

BESPOKE SURVEYS

CPGs, Energy Drinks, and Hard Seltzer Vol 16

1,250+ US Consumers, Balanced to Census

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

- Respondents are not having much trouble with inventory outages. Commentary around toilet paper, paper towels, cleaners, and hand sanitizers has improved over the last several quarters.
- Though consumers still feel they are keeping more inventory of groceries and personal care items on hand than normal, the share of respondents reporting the latter has declined sequentially.
- Price has become more important y/y in the eyes of consumers even as quality remains the most important factor when making purchases.

ENERGY DRINK TRENDS

- Energy drink consumption has trended flat to up sequentially. Red Bull and Monster continue to have the highest unaided awareness. Monster and Red Bull NPS are roughly in-line with one another.
- Price has grown in importance on the energy drinks front.

HARD SELTZER TRENDS

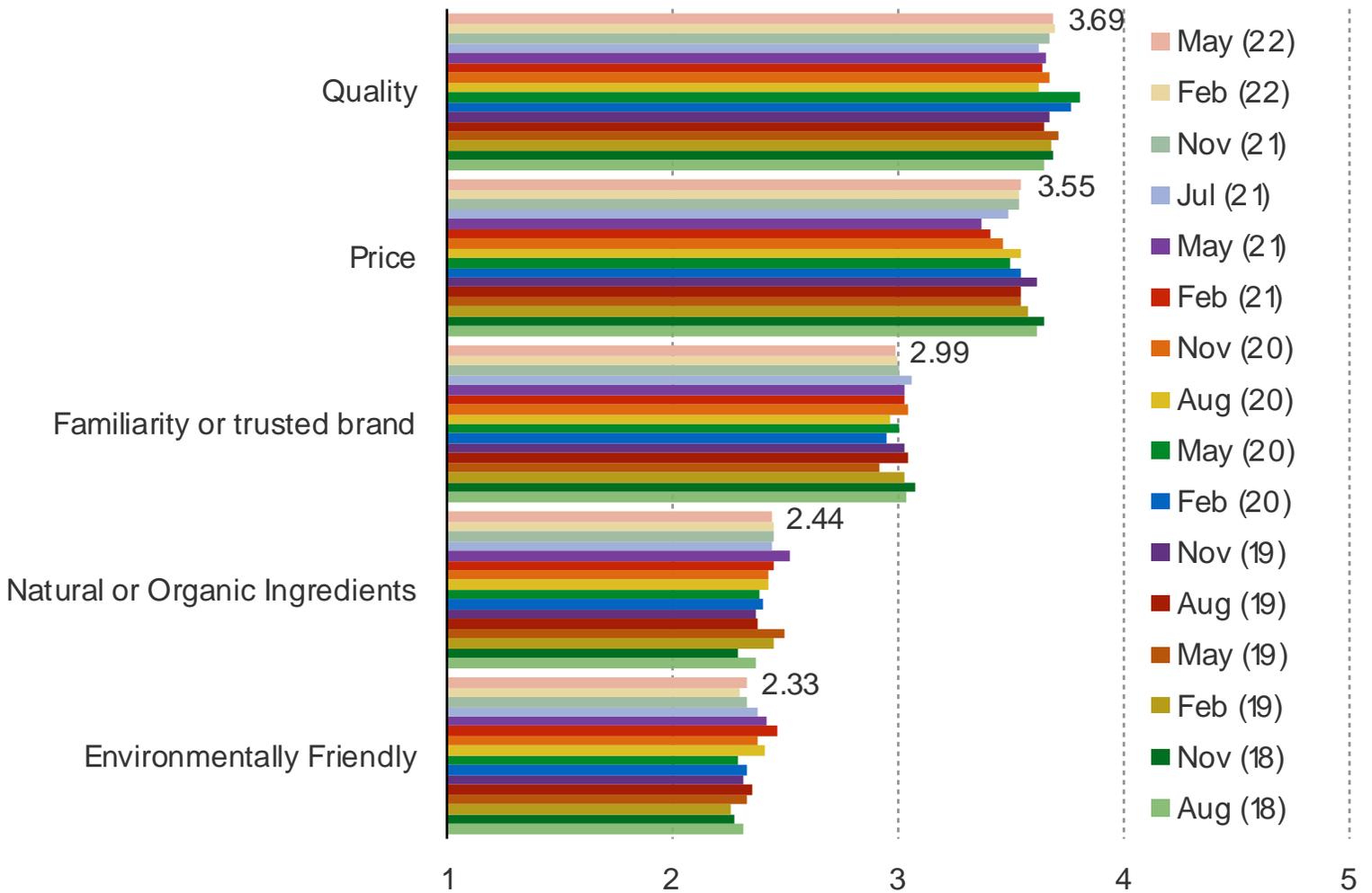
The share of alcohol consumption that goes to hard seltzer among consumers who have consumed hard seltzer has declined over the past year (sequentially and relative to results one year ago in May of 2021).

Davids vs. Goliaths

CPGS OVERALL

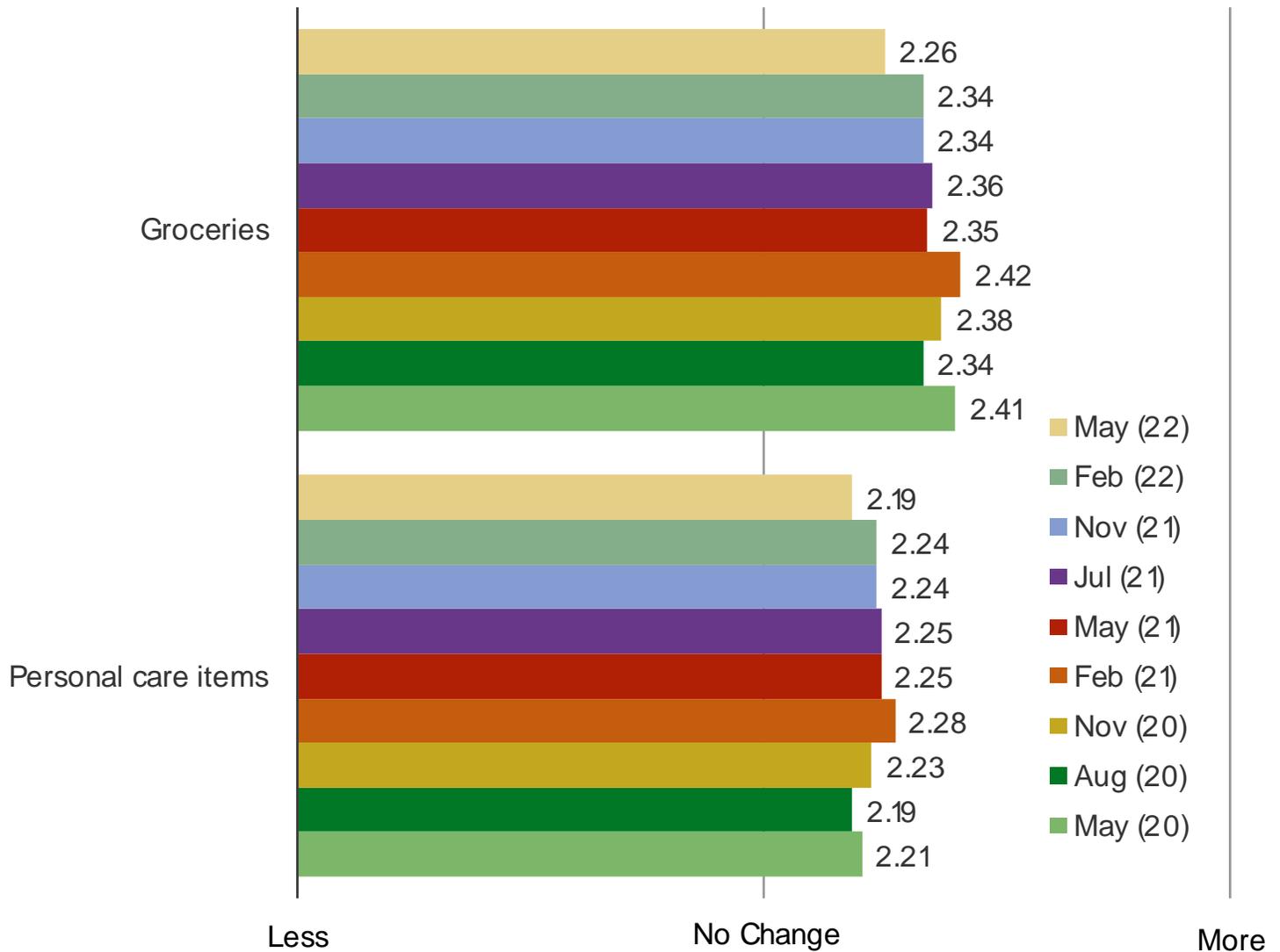
PLEASE RANK WHICH ARE MOST IMPORTANT TO YOU WHEN IT COMES TO PURCHASING PERSONAL CARE AND HOUSEHOLD ITEMS.

Posed to all respondents



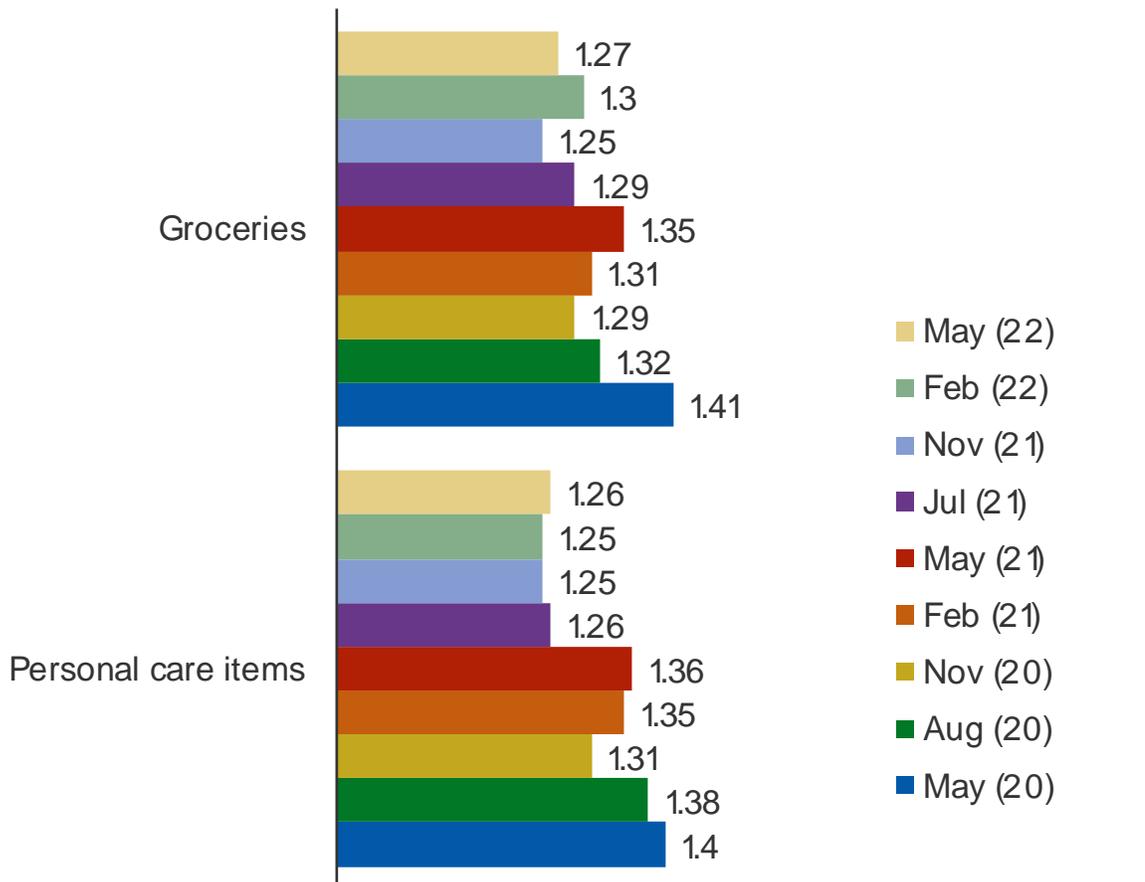
WHEN IT COMES TO BOTH PERSONAL CARE ITEMS AND GROCERIES, ARE YOU KEEPING MORE OR LESS INVENTORY IN YOUR HOME LATELY?

