



An introduction to the On Premise user in Vietnam

OPUS Vietnam- December 2022

CGA by NIQ



91%

of On Premise Users surveyed
in Vietnam have visited the
sector in the past three
months

87%

of On Premise visitors visit the
channel at least weekly



Already a highly engaged audience, consumers in Vietnam are keen to increase visits further in 2023, highlighting the volume opportunity provided by the sector

3 in 4

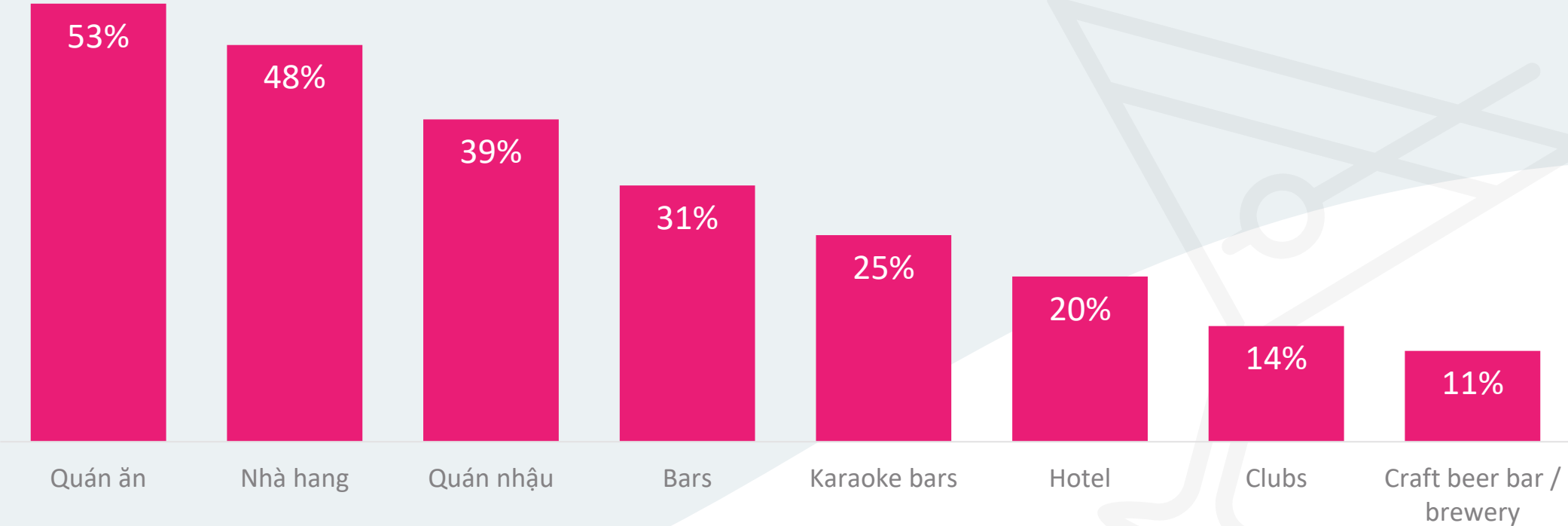
Consumers predict that they will visit On Premise venues more frequently in 2023 compared to how often they visited in 2022

Source: CGA OPUS Vietnam December 2022, sample size: 4973



Food-led venues are the most popular On Premise channels visited, led by Quán ăn, while beer gardens and bars are also popular channels for consumers in Vietnam

Which venues would you typically visit in a 3 month period? Please select all that apply



Source: CGA OPUS Vietnam December 2022, sample size: 5000



The Vietnamese On Premise is vast, with significant differences within channels offering opportunities to create distinct winning channel strategies

