

November 2024

# **CPGs, Beer, and Hard Seltzer**

Volume 26 | Quarterly Survey 1,250 US Consumers Balanced To Census Tickers Covered: PG, SAM, BUD, STZ.

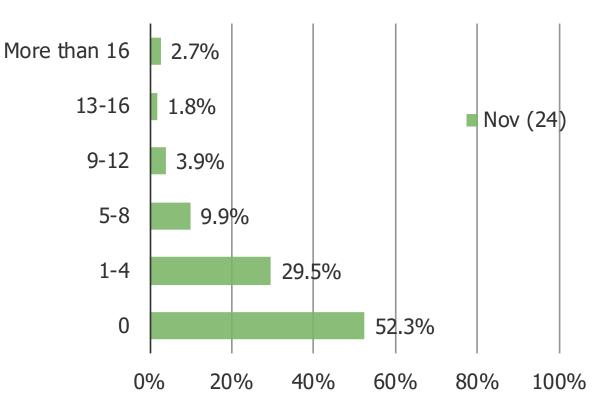
## Key Takeaways:

- □ 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 nonalcoholic beer has increased q/q.
- □ The share who have tried Athletic Brewing Company non-alcoholic beer has increased slightly sequentially.

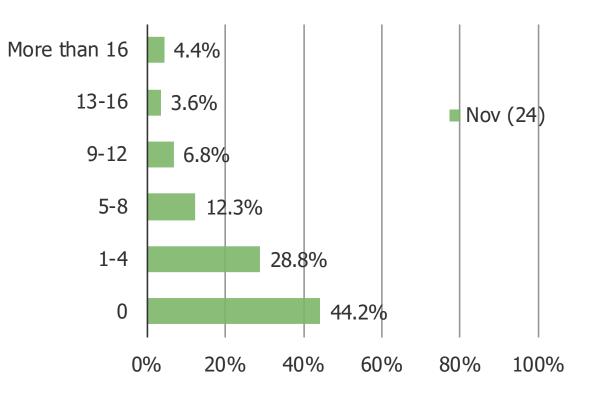
# **NEW QUESTIONS**

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ABOUT HOW MANY ALCOHOLIC DRINKS DO YOU HAVE EACH WEEK?

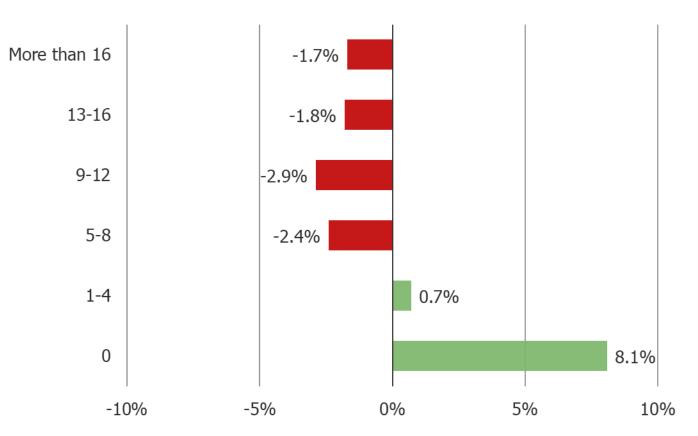


IF YOU WERE ASKED ONE YEAR AGO HOW MANY ALCOHOLIC DRINKS YOU DRINK EACH WEEK, WHAT WOULD YOU HAVE SAID?

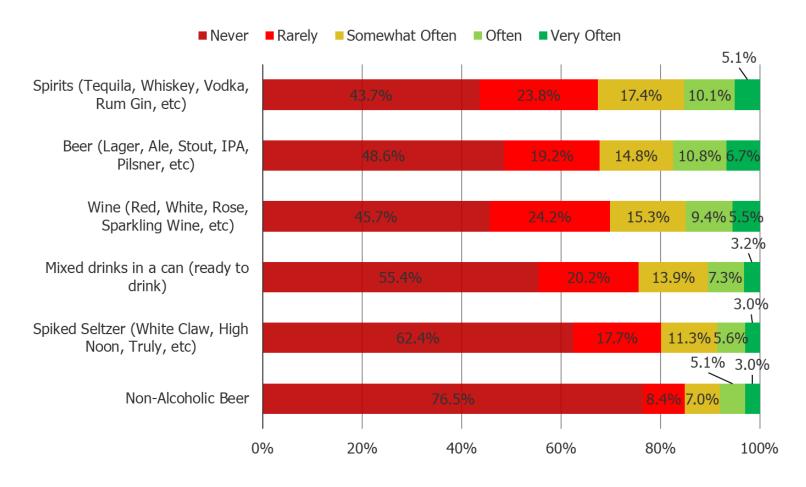


NOW (MINUS) IF WE ASKED ONE YEAR AGO ...





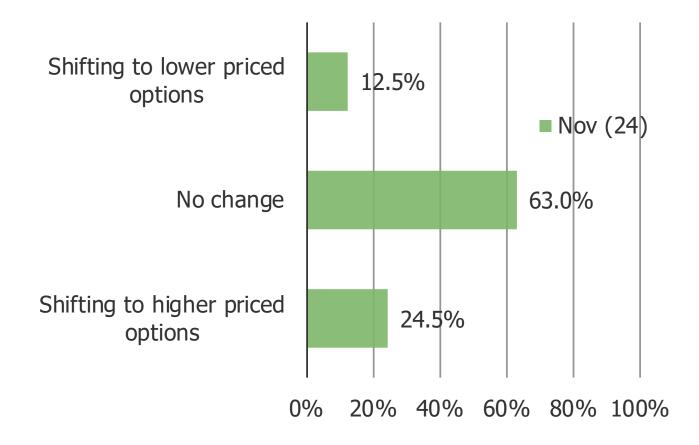
#### HOW OFTEN DO YOU DRINK THE FOLLOWING?



#### 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

Significantly Reduced	Slightly Reduced	No Change		Slightly Increased			Significantly Increased		
			8.2%						
	Non-Alcoholic Beer	· · · · · ·	4.3%	36.3%		<mark>5.6%4</mark> %		42.3%	
		11.2%							
Spiked Seltzer (White Claw, Higl	n Noon, Truly, etc)		6.6%	36.	5%	6.9%	<mark>5.0%</mark>	33.9%	
			∕~ 12.0%						
Mixed drinks in a c	an (ready to drink)		7.3%	36	.6%	8.3	3%4 <mark>.7%</mark>	31.2%	6
			12.2%						
Wine (Red, White, Rose, S	se, Sparkling Wine, etc)		9.2%		38.7%		9.0%4 <mark>.7</mark> %	6 26.3	3%
			14.1%						
Beer (Lager, Ale, Stou	t, IPA, Pilsner, etc)	,	7.6%	·	38.2%	,	7.7% <mark>5.3%</mark>	27.2	.%
			- 15.7%						
Spirits (Tequila, Whiskey, Vo	ey, Vodka, Rum Gin, etc)		9.8%		36.7%	b	8.8%5.3	3 <mark>%</mark> 23	.8%
									3.8%
	(	0% 10	% 20%	30%	40% 5	50% 60	% 70%	80%	90% 100%

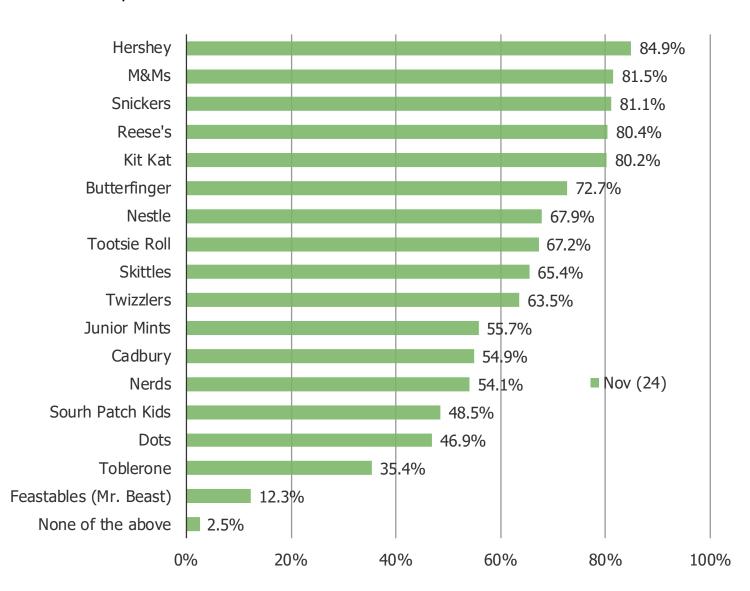
THINKING ABOUT THE PAST YEAR OR TWO, WOULD YOU SAY THE ALCOHOLIC BEVERAGE PRODUCTS YOU PURCHASE ARE...



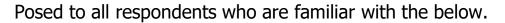
#### WHEN YOU THINK OF BUYING CHOCOLATE, WHAT BRAND COMES TO MIND FIRST?