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

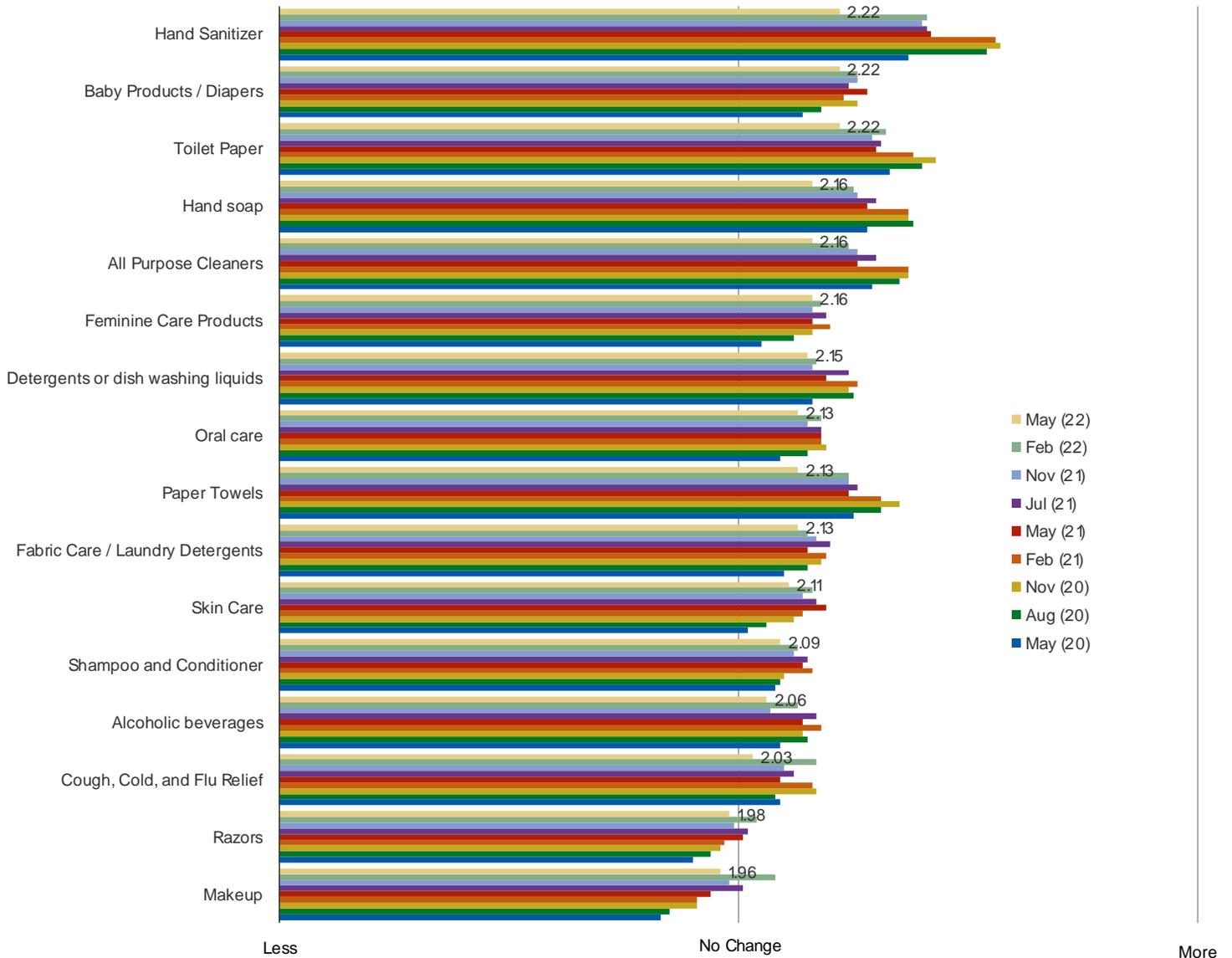


We will continue to keep higher than normal inventory going forward

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

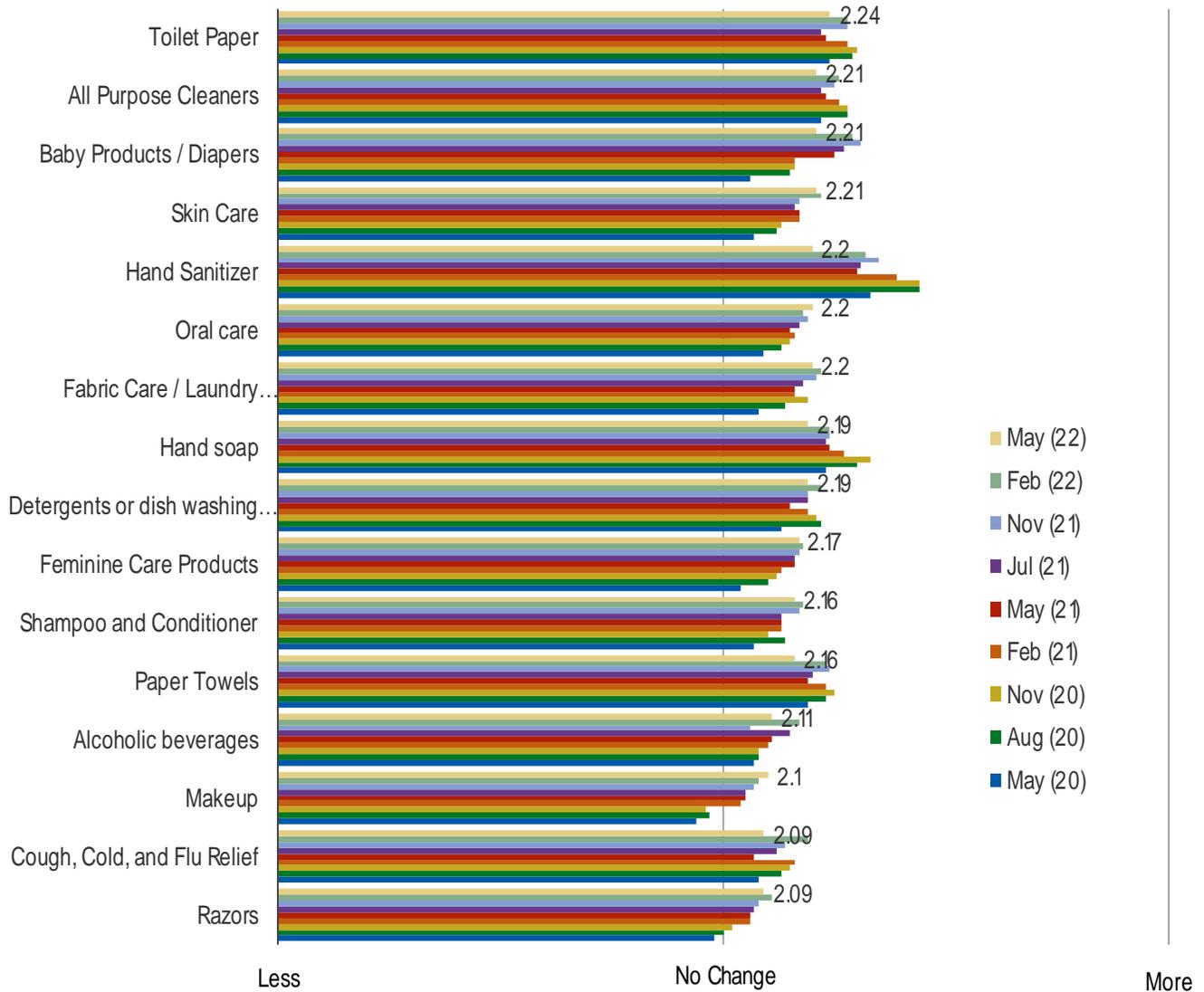
HAVE YOU RECENTLY CHANGED YOUR SPENDING ON THE FOLLOWING ITEMS YOU TYPICALLY SHOP FOR?

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



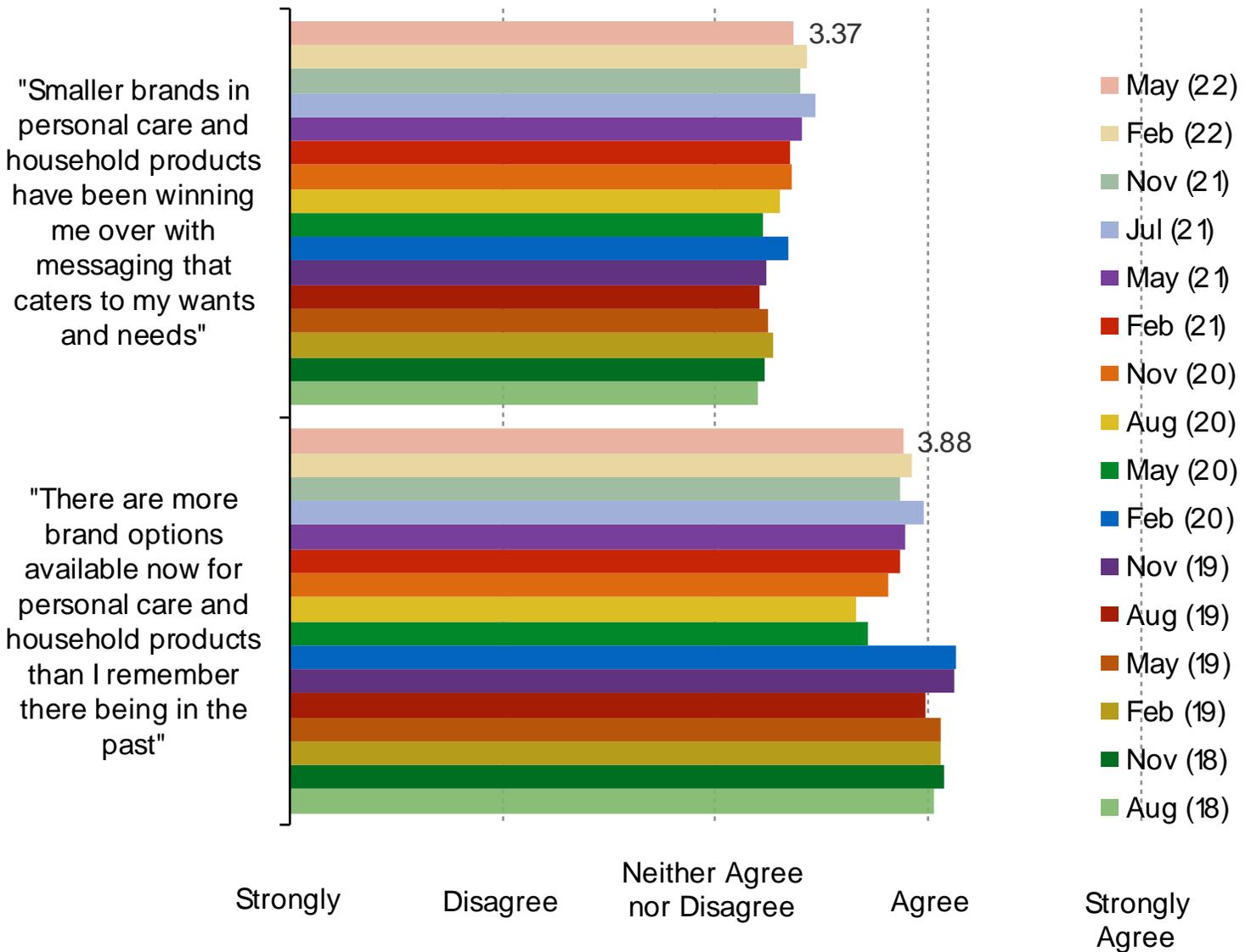
GOING FORWARD, TO YOU EXPECT TO SPEND MORE OR LESS THAN NORMAL ON THE FOLLOWING PRODUCTS?

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



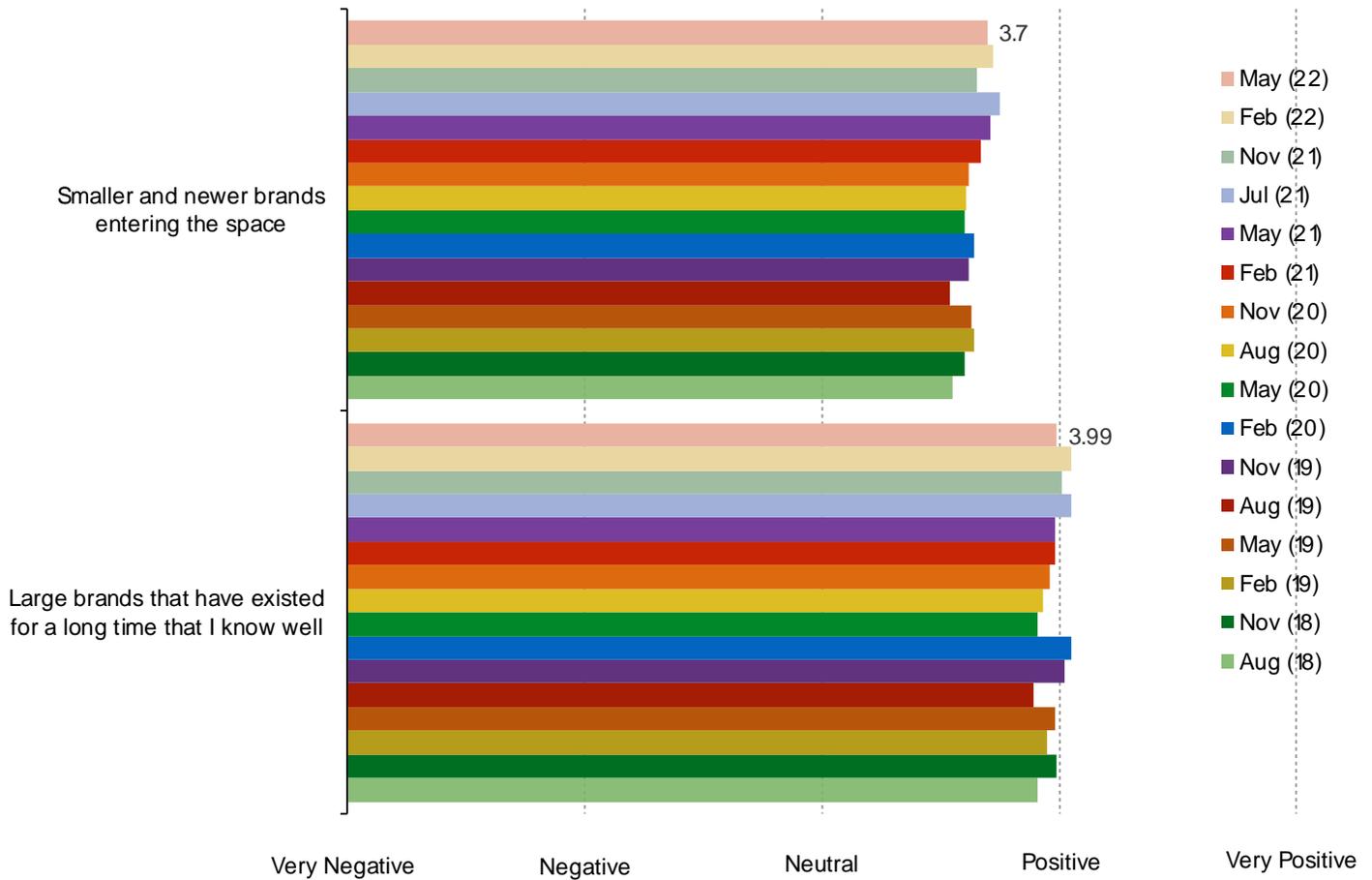
HOW MUCH DO YOU AGREE WITH THE FOLLOWING STATEMENTS?

