

Understanding the On Premise Spirit & Beer Consumer in Southeast Asia

NIQ



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Introducing OPUS: On Premise User Survey

Unveiling Key Aspects of Consumer Interaction for Informed Decision-Making



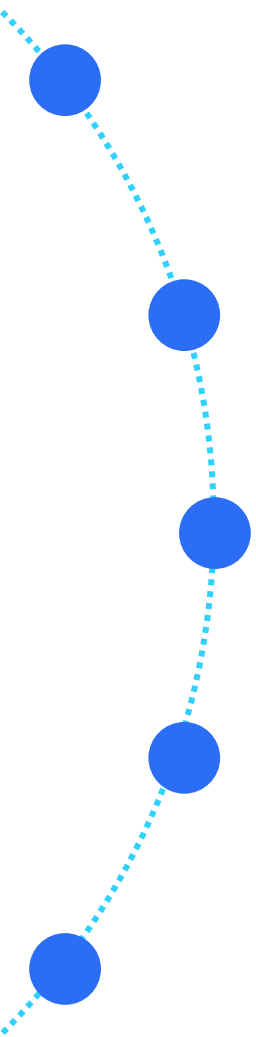
Extensive Global Presence

Offering a panoramic view of On Premise market trends, OPUS engages users in 20 countries worldwide: USA, Canada, Mexico, UK, Ireland, France, Italy, Germany, Netherlands, Japan, South Korea, Vietnam, Taiwan, Malaysia, Indonesia, Philippines, Thailand, Singapore, Australia & New Zealand



Trusted by clients across the globe

OPUS is a trusted resource embraced by clients globally for its ability to provide foundational insights into consumer interactions with the On Premise channel. OPUS empowers businesses with the knowledge they need to make informed decisions and stay ahead in the competitive market.



Get actionable consumer intelligence with precise insights and create revenue-boosting strategies.

Become On Premise category champion by understanding shifting consumer preferences.

Use tailored market representation so you can unlock untapped revenue opportunities.

Optimize your category and shape drink choices, attract consumers, and increase their satisfaction.

Justify stocking decisions by proving market demand with real insights and gain a competitive edge

How, When, Where and Why?

*Explore the full On Premise
consumer experience and
behaviors*

Shape your brand, marketing & sales strategy around the most profitable On Premise visits with OPUS

OPUS gives you the power to understand the ever-changing relationship between *consumers, brands, categories, channels* and *occasions*. It tells you not just what people think about your Spirits offerings and your competitors' products but reveals *how* and *where* they interact with them and most importantly, *why*.



Quantify visits
and spend in
On Premise



Uncover size
of the prize
opportunities
for categories
and brands
by occasion
& channel



