

Bespoke Survey Research

November 2024

CPGs, Beer, and Hard Seltzer

Volume 26 | Quarterly Survey

1,250 US Consumers Balanced To Census

Tickers Covered: PG, SAM, BUD, STZ.

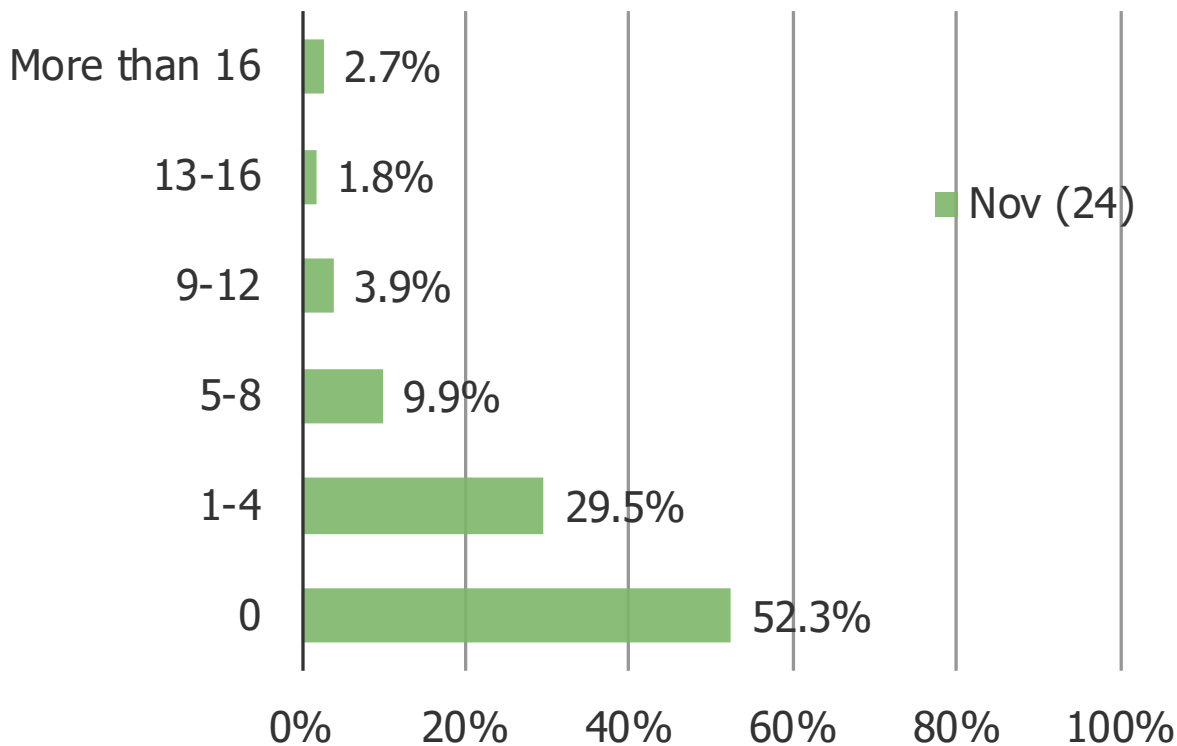
Key Takeaways:

- ❑ Consumers appear to suggest a reduction in their alcohol consumption y/y. By category, consumers were the most likely to say they are reducing the share of their alcohol consumption that goes to Spirits.
- ❑ Consumers have heavily shifted their attention to pricing over everything else when it comes to purchasing personal care and household items. During the same period of time, natural / organic / environmentally friendly has become less important to them.
- ❑ This quarter, we asked consumers about chocolate/candy preferences. Focusing on Feastables, Feastables awareness was the lowest of the peer group we asked about. Those who are familiar with Feastables had a net neutral to positive opinion of the product.
- ❑ Reese's, Hershey's, and M&M's had the highest consumer opinions relative to key competitors.
- ❑ On non-alcoholic beer, the share who know about Athletic Brewing Company non-alcoholic beer has increased q/q.
- ❑ The share who have tried Athletic Brewing Company non-alcoholic beer has increased slightly sequentially.

NEW QUESTIONS

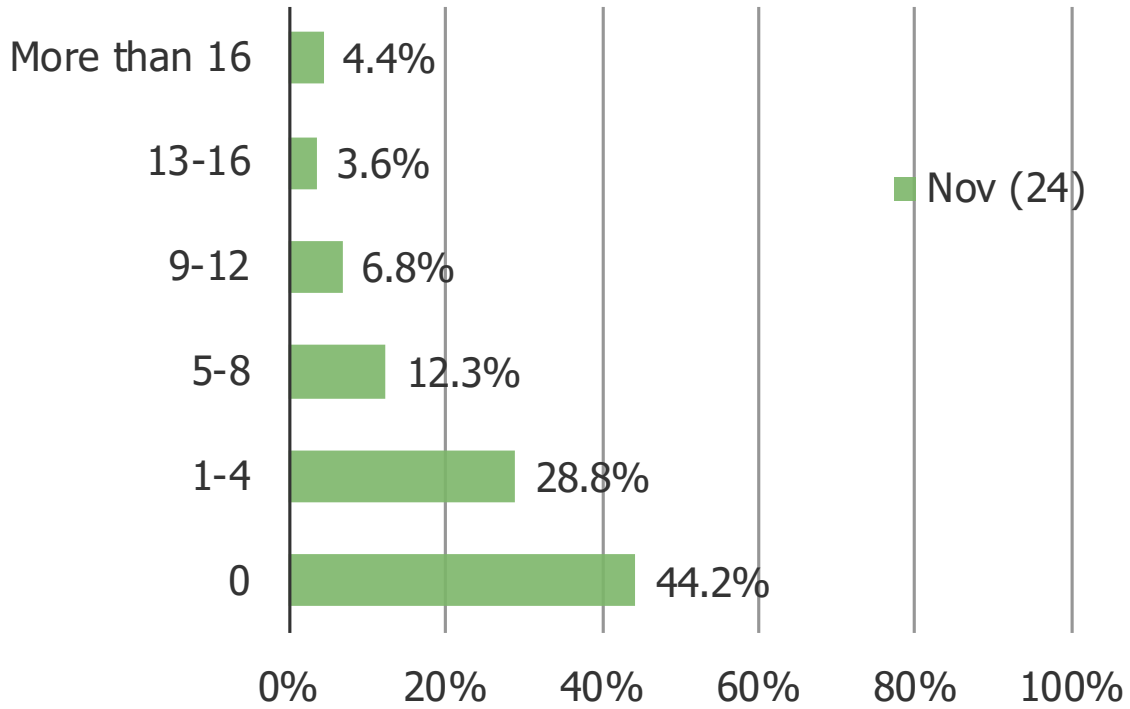
ABOUT HOW MANY ALCOHOLIC DRINKS DO YOU HAVE EACH WEEK?

Posed to all respondents



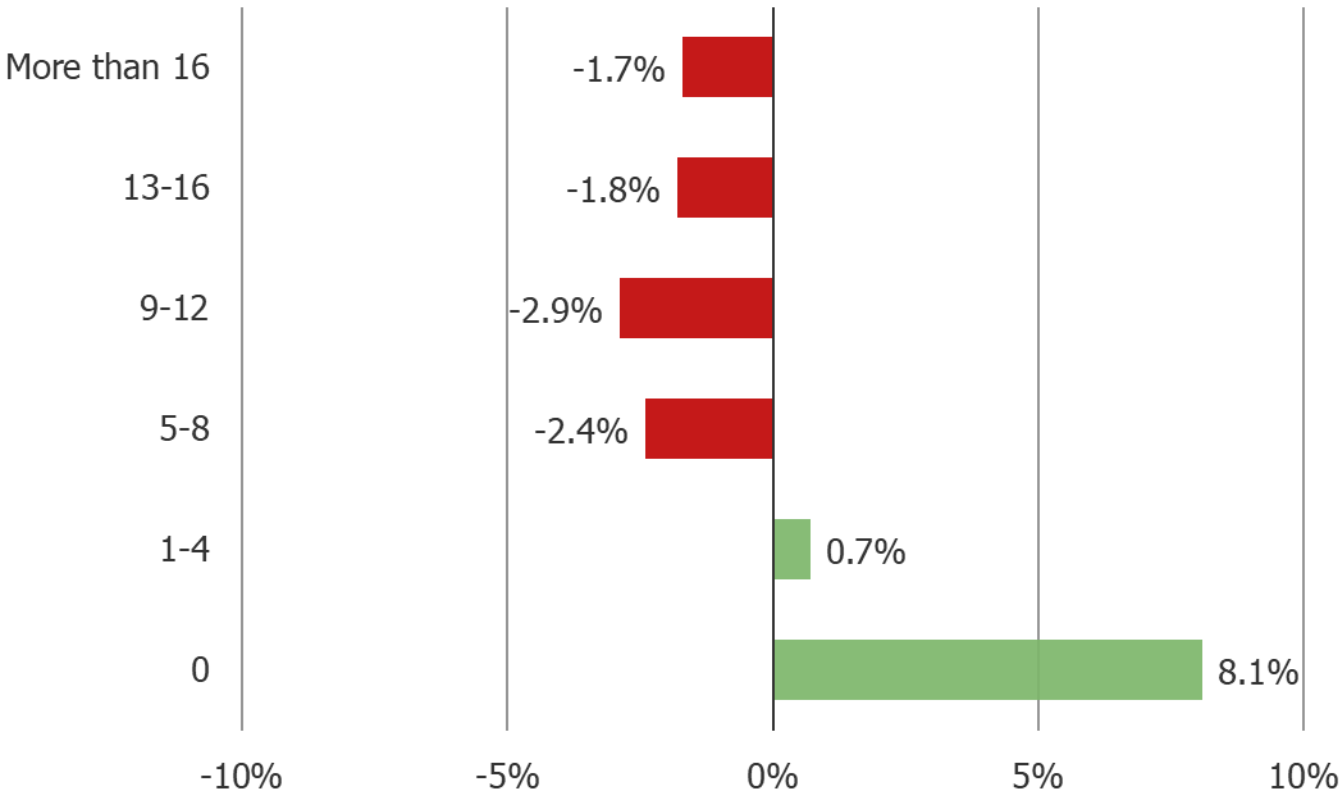
IF YOU WERE ASKED ONE YEAR AGO HOW MANY ALCOHOLIC DRINKS YOU DRINK EACH WEEK, WHAT WOULD YOU HAVE SAID?

Posed to all respondents



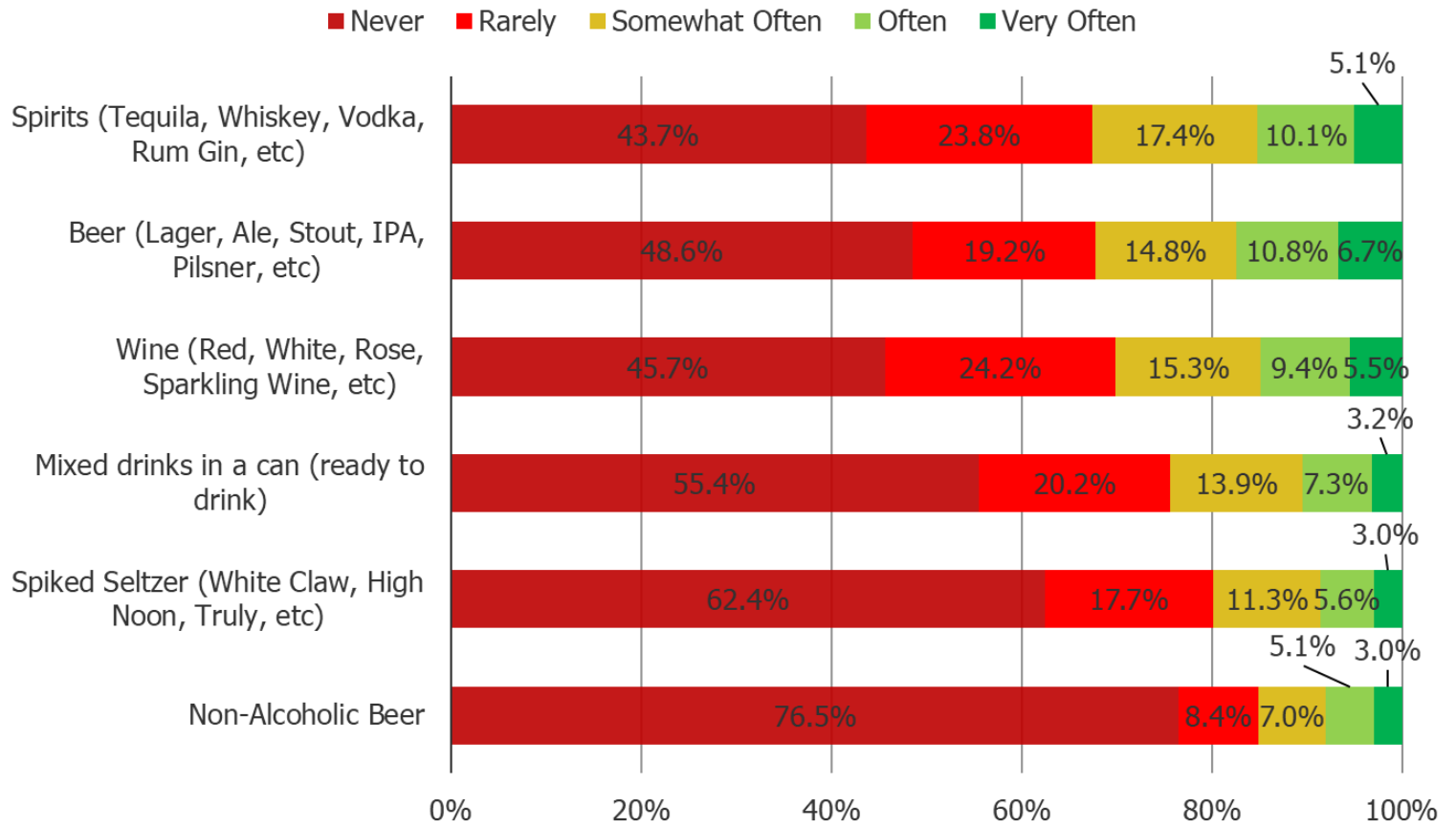
NOW (MINUS) IF WE ASKED ONE YEAR AGO...

Posed to all respondents



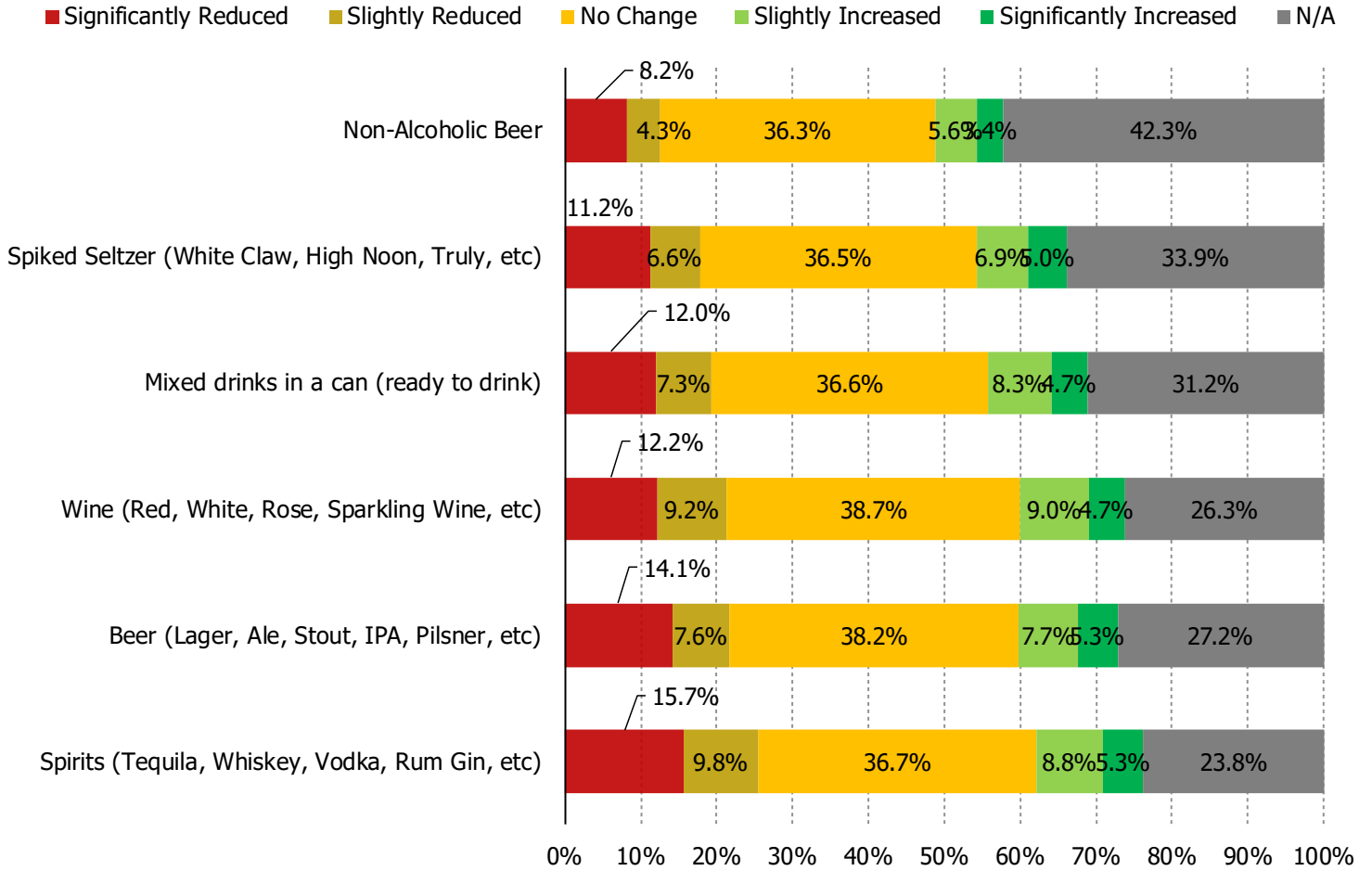
HOW OFTEN DO YOU DRINK THE FOLLOWING?

Posed to all respondents



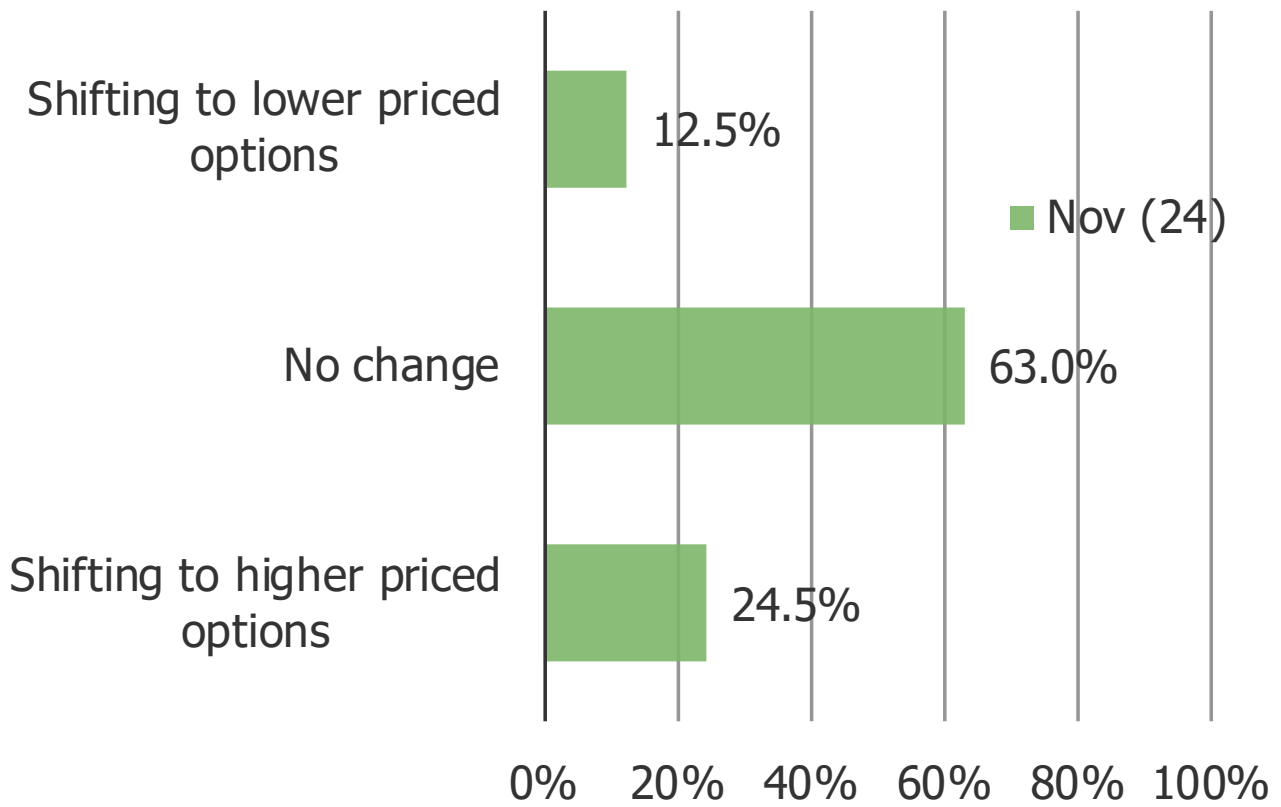
HOW HAS YOUR SHARE OF CONSUMPTION ACROSS THE FOLLOWING TYPES OF ALCOHOL CHANGED COMPARED TO RECENT YEARS? PLEASE INDICATE IF EACH CATEGORY MAKES UP A LARGER, SMALLER, OR SIMILAR PORTION OF YOUR OVERALL ALCOHOL CONSUMPTION NOW

Posed to all respondents



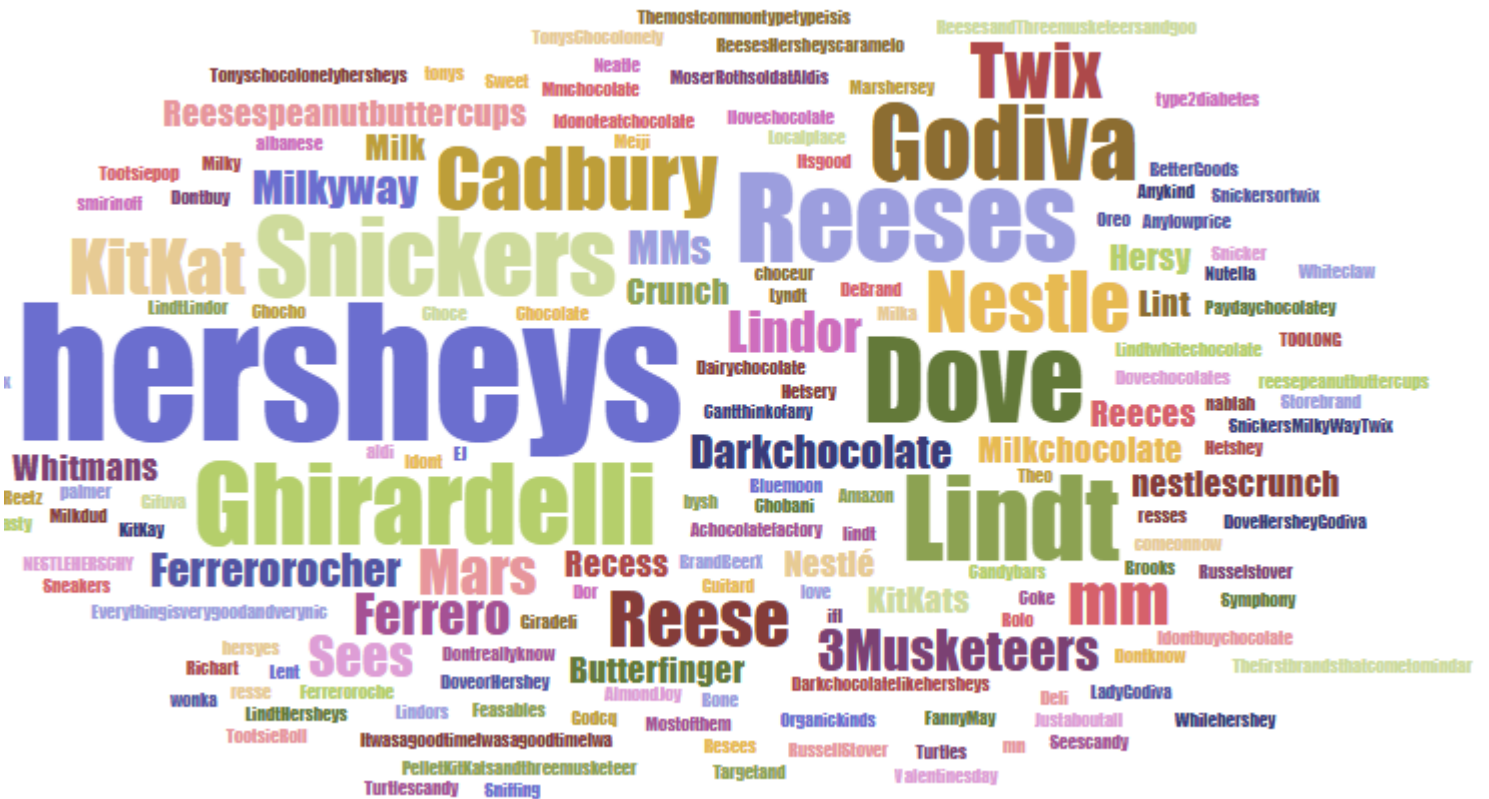
THINKING ABOUT THE PAST YEAR OR TWO, WOULD YOU SAY THE ALCOHOLIC BEVERAGE PRODUCTS YOU PURCHASE ARE...