Posed to all respondents



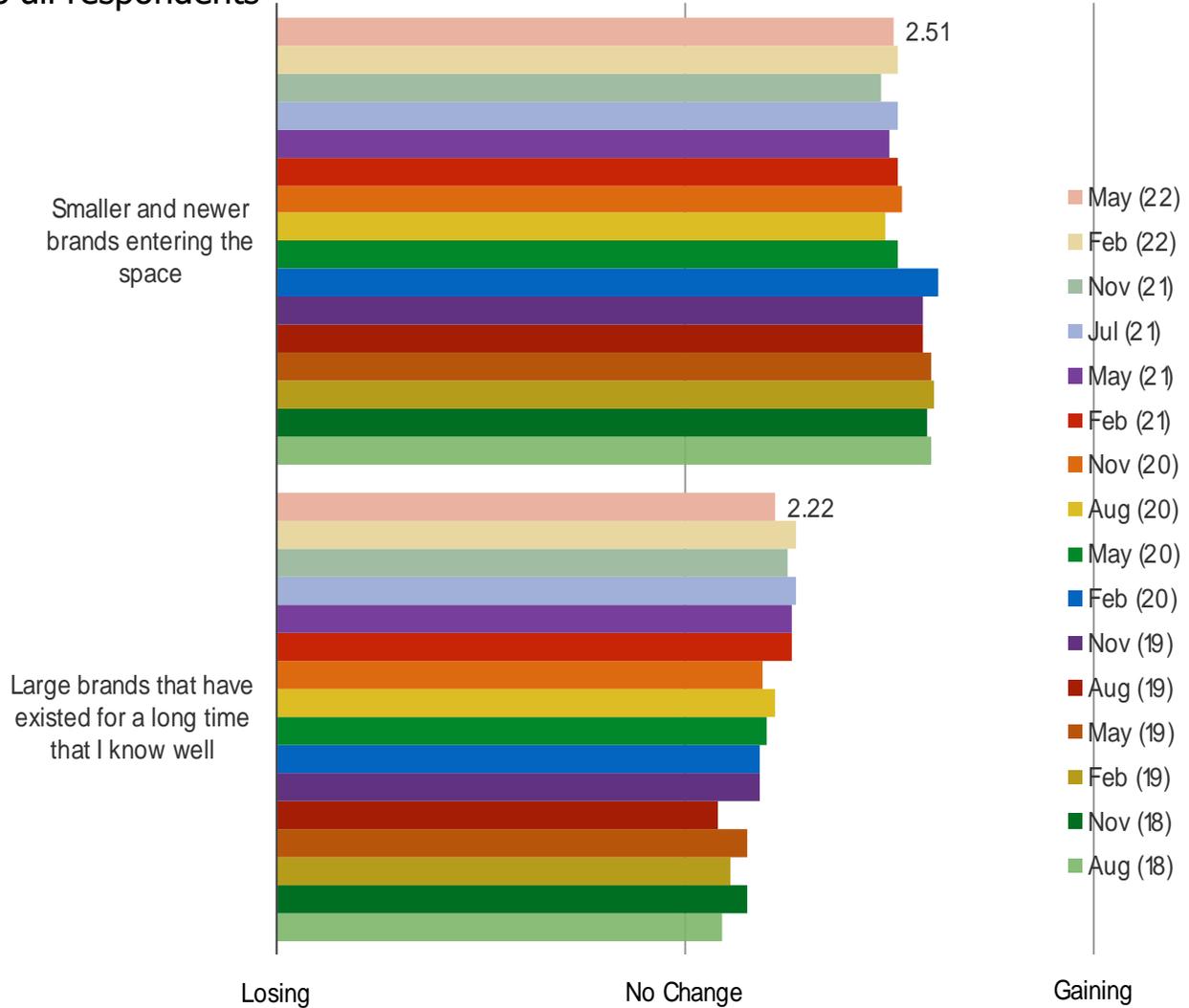
WHEN IT COMES TO HOUSEHOLD AND PERSONAL CARE PRODUCTS, WHAT IS YOUR OPINION OF THE FOLLOWING?

Posed to all respondents



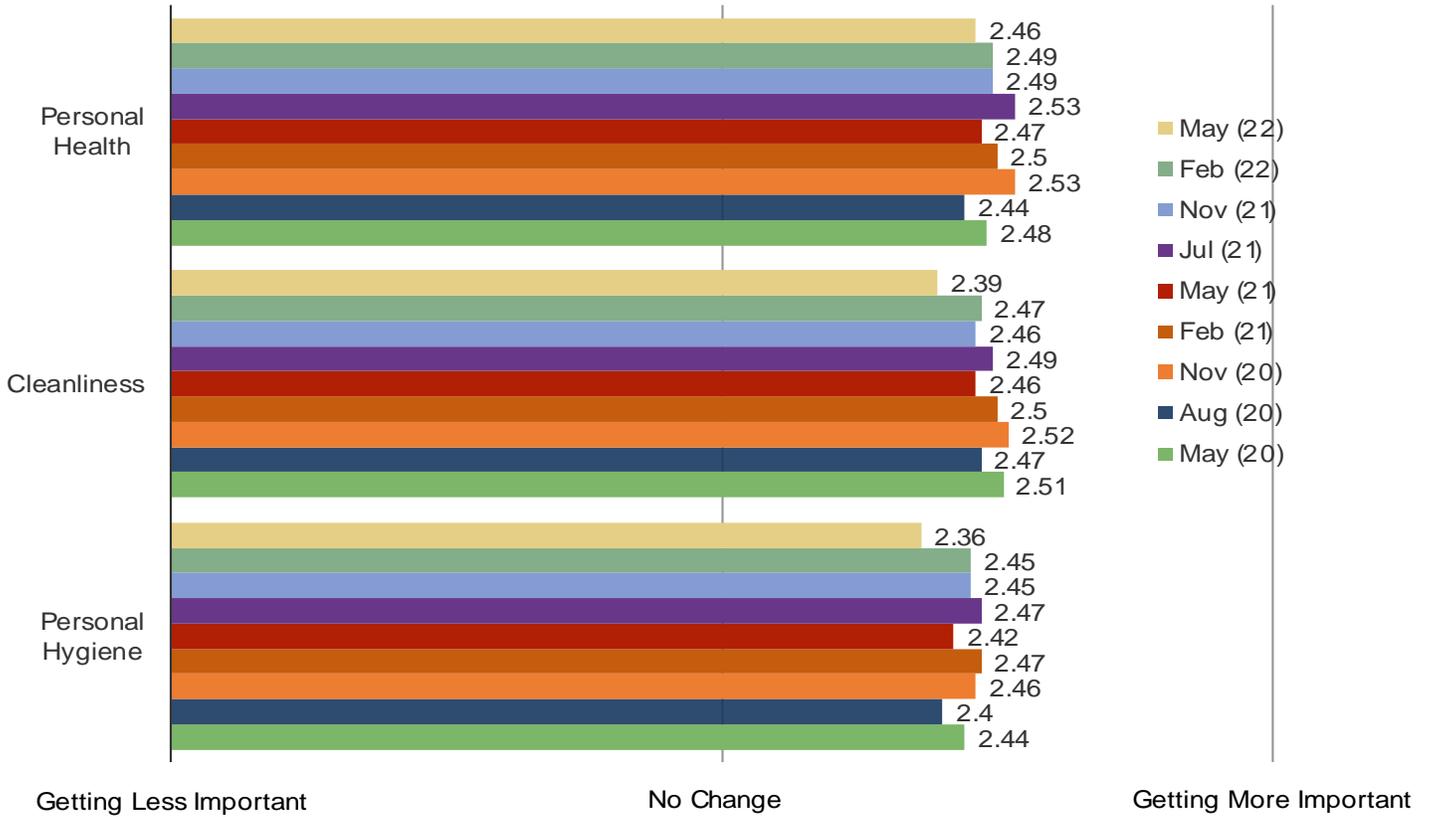
WHEN IT COMES TO HOUSEHOLD AND PERSONAL CARE PRODUCTS, DO YOU FEEL THE FOLLOWING ARE GAINING OR LOSING POPULARITY?

Posed to all respondents



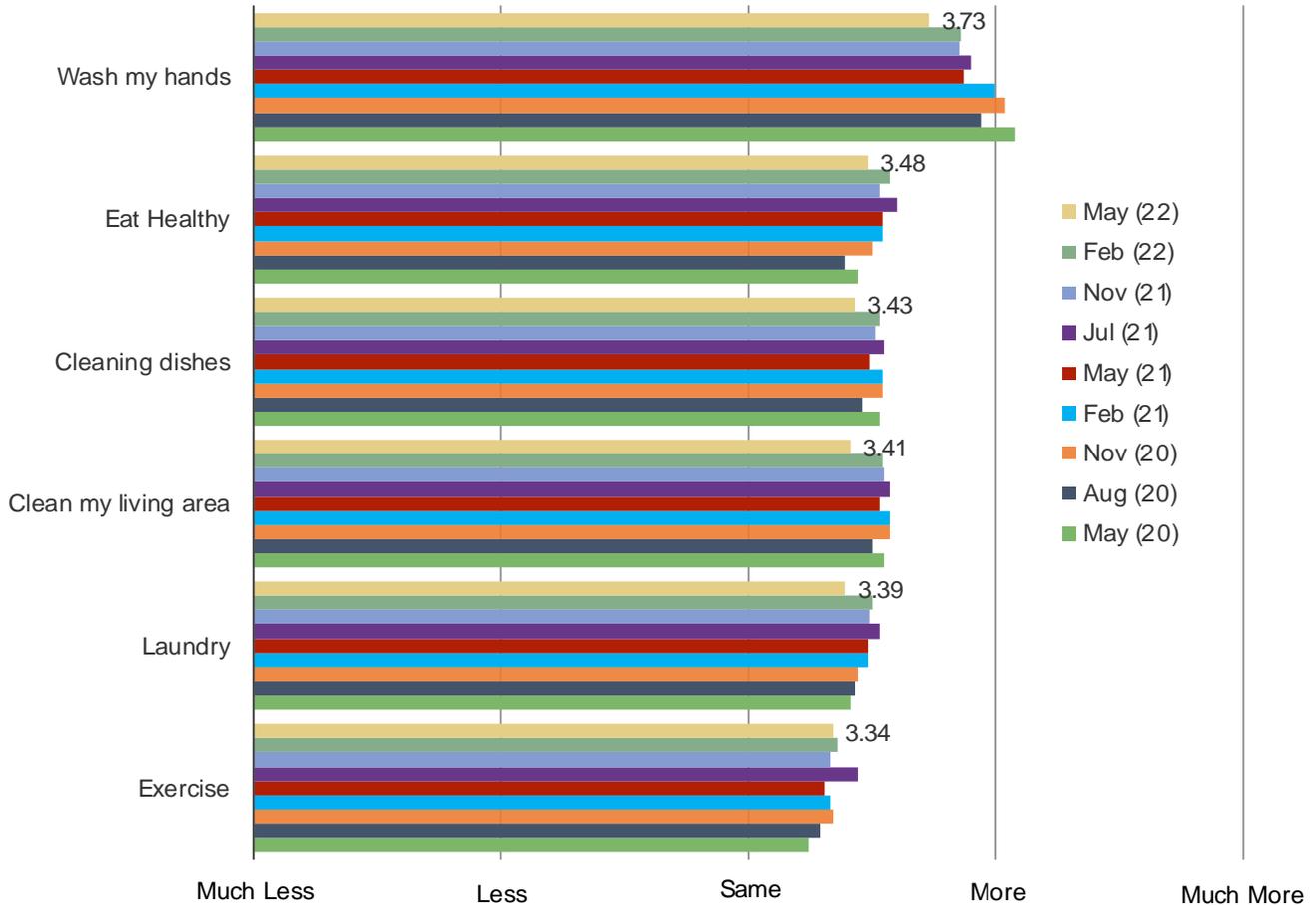
ARE THE FOLLOWING CURRENTLY GETTING MORE OR LESS IMPORTANT TO YOU?

Posed to all respondents.



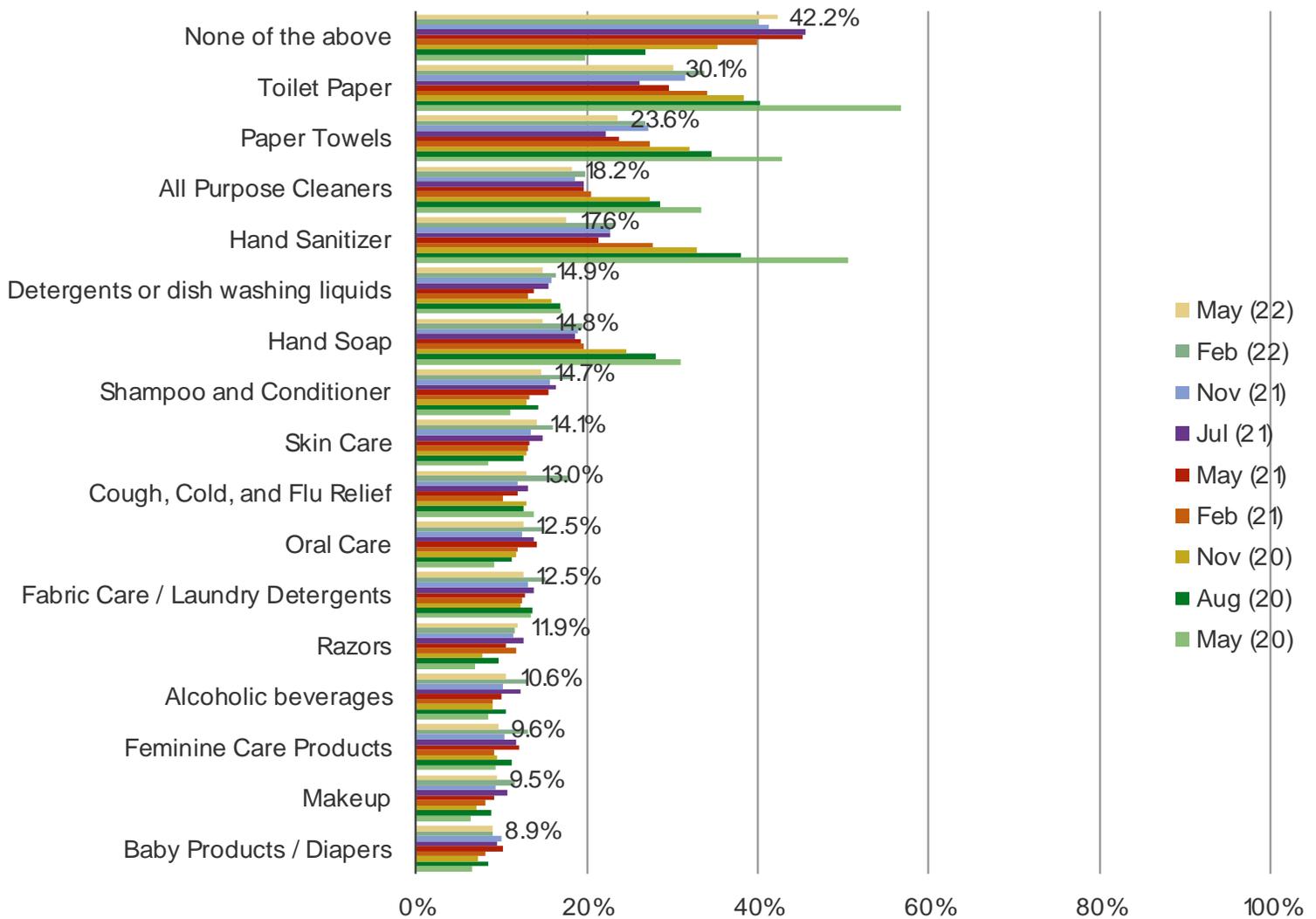
HAVE YOU RECENTLY CHANGED HOW OFTEN YOU DO THE FOLLOWING?

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.

