

# Bespoke Survey Research

August 2024

## CPGs, Beer, and Hard Seltzer

Volume 25 | Quarterly Survey

1,250 US Consumers Balanced To Census

Tickers Covered: PG, SAM, BUD, STZ.

### Key Takeaways:

- ❑ For CPGs in general, price has grown in importance as the top factor for choosing which items to buy. Over the course of recent years, natural/organic and environmentally friendly have declined in importance.
- ❑ Consumer expectations around spending on CPGs ticked up q/q but remains lower than series highs set in 2022.
- ❑ This quarter, we included some questions to better understand trends within non-alcoholic beer offerings. Respondents who have used non-alcoholic beer more than once have a very positive opinion of it. Turning to the complexion of the customer base, non-alcoholic beer drinkers over-index to males over females and to younger age bands (compared to census). While some non-alcoholic beer drinkers view it as replacement, a large percentage of customers view it as additive. Among those who have never consumed non-alcoholic beer, around 12% noted that they might try non-alcoholic beer in the future.
- ❑ This quarter, we also added some questions to better understand dynamics for High Noon.
- ❑ Turning to regular beer, sentiment toward Bud Light improved sequentially.

### Noteworthy Stats:

**23.9%** Of respondents have a positive to very positive opinion of non-alcoholic beer.

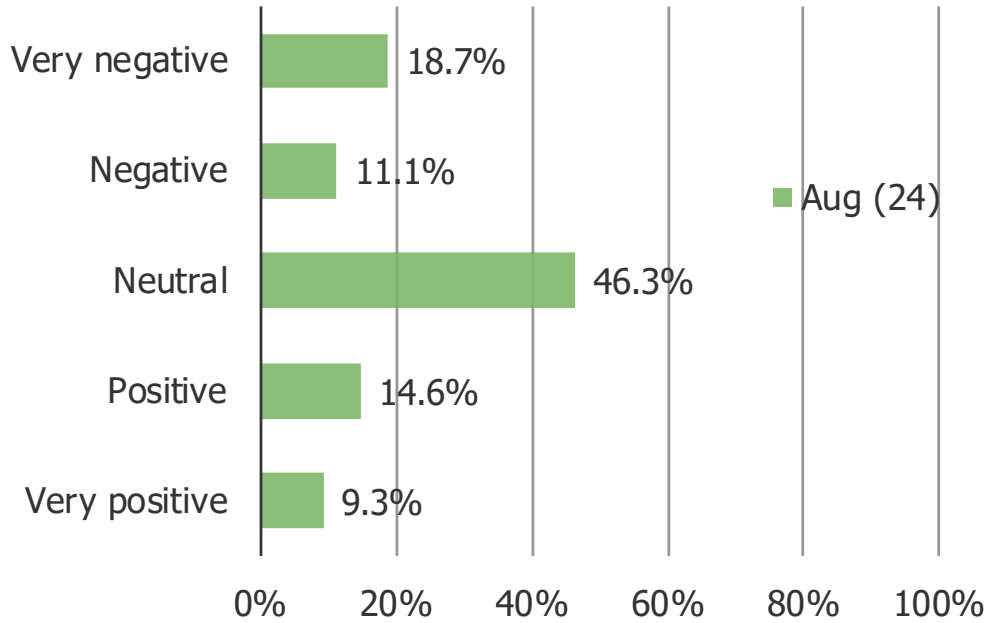
**6.9%** Of respondents have heard of Athletic Brewing Company.

**5.3%** Of respondents have tried Athletic Brewing Company.

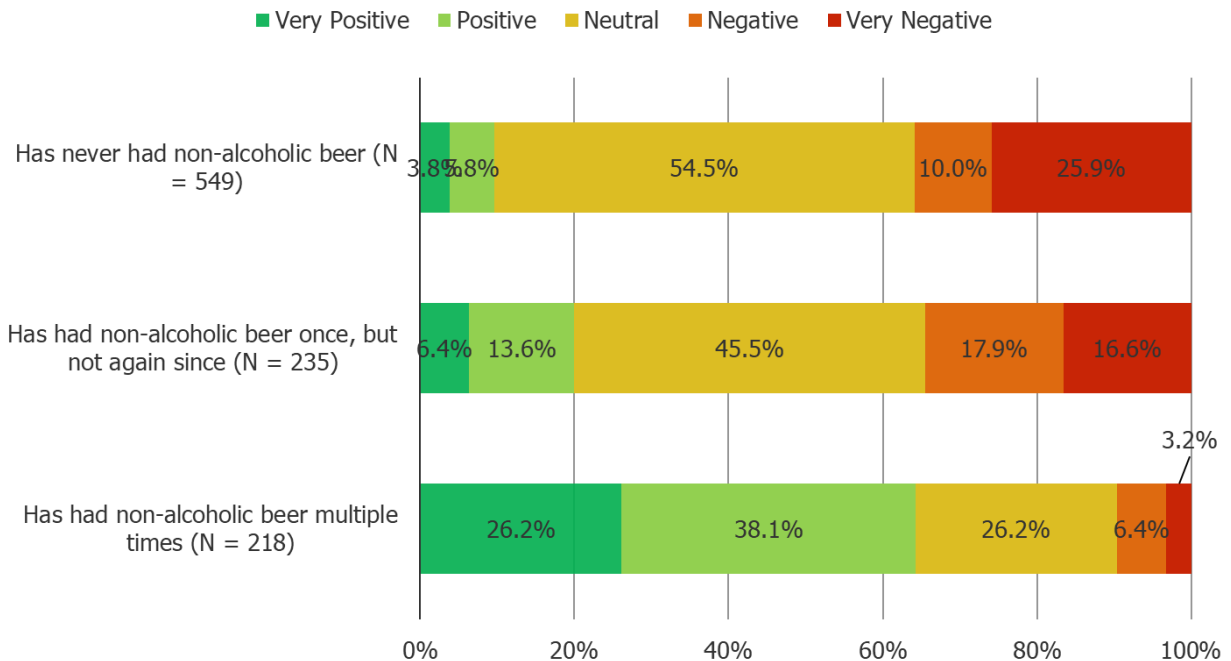
# NON-ALCOHOLIC BEER

**WHAT IS YOUR OPINION OF NON-ALCOHOLIC BEER?**

Posed to all respondents

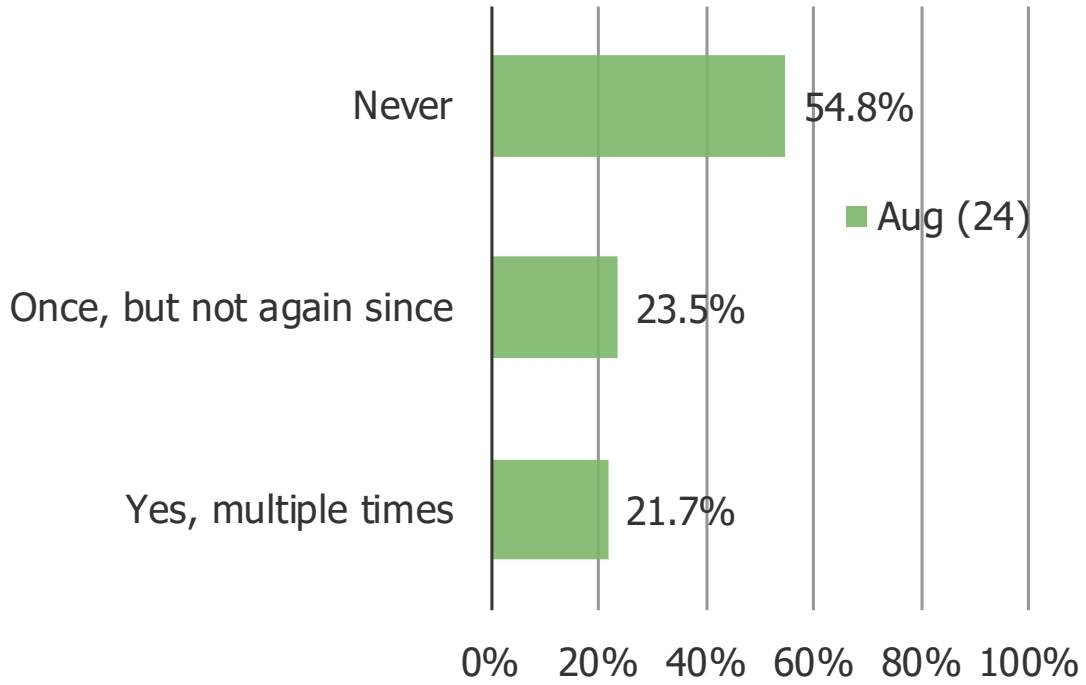


Cross-tabbed by their experience with non-alcoholic beer...



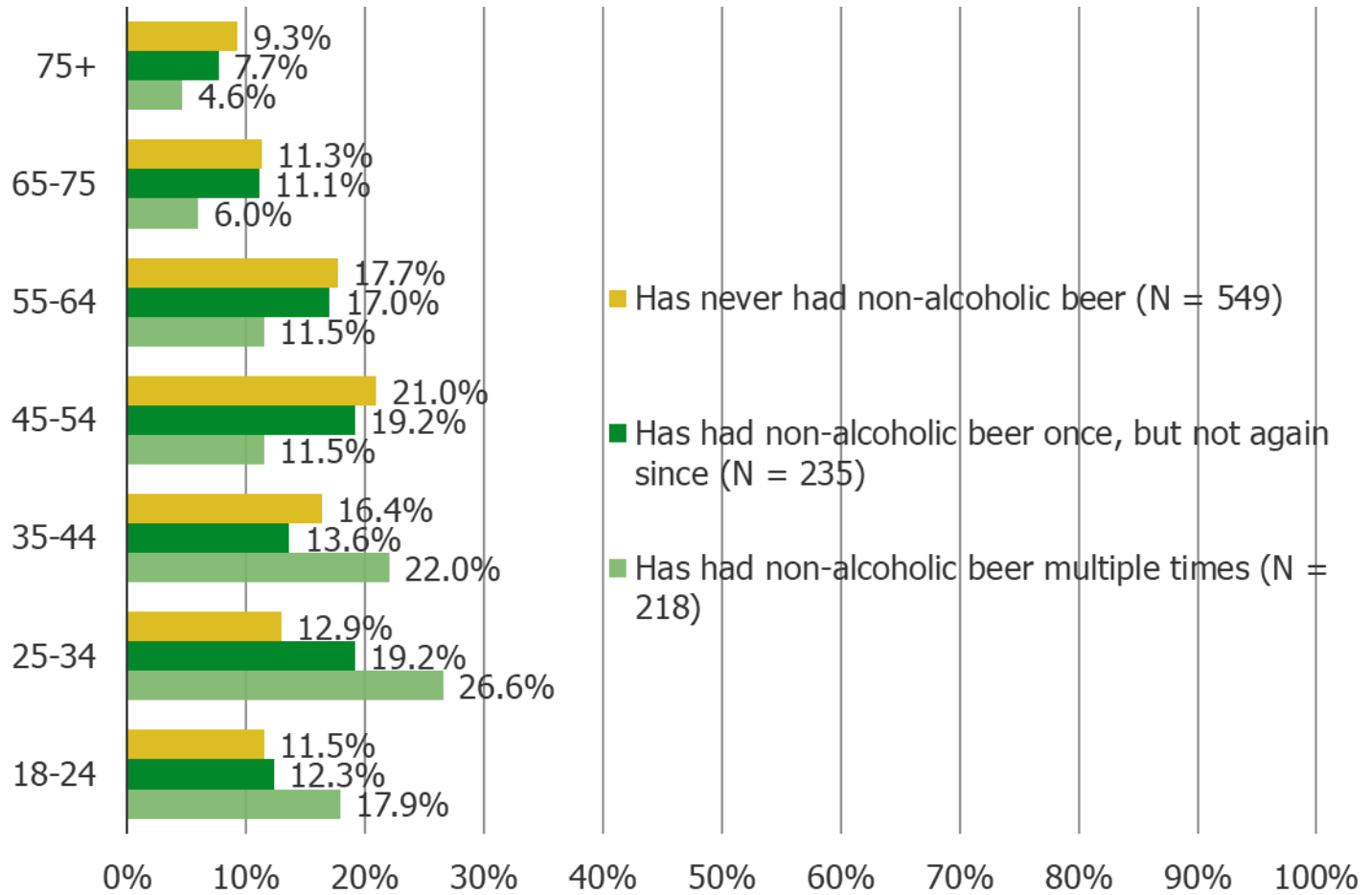
HAVE YOU EVER CONSUMED NON-ALCOHOLIC BEER?

Posed to all respondents



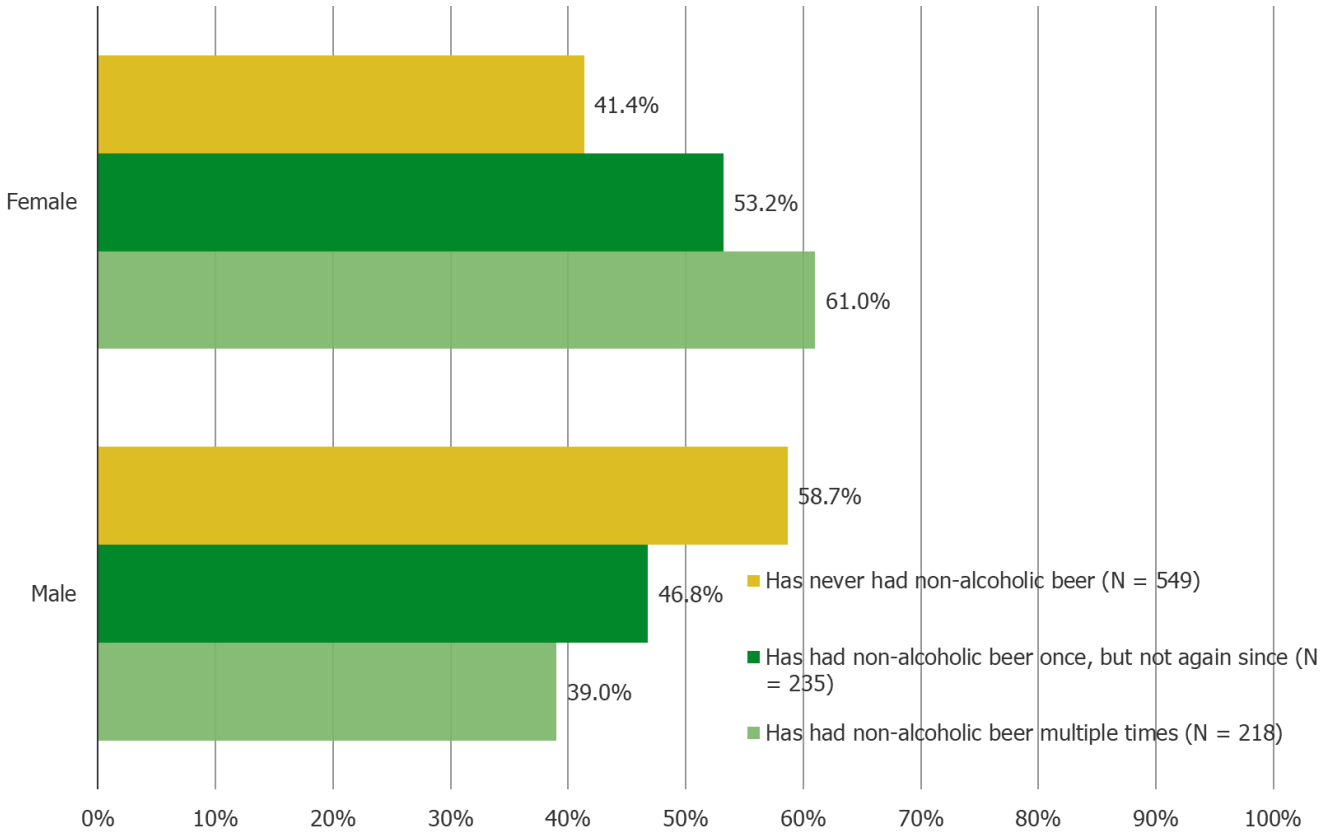
**WHO IS THE CUSTOMER? EXPERIENCE WITH NON-ALCOHOLIC BEER**

Age:



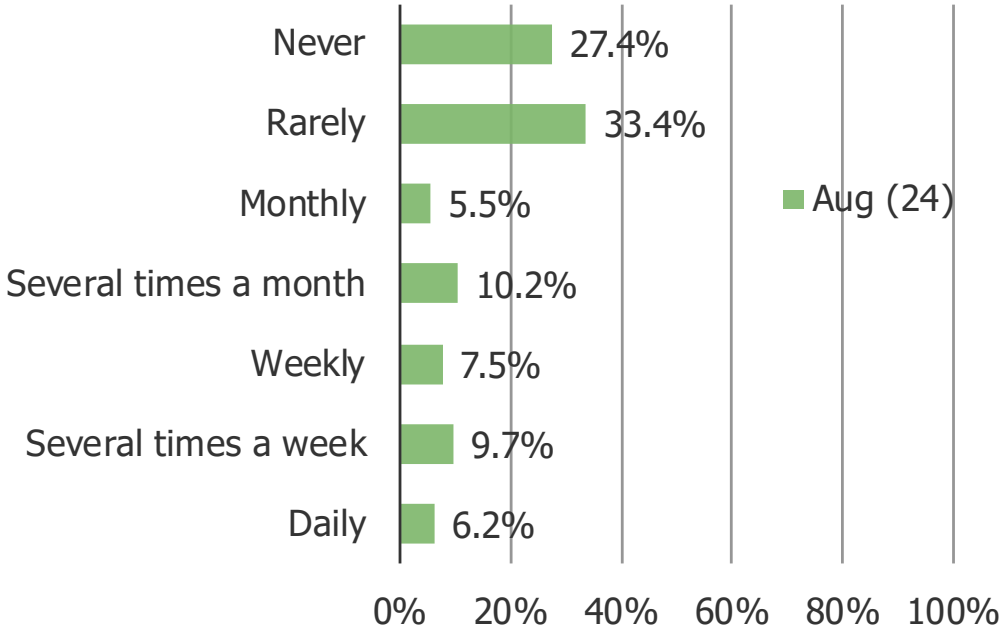
WHO IS THE CUSTOMER? EXPERIENCE WITH NON-ALCOHOLIC BEER

Gender:



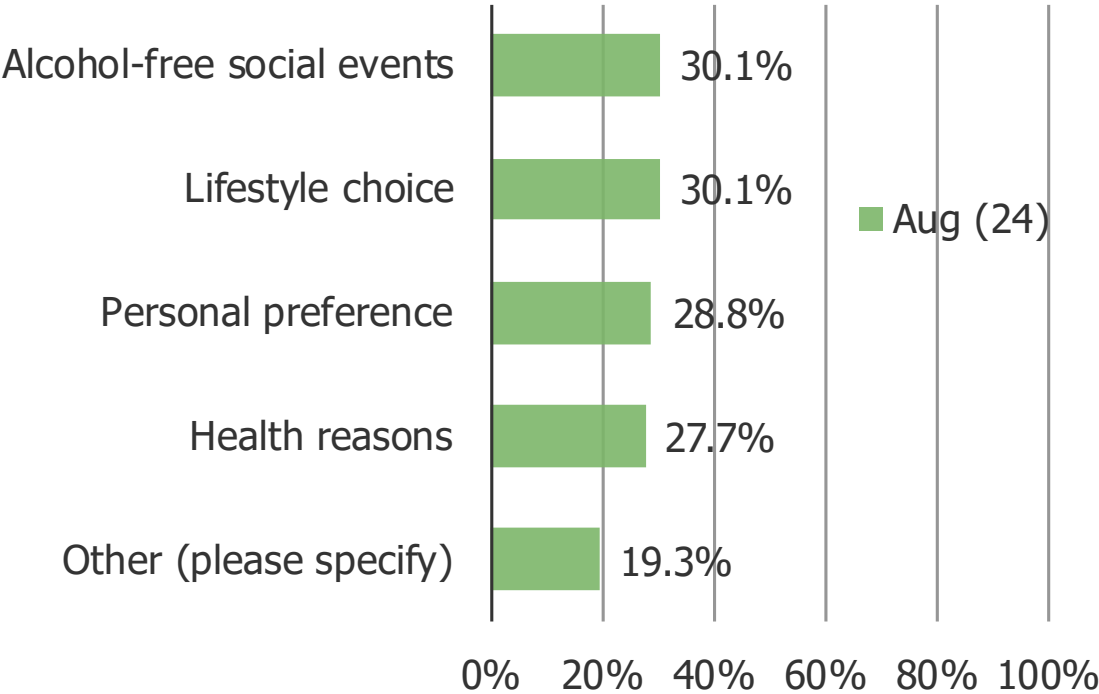
HOW OFTEN DO YOU CONSUME NON-ALCOHOLIC BEER?

Posed to all respondents who consume non-alcoholic beer.



WHAT ARE YOUR PRIMARY REASONS FOR CHOOSING NON-ALCOHOLIC BEER? (SELECT ALL THAT APPLY)

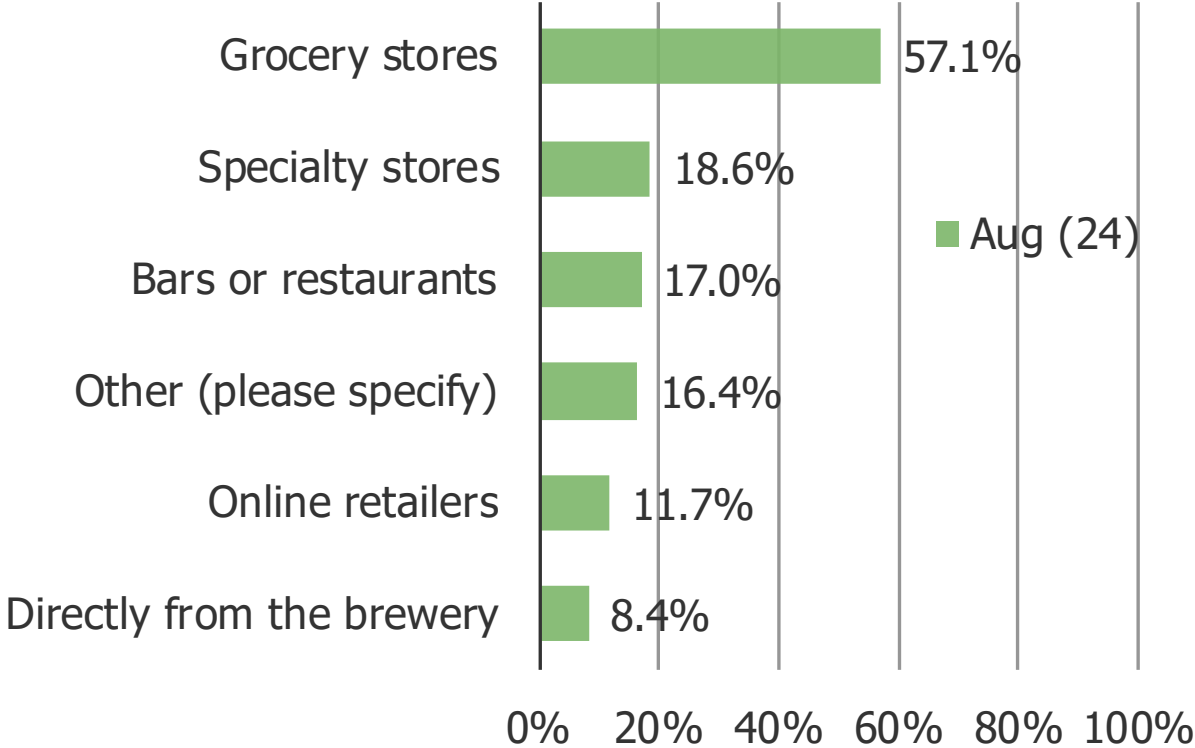
Posed to all respondents who consume non-alcoholic beer.





