

Hard Seltzers & RTDs





Summary Hard seltzers & RTDs



Consumption

A similar proportion of consumers drink hard seltzers and RTDs, with 15% consuming hard seltzers and 17% ordering RTDs.

- Hard seltzer and RTD drinkers tend to be younger and more active in the On Premise than the average consumer.
- Drink and food-led occasions are common for both hard seltzer and RTD consumption, although around a third solely drink the categories during drink-led occasions.
- White Claw dominates hard seltzer consumption in the On Premise, while Twisted Tea and Smirnoff are the most consumed RTDs.



Seve/style

Over 4 in 5 hard seltzer drinkers have consumed the category in a can/bottle, however there is some opportunity to engage consumers by offering hard seltzers on tap/draft.

- Hard seltzers are preferred to be served on their own, although 1 in 5 are likely to use it as a mixer in cocktails.
- Looking at types of RTDs, a variety are consumed in the On Premise. Pre-mixed cocktails are the most popular RTD, with over half consuming these.
- Exploring the favored flavors of hard seltzers, berry and lemonade take the lead, however there is a diverse selection of flavors consumers are wanting to drink.



Choice factors

Cost plays a big role in decision making when choosing to consume hard seltzers and RTDs in the On Premise.

- For 4 in 5 hard seltzer consumers price is a key consideration when deciding to drink the category at venues. Good value for money is the top reason for choosing to drink RTDs.
- The quality of the product and range of flavors is important to both hard seltzer and RTD drinkers when considering brand choice.

Hard seltzers

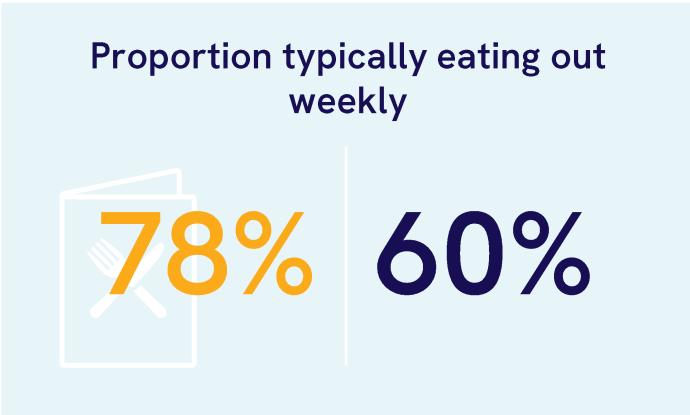
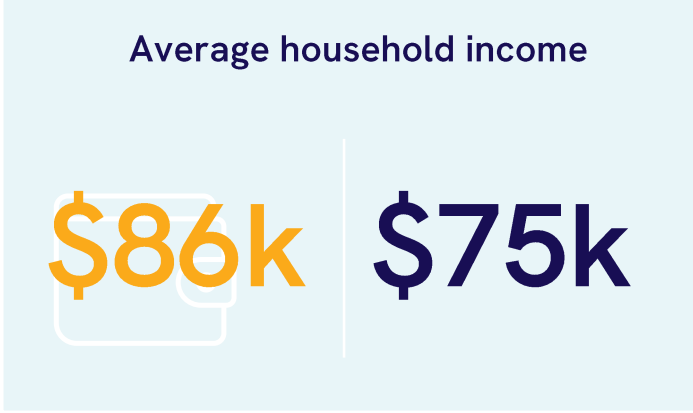
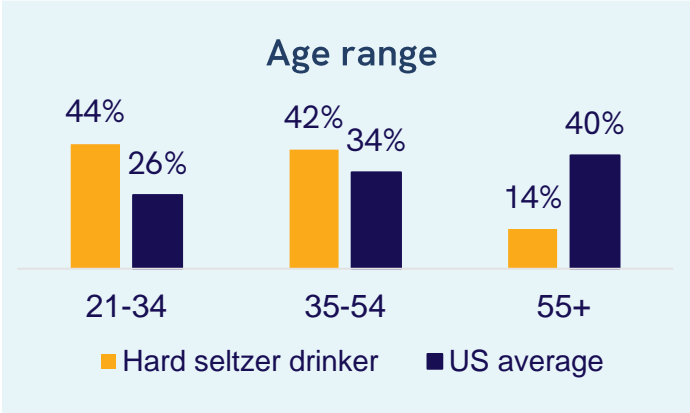