Primary channels visited		Sub-channels visited / Reason for visit				
Quán ăn	53%	With VIP Rooms 49%		Without VIP Rooms 39%		I don't know 21%
Nhà hàng	48%	To both eat & drink 80%		To eat 15%		To drink 5%
Quán nhậu	39%	To both eat & drink 85%		To eat 7%		To drink 8%
Bars	31%	Modern Bar 60%	Cocktail Bar 45%	Traditional Bar 37%	Lounge Bar 23%	I don't know 0%
Karaoke bars	25%	Friends/Family KTV 71%		Business KTV 48%		I don't know 4%
Hotel	20%	3 Star or below 50%		4 Star or above 65%		
Clubs	14%	Modern Club 82%	Traditional Dance Club 41%	Night Club / Lounge 65%		Beer Club 64%
Craft beer bar / brewery	11%					



Top drivers for consumers in choice of where to visit centre around the core elements of a hospitality offering; quality, service and good value

Which of these are important factors in your choice of where to eat or drink out?



On Premise drinks consumption spans multiple occasions, providing both volume opportunities during high tempo and value opportunities for special occasions

Which of the following occasions would you typically go out for and have drinks? Please select all that apply



50%

High tempo drinks (e.g. a big night out)



49%

Special occasion (e.g. birthday, anniversary)



40%

After work drinks



31%

Relaxed / quiet drinks



25%

Formal meal



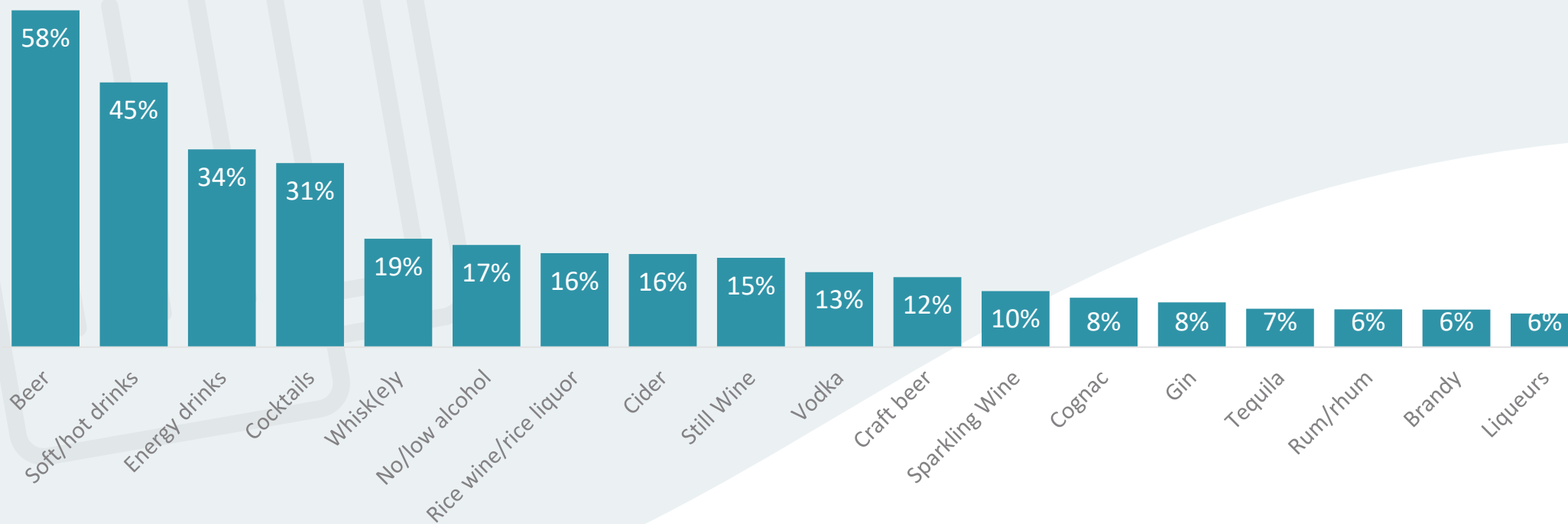
21%

Casual meal



Beer is the dominant category in the Vietnamese On Premise, while spirits consumption centres around cocktails and whiskey

