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NIQ 2026
Channel Strategy Study

Maximizing beverage opportunities across key On Premise channels by exploring consumer needs and behaviors in differing venue types

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Channel Strategy Study 2026

NIQ are re-launching the US Channel Strategy Study for 2026, following significant demand and feedback from clients.

BENEFITS FOR SUPPLIERS



Understand **how consumer needs differ** across 11 On Premise channels



Prioritize resources and investment based on consumer behavior and channel opportunity



Track shifts in behavior and measure existing strategy effectiveness



Build more **targeted strategies**, tailor activation and brand positioning



Identify **untapped opportunities** in strategically important channels

KEY DATES

1. **Detailed intro and early commitment opportunity** *Until 11th September 2026*
2. **Fieldwork** *August + Sept '26*
3. **Reports Available** *From Oct '26*

NEW CONTENT FOR 2026

- Overall consumer financial outlook
- Overcoming barriers to consumption across channels
- Dwell time within the path to purchase
- Where, how and why consumers are moderating alcohol consumption
- More nuanced look at types of functional beverages consumed per channel

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A complete view of consumer behavior across 11 channels

- ✓ **Channel deep dives** across core and underrepresented On Premise channels, including stadiums, airports and outdoor events
- ✓ **Consumer profiles and indicative channel sizing**, helping you understand who visits each channel and the scale of the opportunity
- ✓ **Occasions, missions and needs states**, uncovering what drives venue choice, category selection and consumer behavior
- ✓ **End-to-end path to purchase insights**, from visit planning and venue selection through to in-venue drink decisions
- ✓ **'Last visit' analysis** including planning and drivers, brand and category selection, serve consumption and path to purchase
- ✓ **Brand awareness, consideration and preference** metrics to identify opportunities to grow penetration and win consumers

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What channels are covered in Channel Strategy 2026?

The core report offers a topline view of 11 key On Premise channels. Each of the deep-dive reports offer specific channel focussed insights, enabling brands to tailor their strategies and maximise success in 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)

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What's new for 2026...

Overall consumer financial outlook



- Consumers' current financial situation and their confidence in On Premise spend
- Predicted changes to finances among consumers in the next 12 months

Get a read on consumers' spending mindset and future purchasing power in order to understand immediate and emerging demand pressures

Barriers to consumption



- Factors that discourage alcohol purchase among channel visitors, and how this differs by venue

Identify the main barriers to purchasing alcohol across each venue type in order to reduce friction in the path to purchase and best tailor strategies by venue

Dwell time in venues



- Trip length on last visit across each channel

An enhanced metric in the detailed path to purchase, providing richer insight into channels with more dwell time/extended spend

Moderation



- Alcohol consumption levels by channel vs a year ago
- What channel visitors are doing to moderate their alcohol consumption
- Reasons behind alcohol moderation for specific channel visitors

Understand if/in which channels moderation is occurring, as well as how to navigate this, including identifying opportunities to retain consumers by meeting their changing needs

Functional beverage types



Functional beverage consumption type by channel including:

- Drinks containing THC (with or without other active ingredients)
- Drinks containing CBD
- Drinks containing Adaptogens
- Drinks containing Antioxidants/Vitamins
- Drinks containing Nootropics
- Protein drinks

Provides insights into the prevalence of this emerging category across channels, with watch-outs to help brands tailor strategy

