

PRE READ
CRISTAL
PREMIUMIZATION

Prepared for:



July 2026

PANAMA

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CERVEZA
CRISTAL
- EXTRA FINA -
COMO TIERRAS ALTAS



Study Objectives:

- **Determine how alcoholic beverages are perceived** and the key drivers of purchasing decisions.
- **Identify key needs and tensions** within the region.
- **Define relevant consumption occasions** (when, where, and with whom) including those associated to the premium segment.
- **Identify the factors that drive a higher willingness to pay** across beer and other alcoholic beverage categories.
- **Understand how categories and brands currently compete** within the region's key demand spaces.
- **Identify opportunities for Cristal** to strengthen its position and gain share within premium demand spaces.

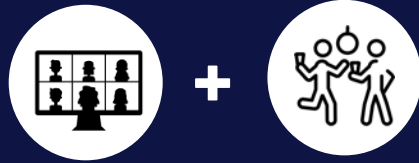
Key questions to answer:

- **What are the key unresolved tensions among upper-middle-class consumers in Chiriquí** that could support a premium proposition for Cristal?
- **Which brand territories** have the most potential to **support Cristal premiumization efforts** and can give the **brand permission to charge more** while protecting and aligning with its brand equity?



Methodology

WHAT



Mixed methodology
6 Video FGIs + 6 Immersions

WHERE



Chiriquí, Panama

WHEN



Video FGIs May 18 to 20
Immersions May 21 to 23

WITH WHO



Males and females
25 a 45 YO.
Beer consumers of at least once
per week.

VFG	Age	Social level	Profile
1	25-35	ABC+	<ul style="list-style-type: none"> • Drink beer at least once per week. • Mixed brands: mainstream + premium. • With a "Looking Good" need state in some of their consumption occasions.
1	36-45		
1	25-35		
1	36-45		
1	25-35		
1	36-45		
Total: 6 VFI's			

Immersion	Main participant age	Gender	Social Level	Location	Profile
1	34	Female	C+	Triple Play	<ul style="list-style-type: none"> • Drink beer at least once per week. • Mainstream + premium brands. • With a "Looking Good" need state.
1	39	Female	B	Casino	
1	34	Female	A	D'Coffee	
1	37	Male	B	Baristro	
1	30	Male	C+	D'Coffee	
1	40	Female	B	Hops	
Total: 6 Immersions					

ONE PAGER

BUSINESS QUESTION

Which territories can credibly elevate Cristal's perceived value, enabling the brand to charge a premium while strengthening and expanding its existing equity?

Among the territories evaluated, **"Natural Premium"** shows the **greatest premiumization potential and can best support an increase in the brand's pricing strategy** in a sustainable way.

This is because the territory builds on attributes associated with the brand's equity (naturalness, freshness, and connection to Chiriquí, which makes it credible) **and provides tangible quality credentials** (ingredients, certifications, production process, sourcing) **to offer a rationale for superiority vs. both nationals and imported alternatives.**

Nevertheless, to **maximize its premiumization potential**, the territory should be strengthened through three reinforcements: **a) Adding a layer of international recognition and world-class quality** to help overcome the origin barrier **b) Protect the current taste profile** assuring an upgrade and not a reformulation **c) Leveraging on the attribute of "Premium"** in packaging and communication.



"We have one of the best coffees in the world. It has been recognized internationally".

Main findings:

Consumers want to protect Cristal's taste. Any change or modification in flavor (craft beer, Cristal flavor innovation) should be implemented in a separate variety.

Brand colors (red, white, gold) should also be maintained.

Consumers consistently use origin as the primary pricing consideration. National beers compete against each other while imported beers occupy a premium reference frame.

For Cristal, increasing pricing is not only about increasing willingness to pay, but about changing the frame of reference itself

Chiricanos are expecting a price increase to be justified and accompanied by clear improvements or signs of superior value.

Chiricanos ask, "What else is Cristal giving me for charging a higher price?"

Recommendations:

- 1. Leverage on ingredients.** Consumers consistently linked premiumization to superior ingredients, naturalness, authenticity, and product quality. **International recognition / world-class and ingredients with a compelling story** further strengthen premium credentials.
- 2. Affordable Craft represents a true innovation for Cristal and aligns with Cristal's local ingredients and Chiriquí associations while building on authenticity.** However, **the territory should be addressed through partnerships** (like with Boquete Brewing Co.) to reinforce credibility. **Leveraging on local flavors** (coffee, strawberry) and **avoiding delivering a product that is too bitter** (to align with brand's taste profile) is also important.
- 3. Special editions represent a good innovation and engagement path but is weaker when considered for a permanent premium strategy.** For implementation, the local festivities theme is well-received, though using **themes that involve the entire country or aimed at uniting it would address an additional tension revealed:** *Chiricanos* are not comfortable with the way they are perceived.
- 4. Consider "Ultra Ligera" territory as the option with less potential.** Since, as a brand substitute, could lead to alienation of existing users, and, as a variety, addresses a need that Cristal already resolves.