Explore
consumer
reasons for visit,
need states
& path to
purchase



Deep dive
into consumer
interactions
with drink
categories

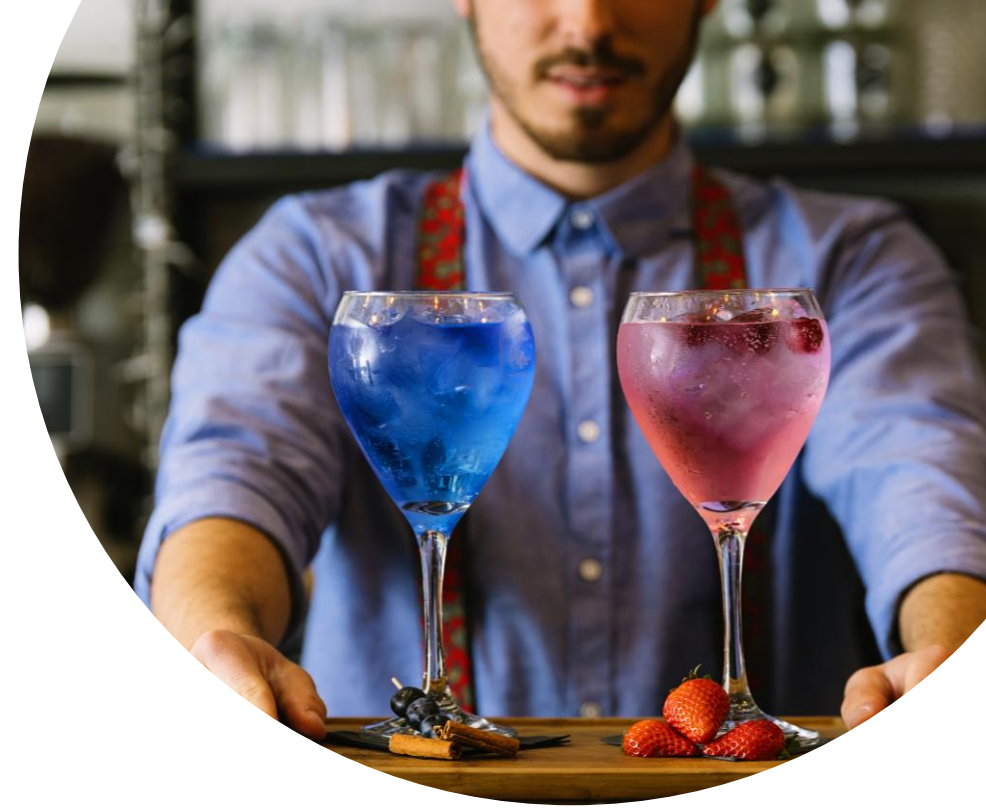


Track favourite
brands,
flavours and
serves

All findings can be broken down by drinks brand consumers and consumer demographics

A Flexible Path for On Premise Success!

Depending on where you are in your On Premise journey, you can start with a simple category overview and scale as you grow. Or go in-depth from the start and find ways to refine your strategies.



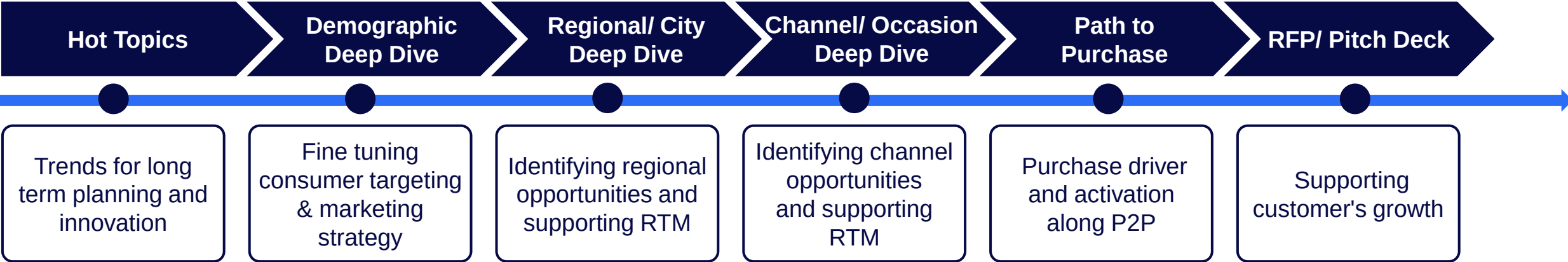
Your On Premise Journey



Go beyond growth! *Learn to anticipate trends and create innovative strategies by using consumer deep dives*



Your On Premise Journey





OPUS Spirits

- + Indonesia: Examining 2,003 spirits drinkers in Jakarta, Bali, and Surabaya's On Premise for insights into their habits and preferences.
- + Philippines: Surveying 1,501 city centre-based spirits drinkers in Manila, Quezon City, Davao City, and Cebu City to gain category insights for International spirits.
- + Thailand: Gathering data from 1,250 spirits drinkers in city centres, including Bangkok, Pattaya, Chiang Mai, and Phuket, focusing on On Premise outlets.
- + Malaysia: Analyzing a sample of 1,420 spirit drinkers in On Premise settings, with splits for Kuala Lumpur, Ipoh, Malacca City, and George Town.
- + Vietnam: Investigating 2,000 spirits drinkers in Hanoi and Ho Chi Minh's On Premise, emphasizing city centre consumers.
- + Singapore: Surveying 751 spirits drinkers in the On Premise, particularly those who frequent On Premise establishments.

