

# CGA by NIQ 2024 Channel Strategy Study

Maximizing beverage opportunities across key  
On Premise channels by exploring consumer needs and  
behaviors in different venue types



# Channel Strategy Study 2024

CGA by NIQ are launching the Channel Strategy Study focusing on the US market for 2024, following significant demand and feedback from clients.

The study will build on the effective structure used in 2023, to provide invaluable insights for suppliers on where opportunities for their brands/categories lie and how tailored strategies for specific channels are essential to win.



# Identifying the most valuable channels for your brands and categories

The 2024 Channel Strategy Study report gives vital insights to succeed in each of the 11 channels covered.

Understanding how different **brands** and **categories** perform across particular visit types and consumer motivations is vital for supplier success. We know these factors vary significantly by channel.

Insights from the Channel Strategy 2024 report will allow you to **focus your resources** and **ensure strategies are tailored** correctly to different venue types to **maximize ROI**.

Within the study outputs, **year-on-year trends** will be pulled out where relevant; providing insights into how consumer behavior has changed over time. This can act as a foundation to understand if your existing market plans are effective or need adjustments to be made.

## Report benefits:

- ✓ Identify clear and actionable opportunities across the On Premise space for your brands
- ✓ Give suppliers key insights, acting as a catalyst for the development and execution of effective marketing and tailored strategies relevant to a particular channel
- ✓ Provide key insights into consumer behaviors across each of the 11 channels explored.



# Which channels are covered within channel strategy 2024?

The core report will help you **understand the opportunities** available across **11 specific channels**. Accompanying individual deep dive reports will help you maximize possibilities within each channel to **shape tailored strategies** at a specific channel level:



# The Channel Strategy 2024 report will provide you with...

- ✓ A **detailed understanding of key channels** underpinning the On Premise sector, **facilitating nuanced planning and execution**
- ✓ A holistic view indicating the **size of the prize** for each of the channels covered
- ✓ Evidence to show **clear opportunities** within each channel
- ✓ A breakdown of **who each channel's key consumers are**, including their attitudes, preferences and behaviors
- ✓ Exploration of a customer's **path to purchase** and what influences this
- ✓ A complete understanding of **what is important to the channel experience**, including **key occasions** to focus on to drive engagement and sales
- ✓ **Brand awareness and preferences in each channel** to ensure you can maximize penetration of your brand

# #1: The Core Report *designed for Channel Strategy Development*

The core report provides a holistic overview of different channels which form parts of the wider On Premise.

The comprehensive overview allows Insight teams to fully understand the most prevalent consumer profiles in each channel; which channels are most important/valuable for your brands and where your resource and planning should be focused on.

## Quantifying the size of the prize

- What is the share of visits to the On Premise overall that different channels account for?
- How often do consumers visit each specific channel?
- How frequently is a category consumed in a specific channel to understand total serves?

*This will establish which channels provide the most promising sales opportunities and avenues for growth to match your portfolio of brands*

## Understanding the target consumer profile per channel

- What are the key characteristics of consumers for each channel in demographic areas, as well as how they align and differ attitudinally in relation to experimentation, brand loyalty, receptiveness to premium offerings, etc. ?
- What occasions are consumers most commonly visiting a specific channel for and what drink categories are consumed during these visits?
- What are the most important elements of a drinks offer that consumers are looking for in each channel?

*This will establish which channels provide the best opportunity for the brand/product in terms of alignment with the key target consumer in that channel*



## #2: Channel Deep-dives

to facilitate building *specific* strategies

Once the most important channels for your brand portfolio have been identified, the second set of deliverables will enable Brand, Marketing and CP&A teams to explore the detail within a specific channel to further focus strategies.

These individual, low cost, channel reports will provide granular insights into each channel's key dynamics to inform strategy and planning, uncovering how to position your brands most effectively against competitors.



# Key questions

## What are consumers drinking within a specific channel?

- How do different drink categories perform relative to one another?
- Within a category, what sub-category proves most popular?
- What serve preferences do consumers have across a range of categories?
- How can emerging categories capitalize on specific channels?
- Where do non-alc options fit alongside BevAl brands?
- What dayparts are key?
- Which categories and types of drink do better during different times of day?
- How valuable is happy hour?
- Is the naming of brands important in specific cocktails or mixer drinks?
- On average, how many drinks are being consumed in the channel per visit?
- How prevalent is category switching?

## What is your brand penetration in this channel?

How popular are your brands in a channel relative to your competitors?

## What is driving consumer visitation?

This will be tailored to specific channel specific scenarios.

For example:

- How important is the range of options available to neighborhood bar visitors or local brand availability in fine dining restaurants?
- How important is drinks quality, promotions, word of mouth, different touchpoint areas or previous experience in driving visitation?

## How are drink choices made?

Are high quality ingredients influential, is food pairing key, is the brand/drink's origin important, do recommendations play a role?

## What is important to the overall channel experience for consumers?

What elements create the ideal experience for someone in that channel – promotions, clear menus, presentation of food/drinks, premium drink options?

This will establish the opportunities available for your brands and how to most effectively market new and existing offerings within specific channels



# What's new for 2024?

It is essential that the topic areas covered by our channel strategy project incorporate the evolution of both specific channels and across the On Premise more generally. To take account of this, several new elements have been added to this year's study:

## Expanded drink categories and brand lists

- An increased list of brands included for all drink categories to allow further insights into behaviors of specific brand consumers
- An expanded focus on non-alc, energy and soft drink consumption by channel to understand the dynamic this plays alongside BevAI choices

## Neighborhood bars added as a channel

- With clear opportunities for brands and distributors to collaborate with this channel, we have added this deep-dive for 2024 to understand consumer needs and behaviors in this space, including an exploration of college-themed bars within this
- We have also expanded the definition of other channels such as nightclubs to high-tempo venues (to account for the rising popularity of dayclubs) and premium bars to become premium cocktail & mixology bars

## Further exploration of channel nuance

- As much core content across the survey has remained as consistent as possible to allow for direct comparisons between venue types
- However, there is a renewed focus on incorporating specific content that accounts for unique elements of each channel included to allow for the most pertinent insights. This includes understanding usage of touchpoint areas (e.g. rooftop bars or patios) and cuisine types consumed in food-led channels (to understand food pairing opportunities)

## Enhanced ways to explore and understand the data

- As well as core demographic questions, the 2024 study also includes the ability to cut data by psychographic factors, giving an understanding of consumer behavior by different drinker types beyond more traditional metrics

# Additional key information

## METHODOLOGY:

- + Online quantitative survey
- + Focusing on 11 specific On Premise channels
- + 7,500 consumers who plan on visiting the On Premise in the next 3 months (ensuring a robust base of respondents for all channels explored)

## FIELDWORK & OUTPUTS:

- + The survey will field during September
- + Core report to be available in October
- + 11 individual channel deep-dive reports will be delivered across October and November
- + Option to unlock full data set in Distilr 360

# Contact us

To learn more or speak to a member of the team, please feel free to get in touch:



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