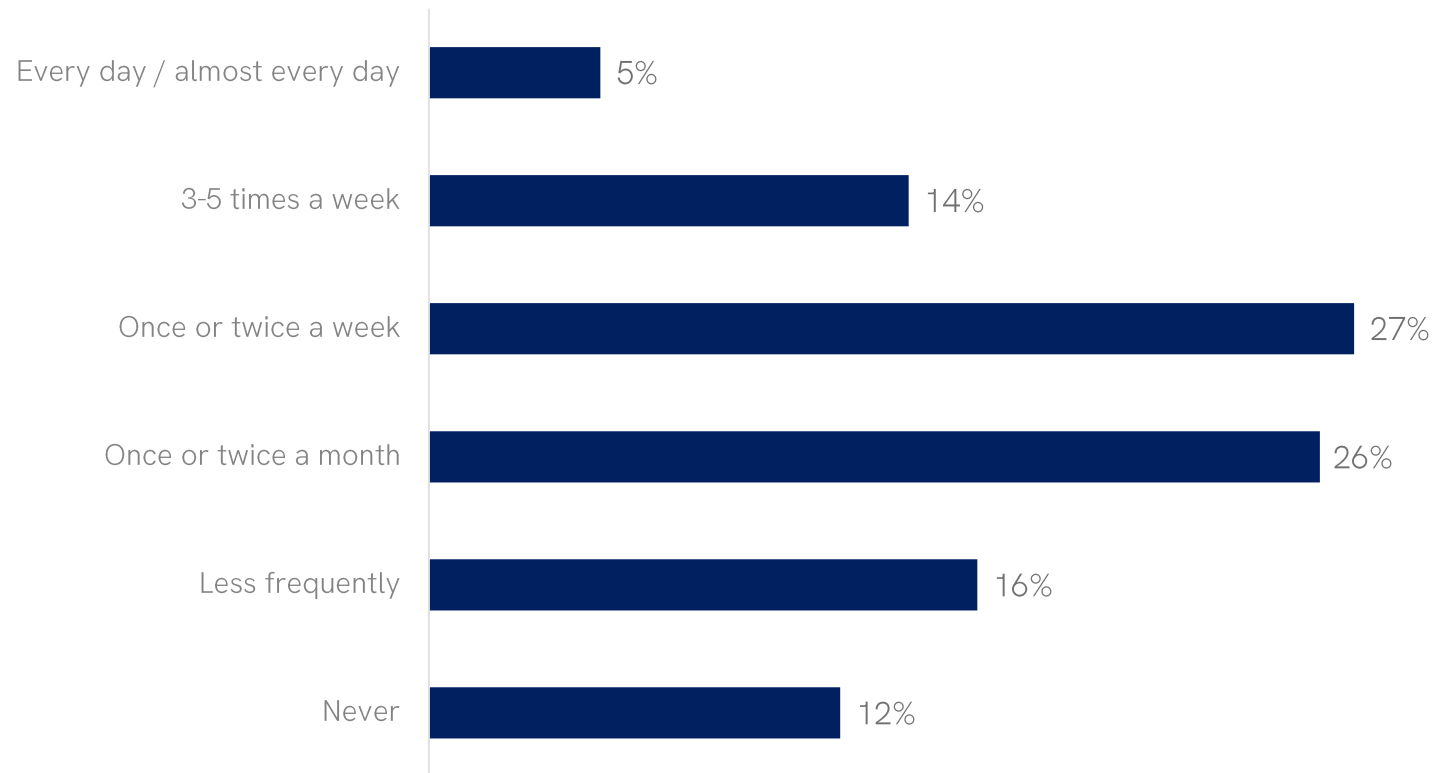
Hot Topic - Coffee



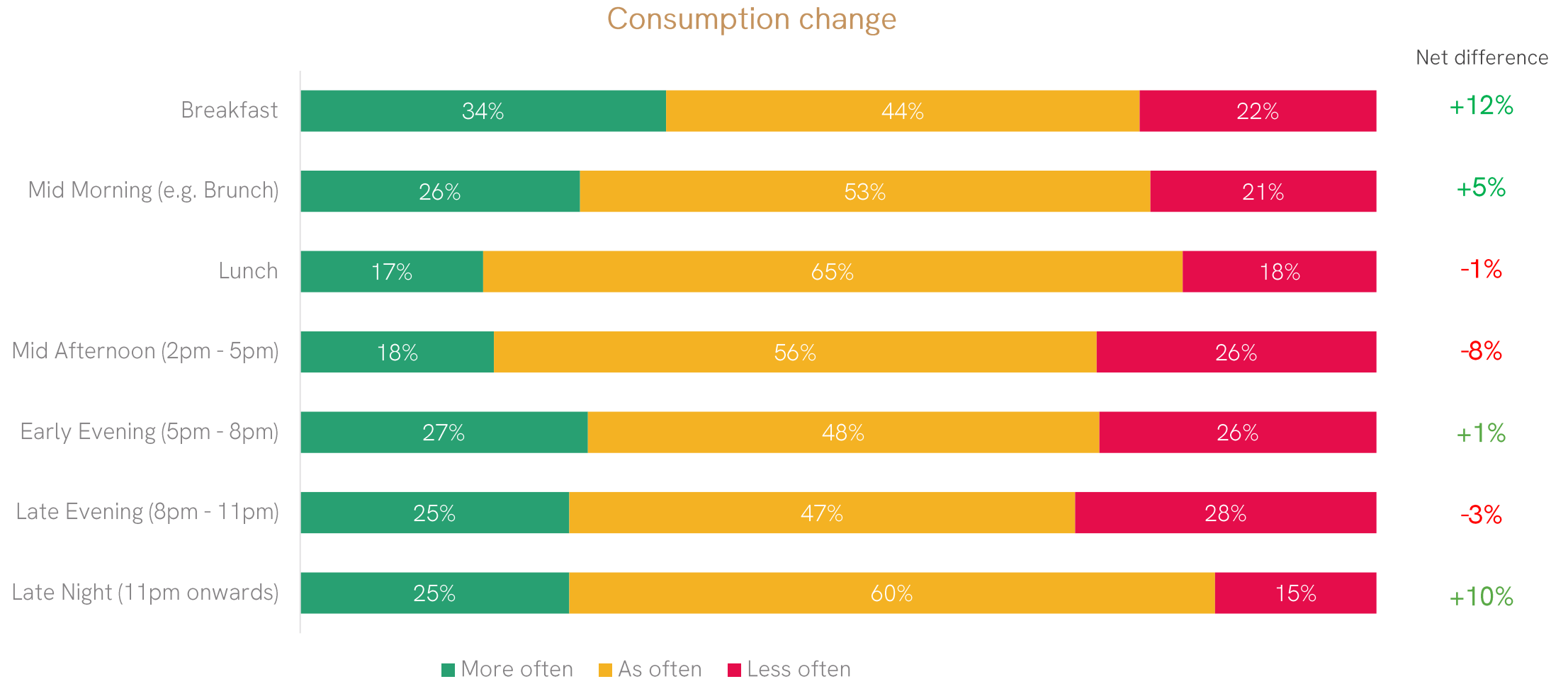


HOW FREQUENTLY HAVE YOU DRUNK COFFEE IN CAFES, BARS, RESTAURANTS OR OTHER SIMILAR VENUES OVER THE PAST THREE MONTHS?

Frequency of Coffee consumption



COMPARED TO ONE YEAR AGO, ARE YOU ORDERING COFFEE MORE OR LESS, AT ANY OF THE FOLLOWING TIMES?



A close-up, slightly blurred photograph of an espresso machine's group head and spout. Coffee is being dispensed into a white cup. The image has a dark blue overlay on the right side where the text is located.