15%

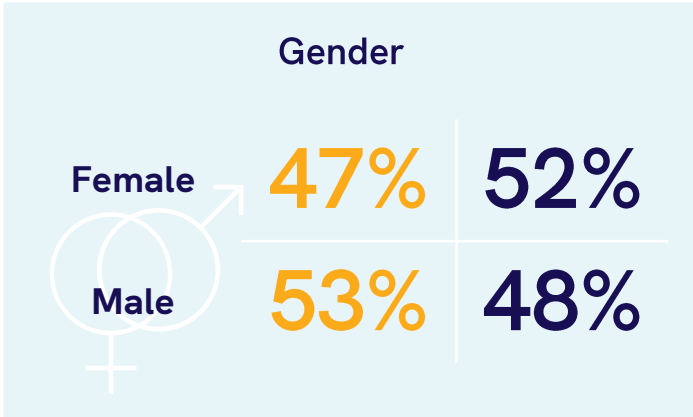
of On Premise consumers
drink hard seltzers
out-of-home



Hard seltzer drinkers are much younger than the average consumer and frequent the On Premise more often



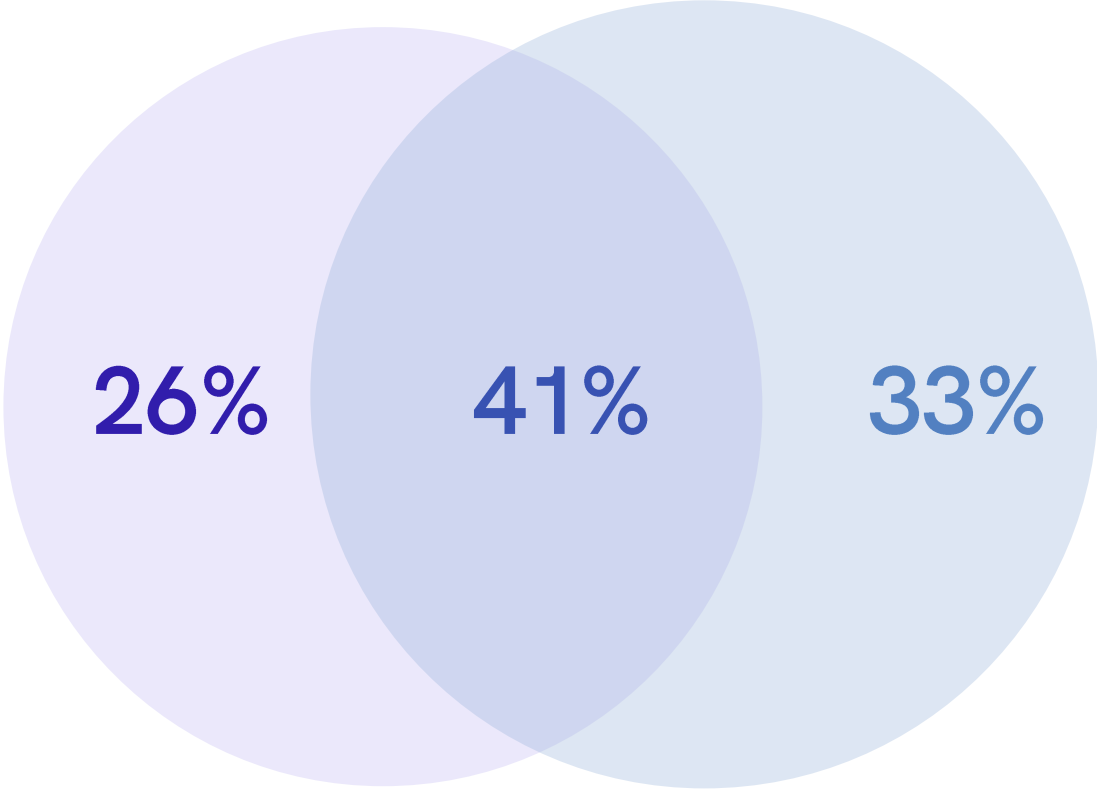
Hard seltzer drinker vs Average US consumer



