

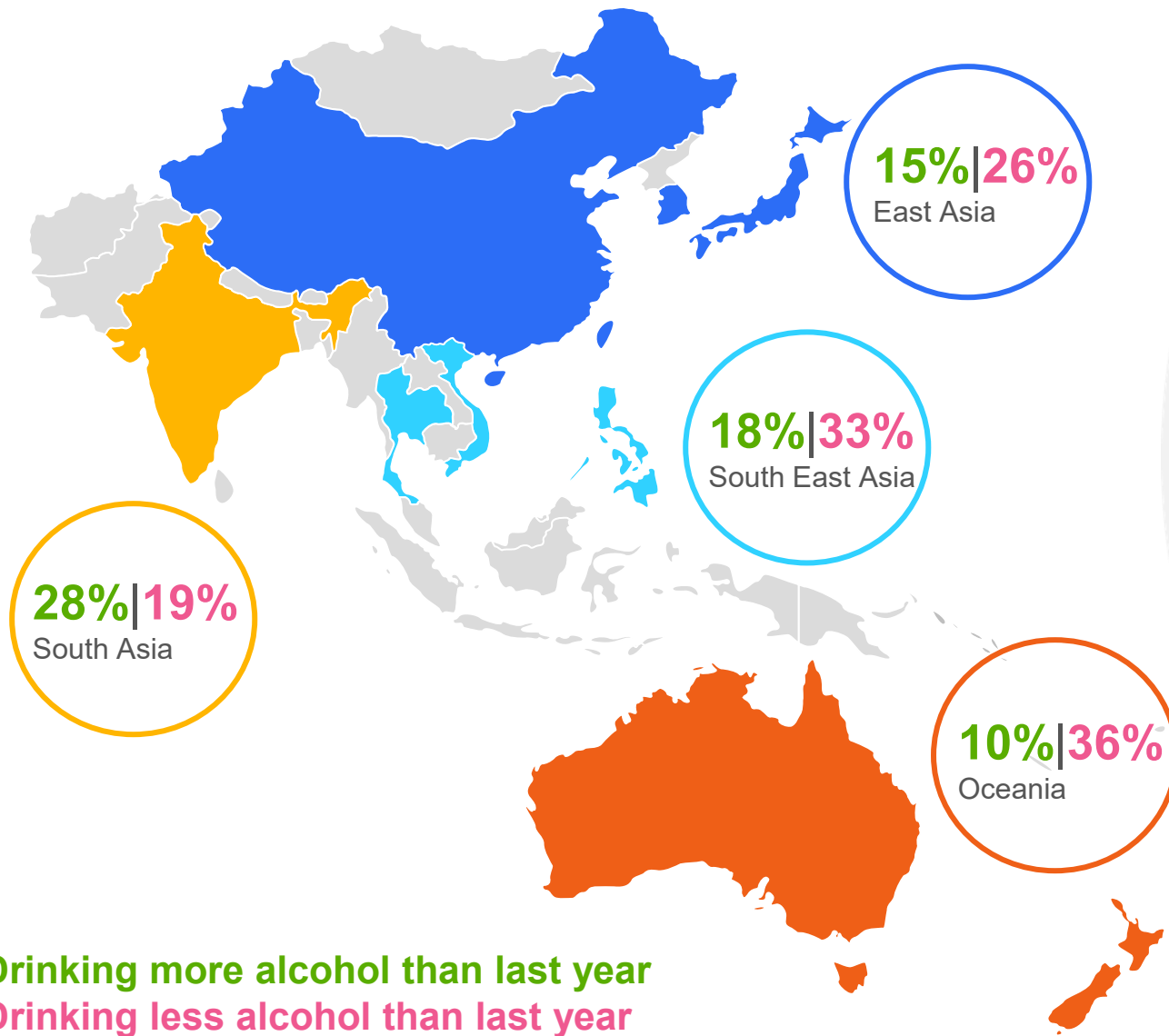
Mindful Consumption

In the mind of the BevAI consumer

APAC
2025

NIQ





Consumers across
the globe are
choosing to drink
less alcohol than
they were 12
months ago

