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Utilizing data to get consumers to 'pick' cider

Amid rising cost of living, what attributes do alcohol brands need to have? And what claims are just "nice to have"?



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Experts in what consumers want and why

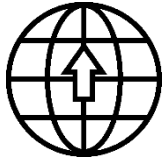


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TRENDS

Mintel is a world leader in trend spotting and market predictions with observers and analysts in 20 countries



CONSUMERS

Mintel conducts primary research with 40,000 consumers around the world every month



ANALYSTS

Mintel has 200 global category, consumer and functional analysts



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Mintel purchases 1,500 new products, in 62 countries, every day



MENU INSIGHTS

Collects 1,000s of US menus to track trends in menu optimization, flavors, ingredients and preparation



CONSULTING

Mintel strategists provide custom problem solving and actionable advisory

Mintel FlavourScape AI can accelerate innovation

1

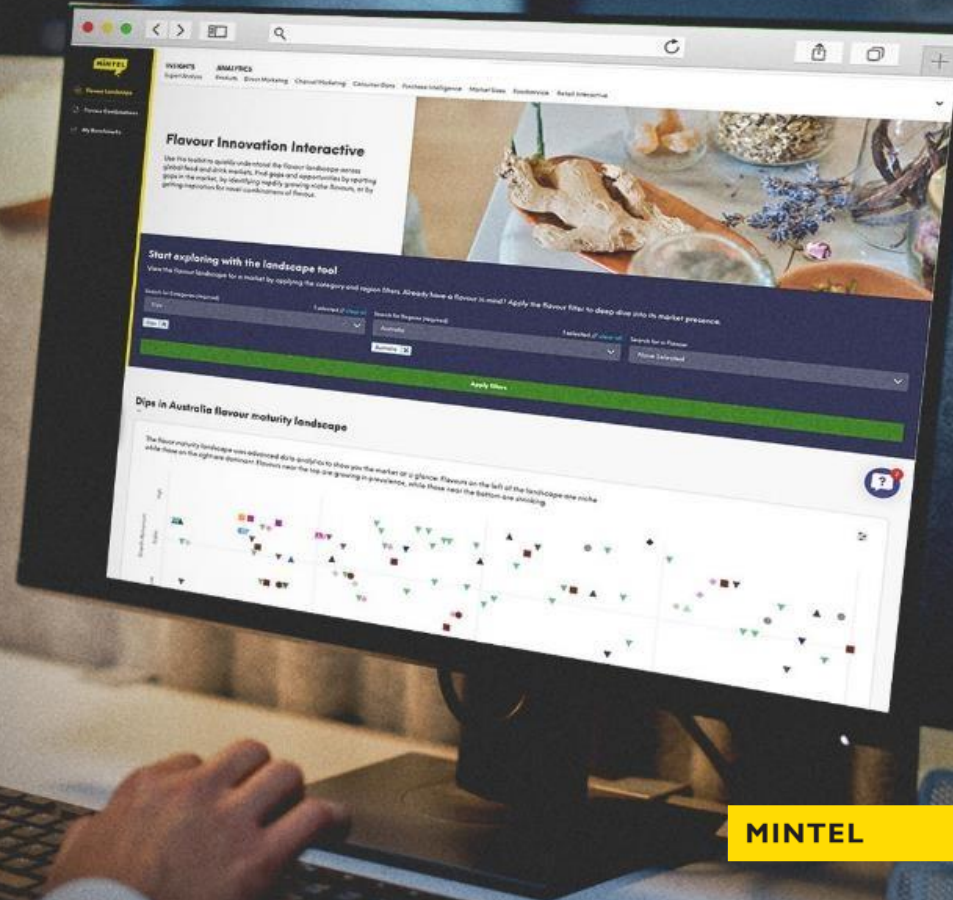
Mintel's global shopper network collects new products from 86 markets around the world.

2

Millions of meaningful data points from new food and drink product records from GNPD are continuously added, cleaned and structured, making it the perfect platform to track product innovation.

3

Mintel's Flavour Landscape Engine (FLE) transforms the data using three proprietary algorithms, making it easy to pinpoint the flavour trends most relevant to your market.



FlavourScape AI makes predictions based on four lifecycles

Predominant

Flavors that make up the bulk of the market.

In Top 10 global cider launch markets, Predominant flavors include Strawberry, Lime or Mango.

Established

Flavors that are not predominant yet but widely available.

In Top 10 global cider launch markets, Established flavors include Orange, Rosé and Cinnamon.

Emerging

Flavors that are just coming into their own, not yet established but not totally experimental either.

Novel

Flavors that are either new and experimental or focused on very niche products or specific consumer groups.

* Top 10 cider markets include UK, France, Norway, Australia, Finland, Latvia, Canada, Sweden, Germany and US
Source: Mintel FlavourScapeAI

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Agenda

Introduction: What's important to alcohol consumers? What are they drinking? Who are the key consumers for cider?

Two attributes that cider needs to have:

- 1.) Appealing flavors
- 2.) Cocktail inspiration and integration

Three attributes that are nice to have in cider:

- 1.) Less sugar
- 2.) Low and no alcohol
- 3.) "No"-stalgia, or leveraging the appeal of nostalgia to draw people to non-alcoholic ciders



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Price, flavor and occasion are all key considerations when US adults shop for alcohol

PRICE

52%

of US beer-buyers say price is a top beer purchase factor, followed by brand (48%) and flavor (43%).

FLAVOR

64%

of US RTD-buyers say flavor is a top purchase factor for ready-to-drink alcoholic beverages (RTDs)*.

OCCASION

73%

of US wine-buyers drink wine at home when having a party, 59% while watching TV shows/movies and 59% after work to unwind.