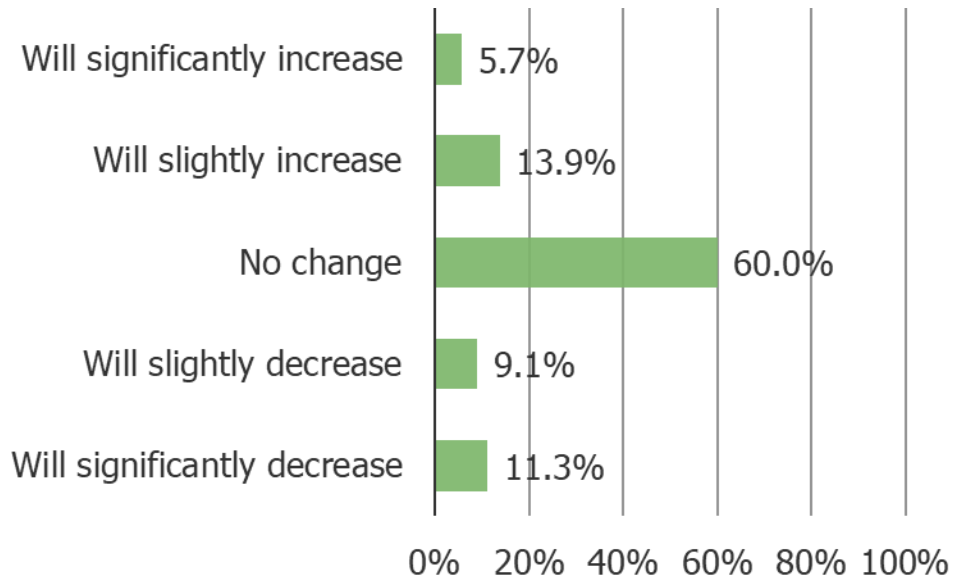
WHERE DO YOU TYPICALLY PURCHASE NON-ALCOHOLIC BEER? (SELECT ALL THAT APPLY)

Posed to all respondents who consume non-alcoholic beer.

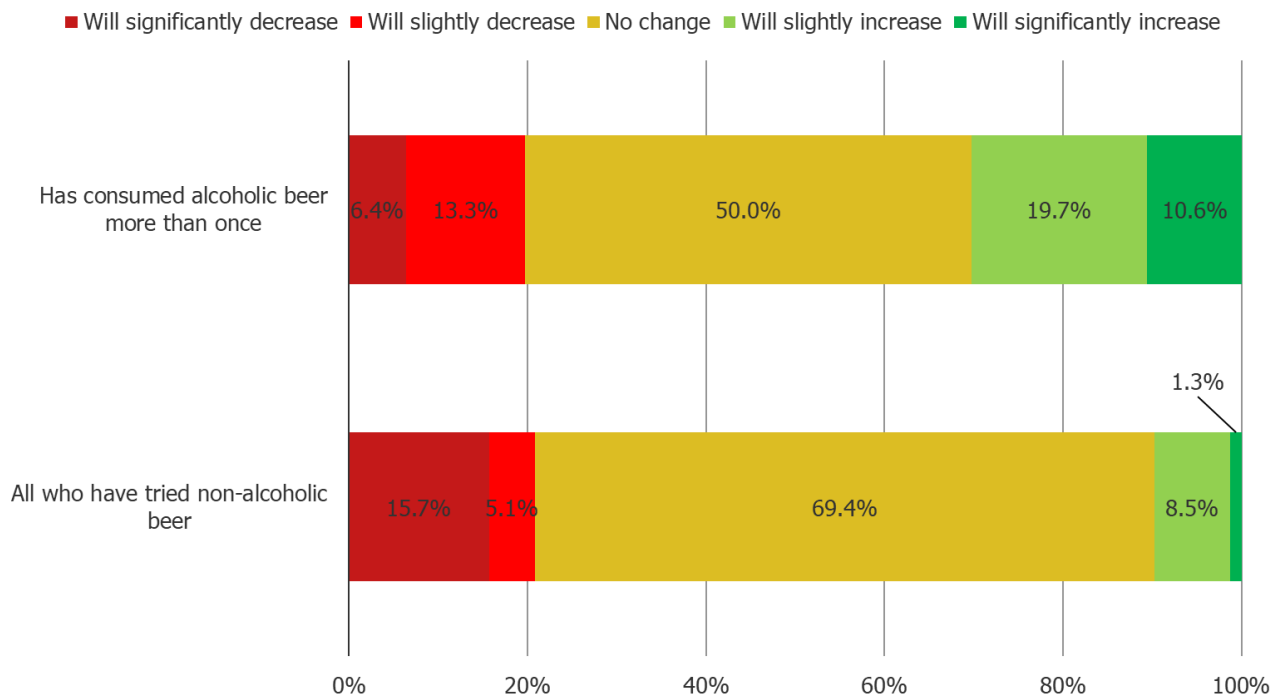


**DO YOU EXPECT TO CHANGE HOW OFTEN YOU DRINK NON-ALCOHOLIC BEER IN THE FUTURE?**

Posed to all respondents who consume non-alcoholic beer.

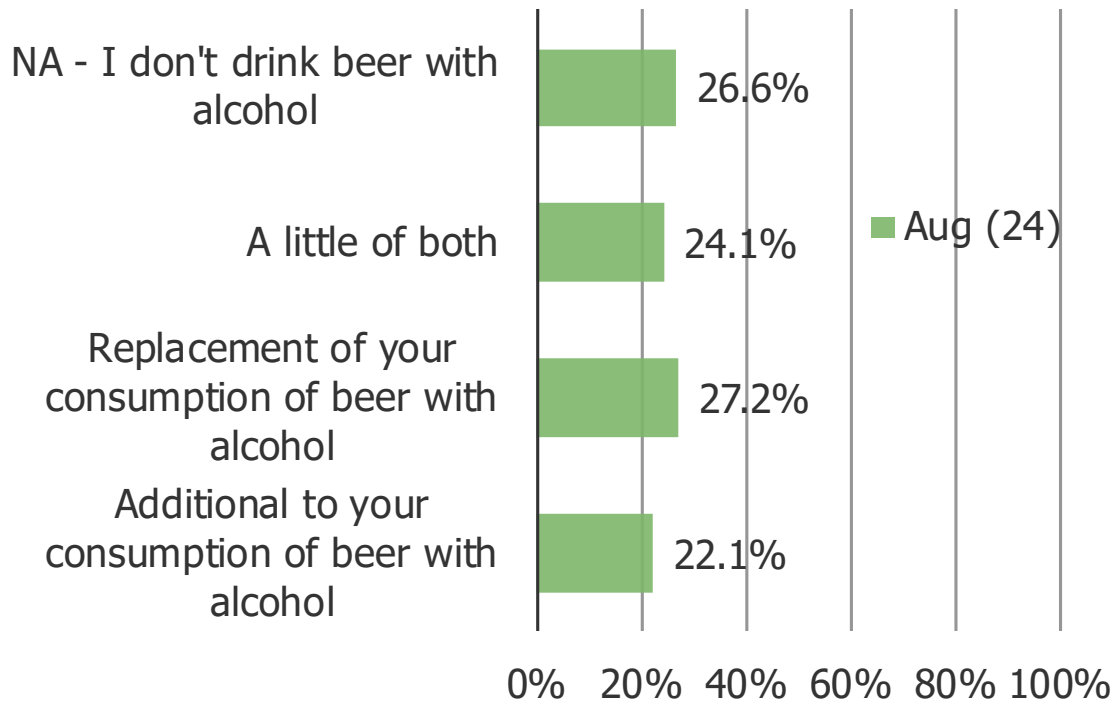


Cross-tabbed by their experience with non-alcoholic beer...



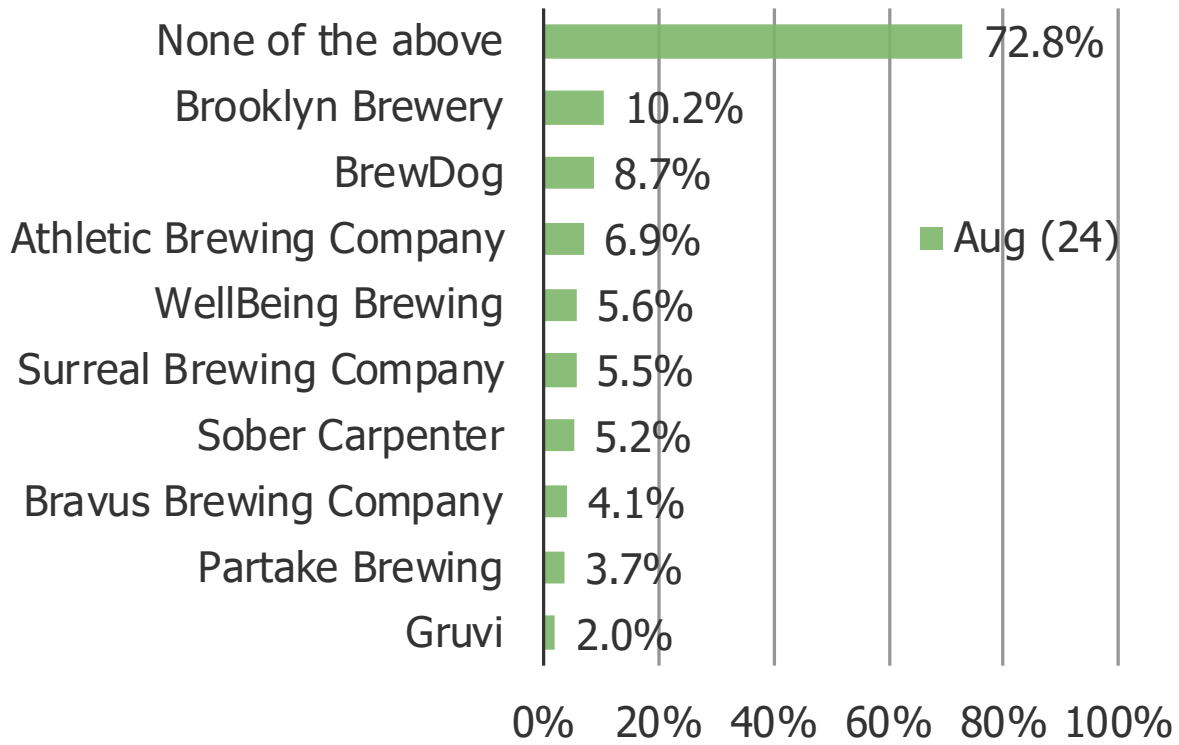
IS YOUR CONSUMPTION OF NON-ALCOHOLIC BEER...

Posed to all respondents who consume non-alcoholic beer.



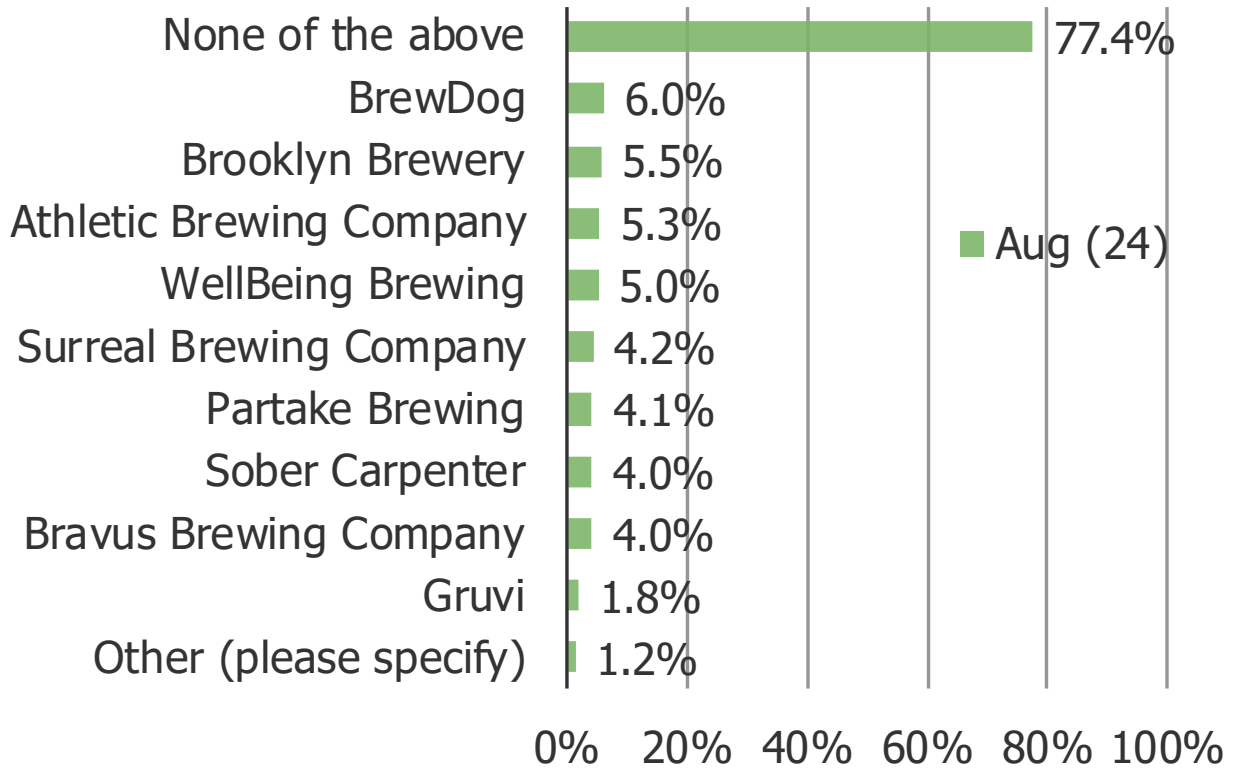
HAVE YOU HEARD OF ANY OF THE FOLLOWING NON-ALCOHOLIC BEER BRANDS? SELECT ALL THAT APPLY

Posed to all respondents



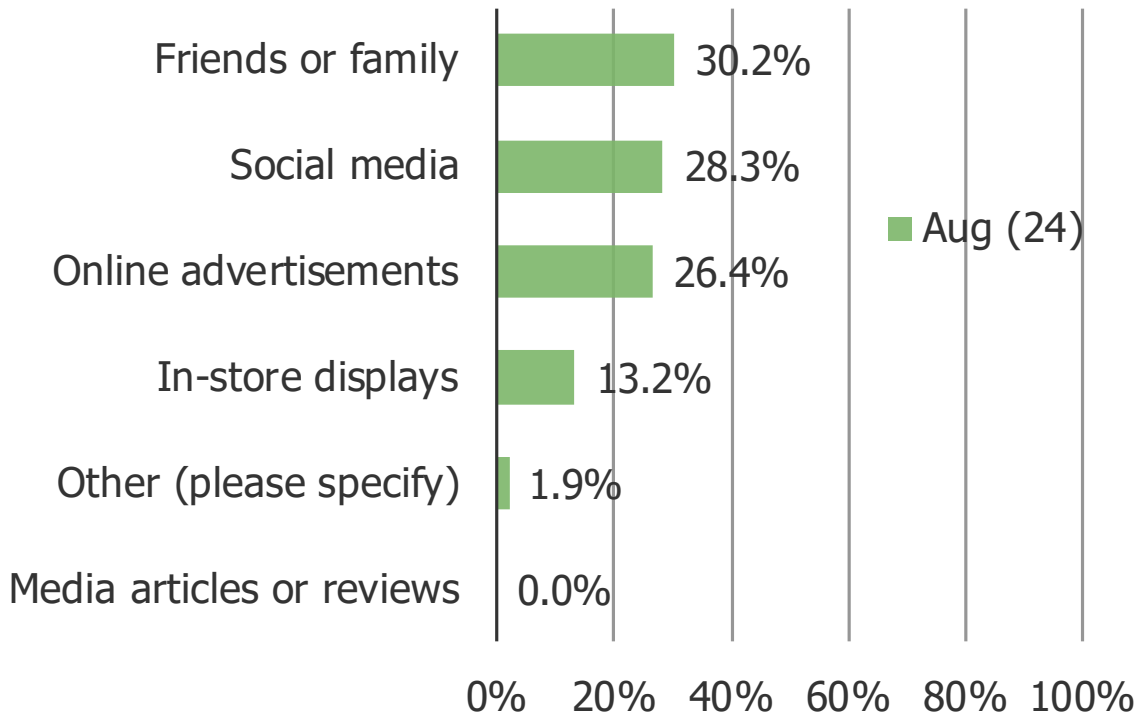
HAVE YOU EVER TRIED ANY OF THE FOLLOWING NON-ALCOHOLIC BEER BRANDS? SELECT ALL THAT APPLY

Posed to all respondents



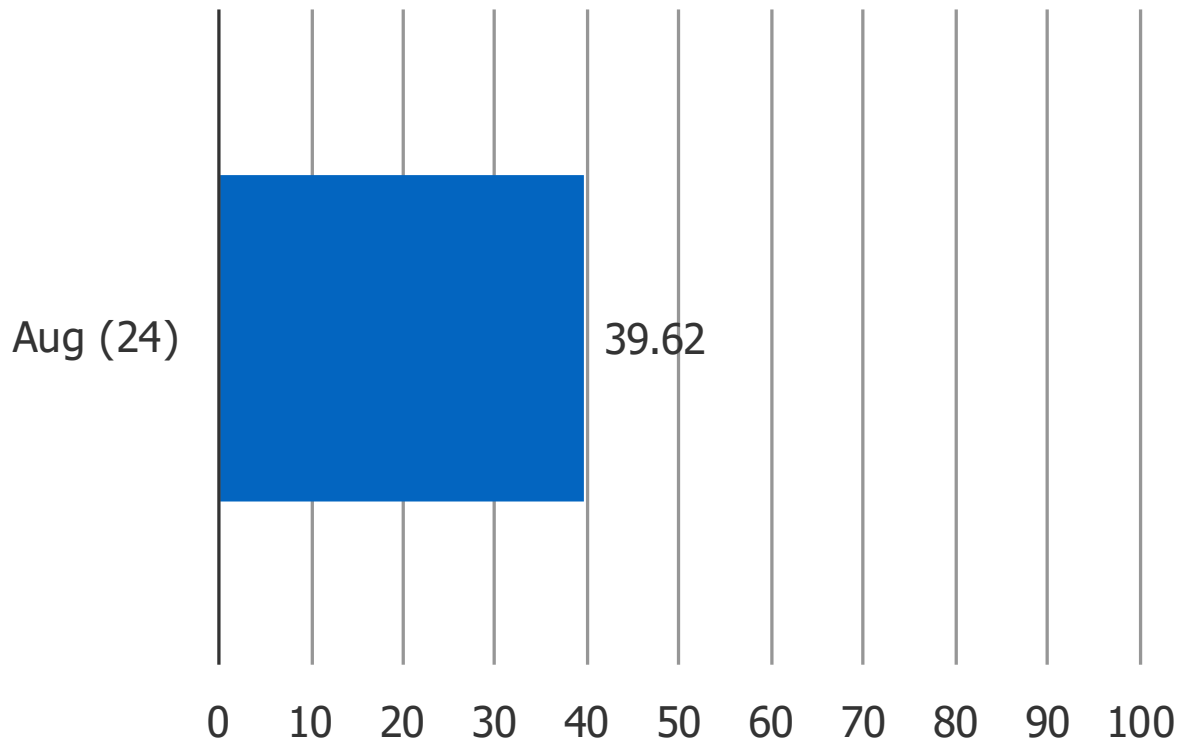
HOW DID YOU FIRST LEARN ABOUT ATHLETIC BREWING COMPANY?

Posed to all respondents who have tried Athletic Brewing (N = 53).



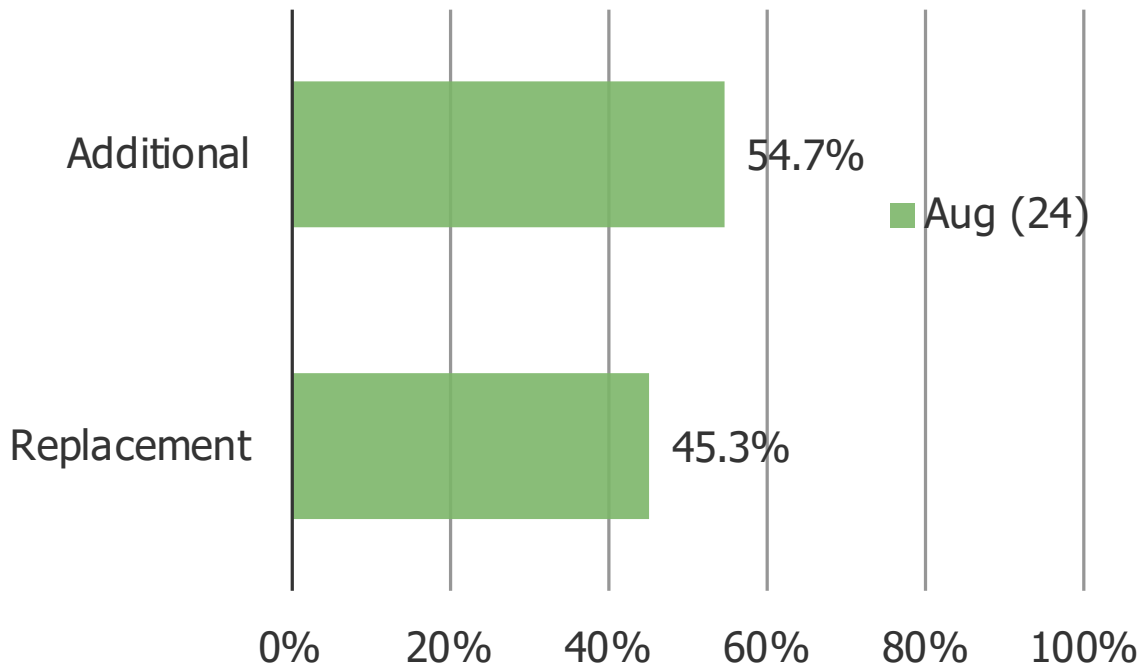
HOW LIKELY IS IT THAT YOU WOULD RECOMMEND ATHLETIC BREWING TO A FRIEND OR COLLEAGUE?

