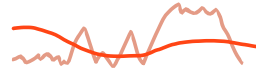


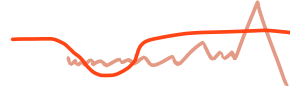
MIXOLOGY

+60%

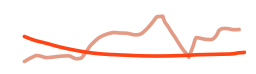


MINDFUL DRINKING

+35%

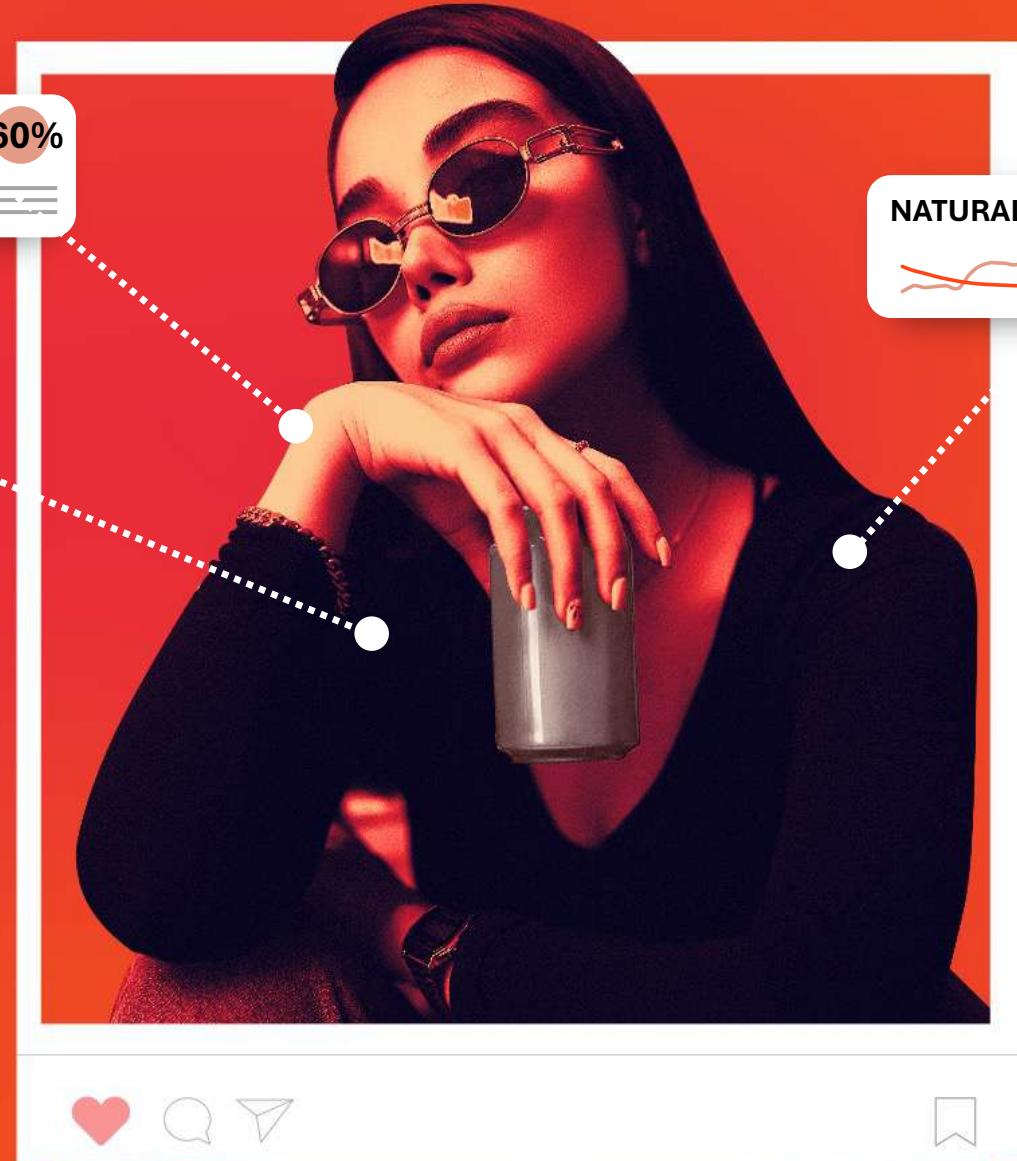


NATURAL FLAVOR +5%



THE FUTURE OF RTDs

The **Now**, **Next** and **Future** of Drinking



The RTD space has exploded

Back in 2017, our AI-powered data predicted the emergence of **Hard Seltzers**.

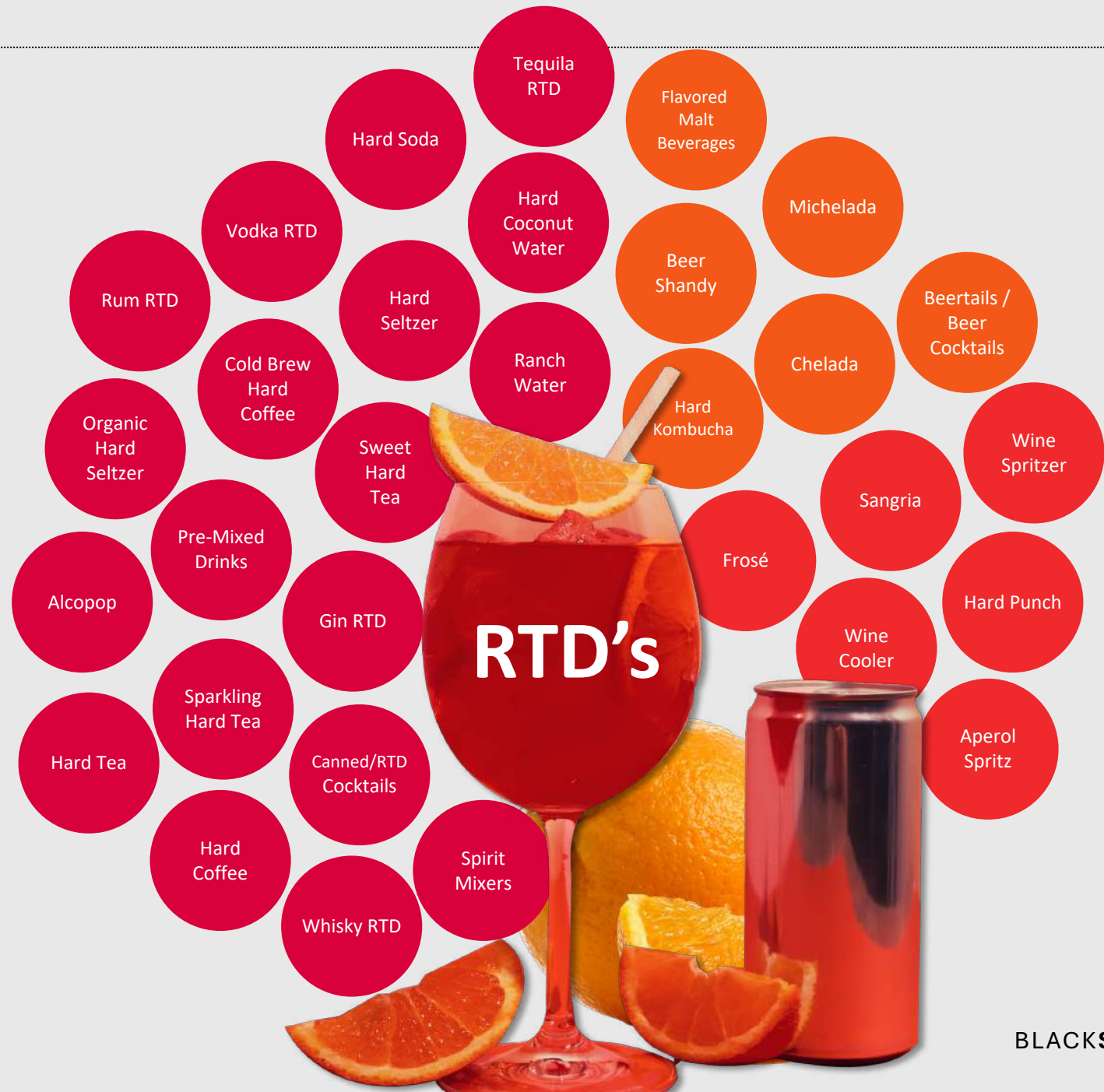
8 years and billions of dollars in sales later, a wild array of ready-to-drink products are now available.

