

Catering for Cocktails in the GB On Premise

Mixed Drinks Research, H1 2025



The Research will explore:

- + **Consumer perception and awareness** of cocktails in the On Premise
- + **Drivers and key factors** in cocktail choice
- + Influences on **venue selection and daypart consumption** – highlighting when and where cocktails are consumed, and the mechanics driving purchase decisions
- + The appeal of **emerging trends** – interest in no & low serves, sustainable ingredients, and other innovations shaping the category's future

And more...



The Research will help you:

- + Gain a deeper understanding of On Premise cocktail drinkers
- + Stay ahead of your competitors by revealing **the current cocktail trends**
- + Tailor your cocktail offering by outlet type to **drive sales growth**
- + Understand the **path-to-purchase** and **key drivers for cocktail consumption** in the On Premise
- + Allow you to build a comprehensive On Premise strategy to **maximise every opportunity**



The research features key insights to support your cocktail strategy...



Methodology

Utilising a combination of CGA's consumer and sales data to provide a holistic view of the GB Cocktail market to inform your Cocktail strategy

Mixed Drinks Online Survey

- *In field 16th April – 6th May 2025 surveying 1,001 nationally representative GB On Trade Spirit consumers*
- *Spirit & Mixer consumers: 810, Cocktail consumers: 580, Shot consumers: 355*

Cocktail Sales Data

- *Utilising EPOS data from 9,000 outlets and OPM*

Cocktail Stocking Data

- *Utilising delivered-in data and EPOS data from 64,000 outlets*

CGA Proprietary Data

- *Insights from CGA Business Leaders Survey 2025, CGA Global Reach survey from 19 countries & CGA Global Bartender Report 2025*

All consumer data has been tested at the significance level of 95%



Bolt on report

Shots

Understanding the shot consumer

- Are consumers choosing high or low ABV shots?
- Are preferences amongst younger consumers changing?
- Where is the opportunity for shots outside of late night?
- How are innovations in the category shaping the market?

Explore evolving macro-trends across bombs and shots to optimise your beverage strategy

Interaction with shots

Understanding who the energy bomb and shot consumer is and how they interact with the category

Consumer preferences

Consumer preference for different serves when visiting the out-of-home market, as well as a look at the top brands chosen during visits

Bomb and shot drivers

Insights into the key factors influencing the decision to drink shots when out, and what might encourage more frequent consumption

Outlet & Occasion Preference

Understanding consumers' shot interactions across different channels, occasions and dayparts

Contact your account manager for more information. Discount available when purchased in conjunction with the Spirit and Mixer or Cocktail report

Bolt on report

Spirit and Mixer

How to win in spirit and mixer serves

- Which consumers are most important to the category?
- How can you tailor spirit and mixer pairings to optimise sales?
- What does quality look like to consumers?
- How can you extend consumer repertoire?

Spirit and Mixers remain a key format driving On Premise spirit consumption

Interaction with Spirit and Mixers

Understanding who the Spirit and Mixer consumer is and how they interact with the category

Consumer Preferences

Consumer preference for different Spirit and Mixer serves when visiting the out-of-home market, as well as a look at the top Spirit and Mixer brands chosen during visits

Spirit and Mixer Drivers

Insight into the influential factors at play when choosing to drink Spirit and Mixers out of home and which of these factors are the most important to consumers

Outlet Preference

Understanding consumers' Spirit and Mixers interaction across different channels and dayparts