Posed to all respondents who have tried Athletic Brewing (N = 53).



DO YOU VIEW YOUR CONSUMPTION OF ATHLETIC BREWING TO BE ADDITIONAL OR REPLACEMENT OF REGULAR BEER CONSUMPTION?

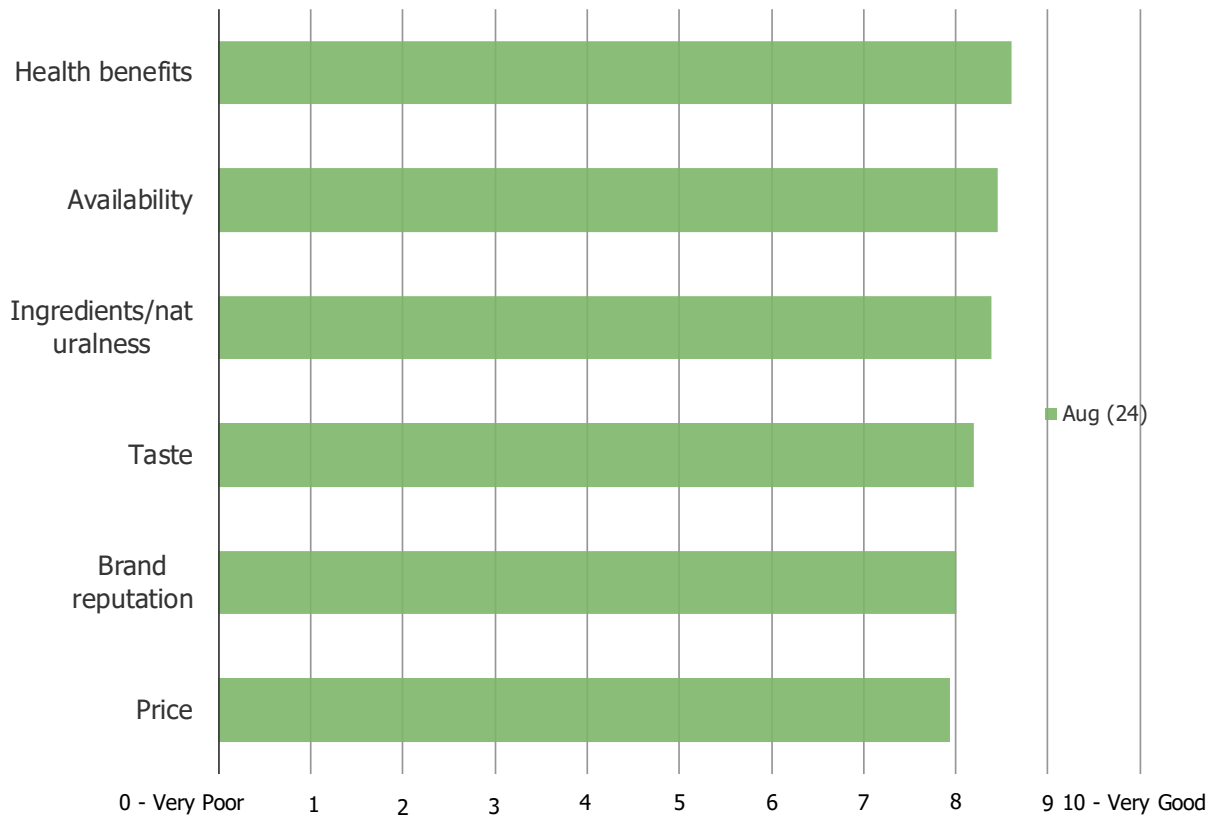
Posed to all respondents who have tried Athletic Brewing (N = 53).





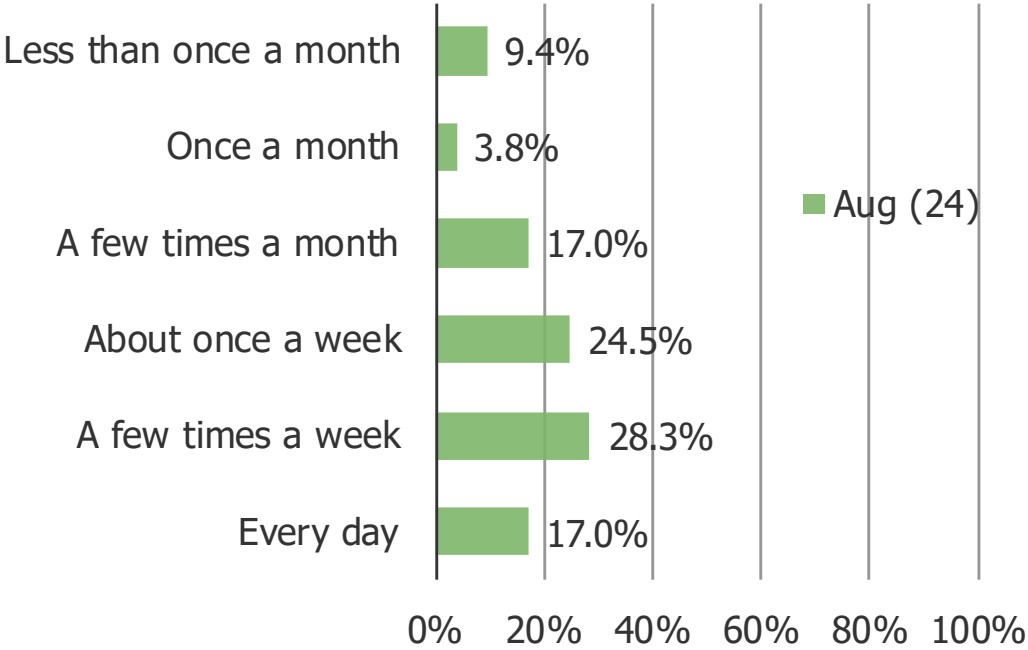
HOW WOULD YOU RATE ATHLETIC BREWING WHEN IT COMES TO...

Posed to all respondents who have tried Athletic Brewing (N = 53).



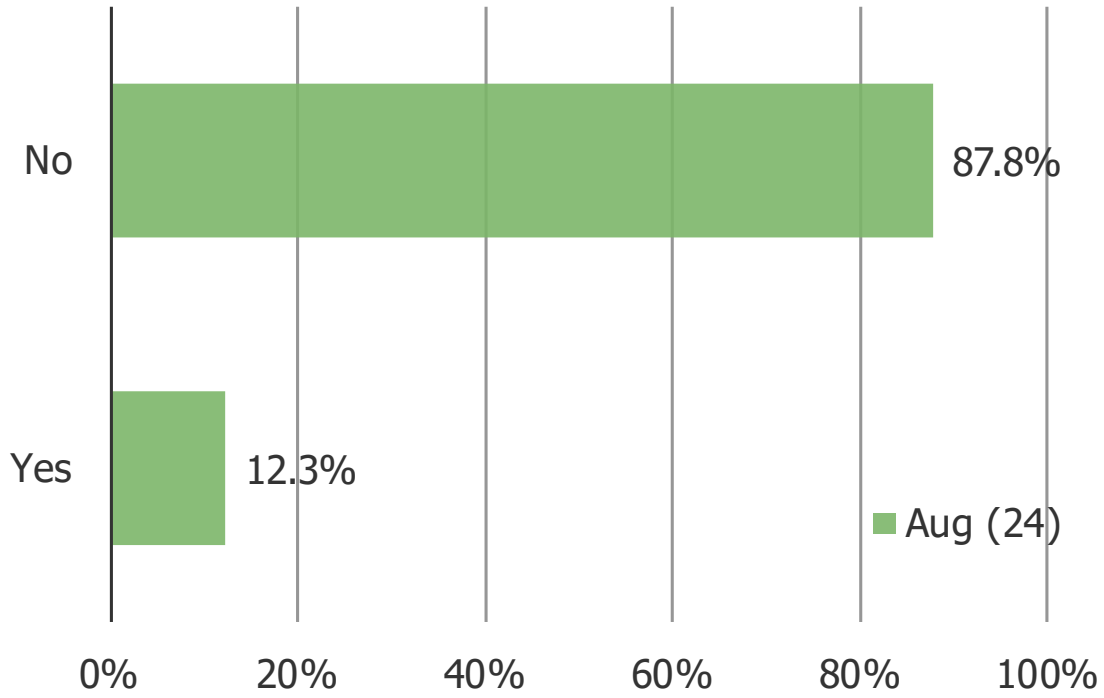
HOW OFTEN DO YOU DRINK ATHLETIC BREWING PRODUCTS?

Posed to all respondents who have tried Athletic Brewing (N = 53).



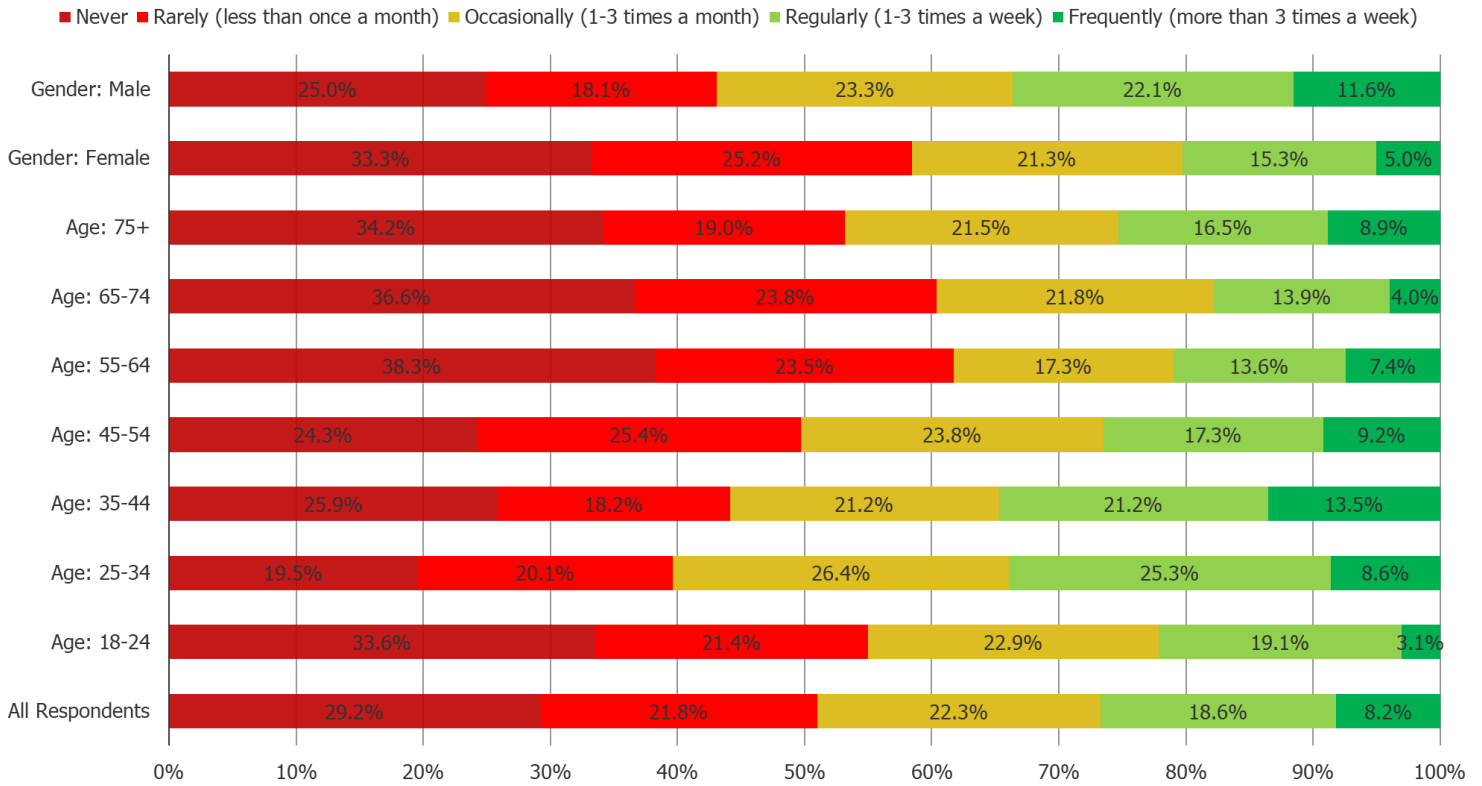
YOU MENTIONED THAT YOU NEVER CONSUME NON-ALCOHOLIC BEER. COULD YOU SEE YOURSELF BEING A CONSUMER OF NON-ALCOHOLIC BEER IN THE FUTURE?

Posed to all respondents who never consume non-alcoholic beer.



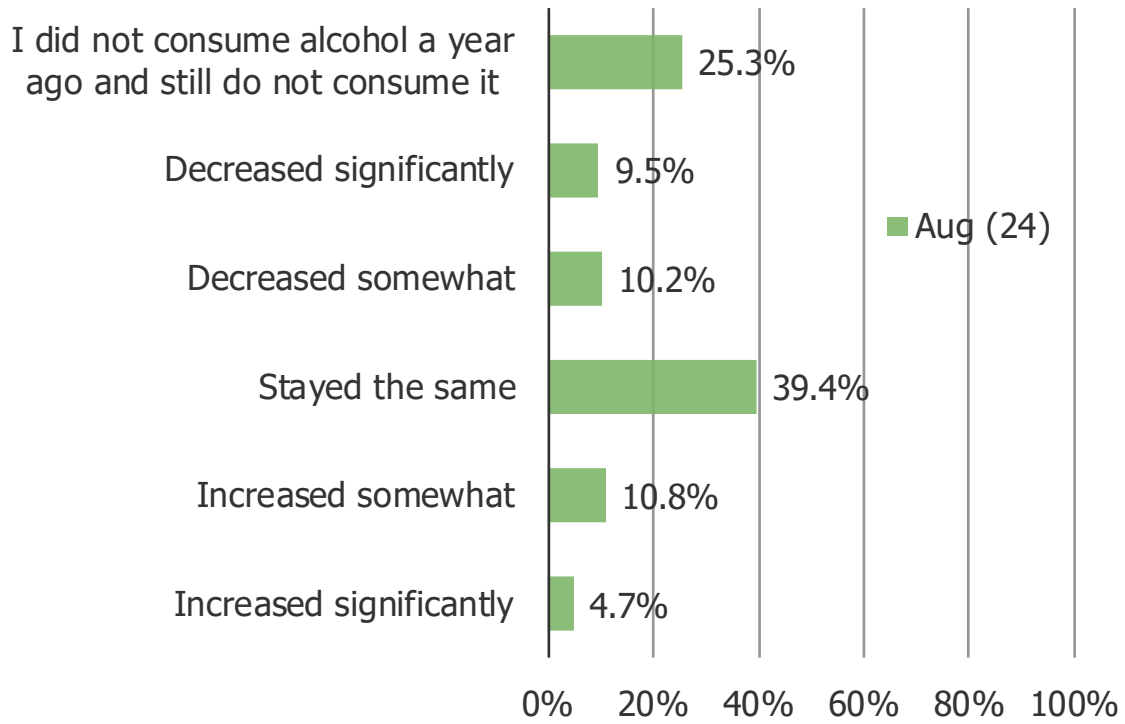
**HOW OFTEN DO YOU CONSUME ALCOHOLIC BEVERAGES?**

Posed to all respondents



COMPARED TO ONE YEAR AGO, HOW HAS YOUR ALCOHOL CONSUMPTION CHANGED?

Posed to all respondents

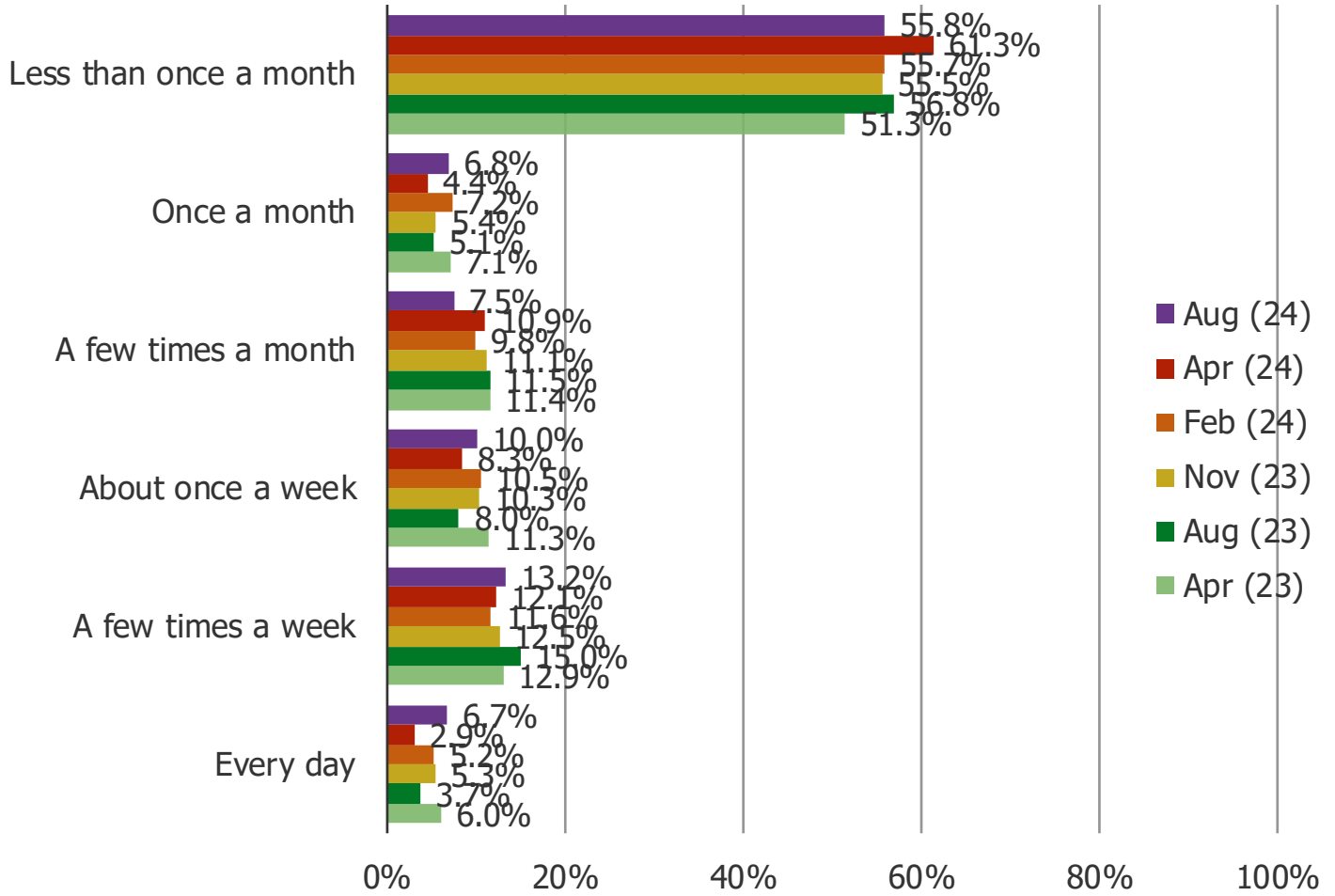


Davids vs. Goliaths

BEER

HOW OFTEN DO YOU DRINK BEER?

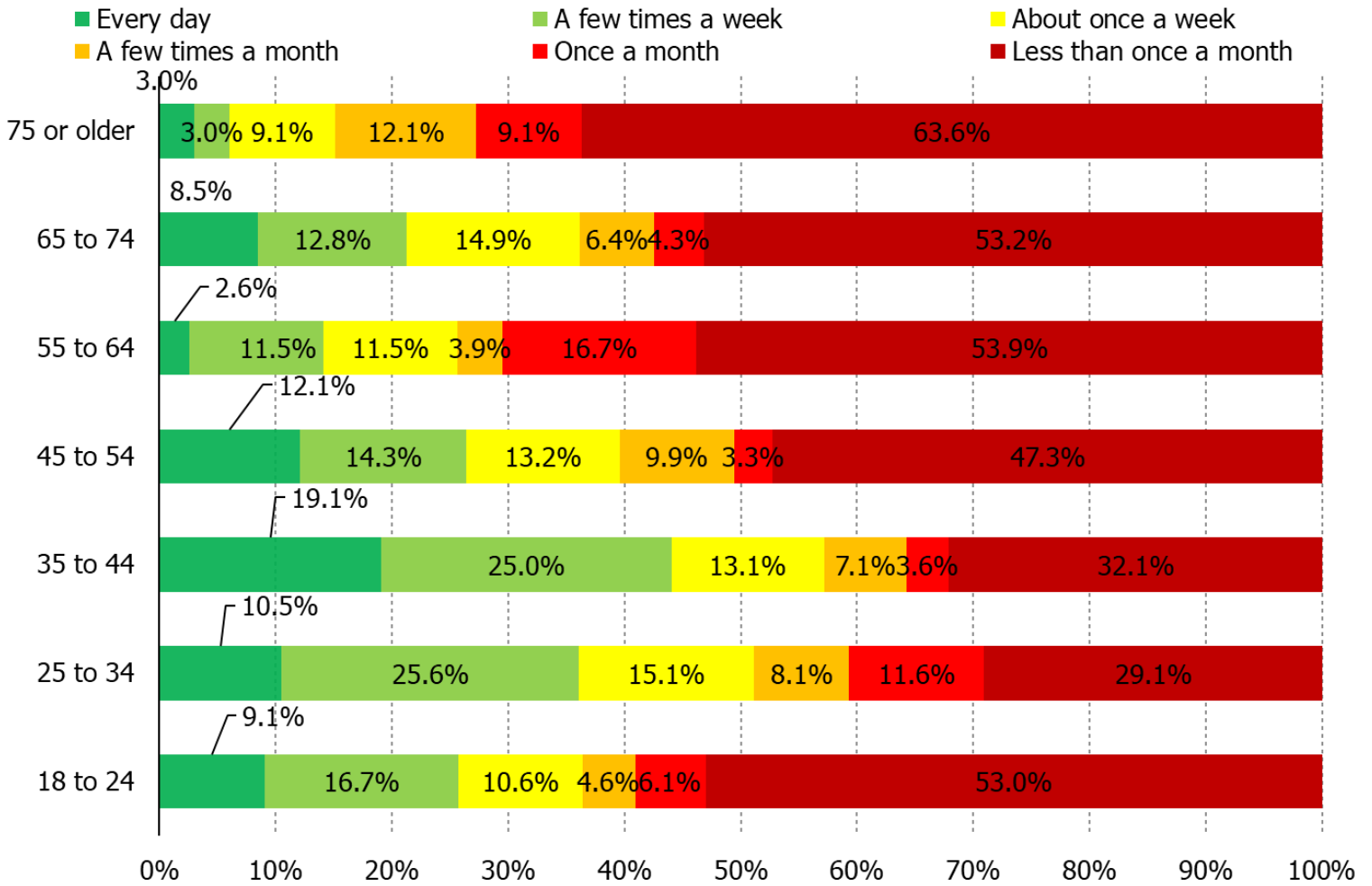
Posed to all respondents



**HOW OFTEN DO YOU DRINK BEER?**

Posed to all respondents

Cross-Tabs: Male, by Age.