Drinking more alcohol than last year
Drinking less alcohol than last year

Source: NIQ Consumer Outlook 2024

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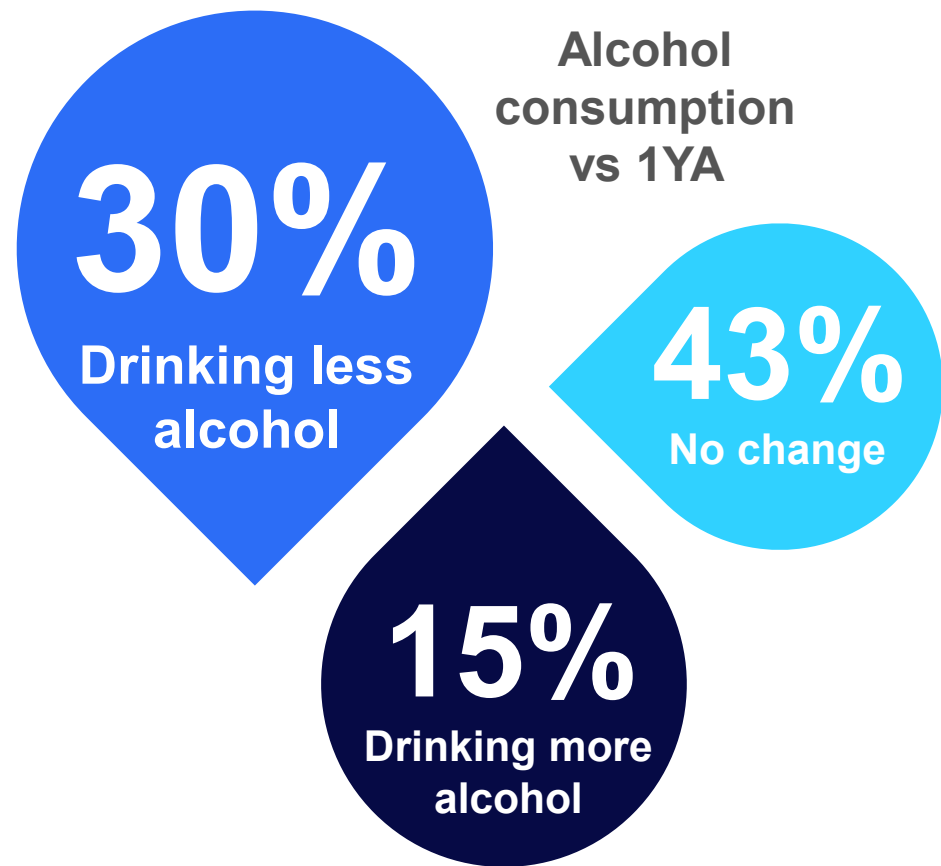
APAC Consumers are no longer drinking out of habit—they're drinking with purpose. This shift toward mindful consumption is not a passing trend; it's a cultural reset that's redefining how, when, and why people drink. Brands that understand this shift will be the ones that stay relevant.

James Phillips

Head of BevAI APAC



APAC consumers are **reducing their alcohol consumption**, creating challenges for suppliers who are competing in a declining space



Source: CGA REACH 2024



Why are consumers *drinking less* than they were a year ago?

“I can't afford to buy as many drinks”

“I am trying to be healthier”

“I prefer drinking no/low alcohol”

“I am trying to save money”

“I am consciously trying to cut down my alcohol consumption”

“I am going out less”