Posed to all respondents



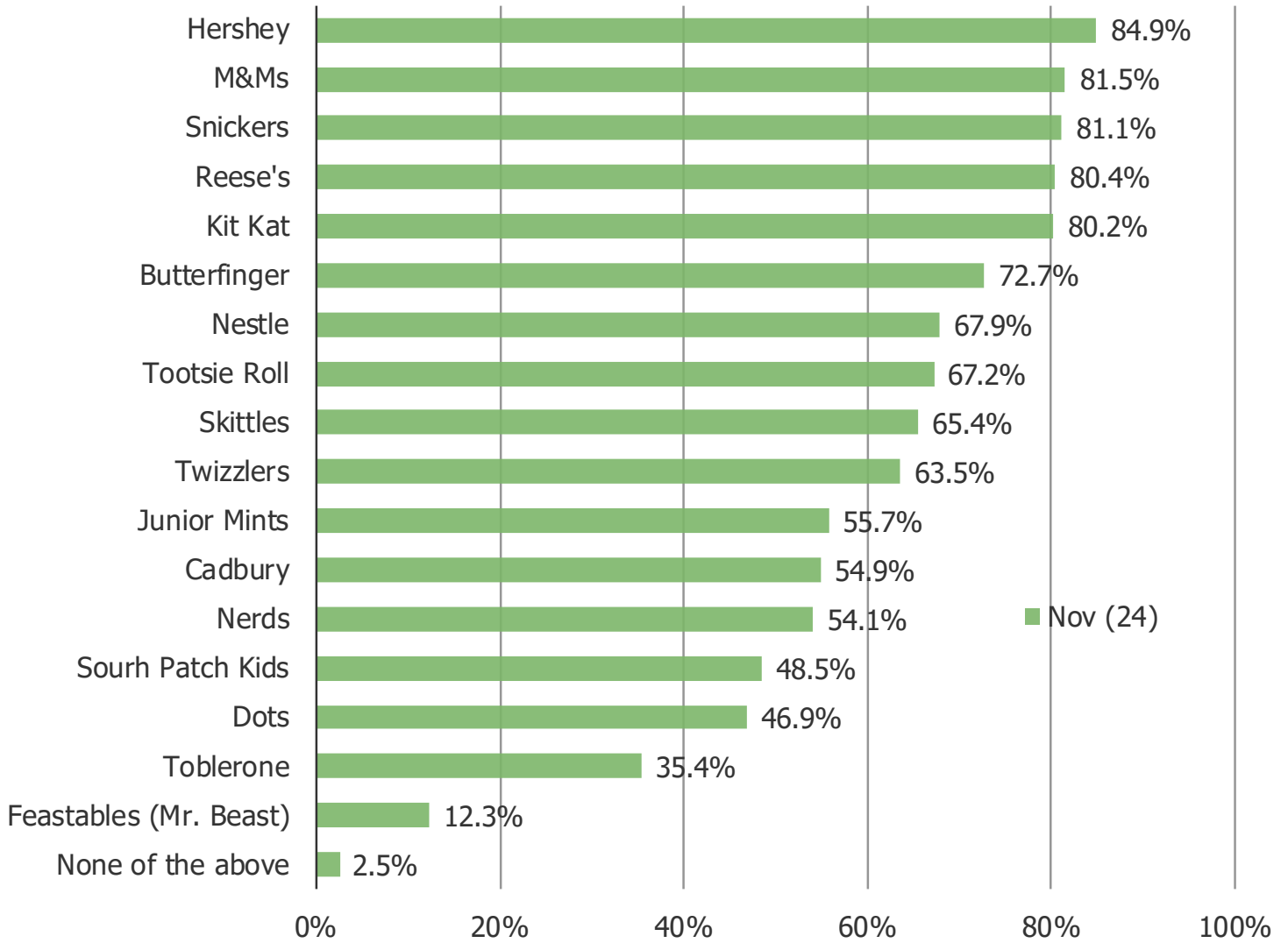
WHEN YOU THINK OF BUYING CHOCOLATE, WHAT BRAND COMES TO MIND FIRST?

Posed to all respondents



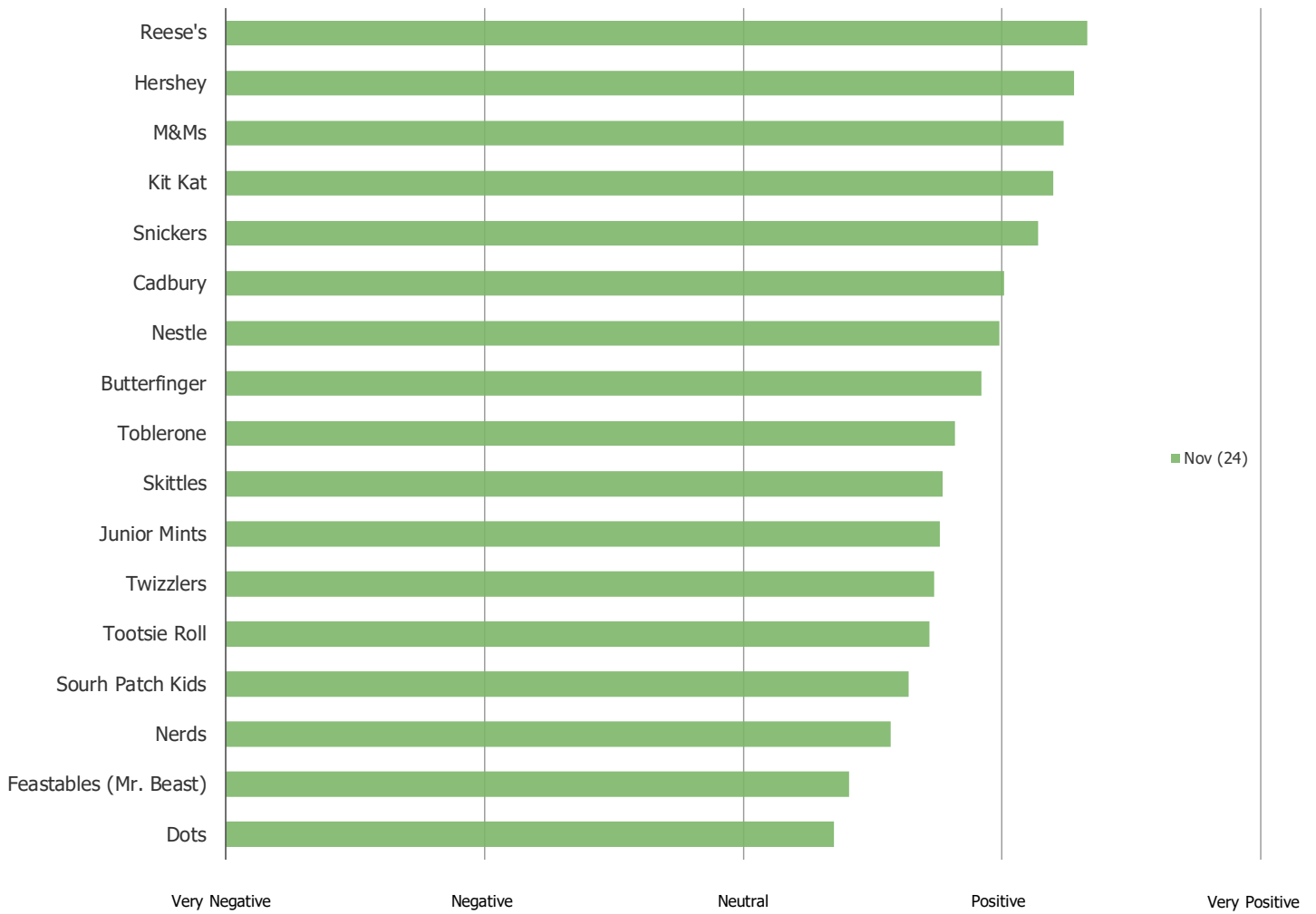
WHICH OF THE FOLLOWING BRANDS ARE YOU FAMILIAR WITH? SELECT ALL THAT APPLY

Posed to all respondents



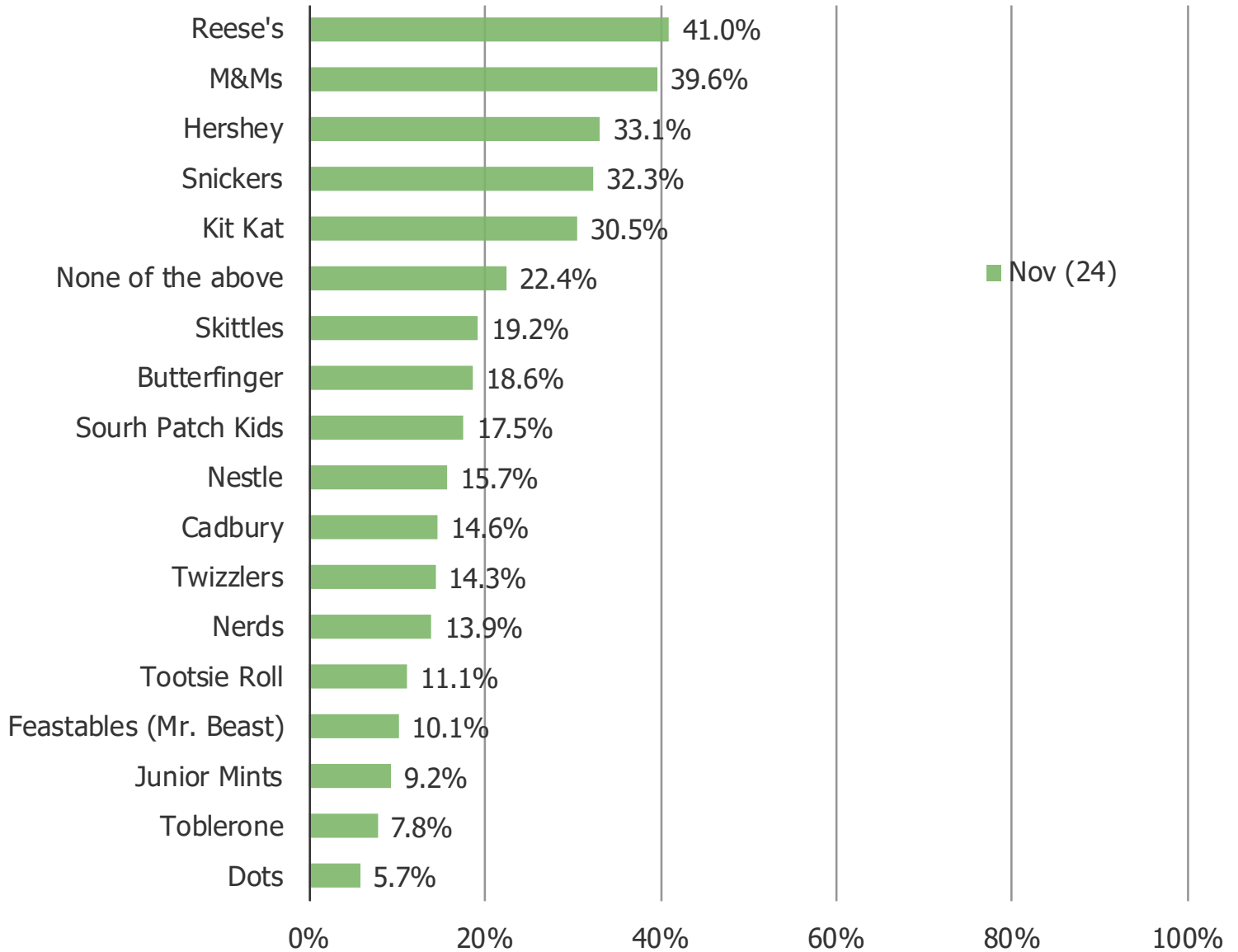
WHAT IS YOUR OPINION OF THE FOLLOWING BRANDS?

Posed to all respondents who are familiar with the below.



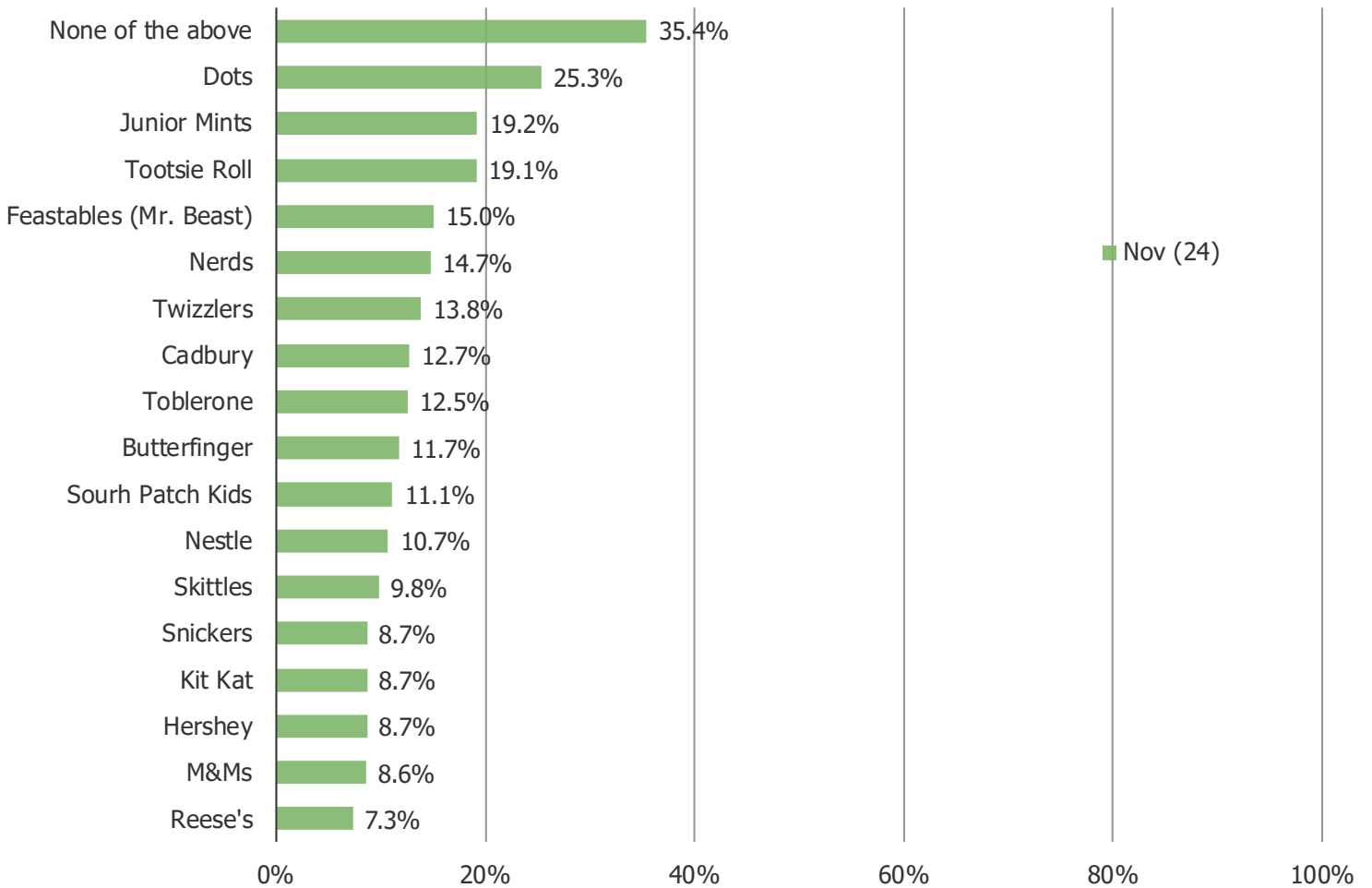
IN YOUR OPINION, WHICH OF THE FOLLOWING BRANDS ARE GAINING POPULARITY? SELECT ALL THAT APPLY

Posed to all respondents



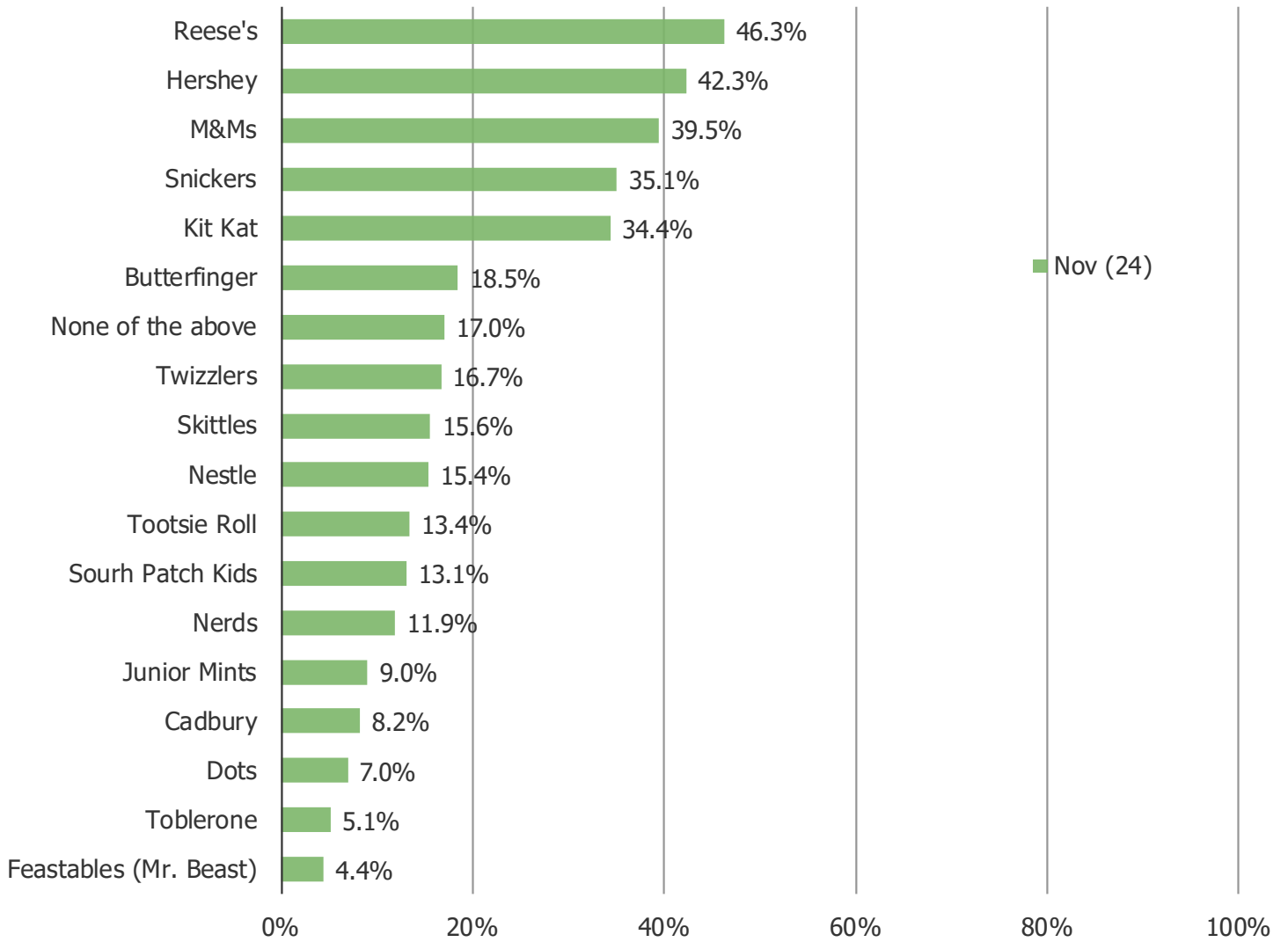
IN YOUR OPINION, WHICH OF THE FOLLOWING BRANDS ARE LOSING POPULARITY? SELECT ALL THAT APPLY

Posed to all respondents



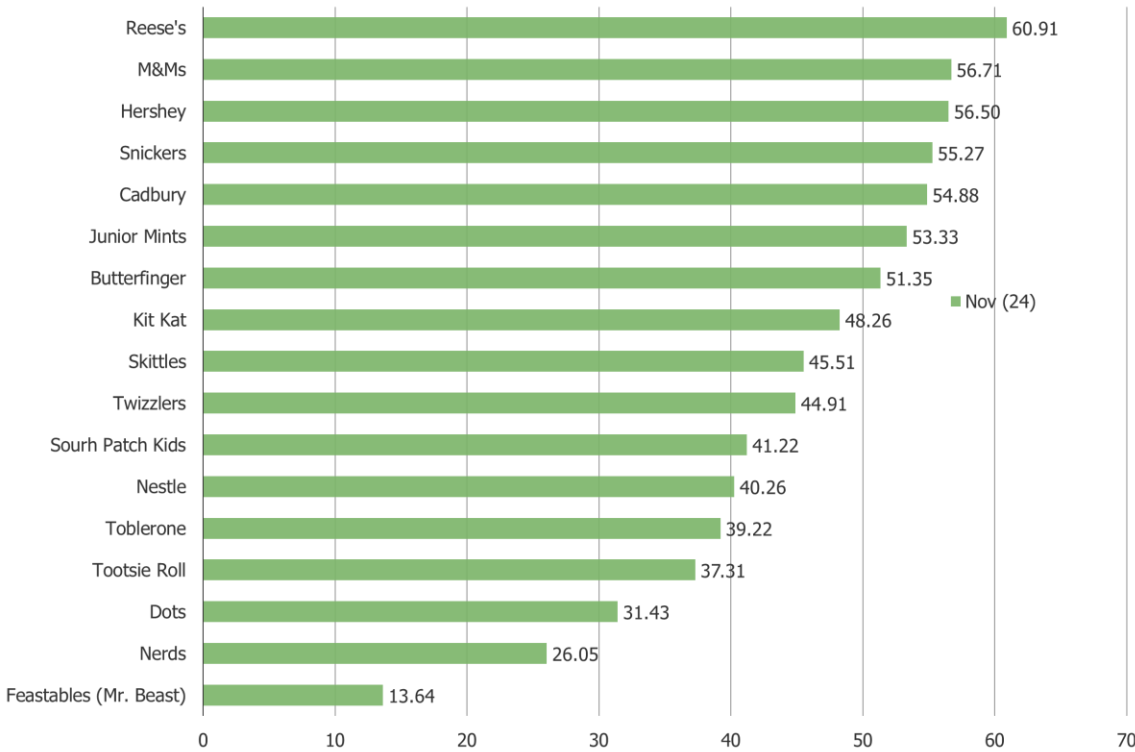
HAVE YOU PURCHASED PRODUCTS FROM ANY OF THE FOLLOWING BRANDS IN THE PAST MONTH OR TWO? SELECT ALL THAT APPLY

Posed to all respondents



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

Posed to all respondents who have purchased the below in the past month or two.

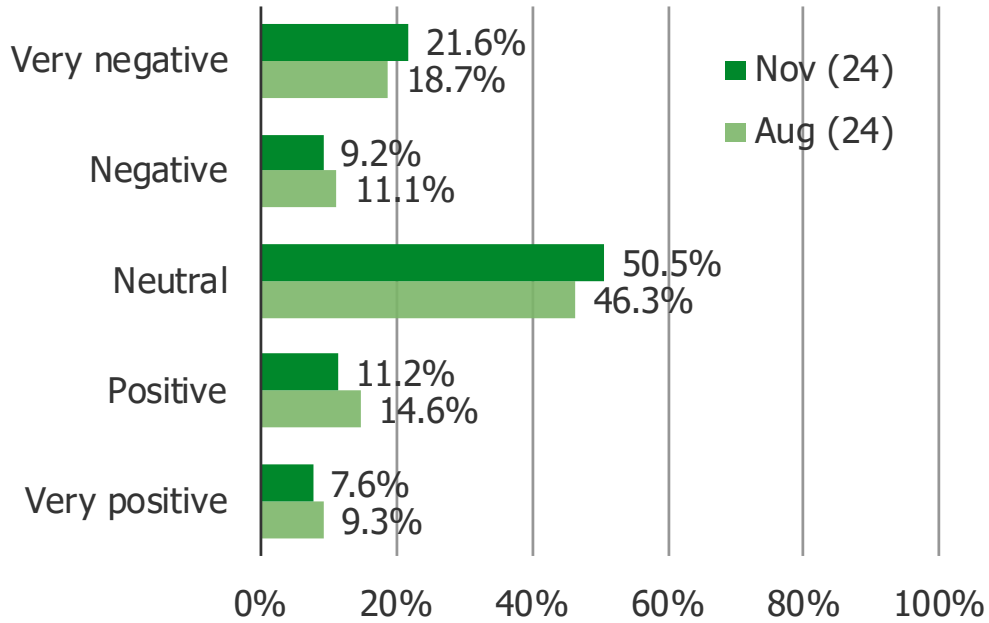


	N=
Feastables (Mr. Beast)	44
Hershey	423
Reese's	463
Kit Kat	344
Twizzlers	167
Cadbury	82
Toblerone	51
Sourh Patch Kids	131
Nerds	119
Butterfinger	185
Nestle	154
Tootsie Roll	134
Junior Mints	90
Dots	70
M&Ms	395
Snickers	351
Skittles	156

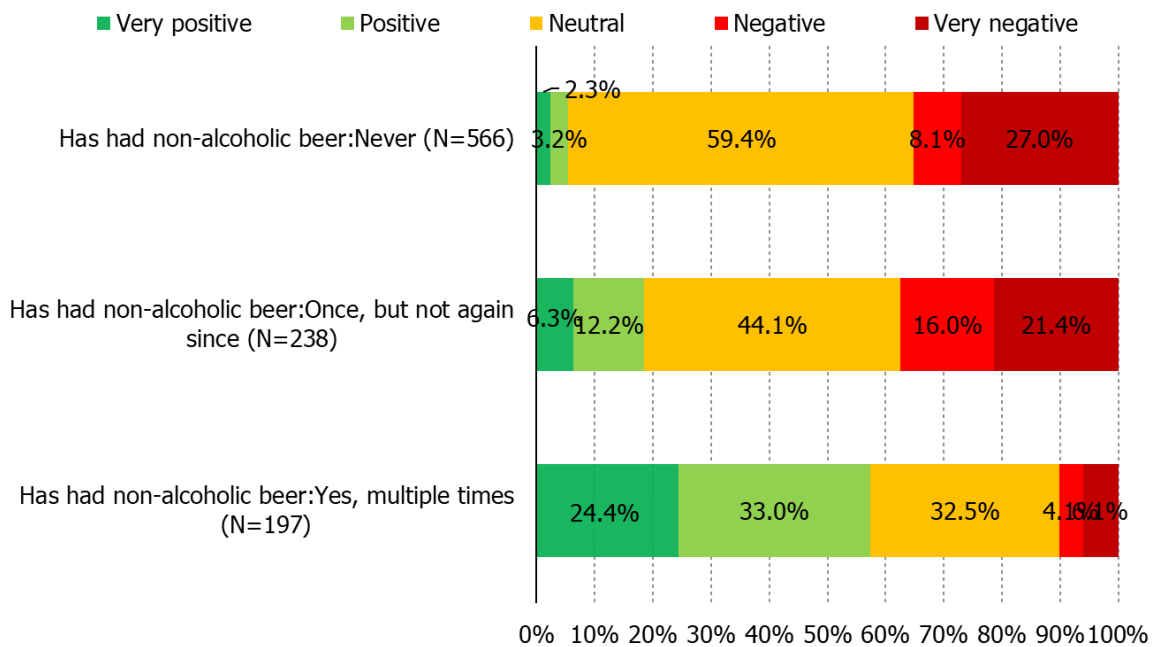
NON-ALCOHOLIC BEER

WHAT IS YOUR OPINION OF NON-ALCOHOLIC BEER?

Posed to all respondents

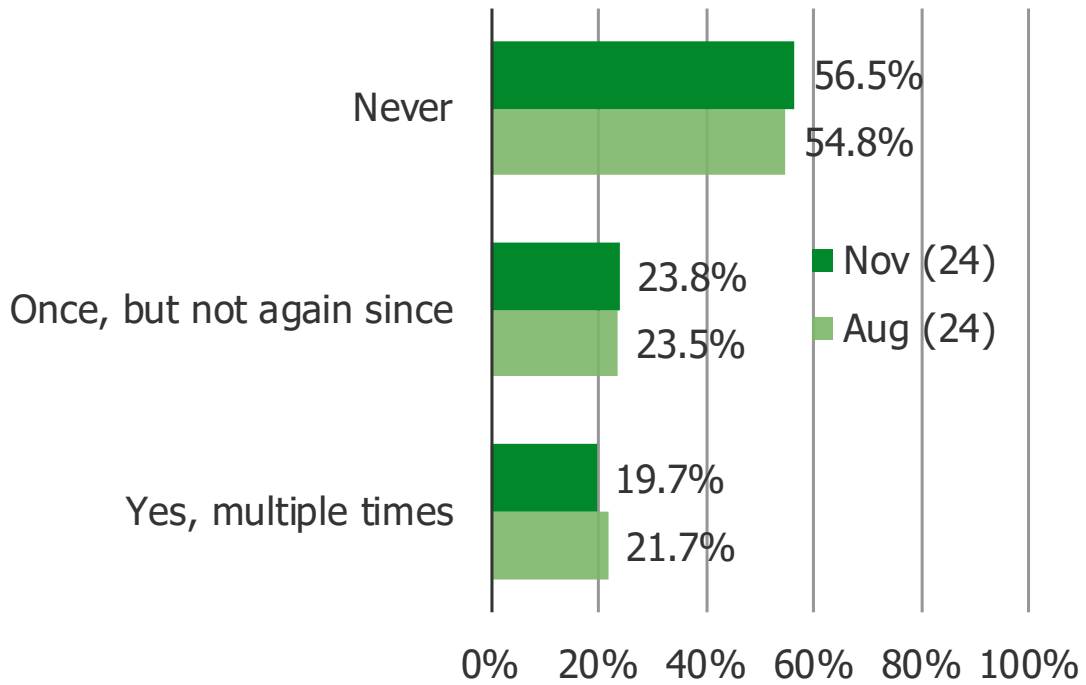


Cross-tabbed by their experience with non-alcoholic beer...



