BACi Consumer Study

Summary of Findings

August 2024

PATH TO PURCHASE INSTITUTE

BACi

Research Methodology

P2PI fielded an online survey between
July 26 - August 5, 2024

Sample consists of *n=1,250* consumers in the United States aged 21-70 who purchased at least one of: beer, wine, hard seltzer, or liquor / ready-to-drink cocktails in the **past month** .

n=313 beer respondents
n=312 wine respondents
n=312 liquor / RTD cocktail respondents
n=313 hard seltzer respondents *(note: mentions of "seltzer" throughout the report are in reference to "hard seltzer")*

A weighting scheme was applied to the data; it is balanced to reflect the age and gender composition of adults in the United States.

Notes on Interpretation

Due to rounding, some percentages may total to 99% or 101%

Statistical significance testing* is noted throughout the report as follows:

2023: 22% — Statistically significantly higher or lower vs. 2023 results at the 95% confidence level

Sample size should be interpreted directionally and with caution where *n<100* is noted in the slide footnotes.

**Please note: not all statistically significant differences are shown in the report. Statistically significant differences are shown for top response options only.*

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Summary of Findings

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BEV ALC

insights

- Price has emerged as the primary purchase decision factor for both In-Store and Online buyers, potentially leading to a more commoditized market
- The main reasons for store preference are perceived good prices and convenience, indicating that brands offering optimal value and location will attract more shoppers
- The Liquor/Spirits category has seen the most significant decline in the average number of product types purchased
- In-Store and Online buyers are increasing their preference for chilled products, while unchilled is declining

challenges

- Navigating the cost-of-living crisis as consumers opt for a more cautious behavior and cut back on spending
- Adapting to the shift in consumer preferences towards chilled products and smaller pack sizes
- Combating the declining effectiveness of in-store displays and the simplified purchasing process
- Addressing the reduced attentiveness of shoppers and the diminishing factors motivating them to try new products

opportunitie s

- Explore the increasing adoption of online channels and mobile devices for purchasing alcoholic drinks
- Focus on providing an optimal value equation to attract more shoppers by offering good prices
- Emphasize uniqueness and smooth taste to attract shoppers motivated by flavor
- Explore the growing popularity of liquor stores and mass merchandisers as preferred options for both In-Store and Online buyers

Path to purchase overview

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Alcoholic Beverage Path to Purchase Overview - 2024

	Reason for purchase	Shopping actions taken	Purchase motivators	Purchase destination	
In-store	52% home 15% restock 10% party 10% unplanned (2023: 7%)	45% compared prices 16% talked to staff 11% browsed (2023: 14%)	48% experience w/ brand (2023: 62%) 17% brand image (2023: 23%) 16% enticing flavor (2023: 27%)	29% liquor store 24% grocery store 17% mass merch	85% purchased in-store
Online for delivery*	47% home 13% restock 12% party 9% unplanned	46% browsed 32% found store for delivery 23% read reviews (2023: 45%)	36% experience w/ brand 23% site / app was easy to use (2023: 38%) 22% appealing packaging	25% DoorDash (2023: 7%) 15% Grocery Store website 12% Uber Eats	7% purchased online for delivery*
Online for pickup*	29% home 17% unplanned 14% party 12% restock	42% browsed 34% found store for purchase 33% found store for pickup	23% recommendation from friend/family 22% experience w/ brand 21% appealing packaging	27% mass merch 20% liquor store 15% grocery store	8% purchased online for pickup*

Purchased online: 15%

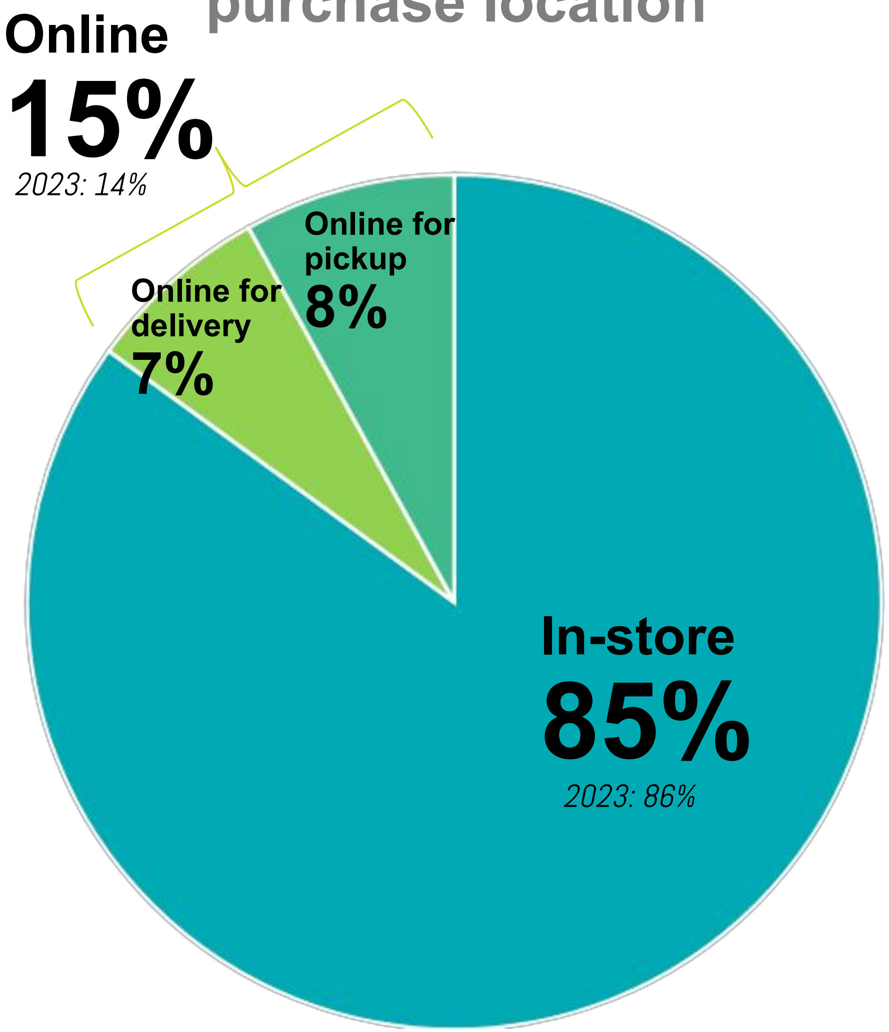
*Sample size is n<100; interpret results directionally and with caution.

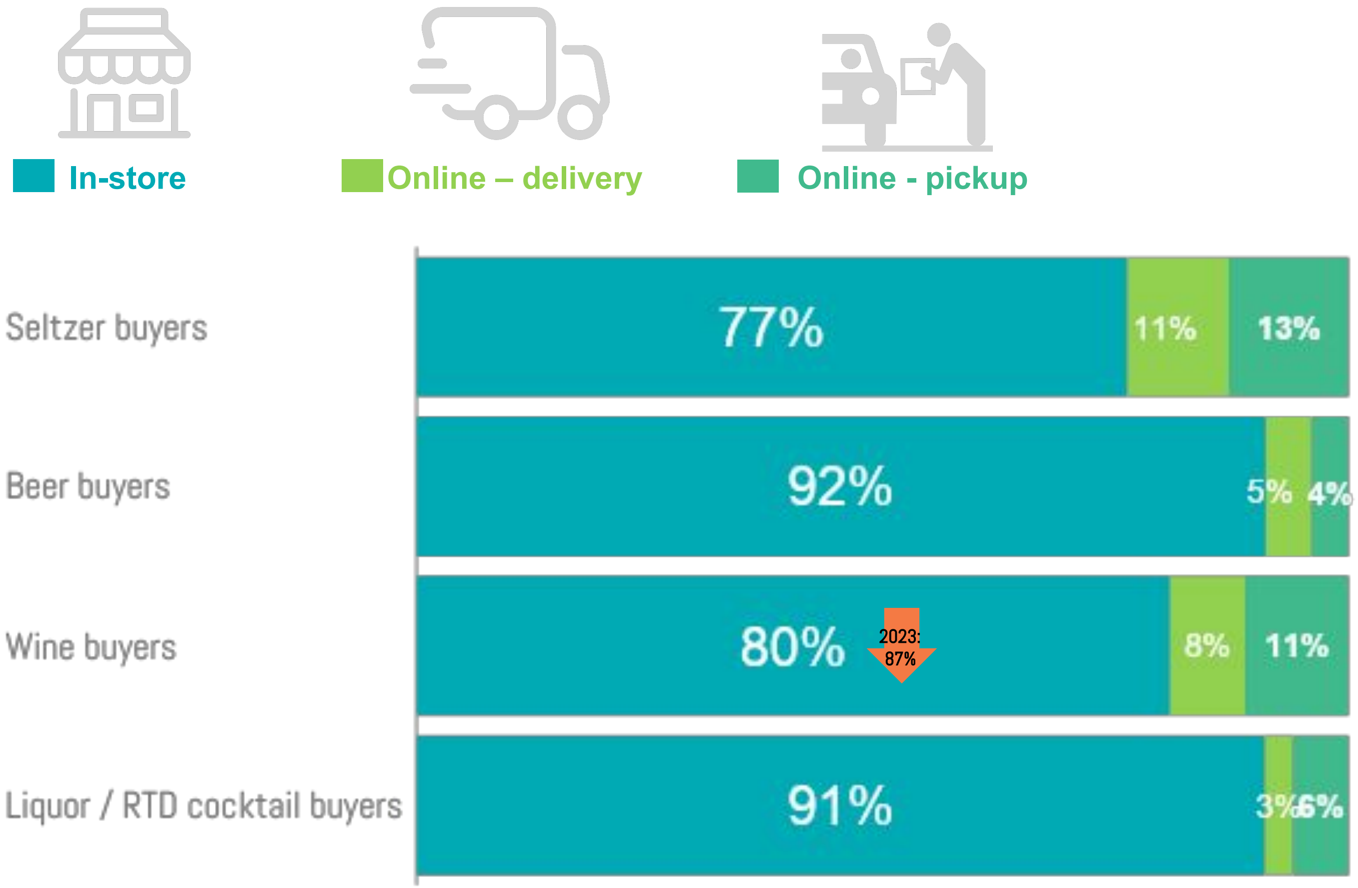
Data Source: 2024 BACi Consumer Study. *Total respondents, n=1,250. Bought bev alc in-store most recently, n=1,062. Bought bev alc online most recently, n=188. Bought bev alc online for delivery most recently, n=84*. Bought bev alc online for pickup most recently, n=104* *Bought bev alc online for pickup most recently, n=104* Q111. Reason for purchase, Q120 purchase location, Q200 online activities, Q215 online purchase location, Q300 in-store activities, Q305 in-store purchase location, Q310 purchase motivators

Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

Overall channel preference remains consistent with last year; however, a closer examination of category trends reveals that Wine Buyers are increasingly receptive to online options.

Most recent purchase location





Online purchase location split out into "online for delivery" and "online for pickup" in 2023 vs 2024.

Data Source: 2024 BACi Consumer Study. Total respondents, n=1,250. Bought bev alc in-store most recently, n=1,062. Bought bev alc online most recently, n=188. *Beer buyers, n=313. Wine buyers, n=312. Liquor / RTD cocktail buyers, n=312. Seltzer buyers, n=313.*

Q120. Did you make your most recent purchase of [INSERT CATEGORY] online or in a physical store?

Statistically significant differences at the 95% confidence level:

Higher or lower than 2023

Regarding product variety, consumers are purchasing fewer types of alcoholic drinks, potentially suggesting a more cautious spending approach. Liquor categories have seen a greater decline.

Data Source: 2024 BACi Consumer Study. **Response options with <5% of responses and "Other" responses not shown in above chart.*

Q100. Which beer product(s) did you buy, specifically, during your most recent purchase? *Please select all that apply. Base: purchased beer / seltzer during most recent trip for bev alc, 2024, n=313 2023, n=319.*

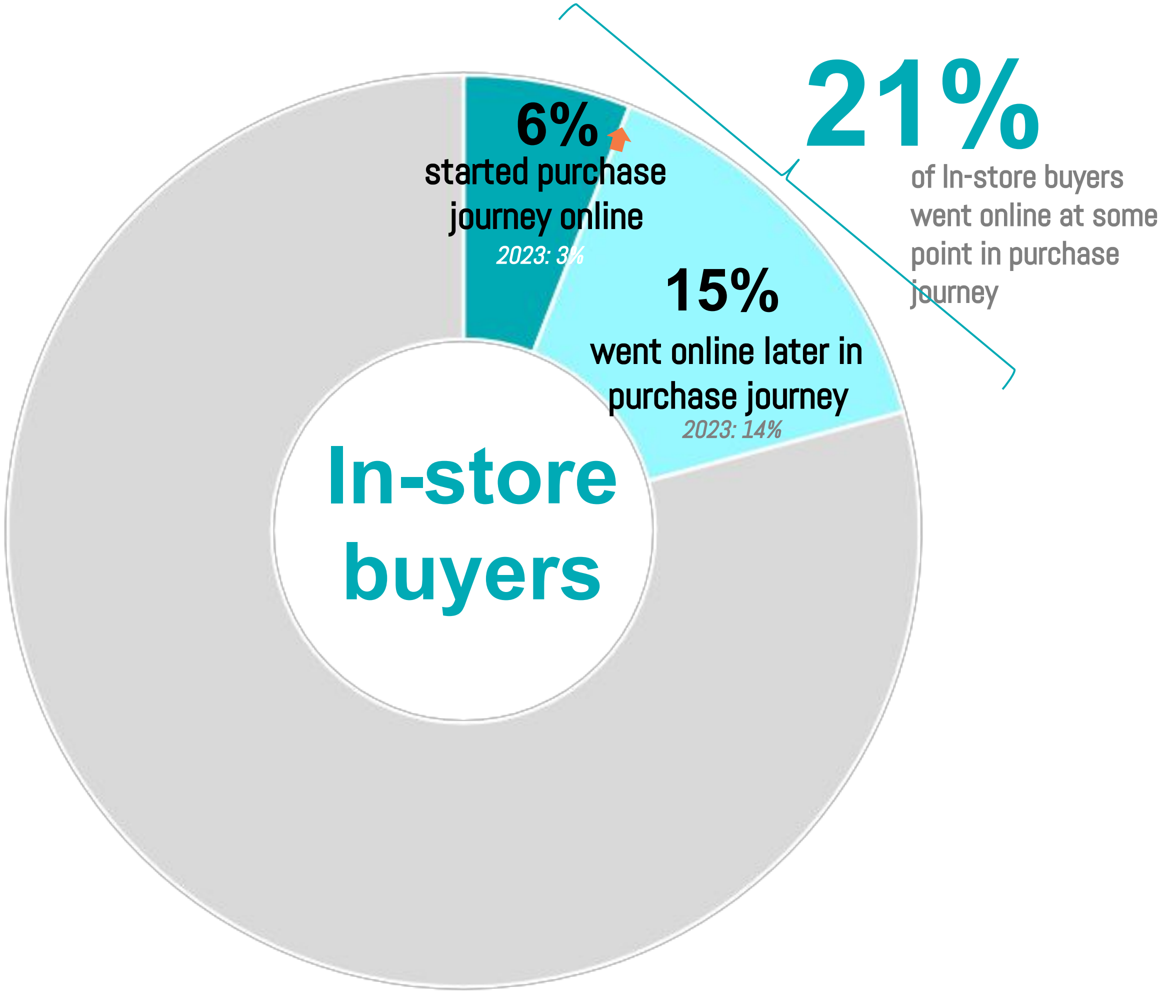
Q105. Which wine product(s) did you buy, specifically, during your most recent purchase? *Please select all that apply. Base: purchased wine during most recent trip for bev alc, 2024, n=312. 2023, n=313.*

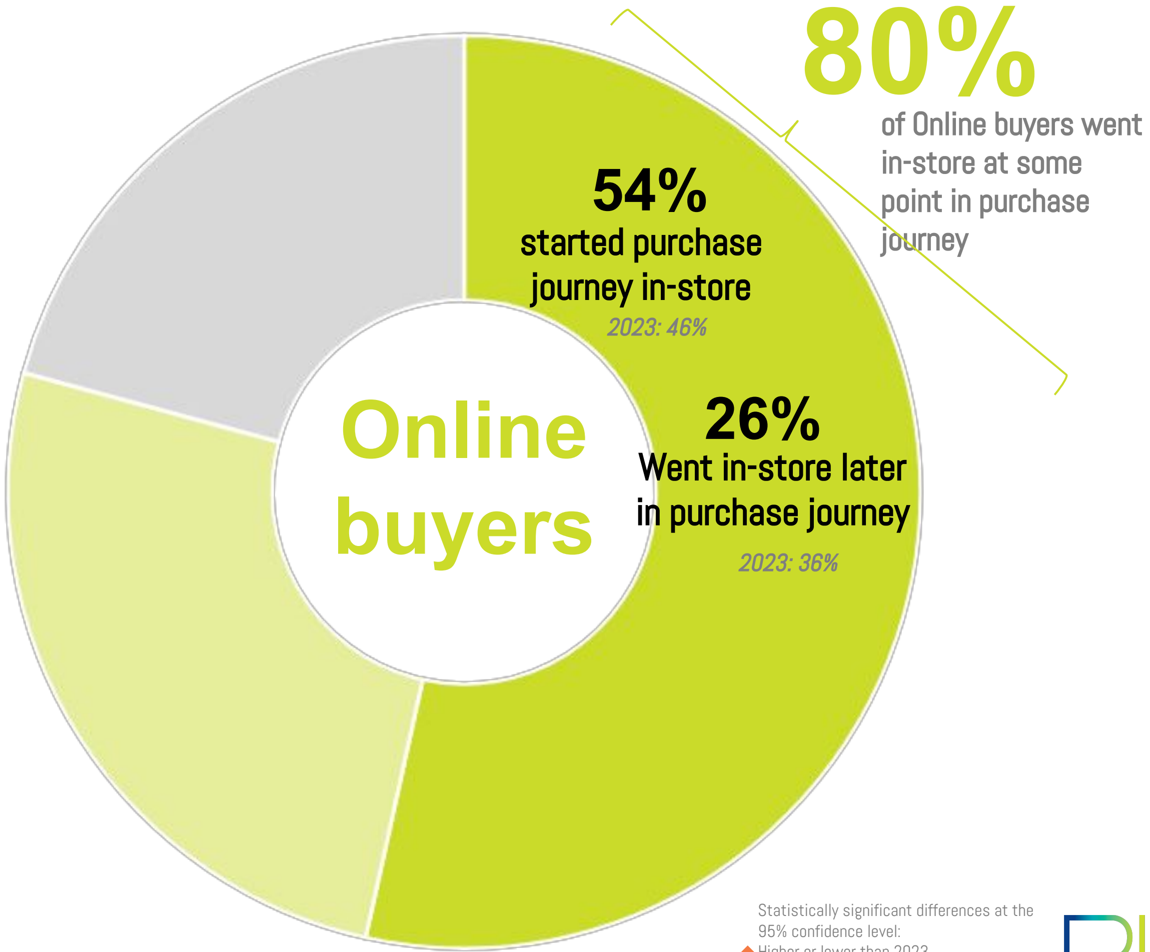
Q110. Which liquor/spirit product(s) did you buy, specifically, during your most recent purchase? *Please select all that apply. Base: purchased liquor / RTD cocktails during most recent trip for bev alc, 2024, n=312. 2023, n=311.*

Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

In-Store buyers are more inclined to utilize a cross-channel approach compared to last year, often turning to online resources later in their decision-making process.

Cross-channel shopping



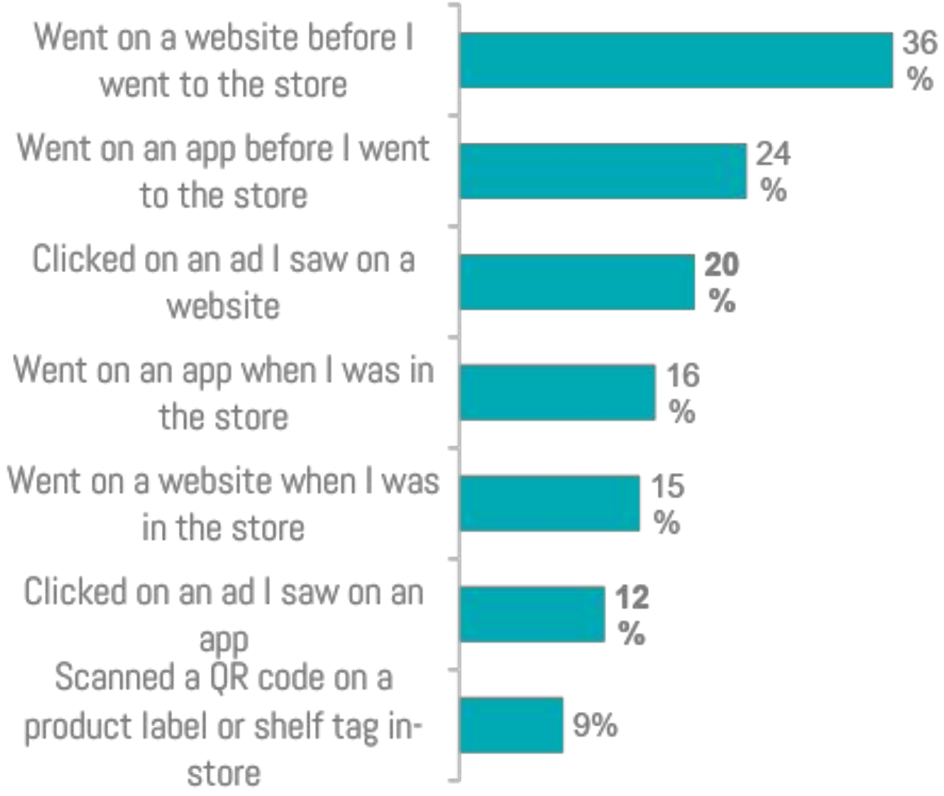


Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

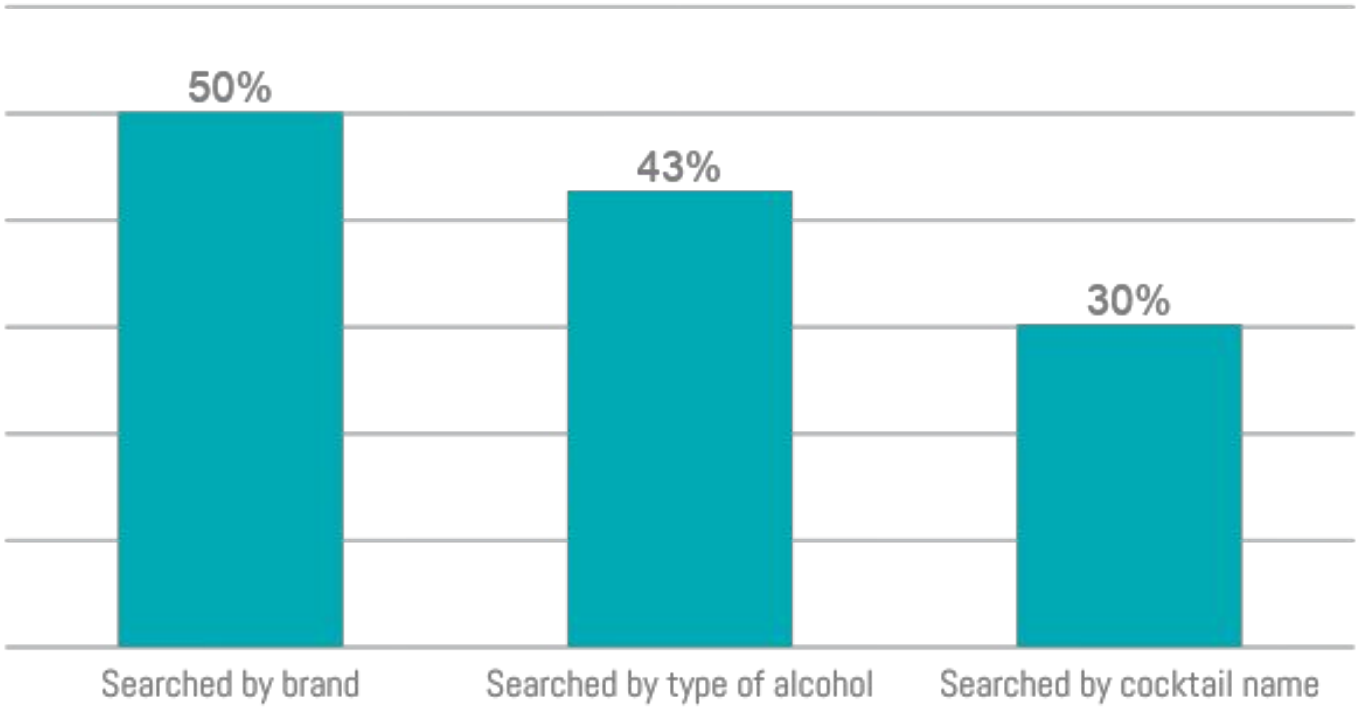
Data Source: 2024 BACi Consumer Study.
Q115. Which of the following best describes where you "went" to look for the product when you most recently decided to purchase [INSERT CATEGORY]? *Please select one. Bought bev alc in-store most recently, 2024, n=1062. 2023, n=1,096. Bought bev alc online most recently, 2024, n=188. 2023, n=168.*
Q125. At any point in between considering your most recent purchase of [INSERT CATEGORY] and the time you made your purchase, did you go online to look at products or information related to the product(s)? *Base: looked in-store and purchased in-store, 2024, n=1009. 2023, n=1,059.*
Q130. At any point in between considering your most recent purchase of [INSERT CATEGORY] and the time you made your purchase, did you go to a physical store to look at products or information related to the product(s)? *Base: looked online and purchased online, 2024, n=93. 2023, n=95.*

Among In-Store buyers who go online, they are more likely to browse without being driven by ads. Online searches usually begin with a search by brand or type of alcohol

Ways of looking at products online for most recent purchase - In-Store buyers

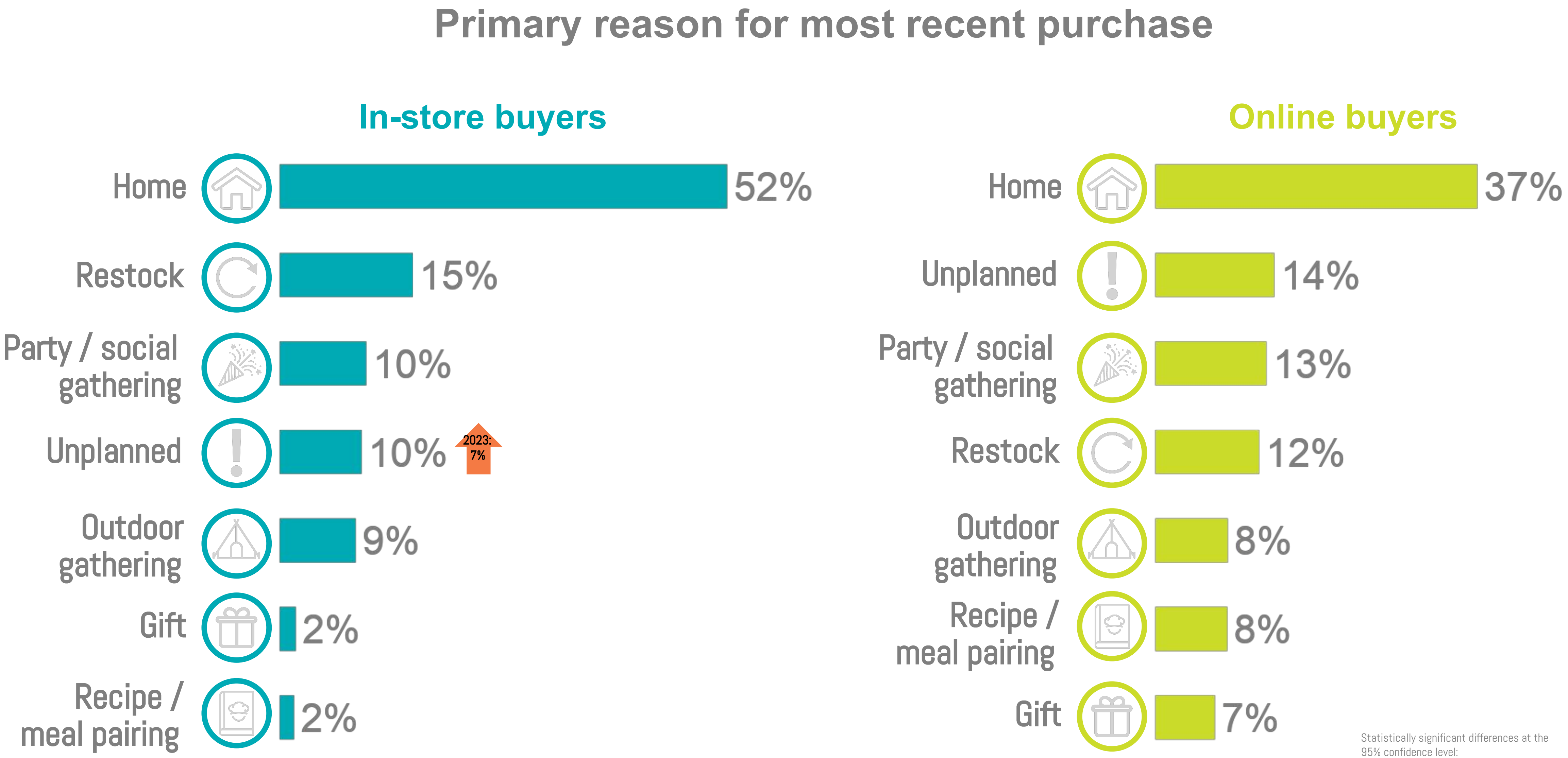


How products are searched online for most recent purchase - In-Store buyers



New questions added in 2024.
*"Other" response option chosen by <5% of total respondents; not shown in above chart.
Data Source: 2024 BACi Consumer Study.
Q126. In which of the following ways did you go online to look at products or information related to for your most recent purchase? *Went online during In-Store purchase journey. 2024, n=163.*
Q127. Which of the following describes how you searched for products or information online related to for your most recent purchase? *Went online during In-Store purchase journey. 2024, n=163.*

While home occasions remain the primary reason for purchases, sporadic consumption is gaining importance among In-Store buyers.



Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

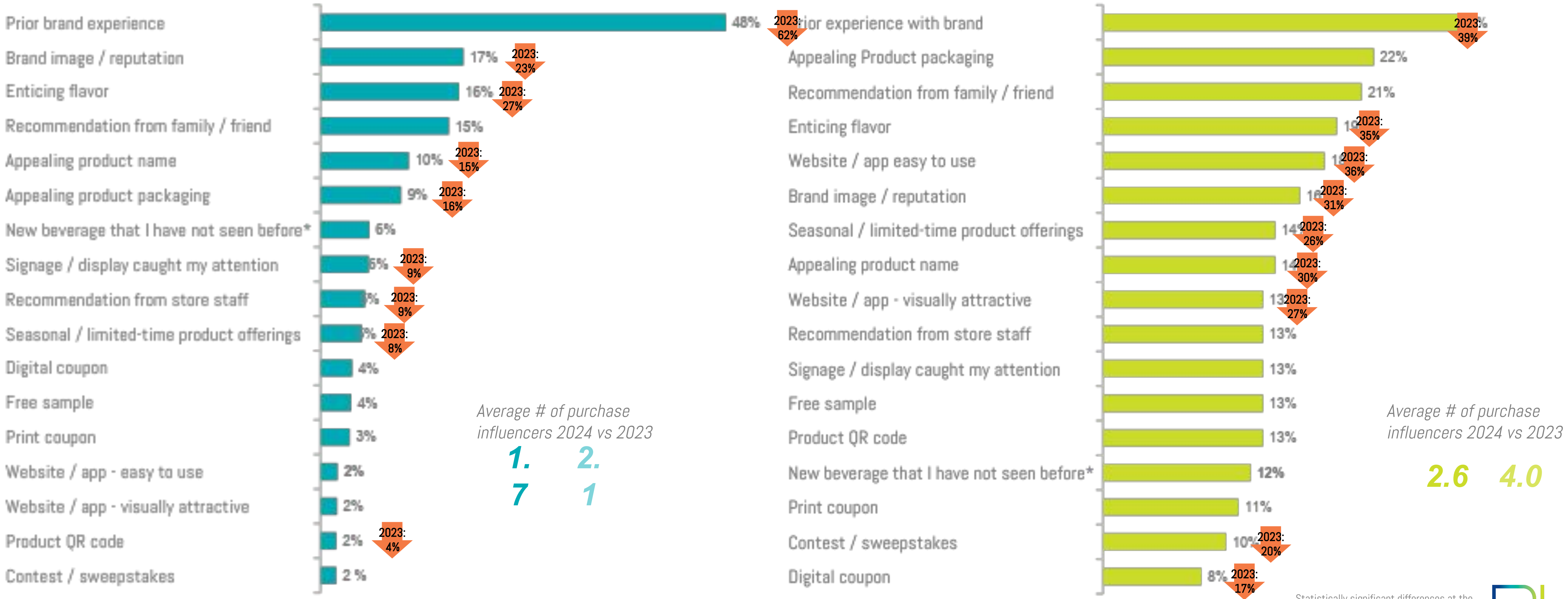
*"Other" response option chosen by <1% of total respondents; not shown in above chart.
Data Source: 2024 BACi Consumer Study. *Bought bev alc in-store most recently, 2024, n=1,062. 2023, n=1,096. Bought bev alc online most recently, 2024, n=188. 2023, n=168.*
Q111. What was the primary reason for your most recent purchase of [INSERT CATEGORY]? *Please select one.*

Both In-Store and Online buyers are less susceptible to influence in 2024, as several influencers reduce persuasive power significantly. Prior brand experience continues to be the primary driver.

Purchase influencers

In-store buyers

Online buyers



Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

"New beverage that I have not seen before" added as a new response option in 2024.
*"Other" response option chosen by 3% of total respondents; "None of the above" chosen by 7% of total respondents; not shown in above chart.
Data Source: 2024 BACi Consumer Study. *Bought bev alc in-store most recently, 2024, n= 1,062. 2023, n=1,096. Bought bev alc online most recently, 2024, n=188. 2023, n=168.*
Q310. When you were most recently shopping for [INSERT CATEGORY], which, if any, of the following influenced your purchase decision? *Please select all that apply.*

Purchase decision factors

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In 2024, both In-Store and Online buyers show a clear preference for chilled products, while un-chilled options are declining in popularity.

Chilled vs. unchilled

Most recent purchase

In-store buyers

	2024	2023
Chilled	55%	56%
Un-Chilled	47%	52%

Online buyers

	2024	2023
Chilled	68%	75%
Un-Chilled	40%	55%

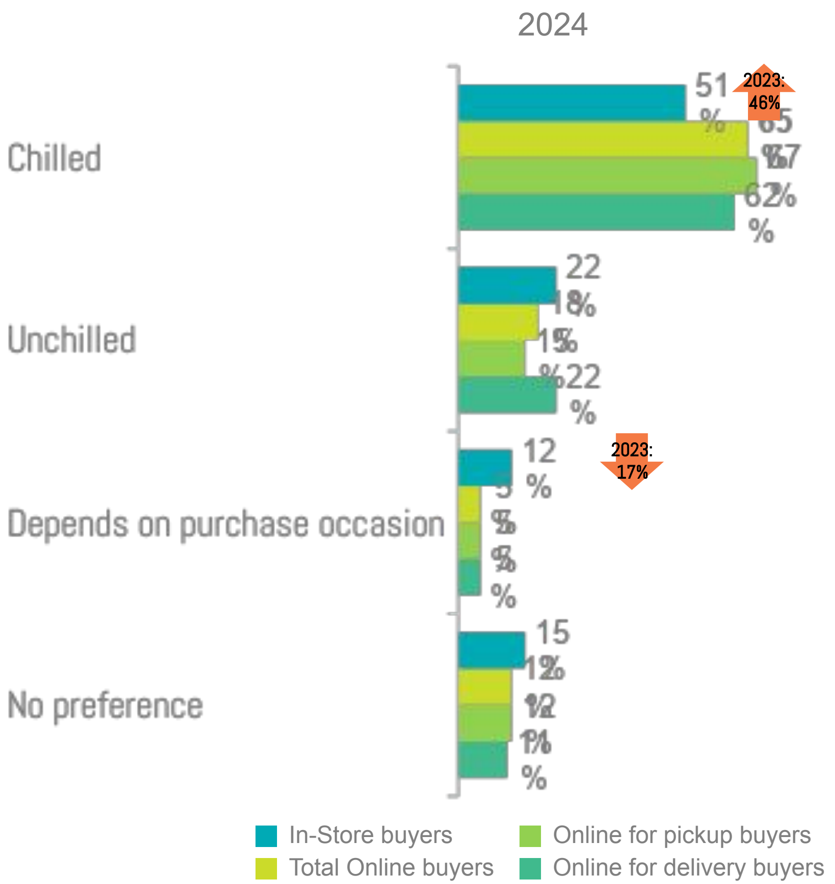
Online for pickup*

	2024	2023
Chilled	73%	75%
Un-Chilled	38%	61%

Online for delivery*

	2024	2023
Chilled	62%	75%
Un-Chilled	43%	49%

Preference

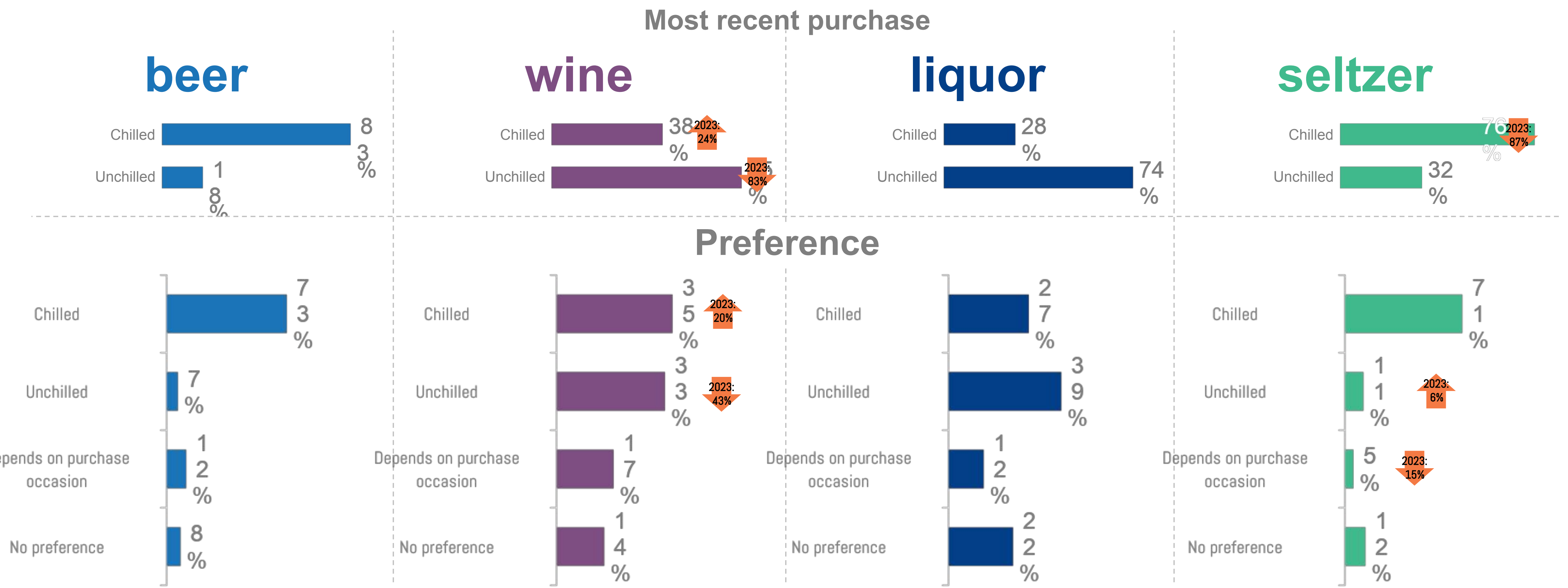


*Sample size is n<100; interpret results directionally and with caution.
Data Source: 2024 BACi Consumer Study. *Bought bev alc in-store most recently, 2024, n= 1,062. 2023, n=1,096. Bought bev alc online most recently, 2024, n=188. 2023, n=168. Online for pickup, 2024, n=104. 2023, n=94*. Online for delivery, 2024, n=84*. 2023, n=74*.*
Q110B. Which of the following best describes your most recent purchase of [insert category from S3 / selected cell]?
Q110C. Which of the following describes what you typically prefer to purchase for [insert category from S3 / selected cell]?

Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

Wine shoppers are increasingly favoring chilled products compared to last year, while hard seltzer consumers appear more open to un-chilled options this year.

Chilled vs. unchilled

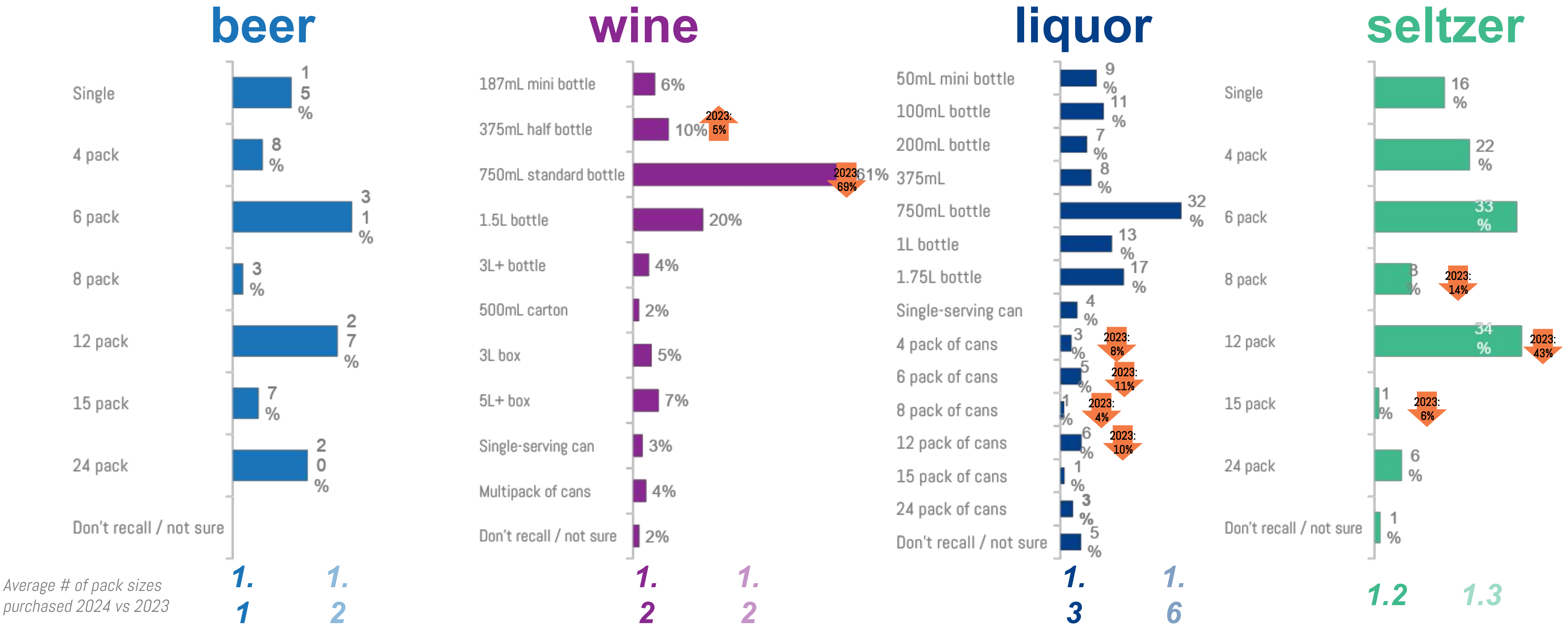


Data Source: 2024 BACi Consumer Study. *Beer buyers, 2024, n=313. 2023, n=319. Seltzer buyers, 2024, n=313. 2023, n=321. Wine buyers, 2024, n=312. 2023, n=313. Liquor buyers, 2024, n=312. 2023, n=311*
Q110B. Which of the following best describes your most recent purchase of [insert category from S3 / selected cell]?
Q110C. Which of the following describes what you typically prefer to purchase for [insert category from S3 / selected cell]?

Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

In 2024, consumers are reducing the number of pack sizes purchased, favoring smaller packs that suggest lower price points.

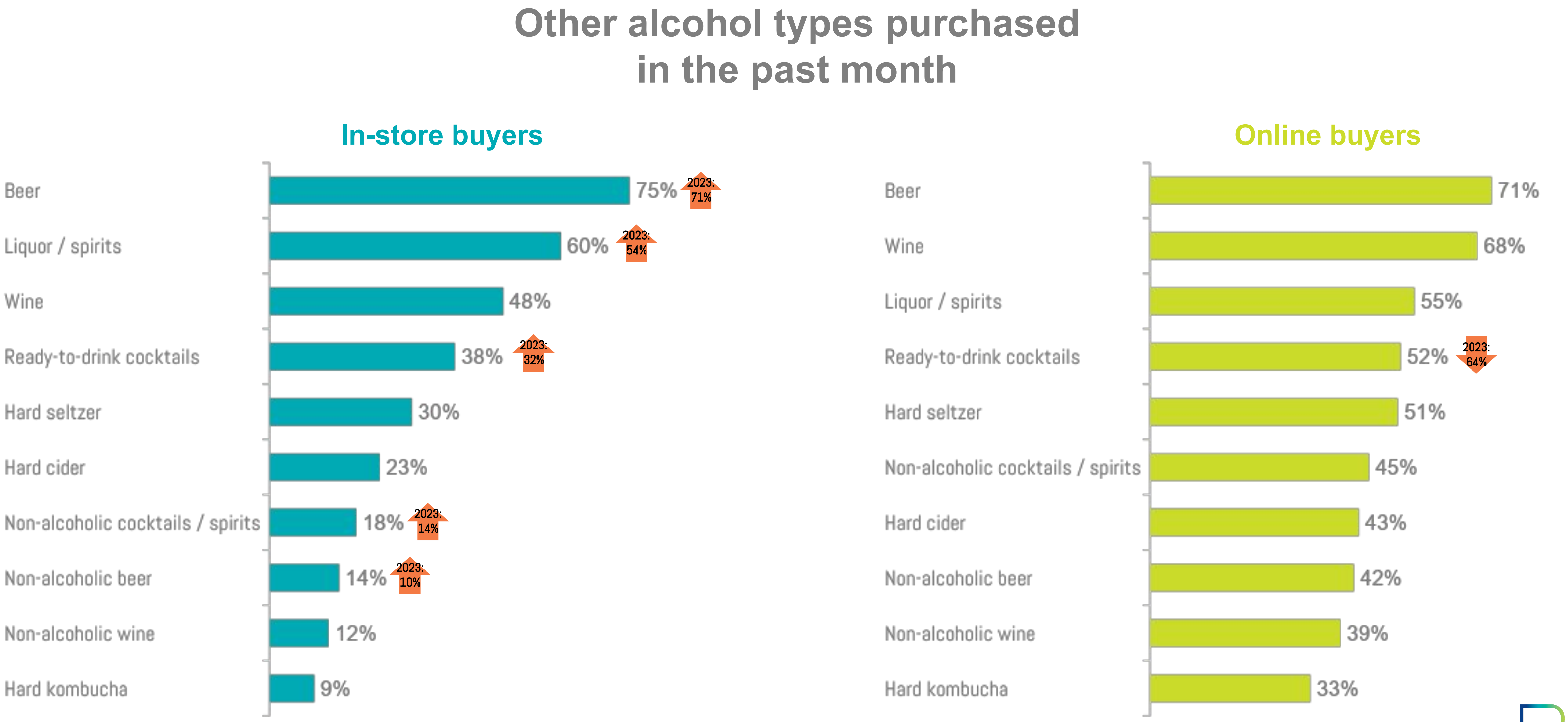
Pack sizes



Data Source: 2024 BACi Consumer Study. *Beer buyers, 2024, n=313. 2023, n=319. Seltzer buyers, 2024, n=313. 2023, n=321. Wine buyers, 2024, n=312. 2023, n=313. Liquor buyers, 2024, n=312. 2023, n=311*
Q110D. Which of the following pack size(s) of cans or bottles did you buy in your most recent purchase of [insert category from S3 / selected cell]? *Please select all that apply.*
Q110E. Which of the following pack size(s) did you buy in your most recent purchase of wine? *Please select all that apply.*
Q110F. Which of the following pack size(s) did you buy in your most recent purchase of liquor / spirits? *Please select all that apply.*

Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

In-Store buyers seem more willing to purchase various types of alcohol compared to 2023. In the case of Online buyers, the appeal of RTD cocktails has declined.



Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

*New breakouts added for RTD cocktails, hard seltzer, hard cider, non-alcoholic cocktails / spirits / wine / beer, and hard kombucha in 2023 & 2024.
Data Source: 2023 & 2024 BACi Consumer Study. *Bought bev alc in-store most recently, 2024, n=1,062. 2023, n=1,096. Bought bev alc online most recently, 2024, n=188. 2023, n=168.*
S3. When was the most recent time, if ever, that you purchased the following beverages?

Consumer decision analysis

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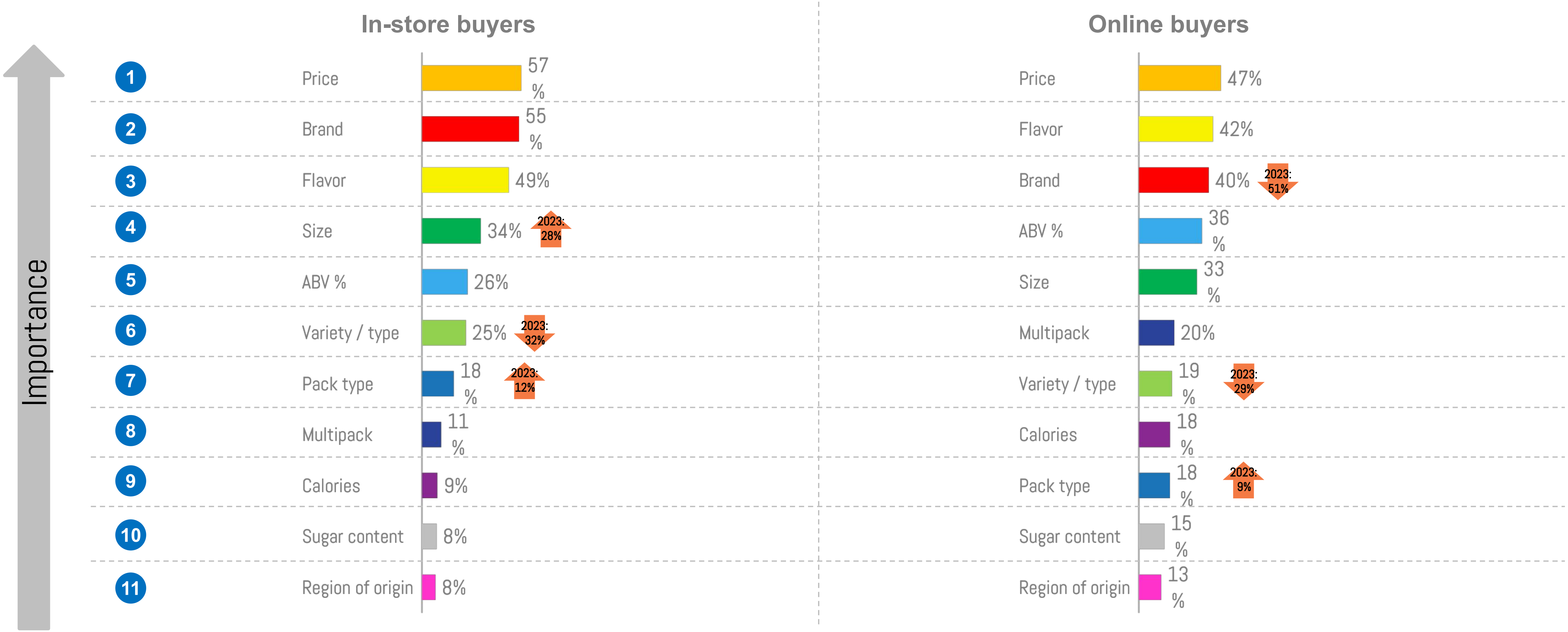
In 2024, price emerges as the primary purchase decision factor for both In-Store and Online buyers, potentially leading to a more commoditized market, with brand preference following behind.

Purchase decision factors 2024

Ordered from most to least important; each % represents those who selected it in their top 3 most important factors (net top 3)



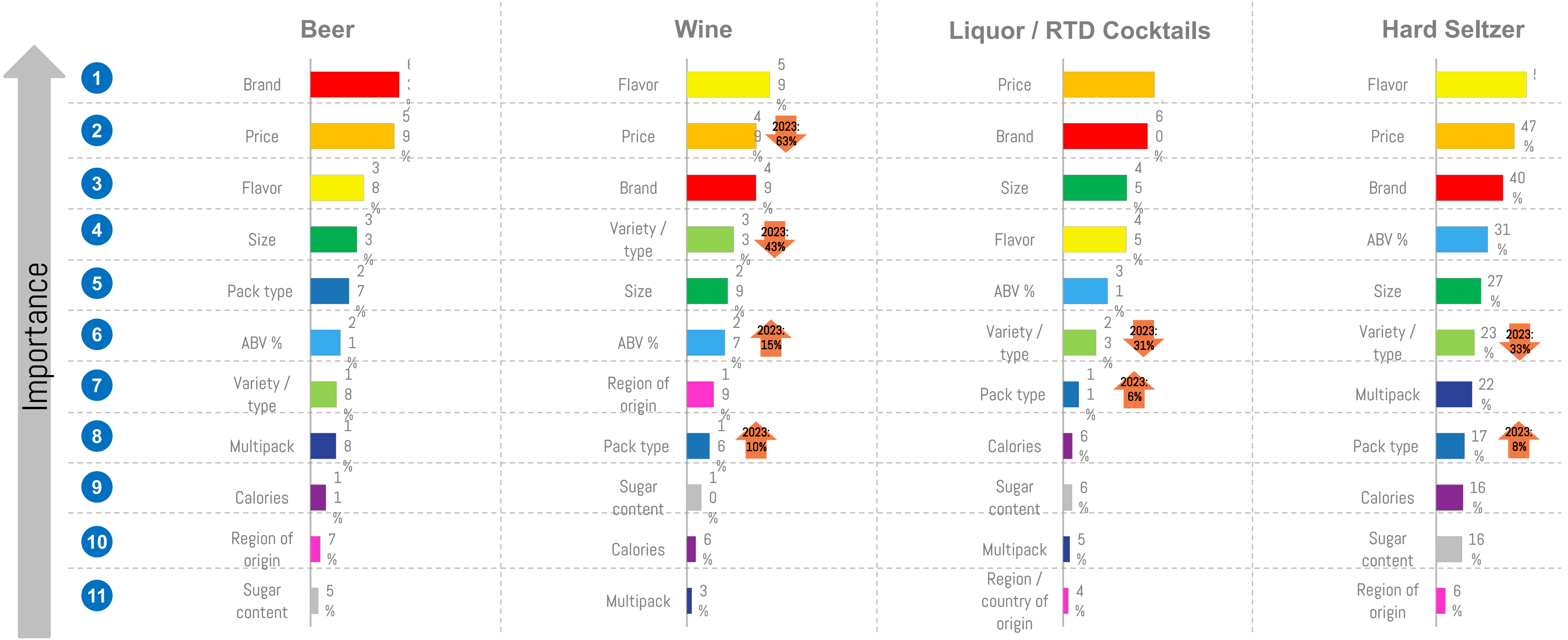
Data Source: 2024 BACi Consumer Study. Total respondents, 2024, n=1,250. 2023, n=1,264. *Bought bev alc in-store most recently*, 2024, n=1,062. 2024, *n=1,096. Bought bev alc online most recently*, 2024, n=188. 2023, *n=168.*
Q110A. Please think back to your most recent purchase of [insert category from S3 / selected cell] ; when you were standing in front of the shelf or browsing a website for [insert category from S3 / selected cell] , which of the following criteria were important to you when you made your product selection? *Please rank the following factors from 1 to 11, where "1" is the **most** important factor and "11" is the **least** important factor. Please exclude sales / discounts / coupons from your consideration.*

Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

Purchase decision factors differ by category: beer consumers prioritize brand preference, wine and hard seltzer buyers emphasize flavor, while price becomes more important for spirits consumers.

Purchase decision factors 2024

Ordered from most to least important; each % represents those who selected it in their top 3 most important factors (net top 3)



Data Source: 2024 BACi Consumer Study.

Total respondents, 2024, n=1,250. 2023, n=1,264. Beer buyers, 2024, n=313. 2023, n=319. Wine buyers, 2024, n=312. 2023, n=313. Liquor / RTD cocktail buyers, 2024, n=312. 2023, n=311. Seltzer buyers, 2024, n=313. 2023, n=321.

Q110A. Please think back to your most recent purchase of [insert category from S3 / selected cell] ; when you were standing in front of the shelf or browsing a website for [insert category from S3 / selected cell] , which of the following criteria were important to you when you made your product selection? *Please rank the following factors from 1 to 11, where "1" is the **most** important factor and "11" is the **least** important factor. Please exclude sales / discounts / coupons from your consideration.*

Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

In-store purchase journey

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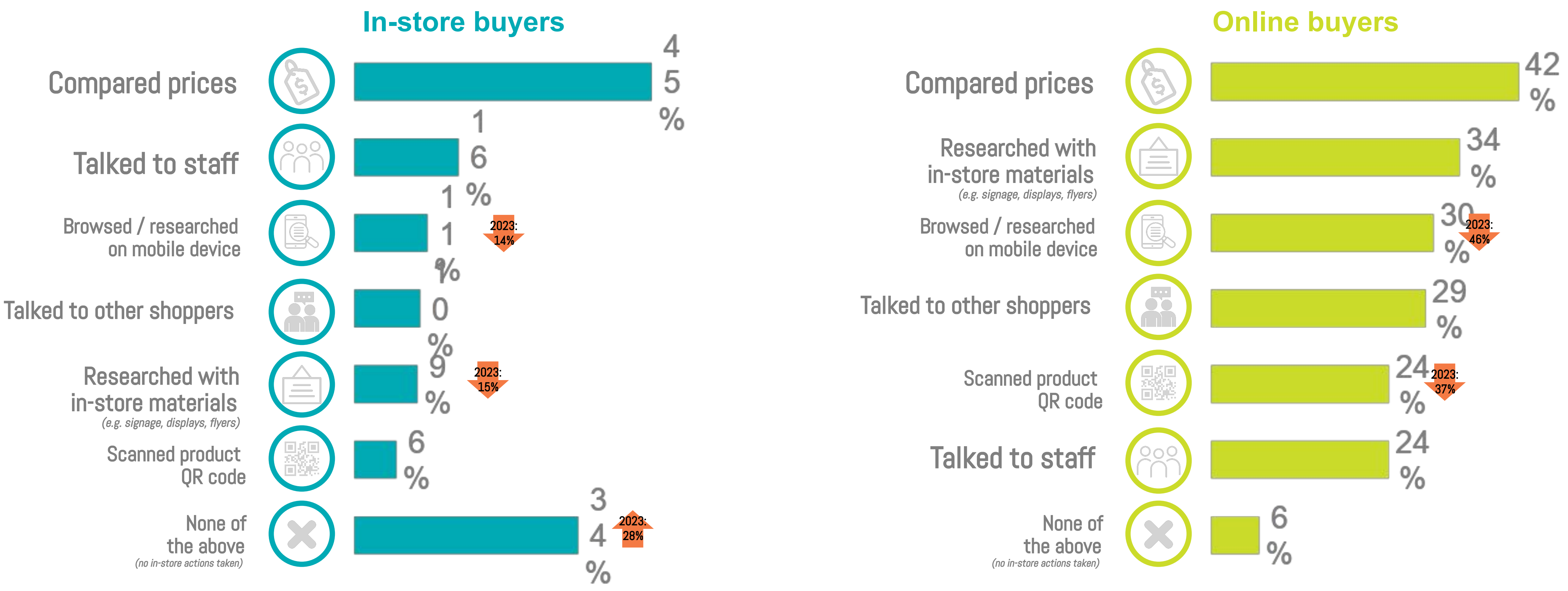
In 2024, comparing prices is the primary in-store action for buyers, and the number of in-store actions has decreased, suggesting a more simplified purchase process.

In-store actions taken



Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

*"Other" response option chosen by 3% of total respondents; not shown in above chart.
Data Source: 2024 BACi Consumer Study. *Base: went in-store and purchased in-store most recently, 2024, n=1,062. 2023, n=1,096. Went in-store and purchased online most recently, 2024, n=158. 2023, n=143.*
Q300. Thinking about your most recent in-store experience shopping for [INSERT CATEGORY], what did you do while you were there? *Please select all that apply.*

in-store purchase influencers

among in-store buyers

prior brand experience

2024	2023
↓48%	62%

brand image

2024	2023
↓17%	23%

enticing flavor

2024	2023
↓16%	27%

friend / family reco

2024	2023
15%	16%

appealing name

2024	2023
↓10%	15%

appealing packaging

2024	2023
↓9%	16%

new type of

2024	2023
6%	n/a

signage / display

2024	2023
↓6%	9%

reco from staff

2024	2023
↓5%	9%

seasonal product

2024	2023
↓5%	8%

digital coupon

2024	2023
4%	4%

free sample

2024	2023
4%	5%

print coupon

2024	2023
3%	4%

"New beverage that I have not seen before" added as a new response option in 2024.

Data Source: 2024 BACi Consumer Study. *Base: went in-store and purchased in-store most recently, 2024, n=1,062. 2023, n=1,096.*

Q310. When you were **most recently** shopping for [INSERT CATEGORY], which, if any, of the following influenced your purchase decision? *Please select all that apply.*

Statistically significant differences at the 95% confidence level:
↑ Higher or lower than 2023

In-store, the most influential displays are those positioned above products. However, some levers such as flyers and touchscreen digital assistant are less impactful compared to last year.