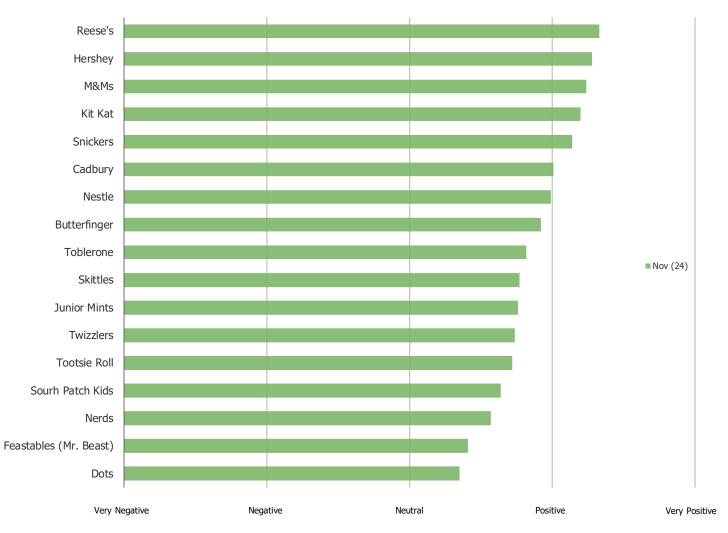


#### WHICH OF THE FOLLOWING BRANDS ARE YOU FAMILIAR WITH? SELECT ALL THAT APPLY

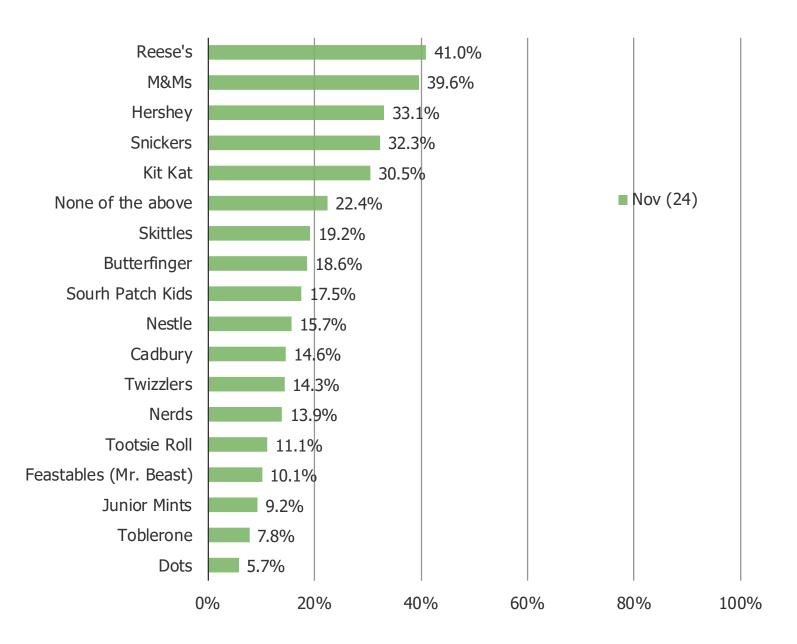


#### WHAT IS YOUR OPINION OF THE FOLLOWING BRANDS?

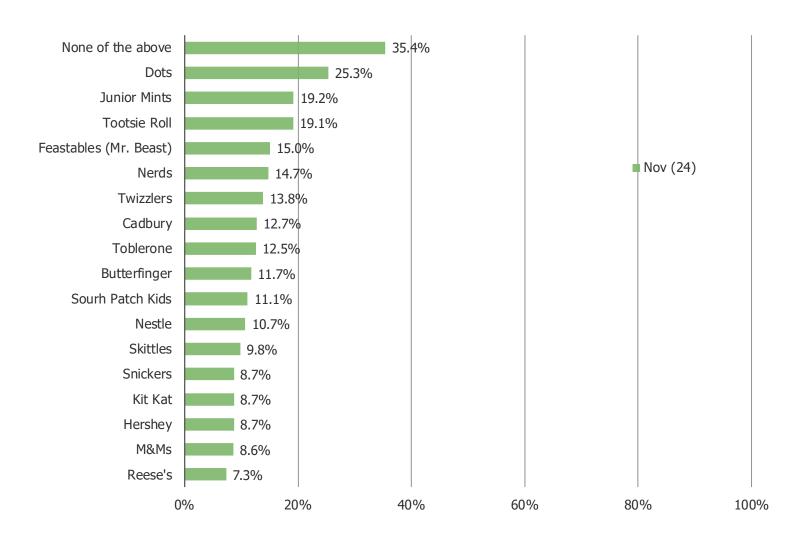




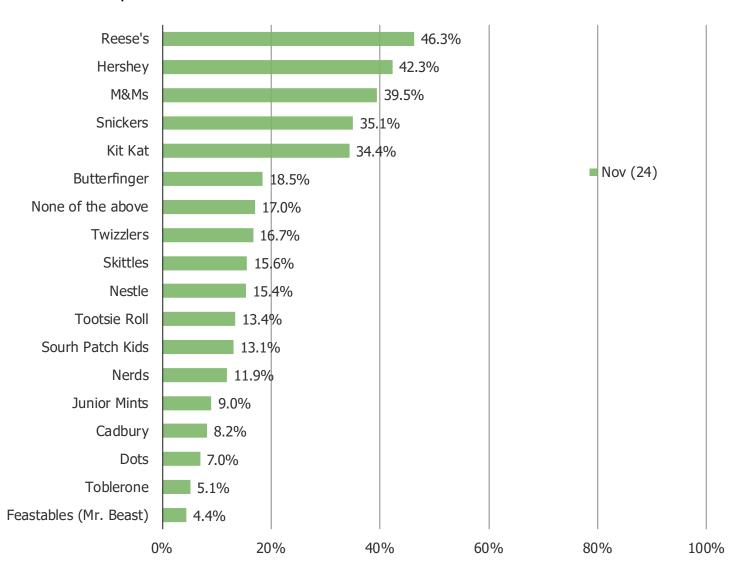
# IN YOUR OPINION, WHICH OF THE FOLLOWING BRANDS ARE GAINING POPULARITY? SELECT ALL THAT APPLY



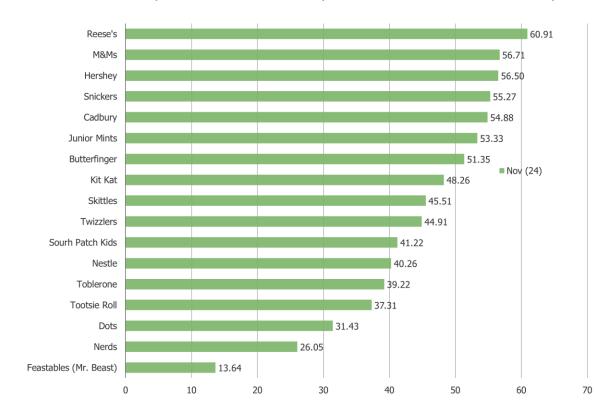
IN YOUR OPINION, WHICH OF THE FOLLOWING BRANDS ARE LOSING POPULARITY? SELECT ALL THAT APPLY



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



#### 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.

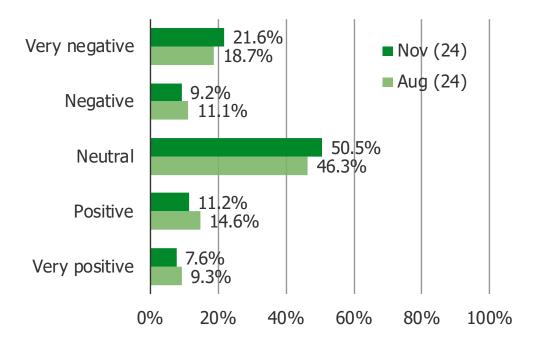
	N=
Feastables (Mr. Beast)	44
Hershey	423
Reese's	463
Kit Kat	344
Twizzlers	167
Cadbury	82
Toblerone	51
Sourh Patch Kids	131
Nerds	119
Butterfinger	185
Nestle	154
Tootsie Roll	134
Junior Mints	90
Dots	70
M&Ms	395
Snickers	351
Skittles	156

# NON-ALCOHOLIC BEER

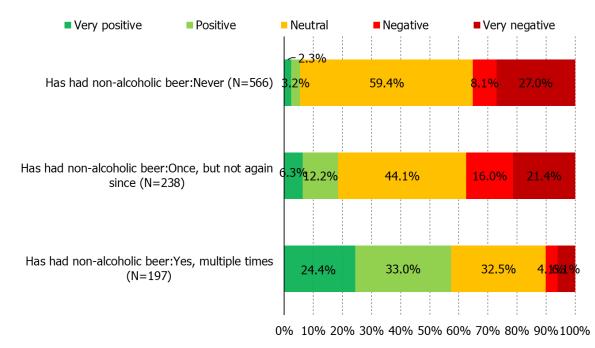
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#### WHAT IS YOUR OPINION OF NON-ALCOHOLIC BEER?

