India’s On-Premise Opportunity

Turning Fast-Growing Visits and Changing Behaviours Into Growth

NIQ

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WHY INDIA'S ON-PREMISE MATTERS MORE THAN EVER

Welcome to NIQ's expert snapshot of one of the world's most important markets for Beverage Alcohol brands.

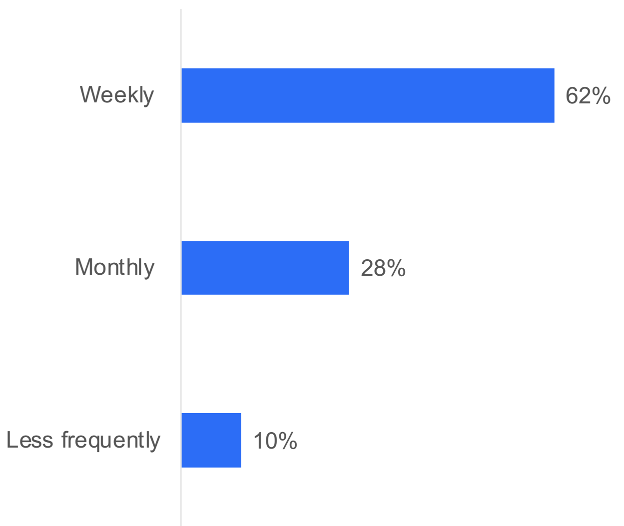
India is now the planet's biggest country in the world by population, and its On-Premise is in a period of serious and sustained growth. Eating and drinking out is part of the regular rhythm of life for a large proportion of India's consumers, and more than two thirds (**69%**) of them visit at least once every quarter. Of these, **62%** are visiting at least weekly. Across the population, there's an average of two visits to restaurants, cafes, bars and similar premises every week, and an average monthly spend of **₹3,251**.

India's On-Premise potential is vast. But for beverage manufacturers, there's not just scale but repetition, predictability and growing headroom for premium purchases. In this market snapshot, we use NIQ's exclusive OPUS Lite study of more than **2,500** On-Premise consumers to highlight nine key trends and opportunities for brands. It's a guide to success in a channel that is dynamic, deep and set for more growth.

69% | Of India's consumers visit the On-Premise at least quarterly

₹3,251 | Average monthly spend in India's On-Premise

Frequency visiting the On Premise



01

VISITATION IS RISING FAST

India's On-Premise has some of the most positive visitation trends in the world. Just over half (52%) of consumers say they have increased their frequency over the last year—nearly five times more than the number (11%) who are visiting less often.

The consumers who are stepping up their visits are disproportionately valuable to venues and suppliers. They now account for 68% of all On-Premise visits, far more than the group who are visiting less often, who contribute only 7% of visits. For brands, future growth will be driven by deepening engagement with this core group of visitors to restaurants, cafes, bars and other venues. Strategies focused on generating their loyalty, repeat orders and trade-ups can deliver greater returns than campaigns targeting infrequent or lapsed guests.

52% | Of consumers have increased their On-Premise visits in the last year

02

ON-PREMISE VISITORS ARE YOUNG, URBAN AND AFFLUENT

The demographics of visitors shows why the future of India's On-Premise is so bright. Younger adults are at the heart of the market, with well over half (**59%**) of visits made by those aged 18 to 34. By contrast, only **10%** are made by those aged 55+.

The channel is heavily concentrated in city centres. Two in three (**68%**) visits are made by consumers living in cities. Usage is also heavily tilted towards affluent consumers, with those in the high-income bracket accounting for exactly half (**50%**) of all visits. These are all positive dynamics for BevAl manufacturers. India's On-Premise is dominated by consumers who are brand-savvy and ready to trade up to more premium selections. Suppliers that can align their propositions with these guests and their occasions have huge potential for growth.