In-store signage / display purchase influencers

among those who were influenced by in-store signage / displays

Entering the store

front entrance display	26%
window sign	18%
outdoor sign	24%

Browsing the store

floor sticker	18%	
wall banner	23%	
flyer	10%	2023: 22%
touchscreen digital assistant	9%	2023: 22%
video screen	12%	
ceiling banner	13%	
digital sign	10%	
inflatable display	10%	

Shopping in-aisle

sign above product display	33%	
cooler sticker	18%	2023: 32%
freestanding aisle display	23%	
neck hanger / bottle tag	15%	

POS / checkout

checkout counter sign	18%

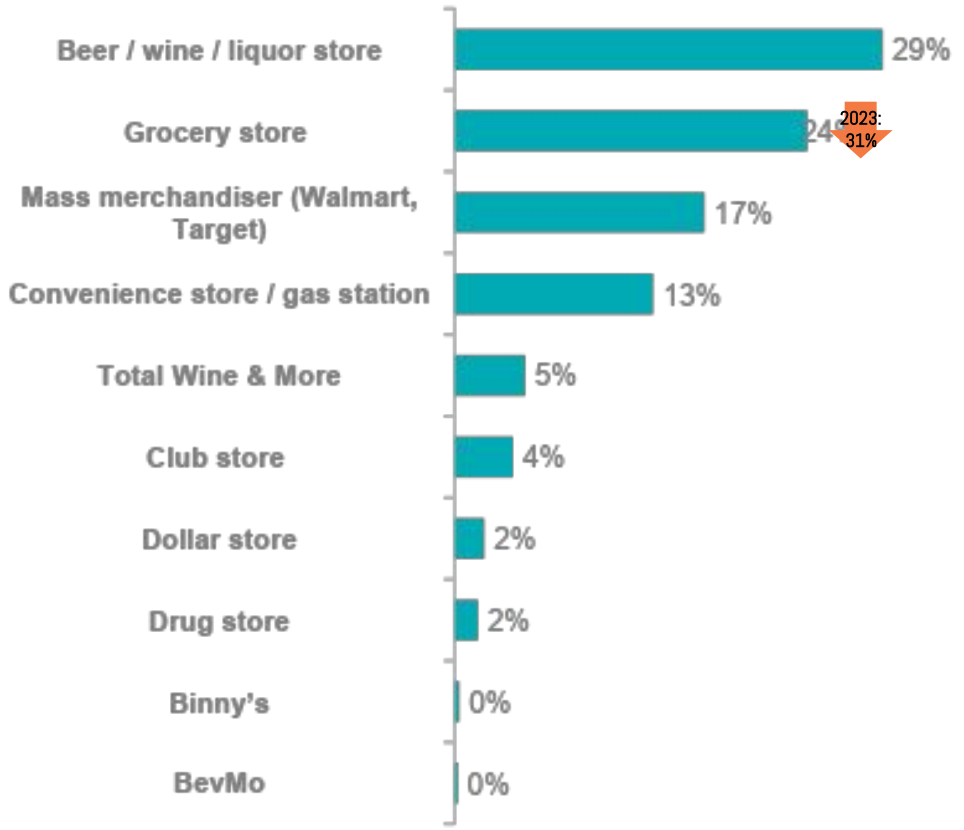
"Other" response option selected by 4% of respondents; not shown in above chart.
Data Source: 2024 BACi Consumer Study. *Base: in-store buyers + online buyers who were influenced to purchase by in-store signage/displays, 2024, n=83*. 2023, n=119.*
Q311. Which of the following type(s) of **signage / displays** influenced your most recent purchase decision of [INSERT CATEGORY]? *Please select all that apply.*

Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

Liquor stores emerge as the preferred option for In-Store buyers, surpassing grocery stores. A similar trend is observed for Online buyers, with Mass Merchandisers and Liquor stores gaining prominence.

In-store purchase destination

In-store buyers



Online buyers

Sample size is n<100; interpret results directionally and with caution.

Data Source: 2024 BACi Consumer Study. *Base: purchased in-store most recently, 2024, n=1,062. 2023, n=1,096. Purchased online for pickup most recently, 2024, n=104. 2023, n=94.**

Q305. From which retailer did you make your most recent purchase of [INSERT CATEGORY]?

Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

The reasons for purchasing in-store rather than online include the need for quicker access to products and a preference for examining items in person due to skepticism.

Barriers to buying online: why did you look online, but buy in-store?

	2024	2023
needed it faster than it would ship	36% ↓	47%
wanted to look at products in person	31% ↓	48%
didn't want to pay shipping	24%	24%
wanted to talk to store staff	22%	29%
feel uncomfortable buying online and shipping home*	18%	n/a
couldn't find preferred size / flavor online	11%	14%
can't buy alcohol online in their state	6%	2%

New option included in 2024: I don't feel comfortable buying online to ship to my home.
*"Other" specify chosen by 2% of total respondents; not shown in above chart.
Data Source: 2024 BACi Consumer Study. *Base: went online but purchased in-store most recently, 2024, n=216. 2023, n=190.*
Q210. Why did you go to the store to make your most recent purchase instead of purchasing online? *Please select all that apply.* .

Statistically significant differences at the 95% confidence level:
↑ Higher or lower than 2023

Shoppers who prefer visiting the store before buying primarily seek reassurance and the opportunity to explore additional products.

Reasons for visiting the store in-person before buying*

among those who began their path to purchase online but ended buying in-store

Reason	%	Verbatims
Product assurance	53%	• "I wanted to make sure I am getting what I want exactly." • "To make sure my purchase is not damaged." • "To see if it was what I really wanted."
Variety exploration	28%	• "To see if there were other flavors, or another brand." • "I wanted to look at the product in person in case I saw another alcohol I wanted to purchase instead." • "To see the different types that they had."
Price comparison	10%	• "To compare price." • "To see what I can afford." • "I like to compare, and most of the time the stores don't have everything online."
Quality and freshness checks	5%	• "To see if it was in date." • "Quality over quantity."
Personal interaction	4%	• "Like to see, ask staff questions." • "I wanted to talk to a real person."

*New question added in 2024. *Sample size is n<100; interpret results directionally and with caution.*

Data Source: 2024 BACi Consumer Study. *Bought bev alc in-store but started their purchase journey online, 2024, n=69**

Open-end Q210B. Why did you want to look at product(s) in-person before buying? Please be as specific as possible.

Online purchase journey

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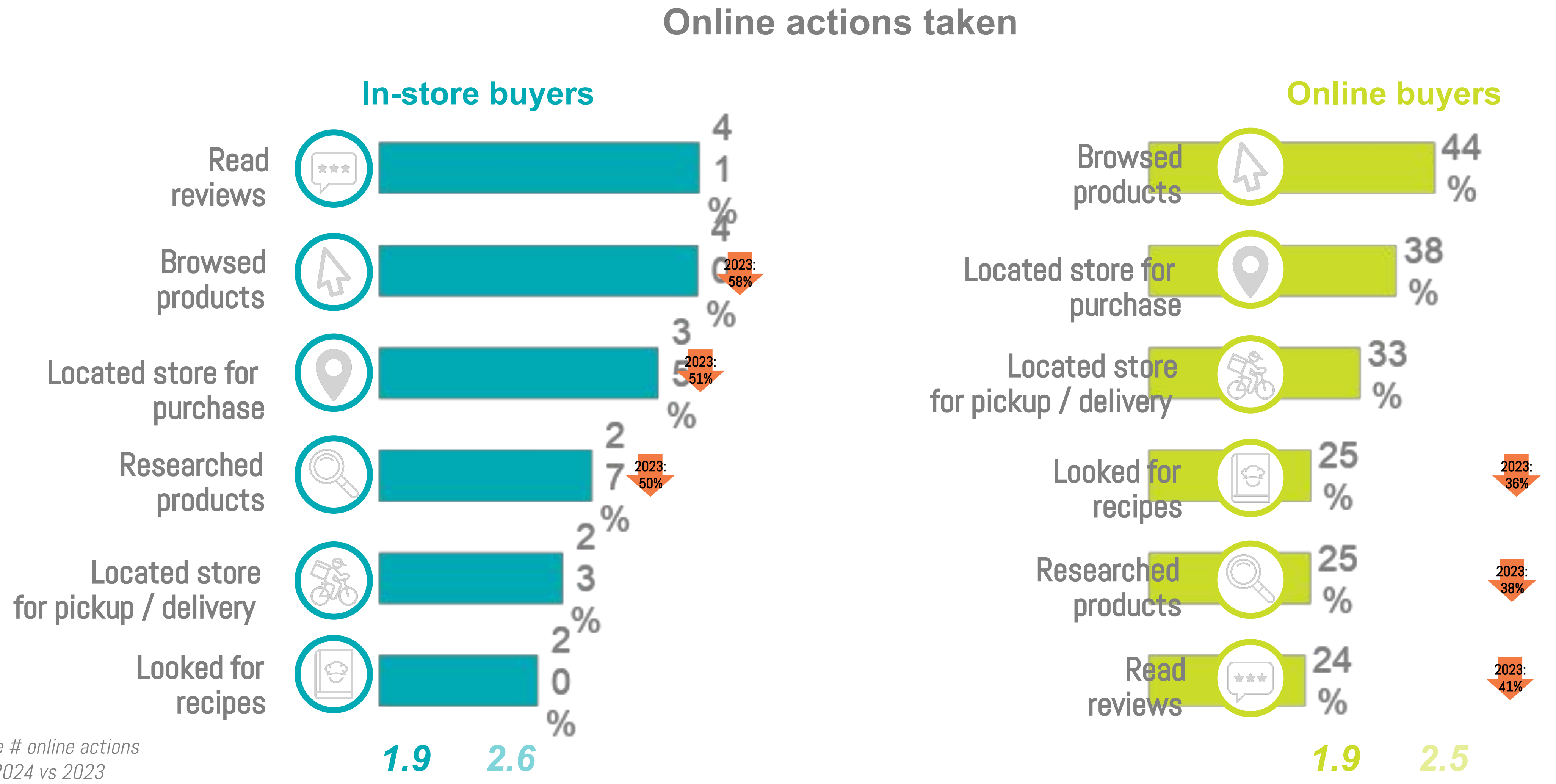
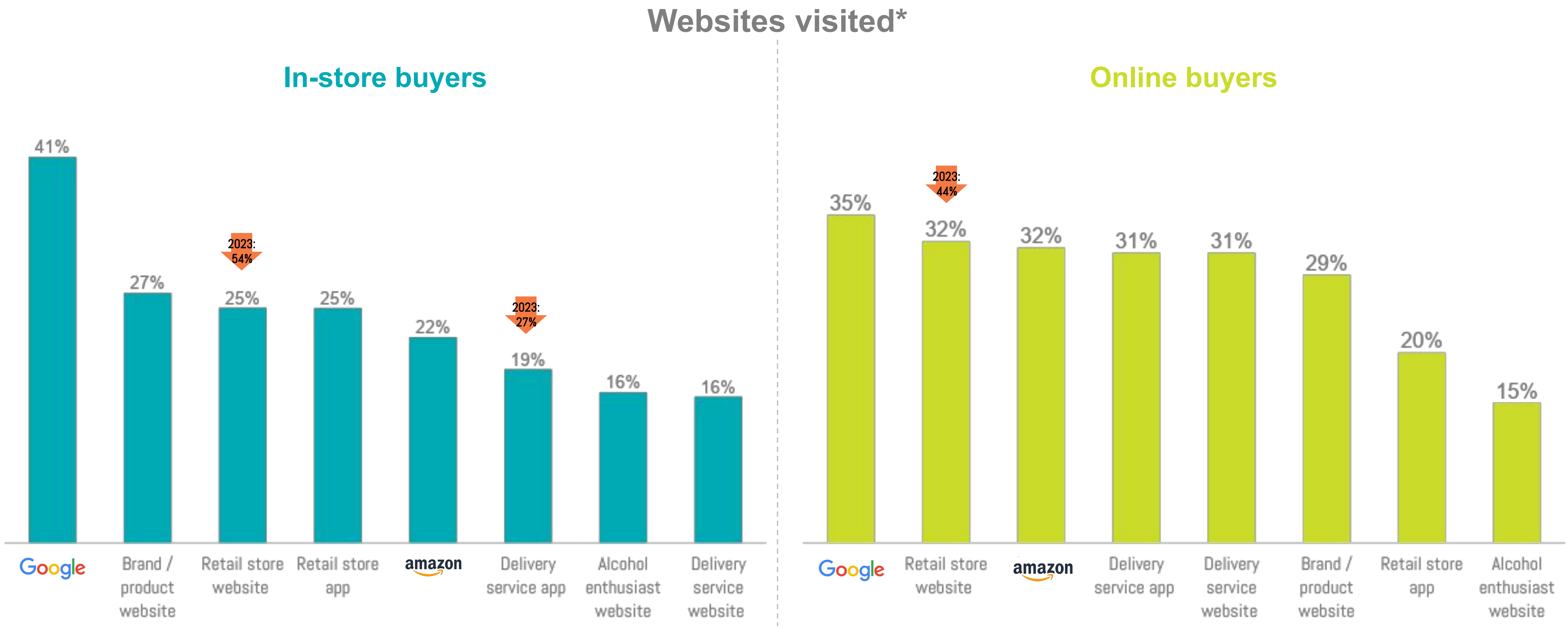
Buyers have reduced their online actions, indicating a quicker shopping process. However, browsing products remains a key activity for both In-Store and Online shoppers.



*"Other" response option chosen by 2% of total respondents; "None of the above" chosen by 2% of total respondents; not shown in above chart.
Data Source: 2024 BACi Consumer Study. *Base: went online and purchased online most recently, 2024, n=188. 2023, n=168. Went online and purchased in-store most recently, 2024, n=216. 2023, n=190.*
Q200. Thinking about your most recent online experience shopping for [INSERT CATEGORY], what did you do while you were online? *Please select all that apply.*

Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

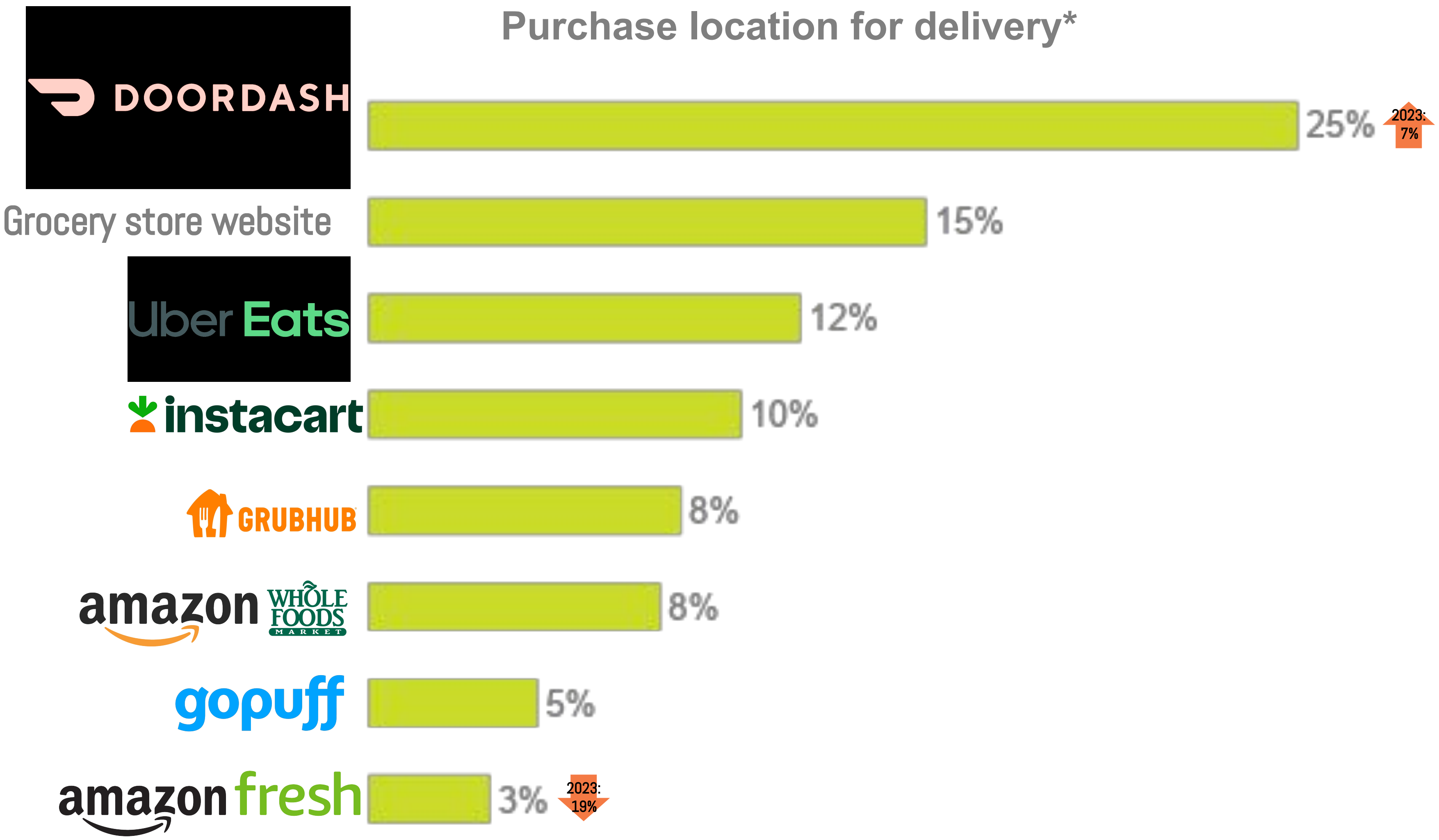
Google emerges as the primary search destination for buyers researching alcoholic drinks, with some moving away from retailer websites.



*Note: websites "visited"' does not necessarily mean that the website was the end purchase location.
"Other" response option chosen by 2% of total respondents; not shown in above chart.
Data Source: 2024 BACi Consumer Study. *Base: went online and purchased online most recently, 2024, n=188. 2023, n=168. Went online and purchased in-store most recently, 2024, n=216. 2023, n=190.*
Q205. Which website(s) did you visit online when most recently shopping for [INSERT CATEGORY]? *Please select all that apply.*

Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

The online retail landscape appears to have shifted, with DoorDash becoming the top purchase location for delivery, and a decline for Amazon Fresh.



Other" response option chosen by 14% of total respondents; "None of the above" chosen by 2% of total respondents; not shown in above chart.
Sample size is n<100; interpret results directionally and with caution.
Data Source: 2024 BACi Consumer Study. *Base: made most recent bev alc purchase online for delivery, 2024, n=84*. 2023, n=74.**
Q215. From which retailer did you make your most recent purchase of [INSERT CATEGORY]?

When choosing in-store pickup for online orders, the convenience of collecting additional items remains the primary factor. However, inconvenient delivery timing has become a significantly important consideration.

Reasons for choosing in-store pickup instead of delivery*

Data Source: 2024 BACi Consumer Study. *Bought bev alc online and picked up in-store, 2024, n=104. 2023, n=94**

Q211. Why did you go to the store to pick up your most recent online purchase of [insert category from S3 / selected cell] instead of having it delivered to your home? *Please select all that apply.*

General shopping behaviors: in-store

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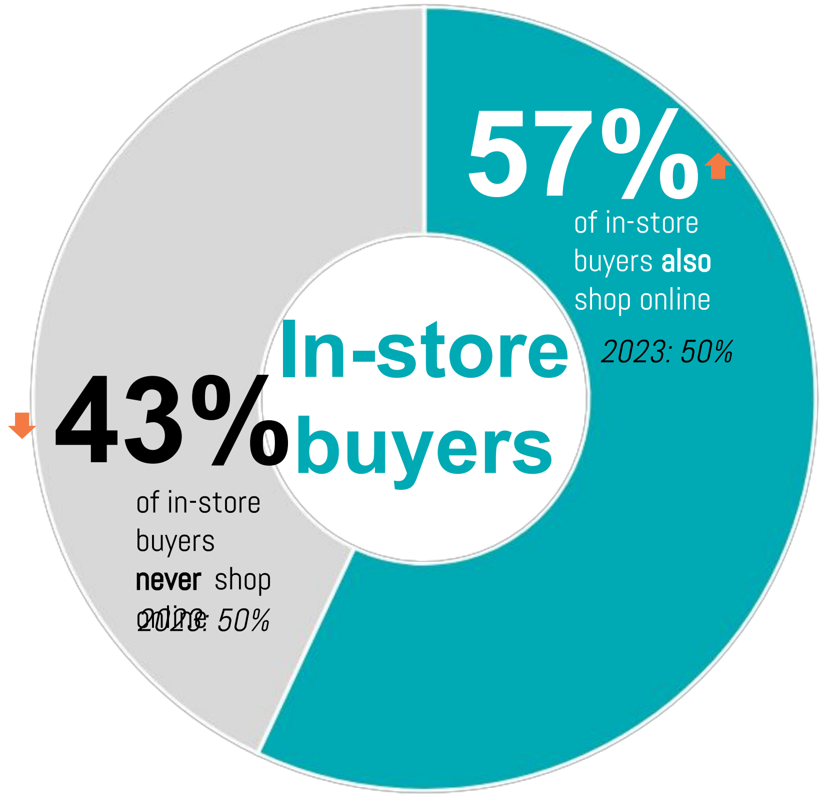
In-Store buyers are increasingly integrating online shopping into their behavior, suggesting that the chosen channel varies based on specific needs or occasions.

Do they ever go online when shopping for alcoholic beverages?

among frequent in-store buyers (who go in-store often or always when shopping for alcoholic beverages)



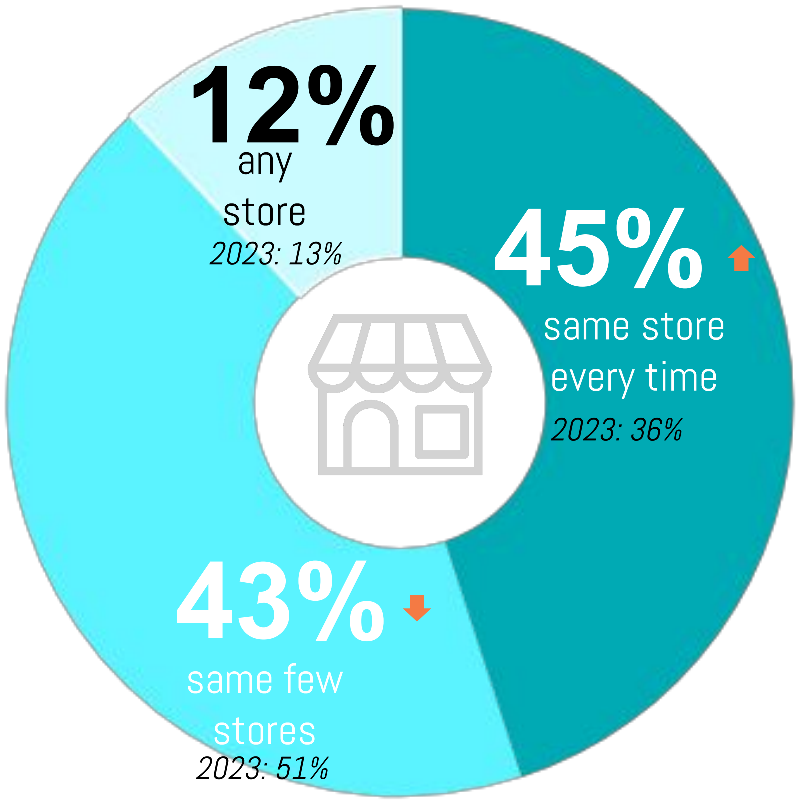
Data Source: 2024 BACi Consumer Study
Q410. How frequently do you go online or to a physical store to shop when you're thinking about buying [INSERT CATEGORY]? *Base: Shop in-store often / always for bev alc, 2024, n=918. 2023, n=1,081.*

Statistically significant differences at the 95% confidence level:
Higher or lower vs 2023

Loyalty to the chosen store for purchasing alcoholic drinks has grown over the past year, indicating a decreased openness to alternatives.

Do they typically go to same or different stores when shopping in-store for alcoholic beverages?

among frequent in-store buyers (who go in-store often or always when shopping for alcoholic beverages)



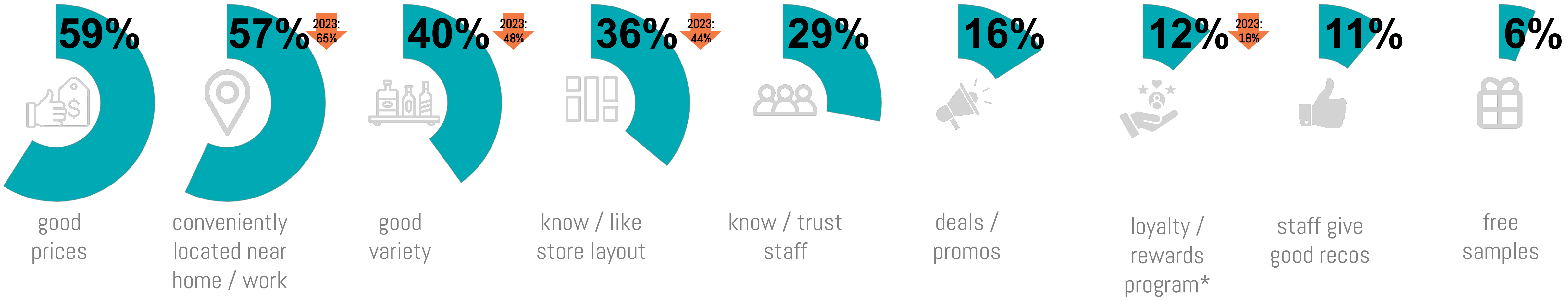
Data Source: 2024 BACi Consumer Study.
Q415. When making a [INSERT CATEGORY] purchase in a physical store, do you typically…? *Base: Shop in-store often / always for bev alc, 2024, n=918. 2023, n=1,081.*

Statistically significant differences at the 95% confidence level:
Higher or lower vs 2023

The primary reasons driving store preference is the perception of offering good prices and convenience, suggesting that brands providing an optimal value equation and location will attract more shoppers.

Why go to the same store(s)?

among frequent in-store buyers



"Other" response option selected by 3% of respondents; not shown in above chart.
Data Source: 2024 BACi Consumer Study.
Q420. Why do you go back to the same physical store(s) when purchasing [INSERT CATEGORY]? *Please select all that apply. Base: shops at one or a few physical stores, and shops in-store often / always, 2024, n=792. 2023, n=932.*

Statistically significant differences at the 95% confidence level:
Higher or lower than 2023
Higher than all other alc bev types

Overall, reasons for seeking alternative stores appear to be shifting, as shoppers appear less inclined to explore. However, location and more attractive deals remain the top considerations.

Why go to different store(s)?

among frequent in-store buyers

59% 2023: 65%

convenient location

41%

go to store with best price / deal

25% 2023: 33%

different stores for different needs

11% 2023: 16%

like to try new stores

"Other" response option selected by 1% of respondents; not shown in above chart.
Data Source: 2024 BACi Consumer Study.
Q425. What makes you choose one physical store over another when purchasing [INSERT CATEGORY]? *Please select all that apply. Base: shops at many physical stores, and shops in-store often / always, 2024, n=515, 2023, n=704.*

General shopping behaviors: online

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Most Online buyers continue to shop in-store, indicating that In-Store buyers are increasingly adopting cross-channel shopping behaviors, as mentioned previously.

Do they ever go in-store when shopping for alcoholic beverages?

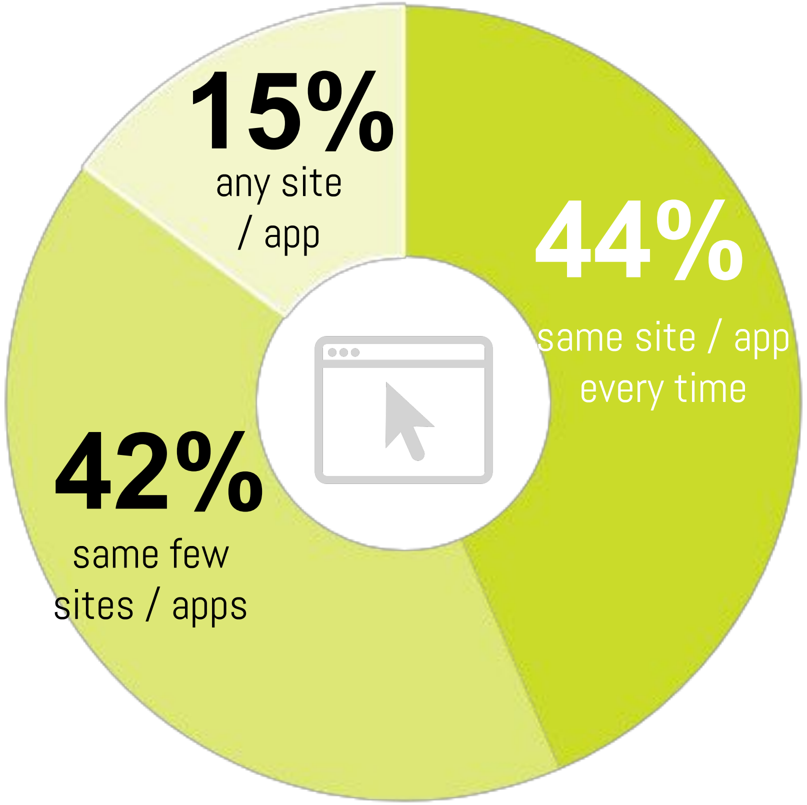
among frequent online buyers (who go online often or always when shopping for alcoholic beverages)

Data Source: 2024 BACi Consumer Study.
Q410. How frequently do you go online or to a physical store to shop when you're thinking about buying [INSERT CATEGORY]? *Base: shop online often / always for bev alc, 2024, n=212. 2023, n=163.*

4 out of 10 Online buyers remain loyal to their preferred sites, while the remainder are open to switching.

Do they typically go to same or different stores when shopping online for alcoholic beverages ?

among frequent online buyers (who go online often or always when shopping for alcoholic beverages)

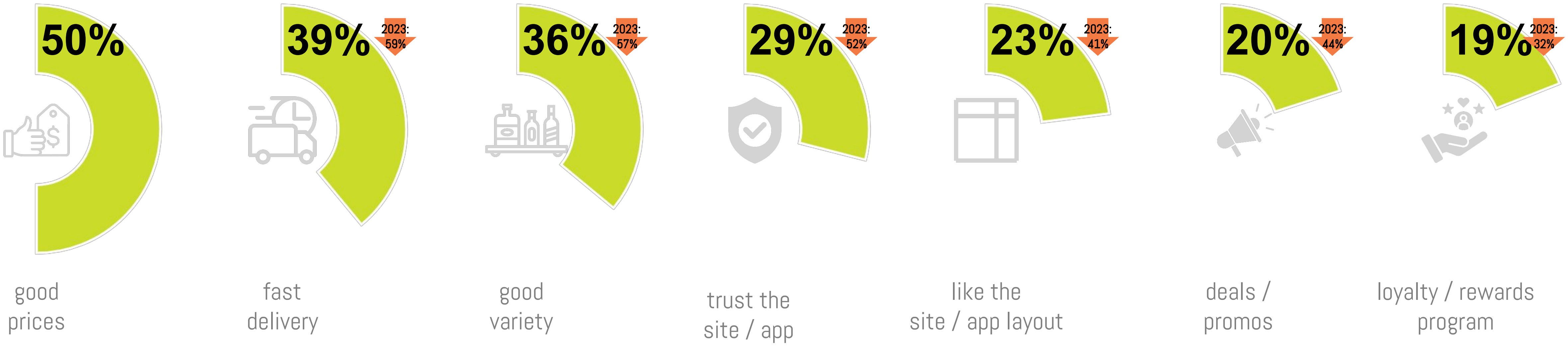


Data Source: 2024 BACi Consumer Study.
Q435. When making a [INSERT CATEGORY] purchase **online**, do you typically...? *Base: shop online often / always for alcoholic beverages, 2024, n=212. 2023, n=163.*

In 2024, most added-value features from online retailers are becoming less relevant, with good prices remaining the primary factor for preference, posing a risk of commoditization.

