

BESPOKE SURVEYS

CPGs, Energy Drinks, and Hard Seltzer Vol 15

1,250+ US Consumers, Balanced to Census

CHECK BREAKDOWN:**TREND CHECKS****CPG TRENDS**

- Consumers shifted CPG shopping toward online during the pandemic. The balance has shifted a bit back toward in-stores sequentially, but online still holds a greater share of shopping relative to pre-pandemic levels.
- Respondents believe they will keep higher than normal inventory levels of groceries and personal care items – these trends have been steady in the last few quarters.
- Price has become more important to respondents in the past few quarters as a decision-making factor around CPG purchasing.

ENERGY DRINK TRENDS

- Red Bull and Monster have the highest unaided awareness in our trackers, but brands like Celsius and Burn get the strongest NPS/favorability scores from its users relative to peers.
- Grocery stores and convenience stores are the two biggest channels for energy drinks sales and consumers care most about taste, price, and caffeine amount when buying.

HARD SELTZER TRENDS

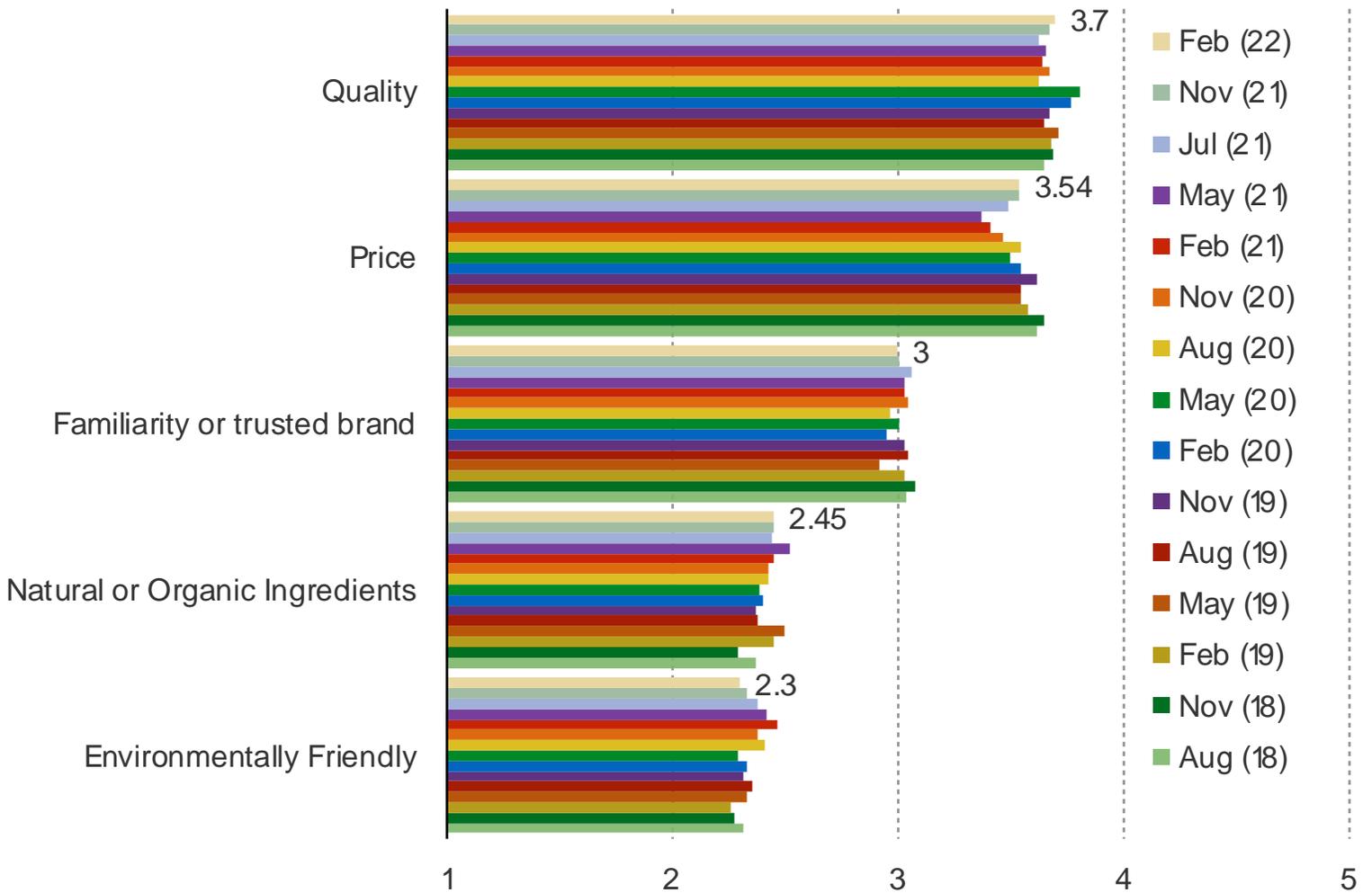
White Claw continues to have a high level of aided and unaided awareness. However, White Claw's NPS comes in lower relative to competitors. Overall, consumers have a positive opinion on hard seltzer products (with readings for Truly and White Claw roughly in line with one another).

Davids vs. Goliaths

CPGS OVERALL

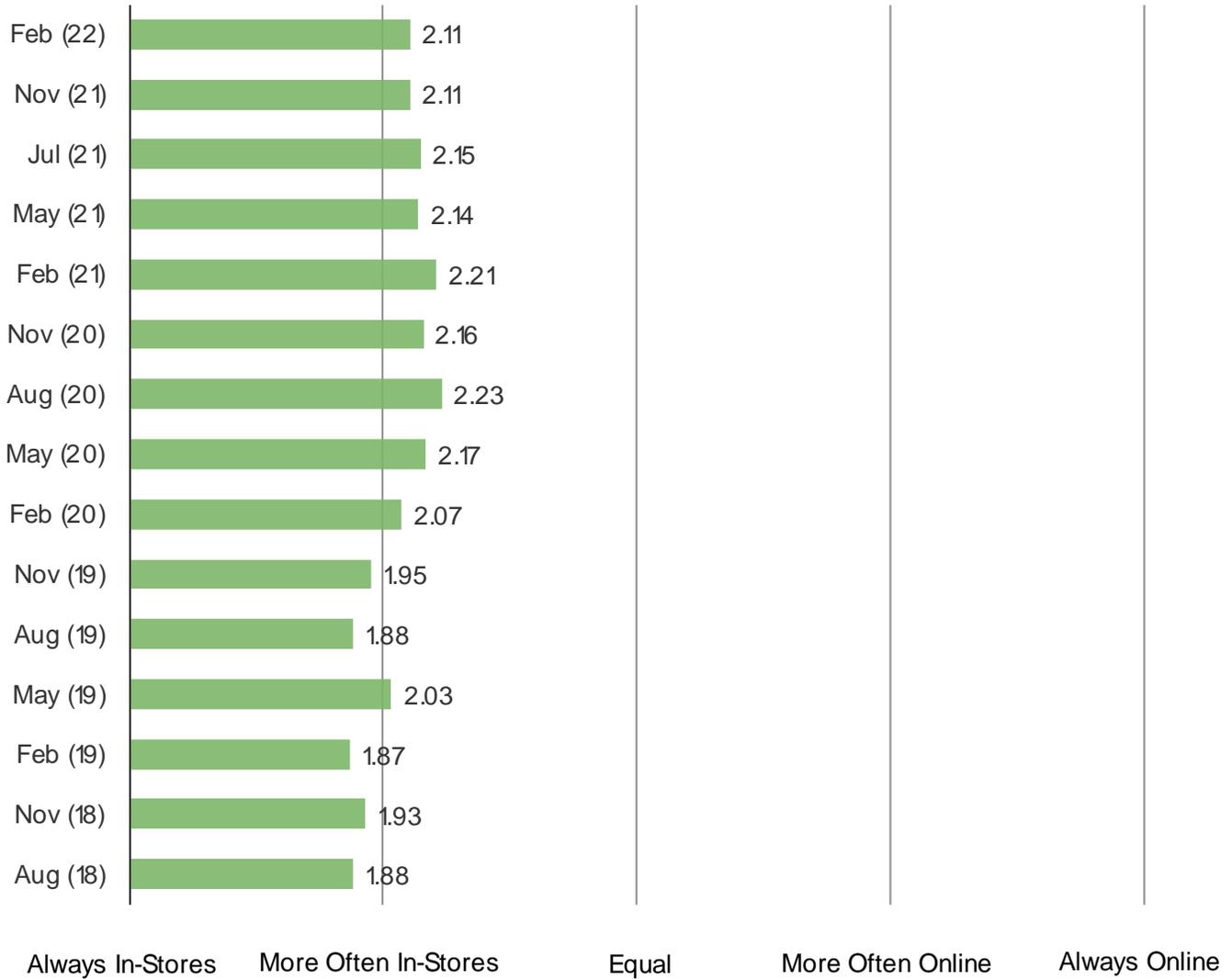
PLEASE RANK WHICH ARE MOST IMPORTANT TO YOU WHEN IT COMES TO PURCHASING PERSONAL CARE AND HOUSEHOLD ITEMS.

Posed to all respondents



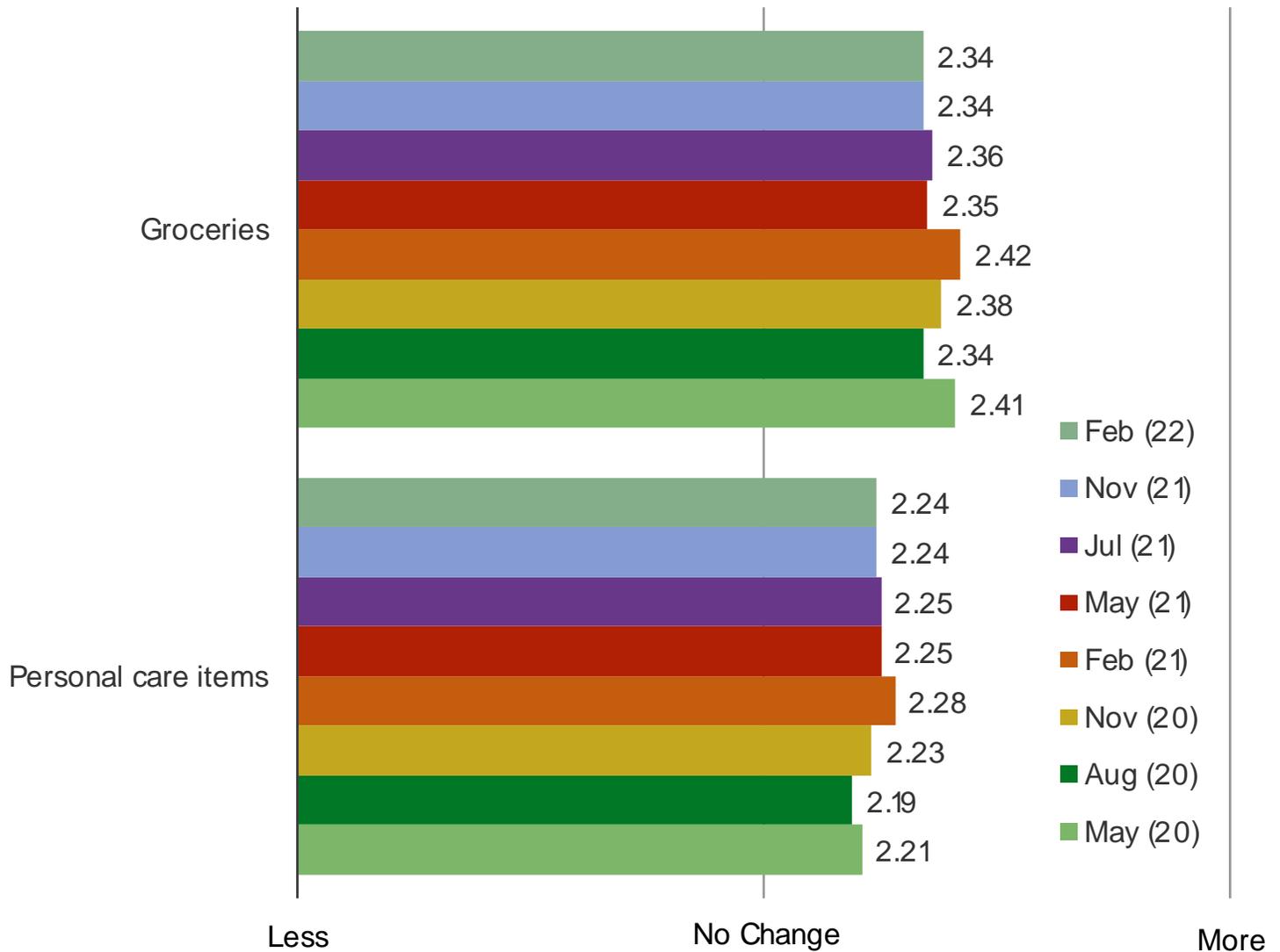
WHERE DO YOU BUY HOUSEHOLD AND PERSONAL CARE ITEMS?

Posed to all respondents



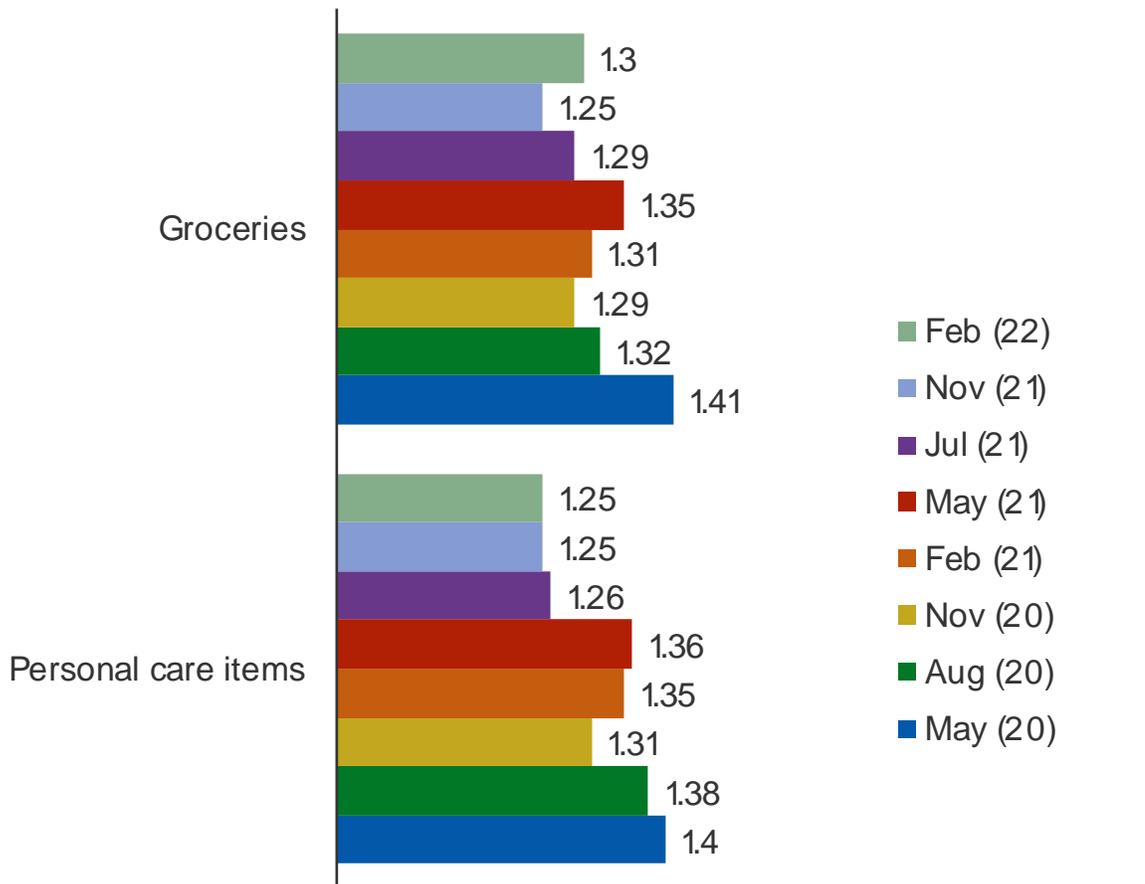
WHEN IT COMES TO BOTH PERSONAL CARE ITEMS AND GROCERIES, ARE YOU KEEPING MORE OR LESS INVENTORY IN YOUR HOME LATELY?