59% | Of On-Premise visits are made by those aged 18 to 34

03

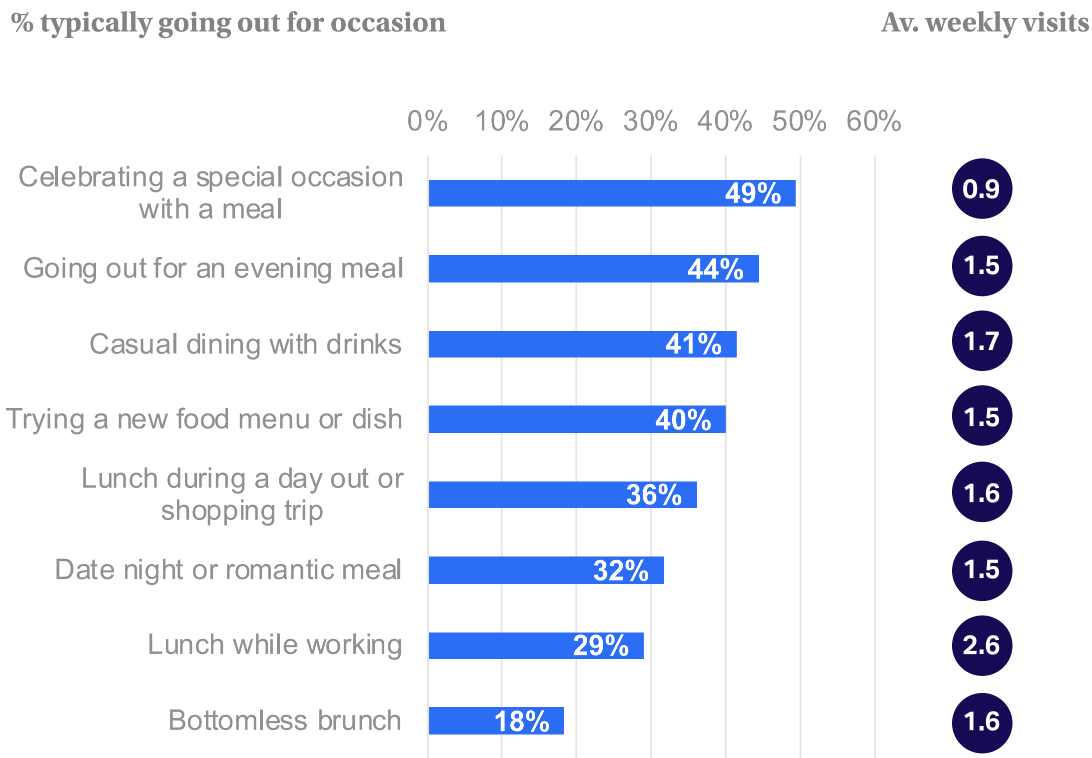
FOOD-LED OCCASIONS ARE THE BACKBONE OF THE CHANNEL

Food is the single most important driver of On-Premise visits in India. Virtually all (**99%**) On-Premise consumers make them, and they account for **35%** of total visits.

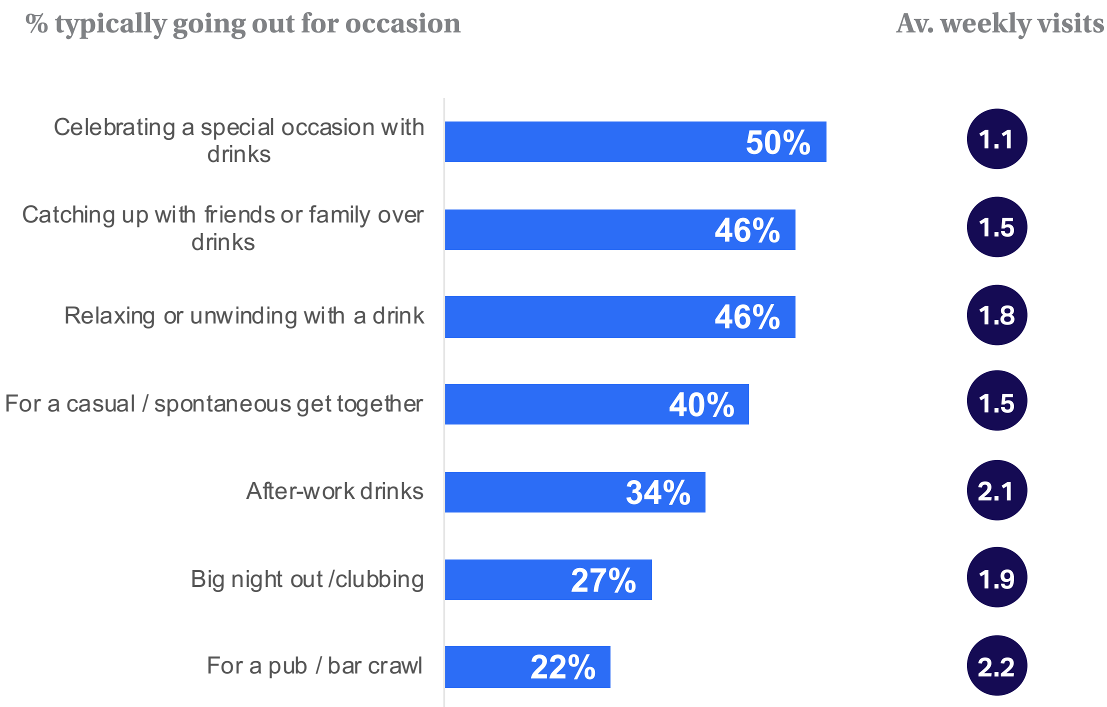
These food occasions have a very wide breadth. Celebrating a special occasion with a meal is most popular, but many other visits - like evening meals and casual dining with drinks - are driven by consistency. Working lunches generate the highest average frequency of all among their users, at **2.6** visits per week. While celebratory occasions are important, everyday food-led moments represent a powerful and often overlooked opportunity. These regular and predictable visits are particularly suitable for soft drinks, no and low-alcohol options and value-led options that complement food.

