

Understanding the On Premise consumer in Southeast Asia

On Premise User Survey (OPUS)



Why trust CGA as your consumer research partner?



On Premise Expertise

CGA is the only agency specializing in the intricate On Premise sector, offering unmatched expertise



Global Thought Leadership

CGA seamlessly integrates On-Premise context from various sources through our dedicated specialists



Strategic Partnership

CGA's experts seamlessly collaborate to offer actionable insights and strategic recommendations tailored to your unique brand

OPUS: On Premise User Survey

Unveiling Key Aspects of Consumer Interaction for Informed Decision-Making



Extensive Global Presence

Offering a panoramic view of On Premise market trends, OPUS engages users in 20 countries worldwide: USA, Canada, Mexico, UK, Ireland, France, Italy, Germany, Netherlands, Japan, South Korea, Vietnam, Taiwan, Malaysia, Indonesia, Philippines, Thailand, Singapore, Australia & New Zealand



Trusted by clients across the globe

OPUS is a trusted resource embraced by clients globally for its ability to provide foundational insights into consumer interactions with the On Premise channel. OPUS empowers businesses with the knowledge they need to make informed decisions and stay ahead in the competitive market.

Why should you trust OPUS?

- + **Unparalleled On Premise Specialization:** OPUS excels as the primary source for On Premise channel insights, specifically tailored for the complex spirits category, including cocktail and mixed drink preferences.
- + **Industry Trust:** Trusted by leading beverage companies globally, OPUS has established itself as a reliable platform, reflecting its credibility and effectiveness in delivering actionable insights.
- + **Expert-Driven Deliverables:** OPUS insights are curated by genuine On Premise experts, ensuring a nuanced understanding of the beverage industry and enhancing the quality and relevance of the information.
- + **Empowering Sales Conversations:** Uniquely enabling insight-driven sales conversations, OPUS equips beverage brands with detailed consumer profiles, providing a competitive advantage in the market.
- + **Holistic Brand Insights:** Beyond sales, OPUS offers comprehensive brand and marketing insights, providing a 360-degree view of On Premise consumers for refined strategies and meaningful engagement.



OPUS Spirits

Southeast Asia

- + **Indonesia:** Examining 2,000 consumers in Jakarta, Bali, and Surabaya's On Premise for insights into their habits and preferences.
- + **Philippines:** Surveying 1,500 city centre-based consumers in Manila, Quezon City, Davao City, and Cebu City to gain category insights for International spirits.
- + **Thailand:** Gathering data from 1,250 spirits drinkers in city centres, including Bangkok, Pattaya, Chiang Mai, and Phuket, focusing on On Premise outlets.
- + **Malaysia:** Analyzing a sample of 1,000 spirit drinkers in On Premise settings, with splits for Kuala Lumpur, Ipoh, Malacca City, and George Town.
- + **Vietnam:** Investigating 2,000 spirits drinkers in Hanoi and Ho Chi Minh's On Premise, emphasizing city centre consumers.
- + **Singapore:** Surveying 750 spirits drinkers in the On Premise, particularly those who frequent On Premise establishments.

An online study spanning 6 countries and 8,000 consumers, targeting vital consumers for strategic insights in the most important cities to build winning strategies



CGA's Research Approach

To confidently build strategies in SEA On-Premise, CGA's approach balances robust scale and deep context, providing essential insights



Phase 1: Quantitative

Online OPUS SEA study covering Regional and Local Market trends



Phase 2: Qualitative

A package of in-person interviews, intercepts and observations



CGA Research Snapshot

Phase 1a: OPUS SEA Regional Insights

- Prevalence of On Trade planning
- Macro factors influencing On Trade planning
- Global comparisons to add context
- Spirits category decision making
- Cocktail insights
- Brand profiling for On Premise consumers
- Occasion and channel insights

Phase 1a: OPUS SEA Regional Insights

General understanding of consumer behavior in the On Premise, both globally and regionally

Phase 1b: OPUS SEA Market deep dives

Specifics of spirits decision-making through various lenses:

- Venue type
- Demographics
- Category & subcategory
- Country / key city
- Occasion
- Pre-visit vs in-venue

Phase 1b: OPUS SEA Market deep dives

General understanding of consumer behavior in the On Premise, both globally and regionally

Phase 2: In-person Insights

Face to face research to understand specific dynamics

Phase 2: In-person Insights

General understanding of consumer behavior in the On Premise, both globally and regionally

SAMPLE SLIDE

The On Premise provides a welcoming social setting for reconnecting with friends and family, allowing consumers to enjoy quality time together

You have said that you are currently going out more frequently than you were 3-months ago, why is this?