An online study spanning 6 countries and more than 8,000 consumers, targeting vital consumers for strategic insights in the most important cities to build winning strategies



Understand the Spirits Consumer with On Premise User Survey



Category

- Types of Spirits purchased
- Frequency drinking Spirits
- How knowledgeable consumers believe they are about Spirits
- Types of Spirits consumed at home
- Frequency drinking Spirits at home



Habits

- Spirits drinking dayparts
- Spirits consumption channels
- Spirits consumption occasions
- Whether brand is specified when ordering Spirits



Preferences

- Style of spirits serves typically consumed
- Style of spirit serve consumed by channel
- Likelihood of ordering spirits by the bottle in channels



Path to Purchase

- Reasons for infrequent Spirits consumption
- Motivations or need states for drinking Spirits
- Key factors in choosing a particular Spirits brand
- Consumer perception on what makes a good quality Spirit



Trading Up

- Likelihood of trading up to a more premium Spirit
- What factors encourage consumers to trade up in the Spirits category
- Consumer expectations when choosing premium Spirits options



Brands

- Spirits Brands would typically drink
- Spirits brands purchased in the past 3 months
- Spirit brands would typically drink by the bottle in channels

Whilst strategy should focus on higher tempo occasions which spirits are already consumed on, there is headroom for growth on lower tempo occasions, such as relaxed quiet drinks and casual meals

Which of the following occasions would you typically go out for and **have drinks**?

#1	#2	#3	#4	#5	#6	#7	#8
Relaxed / quiet drinks	Casual meal	Special occasion	After work drinks	Formal meal	Business occasion / meeting	To watch live sports	High tempo drinks
							
44%	41%	40%	32%	26%	23%	21%	20%

Primary occasions share of visits:

18%	19%	12%	15%	11%	9%	9%	8%
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Ranking likelihood of consumers ordering spirits on these occasions:

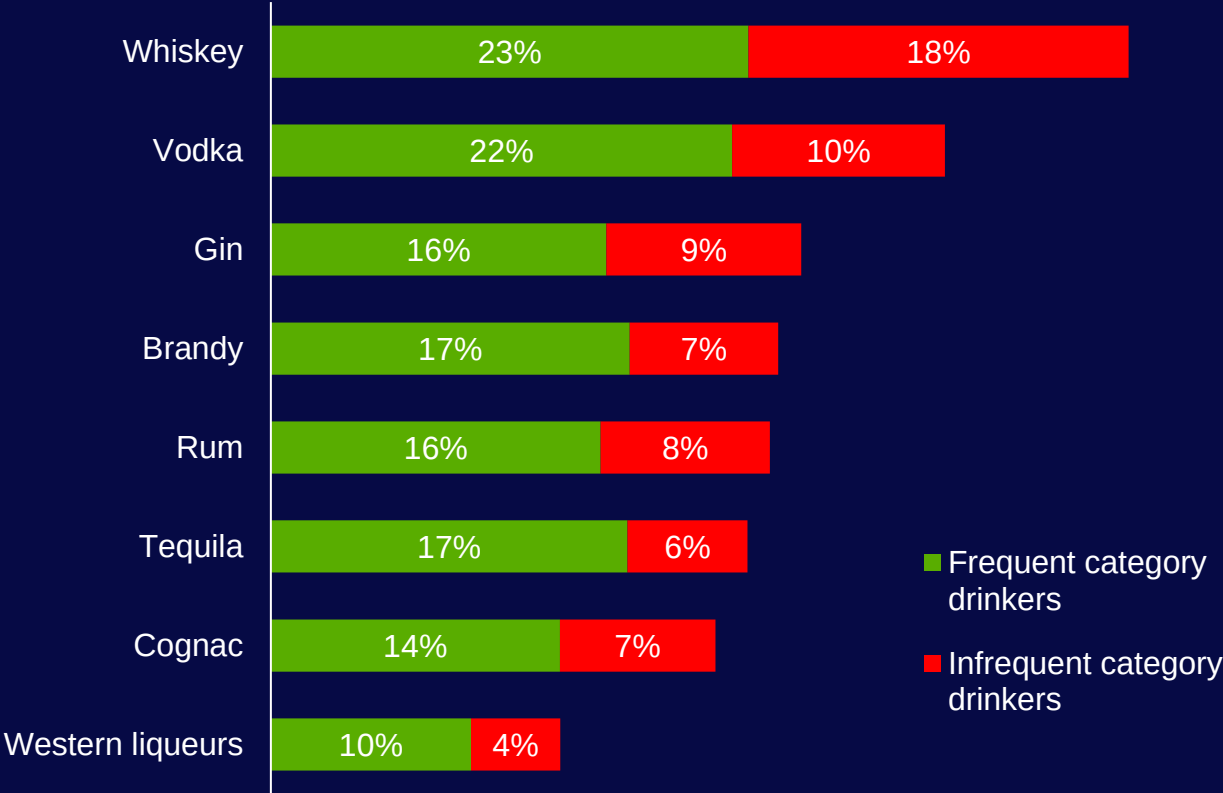
#8	#7	#6	#5	#4	#3	#2	#1
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Source: CGA OPUS SEA – Indonesia Dec24, sample size: 2003.