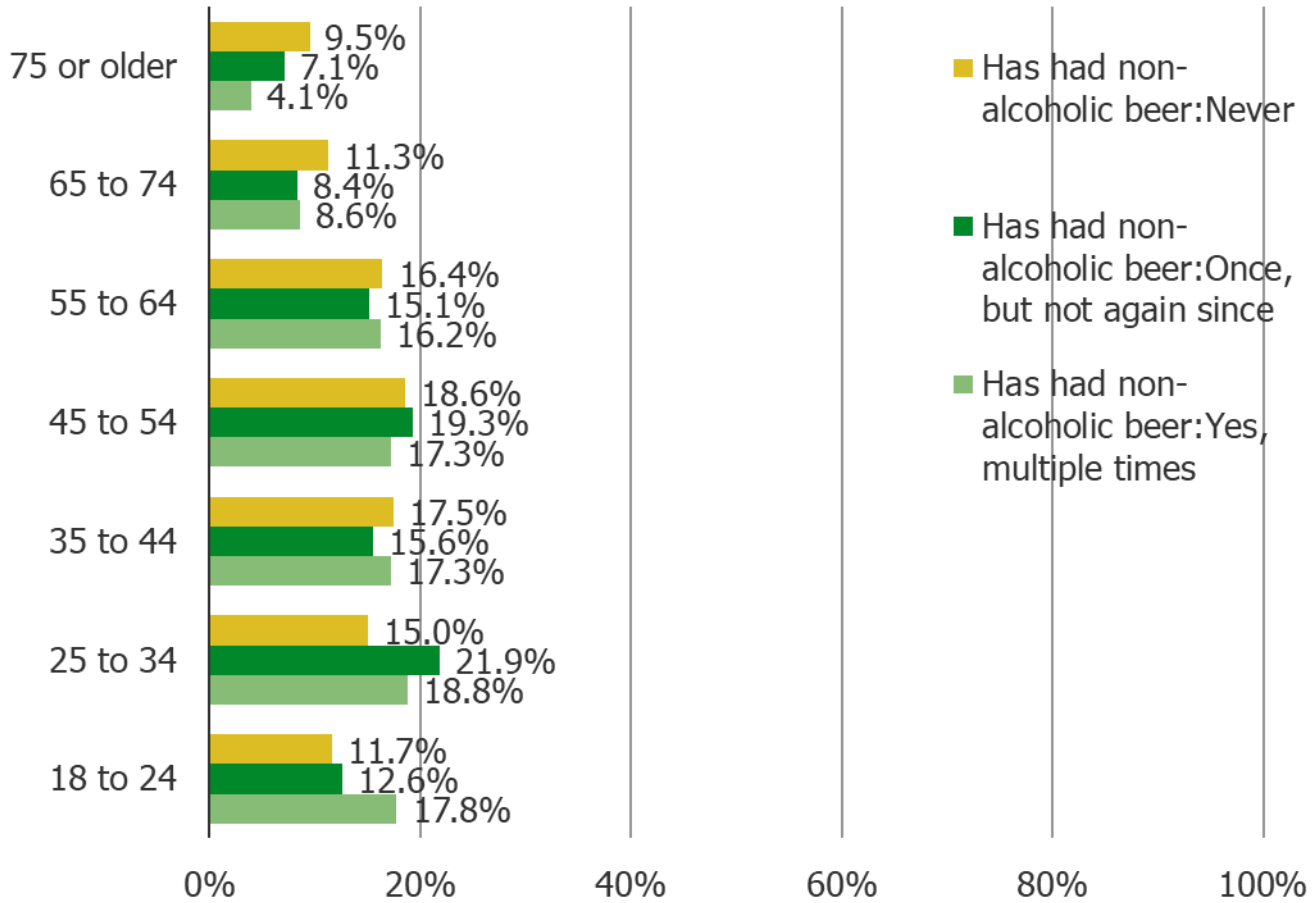
HAVE YOU EVER CONSUMED NON-ALCOHOLIC BEER?

Posed to all respondents



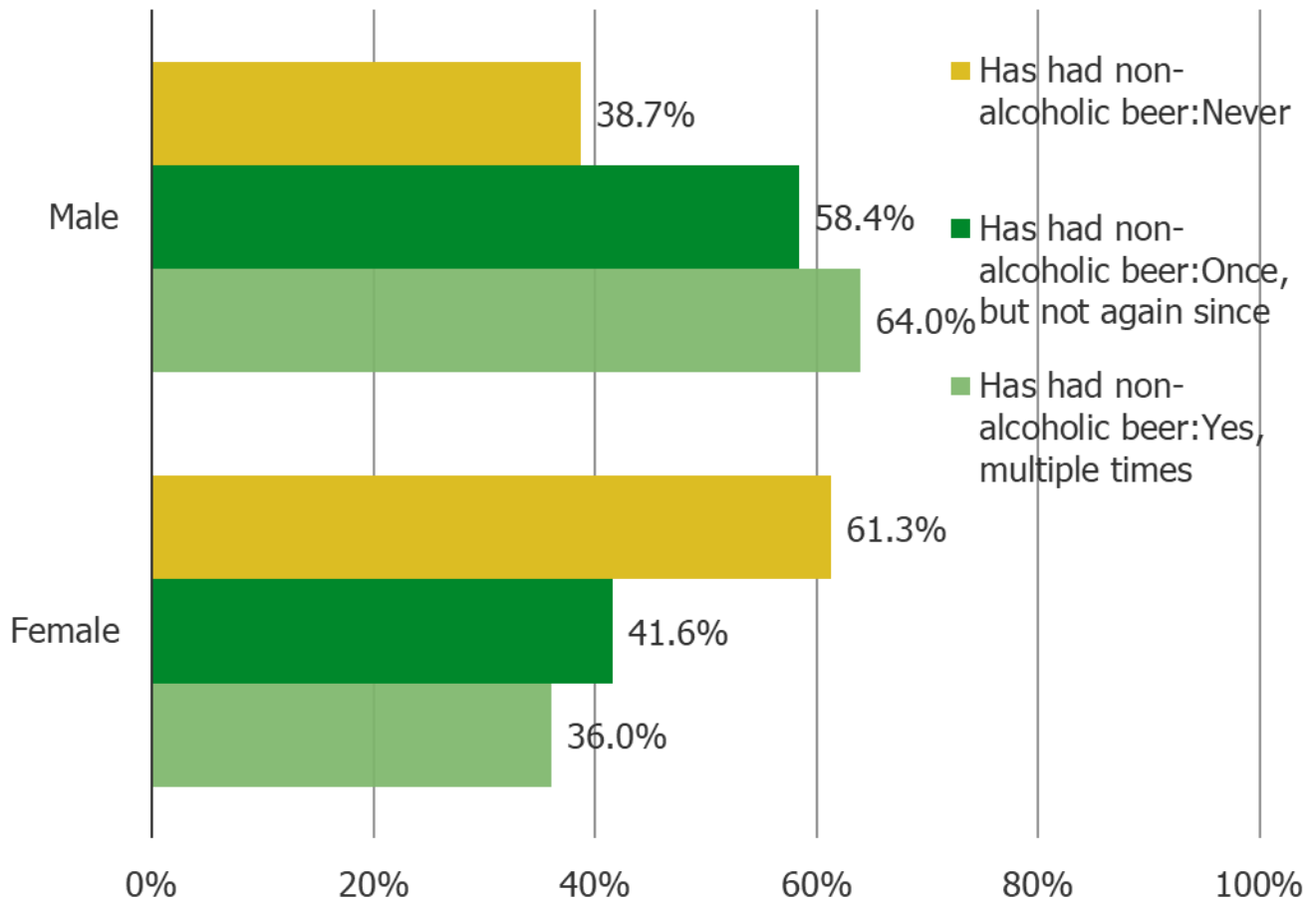
WHO IS THE CUSTOMER? EXPERIENCE WITH NON-ALCOHOLIC BEER

Age:



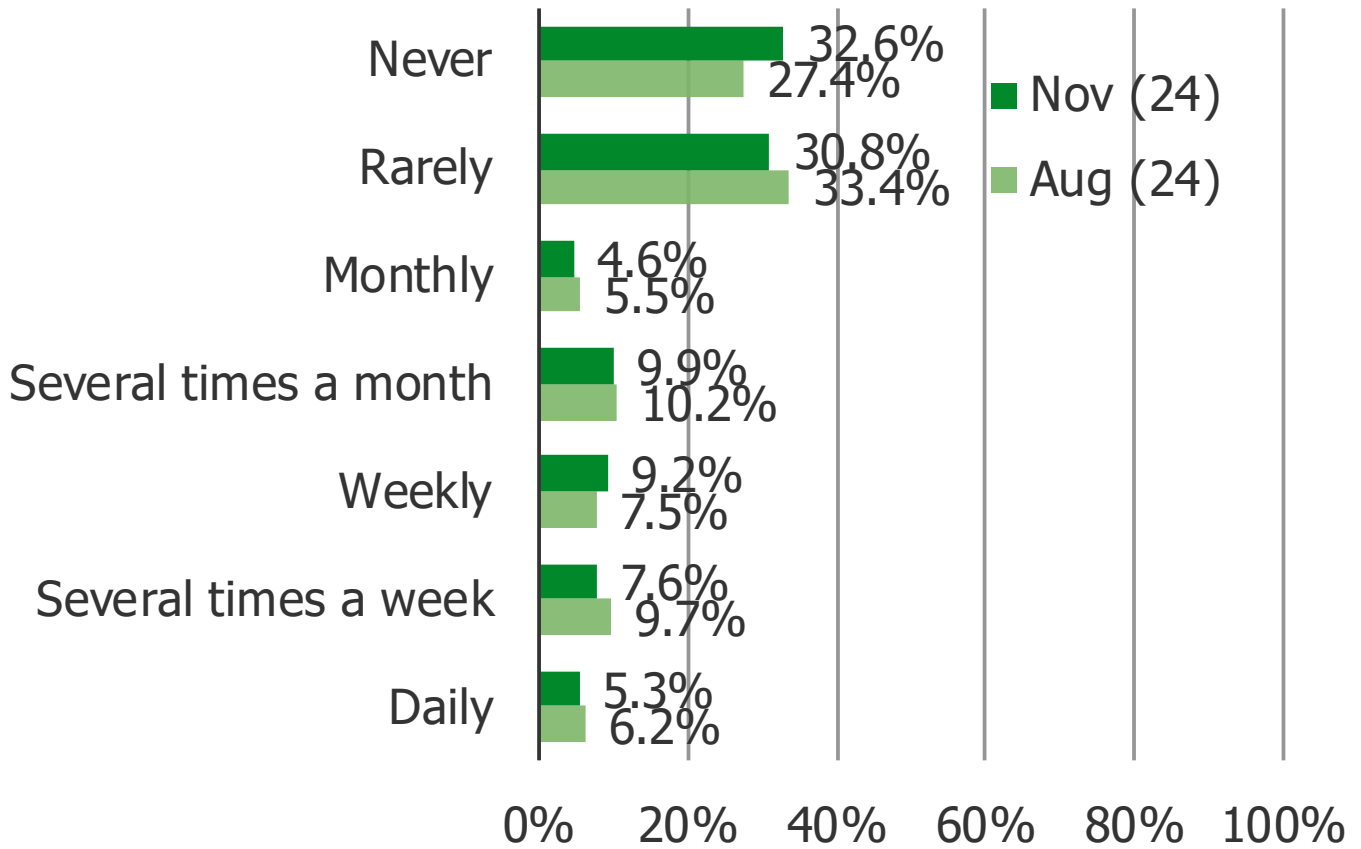
WHO IS THE CUSTOMER? EXPERIENCE WITH NON-ALCOHOLIC BEER

Gender:



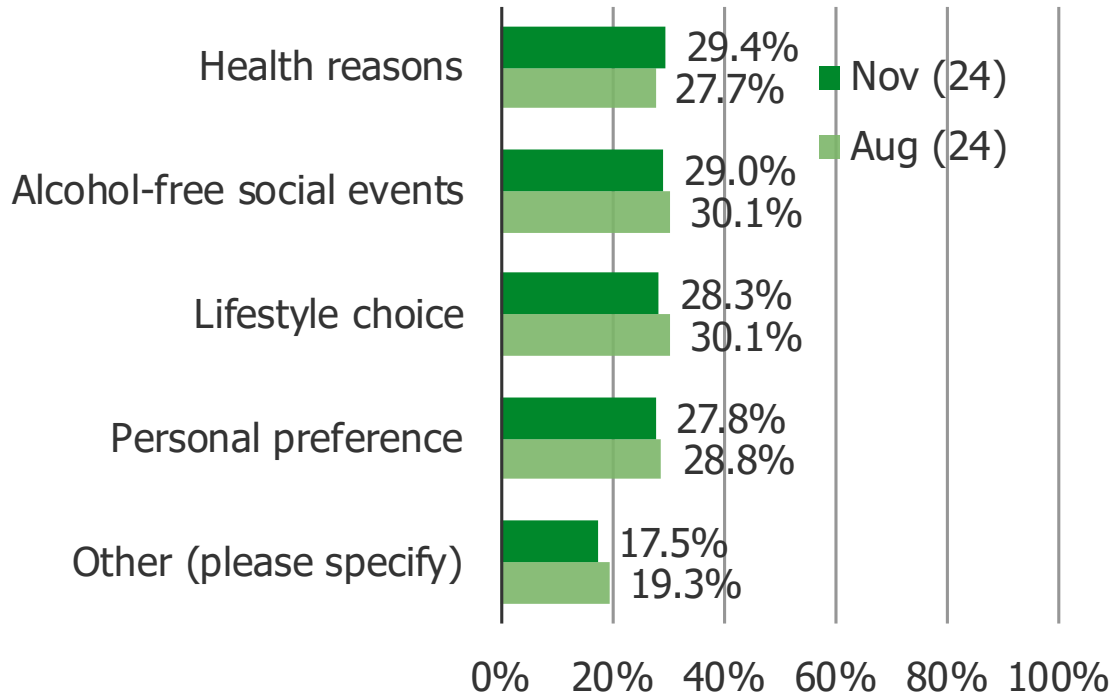
HOW OFTEN DO YOU CONSUME NON-ALCOHOLIC BEER?

Posed to all respondents who consume non-alcoholic beer.



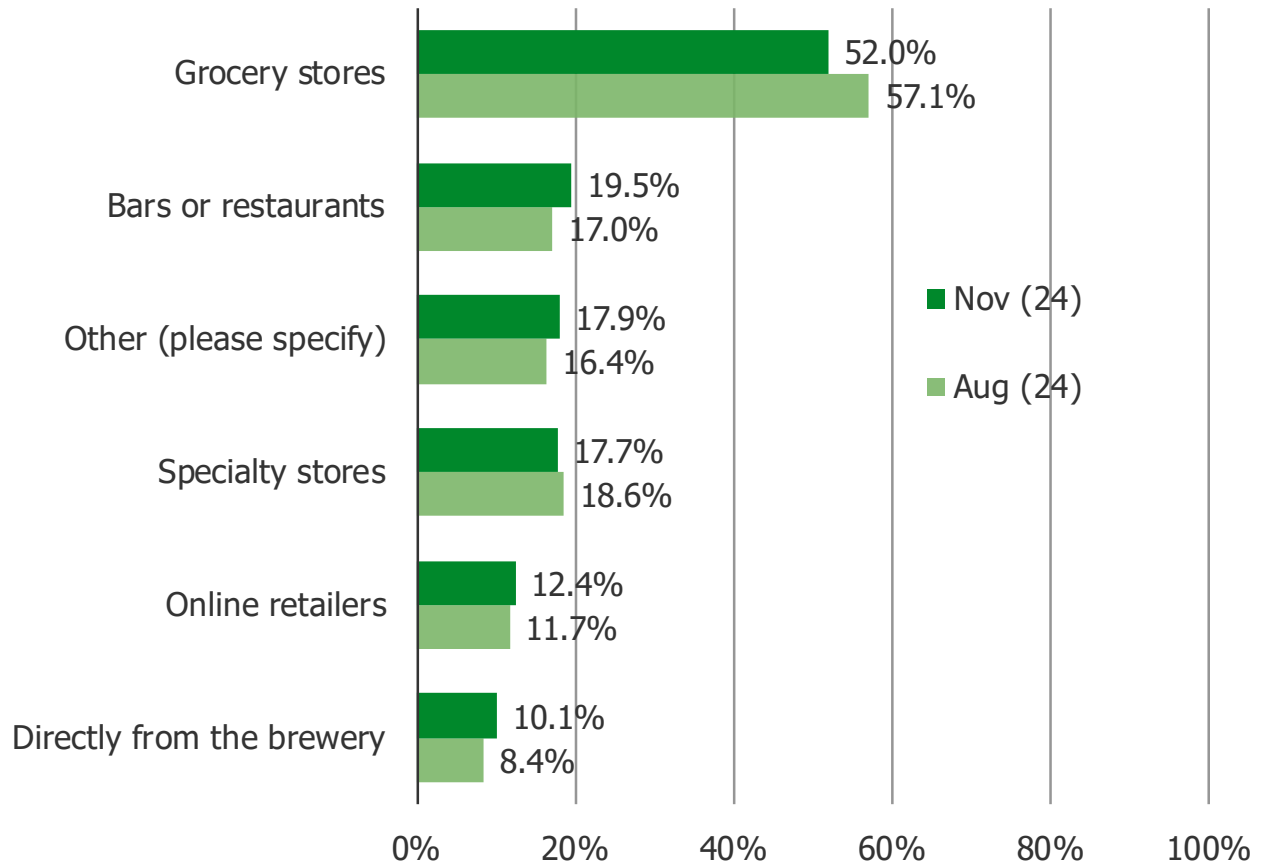
WHAT ARE YOUR PRIMARY REASONS FOR CHOOSING NON-ALCOHOLIC BEER? (SELECT ALL THAT APPLY)

Posed to all respondents who consume non-alcoholic beer.



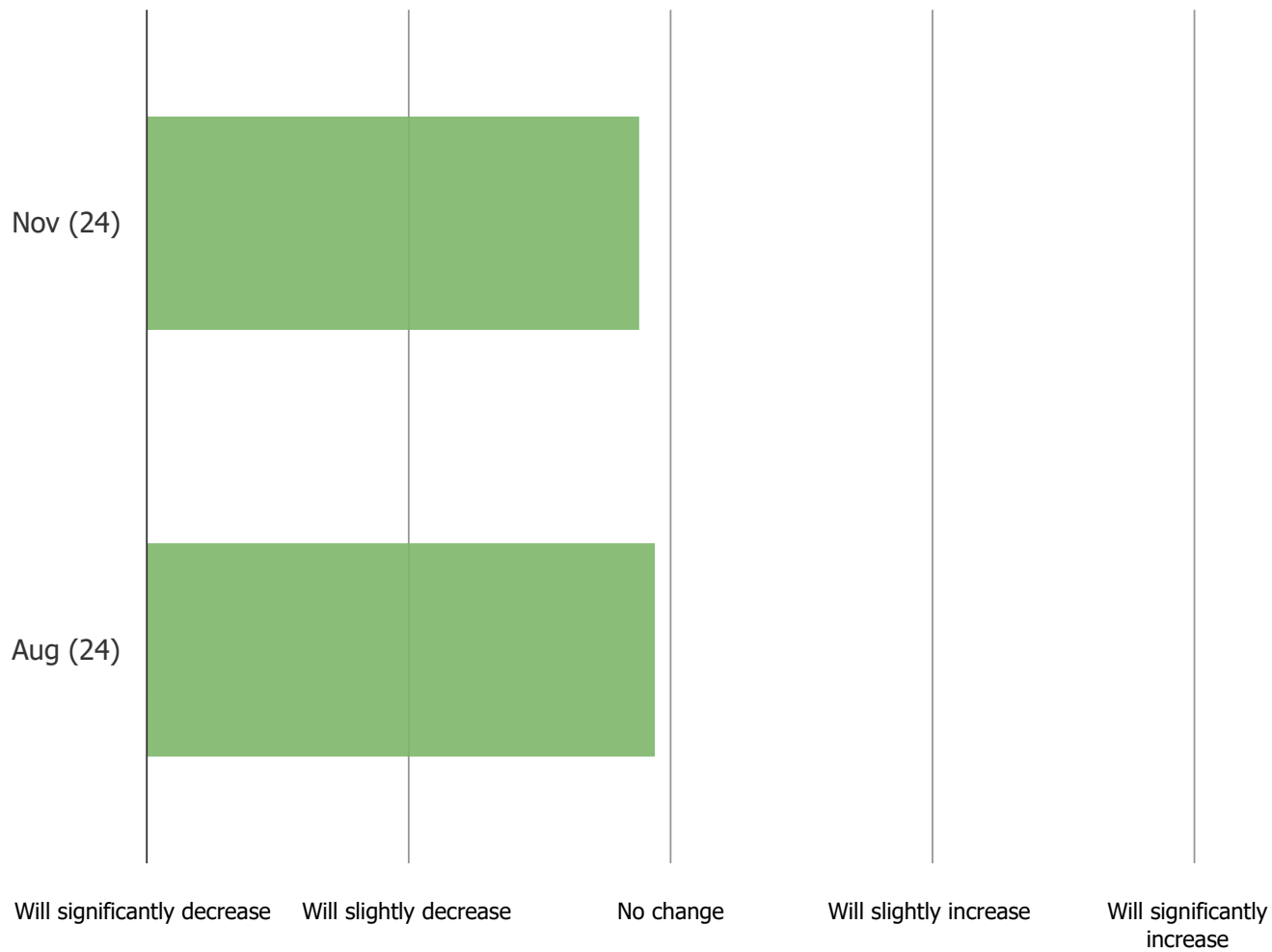
WHERE DO YOU TYPICALLY PURCHASE NON-ALCOHOLIC BEER? (SELECT ALL THAT APPLY)

Posed to all respondents who consume non-alcoholic beer.



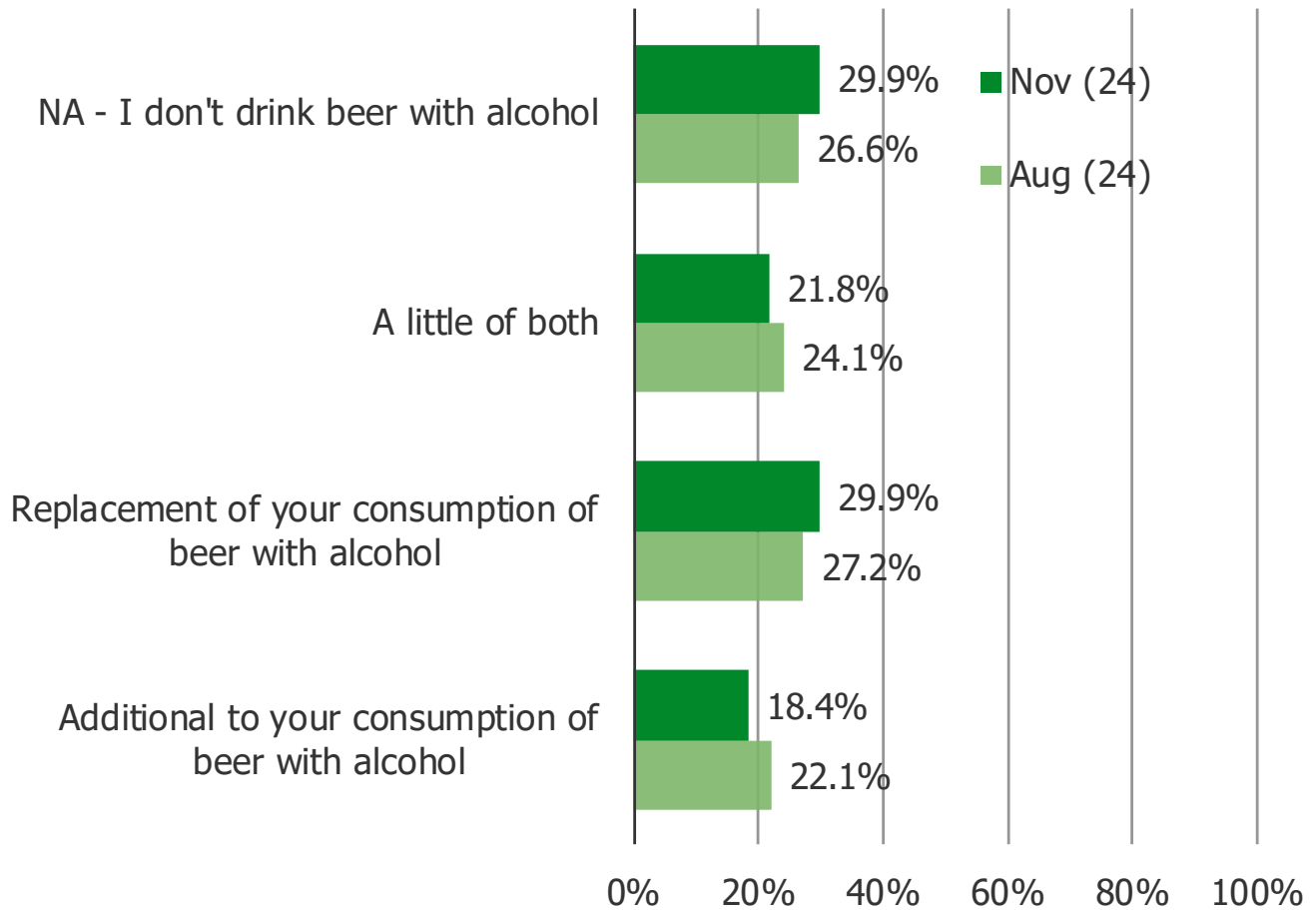
DO YOU EXPECT TO CHANGE HOW OFTEN YOU DRINK NON-ALCOHOLIC BEER IN THE FUTURE?

Posed to all respondents who consume non-alcoholic beer.