Posed to all respondents



GOING FORWARD, DO YOU PLAN TO CONTINUE KEEPING HIGHER THAN NORMAL INVENTORY ON ITEMS, OR WILL YOU WORK THROUGH YOUR INVENTORY BEFORE BUYING MORE?

Posed to respondents who are keeping higher than normal inventory

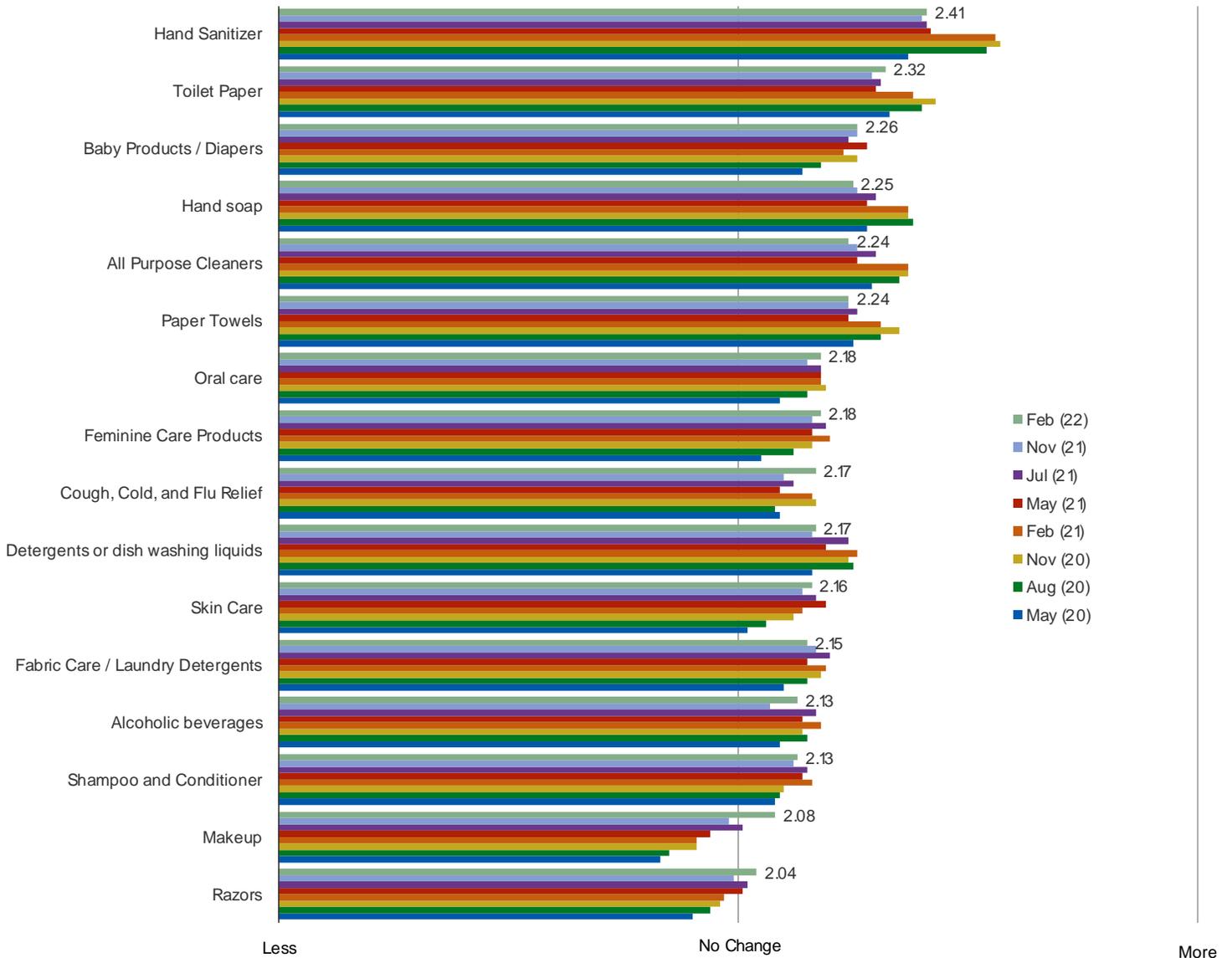


We will continue to keep higher than normal inventory going forward

We will work through our inventory back to normal before buying more

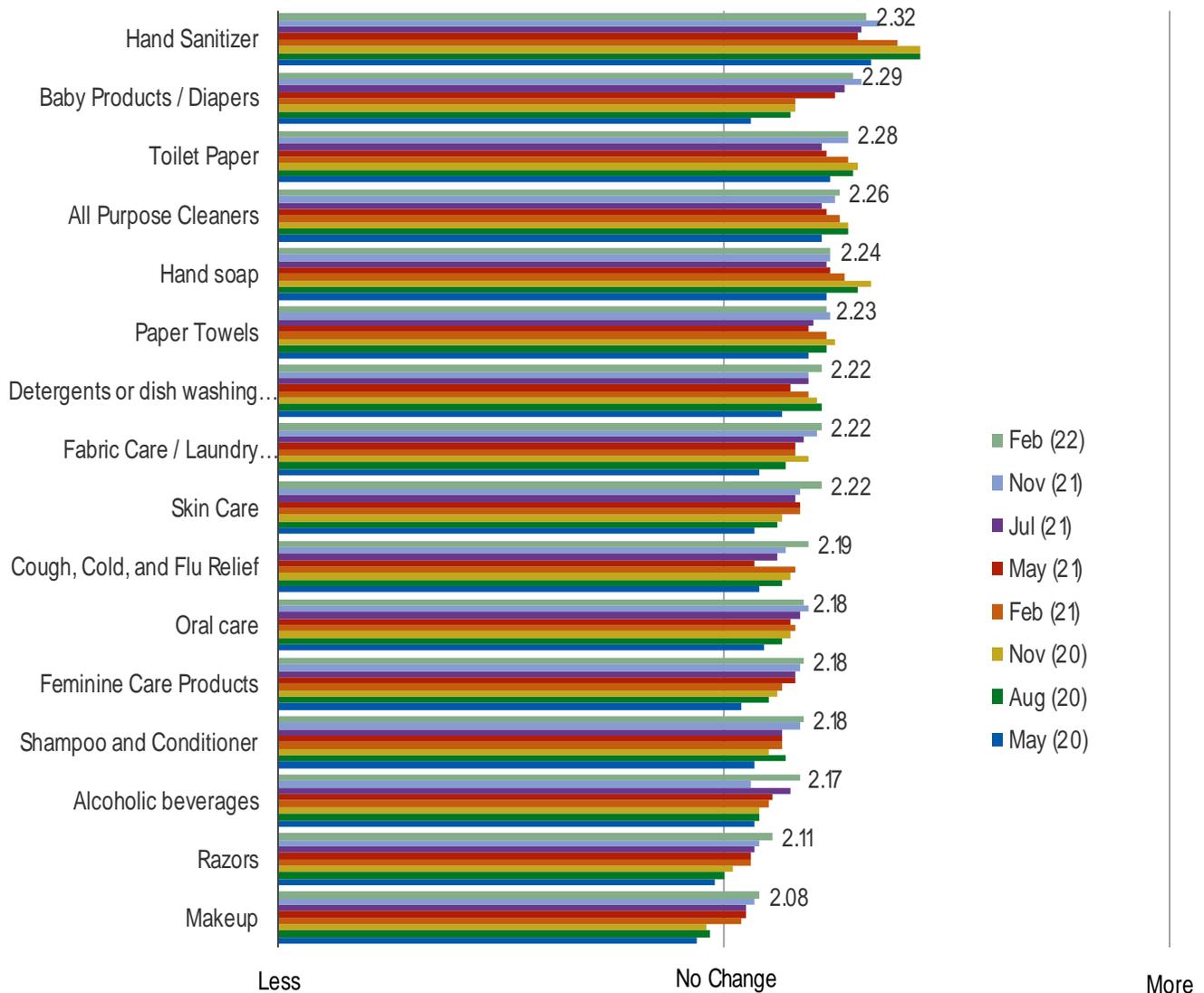
HAVE YOU RECENTLY CHANGED YOUR SPENDING ON THE FOLLOWING ITEMS YOU TYPICALLY SHOP FOR?

Posed to respondents who regularly or occasionally make purchase decisions on each.



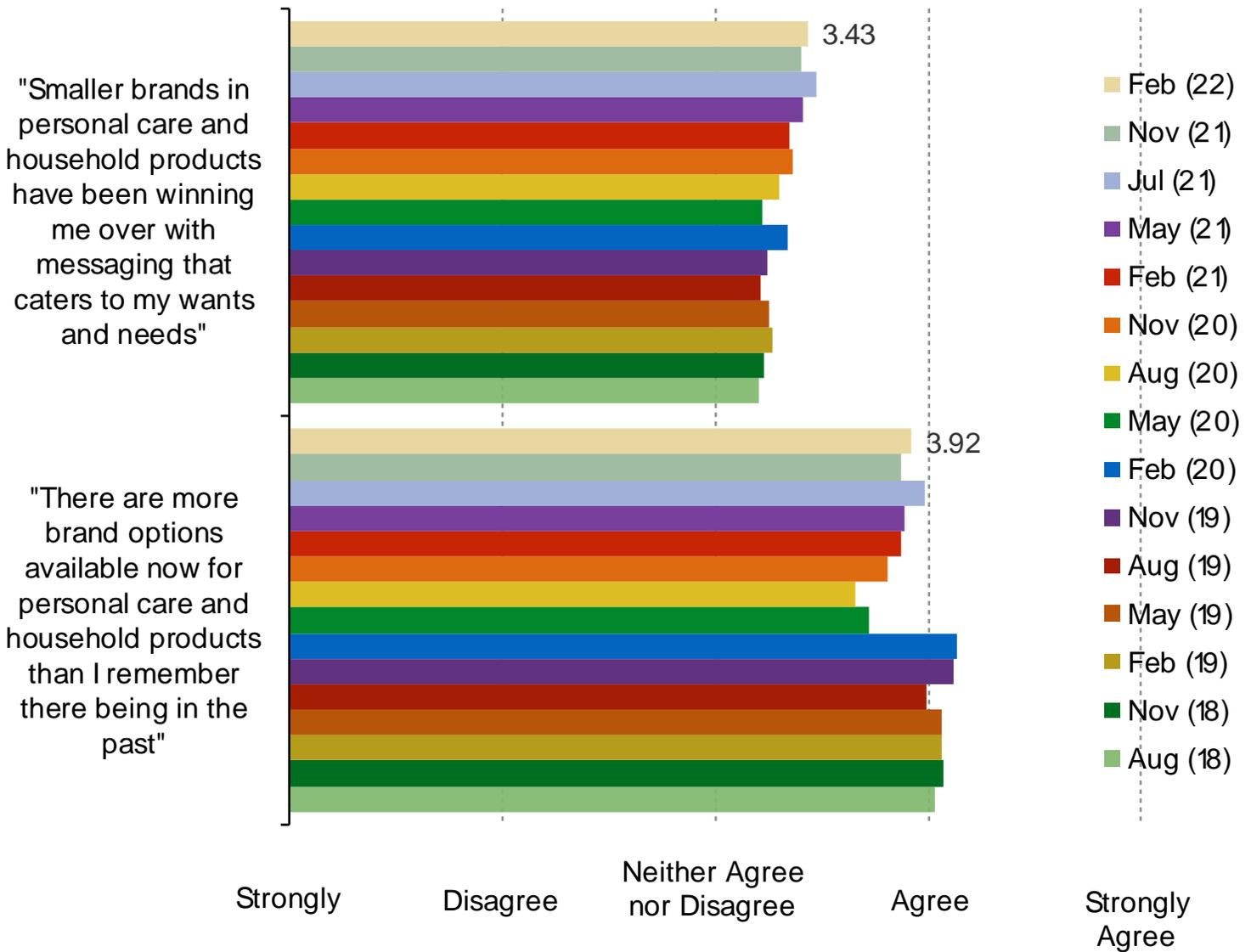
GOING FORWARD, TO YOU EXPECT TO SPEND MORE OR LESS THAN NORMAL ON THE FOLLOWING PRODUCTS?

Posed to respondents who regularly or occasionally make purchase decisions on each.



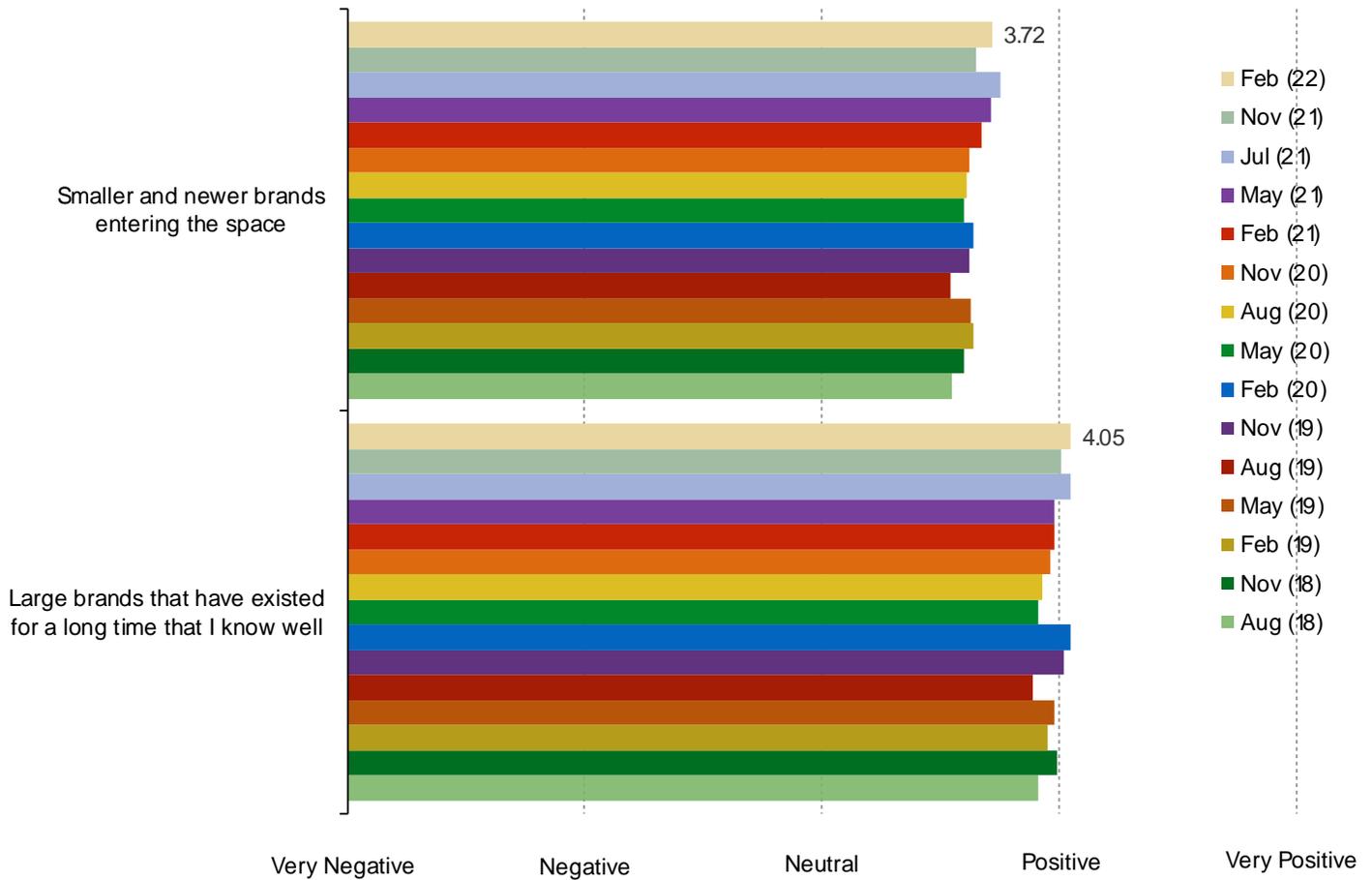
HOW MUCH DO YOU AGREE WITH THE FOLLOWING STATEMENTS?