What being *Chiricano* means:

Their identity is rooted in **hard work, community** and a **strong sense of regional pride**.

They are **proud of being Chiricanos**, describing themselves as **hard working people and go-getters** that live in a privileged and beautiful land.



There is an important sense of **community** and **camaraderie** among them and is usual for them to support each other whenever the can.



Their lifestyle is more **relaxed than in other provinces** and spending time with their families – and themselves – is very important.



They consider they are **often misunderstood** by other Panamanians who may perceive them as **cocky, self-centered and proud**.



Expressions like ***“We are the best part of the country”*** and ***“All the produce that feeds the country are grown here”*** reflect how Chiricanos perceive themselves as **providers for the whole country**.

As Chiricanos, they got certain **codes and regionalisms** – like ***“Ganado Bravo”*** and ***“Meto”*** – which sets them apart from other Panamanians. ***“We only use those here, it’s like our brand”***.

Success is **earned through effort** and measured by the **ability to build a good life while staying connected to one’s roots**, family, and values.

However, what others may interpret as arrogance is, in their view, **a reflection of genuine appreciation for a region** that produces and prospers through the hard work of its people.

They do not see themselves as superior to others; rather, they take pride in what they have built and achieved.

Brand and consumption drivers among *Chiricanos*:

They seek products that deliver **real quality, justify their price** and **align with their values**.

Quality needs to justify the price

Purchases are usually evaluated through a **cost-benefit lens**, where **higher prices are acceptable** when they are **backed by tangible quality, performance or utility**.

Trust is earned through proven performance.

From food products to vehicles, Chiricanos gravitate toward products that have **consistently delivered over time**.

Local origin is a powerful quality cue and brings an important emotional advantage

Products associated with Chiriquí benefit from **inherent credibility and emotional resonance**: Cristal, Geisha Coffee, Leche Chiricana, Café Kotowa, Bambito water.

International recognition of local products validates Chiricanos' pride.

Global recognition of local products (Coffee) reinforces Chiricanos' belief that **what comes from their region is genuinely world-class**.

As Chiriquí becomes more modern and developed, consumers are actively seeking new experiences and innovations, specially when they reinforce the traditions and identity that define Chiriquí

Nevertheless, **image, advertising, market presence, promotions and word of mouth** are also important drivers for curiosity, interest and trial.

Though good packaing and visual appeal is very important, premiunization should demonstrate tangible value.

Expressions of success, wealth and premiumness in Chiriquí

Success is often communicated through **achievement, land ownership, business success** and **quality choices**, while the **"Yeye"** identity is more associated with **visible status cues, brands** and **lifestyle signals**.



Success is communicated subtly through choices that signal progress while remaining grounded and authentic.

Without a category or occasion restriction, brands like **Boquete Brewing Company, Toyota Prado, Land Cruiser, Geisha coffee** and imported commercial beers can convey status due to their **quality, performance and/or origin**.



In upper-level and wealthy consumers, appearances can be deceiving: While they can be wearing exclusive branded clothing, their outfit can also be simple and work-appropriate.

"The wealthiest person here may appear to be the simplest one, they are the ones with caddle and land (...) you cannot judge people here as you judge people in the capital".