* [RTDs include](#) flavored malt beverages, prepared spirits-based cocktails and wine coolers

Base: US: 912 internet users aged 22+ who have purchased beer from a store or for delivery (not from restaurants/bars) in the three months to July 2022; US: 1,171 internet users aged 22+ who purchased RTD alcoholic beverages in the three months to Sept 2022; US: 829 internet users aged 22+ who have purchased wine from a store or for delivery (not from restaurants/bars) in the three months to July 2022

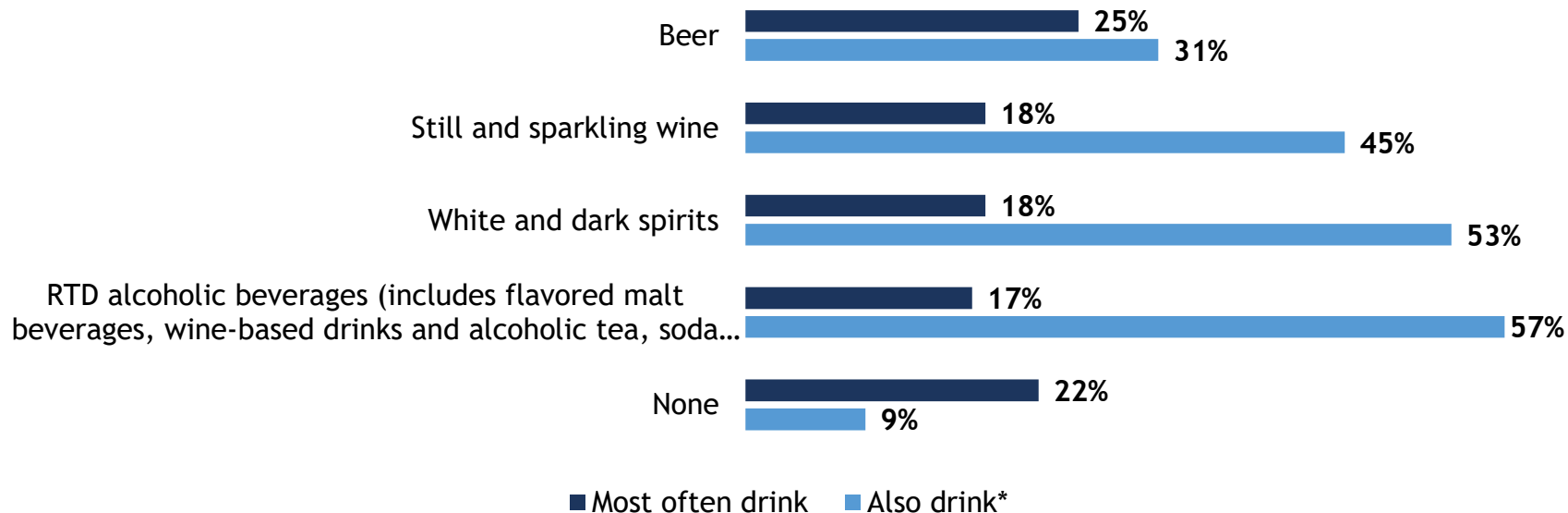
Source: Kantar Profiles/Mintel from Mintel Reports: [Beer - US - 2022](#), [RTD Alcoholic Beverages - US - 2022](#), and [Wine - US - 2022](#)

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Variety keeps things fresh for US adults

US: alcoholic beverages consumed, most often and also drink, 2023

% of adults aged 22+ and *alcohol consumers



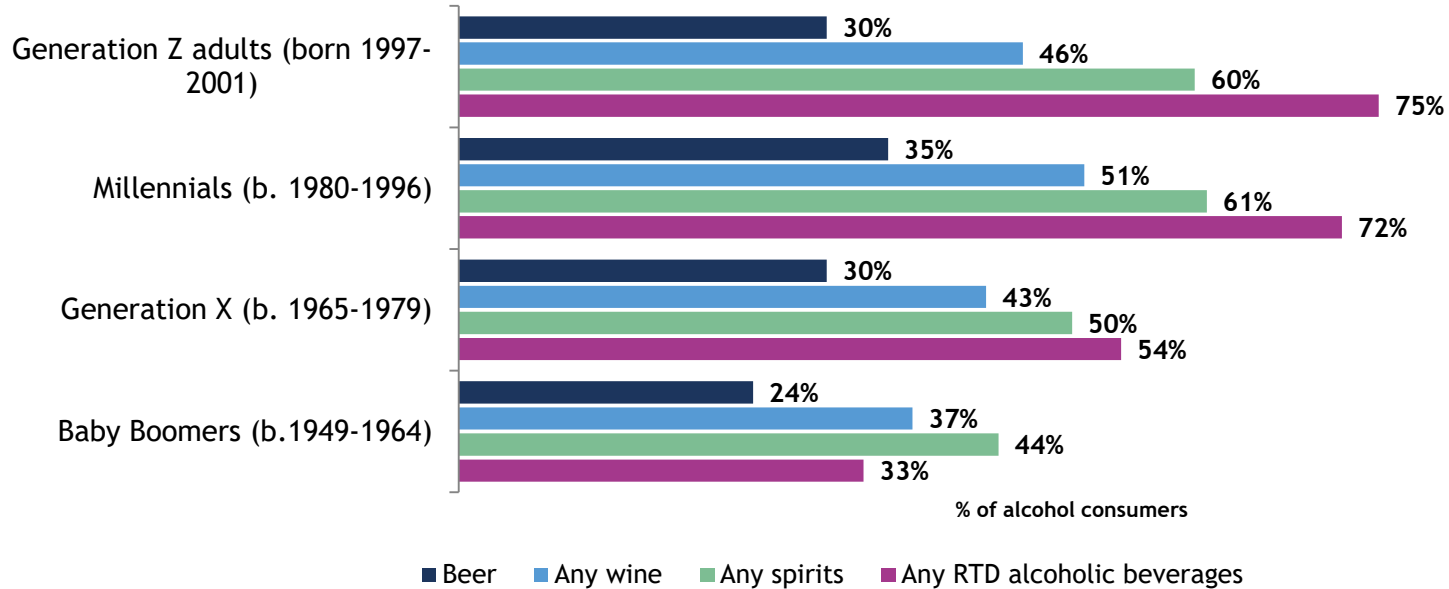
Base: US: 2,000 internet users aged 22+, * US: 1,556 internet users aged 22+ who drink any alcoholic beverages, September 2023