Those who purchase spirits tend to do so often, but infrequent category drinkers have higher expectations and are looking for drinks that are high quality and distinct

SAMPLE SLIDE

How frequently do you drink the following drink categories when visiting bars, restaurants, clubs or other similar venues?



Top 5 qualities *infrequent spirits drinkers* are looking for in the drinks they purchase:
Indexed vs frequent spirits drinkers

#1	High quality	+13pp
#2	Fresh	+5pp
#3	Unique	+7pp
#4	Authentic	+10pp
#5	Premium	+5pp

Source: CGA OPUS SEA – Singapore Dec24, sample size: 104 – 307.
Infrequent spirits drinkers 316. Frequent spirits drinkers 555.

*Frequent category drinkers – drink this category “every time”, or “almost every time” when out.
*Infrequent category drinkers – drink this category “occasionally/ sometimes”, or “hardly ever” when out.

To distinguish from competitors and drive premiumisation, offer consumers something unique to your brand and communicate the origin of your ingredients to elevate brand perception

SAMPLE SLIDE

Which of the following factors encourage you to pay extra for a better-quality whisk(e)y?
Vs SEA average

#1	#2	#3
Distinct / unique flavour	Use of higher quality ingredient in production	Brand reputation / legacy
39% +7pp	31% +6pp	30% =0pp
How to achieve these:		
Innovate with new flavour profiles and launch rare, limited edition product variants with new and interesting flavours to create a sense of exclusivity and added value for money	We know that consumers rely on the menu, therefore capitalise on this and use the menu as a tool to convey your products quality	Elevate brand reputation through investing in bartenders, ensuring that they are well educated on your brand/prouducts

Source: CGA OPUS SEA – Thailand Dec24, sample size: 456, SEA average: 1690



OPUS Beer

- + Indonesia: Examining 1,120 consumers in Jakarta, Bali, and Surabaya's On Premise for insights into their habits and preferences.
- + Philippines: Surveying 1,166 city centre-based consumers in Manila, Quezon City, Davao City, and Cebu City to gain category insights for International beer.
- + Thailand: Gathering data from 1,019 beers drinkers in city centres, including Bangkok, Pattaya, Chiang Mai, and Phuket, focusing on On Premise outlets.
- + Malaysia: Analyzing a sample of 751 beer drinkers in On Premise settings, with splits for Kuala Lumpur, Ipoh, Malacca City, and George Town.
- + Vietnam: Investigating 1,382 beer drinkers in Hanoi and Ho Chi Minh's On Premise, emphasizing city centre consumers.
- + Singapore: Surveying 506 beer drinkers in the On Premise, particularly those who frequent On Premise establishments.