Hard seltzer consumption is prevalent in both food and drink-led occasions

Occasions consumed hard seltzers

Food-led occasions



Drink-led occasions



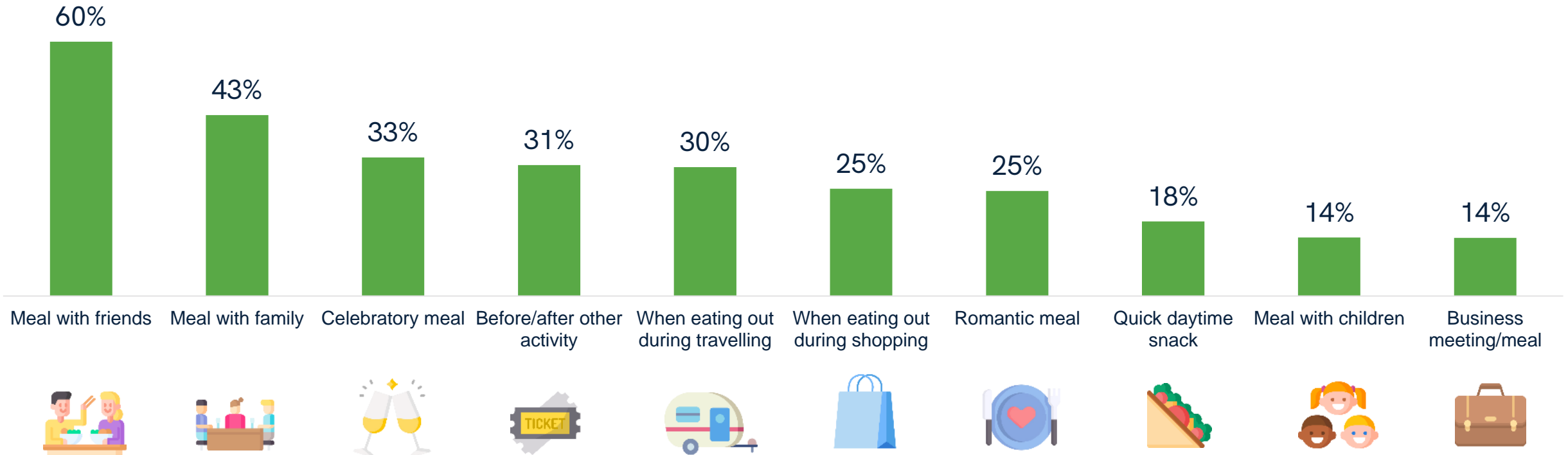
Q: On which occasions would you generally drink hard seltzers?

Source: CGA by NIQ OPUS US (Spring 2024) - Sample Size: 2108

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3 in 5 that consume hard seltzers for food-led occasions consume the category during a meal with friends, this is followed by a meal with family

% of consumers having hard seltzers during food-led occasions



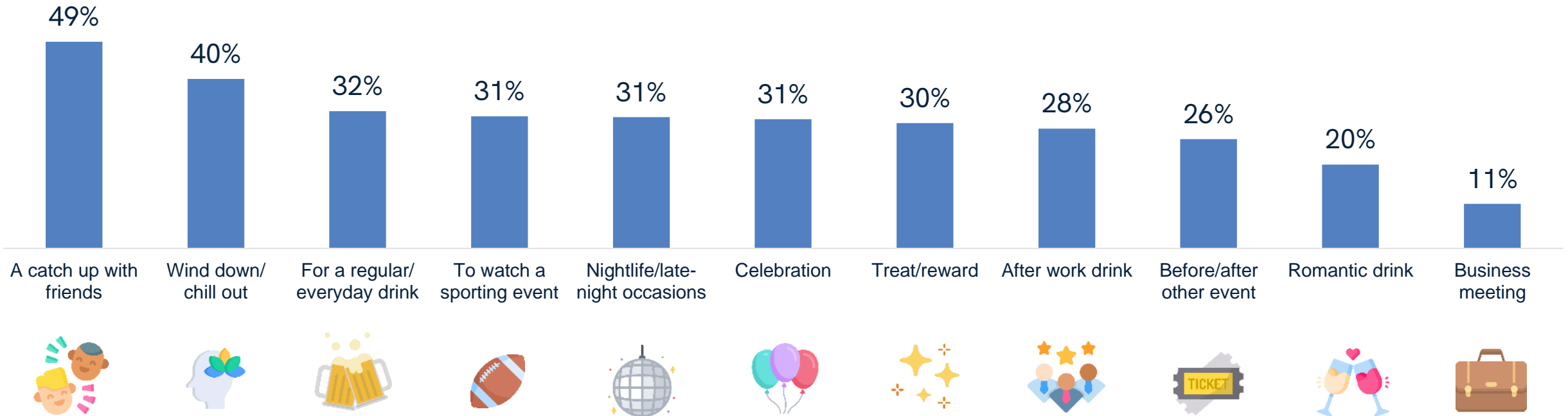
Q: On which food-led occasions (where the main reason for your visit was to go for food) do you typically drink hard seltzers?