Posed to all respondents



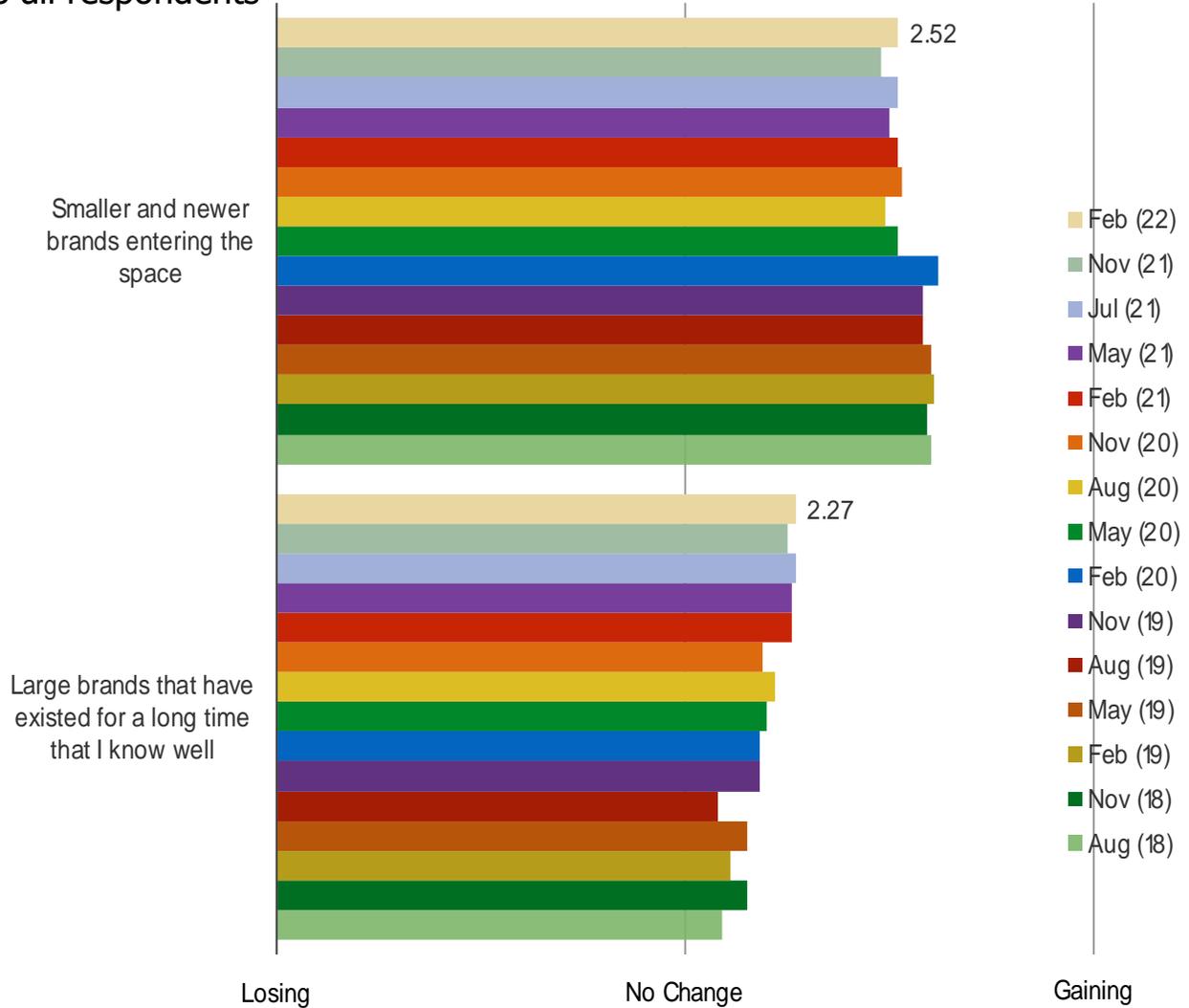
WHEN IT COMES TO HOUSEHOLD AND PERSONAL CARE PRODUCTS, WHAT IS YOUR OPINION OF THE FOLLOWING?

Posed to all respondents



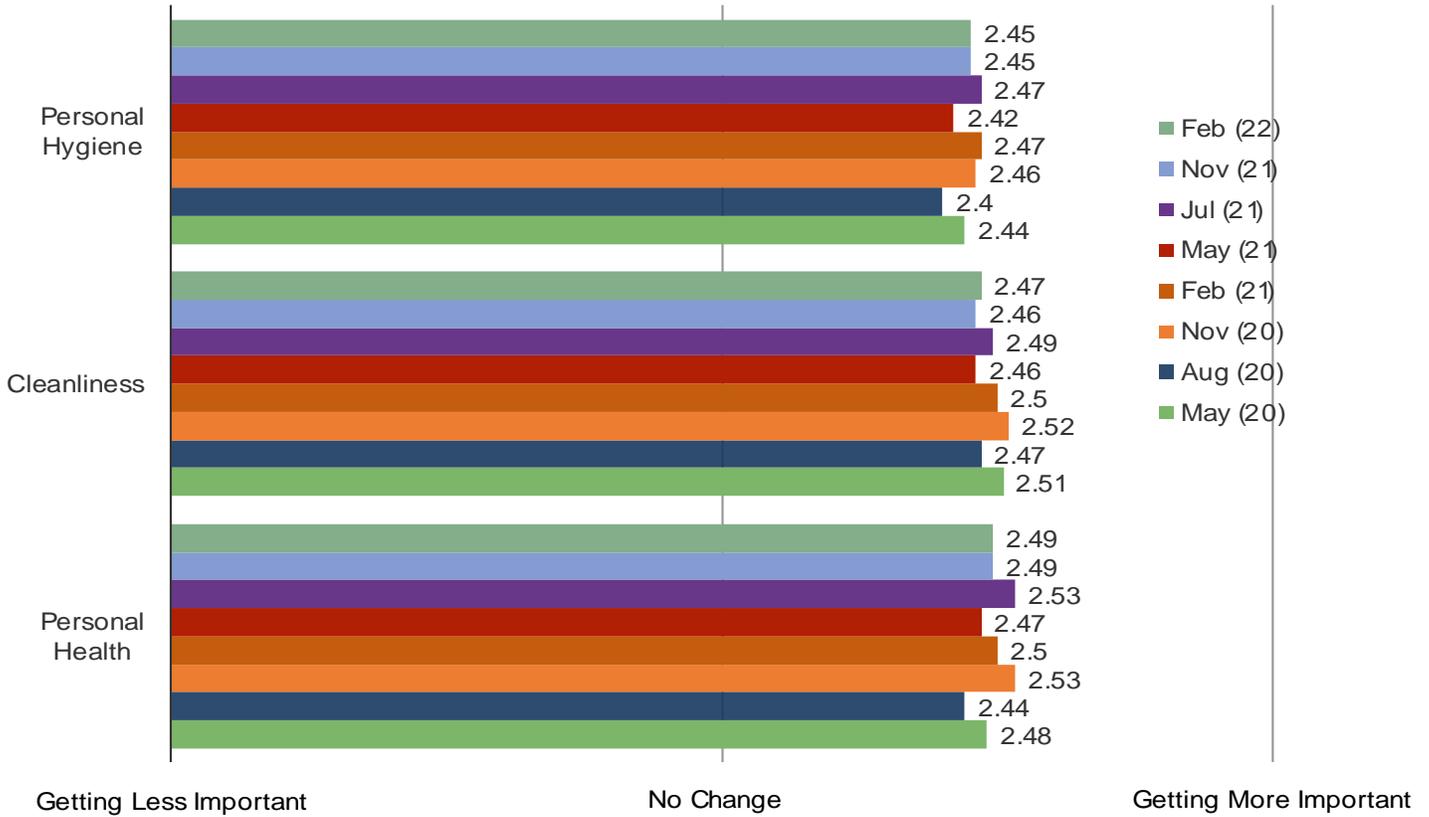
WHEN IT COMES TO HOUSEHOLD AND PERSONAL CARE PRODUCTS, DO YOU FEEL THE FOLLOWING ARE GAINING OR LOSING POPULARITY?

Posed to all respondents



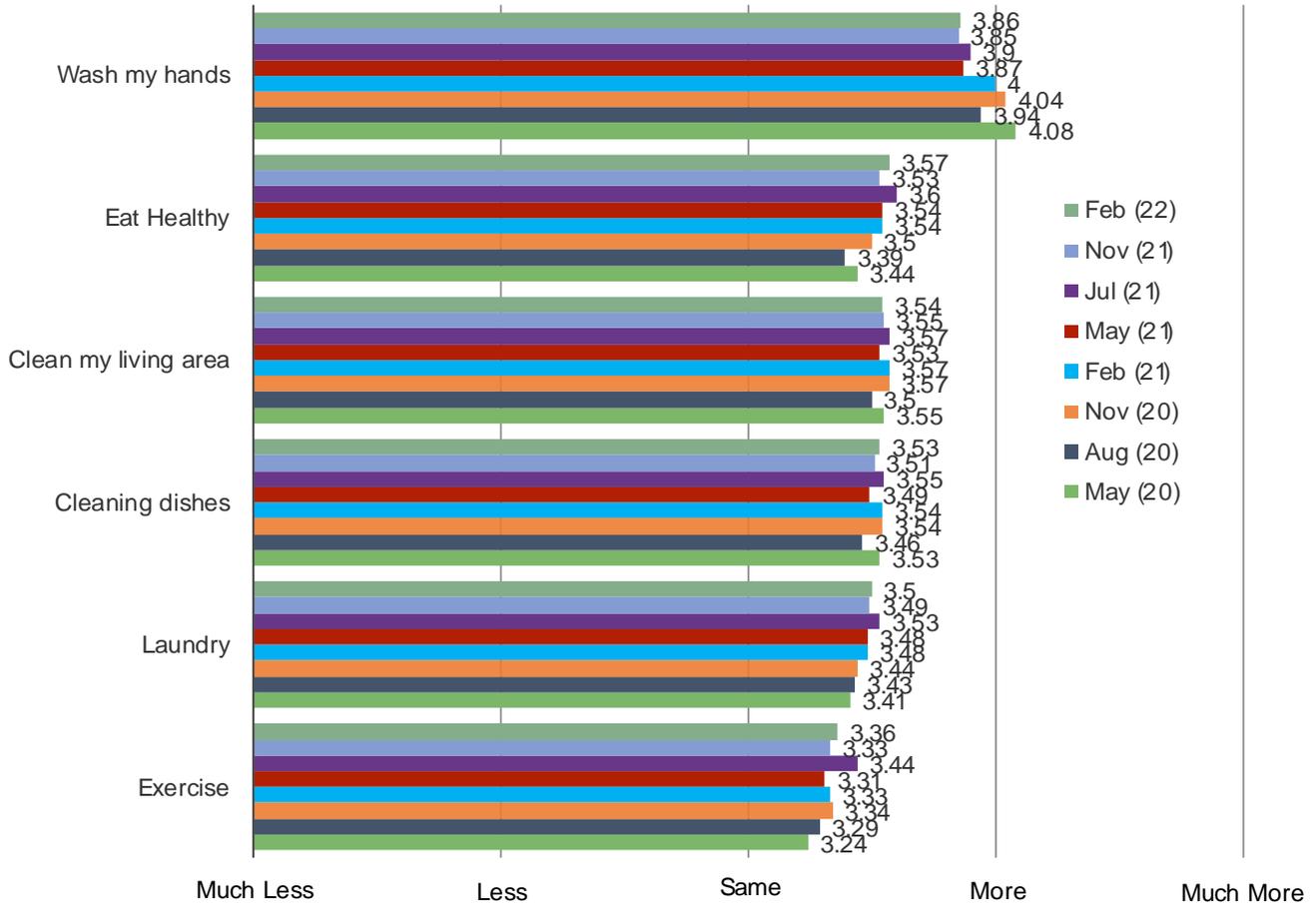
ARE THE FOLLOWING CURRENTLY GETTING MORE OR LESS IMPORTANT TO YOU?

Posed to all respondents.



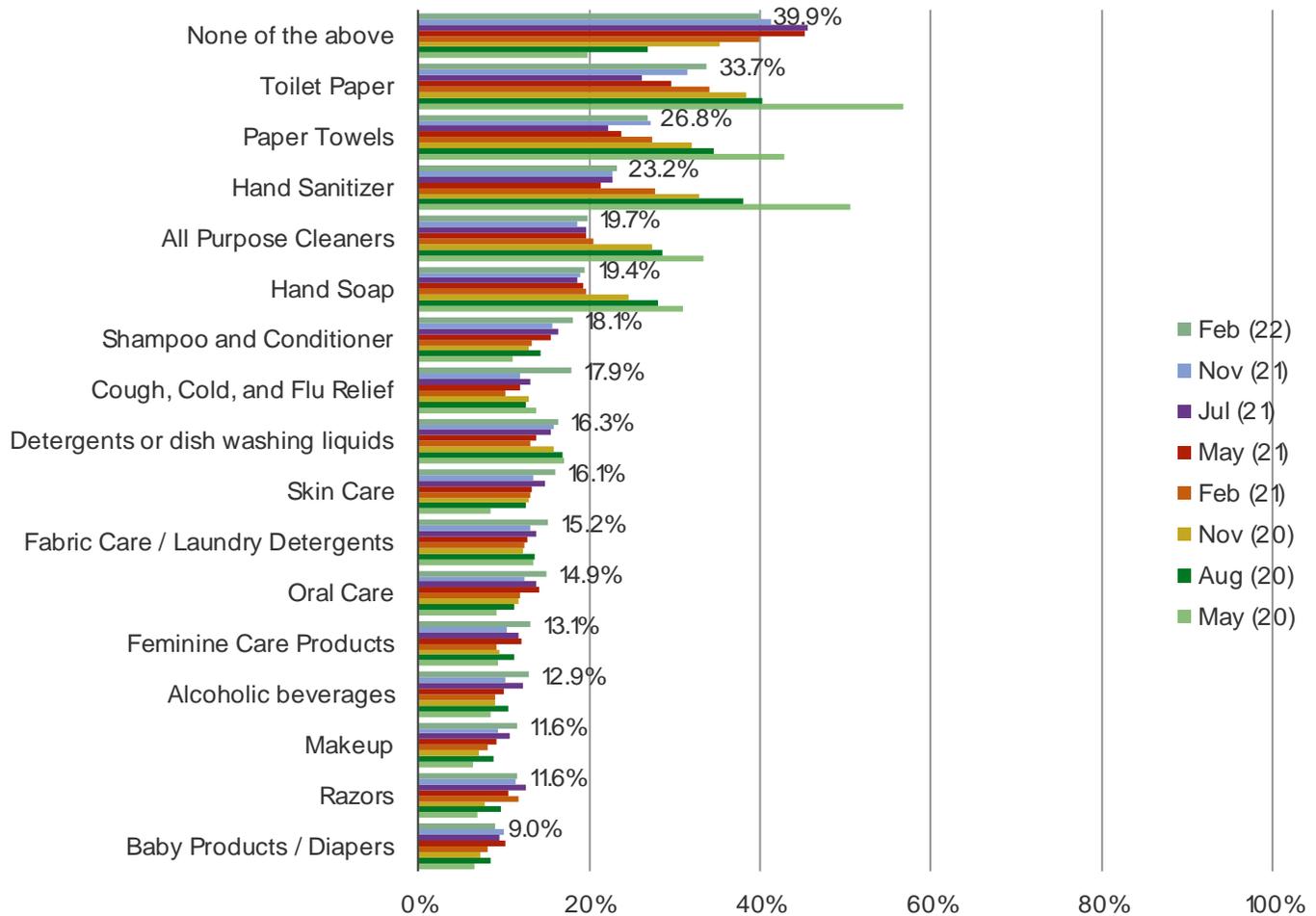
HAVE YOU RECENTLY CHANGED HOW OFTEN YOU DO THE FOLLOWING?