But as the space gets more and more crowded – brands are finding it harder to differentiate and remain relevant to consumers.

In this report we will explore how can brands can innovate in this space – now, next and in the future.

KEY: _____

- SPIRITS & LIQUEURS
- BEER & CIDER
- WINE & BUBBLES



We are Black Swan Data

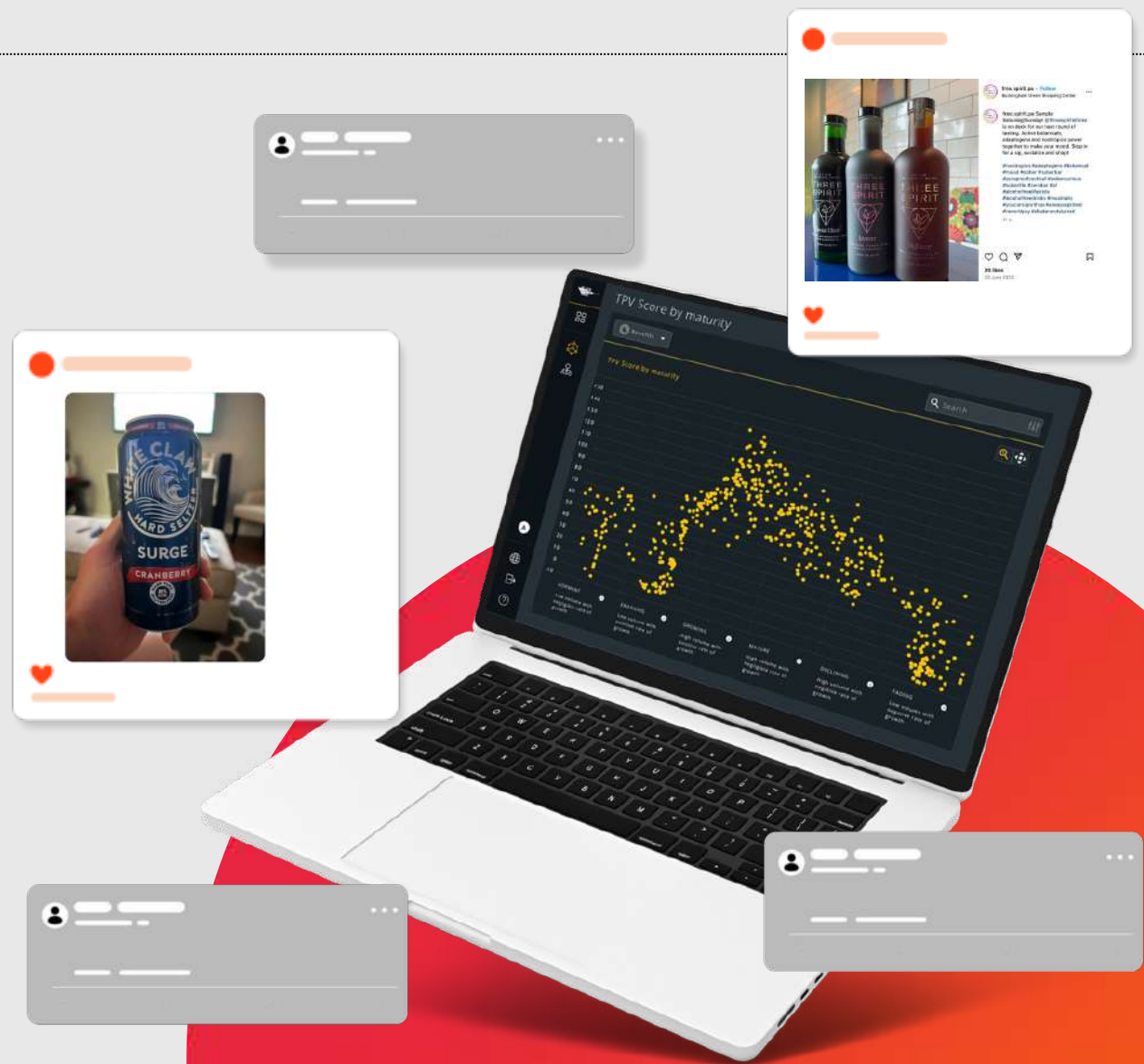
The insights inside this report do not come from surveys, panels or focus groups. There are no questions asked. Nor any prompted responses.

Our technology applies AI and predictive analytics to millions of social and online data points to understand behavioral trends.

It identifies, connects and predicts emerging trends and future consumer needs with **89%** accuracy.

We offer solutions that leverage this data and enable brands to make faster, confident, evidence-driven decisions along the innovation process.

It's innovation down to a science.



A different approach

This report was created using our
consumer intelligence platform

How does it work?

