Rethinking Packaging:

In the Pre-mixed Drinks & Cocktails Category

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1. Objective

The objective of this study is to examine and challenge prevailing assumptions within the RTD category. In particular, the research seeks to quantify consumer demand for premium glass packaging in relation to purchase intent. Evaluating whether the mainstream can format accurately reflects consumer preferences, or whether alternative formats may present untapped opportunities.

2. Methodology

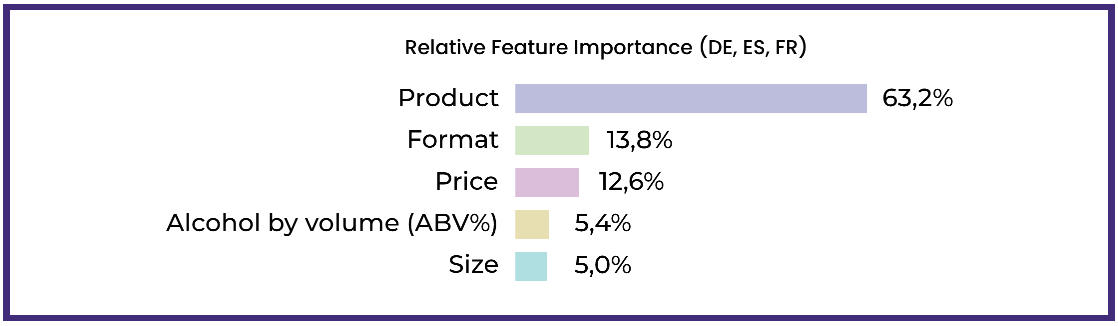
Applying conjoint methodology, we surveyed a sample of 448 respondents who were buyers of pre-mixed drinks and cocktails across three markets: Germany (n=149), Spain (n=149), and France (n=150). Respondents were asked to evaluate a series of product combinations composed of varying attributes: Brand, Price, ABV (% alcohol by volume), Pack format, and Pack size, and to select the option they preferred most in each set.

The whole process, from creating the survey until the results were ready to be analyzed in our market simulator, took only 14 days. Each respondent was presented with 10 choice cards, resulting in a total of 4,480 evaluated choice scenarios. The resulting dataset enabled the estimation of the relative importance of each attribute and the utility associated with different product configurations, allowing us to quantify consumer trade-offs between packaging format, alcohol strength, and price. These insights form the basis for identifying which combinations of attributes most strongly drive consumer preference and purchase intent within the RTD category.

3. The Premiumisation Opportunity: What Drives Consumer Value

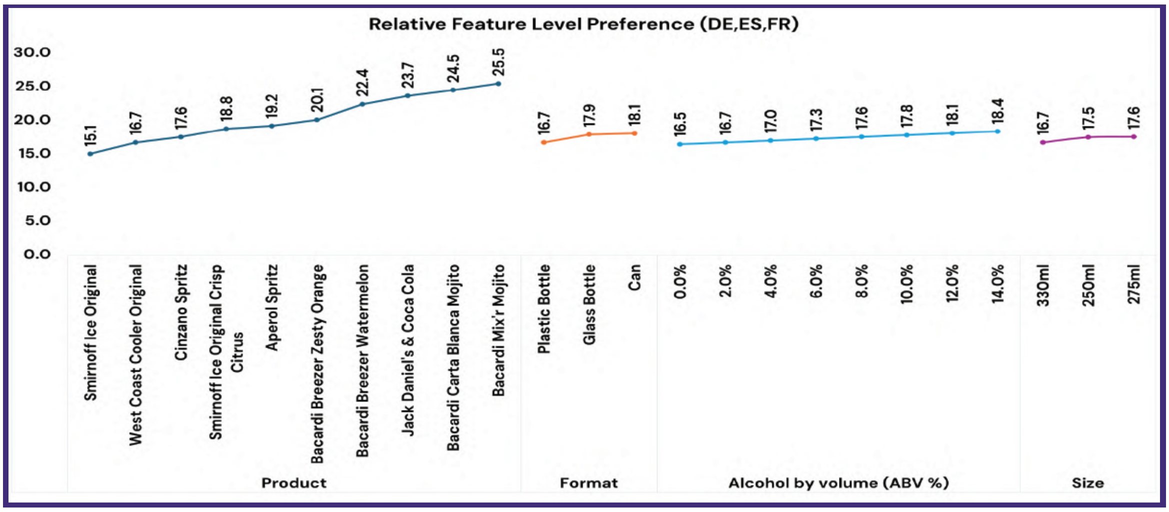
Across the three markets, analysis of the five attributes tested, namely Product, Format, Price, Alcohol by volume (ABV %), and Size, indicates that Product, Format, Price were the most influential drivers of consumer preference.

Fig 3.1: Relative Feature Preference



Product: At an aggregate level (DE, ES, FR), the *Bacardi Mix'r Mojito* product in the Can format emerged as the most preferred product combination among respondents. These attributes demonstrated the highest preference score within the tested combinations, indicating strong overall appeal in the RTD category.