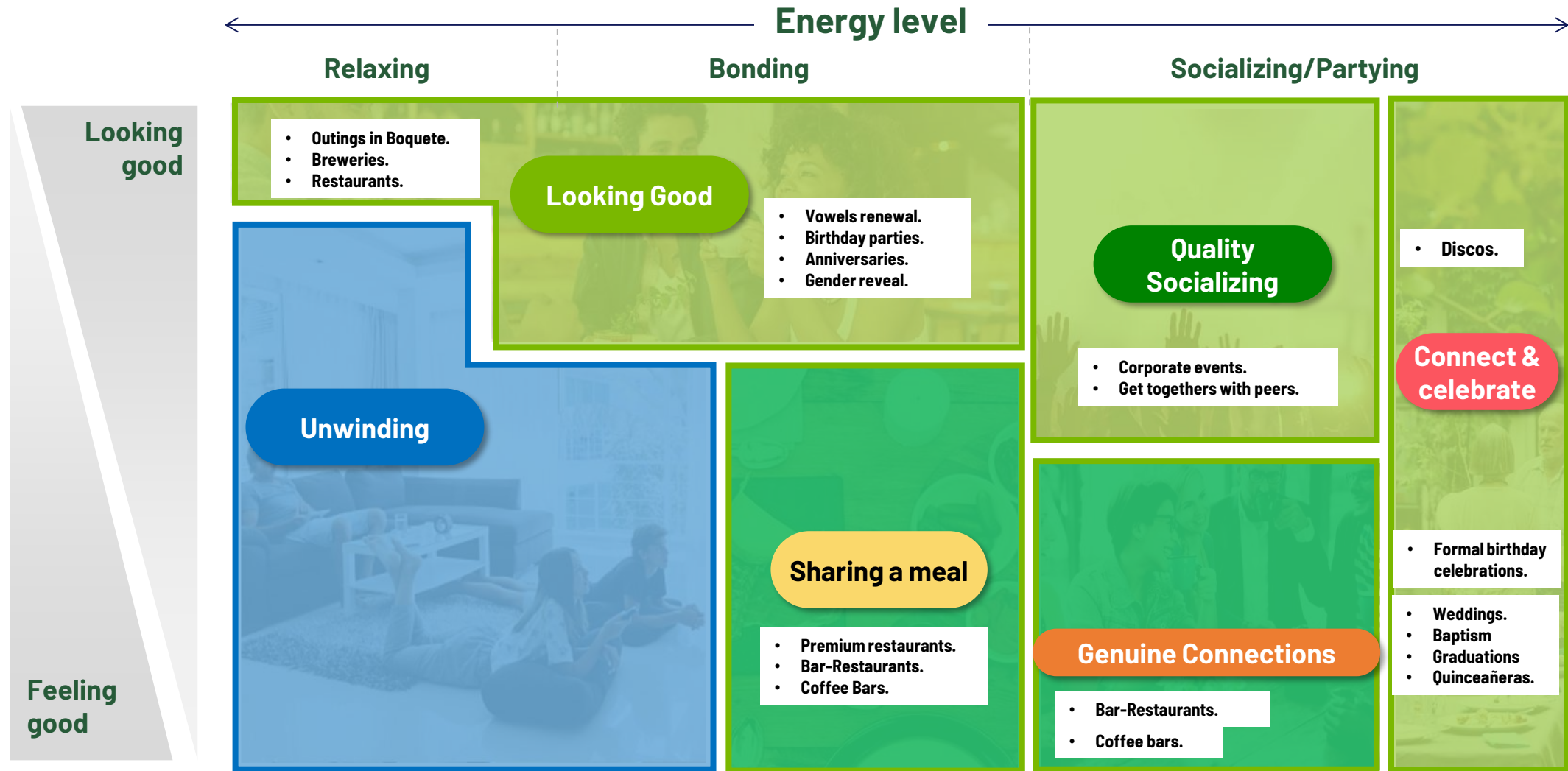


While a wealthy Chiricano can be simple. A yeye is defined more by image and consumption signals than by wealth itself – in which a "yeye chiviado" would come into play.

"A Yeye chiviado means he has the "pinta" but doesn't have the money".

Wealth can be discreet. Yeye is recognizable through visible status signals.

PANAMÁ DEMAND MAP – LOOKING GOOD IN PREMIUM OCCASIONS IN CHIRIQUÍ



Mostly looking good

Mostly feeling good though looking good also has a role

Beverages and brands with a role in premium occasions

Imported beers carry a perception of status and distinction, driven **mainly by their foreign origin** rather than superior quality.

Whisky: Has an important perception of exclusivity and high-class. Associated to refined and authority figures.



- Chivas Regal
- Jack Daniels
- Johnny Walker

Vodka & Gin: Associated with more sophisticated and evening-oriented consumption occasions.



- Absolut Vodka.
- Gin Bombay

Cocktails: Associated to socializing, variety and opportunities to take an Instagram picture.



- Mojito
- Apple Spritz
- Sangría

RTD: Associated to women and “yeye” social circles. In some settings, they can act as subtle social markers due to the groups they are associated with.



- Smirnoff
- Adán y Eva

National Beers: Their presence in premium occasions stems from their strong cultural relevance and broad social acceptance.



- Cristal
- Panamá
- Balboa

Wine: Most common in food pairing and women outings on weekdays.



- No specific brands.

Rum: Plays a role in celebrations and memorable occasions, serving as an accessible way to elevate a moment. More embedded in local culture than aspirational.



- Bucanero
- Ron Abuelo
- Zacapa.
- Carta Vieja
- Bacardi

Imported Beer: Chosen when consumers want to elevate the occasion or signal a more sophisticated taste.



- Corona.
- Miller Draf
- Heineken.
- Coors Light.
- Michelob.

Craft Beer: Premium due to local provenance, quality, limited production, distinctive flavor, higher price point and aspirational appeal of Boquete as destination.



- Boquete Brewing Co.
- Rana Dorada

Rather than signaling status or exclusivity, national beer brands are trusted choices that comfortably fit gatherings across different social groups.

Tensions validation: Easy Discovery

Craft beers are perceived as **gateway to new flavors, experiences** and a **more sophisticated drinking repertoire**, however, **bitterness, heaviness** and **bloating** limit repeated consumption.

Craft beer satisfies the desire for exploration but function more as an occasional experience than an everyday or usual choice.

So how are consumers who avoid craft beers (due to bitterness or bloating) satisfying their need for an interesting alcoholic beverage experience and variety?

When it comes to craft beers, they are perceived as a **good option for those who want to try new flavors** and can also transmit **sophistication** and **knowledgeability**, due to their **elaborated process, flavor peculiarity** and **exclusivity**.

However, their **flavor** and **heaviness** can alienate several consumers or **make it a sporadic and venue-centered** option rather than a usual, frequent one.