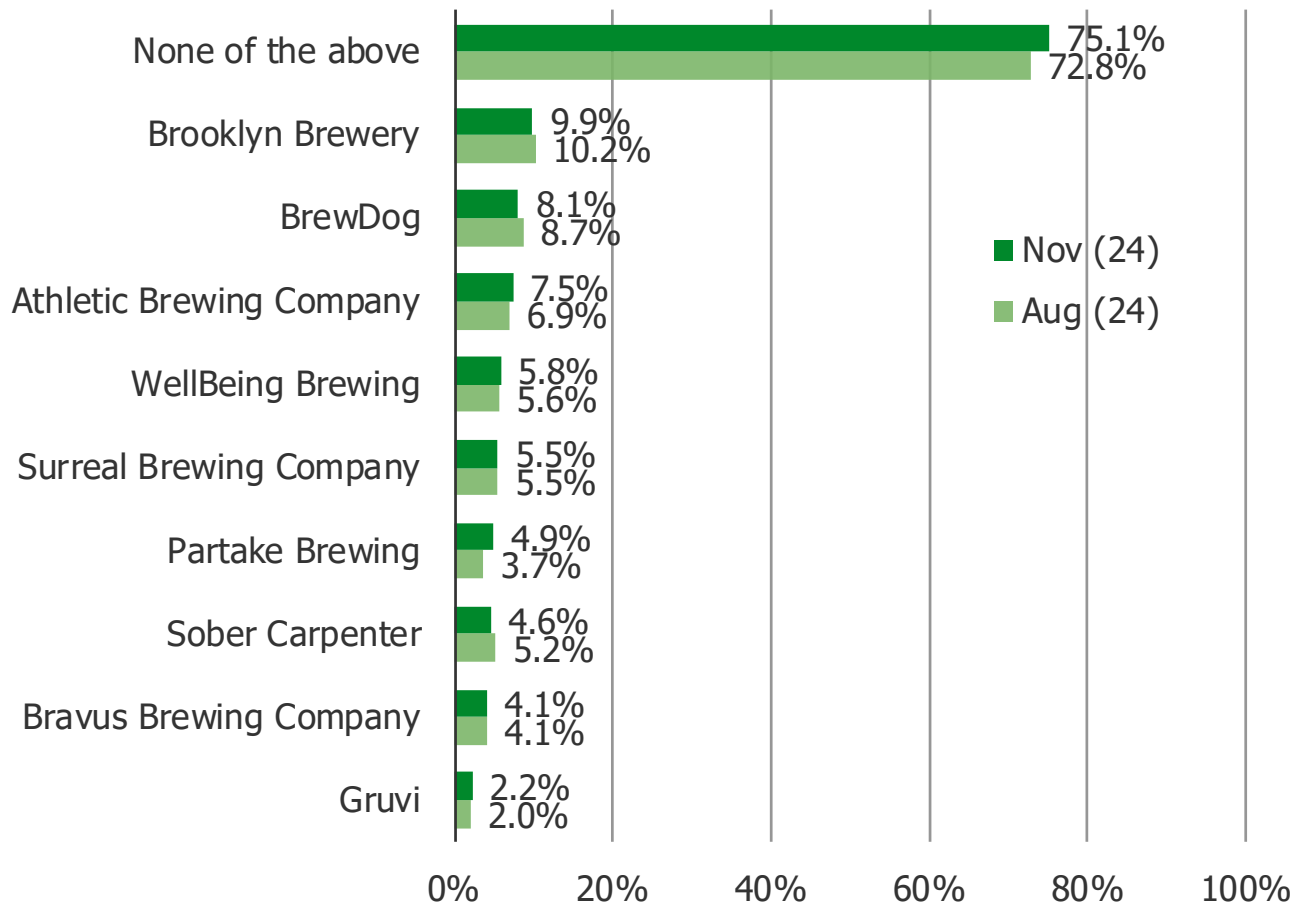
IS YOUR CONSUMPTION OF NON-ALCOHOLIC BEER...

Posed to all respondents who consume non-alcoholic beer.



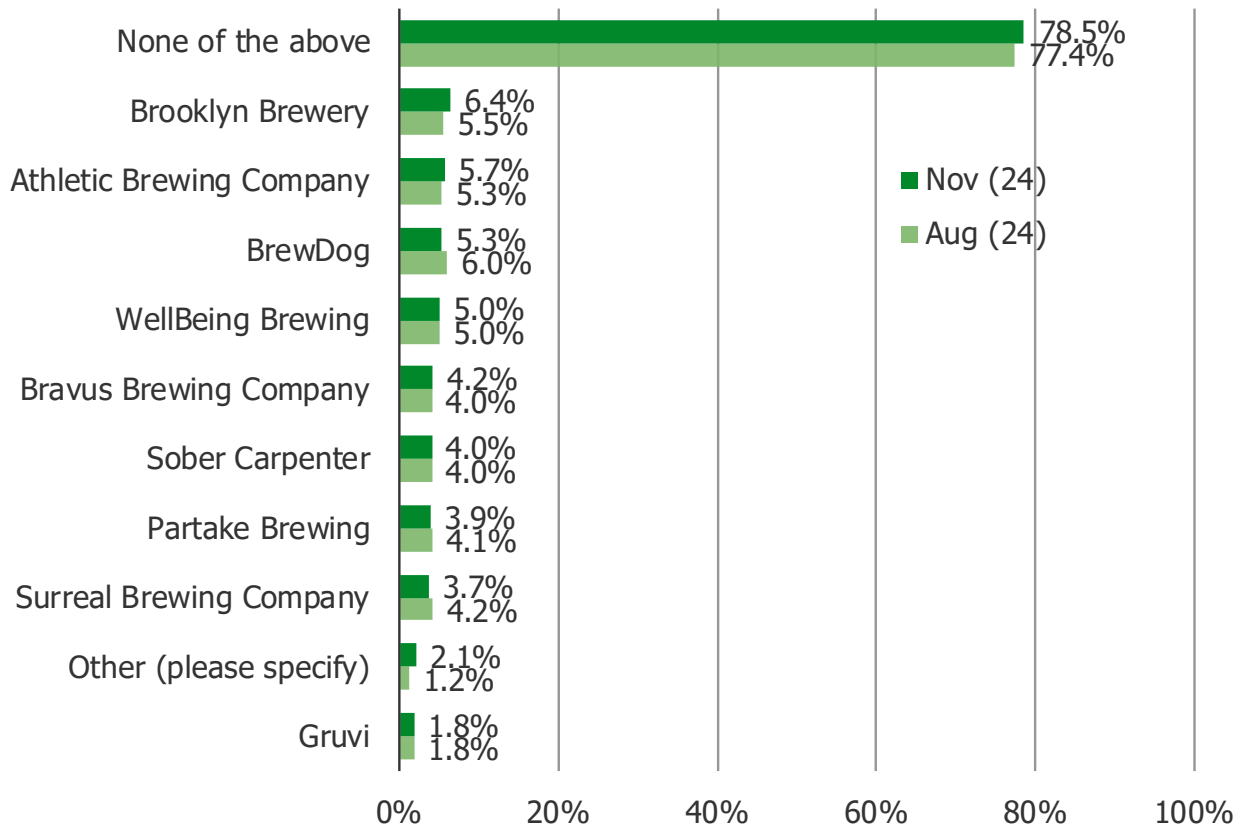
HAVE YOU HEARD OF ANY OF THE FOLLOWING NON-ALCOHOLIC BEER BRANDS? SELECT ALL THAT APPLY

Posed to all respondents



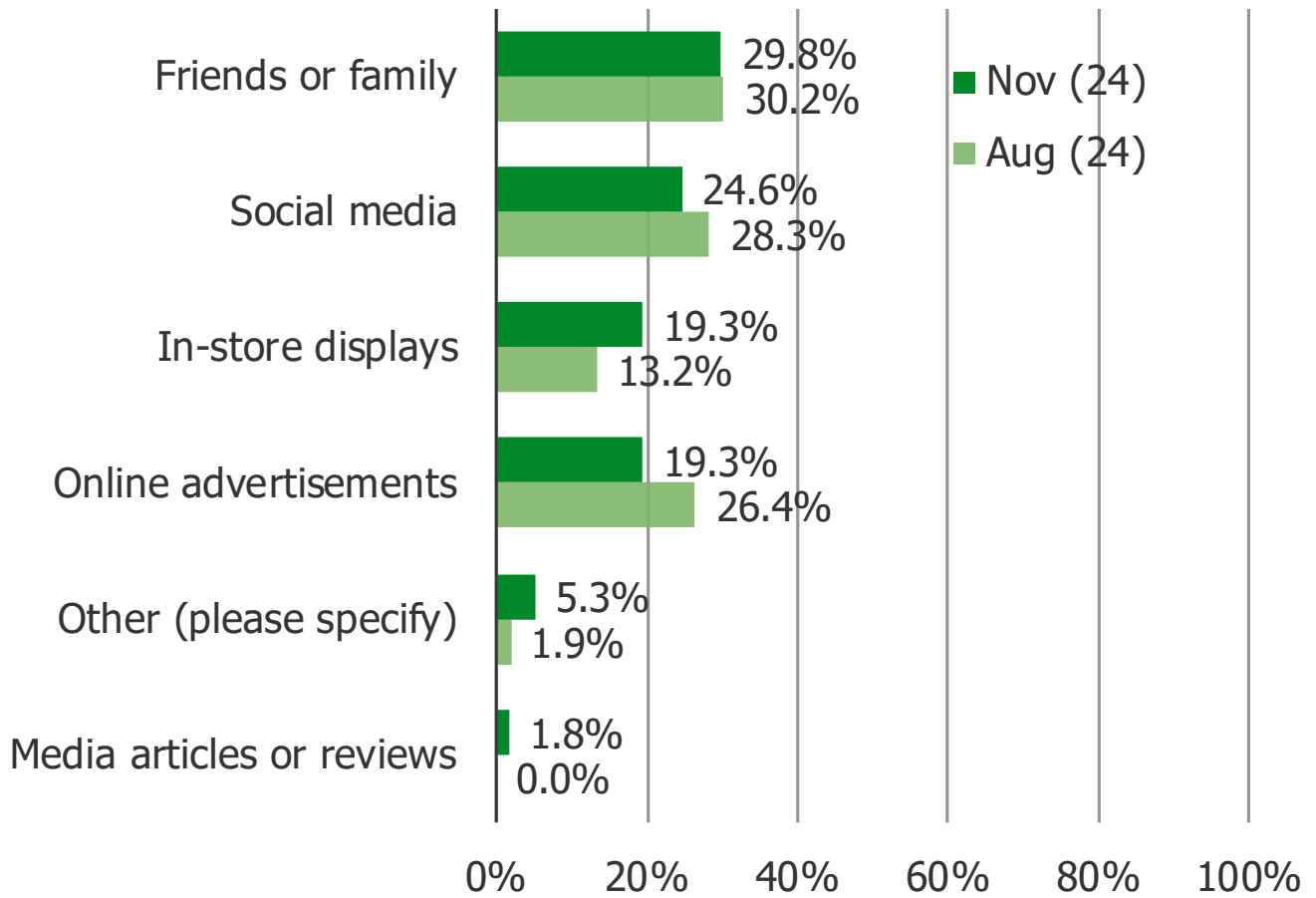
HAVE YOU EVER TRIED ANY OF THE FOLLOWING NON-ALCOHOLIC BEER BRANDS? SELECT ALL THAT APPLY

Posed to all respondents



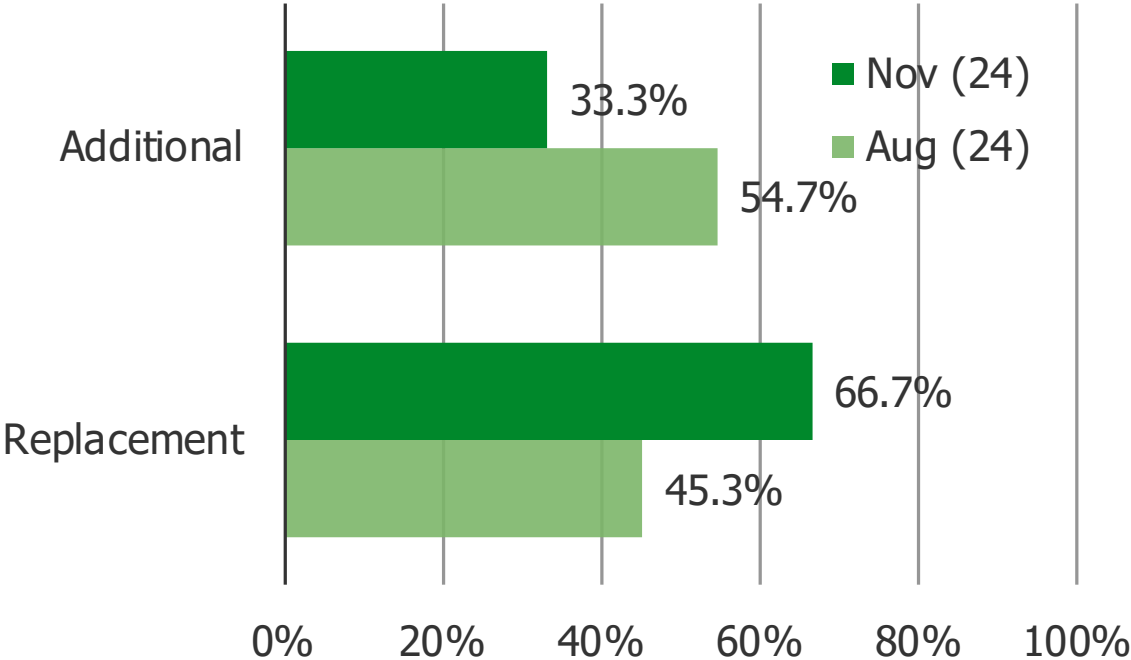
HOW DID YOU FIRST LEARN ABOUT ATHLETIC BREWING COMPANY?

Posed to all respondents who have tried Athletic Brewing (N = 57).



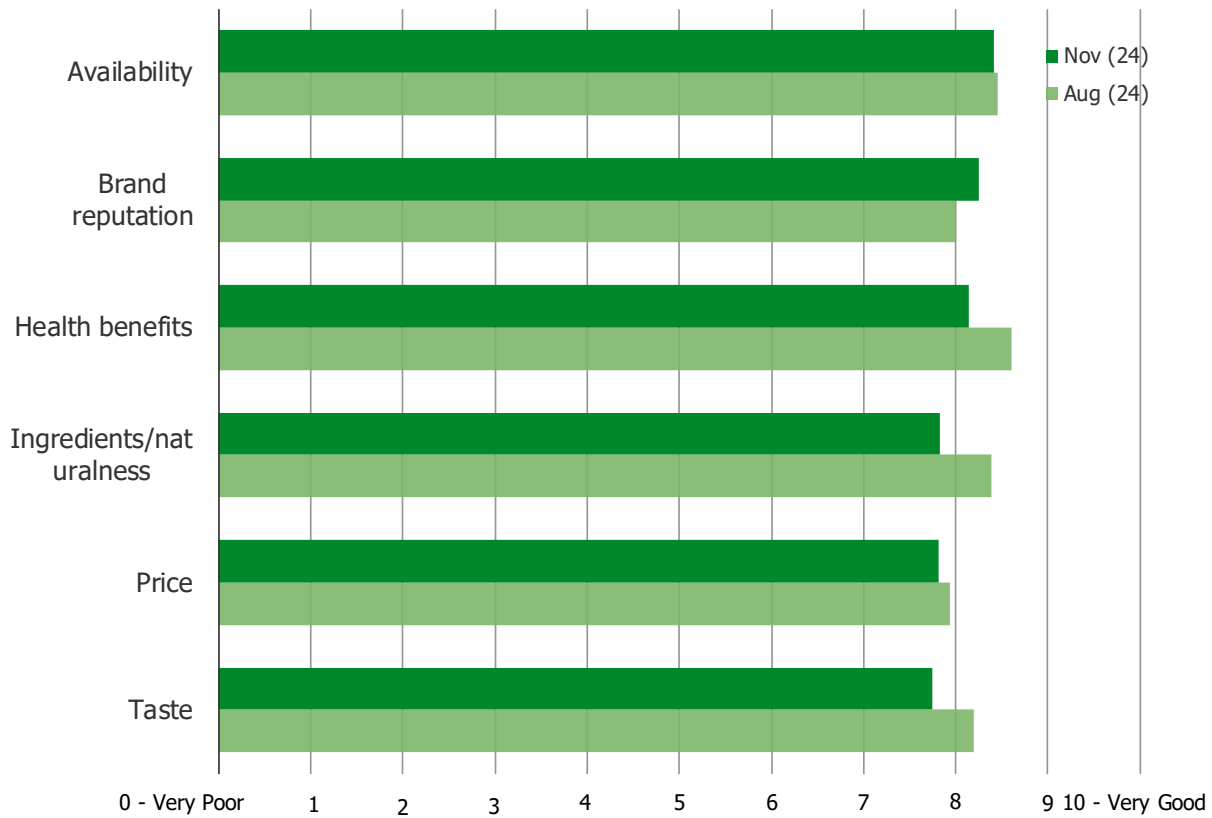
DO YOU VIEW YOUR CONSUMPTION OF ATHLETIC BREWING TO BE ADDITIONAL OR REPLACEMENT OF REGULAR BEER CONSUMPTION?

Posed to all respondents who have tried Athletic Brewing (N = 57).



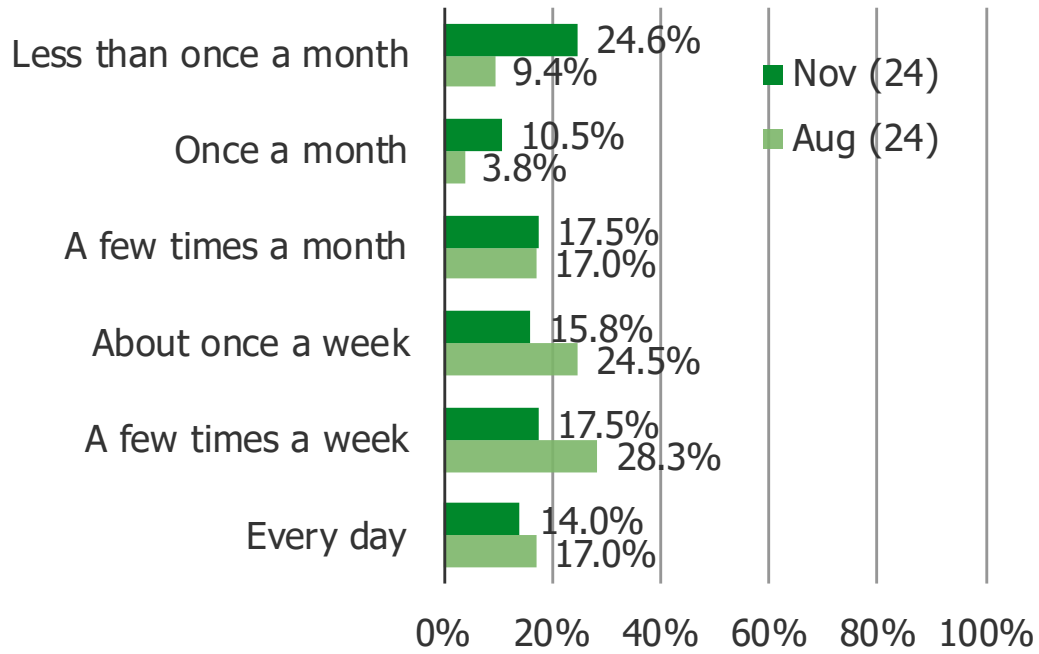
HOW WOULD YOU RATE ATHLETIC BREWING WHEN IT COMES TO...

Posed to all respondents who have tried Athletic Brewing (N = 57).



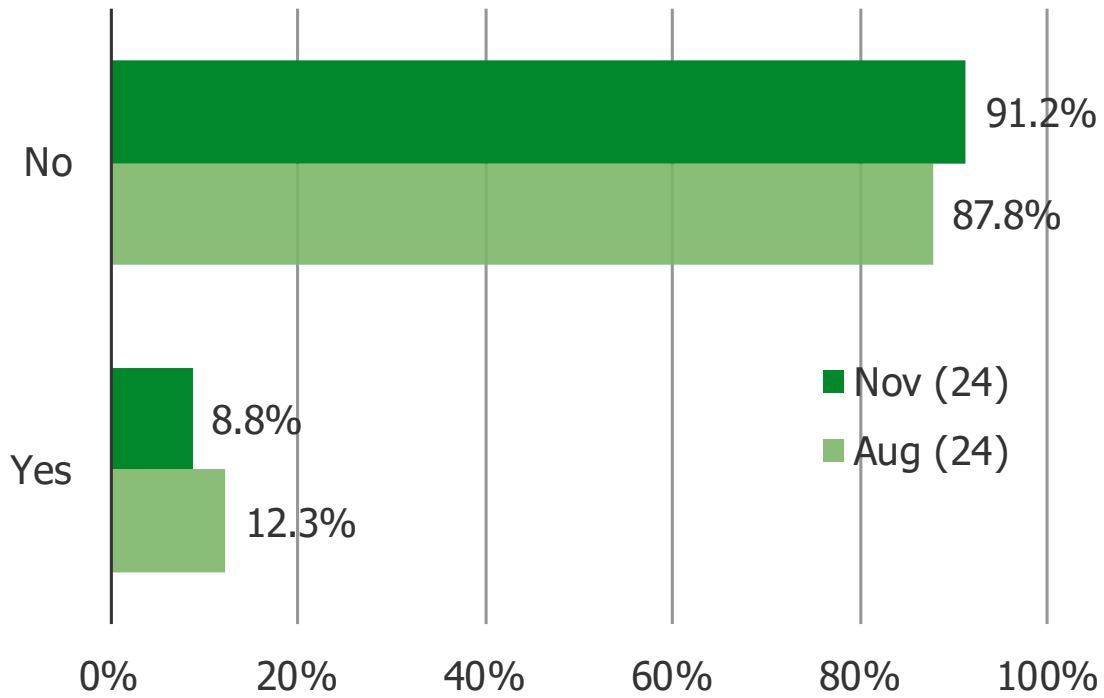
HOW OFTEN DO YOU DRINK ATHLETIC BREWING PRODUCTS?

Posed to all respondents who have tried Athletic Brewing (N = 57).



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

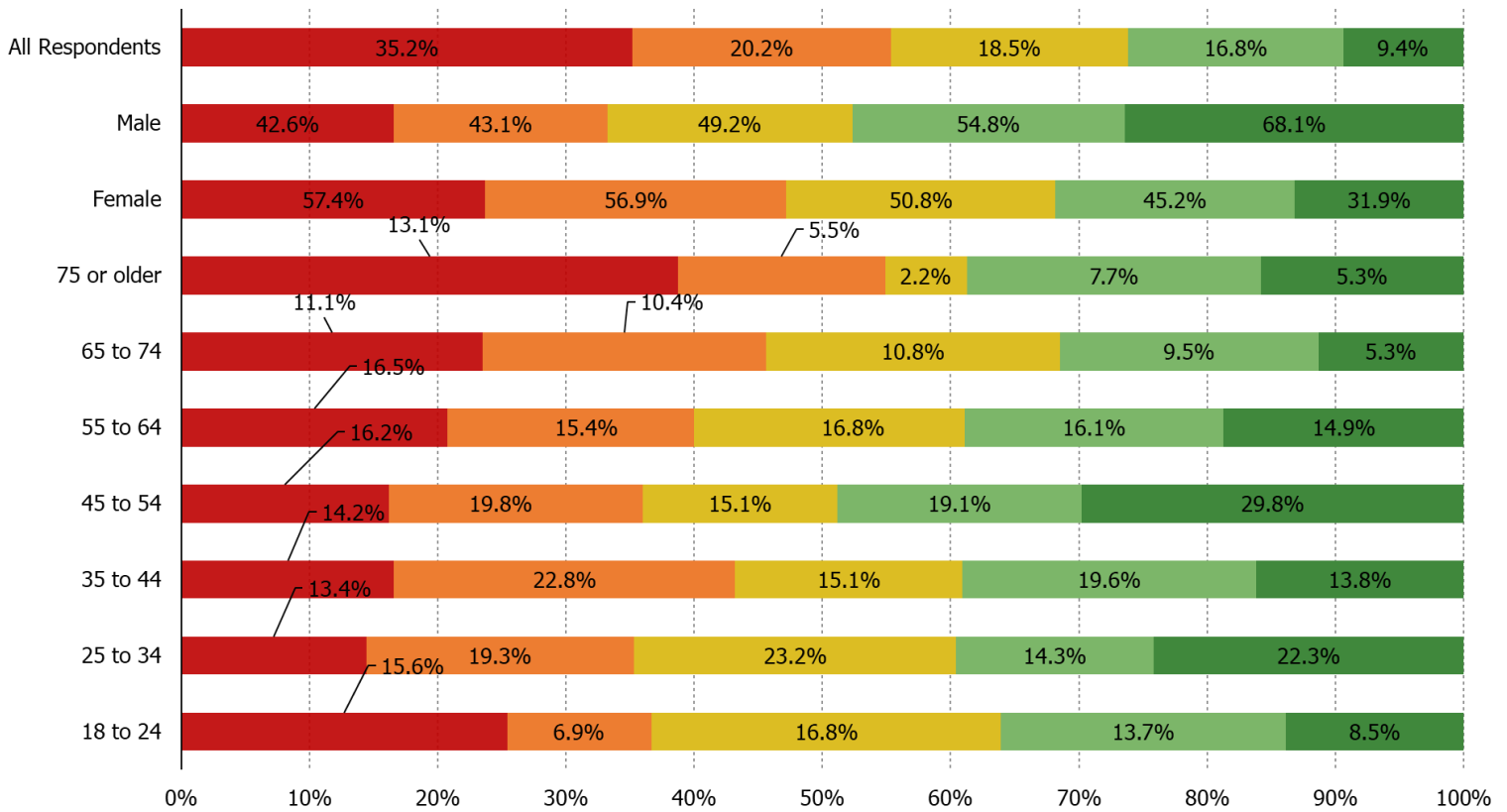
Posed to all respondents who never consume non-alcoholic beer.



HOW OFTEN DO YOU CONSUME ALCOHOLIC BEVERAGES?