Fig 3.2: Relative Feature Level Preference across 3 markets



Formats: While overall preferences show a consistent preference for Cans across, at the total market level, only French respondents show a slight preference for Glass Bottles over Cans (18.1 vs 18.0). More pronounced variations emerge when examining specific demographic groups. Among consumers aged 36–50 years, preferences for the Glass Bottle format become more defined, particularly among women. This suggests that while Cans dominate at the category level, premium Glass Bottle formats may resonate more strongly with select consumer segments, especially mid-aged (36–50 years) and younger (19–25 years) French female consumers.

Similarly, in Spain, younger males aged 19–35yrs show a preference for Glass Bottles over Cans, whereas younger females (19–25 years) display a strong preference for Cans over Glass Bottles.

Fig 3.3: Relative Feature Level Preference - Gender

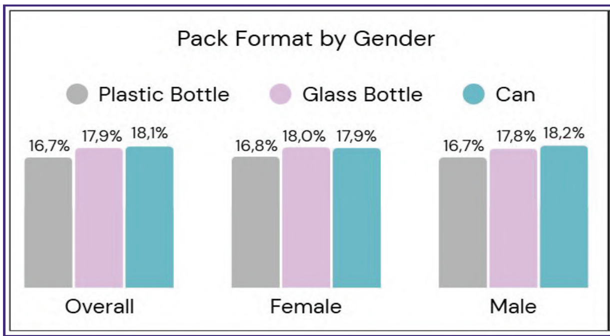
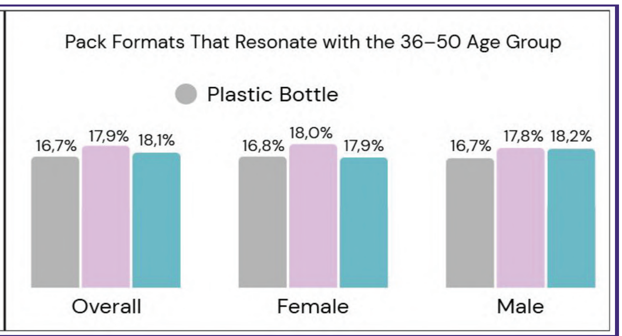


Fig 3.4: Relative Feature Level Preference - Age Group



The Subtle Pull of a Stronger Sip: ABV (%) matters, but sits behind brand, format and price in the decision hierarchy, across demographics. The results indicate a consistent consumer preference for higher ABV concentrations.

4. The Bottle Advantage

High-Affinity Segment Scenario (Females in France):
Consumer preferences for format show subtle but meaningful variation across markets and demographic groups. To better understand how these preferences translate into actual choice, we explored them further using a simulation that factors in price.

Focusing on the French female population, we examined how format preferences interact with price across key demographic groups.

When we compared the two pack formats of Bacardi Mix'r Mojito 250ml: Can vs the Glass Bottle, while keeping all other attributes constant, including price at €2.10, the Glass Bottle clearly outperformed the can among French female consumers. This initial result suggested that the bottle format carried a stronger perceived value, even without any price difference.

To quantify that perceived value, we then adjusted the price of the Glass Bottle to create a level playing field, where both formats achieved nearly equal market share. The analysis revealed that the Glass Bottle could command a 14% premium over the Can while maintaining parity in choice.

To summarise, French female consumers were willing to pay more for the premium feel of the Glass Bottle, a clear indication of the value associated with pack format, highlighting not just the preference for Glass over Can, but also the potential pricing leverage the premium format provides.This preference is particularly strong among female consumers 35–50yrs. Followed by 19–25yrs.

Fig 4.1: Volume Share – Same Price

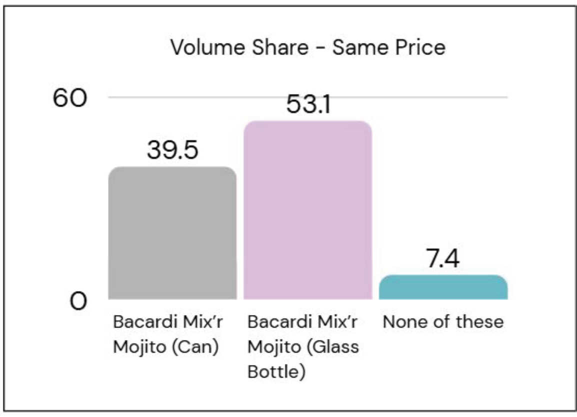
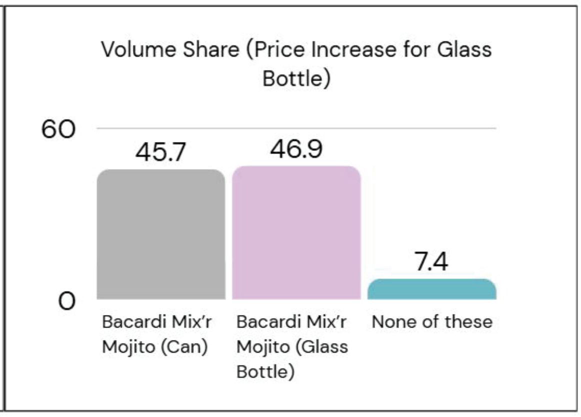


Fig 4.2: Volume Share – Can: 2.10, Bottle: 2.39



A 250ml glass variant of Bacardi Mix'r Mojito was then introduced incrementally to the fixture containing the full product set, increasing Bacardi's SKU count. This was used to assess its competitive performance and the incremental value it delivers to the category within the female group.

