

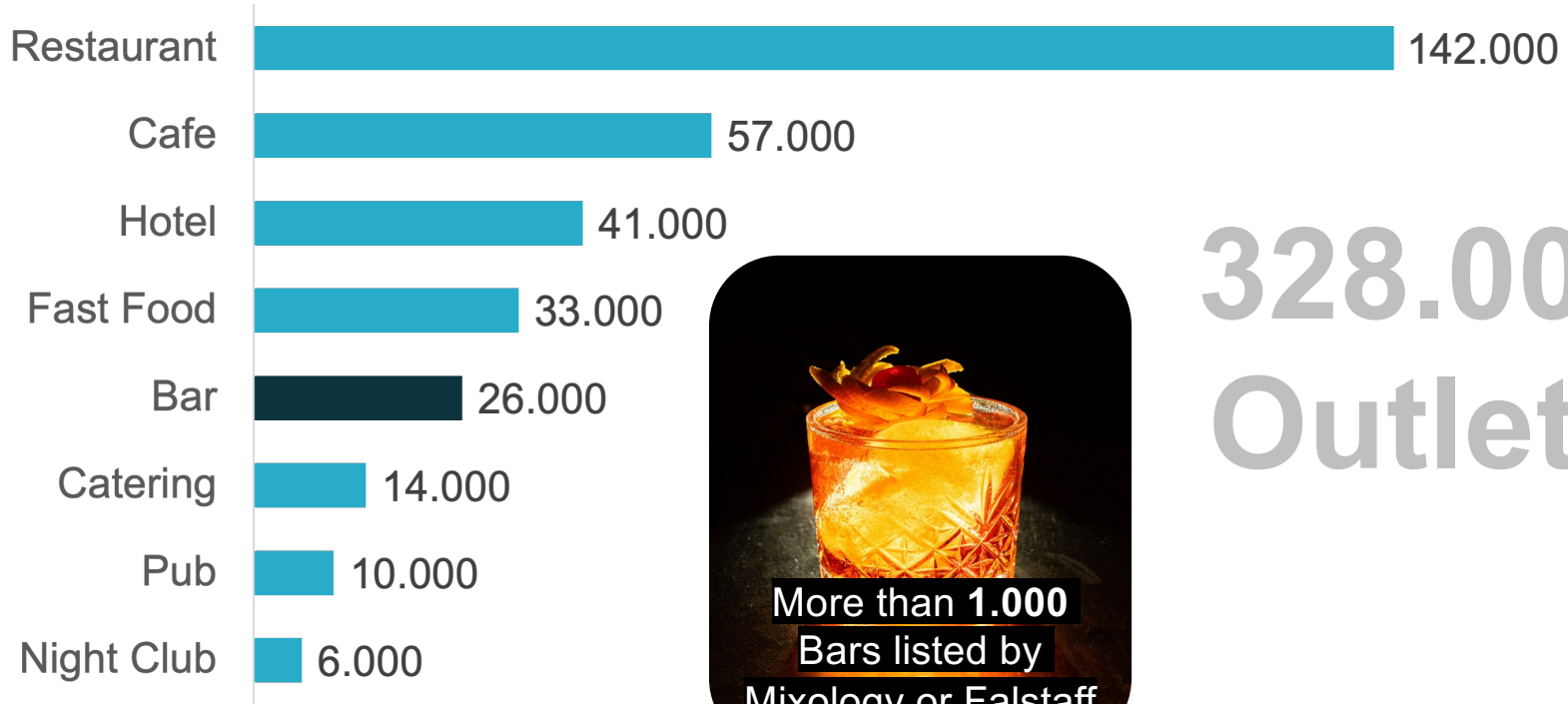
Meeting consumers on-premise in Germany

Bar Convent Berlin 2024