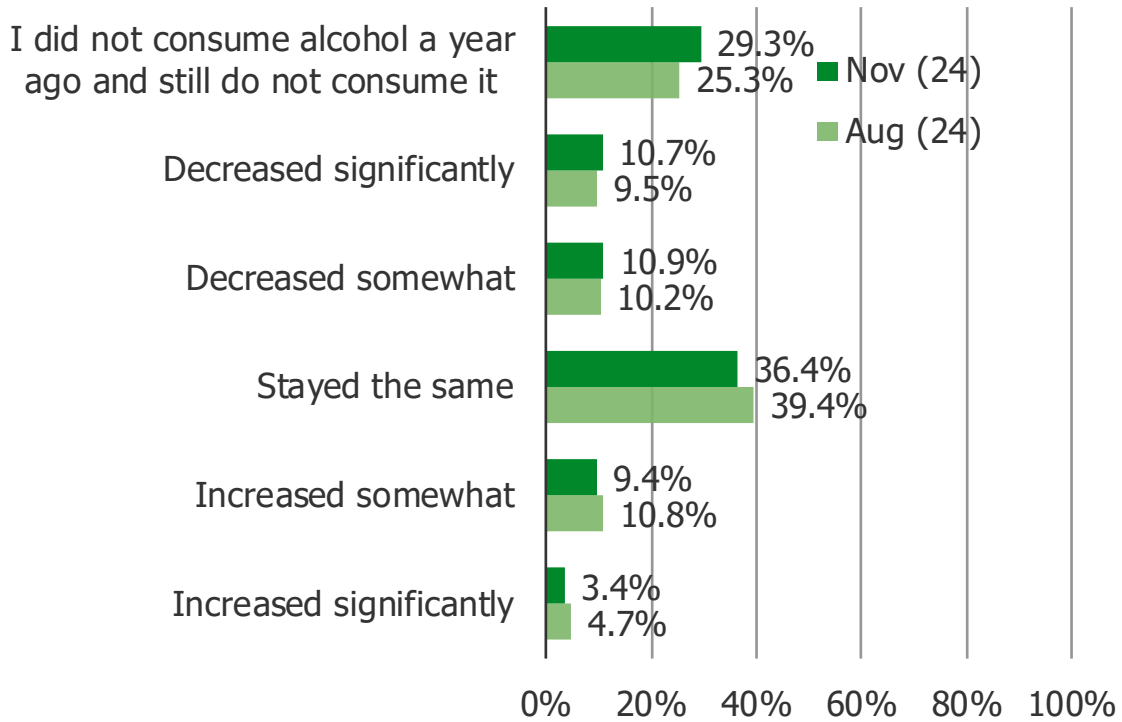
Posed to all respondents

■ Never ■ Rarely (less than once a month) ■ Occasionally (1-3 times a month) ■ Regularly (1-3 times a week) ■ Frequently (more than 3 times a week)



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

Posed to all respondents

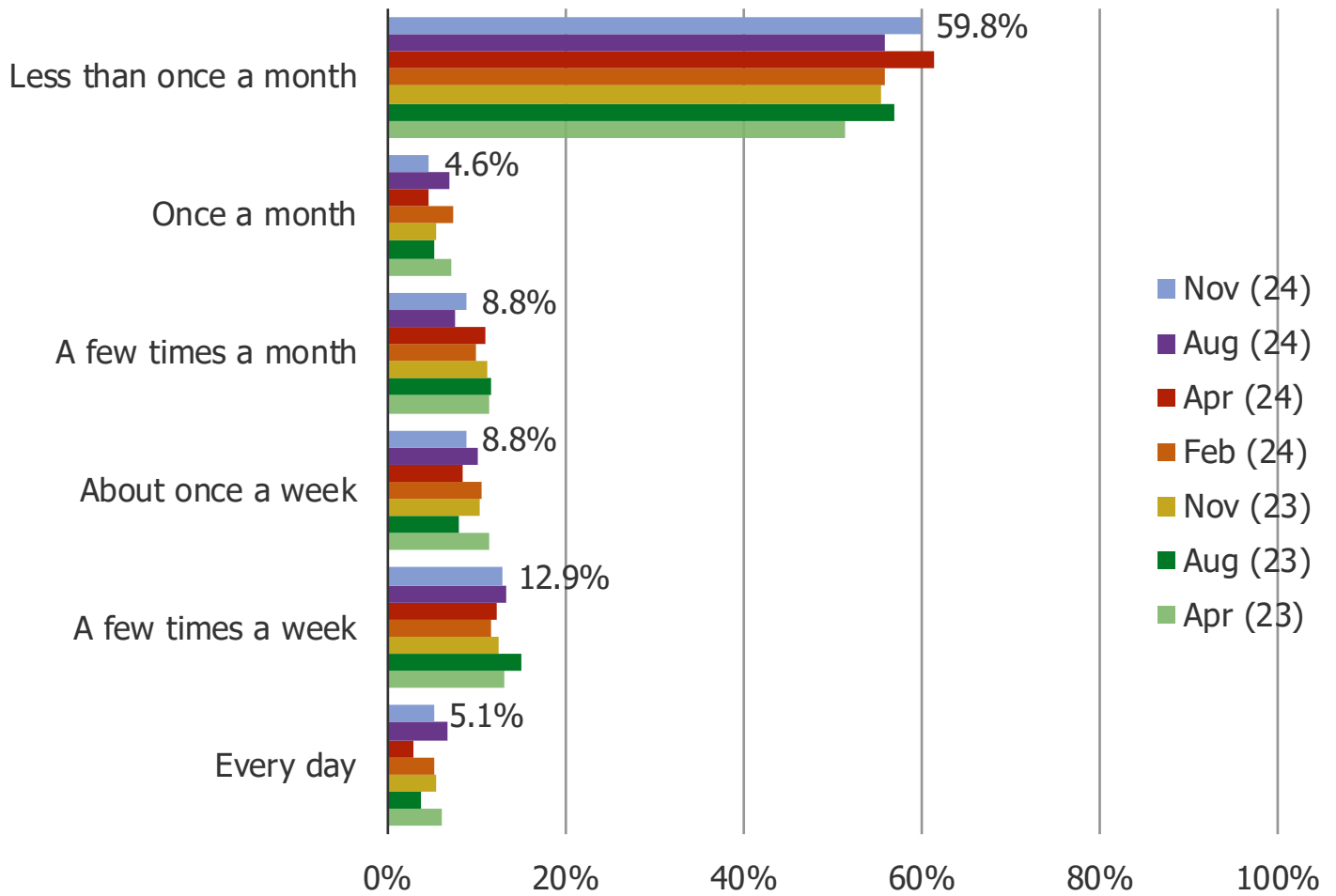


Davids vs. Goliaths

BEER

HOW OFTEN DO YOU DRINK BEER?

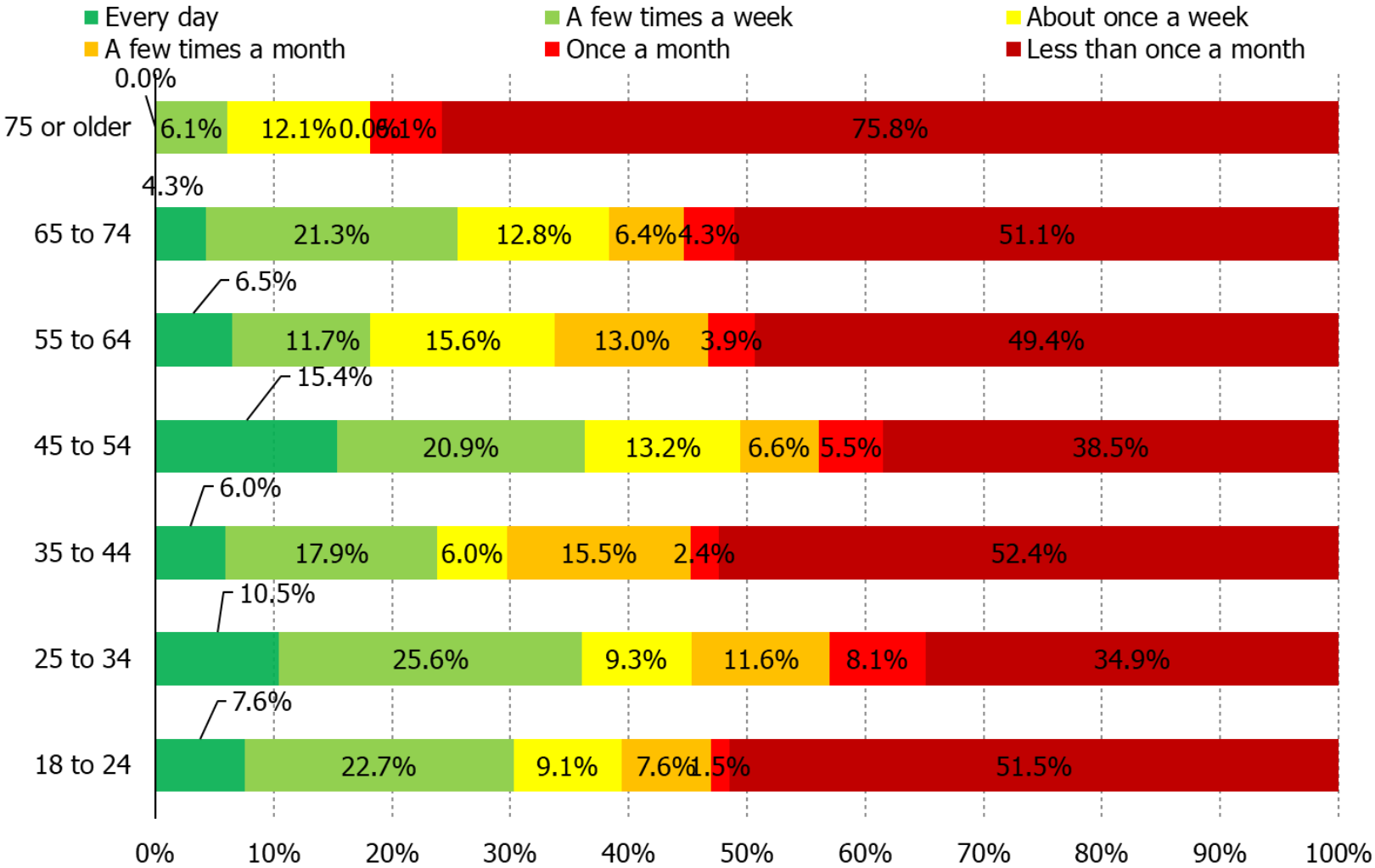
Posed to all respondents



HOW OFTEN DO YOU DRINK BEER?

Posed to all respondents

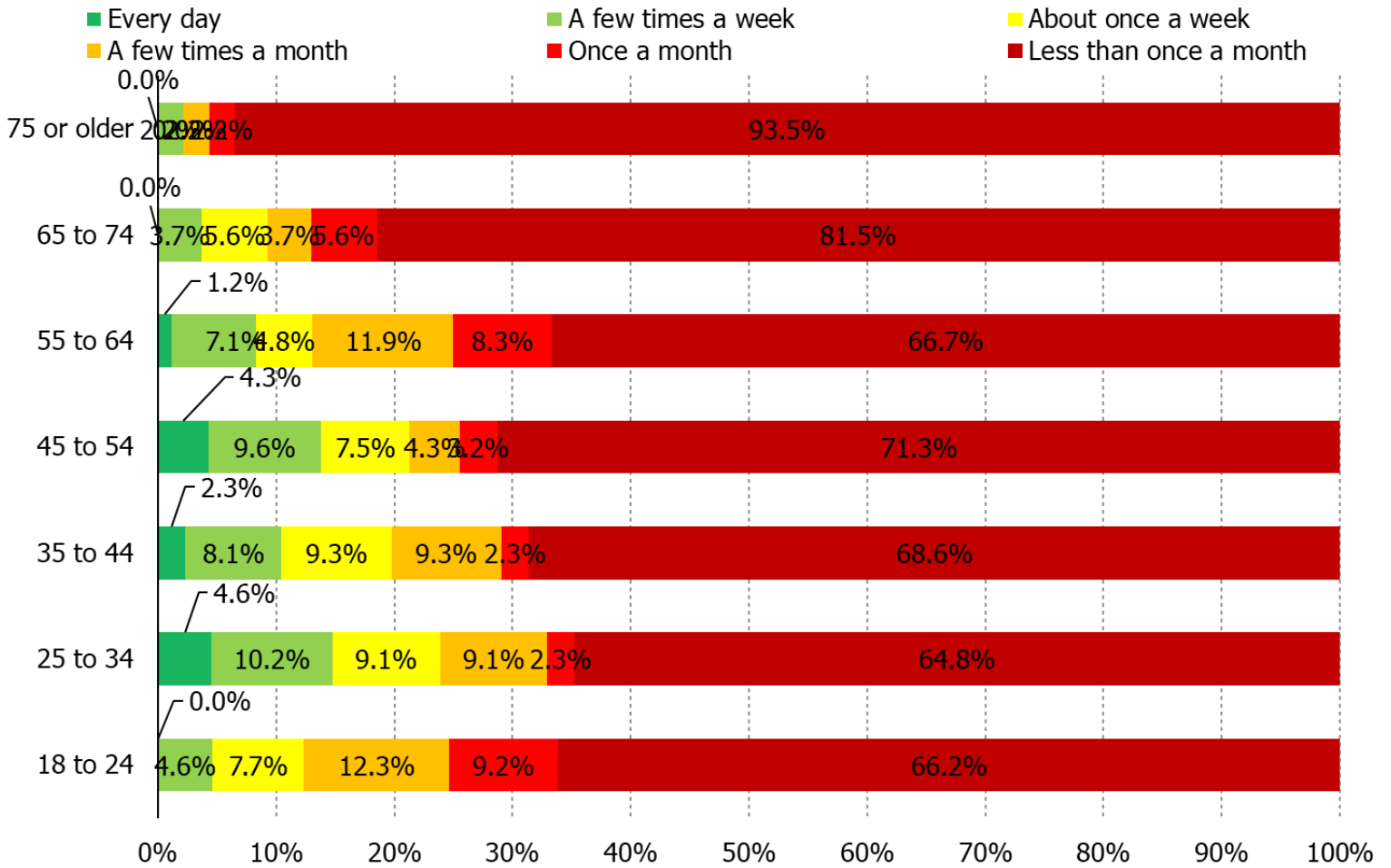
Cross-Tabs: Male, by Age.



HOW OFTEN DO YOU DRINK BEER?

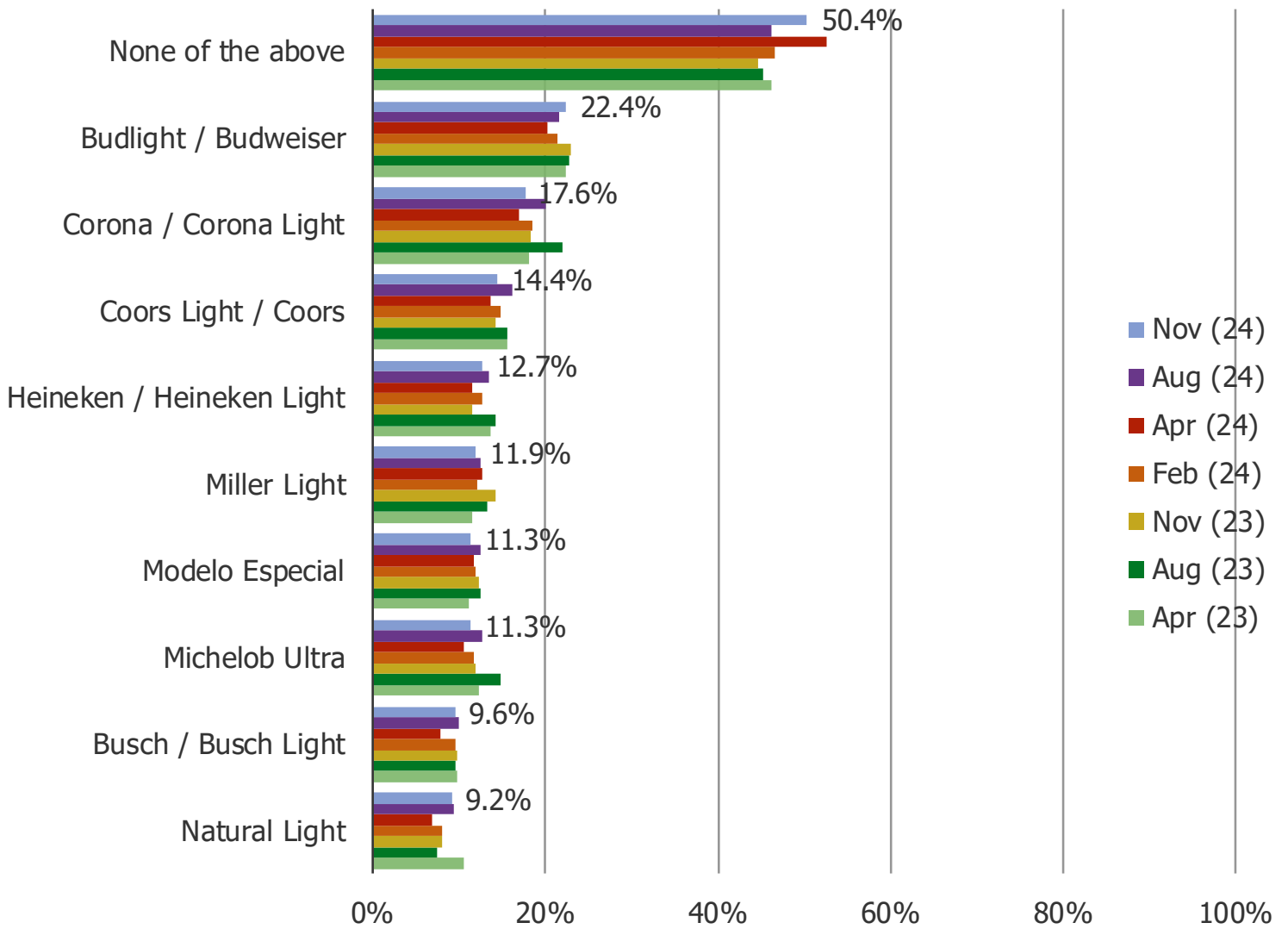
Posed to all respondents

Cross-Tabs: Female, by Age.



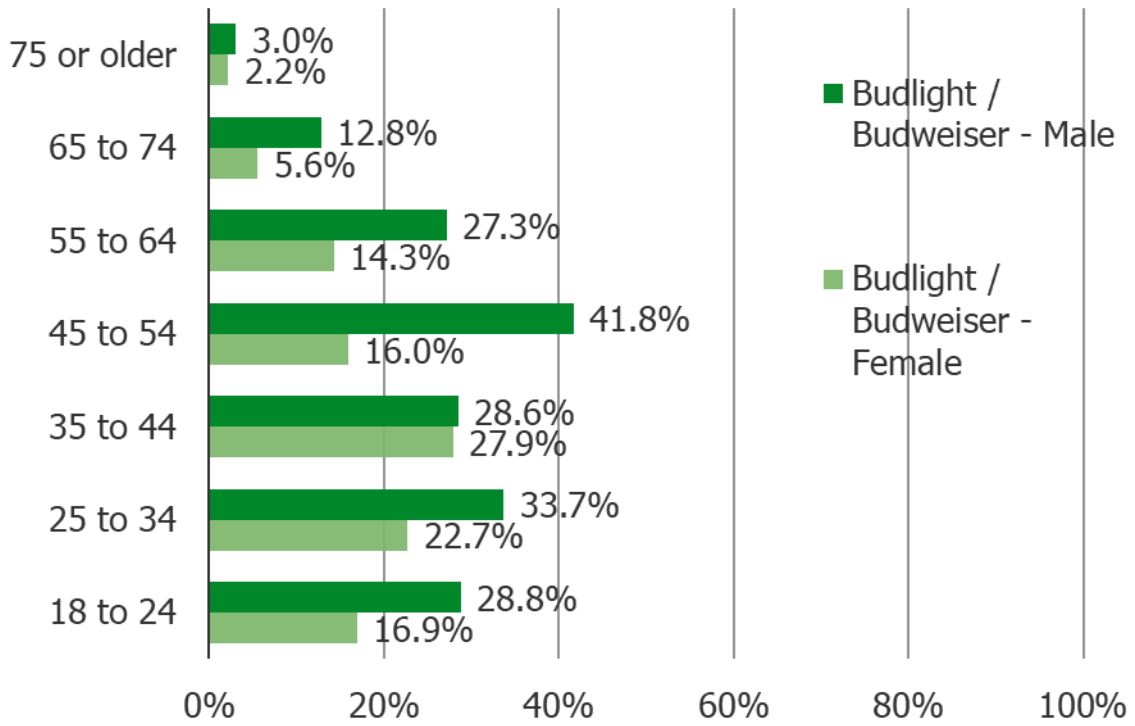
HAVE YOU PURCHASED BEER FROM ANY OF THE FOLLOWING IN THE PAST YEAR?

Posed to all respondents



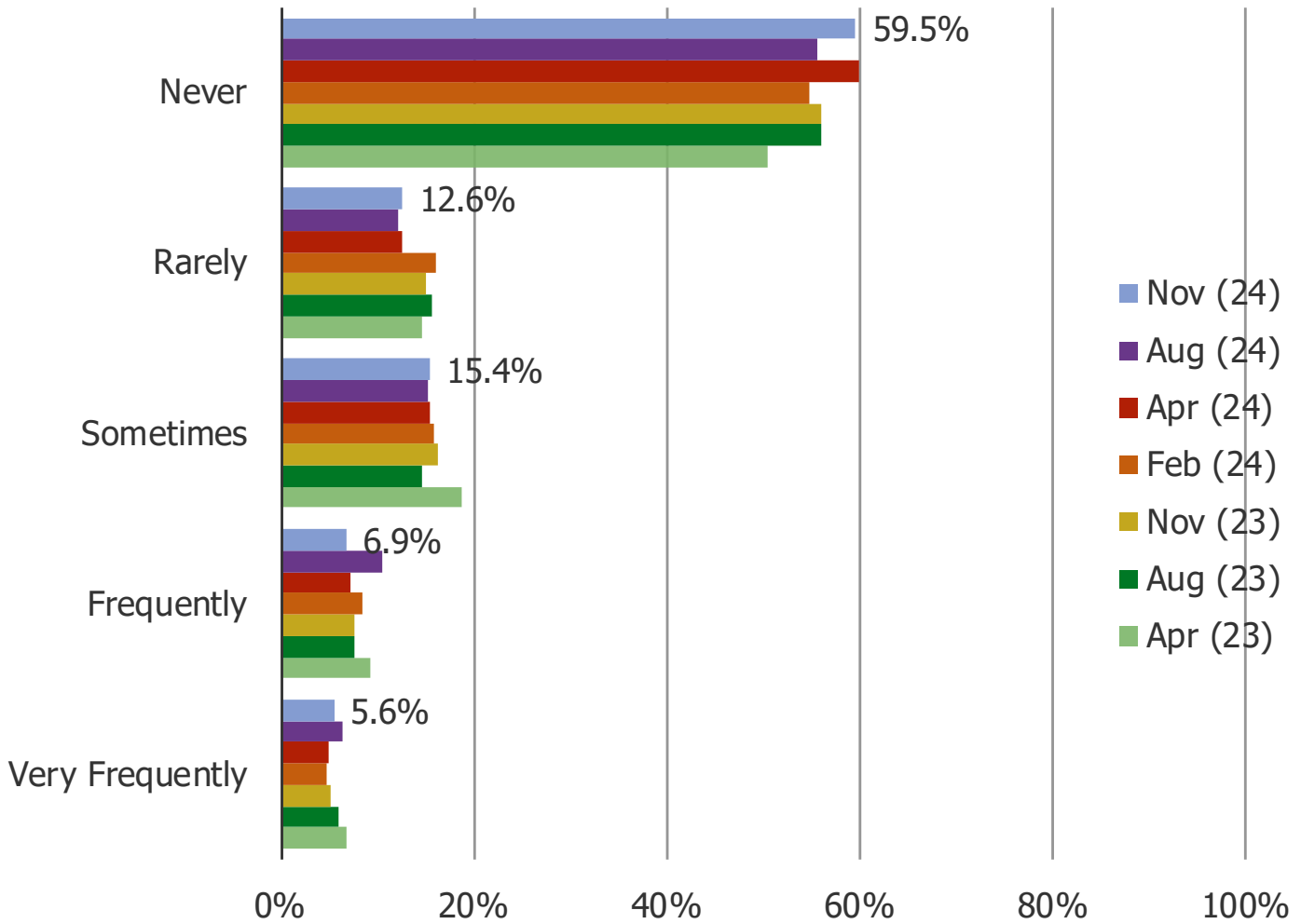
% HAS PURCHASED BUD LIGHT IN THE PAST YEAR, BY GENDER AND AGE

Posed to all respondents



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

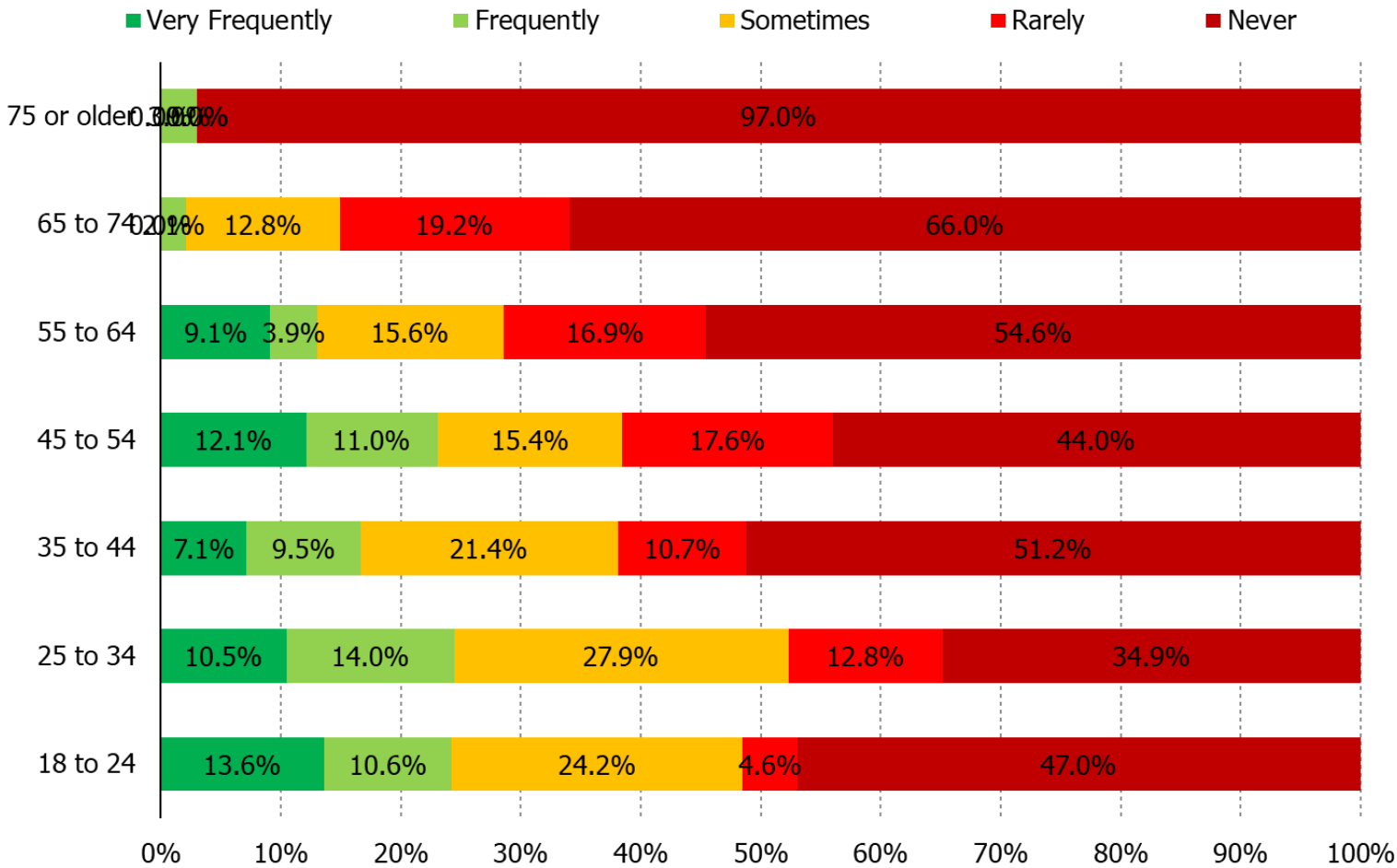
Posed to all respondents



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

Posed to all respondents

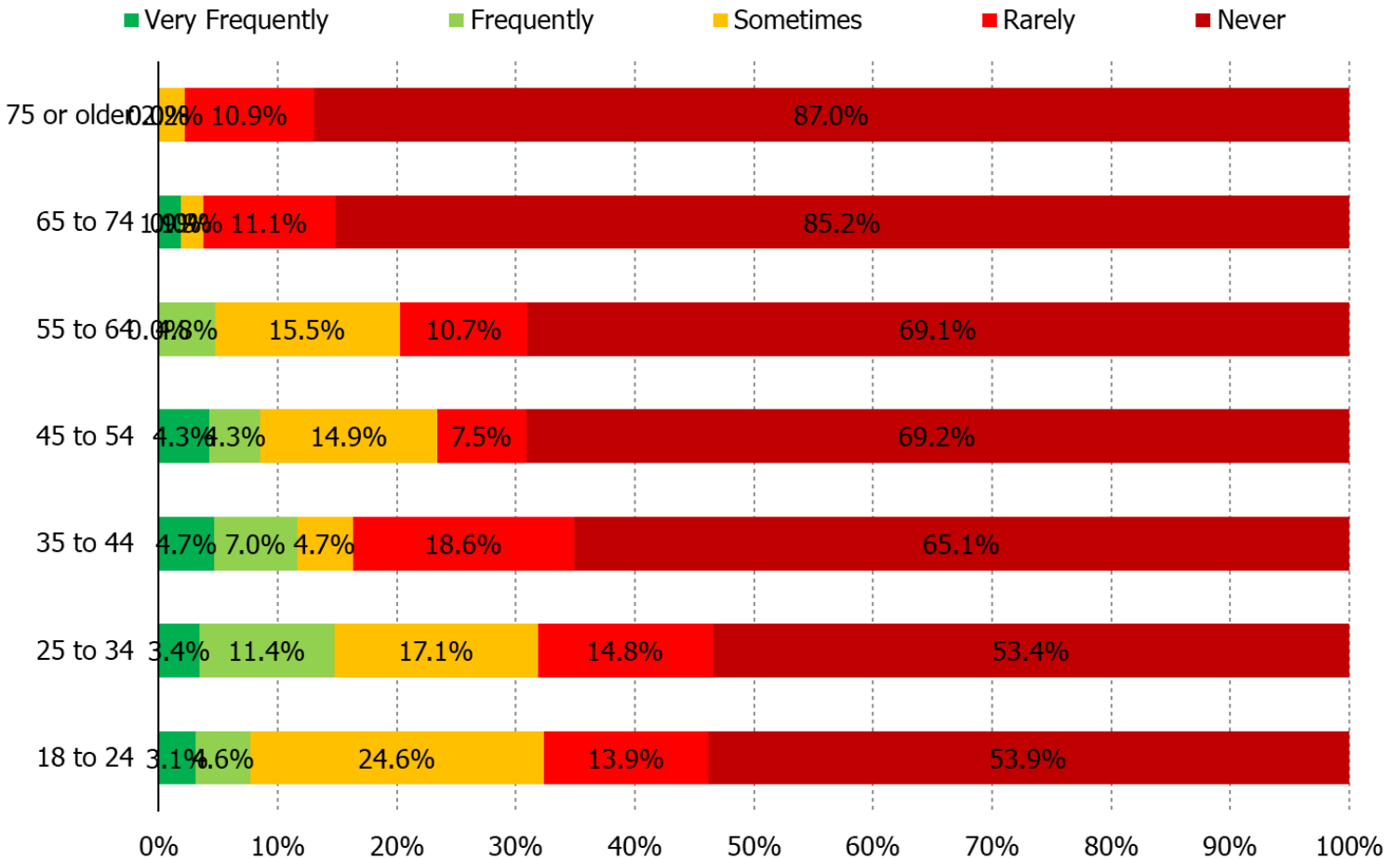
Cross-Tabs: Male, by Age.