An online study spanning 6 countries and more than 5,000 consumers, targeting vital consumers for strategic insights in the most important cities to build winning strategies



Understand the Beer Consumer with On Premise User Survey



Category

- Types of Beer purchased – Lager, Craft, Ale, Stout
- Frequency drinking Beer
- How knowledgeable consumers believe they are about Beer
- Types of Beer consumed at home
- Frequency drinking Beer at home



Habits

- Beer drinking dayparts
- Ways to encourage later Beer consumption
- Beer consumption channels
- Beer consumption occasions
- Beer ordering behaviors by channel and preferences



Preferences

- Whether brand is specified when ordering Beer
- Preferred Beer strength
- Beer format purchased (draught, bottle, can)
- Preferred Beer format & reasons for those preferences



Path to Purchase

- Reasons for infrequent Beer consumption
- Motivations or need states for drinking Beer
- Key factors in choosing a particular Beer brand
- Consumer perception on what makes a good quality Beer



Trading Up

- How likely are consumers to trade up
- What factors encourage consumers to trade up in the Beer category
- Consumer expectations when choosing premium options and trading-up

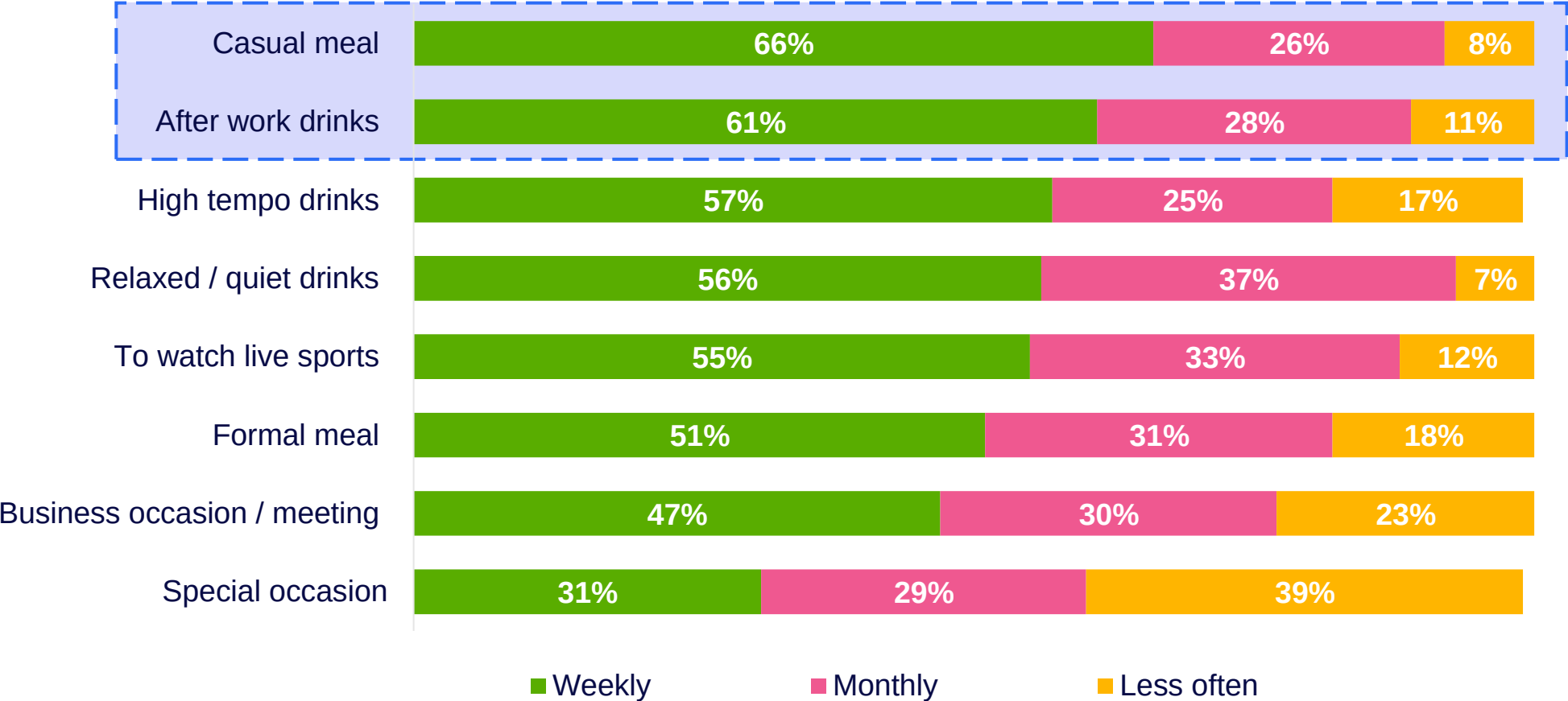


Brands

- Beer Brands would typically drink
- Beer brands purchased in the past 3 months
- Beer Brands would typically drink by channel