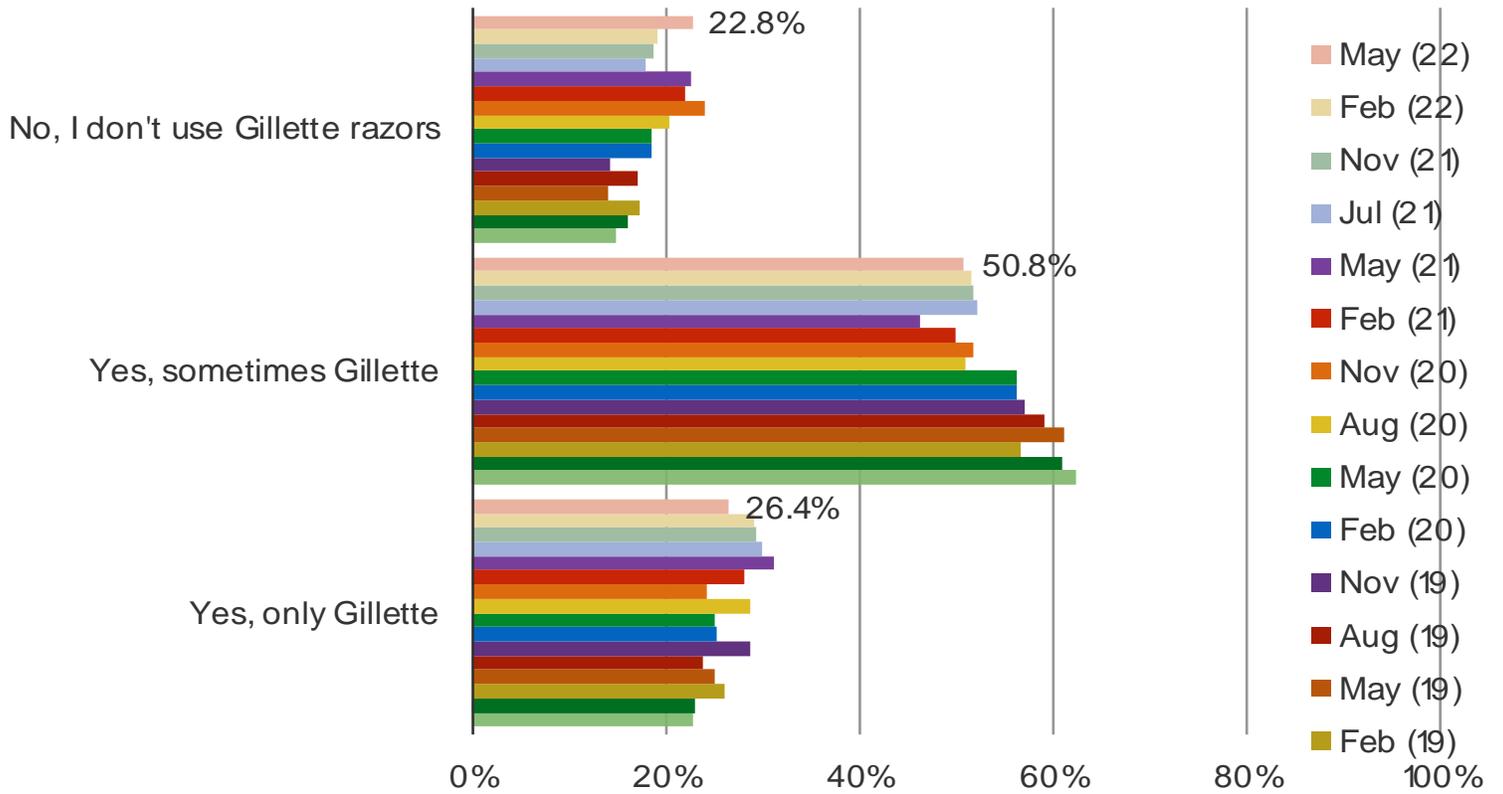


Davids vs. Goliaths

GILLETTE

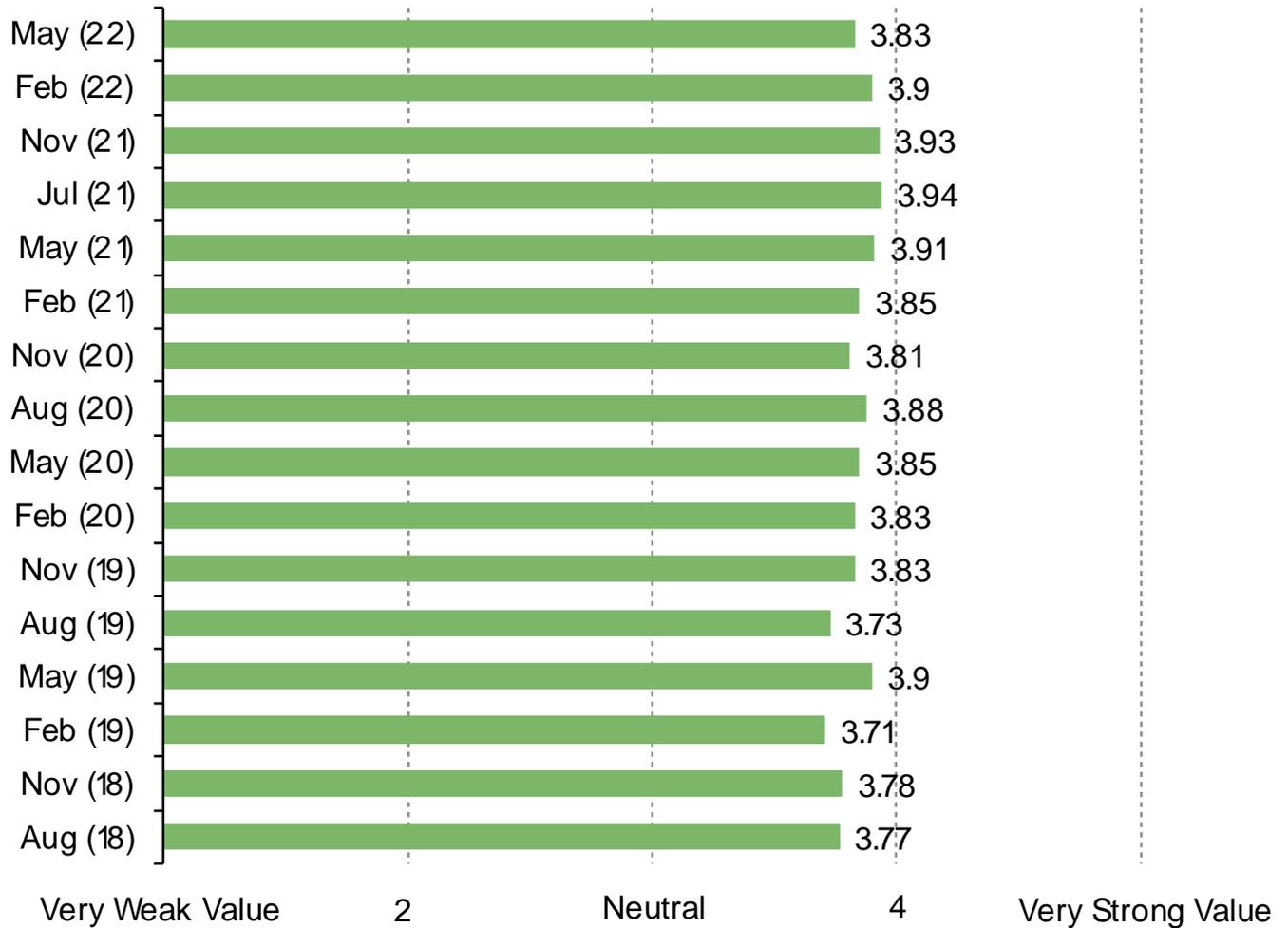
DO YOU USE GILLETTE RAZORS?

Posed to respondents who make purchase decisions on razors



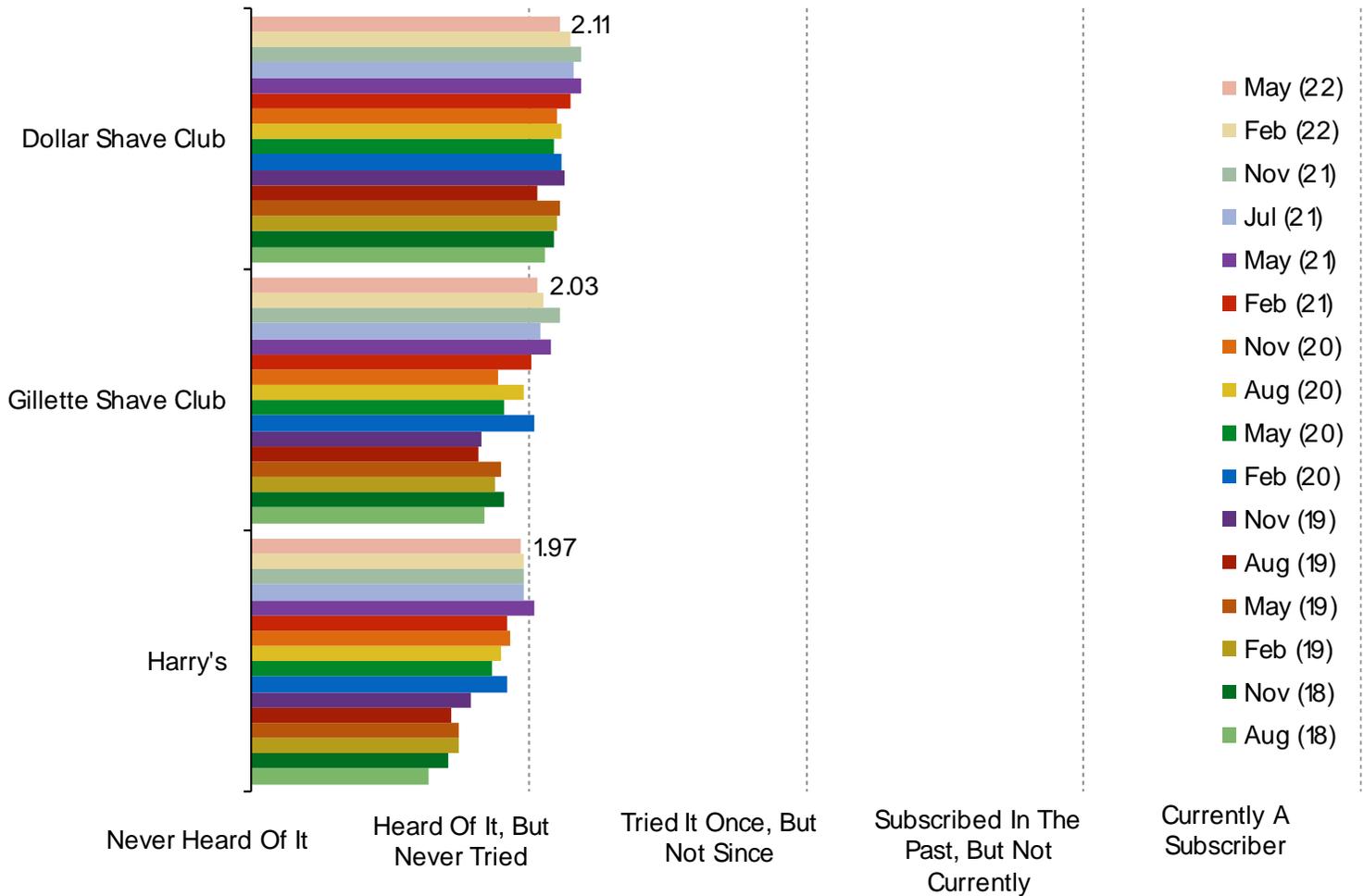
WHAT IS YOUR OPINION OF THE VALUE GILLETTE RAZORS OFFERS FOR THE PRICE?

Posed to respondents who make purchase decisions on razors



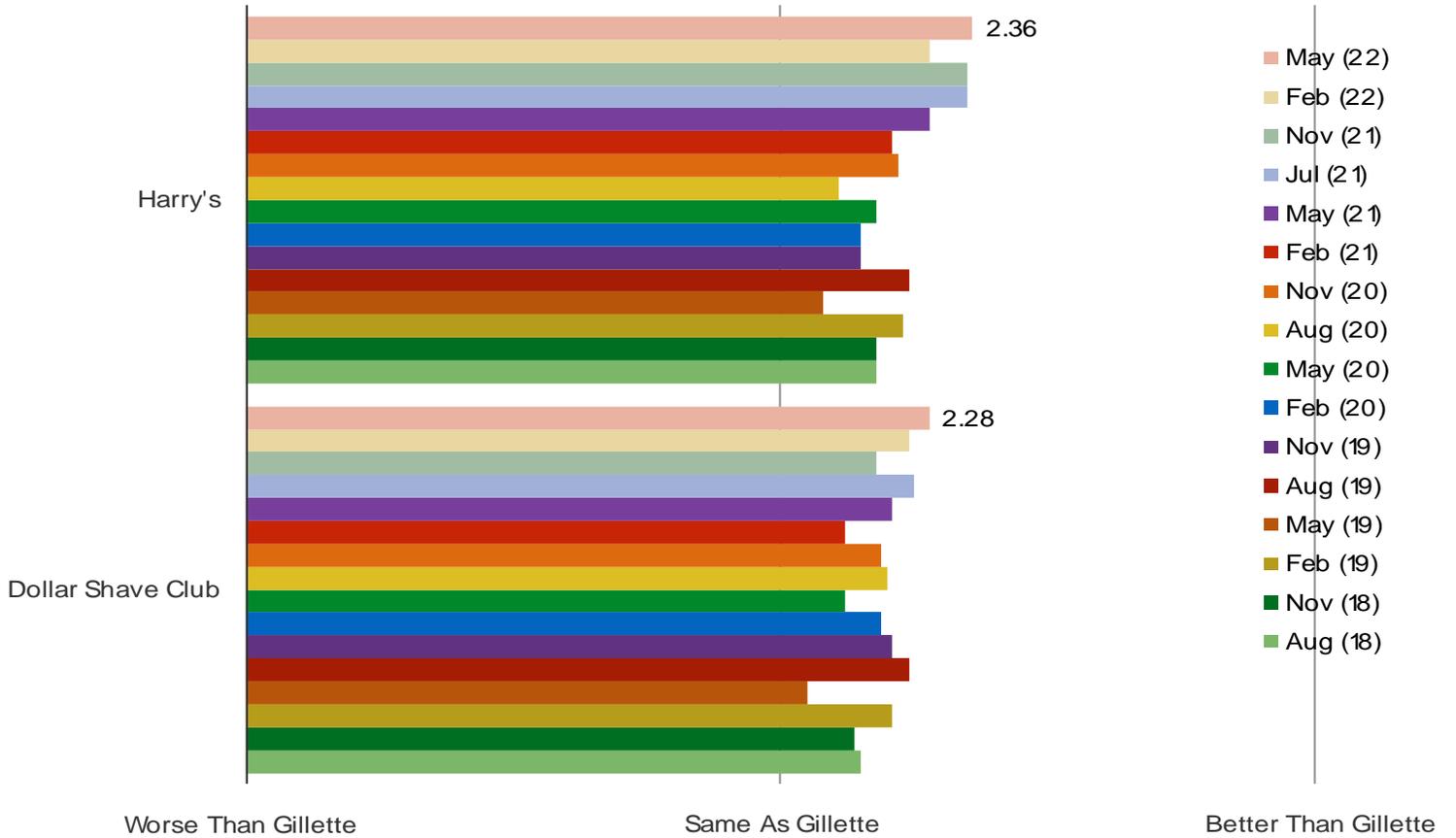
WHAT IS YOUR EXPERIENCE WITH THE FOLLOWING SHAVE CLUBS?