To see family and friends

37%



I am less worried about COVID-19

27%



My friends and family plan to go out more

26%



I am treating myself

25%



To make up for what I have missed out due to COVID-19

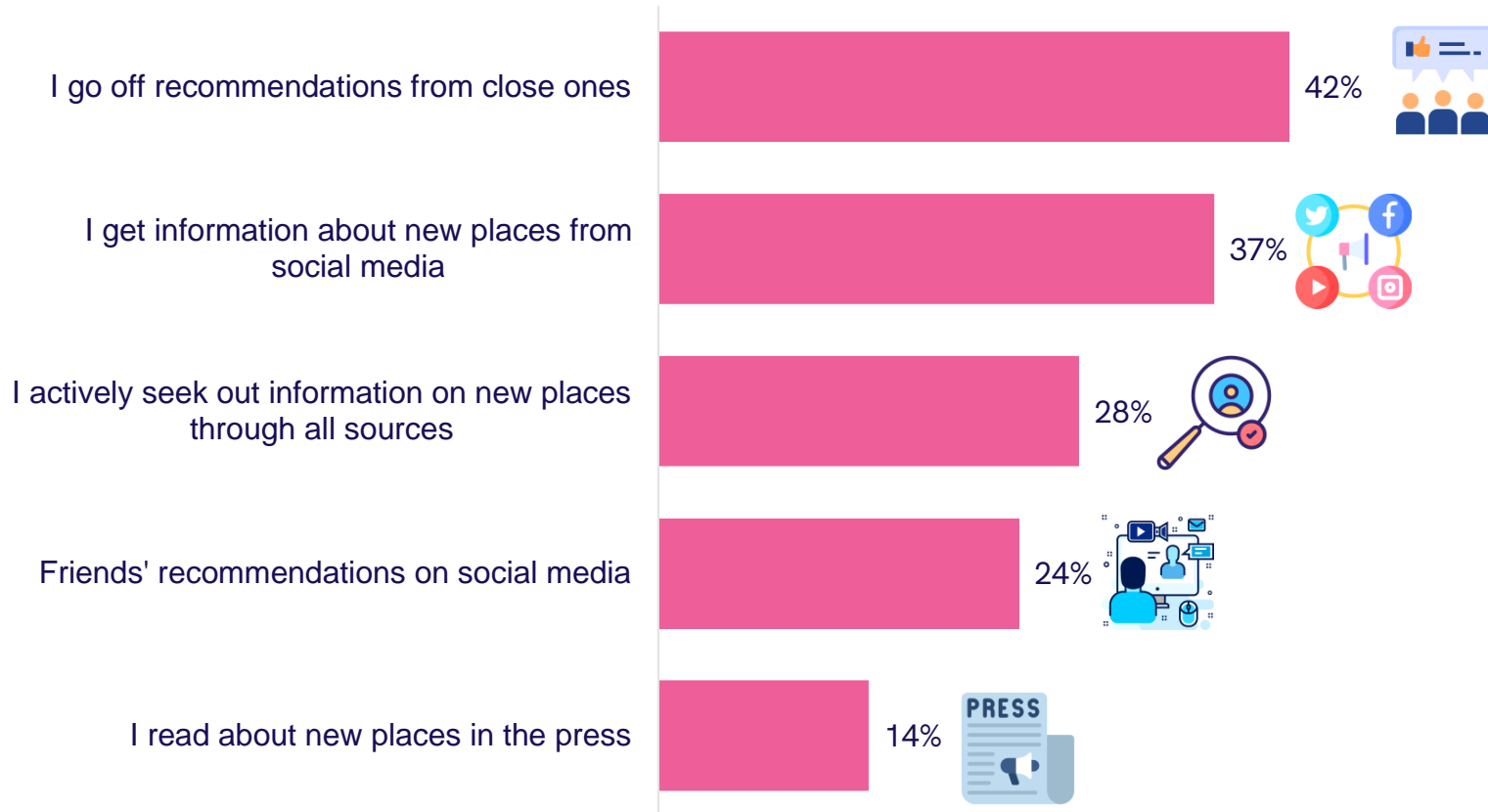
23%

Source: CGA OPUS South Korea September 2023, sample size: 658

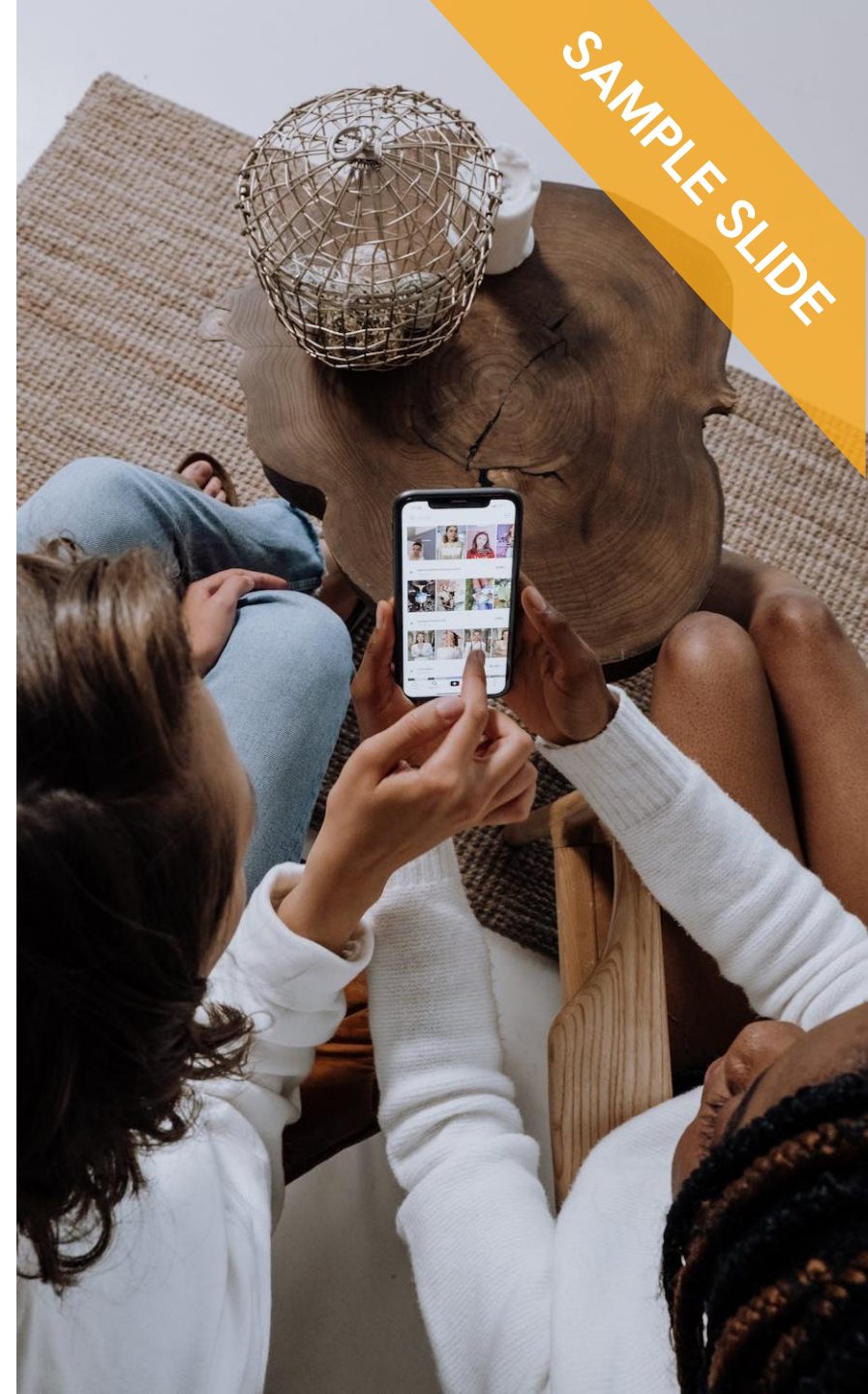


Brand advocacy is powerful across friend and family recommendations and social media engagement with brands themselves and reviews when deciding which venues to visit

How do consumers get information about new places



Source: CGA OPUS South Korea September 2023, sample size: 4011



Experimentation is prevalent for venues within the On Premise, however many consumers are relying on recommendations before trialling or choosing more established venues

When it comes to trying new places to eat and drink out at ...



I am typically one of the first to visit new eating and drinking brands and I am constantly looking for new and unknown brands to visit

16%



I enjoy visiting new eating and drinking out brands whilst they are still small chains but are starting to become recognised

12%



I am open to trying new eating and drinking brands but I tend to wait on recommendations from others and reviews until I decide to visit

38%



I am sceptical of new eating or drinking brands and so I tend to visit them once many of my friends/family/colleagues have already visited and had good experiences there

13%



I tend not to visit new eating and drinking brands, instead choosing to visit well established brands which I have been visiting for years

22%