35% | Of On-Premise visits are led by food

Food-led occasions

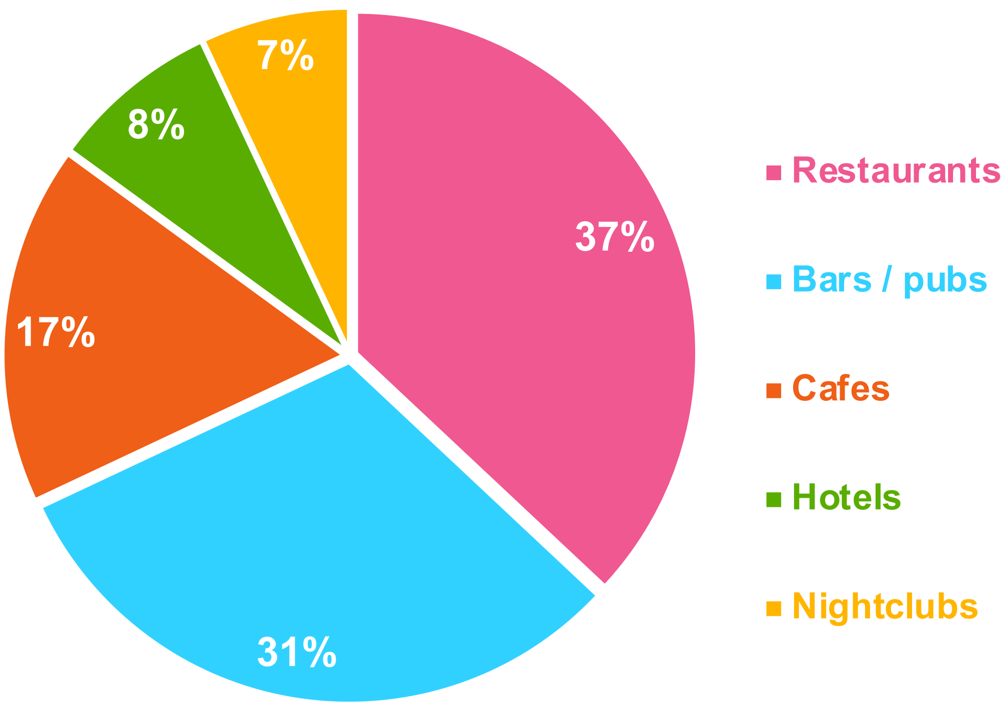


Drink-led occasions



Share of total On Premise spend by channel

(calculated based on frequency of visit and spend per visit)



Source: CGA OPUS Lite India H2 2025. Sample size: 2,506

04

DRINK-LED OCCASIONS ARE DRIVEN BY MINDSETS

Drink-led occasions account for **31%** of all On-Premise visits in India. But as with food, consumers' mindsets and behaviours are very varied. Half (**50%**) typically go out to celebrate special occasions with drinks, and nearly as many do so to relax (**46%**) or catch up with friends (**46%**). Casual or spontaneous get-togethers (**40%**), after-work drinks (**34%**) and big nights out (**27%**) are other parts of the drinking-out mix.

This diversity highlights the importance of brand relevance. Consumers may seek familiarity and comfort on one visit, but excitement and indulgence on the next. Brands that can flex their proposition, through things like serve rituals, visibility and activations, have the best chance of staying at the front of consumers' minds.