meoton



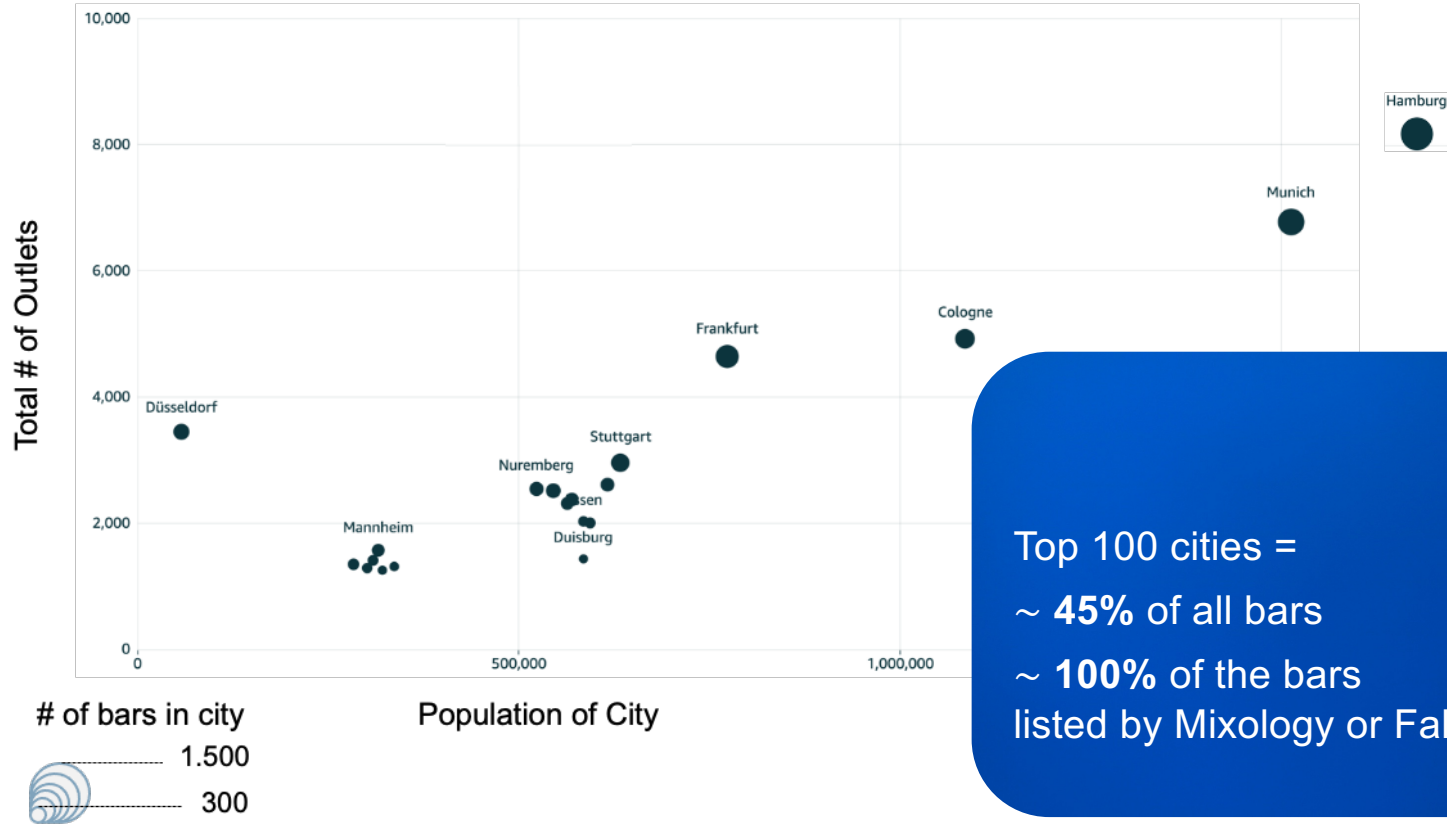
Where to meet consumers on-premise in Germany