Posed to respondents who make purchase decisions on razors



WHAT IS YOUR OPINION OF THE FOLLOWING?

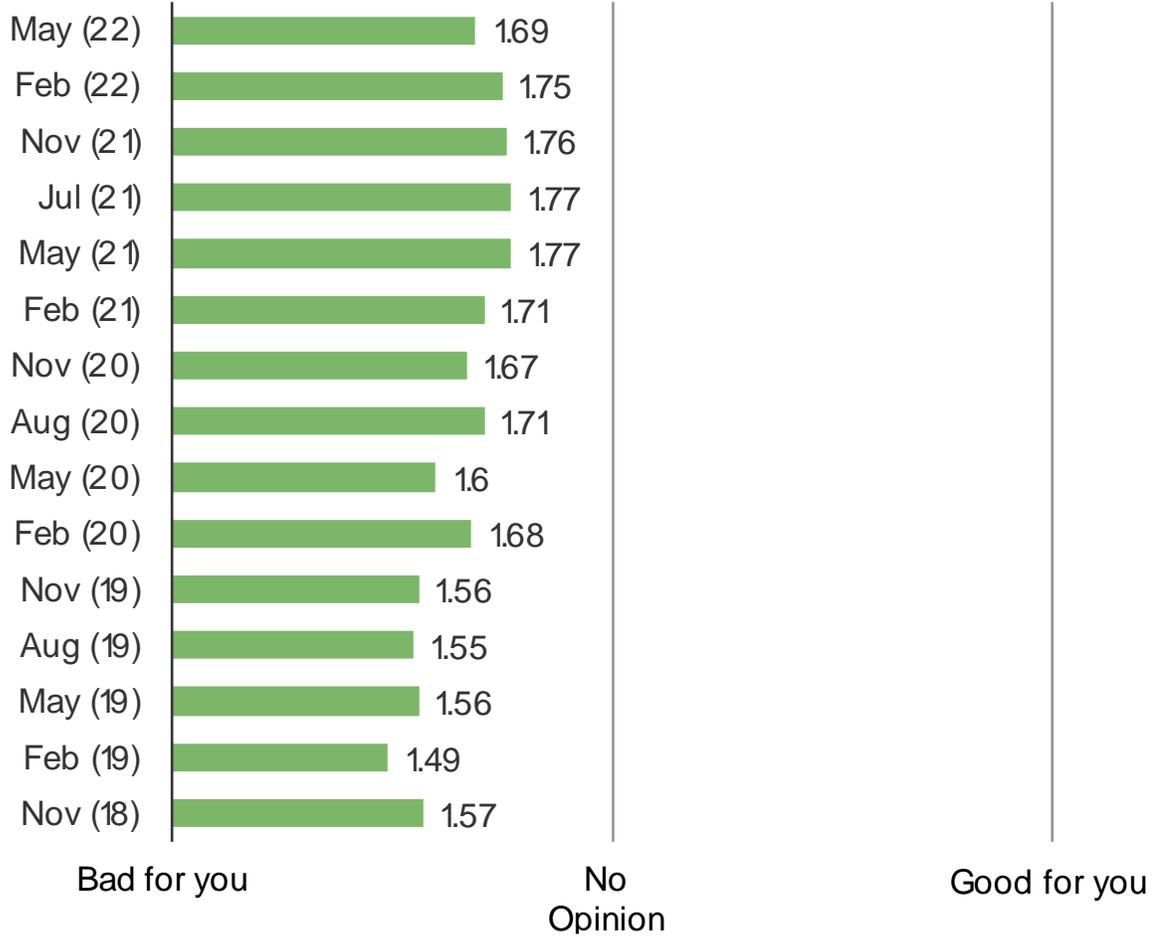
Posed to respondents who have at least tried Harry's and/or Dollar Shave Club



SODA AND ENERGY DRINKS

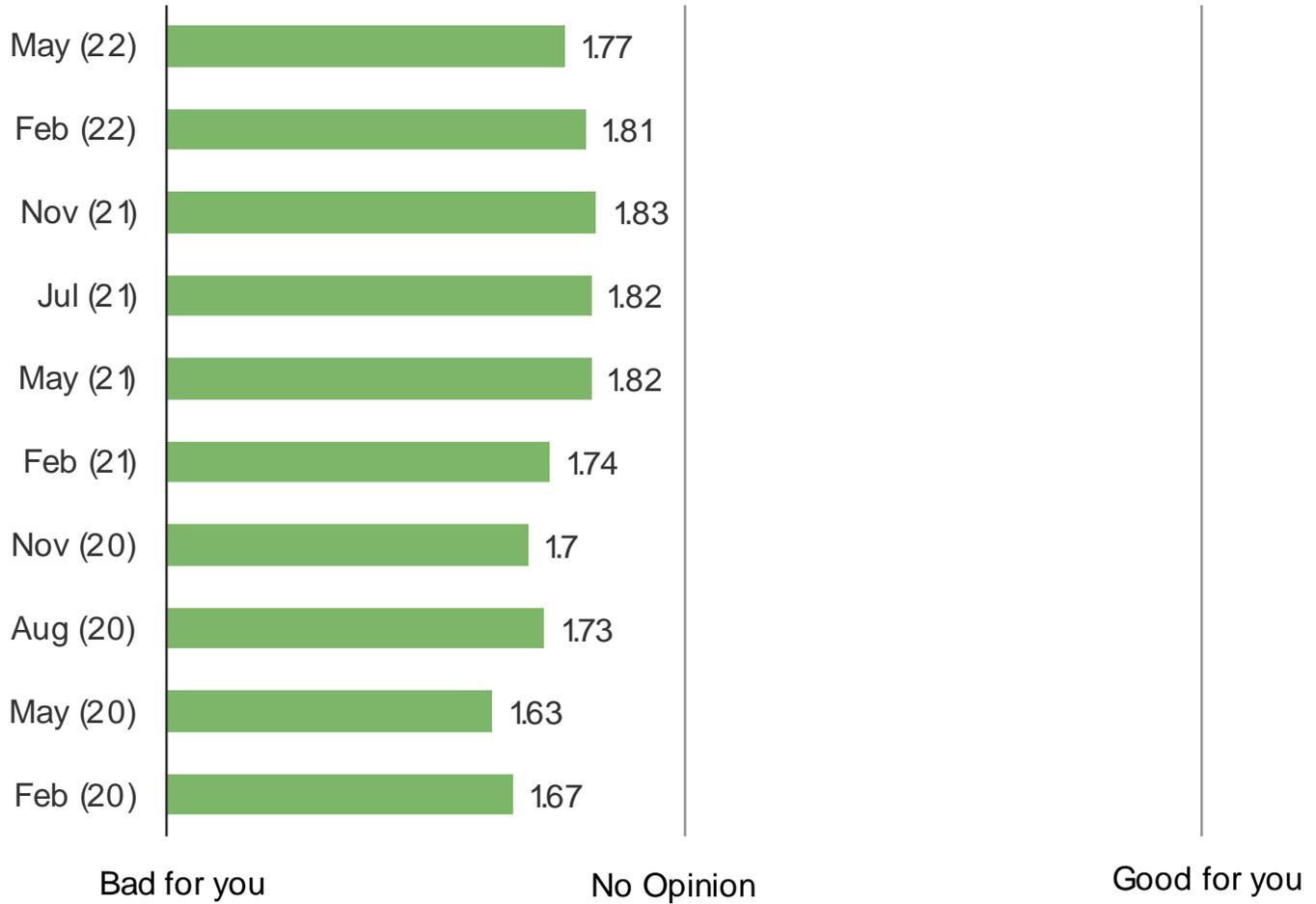
IN YOUR OPINION, IS SODA...

Posed to all respondents



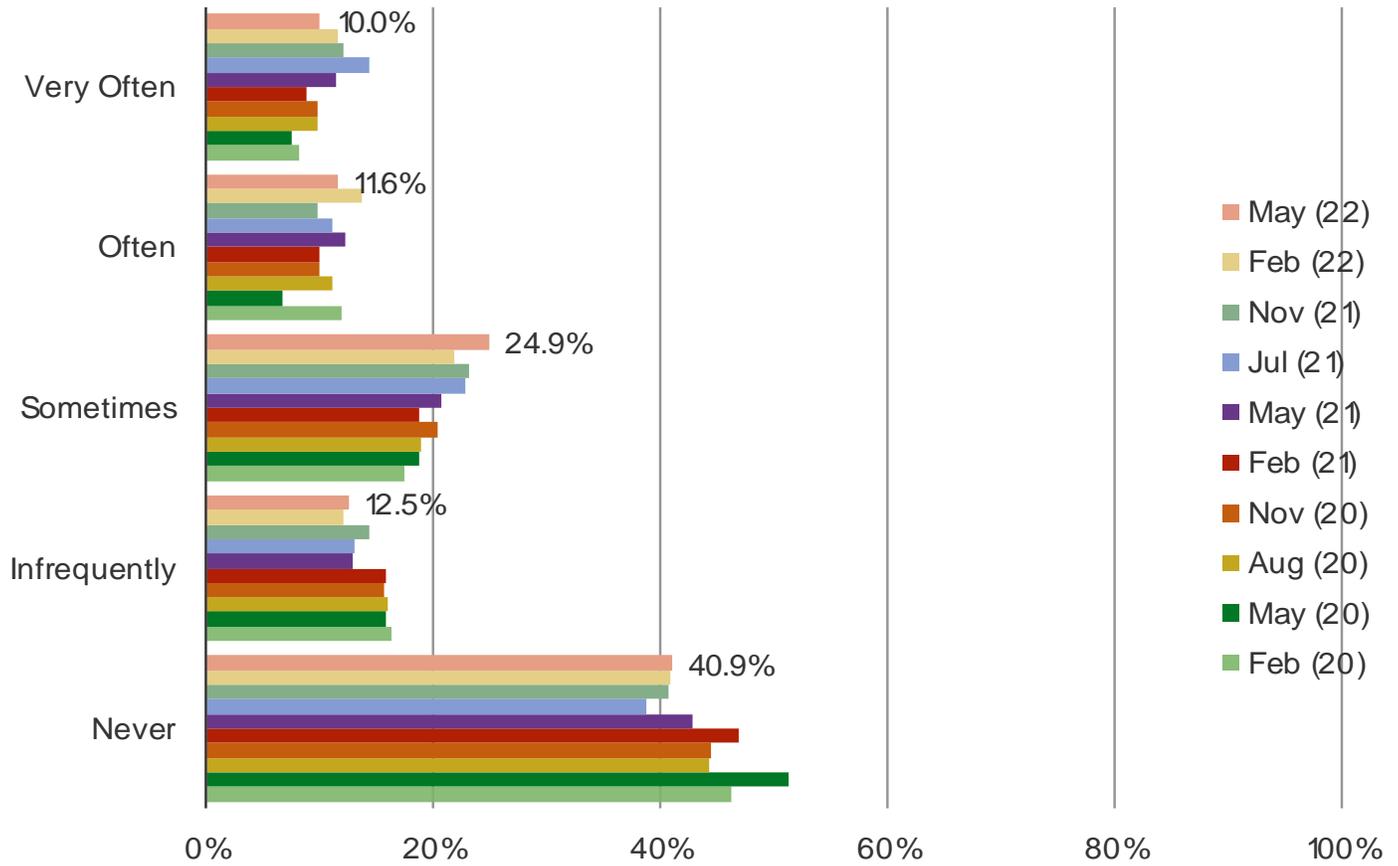
IN YOUR OPINION, ARE ENERGY DRINKS...

Posed to all respondents



DO YOU CONSUME ENERGY DRINKS?

Posed to all respondents



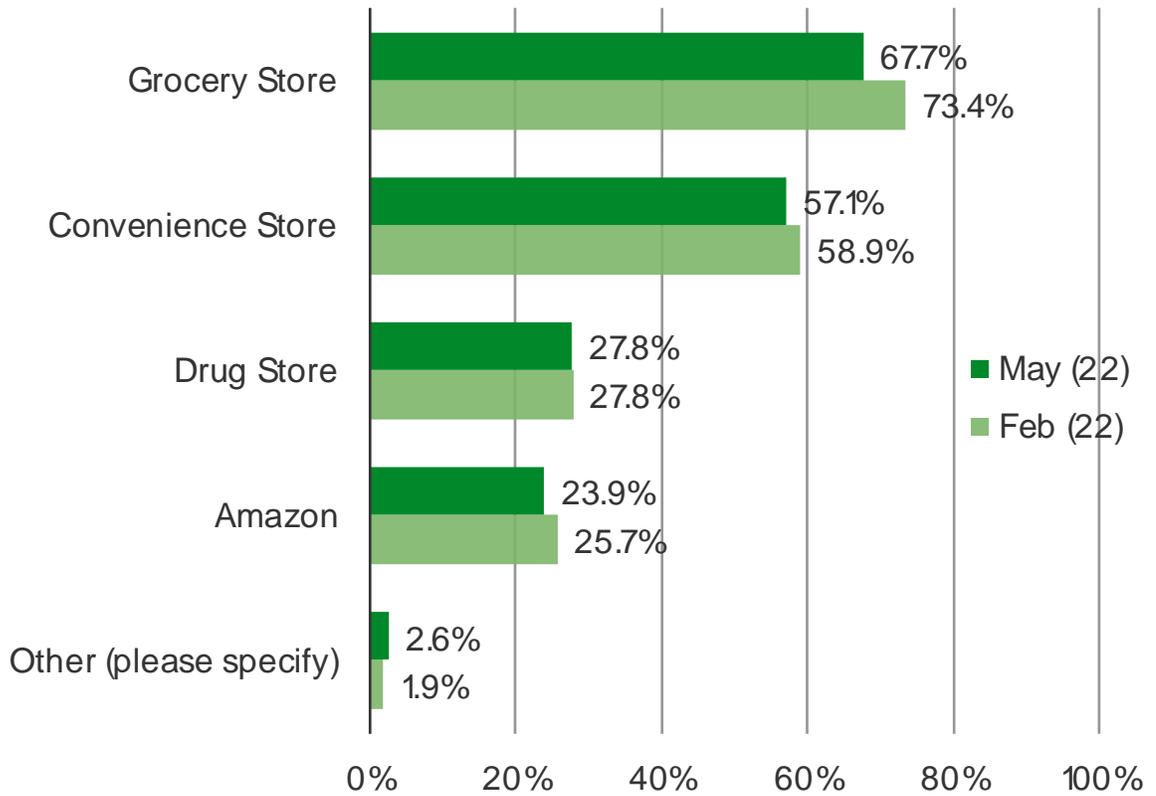
WHEN YOU THINK OF ENERGY DRINKS, WHICH BRAND COMES TO MIND FIRST?

Posed to all respondents who drink energy drinks at least infrequently (N = 641).