32% | Of On-Premise visits are led by drink

05

EVENT-LED OCCASIONS PUNCH ABOVE THEIR WEIGHT

Event-led occasions are a core part of India's On-Premise, generating a third (**34%**) of all visits. These moments are often anchored around food and drink festivals (**46%**), seasonal celebrations (**45%**), live sport (**30%**) and music (**30%**).

While the frequency of these visits can be low, they are high in value. Group sizes are often larger, dwell time is longer and the willingness to spend is greater. This makes these moments particularly suitable for brand activations, sponsorships and limited-time offerings. If beverage manufacturers get these right, events are a chance to build emotional connections and create positive memories as well as volumes.

34% | Of On-Premise visits are led by events

06

RESTAURANTS LEAD FOR REACH, BARS FOR VALUE

Restaurants have the longest reach in India's On-Premise. They account for **45%** of all visits—nearly double the number of cafes (**23%**), the next biggest channel.

However, segments like bars and pubs can generate more spend. While these two types account for **21%** of visits, they capture **31%** of revenue. Nightclubs have only **4%** of visits but **7%** of spend. These are significant over-indexings that show why manufacturers need to understand different dynamics and adapt strategies accordingly. For example, restaurants and cafés can be big platforms for brand recruitment, while bars are critical for premiumisation and theatre.

45% Of On-Premise visits are to restaurants

07

DRINK REPERTOIRES ARE BROAD

India's On-Premise consumers are not monogamous in their drink choices. They switch between an average of 5 different drink categories when out, which intensifies the competition for trial and loyalty.

Soft drinks are comfortably the most popular choice, with more than two thirds (**68%**) choosing them. This is followed by a long list of alcoholic categories including beer (**43%**), whiskey (**43%**) and vodka (**38%**), alongside other non-alcoholic ones like hot drinks (**41%**) and energy drinks (**41%**). Selections differ widely by time of day, occasion and venue. But while this variety can be a challenge, beverage manufacturers can also view it as an opportunity. Consumers' readiness to switch creates space for brands to engage them, particularly when portfolios are designed with clear roles for each category.

5 | Consumers' average number of drinks categories

08

QUALITY AND VALUE NOW GO HAND IN HAND

Many consumers are seeking not just quality or value: they want both. Two in five (**41%**) say it is more important than it was a year ago that their drink is high quality—and exactly the same proportion (**41%**) say good value has increased in importance. Health (**40%**), trustworthiness (40%) and Indian provenance (**37%**) are among the other attributes with growing importance.

This combination challenges outdated assumptions that consumers will either trade up or trade down. Quality and value are non-negotiables for many, and brands that can signal their quality while making value easy to understand are best placed to resonate with these demanding guests.

41% | Of consumers say quality and value are more important to them than they were a year ago

09

BARTENDERS HAVE A BIG ROLE TO PLAY

In the battle for sales, bartenders are on the frontline. NIQ's India Bartender Report reveals that more than two thirds (68%) of consumers are likely to buy a drink based on a bar team member's recommendation, while nearly nine in ten (86%) bartenders suggest an option on every shift. That means the average bartender in an upscale bar in India will actively influence about 8,360 drinks decisions every year.

This reinforces how important it is for brands to engage bar teams. Training, workshops, events and competitions are just some of the ways manufacturers can support bartenders and earn their brand advocacy.

86% | Of bartenders recommend a drink on every shift

HOW BEVERAGE MANUFACTURERS CAN WIN

These and other big trends point to the scale of opportunity in India's On-Premise, but also to its complexity. Visitation is rising and sales growth is being powered by young and engaged consumers, which means the future for this channel is very exciting. Visitors to restaurants, cafes and bars are ready to experiment and ready to spend.

However, loyalty to categories and brands is relatively low. Consumers are quick to switch and more demanding about quality and value than ever before. Their needs change from day to day, occasion to occasion and channel to channel.

In this ultra-competitive market, success will come from understanding trends and adapting nimbly. Tailoring strategies to food, drink and event led occasions and building partnerships with venues and their teams are vital. In a market where visitors are coming back week after week, it is relevance, not just reach, that will define who wins in the next phase of growth.

NIQ's suite of research solutions provides brand and beverage manufacturers with an unrivalled view of the Indian On-Premise sector. Through consumer, operator, and bartender in-market and global insights, it delivers expert analysis of engagement with different channels, occasions and categories, creating the deep market intelligence that manufacturers and brand owners needed to grow sales and market share. Our expert team can also deliver bespoke analyses, pinpointing tailored opportunities for individual brands.
To explore how our research can enhance your strategies or to learn more, please visit **www.nielseniq.com**