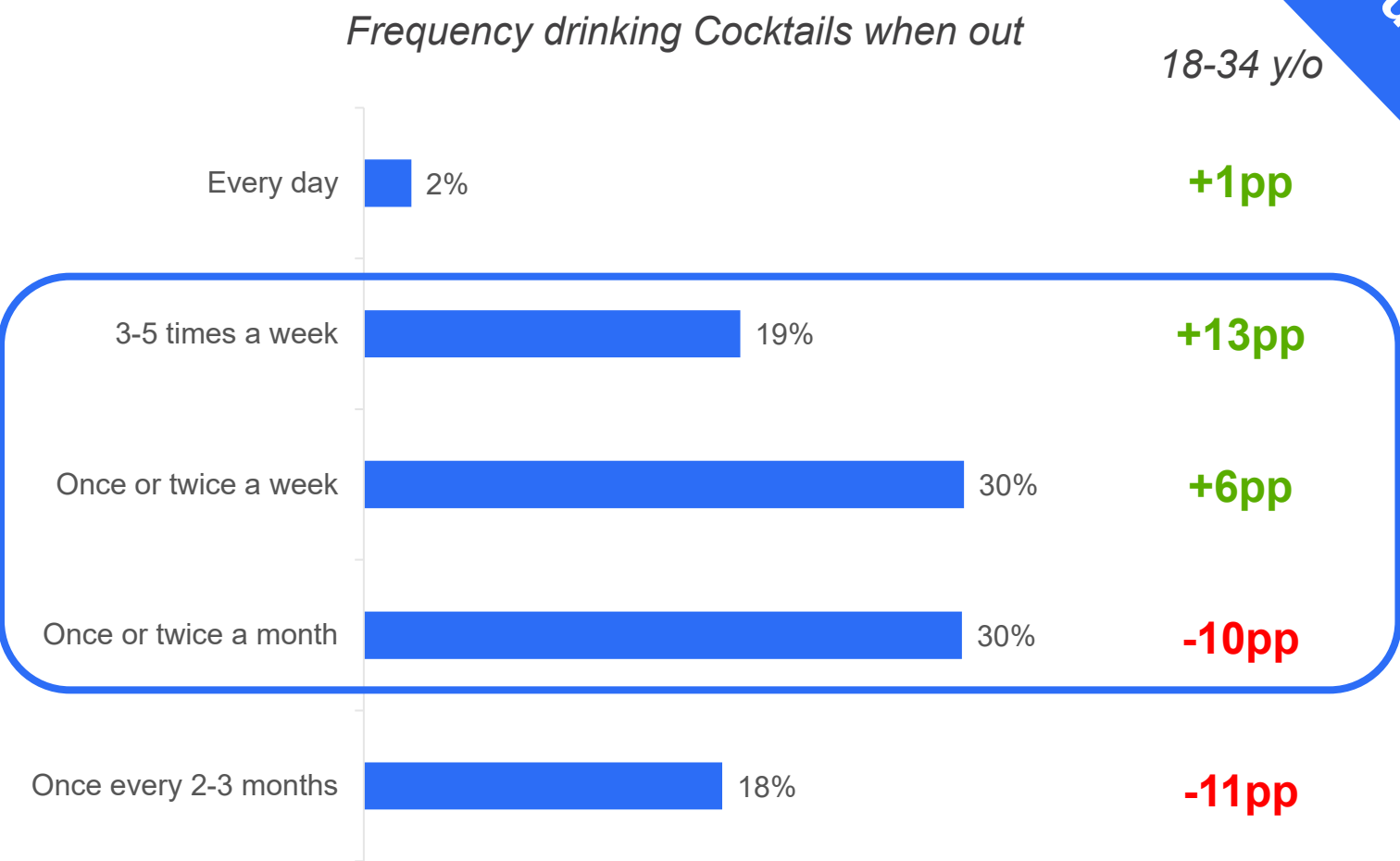
Contact your account manager for more information. Discount available when purchased in conjunction with the Cocktail or Shot report

40%

Of cocktail drinkers are drinking them *more frequently* than they were a year ago

With half of all cocktail drinkers choosing the cocktail they like best, this is a valuable consumer to attract

Example Output



CGA Mixed Drinks H1 2025: Sample size 580

2 in 5 cocktail drinkers claim to only drink premium serves, with these more popular among the younger demographic, who prioritise their on premise spend

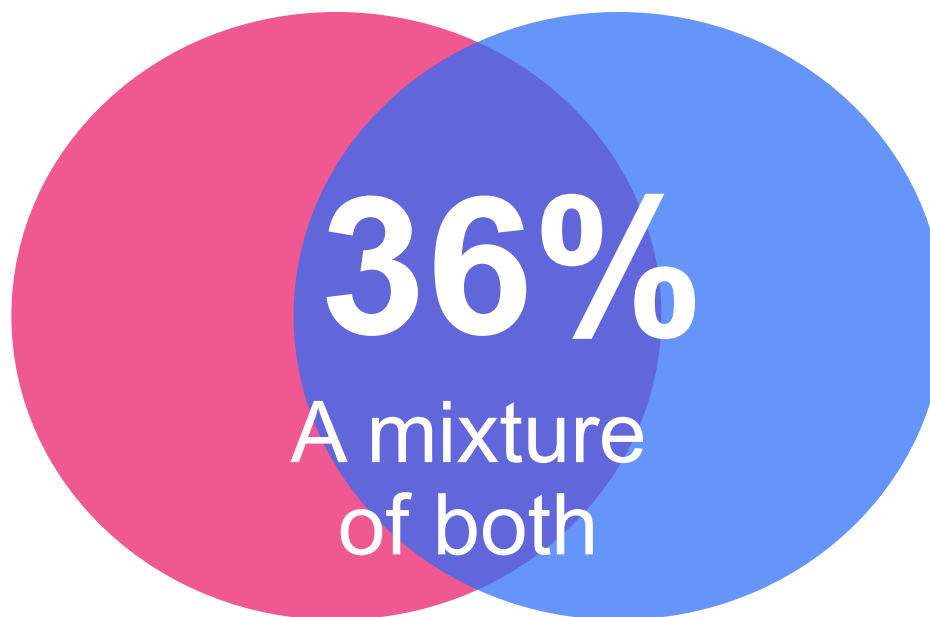
Example Output

Would you say the Cocktail(s) you typically drink are mostly...