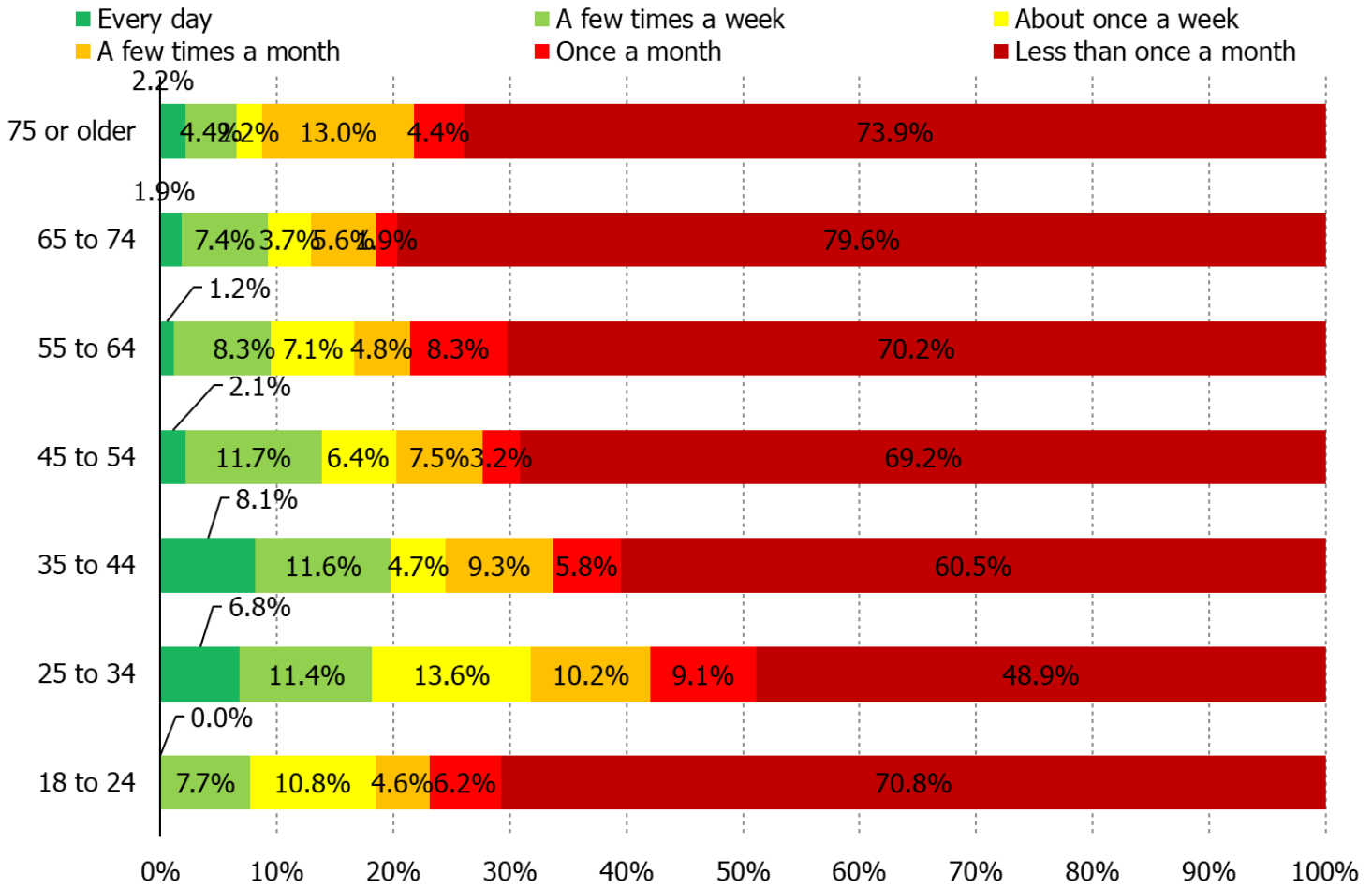




**HOW OFTEN DO YOU DRINK BEER?**

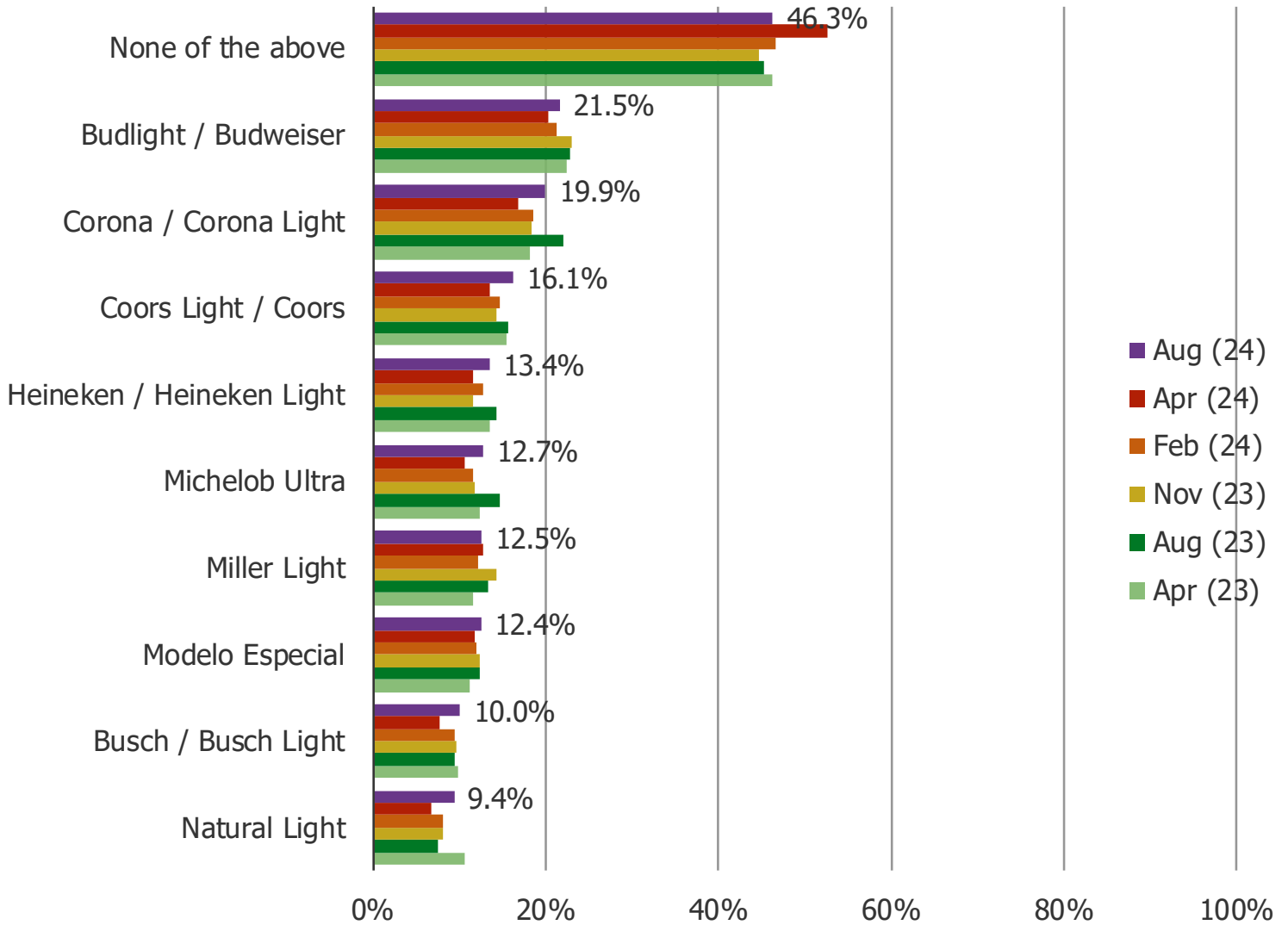
Posed to all respondents

Cross-Tabs: Female, by Age.



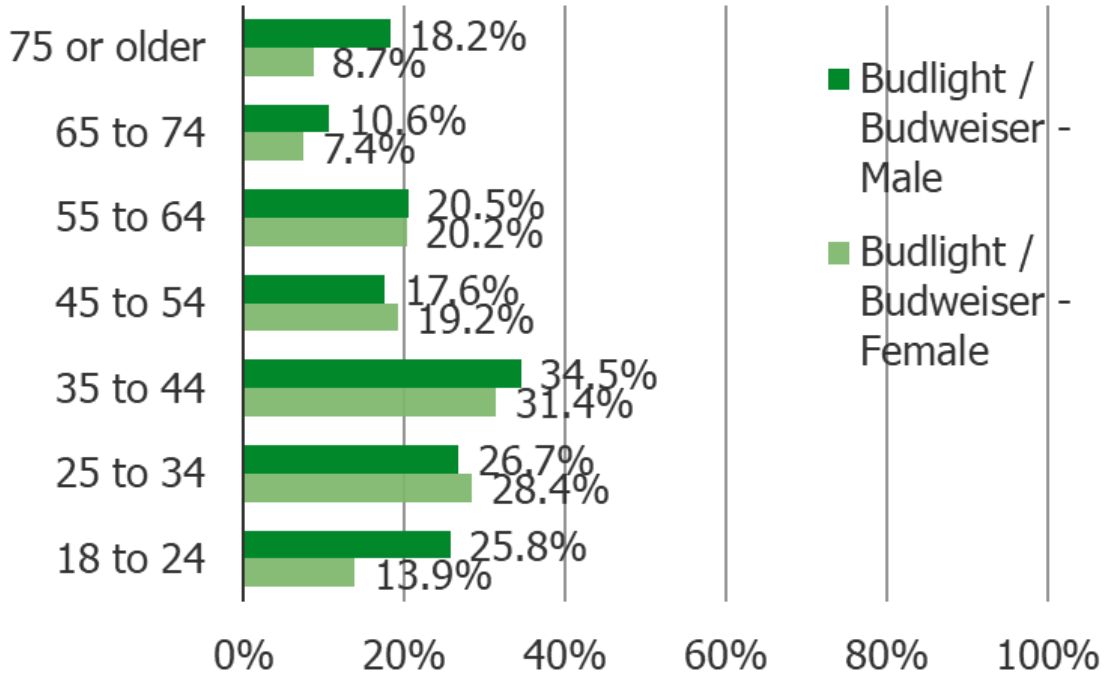
HAVE YOU PURCHASED BEER FROM ANY OF THE FOLLOWING IN THE PAST YEAR?

Posed to all respondents



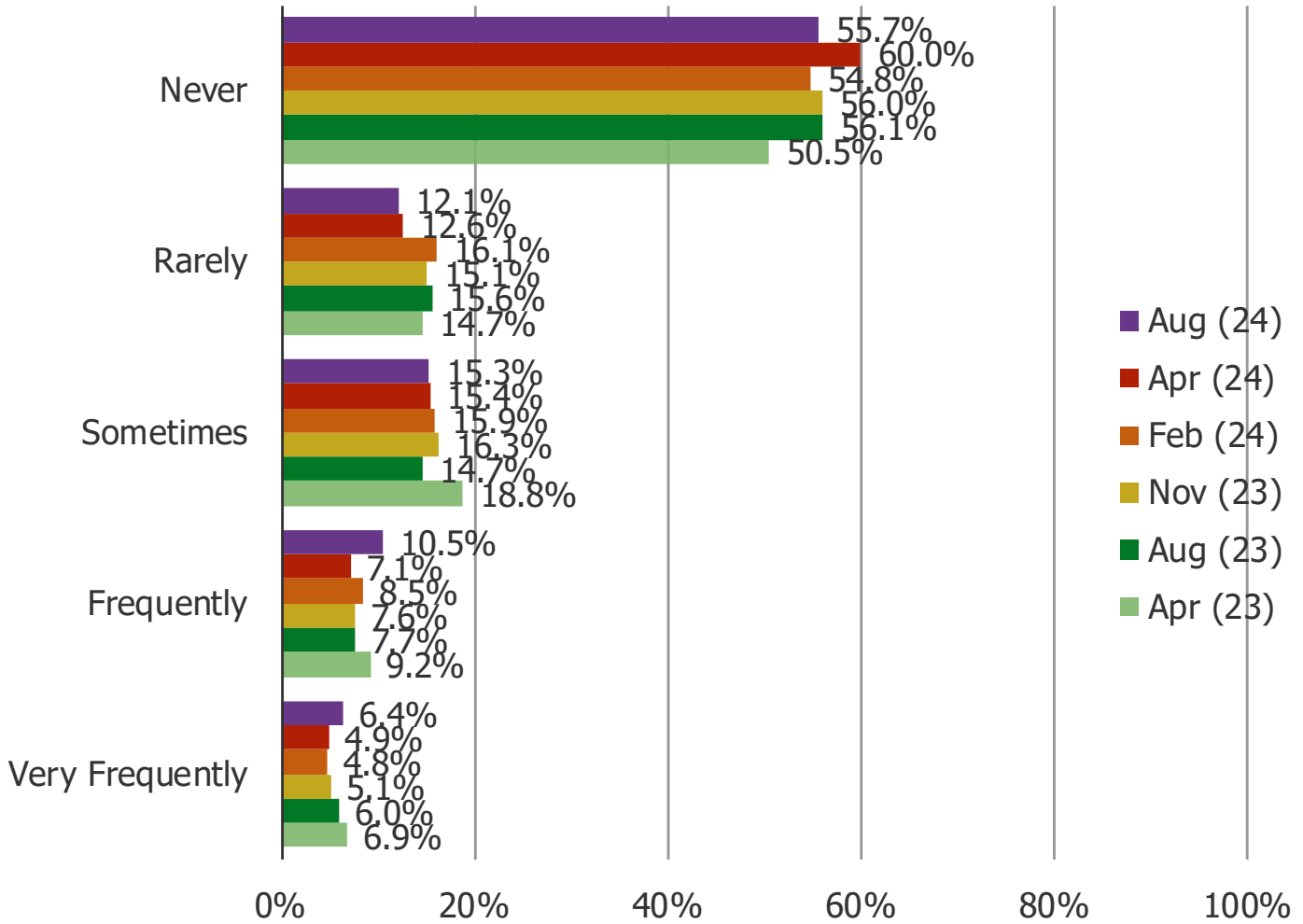
% HAS PURCHASED BUD LIGHT IN THE PAST YEAR, BY GENDER AND AGE

Posed to all respondents



OVER THE COURSE OF THE PAST YEAR, HOW OFTEN DID YOU PURCHASE BUD LIGHT / BUDWEISER?

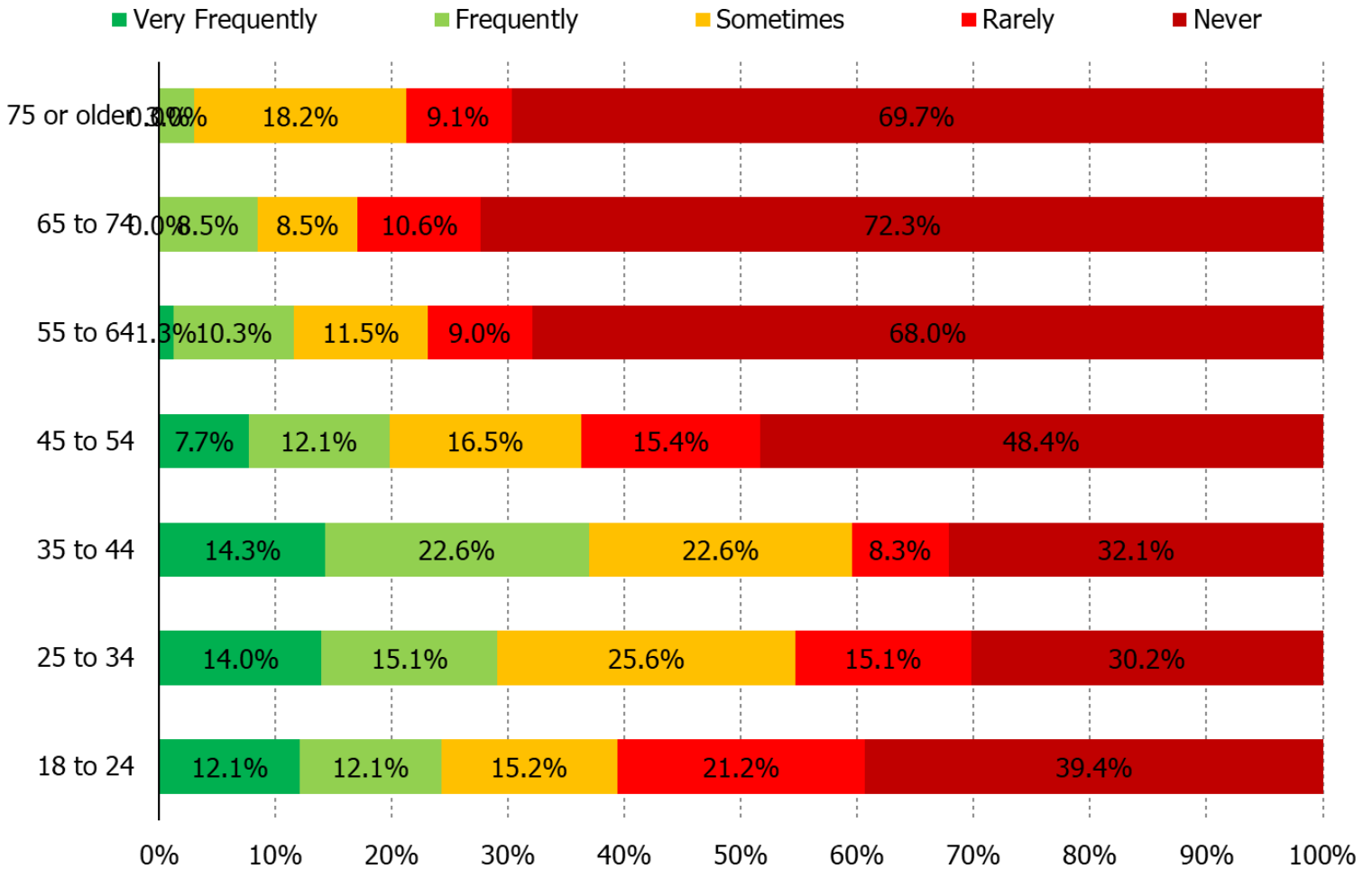
Posed to all respondents



OVER THE COURSE OF THE PAST YEAR, HOW OFTEN DID YOU PURCHASE BUD LIGHT / BUDWEISER?

Posed to all respondents

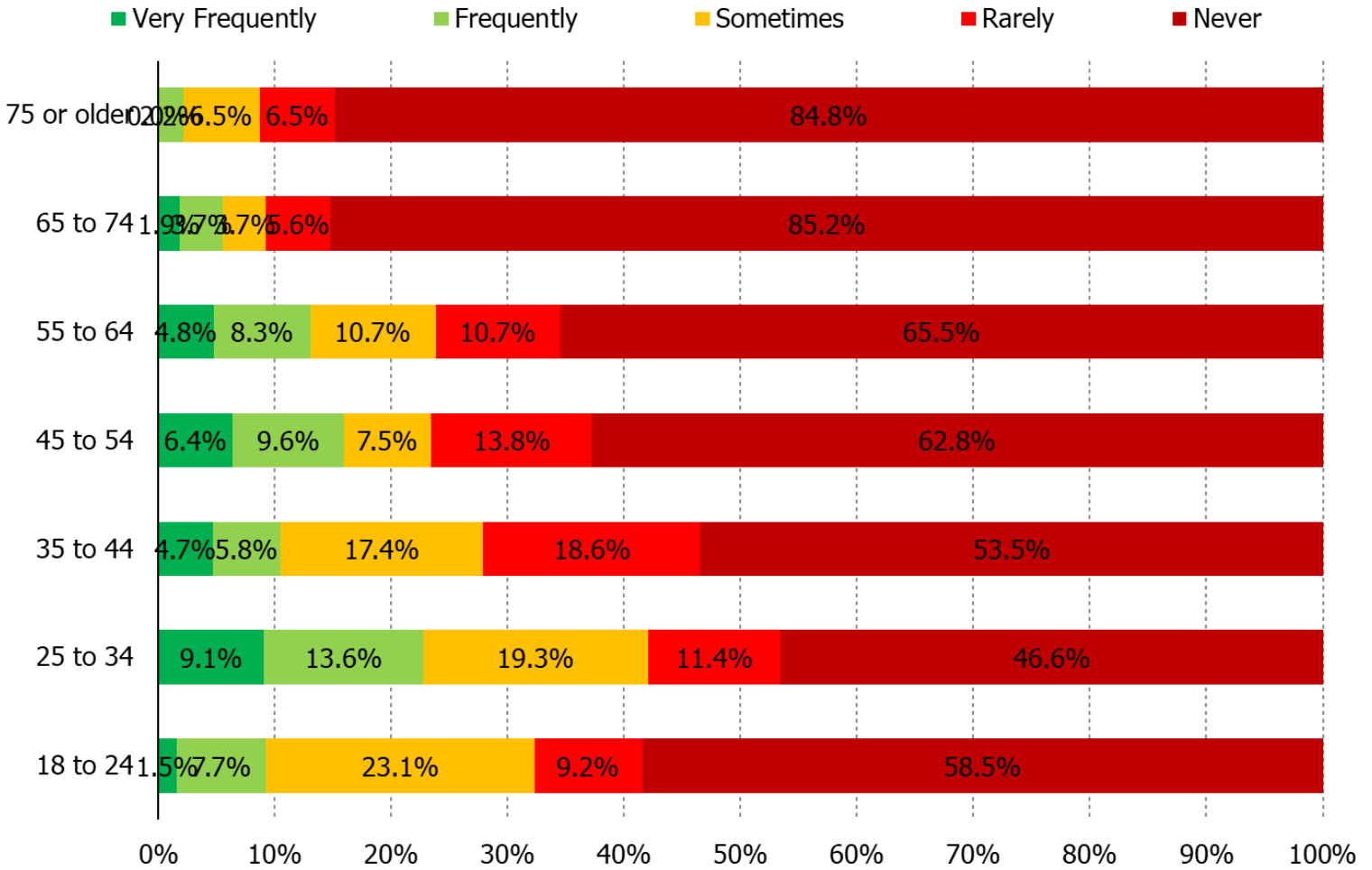
Cross-Tabs: Male, by Age.