Why go to the same website(s) / app(s)?

among frequent online buyers

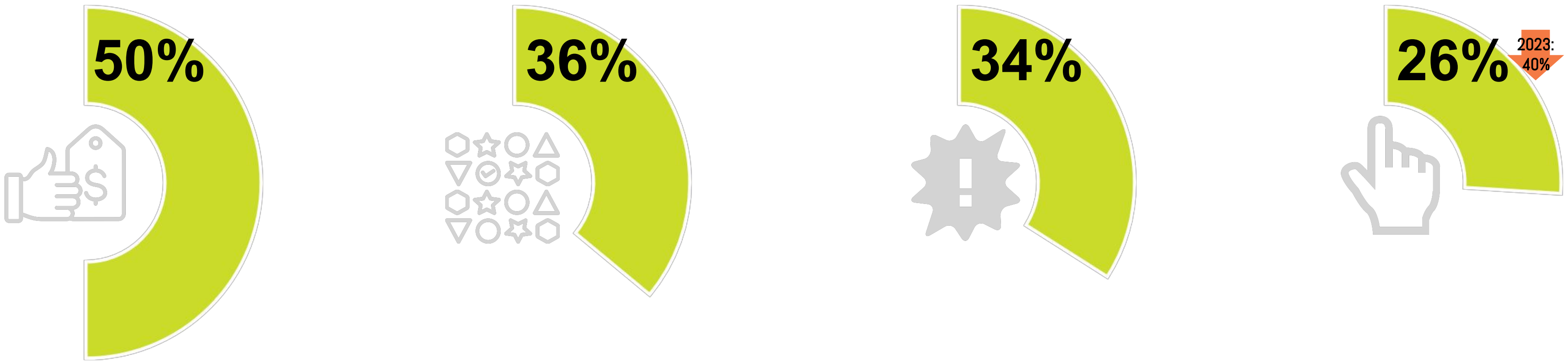


* "Other" response option selected by <1% of respondents; not shown in above chart.
Data Source: 2024 BACi Consumer Study.
Q440. Why do you go back to the same online retailers/websites/apps when purchasing [INSERT CATEGORY]? *Please select all that apply. Base: shops at one or a few websites / apps, and shop online often / always, 2024, n=147. 2023, n=141.*

Consequently, the primary reason for switching online retailers is if the new option provides better prices.

Why go to different website(s) / app(s)?

among frequent online buyers



go to site / app with best price / deal

different sites for different needs

like to try new websites / apps

click one of the top links when searching for product

"Other" response option selected by 1% of respondents; not shown in above chart. **Sample size is n<100; interpret results directionally and with caution.*
Data Source: 2024 BACi Consumer Study.
Q445. What makes you choose one online retailer/website/app over another when purchasing [INSERT CATEGORY]? *Please select all that apply. . Base: shops at a few or many websites / apps, and purchase online often / always, 2024, n=96*. 2023, n=84*.*

Behavioral changes

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The proportion of Online buyers who have changed their preferred stores has decreased over the past year. In-Store buyers who have switched are being persuaded by different strategies similarly.

In-store buyers

% who changed preferred stores in past 6 months

What store preferences changed for frequent in-store buyers?

among those who have changed preferred stores in past 6 months

Online buyers

% who changed preferred stores in past 6 months

What store preferences changed for frequent online buyers?

among those who have changed preferred stores in past 6 months

Data Source: 2024 BACi Consumer Study. *Base: shop online often / always for alcoholic beverages, 2024, n=212. 2023, n=163. Shop in-store often / always for alcoholic beverages, 2024, n=918. 2023, n=1,081*
"Other" response option selected by 1% of respondents; not shown in above chart
Q500. How have your preferred store(s)/retailer(s) when shopping for [INSERT CATEGORY] changed in the last 6 months, if at all? *Base: shop online often / always and changed store preferences in past 6 months, 2024, n=109. 2023, n=161. Shop in-store often / always and changed store preferences in past 6 months, 2024, n=256. 2023, n=329.*

Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

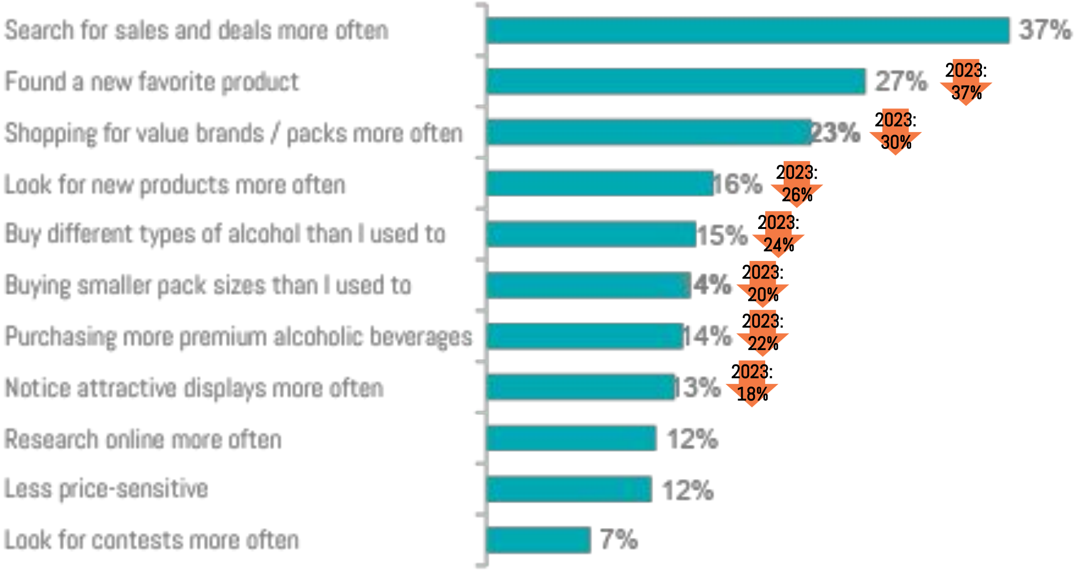
Although several shoppers believe they have changed their behaviors in the past 6 months, when having a closer look to the activities it is seen that deal-seeking behavior remains high.

In-store buyers

% who changed shopping behavior in past 6 months

What shopping behavior changed for In-store buyers?

among those who have changed shopping behavior in past 6 months

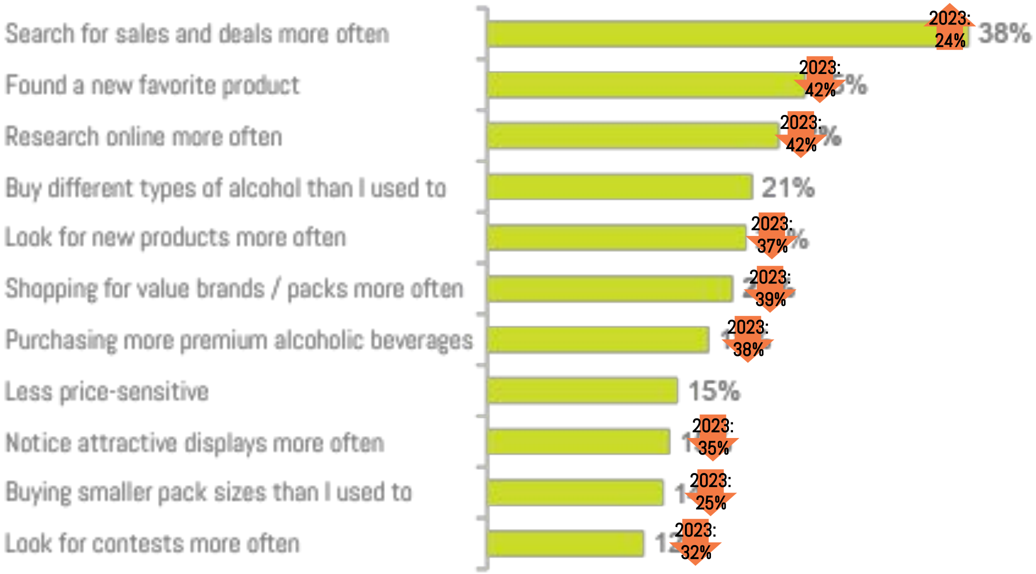


Online buyers

% who changed shopping behavior in past 6 months

What shopping behavior changed for online buyers?

among those who have changed shopping behavior in past 6 months



Data Source: 2024 BACi Consumer Study. *Base: shop online often / always for alcoholic beverages, 2024, n=212. 2023, n=163. Shop in-store often / always for alcoholic beverages, 2024, n=918. 2023, n=1,081*

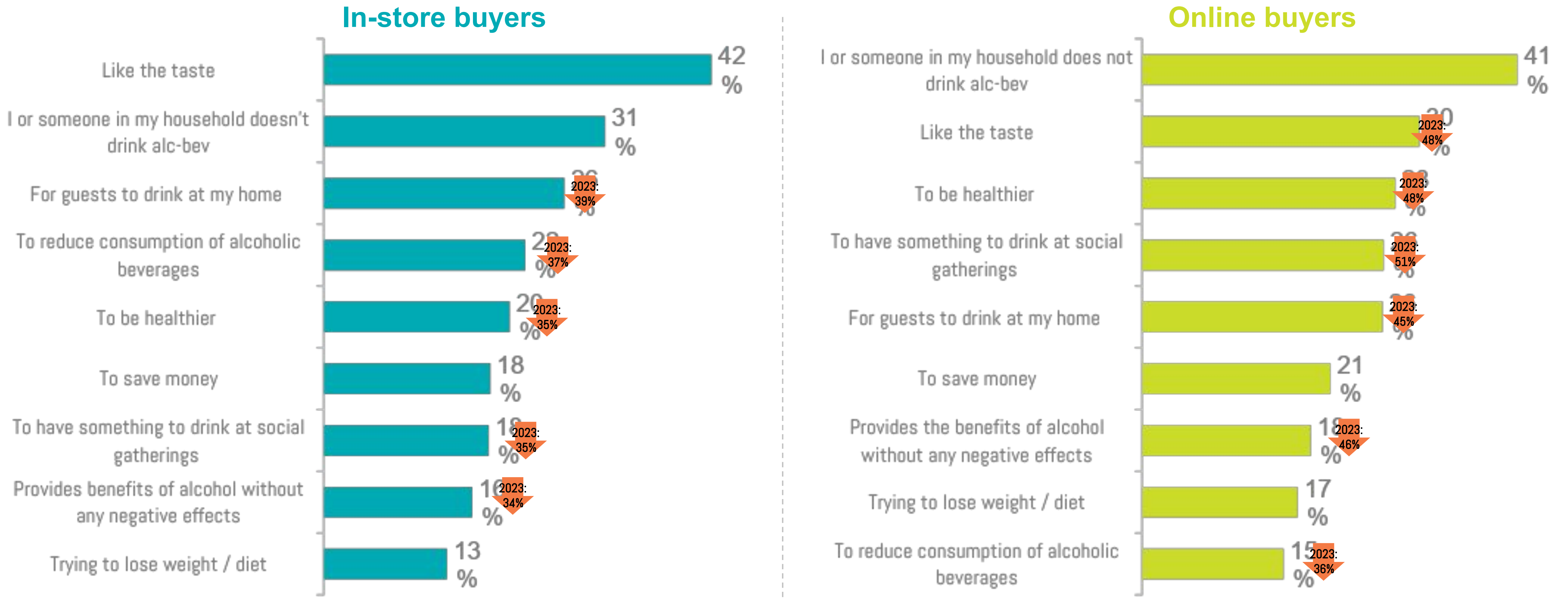
"Other" response option selected by 1% of respondents; not shown in above chart

Q505. How have your shopping habits changed when making a purchase of alcoholic beverages within the last 6 months, if at all? *Base: shop online often / always and changed shopping behavior in past 6 months, 2024, n=xx. 2023, n=142. Shop in-store often / always and changed store preferences in past 6 months, 2024, n=xx. 2023, n=733.*

Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

The reasons for purchasing non-alcoholic drinks have diminished compared to last year, with the primary motivations now centered around taste and living with someone who abstains from alcohol.

Reasons for purchasing non-alcoholic beverages



Average # of reasons for purchasing non-alcoholic beverages 2024 vs 2023

In-store buyers: **2.1** | **3.0**

Online buyers: **2.3** | **3.6**

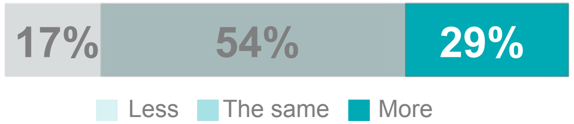
Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

Data Source: 2024 BACi Consumer Study. *Base: shop online often / always for alcoholic beverages, 2024, n=97*. 2023, n=102. Shop in-store often / always for alcoholic beverages, 2024, n=249. 2023, n=238*
Q400C. Why do you purchase non-alcoholic beer / wine / cocktails / spirits? *Please select all that apply*

In-Store buyers believe they are spending more on alcoholic drinks in 2024, with the primary reason being the rise in prices for these products.

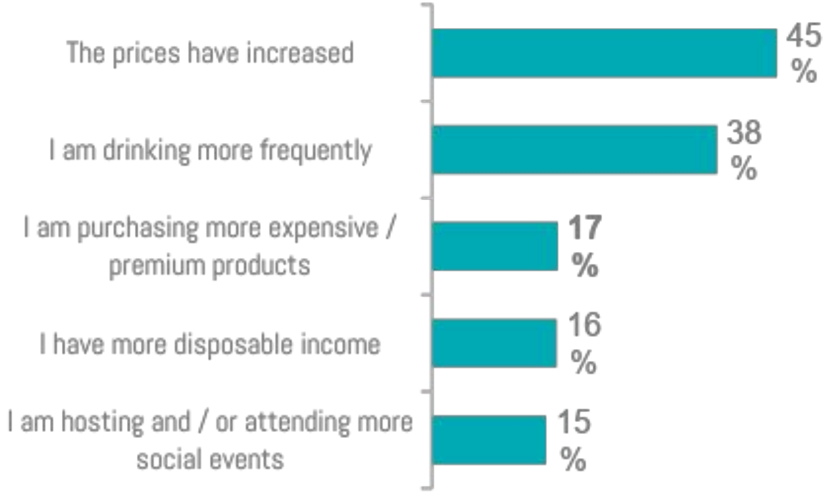
In-store buyers

How much are you spending on alcoholic beverages in 2024?



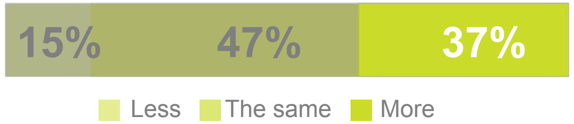
Why are you spending more?

among those who are spending more in 2024



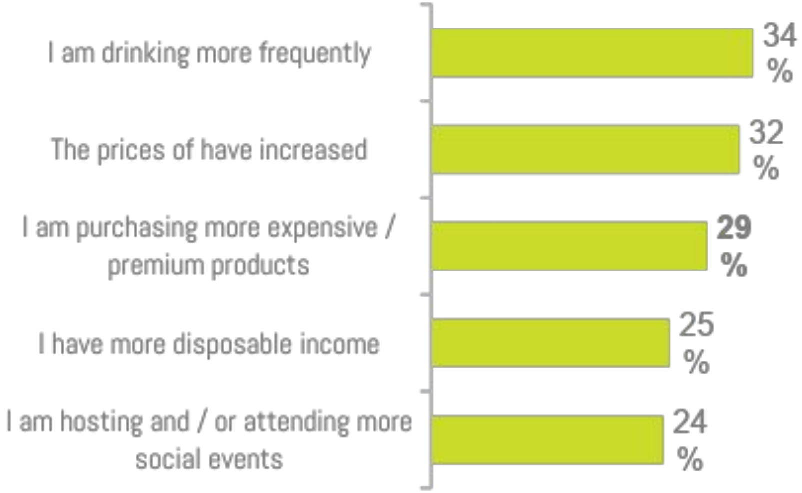
Online buyers

How much are you spending on alcoholic beverages in 2024?



Why are you spending more?

among those who are spending more in 2024



New questions added in 2024. Data Source: 2024 BACi Consumer Study.

Q500A. Which of the following best describes how much you are spending on [insert category from S3 / selected cell] in 2024? *Base: shop online often / always for alcoholic beverages, 2024, n=212. Shop in-store often / always for alcoholic beverages, 2024, n=905.*

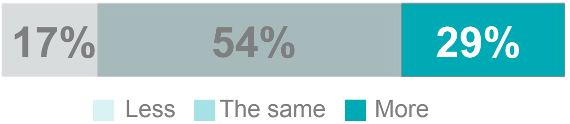
Q500B. Why are you spending more on [insert category from S3 / selected cell] in 2024? *Base: shop online often / always for alcoholic beverages, 2024, n=74*. Shop in-store often / always for alcoholic beverages, 2024, n=261.*

Statistically significantly higher vs. other group(s) at the 95% confidence level

On the other hand, two out of ten consumers report spending less on alcoholic drinks due to reduced disposable income and lower drinking frequency.

In-store buyers

How much are you spending on alcoholic beverages in 2024?

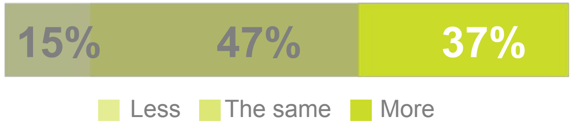


Why are you spending less?

among those who are spending less in 2024

Online buyers

How much are you spending on alcoholic beverages in 2024?



Why are you spending less?

among those who are spending less in 2024

New questions added in 2024. Data Source: 2024 BACi Consumer Study.

Q500A. Which of the following best describes how much you are spending on [insert category from S3 / selected cell] in 2024? *Base: shop online often / always for alcoholic beverages, 2024, n=212. Shop in-store often / always for alcoholic beverages, 2024, n=905.*

Q500C. Why are you spending less on [insert category from S3 / selected cell] in 2024?. *Base: shop online often / always for alcoholic beverages, 2024, n=36*. Shop in-store often / always for alcoholic beverages, 2024, n=167.*

Engaging with new products

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The number of sources shoppers use to discover new products has decreased, potentially indicating reduced attentiveness. The store remains the primary source for product information.

How do you learn about new products?

In-store buyers

	2024	
in-store	50%	2023: 60%
word-of-mouth	33%	2023: 47%
TV ads	24%	2023: 29%
Google	15%	
social media ads	14%	2023: 23%
ordering drinks at restaurants, bars, hotels, sports games, concerts, etc.	13%	2023: 18%
Average # sources used to learn about new product 2024 VS 2023	*1.9*	*3.2*

Online buyers

	2024	
in-store	35%	
searches on Google / web browsers	25%	2023: 37%
word-of-mouth	25%	2023: 36%
TV ads	22%	2023: 34%
searches on brand / product sites	21%	2023: 38%
searches on retailer websites	19%	2023: 33%
Average # sources used to learn about new product 2024 VS 2023	*2.8*	*5.6*

|Data Source: 2024 BACi Consumer Study.
Q400. How do you typically find out about new [INSERT CATEGORY] products? *Please select all that apply. Base: shop online often / always for alcoholic beverages, 2024, n=212. 2023, n=163. Shop in-store often / always for alcoholic beverages, 2024, n=918. 2023, n=1,081.*

Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

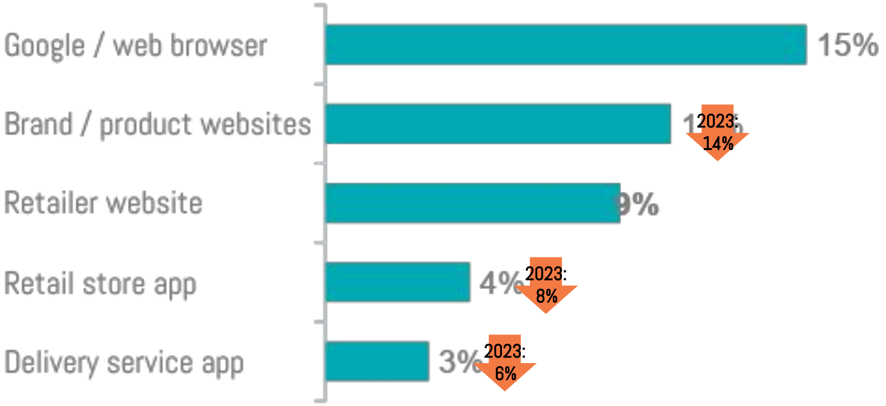
Searching by alcohol type has become the primary method for discovering new products, surpassing brand searches. Additionally, searching by cocktail has become less relevant.

In-store buyers

Where do you start your online search for new products ?

	2024	
search by type of alcohol	47%	2023: 36%
search by brand	44%	
search by mixed drink / cocktail	8%	2023: 18%

Where do you search for new products online?

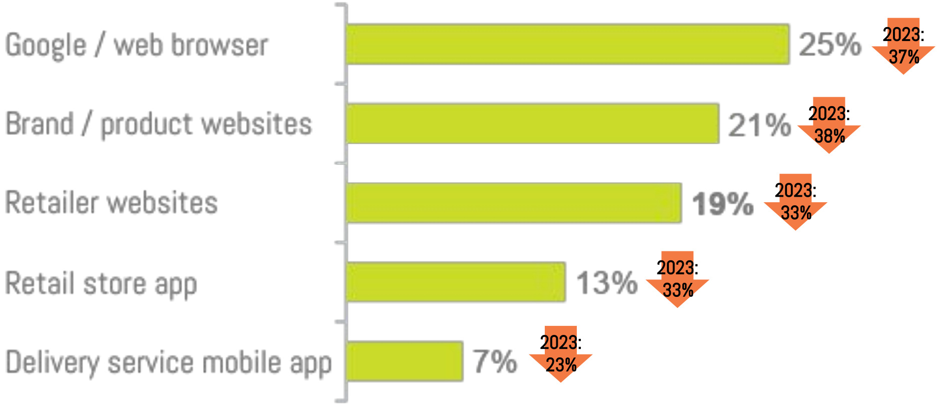


Online buyers

Where do you start your online search for new products ?

	2024	
search by type of alcohol	48%	2023: 26%
search by brand	43%	
search by mixed drink / cocktail	8%	2023: 25%

Where do you search for new products online?

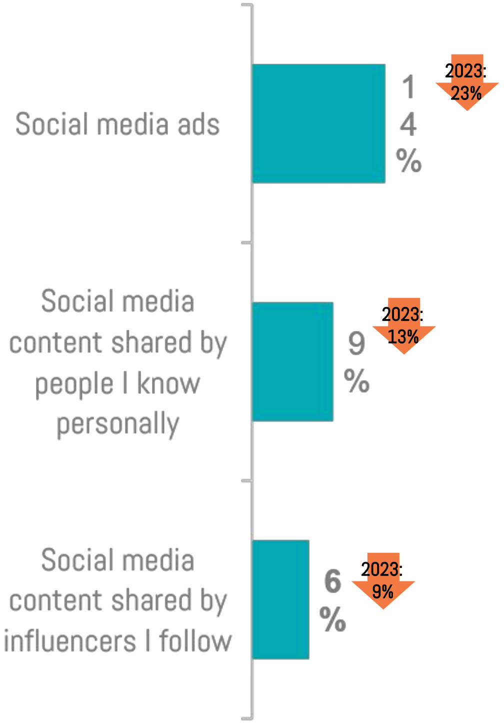


"Other" response option selected by 1% of respondents; not shown in above chart for Q401.
Data Source: 2024 BACi Consumer Study.
Q400. How do you typically find out about new [INSERT CATEGORY] products? *Base: shop online often/always for alcoholic beverages, 2024, n=212. 2023, n=163. Shop in-store often / always for alcoholic beverages, 2024, n=918. 2023, n=1,081.*
Q401. When searching for new [INSERT CATEGORY] products online/on an app, how do you typically **start** your search? *Base: shop online often/always for alc bev and search for new products, 2024, n=97*. 2023, n=113. Shop in-store often/always for alc bev and search for new products, 2024, n=248. 2023, n=304.*

Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

Social media's role in discovering new products has declined, with Instagram, Twitter (X) and Threads showing the most significant reduction in relevance for both In-Store and Online shoppers.

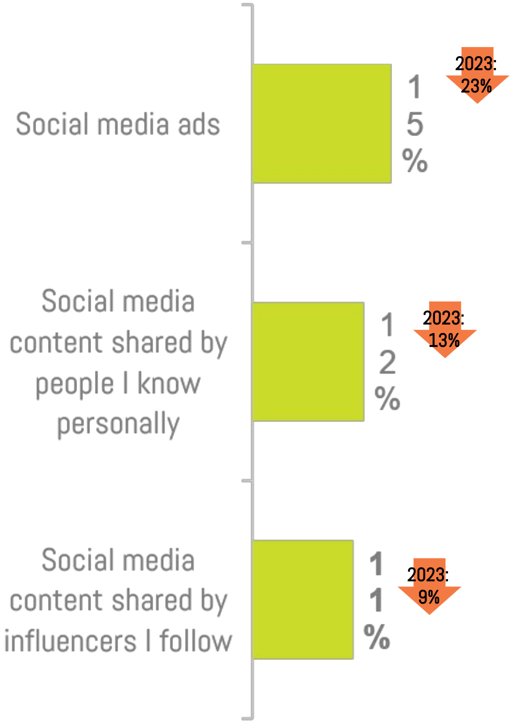
How frequent in-store buyers learn about new products on social media



On which social media apps do frequent in-store buyers learn about new products?

	2024	
Facebook	74%	
Instagram	50%	2023: 59%
YouTube	50%	
TikTok	41%	
Twitter	24%	2023: 35%
Pinterest	18%	
Snapchat	17%	
Threads	7%	2023: 13%
Tumblr	4%	

How online buyers learn about new products on social media



On which social media apps do online buyers learn about new products?

	2024	
Facebook	84%	
YouTube	62%	
Instagram	51%	2023: 84%
TikTok	49%	
Twitter	34%	2023: 76%
Snapchat	28%	2023: 48%
Pinterest	16%	
Threads	8%	2023: 25%
Tumblr	5%	

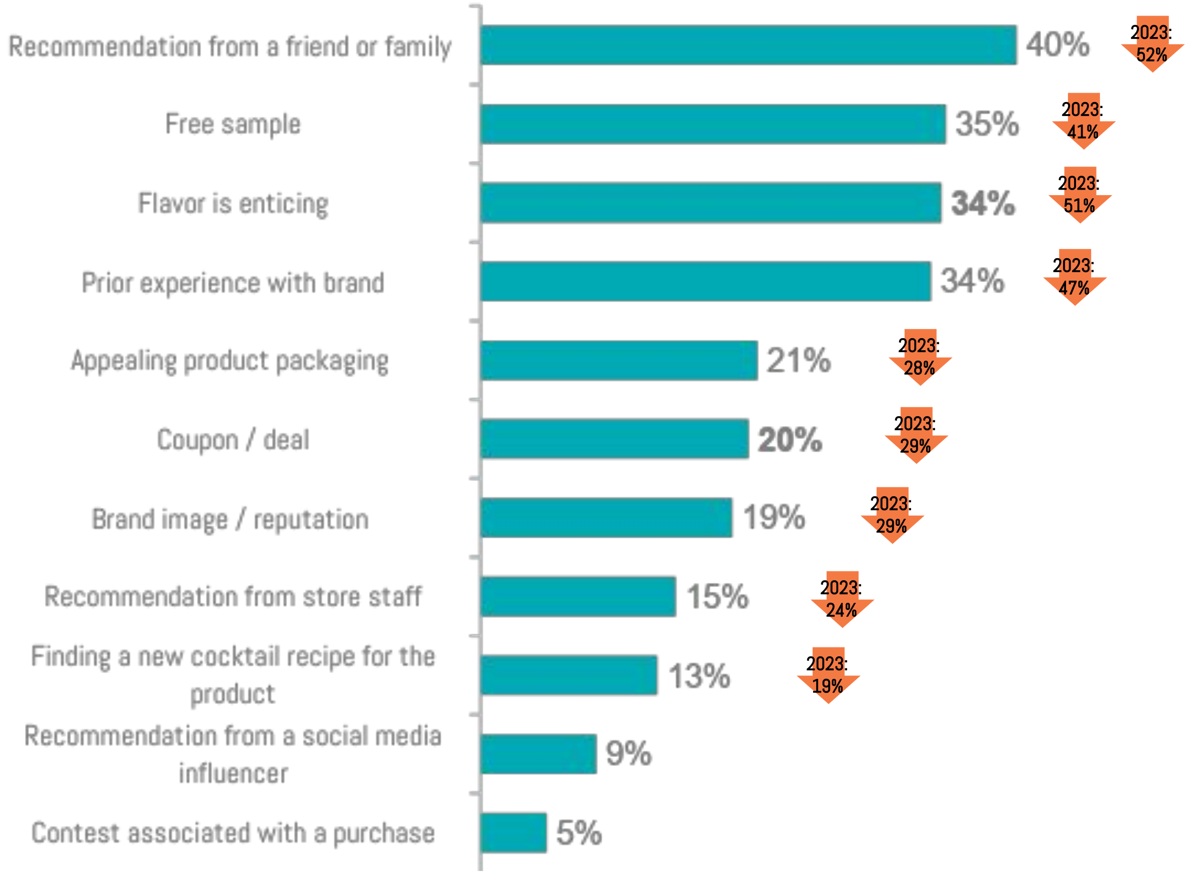
Data Source: 2024 BACi Consumer Study.
Q400. How do you typically find out about new [INSERT CATEGORY] products? *Please select all that apply. Base: shop online often / always for alcoholic beverages, 2024, n=212. 2023, n=163. Shop in-store often / always for alcoholic beverages, 2024, n=918. 2023, n=1,081*
Q400D. On which of the following social media app(s) do you find out about new [INSERT CATEGORY] products? *Base: shop online often / always for alcoholic beverages and use social media to learn about new products, 2024, n=60*. 2023, n=86*. Shop in-store often / always for alcoholic beverages and use social media to learn about new products, 2024, n=229. 2023, n=340.*

Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

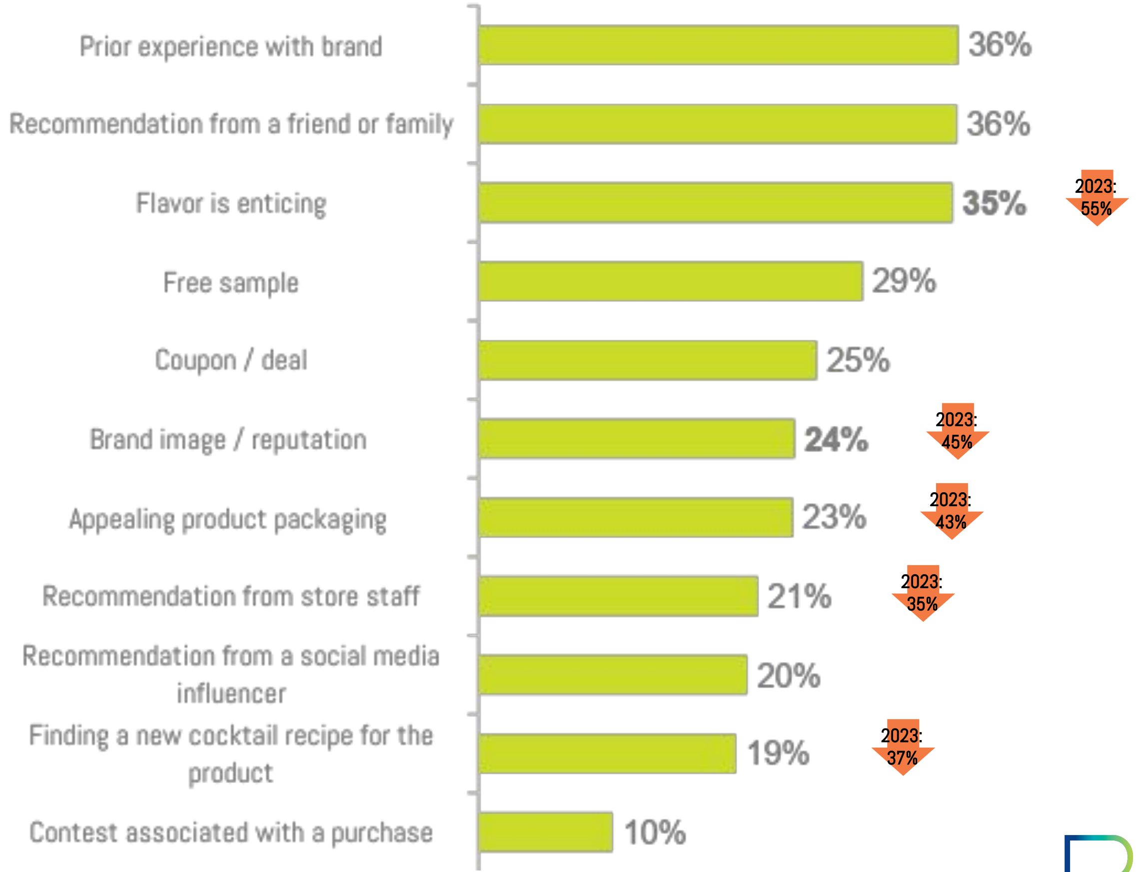
The factors motivating shoppers to try new products are diminishing in 2024, reflecting a less exploratory mindset among consumers.