Source: CGA by NIQ OPUS US (Spring 2024) - Sample Size: 1409

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Low-tempo drinking occasions are favored for hard seltzer consumption, with a catch up with friends and wind down/chill out being most popular

% of consumers having hard seltzers during drink-led occasions



Q: On which drink-led occasions (where the main reason for your visit was to go for a drink) do you typically drink hard seltzers?

Source: CGA by NIQ OPUS US (Spring 2024) - Sample Size: 1556

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Price and the availability of favorite flavors are the leading factors in deciding to drink hard seltzers in the On Premise

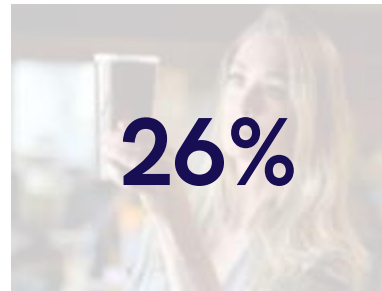
Influences to drink hard seltzers



Price



Availability of my favorite flavors



The quality of brands available



Special offers/discounts/happy hour



Alcohol Content (% ABV)



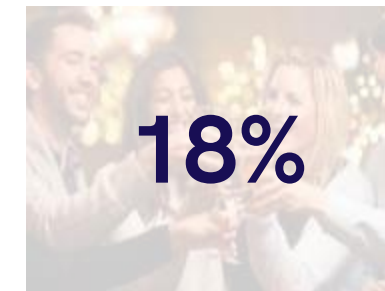
The availability of my style/brand



The time of day/day of the week



The type of venue



Influence of friends



Bar staff recommendations



Q: Which of the following affects your decision to drink hard seltzers when at eating or drinking establishments out-of-home? Please select all that apply

Source: CGA by NIQ OPUS US (Spring 2024) - Sample Size: 2110

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The majority consume hard seltzers in packaged serves, although 1 in 4 are engaged with the category served on tap/draft

Format of hard seltzer serve

% drinking hard seltzer serve

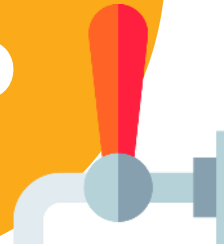
Packaged
(in a bottle/can)

84%



On
tap/draft

26%



On its own is the most popular serve for hard seltzers, with 3 in 5 having it completely on its own and a third having the category with ice

Types of hard seltzer serve

On its own On its own with ice As a mixer with a cocktail As a mixer with a spirit Served with a shot



58%

33%

20%

17%

17%

% drinking hard seltzer serve



Q: Which of the following ways do you typically drink hard seltzers when in a bar, restaurant or similar outlet? Please select all that apply

Source: CGA by NIQ OPUS US (Spring 2024) - Sample Size: 2110

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The flavor range and quality are most important to category drinkers when deciding the brand of hard seltzers

Most important factors to consider when choosing a hard seltzer brand

Range of flavors available	56%
The quality of the product	51%
The alcoholic base of the hard seltzer (e.g. malt or spirits base)	35%
The reputation of the brand	33%
How many calories it contains (a light version)	25%
That it has no artificial ingredients	20%
The can design	19%