OVER THE COURSE OF THE PAST YEAR, HOW OFTEN DID YOU PURCHASE BUD LIGHT / BUDWEISER?

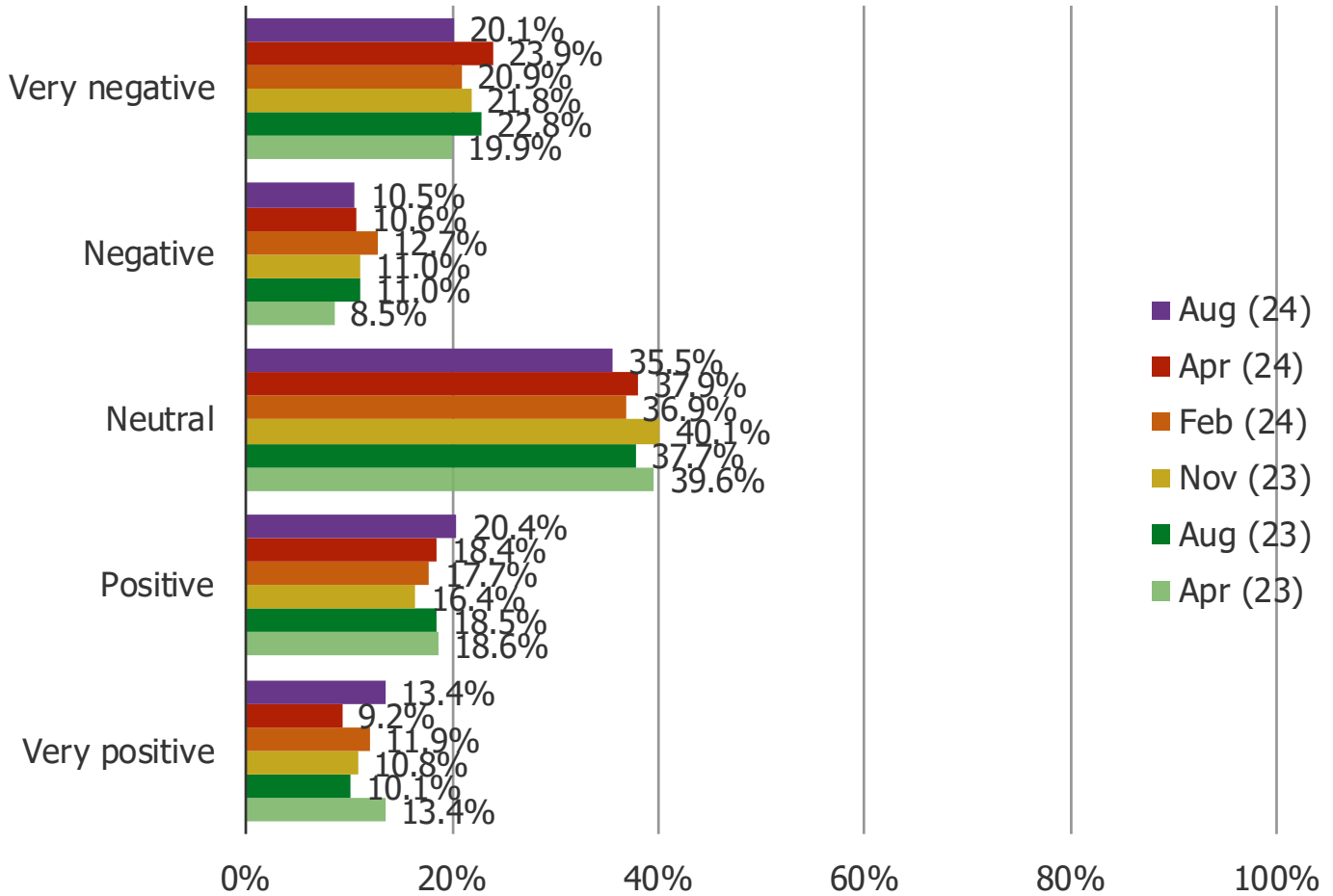
Posed to all respondents

Cross-Tabs: Female, by Age.



WHAT IS YOUR OPINION OF BUD LIGHT / BUDWEISER?

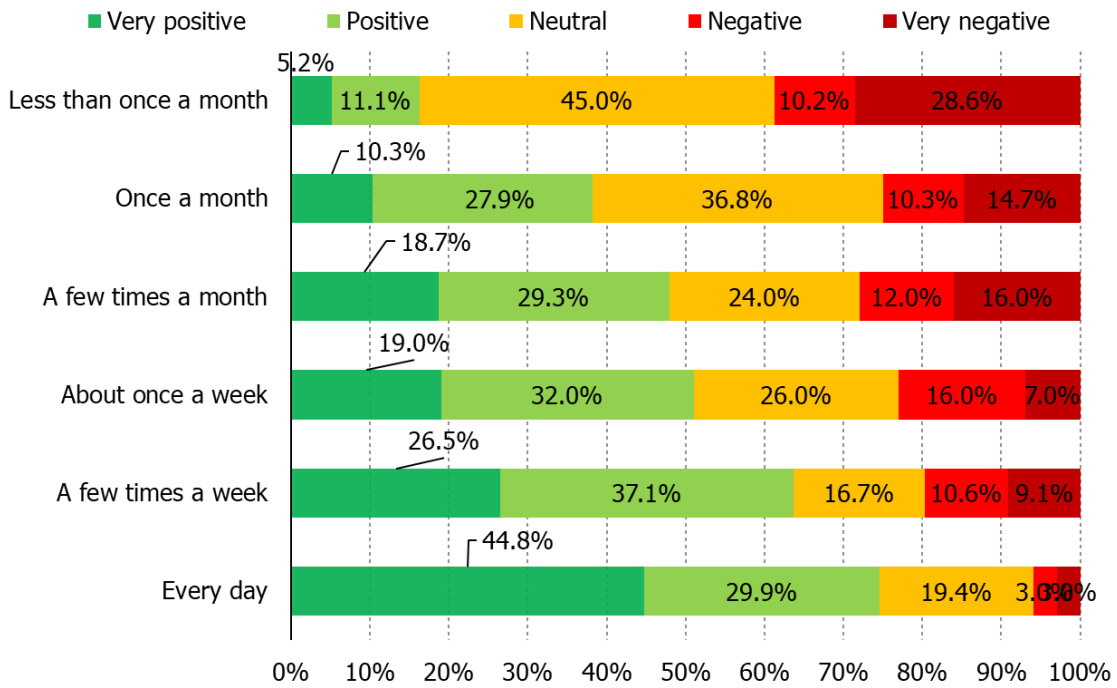
Posed to all respondents



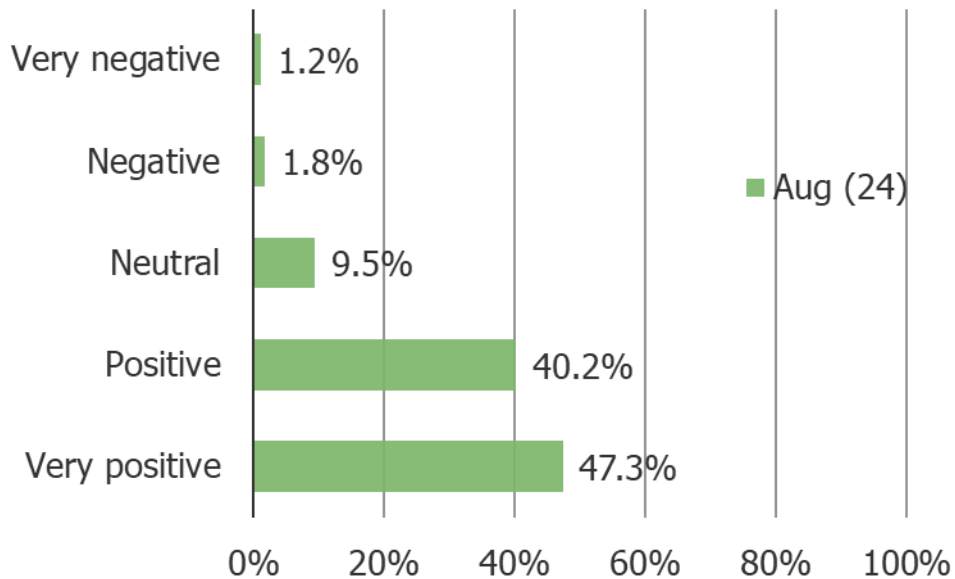
**WHAT IS YOUR OPINION OF BUD LIGHT / BUDWEISER?**

Posed to all respondents

Cross-Tab: By how often respondents drink beer



Filter: In the past year purchased Bud Light frequently or very frequently.

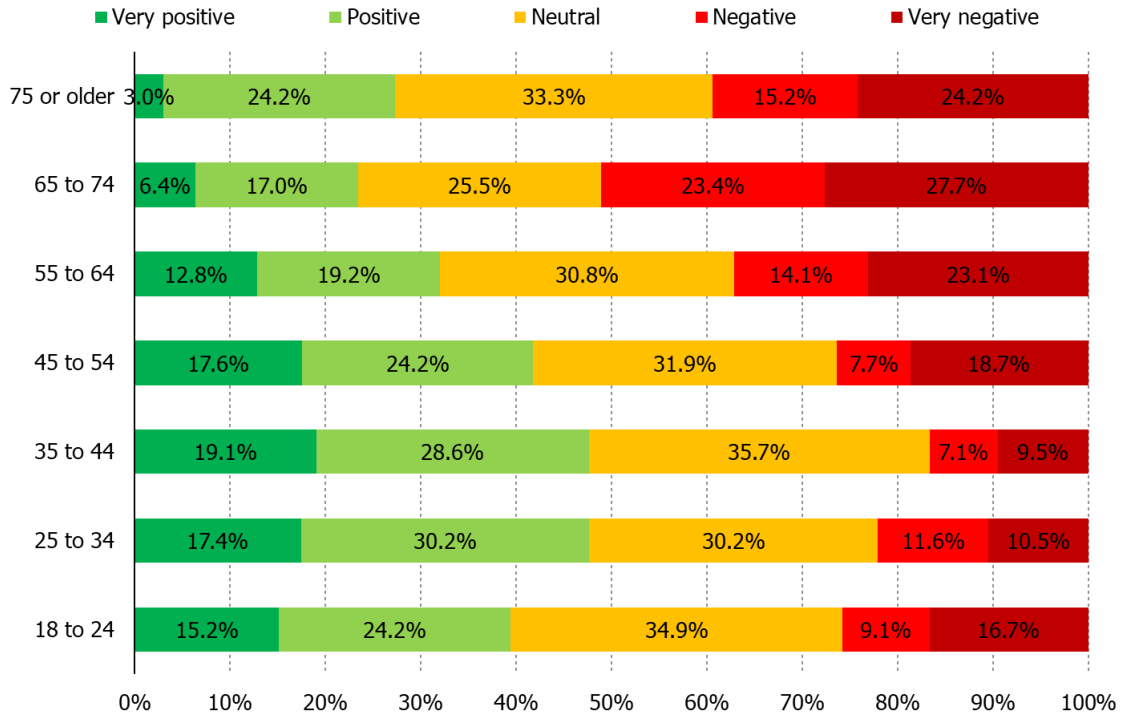




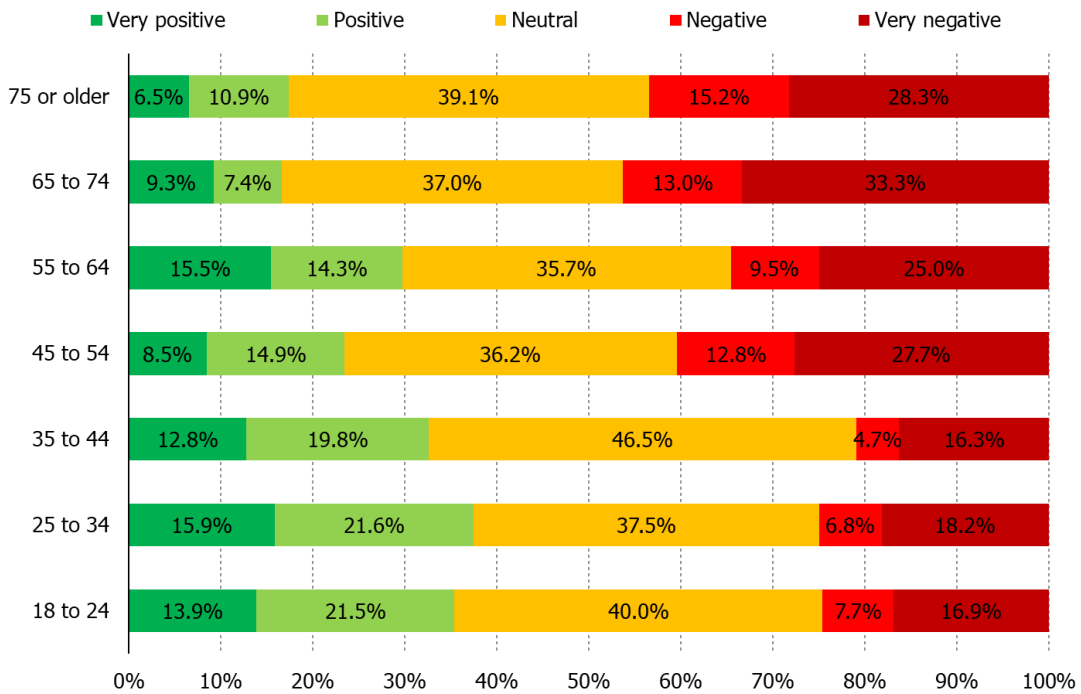
WHAT IS YOUR OPINION OF BUD LIGHT / BUDWEISER?

Posed to all respondents

Cross-Tab: Male and age

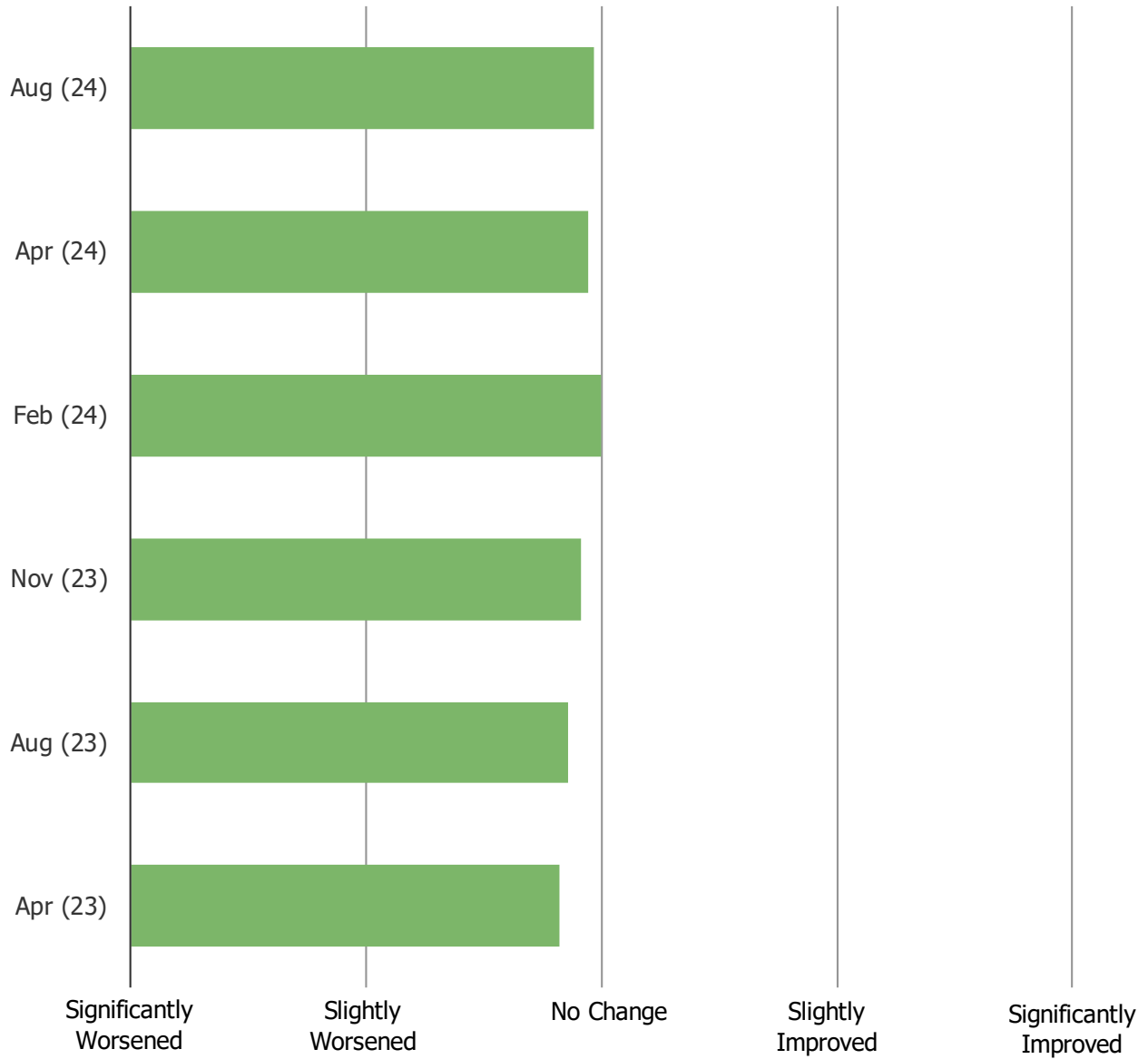


Cross-Tab: Female and age



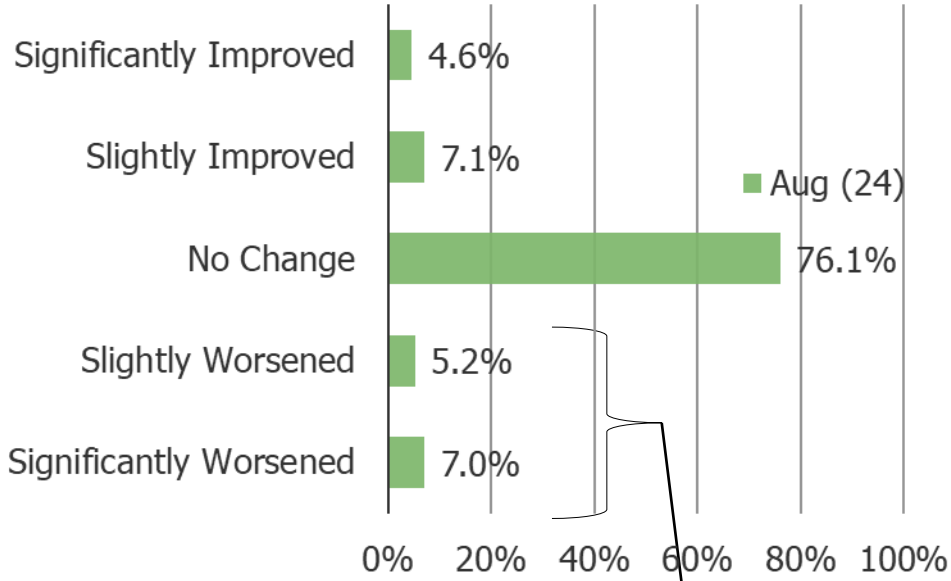
HAS YOUR OPINION OF BUD LIGHT / BUDWEISER CHANGED IN THE PAST MONTH?

Posed to all respondents



HAS YOUR OPINION OF BUD LIGHT / BUDWEISER CHANGED IN THE PAST MONTH?

Posed to all respondents



Why?

