

FOODSERVICE ALCOHOL TRENDS – US – 2023

While fair pricing takes priority when it comes to ordering alcoholic beverages AFH, consumers still value the social and celebratory aspects FS alcohol provides.



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Foodservice Alcohol Trends - US - 2023

This report looks at the following areas:

- Alcohol consumption frequency
- Consumption occasions by alcohol type
- Reasons for ordering alcoholic beverages from bars/restaurants
- Interest in types of alcoholic beverages available at bars/restaurants
- On-premise alcohol-related attitudes

Overview

The experience of drinking alcohol at a bar or restaurant encompasses a multitude of reasons and occasions. Over half of the consumers partake in alcohol occasions away-from home as a way to treat themselves, and look to alcoholic beverages as a way to help them socialize and celebrate. The growth of the category remains stable YOY, but could be challenged by the growing interest in sober curiosity.

Younger consumers, particularly millennials, are frequent alcohol consumers and show interest in alcohol-related experiences that complement their lifestyles, such as picking drinks based on their mood or opting for unique drinks in terms of flavor and preparation. As these consumers seek holistic enjoyment, operators are well positioned to curate menus to their liking.

Variety in offerings through formats, brands, and prices will give consumers the autonomy to enjoy personalized dining experiences. While many consumers tend to stick to their usual



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orders for the sake of consistency, others exclusively seek out drinks they haven't tried before. Tasting flights and happy hour deals will provide consumers seeking value through pricing to trial new drinks with low commitment. Conversely, options that offer food and drink pairings and premium options will allow consumers to upscale their dining out experience.

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Report Content



EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- Market predictions
- Opportunities

CONSUMER INSIGHTS

Consumer fast facts

Alcohol consumption frequency

- Alcohol consumption is stable, but growth could be hindered
 - Graph 1: alcohol consumption frequency, 2021-23
- Millennials are the top alcohol consumers
 - Graph 2: alcohol consumption frequency, by generation, 2023
- Women pair alcoholic beverages with special events
 - Graph 3: alcohol consumption frequency, by gender, 2023

Alcohol consumption by occasion

- There's room to grow at breakfast and brunch
 - Graph 4: alcohol consumption by occasion, 2023
- Make way for wine during the earlier hours of the day
 - Graph 5: alcohol consumption during brunch, by age, 2023
- A little guidance goes a long way

Alcohol ordering behaviors

- Ordering habits remain consistent for the most part
- Millennials pick and choose based on their mood
 - Graph 6: alcohol ordering behavior, by generation, 2023
- A twist on classics can pave the way to new trial
 - Graph 7: alcohol ordering behavior, by generation, 2023
- Younger consumers are willing to try something new
 - Graph 8: alcohol ordering behavior, by gender and age, 2023

Reasons for consuming alcoholic beverages AFH

- Alcohol is there for all occasions

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- Graph 9: reasons for consuming alcoholic beverages AFH, 2023
- Millennial's seek recommendations to create personalized experiences
 - Graph 10: reasons for consuming alcoholic beverages AFH, by generation, 2023
- Women are more likely to save drinking occasions for special events
 - Graph 11: reasons for consuming alcoholic beverages AFH, 2023

Interest in alcoholic beverages from AFH locations

- Take off on a flight of flavors
 - Graph 12: interest in alcoholic beverages from AFH locations, 2023
- Millennials lifestyle interests influence their drinking habits
 - Graph 13: interest in alcoholic beverages from AFH locations, by generation, 2023
- Tasting flights provide women with variety and low commitment
 - Graph 14: interest in alcoholic beverages from AFH locations, 2023

Important factors when ordering alcoholic beverages AFH

- Fair pricing takes priority when it comes to ordering
 - Graph 15: important factors when ordering alcoholic beverages AFH, 2023
- With age comes stronger interest in brands and quality
 - Graph 16: important factors when ordering alcoholic beverages AFH, by generation, 2023
- Women are visual, men are brand enthusiasts
 - Graph 17: important factors when ordering alcoholic beverages AFH, by gender, 2023

On-premise alcohol attitudes

- The proof is in the print
 - Graph 18: on-premise alcohol attitudes, 2023
- Millennials want a little bit of everything
 - Graph 19: on-premise alcohol attitudes, by generation, 2023
- Happy hours motivate drink trial for women
 - Graph 20: on-premise alcohol attitudes, by gender, 2023

COMPETITIVE STRATEGIES

Launch activity and menu innovation

- Cocktails go sweet and spicy in 2023
- Spicy cocktails on menus
- Operators go all out to offer the seasons best
- Flights of all types
- Functional ingredients take charge on cocktail menus

Opportunities

- Put growing cocktails on brunch menus
- Provide experiences that go beyond at-home preparations
 - Graph 21: reasons for consuming alcoholic beverages AFH, 2023
- Elevated cocktails help create new, justifiable experiences
- Preparation styles growing on US menus
- ABV makes it on to cocktail menus
- Make way for savory cocktails menus

THE MARKET

Market context

Market drivers

- Almost half of US consumers spend their extra money on dining out
 - Graph 22: American lifestyles - spending, 2023
- Help consumers make informed choices
 - Graph 23: alcohol attitudes trended, 2022-23

Market size and forecast

- Retail sales and forecast of foodservice alcohol
- AFH alcohol should continue to evolve to capture consumers changing needs

APPENDIX

- Market definition
- Consumer research methodology
- Generations
- Abbreviations and terms
- Forecast
- Forecast fan chart
- The market

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