Posed to all respondents.



HAVE YOU HAD TROUBLE WITH INVENTORY OUTAGES OF ANY OF THE FOLLOWING TYPES OF PRODUCTS IN THE PAST MONTH? (SELECT ALL THAT APPLY)

Posed to all respondents.

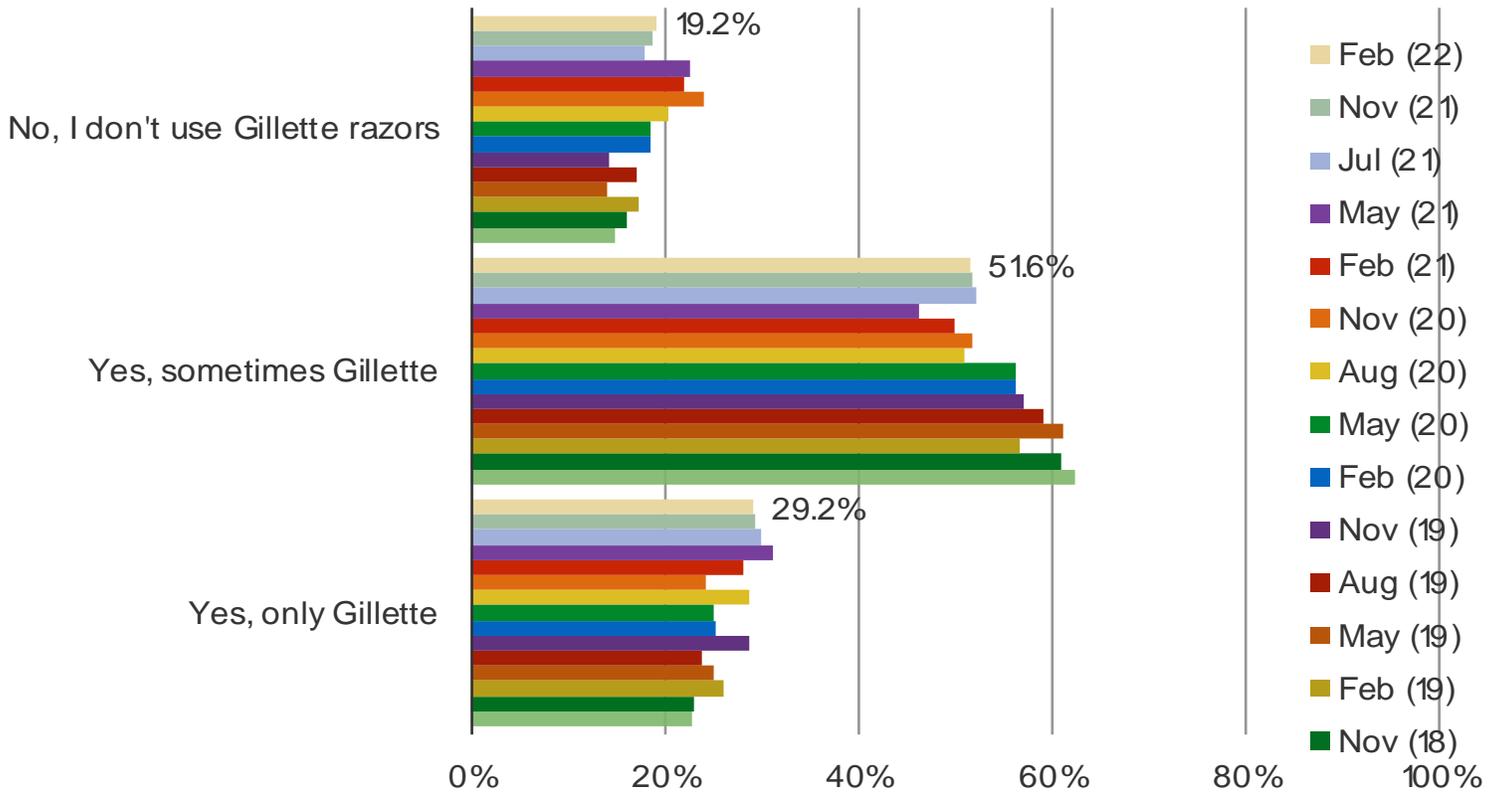


Davids vs. Goliaths

GILLETTE

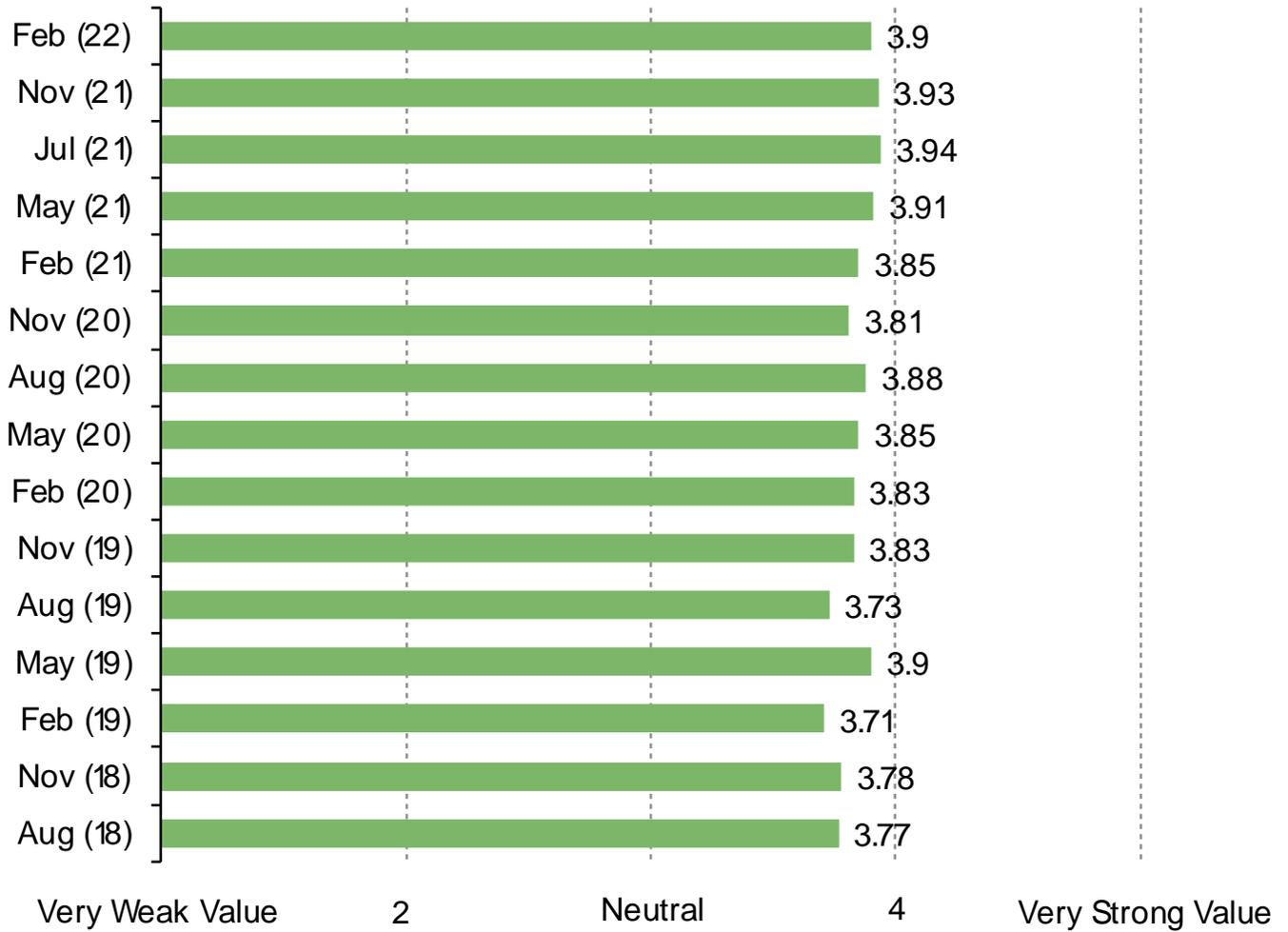
DO YOU USE GILLETTE RAZORS?

Posed to respondents who make purchase decisions on razors



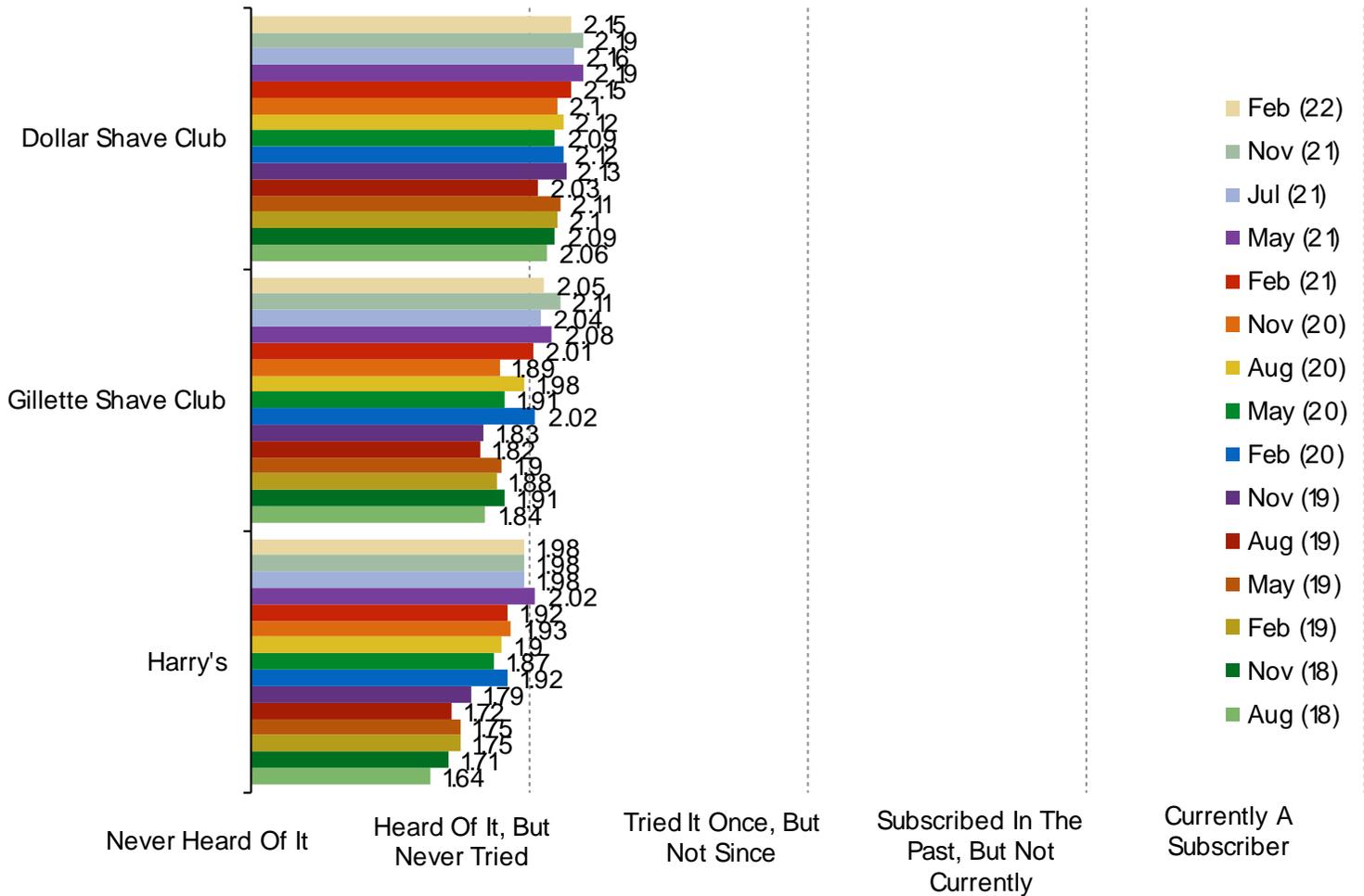
WHAT IS YOUR OPINION OF THE VALUE GILLETTE RAZORS OFFERS FOR THE PRICE?

Posed to respondents who make purchase decisions on razors



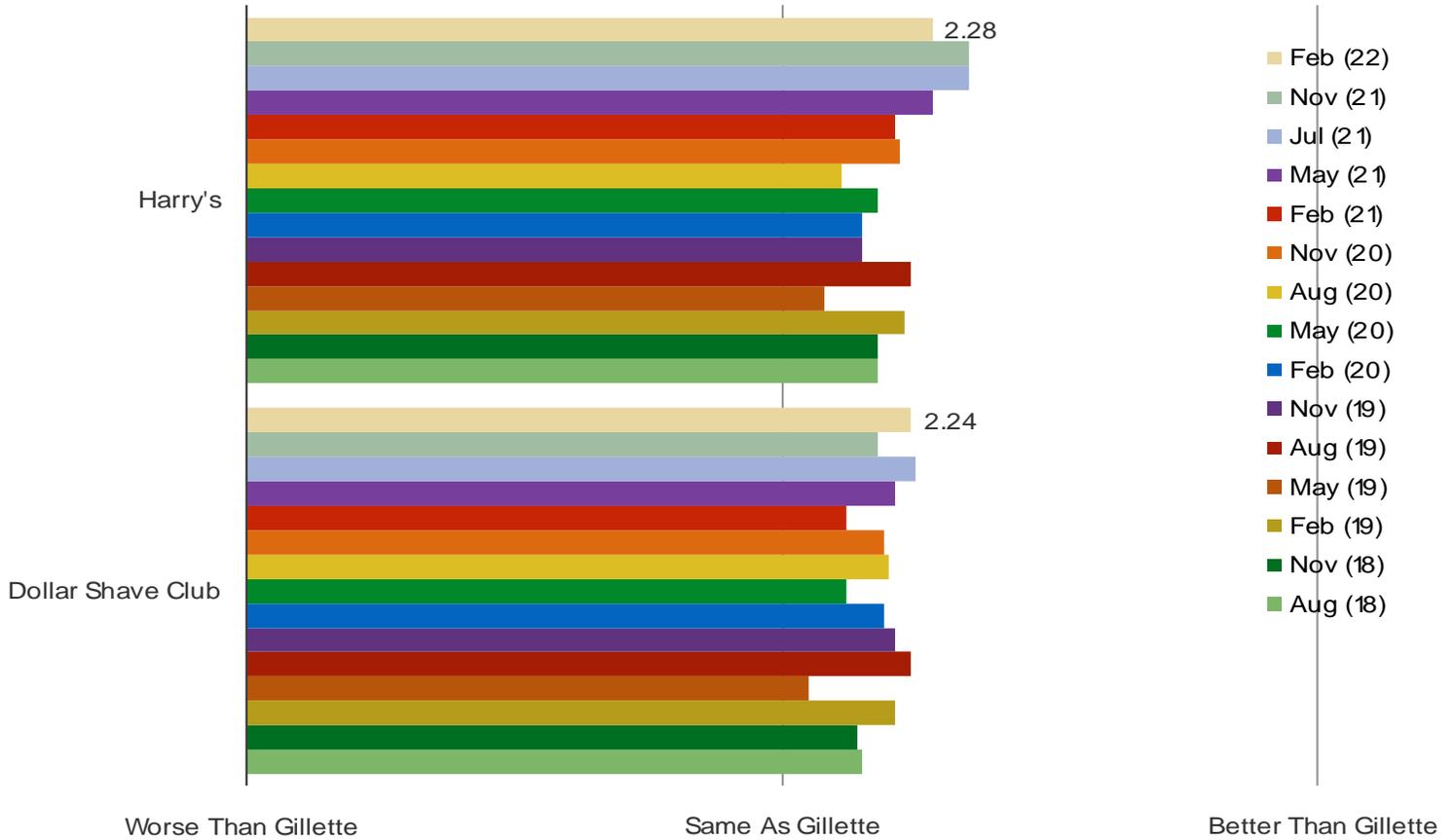
WHAT IS YOUR EXPERIENCE WITH THE FOLLOWING SHAVE CLUBS?