328.000
Outlets



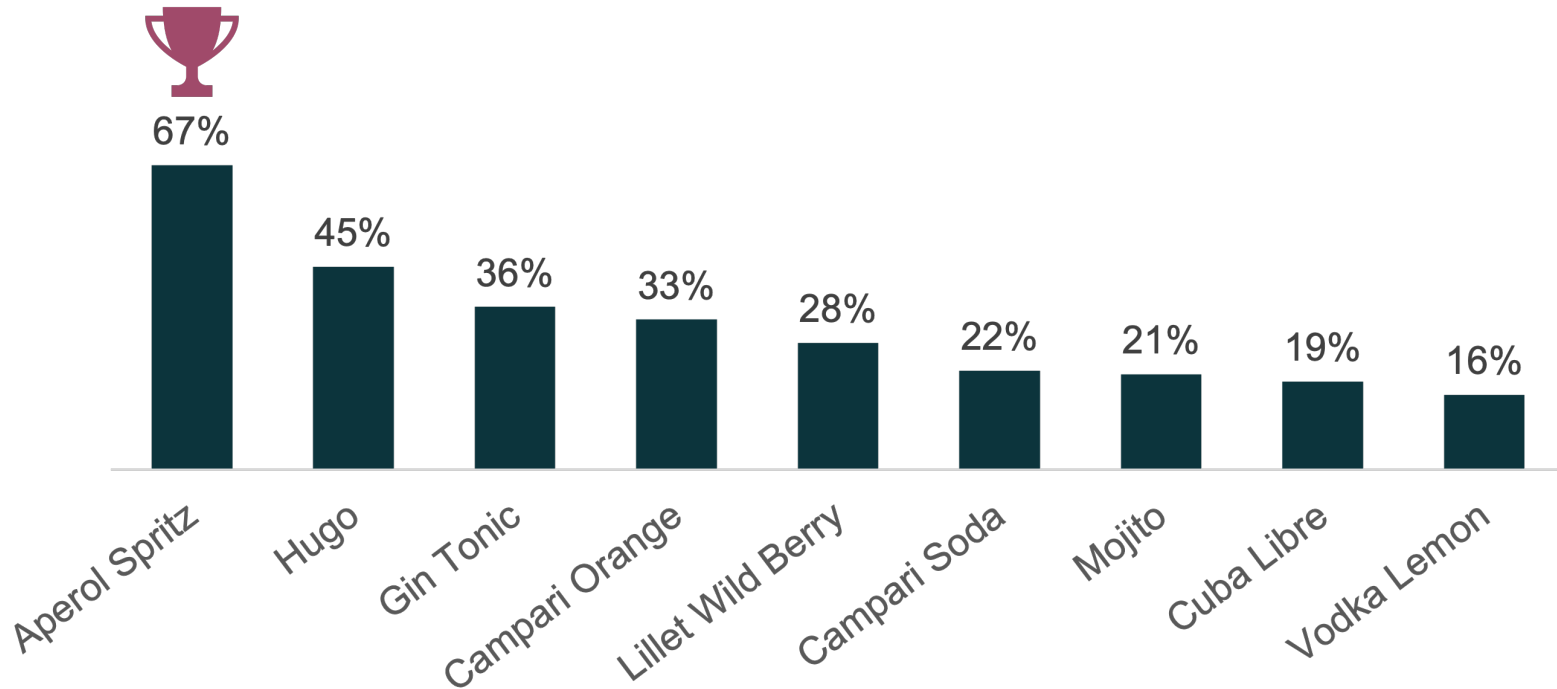
Large cities versus the rest



Top 100 cities =
~ 45% of all bars
~ 100% of the bars
listed by Mixology or Falstaff



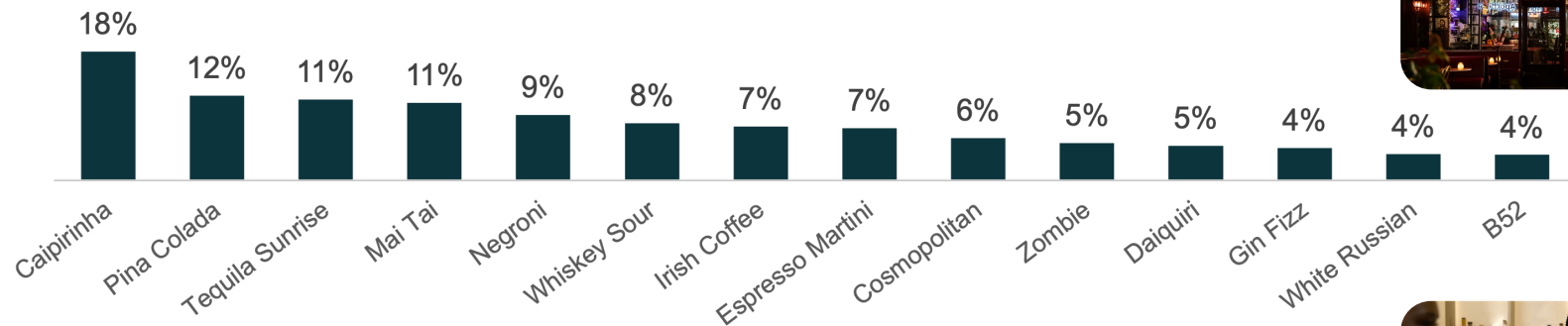
Top listings in Germany – Aperitifs and long drinks



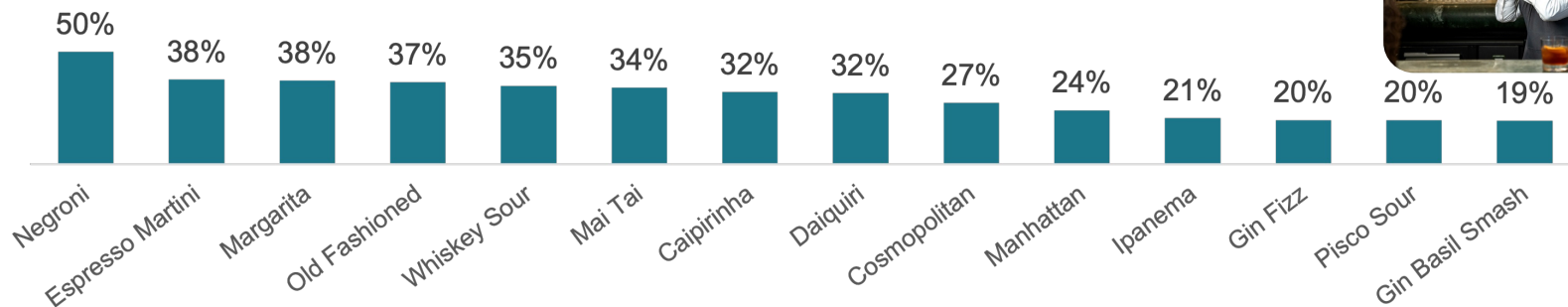
Basis: All outlets Germany listing at least one of the defined aperitifs, long drinks or cocktails; September 2024