The transition from Cans to Glass Bottles drove structural reshaping of the portfolio, characterised by both incremental growth and targeted substitution. *Bacardi Mix'r Mojito*, introduced in a Glass Bottle format, emerged as the primary growth source for Bacardi Portfolio securing a stronger share position (13.6%), and highlighting that glass format can successfully unlock new demand and premium consumption occasions within the female group.

This growth is partially reflecting a reallocation from sharp decline in Bacardi Mix'r Mojito's legacy 250ml Can format (7%, -8.6pts), indicating a clear consumer shift from Cans towards more premium packaging, particularly in smaller, ready to consume formats.

Beyond the Segment: Cans Remain Core, Segment-Led Premiumisation with Glass Formats

While glass shows strong premiumisation potential within key segments, this does not scale across the total market. Its role is therefore not to replace Cans, but to unlock incremental growth among targeted groups (eg. French Females).

At the total market level, Cans remain the primary volume driver and cannot be replaced. Despite the introduction of the Bacardi Mix'r Mojito 250ml Glass Bottle variant, Cans continued to outperform glass and retain a top three position, even with some share decline (-4.7 pts). Performance is more resilient with the 275ml glass variant (-2.7 pts), suggesting the strength and stability of cans in maintaining category scale.

Glass, however, delivers incremental value to the Bacardi portfolio (+1.3 pts.) without displacing Cans, highlighting its role as a complementary growth lever. This suggests to a segmented opportunity.

The route to growth -Expand the range rather than replacing it: *A dual format strategy with Glass Bottles recruiting higher-value consumers and driving premiumisation, while Cans continue to anchor mainstream demand and deliver scale.*

The Stronger Sip Advantage: Unlocking the Power of Alcohol Content

When assessing the impact of alcohol content on product performance in the French market, we tested through a controlled comparison between the Bacardi Mojito Mix'r 0% 250ml Can and its 4% ABV variant. Pricing was adjusted to ensure a level playing field and achieve a like-for-like evaluation of respondent preference. Both variants achieved near parity in share. However, the higher ABV variant commanded a stronger price premium vs the non-alcoholic option.

A consistent pattern was observed within the Bacardi Carta Blanca Mojito 250ml can range, where the 5.0% ABV variant outperformed the 3.5% variant in terms of price premium, indicating the role of higher alcohol content in driving perceived value.

Snapshot: Other Markets Snapshot

SPAIN:

While French women (36-50yrs, 19-20 yrs) preferred Glass Bottles over can, the Spanish men (19-35yrs) preferred Glass Bottles over Cans. To estimate willingness to pay among Spanish male consumers for Jack Daniel's can versus glass formats, we adjusted the price of the Glass Bottle to achieve parity in choice. The results show that the glass format can command a 52% premium while maintaining equal market share. This indicates a strong willingness to pay for the premium feel of glass, suggesting format preference and the impact of packaging on perceived value. The Glass Bottle format wins in both the scenarios: Segment Lead as well as total Market.

GERMANY:

At the total market level, Cans hold a slight edge over Glass Bottles in relative preference (pref. score: 18.4 vs. 18.0). However, across all demographic splits, the 36–50yrs age group stands out as the only segment that reverses the overall trend, actively preferring Glass Bottles over Cans.. This holds true for both males (pref. score: 17.7 vs. 16.9) and females (pref. score: 18.2 vs. 18.0) within the cohort, suggesting that glass carries a perceived quality or 'premium' association that resonates specifically with mid-life consumers.

To quantify this, willingness to pay was modelled for Jack Daniel's formats among the German 36–50yrs demographic. In a head-to-head comparison, the Glass Bottle variant commanded a 46% format premium before reaching a point of consumer indifference.

Overall, the **total market prefers Cans** but Glass Bottle remains the clear winner in middle age brackets.

5. Conclusion

Glass Bottles or Cans? Don't Choose, Leverage Both for Maximum Growth

- Consumer **preference between glass and can formats varies** by market, demographic segment, and brand
- **Pack format is not the sole driver of consumer choice**. Preferences are shaped by the interaction of brand, format, and price
- While Glass Bottles show strong premiumisation potential in key segments **these do not always translate to total market outcomes**
- At the total market level, **Cans continue to drive mainstream and convenience-led consumption**, even in markets where glass is highly valued

For brands, the opportunity is clear - growth will come from expanding the range rather than replacing formats, which is:

- Adding new SKUs and formats to **capture incremental shoppers**
- Leveraging **glass for premiumisation**, entry into high value occasions and targeted recruitment
- Maintaining **Cans to sustain mainstream demand**
- Exploring **ABV and pack size optimisation** to maximise category potential

By taking a dual-format, segment-led approach, brands can grow both their reach and overall category consumption, turning insights from consumer preferences into actionable strategies for market expansion.