Source: Kantar Profiles/Mintel ([Beer](#), [other alcohol](#)) from Mintel's Trending Flavors and Ingredients in Alcoholic Beverages - US - 2023 Report

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Target alcohol consumers aged 22-58 who prize variety

US: alcoholic beverages also consumed, by generation, 2023



World War II/Swing Generation (born 1945 or earlier) are not included due to small sample size; RTDs include flavored malt-beverages, wine-based drinks, and alcoholic tea, soda and seltzer

Base: US: 1,498 internet users aged 22-77 who drink any alcoholic beverages, September 2023

Source: Kantar Profiles/Mintel ([Beer](#), [other alcohol](#)) from Mintel's Trending Flavors and Ingredients in Alcoholic Beverages - US - 2023 Report

Cider has opportunities across generations in North America

GENERATION Z

Grow

cider's connection with
Generation Z adults.

In 2022, 22% of Canadian Gen Zs
drank cider and 17% of US Gen
Zs drank cider.

MILLENNIALS

Maintain

cider's appeal with Millennials.

In 2022, 28% of Canadian
Millennials and 27% of US
Millennials drank cider.

GENERATION X

Retain

Generation X drinkers who
choose cider.

In 2022, 22% of Canadian Gen
Xers and 15% of US Gen Xers
drank cider.

Base: Canada: 178 internet users aged 20-26 (Generation Z), 566 internet users aged 27-43 (Millennials), 514 internet users aged 44-58 (Gen X), [December 2022](#); US: 103 internet users aged 22-26 (Gen Z), 689 internet users aged 27-43 (Millennials), 473 internet users aged 44-58 (Gen X), [September 2022](#)

Source: Kantar Profiles/Mintel from Mintel Reports: The Spirits Consumer - Canada - 2023 and Trending Flavors and Ingredients in Alcoholic Beverages - US - 2022

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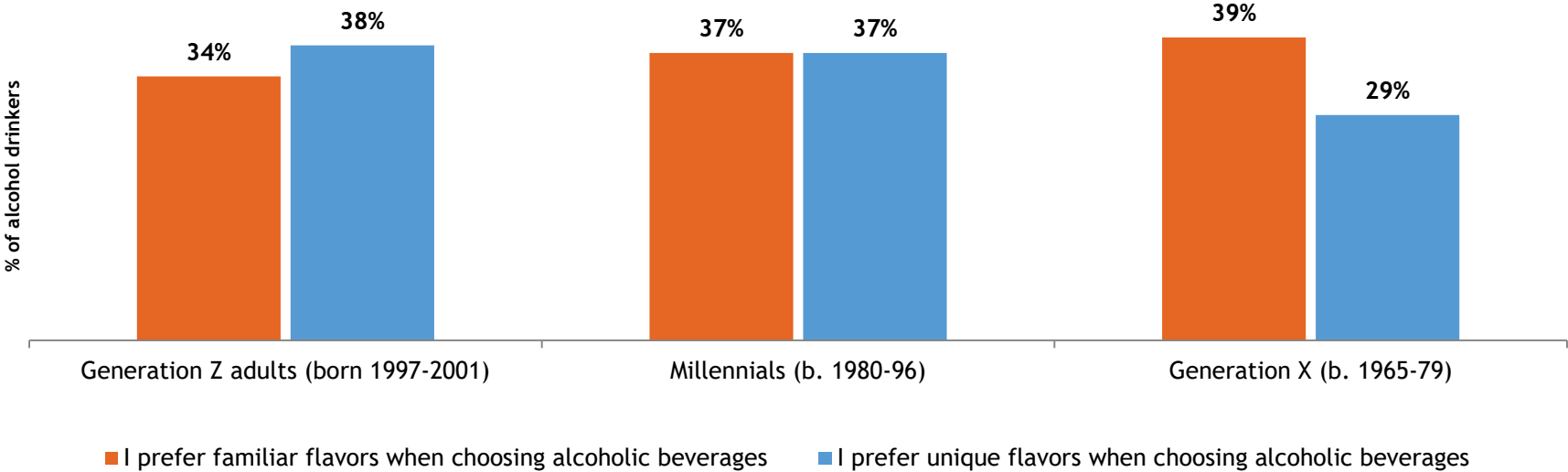
Need to have #1:
appealing flavors



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US alcohol consumers are split between familiar and unique flavors

US: select flavored alcoholic beverage attitudes and behaviors - preference for familiar or unique, by select generations, 2023



Base: US: 1,498 internet users aged 22-58 who drink any alcoholic beverage, September 2023

Source: [Kantar Profiles/Mintel](#) from Mintel's Trending Flavors and Ingredients in Alcoholic Beverages - US - 2023 Report



Combine familiar flavors in new ways



Cherry Crisp

[One Barrel Brewing Granny's Cherry Crisp Hard Cider](#) (5.5% ABV) is all-natural and gluten-free (US).