Top cocktail listings

All outlets

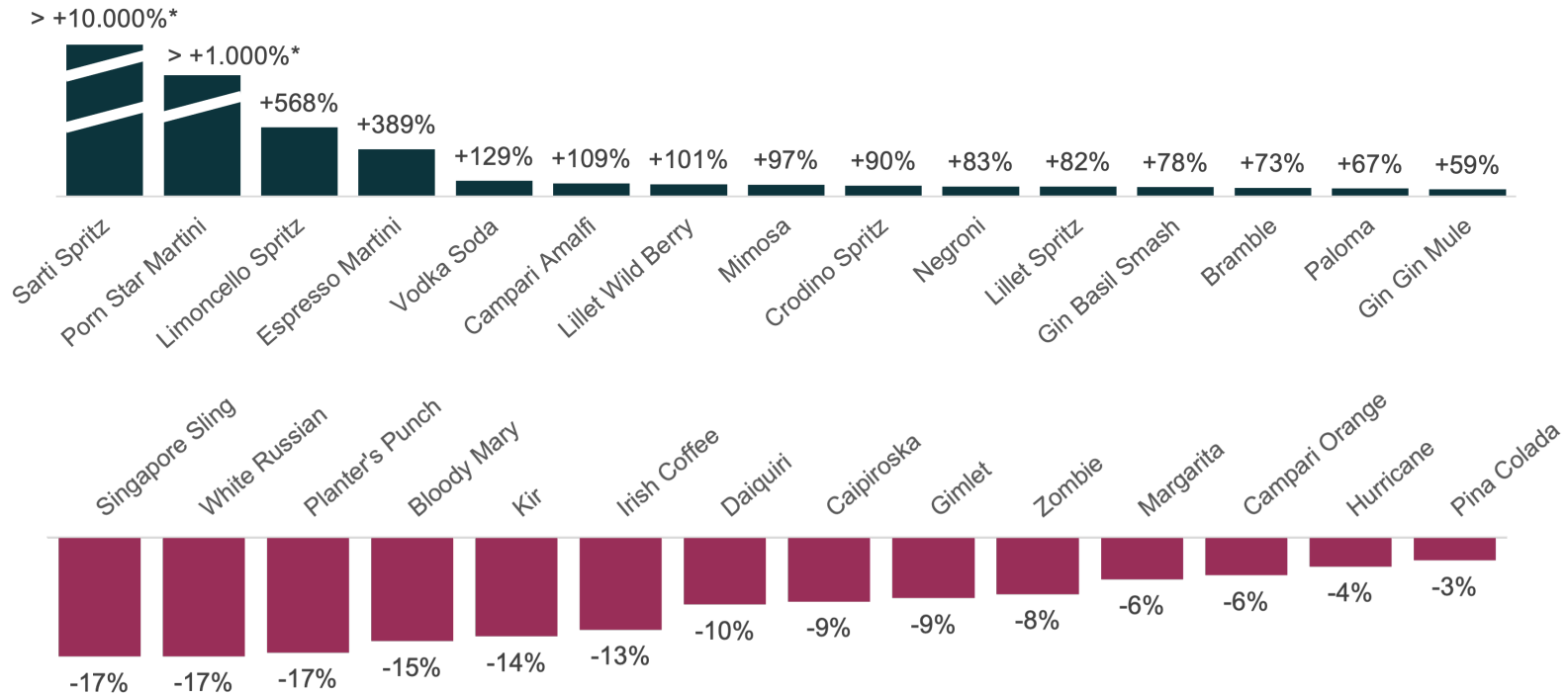


... for bars listed by Mixology or Falstaff



Basis: All outlets Germany versus bars listed by Mixology or Falstaff; % calculated based on all aperitifs, long drinks or cocktails listed; Sep 2024

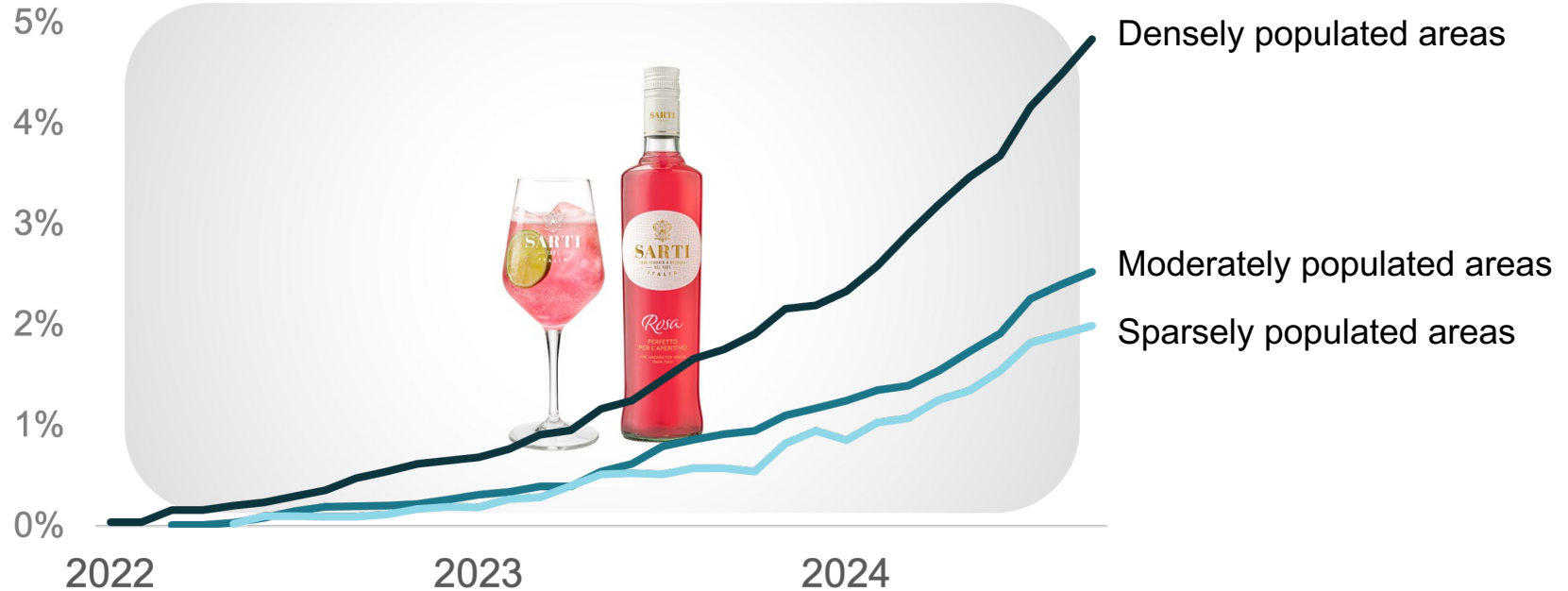
Trends: September 2024 vs. December 2021**



