

From Highlands to Highballs: Six APAC Markets, One Whiskey Playbook

The Asia Pacific On-Premise is steadily resetting the stage for whiskey and not in a one-size-fits-all way. Across *South Korea, Japan, The Philippines, Singapore, Australia*, and *China*, consumers and bartenders are reshaping the category through distinct serve preferences, new premium cues, and format innovation.

For brand owners, the opportunity is twofold: show up where the drink is actually consumed (and recommended) and tailor the story to how each market signals value.

Market Dynamics in focus

South Korea: Premium disruption in a local stronghold

Whiskey dominates the On-Premise spirits mix (outside Soju), while international variants gain ground and malt bars accelerate premium discovery.

Whiskey holds roughly

70%

of quarterly spirits volume share

American whiskey

11.3%

of Whiskey volume share; Japanese 5.8%, Irish 3.3%

The rise of malt bars in Seoul is redefining premium cues

Action for suppliers

Build premium pathways via single malt flights, American style tastings, and bartender advocacy kits for malt bars. Use switcher focused content that reframes value around craftsmanship, not just age statements.



Japan: Younger female drinkers bring a mixing mindset

Growth pockets are emerging among women 18–34 who over index on cocktails, lighter ABV, and whiskey made for mixing cues.

Among whiskey drinkers weekly On-Premise visitation

20-34 (60%) | 35-54 (46%) | 55+ (34%)

Low ABV (16%) and 'made for mixing' (13%) stand out for younger females

Smooth, contemporary, and versatile profiles drive drinker appeal

Action for suppliers

Lead with highball storytelling, lighter serves, and social first content that showcases flavour and mixability. Trial "first sip" discovery sets with venues, tuned to the preferences of younger female audiences.



The Philippines: Win the high tempo night, then trade up

Lighter spirits currently dominate fast paced occasions; whiskey's path is to differentiate in high tempo while activating premium cues consumers value.

On-Premise spirits consumption:

42%

Vodka

36%

Gin

34%

Tequila

28%

Whiskey

55%

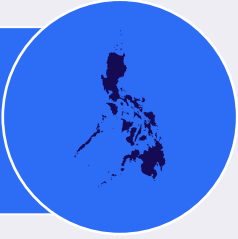
of whiskey drinkers say they're likely to trade up

Whiskey drinkers channels vs average drinker:

Pubs (+16pp) | Clubs (+14pp) | Hotels (+9pp)

Action for suppliers

Design nightlife activations that position whiskey as the premium alternative—limited cask drops, "rare pour" passes—and collaboration on menus to insert whiskey twists on the nation's favourite cocktails.



Singapore: Luxury cue alignment and Scotch depth

Whiskey remains **#1** among spirits drinkers but faces premium competition from Asia;

42%

of consumers drink whiskey when out

56%

of Whiskey drinkers purchase it **every/almost every visit**

14%

Highball features among popular cocktails

Consumers prefer **international brands (74%)**



Action for suppliers

Spotlight provenance and ingredient quality in digital storytelling. Create luxury bar partnerships—Scotch verticals, highball masterclasses—that reinforce **value for money** perceptions while guiding guests up the ladder.

Australia: Compete where consumption happens

Whiskey is **#2** spirits category and rising in penetration; the battleground is bottled mixers and rapidly expanding **RTDs**, and so brands must optimize formats or be cannibalised.

Category competitiveness

27%

Whiskey (+2pp YoY)

35%

Vodka

21%

Gin

18%

Tequila

65%

of whiskey drinkers consume RTDs in the On-Premise

Bottled mixers dominate whiskey drinking

Action for suppliers

For whiskey brands, the imperative is twofold: double down on cola-forward rituals to protect core occasions and innovate with whiskey-led RTDs to capture incremental growth.



China: On-Premise trial drives at home conversion; focus on the East

The On-Premise is a powerful funnel to retail in China; conversion intent over indexes vs global. Target the **East** for whiskey, while activating premium tiers.

69%

of global consumers repurchase at home after enjoying a drink out; China over indexes by **+12pp**

46%

The East region is especially attractive for whiskey discovery

Action for suppliers

Stage premium discovery programs in East coast cities—guided tastings, limited releases, and popups that bridge On-Premise trial to retail via QR follow ups, ecommerce bundles, and loyalty hooks.



How suppliers can take advantage of the opportunities in the Whiskey category

Five cross-APAC moves to operationalize now

- 1 Serve-based storytelling
- 2 Bartender education
- 3 Premium cues that convert
- 4 Format optimization
- 5 Trial to retail bridges

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