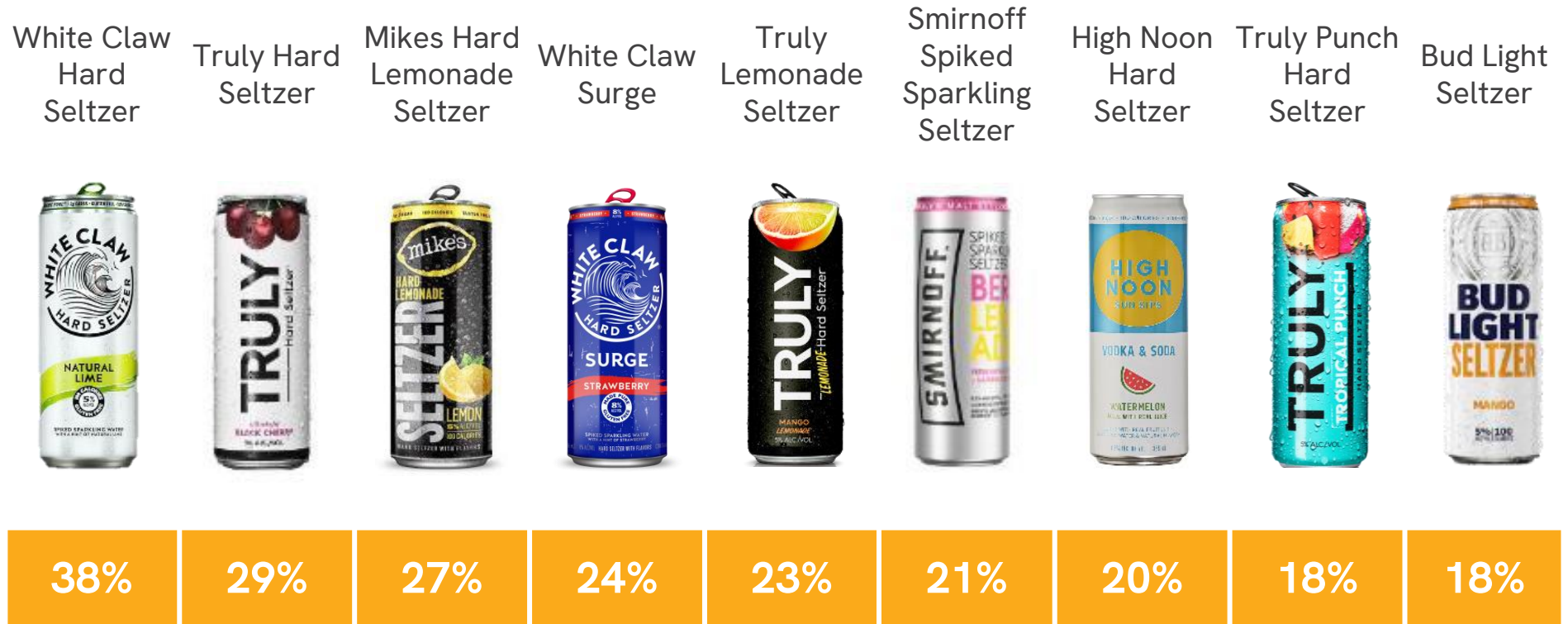


White Claw is the most popular hard seltzer brand consumers would drink if available in the On Premise, followed by Truly and Mikes Hard Lemonade

Top hard seltzer brands would drink if available in the On Premise

Percentage of category consumers who...