Consumers are turning to **imported brands** (Coors Light, Heineken, Modelo) **other liquors** (Rum) or **cocktails**.

Nevertheless, existing solutions satisfy consumer's need for variety or exploration **but they also imply trade-offs in premium occasions:**

BEVERAGE	DELIVERS	GIVES UP
Craft Beer	Discovery & sophistication	Drinkability
Imported Beer	Status & distinction	Local relevance + Meaningful innovation.
Whisky	Prestige & authority	Accessibility. Drinkability.
Rum	Celebration & Empathy	Drinking for longer.
Cocktails	Variety & experience	Local identity.

So what is the gap or tension that remains unsolved?

Consumers **currently trade off drinkability, local relevance, status, accessibility or sophistication** depending on the beverage they choose.

No alternative fully delivers all of these benefits at once.

This implies an opportunity to **deliver discovery and sophistication within a beer format that remains approachable and highly drinkable.**

Tensions validation: Functional Benefits

An alcoholic beverage drinkability profile is **consistently considered relevant** across genders and age groups, nevertheless, consumers consider **they got options to satisfy their “easy to drink” and “doesn’t make me feel bloated” needs.**

Decoding of “Ligera”

Consumers consistently describe “ligera” as a **beverage that doesn’t make you feel bloated** (“empanzado”) or overly full. One allows you to **continue drinking** throughout the occasion.

“A beverage you can enjoy and doesn’t take over you”.

Brands with most mentions associated to bloatness include Atlas, Atlas Golden, Craft beers and Panama light.

Implications in flavor

There is **no immediate association between lightness and lack of flavor**, and one doesn’t necessarily imply the other.

Proof of this is Cristal - which is considered to be **full-flavored but still feels light to drink**- and for some consumers (mainly men), even Balboa - which is bitter and with a stronger ABV, but is not known to produce fullness.

Relevance and implications of a lower calorie claim

A lower calorie claim can be associated to premiumness since it implies an additional benefit vs. regular beer. However, **versus a lightness claim, the attribute tends to be less valued and relevant.**

Additionally, a **“no calorie” claim can be associated to a “light” product** which can have a **negative implication in flavor.**

“All the ones that have the “light” term, don’t want a good flavor”.

So what is the gap or tension that remains unsolved?

Consumers **don’t perceive an unmet need** in terms of **sacrificing flavor for an easy to drink alcoholic option.**

Tensions validation: Showing Success

In Chiriquí, **premium can mean either standing above others** (yeye premium) **or earning the respect of others while remaining authentic** (successful without pretension premium).

What makes a brand “Yeye” premium?

These brands signal **status, sophistication, cosmopolitanism and access to a lifestyle perceived as elevated or aspirational**. These brands help consumers stand out, project success and align themselves with more urban or affluent social circles.

Key signals:

- Imported or international.
- Seen in media, movies, social networks.
- Modern and aspirational lifestyle

Beer brands mentioned

- Corona, Heineken, Modelo, Budweiser, Miller Draft

Consumer reward: *People see that I have good taste and access to something above the ordinary**

What makes a brand “Successful without pretension” premium?

Brands reflect **achievement, good judgement, tradition, and respectability** while remaining **authentic, approachable, and connected to local roots**.

Success is demonstrated through confidence and credibility rather than status displays.

Key signals:

- Good taste and authenticity.
- Tradition and local pride.
- Respectability & Confidence without showing off.

Brands mentioned:

- Cristal (particularly through Chiricano identity), Balboa, Panama

Consumer reward: *People see me as successful, but also authentic and grounded**

So what is the gap or tension that remains unsolved?

A beer brand that **projects a different approach to premium with a down-to-earth way of showing success**.

This implies an opportunity to signal sophistication because of quality and origin, not because of luxury: *This is how we show success in Chiriquí.*

Tensions validation: Belonging & Connection

Alcoholic beverages can **help an individual fit into a group in premium and political occasions** (looking good), but also in more relaxed, friendly environments (feeling good).

Relevant situations

Whether in a corporate setting, high-end venues or “yeye” environments, **alcoholic beverage choice can tell a story about someone’s personality and background.**

Nevertheless, the belonging and connection need is also **highly relevant in occasions associated to the unwinding together and lively connecting demand spaces**, where feeling good is the most important motivation.

Beverages and brands as social enablers

Conversation facilitators

A social enabler in a premium occasion doesn’t only provide an image, but **generates a topic of conversation**, a trait commonly showed by cocktails or whisky.

Online projection

Differentiation, novelty, colorfulness and uniqueness of an alcoholic beverage also provide a **good opportunity for posting and projecting oneself online**, a relevant factor when it comes to belonging or connecting with a specific group. In this respect, cocktails and craft beers are common choices.

The safe social choice

Some alcoholic beverage choices can **help ease up the environment and promote easier interaction**, while **still maintaining a good image**. In this arena, premium beers as well as specific national ones (including Cristal) can play role.

