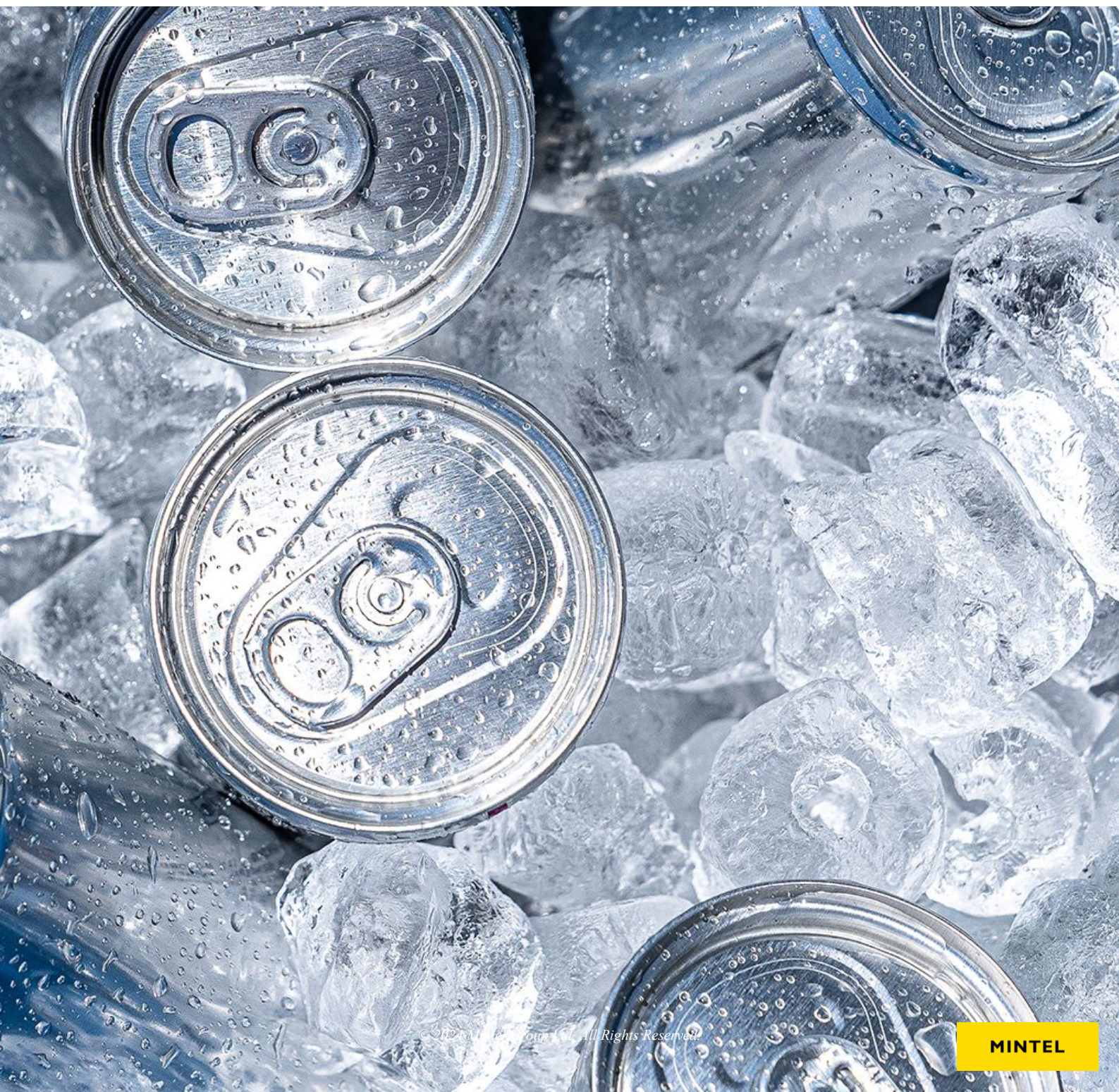


# RTD ALCOHOLIC BEVERAGES – US – 2023

RTDs have taken the alcoholic beverage by storm in spite of limited consumer understanding of product nuances and perceptions of oversaturation suggesting that a little more clarity can take the category and its brands even further.



Kamari Davis, Research  
Analyst, Food & Drink



# RTD Alcoholic Beverages - US - 2023

## This report looks at the following areas:

- Types of RTDs purchased
- Frequency of RTD consumption
- Attributes associated with RTDs by type
- RTD purchase motivators
- RTD attitudes and behaviors
- Market size and segment performance
- RTD brand performance
- Competitive strategies and opportunities
- Market drivers

## Overview

While RTDs are on the radar of many brands, and they have a **strong base**, they are still an occasional alcohol option: just 17% of drinkers list

RTDs as their primary alcoholic beverage of choice. Brands have some work to do to sustain the momentum for the longer term and to take a step closer to coveted primary drink status among more consumers. 44% of alcoholic beverage drinkers think there are too many RTDs, and 34% think they simply "aren't for me".