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LAST VISIT

	The last time a consumer visited a premium bar…	**Where sample allows…** We can split the data by brand drinkers, sub-category drinkers and more, over 11 channels, with 20+ subchannels*
Sub-channel visited	**they visited a cocktail bar…**	**5 subchannels to explore**
When visit was planned	**They decided the day before…**	**7 answer values**
Drivers for choosing specific venue	**and chose that venue because they wanted to check out a new spot…**	**22+ answer values**
Food v drink-led visit	**they went for drinks…**	**Food-led, drink-led or both?**
Occasion visited for	**for a celebratory occasion…**	**22+ occasions**
Reason visited (need states)	**for a treat/reward…**	**15+ need states**
Who they visited with	**they visited as with a small group of friends…**	**7 group makeups**
Day of the week visited	**on a Friday…**	Monday-Sunday
Time of day visited	**evening at around 6-10pm…**	**All encompassing list** of day-parts
Length of visit	**and stayed for between 2 – 3 hours**	**NEW FOR 2026**
Spend per head on visit	**They spent $30 per head on drinks when there…**	
Drink categories consumed	**and drank vodka, and cocktails.**	**24 drink categories included in last visit**
No. serves	**They had 2 serves of vodka, and 2 cocktails**	No of individual serves captured **for each category consumed**
Drink choice: pre-venue or in-venue	**They had decided what they would drink beforehand…**	
Influences before visit	**As they looked at the menu beforehand**	**17+ influences pre-visit**
Did they change their mind when there?	**but changed their mind when they were in the venue…**	
Influences on change of mind	**because of bartender/server recommendations**	**15+ in-venue switching influences**
Influences when decide in-venue	*Available*	**18+ in-venue influences**
Did they switch brand/cat on a visit?	**They switched their drink category and/or brand when there…**	**Did they switch category, brand or were they loyal to one brand?**
Why did they switch categories?	**because they wanted to try something new...**	**22+ switching influences**

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Category detail by level

Channel Strategy 2026

Total level to cut by	**Category drinkers, Sub-category drinkers, Brand drinkers**
Channel level to cut by	**Consumers who drink the category and sub-category within the channel inc. serves**
Path to Purchase level *(Actual consumption on last visit)*	**Category detail:** • Table/still wine (red, wine, pink/rose) • Champagne/sparkling wine • Domestic beer • Imported beer • Craft beer • Vodka • Rum • Brandy/Cognac • Tequila • Mezcal • Gin • Whiskey • Cocktails (e.g. Margaritas, Pina Coladas) • Other speciality liquors, cordials & aperitifs/digestifs • Canned/bottled flavored alcoholic beverages • Shots/shooters • Non-alcoholic beer • Non-alcoholic cocktails • Non-alcoholic wine • Soft drinks • Energy drinks • Sparkling water • Functional Beverages

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The Core Report designed for Channel Strategy Development

The Core Report provides a holistic overview of 11 channels that form parts of the wider On Premise.

The comprehensive overview allows Insight teams to fully understand the most prevalent consumer profiles in each channel; which channels are most important/valuable for your brands and where your resource and planning should be focused on.

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 identify the channels that offer the greatest commercial opportunity, helping you align growth potential with your brand portfolio

Understanding the target consumer profile per channel

- What are the key characteristics of consumers for each channel? How do they align or differ in relation to experimentation, definitions of value for money and receptiveness to premium offerings, etc. ?
- For what occasions are consumers visiting channels? How does this align with their need-states?
- What does drink category consumption look like and how does it differ across venues?
- What should drink offerings look like by channel, based on consumer preferences? What encourages brand loyalty and switching?

This will identify the channels where your portfolio has the strongest resonance with target consumers, helping to focus investment on the greatest growth opportunities

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Channel Deep-dives

Once the most pertinent channels for your brand portfolio are identified, the second set of deliverables will enable Brand, Marketing and CP&A teams to explore the detail within a specific channel to further focus strategies

These individual, low cost, channel reports will provide granular insights into each channel's key dynamics to inform strategy and planning, uncovering how to position your brands most effectively against competitors.

What does a great channel experience look like for consumers and, therefore, 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:

- What role do signature food and drink offerings play in attracting consumers to different venue types, and how does this compare with the impact of loyalty programmes and promotions?
- To what extent do location, atmosphere and channel-specific events influence visitation?
- How important are previous positive experiences in the channel and how is this defined e.g. great service, high quality drinks?

What are the reasons for visiting the channel, and what are the differences by demographic?

- When are visits planned and how, if it all, does this differ by sub-channel visitors?
- What needs are they looking to fulfil on their visit to the channel? How do occasions (e.g. romantic occasions or quick visits) align these with need-states (e.g. the desire to socialize, relax, let loose)?
- How do dayparts and group type influence behavior? How does this correlate with occasions?

What does drink category engagement look like, and what is the decision-making process?