The average consumer is
willing to spend

€ 3.12

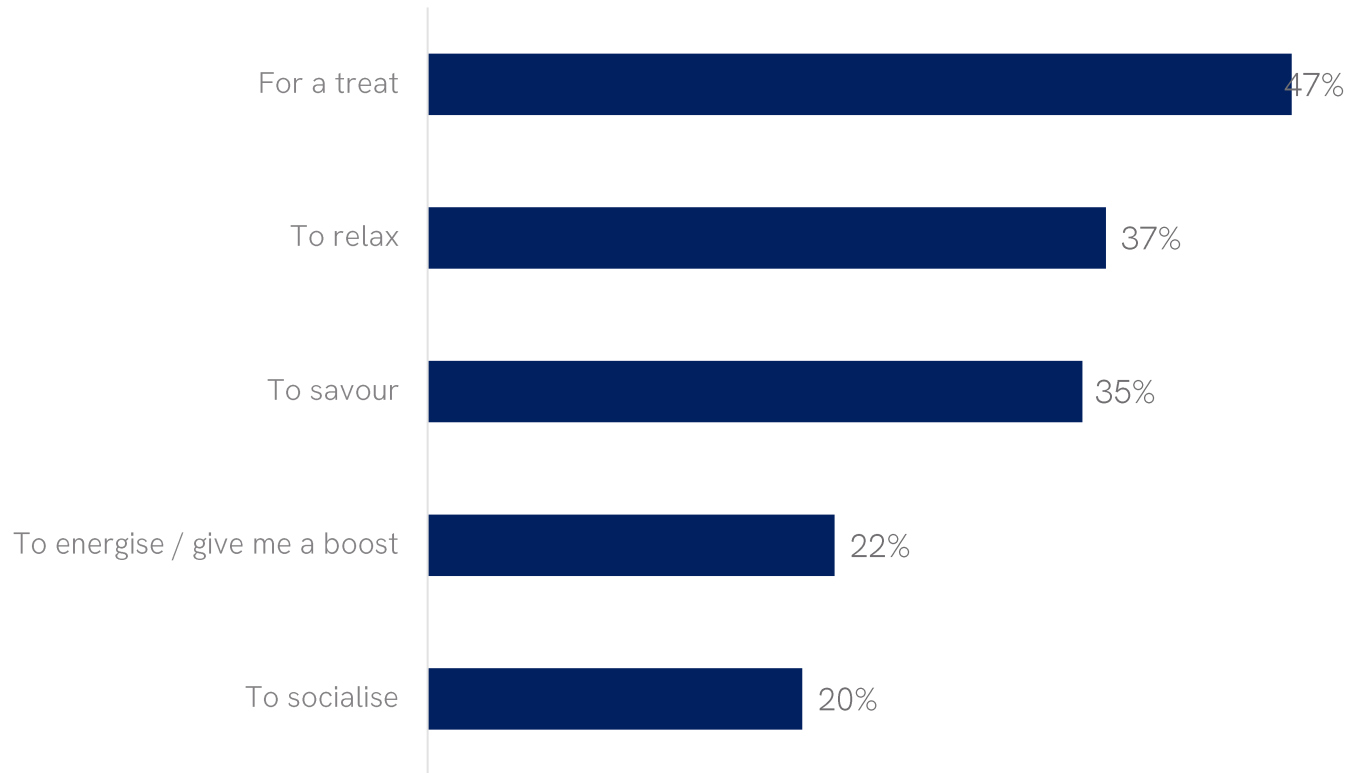
on a Coffee

-€0.72 vs Germany

+€0.49 vs Italy

WHY DO YOU CHOOSE TO DRINK COFFEE WHEN OUT IN BARS, RESTAURANTS AND OTHER SIMILAR VENUES?

Reason for drink choice



Hot Topic – Ready to Drink Alcohol



DO YOU DRINK READY TO DRINK ALCOHOL WHEN OUT IN VENUES SUCH AS BARS, RESTAURANTS OR SIMILAR VENUES?

23% of consumers who don't currently drink RTD's in the On Premise would consider doing so in future

Consumption of RTD's



37%

Drink RTD's when visiting the On Premise



17%

Drink RTD's at home but not in the On Premise



46%

Do not drink RTD's

Want to know more about how global trends are currently impacting the French 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 French 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 French On Premise?



OPUS Select

If you'd like to investigate a more specific topic more tailored to you and your business, 2023 sees 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,
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