Our platform retrieves all the relevant consumer conversations in a category; in this example, **8+ million USA, Spirits & Liqueurs** conversations.

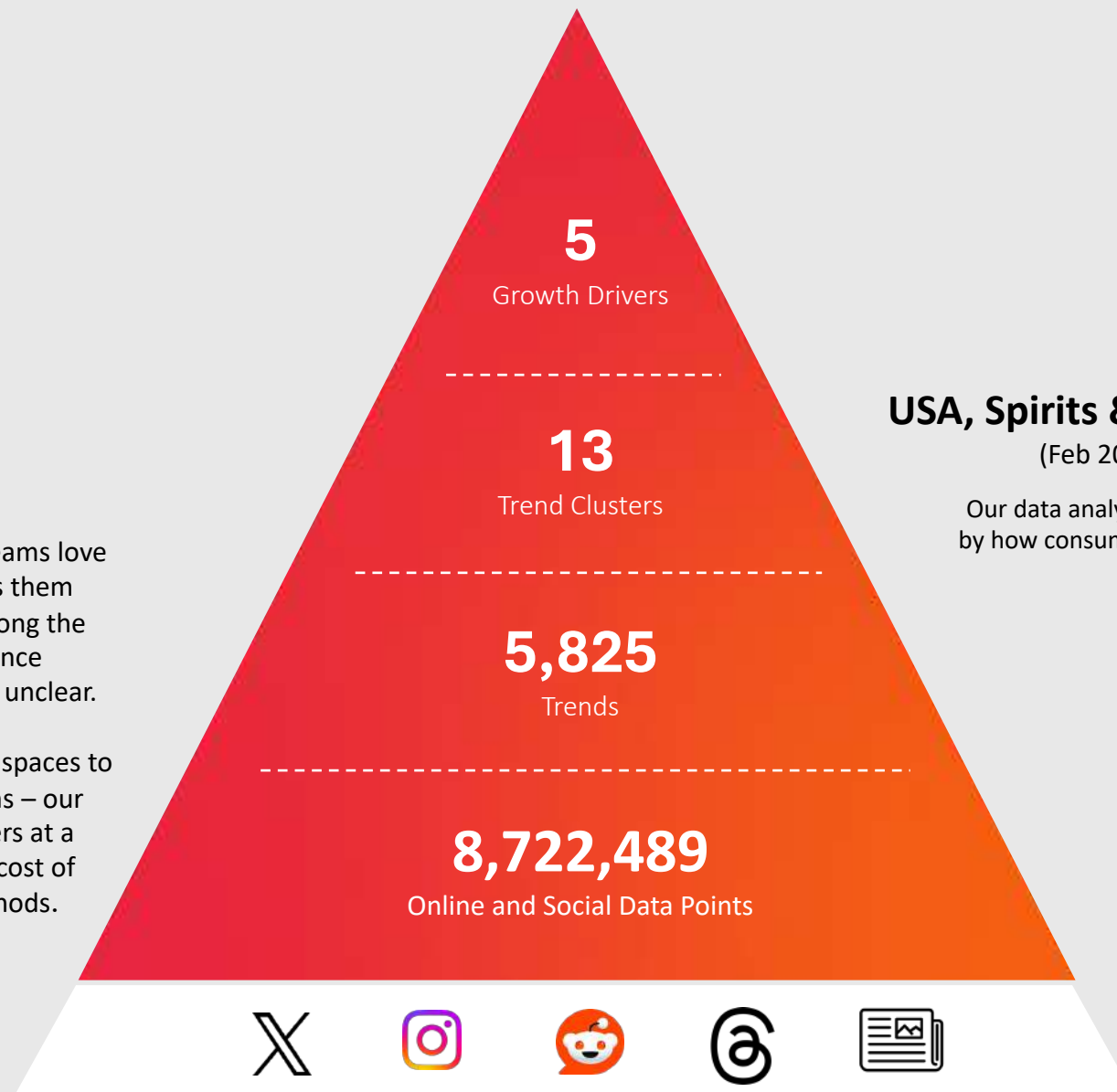
We use AI and data science to isolate all the individual trending topics and understand how they ladder-up into macro category growth drivers.

This dynamic segmentation framework is refreshed monthly and evolves as consumers and the category evolves.

Game-changing capabilities

Insight and Innovation teams love using this data as it helps them make better decisions along the NPD process when evidence is lacking and the path is unclear.