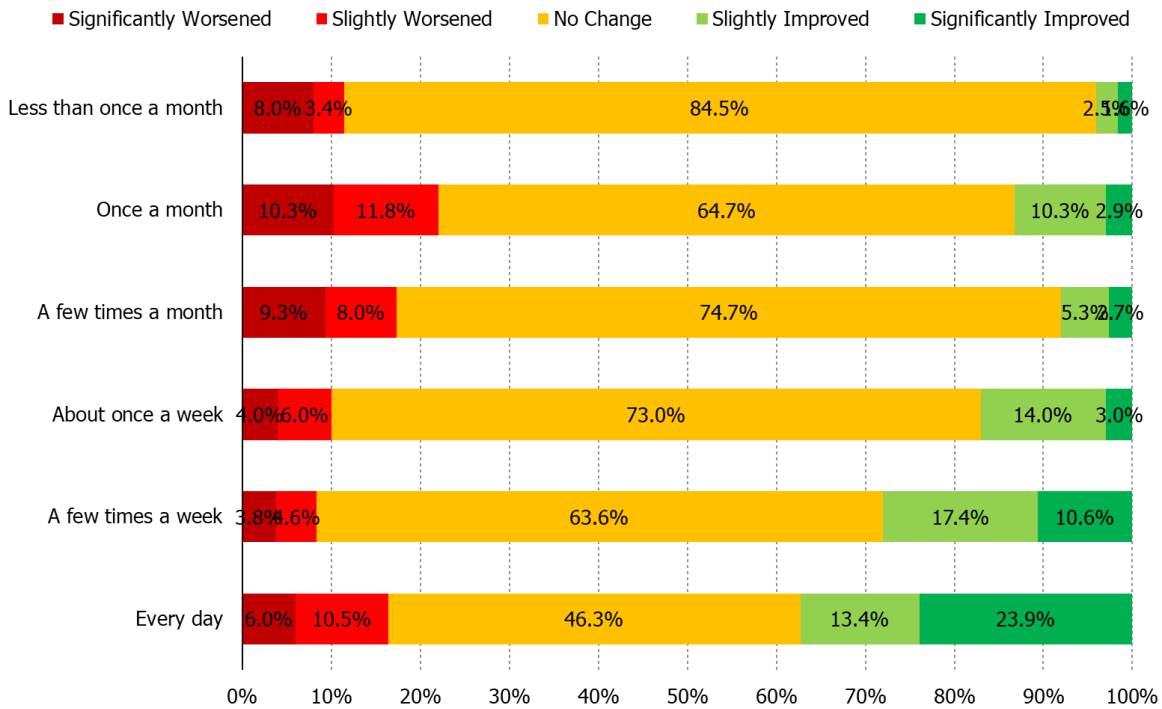
August 2024 Fill-Ins



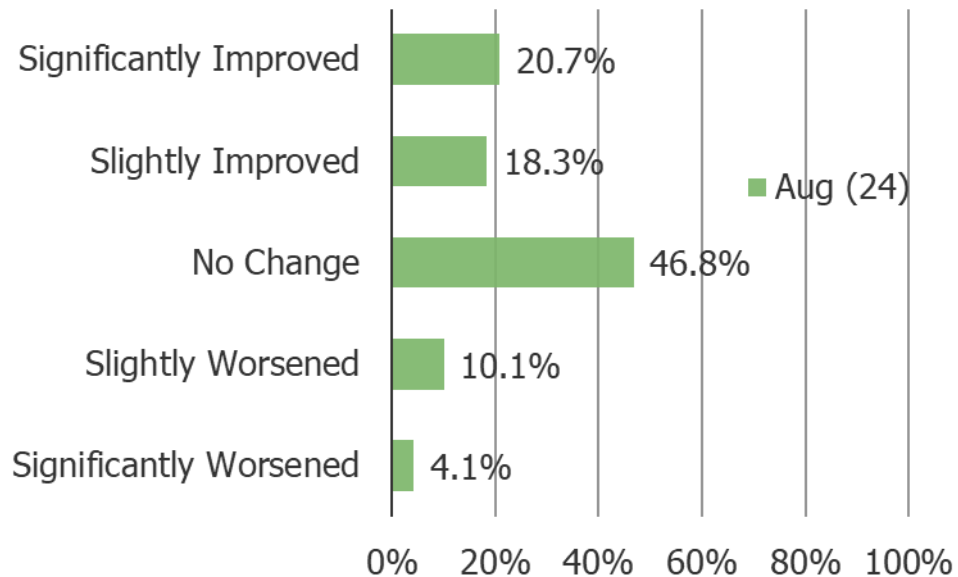
HAS YOUR OPINION OF BUD LIGHT / BUDWEISER CHANGED IN THE PAST MONTH?

Posed to all respondents

Cross-Tab: By how often respondents drink beer



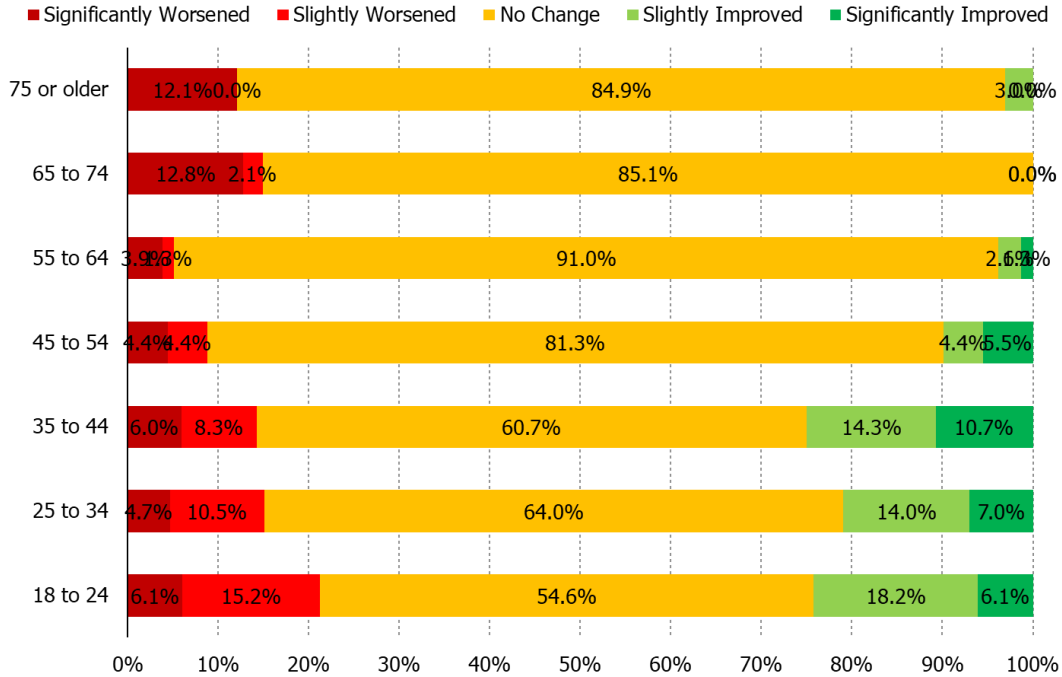
Filter: In the past year purchased Bud Light frequently or very frequently.



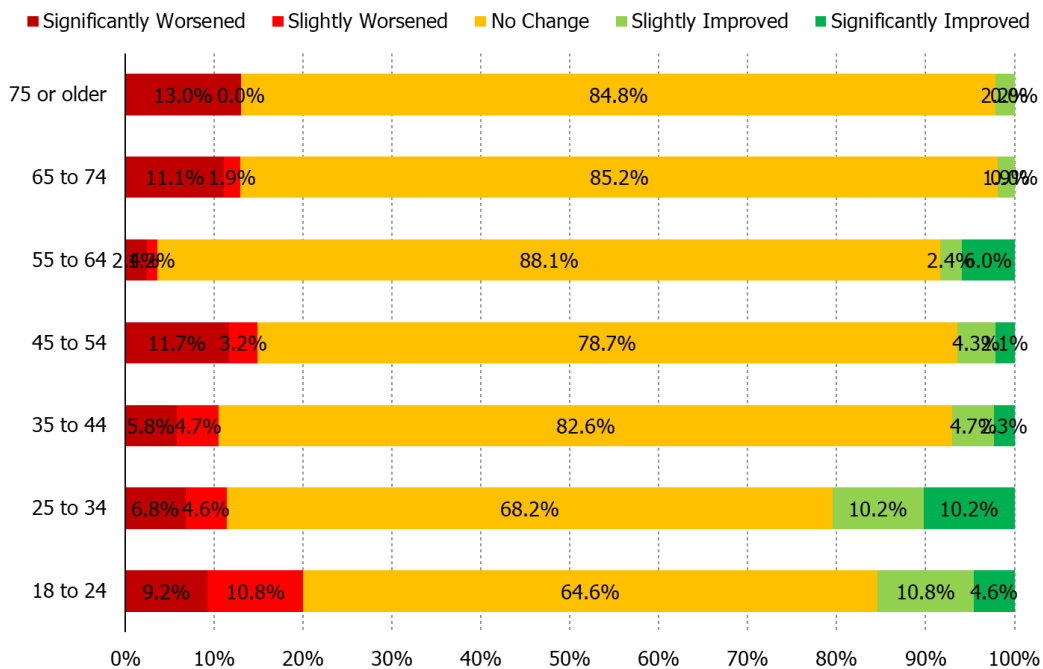
HAS YOUR OPINION OF BUD LIGHT / BUDWEISER CHANGED IN THE PAST MONTH?

Posed to all respondents

Cross-Tab: Male and age

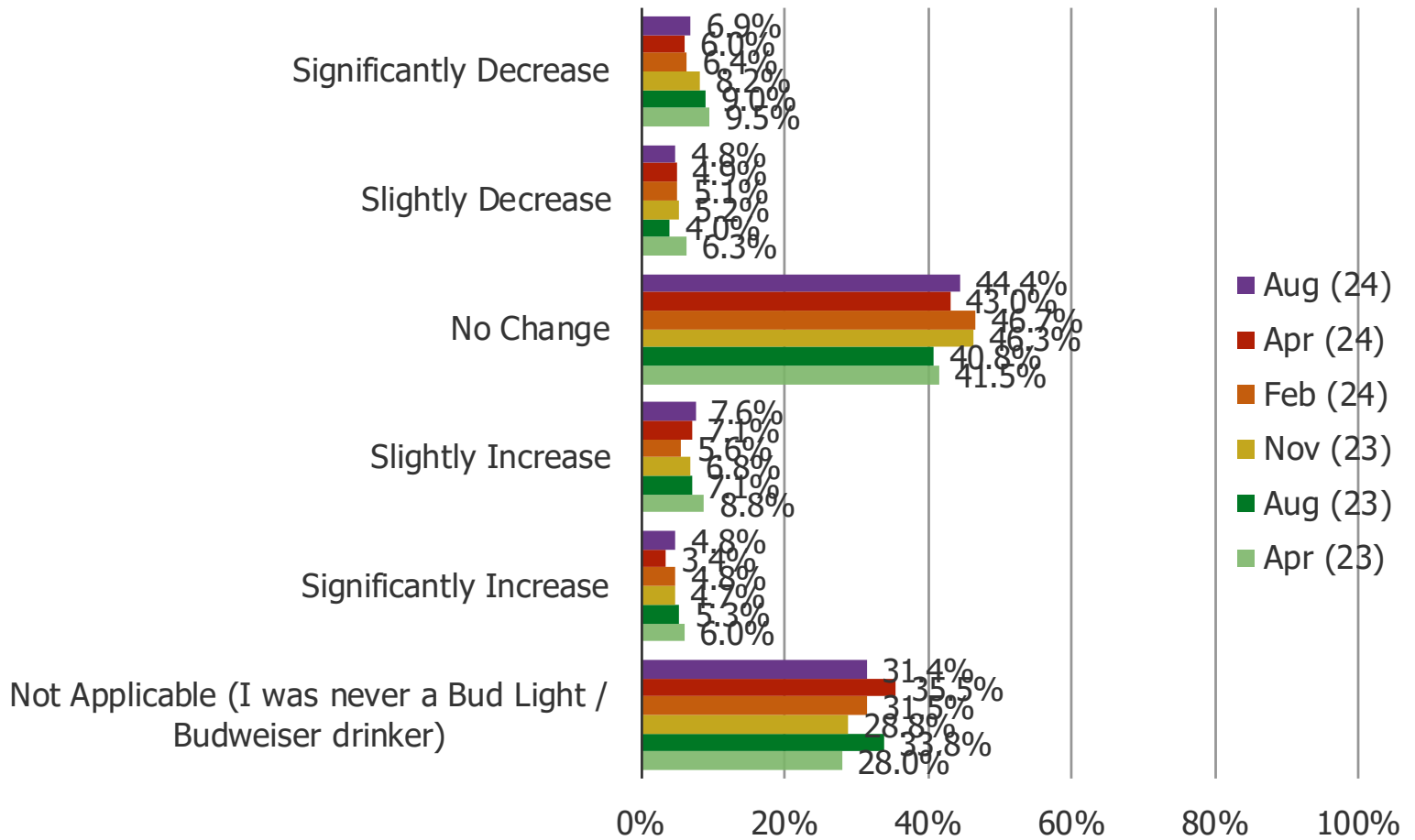


Cross-Tab: Female and age



**DOING FORWARD, WILL YOU WILL INCREASE OR DECREASE YOUR PURCHASING OF BUD LIGHT / BUDWEISER?**

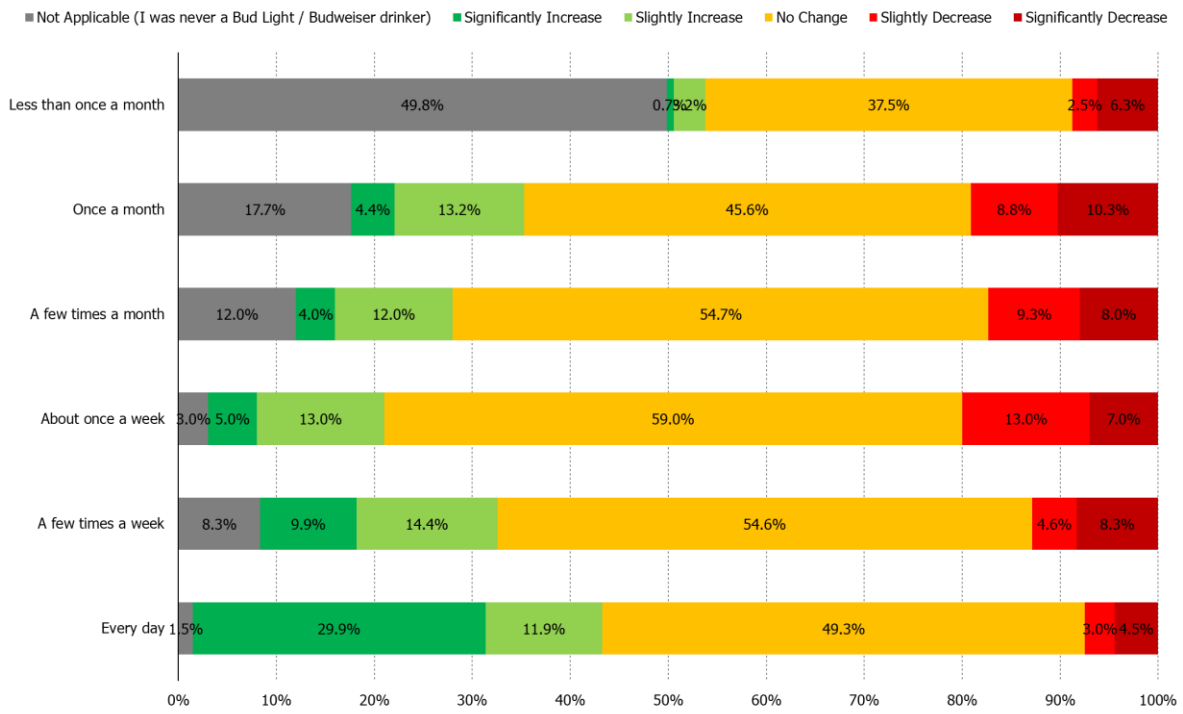
Posed to all respondents



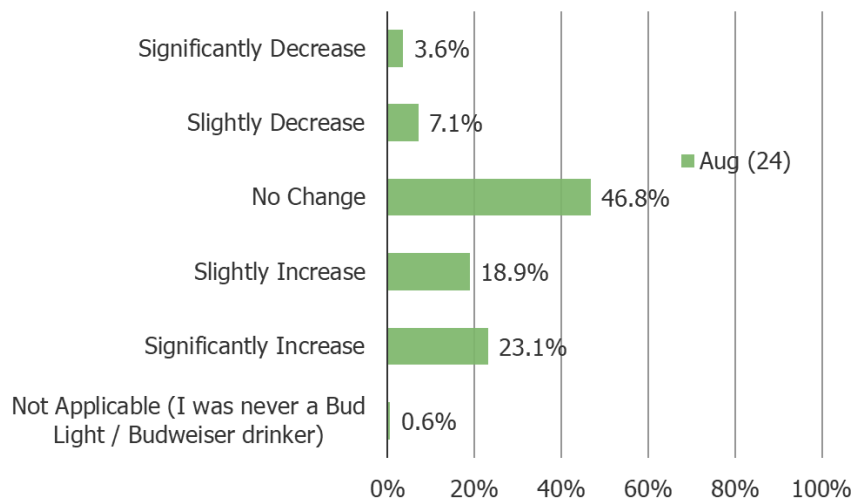
DOING FORWARD, WILL YOU WILL INCREASE OR DECREASE YOUR PURCHASING OF BUD LIGHT / BUDWEISER?

Posed to all respondents

Cross-Tab: By how often respondents drink beer



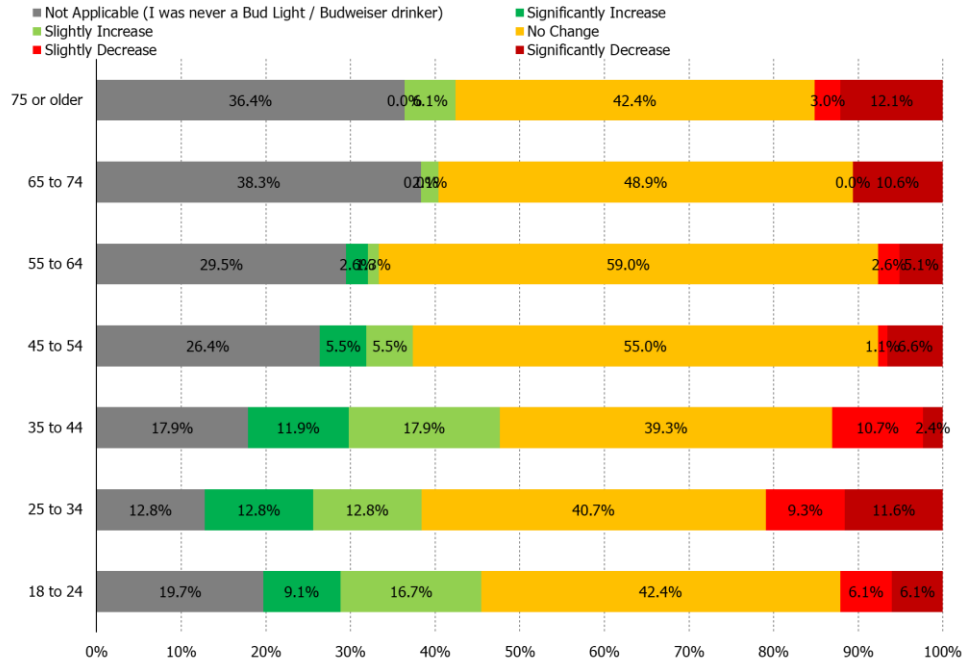
Filter: In the past year purchased Bud Light frequently or very frequently.



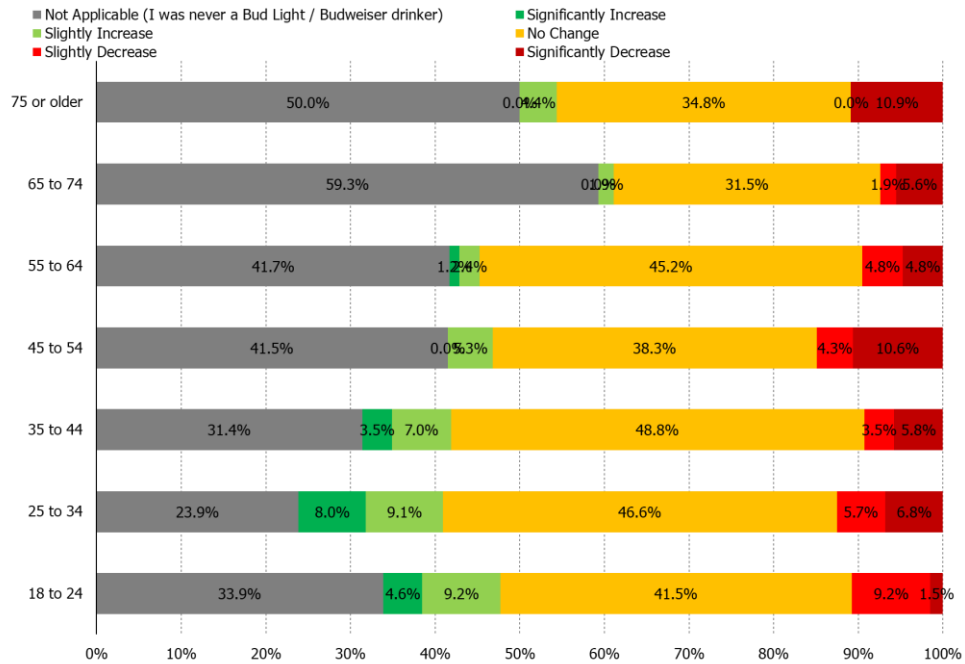
GOING FORWARD, WILL YOU WILL INCREASE OR DECREASE YOUR PURCHASING OF BUD LIGHT / BUDWEISER?

Posed to all respondents

Cross-Tab: Male and age



Cross-Tab: Female and age





ARE THERE ANY OTHER BEER BRANDS YOU WILL BUY MORE OFTEN IN PLACE OF WHAT YOU WOULD HAVE SPENT ON BUD LIGHT / BUDWEISER?

Posed to all respondents who would decrease purchases of Bud Light/Budweiser.