Posed to respondents who make purchase decisions on razors



WHAT IS YOUR OPINION OF THE FOLLOWING?

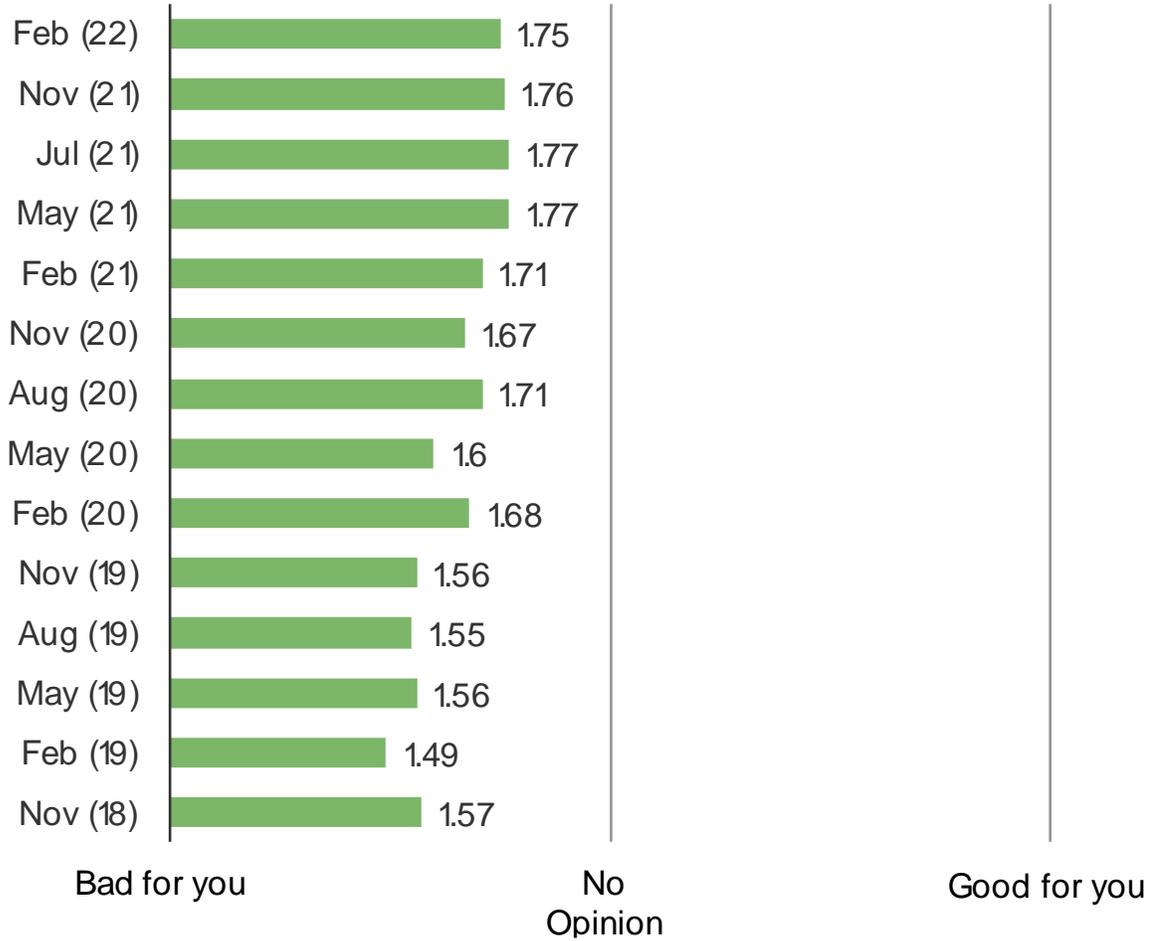
Posed to respondents who have at least tried Harry's and/or Dollar Shave Club



SODA AND ENERGY DRINKS

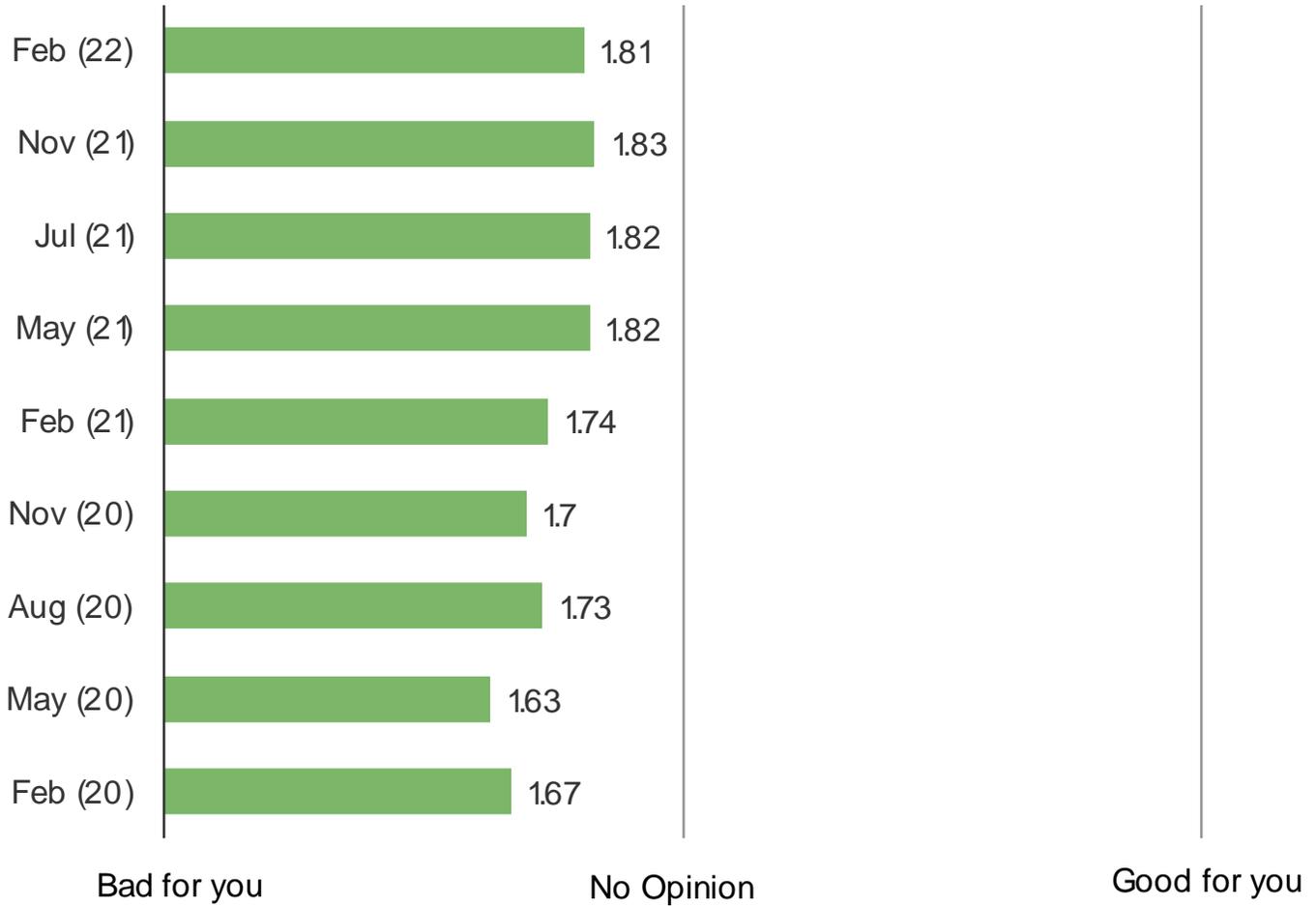
IN YOUR OPINION, IS SODA...

Posed to all respondents



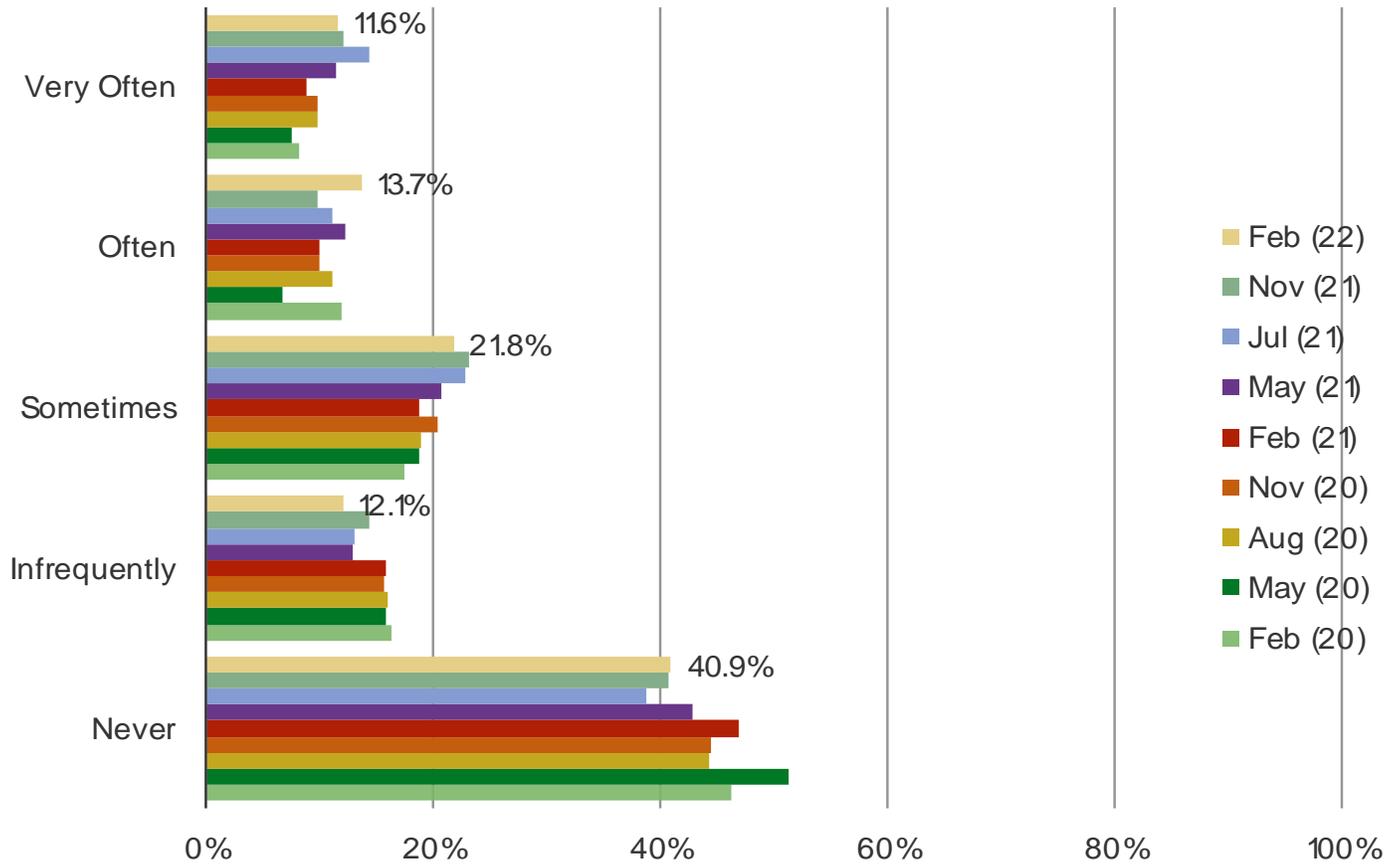
IN YOUR OPINION, ARE ENERGY DRINKS...

Posed to all respondents



DO YOU CONSUME ENERGY DRINKS?

Posed to all respondents



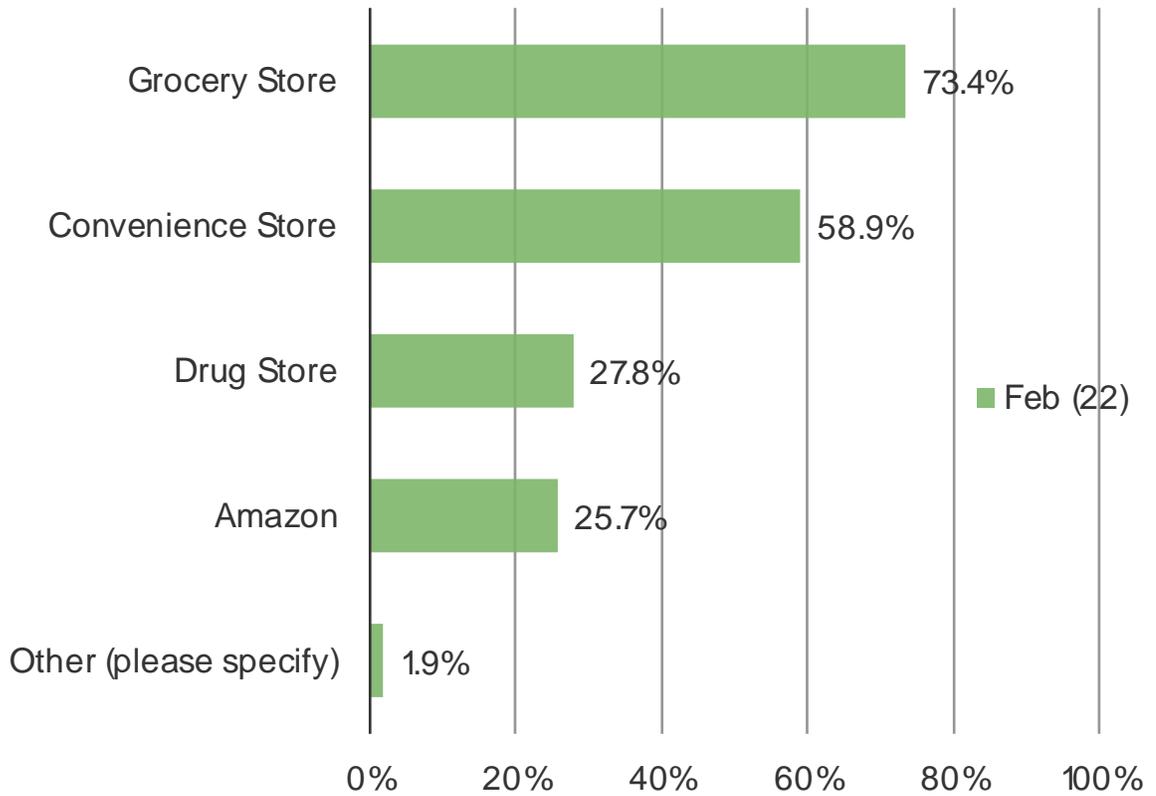
WHEN YOU THINK OF ENERGY DRINKS, WHICH BRAND COMES TO MIND FIRST?