41%

Premium
high-quality
Cocktails

+6pp 18-34 y/o



+4pp 55+ y/o

23%

Value Cocktails

(i.e. lower priced, or in a 2-4-1 or Happy Hour deal)

+3pp 35-54 y/o

Its not just the serve where consumers are looking for
the venues in which they visit also need to comm

Types of venues visited for Cocktails

48%

Value/ Lower
Market

+5pp 35-54 y/o

71%

Premium/
Upmarket

+10pp 55+ y/o

CGA Mixed Drinks H1 2025: Sample size 580

Bartender advocacy can be a significant driver of drink sales, which can be leveraged through optimisation and alignment of education and support to the bartender community

Example Output

88%

Of bartenders will typically make at least one drink recommendation to a guest every shift

Education

91% Of bartenders agree that they are more likely to recommend a brand if they have learnt about it in training

Support

40% Named 'Brand support for bartenders / the bar industry' as a driving factor for deciding what to recommend

Source: Barsights The Global Bartender Report 2025: Sample size: 1503

Just over half of shot consumers drink shots and bombs weekly; understanding this will be crucial to increasing frequency among the rest

Example Output

Frequency drinking shots/energy bombs when out | GB Shot/Bomb consumer



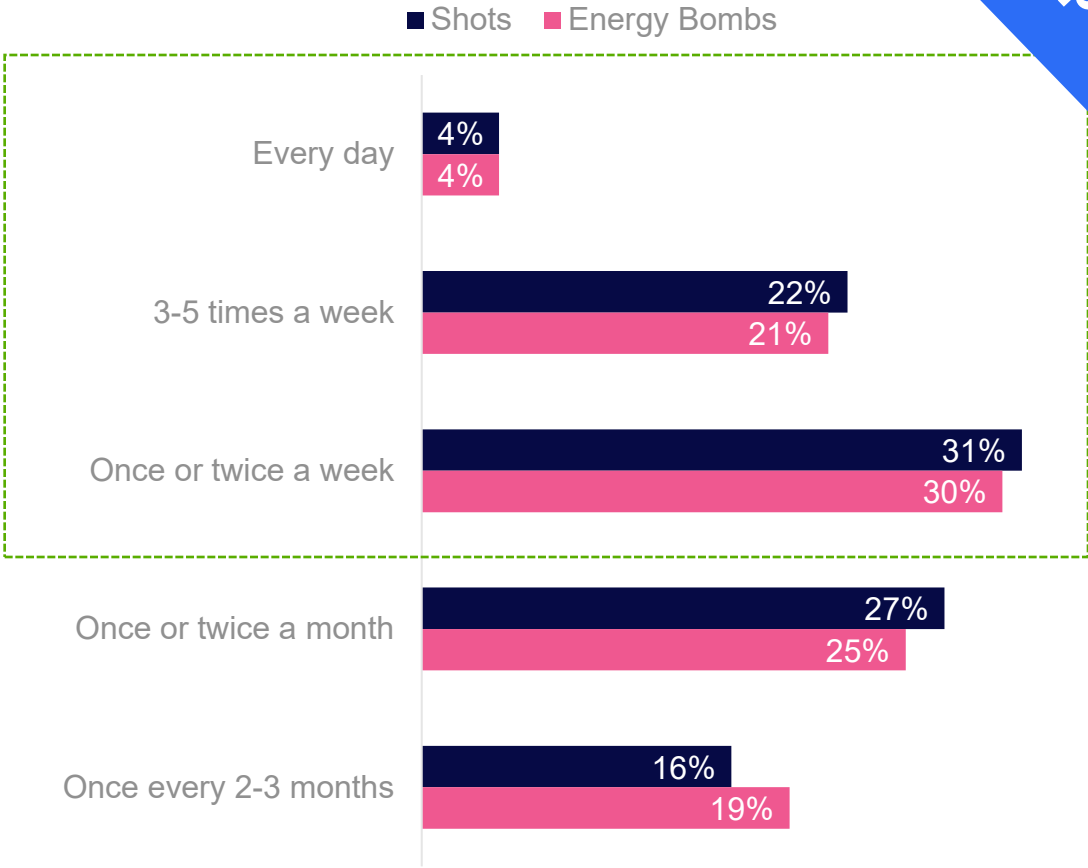
57%

drink *shots weekly*



56%

drink *energy bombs weekly*



With over 3 in 4 consumers prioritising
recognisable brands, strong bar visibility is vital
for driving awareness and influencing choice

*Importance of recognising Spirit brand when drinking
Spirit and Mixers*

77%

of Spirit and Mixer consumers think that it is
important they **recognise the Spirit brand**
used in a serve

Example Output



Why CGA?



On Premise specialization: CGA's expertise in the On Premise sector is crucial for unlocking insights that truly make a difference. Generic insights are not valuable in this unique sector, and CGA's specialisation ensures the relevance and impact of the insights provided.



Comprehensive understanding of the market: CGA's OPUS offers a complete and specialist view of the On Premise market. By analysing consumer behaviour, category trends, venue types, brands, and occasions, it provides a comprehensive understanding that can be utilised by various teams within a business, from Field Sales to Category Development.



Built by On Premise experts: CGA's team consists of On Premise consumer research specialists who possess in-depth knowledge and understanding of the sector. They employ world-leading research techniques and leverage their expertise to deliver clear, actionable, and robust insights.



To learn more about how Mixed Drinks Research can help your brand, feel free to get in touch:



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