Basis: All outlets Germany listing at least one of the defined aperitifs, long drinks or cocktails; drinks with listing % > = 1% in Sep 2024

(*) Low starting base; (**) Start date December 2021 or first listing of cocktail

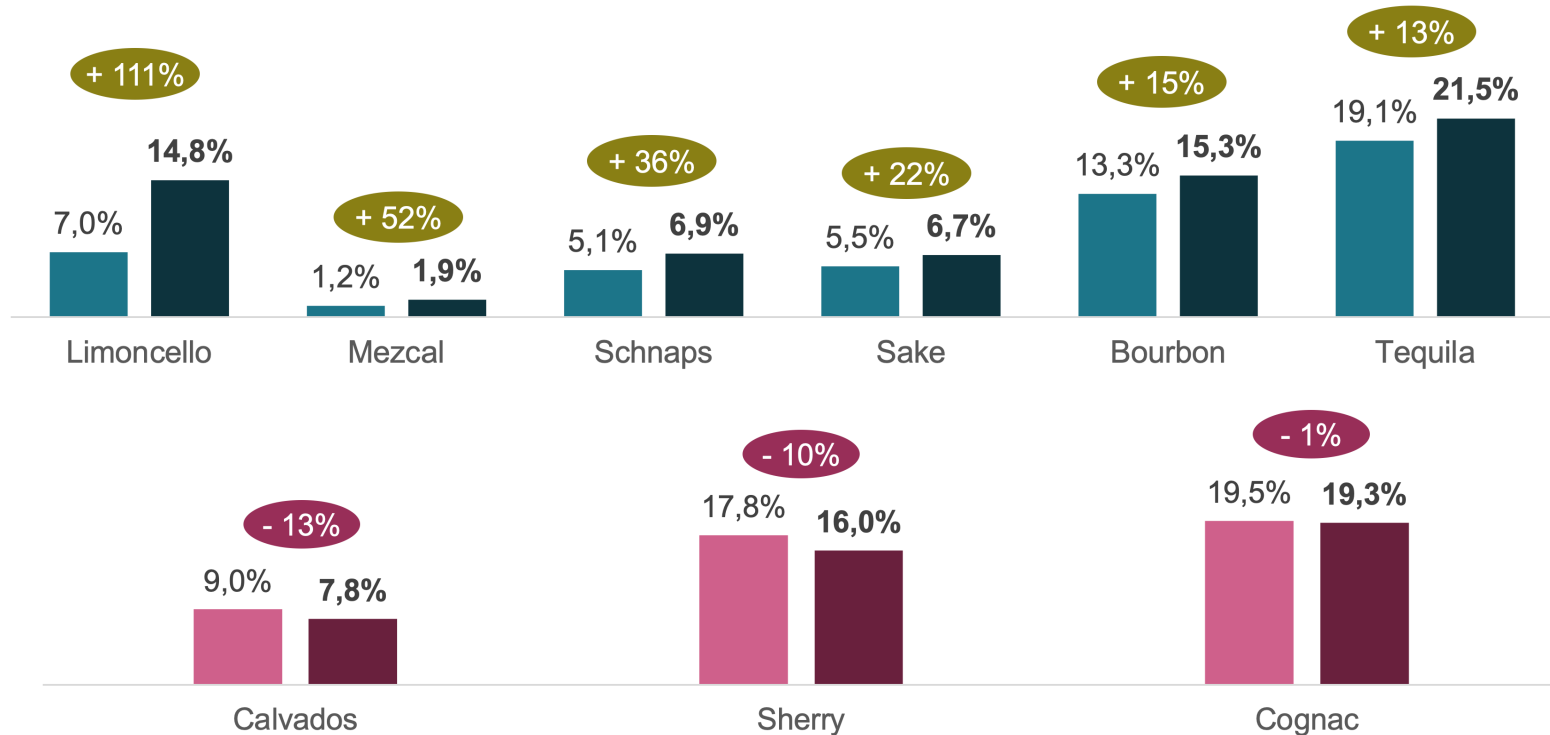
Trends develop in urban areas



...but high regional variations, e.g. in **Leipzig 17% listing** versus 3% for Germany overall

