



CGA by NIQ 2025

Channel Strategy Study

Unlocking beverage opportunities in key On-Premise channels
by understanding consumer preferences and behaviors across
diverse venue types

NIQ





Channel Strategy Study 2025

CGA by NIQ are re-launching the US Channel Strategy Study for 2025, following significant demand and feedback from clients.

While maintaining the foundation of the 2024 study, the 2025 survey is being refreshed to dig deeper than ever before, arming clients with the insights they need to navigate an increasingly complex landscape with confidence.

New for 2025

- 20% increase in sample size
- Occasion & need state mapping
- "Last visit" specific metrics for a deeper understanding of consumers' Path to Purchase
- Enhanced 'Size of the Prize' metrics including category price ceilings & value perception by sub-channel
- Expanded drink categories and brand lists (e.g. Functional Beverages)
- Refreshed sub-channel deep-dives with the inclusion of new coverage (e.g. Vibe Dining)

Unlock rich channel insights with the 2025 Channel Strategy Study

The 2025 Channel Strategy Study from CGA by NIQ provides a comprehensive view of consumer behavior, preferences and attitudes across 11 key On-Premise channels.

Understanding how **drink choices, decision-making, and motivations vary** based on the nuances between channels is critical for suppliers looking to **activate effectively and drive growth**.

Insights from the Channel Strategy 2025 study will allow you to **maximize ROI by aiding in the development of tailored strategies** that reflect how and why consumers engage with different venues.

The study also includes **year-on-year comparisons where relevant**, helping suppliers **track shifts in behavior** and **assess the effectiveness of existing strategies**.

The aim of CGA by NIQ's 2025 Channel Strategy is to....

- ✓ Help suppliers prioritize their resources, giving them an idea of **where and how to play**
- ✓ Provide suppliers with nuanced and actionable insights to form tailored strategy and **ensure optimum brand positioning** across the On-Premise landscape
- ✓ Explore **underrepresented yet strategically important channels** where consumer behavior is distinct, such as stadiums/arenas, airport bars, outdoor events
- ✓ Allow for a **range of direct comparisons across channels** to help suppliers **prioritize investment** based on **consumer behavior and commercial opportunity**
- ✓ Identify **untapped potential and white space opportunities** for your brands

The Channel Strategy 2025 study will provide you with...

- ✓ An in-depth understanding of **central channels** that make up the foundation of the On-Premise
- ✓ Rich insight into **more nuanced channels** such as stadiums/arenas, outdoor events and airport bars
- ✓ An overarching view of the total On-Premise, providing an indicative **size of the prize** for each of the core channels
- ✓ A **detailed consumer profile of each channel visitor**, including their traits, preferences and behaviors
- ✓ A complete understanding of **what is important to the channel experience**, encompassing both **functional** and **emotive factors**
- ✓ Exploration of a consumer's **last visit** to the channel including **their trip purpose** and an enhanced view on their **path to purchase**
- ✓ **Brand awareness and preferences** across channel visitors to ensure you can maximize penetration of your brand

Which channels are covered in Channel Strategy 2025?

The core report provides a clear view of where to play across 11 distinct On-Premise channels. Supporting deep-dive reports offer focused insights at the individual channel level, helping teams understand how to play by shaping tailored strategies and unlocking the full potential of each channel.

- Casual dining restaurants
- Neighborhood bars (*including college-themed venues, both on and off-campus*)
- Sports bars
- Premium bars (*including cocktail bars, wine bars, rooftop bars, private clubs/lounges & more*)
- Fine dining restaurants (*including experiential/theatrical concept fine dining, lively/social/vibe fine dining & more*)
- High energy venues (*including premium & casual nightclubs and dayclubs*)
- Experiential / “Eatertainment” venues (*including activity-based bars, arcade bars, interactive bars & more*)
- Arenas / sports stadiums (concessions)
- Casinos (*including stand-alone casinos & casinos within hotels*)
- Airlines / Airport bars & restaurants
- Outdoor events (*including music/art festivals, sports events, music concerts & more*)

What's new for 2025...

20% increase in sample

- Increased from n.7,500 in 2024 to n.9,000 in 2025
- More robustness especially for more nuanced channels (e.g. Stadiums/arenas, Eatertainment etc)
- Enables further granularity, increasing the opportunity to split the data across drinkers for smaller, emerging categories & brands

Stronger support for strategic decisions across more nuanced consumer segments and channels

Occasion & need state mapping

- Expanded Occasion List encompassing both food & drink-led visits to align with the growth in food-led occasions
- More granular and contemporary occasions, reflecting evolving consumer habits
- Captures both the **functional** (e.g. meals, drinks) and **emotive** (e.g. to relax, to connect) drivers behind visits.
- Offers the opportunity to align data with your internal occasion segments through custom deep-dives

Enables more targeted messaging, innovation, and activation strategies based on a deeper understanding of consumer motivations