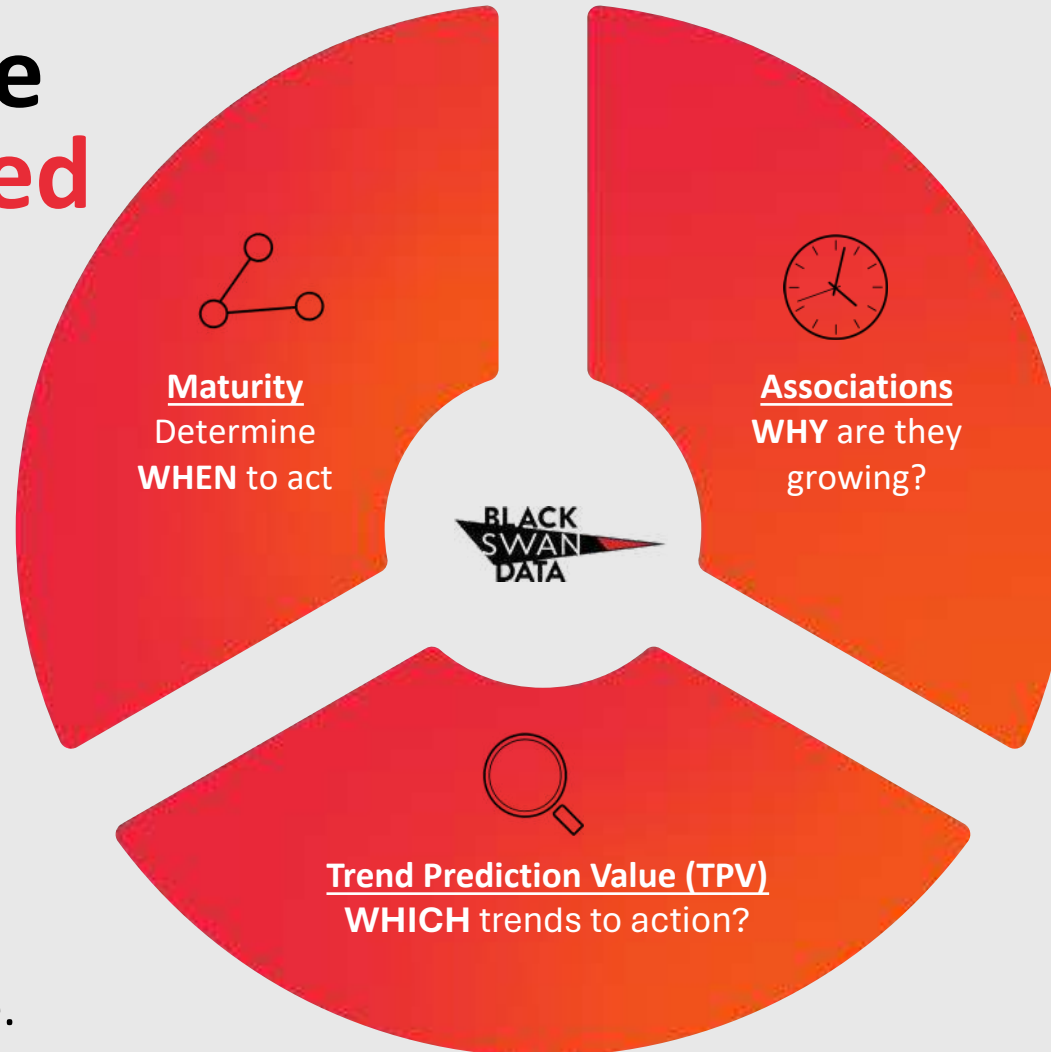
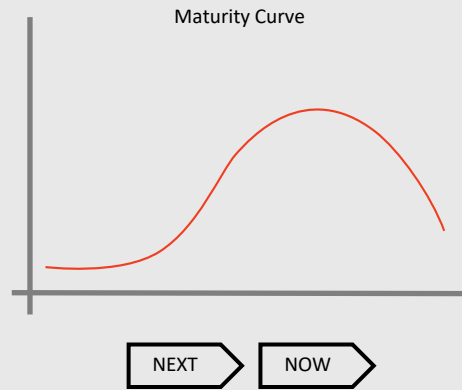
From activating demand spaces to optimizing on-pack claims – our solutions give you answers at a fraction of the time and cost of traditional research methods.



USA, Spirits & Liqueurs (Feb 2022 – Feb 2024)

Our data analyzes the category by how consumers actively talk about it online.

Our data science metrics explained



Conversation
Volume

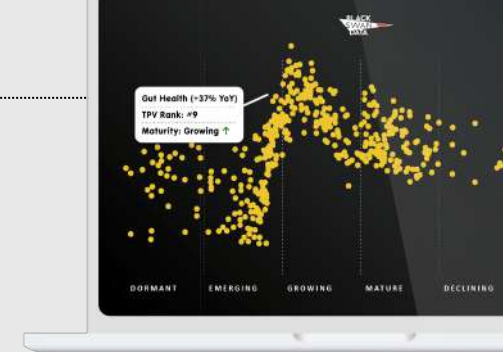


Conversation
Growth



Future
Forecast

Know **WHAT** trends to prioritize.
WHY they should be activated.
And **WHEN** to act on them.



0%

100%

0% means these
trends are not
talked about
together; there's
no association

100% means
they always
appear together;
there's a high
association

Why are consumers choosing RTDs?

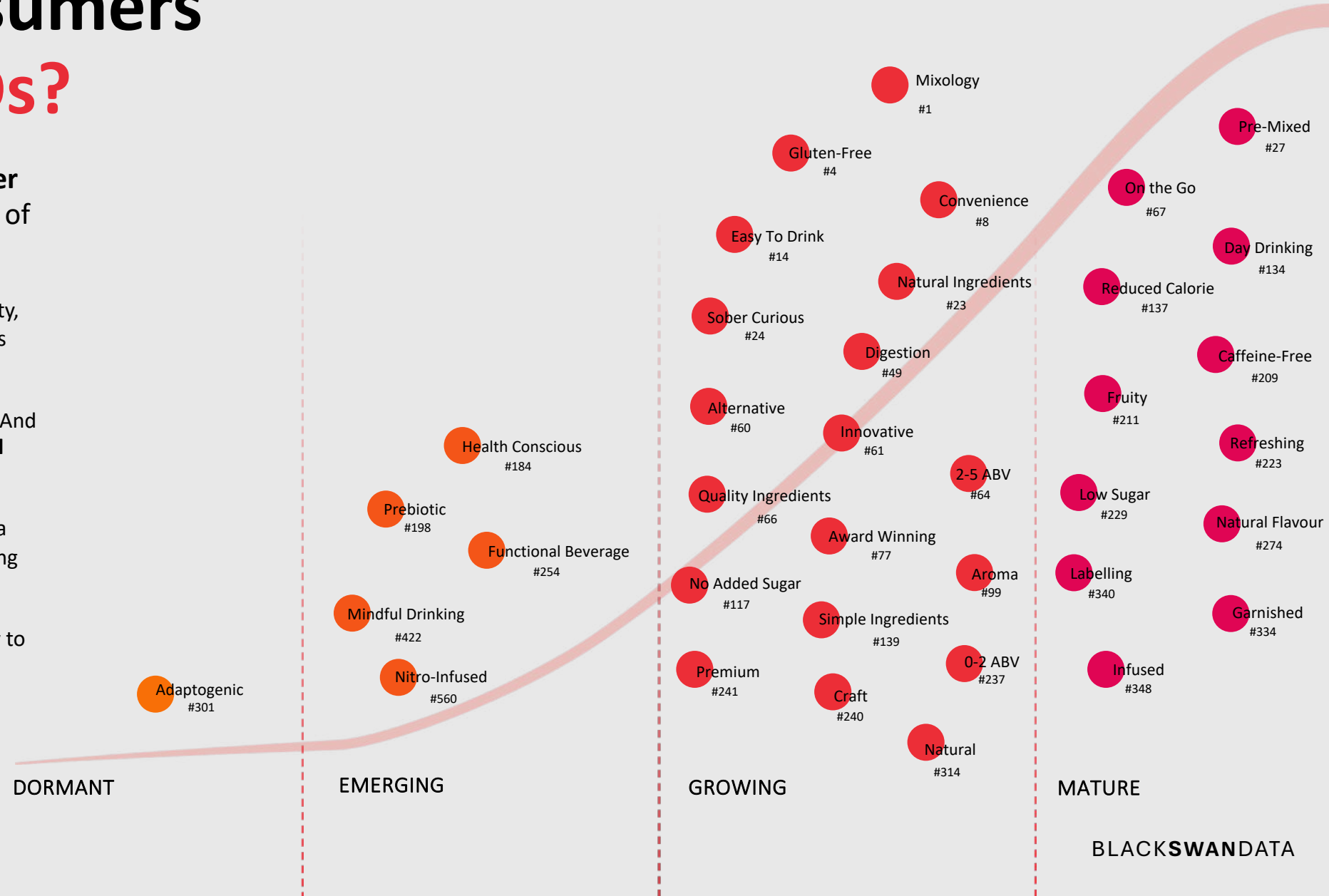
We have surfaced all the **consumer needs** talked about in the context of RTDs.

