

White Spirits and RTDs – UK – March 2021

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This report looks at the following areas:

- The impact of COVID-19 on the white spirits and RTDs category and the outlook for the category.
- Launch activity in 2020 and future product development opportunities.
- Changes in purchase patterns and channels.
- Consumer views of white spirits' health credentials and qualities, including associations with particular occasions.

Demonstrating how the closure of the hospitality sector in response to the COVID-19 outbreak has spurred people to seek to replicate the pub/bar experience at home, 38% of white spirits/RTDs drinkers/buyers report to have started making or to be making more homemade cocktails since the outbreak. Similarly, as a result of the on-trade closures coupled with the hot summer, 60% of white spirits/RTDs users/buyers bought pre-mixed alcoholic drinks to drink when socialising outdoors in the six months to October 2020.

The COVID-19 outbreak brought about a sharp shift in drinking occasions to in-home, driving strong growth in retail volume sales, which nudged the overall white spirits and RTDs category into modest volume growth in 2020. However, this shift to the lower priced off-trade meant that value sales plunged dramatically. With the hospitality sector set to be closed for most of the first half of 2021 as a result of the lockdowns that began in January, this will slow the recovery of on-trade sales while continuing to buoy up retail sales.

The alcohol moderation trend, given extra momentum by the COVID-19 outbreak, poses a challenge to the market. However, it also allows scope for further NPD in lower-calorie, low-/non-alcoholic versions. The wider health trend that this is related to will fuel opportunities for lower sugar RTDs.

Offering cocktail recipe suggestions would allow companies to tap into the home cocktail making trend, with cocktail-making kits another promising avenue for companies to explore on this front. White spirits with historical



“The COVID-19 outbreak boosted retail sales of white spirits and RTDs in 2020 but is likely to erode sales longer term by accelerating the alcohol moderation trend. Further NPD in lower calorie, low/non- alcoholic spirits alternatives would help companies to better appeal to the health-conscious.”

– Alice Baker, Research Analyst

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recipes can also help companies to respond to the homemade cocktails trend through promoting recipes recreating mixed drinks/cocktails from the era the spirits' recipes are based on. These variants' particular appeal to over-35s, meaning they can also help companies to retain users in the category for longer.



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- **Opportunities for cocktail delivery services remain even once venues re-open**
- **Need to educate consumers on white spirits' zero-sugar status**
- **A quarter of adults see non-alcoholic versions of white spirits as more interesting than standard soft drinks**
- **Focus on celebrating everyday achievements to drive usage frequency**
- **Use in-store promotions to boost non-alcoholic spirits**

Figure 79: Display at Sainsbury's Fulham Wharf promoting its range of alcohol alternatives, 2021

QUALITIES ASSOCIATED WITH SELECTED TYPES OF WHITE SPIRITS AND RTDS

- **Gin is the most widely seen as relaxing**
Figure 80: Qualities associated with selected types of white spirits and RTDs, October 2020
- **Promote tea-based cocktails to strengthen emotional associations**
- **Focus on small-scale at-home celebrations to drive sales in 2021**
- **Few see any type of white spirit or RTDs as versatile**
- **Highlight the variety of possible serves to boost versatile image**
- **Meal pairing suggestions would help to drive usage**

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