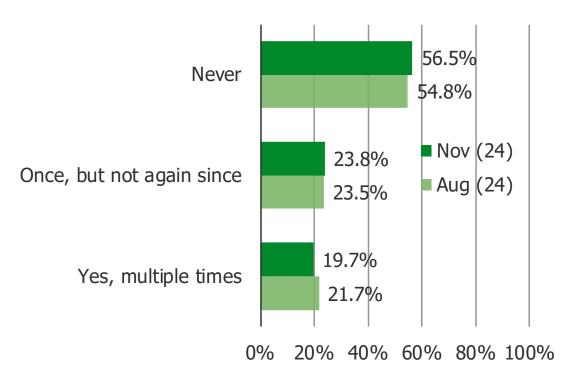
Posed to all respondents



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

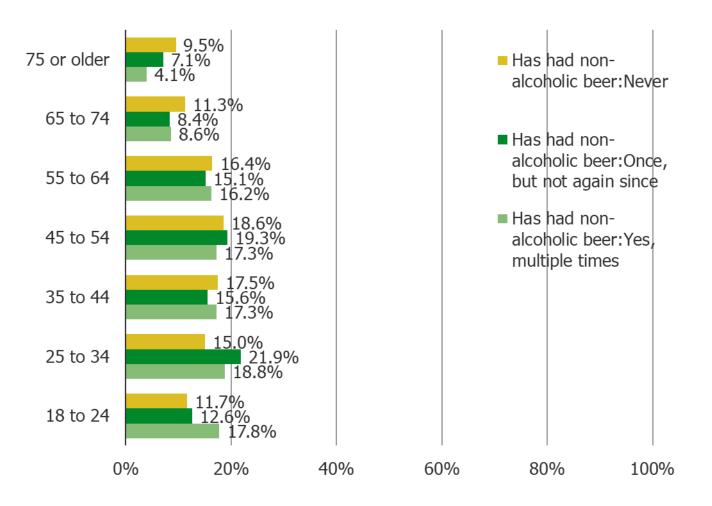


#### HAVE YOU EVER CONSUMED NON-ALCOHOLIC BEER?



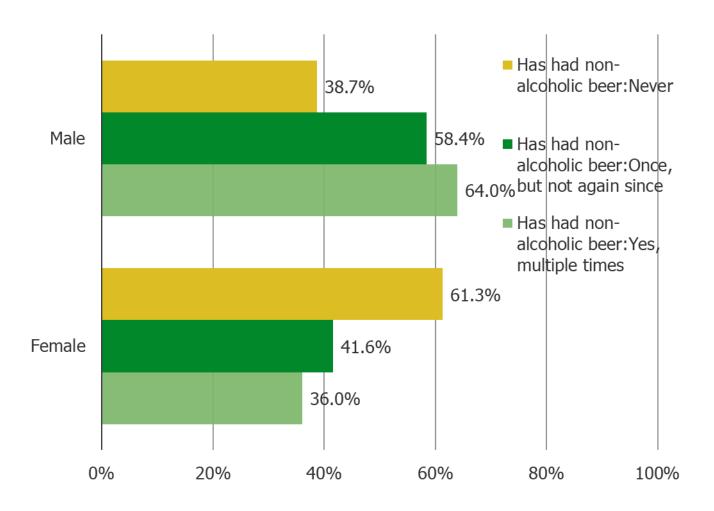
#### WHO IS THE CUSTOMER? EXPERIENCE WITH NON-ALCOHOLIC BEER

#### Age:

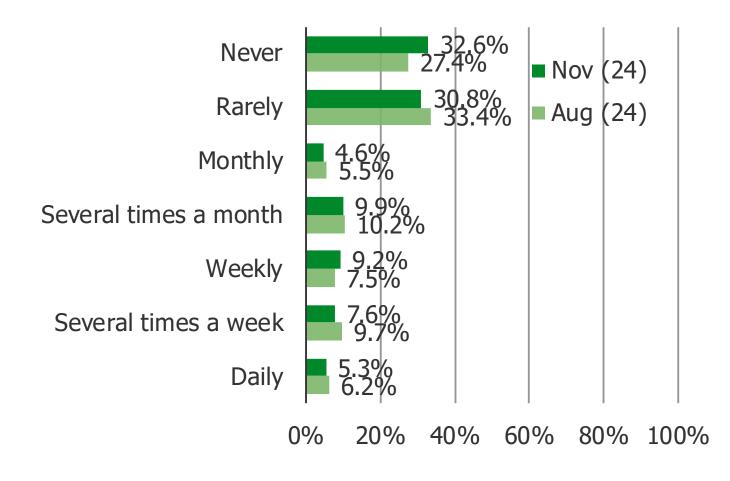


#### WHO IS THE CUSTOMER? EXPERIENCE WITH NON-ALCOHOLIC BEER

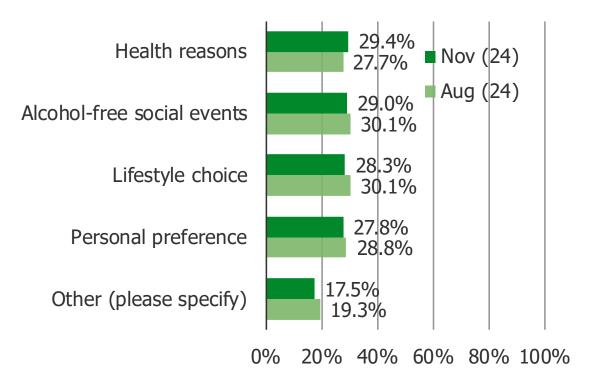
Gender:



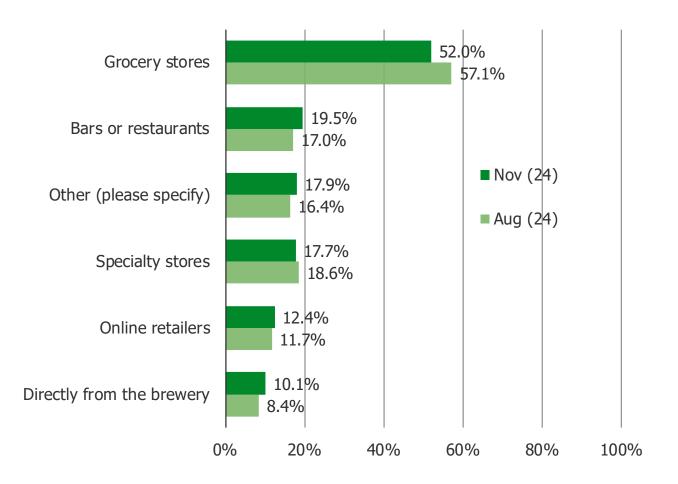
#### HOW OFTEN DO YOU CONSUME NON-ALCOHOLIC BEER?



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

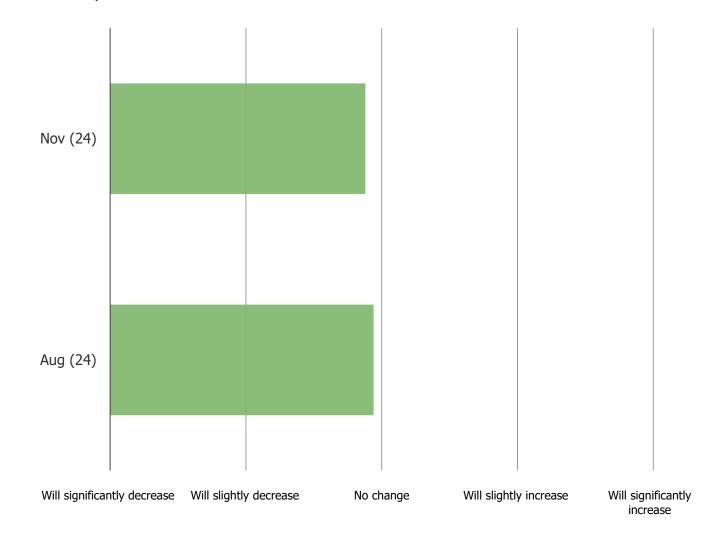


#### WHERE DO YOU TYPICALLY PURCHASE NON-ALCOHOLIC BEER? (SELECT ALL THAT APPLY)

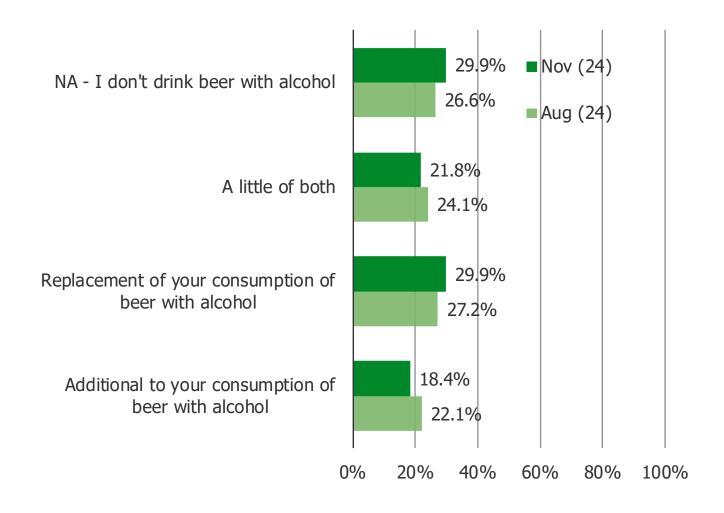


## BESPOKE Surveys CPGs | November 2024

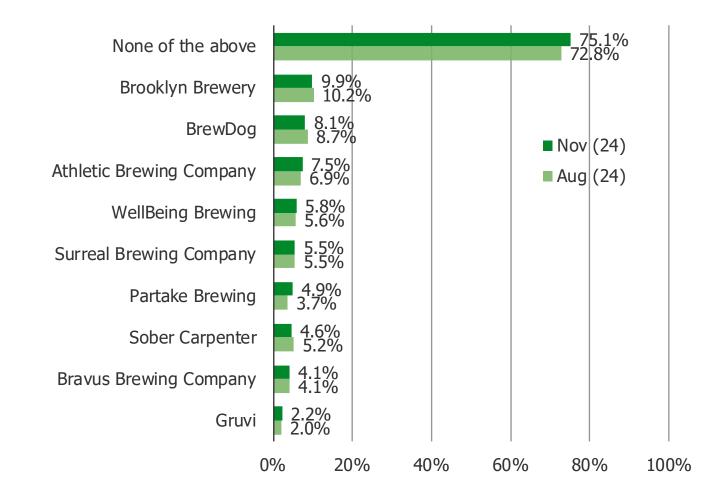
DO YOU EXPECT TO CHANGE HOW OFTEN YOU DRINK NON-ALCOHOLIC BEER IN THE FUTURE?