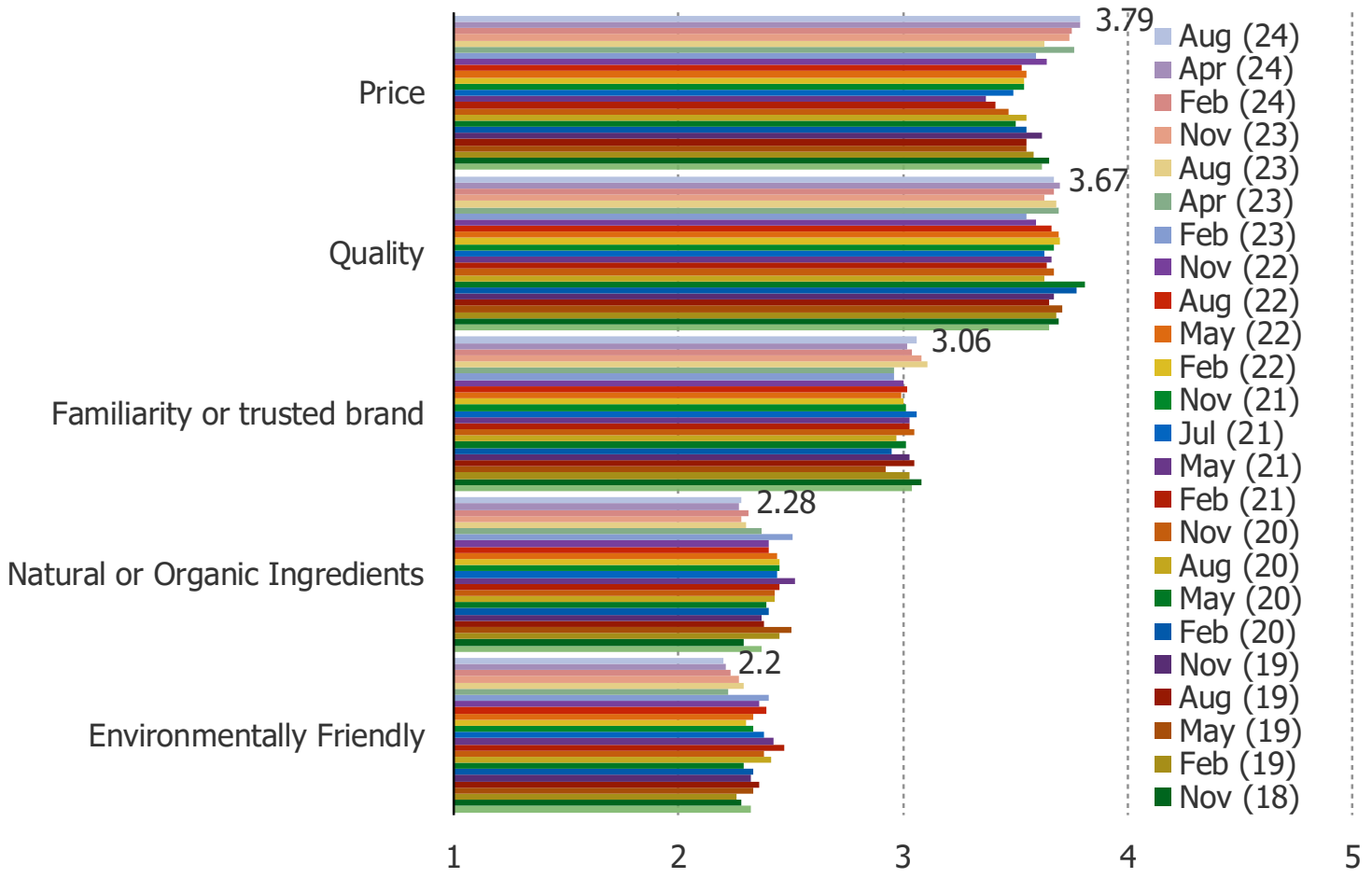


Dauids vs. Goliaths

CPGS OVERALL

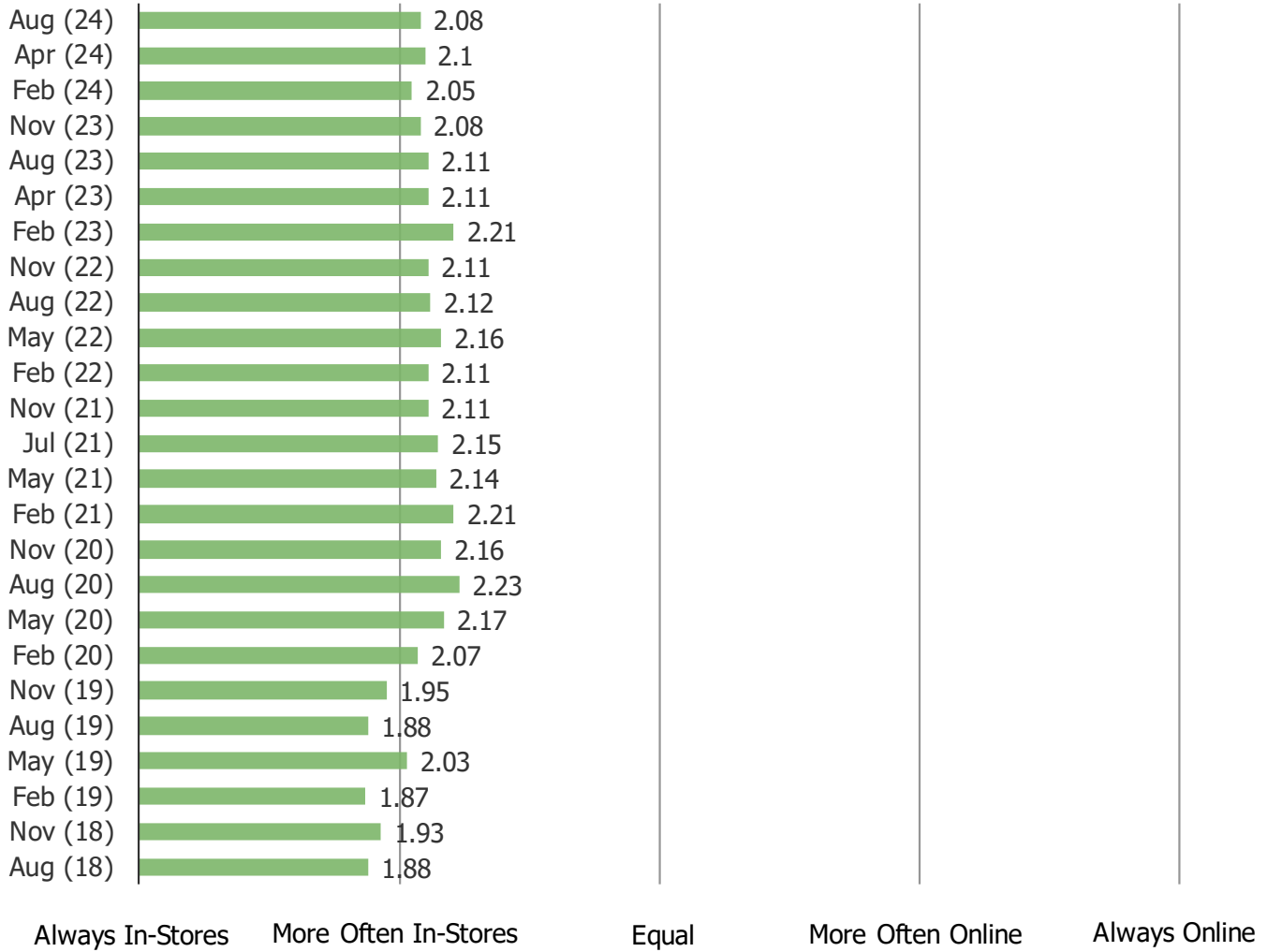
PLEASE RANK WHICH ARE MOST IMPORTANT TO YOU WHEN IT COMES TO PURCHASING PERSONAL CARE AND HOUSEHOLD ITEMS.

Posed to all respondents



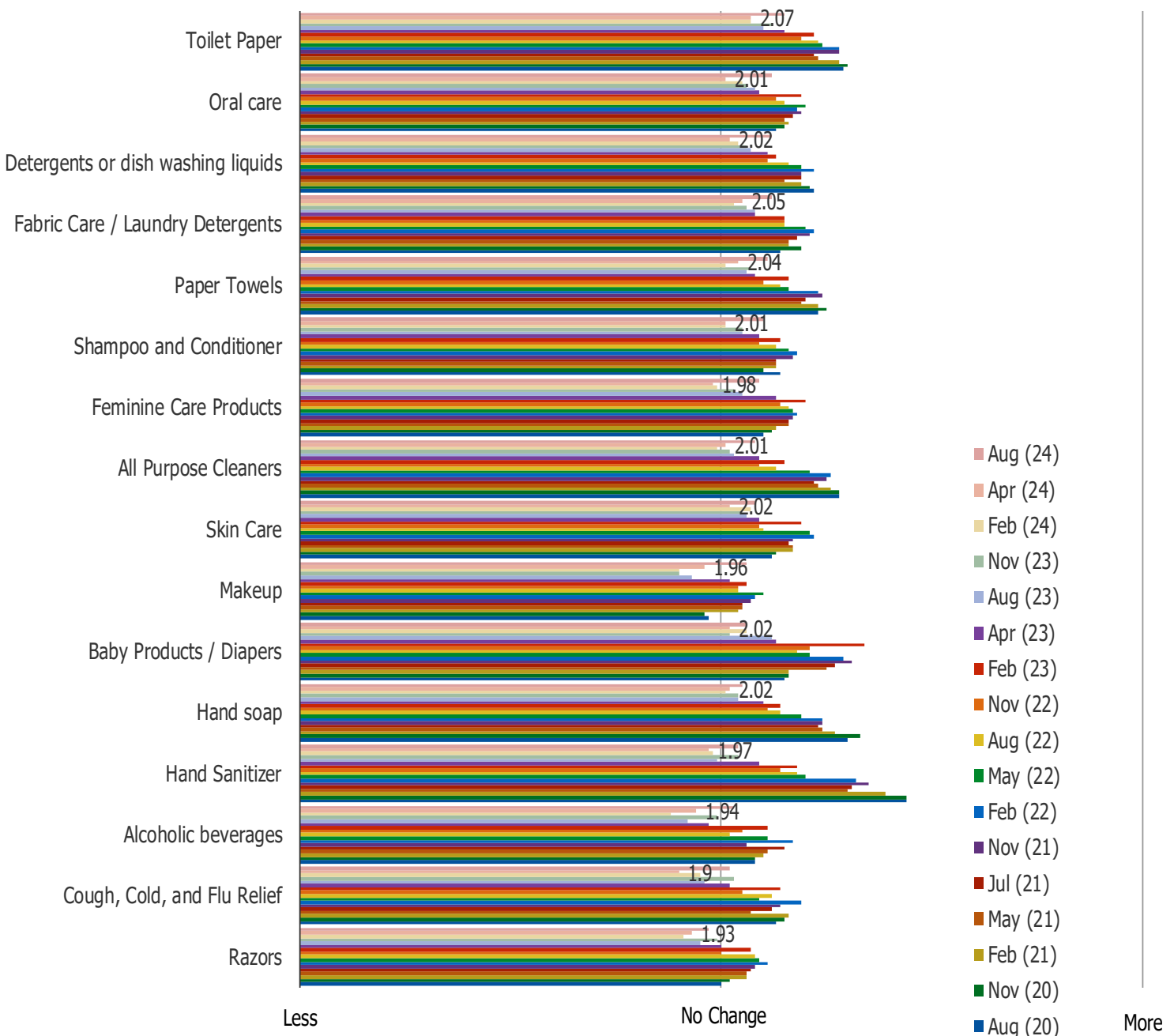
WHERE DO YOU BUY HOUSEHOLD AND PERSONAL CARE ITEMS?

Posed to all respondents



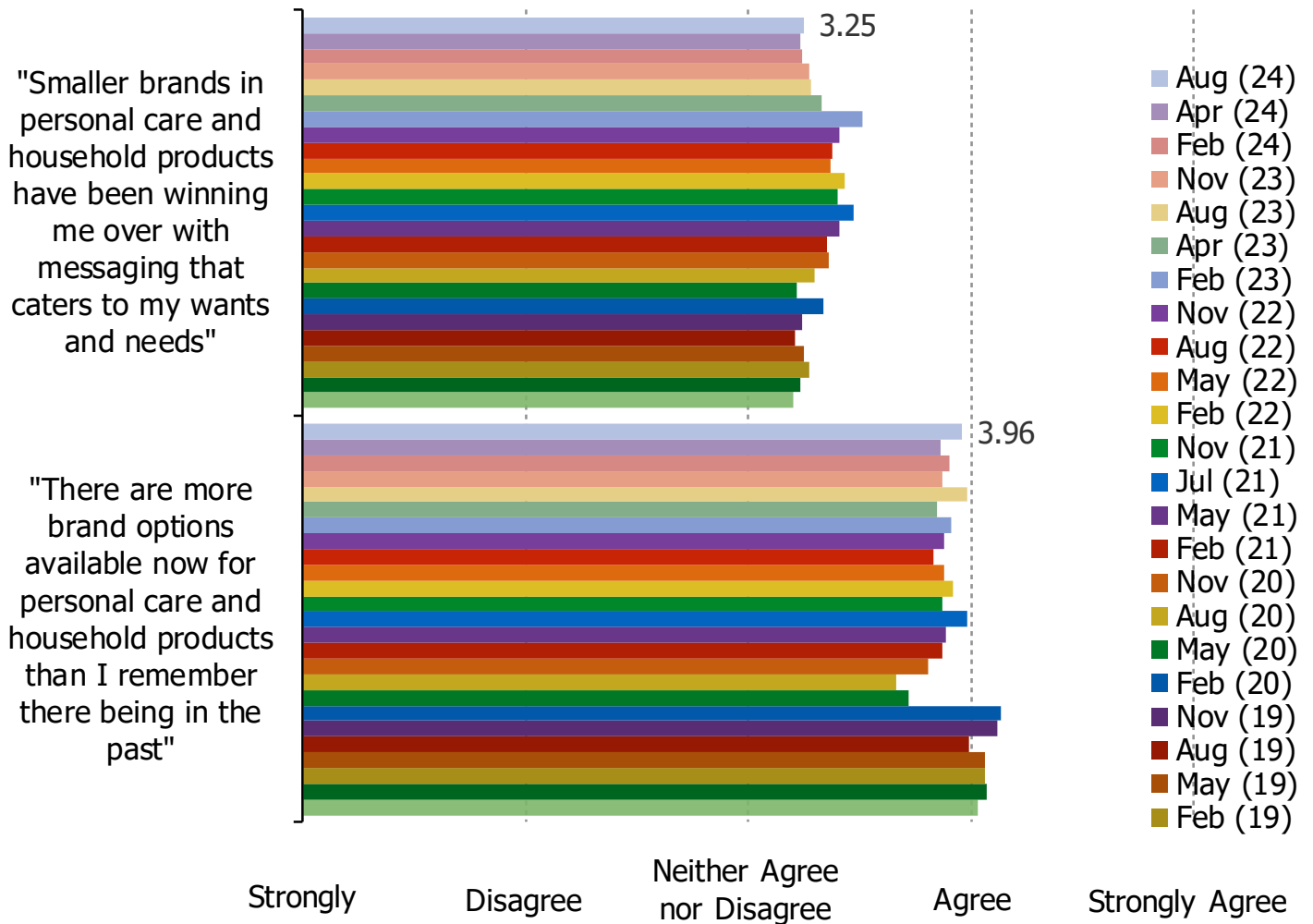
**GOING FORWARD, DO YOU EXPECT TO SPEND MORE OR LESS THAN NORMAL ON THE FOLLOWING PRODUCTS?**

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



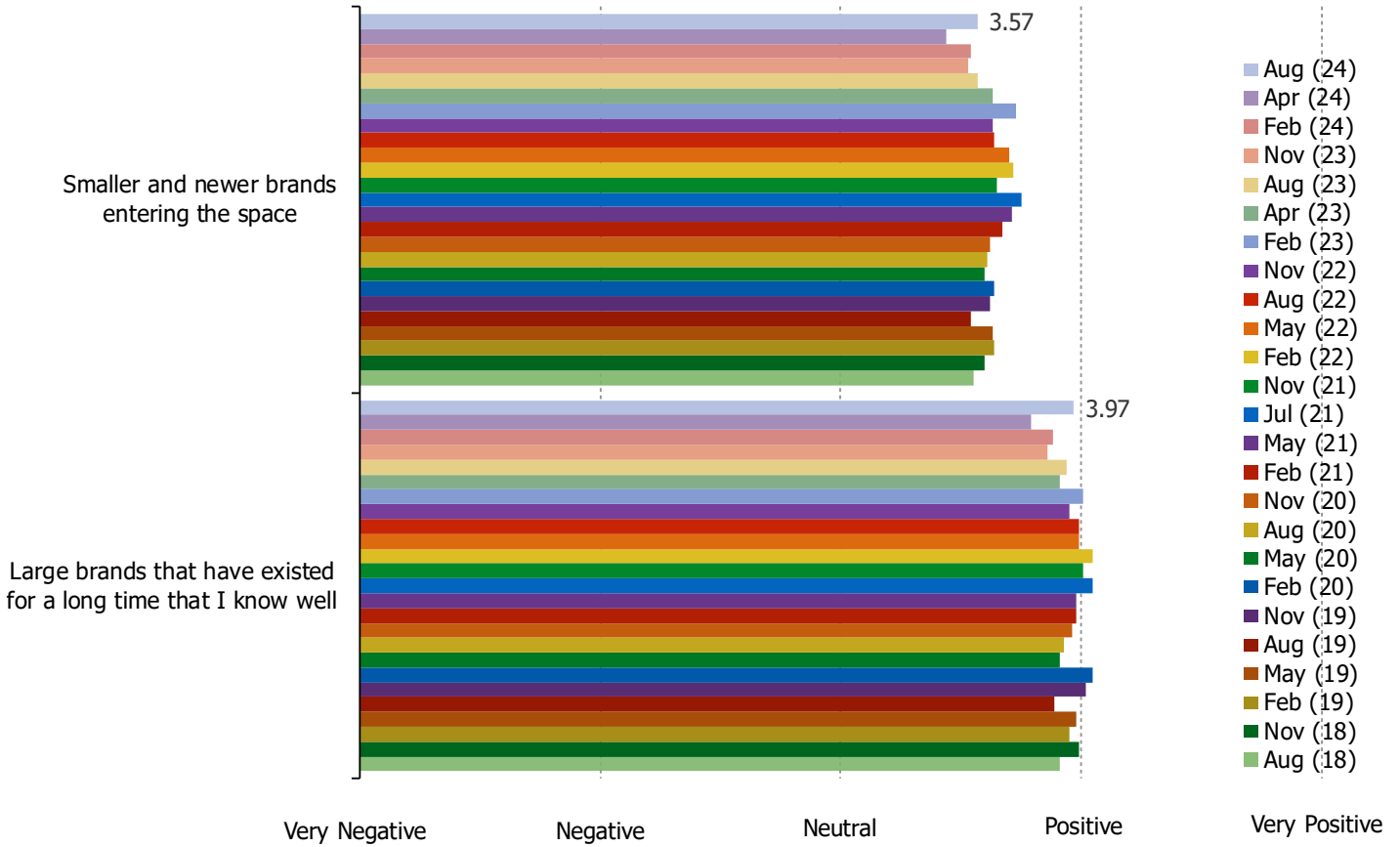
HOW MUCH DO YOU AGREE WITH THE FOLLOWING STATEMENTS?

Posed to all respondents



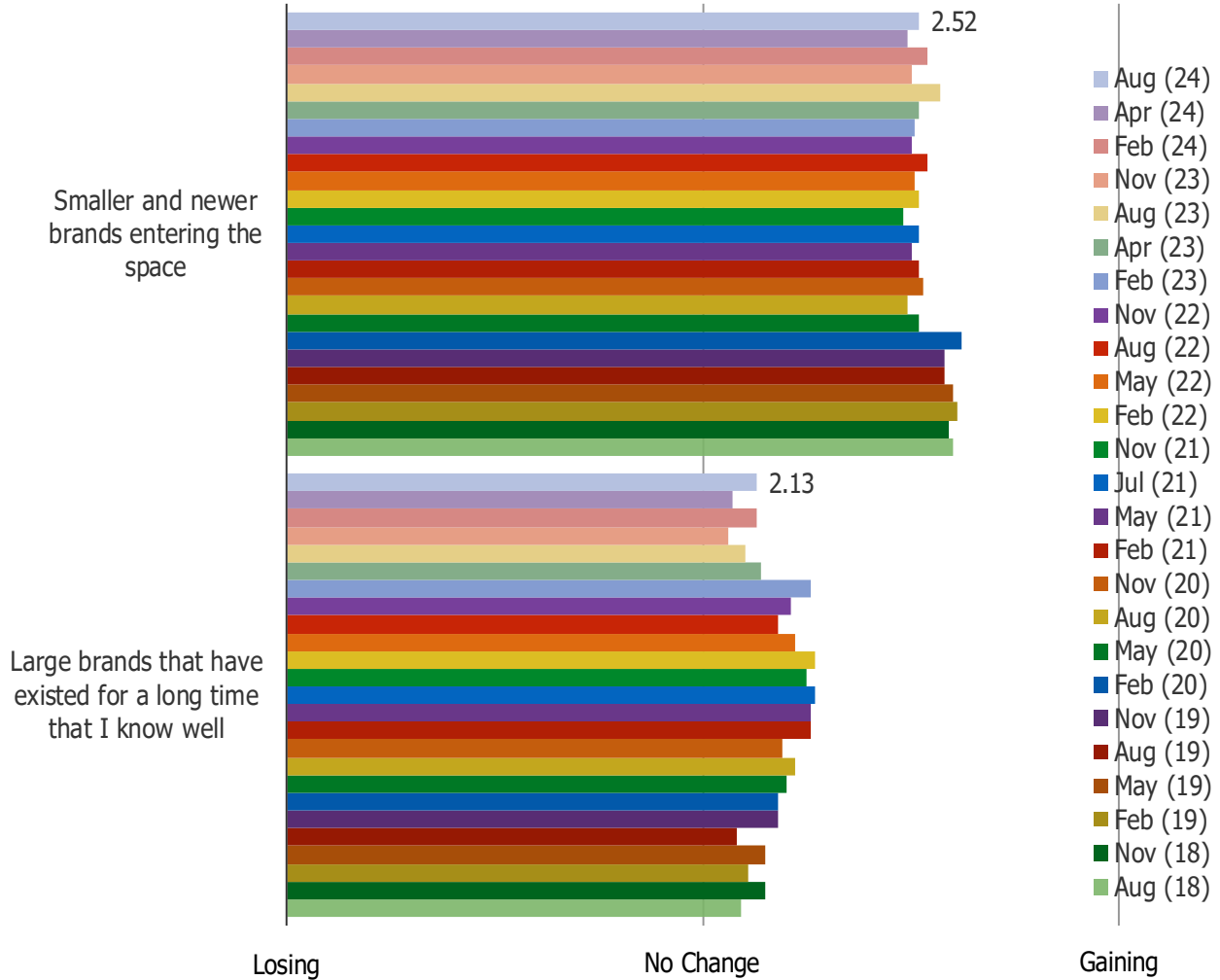
WHEN IT COMES TO HOUSEHOLD AND PERSONAL CARE PRODUCTS, WHAT IS YOUR OPINION OF THE FOLLOWING?