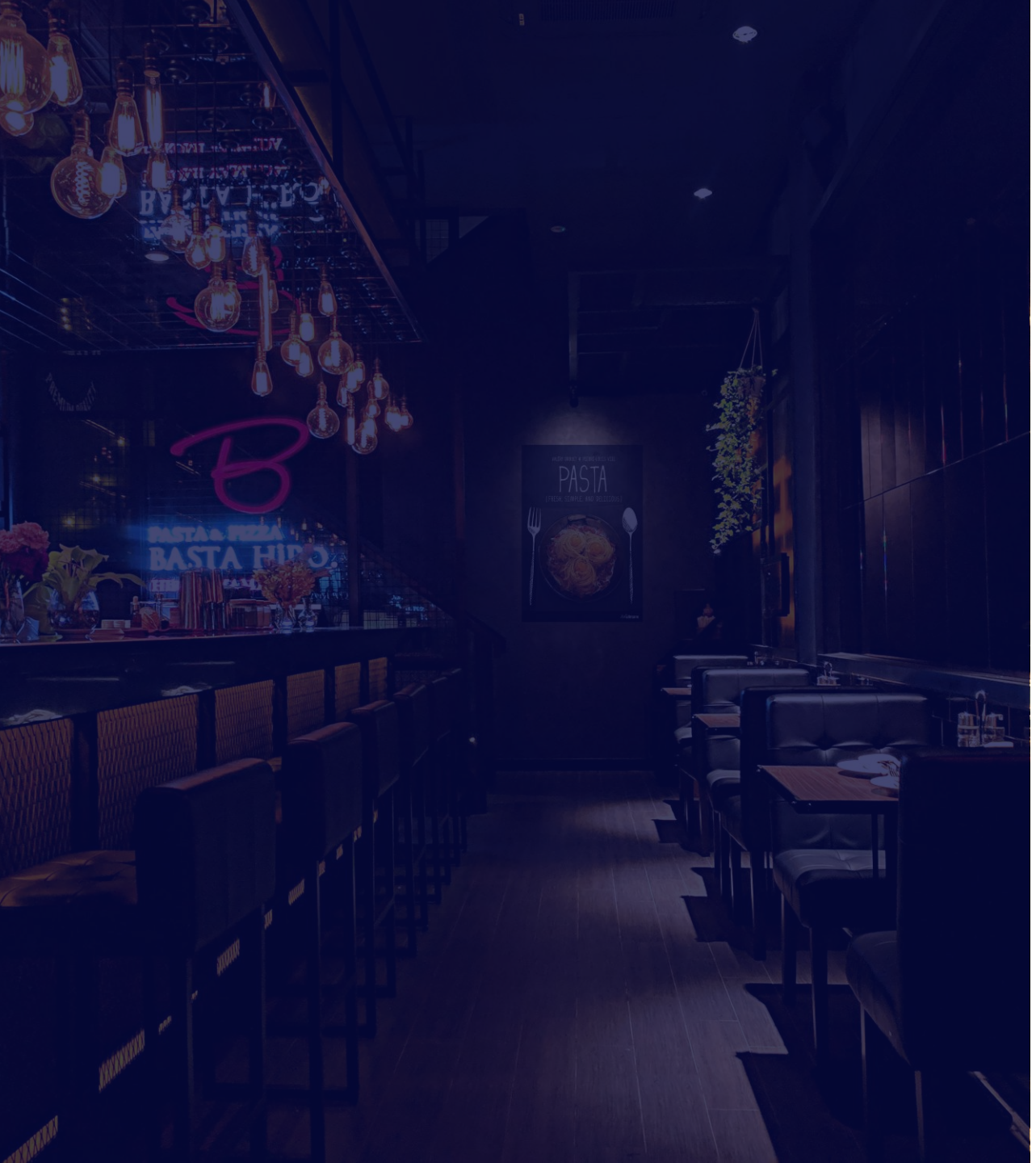
- What categories and sub-categories perform best? How do consumers prefer their drinks to be served?
- What is the maximum amount consumers are willing to pay for a category when visiting each channel?
- How and when do consumers make their drink choices? Do they switch categories or brands during their visit?

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 allow you to understand how best to position and promote both new and existing offerings across channels, based on where the key growth opportunities lie for your brand portfolio.

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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 November and December

+ Option to unlock full data set in Distilr 360

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Contact Us

For more information on how NIQ's Channel Strategy Study can drive your business growth, get in touch:



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