Guava Lemonade

[Schilling Cider Big Zesty Guava Lemonade Cider](#) (6.9% ABV) is a combination of apple cider, guava puree and natural flavors (US).



Ruby Red Grapefruit and Rosemary

[2 Towns Ciderhouse Ruby Revelry Grapefruit Rosemary Cider](#) (5% ABV) is a blend of apple and grapefruit with "sophisticated" rosemary notes (US).

Use natural ingredients that add more than just flavor

33%

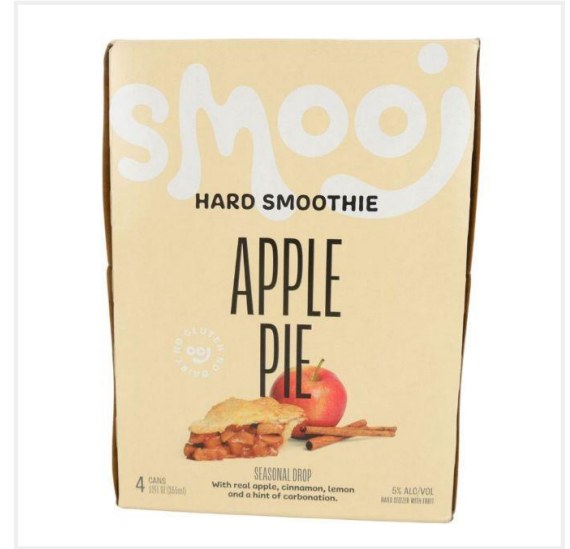
of US alcohol consumers like flavors or ingredients that add color to their drink, rising to 46% of Millennials.

28%

of US alcohol consumers like flavors or ingredients that add texture to their drink, rising to 38% of Millennials and 34% of Gen Z adults.



[Cowbell Cider Rosé Aged on Hibiscus Flavored Cider](#) (5% ABV, Canada)



[Smooj Apple Pie Hard Smoothie](#) with fruit puree & cream of coconut (5% ABV, US)

Base: US: 1,566 internet users aged 22+ who drink any alcoholic beverages, September 2023

Source: [Kantar Profiles/Mintel](#) from Mintel's Trending Flavors and Ingredients in Alcoholic Beverages - US - 2023 Report, Mintel GNPD

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Attract 'unique' drink seekers with 'surprising' flavors

46%

of US alcohol drinkers would consider an alcoholic beverage "unique" if it had a surprising flavor combination.

Base: US: 778 internet users aged 22+ who drink any alcoholic beverages, September 2023

Source: [Kantar Profiles/Mintel](#) from Mintel's Trending Flavors and Ingredients in Alcoholic Beverages - US - 2023 Report

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Appeal to 'unique' drinkers with unexpected flavor duos



Peach and Apricot

[Rabaska Peach Apricot Carbonated Crackling Cider Cocktail](#) (5.6% ABV) is locally made in Quebec with hand-picked apples and natural flavor of peach and apricot (Canada).



Blackberry and Cinnamon

[Kopparberg Spiced Blackberry Premium Cider](#) (4% ABV) is apple cider with "a taste of blackberry and a touch of warming cinnamon." It can be served hot or cold (UK).



Cider and Chili

[Savanna Chilled Chilli Premium Cider](#) (5.5% ABV) blends the crisp, dry taste of cider with [hints of chili and ginger](#). The brand partnered with restaurant chain Nando's to create the spicy flavor (South Africa).

Top global cider markets see dessert flavor innovations

FlavourScape AI highlights dessert flavors among the Emerging or Novel flavors of cider launches in top 10 global cider launch markets.*

Dessert flavors to watch include: Whipped Cream, Marshmallow, Sherbet, Tutti Frutti, Custard, Caramel, Gingerbread and Apple Strudel, Crumble or Streusel.



[Brothers Toffee Apple English Cider](#) was [a bestseller in the UK](#) (4% ABV, UK)



[Ernest Snickerdoodle Cider](#) is made with brown sugar & vanilla (5% ABV, Canada)

* Top 10 cider markets include UK, France, Norway, Australia, Finland, Latvia, Canada, Sweden, Germany and US

Need to have #2:
cocktail inspiration
and integration



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Enhance convenience with cocktail-flavored ciders

43%

of Canadian RTD buyers drank RTDs because RTDs allow them to enjoy mixed drinks without having to purchase multiple ingredients or beverages.



[Shacksbury](#) Lo-Ball Cider has a highball-inspired whiskey and citrus flavor (4.5% ABV, US)

Base: Canada: 1,090 internet users aged 20+ who drank any premixed/RTD alcoholic beverages in the 12 months to July 2022

Source: Kantar Profiles/Mintel from Mintel's Report [RTD Alcoholic Beverages - Canada - 2022](#)

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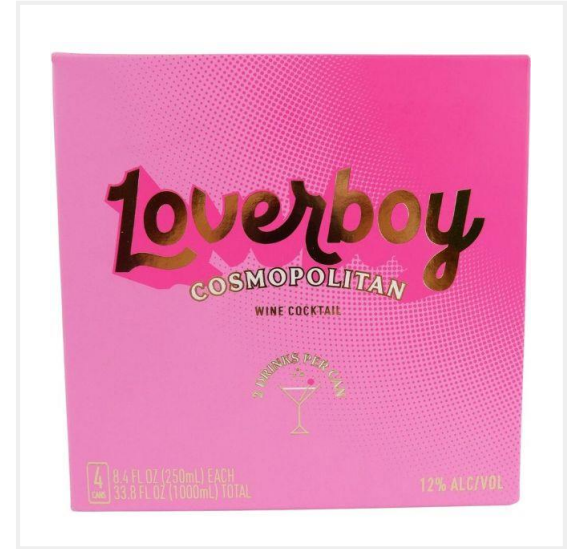
Take inspiration from the cocktail flavors trending in RTDs

Cider brands follow the new cocktail flavors appearing in RTDs, which Mintel's FlavourScape AI identifies as:

- Emerging RTD flavors Moscow Mule and Cosmo
- Novel flavors Mai Tai and Mimosa.