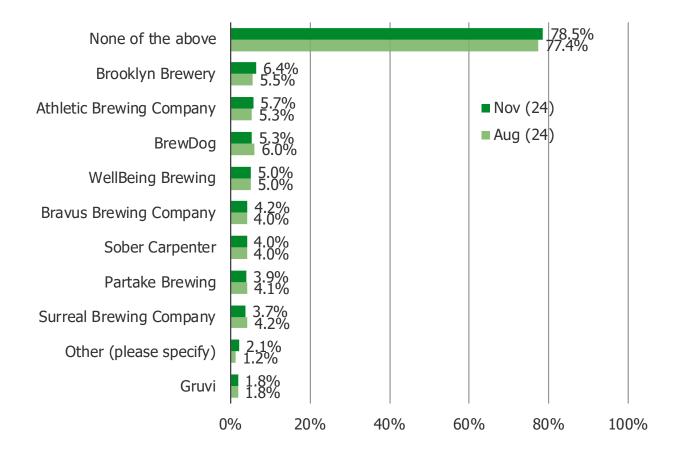
#### IS YOUR CONSUMPTION OF NON-ALCOHOLIC BEER...



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

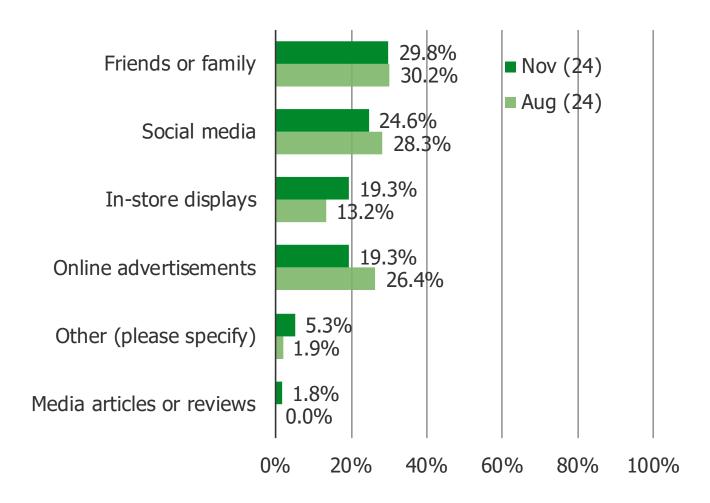


# HAVE YOU EVER TRIED ANY OF THE FOLLOWING NON-ALCOHOLIC BEER BRANDS? SELECT ALL THAT APPLY



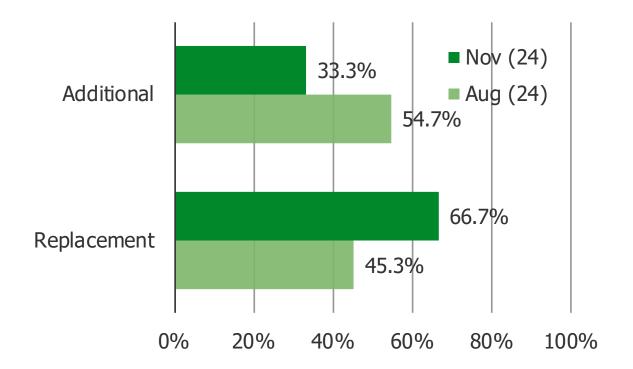
#### HOW DID YOU FIRST LEARN ABOUT ATHLETIC BREWING COMPANY?

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



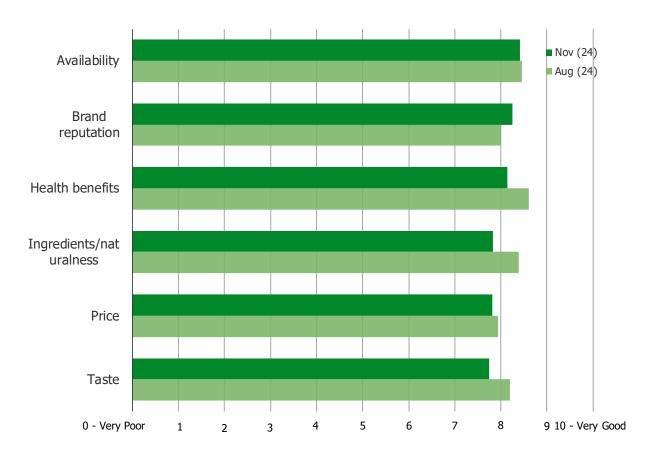
# DO YOU VIEW YOUR CONSUMPTION OF ATHLETIC BREWING TO BE ADDITIONAL OR REPLACEMENT OF REGULAR BEER CONSUMPTION?

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



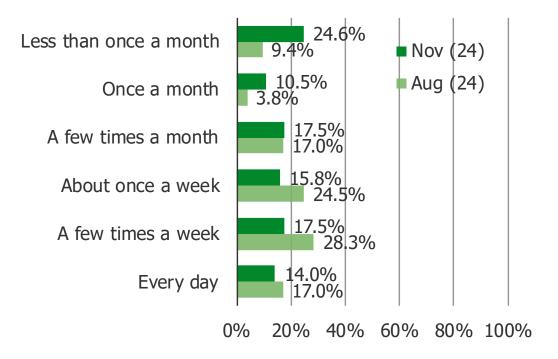
#### HOW WOULD YOU RATE ATHLETIC BREWING WHEN IT COMES TO ...



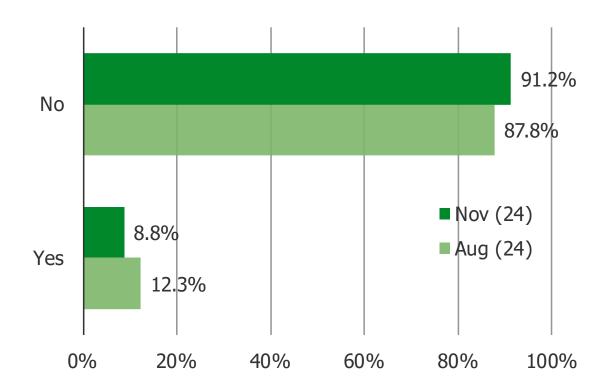


#### HOW OFTEN DO YOU DRINK ATHLETIC BREWING PRODUCTS?

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?



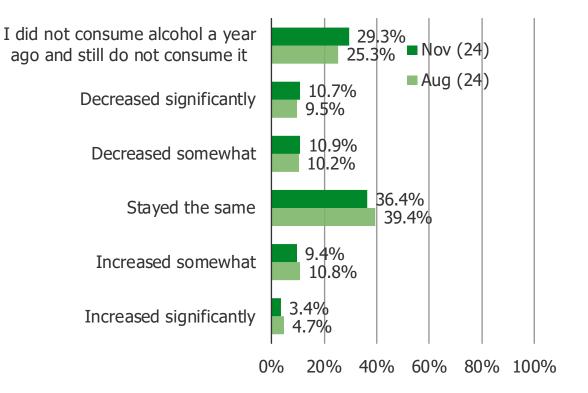
#### HOW OFTEN DO YOU CONSUME ALCOHOLIC BEVERAGES?

## Posed to all respondents

Respondents	3	5.2%		20	.2%	1	8.5%	16.8%	9.4	%
Male	42.6%	43.1	L%	49.2%	b l	54.8	3%	6	8.1%	
Female	57.4%	12 10/	56.	9%	5 50/	50.8%		45.2%	31.9%	
		13.1%			<u> </u>					
75 or older	11 10/			10.4%		2.2%	7.7%		5.3%	
	11.1%			10.4%						
65 to 74	<b></b> 16.	.5%	1			10.8%	1	9.5%	5.3%	ò
55 to 64	- 16.2	2%	15.4%		16.8%	<b>)</b>	16.1%		14.9%	
45 to 54		19.8	3%	15.19	<mark>%</mark>	19.1%		29.	8%	
	/		22.00/		15 10/		10.00		10.00/	
35 to 44	<u> </u>		22.8%		15.1%		19.6%		13.8%	
25 to 34		19.3	20/		23.2%		14.3%		22.3%	
	<u> </u>	19.3	570		23.2%		14.5%		22.3%	
18 to 24			6.9%		16.8%		13	.7%	8.5%	
			0.970		10.070		:	.7 70	0.570	

■ 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)

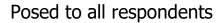
#### COMPARED TO ONE YEAR AGO, HOW HAS YOUR ALCOHOL CONSUMPTION CHANGED?