Basis: All outlets Germany; % calculated based on outlets which list any of the defined aperitifs, long drinks or cocktails

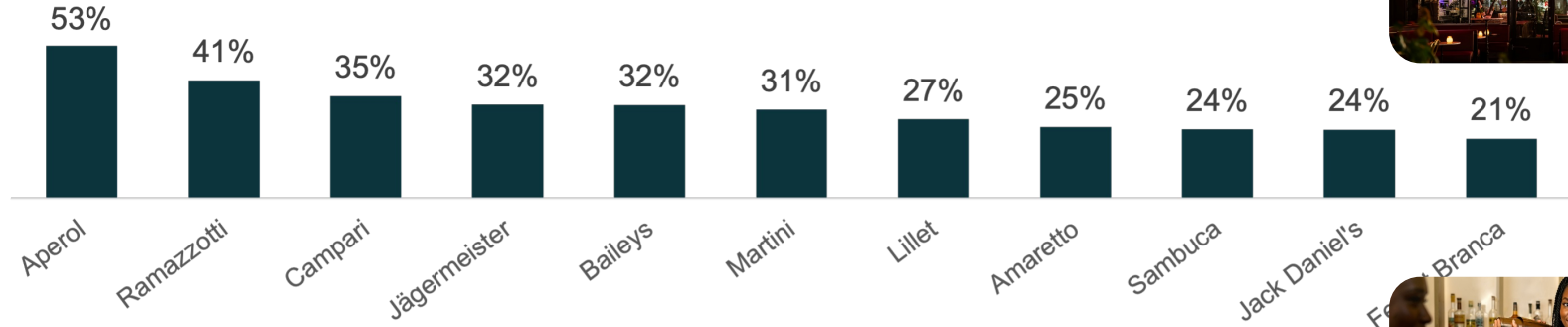
Spirits category trends Sep 2024 versus Dec 2021



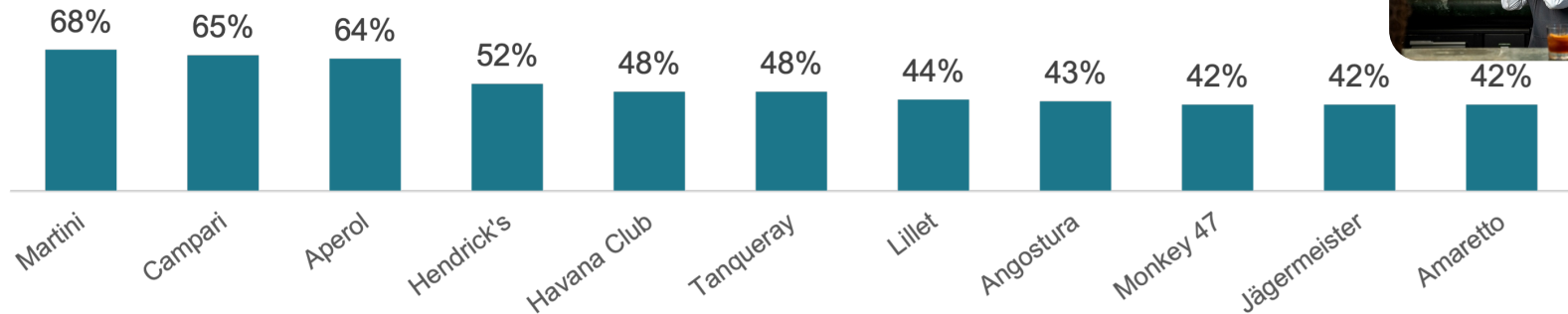
(*) Basis: All outlets Germany; listings September 2024 vs. September 2023