What makes you want to try a new product?

In-store buyers



Online buyers



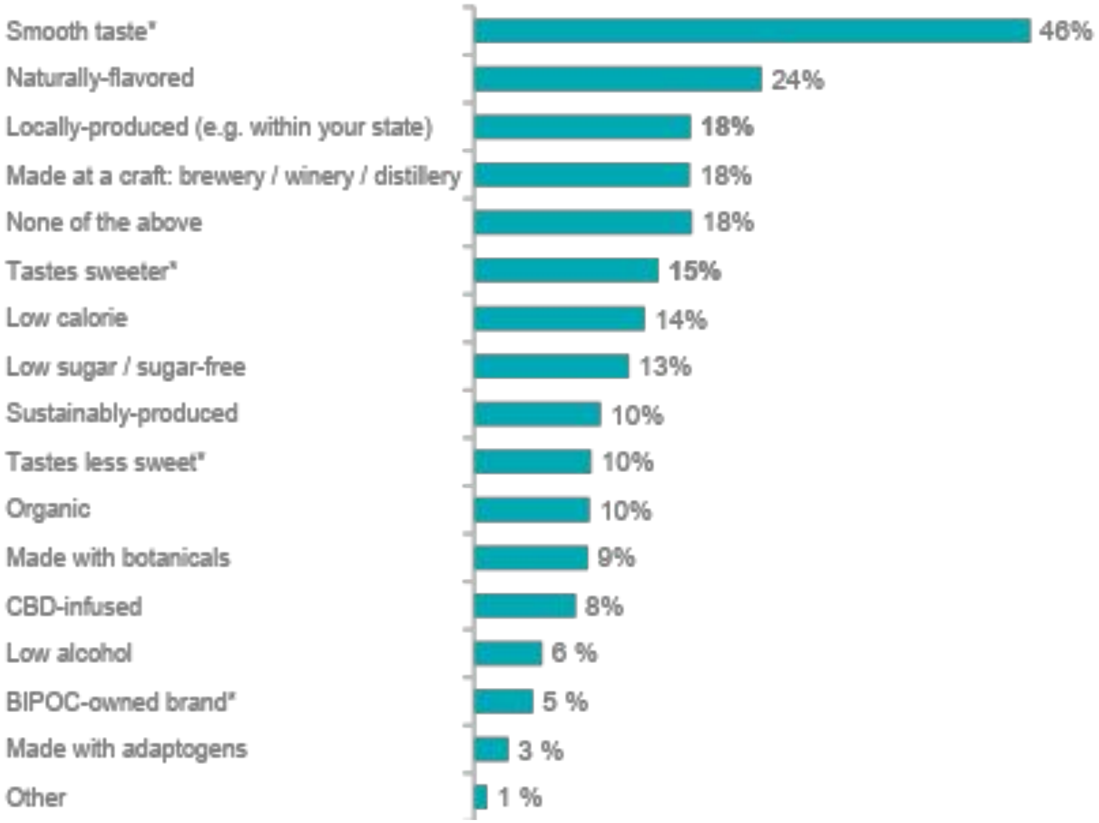
"Other" response option selected by 1% of respondents; "None of the above" selected by 4% of respondents; not shown in above chart
Data Source: 2024 BACi Consumer Study. *Base: shop online often / always for alcoholic beverages, 2024, n=212. 2023, n=163. Shop in-store often / always for alcoholic beverages, 2024, n=918. 2023, n=1,081.*
Q405. Which of the following would make you want to try a new [INSERT CATEGORY] product? *Please select all that apply.*

Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

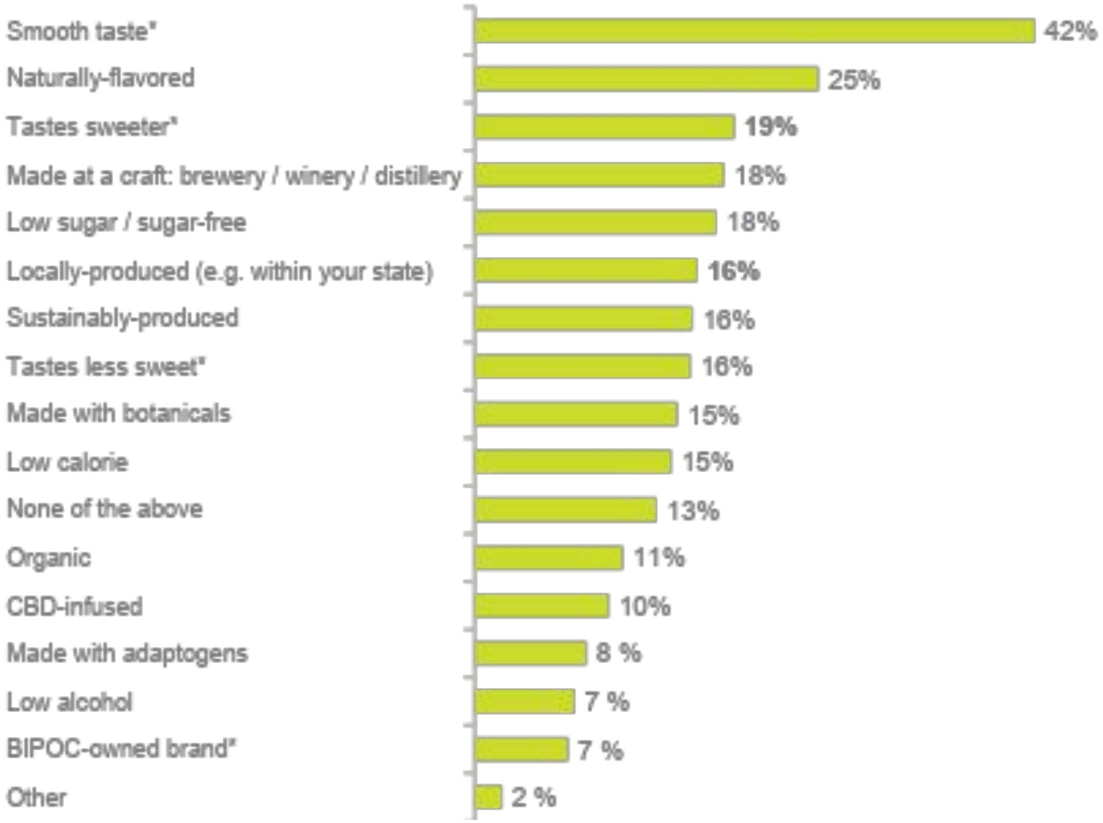
The most effective statement to motivate both In-Store and Online consumers to try a new product is emphasizing ‘smooth taste’.

What marketing claims would motivate you to purchase a new product?

In-store buyers



Online buyers

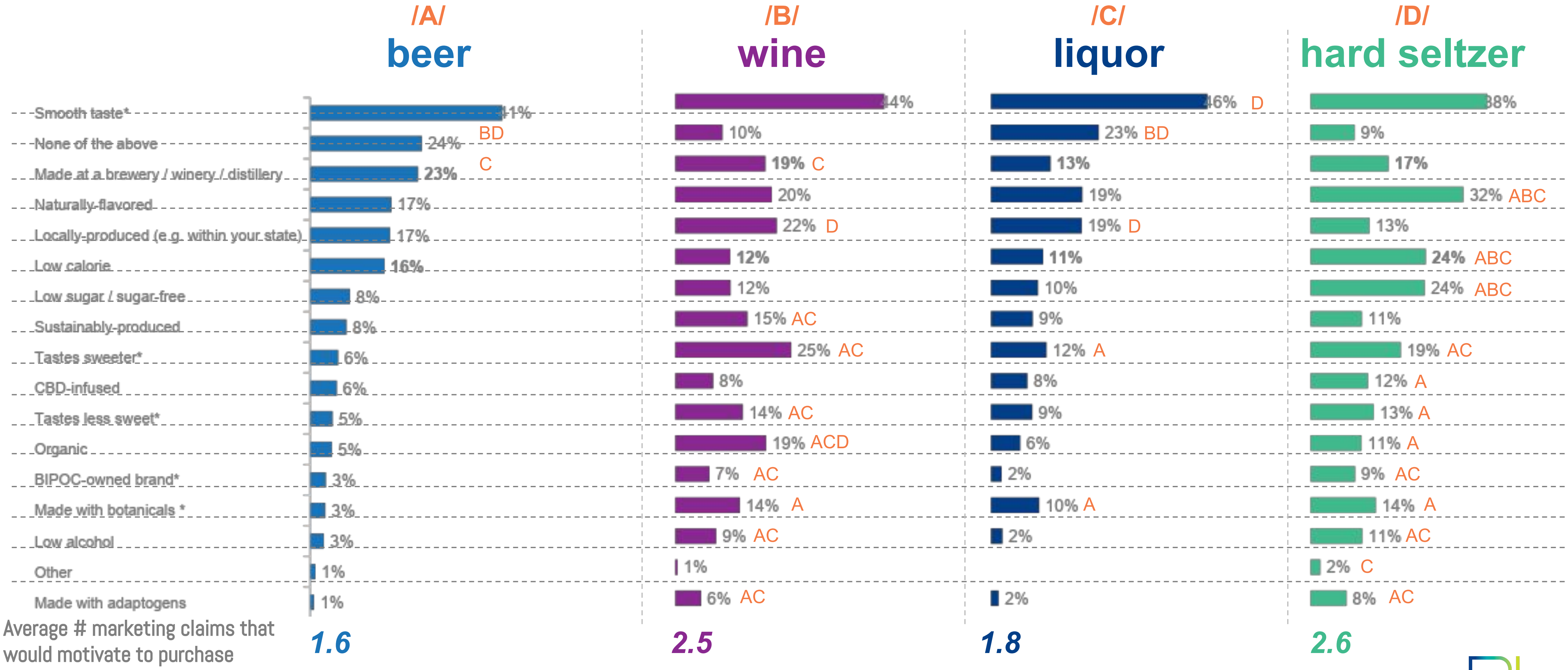


Statistically significant differences at the 95% confidence level:
⬆ Higher or lower than 2023

“Smooth taste”, “Tastes sweeter”, “Tastes less sweet”, “BIPOC-owned brand” added as a new response options in 2024. Not directly comparable with 2023 results due to changes in the question.
Data Source: 2024 BACi Consumer Study. *Base: shop online often / always for alcoholic beverages, 2024, n=212. Shop in-store often / always for alcoholic beverages, 2024, n=918.*
Q455. Which of the following types of marketing claims (e.g. on a product website, in an ad, on a sign, etc.) would motivate you to purchase a new type of [INSERT CATEGORY]?

Across different categories ‘smooth taste’ remains the key marketing claim. Hard Seltzer and wine consumers seem more complex due to the number of messages that would persuade them.

What marketing claims would motivate you to purchase a new product?



“Smooth taste”, “Tastes sweeter”, “Tastes less sweet”, “BIPOC-owned brand” added as a new response options in 2024. Not directly comparable with 2023 results due to changes in the question.

Data Source: 2024 BACi Consumer Study. *Base: Beer buyers, 2024, n=313.. Seltzer buyers, 2024, n=313.. Wine buyers, 2024, n=312.. Liquor buyers, 2024, n=312.*

Q455. Which of the following types of marketing claims (e.g. on a product website, in an ad, on a sign, etc.) would motivate you to purchase a new type of [INSERT CATEGORY]?

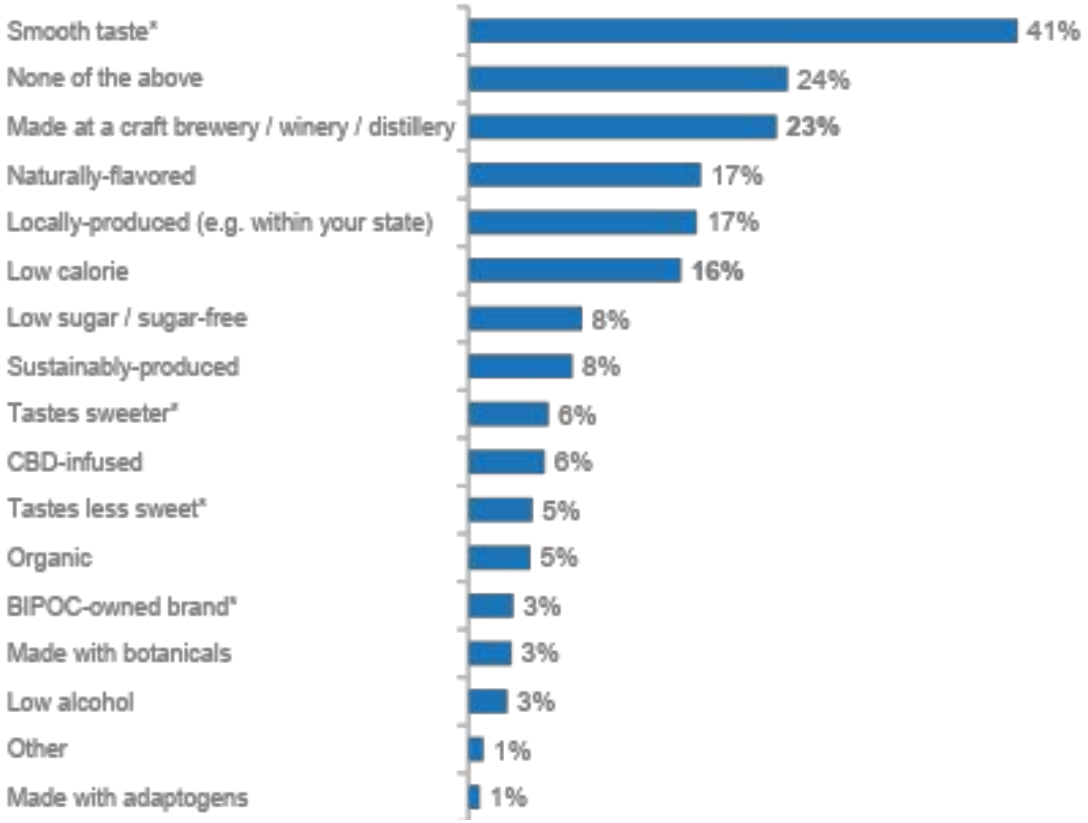
Q456. *Are there any other marketing claims that would motivate you to purchase a new type of [insert category from S3 / selected cell]?*

Statistically significant differences at the 95% confidence level:
Higher or lower between categories A, B, C and D

Beer consumers favor bold, unique and refreshing flavors while also appreciating smoothness and sweetness. The trend towards natural ingredients and local production, reflects a preference for authenticity and quality.

What marketing claims would motivate you to purchase a new product?

beer



Are there any other marketing claims that would motivate you to purchase a new type of product?

Verbatims related to 'Smooth taste'

- "Smooth and refreshing"
- "Sweet smooth taste"
- "Taste smother"
- "A sweet smooth taste and affordable"

Other verbatims related to 'taste'

- "A new taste with a higher volume but remaining bold and crisp"
- "Unique and strong taste"
- "Fresh tasting"
- "Made with natural flavors. Locally made"
- "Different flavors of beer"

"Smooth taste", "Tastes sweeter", "Tastes less sweet", "BIPOC-owned brand" added as a new response options in 2024. Not directly comparable with 2023 results due to changes in the question.

Data Source: 2024 BACi Consumer Study. *Base: Beer buyers, 2024, n=313.*

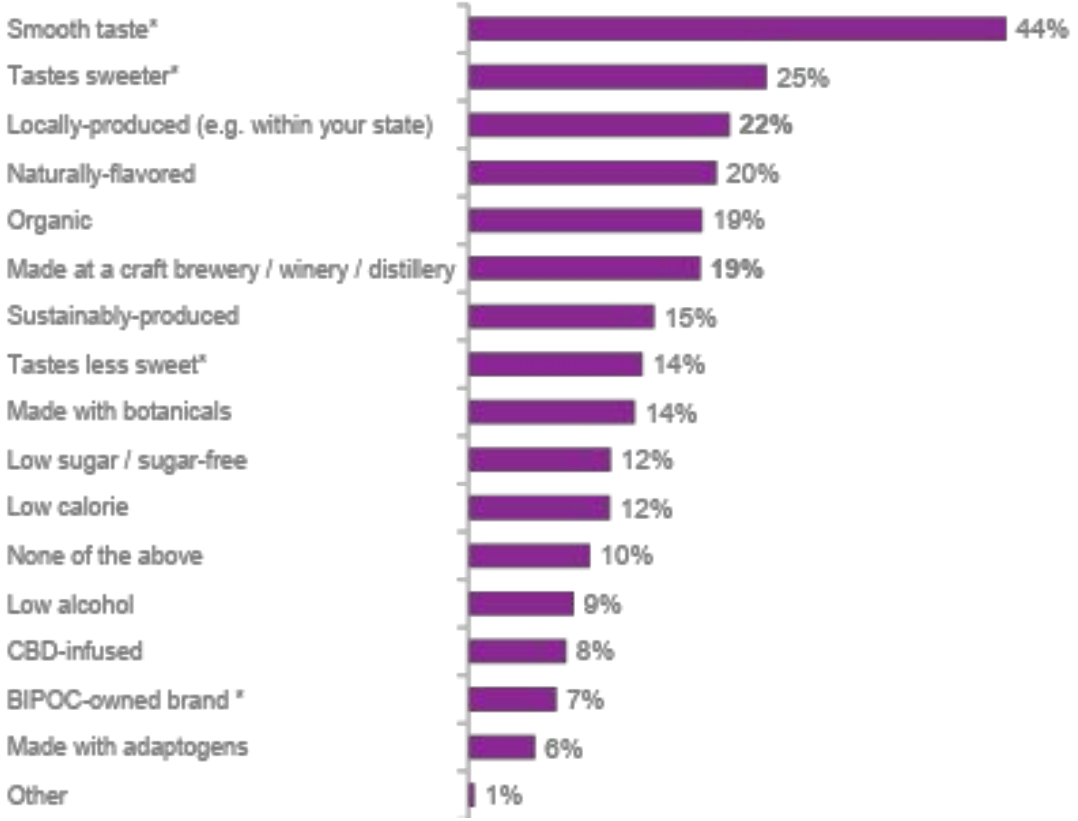
Q455. Which of the following types of marketing claims (e.g. on a product website, in an ad, on a sign, etc.) would motivate you to purchase a new type of [INSERT CATEGORY]?

Q456. *Are there any other marketing claims that would motivate you to purchase a new type of [insert category from S3 / selected cell]?*

Wine consumers prefer sweeter profiles. There is an interest in natural, organic and locally sourced ingredients reflecting broader consumer values. Additionally, some consumers are open to trying flavored wines.

What marketing claims would motivate you to purchase a new product?

wine



Are there any other marketing claims that would motivate you to purchase a new type of product?

Verbatims related to 'Smooth taste'

- "Good flavor and smooth taste"
- "No other than a reasonable price and smooth taste"

Other verbatims related to 'taste'

- "Sweeter flavor"
- "Sweet non dry flavor wine"
- "Flavored with strawberry"
- "Limited edition or rare variety or unique and exceptional flavor profile"
- "Sourced from locally grown grapes"
- "Made with real fruit"
- "I would be encouraged to buy if there were claims of organic ingredients"
- "Organically made and natural flavors"

"Smooth taste", "Tastes sweeter", "Tastes less sweet", "BIPOC-owned brand" added as a new response options in 2024. Not directly comparable with 2023 results due to changes in the question.

Data Source: 2024 BACi Consumer Study. *Base: Wine buyers, 2024, n=312.*

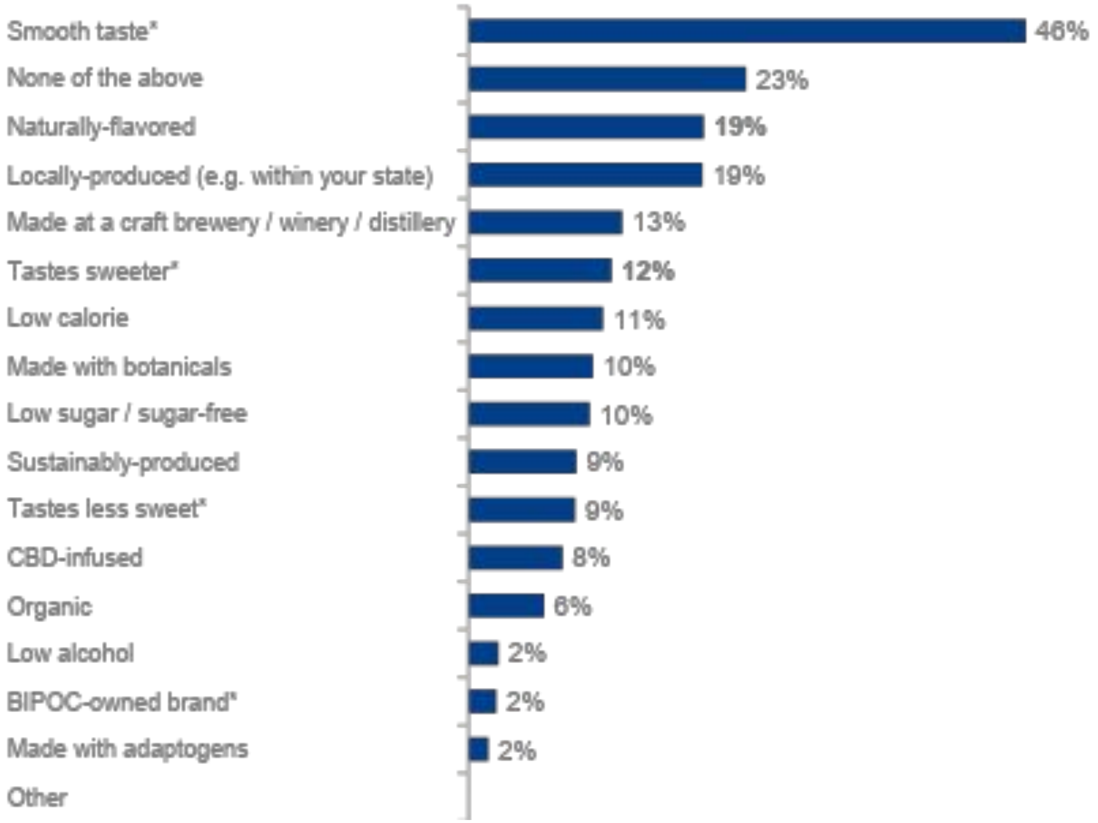
Q455. Which of the following types of marketing claims (e.g. on a product website, in an ad, on a sign, etc.) would motivate you to purchase a new type of [INSERT CATEGORY]?

Q456. *Are there any other marketing claims that would motivate you to purchase a new type of [insert category from S3 / selected cell]?*

Spirits consumers have preference for natural, smooth, and bold flavors. There is interest in organic and health-conscious options. The desire for versatility in how spirits can be enjoyed—whether straight or mixed.

What marketing claims would motivate you to purchase a new product?

liquor



Are there any other marketing claims that would motivate you to purchase a new type of product?

Verbatims related to 'Smooth taste'

- "Smooth, not harsh"
- "A sweet, smooth taste"
- "I love the product that I'm already getting because of its taste and smoothness"

Other verbatims related to 'taste'

- "Natural sweetness natural flavor"
- "Flavors that would be good straight or for a mixed drink"
- "Bold new flavor"
- "New and exciting flavors"
- "Organic and dye-free"
- "Natural sweetness, natural flavors"

"Smooth taste", "Tastes sweeter", "Tastes less sweet", "BIPOC-owned brand" added as a new response options in 2024. Not directly comparable with 2023 results due to changes in the question.

Data Source: 2024 BACi Consumer Study. *Base: Liquor buyers, 2024, n=312.*

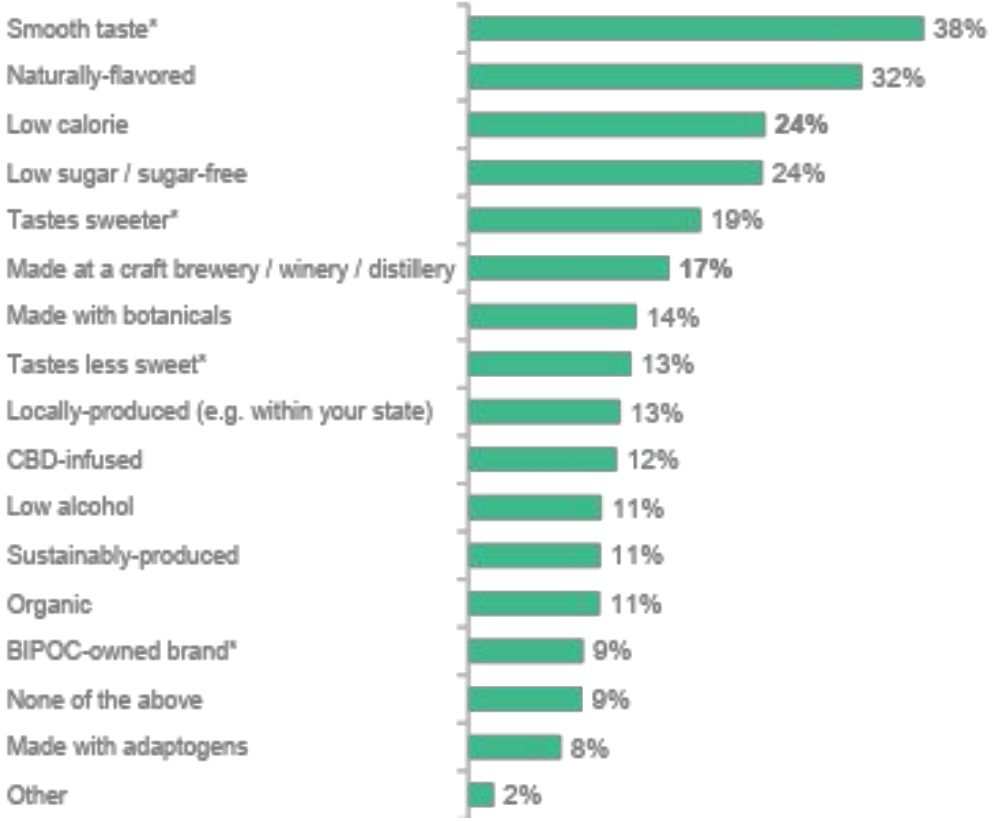
Q455. Which of the following types of marketing claims (e.g. on a product website, in an ad, on a sign, etc.) would motivate you to purchase a new type of [INSERT CATEGORY]?

Q456. *Are there any other marketing claims that would motivate you to purchase a new type of [insert category from S3 / selected cell]?*

Hard seltzer consumers exhibit a strong desire for unique, exotic flavors and health-conscious options. The interest in seasonal and limited-time offerings presents opportunities for brands to innovate and engage consumers.

What marketing claims would motivate you to purchase a new product?

seltzer



Are there any other marketing claims that would motivate you to purchase a new type of product?

Verbatims related to ‘Smooth taste’

- "Higher alcohol content but smooth drinking“
- "Less alcohol taste“
- "Tastes like water, but still gets you lightly buzzed efficiently"

Other verbatims related to ‘taste’

- "If they create anything with exotic fruit flavors I’ll buy it“
- "I like new and interesting flavor combinations"
- "Low calories and sugar“
- "Seasonal flavors would be interesting"
- "Refreshing for parties“

“Smooth taste”, “Tastes sweeter”, “Tastes less sweet”, “BIPOC-owned brand” added as a new response options in 2024. Not directly comparable with 2023 results due to changes in the question.
Data Source: 2024 BACi Consumer Study. *Base: Seltzet buyers, 2024, n=313.*
Q455. Which of the following types of marketing claims (e.g. on a product website, in an ad, on a sign, etc.) would motivate you to purchase a new type of [INSERT CATEGORY]?
Q456. *Are there any other marketing claims that would motivate you to purchase a new type of [insert category from S3 / selected cell]?*

Thank you.