Additional Capabilities: Consumer Solutions available across Asia



Custom RFP Support Decks

Take banner-specific sales stories to national account customers to give insights on not just your product but the market at large. Profile and compare your brand's consumers with their guests to discover synergies



Consumer Segmentation

Enabling clients to more strategically and effectively target drinkers with messaging and offerings that relate to them, ensuring \$ are spent more effectively in On Premise brand building.



Optimum Assortment

CGA's first assortment tool allows you to enable your teams to go to showcase the optimal range for outlets and highlight where brands should be placed within a range to achieve highest sales and increase customer satisfaction.



Custom On Premise Research

From online surveys to focus groups to in-outlet interceptions, CGA has access to millions of consumers across the world to answer your most important questions.



Path to Purchase

How consumers make choices in outlet has drastically changed. Which levers can be pulled and where? Understand the decision corridor consumers go through when purchasing a drink.



Bartender Research

Bartenders and servers are the final touch point of influence in the channel. With such change understanding advocacy and bartender needs can lead to influential sales of your products.

Custom Consumer solutions from CGA

Tools to test marketing and sales materials before launch and to measure effectiveness in-outlet



Influencing the Bartender

Learn how bartenders perceive your category/brand, how they recommend and what you can do to influence this so you can have a direct and tangible impact on the path to purchase and drive sales to your category/brand by influencing the influencer.



Optimizing the back bar

Unlock the most effective back bar strategy for your brand and test different designs with consumers, to provide you with data-led recommendations for operator partners to best position your brand on the back bar and then measure the ROI to enable you to invest in the right space and drive sales.



Optimizing menu design

Test menus to understand the best layout and placement for beer and your brands, inc. price points and specials. By optimizing the menu design, you and partner operators can have the biggest influence on consumers and their drink choice, driving sales and maximizing revenue.



Optimizing PoS marketing materials

Test designs of PoS materials and merchandise for a specific brand, to assess the impact on consumer perceptions and likelihood to purchase, removing the risk of launching nationwide marketing programs by testing different ideas before investing.



The Perfect Serve

CGA can measure the impact of investing in training and implementation of the perfect serve for your brand, to provide you with an understanding of how the perfect serve grows sales for the brand and venue, and where future activation should take place.



Branding activations and menus

Test menu and promotion names to assess the impact on likelihood to engage consumers and lead to purchase. This can be used to support operator partners and the impact measured to ensure effective investment in launching these marketing programs.

Contact us to elevate
your brand strategy!



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