Lower tempo occasions are the most popular amongst beer drinkers and are key to target as they provide the most engaged On Premise audience with a high proportion of weekly visits

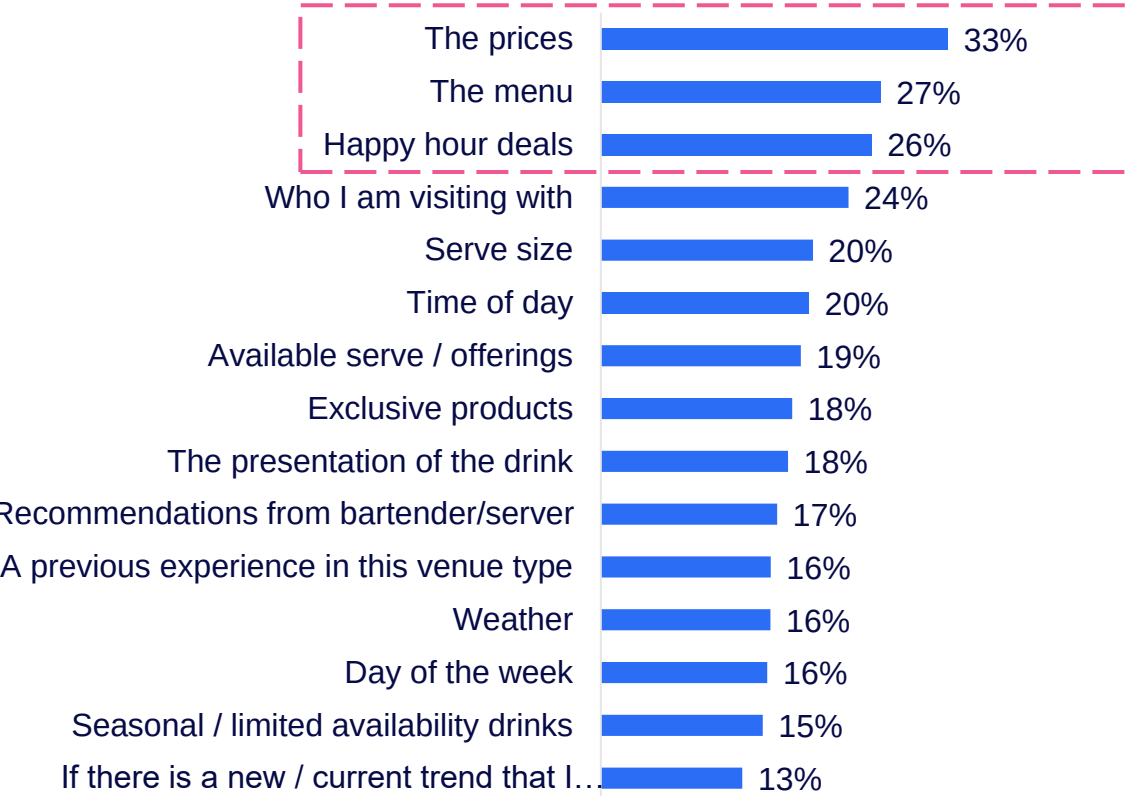
How often would you go out for the following occasions in a 3-month period?
(Beer drinkers)



Source: CGA OPUS SEA – Malaysia H2 2024, sample size: 138 - 323

Brand visibility with clear pricing will be vital to influencing drink choice in-venues across all channels

Which of the following factors could influence your choice of drink when you are in [channels]? (Beer drinkers)
Averaged across primary channels



Source: CGA OPUS SEA – Malaysia H2 2024, sample size: 104 - 461



SAMPLE SLIDE

A casual meal and after work drinks displays the highest consumption levels for beer and therefore have the most opportunity



Beer is the #1 drinks category consumed across all occasions for beer drinkers

What do you typically drink when out for a...?