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Appendices

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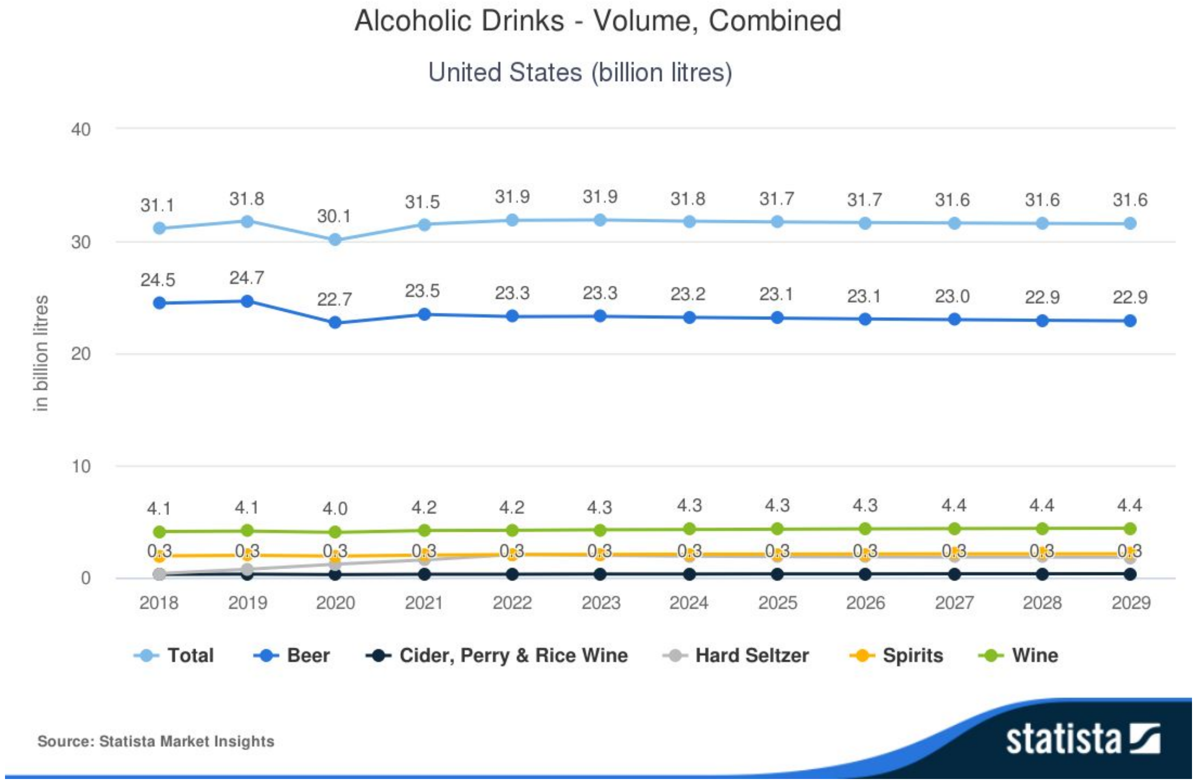
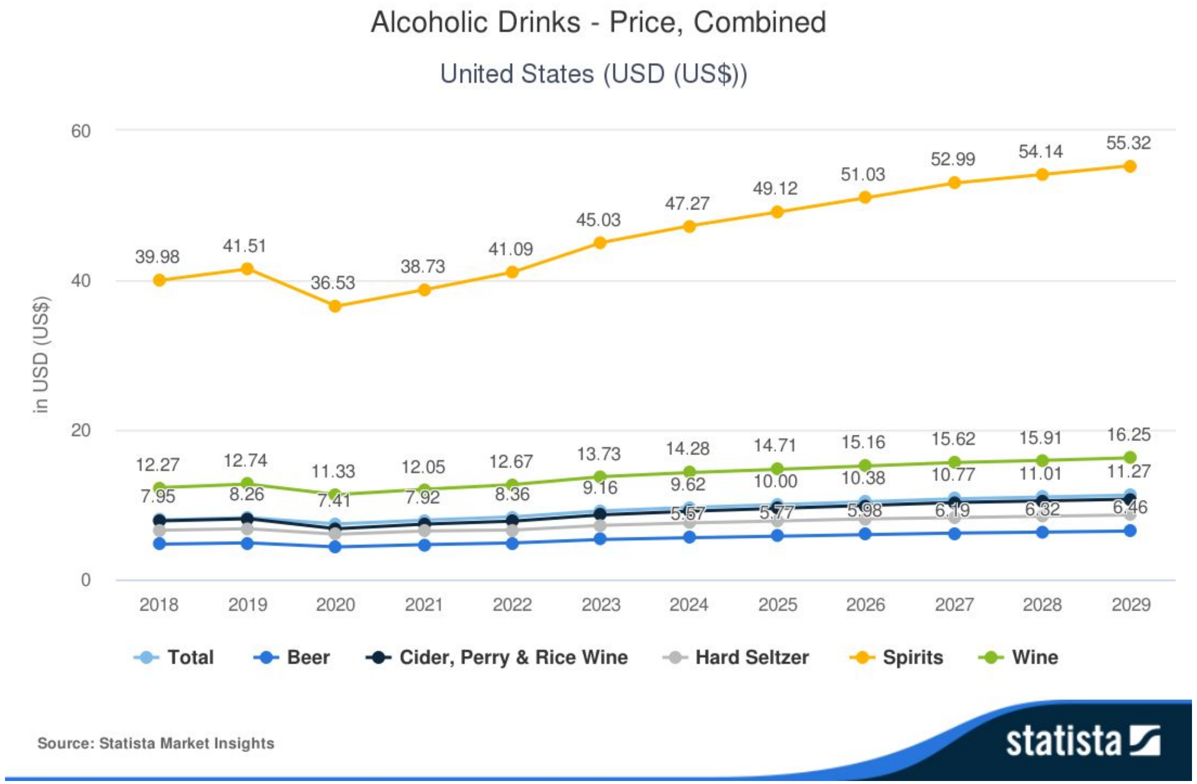
Appendix I: Market context

The alcoholic drinks industry has seen a continuous rise in prices across various categories, particularly in Spirits. Consequently, there has been a consistent decline in volume sales.

Alcoholic Drinks Market Performance

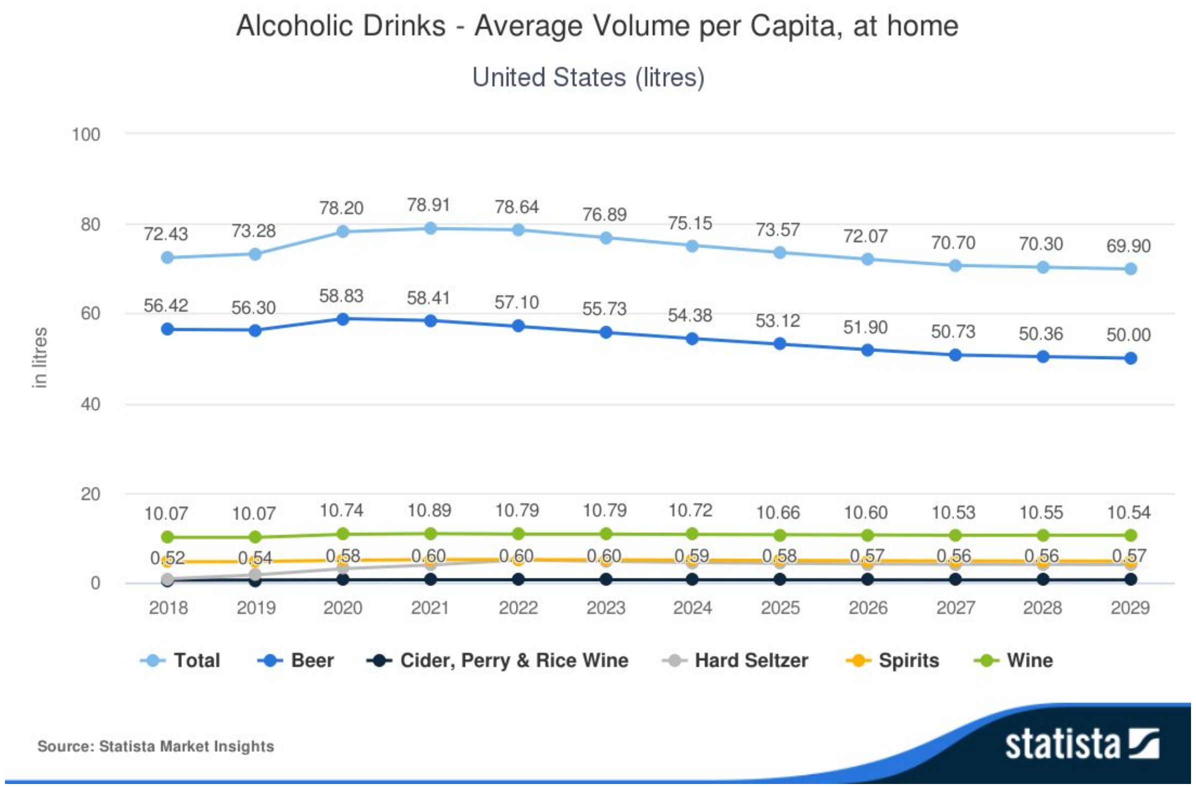


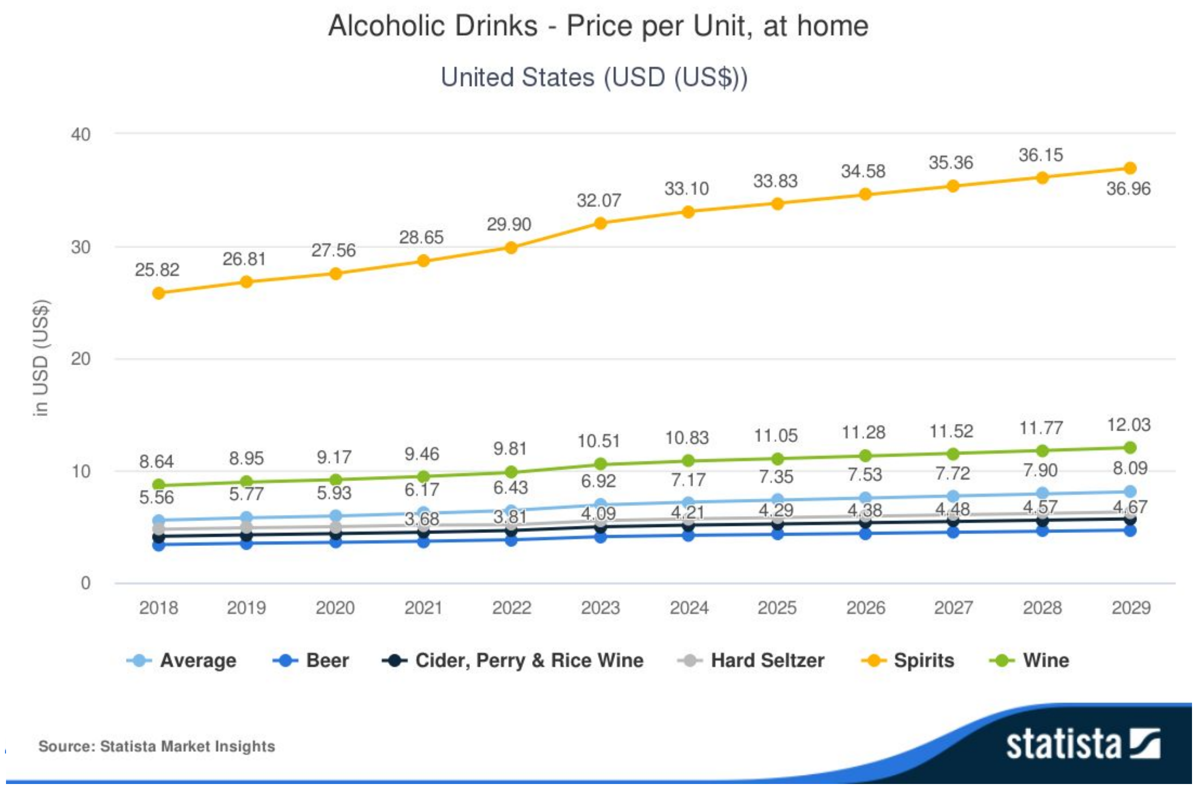


Data Source: 2024 Statista Market Forecast. Alcoholic Drinks. United States. Market Volume combines At Home and Out of Home Sales. Market sizes are determined through a Top-Down approach, building on specific predefined factors for each market segment. As a basis for evaluating markets, we use resources from the Statista platform as well as in-house market research, national statistical offices, international institutions, trade associations, companies, the trade press, and the experience of our analysts.

The decline in the overall market is primarily linked to the At-Home channel, where consumers have consistently reduced their volume of alcoholic drink purchases year over year.

Alcoholic Drinks Market Performance

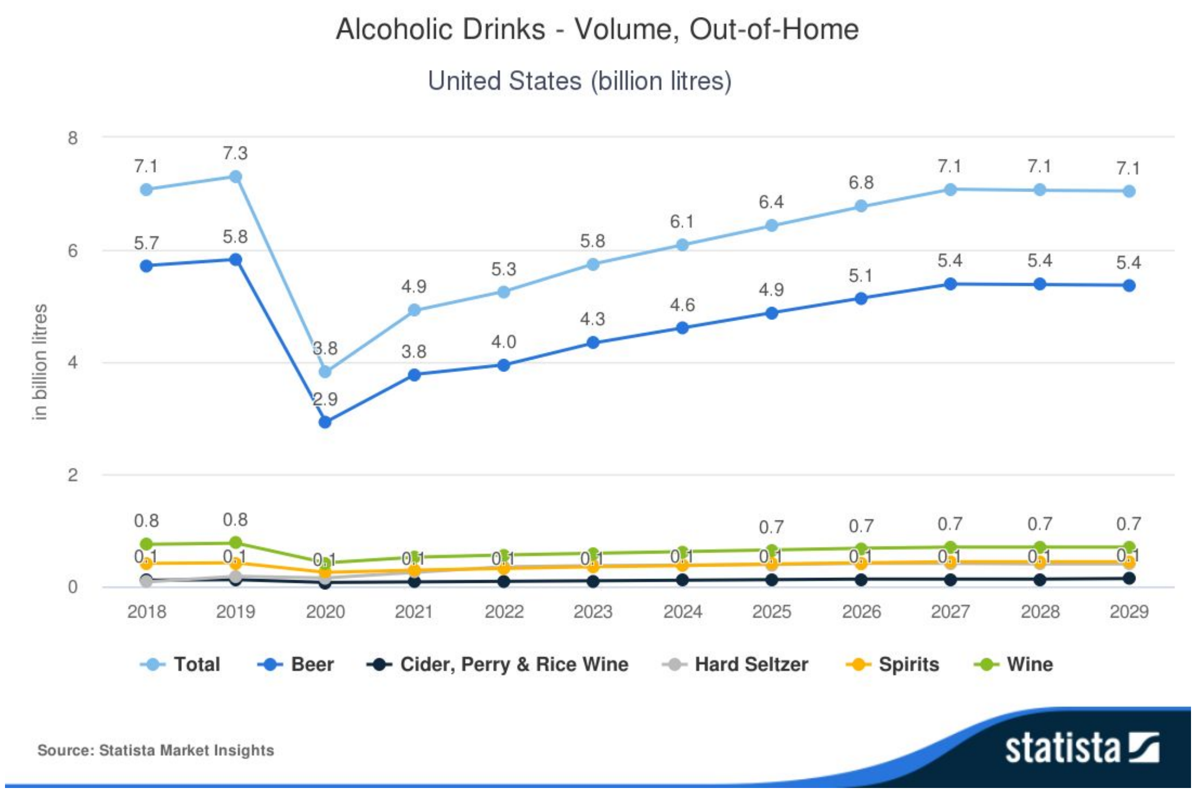


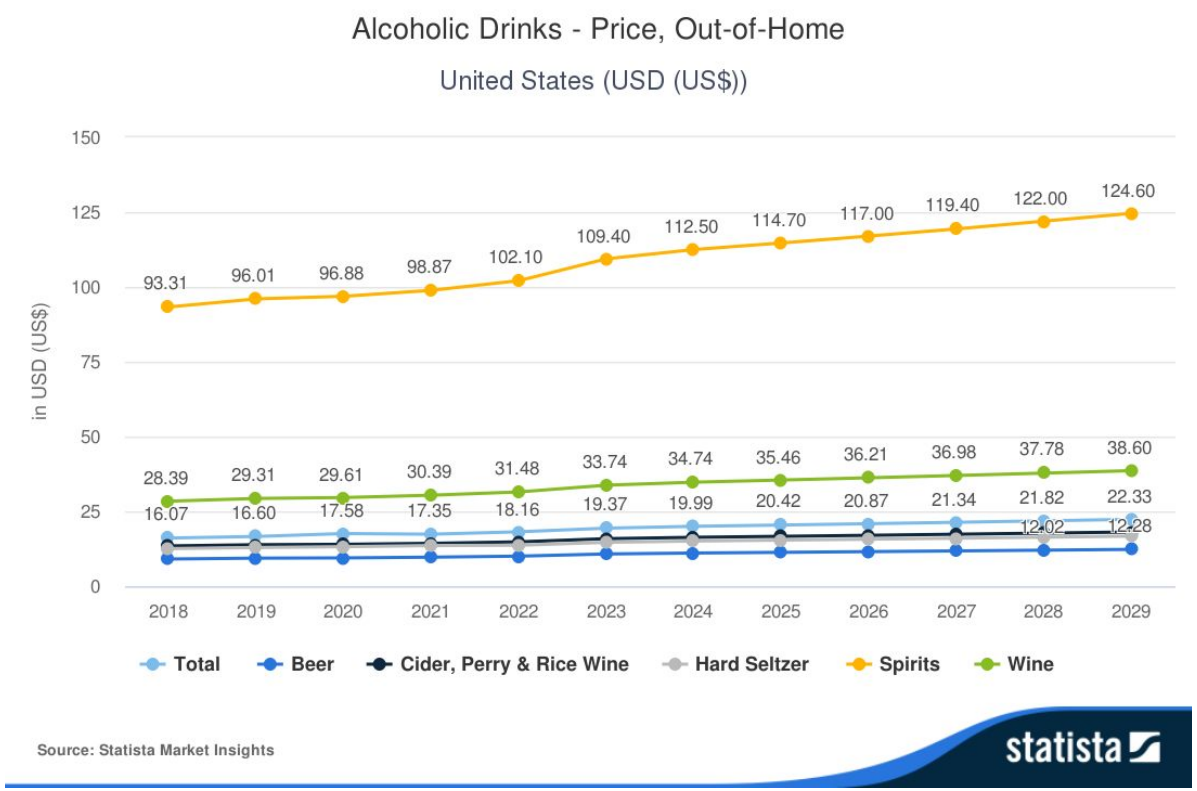


Data Source: 2024 Statista Market Forecast. Alcoholic Drinks. United States. Market Volume includes At Home Sales. Market sizes are determined through a Top-Down approach, building on specific predefined factors for each market segment. As a basis for evaluating markets, we use resources from the Statista platform as well as in-house market research, national statistical offices, international institutions, trade associations, companies, the trade press, and the experience of our analysts.

Despite rising prices, consumers continue to prioritize Out-of-Home consumption, with volume growth driven largely by the beer category. Reflecting recovery in consumer habits post-pandemic.

Alcoholic Drinks Market Performance

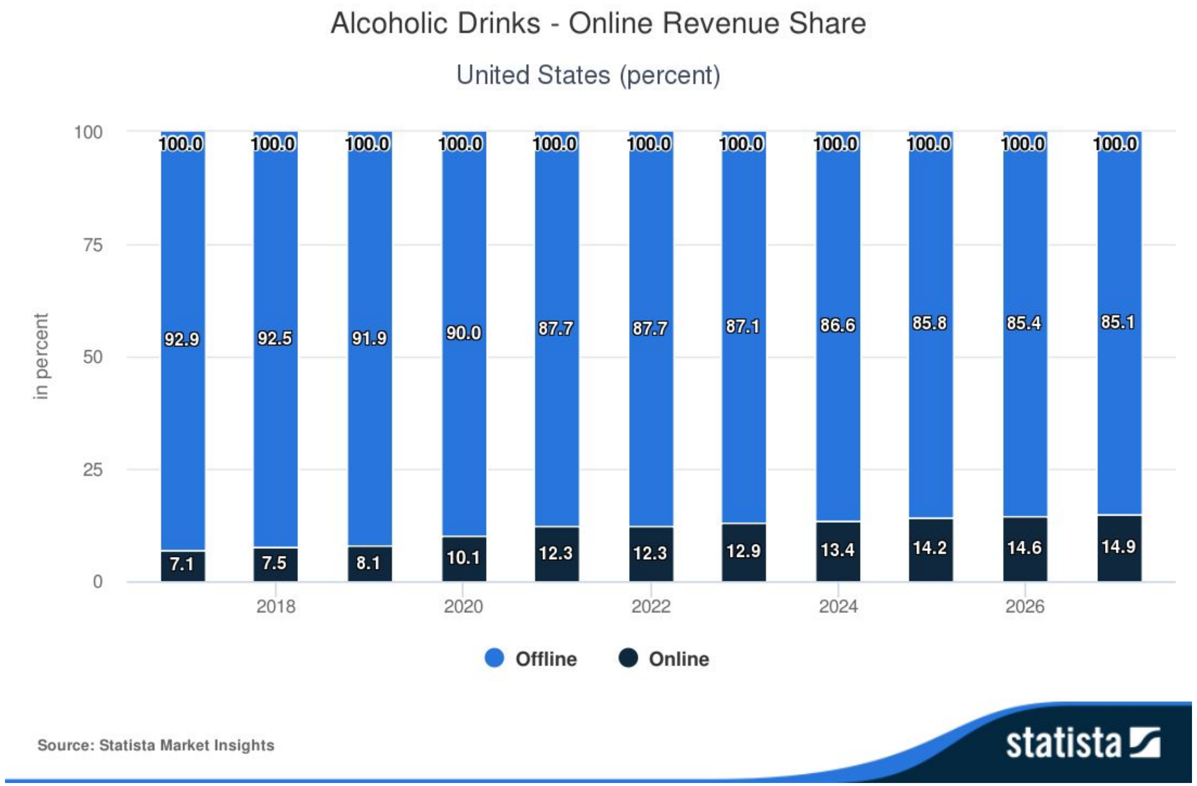


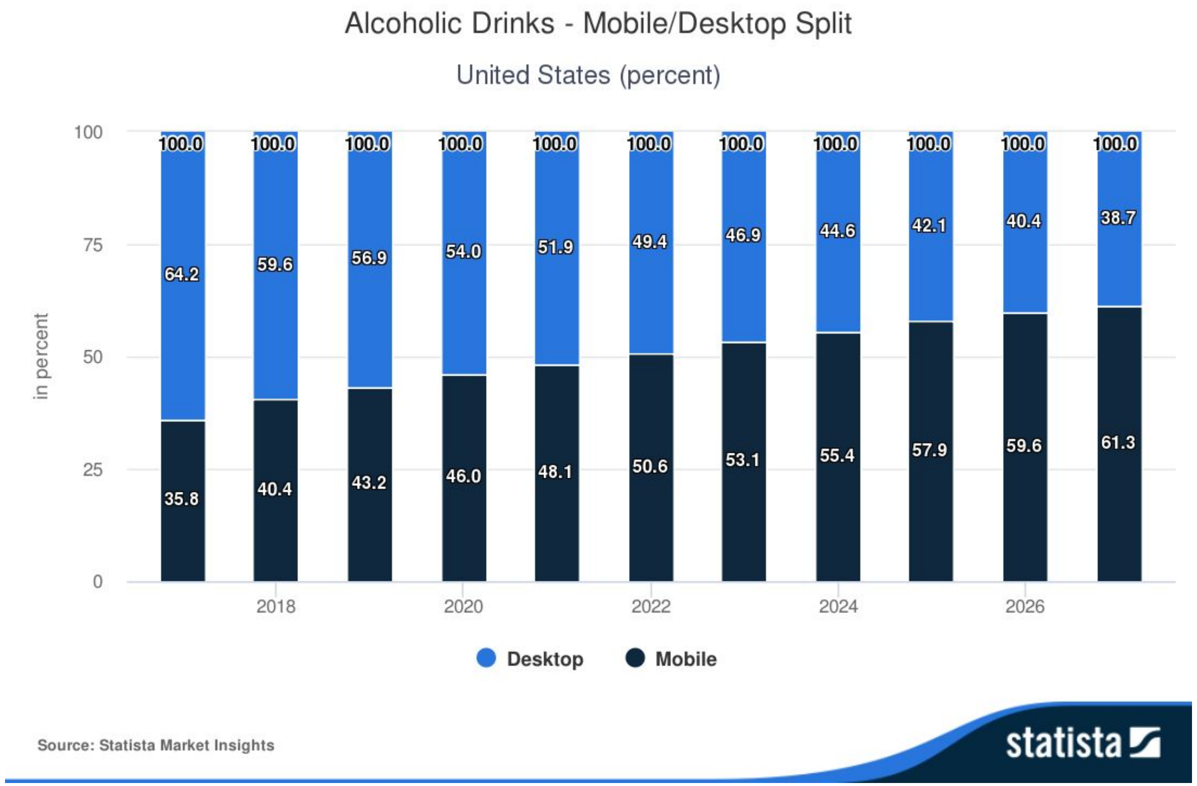


Data Source: 2024 Statista Market Forecast. Alcoholic Drinks. United States. Market Volume includes At Home Sales. Market sizes are determined through a Top-Down approach, building on specific predefined factors for each market segment. As a basis for evaluating markets, we use resources from the Statista platform as well as in-house market research, national statistical offices, international institutions, trade associations, companies, the trade press, and the experience of our analysts.

While offline channels remain dominant, online channels are increasingly capturing revenue, signaling a trend toward greater adoption. Furthermore, mobile devices are quickly emerging as the preferred choice for consumers.

Channels and Devices Performance

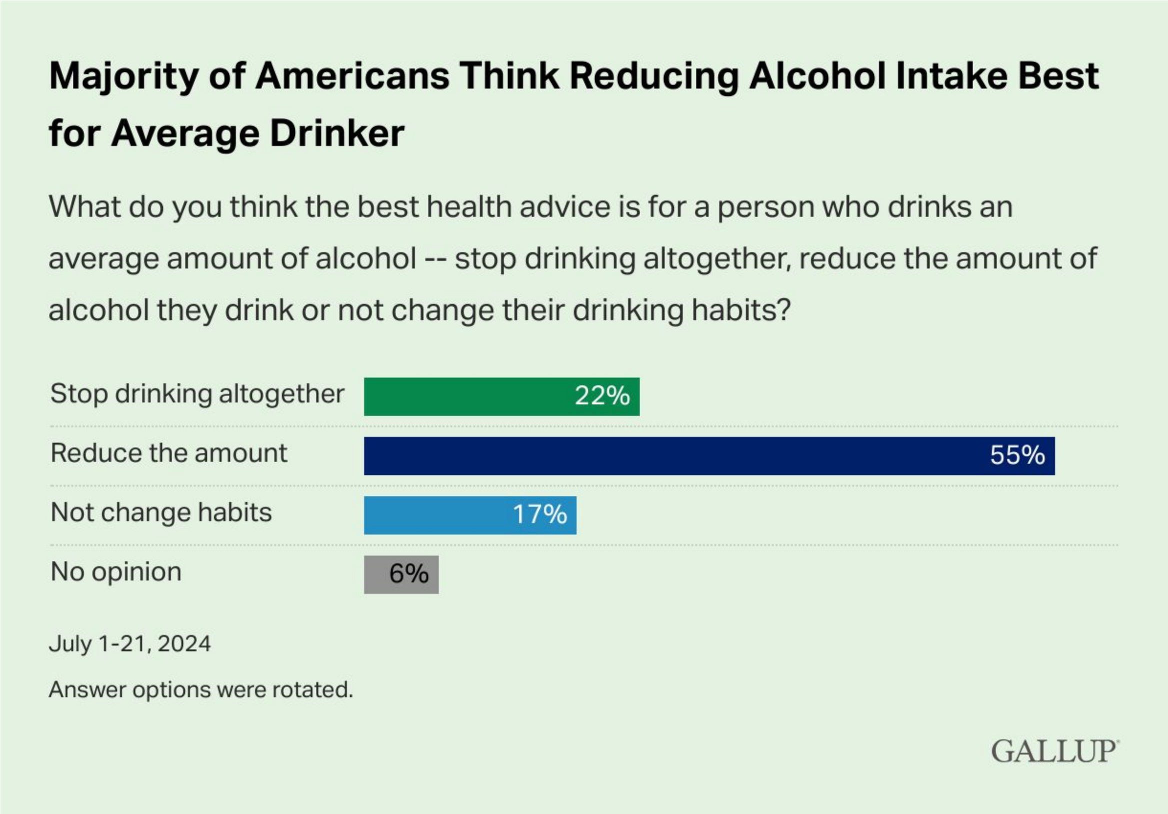


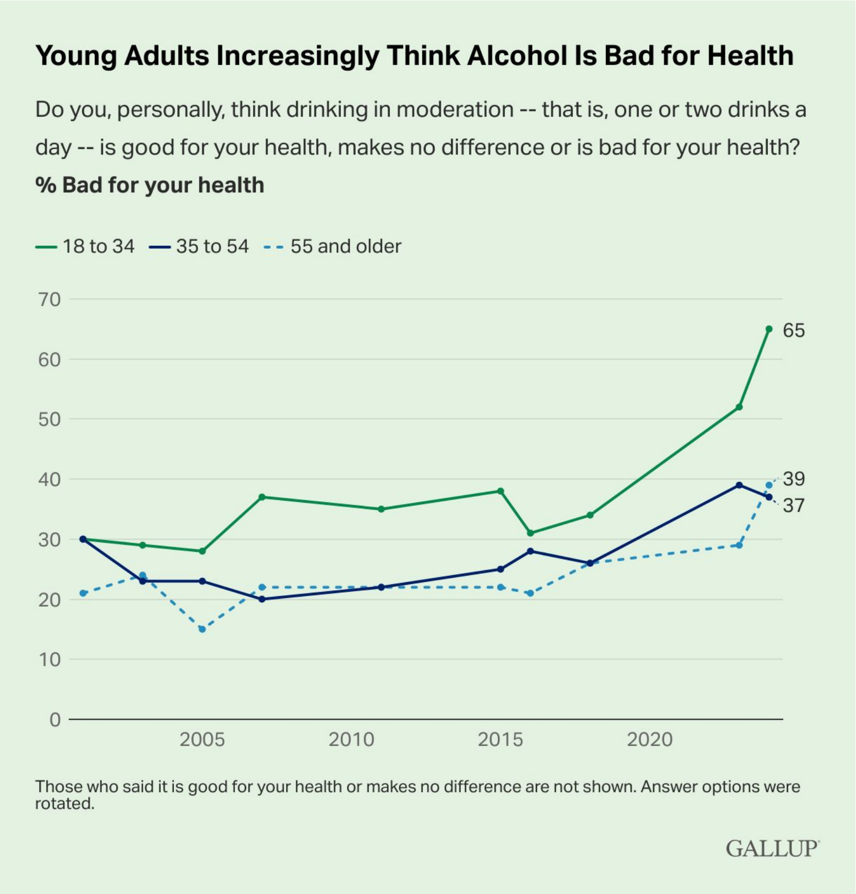


Data Source: 2024 Statista Market Forecast. Alcoholic Drinks. United States. Market Volume includes At Home Sales. Market sizes are determined through a Top-Down approach, building on specific predefined factors for each market segment. As a basis for evaluating markets, we use resources from the Statista platform as well as in-house market research, national statistical offices, international institutions, trade associations, companies, the trade press, and the experience of our analysts.

From an attitudinal perspective, consumers are increasingly concerned about the health implications of alcohol consumption, leading the majority to intend to reduce their drinking.

Attitudes Towards Alcoholic Drinks





Data Source: 2024 Gallup Consumption Habits. Results are based on telephone interviews conducted July 1-21, 2024, with a random sample of ~1,010—adults, ages 18+, living in all 50 U.S. states and the District of Columbia. For results based on this sample of national adults, the margin of sampling error is ±4 percentage points at the 95% confidence level. For results based on the sample of ~504—national adults in Form A and the sample of ~506- national adults in Form B, the margin of sampling error is ±5 percentage points. For results based on the sample of ~616—adults who drink alcoholic beverages, the maximum margin of sampling error is ±5 percentage points.