So what is the gap or tension that remains unsolved?

Unlike imported beers that signal status or cocktails that signal novelty, **Cristal can credibly own a space where premium is expressed through belonging, authenticity and social confidence.**

Understanding prices in the beer category:

Consumers spontaneously **segment beer prices into two groups: National and Imported**, with on trade venues typically standardizing prices within each segment.

Current prices paid

Segment	Typical Price Supermarkets	Typical Price On Trade
Cristal	\$0.58-\$0.65 per can (6-pack: \$4.00-\$5.50)	Standardized to national beer price.
National Beer	\$0.55-\$0.80 per unit	\$1.50-\$2.50
Imported Beer	\$1.00-\$1.25 per unit	\$5.00-\$8.00+
Craft Beer	----	\$5.00 - \$8.00+

- **Expensive beer starts around \$2 - \$3 per bottle or can** and becomes difficult to justify above \$5 unless it is unique craft or specialty experience.
- **Switching threshold:** around \$.650 - \$7.00 per six-pack for mainstream beer, at which point consumers begin comparing against imported beers or alternative alcoholic beverages.

Pricing dynamic on-trade

- Consumers are **more flexible with pricing during social or celebratory** occasions.
- Premium occasions shift comparison away from national beers and **toward imported beers, cocktails, spirits, or wine.**
- **If beer pricing approaches hard liquor or cocktail territory** without offering additional value, **consumers start reconsidering their choice.**

Ontrade venues keep the price differential between brands of the same origin.

Drivers for paying a premium price

A price increase **must be justified**, specially in Chiriquí where consumers want to assure what the brand or product is offering in return.

Key premiumization drivers that lead to paying a price premium

+ Relevant

Product profile

- Better ingredients – (organic, preservative-free, national and especially international recognitions).
- Craft alternative.

Production process and trajectory

- Unique artisanal process.
- Authentic local history.

Promotional Innovation

- Special, limited-time editions tied to local and national culture.

- Relevant

Barriers for paying a premium price

Eliminate or reduce an existing benefit

- Less product content in a more sophisticated package.

Communication reinforcement (only)

- Stronger communication of current benefits (something the product already has).

Brand image refreshment (only)

- Premium image without functional improvements.

Premiumization is accepted when consumers perceive they are gaining something; it fails when they feel something has been taken away.

Cristal perception

The most socially versatile beer in Chiriquí: a quality local brand that belongs everywhere.



A source of Chiriquí pride that combines local roots with broad social appeal.

Associated attributes:

Refreshing, light, approachable, high-quality, easy to drink, doesn't cause a hangover, something I can keep on drinking.

Who drinks it?

Everyone.

- Men and women
- Multiple generations
- All social levels
- Frequent and occasional drinkers.

Why?

- Light and refreshing.
- Easy to drink over long periods.
- Good quality.
- Local identity and heritage.
- Affordable.
- Everyone likes it
- Appropriate for any occasion.
- Trusted and familiar.

When?.

- Parkings.
- Family gatherings.
- Parilladas, asados.
- Watching sports / games.
- After doing sports.
- Casual outings.
- Long-lasting occasions.
- Premium occasions when consumers want something mild or want a beer.

Where?

- On trade
- Off trade
- Casual and premium environments.

How?

- Straight from the bottle or can in casual moments.
- Served in a glass in premium occasions, restaurants or social events.

Currently, the use of the glass is mainly due to functionality reasons (keeping it cold, hygiene, less bloating) though emotional benefits also play a role (better presentation, having a slightly more refined appearance – particularly among women).

Personification

Cristal brings inclusion. Corona brings status. Balboa brings personality.



- **Male or female** between **20 and 40 years** old.
- Lives in **Volcán or Tierras Altas**.
- Social, extroverted and approachable.
- **Doesn't have a specific social status.**
- Adaptable across generations, **proud of its roots and modern – but without losing authenticity.**
- Makes people feel comfortable. Discreet.



- **Male or female.**
- Young adult. Aspirational.
- **Stylish, status-conscious, Yeye.**
- Has an iPhone. and uses branded clothing like Tommy Hilfiger, Chanel or exclusive models from Adidas.
- **OR a cowboy with boots**, branded cap or hat. With a big buckle and leather wallet.



- **Male.**
- Tough. Loud.
- **With a strong personality.**
- Hard party-oriented.
- Traditional.

Territory # 1: Affordable Craft

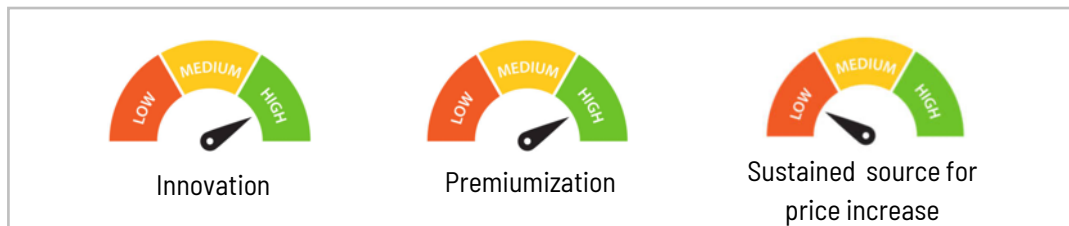
The territory builds on **Cristal's existing equities of quality, freshness and Tierras Altas**, but, by itself, consumers **do not naturally perceive Cristal as a craft brewer**.