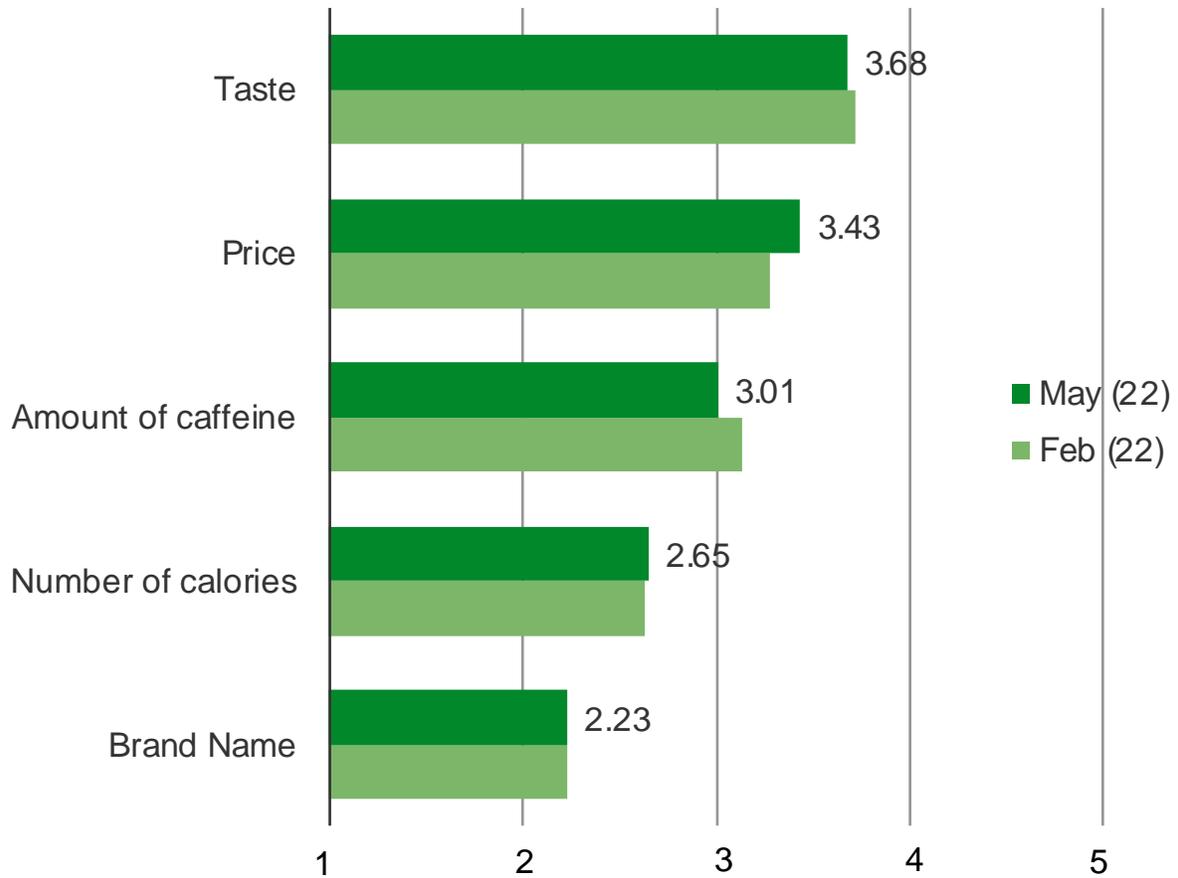
WHERE DO YOU BUY ENERGY DRINKS? (SELECT ALL THAT APPLY)

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



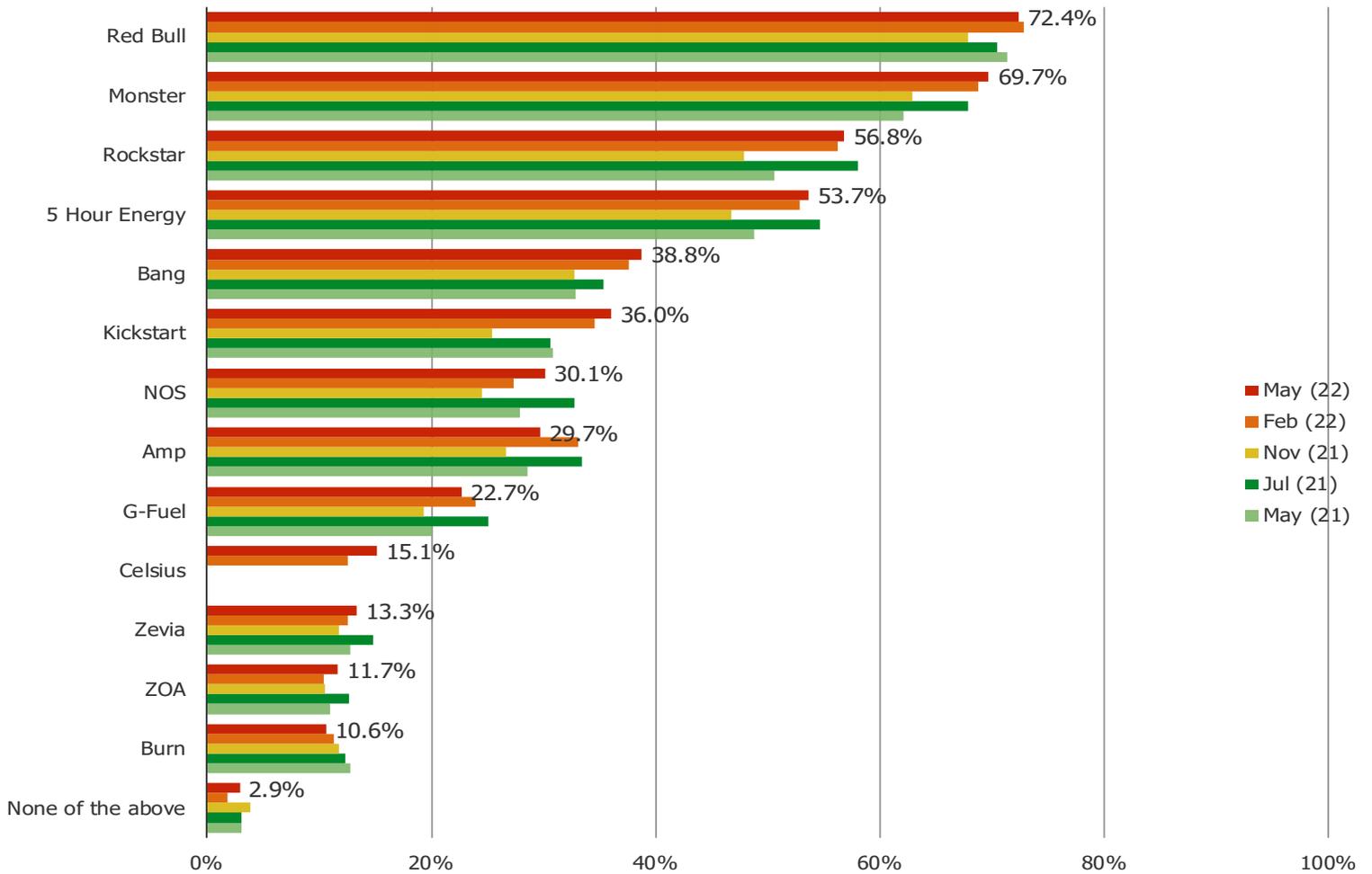
PLEASE RANK WHAT YOU VALUE IN ENERGY DRINKS, FROM MOST AT THE TOP TO LEAST AT THE BOTTOM.

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



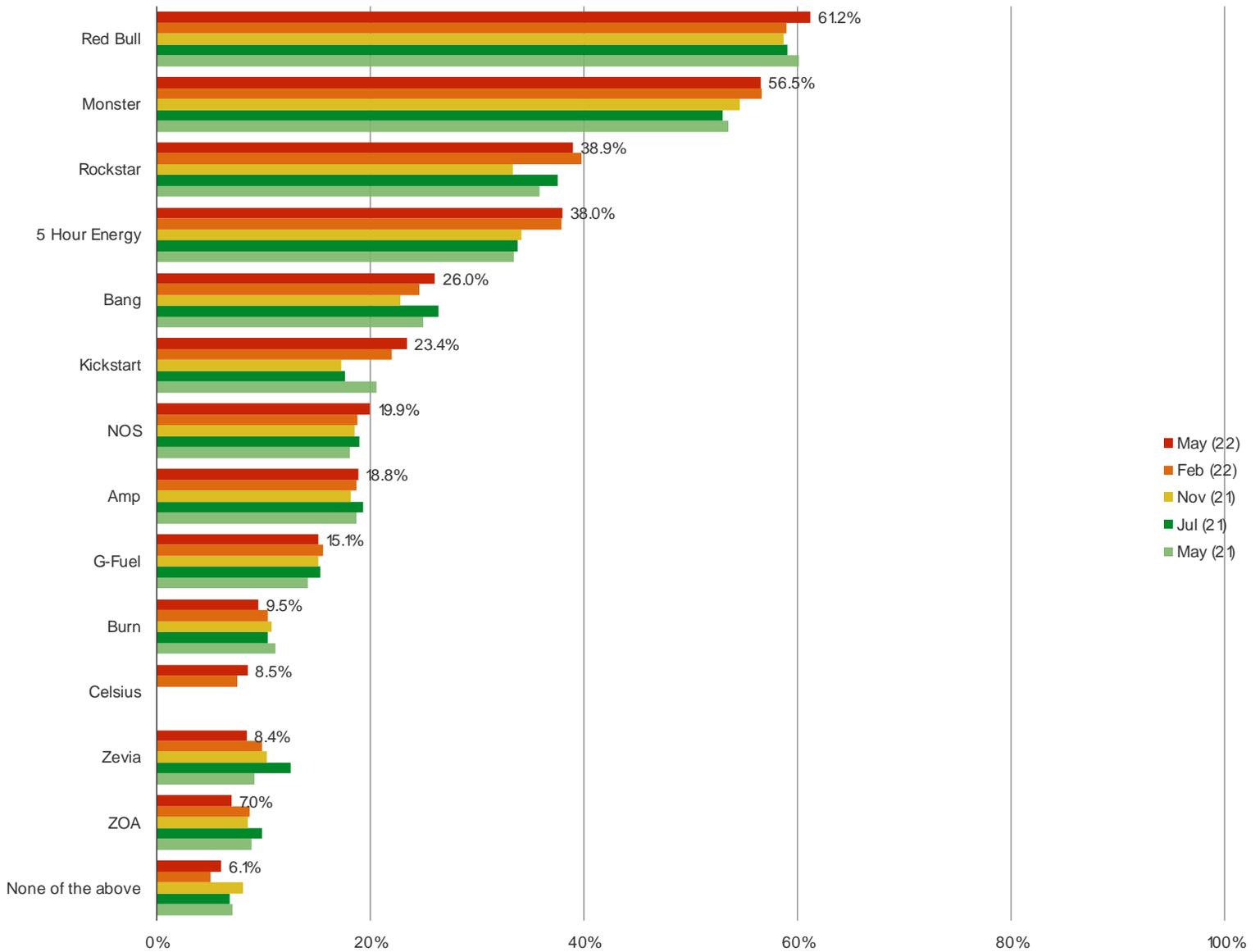
HAVE YOU HEARD OF ANY OF THE FOLLOWING ENERGY DRINK BRANDS? SELECT ALL THAT APPLY

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



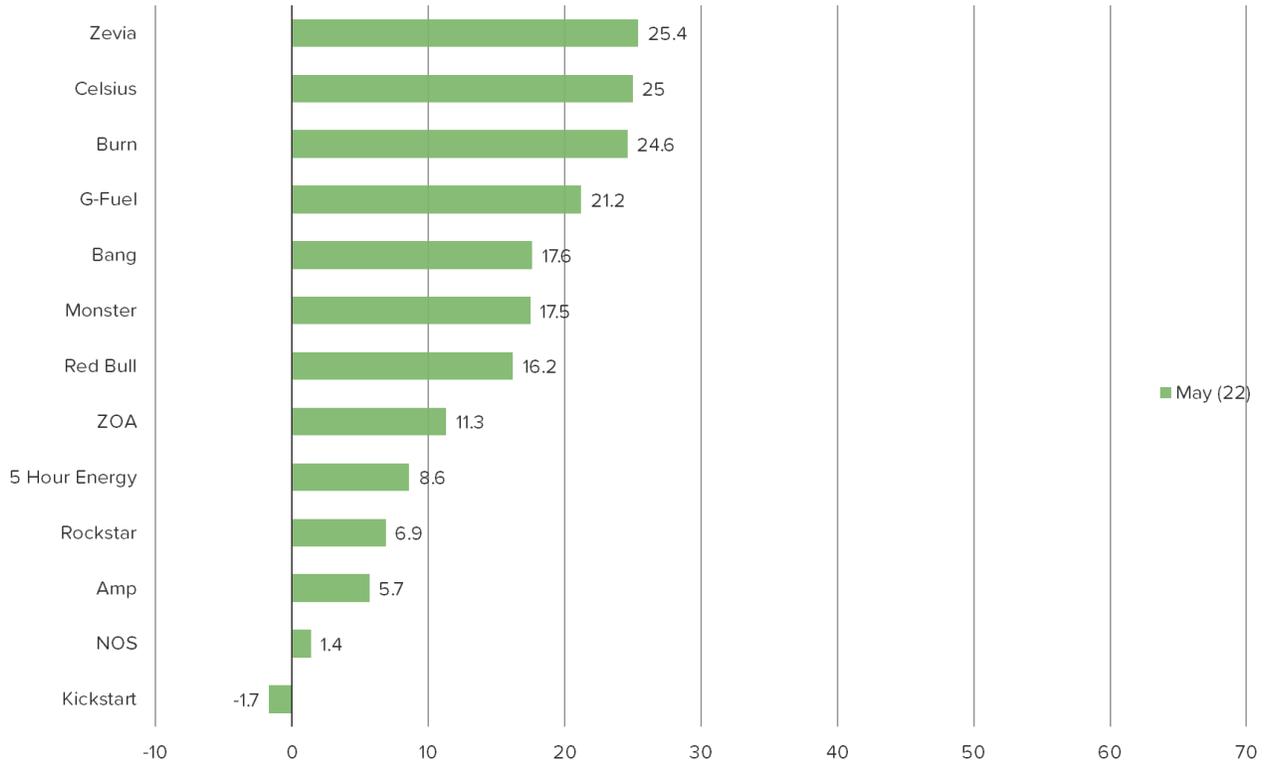
HAVE YOU EVER HAD/DRANK ENERGY DRINKS FROM ANY OF THE FOLLOWING BRANDS? SELECT ALL THAT APPLY

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?

