

NIQ Perspective

Cheers to Change: The New Rules of Alcobev in India

Here's what industry experts are saying:

"India sits at the top of the curve on visitation: high levels of weekly On-Premise frequency, paired with genuine optimism about spending power. India can no longer run as a satellite market, it's becoming the growth engine to benchmark against, and the discipline it takes to win there, occasion by occasion, is exportable to every other market chasing the same growth."



Bilal Habib
Vice President –
Global Clients,
NielsenIQ

How to Win – What brands must do

- Dig deeper into channel insight - category and brand performance shifts by region, outlet type and occasion; resourcing should follow the data, not assumptions.
- Actively manage the whole portfolio - look beyond your own category to the white space in the consumer's 5-category repertoire.
- Activate both online and at the point of sale - the path to purchase is phygital; partner with outlets and bartenders for one cohesive brand story

None of these levers works alone. Channel insight tells you where to invest, portfolio management tells you what to invest in, and phygital activation makes sure the message reaches the moment of choice.

India: The Engaged Market

India's On-Premise is one of the most engaged, most optimistic drinking-out cultures in the world – a rare bright spot as global visitation dips year-on-year.

Rising incomes, a swelling middle class and cities offering targeted bright spots, mean today's On-Premise numbers are a new opportunity. The next wave of volume is arriving from outside the metros that legacy strategies were built around.

India has one of the highest levels of beverage occasion engagement globally, with **87%** of consumers participating in the On-Premise channel and **72%** visiting weekly.



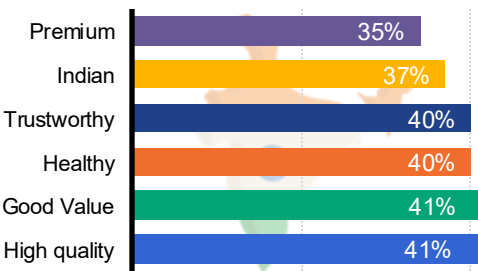
Reasons for visiting the On-Premise



Why they go and what they're chasing

Enjoyment, connection and celebration remain the emotional core of a visit - but the bar for a winning serve has moved. Consumers now expect brands to earn trust and prove value at the same time as delivering on high quality, not choosing between them.

Compared to 12 months ago, it is now more important to me that my drink is...

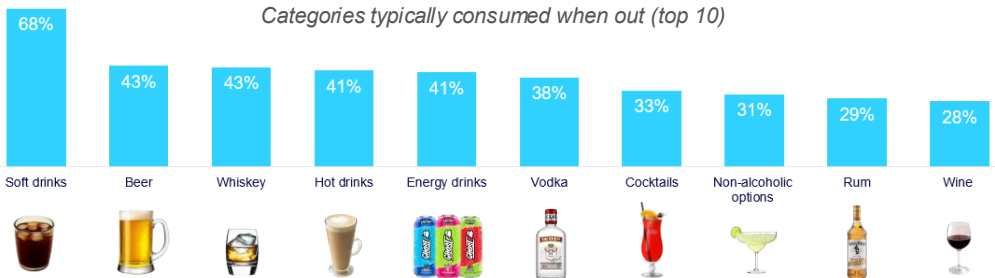


Indian consumers are increasingly spending on experiences rather than just products. **35%** of On-Premise spend is driven by event-led occasions, making it the largest spend occasion, while eating and drinking out remains the preferred way for consumers to treat themselves.

The Repertoire: Divided Loyalties

The average consumer keeps 5 drinks categories in active rotation. Beer and whiskey compete for the same occasion as soft drinks, energy drinks and cocktails - share of throat is won across the whole repertoire, not just within-category.

The frontline advocate - the bartender - has outsized power to tip that choice, making On-Premise professionals as strategically important to a brand as any media buy or in-venue activation.



Sources: NIQ On-Premise India RECH, sample 1002-1009/. OPUS Lite: India H2. Sample size 2504 NIQ On-Premise APAC REACH 2025, Asia REACH 2025. .

Here’s what industry experts are saying:

In this competitive market, success will come from understanding trends and adapting. Consumers are curating their own drinking life across categories, multiple formats and a feed that never stops scrolling. Winning share of throat in India means tailoring strategies to the right occasions, the right segment and driving relevance, not just reach alone.



Sujoy Das
Commercial Director,
India
NielsenIQ

The takeaways

- India is the global On-Premise growth engine. India is compounding growth while visitation stalls or declines elsewhere.
- Share of throat, not share of category, is the real battleground. Consumers rotate across categories and are demanding quality and value at once, not trading one for the other.
- The path to purchase is now phygital, powered by bartender advocacy and social feeds. Brands that invest in bartender advocacy and content built to travel natively on social will win both the discovery moment and the in-venue moment.
- The female consumer is the single largest unclaimed opportunity in the category. The manufacturers who move first to design authentic, control-and-quality-led propositions for her will close a gap competitors haven't even noticed yet.

The New Rules of Alcobev: Choice, Content and the Changing Consumer

Four forces rewriting the Category. From limited choice to limitless expression

More choice is not just expanding what India drinks – it’s redefining how India expresses itself through drinking.

These forces mean the product on the shelf is only ever the starting point. Format, pack and channel are now as expressive as the liquid itself, giving brands far more surface area to build distinctiveness and justify a premium.

From Discreet to Designed

From Drinking to Performing

From Product to Experience

From Private to Participative

Content is the new currency

When discovery, decision and social proof all happen on the same feed, brand-building can no longer sit downstream of media planning. Creative, packaging and even venue partnerships now need to be built to travel natively as content, not just advertise it.

Social media is becoming more relevant for the alcohol industry. And alcohol is no longer marketed as a product, but as a shareable experience.

India is becoming a digitally influenced beverage market, with 82% of consumers visiting a venue after seeing it on social media and 66% trying a drink discovered online.

The diagram illustrates a cycle where social media influences alcohol consumption. It starts with 'Social = decision making' at the bottom left. An arrow points up to 'Higher trust & engagement vs. traditional ads'. From there, an arrow points right to 'Much more targeted than mass media'. Another arrow points down to 'Consumers become content creators + brand advocates'. Finally, an arrow points left back to 'Social = decision making'. A side note says 'If doesn't show on social, it doesn't exist'.

Meet Her: Women and Representation in Alcobev

The opportunity here is a recalibration of how the category represents them. How the industry still show her includes “light & fruity”, pink-coded packaging, decorative and not a real decision-maker. Brands that get this recalibration right won’t just win this segment; they’ll close a gap competitors are falling behind on.

How we still show her

- “Light & Fruity,” pink-coded packaging
- Party-girl tropes, token cameos
- Decorative – not a decision maker

How she actually drinks

- Whiskey neat, confident beer after work
- Solo unwind and Small, intentional gatherings
- Deliberate: “I drink if I want to”

Three Moves to Close the Gap

01

Drop the gendered codes

Retire pink-coding, build creative around everyday, mixed contexts

02

Build for control & quality

Smooth flavour-forward formats, RTDs and low ABV

03

Own the space

Claim authentic representation before a competitor



Looking for more?

NIQ’s Full View™ integrates On-Premise, Off-Premise, online and direct-to-consumer sales data to provide seamless analytical capabilities delivered in an intuitive self-serve platform that empowers clients to identify threats and opportunities, growth-driving market trends and headroom opportunities. Contact your NIQ representative to learn more about available solutions in India for beverage alcohol.