STRENGTHS

- The idea is **innovative**.
- Provides Cristal with the opportunity to further **reinforce local association and nature positioning** through the incorporation and use of local ingredients.
- Reinforces **quality and authenticity**.
- Generates **opportunities for content generation** in social media.
- Source for **price increase**.

CHALLENGES

- The idea can find **credibility challenges** since **Cristal is seen as a commercial, mass-production brand**, which pushes it away from the craft segment.
- **Consumption frequency is low**, associated to novelty, venue and social environment.



TARGET

- **More relevant:** Younger adults, those seeking novelty, explorers of craft beers, those interested in food and beverage experiences.
- **Less relevant** for older, traditional consumers and those who primarily seek familiarity and value.

IMPLEMENTATION GUIDELINES AND RECOMMENDATIONS

- The product **should be a variant** rather than a substitution of the current product.
- **Credibility should be reinforced** through venue alliances.
- **Leverage on local flavors** (coffee, strawberry) and **avoid too much bitterness**.
- Proposed communication line: **Introducing meaningful differentiation into mainstream beer without sacrificing drinkability, familiarity and social inclusiveness**.

The territory associates to a previous Cristal craft innovation launched in alliance with Boquete Brewing Co which generated curiosity and trial intent - though not necessarily trial due to availability reasons .

Territory # 2: Natural Premium

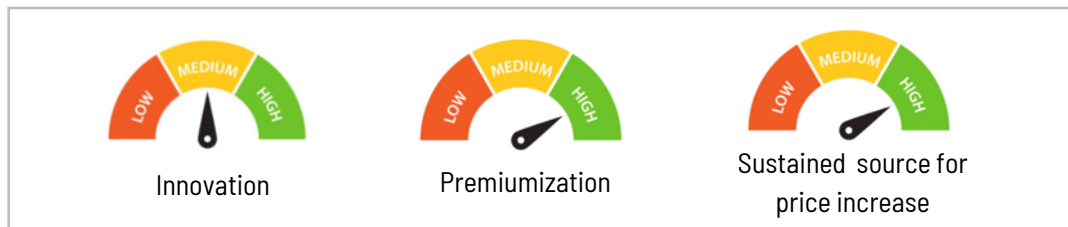
The territory **aligns to Cristal's current positioning** - which makes it credible - and proposes attributes that can **imply category superiority + sophistication based on quality and origin**. *"This is how we show success in Chiriquí"*

STRENGTHS

- Builds on **existing perceptions** of Cristal and **reinforces current brand associations** (Nature, freshness, purity, lightness, environment consciousness).
- **Superiority vs. other local beers** generates the functional and emotional rationale for charging a premium price.
- **Premium communication** elevates the brand.

CHALLENGES

- Focus on ingredients may lead to **expectations regarding new additions or higher quality sourcing** (organic, fewer / no preservatives, cleaner production process, better for me) not just the natural communication per se.
- **Upgrade messaging must be clear and focused on premiunization**: Several consumers perceive it as a message Cristal already communicates.



TARGET

- **More relevant:** Women, health-conscious consumers, premium mainstream drinkers. Consumers already attracted to the brand's natural image.
- **Less relevant:** Those unaware or careless about health or aesthetic benefits when drinking beer.

IMPLEMENTATION GUIDELINES AND RECOMMENDATIONS

- **Substitution** of the current product but flavor must be unchanged.
- **Evidence is necessary:** RTB must be reinforced through certifications.
- **"Premium"** must be included in the labeling
- Opportunity to leverage on a **down-to-earth premium** and way of showing success, signaling **sophistication** due to **quality and origin**.
- The **"stigmatization of Chiricanos from other provinces"** tension can also be addressed in this territory, since it involves local pride.
- **World-class / international standards claims** can also be evaluated to increase premiumness.
- Proposed communication line: **"The best ingredients from Chiriquí for all Panamanians"** *"This is how we show success in Chiriquí"*.

Territory # 3: Special Edition

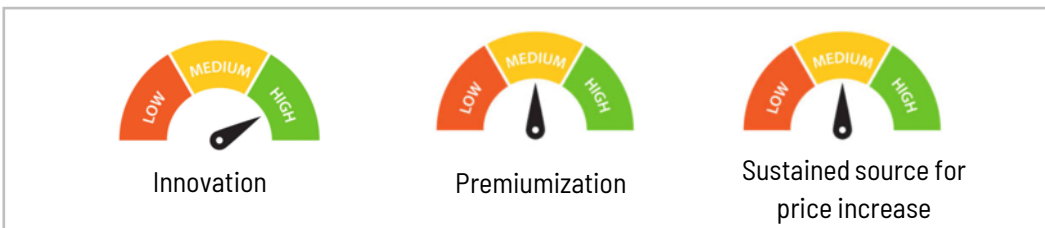
Limited-edition releases generate **excitement, collectability and trial**, but are perceived as temporary promotional initiatives rather than a sustainable premium proposition.