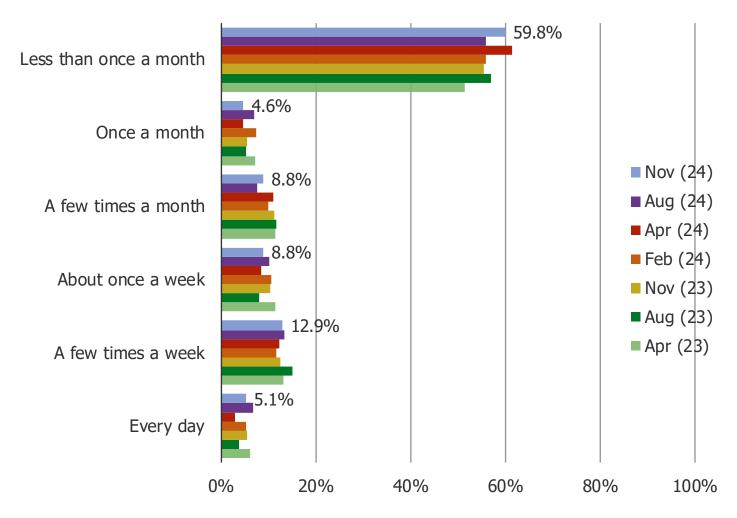


BEER

# BESPOKE Surveys CPGs | November 2024

#### HOW OFTEN DO YOU DRINK BEER?





#### HOW OFTEN DO YOU DRINK BEER?

Posed to all respondents

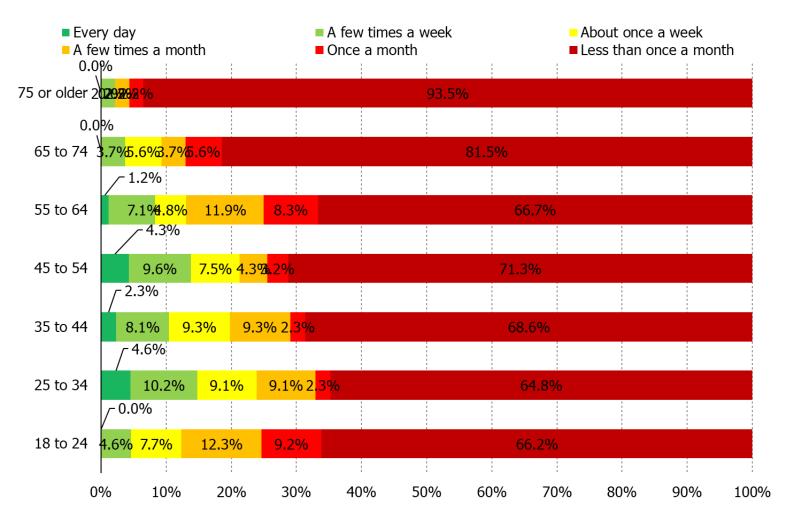
## Cross-Tabs: Male, by Age.

<ul> <li>Every day</li> <li>A few times a month 0.0%</li> </ul>			<ul><li>A few times a week</li><li>Once a month</li></ul>					<ul> <li>About once a week</li> <li>Less than once a month</li> </ul>			
75 or older	6.1%	12.1%0.0 <mark>6</mark>	<mark>%1%</mark>				75.8%				
4	.3%										
65 to 74		21.3%		12.8%	6.4% <mark>4.</mark> 3	<mark>3%</mark>		51.1	.%		
	<u>6.</u> !	5%									
55 to 64		11.7%	15.6%	2	13.0% 3	<mark>3.9%</mark>		49	.4%		
		- 15.4%									
45 to 54			20.9%	»	13.2%	6.6%	<mark>5.5%</mark>		38.5%		
	<u> </u>	%									
35 to 44		17.9%	6.0%	o 15.	.5% 2 <mark>.</mark> 4	%		52.4	%		
	<sup>10</sup>	0.5%									
25 to 34	i to 34		25.6%		9.3%	11.6%	8.1%		34.9%		
	7.6	6%									
18 to 24	22.7%		7%	% <mark>9.1%</mark>		7.6%1. <mark>5</mark> %			51.5%		
0¢	% 1	.0% 20	0% 3	80%	40%	50%	60%	70%	80%	90%	100%

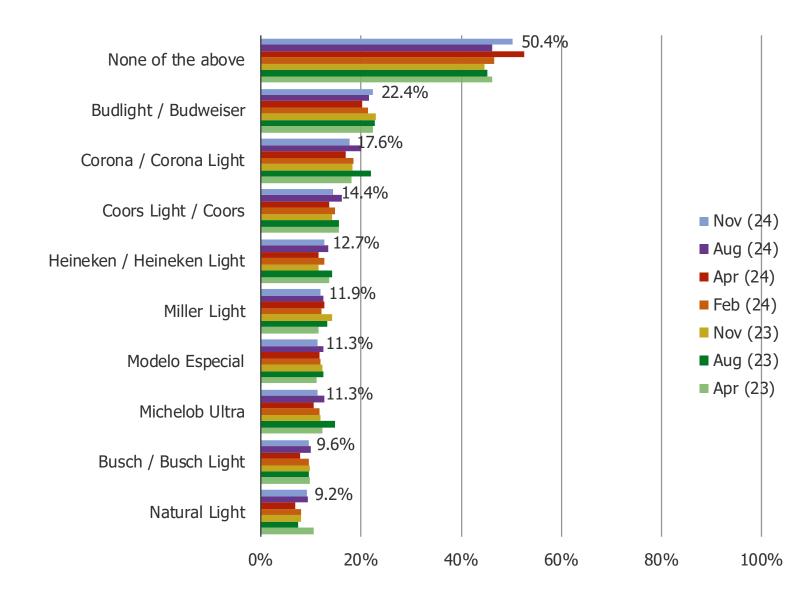
#### HOW OFTEN DO YOU DRINK BEER?

## Posed to all respondents

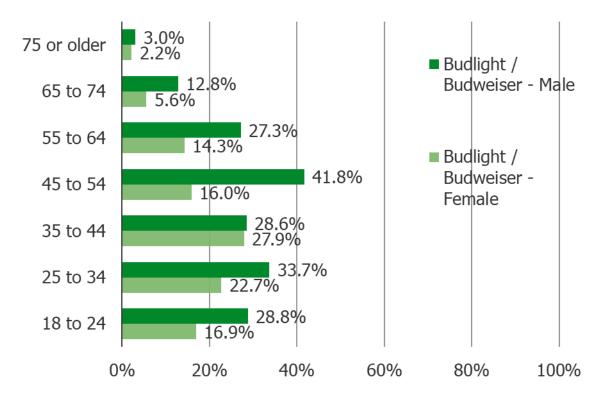
## Cross-Tabs: Female, by Age.



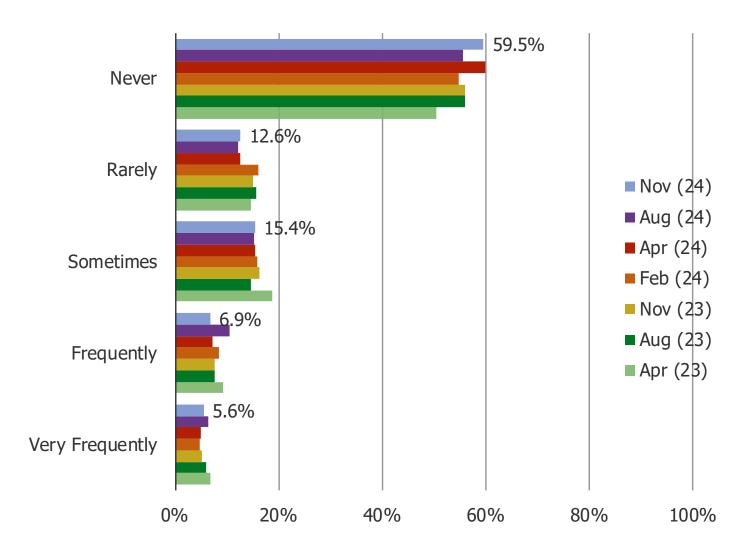
#### HAVE YOU PURCHASED BEER FROM ANY OF THE FOLLOWING IN THE PAST YEAR?



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



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



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

## Posed to all respondents

## Cross-Tabs: Male, by Age.

Very Frequently			Freque	ntly	Some	times	Rare	Rarely		
75 or older0.3	0.999/0				97.0%	b				
65 to 7402	<b>12.</b> 8%	o 1	.9.2%			6	6.0%			
55 to 64	9.1% 3 <mark>.</mark> 9	9% 15.6°	% 	16.9%		·	54.6%	)		
45 to 54	12.1%	11.0%	15.4%	6 j	17.6%		:	4.0%		
35 to 44	7.1% 9.	5%	21.4%	10.	7%		51.2	%		
25 to 34	10.5%	14.0%		27.9%		12.8%		34.9%		
201001	10.570	11.070		27.370		12.070				
19 to 24	12.00	10.00		24.20/	4 6 0					
18 to 24	13.6%	10.6%		24.2%	<mark>4.6%</mark>		47	.0%	i i i i i i i i i i i i i i i i i i i	
0'	% 10%	% 20%	30%	40%	50%	60%	70%	80%	90%	100%

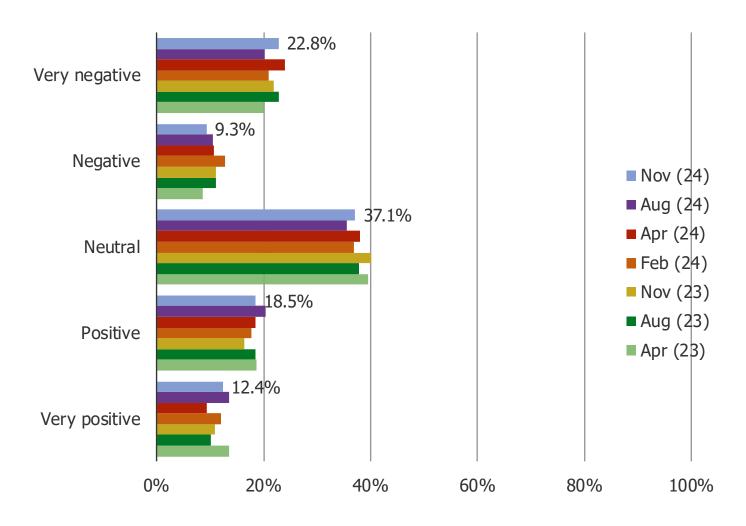
OVER THE COURSE OF THE PAST YEAR, HOW OFTEN DID YOU PURCHASE BUD LIGHT / BUDWEISER?