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

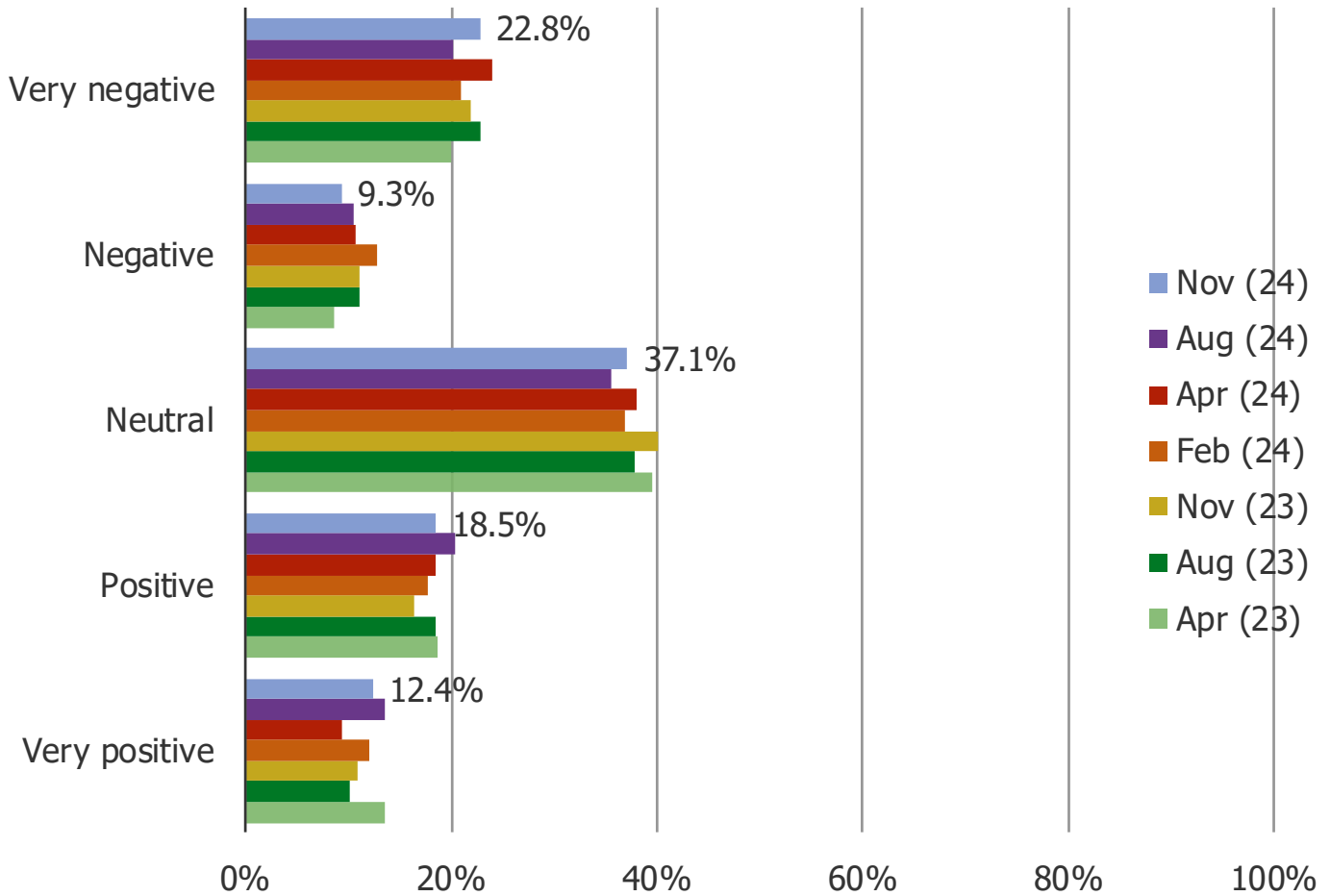
Posed to all respondents

Cross-Tabs: Female, by Age.



WHAT IS YOUR OPINION OF BUD LIGHT / BUDWEISER?

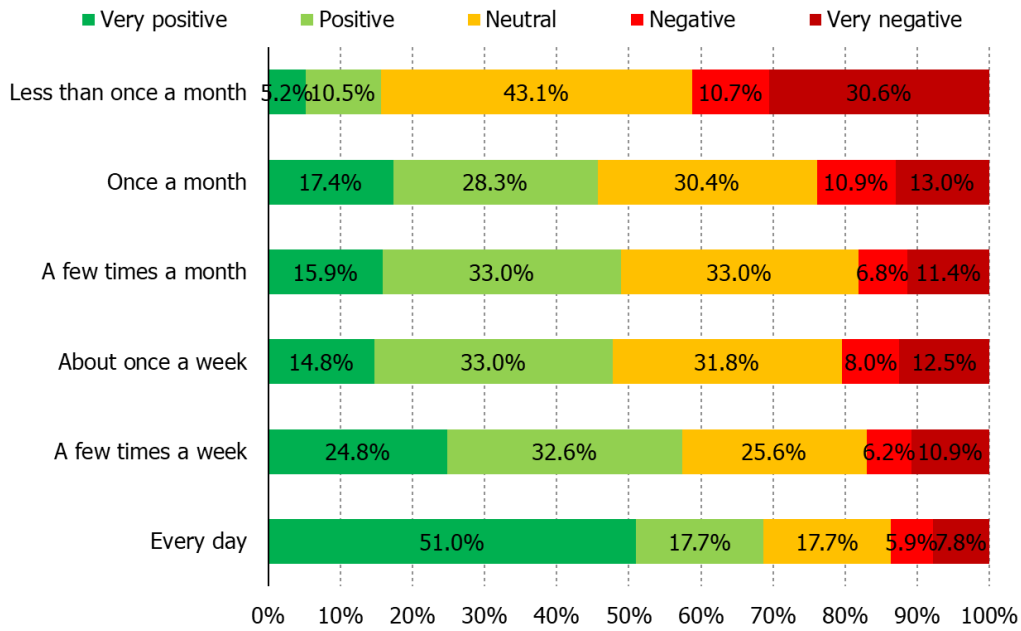
Posed to all respondents



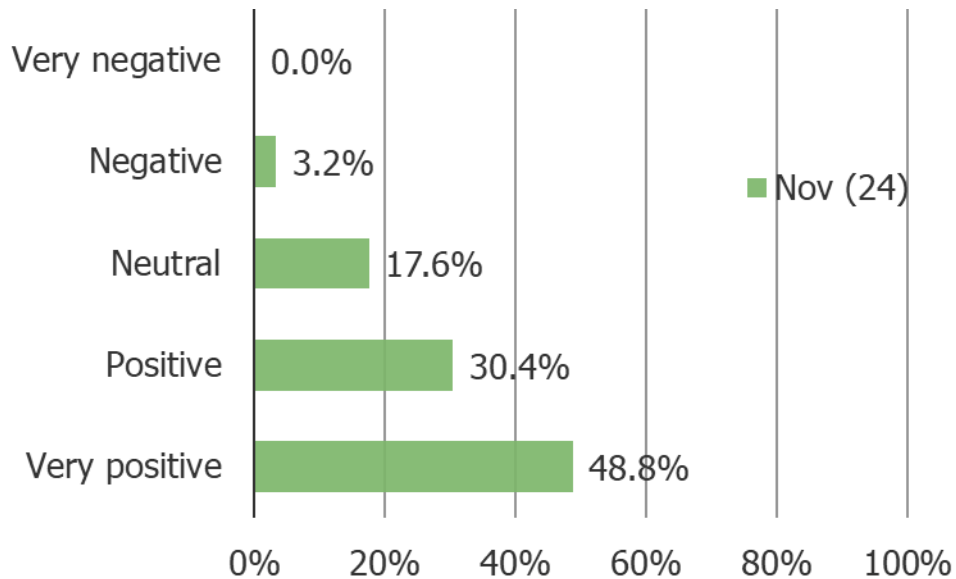
WHAT IS YOUR OPINION OF BUD LIGHT / BUDWEISER?

Posed to all respondents

Cross-Tab: By how often respondents drink beer



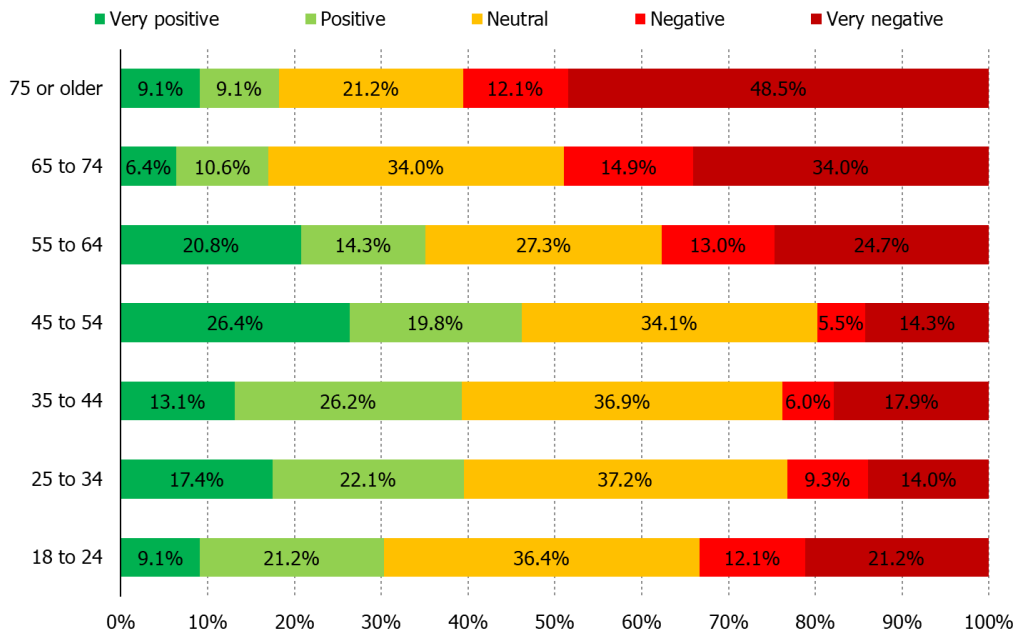
Filter: In the past year purchased Bud Light frequently or very frequently.



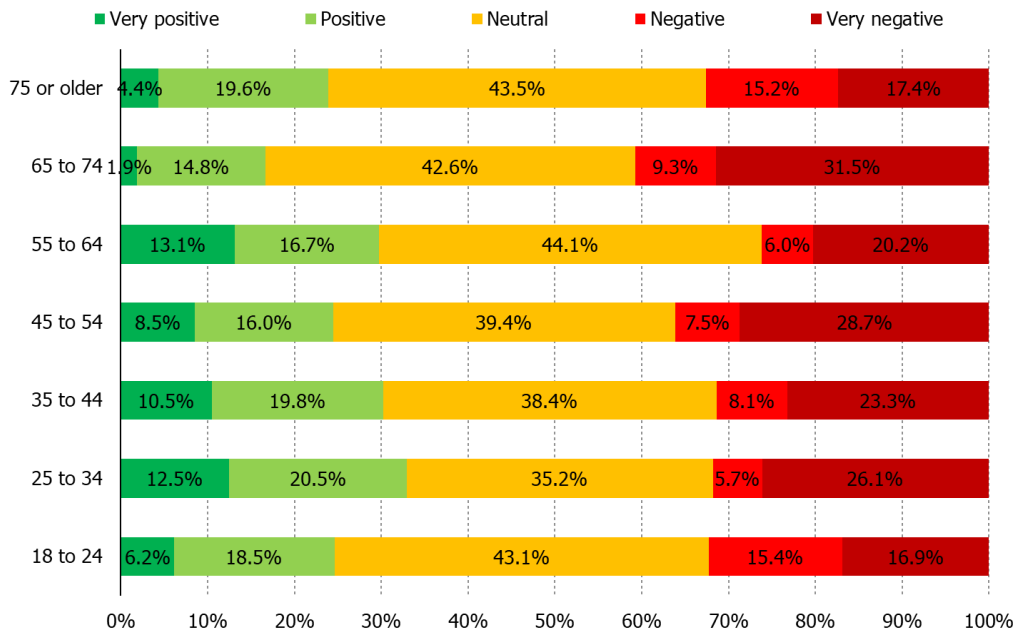
WHAT IS YOUR OPINION OF BUD LIGHT / BUDWEISER?

Posed to all respondents

Cross-Tab: Male and age

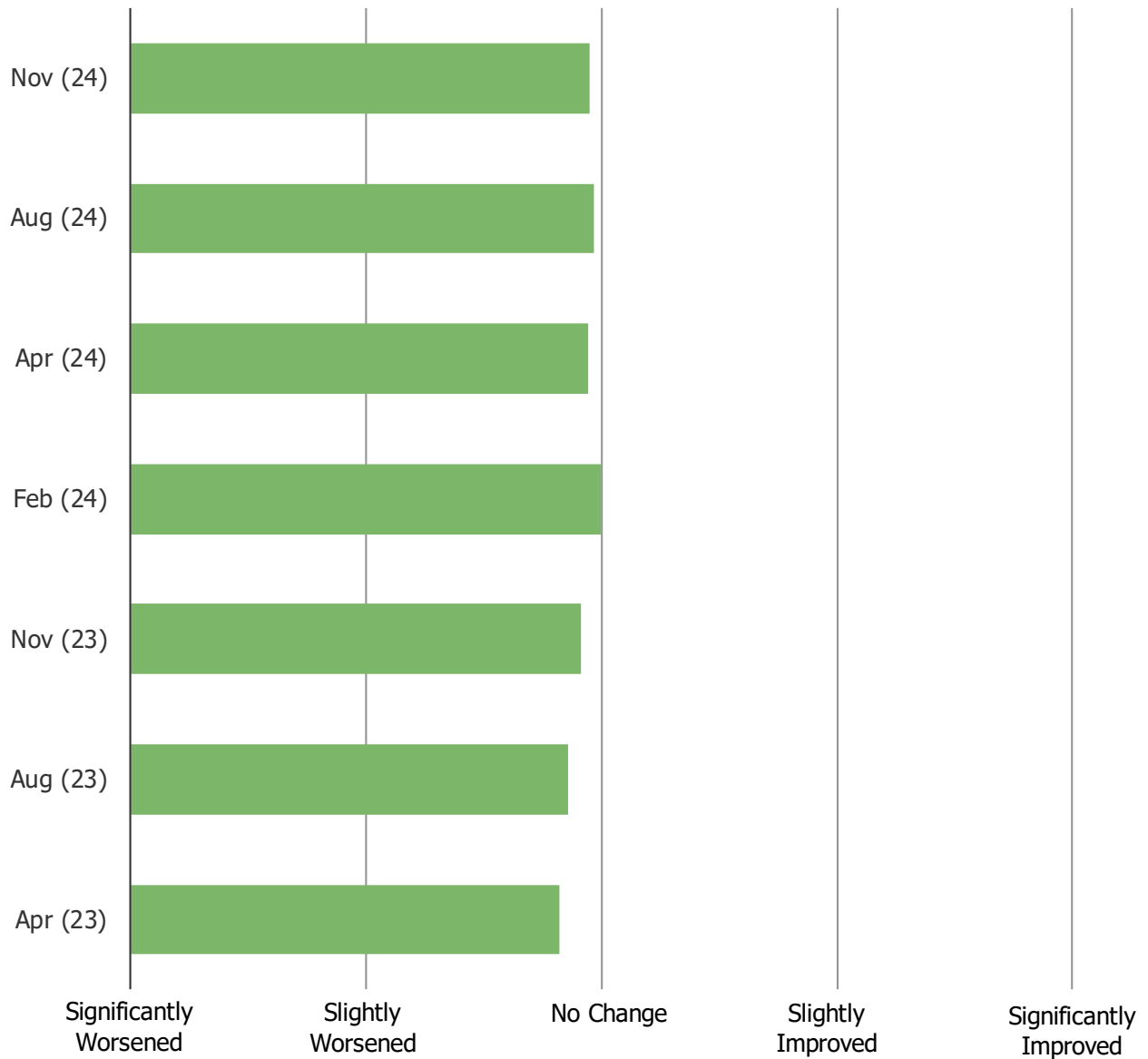


Cross-Tab: Female and age



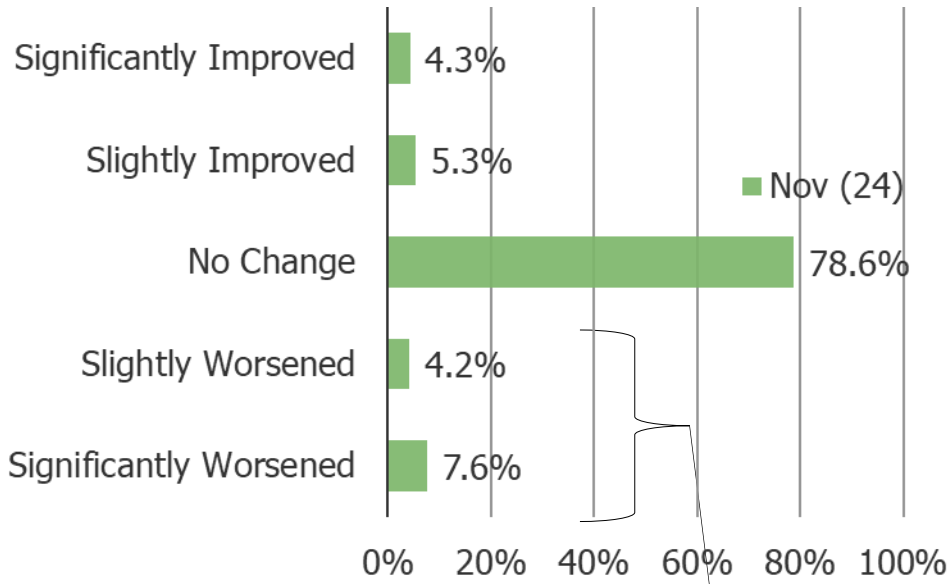
HAS YOUR OPINION OF BUD LIGHT / BUDWEISER CHANGED IN THE PAST MONTH?

Posed to all respondents



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

Posed to all respondents



Why?

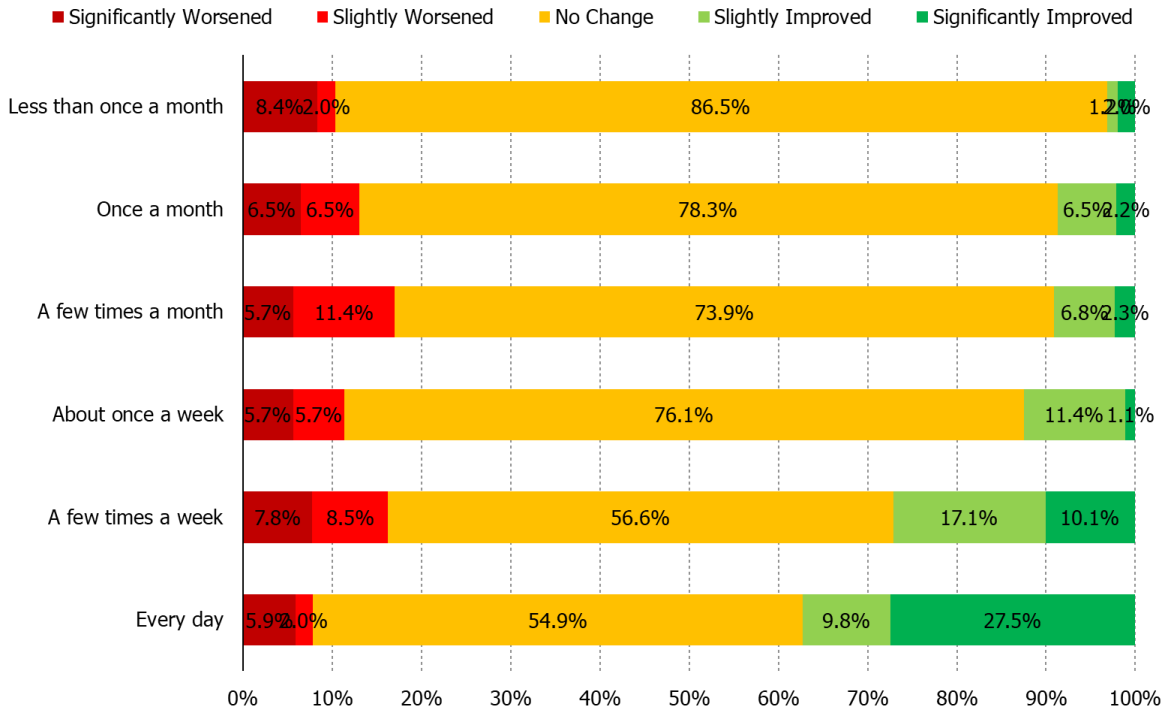
August 2024 Fill-Ins



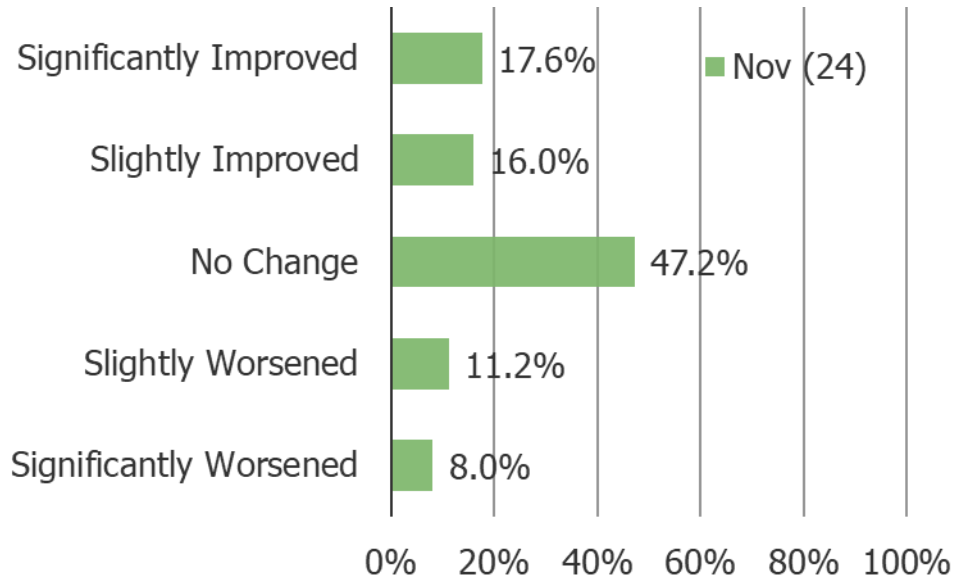
HAS YOUR OPINION OF BUD LIGHT / BUDWEISER CHANGED IN THE PAST MONTH?