STRENGTHS

- Creates **scarcity, urgency and FOMO**, motivating consumers to purchase before the edition disappears.
- Strong **collectability appeal**.
- **Fits naturally with Cristal's existing equity and history**, and consumers believe Cristal can credibly launch special editions tied to cultural moments and fairs.
- **Supports premium pricing through exclusivity**.
- **Strengthens emotional connection** to local culture.

CHALLENGES

- Perceived as **promotional innovation** rather than product innovation.
- **Risk of excessive regionalism**: Editions focused only on Chiriquí could limit appeal in other provinces.



TARGET

- **Most relevant**: Collectors and enthusiasts and younger consumers attracted to novelty. Consumers from the other provinces.
- **Less relevant**: Consumers primarily seeking beer.

IMPLEMENTATION GUIDELINES AND RECOMMENDATIONS

- Limited-time offerings.
- Broader Panamanian is preferred over purely Chiricano stories.
 - **Country reunification / empathy generation**: "From Chiriquí to Veraguas"
 - **Involve other provinces**.
- Including country's icons (Landscapes, Quetzal, Coffee flower).

This territory may also help address the tension surrounding how Chiricanos are perceived by other provinces, by reframing local pride as a source of quality, authenticity, and contribution rather than arrogance.

Co-Creation: Additional avenues to reinforce premiumness

Avenue #1

Image refreshment

- **Increase presence of color gold** in the packaging to reinforce premiumness but **protect current colors** (red, white).
- **Minimalist design** to project modernism.
- Inclusion of **local icons**.

Avenue #2

Flavor in & outs

- Limited-time options based on **local flavors** (like coffee) but also **other alcoholic beverages** (rum).
- Strategic **local alliances** (Café Geisha).
- Pursue a **sweet profile to attract women**.

Avenue #3

Bottle reinvention

- **Stylish glass bottle.**
- Larger, thinner.
- Clear
- Premium bottle cap.
- **Improve size impression** to be similar to Panama and Balboa.

Avenue #4

Higher ABV

- **Line extension.**
- **Same content per bottle / can as current** Cristal.
- **Skinny, taller can.**
- Men as main target.

Main findings

- **Consumers mentally organize the category in two distinct worlds: the national beers and imported ones.** Participants consistently used origin as the primary pricing consideration. National beers compete against each other while imported beers occupy a premium reference frame. This implies an important challenge for Cristal: Increasing pricing is not only about increasing willingness to pay, but about changing the frame of reference itself – through premiumization.
- **Chiricanos are expecting a price increase to be justified and accompanied by clear improvements or signs of superior value.** Premiumization implies going beyond a brand image refreshment or a communication of current benefits, with consumers asking, “What else is Cristal giving me for charging a higher price?”
- **Premiumization fails when consumers perceive value extraction rather than value creation.** One of the clearest barriers identified was reducing product quantity or taking away existing benefits while charging more. Consumers react negatively when premiumization feels like a loss disguised as an upgrade.
- **Premium in Chiriquí is not about looking more expensive, but about providing a credible reason to be worth more.** Consumers are open to paying more for Cristal, but premiumization must be earned.

Main findings

- **Consumers want to protect Cristal's taste.** Any change or modification in flavor (craft beer, Cristal flavor innovation) should be implemented in a separate variety.
- **Colors of Cristal (red, white, gold) should also be maintained.** Any packaging and image modification should be generated considering these colors.
- **Better ingredients are one of the strongest justifications for a higher price.** Consumers consistently linked premiumization to superior ingredients, naturalness, authenticity, and product quality. International recognition and ingredients with a compelling story further strengthen premium credentials.
- **A craft variety could increase premium perception – and willingness to pay a premium, craft price – ,** but consumption frequency tends to be sporadic and takes place mostly in specific venues (like Boquete Brewing Co. and Rana Dorada) and consumers return to their usual commercial brand in their usual consumption.
- **Special editions generate excitement and consumer engagement, but like a craft variety, the approach falls into the innovation territory,** implying a limited time alternative rather than a permanent premiumization initiative.

Recommended Premiumization Territories

First option – Natural Premium

This territory offers a good balance between **credibility, premiumization potential and long-term sustainability**. Builds on **attributes already associated with the brand** (naturalness, freshness, purity, lightness and connection to Chiriquí) so it doesn't require consumers to reinterpret what Cristal stands for.

Additionally, focus on ingredients, sourcing, production process and certifications **represent quality credentials that provide a clear and credible rationale for a higher price**.

Second option – Affordable Craft

Affordable Craft is true innovation for Cristal, so it **responds to consumers' desire for novelty**. Additionally, it **aligns with Cristal's local ingredients and Chiriquí associations** while building on **authenticity**.