...would drink the brand

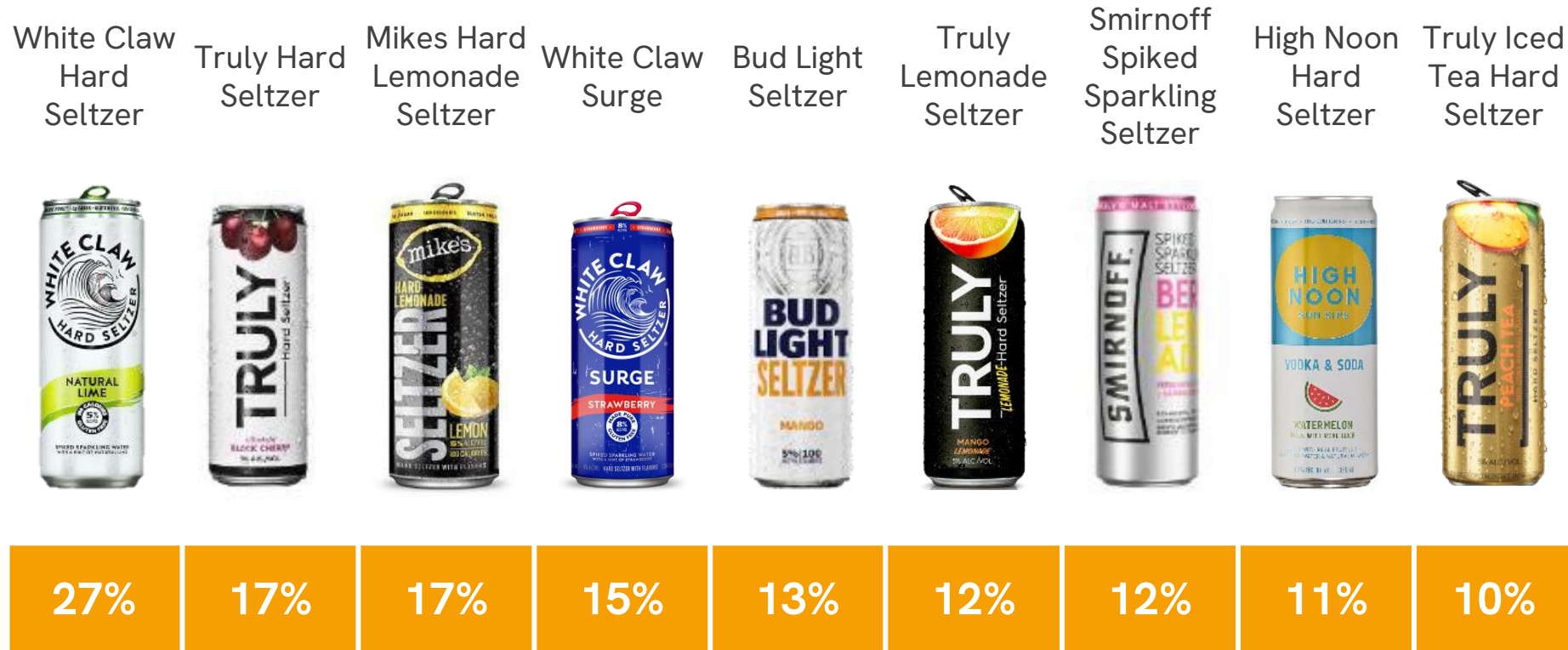


White Claw leads hard seltzer consumption, with almost 3 in 10 consuming the brand in the On Premise over the past 3 months

Top hard seltzer brands consumed in the On Premise












Percentage of category consumers who...

...have drank in the brand



Consumers are willing to drink a wide range of hard seltzer flavors, with berry and lemonade being on top

Flavors of hard seltzers consumed

Berry	Lemonade	Mango	Pineapple	Black cherry	Wild berry	Lime	Cherry	Lemon	Margarita	Fruit punch
35%	34%	33%	33%	32%	30%	28%	27%	27%	27%	27%
										



Q: Which of the following flavors of hard seltzers do you tend to drink?
Please select all that apply

Source: CGA by NIQ OPUS US (Spring 2024) - Sample Size: 2112

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\$7.81

is the average price hard seltzer
drinkers would be willing to spend on a
12oz can

Ready-to-drink alcohol

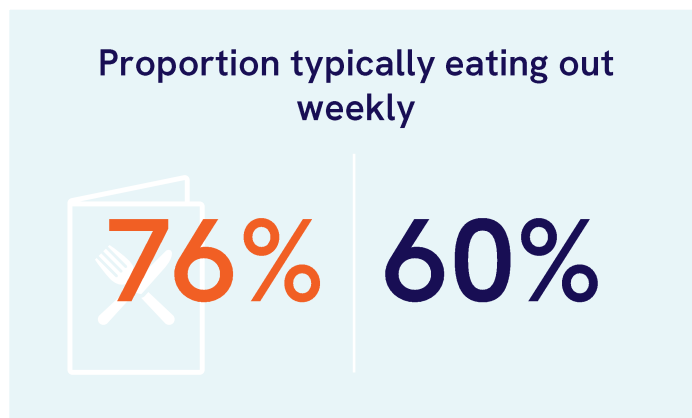
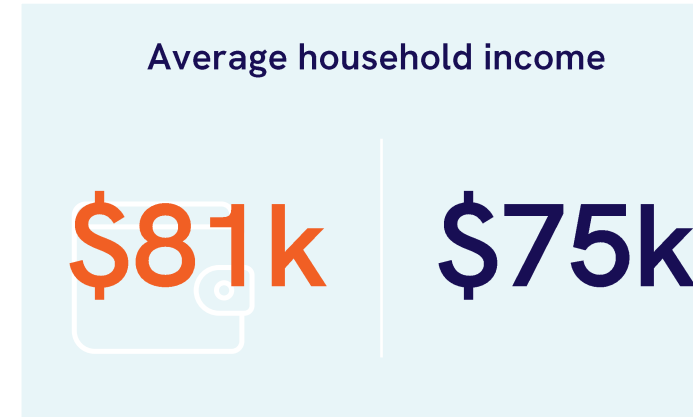
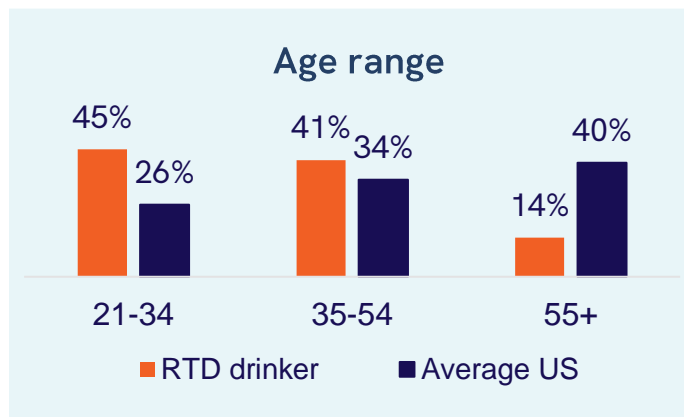
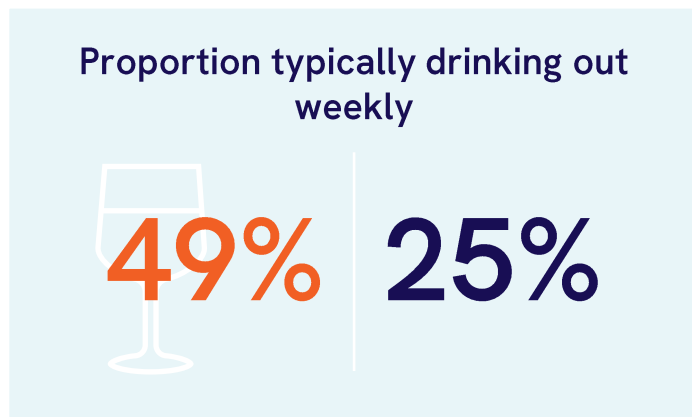