[Bishop Cider Texas Más-mosa](#) with Texas oranges and bubbly fruit (6.9% ABV, US)



[Loverboy Cosmopolitan Wine Cocktail](#) made with real fruit juices (12% ABV, US)

North Americans have embraced the creativity of cocktail-making

60%

of US alcohol consumers enjoy making cocktails at home, rising to 72% of Gen Zs and 72% of Millennials.

53%

of Canadian alcohol consumers enjoy making cocktails when they entertain, rising to 66% of Gen Zs and 64% of Millennials.

34%

of US spirit consumers experiment with new cocktail recipes, rising to 43% of Gen Zs and 43% of Gen X spirits drinkers.

Base: US: 1,717 internet users aged 22+ who drink alcohol, August 2023; Canada: 1,649 internet users aged 20+ who consumed alcohol in the year to December 2022; US: 1,043 internet users aged 22+ who drink dark or white spirits, August 2023

Source: Kantar Profiles/Mintel from Mintel Reports: [Dark Spirits - US - 2023](#); [The Spirits Consumer - Canada - 2023](#); [Dark Spirits - US - 2023](#)

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Promote cider as a cocktail ingredient

29%

of US alcohol drinkers would be motivated to buy a RTD cocktail if it was made with real juice, rising to 37% of Gen Z drinkers.

42%

of US wine-drinkers agree sparkling wine makes a good cocktail ingredient. 48% of Millennial and 47% of Gen Z wine-drinkers agree.

52%

of US alcohol consumers would be interested in recipes to use RTDs in cocktails, rising to 68% of Gen Z and 68% of Millennials.

Base: US: 1,717 internet users aged 22+ who drink alcohol, August 2023; US: 1,117 internet users aged 22+ who drink wine, August 2023; US: 1,556 internet users aged 22+ who drink any alcoholic beverages, September 2023

Source: Kantar Profiles/Mintel from Mintel's Reports: [Dark Spirits - US - 2023](#); Wine - US - 2023; RTD Alcoholic Beverages - US - 2023

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Apple cider features in autumnal cocktails on social media



Instagram recipe for Apple Cider Margaritas from [@maryswholelife](#)



Instagram recipe for Spiced Apple Cider Spritz from [@ourbalancedbowl](#)

Cider aligns perfectly with interest in seasonal cocktails

70%

of US Millennials and 64% of Gen Zs who drink alcohol away from home are interested in cocktails with seasonal flavors (eg cinnamon, eggnog).

Base: US: 594 internet users aged 27-43 (Millennials) and 121 internet users aged 22-26 (Gen Z) who drink alcoholic beverages away from home, September 2023

Source: KantarProfiles/Mintel from Mintel's Foodservice Alcohol Trends - US - 2023 Report

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Nice to have: better-for you options

Alcohol with better-for-you (BFY) formulations offer alternatives for the growing segment of health-conscious drinkers.

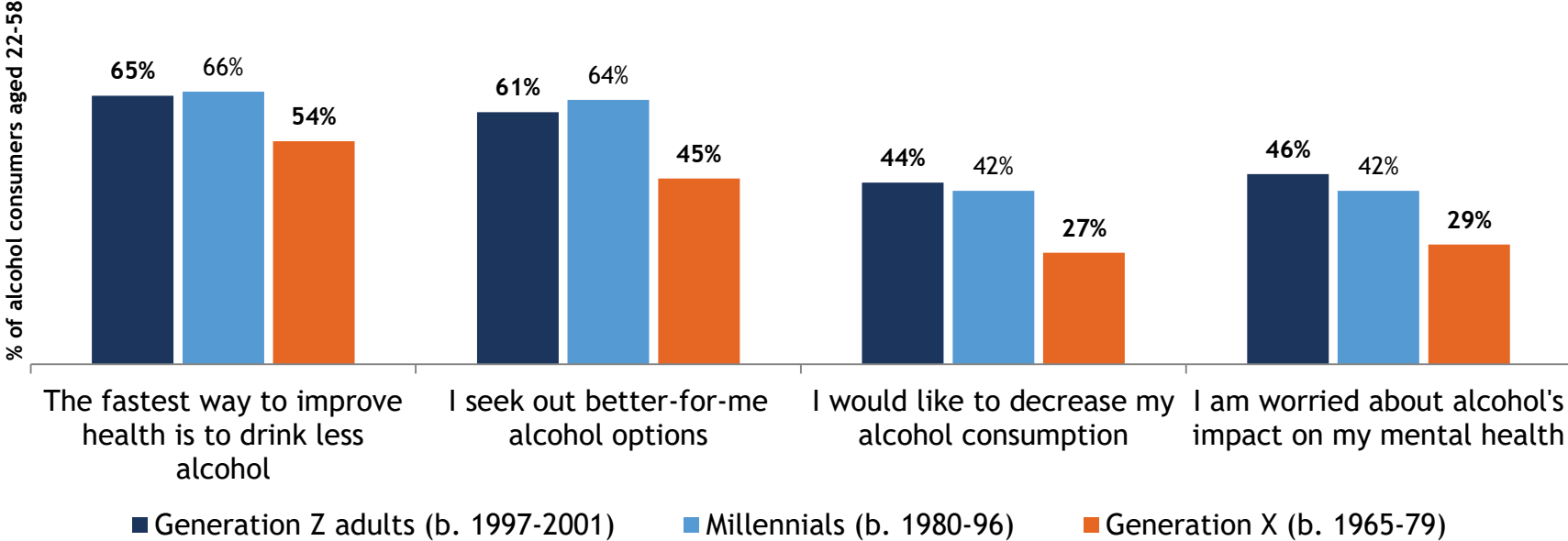
Cider brands can consider the following nice-to-have recommendations:

- Less sugar
- Low and no alcohol
- "No"-stalgia, or leveraging the appeal of nostalgia to draw people to non-alcoholic ciders



Be mindful of the health and wellness concerns of ages 22-58

US: select alcohol attitudes - alcohol and health, by select generations, 2023



Base: US: 1,188 internet users aged 22-58 who drink alcohol, August 2023

Source: Kantar Profiles/Mintel from Mintel's Report [Beer - US - 2023](#)



Nice to have #1:
less sugar



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Key generations are more likely to be on the lookout for low-sugar claims than all drinkers

GENERATION Z

29%

of US Gen Z out-of-home drinkers would be interested in ordering low sugar/calorie cocktails vs. 23% of all out-of-home drinkers.

MILLENNIALS

33%

of US Millennial wine-drinkers would drink more wine if there were more BFY (eg low sugar) wines vs. 23% of wine-drinkers overall.

GENERATION X

31%

of US Gen X spirits drinkers are interested in no/low sugar claims in spirits vs. 26% of all spirits drinkers.

Base: US: 1,483 internet users aged 22+ who drink alcoholic beverages away from home, September 2023; US: 1,117 internet users aged 22+ who drink wine, August 2023; US: 1,043 internet users aged 22+ who drink dark or white spirits

Source: Kantar Profiles/Mintel from Mintel's Reports: Foodservice Alcohol Trends - US - 2023; Wine - US - 2023; White Spirits - US - 2023

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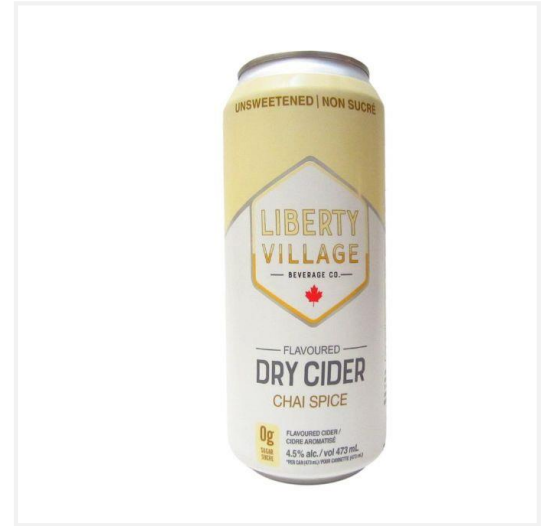
FlavourScape AI suggests growing less sweet flavors



Emerging flavor: Kiwi
[Cocky Crane Frizzy Kiwi Kiss Premium Swedish Cider](#) (4% ABV) is a kiwi and lime flavored apple cider (Germany).



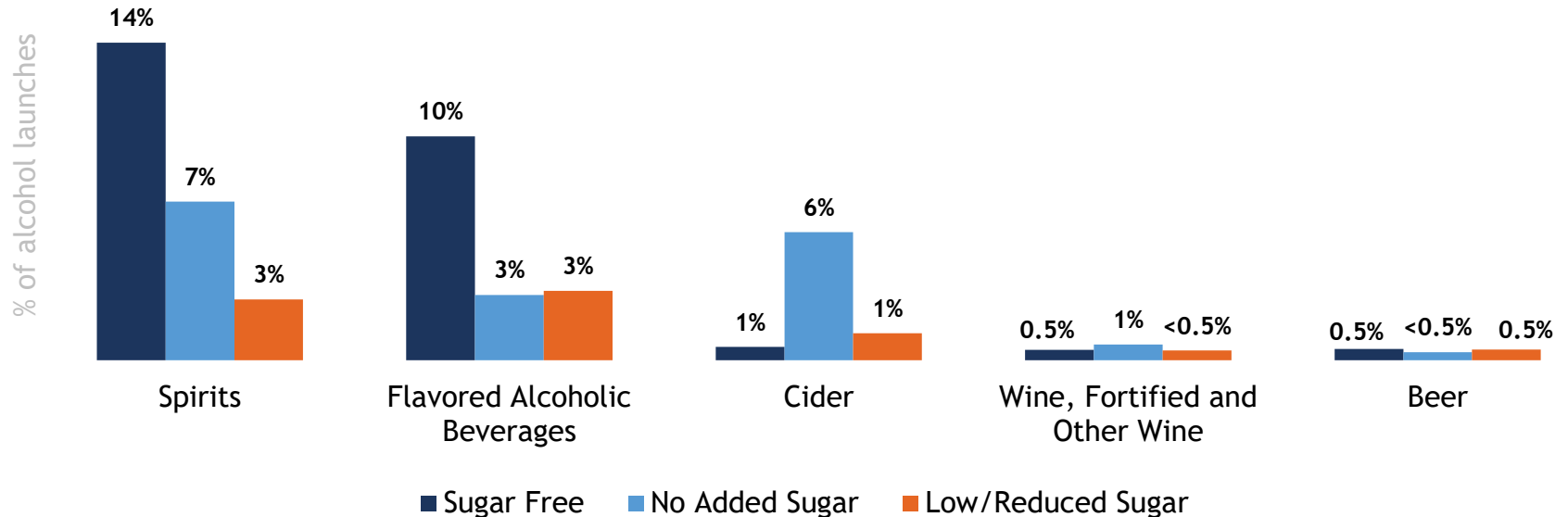
Emerging flavor: Basil
[Fils de Pomme Yuzu & Basil Infused Cider](#) (5% ABV) is said to be a fusion of sweet apple and citrusy yuzu "elevated" by basil (France).