The concept should be addressed through partnerships (like with Boquete Brewing Co. to reinforce credibility), **leverage on local flavors** (coffee, strawberry) and **avoid delivering a product that is too bitter** (to align with brand's taste profile).

Recommended Premiumization Territories

Third option – Special Edition

This territory represents a **good innovation and engagement path** but is **weaker when considered for a permanent premium strategy** due to its limited-time and tactical nature.

For implementation, the **local festivities theme is well-received**, though *Chiricanos* also suggest using **themes that can involve the entire country or aimed at uniting it** (which addresses an additional tension revealed: *Chiricanos* are not comfortable with the fact that they are not well-seen by the rest of the country due to misunderstandings and/or misconceptions).

The Ultra Ligera Premium territory, though did find some acceptance among a group of consumers, **got several negative spontaneous reactions and raised concern** that pushing Cristal's lightness further could make the product feel watered down or less satisfying. This implies a potential alienation of existing users. Additionally, the concept addresses a need that Cristal already resolves (a beer that is 'ligera' but also full of flavor).

PRE TASK

¡Ahora aplicaremos lo que aprendimos!

Tarea: Construyamos 1 insight para el territorio #____, usando nuestra receta!

Verdad del consumidor

Motivación

Tensión



Importante: Llémoslo desarrollado para nuestro Workshop el 14 de julio.



**RECORDEMOS LO
QUE APRENDIMOS
ACERCA DE LOS
INSIGHTS...**



HNK POV: UNA PROPUESTA SÓLIDA NO SE CONSTRUYE SOBRE LO QUE LA MARCA QUIERE DECIR – SE CONSTRUYE SOBRE LA VERDAD DEL CONSUMIDOR

Un insight es un entendimiento fresco* de por qué nuestros consumidores piensan, sienten y actúan como lo hacen, lo cual conduce a oportunidades accionables para la marca y la categoría.



La receta para construir un insight es:

Verdad del Consumidor

Un descubrimiento sobre lo que la gente hace, desea, necesita, piensa o cree

- Deseo...
- Necesito...
- Quiero...
- Hago....
- Creo...
- Soy....

Motivación

La motivación subyacente: razones, miedos, necesidades, deseos o comportamientos que impulsan esa verdad

- ¿Por qué necesita eso?
- Porque...
 - De forma que...

Tensión

Una contradicción (aparente o no) que se interpone en el camino de alcanzar ese deseo o satisfacer la necesidad.

- Pero...
- Aún así...
- Sin embargo...

Ejemplos de Insight usando nuestra receta...

Verdad del consumidor

Un descubrimiento sobre lo que la gente hace, desea, necesita, piensa o cree

- Deseo...
- Necesito...
- Quiero...
- Hago....
- Creo...
- Soy....

Deseo que el tinte de mi cabello actúe más rápidamente

Deseo tomar café gourmet en casa todas las mañanas

Soy una autoridad en productos para niños.

Motivación

La motivación subyacente: razones, miedos, necesidades, deseos o comportamientos que impulsan esa verdad

- ¿Por qué necesita eso?*
- Porque...
 - De forma que...

Para que pueda dedicarme a hacer cosas más importantes

De forma que pueda consentirme a mí mismo y disfrutar un tiempo "para mí" cada mañana.

Porque realmente investigo muy bien acerca de los temas que tienen que ver con mi hijo, para asegurarme de darle solo lo mejor.

Tensión

Una contradicción (aparente o no) que se interpone en el camino de alcanzar ese deseo o satisfacer la necesidad

- Pero...
- Aún así...
- Sin embargo...

Pero me preocupa que eso implique tener que usar "químicos muy fuertes"

Pero el café gourmet es muy caro y entonces debo dejarlo solo para ocasiones especiales y fines de semana.

Sin embargo, a menudo tengo que dedicar más tiempo del que quisiera a separar información falsa o inexacta de la verdadera.

GOLDEN RULES para los insights

Primero tengamos en mente que: Lograr el insight correcto es la parte que más esfuerzo requiere en el desarrollo de conceptos y los conceptos que funcionan se basan en un conocimiento auténtico del consumidor.

Usar palabras exactas del consumidor / lenguaje cotidiano – no asumir como deberían sentirse

Enfocarse a la vez en una sola verdad, problema o creencia del consumidor

Evitar ser negativo para no dar un tono problemático que evite la lectura del consumidor

No siempre se trata de un problema o un punto de dolor y se basa en lo observado

Ser realista: Validar que el insight pueda resolverse más adelante con el beneficio

Generan conexión y confirmación espontánea, fluyendo ejemplos personales al presentarlo a los consumidores (explica POR QUÉ el consumidor NECESITA su producto)

No recurrir a expresiones que introducen el beneficio, como “¿no sería genial si...?” u “ojalá tuviera...”.

Esta relacionado con la categoría pero no directamente con el producto (no es acerca de este)

Checklist de un insight



THANK YOU