## Posed to all respondents

## Cross-Tabs: Female, by Age.

Very Frequently	Freque	ently	Someti	mes	Rarely	,	Never				
75 or older02026% 10.9%			87	7.0%							
65 to 74 109999% 11.1%			8	5.2%							
55 to 64). <mark>998% 15.5%</mark>	10.7%			69.	.1%						
45 to 54 <mark>4.3%</mark> 4.3% 14.9	% 7.5%			69.2%							
35 to 44 <b>4.7%</b> 7.0% <mark>4.7%</mark>	18.6%	65.1%									
25 to 34 3 <mark>.4%</mark> 11.4%	17.1%	14.8%		-	53.4%		,				
18 to 24 3 <mark>.1%</mark> .6%	24.6%	13.9%			53.9%	ľ	l l				
0% 10%	20% 30%	40%	50%	60%	70%	80%	90%	100%			

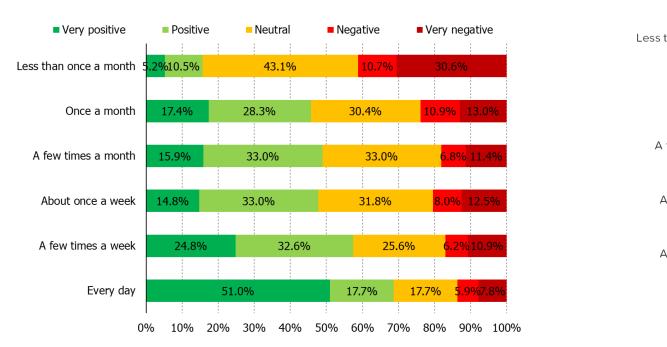
WHAT IS YOUR OPINION OF BUD LIGHT / BUDWEISER?



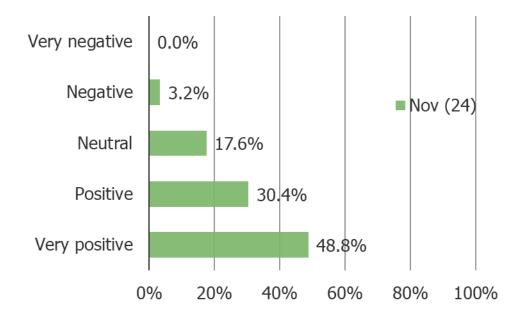
#### WHAT IS YOUR OPINION OF BUD LIGHT / BUDWEISER?

## Posed to all respondents

## Cross-Tab: By how often respondents drink beer



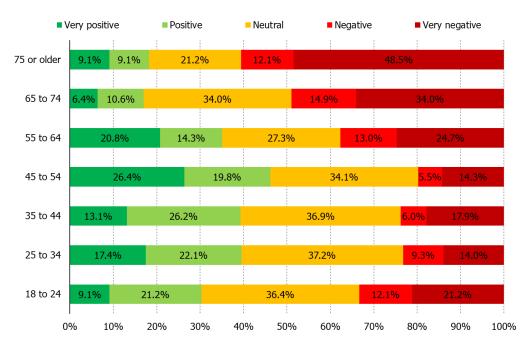
Filter: In the past year purchased Bud Light frequently or very frequently.



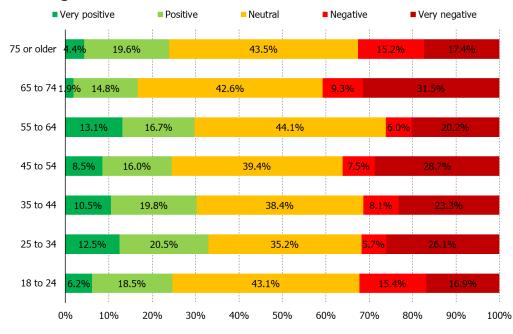
#### WHAT IS YOUR OPINION OF BUD LIGHT / BUDWEISER?

## Posed to all respondents

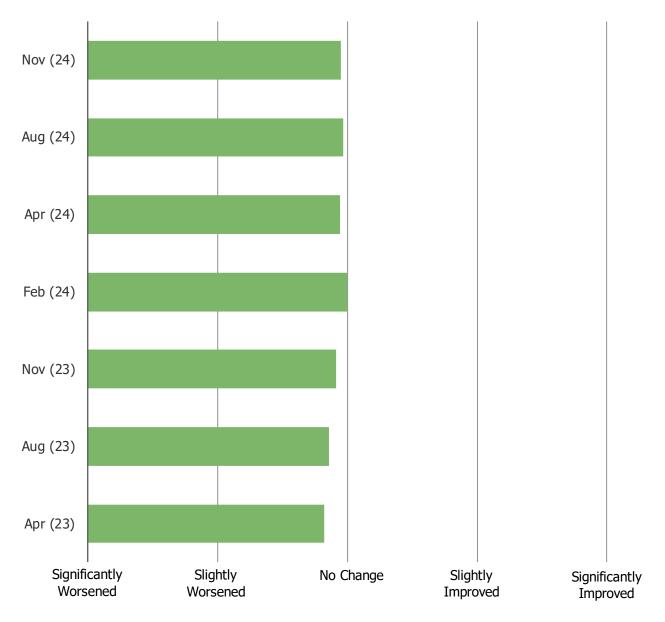
### Cross-Tab: Male and age



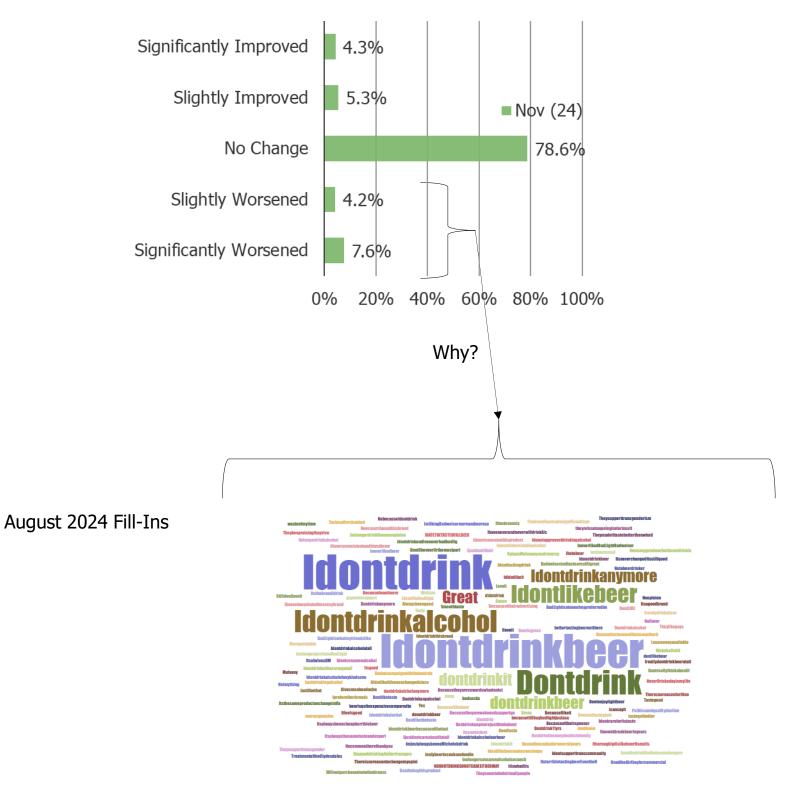
#### Cross-Tab: Female and age



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



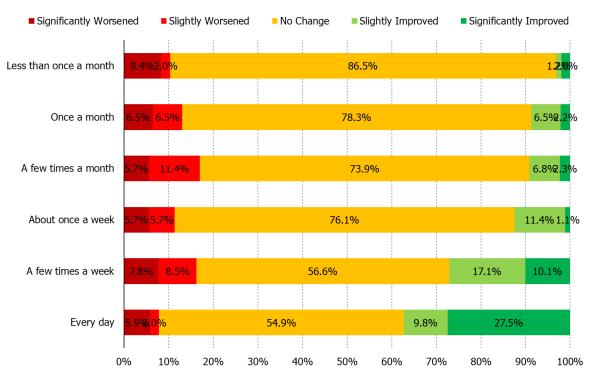
#### HAS YOUR OPINION OF BUD LIGHT / BUDWEISER CHANGED IN THE PAST MONTH?



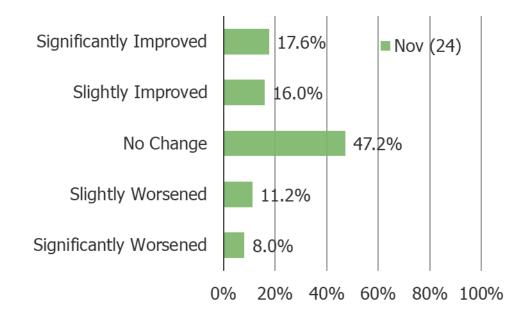
HAS YOUR OPINION OF BUD LIGHT / BUDWEISER CHANGED IN THE PAST MONTH?

## Posed to all respondents

## Cross-Tab: By how often respondents drink beer



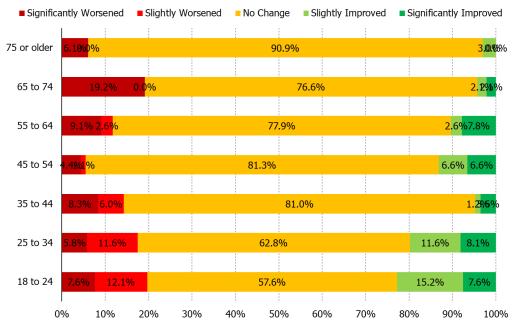
Filter: In the past year purchased Bud Light frequently or very frequently.