These needs are at different stages of maturity, ranging from more established, mature needs such as **Reduced Calorie** or **Low Sugar**.

Growing needs like **Premium** and **Mixology**. And emergent, more niche needs such as **Mindful Drinking** and **Functional Beverages**.

Consumers are expecting RTDs to deliver on a wide variety of needs while offering something different and experimental.

For brands, there remains ample opportunity to innovate within this sub-category.



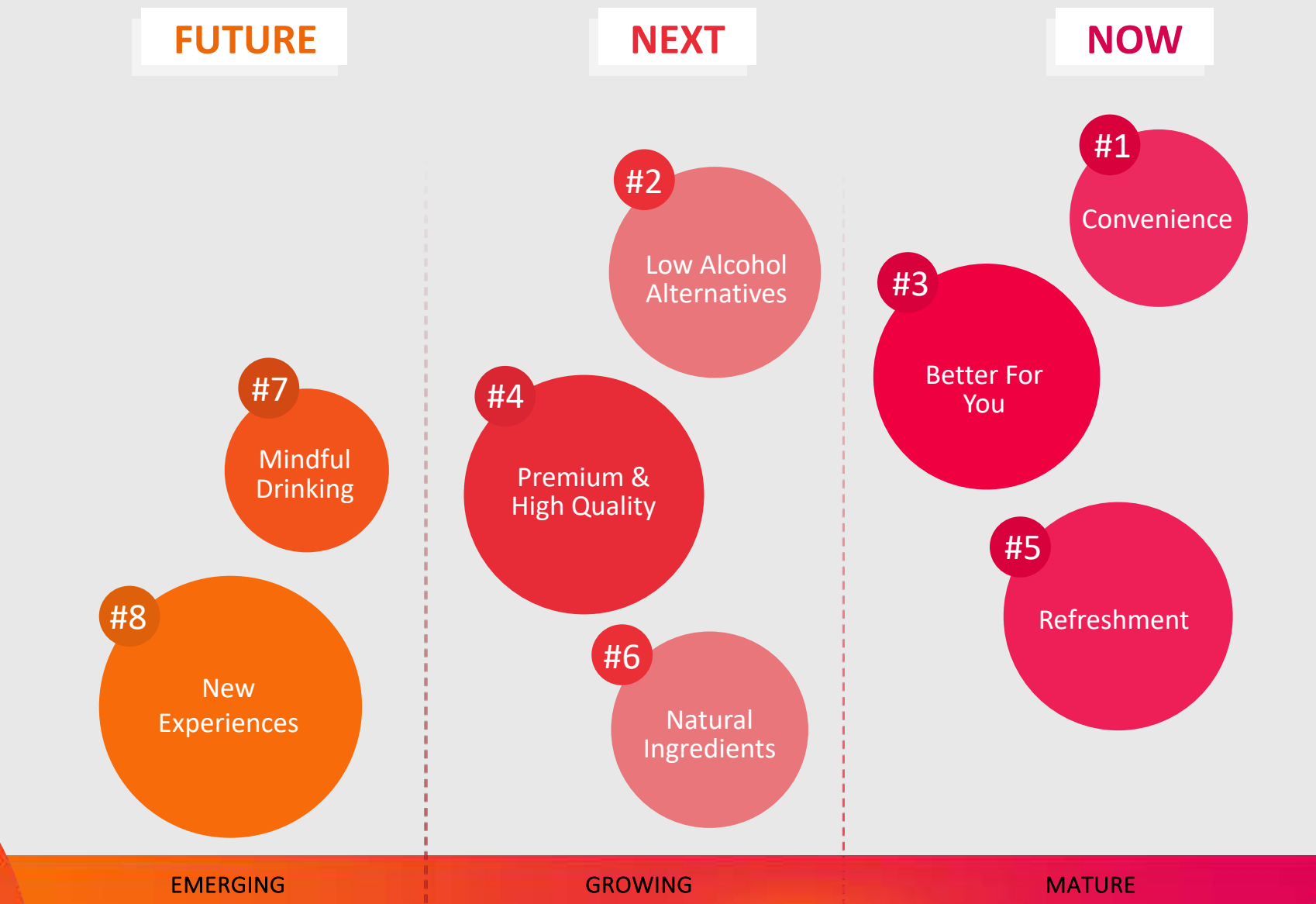
Now, next and future needs

We've clustered the individual consumer needs into larger, thematic need-spaces – from **Convenience** to **New Experiences**.

They represent the key needs for RTD consumers in the USA.

Based on the growth and volume of each space, we can map them onto a maturity curve.

This helps us establish which should be acted on now, next or in the future.





THE NOW

We’re going to focus on the mature, **Better For You** need-space and consumers' evolving demands related to health.

They are seeking RTDs that fit within their weight-loss and wellness goals.

No Added Sugar, Digestive Health and **Gluten-Free** are among several trends gaining momentum right now.

Better For You		
Trend	TPV	Volume
Gluten-Free	4	6,164
Digestive Health	49	2,328
No Added Sugar	125	547
Reduced Calorie	133	1,147
Caffeine-Free	209	1,310
Low Sugar	219	846
Nutritional Labelling	344	24,104



Inside Better For You

Our data tells us that consumers turn to **Hard Seltzers** for their health credentials – but two unmet needs are emerging related to flavor and specific dietary requirements.

Dietary requirements: Consumers choose to drink Hard Seltzers and similar products because they are **Low Sugar** and **Low Carb**.

They are perfect for drinkers who are **Calorie Counting**.

But consumers are now searching for options that fit in with more specific diets, such as **Keto-Based** and **Gluten-Free**.

Elevated flavors: Consumers are looking for healthier RTDs with authentic, bolder flavor combinations.

In their opinion, Hard Seltzers taste artificial and lack flavorful punch.

They're seeking beverages which are made of (and taste of) **Natural Ingredients** including real fruits.