17%

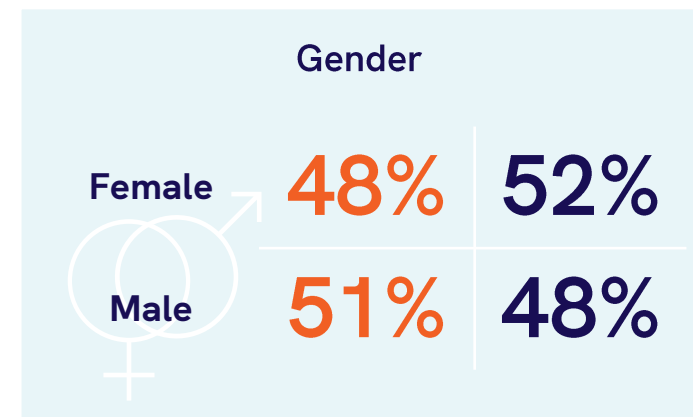
of On Premise consumers
drink ready-to-drink alcohol
out-of-home



RTD drinkers skew younger and are more active visitors to the On Premise than average consumers



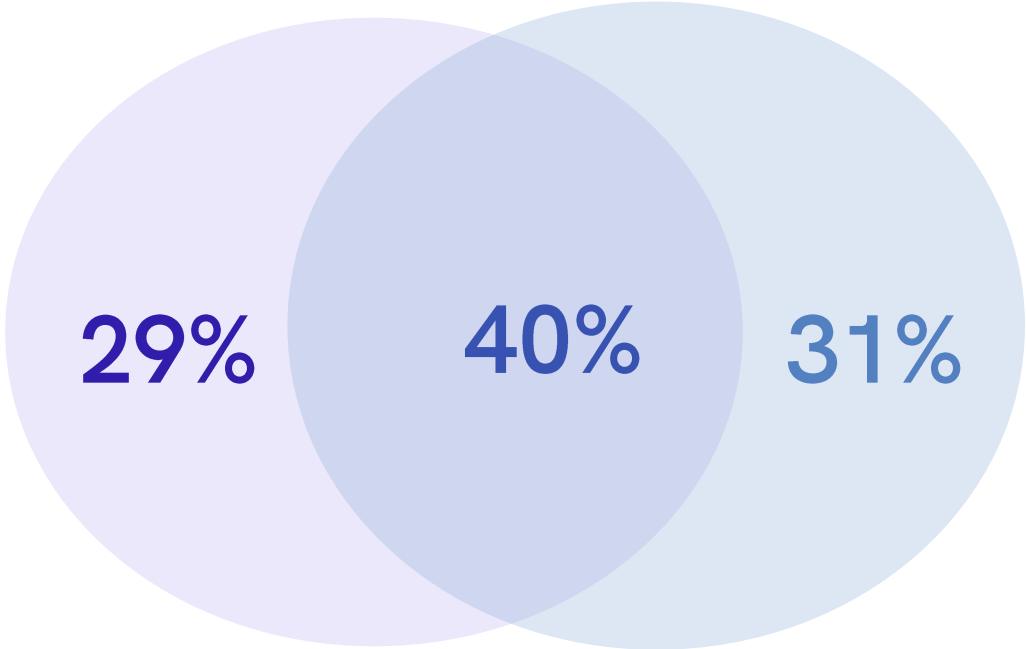
RTD drinker vs Average US consumer



Both drink and food-led occasions are common for RTD consumption, with drink-led being slightly more favored

Occasions consumed RTDs

Food-led occasions



Drink-led occasions



Q: On which occasions would you generally drink ready-to-drink alcohol?