Appendix II : Beverage Buyer Profiles

Beer Buyer Profile

Among those who purchased alcoholic beverages in the past month

Type purchased

- 41% light beer
- 29% lager
- 12% malt
- 10% ale
- 13% IPA

Avg. # purchased per trip: **1.4 types**

Reason for purchase

58% home
13% restock
11% party / social gathering

Behavior & sentiments

76% haven't changed preferred stores in the past 6 months

54% influenced to purchase based on past brand experience

Brand is their #1 purchase influencer

Frequent, habitual purchasers who are brand-loyal

Purchase location

92% in-store
4% online, for delivery
4% online, for pickup

Purchase frequency

40% buy once / week or more

Demographics

41% Boomers, 32% Gen X

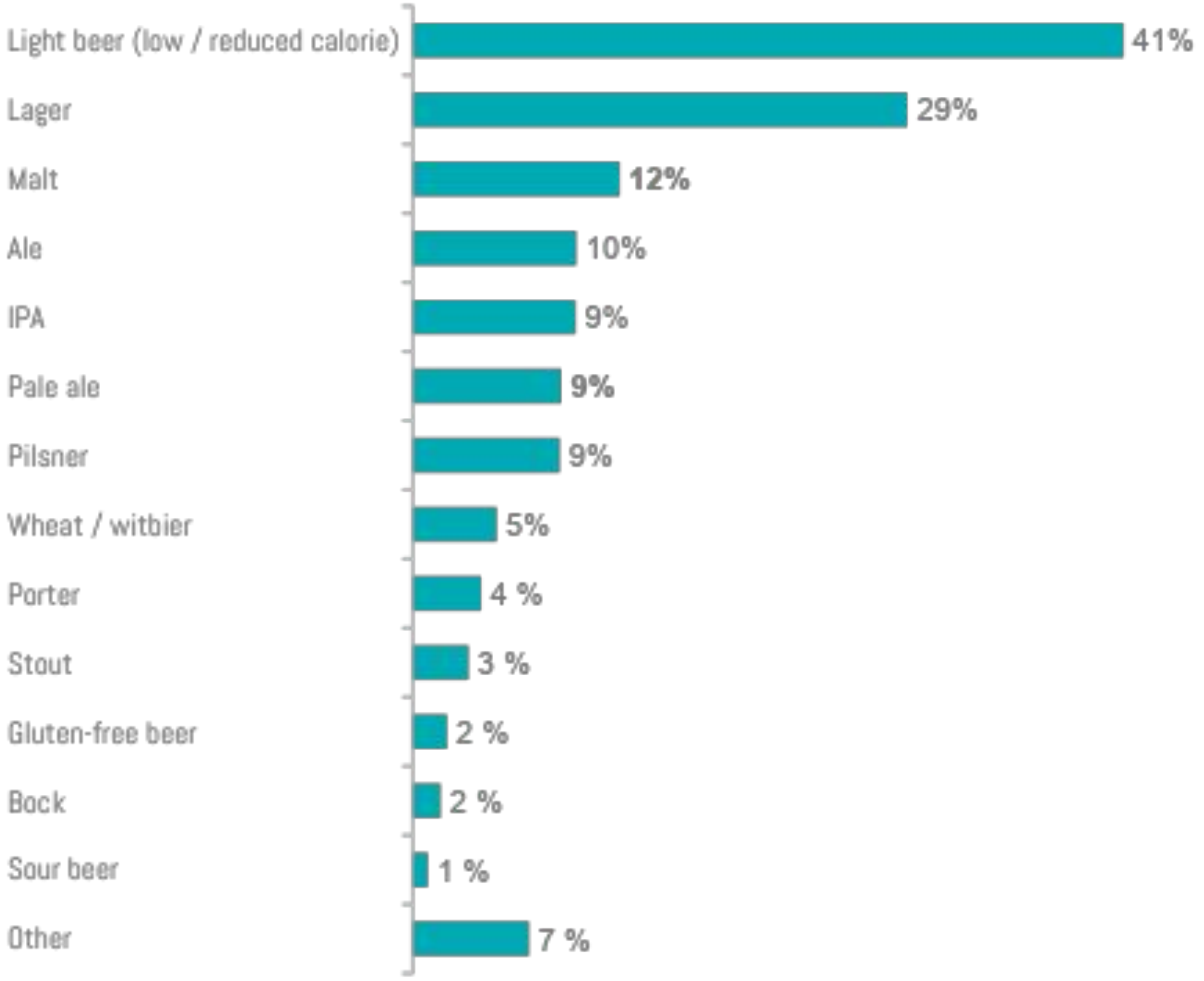
56% male

83% Caucasian / white

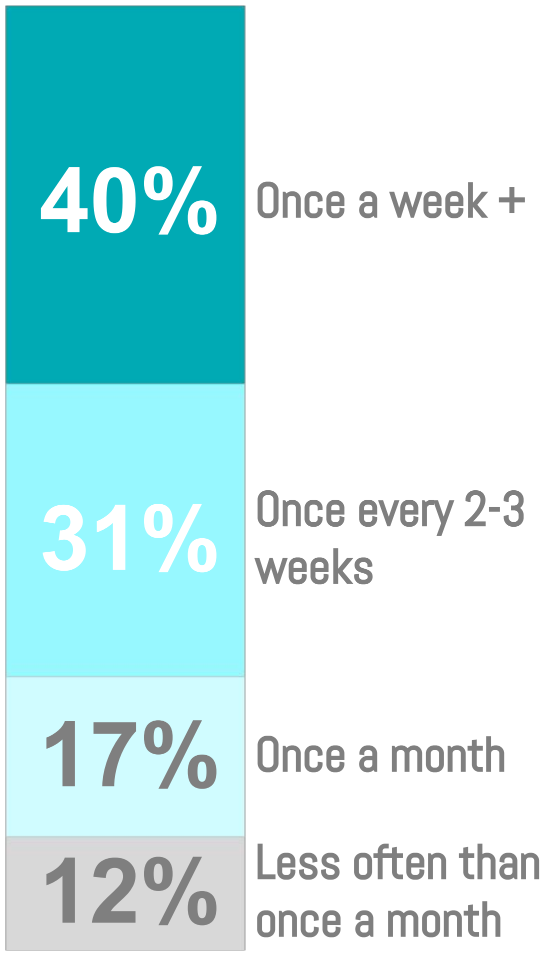
Data Source: 2024 BACi Consumer Study. *Base: purchased beer / seltzer during most recent alcoholic beverage purchase, n=313*
Q100 beer types, Q110A consumer decision tree, Q111 reason for purchase, Q120 purchase location, Q300 in-store actions, Q305 purchase location, Q310 purchase motivators, Q400 new products, Q400A frequency, Q405 new product motivators, Q410 purchase frequency, Q500 preferred stores.
S1 age, Q900 gender, Q910 ethnicity

Beer buying habits

Types of beer purchased



Beer purchase frequency



"Light beer", "sour beer", "gluten-free beer" added as new response options in 2024.
Data Source: 2024 BACi Consumer Study. *Base: Purchased beer in past month, n=313.*
Q100. Which **beer** product(s) did you buy, specifically, during your **most recent** purchase? *Please select all that apply.*
Q400A. How frequently do you typically purchase [INSERT CATEGORY]?

Wine Buyer Profile

Among those who purchased alcoholic beverages in the past month

Type purchased

- **27%** Chardonnay
- **26%** Merlot
- **24%** Rosé
- **22%** Moscato
- **18%** Cabernet Sauvignon
- **16%** Pinot Noir
- **13%** Pinot Grigio

Avg. # purchased per trip: **2.1 types**

Reason for purchase

53% home
14% restock
10% unplanned / spontaneous purchase

Purchase behavior

65% haven't changed preferred stores in the past 6 months

48% influenced to purchase based on past brand experience

Flavor is their #1 purchase influencer

Variety-seekers who are focused on flavor

Purchase location

80% in-store
11% online, for pickup
8% online, for delivery

Purchase frequency

26% buy once / week or more
37% buy every 2-3 weeks

Demographics

30% Gen X, 31% Boomers

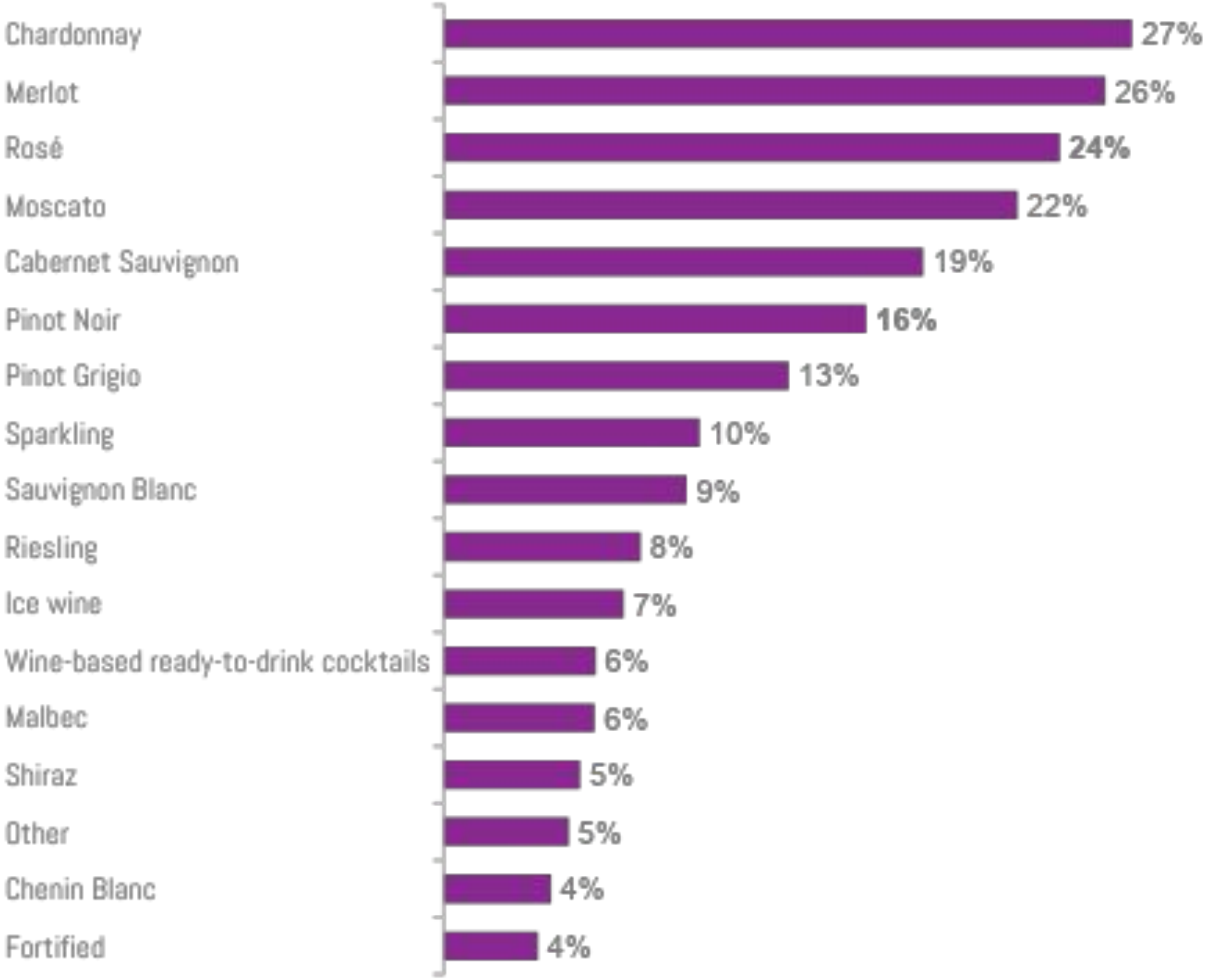
63% female

76% Caucasian / white
16% African American / black

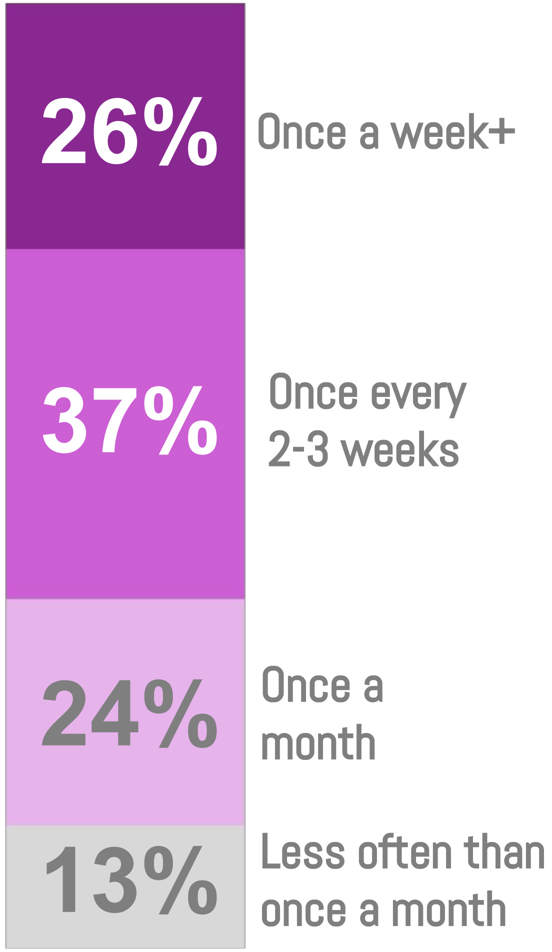
Data Source: 2024 BACi Consumer Study. *Base: purchased wine during most recent alcoholic beverage purchase, n=XX*
Q105 wine types, Q110A consumer decision tree, Q111 reason for purchase, Q120 purchase location, Q305 store purchase location, Q310 purchase motivators, Q400A frequency, Q410 online vs in-store purchase frequency
S1 age, Q900 gender, Q910 ethnicity

Wine buying habits

Types of wine purchased



Wine purchase frequency



Data Source: 2024 BACi Consumer Study. *Base: Purchased wine in past month, n=312.*
Q105. Which wine product(s) did you buy, specifically, during your most recent purchase? *Please select all that apply.*
Q400A. How frequently do you typically purchase [INSERT CATEGORY]?

Liquor / RTD Cocktail Buyer Profile

Among those who purchased alcoholic beverages in the past month

Type purchased

50% vodka
29% tequila
26% whiskey
18% RTD-cocktails
15% rum

Avg. # purchased per trip: **1.8 types**

Purchase occasion

48% home
22% restock
10% unplanned / spontaneous purchase

Purchase behavior

72% haven't changed preferred stores in the past 6 months

47% influenced to buy based on past brand experience

Price is their #1 purchase influencer

Balanced buyers who focus on both brand and price

Purchase location

91% in-store
6% online, for pickup
3% online, for delivery

Purchase frequency

28% buy once / week or more
29% buy every 2-3 weeks

Demographics

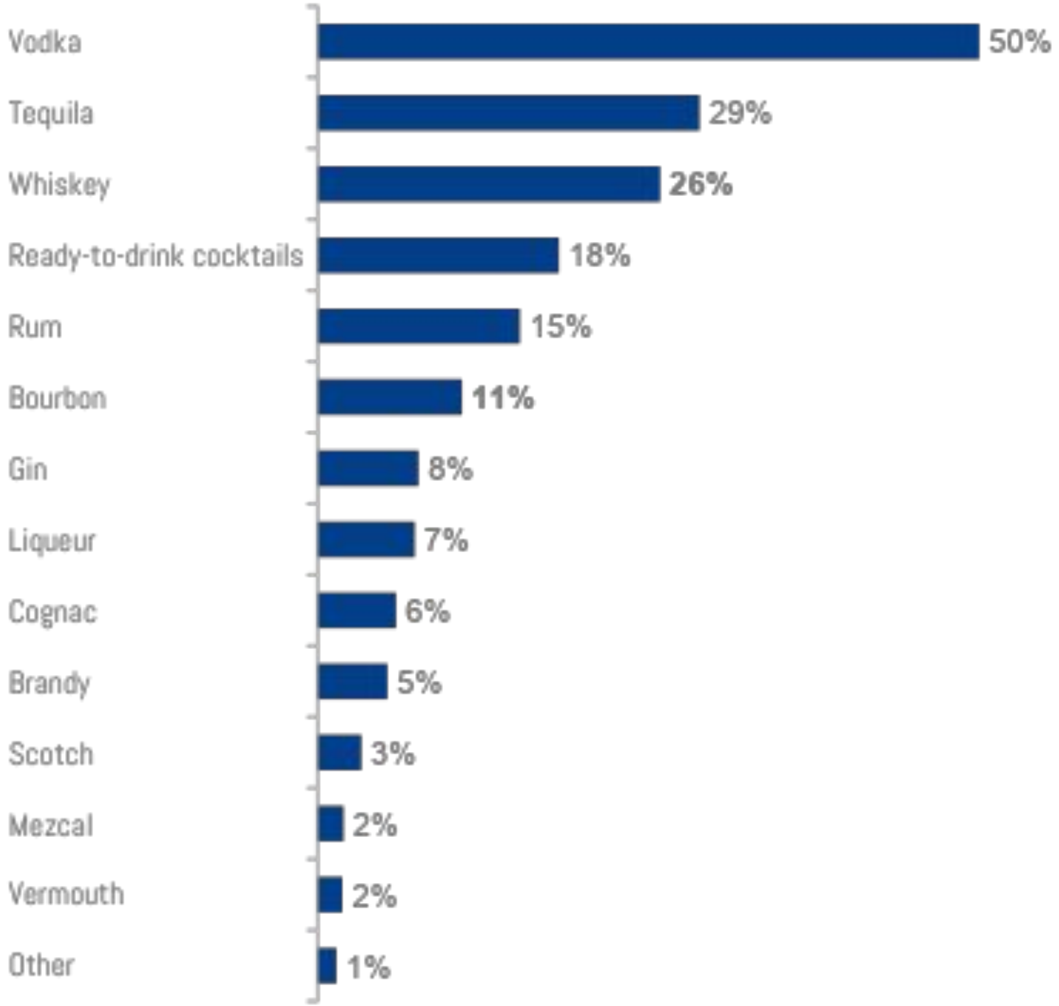
31% Gen X, 33% Boomers

49% female, 51% male

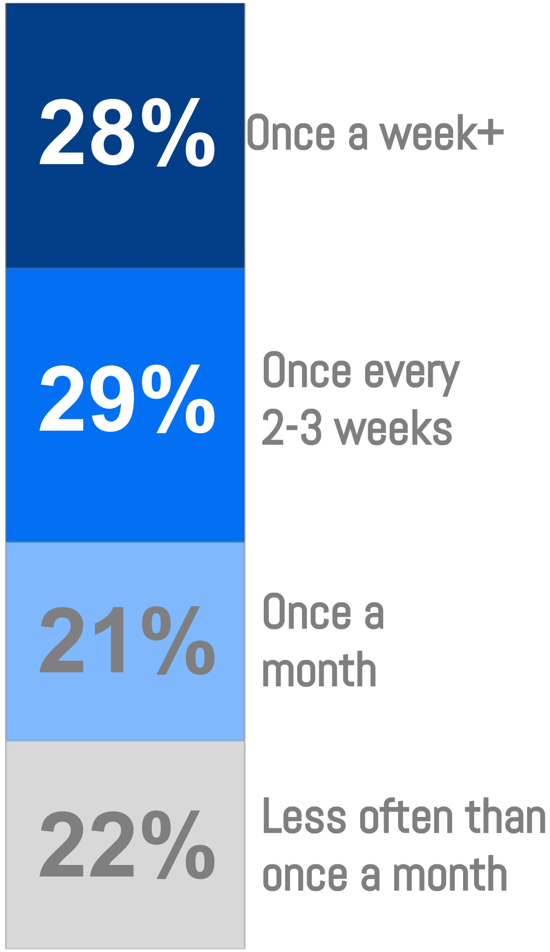
79% Caucasian / white
14% African American / black

Liquor / RTD cocktail buying habits

Types of liquor / RTD cocktails purchased



Liquor / RTD cocktail purchase frequency



"Brandy" and "mezcal" added as new response options in 2024.
Data Source: 2024 BACi Consumer Study. *Base: Purchased liquor/ready-to-drink cocktails in past month, n=312.*
Q110. Which liquor/spirit product(s) did you buy, specifically, during your most recent purchase? *Please select all that apply.*
Q400A. How frequently do you typically purchase [INSERT CATEGORY]?

Hard Seltzer Buyer Profile

Among those who purchased alcoholic beverages in the past month

Other beverages purchased in the past month

78% beer
74% liquor / spirits
66% RTD cocktails
63% wine
52% hard cider
42% Non-alcoholic cocktails

Purchase occasion

40% home
15% during outdoor activity
14% party / social gathering

Purchase behavior

30% influenced to buy based on past brand experience

46% haven't changed preferred stores in the past 6 months

Flavor and **Price** are their #1 purchase influencers

Flavor-driven explorers who are willing to try something new

Purchase location

77% in-store
13% online, for pickup
10% online, for delivery

Purchase frequency

40% buy once / week or more
38% buy every 2-3 weeks

Demographics

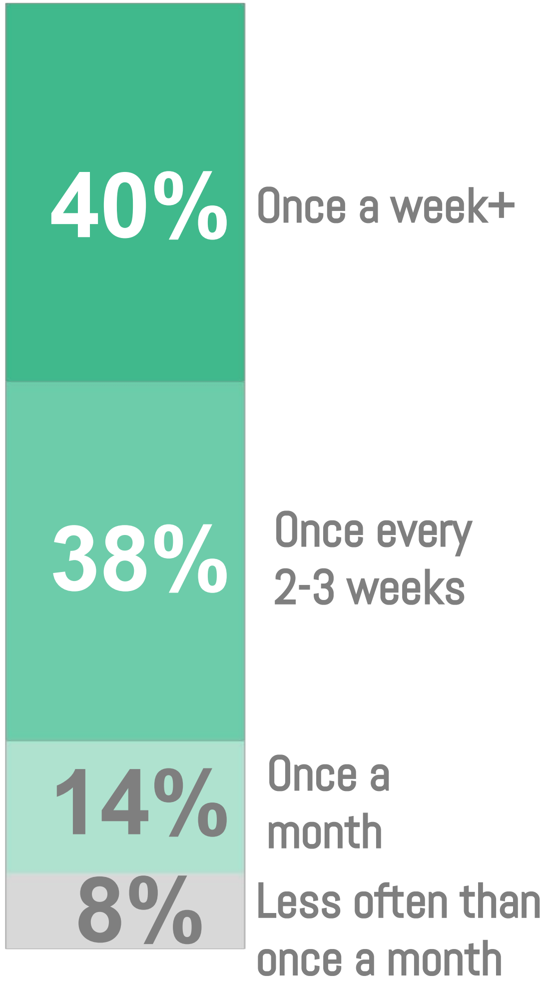
38% Millennials, 20% Gen Z

49% female, 51% male

73% Caucasian / white
15% African American / black

Data Source: 2024 BACi Consumer Study. *Base: purchased seltzer during most recent alcoholic beverage purchase, n=313*
Q110 liquor types, Q111 reason for purchase, Q120 purchase location, Q305 store purchase location, Q310 purchase motivators, Q400A frequency, Q410 online vs in-store purchase frequency, Q505 changed shopping habits
S1 age, Q900 gender, Q905 Hispanic / Latino/a/x ethnicity, Q910 ethnicity

Hard Seltzer purchase frequency

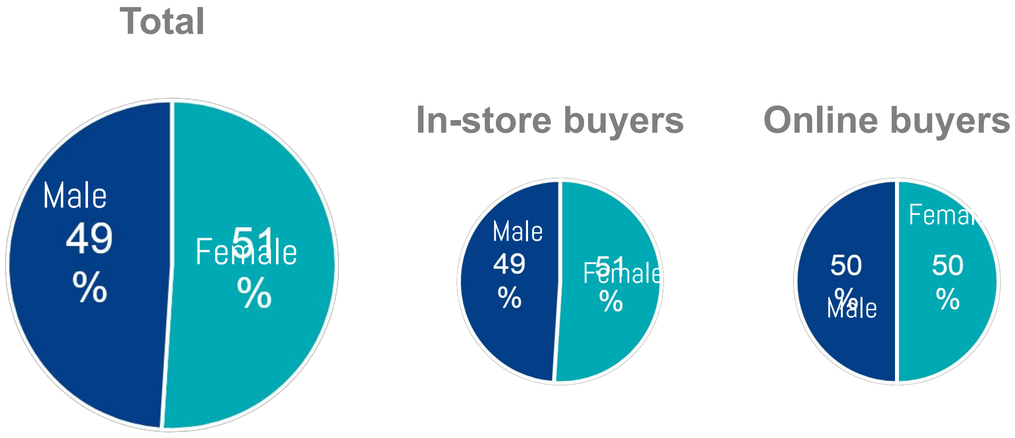


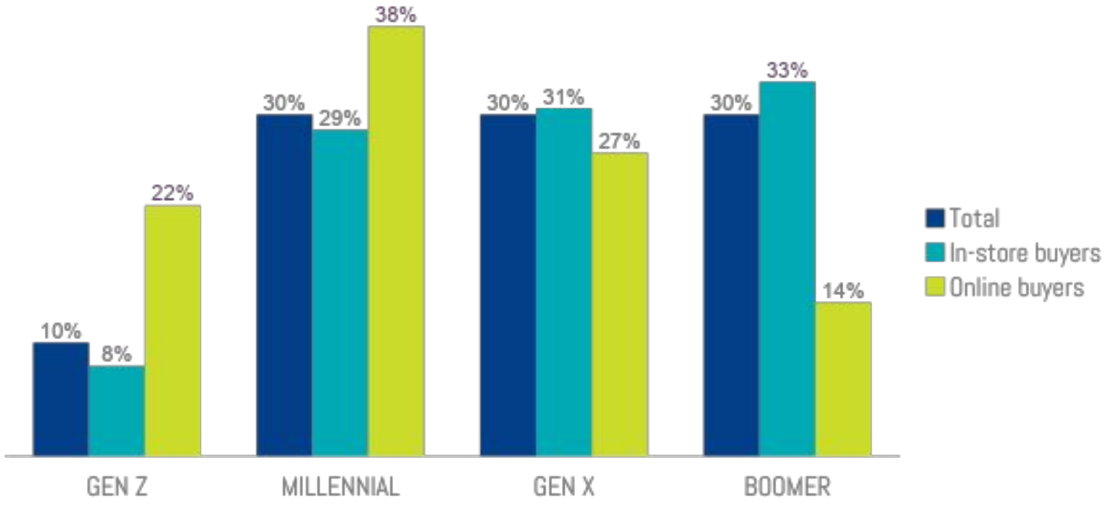
Data Source: 2024 BACi Consumer Study. *Base: Seltzer buyers, n=313.*
Q400A. How frequently do you typically purchase [INSERT CATEGORY]?

Appendix III: Demographics

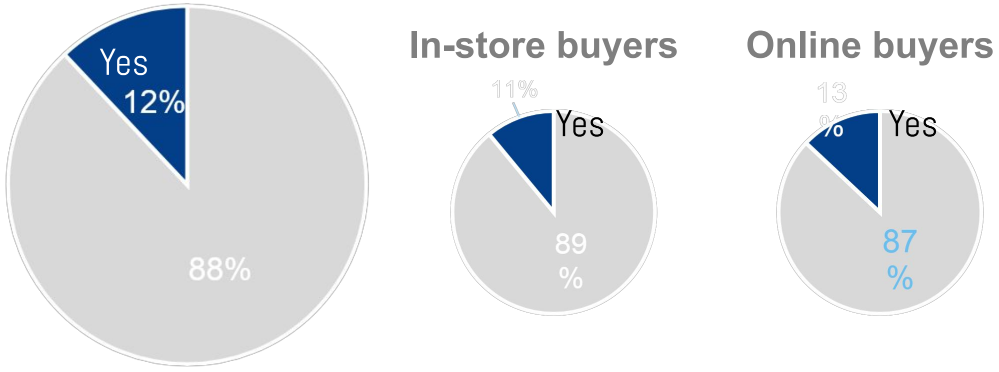
Respondent Profile

Gender

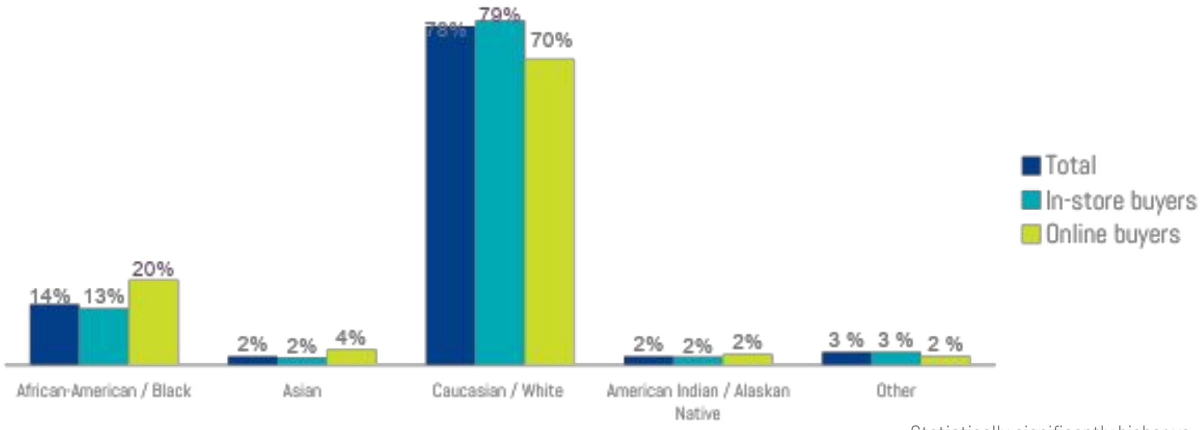




Hispanic or Latino/a/x descent



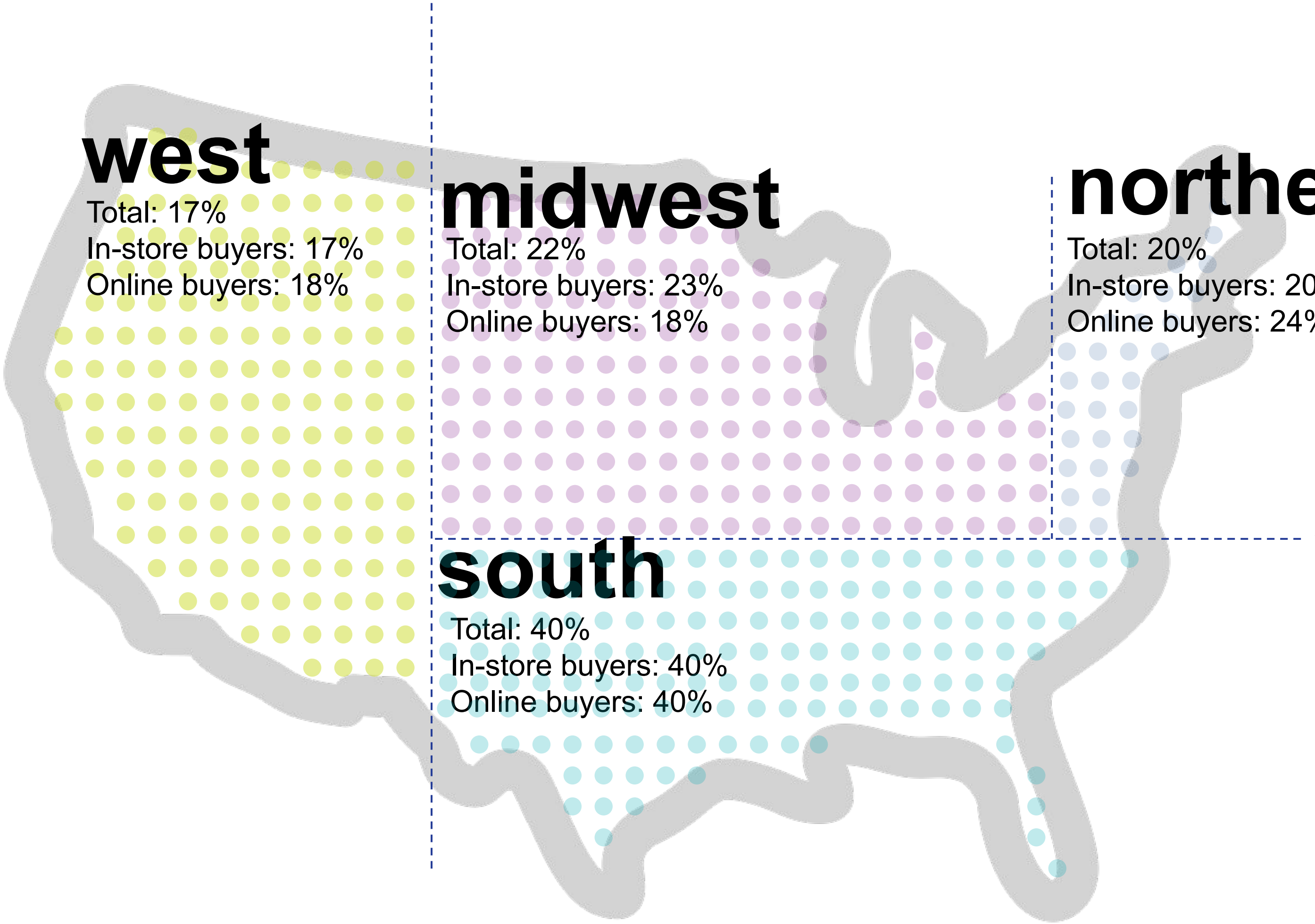
Race / Ethnicity



Data Source: 2024 BACi Consumer Study. *Base: Total respondents, n=1,250. Purchased in-store most recently, n=1,062. Purchased online most recently, n=188*
S1. What is your age? Q900. Do you identify as... Q905. Are you of Hispanic or Latino/a/x/ descent?
Q910. Which of the following groups do you most closely identify with?