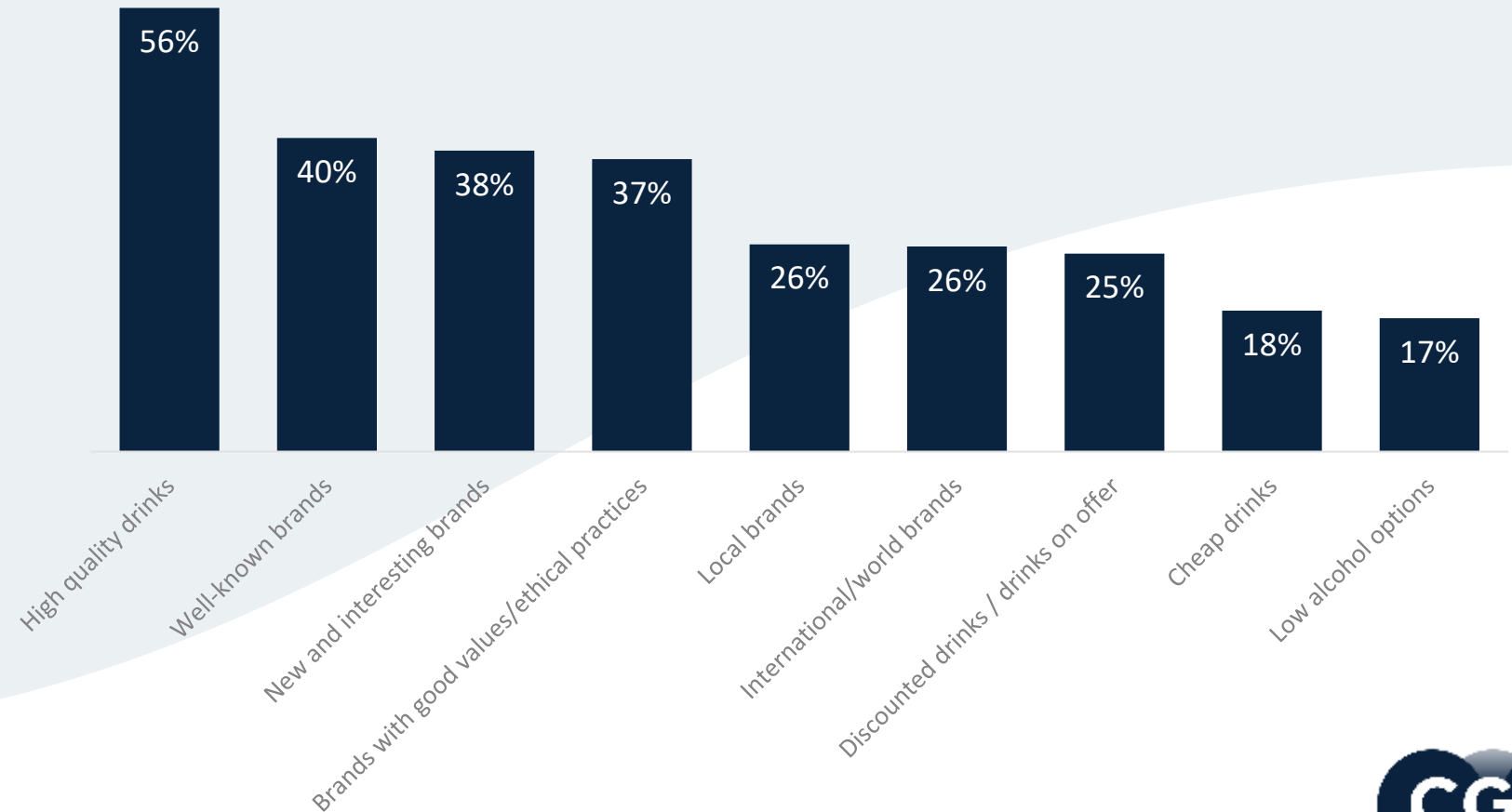
Which of the below drinks do you typically drink out of home (for example, at a bar, restaurant or other similar venue)?





The Vietnamese On Premise is a land of treat and trial, with consumers looking for quality and, despite 2 in 5 seeking well-known brands, the same proportion also seek new and interesting brands

When choosing what to drink out at a venue, which, if any, of the following are important to you?