Posed to all respondents who drink energy drinks at least infrequently (N = 740).



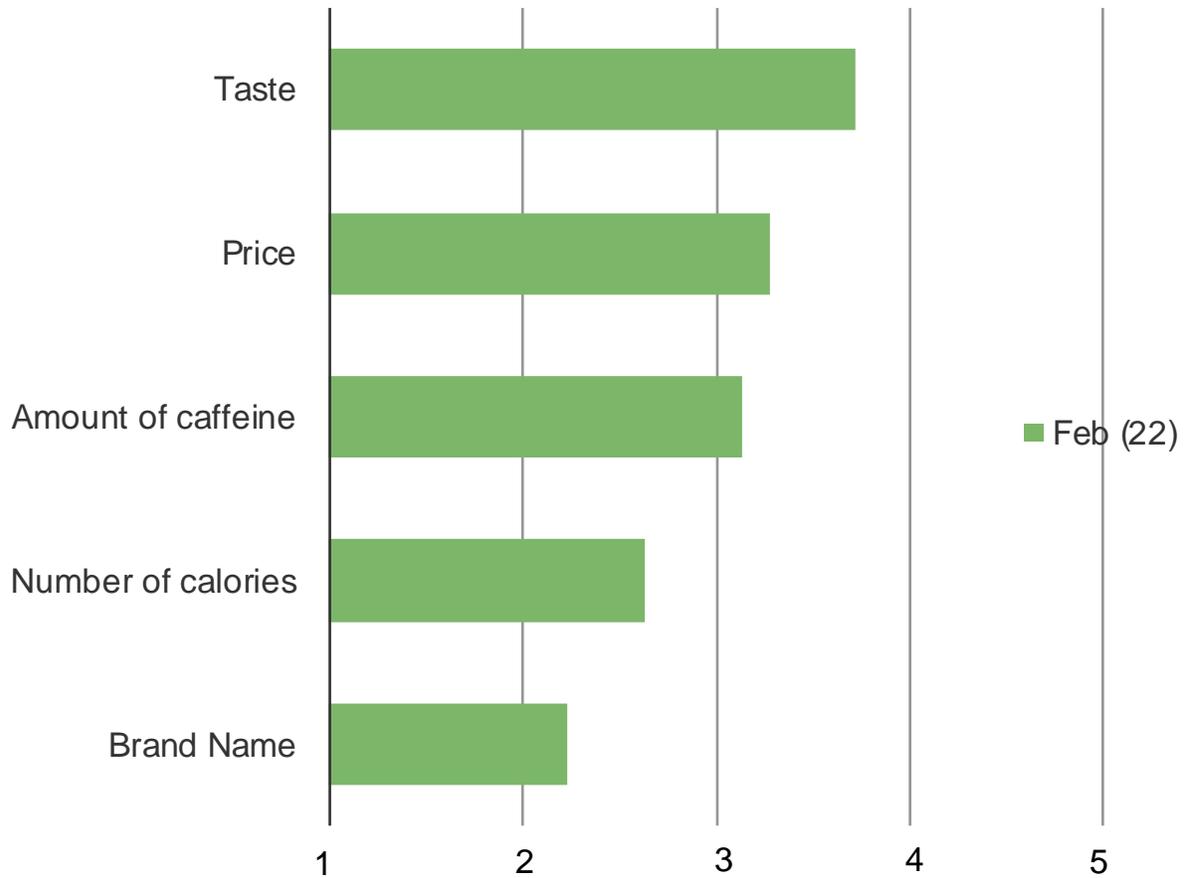
WHERE DO YOU BUY ENERGY DRINKS? (SELECT ALL THAT APPLY)

Posed to all respondents who drink energy drinks at least infrequently (N = 740).



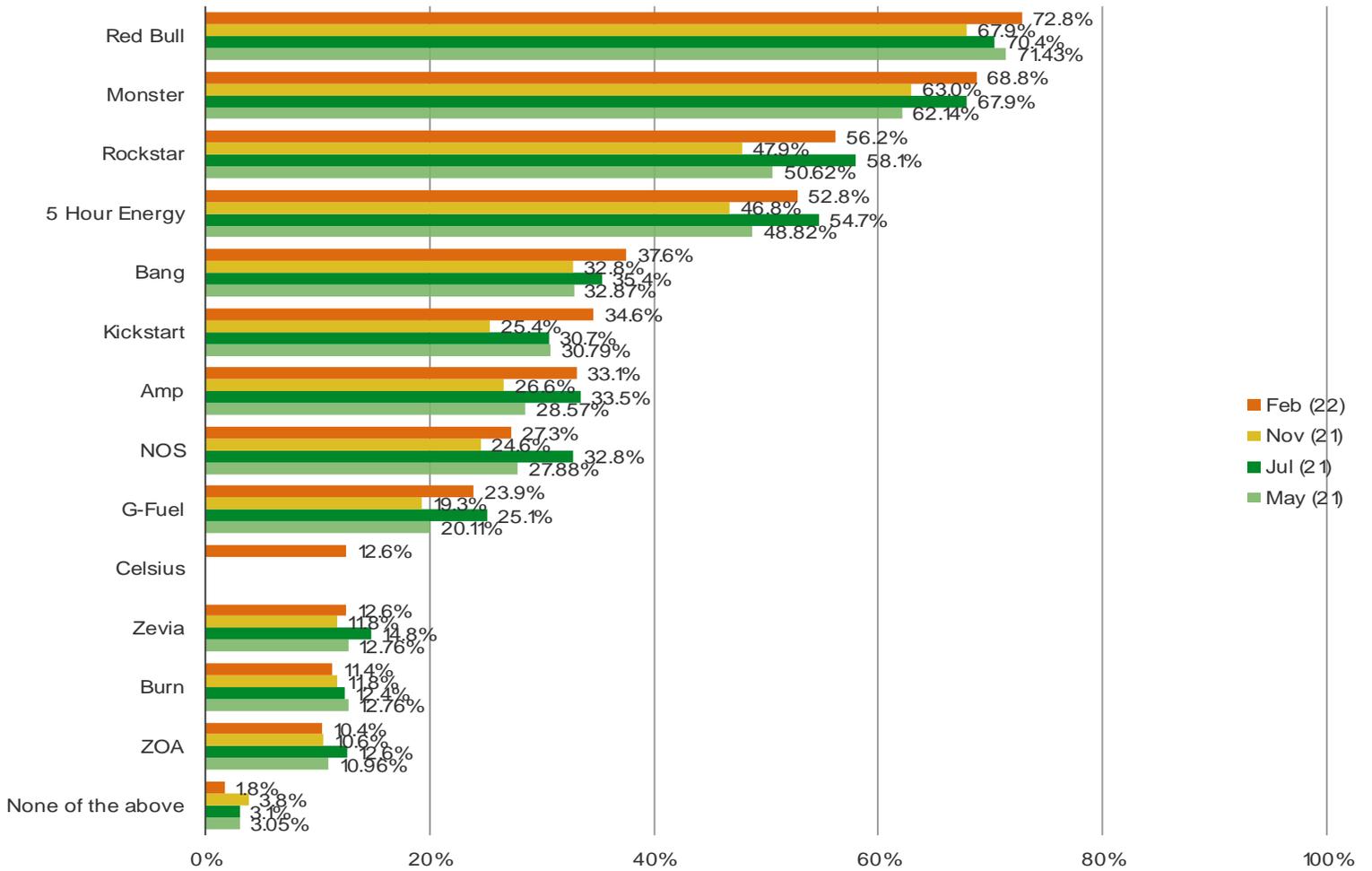
PLEASE RANK WHAT YOU VALUE IN ENERGY DRINKS, FROM MOST AT THE TOP TO LEAST AT THE BOTTOM.

Posed to all respondents who drink energy drinks at least infrequently (N = 740).



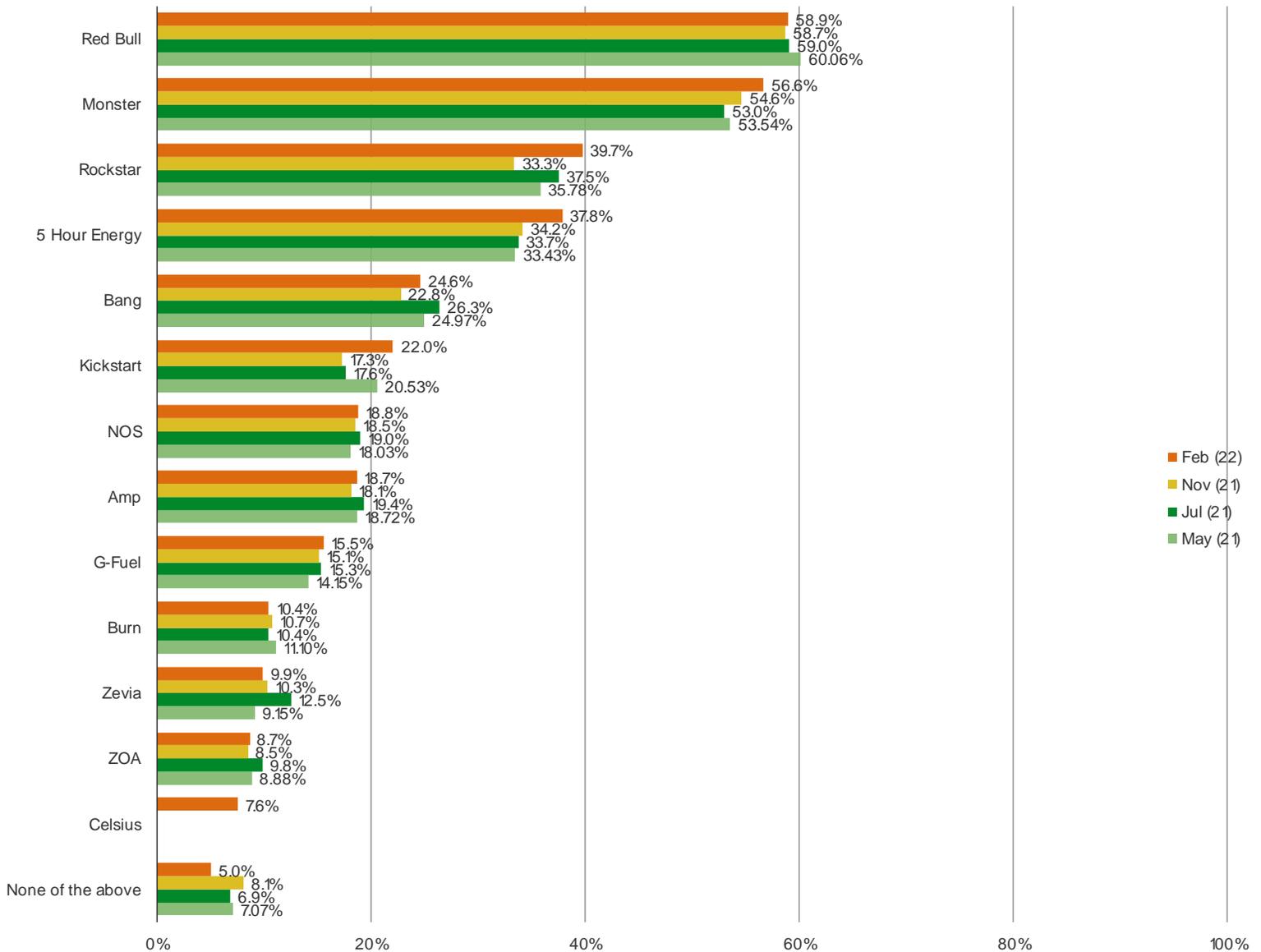
HAVE YOU HEARD OF ANY OF THE FOLLOWING ENERGY DRINK BRANDS? SELECT ALL THAT APPLY

Posed to all respondents who drink energy drinks at least infrequently (N = 740).



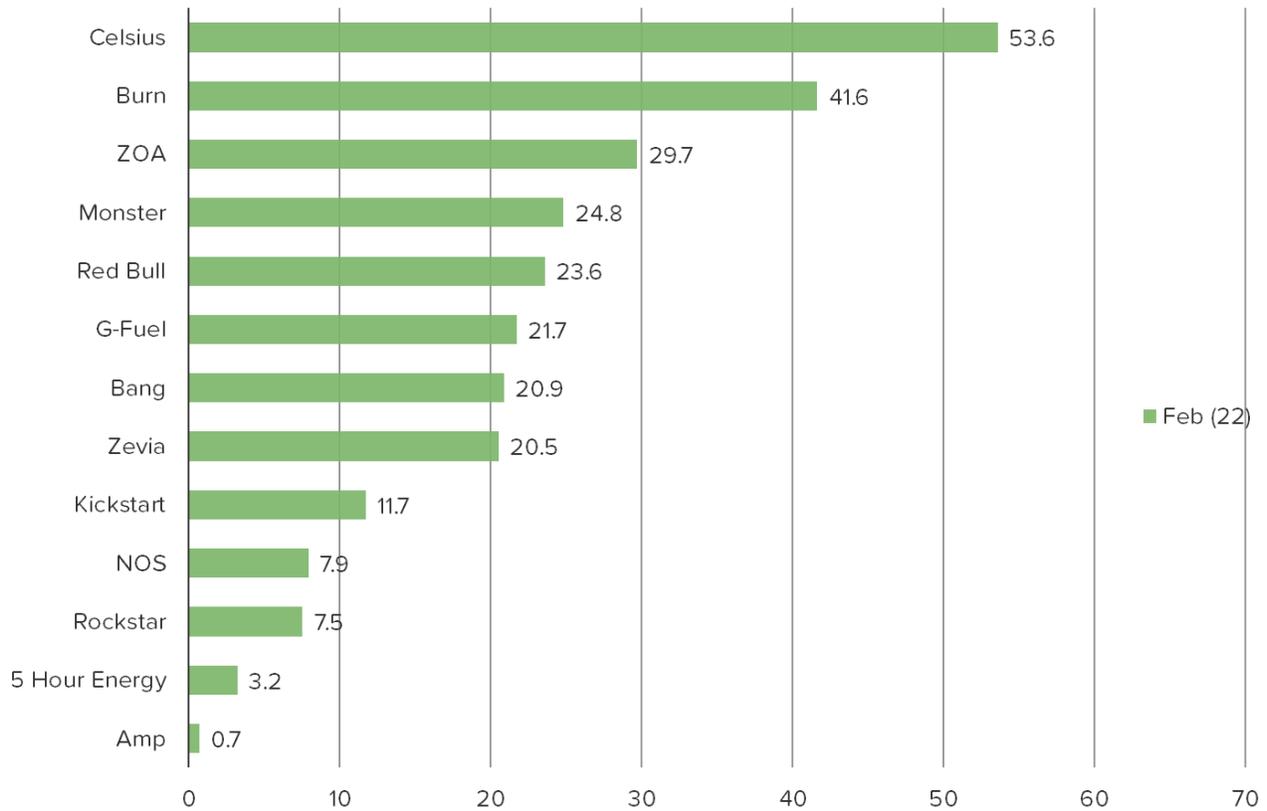
HAVE YOU EVER HAD/DRANK ENERGY DRINKS FROM ANY OF THE FOLLOWING BRANDS? SELECT ALL THAT APPLY

Posed to all respondents who drink energy drinks at least infrequently (N = 740).



HOW LIKELY WOULD YOU BE TO RECOMMEND THE FOLLOWING TO A FRIEND OR COLLEAGUE?