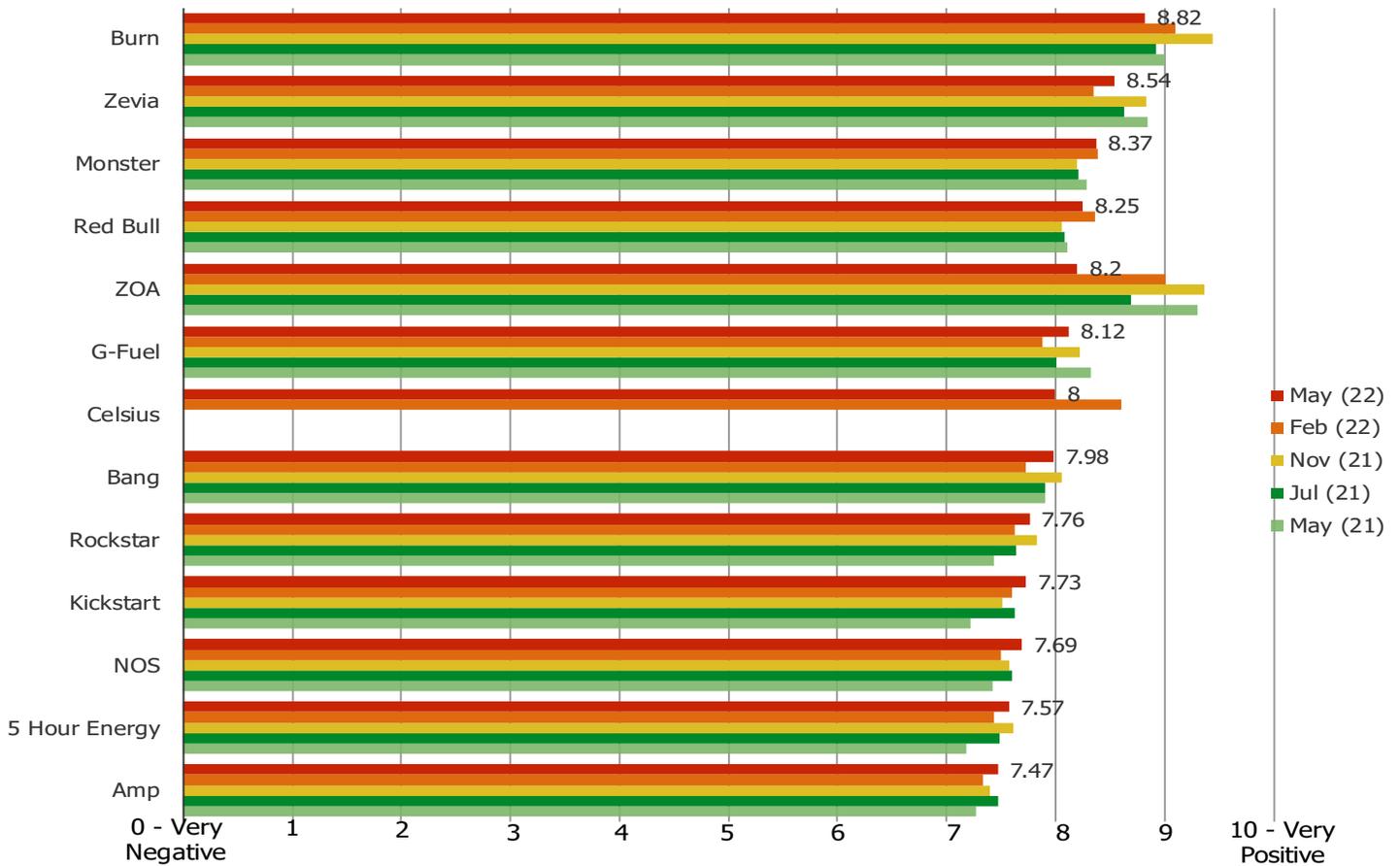
Posed to all respondents who drink the below energy drink brands.



	N=
Red Bull	452
Monster	417
Rockstar	290
NOS	147
Burn	69
ZOA	53
G-Fuel	113
5 Hour Energy	279
Bang	193
Amp	140
Zevia	63
Kickstart	174
Celsius	64

WHAT IS YOUR OPINION OF THE FOLLOWING?

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

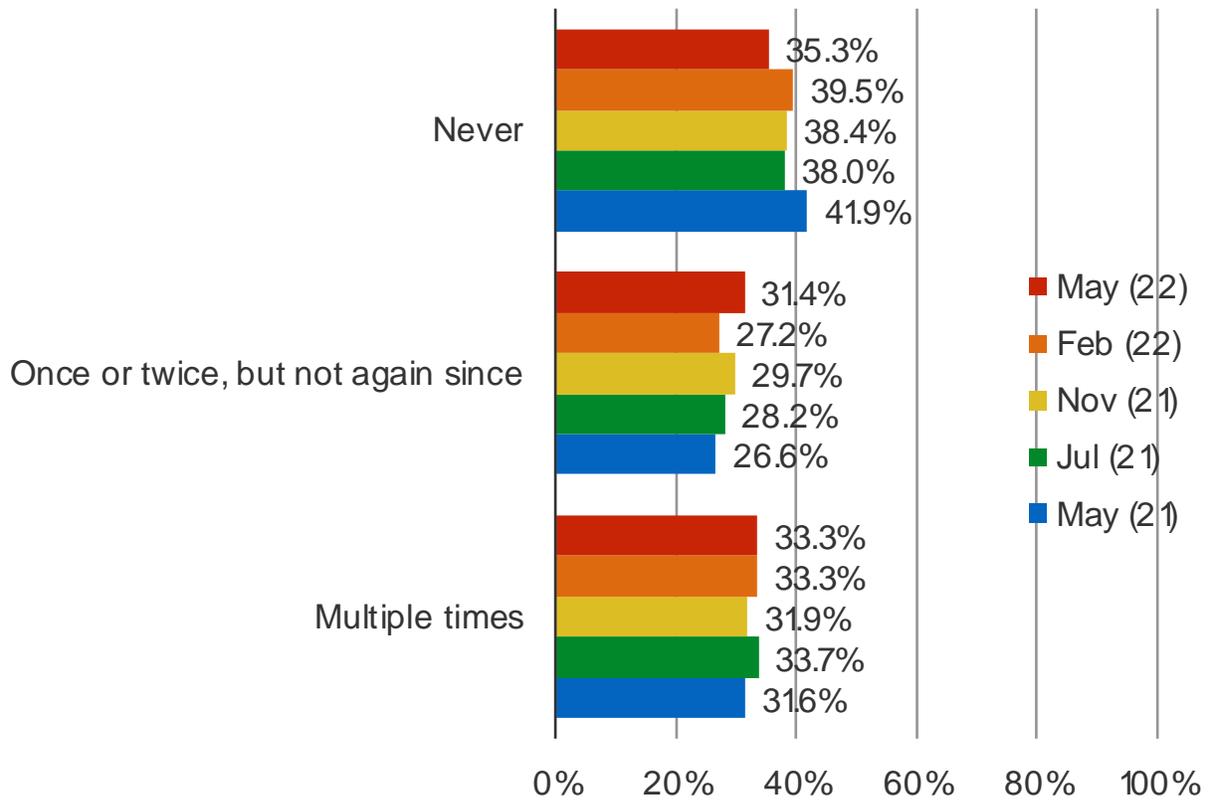


	N=
Red Bull	536
Monster	514
Rockstar	422
NOS	223
Burn	77
ZOA	86
G-Fuel	173
5 Hour Energy	396
Bang	292
Amp	221
Zevia	98
Kickstart	268
Celsius	113

HARD SELTZER

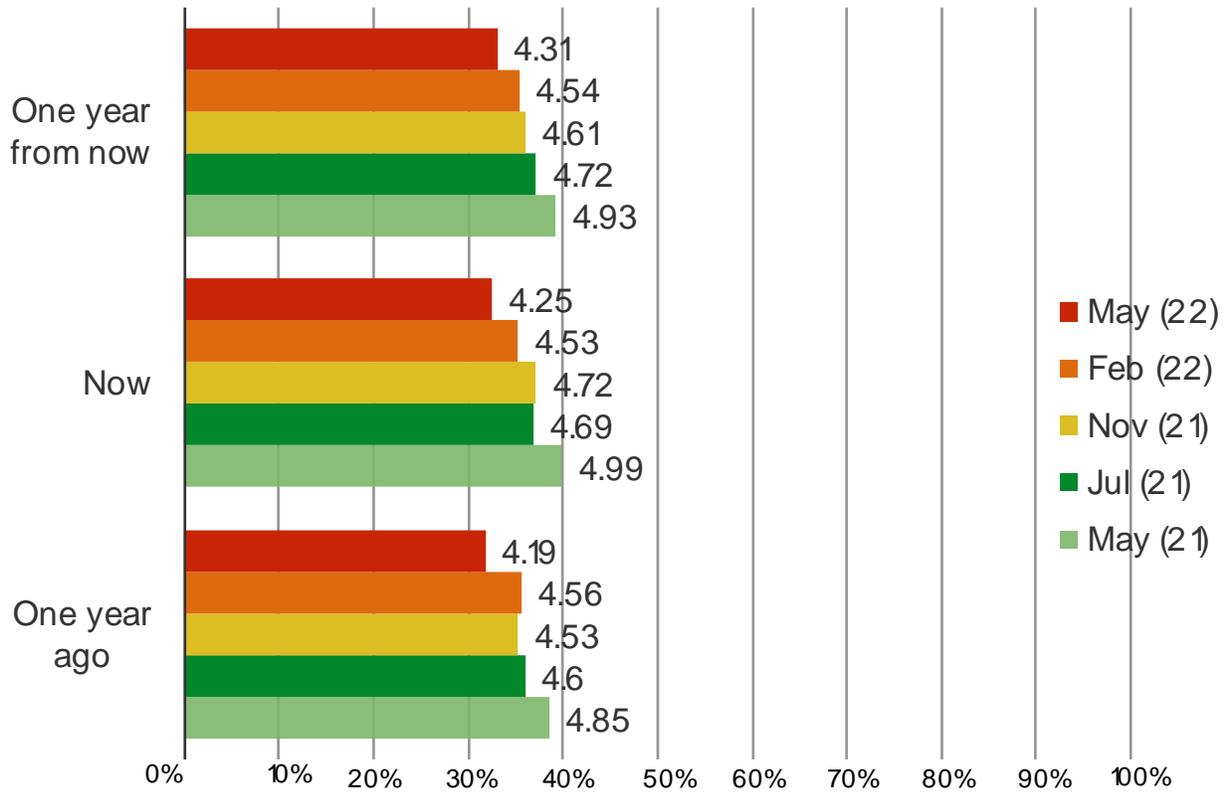
HAVE YOU EVER CONSUMED HARD SELTZER BEVERAGES? IE - CARBONATED WATER/SELTZER BEVERAGES WITH ALCOHOL IN IT.

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 = 569).

