

# WHITE SPIRITS – US – 2023

White spirits can continue to embrace their versatility as both sippable and mixable, reminding consumers that the choice for refreshing, fun and relaxing is easy.



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US Food and Drink



# White Spirits - US - 2023

## This report looks at the following areas:

- White spirits purchase by type
- Liqueurs
- Regions associated with premium spirits
- Change in spirit consumption (and reasons why)
- Purchase locations
- Sources of trial inspiration
- Attitudes about alcohol
- Brand loyalty
- Interest in spirit-based RTD cocktails



White spirits can continue to embrace their versatility as both sippable and mixable, reminding consumers that the choice for refreshing, fun and relaxing is easy.

## Overview

72% of white spirit drinkers have purchased vodka in the last six months, as it continues to lead in the sub-category. However, growth is once again dominated by tequila, with both premium and mid-tier brands finding success through taste, versatility and strong heritage. This success has resulted in growing premium associations with Mexican exports, particularly from Gen Z and Millennial consumers.

White spirits consumers already consider them for both fun and relaxation but associations can be strengthened by reminding consumers of their versatility to meet a variety of moods. While many consumers are brand loyal, the majority can be swayed, leaving the category open to competitive innovation and a race to engage with more fickle consumers, who are typically younger. Driving white spirit consumption growth and engaged cocktail hobbyists, Gen Z consumers are both open to guidance and motivated by discovery – a winning combination for brands to help them explore, learn and grow in the category.

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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

#### Profiles of the white spirits consumer

- Mixable and sippable white spirits land top "also drink" spot
  - Graph 1: alcoholic beverages consumed most often, 2023
- White spirits can be a gateway to premium exploration for Gen Z
  - Graph 2: white spirit consumption – NET – any drink, 2023
- Meet moods across the leisure spectrum to increase occasions
  - Graph 3: attitudes about alcohol, by type of alcohol consumer, 2023

#### White spirit purchases, by type

- Expanding white spirit repertoires can be a double-edged sword
  - Graph 4: white spirit purchases, 2022-23
- Capitalize on younger consumers' white spirit engagement
  - Graph 5: white spirit purchases, by age, 2023
- The battle of the sexes is won with taste
  - Graph 6: white spirit purchases, by gender, 2023
- Flavor as the path to the top shelf
  - Graph 7: white spirit purchases, by HHI, 2023

#### Change in spirit consumption

- Spirit consumers stick with it
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- Gen Z drives growth in spirit consumption
  - Graph 9: change in spirit consumption since last year, by generation, 2023

#### Reasons for change in spirits consumption

- Self-care inspires spirit consumption...

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- Graph 10: reasons for drinking more spirits, 2023
- Self-care inspires spirit consumption...
- ...while wellness goals cap consumption
- Graph 11: reasons for drinking less spirits, 2023

## Countries associated with premium spirits

- Mexico wins with premium associations
- Graph 12: Countries associated with premium spirits, 2020-23
- Premium has room to grow across tiers
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- Graph 14: countries associated with premium spirits, by generation, 2023

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- "Everyday" retail and online channels struggle to keep up with liquor stores
- Graph 15: spirits purchase location, 2023
- Reward loyalty to connect across income levels
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- Graph 17: spirits purchase location, by generation, 2023

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- Online needs to get personal
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- Added online convenience can strengthen female consumers' connection with white spirits
- Graph 19: reasons for purchasing spirits online, by gender, 2023

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- Loyalties prevail: don't rest on them
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- Value drives loyalty for vodka
- Graph 21: vodka brand loyalty, by HHI, 2023
- Women are shopping the tequila aisle...

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- What makes an RTD cocktail "real" has gendered divisions
- Graph 23: interest in spirit-based RTD cocktails, by gender, 2023
- Younger consumers move beyond brand in RTD cocktails

- Graph 24: interest in spirits-based RTD cocktails, by generation, 2023

## **Spirit versus canned/bottled cocktails associations**

- RTDs and spirits can work together to capture missed occasions
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- Gen Zs aren't all about RTDs
  - Graph 26: spirits associations, by generation, 2023

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  - Graph 28: spirit entertaining behaviors, by generation, 2023

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- While media may be the fastest route, personal connections have the most direct and immediate impact
  - Graph 29: spirit trial inspiration, 2023
- While media may be the fastest route, personal connections have the most direct and immediate impact
- Gen Z and spirit trial inspiration

## **Spirits attitudes**

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  - Graph 30: spirits attitudes, 2023
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  - Graph 31: spirits attitudes, by gender, 2023
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## **COMPETITIVE STRATEGIES**

### **Launch activity and innovation**

- Flavourscape AI
- Vodka goes local
- White Claw moves in all directions
- Tequila goes rosy

### **Marketing and advertising**

- Gin embraces aesthetics
- Trust the process

### **Opportunities**

- Keep international flavors and ingredient trends in mind

- Gen Z leads in liqueur purchasing by a long shot
  - Graph 32: liqueur purchases, 2023

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### Market context

#### Market drivers

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  - Graph 33: change in spirit consumption since last year, by HHI, 2023
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  - Graph 34: sober curious awareness and adherence, 2022-23

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- Retail sales and forecast of spirits

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- Tequila cannot be tamed
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- Retail sales of white spirits, by segment

#### Market share/brand share

- Domestic vodka brands continue to make themselves at home
- Premium is the name of the game for tequila
- Gin brands refresh a traditional segment
- Rum struggles to find its identity

## APPENDIX

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

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