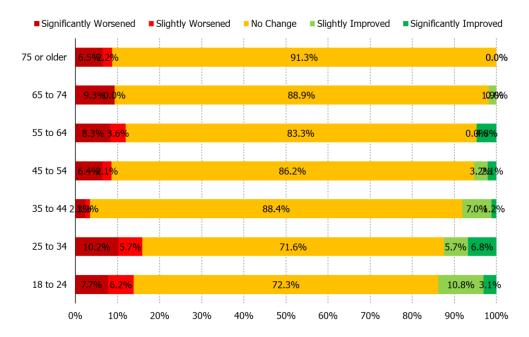
#### HAS YOUR OPINION OF BUD LIGHT / BUDWEISER CHANGED IN THE PAST MONTH?

### Posed to all respondents

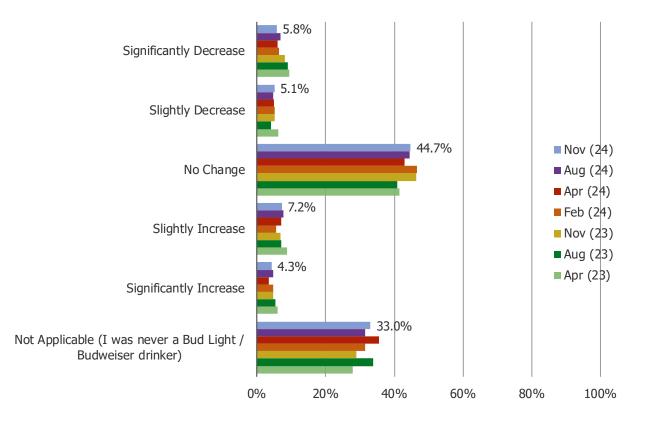
## Cross-Tab: Male and age



### Cross-Tab: Female and age



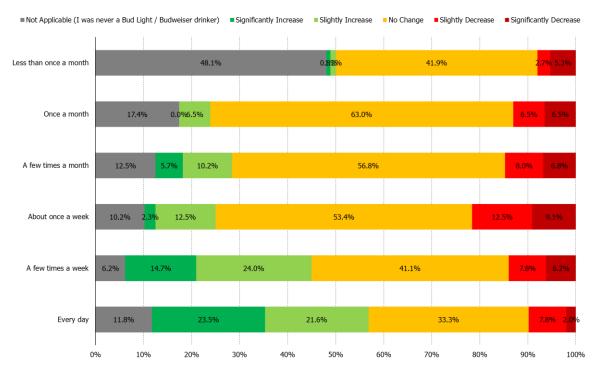
DOING FORWARD, WILL YOU WILL INCREASE OR DECREASE YOUR PURCHASING OF BUD LIGHT / BUDWEISER?



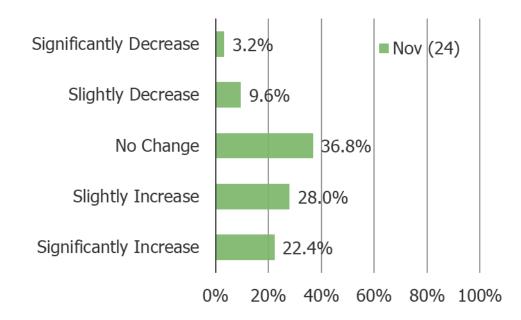
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## Posed to all respondents

## Cross-Tab: By how often respondents drink beer



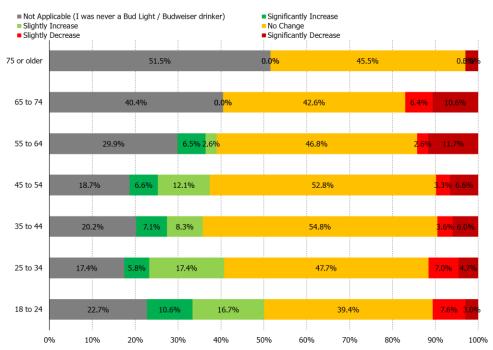
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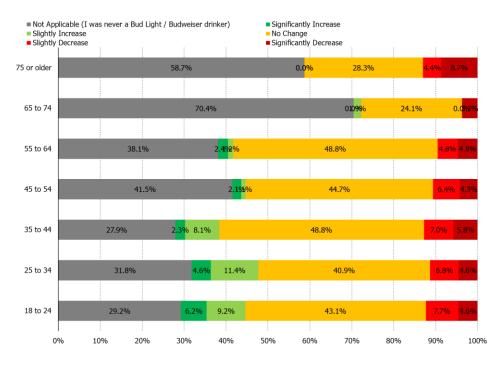
GOING FORWARD, WILL YOU WILL INCREASE OR DECREASE YOUR PURCHASING OF BUD LIGHT / BUDWEISER?

### 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?

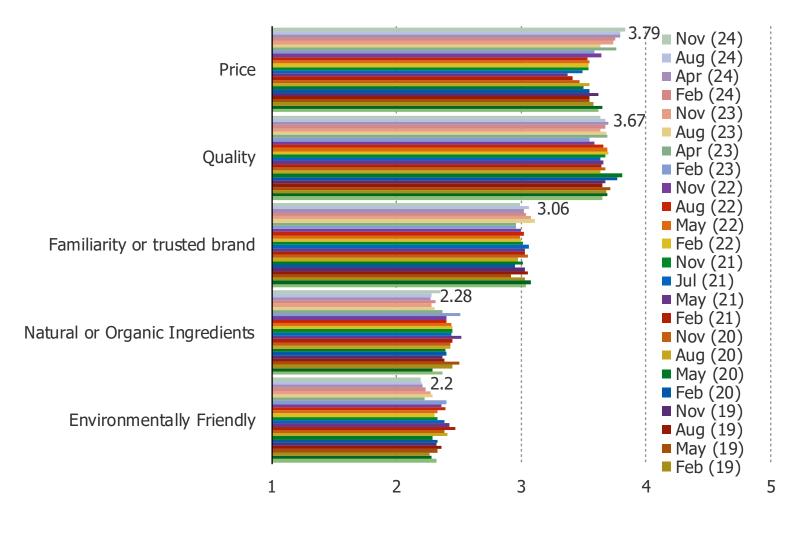
Posed to all respondents who would decrease purchases of Bud Light/Budweiser.