While casual convenience are hallmarks of RTDs, flavor exploration is the clear driver that should be continually considered, albeit perhaps in new ways. Despite the allure of unique flavors and variety packs, the category, and perhaps its' brands, struggle with a clear identity. While trendy is strong, lukewarm premium or even "healthy" associations suggest that RTDs may be destined to be perpetually an option, not the drink of choice across occasions,



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without a shift. Elevating perceptions is in order: about half of alcoholic beverage drinkers believe [what you drink is a personal reflection](#).

While variety is a proponent of RTDs in product choice, it may also be the deterrent to greater exploration. Nearly half of RTD drinkers don't understand the nuances in RTD types, challenging brands to double down on value propositions and identity. Still, the popularity of variety among category fans is an asset to be leveraged in new ways that can expand the base, perceptions and occasions. For example: interest in cocktail recipes featuring RTDs is strong, especially among core drinkers, begging the question if wine and beer can be ingredients in cocktails, why can't RTDs?

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# Report Content

## EXECUTIVE SUMMARY

- What you need to know
- Consumer trends: key takeaways
- The five-year outlook of RTD alcoholic beverages
- Opportunities

## CONSUMER INSIGHTS

### Consumer fast facts

#### Types of RTDs purchased

- Seltzers dominate fragmented RTD purchase
  - Graph 1: RTD types purchased, 2023
- Millennials keeping both traditional FMBs and RTD innovation thriving
  - Graph 2: RTD types purchased, by generation, 2023
- Raise the bar to reach more women
  - Graph 3: RTD types purchased, by gender, 2023
- Don't sleep on parents
  - Graph 4: RTD types purchased, by parental status, 2023
- Double down on inclusive messaging
  - Graph 5: RTD types purchased, by race/Hispanic origin, 2023

#### RTD perceptions by type

- RTDs in identity crisis?
  - Graph 6: perceptions of RTDs by type, 2023
- RTDs have a perception problem
  - Graph 7: perceptions of RTDs, 2023
- Get more leverage out of Gen Zs and Millennials' aspirational wellbeing and premium notions
  - Graph 8: RTD association, by generation, 2023
- RTDs get the party started, but may miss out on everyday occasions
  - Graph 9: RTD association, by gender and age, 2023
- Trendiness may not be all it's cracked up to be...
  - Graph 10: RTD perceptions by beverage type, by generation

#### Ranked RTD purchase motivators

- Flavors, value and brand trust

# RTD Alcoholic Beverages – US – 2023

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- Graph 11: RTD purchase motivators, 2023

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- RTDs still have room to pick up occasions
  - Graph 12: RTD consumption frequency, 2023

## RTD attitudes and behaviors

- Use convenience and exploration to open new doors
  - Graph 13: attitudes towards RTD alcoholic beverages, 2023
- Multicultural drinkers are ripe for more from RTD brands
  - Graph 14: attitudes towards RTDs, by race/hispanic origin, 2023
- Balance interest and overwhelm with strong brand identity
  - Graph 15: RTD attitudes towards RTD beverages, 2023
- Multicultural consumers also "get" RTDs: looking for versatility and volume
- Kill two birds with one BFY stone
  - Graph 16: behavior towards RTDs, by age, 2023

## COMPETITIVE STRATEGIES

### Launch activity and innovation

- Flavor variety is the spice of life and a brand refresher
- Mintel Flavourscape AI explores the future of flavor and flavor combinations using data science
- Flavourscape AI spotlight: blackberry level-up
- NA brand space invaders
- Alcohol alternatives everywhere are still buzzing...
- ...and don't have to be void of buzz
- Blurring the lines with flavor hacks

### Marketing and advertising

- Powerhouse partnerships
- Brands balance between being active to sports marketing

### Opportunities

- Tackle confusion with education to make RTDs more than an "also drink"
  - Graph 17: RTD purchase factors, 2023
- Invite RTDs into the cocktail ingredient space
  - Graph 18: RTD attitudes towards alcoholic beverages, 2023
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  - Graph 19: RTD attitudes towards alcoholic beverages, by generation, 2023
- Functionality and customization can raise the bar on health and premium perceptions

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#### Market drivers

- Health is still the elephant in the room...
  - Graph 20: attitudes toward alcoholic beverages, 2023
- RTD premium makeover is needed
  - Graph 21: RTD beverage type purchased, 2023 – NET – any purchase, 2023
- Dry January and sober October are here to stay
  - Graph 22: sober curious awareness and adherence, 2022-23

#### Market size and forecast by RTD segment

- Disproportionate growth demonstrates innovation continues to stir trial beyond traditional FMBs
- The competition is getting spirited
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- Hard seltzers come on strong
  - Graph 24: total volume sales and forecast of ready-to-drink alcoholic beverages, by segment, 2018-25
- Hard seltzers come on strong, really strong
- Cocktail surge in the RTD space indicates room for spirits that are sophisticated and not stuffy
  - Graph 25: total volume sales and forecast of spirits-based prepared cocktails, 2018-25
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  - Graph 26: total volume sales and forecast of coolers, 2021-25

#### Market share/brand share

- Twisted Tea led top FMBs in growth
- Positive growth leaves even more room for growth and development

## APPENDIX

- Total US volume sales and forecast of flavored malt beverages/hard seltzer, by segment, at current prices, 2018-25
- Market definition
- Consumer research methodology
- Generations
- Abbreviations and terms

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