May 2022

February 2022



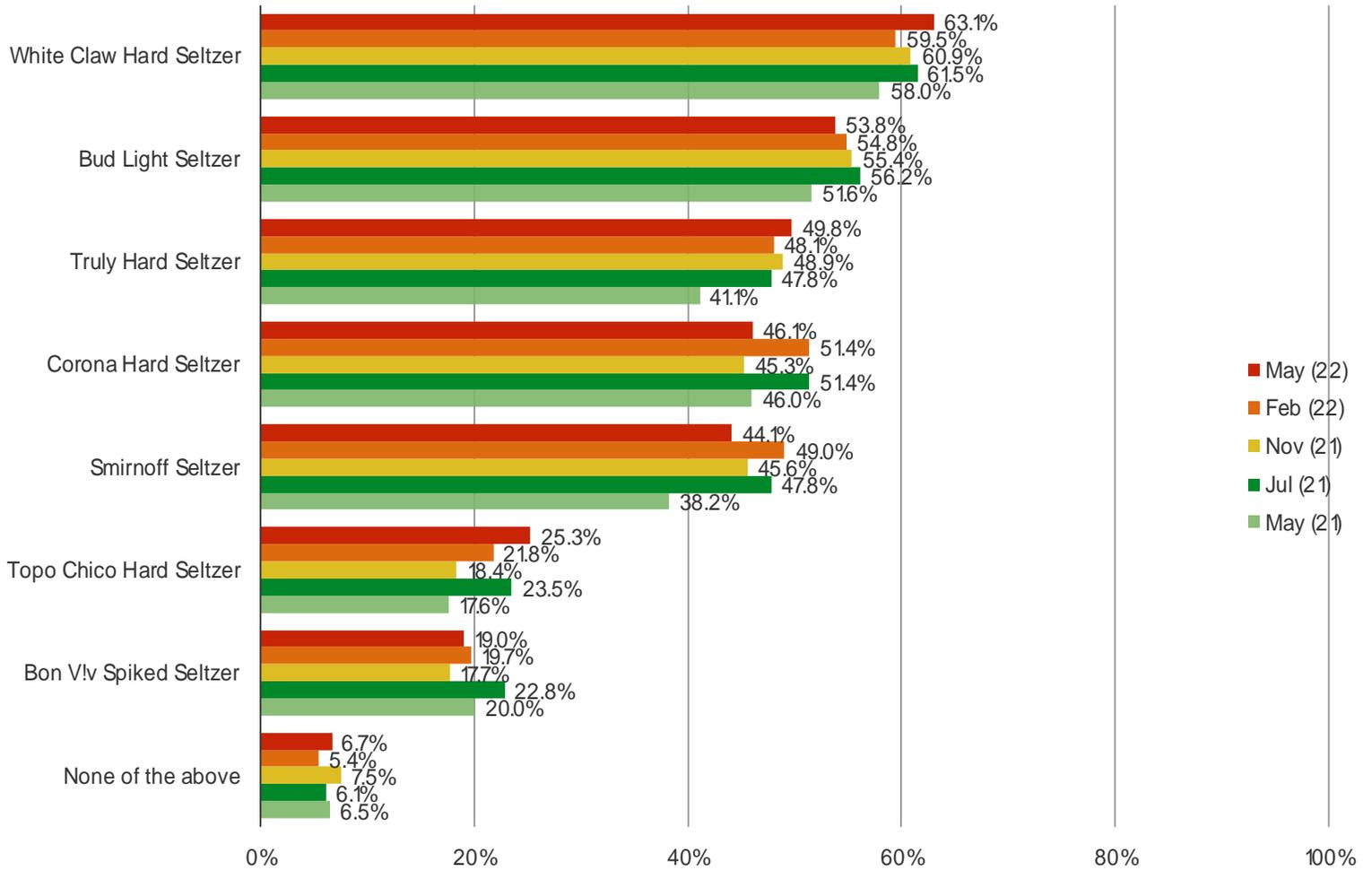
November 2021

July 2021



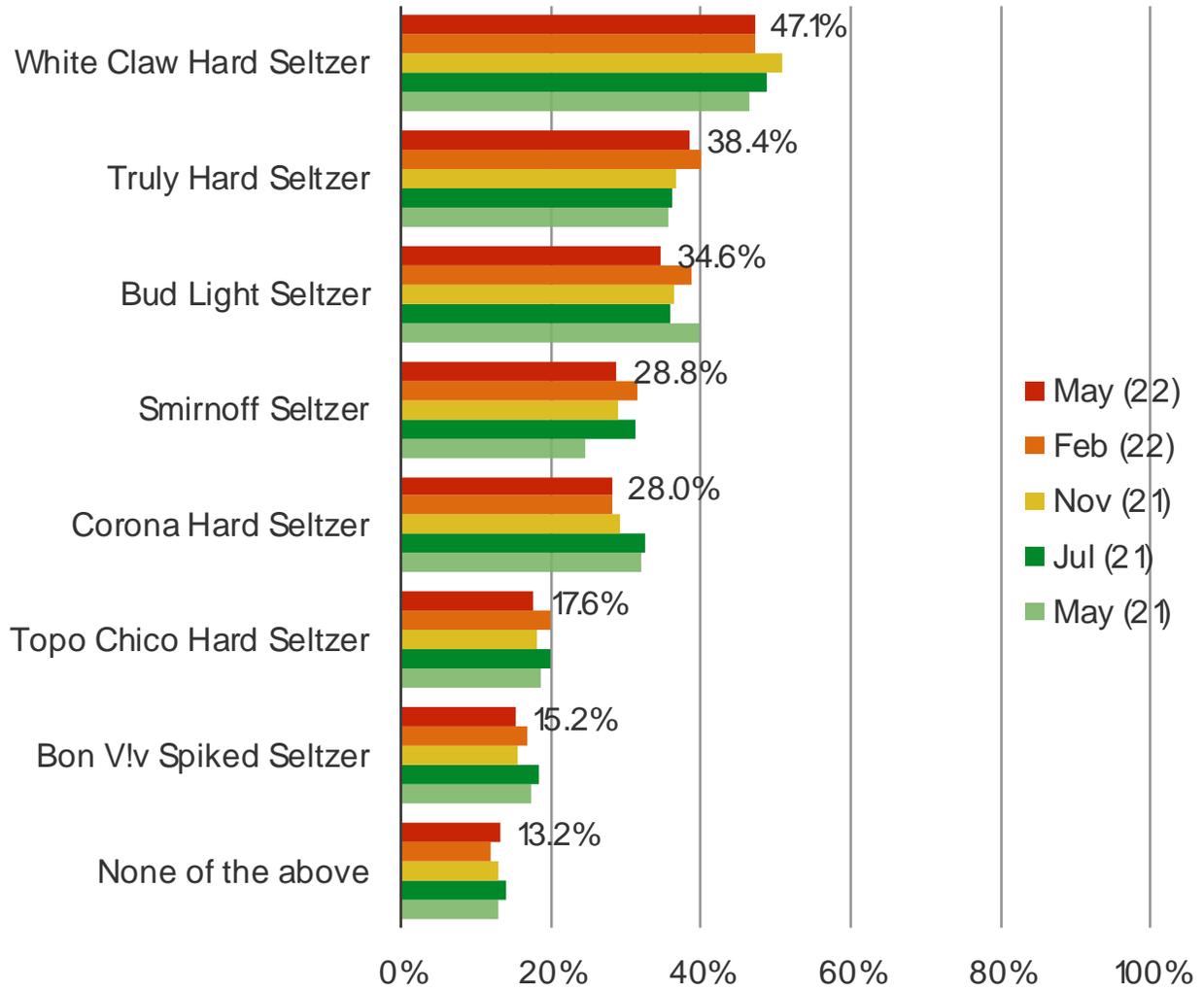
ARE YOU AWARE OF ANY OF THE FOLLOWING BRANDS? SELECT ALL THAT APPLY

Posed to all respondents who have consumed hard seltzer (N = 810).



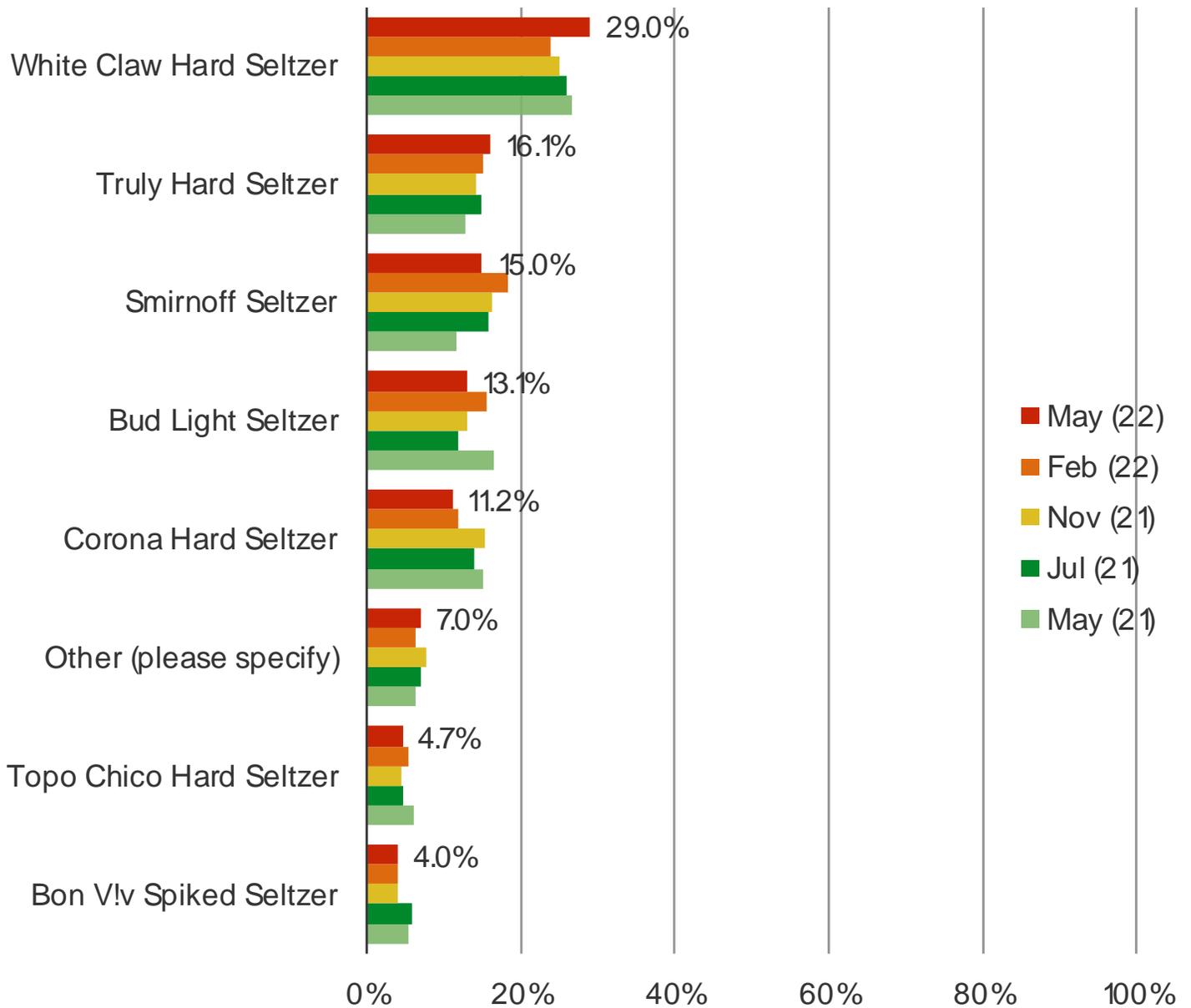
HAVE YOU EVER TRIED HARD SELTZER FROM ANY OF THE FOLLOWING BRANDS? SELECT ALL THAT APPLY

Posed to all respondents who have consumed hard seltzer (N = 810).



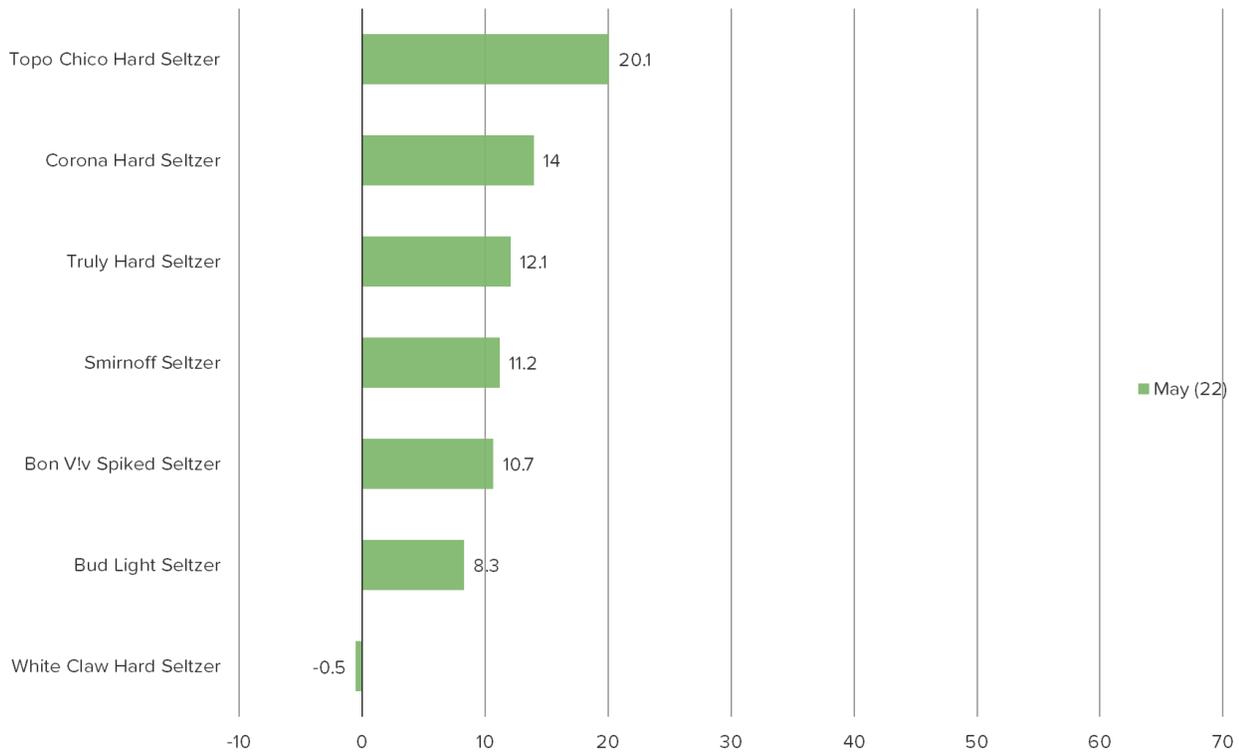
IN YOUR OPINION, WHICH BRAND IS BEST FOR HARD SELTZER? SELECT ALL THAT APPLY

Posed to all respondents who have consumed hard seltzer (N = 810).



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

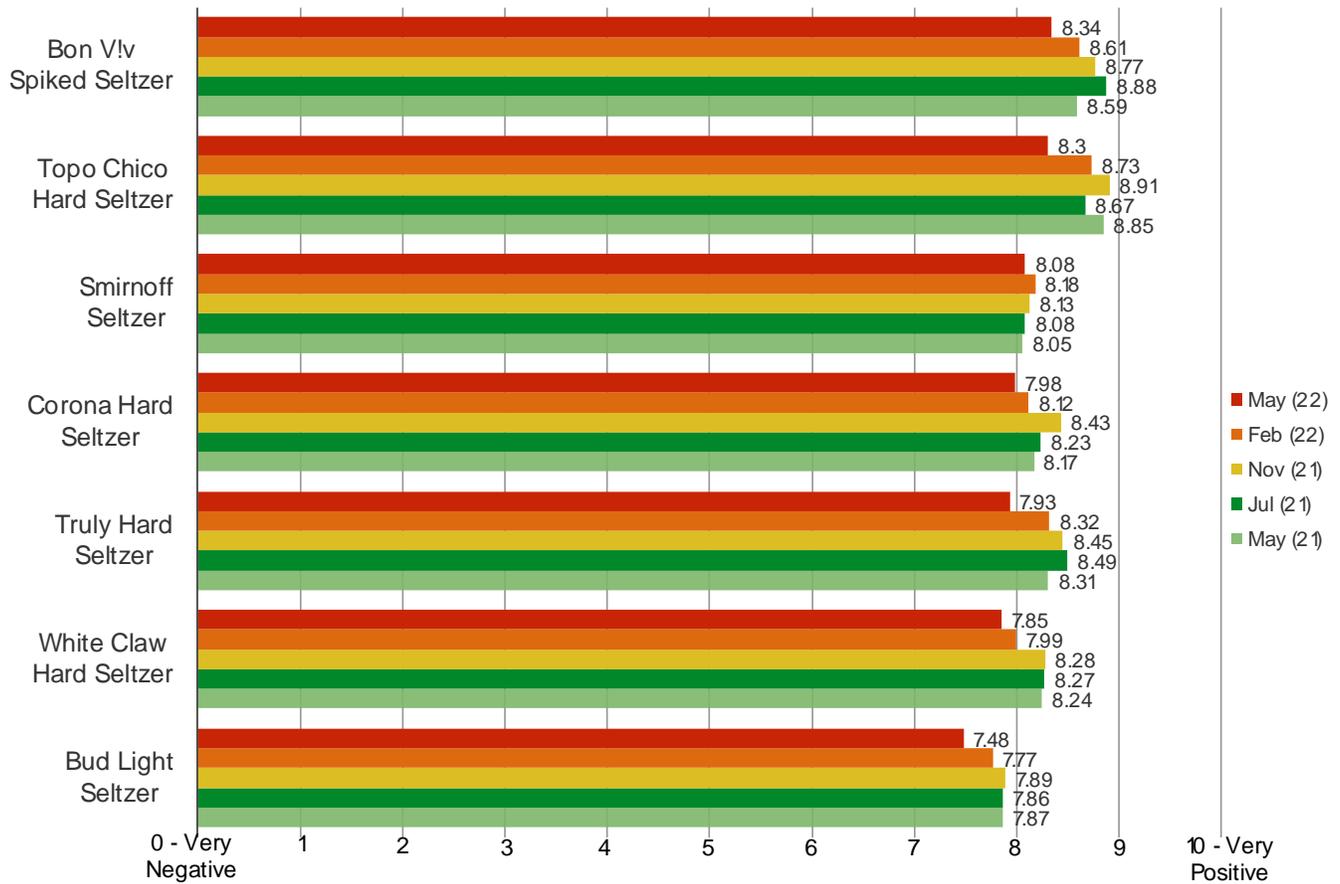
Posed to all hard seltzer drinkers who have tried each of the following.



	N=
Topo Chico Hard Seltzer	144
White Claw Hard Seltzer	385
Bon Viv Spiked Seltzer	122
Truly Hard Seltzer	314
Corona Hard Seltzer	228
Bud Light Seltzer	278
Smirnoff Seltzer	233

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	208
White Claw Hard Seltzer	508
Bon V!v Spiked Seltzer	154
Truly Hard Seltzer	403
Corona Hard Seltzer	373
Bud Light Seltzer	435
Smirnoff Seltzer	358