Source: CGA by NIQ OPUS US (Spring 2024) - Sample Size: 2278

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A range of RTD types are consumed in the On Premise, with pre-mixed cocktails being the most popular

Types of RTDs consumed

**Pre-mixed
cocktails**



54%

**Spirit with
mixer**



45%

**Single serve wine
in a can/bottle**



45%

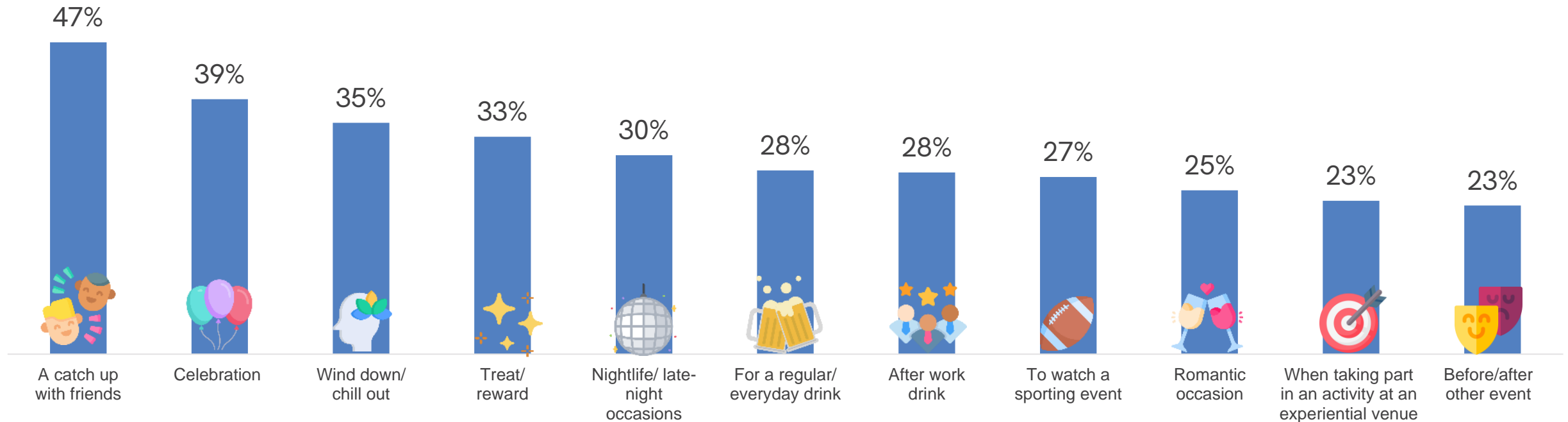
For RTD spirit and mixers, vodka is the standout spirit base selected in the On Premise, with tequila and whiskey also proving popular

Popular spirit bases: RTD spirit and mixers



On Premise visitors consume RTDs at a variety of occasion types, with a catch up with friends being the most common

% of consumers having RTDs during drink-led occasions



Q: For which occasions do you drink ready-to-alcohol when visiting bars, restaurants or similar venues? Please select all that apply

Source: CGA by NIQ OPUS US (Spring 2024) - Sample Size: 2284

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Beyond good value for money, day part, having a range of flavors available and friend recommendations are key influences to drink RTDs

Influences to drink RTDs



Good value for money



The time of day



Range of flavors available



Friend recommendations



Special offers/discounts



The type of venue I am at



Alcohol content (% ABV)



Menu recommendations



New and interesting brand



I always go with my favorite brand

Showcasing the quality of your brand and providing a range of flavors will generate the most engagement with consumers

Most important factors to consider when choosing a RTD brand

The quality of the product	57%
Range of flavors available	47%
The alcoholic base of the drink (e.g. malt, sugar or spirits based)	37%
The reputation of the brand	35%
The bottle/can design	21%
That it has no artificial ingredients	18%
How many calories it contains (light version)	18%
Social media presence and advertising	17%



RTD consumers would drink a range of brands if available, with Smirnoff Ice Cocktails and Twisted Tea being the most desired

Top 10 RTD brands would drink if available in the On Premise



Percentage of category consumers who...
...would drink the brand



Q: Which of the following ready-to-drink alcohol brands would you drink, if they were available on your visits to a bar, restaurant or similar venue? Please select all that apply

Source: CGA by NIQ OPUS US (Spring 2024) - Sample Size: 2529

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The 3 most consumed RTD brands align closely with the most desired brands, however Twisted Tea jumps into the number one spot

Top 10 RTD brands consumed in the On Premise



\$8.01

is the average price RTD drinkers would
be willing to spend on a 12oz can



Contact Us

To learn more or to speak to a member of the team, please feel free to get in touch:



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