Source: CGA OPUS Vietnam December 2022, sample size: 5000

Further evidenced by the

1 in 2

Consumers who have
purchased both new and
familiar drink brands when out
in the past 3 months

The Vietnamese On Premise also offers a premiumisation opportunity...

82%

of consumers state they are likely to pay extra for a better quality drink when eating/drinking out

(vs 4% unlikely)





The Tết opportunity –
Lunar New Year in the On Premise



97%

Of On Premise Users in Vietnam plan to visit the sector during the Tết holidays

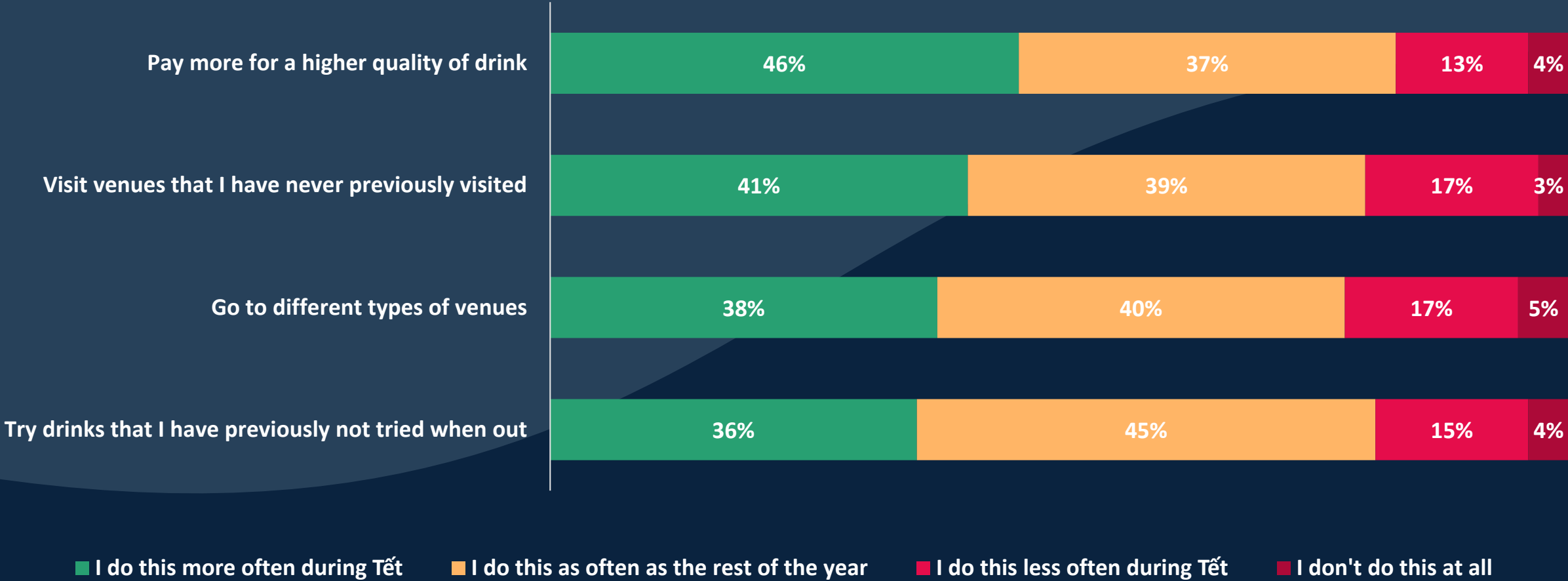
49%

Of On Premise Users plan to visit the sector more frequently than usual during the Tết holidays

(Vs. 15% who plan to visit less)

The holiday season brings further trade up and trial opportunities, as consumers in Vietnam change from their usual habits during the period of Tết

Thinking about your behaviour over the period of Tet holidays, do you do any of the following?