Novel flavor: Chai spice
[Liberty Village Chai Spice Flavored Dry Cider](#) (4.5% ABV) is an unsweetened drink made with Ontario apples and chai spice tea (Canada).

Spirits and RTDs are setting expectations for sugar-free formulations

Global: low/no/reduced sugar claims in alcohol launches, by category, 2019-23



International cider brands tout no added sugar and lower sugar



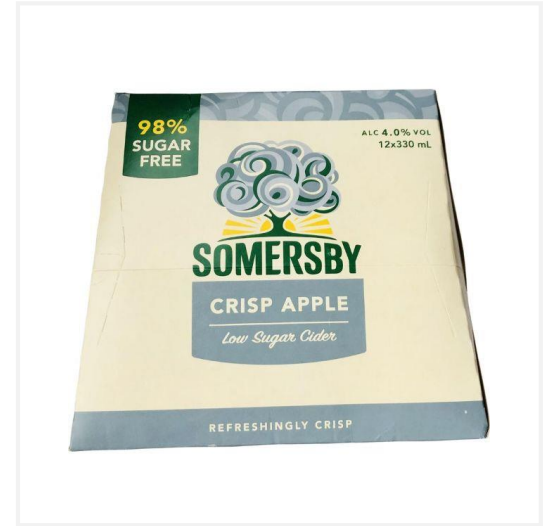
No Added Sugar

[Hoggy's Dry Apple Cider](#) (4.5% ABV) has a front-of-pack claim that the cider has no sugar added. The drink is made with apple wine and 20% apple juice (Estonia).



Lower sugar

[Scape Goat Lower Sugar Apple Cider](#) (4.5% ABV) is 40% lower in sugar than the brand's regular apple cider. A 330ml bottle of the cider has 12.5g sugar (New Zealand).



98% Sugar Free

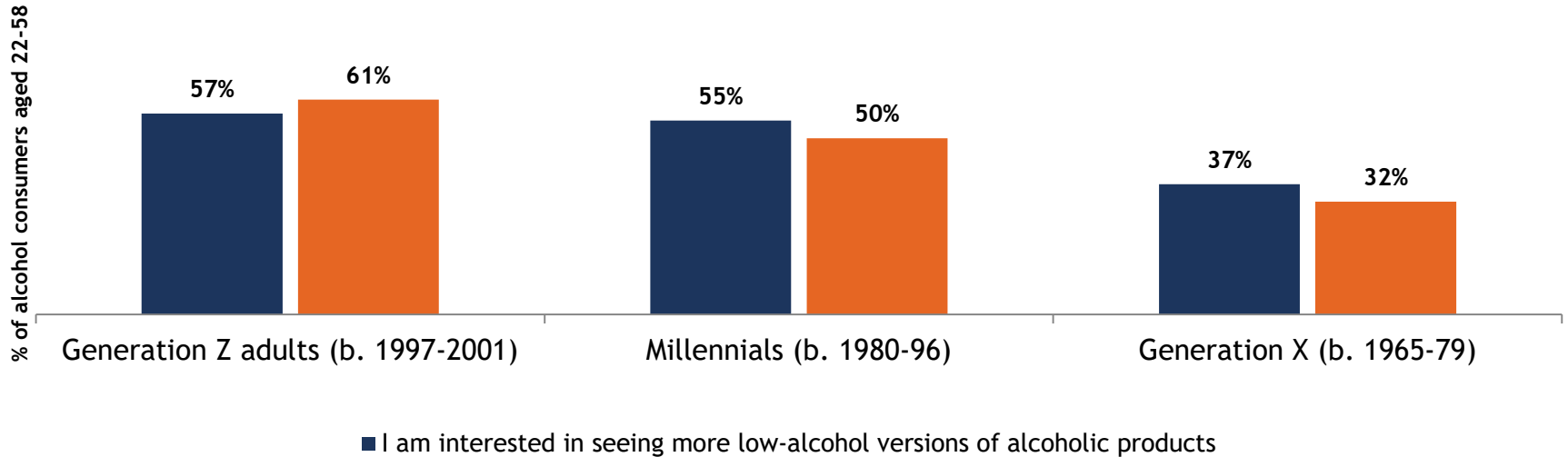
[Somersby Crisp Apple Low Sugar Cider](#) (4% ABV) claims to be 98% sugar free. The cider is made with a blend of tart and sweet apples. A 330ml bottle has 6.6g sugar (New Zealand).

Nice to have #2:
low and no alcohol



Gen Z and Millennials are key targets for moderate substitutes

US: select alcohol attitudes - low and no alcohol options, by select generations, 2023



Base: US: 1,188 internet users aged 22-58 who drink alcohol, August 2023

Source: Kantar Profiles/Mintel from Mintel's Report [Beer - US - 2023](#)

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International launches lead the way for low ABV ciders



0.5% ABV British cider

[Stowford Press Low Alcohol Apple Cider](#) (0.5% ABV) is said to be "an award-winning cider with a crisp apple taste with subtle notes of honey and a deliciously refreshing finish" (UK).