Gluten Free

TPV #4
Vol: 6,172
Growth: +X%

Artificial Flavoring

TPV #265
Vol: 812
Growth: -4%

Low Carb

TPV #204
Vol: 1,065
Growth: +2%

Natural Flavor

TPV #275
Vol: 1,005
Growth: +5%

Calorie Counting

TPV #296
Vol: 295
Growth: +1%

Natural Ingredients

TPV #23
Vol: 2,106
Growth: +19%

Trends associated
with **Better For You**

Innovation springboard

Using our platform, we've surfaced trends that can help solve the **flavor problem** for Hard Seltzers.

Consumers want brands to move beyond basic fruit flavors.

Flavors inspired by cocktails and desserts, such as **Pina Colada** and **Dreamsicle** are an exciting, emerging area.

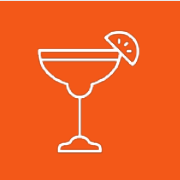
A dessert-inspired hard seltzer, infused with purees to add texture will allow consumers to indulge – without the excess sugars and calories.



COCKTAILS



Dreamsicle
TPV #144
Vol: 225
Growth: +1%



Daiquiri
TPV #57
Vol: 11,108
Growth: +16%



Margarita
TPV #262
Vol: 69,751
Growth: +26%



Pina Colada
TPV #64
Vol: 7,694
Growth: +5%

INGREDIENTS



Citrus
TPV #540
Vol: 24,031
Growth: +19%



Watermelon
TPV #547
Vol: 17,357
Growth: +14%



Passion Fruit
TPV #455
Vol: 9,328
Growth: +13%



Fruit Purée
TPV #196
Vol: 379
Growth: +10%

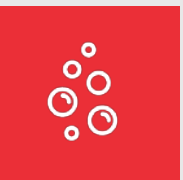
Trends associated with **Hard Seltzers**



TASTING NOTES



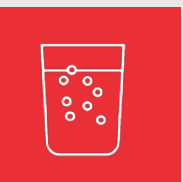
Crisp
Vol: 6,382
Growth: +2%



Fizzy
Vol: 3,072
Growth: -5%



Bold
Vol: 1,267
Growth: +9%



Effervescent
Vol: 775
Growth: +3%

THEMES



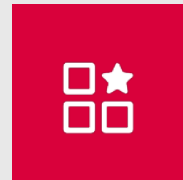
Gluten-Free
TPV #4
Vol: 6,164
Growth: +22%



Bold Flavour
TPV #79
Vol: 1,228
Growth: +21%



Innovative
TPV #61
Vol: 16,038
Growth: +18%



Unique
TPV #251
Vol: 49,535
Growth: +20%

Brand spotlight



Smooj is a Michigan-based smoothie brand that offers hard seltzer smoothies in a RTD format.

Their slogan? The "seltzer is boring and we are not".

Their products deliver bold, natural flavor combinations, including Strawberry and Banana and a Pina Colada (with real fruit).

These hard smoothies are low in calories, carbs and sugar. As well as being gluten and dairy-free.

Smooj is winning in the "I'm healthy and I'm tasty" arena.



Natural Ingredients

TPV #23
Vol: 2,106
Growth: +19%

Natural Flavor

TPV #275
Vol: 1,005
Growth: +5%

Simple Ingredients

TPV #237
Vol: 456
Growth: +13%

Gluten-Free

TPV #4
Vol: 6,164
Growth: +22%

Pina Colada

TPV #64
Vol: 7,694
Growth: +5%

Trends associated with **Smooj**

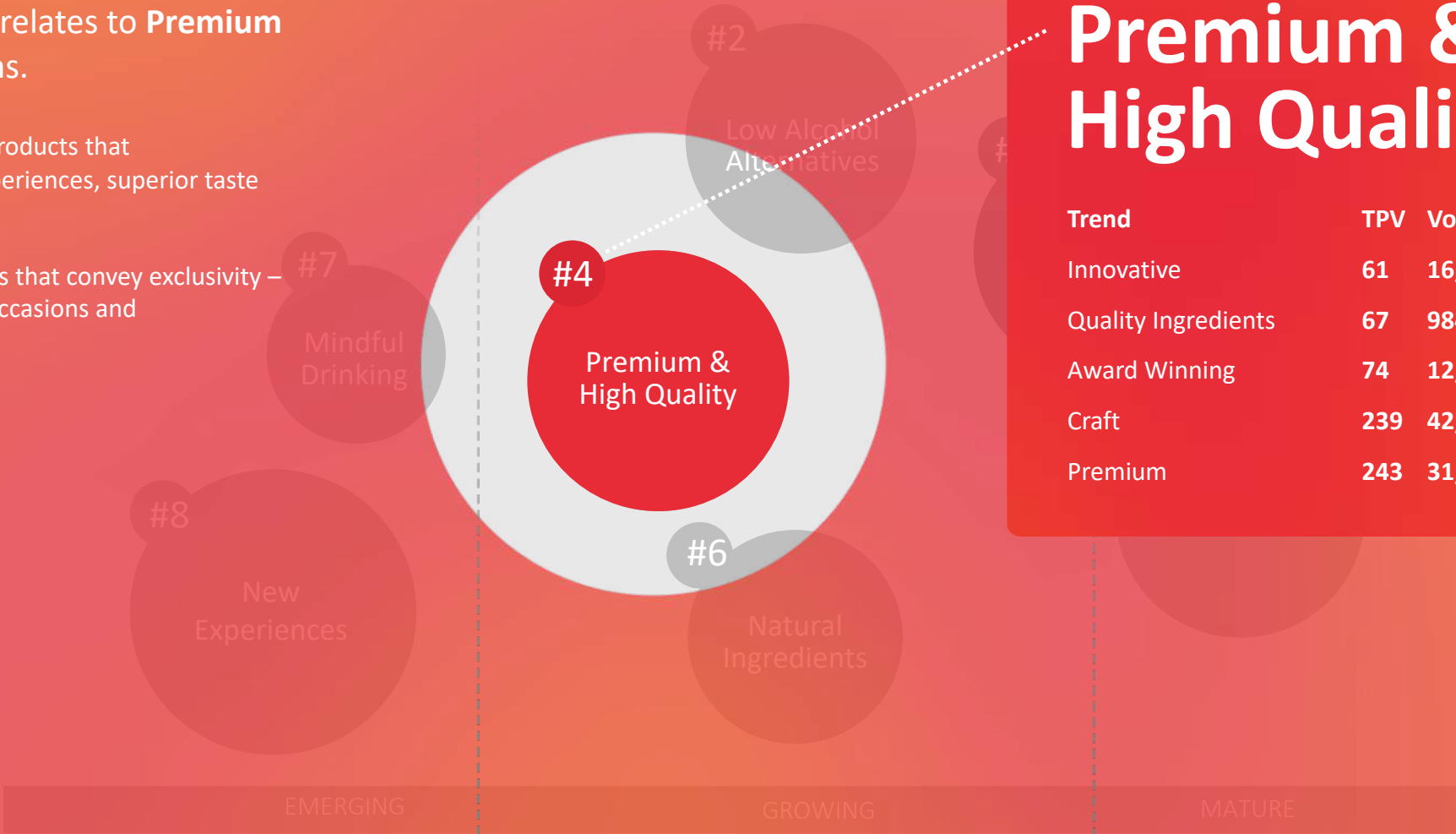
THE NEXT



What's next for RTDs? We've identified a growing need-space within our Spirits & Liqueurs dataset that relates to **Premium & High Quality** options.