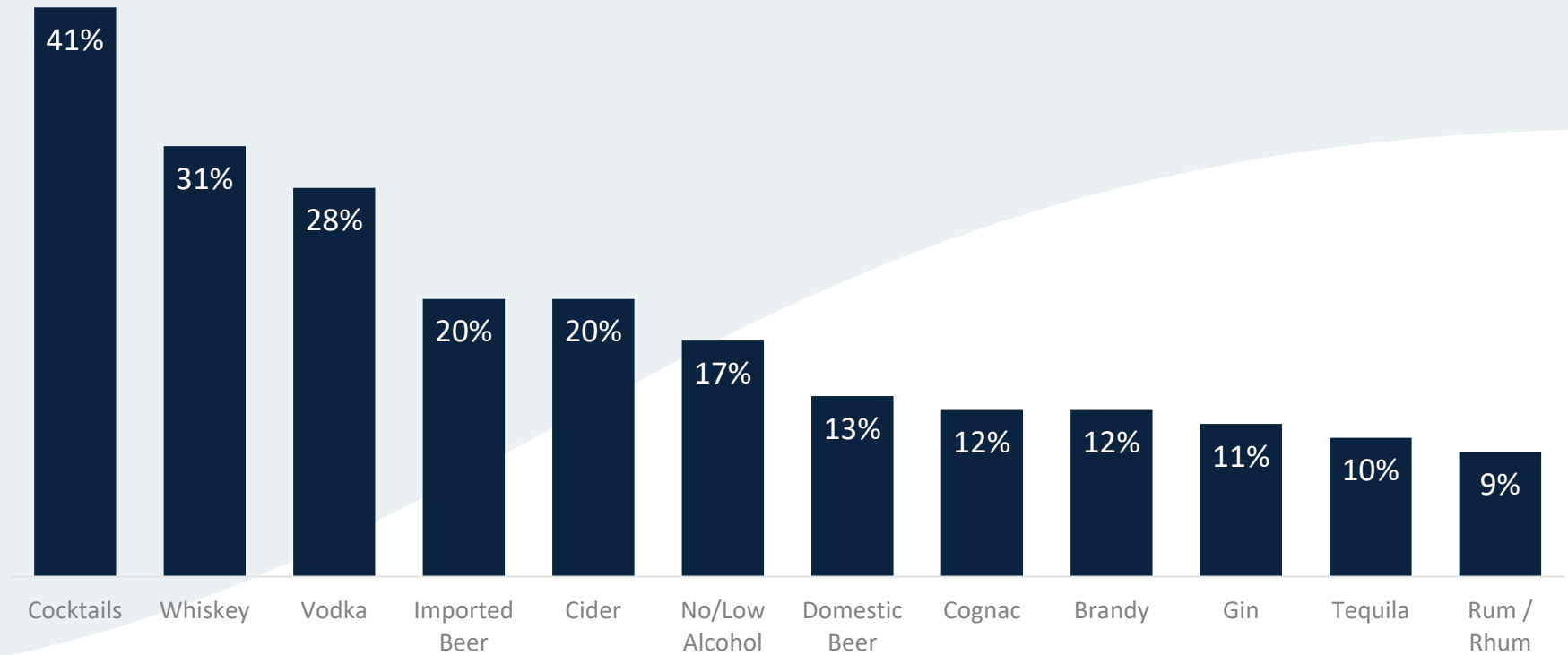


Source: CGA OPUS Vietnam December 2022, sample size: 2071 - 2108



Tết provides a significant trade up opportunity for spirits, and cocktails in particular, allowing for targeted campaigns to encourage trial

You have said that you pay more for a higher quality of drink when out during Tet holidays. Which of the following types of drink do you pay more for during Tet than you usually do? Please select all that apply



Source: CGA OPUS Vietnam December 2022, sample size: 960



Contact Us

NIQ and CGA have a dedicated team to support on all On
Premise questions



Scott Elliott

Managing Director: APAC

scott.elliott@cgastrategy.com



Amy Warren

Director of Global Client Success

amy.warren@cgastrategy.com



Charlie Mitchell

Research & Insights Director

charlie.mitchell@cgastrategy.com