Top spirits brands listings

All outlets

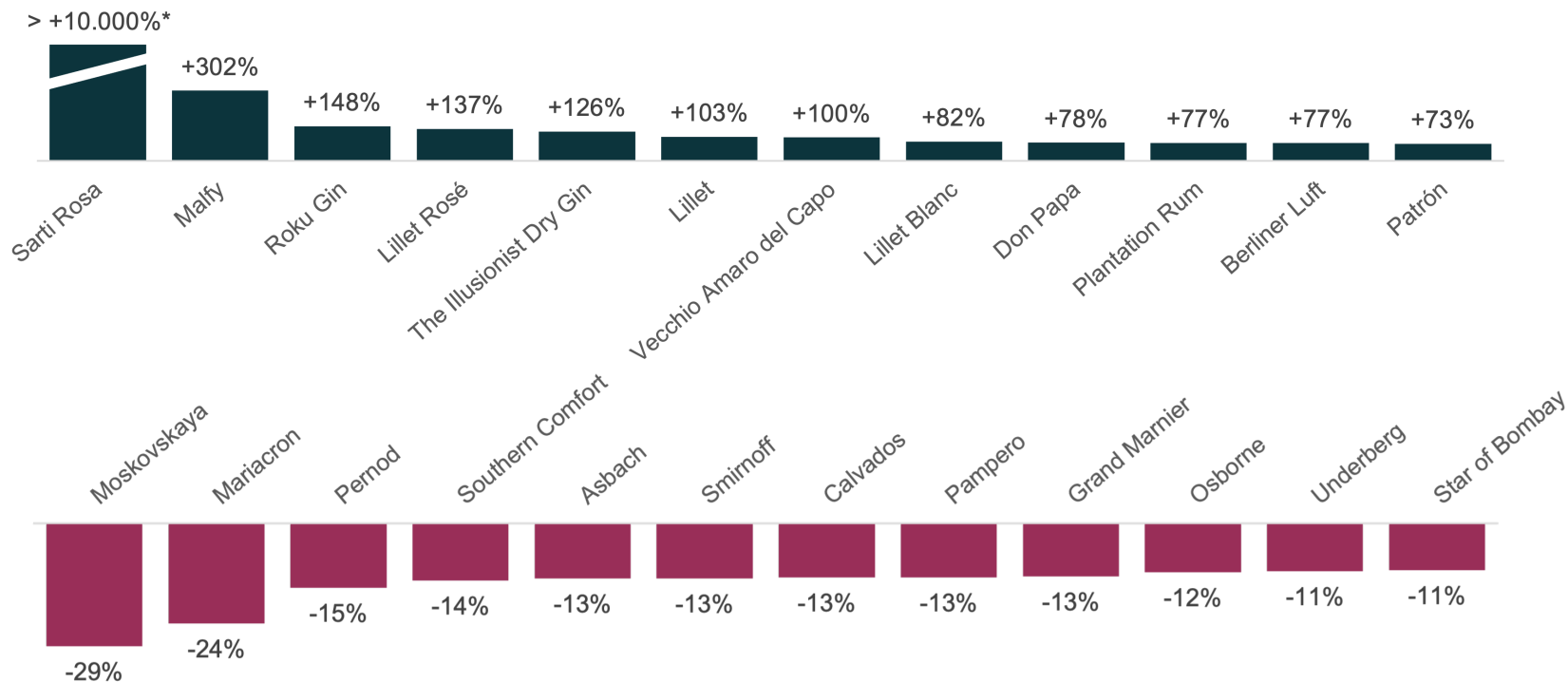


... for bars listed by Mixology or Falstaff



Basis: All outlets Germany versus bars listed by Mixology or Falstaff; % calculated based on all **spirits brands** listed; September 2024

Spirits brands: September 2024 vs. December 2021**

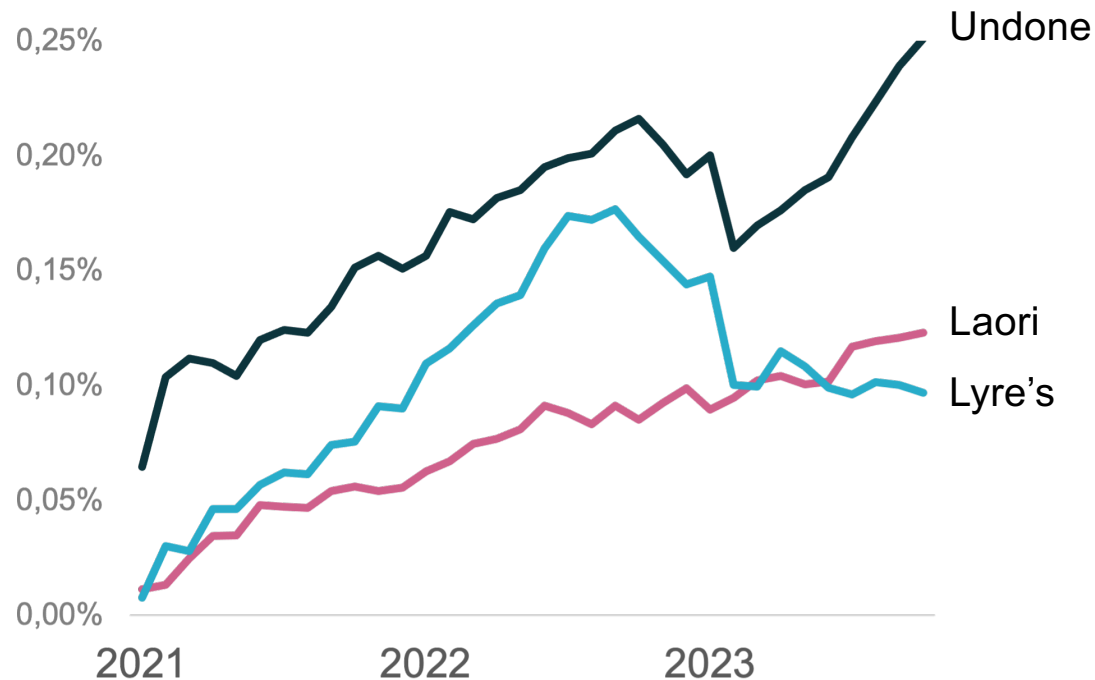


Basis: All outlets Germany versus bars listing at least one of the defined spirits; listing % $\geq 1\%$ in Sep 2024