Consumers are demanding products that offer heightened sensory experiences, superior taste and unique ingredients.

They are being drawn to RTDs that convey exclusivity – a means of elevating social occasions and expressing personal tastes.



Premium & High Quality

Trend	TPV	Volume
Innovative	61	16,038
Quality Ingredients	67	984
Award Winning	74	12,506
Craft	239	42,446
Premium	243	31,213

Inside Premium & High Quality

Consumers are demanding premium RTDs that mimic the experience of **bar-quality drinks**.

Demand is growing for crafted alcoholic beverages made of high-quality ingredients that provide portability and diverse flavors.

But beyond taste and convenience, they're searching for products that hint at **Craftmanship** and are **Worth Spending More For**.

Our data suggests consumers view **Canned Cocktails** as a premium option.

But it also reveals an unmet need and gap in the market for RTDs that align with the bar-quality experience.

Drinks that elevate special (and unspecial) occasions.

Trends associated with Premium & High Quality

Worth Spending More For
TPV #159
Vol: 6,452
Growth: +11%

Authentic Taste
TPV #180
Vol: 248
Growth: +39%

Exciting
TPV #54
Vol: 14,699
Growth: +16%

Experiential
TPV #126
Vol: 583
Growth: +16%

Canned Cocktails
TPV #318
Vol: 3,967
Growth: -29%

Jeff Rider- #C2E2 Artist Alley W-19!
@cloudwrangler
Highly recommend Cutwater canned cocktails, if you can find em. No high fructose, quality drinks with quality ingredient
4:59 PM · Jun 26, 2022

Skus
@SkusRecentEats
One interesting whiskey trend that I never would have predicted is the return and premiumization of Bottled in Bond whiskeys. Ten years ago, I counted 18 total on the market, mostly really cheap.
recenteats.blogspot.com/2013/02/whiske...
11:23 PM · Feb 17, 2023 · 4,242 Views

The rise of premium spirits

Our data suggests the road to premiumization for RTDs is via the **diversification of spirits** in the alcohol base.

Consumers want **Premium** and **Craft Whisky, Gin and Vodka**, as well as their flavored variations in a RTD format.

It's a departure from existing RTDs – which mostly use neutral spirits.

The demand for premium spirits and liqueurs reflects a shift toward more discerning consumption habits.

Consumers are prioritizing indulgence and sophistication within the RTD space.



Craft Gin
TPV #90
Vol: 750
Growth: +19%

Premium Rum
TPV #247
Vol: 484
Growth: +4%

Craft Vodka
TPV #202
Vol: 423
Growth: +9%

Premium Gin
TPV #148
Vol: 408
Growth: +28%

Premium Vodka
TPV #39
Vol: 1,817
Growth: +13%

Premium Whisky
TPV #61
Vol: 1,729
Growth: +13%



Products associated with **Premium & High Quality**

Brand spotlight



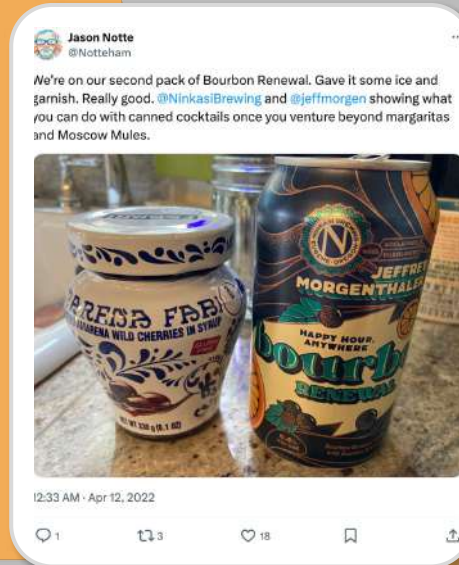
We've spotlighted **Ninkasi Brewing**, a brand already activating in the premium RTD space.

They offer portable, high-end canned cocktails – created by the renowned mixologist, Jeffrey Morgenthaler.

According to Food & Wine Magazine, he's one of the Top 10 most influential bartenders of the past decade.

Their **Bourbon Renewal** blends a premium whisky base with natural ingredients like zesty lemon and sweet blackcurrant.

It's a carefully curated, bar-like cocktail in a can that delivers a high-end experience on the go.



Mixology

TPV #1
Vol: 13,571
Growth: +60%

Craftmanship

TPV #2
Vol: 2,811
Growth: +59%

Natural Ingredients

TPV #23
Vol: 2,106
Growth: +19%

Award Winning

TPV #74
Vol: 12,506
Growth: +12%

Exclusive

TPV #108
Vol: 20,515
Growth: +16%

Trends associated with
Ninkasi Brewing

Premium Whisky

TPV #61
Vol: 1,729
Growth: +13%

THE FUTURE



Mindful Drinking is an emerging need-space in the RTD sub-category.

This trend reflects a broader cultural shift towards more conscious and intentional drinking habits.

Consumers seek to enjoy the pleasures of drinking alcohol, while also prioritizing their physical and mental wellbeing.

Mindful drinkers are moderating their intake, not abstaining.

And seeking RTDs that serve relaxed and upbeat occasions, but in a balanced and healthy way.



Inside Mindful Drinking

The Mindful Drinking trend can be broken down into four, overlapping consumer needs – **clean drinking**, **wellness**, **reduced consumption** and **calming**.

Clean drinking relates to the demand for simpler, more natural recipes. For RTDs that authentically taste like their ingredients.

Wellness is connected to holistic health – specifically relaxation, digestive health and hydration.

Reduced consumption is not obsessive restriction or abstinence. Low ABV options allow consumers to indulge and enjoy drinking while avoiding the side-effects of excess.