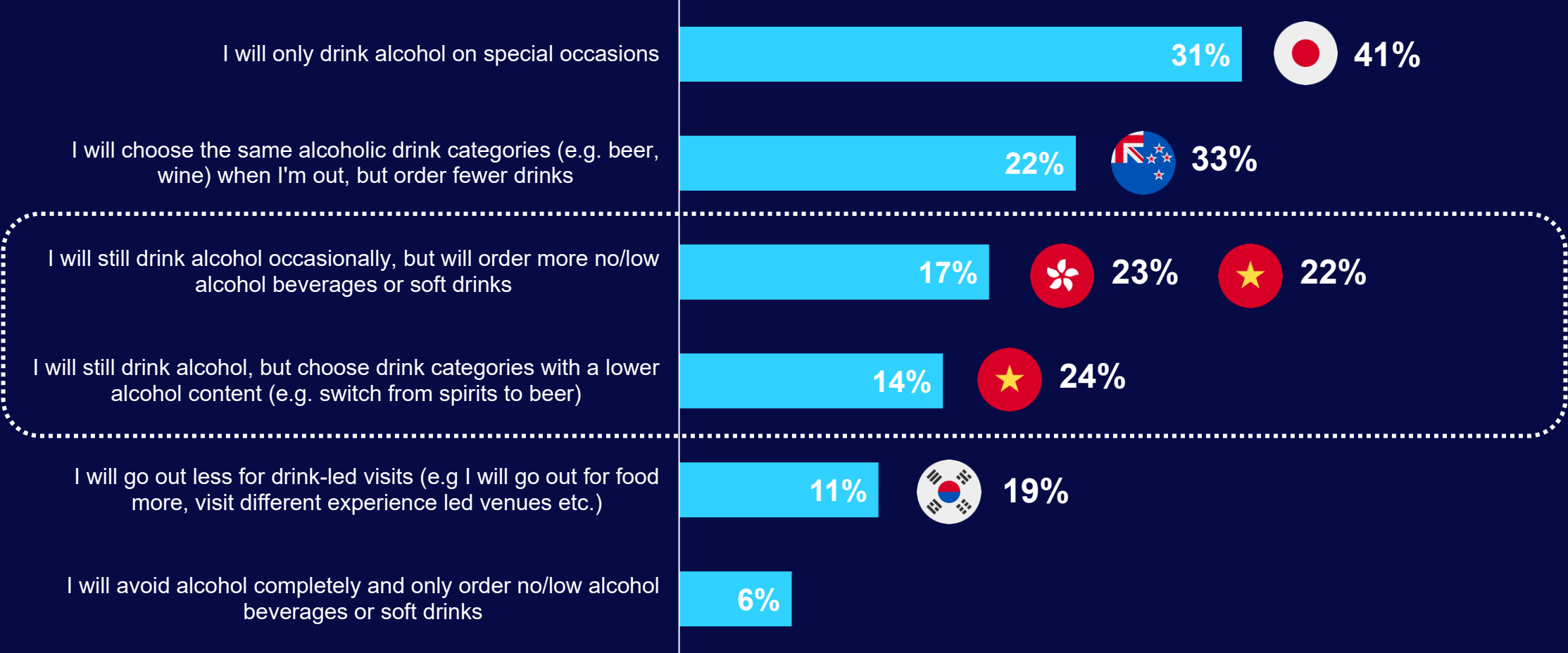
“I prefer drinking soft drinks”

“I do not like feeling hungover”

“My lifestyle has changed”

Source: REACH 2024, APAC

For consumers who plan to start or continue moderating their alcohol consumption when going out, how do they intend to do so?



Source: REACH APAC 2024

Mindful Drinking isn't a Niche — *It's a Movement*

Consumer identity is shifting, and their alcohol consumption habits are evolving with it.

Is your brand keeping up?



It's About Intention, Not Abstinence

Mindful drinking is driven by health goals, lifestyle alignment, and social flexibility. Brands must offer options that respect this intentionality without feeling restrictive or dull.



Occasions and Expectations Are Evolving

From post-work wind-downs to wellness brunches, consumers are redefining when and why they drink — and expect choices that fit those contexts.



Value Is Being Redefined

Value no longer just means price — it means purpose, quality, and alignment with personal values. Brands must deliver on taste, story, and function to stay relevant.