Casual meal

64% of beer drinkers
consume beer



After work drinks

62% of beer drinkers
consume beer

Source: CGA OPUS SEA – Malaysia H2 2024, sample size: 167 - 200



OPUS delivers value across your business



Brand & Marketing

Shape successful brand strategies by ensuring your brands align with the most profitable On Premise opportunities

- + Drive growth by ensuring brand appeals on the most frequent and profitable occasions
- + Ensure brands are appealing to consumers who go out and spend the most
- + Grow consumer engagement and resonance by ensuring brand strategy meets the needs of target consumers
- + Invest in the most relevant On Premise levers (marketing campaigns, in outlet activations, promotional mechanics or bartender advocacy programmes) with a better understanding of path to purchase of category



Insight & Category

Track changing consumer trends and uncover opportunities for growth

- + Stay ahead of the competition by understanding how occasions are changing and where those occasions are taking place
- + Determine investment requirements by understanding size of the prize, and growth opportunity by category, occasion & channel
- + Identify growing categories and category opportunities to innovate and grow brands
- + Identify trends such as localisation, premiumisation etc to tap into
- + Identify unmet consumer needs



Sales

Create targeted sales strategies that are linked to brand and marketing objectives

- + Achieve more listings for your brands through tailored sales stories by occasion and channel
- + Provides most robust view of behaviours across the total channel – not just based on behaviours in managed chains, enabling you to create tailored customer stories for free trade customers
- + Identify size of the prize opportunities for each channel to determine sales investment
- + Create a target sales strategy which prioritises the channels with the biggest opportunities in terms of spend, frequency of visit and category consumption

Why trust CGA as your consumer research partner?



On Premise Expertise

CGA is the only agency specializing in the intricate On Premise sector, offering unmatched expertise



Global Thought Leadership

CGA seamlessly integrates On Premise context from various sources through our dedicated specialists



Strategic Partnership

CGA's experts seamlessly collaborate to offer actionable insights and strategic recommendations tailored to your unique brand

Custom Consumer solutions from CGA

Tools to test marketing and sales materials before launch and to measure effectiveness in-outlet



Influencing the Bartender

Learn how bartenders perceive your category/brand, how they recommend and what you can do to influence this so you can have a direct and tangible impact on the path to purchase and drive sales to your category/brand by influencing the influencer.



Optimizing the back bar

Unlock the most effective back bar strategy for your brand and test different designs with consumers, to provide you with data-led recommendations for operator partners to best position your brand on the back bar and then measure the ROI to enable you to invest in the right space and drive sales.



Optimizing menu design

Test menus to understand the best layout and placement for Spirits and your brands, inc. price points and specials. By optimizing the menu design, you and partner operators can have the biggest influence on consumers and their drink choice, driving sales and maximizing revenue.



Optimizing PoS marketing materials

Test designs of PoS materials and merchandise for a specific brand, to assess the impact on consumer perceptions and likelihood to purchase, removing the risk of launching nationwide marketing programs by testing different ideas before investing.



The Perfect Serve

CGA can measure the impact of investing in training and implementation of the perfect serve for your brand, to provide you with an understanding of how the perfect serve grows sales for the brand and venue, and where future activation should take place.



Branding activations and menus

Test menu and promotion names to assess the impact on likelihood to engage consumers and lead to purchase. This can be used to support operator partners and the impact measured to ensure effective investment in launching these marketing programs.

Additional Capabilities: Consumer Solutions available across Asia



Custom RFP Support Decks

Take banner-specific sales stories to national account customers to give insights on not just your product but the market at large. Profile and compare your brand's consumers with their guests to discover synergies



Consumer Segmentation

Enabling clients to more strategically and effectively target drinkers with messaging and offerings that relate to them, ensuring \$ are spent more effectively in On Premise brand building.



Optimum Assortment

CGA's first assortment tool allows you to enable your teams to go 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 On Premise Research

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



Path to Purchase

How consumers make choices in outlet has drastically changed. Which levers can be pulled and where? Understand the decision corridor consumers go through when purchasing a drink.



Bartender Research

Bartenders and servers are the final touch point of influence in the channel. With such change understanding advocacy and bartender needs can lead to influential sales of your products.



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