Posed to all respondents

Cross-Tab: By how often respondents drink beer



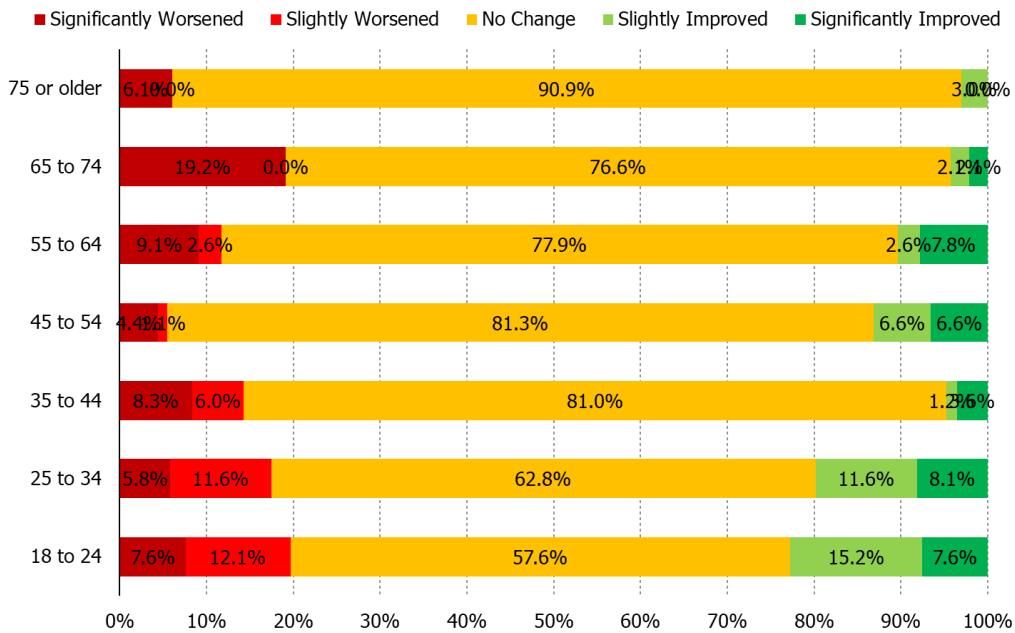
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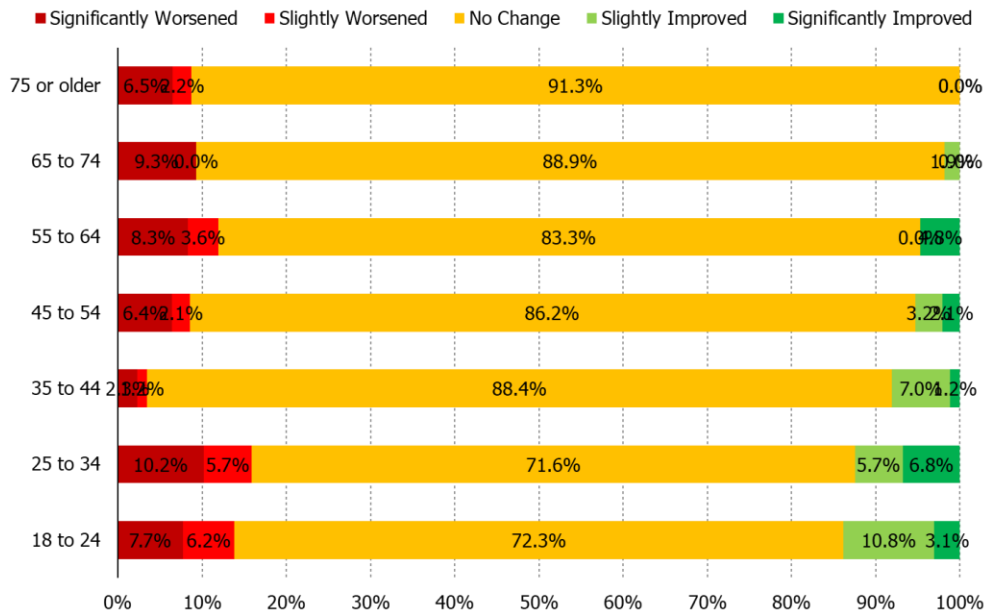
HAS YOUR OPINION OF BUD LIGHT / BUDWEISER CHANGED IN THE PAST MONTH?

Posed to all respondents

Cross-Tab: Male and age

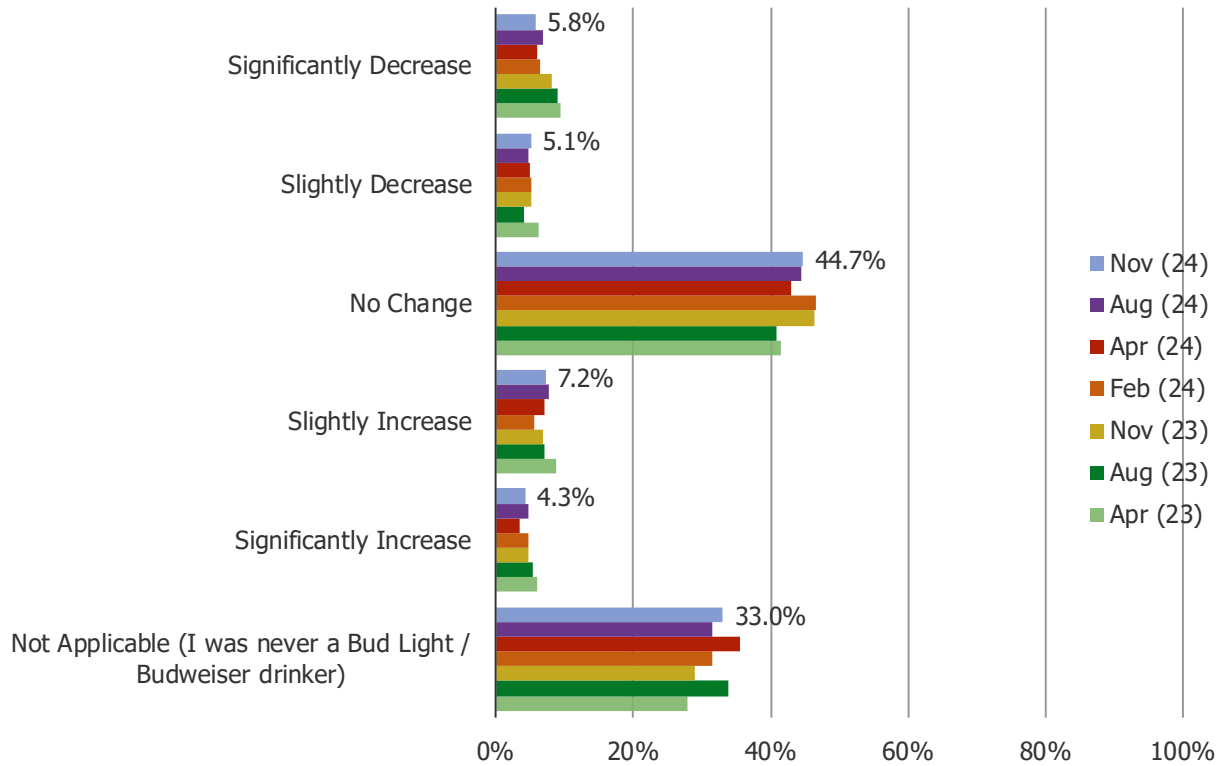


Cross-Tab: Female and age



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

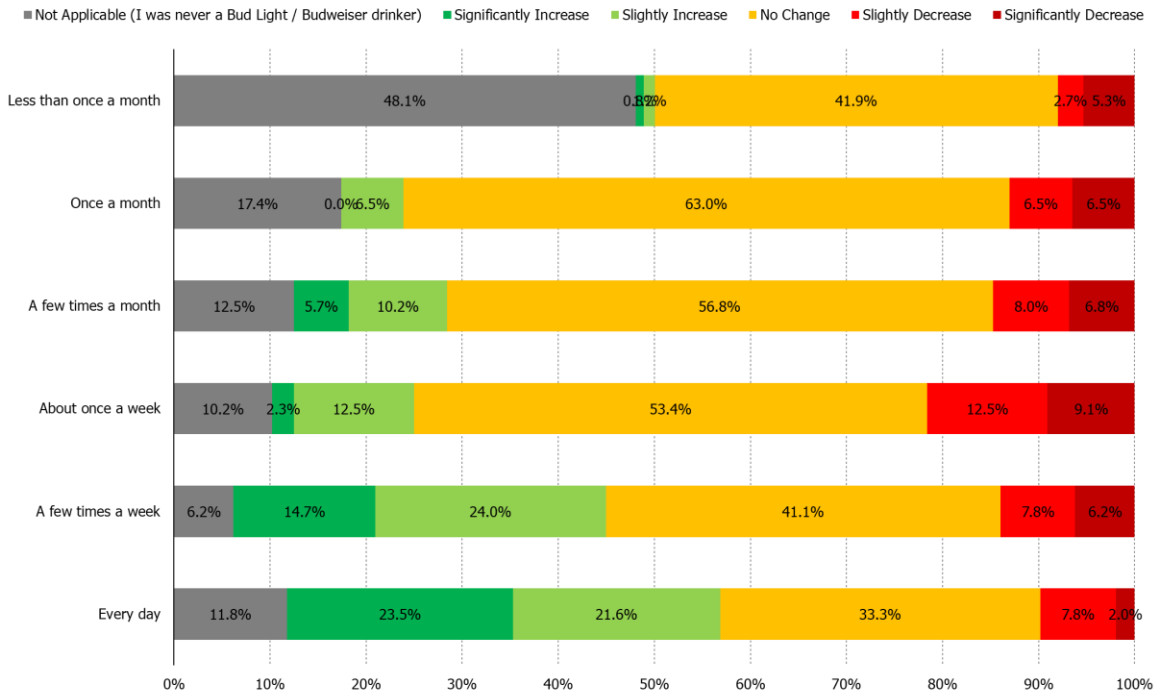
Posed to all respondents



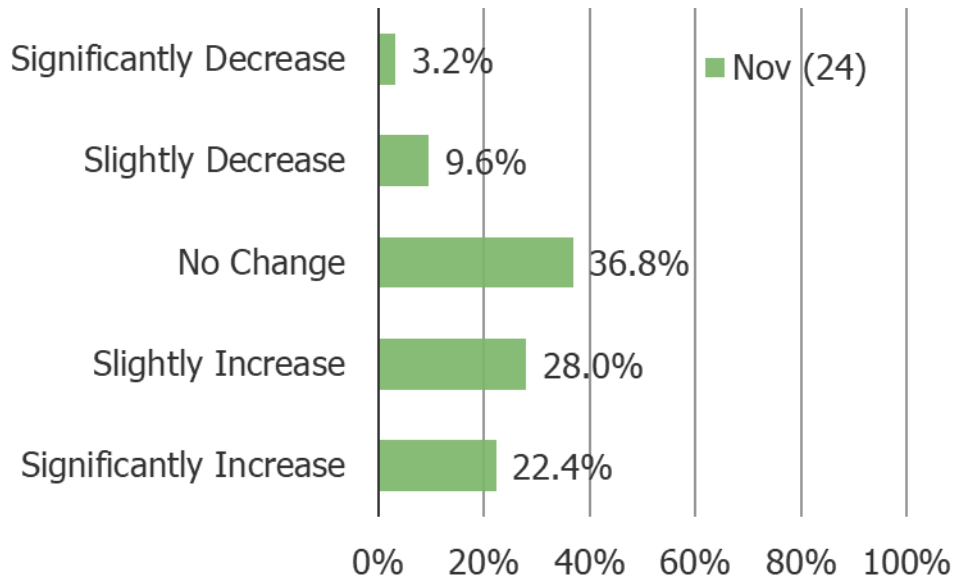
DOING FORWARD, WILL YOU WILL INCREASE OR DECREASE YOUR PURCHASING OF BUD LIGHT / BUDWEISER?

Posed to all respondents

Cross-Tab: By how often respondents drink beer



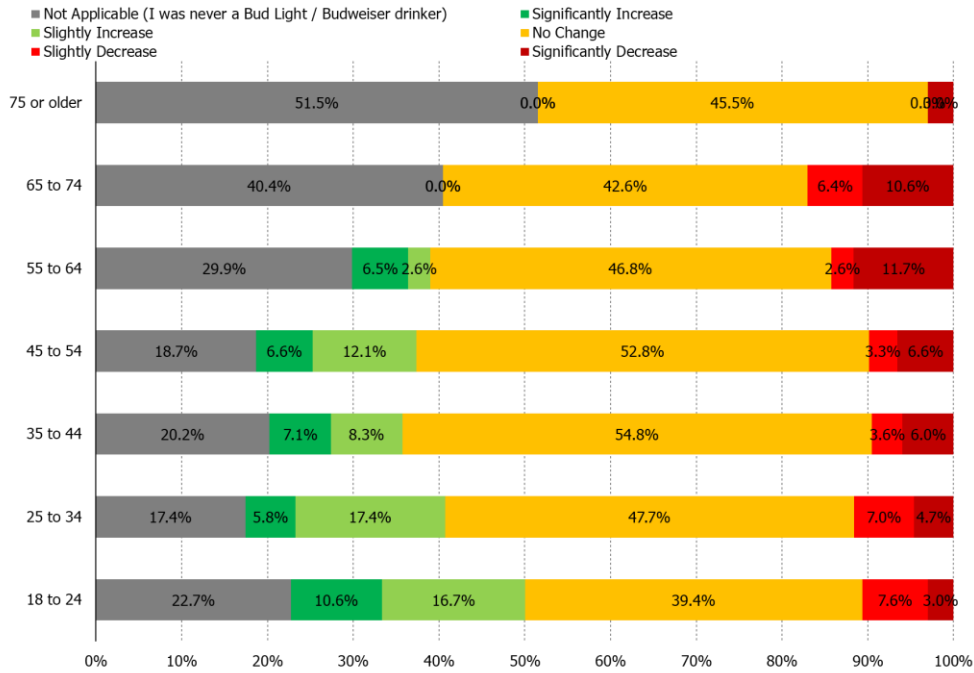
Filter: In the past year purchased Bud Light frequently or very frequently.



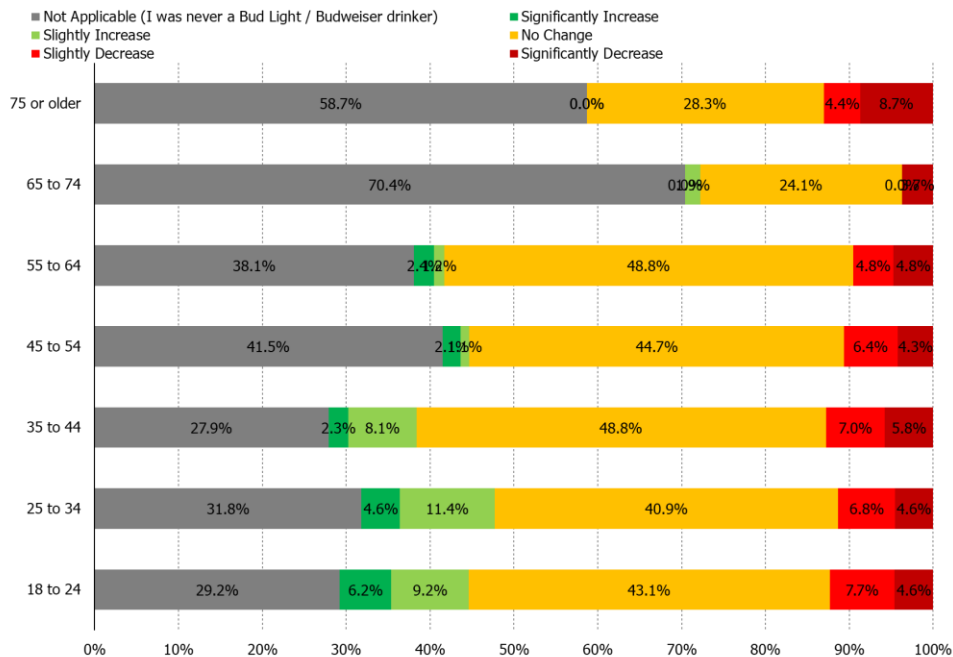
GOING FORWARD, WILL YOU WILL INCREASE OR DECREASE YOUR PURCHASING OF BUD LIGHT / BUDWEISER?

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?

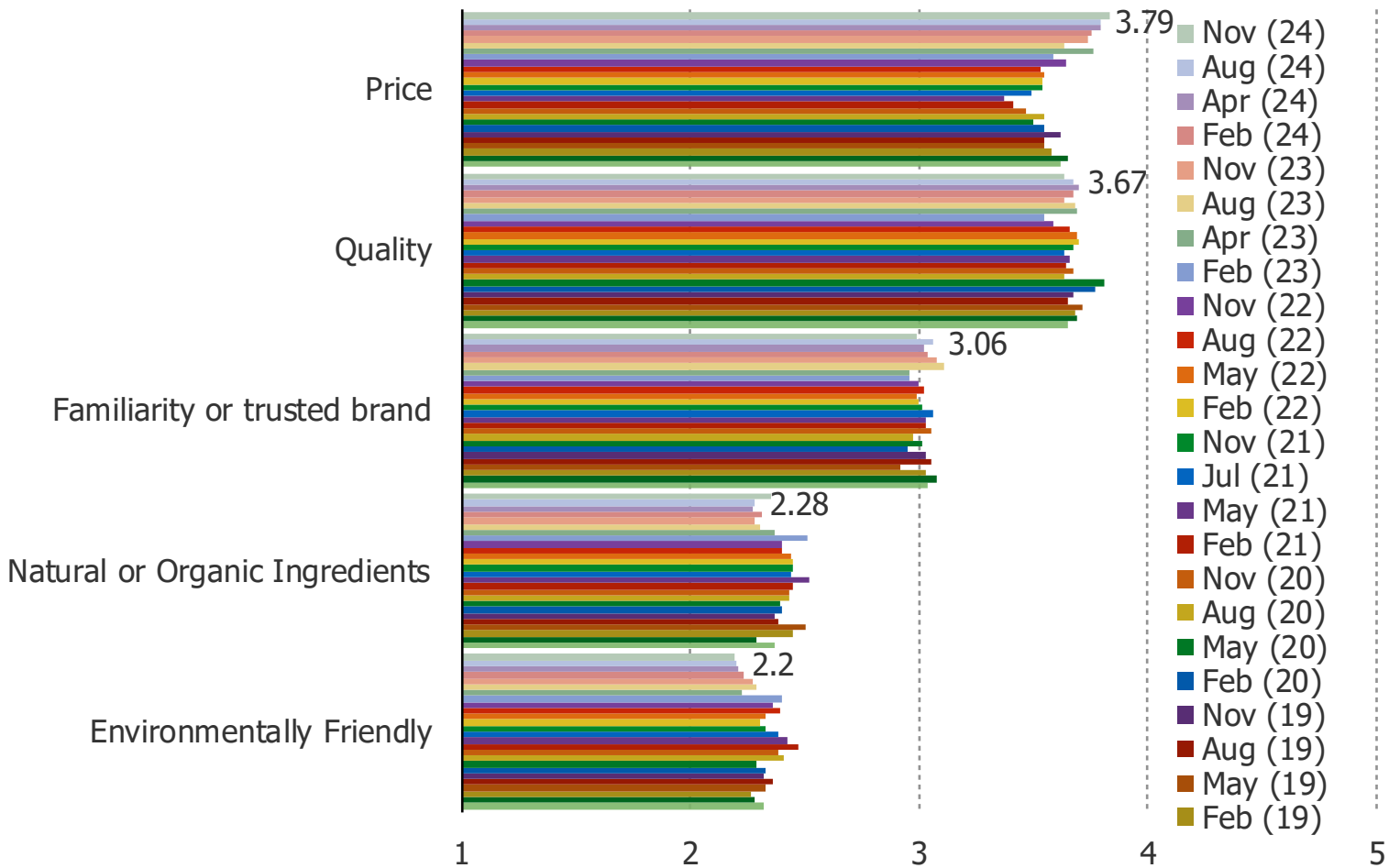
Posed to all respondents who would decrease purchases of Bud Light/Budweiser.



CPGS OVERALL

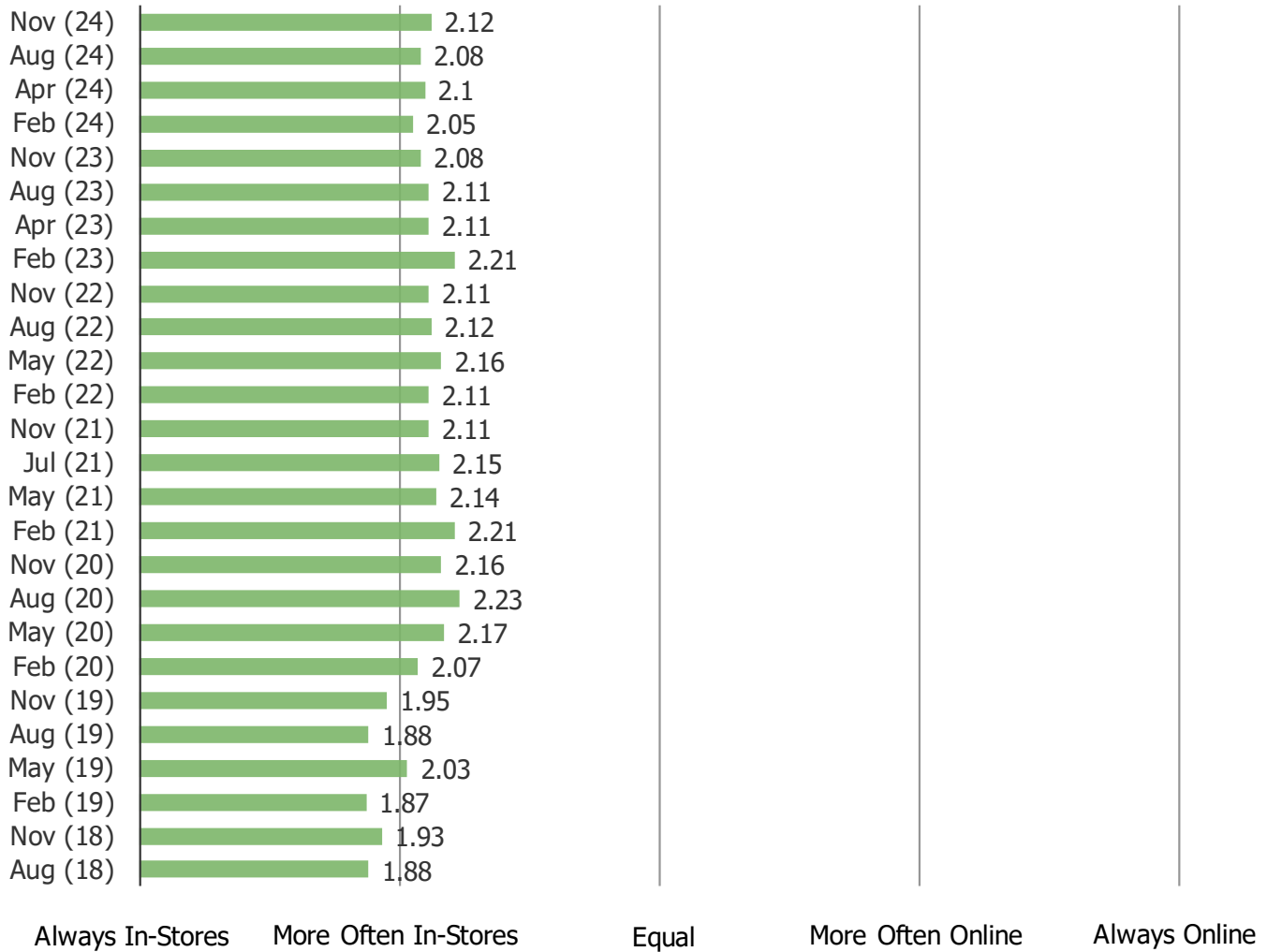
PLEASE RANK WHICH ARE MOST IMPORTANT TO YOU WHEN IT COMES TO PURCHASING PERSONAL CARE AND HOUSEHOLD ITEMS.

Posed to all respondents



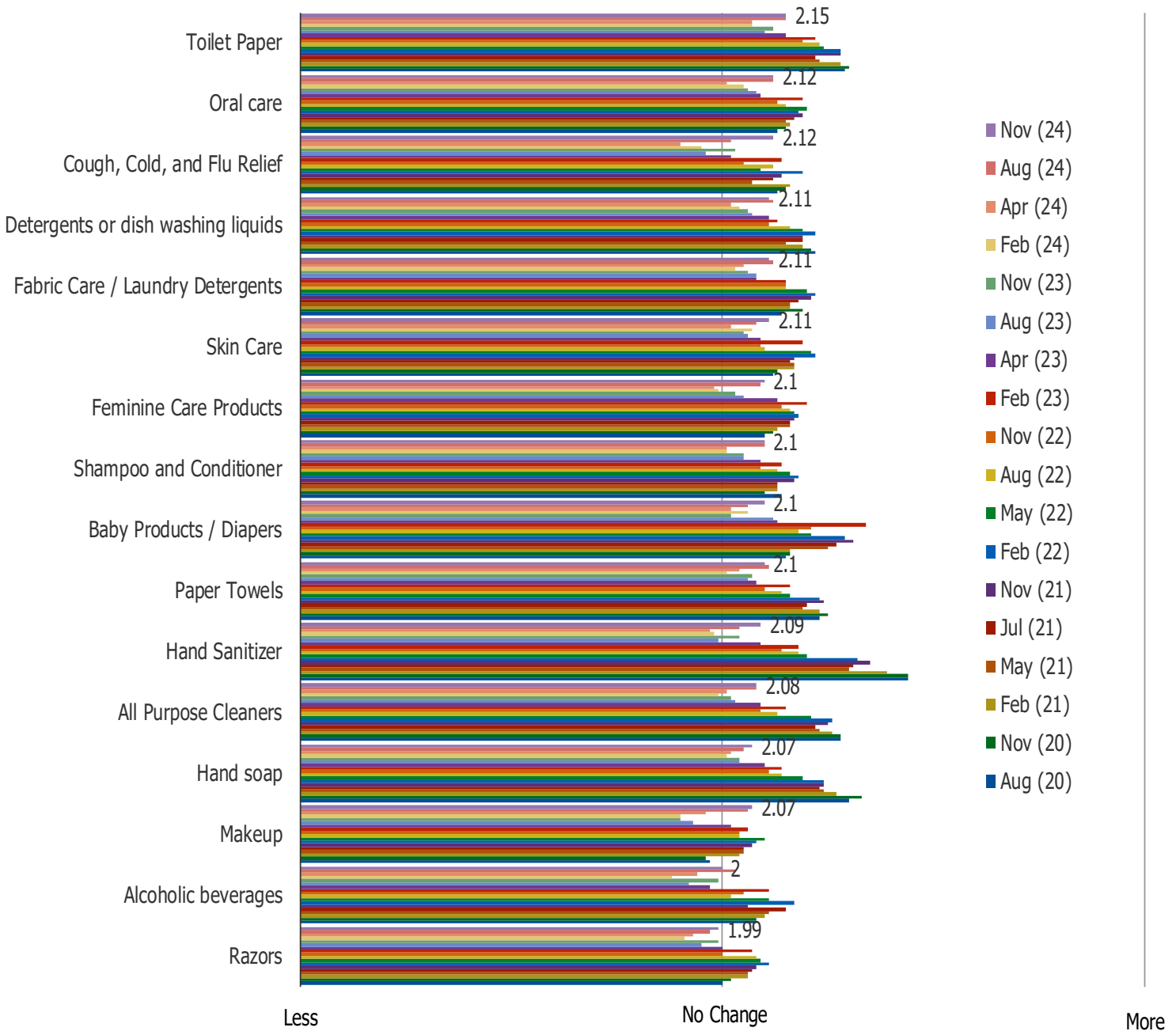
WHERE DO YOU BUY HOUSEHOLD AND PERSONAL CARE ITEMS?