'Last visit' specific metrics

- Framing has moved from typical behavior to a consumer's most recent visit to a channel to capture tangible, '*in the moment*' behavior
- Enhanced Path to Purchase content, covering the who, where, why, when and how, encompassing footfall drivers to venues
- Granularity added to categories consumed, including # of serves and what consumers are switching from and to in a channel
- Retained top-level future looking insights
- Retains the opportunity to perform custom comparisons against 2024's 'typical' data

Provides insights into what consumers are *currently* doing to allow you to respond to such behaviors with agility and creates a more accurate Path to Purchase

Enhanced 'Size of the Prize'

- Introduction of 'walk-away' price for mega-categories per channel to inform actionable value perception trade-offs
- Deeper look into how channel, weekly ordering opportunity, visitation frequency & category consumption intersect
- Additional build that unlocks the capability to understand the monetary size of the prize for your brands

Quantifies the commercial opportunity with greater accuracy to inform investment, activation, and channel prioritization

Last visit channel deep dive ^{*New for 2025*}

Pre-visit

- ✓ When consumers planned their visit and how they made their specific venue choice
- ✓ Factors influencing category choice before entering the venue

In-venue

- ✓ An understanding of consumer occasions and need states to explore how these intertwine
- ✓ Day of week and time of day visitation
- ✓ Category consumption during visit
- ✓ Number of serves consumed by category
- ✓ In-venue category decision-making
- ✓ Category and brand switching during visit, including reasons for doing so, and category consumption journey



1. The Core Report *designed to identify potential within channels*

The Core Report provides a comprehensive overview of the 11 unique channels that form segments of the wider On-Premise.

This enables an understanding of the dominant consumer profiles within each channel; an ability to identify **where to play** for the biggest opportunities for growth and prioritize planning, investment and activations for success.

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?
- **Enhanced builds to facilitate custom size of the prize brand deep-dives:**
 - How many serves of a category are they having in a channel?
 - What is the walk-away price across mega-categories in the channel? Where is the ceiling for pricing?

This will highlight where to play, identifying the channels with the strongest commercial potential, helping you align growth opportunities with your brand portfolio

Understanding the target consumer profile per channel

- What are the key demographic and psychographic profiles for consumers within each channel? How do they differ in relation to experimentation, definitions of value for money and receptiveness to premium offerings, etc. ?
- What drink or food-led occasions are consumers most commonly visiting a specific channel for? How does this intersect with their need-states?
- What drink categories are consumed during these visits and how? How does this change per channel?
- What are the most important elements of a drinks offer that consumers are looking for in each channel? What encourages brand loyalty and switching?

This will establish an understanding of which channels offer the strongest alignment between your portfolio and target consumers within that channel.

2. Channel Deep-dives *designed to inform powerful, nuanced strategies*

Once the most relevant channels for your brand portfolio are identified, the second phase of deliverables informs Brand, Marketing, and CP&A teams in **how to play**; deep-diving into the unique dynamics within channels.

These cost effective, channel-specific reports will provide granular insights into each channel's key dynamics, aiding in building winning strategies, understanding competitive positioning and uncovering the most effective ways to activate within a channel.

What defines a great channel experience for consumers and drives footfall?

This will be based on a range of factors that led them to the specific venue they went to on their last visit to the channel:

- Do signature food/drink items drive visitation to a fine dining restaurant? Do loyalty programs drive footfall to casual dining restaurants?
- Is being in a 'must-see location' a driver for premium bar visitation? What influence do channel-specific events hold over visitation?
- What influence does previous positive experiences in the channel hold? How is this defined e.g. great service, high quality drinks?

What are the motivations for visiting the channel, and how does this differ by demographic?

- When do they plan their visits to the channel? How does this differ by sub-channel visitors?
- What emotional or functional needs are they looking to fulfil on their visit to the channel? How do trip missions (e.g. romantic occasions or quick visits) intersect with need-states (e.g. the desire to socialize, relax, let loose)?
- How does group type and time of day influence their behavior? How does this correlate with occasions?

What are consumers drinking within a specific channel and how are these decisions made?

- How do different drink categories perform in relation to each other? How does this play out across sub-categories and serve styles?
- How are emerging categories performing in the channel and what white space opportunity exists?
- When and how are they making these decisions? How loyal are they to brand and category on their visit? What are they switching from and to?
- What are the influences specific to this channel and how do you leverage them? How does this differ by sub-channel visitors?

What is your brand drinker penetration within this channel?

- How are they behaving in relation to your brands and competitors? How can you leverage channel specific factors to win share of serve?

This will uncover the most effective ways to position and promote both new and existing offerings within each channel, based on where the strongest growth opportunities lie for your brands.

Additional key information

METHODOLOGY:

- + Online quantitative survey
- + Focusing on 11 specific On-Premise channels
- + 9,000 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



Thank you!

[Click here to contact the experts](#)

Beverage Alcohol – On-Premise
September 2025

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