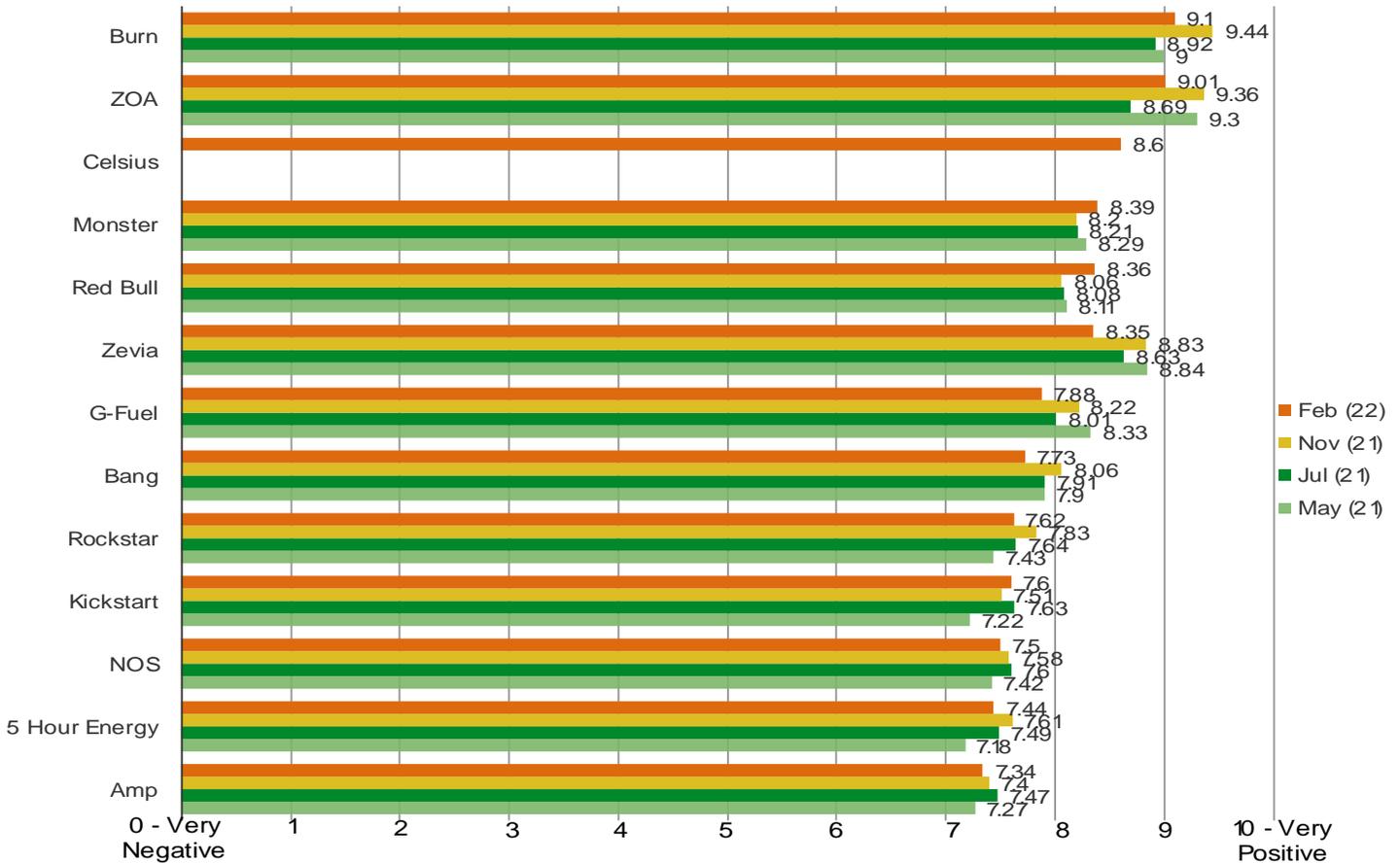
Posed to all respondents who drink the below energy drink brands.



	N=
Red Bull	436
Monster	419
Rockstar	294
NOS	139
Burn	77
ZOA	64
G-Fuel	115
5 Hour Energy	280
Bang	182
Amp	138
Zevia	73
Kickstart	163
Celsius	56

WHAT IS YOUR OPINION OF THE FOLLOWING?

Posed to all respondents who are aware of the below energy drink brands.

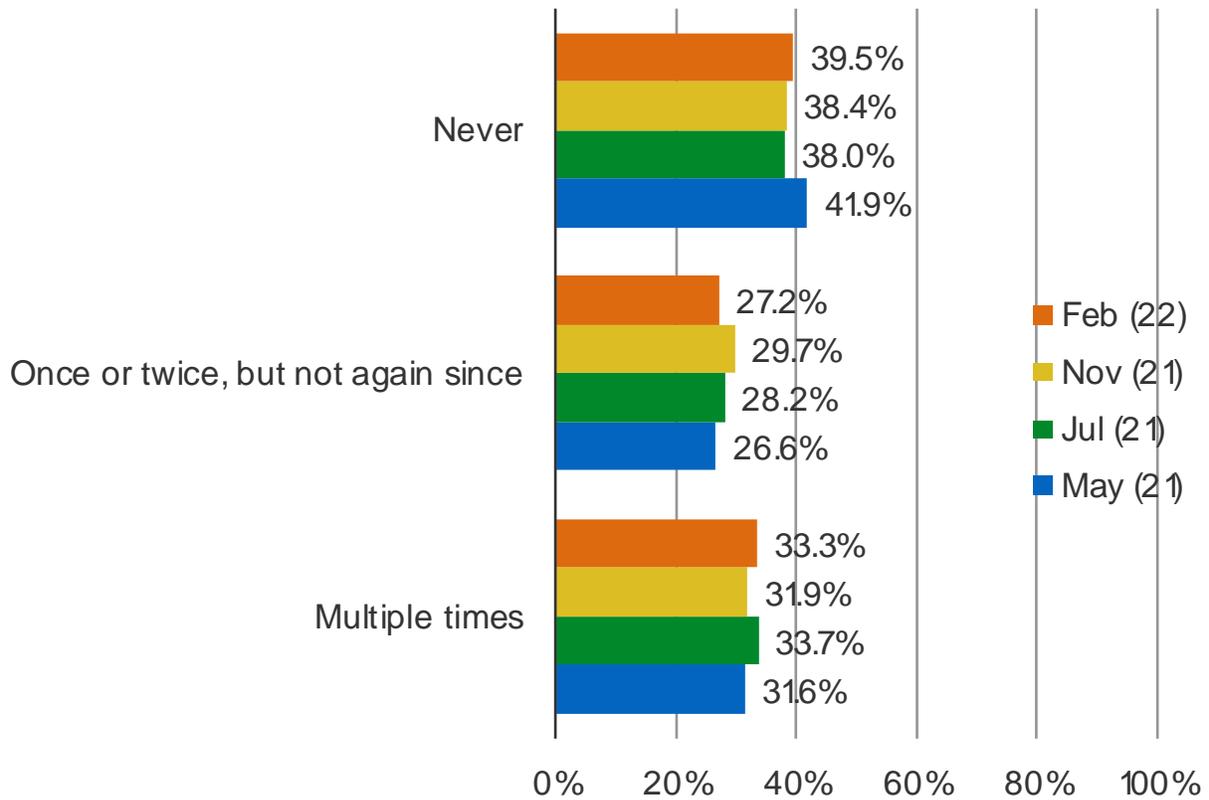


	N=
Red Bull	539
Monster	509
Rockstar	416
NOS	202
Burn	84
ZOA	77
G-Fuel	177
5 Hour Energy	391
Bang	278
Amp	245
Zevia	93
Kickstart	256
Celsius	93

HARD SELTZER

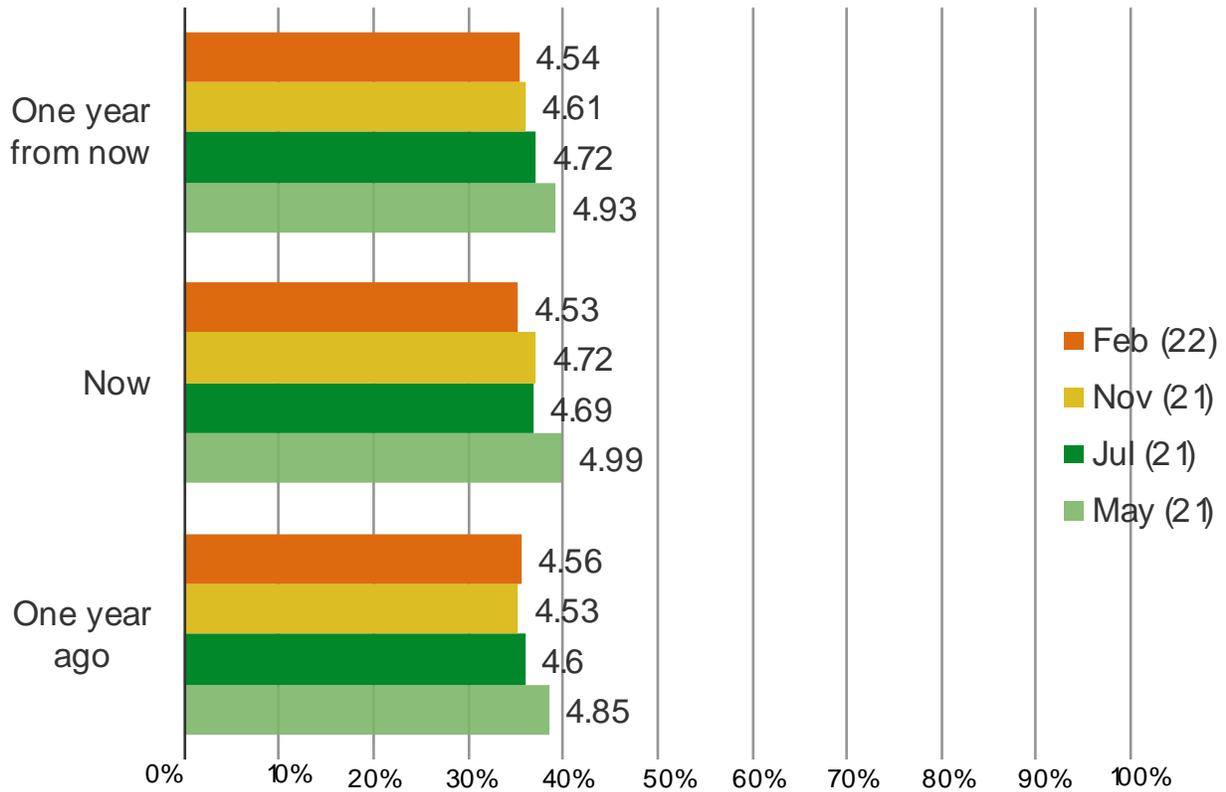
HAVE YOU EVER CONSUMED HARD SELTZER BEVERAGES? IE - CARBONATED WATER/SELTZER BEVERAGES WITH ALCOHOL IN IT.

Posed to all respondents.



WHAT PERCENTAGE OF YOUR ALCOHOL CONSUMPTION WOULD YOU ESTIMATE GOES TO HARD SELZTER?

Posed to all respondents who have consumed hard seltzer (N = 757).



WHEN YOU THINK OF HARD SELTZER BRANDS, WHICH COMES TO MIND FIRST?

Posed to all respondents who have consumed hard seltzer (N = 757).