2% ABV Japanese cider

[Nikka Hirosaki Sparkling Tsugaru Apple Cider](#) (2% ABV) is a fresh, carbonated cider with mild sweetness and acidity. It is made with Tsugaru apples harvested in 2023 (Japan).

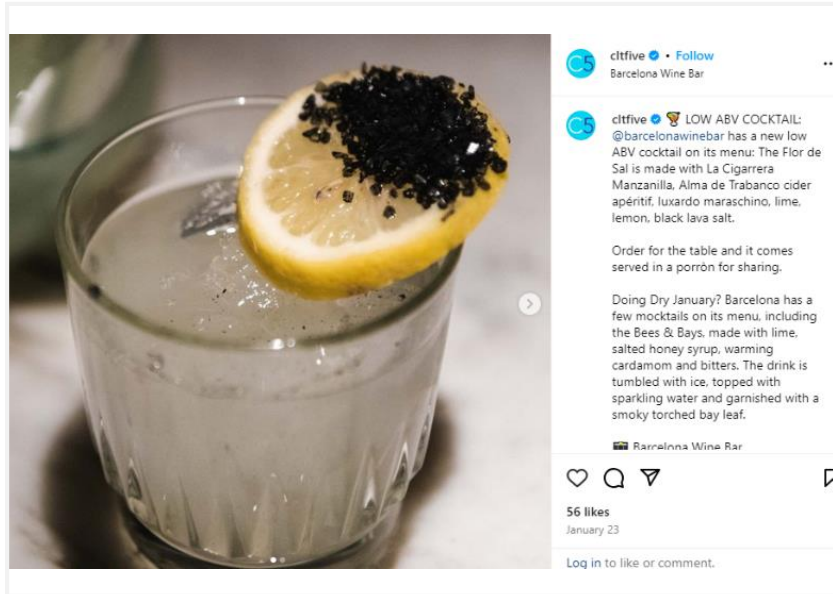


2% ABV French perry

[Sélection Auchan Vergers du Patrimoine Fruity Pear Drink](#) (2% ABV) is a private label drink made with French pears from Normandy (Ivory Coast).

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Apple appears in low ABV cocktails on social media



[@ctifive](#) posted about Barcelona Wine Bar's low ABV cocktail with apple sherry and cider aperitif



Instagram recipe from [@bestcocktails](#) for a low ABV cocktail made with Granny Smith apple juice

Use complex flavors to make no-alcohol ciders more interesting



[Briska Demi-Sec Apple Cider with Taste of Sauvignon Blanc & Green Apples](#) (0.5% ABV, Sweden)



[Grevens Alcohol Free Cider with Lemongrass, Black Tea & Hibiscus Flavor](#) (0.5% ABV, Norway)

57%

of Canadian alcohol consumers agree **mocktails are a good substitute for cocktails**. Agreement rises to 65% of Canadian Gen Zs and 62% of Millennial drinkers.

Base: Canada: 1,499 internet users aged 20+ who drink alcoholic beverages, July 2022

Source: Kantar Profiles/Mintel from Mintel's Report [RTD Alcoholic Beverages - Canada - 2022](#), Mintel GNPD

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Nice to have #3:
"no"-stalgia





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Tap into nostalgia for when childhood celebrations marked with sparkling cider




 martinellisco • Follow ...


 martinellisco POV: You may be just a kid, but you feel the holiday hype and you want to celebrate like a grown-up. You ask for some sparkling cider, and your plastic flute almost looks like the real thing. You take a sip – not spilling a drop on your party khakis – and get that bubbly, festive feeling all over. You try to lift your pinky, but it's not happening. Maybe next year. 🥂

 #MartinellisMoment, holiday edition, courtesy of @princecharlesluther!


Edited · 2w

 luckygrapeconsulting 🥂 Party khakis ♡

4d 1 like Reply See translation


 laura.r.ponder Literally just brought me back to my childhood. 🥂 Also don't drink alcohol anymore so Martinellis for every celebration! 🥂🥂 ♡

2w 2 likes Reply

 healthytea 🥂🥂🥂my Son! Cheers 🥂 he said! 🥂 ♡

2w 1 like Reply

— View replies (1)

 itslesleyc Cheers baby!!!! 🥂🥂 ♡

2w 1 like Reply

Encourage adults to have fun with non-alcoholic cider



A take on viral 2023 fad "Girl Dinner" in an Instagram post from [@naturally_neen](#)



[Pernod Ricard UK](#) released Greasy Fingers, a wine crafted to pair with gourmet fast food

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Reach out to juice consumers

29%

of US adults aged 25-64 who bought juice or juice drinks **consumed more juice to treat themselves** in the last six months.

23%

of US adults aged 25-64 who bought juice or juice drinks **incorporated more types of juice** into their routines in the last six months.

21%

of US adults aged 22+ who purchased select juice or juice drinks **consumed more juice in place of alcohol** in the last six months.

Base: 944 internet users aged 25-64 who purchased select juice or juice drinks in the three months to February 2023

Source: Kantar Profiles/Mintel from Mintel's [Juice and Juice Drinks - US - 2023](#) Report

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Key takeaways

Put flavor first

With adults drinking so many different types of alcoholic beverages, ciders need to stay relevant to variety-seeking drinkers by offering a range of familiar and unique flavors.

Mix into the cocktail trend

Adults are drinking cocktails as a way to experiment with flavors both in- and out- of the home. Promote cider as a versatile ingredient in cocktails, including low alcohol cocktails.

Offer better-for-you ciders

Generation Z and Millennial drinkers are concerned about alcohol's impact on their health. Brands can stay relevant to these cautious drinkers with less sweet, low alcohol and non-alcoholic formulations.

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Experts in what consumers want and why

Thank you! Questions? Comments?



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