*No/low ABV
spirits are an
untapped market
that can enable
suppliers to
capitalise on
growing health
consciousness and
declining alcohol
consumption*

1 in 3

APAC consumers have tried a **low alcohol or non-alcoholic drink** at a bar, restaurant or other similar venue

*22% of APAC consumers have
never tried a no/low alcoholic drink in
On-Premise or Off-Premise venues*

? Are you actively adapting your offerings to meet consumers evolving preferences? **?**

Source: REACH 2024, APAC sample size 8281

#1 No/Low Alcohol Beer

#2 No/Low Alcohol Wine

#3 No/Low Alcohol Spirits

#4 Mocktails (do not include alcohol spirits)

#5 Virgin Cocktails (include non-alcohol spirits)

**Which No/low
categories are
consumers
open to try?**

Source: REACH 2024

Is your brand pivoting towards no/low?

The opportunity for brands isn't less consumption, but more relevance.

Understand who's moderating

Identify key consumer segments choosing no/low options — by age, lifestyle, values, and frequency of moderation.

Pinpoint growth occasions

Learn when and where no/low is being consumed — from routine moments to event-led visits.

Map drivers of trial

Uncover what motivates first-time no/low purchases — health, taste, social acceptance, or curiosity.



Redefine value

See how no/low consumers define value — including perceptions of authenticity, ingredient quality, and “treat” moments.

Leverage influence touchpoints

Understand which social platforms, peer groups, or in-venue cues are most likely to drive no/low engagement.

Optimize channel strategy

Identify which venues, formats, and dayparts are most receptive to no/low offers.

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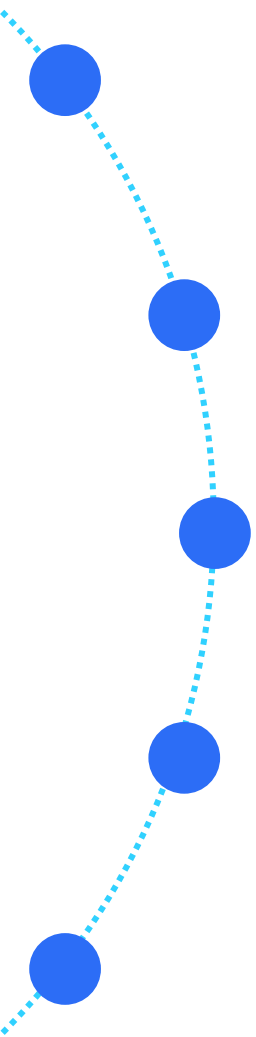
The mindful drinking movement presents a powerful opportunity for brands to lead with purpose and innovation. But success requires more than just product reformulation—it demands strategic clarity.

At NIQ, our Beverage Alcohol solutions provide the data, insights, and foresight brands need to navigate this evolving landscape and build strategies that resonate with today's conscious consumer.

Jo Stephenson-Thompson

Client Success Lead- APAC





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
behaviours*

Go deeper on moderation with REACH 2025

As moderation continues to reshape the On Premise landscape, the insights you've just explored offer a valuable snapshot of this evolving trend. ***But they're just the beginning.***

REACH 2025 takes you further - delivering the most up-to-date and comprehensive exploration of moderation behaviours, with fresh 2025 data, sharper consumer segmentation, and global perspectives. It builds on the foundations laid in this deck, offering a deeper, more detailed understanding of **how and why moderation is evolving.**

Beyond moderation, REACH 2025 also uncovers a wide range of emerging and evolving On Premise trends - from **drink choices** and **venue preferences** to **accessible luxury**, **wellness**, and the **influence of social media**.

What's included?



Updated 2025 data on frequency of alcohol consumption at home and in the On Premise



Shifts in category preferences and attitudes toward alcohol



Deeper understanding of why and how moderation is evolving across demographics and market



How consumers are actively moderating - from drink choices to social behaviours

**Find out more about REACH 2025
here or get in touch with the team**

Consumers are changing what they drink — *are you changing what you serve?*

Brands that truly grasp shifting behaviours are the ones that stay relevant, resonate deeper, and lead the change rather than chase it.

From **motivations to mindsets**, uncover powerful insights that can help your brand **stay ahead of the curve - and ahead of the competition**.

James and the team are ready to **take you further into the insights** and decode what it means for your brands future. **Get in touch to learn more:**



James Phillips

Head of BevAI APAC

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