February 2022



November 2021

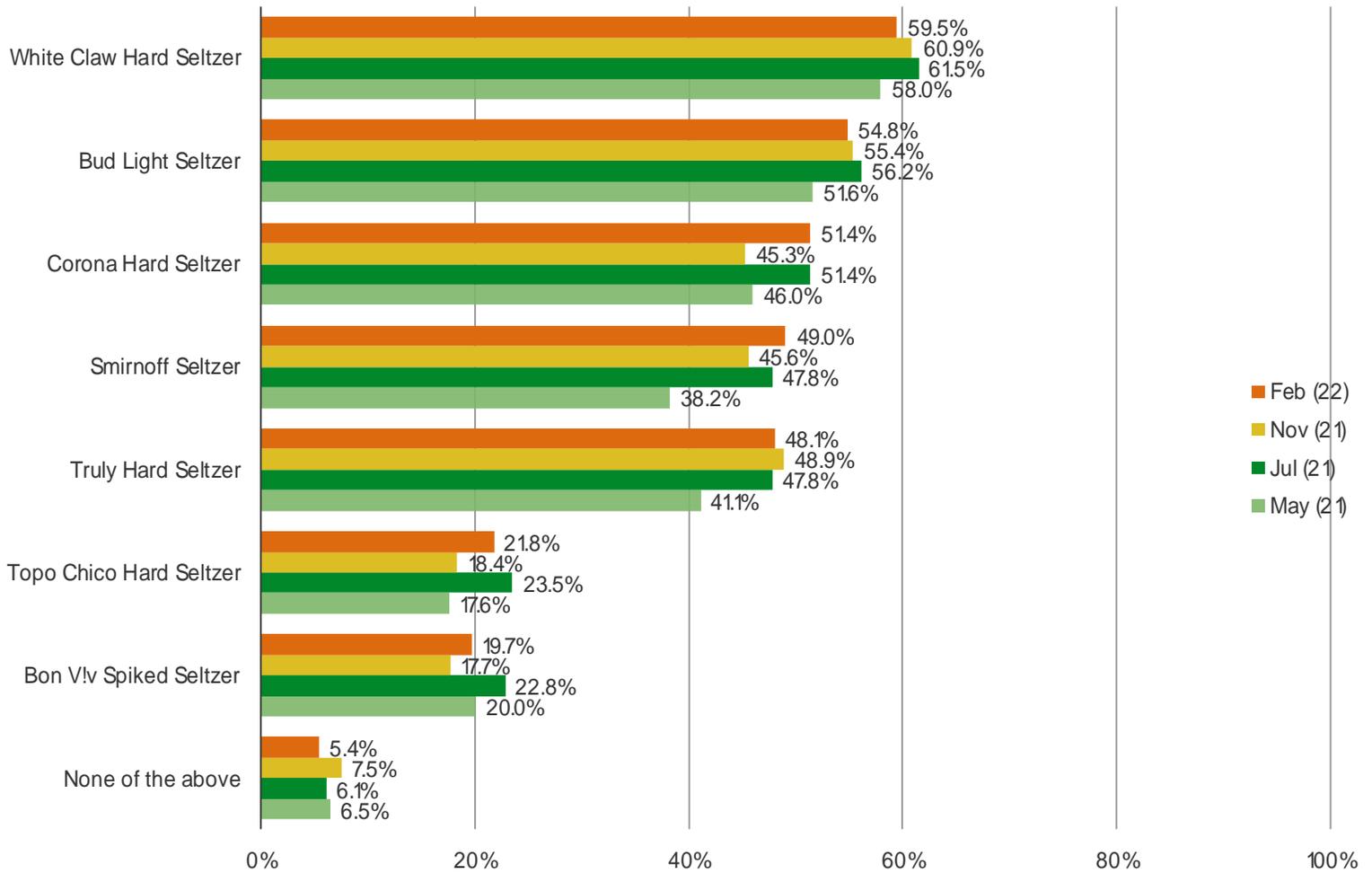


July 2021



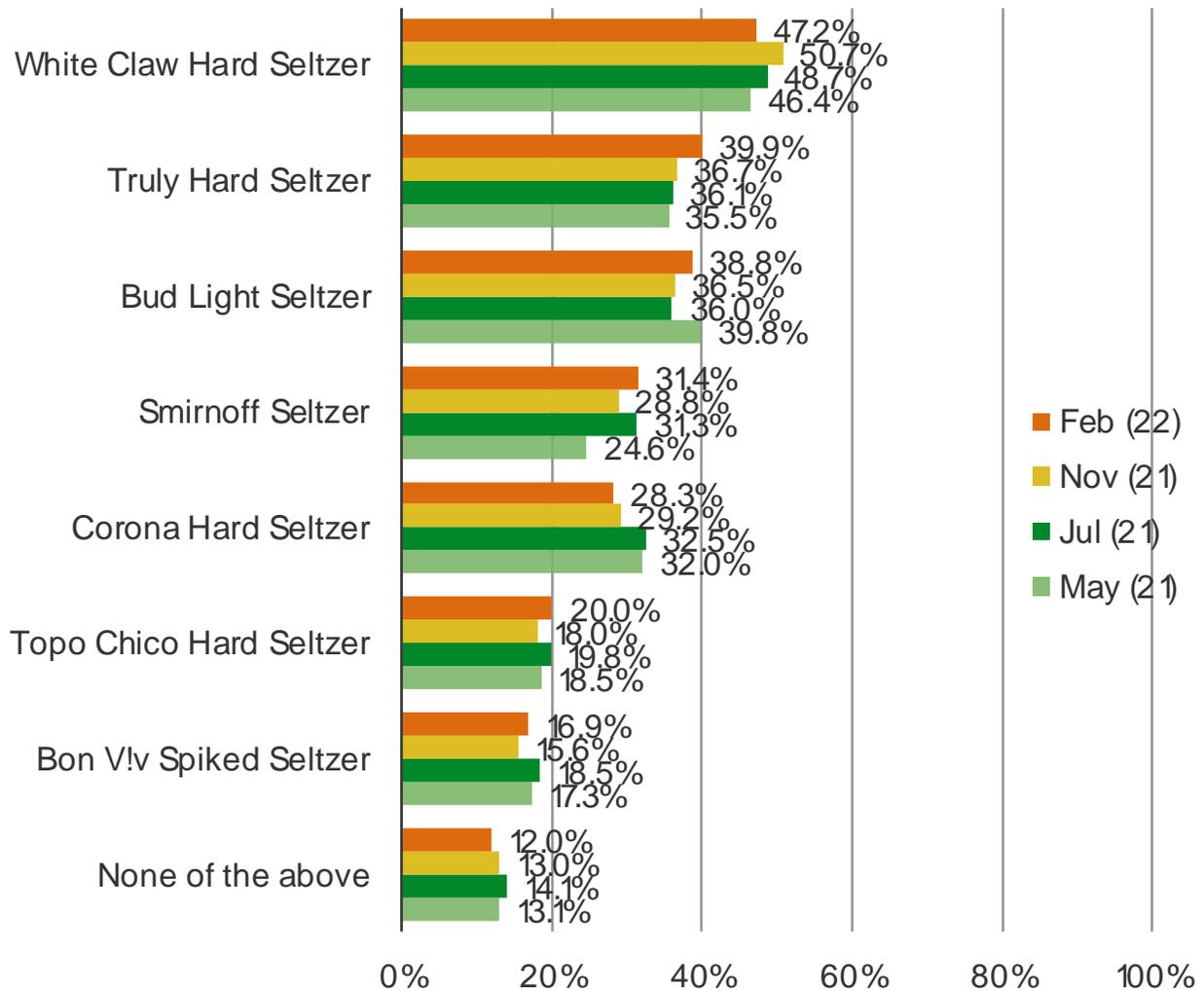
ARE YOU AWARE OF ANY OF THE FOLLOWING BRANDS? SELECT ALL THAT APPLY

Posed to all respondents who have consumed hard seltzer (N = 757).



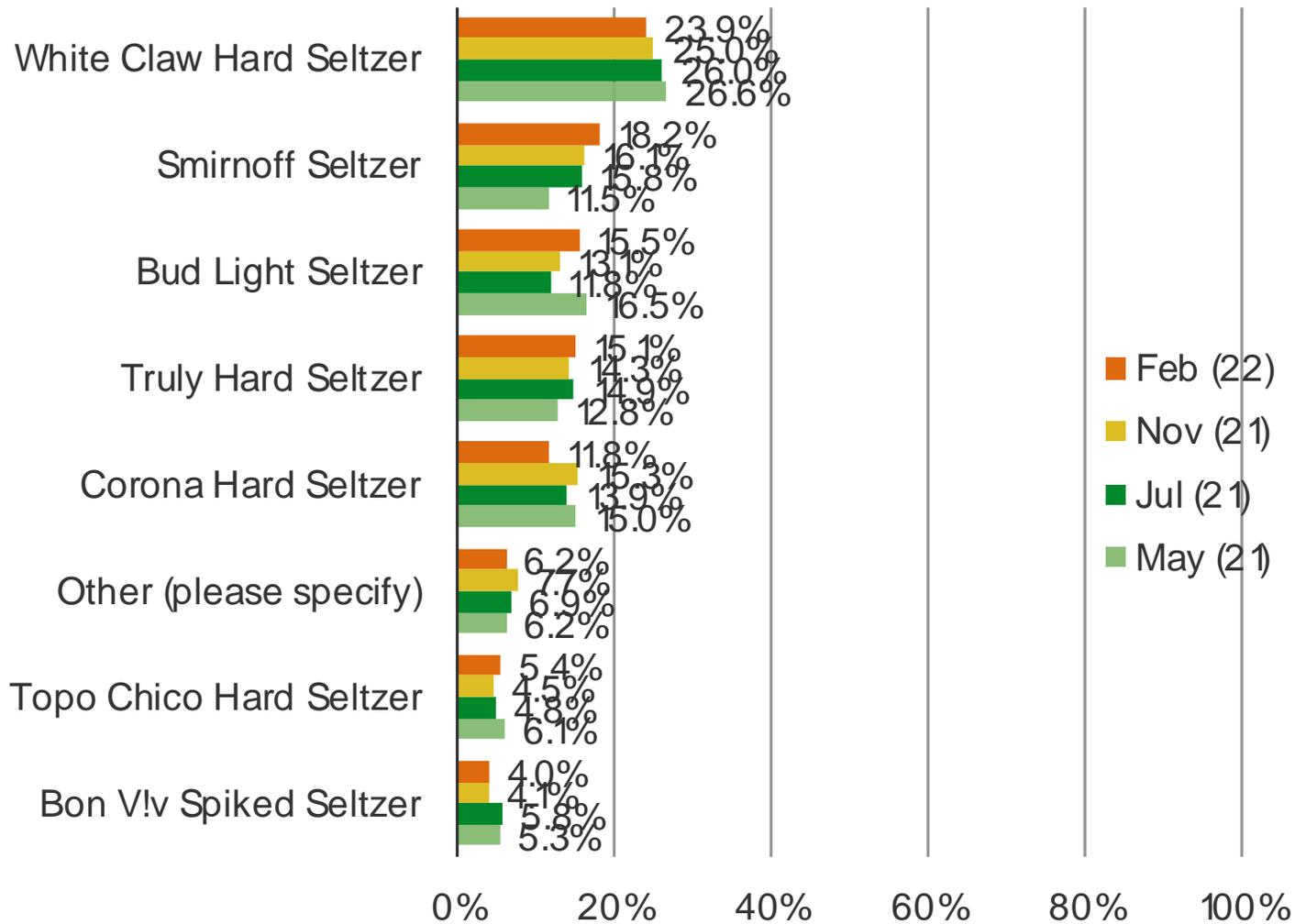
HAVE YOU EVER TRIED HARD SELTZER FROM ANY OF THE FOLLOWING BRANDS? SELECT ALL THAT APPLY

Posed to all respondents who have consumed hard seltzer (N = 757).



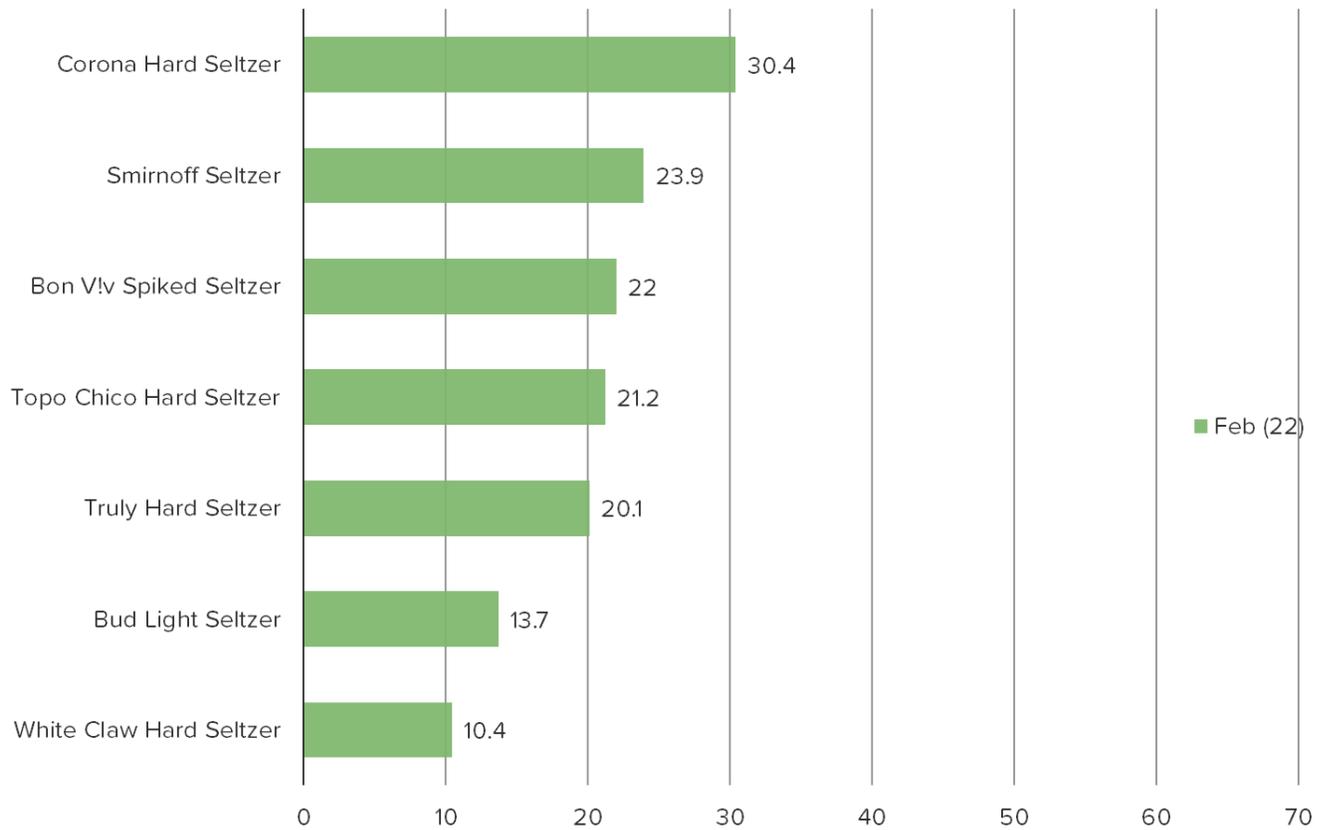
IN YOUR OPINION, WHICH BRAND IS BEST FOR HARD SELTZER? SELECT ALL THAT APPLY

Posed to all respondents who have consumed hard seltzer (N = 757).



HOW LIKELY WOULD YOU BE TO RECOMMEND THE FOLLOWING TO A FRIEND OR COLLEAGUE?

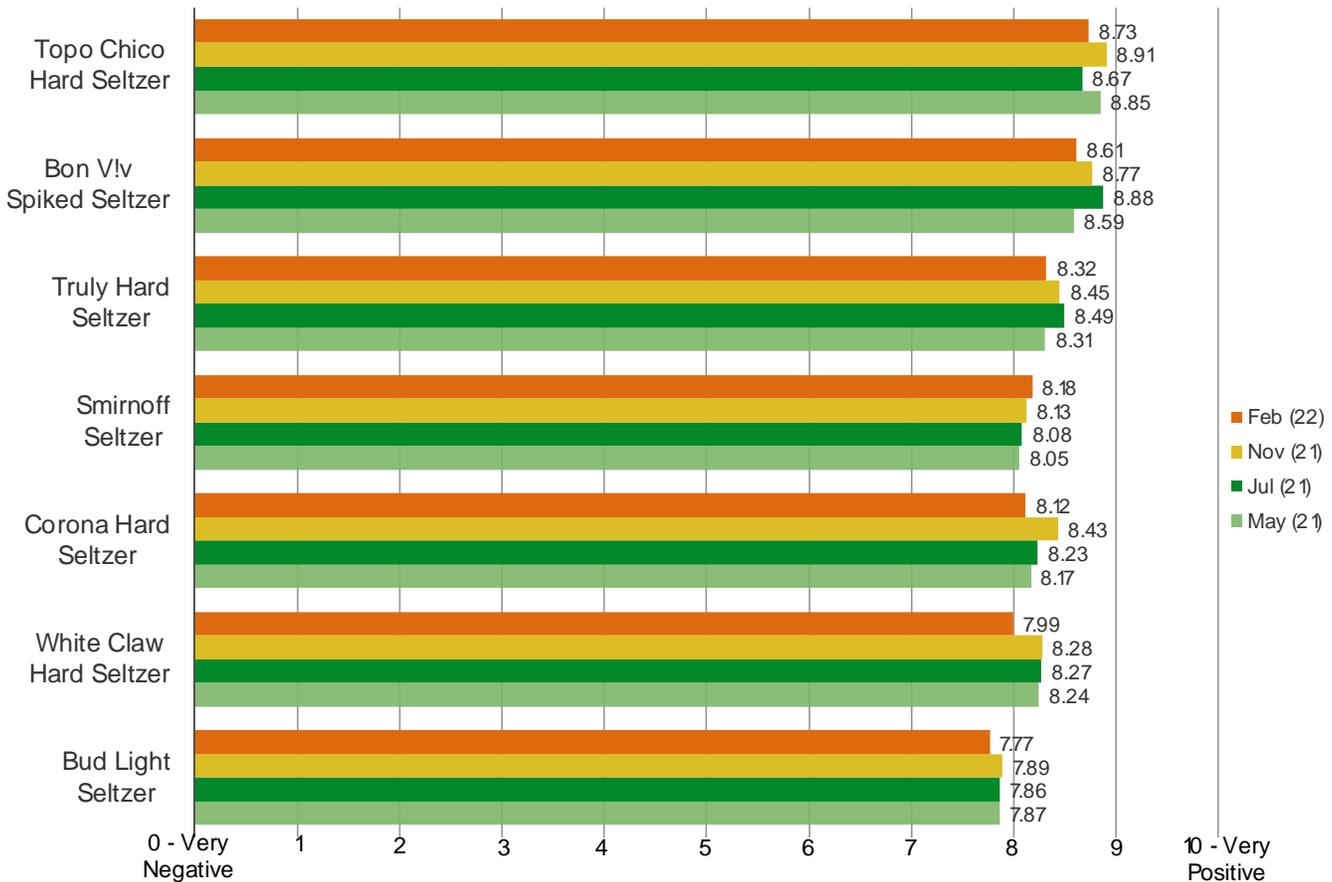
Posed to all hard seltzer drinkers who have tried each of the following.



	N=
Topo Chico Hard Seltzer	151
White Claw Hard Seltzer	355
Bon Viv Spiked Seltzer	127
Truly Hard Seltzer	298
Corona Hard Seltzer	214
Bud Light Seltzer	293
Smirnoff Seltzer	238

WHAT IS YOUR OPINION OF THE FOLLOWING BRANDS FOR THEIR HARD SELTZER PRODUCTS?

Posed to all hard seltzer drinkers who have heard of each of the following.



	N=
Topo Chico Hard Seltzer	165
White Claw Hard Seltzer	450
Bon V!v Spiked Seltzer	149
Truly Hard Seltzer	364
Corona Hard Seltzer	389
Bud Light Seltzer	415
Smirnoff Seltzer	371