(*) Low starting base; (**) Start date December 2021 or first listing of spirit

Alcohol-free spirits brands

Listing

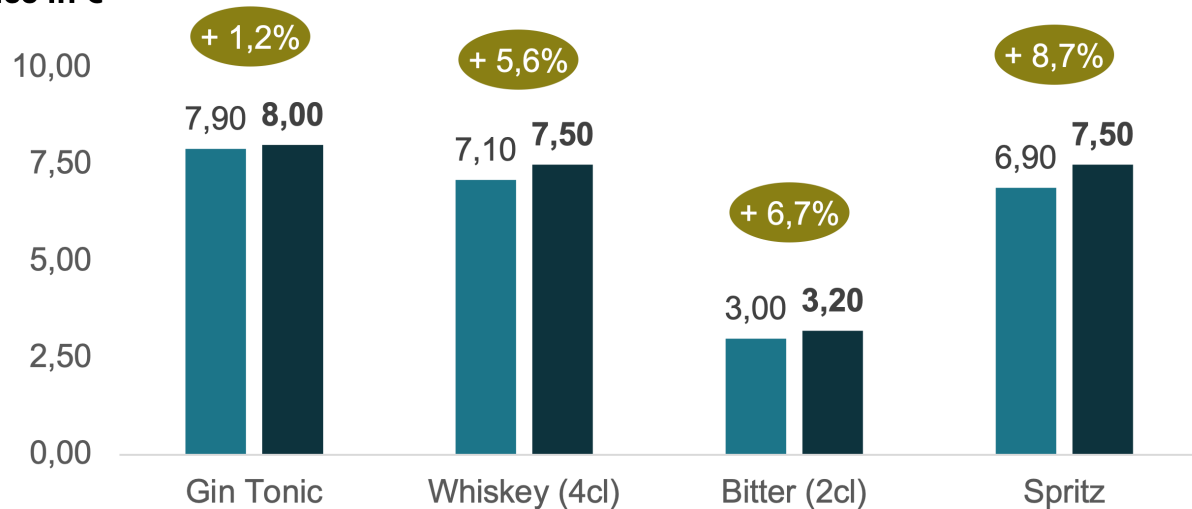


Basis: All outlets Germany listing at least one of the defined aperitifs, long drinks or cocktails



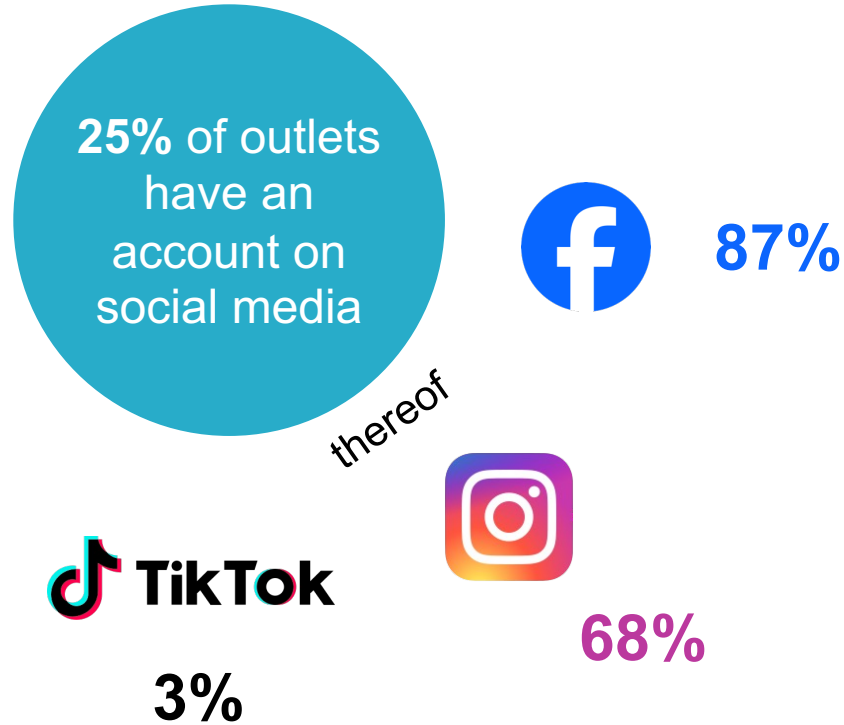
Prices and changes over last 12 months*

Price in €

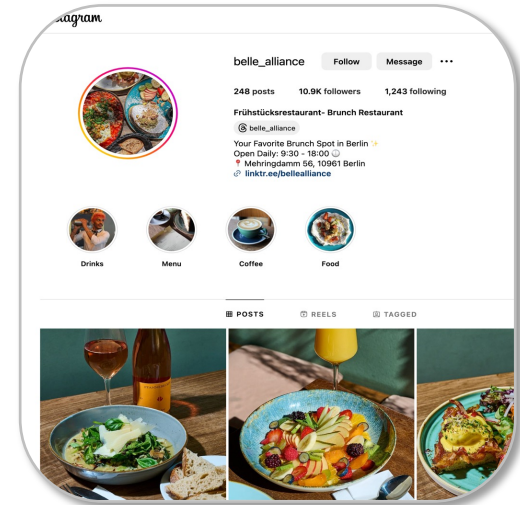


(*) Basis: All outlets Germany; prices September 2024 vs. September 2023

Social media as a channel for outlets and consumers



Of the bars listed by Mixology or Falstaff
> **60%** have an account on social media



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