Posed to all respondents



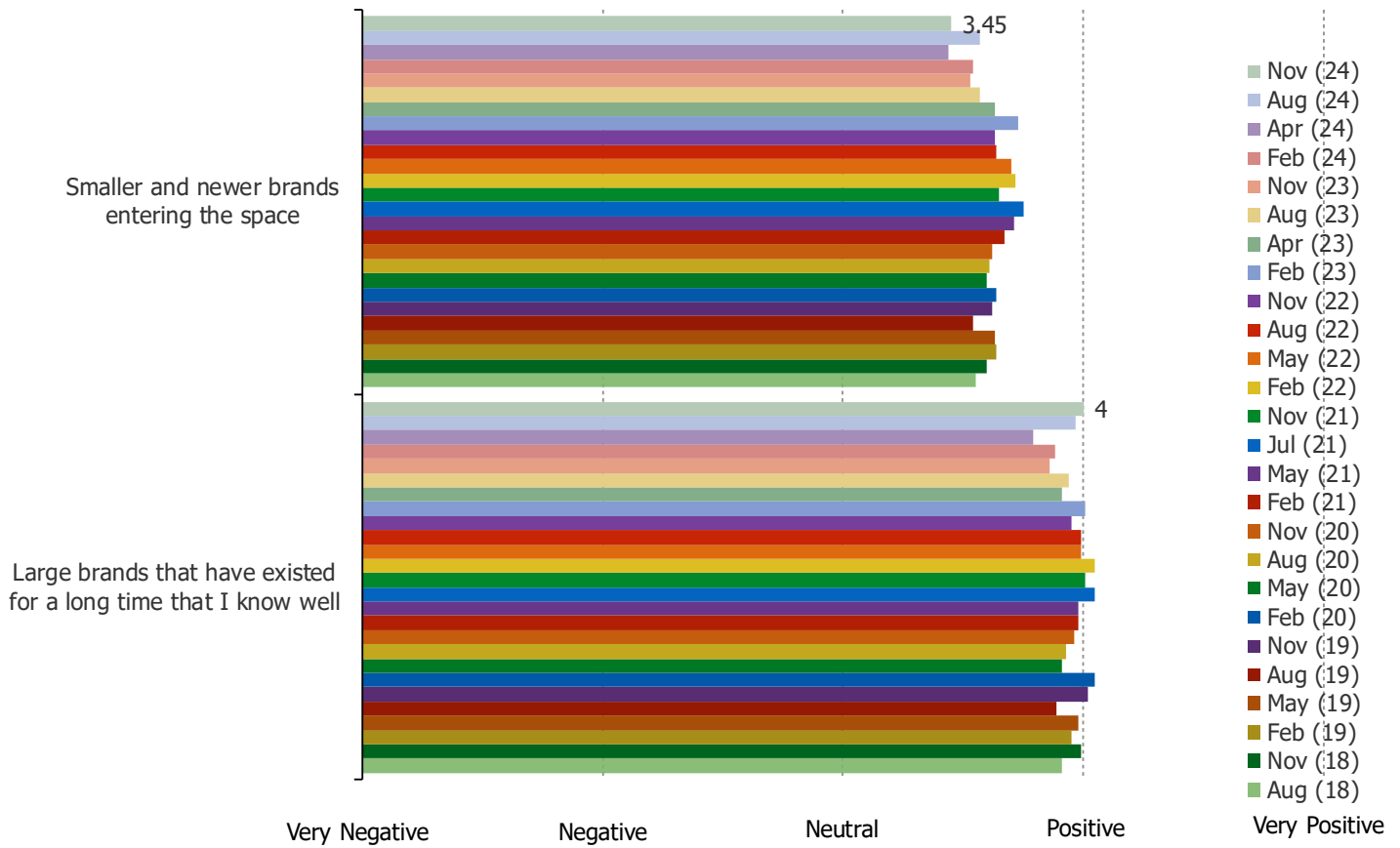
GOING FORWARD, DO YOU EXPECT TO SPEND MORE OR LESS THAN NORMAL ON THE FOLLOWING PRODUCTS?

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



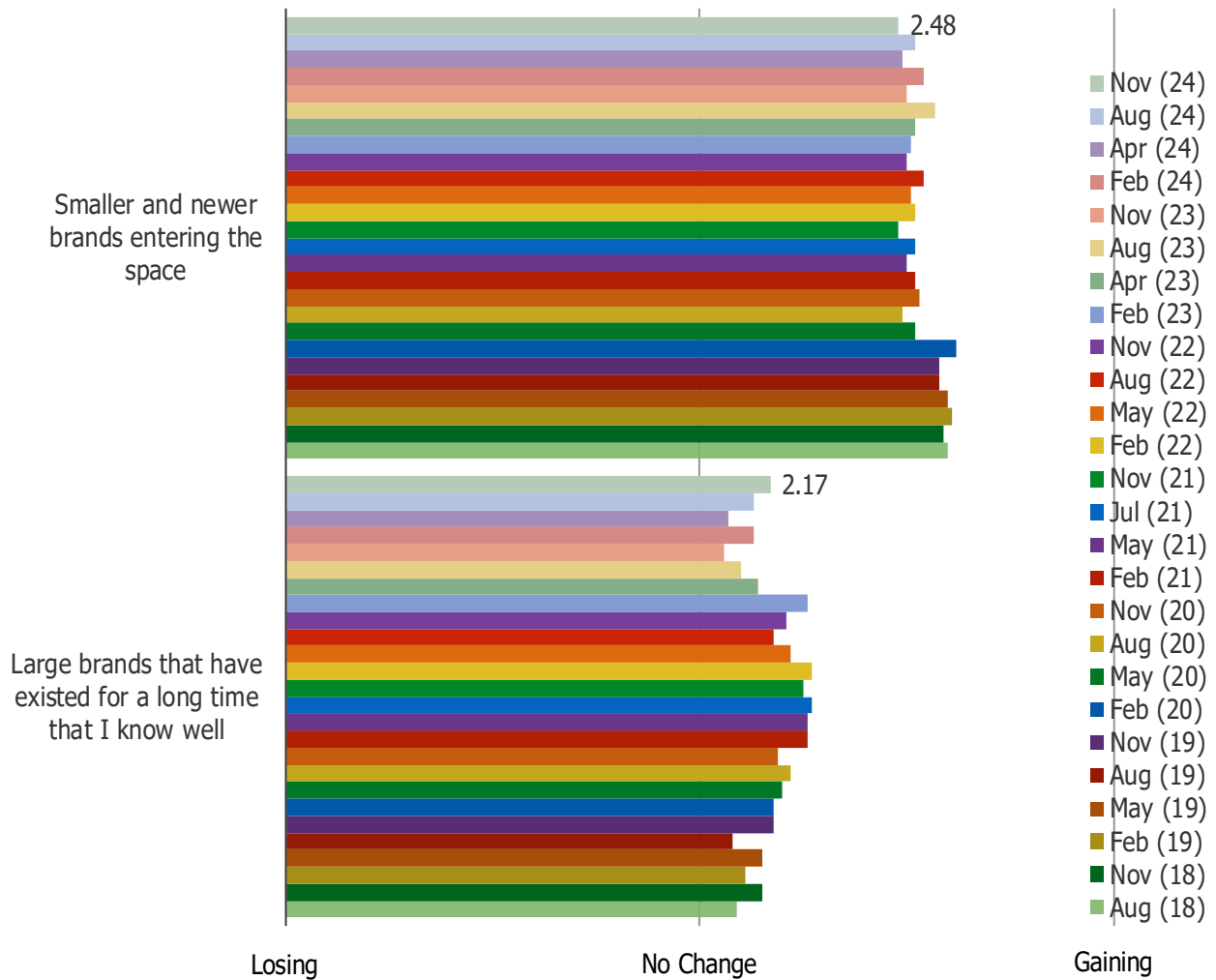
WHEN IT COMES TO HOUSEHOLD AND PERSONAL CARE PRODUCTS, WHAT IS YOUR OPINION OF THE FOLLOWING?

Posed to all respondents



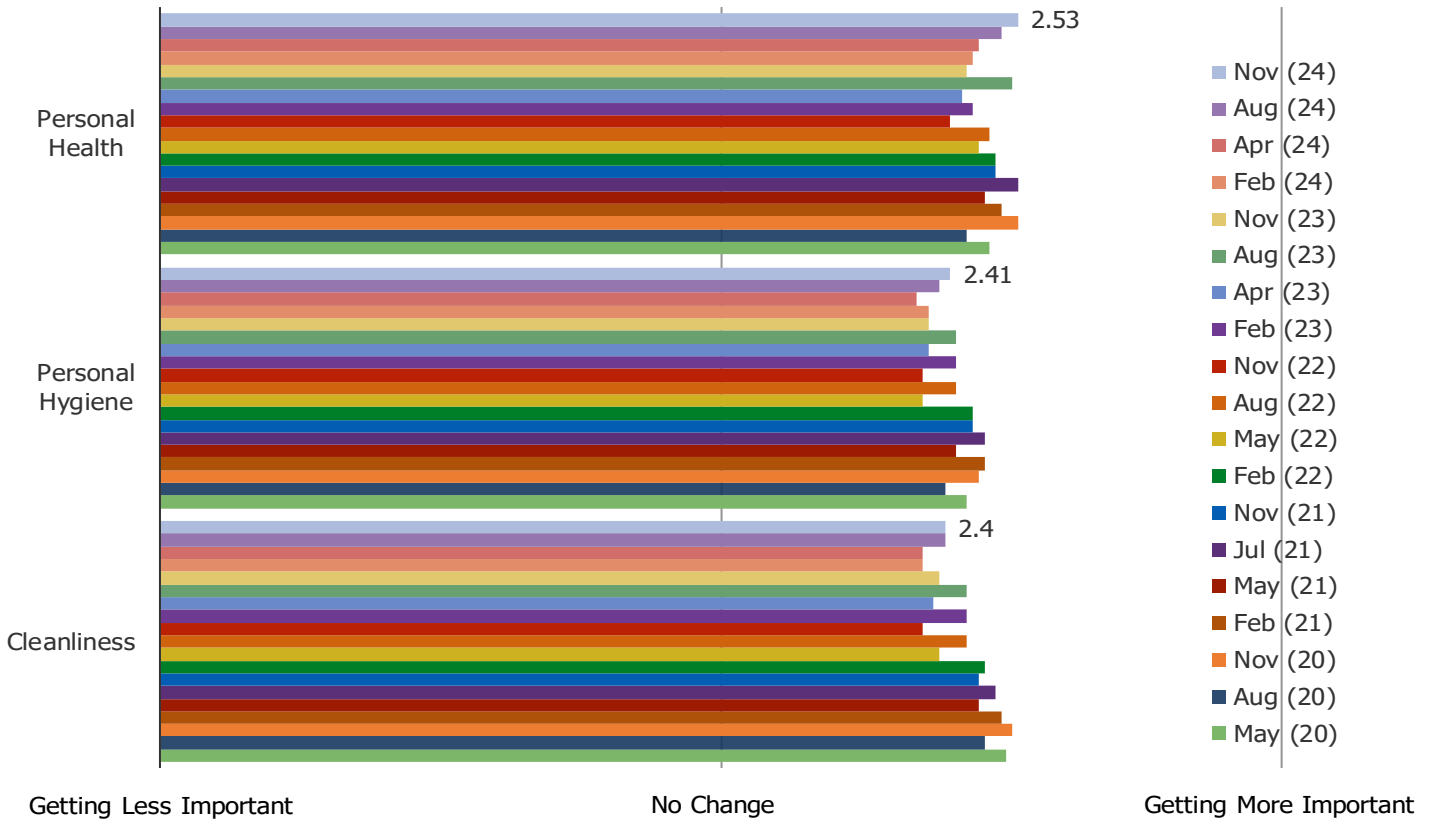
WHEN IT COMES TO HOUSEHOLD AND PERSONAL CARE PRODUCTS, DO YOU FEEL THE FOLLOWING ARE GAINING OR LOSING POPULARITY?

Posed to all respondents



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

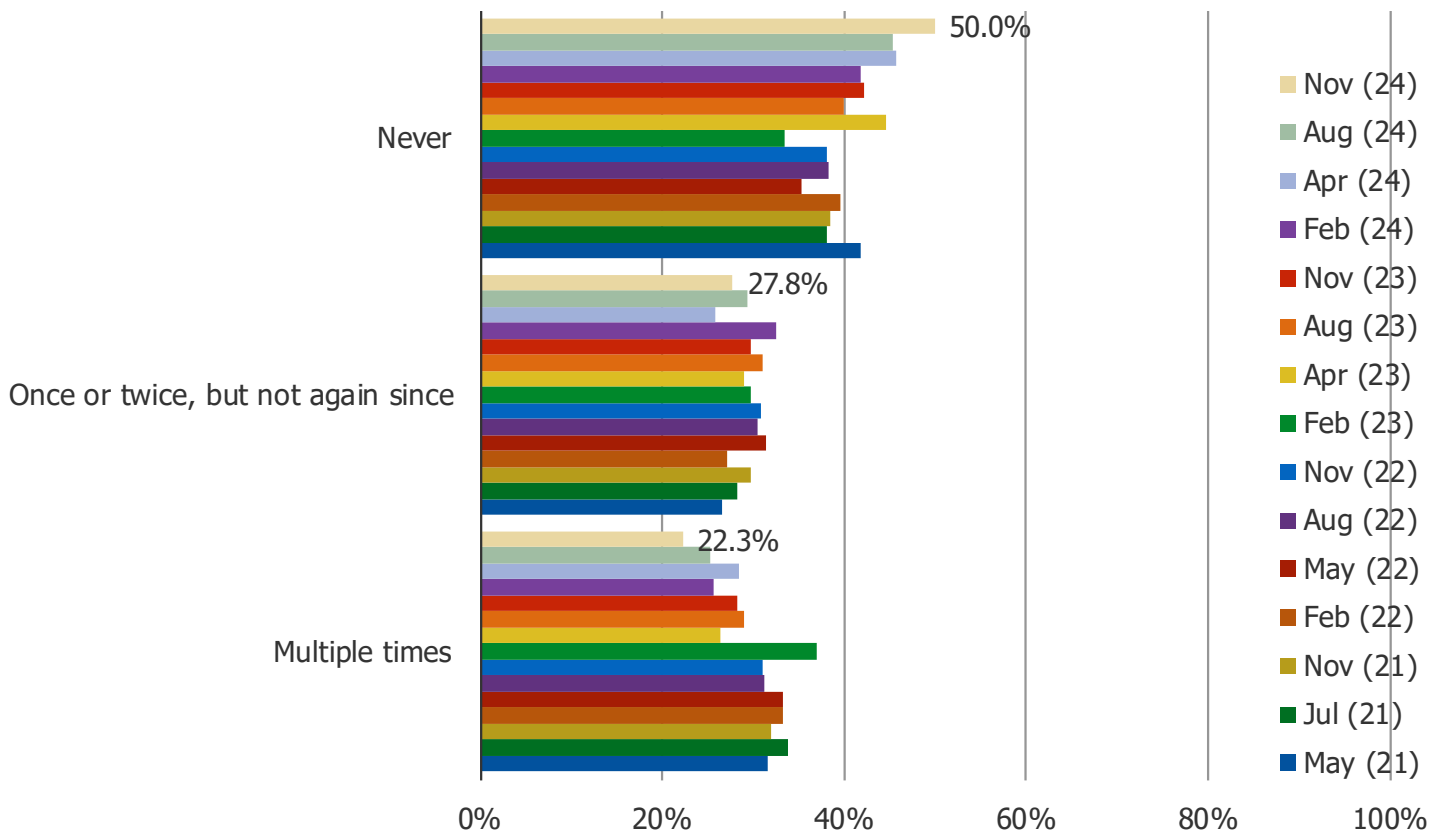
Posed to all respondents.



HARD SELTZER

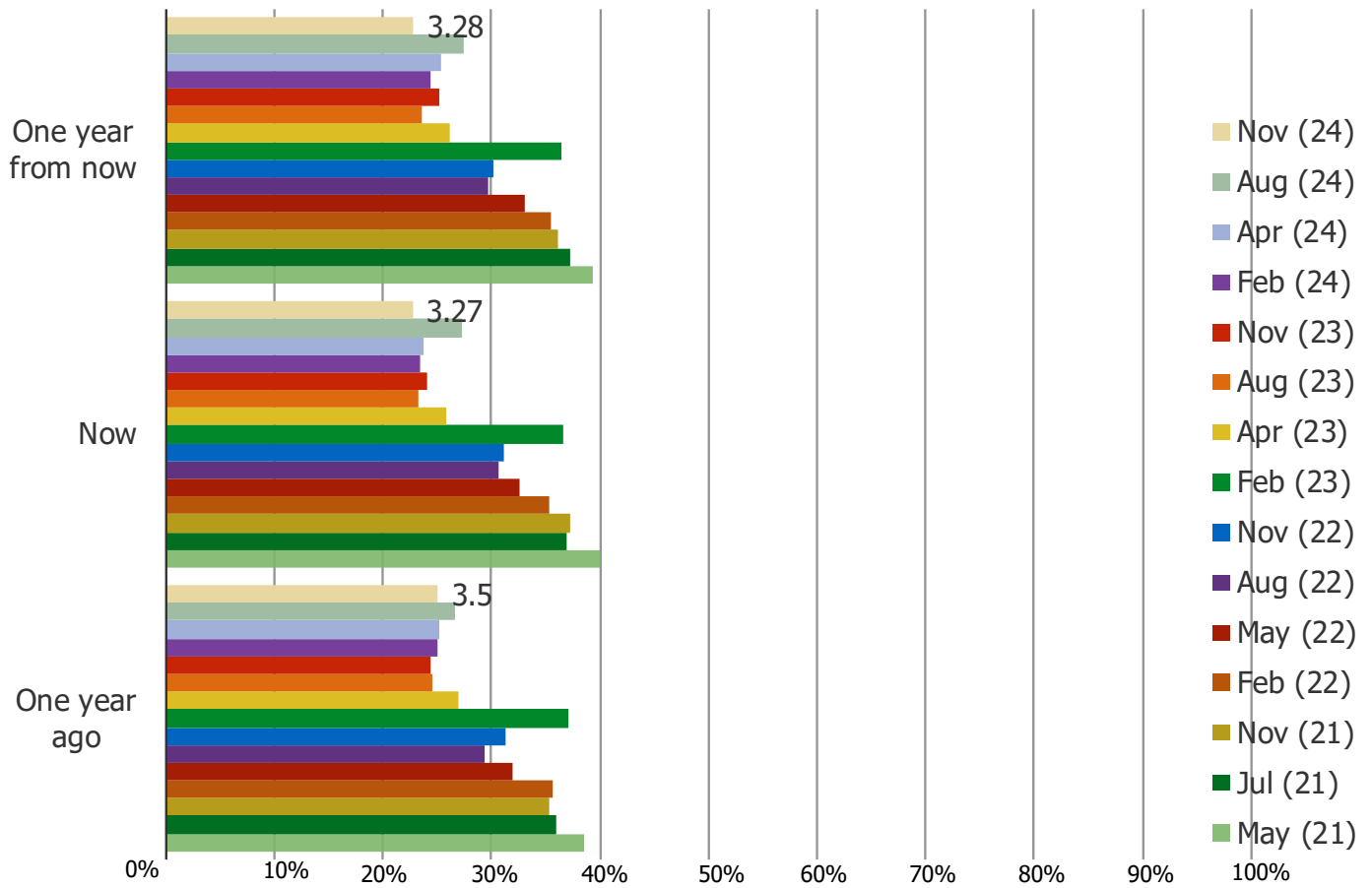
HAVE YOU EVER CONSUMED HARD SELTZER BEVERAGES? IE - CARBONATED WATER/SELTZER BEVERAGES WITH ALCOHOL IN IT.

Posed to all respondents.



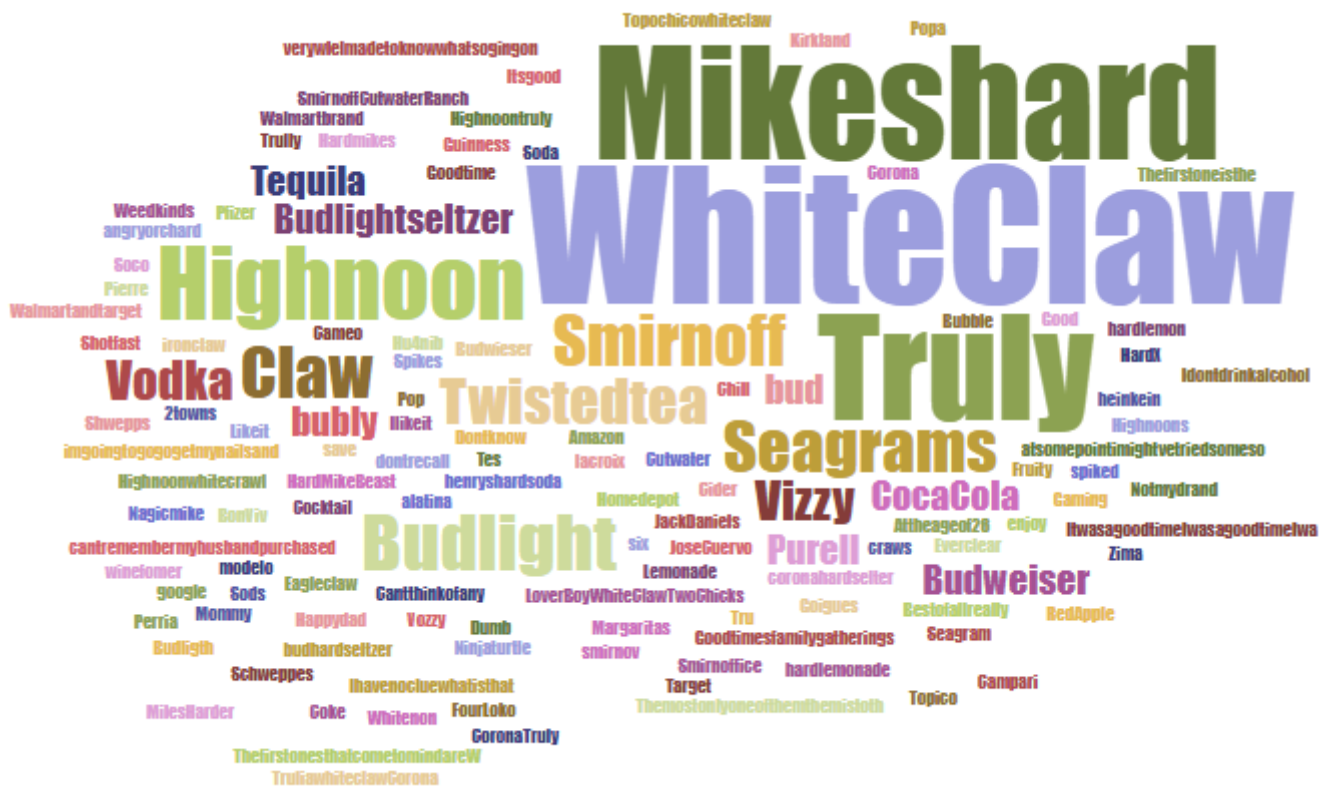
WHAT PERCENTAGE OF YOUR ALCOHOL CONSUMPTION WOULD YOU ESTIMATE GOES TO HARD SELZTER?

Posed to all respondents who have consumed hard seltzer (N = 501).



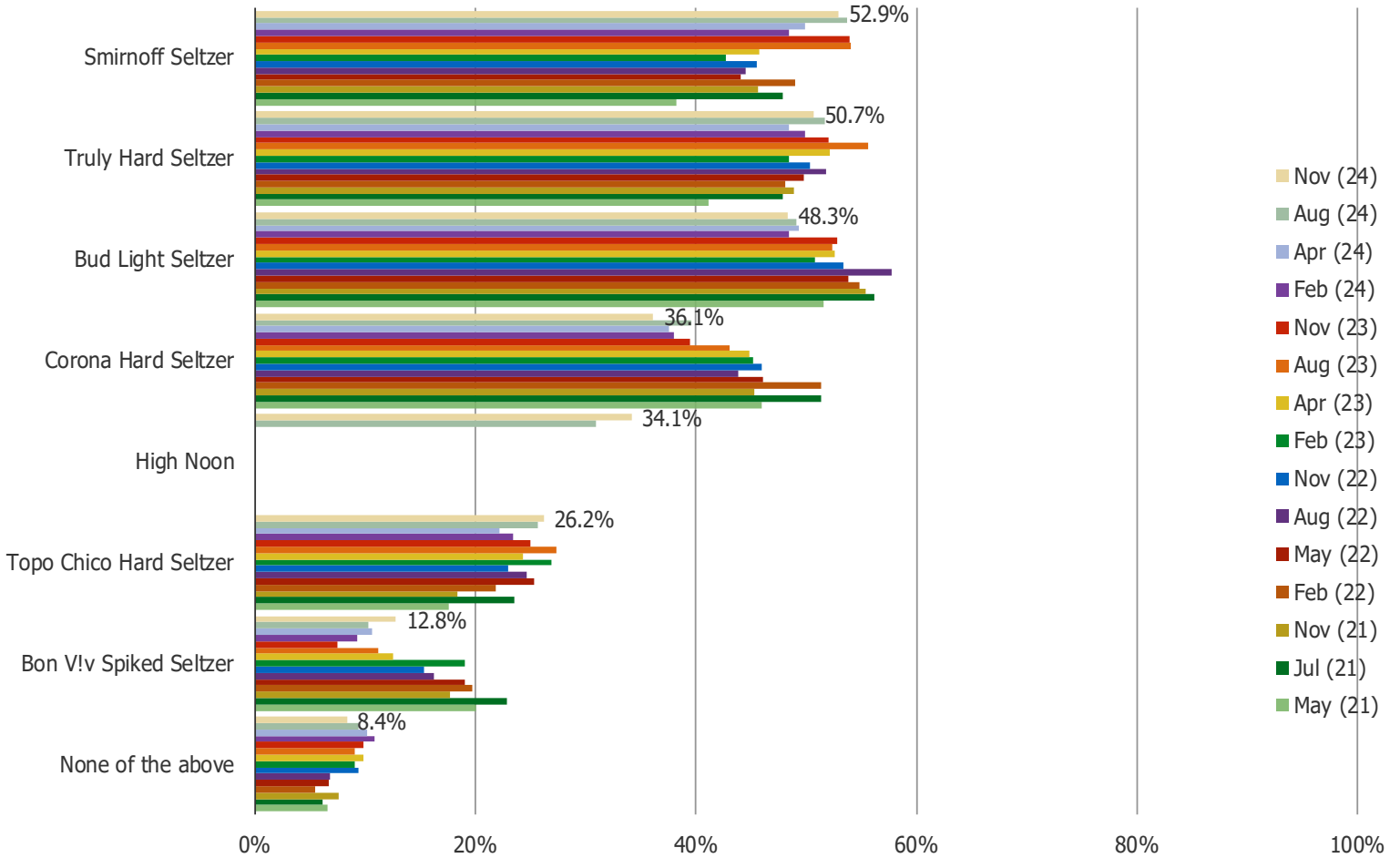
WHEN YOU THINK OF HARD SELTZER BRANDS, WHICH COMES TO MIND FIRST?

Posed to all respondents who have consumed hard seltzer (N = 501).



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

Posed to all respondents who have consumed hard seltzer (N = 501).



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 = 501).