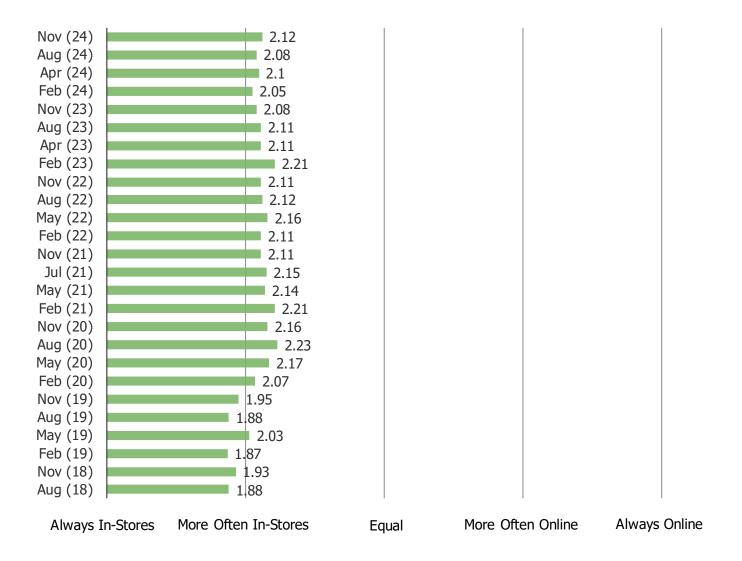
## **CPGS OVERALL**

FOR PERSONAL USE ONLY-DO NOT FORWARD OR REDISTRIBUTE

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

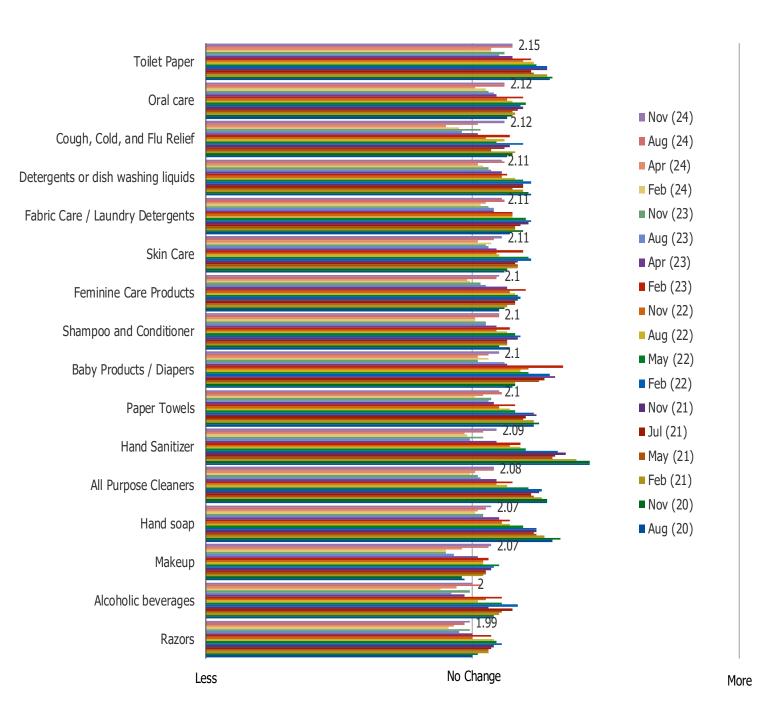


#### WHERE DO YOU BUY HOUSEHOLD AND PERSONAL CARE ITEMS?

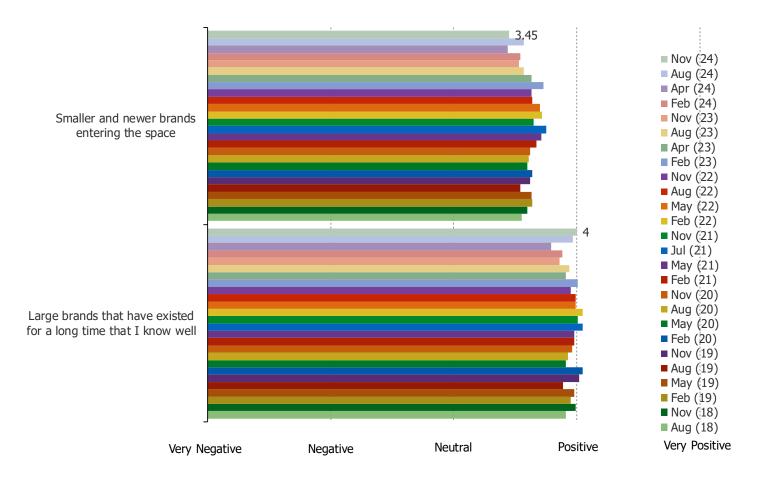


# GOING FORWARD, DO YOU EXPECT TO SPEND MORE OR LESS THAN NORMAL ON THE FOLLOWING PRODUCTS?

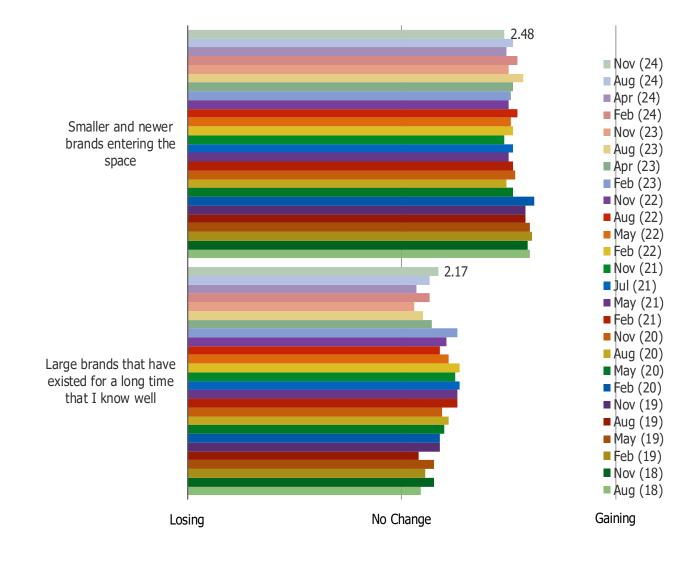
Posed to respondents who regularly or occasionally make purchase decisions on each.



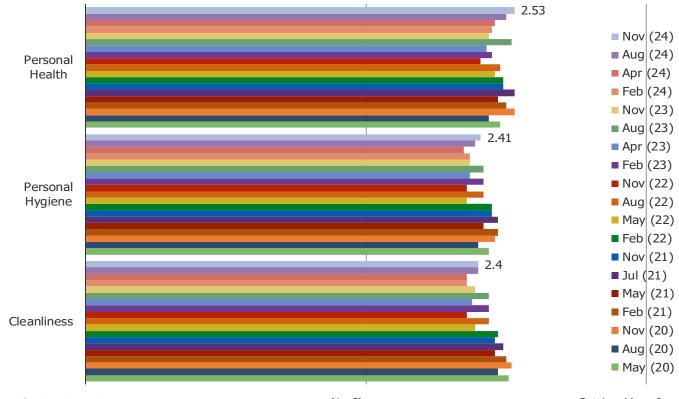
## WHEN IT COMES TO HOUSEHOLD AND PERSONAL CARE PRODUCTS, WHAT IS YOUR OPINION OF THE FOLLOWING?



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



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



## Posed to all respondents.

Getting Less Important

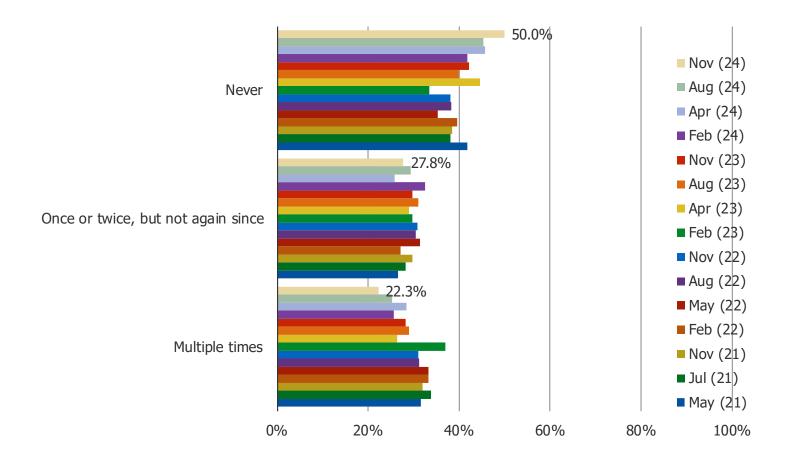
No Change

Getting More Important

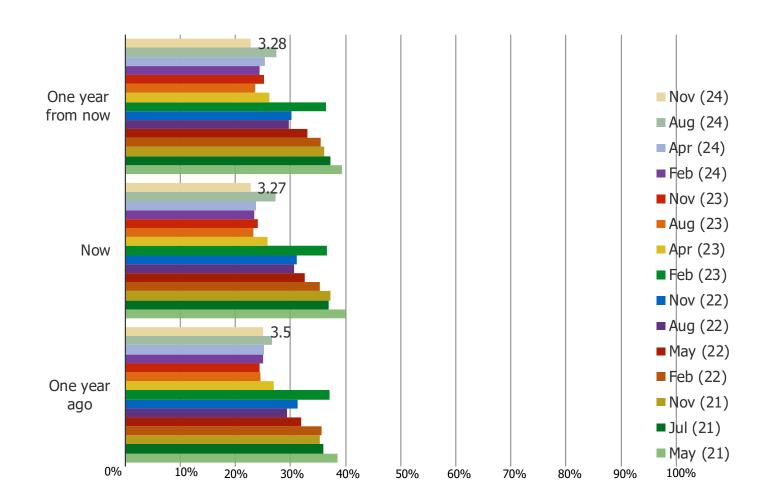
## HARD SELTZER

FOR PERSONAL USE ONLY-DO NOT FORWARD OR REDISTRIBUTE

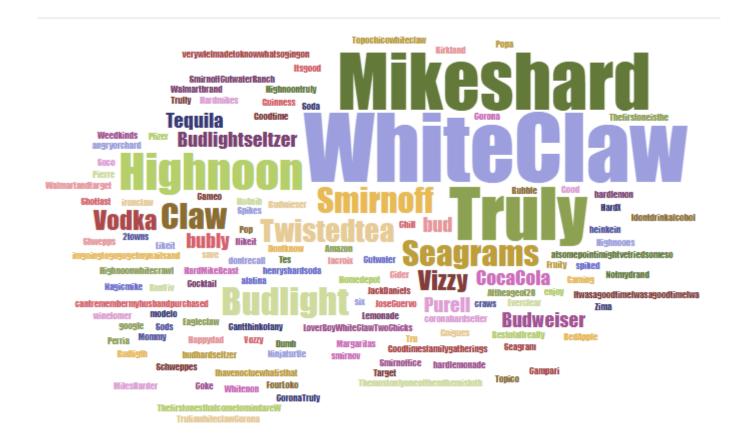
## HAVE YOU EVER CONSUMED HARD SELTZER BEVERAGES? IE - CARBONATED WATER/SELTZER BEVERAGES WITH ALCOHOL IN IT.



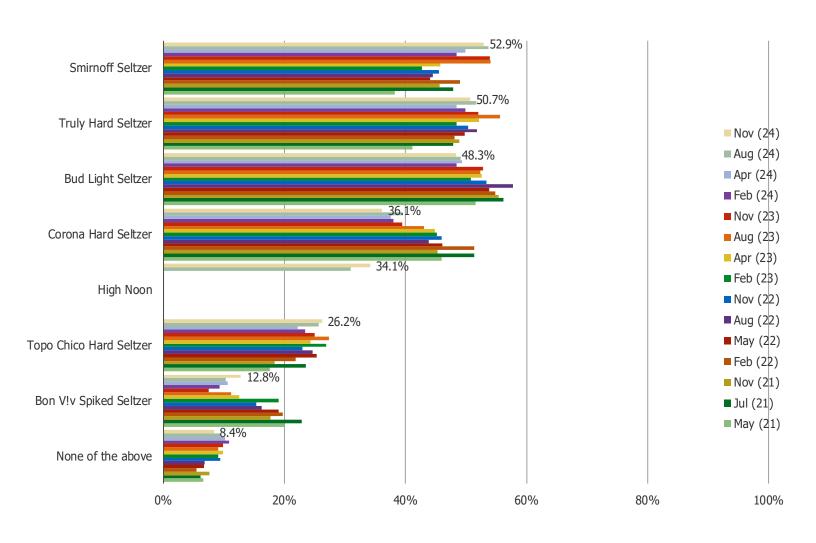
# WHAT PERCENTAGE OF YOUR ALCOHOL CONSUMPTION WOULD YOU ESTIMATE GOES TO HARD SELZTER?



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



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



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