Consumers are also searching for RTDs that help them relax and unwind after work and before sleep. They associate adaptogens, herbs and botanicals with calming properties.

Trends associated with Mindful Drinking

Clean Drinking

TPV #124
Vol: 295
Growth: +29%

Reducing Consumption

TPV #502
Vol: 21
Growth: +91%

Wellness

TPV #39
Vol: 1078
Growth: +16%

Low ABV

TPV #64
Vol: 4711
Growth: +13%

Calms

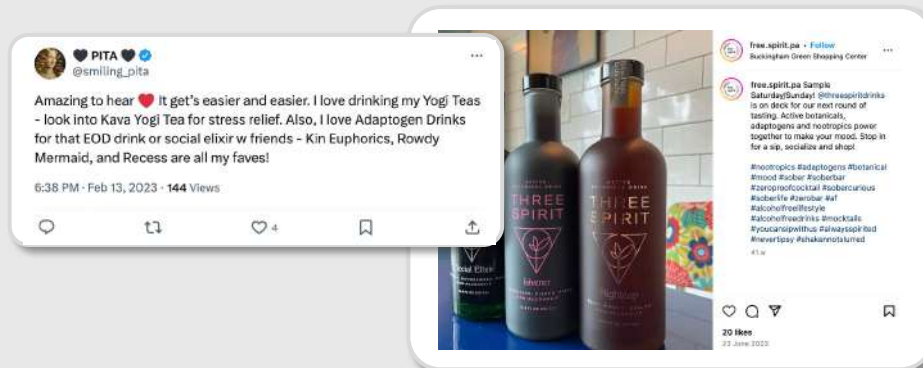
TPV #107
Vol: 3413
Growth: +3%

Authentic Taste

TPV #180
Vol: 248
Growth: +39%

Simple Ingredients

TPV #237
Vol: 456
Growth: +13%



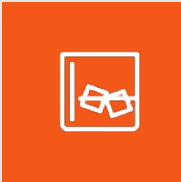
Innovation springboard

How to innovate in the **Mindful Drinking** space:

Our data reveals that a need-space is emerging related to balanced wellness and conscious consumption.

We've put together a springboard of trends associated with these key needs to ideate a new, ultra-relevant RTD concept.

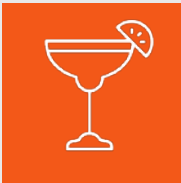
ALCOHOL TYPE



Patxaran
TPV #659
Vol: 81
Growth: +10%



Botanical Spirit
TPV #185
Vol: 257
Growth: +34



Aperitif
TPV #321
Vol: 11,480
Growth: +19%



Herbal Bitters
TPV #170
Vol: 200
Growth: +54%

INGREDIENTS



Nopal
TPV #669
Vol: 63
Growth: +16%



Magnesium
TPV #258
Vol: 562
Growth: +7%



Manuka Honey
TPV #441
Vol: 186
Growth: +27%



Electrolyte
TPV #66
Vol: 1,703
Growth: +27%

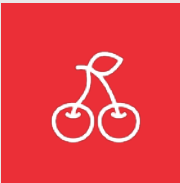
Trends associated
with **Mindful Drinking**



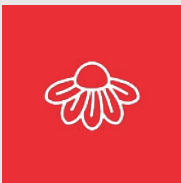
FLAVOURS



French Lavender
TPV #973
Vol: 33
Growth: +21%



Sour Cherry
TPV #115
Vol: 1,287
Growth: +8%



Chamomile
TPV #58
Vol: 1,993
Growth: +9%



Rooibos
TPV #281
Vol: 402
Growth: +18%

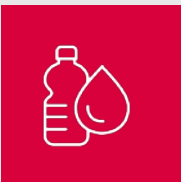
THEME



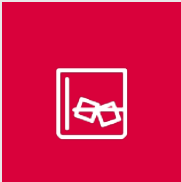
Relieves Stress
TPV #267
Vol: 466
Growth: +11%



Botanical
TPV #93
Vol: 10,518
Growth: +11%



Hydration
TPV #48
Vol: 4,033
Growth: +3



0-2 ABV
TPV #136
Vol: 563

New product concept

Introducing **Tranquil Twist NightCap**, a 2% ABV RTD designed to elevate evening relaxation rituals and promote restful sleep.

Mindful Drinking is an emerging, future need-space with limited RTD offerings on-shelf.

So we've used our data to create a 2% ABV nightcap-inspired concept with relaxing, hydrating properties.

Botanical Spirits can act as the low-alcohol base, while providing the complex flavor profile associated with late-evening drinks.

Nopal is an ingredient known for relieving stress. Chamomile is a familiar flavor with relaxing properties.

Vanilla elevates the taste and has soothing effects.

Hydrating Electrolytes also help to promote relaxation and aid a restful night's sleep.



Relieves Stress

TPV #267
Vol: 466
Growth: +11%

Hydration

TPV #48
Vol: 4,033
Growth: +3%

Botanical Spirit

TPV #185
Vol: 257
Growth: +34

Chamomile

TPV #58
Vol: 1,993
Growth: +9%

Vanilla

TPV #707
Vol: 50,663
Growth: +12%

Electrolyte

TPV #66
Vol: 1,703
Growth: +27%

0-2 ABV

TPV #136
Vol: 563
Growth: +27%

Trends to leverage
for **Tranquil
Twist NightCap**

The now, next and future of RTDs

NOW

Health-conscious consumers are demanding **flavor innovation**. Artificial, weak and boring flavors are out. Bolder, more natural flavor combinations are in.

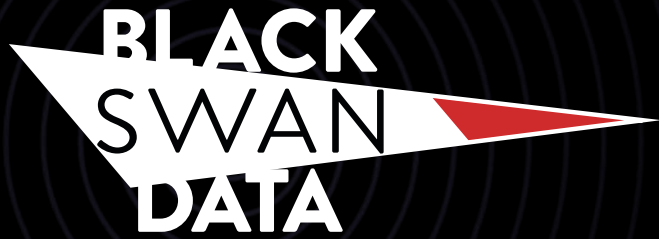
NEXT

Higher-quality spirits and liqueurs will drive premiumization in the RTD space. Consumers want **bar-quality drinks** at-home and on-the-go.

FUTURE

Relaxation is the 'watch this space' drinking occasion for 2025 as consumers prioritize balanced enjoyment.





See our data in action

Visit **blackswan.com** or **book a session** with one of our Insight and Innovation experts to understand how 50+ of the world's leading CPGs use predictive, social intelligence to win in their category.

[**BOOK HERE**](#)



MoëtHennessy



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