Posed to all respondents



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

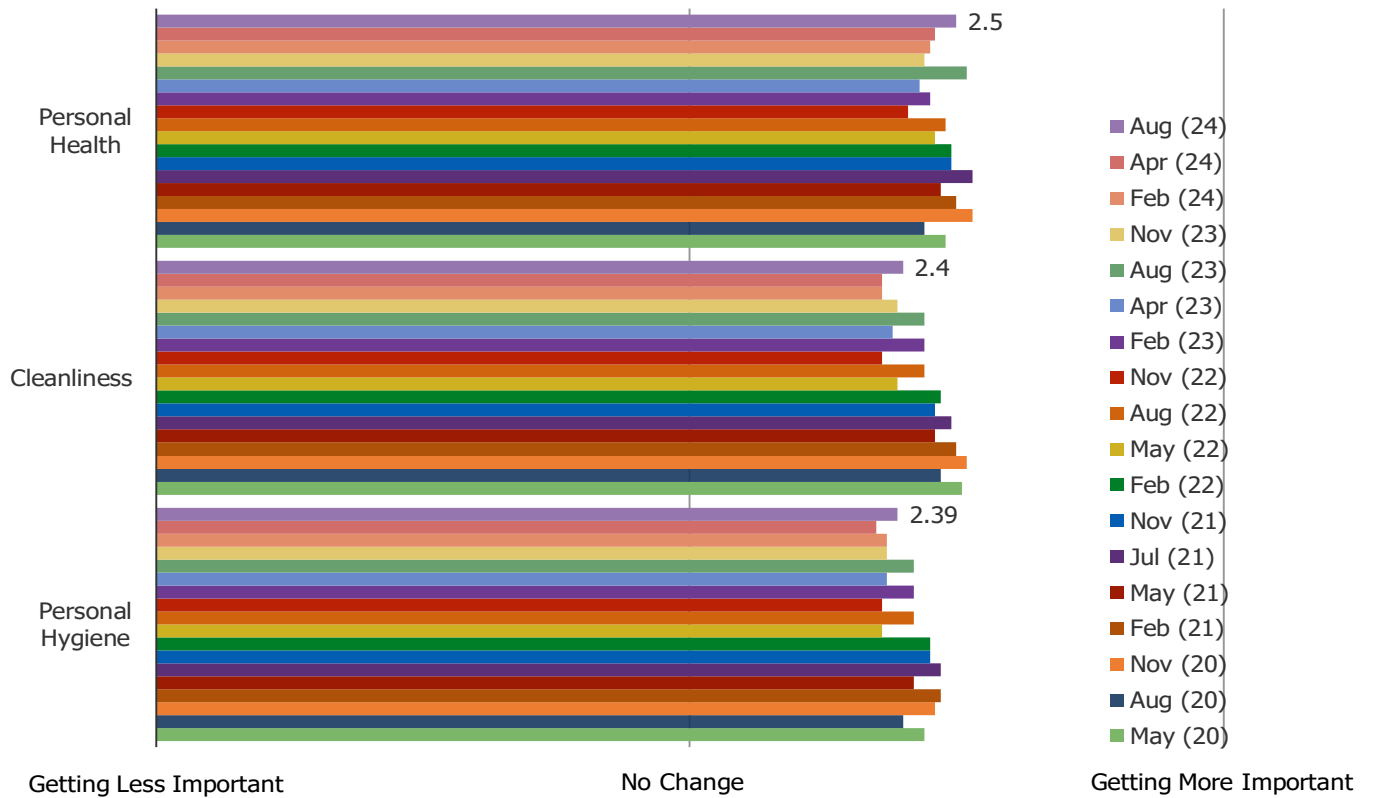
Posed to all respondents





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

Posed to all respondents.

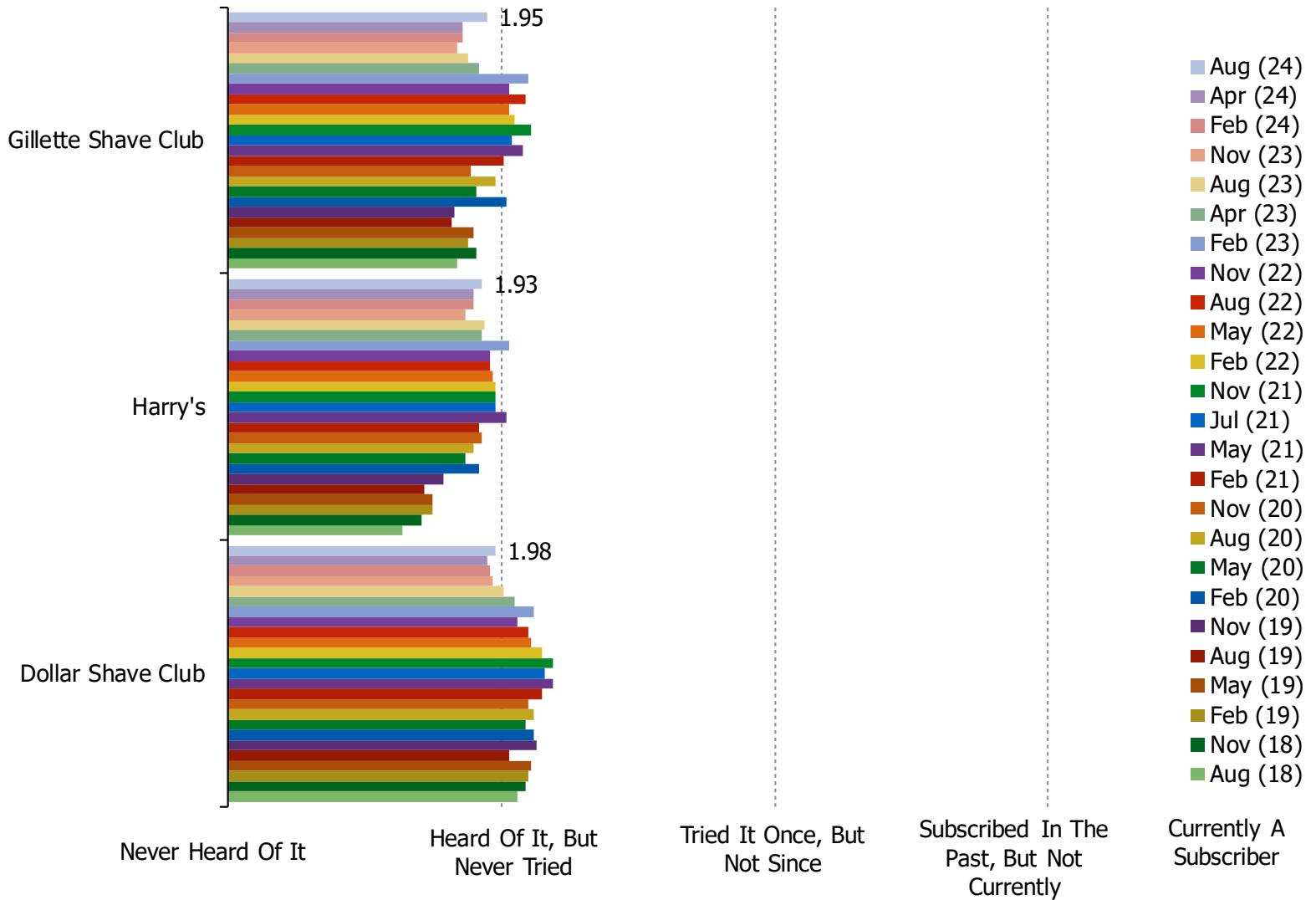


Davids vs. Goliaths

GILLETTE

WHAT IS YOUR EXPERIENCE WITH THE FOLLOWING SHAVE CLUBS?

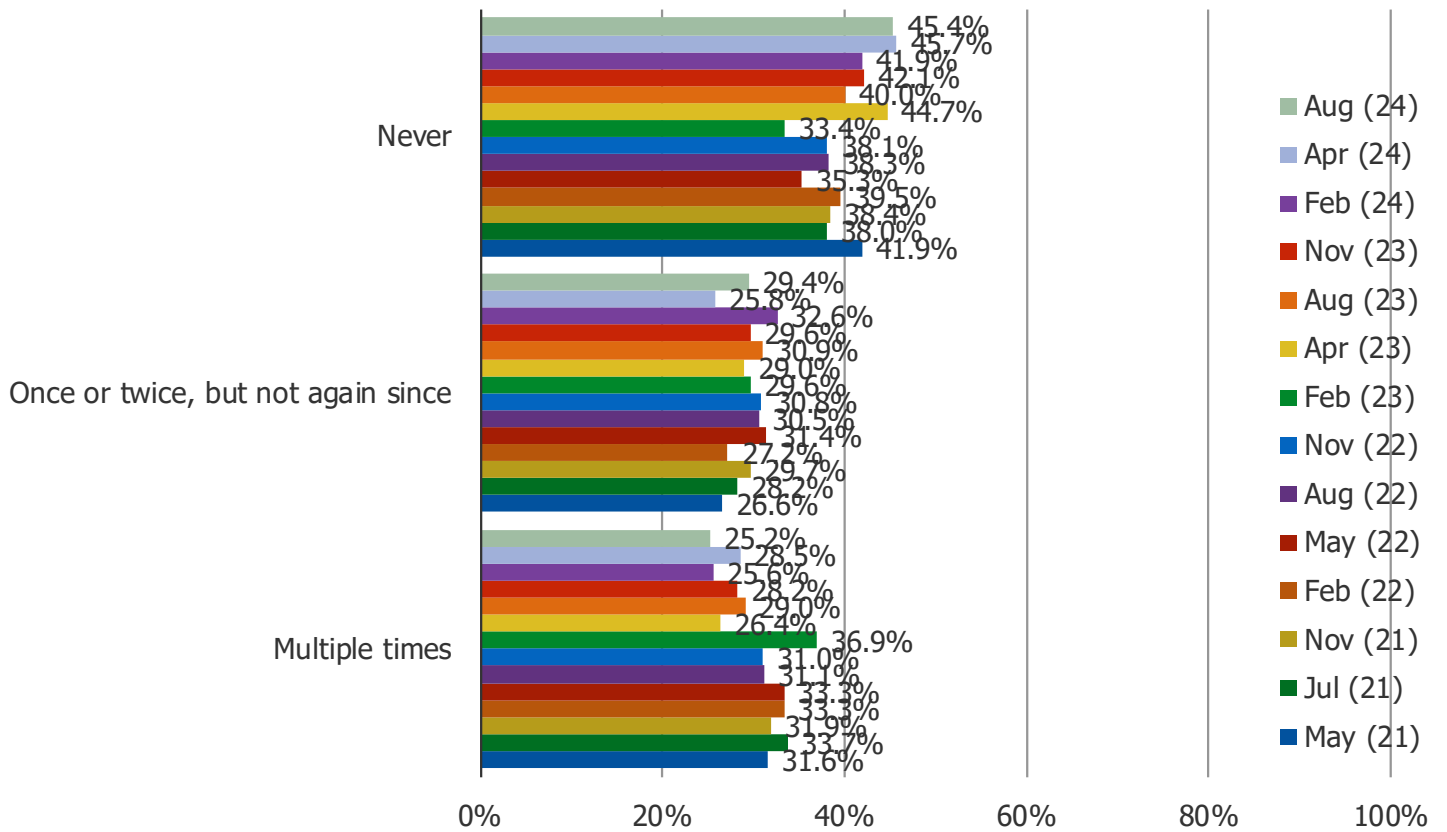
Posed to respondents who make purchase decisions on razors



## HARD SELTZER

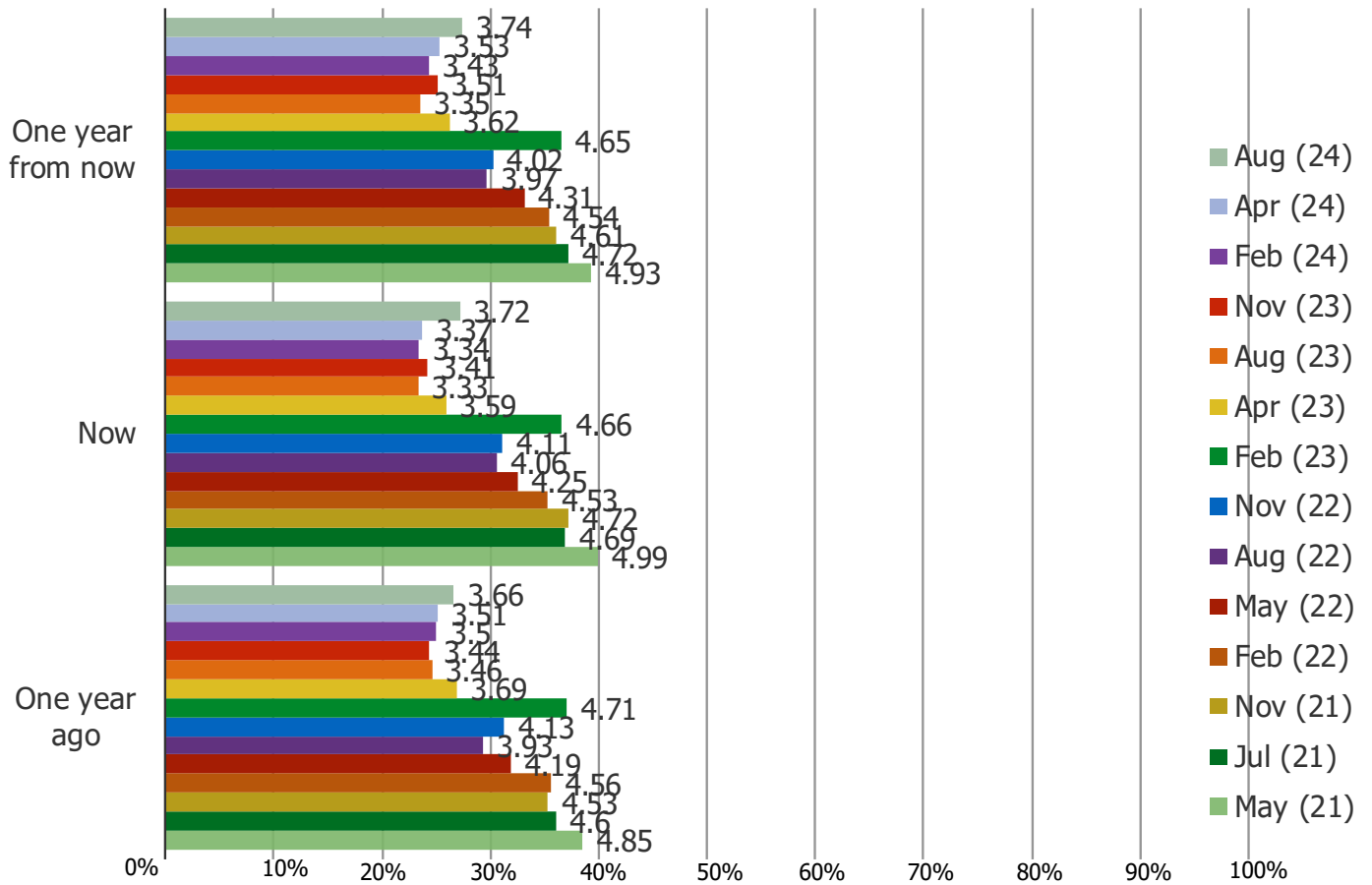
HAVE YOU EVER CONSUMED HARD SELTZER BEVERAGES? IE - CARBONATED WATER/SELTZER BEVERAGES WITH ALCOHOL IN IT.

Posed to all respondents.



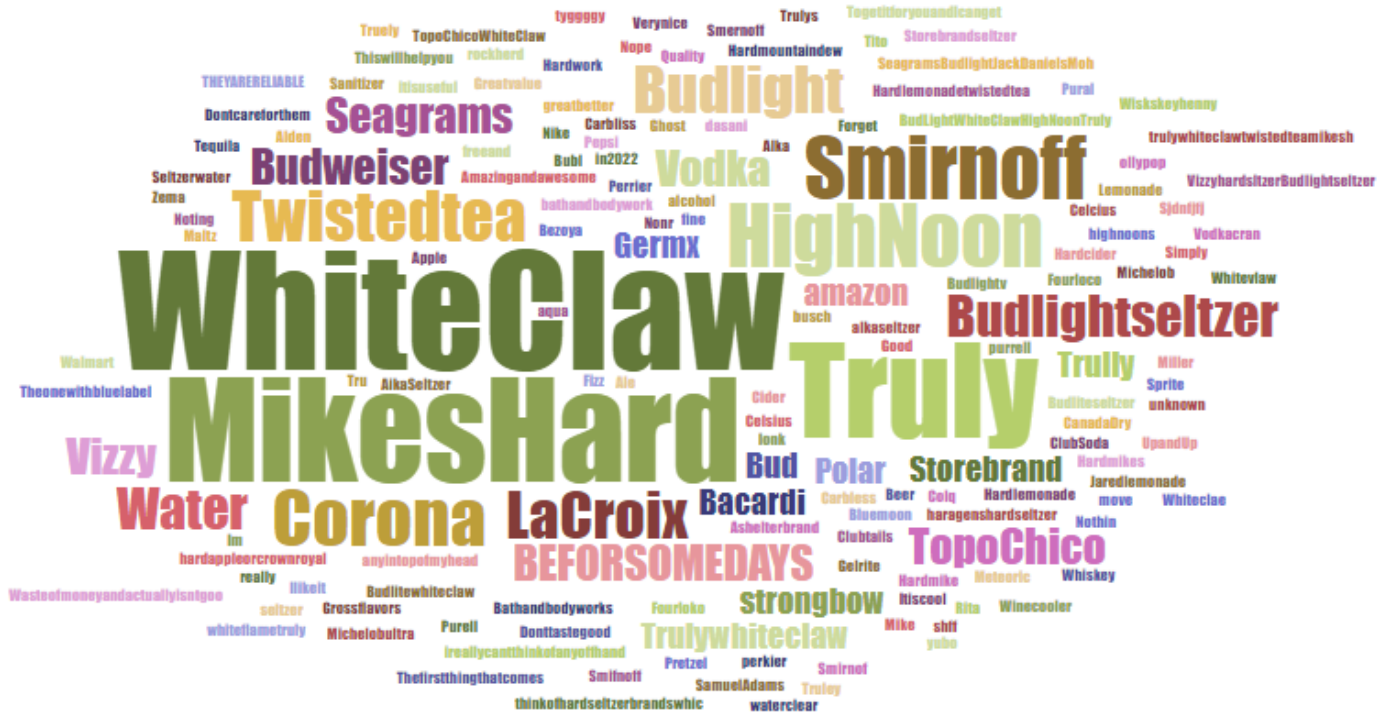
WHAT PERCENTAGE OF YOUR ALCOHOL CONSUMPTION WOULD YOU ESTIMATE GOES TO HARD SELTZER?

Posed to all respondents who have consumed hard seltzer (N = 546).



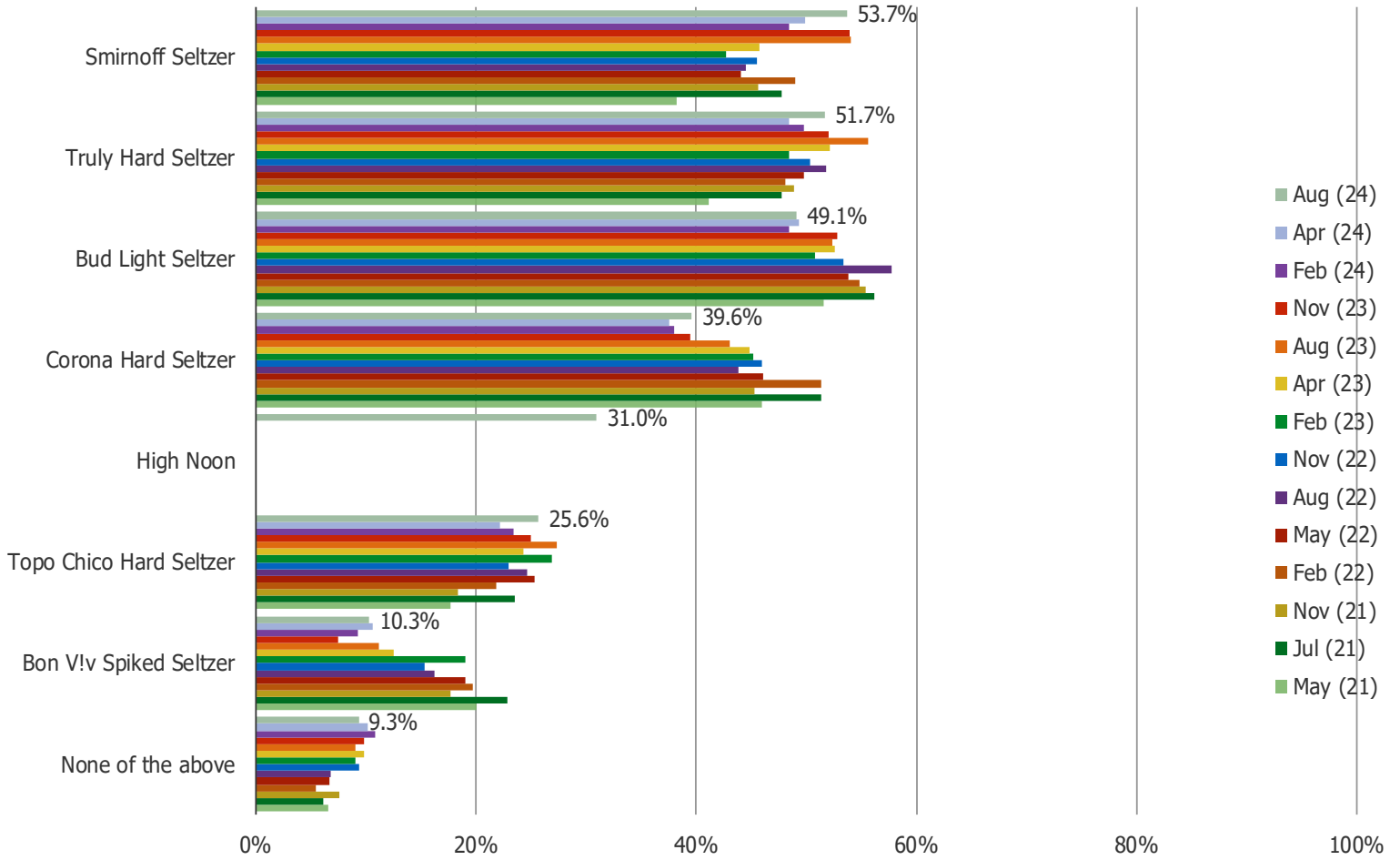
WHEN YOU THINK OF HARD SELTZER BRANDS, WHICH COMES TO MIND FIRST?

Posed to all respondents who have consumed hard seltzer (N = 546).



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

Posed to all respondents who have consumed hard seltzer (N = 546).





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 = 546).