Statistically significantly higher vs. in-store buyers or online buyers at the 95% confidence level

Geographic location



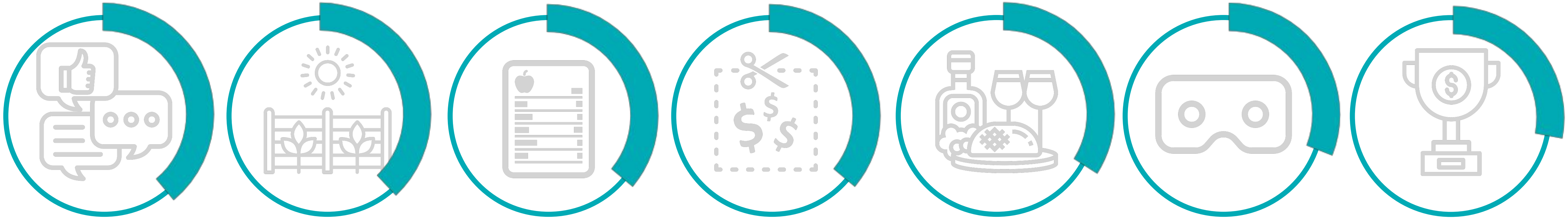
Statistically significantly higher vs. in-store buyers or online buyers at the 95% confidence level

Data Source: 2024 BACi Consumer Study. *Total respondents, n=1,250. Purchased in-store most recently, n=1,062. Purchased online most recently, n=185.*
S2. Which state do you live in?

Appendix IV: Additional Analysis

QR code purchase motivators*

among those who scanned QR codes in-store



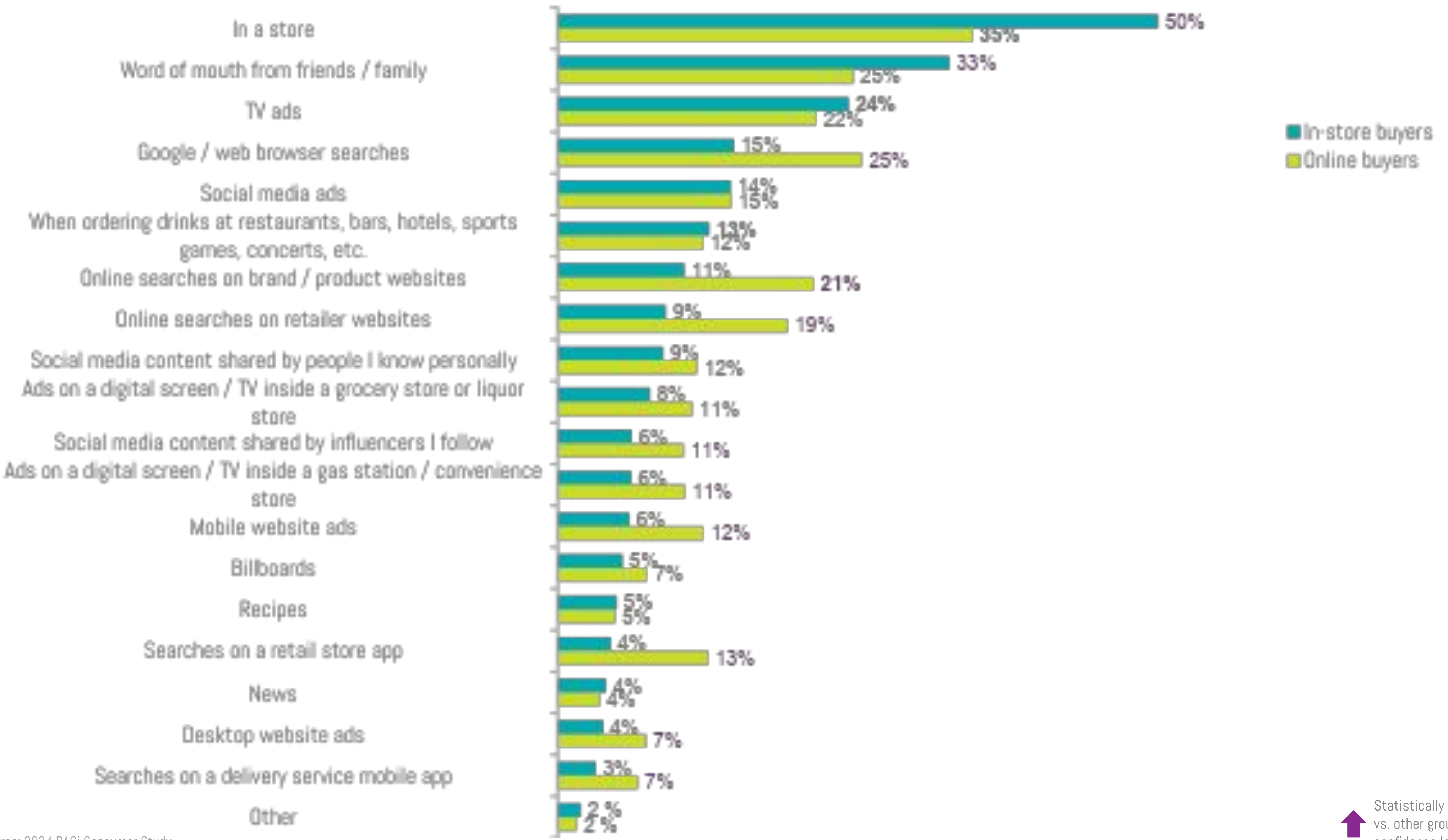
39%	38%	36%	36%	34%	31%	28%
link to product on social media	info on where / how product is made	ingredients / nutrition info	coupon / deal	recipes / food pairings	interactive / augmented reality experience	contest / sweepstakes

**Sample size is n<100; interpret results directionally and with caution.*

Data Source: 2024 BACi Consumer Study. *Base: respondents who were influenced to purchase after scanning a QR code n=50**

Q312. After scanning a product QR code, which of the following information influenced your most recent purchase of [INSERT CATEGORY]? *Please select all that apply.*

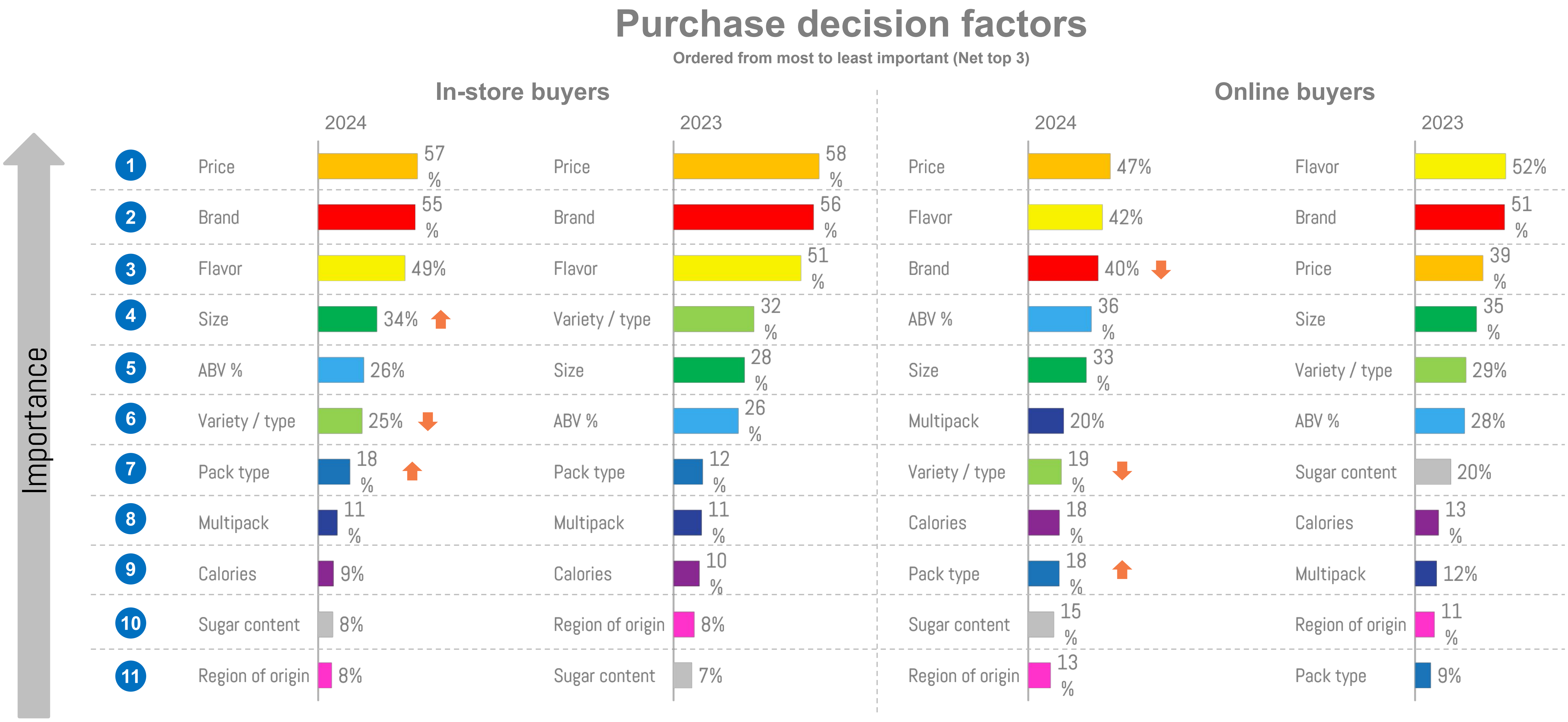
How do you learn about new products?



Statistically significantly higher vs. other group at the 95% confidence level

Data Source: 2024 BACi Consumer Study.
Q400. How do you typically find out about new [INSERT CATEGORY] products? *Please select all that apply. Base: shop online often / always for alcoholic beverages, n=212. Shop in-store often / always for alcoholic beverages, n=918.*

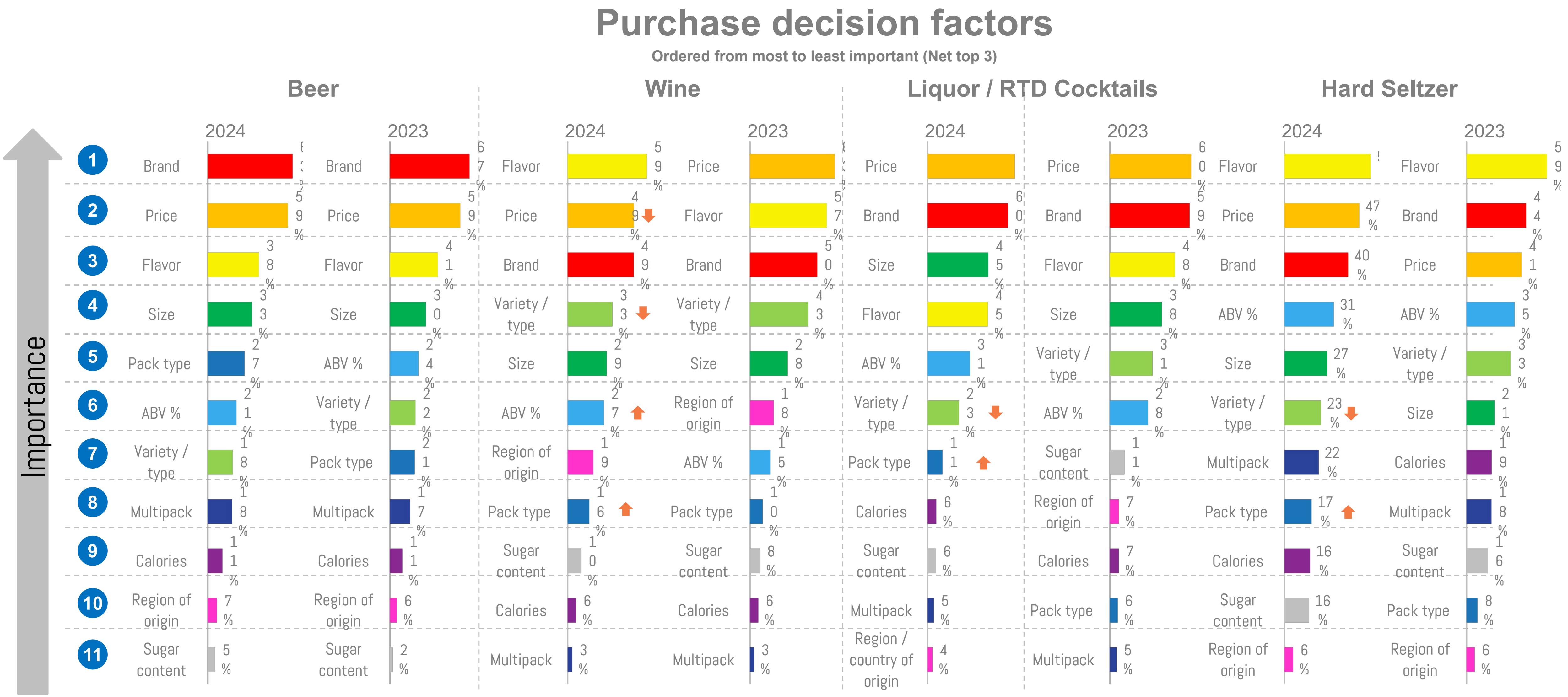
Consumer decision analysis: in-store buyers vs. online buyers



Data Source: 2023 & 2024 BACi Consumer Study. Total respondents, 2024, n=1,050. 2023, n=1,264. *Bought bev alc in-store most recently*, 2024, n=1,062. 2024, *n=1,096. Bought bev alc online most recently*, 2024, n=188. 2023, *n=168*.
Q110A. Please think back to your most recent purchase of **[insert category from S3 / selected cell]** ; when you were standing in front of the shelf or browsing a website for **[insert category from S3 / selected cell]** , which of the following criteria were important to you when you made your product selection? *Please rank the following factors from 1 to 11, where "1" is the **most** important factor and "11" is the **least** important factor. Please exclude sales / discounts / coupons from your consideration.*

Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

Consumer decision analysis: alcoholic beverage types



Data Source: 2023 / 2024 BACi Consumer Study.

Total respondents, 2024, n=1,050. 2023, n=1,264. Beer buyers, 2024, n=313. 2023, n=319. Wine buyers, 2024, n=312. 2023, n=313. Liquor / RTD cocktail buyers, 2024, n=312. 2023, n=311. Seltzer buyers, 2024, n=313. 2023, n=321.

Q110A. Please think back to your most recent purchase of [insert category from S3 / selected cell] ; when you were standing in front of the shelf or browsing a website for [insert category from S3 / selected cell] , which of the following criteria were important to you when you made your product selection? *Please rank the following factors from 1 to 11, where "1" is the **most** important factor and "11" is the **least** important factor. Please exclude sales / discounts / coupons from your consideration.*

Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

In-store vs. online buyer profile 2024

In-store buyers

*are **more likely** vs online buyers to be...*

generation: **31%** Gen X, **33%** Boomers

gender: ***No significantly higher values***

location: ***No significantly higher values***

purchased in last month*: ***No significantly higher values***

Online buyers

*are **more likely** vs in-store buyers to be...*

generation: **22%** Gen Z, **38%** Millennials

gender: ***No significantly higher values***

location: **24%** Northeast

purchased in last month*:

52% RTD cocktails
51% Hard Seltzer
45% non-alc cocktails / spirits
42% non-alc beer
43% hard cider
42% non-alc wine
33% hard kombucha

**Purchases made among those who have purchased at least one type of alcoholic beverage in the past month*

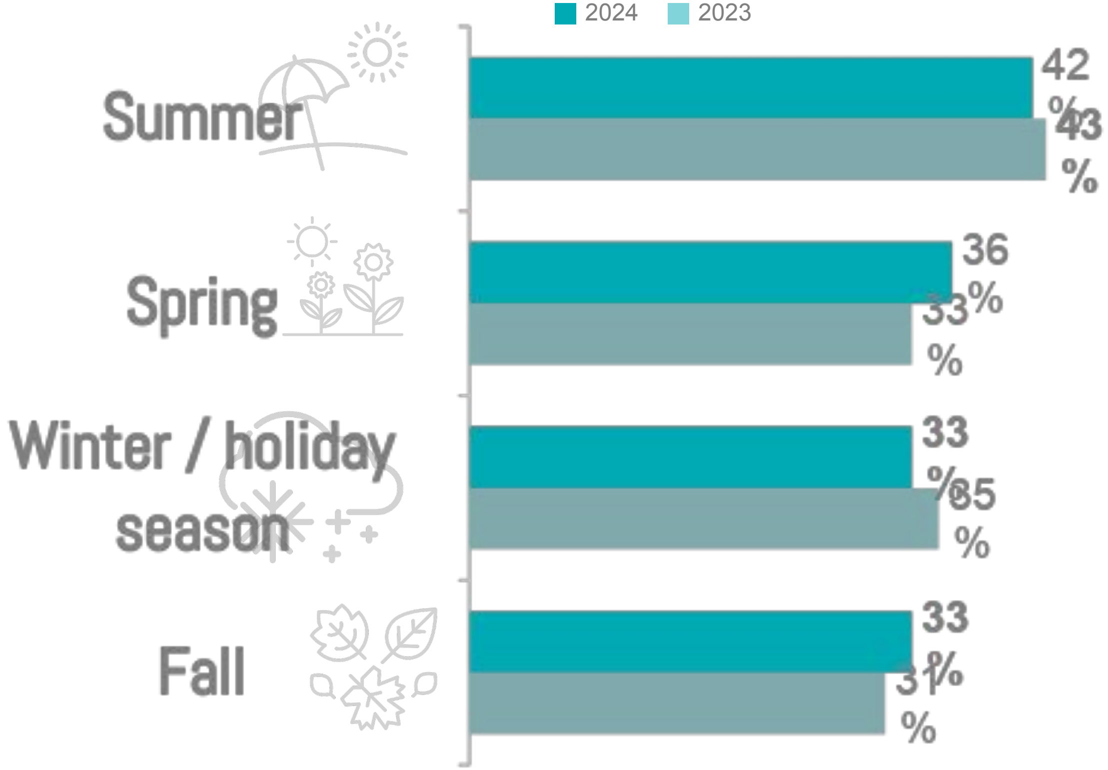
Data Source: 2024 BACi Consumer Study. Total respondents, n=1,250. Bought bev alc in-store most recently, n=1,062. Bought bev alc online most recently, n=188.
S1 age, S2 state, S3 beverage purchase incidence, Q900 gender

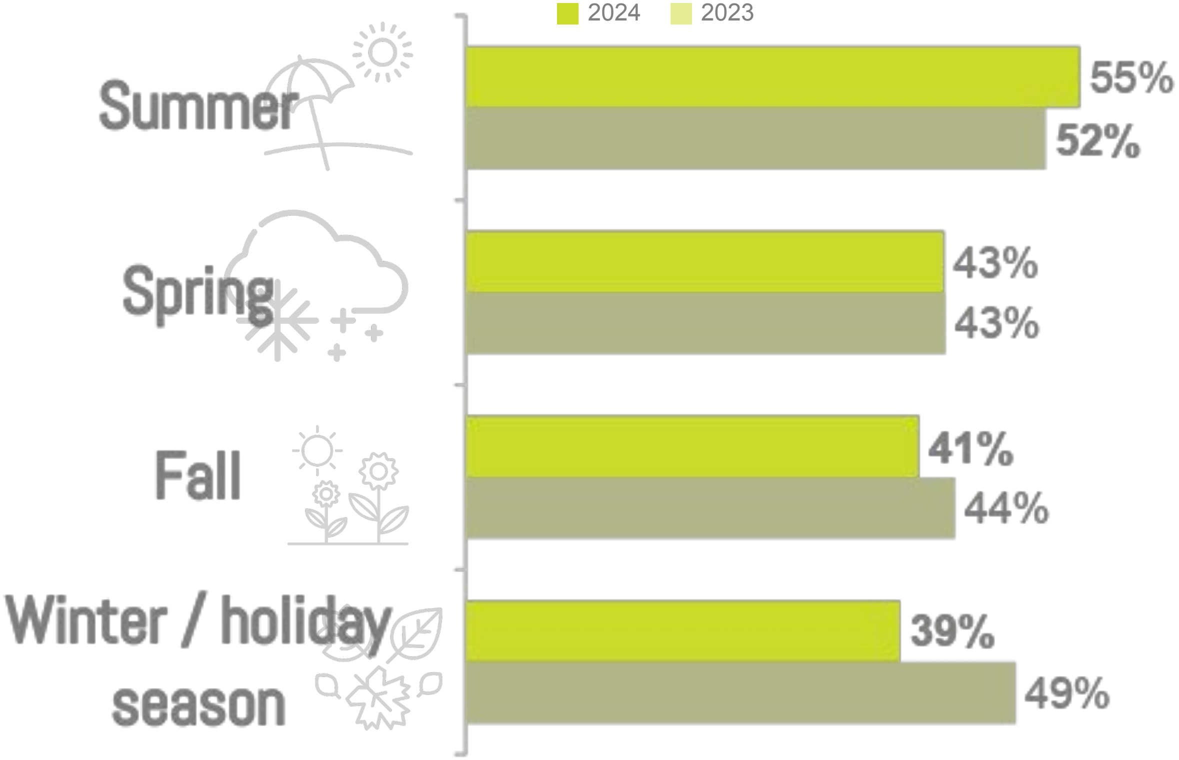
Above chart shows groups that are statistically significantly higher among either in-store buyers or online buyers at the 95% confidence level

Summer and Spring remain the peak seasons for alcohol consumption. In 2024, both In-Store and Online buyers are likely to reduce their purchase frequency during Winter.

Purchase seasonality

Purchase once a week or more often during given season





Statistically significant differences at the 95% confidence level:
Higher or lower than 2023

Data Source: 2023 & 2024 BACi Consumer Study. *Base: shop online often / always for alcoholic beverages, 2024, n=212. 2023, n=163. Shop in-store often / always for alcoholic beverages, 2024, n=918. 2023, n=1,081*
Q400B. How frequently do you typically purchase [insert category from S3 / selected cell] during each of the following seasons?

Marketing claims that would motivate purchase: open-ended question

1. Price and Promotions 25% (374 responses)	2. Flavor and Taste Preferences 23.3% (294 responses)	3. Quality and Ingredients 10.4% (131 responses)	4. Local and Craft Production 9.9% (125 responses)	5. Social and Ethical Claims 9.9% (125 responses)	6. Brand Loyalty and Familiarity 8.9% (113 responses)	7. Recommendations and Social Media 4.9% (62 responses)	8. Health and Wellness Claims 3.2% (40 responses)
1.1 Discounts and Coupons Volume: 9.9% "If I had a coupon I would try the product." "Buy one get one free." "Discounted prices."	2.1 Unique and Interesting Flavors Volume: 11.4% "If they create anything with exotic fruit flavors, I'll buy it." "I like trying different hard seltzer flavors." "New flavors would motivate me to buy."	3.1 Organic and Natural Ingredients Volume: 7.4% "I would be encouraged to buy if there were claims of organic ingredients." "Natural flavors are a must for me." "I prefer drinks made with organic ingredients."	4. 1 Locally Produced Volume: 5.9% "Yes, locally produced would motivate me." "Definitely if it was made in Michigan, I would give it a shot!" "I prefer local brands."	5.1 Sustainability and Environmental Responsibility Volume: 4.9% "Sustainably produced products motivate me." "I prefer brands that are environmentally friendly." "Carbon neutral would encourage me to try it."	7.1 Preference for Known Brands Volume: 5.9% "I only buy brandy; I'm not too interested in others." "I like the beer I like. I'm not too interested in others." "I stick to what I like."	6.1 Recommendations from Friends and Family Volume: 3% "If my friends recommend it, I might try it." "I would consider trying a new beer if my family liked it." "Recommendations from friends are important to me."	8.1 Low Calorie Options Volume: 2.5% "Low-calorie options would motivate me." "I prefer drinks that are low in calories." "If it's low calorie, I'm more likely to buy it."
1.2 Sales and Promotions Volume: 7.4% "A good sale on a brand that I like." "Promotions or promo code for new customers." "Bundled wine deals."	2.2 Preference for Sweetness Levels Volume: 5.9% "I prefer drinks that are sweeter." "I like less sweet options." "Sweeter flavors motivate me."	3.2 Quality of Ingredients Volume: 2.9% "The quality of ingredients is most important to me." "I look for drinks made with high-quality ingredients." "Good quality ingredients can make a big difference."	4.2 Craft Production Volume: 3% "I love craft beers; they have unique flavors." "Craft distilleries are more appealing to me." "I prefer products made at a craft brewery."	5.2 Support for Social Causes Volume: 3% "If they donated to an animal shelter, I would buy it." "I like brands that support good causes." "Giving back to the community is important to me."	7.2 Familiarity with Product Types Volume: 3% "I usually buy the same." "I know what I like and I usually stick to it." "I go by recommendation."	6.2 Social Media Influence Volume: 1.5% "I like when influencers promote an alcoholic beverage." "Social media ads can motivate me to try something new." "I follow brands I like on social media."	8.2 Health Benefits Volume: 0.7% "Good for your health would motivate me." "If it has health benefits, I might try it." "I look for drinks that are gluten-free."
1.3 Affordable Pricing Volume: 7.4% "Affordable pricing." "Lower price." "Cheaper prices."	2.3 Smoothness and Quality of Taste Volume: 4% "I like a smooth taste." "Smooth, not harsh is what I prefer." "Quality taste is most important."		4. 3 Support for Local Economies Volume: 0.9% "I like to support local businesses." "Buying local helps my community." "I prefer to buy from brands that are based in my area."	5.3 Diversity and Inclusion Volume: 2% "I would buy from a BIPOC-owned brand." "Brands owned by underrepresented groups are important to me." "Diversity in ownership is a factor in my purchasing decisions."		6.3 In-Store Recommendations Volume: 0.4% "I trust recommendations from store employees." "If an employee recommends it, I'm more likely to try it." "In-store promotions catch my attention."	
1.4 Free Samples Volume: 5% "If there was a free sample so I could try it first." "Free store sample would motivate me." "I would try it if I could sample it first."	2.4 Familiar Flavors Volume: 2% "I stick to what I like." "I only buy the flavors I know." "I like what I like."						

New question added in 2024.

Data Source: 2024 BACi Consumer Study. *Total respondents, n=1250* . Q456. Are there any other marketing claims that would motivate you to purchase a new type of [insert category from S3 / selected cell]?

What other product(s) did you purchase to accompany the consumption of your most recent alcoholic beverage purchase?

1. Pizza 20% (250 responses)	2. Chips and Salty Snacks 15% (187 responses)	3. Cheese and Crackers 10% (125 responses)	4. Steak and Meat Dishes 10% (125 responses)	5. Tacos and Mexican Food 8% (100 responses)	6. Other Meals and Snacks 12% (150 responses)	7. No Preference or None 5% (62 responses)
"Pizza or hamburgers." "I enjoy Italian dishes or pizza with my wine." "Pizza goes great with beer."	"Chips and salsa." "I like to snack on chips and dip." "Something salty like pretzels."	"Cheese and crackers." "I love having manchego cheese and crackers with white wine." "Cheese and crackers with sliced deli meats."	"I like wine with steak." "A nice medium-rare steak goes well with red wine." "Steak and potatoes."	"Tacos and beer are a great match." "I enjoy tacos with my drinks." "Mexican food is my favorite with beer."	"I like seafood with vodka." "Burgers and fries are my go-to." "I enjoy pasta with my wine."	"I don’t have a favorite." "Nothing in particular." "I don't eat when I drink."

Data Source: 2024 BACi Consumer Study. *Total respondents, n=1,250*
Q110G. What other product(s) did you purchase (in the same store or in another store) to accompany the consumption of the [insert category from S3 / selected cell] you purchase? *Please consider meal items, snacks, mixer (e.g. soda, juice), ice, bitters, etc. (open-end)*

What would motivate you to switch to a different brand?

1. Price and Value 30% (375 responses)	2. Quality and Taste 25% (312 responses)	3. Variety and Innovation 15% (187 responses)	4. Brand Reputation and Trust 10% (125 responses)	5. Health and Wellness Claims 10% (125 responses)	6. Availability and Accessibility 5% (62 responses)	7. Social Influence and Recommendations 5% (62 responses)
"If a different brand offers a better price." "I would switch for a good discount." "If I find a cheaper alternative that tastes good."	"If I find a brand that tastes better." "I would switch for higher quality ingredients." "Quality matters; I'd try a brand that's more flavorful."	"I would switch for new flavors or types." "If a brand has unique offerings, I'd consider it." "Variety is important; I like to try different things."	"I would switch if the brand has a good reputation." "Trust matters; I'd try a brand that's well-reviewed." "If a brand has positive endorsements, I'd consider it."	"I'd switch for a healthier option." "If a brand offers organic ingredients, I'm interested." "Health claims would motivate me to try something new."	"If it's easier to find, I'd switch." "Availability matters; I'd try a brand that's in stores near me." "I'd switch if it's sold at my local store."	"If my friends recommend a brand, I'd try it." "I'd switch if I hear good things from others." "Social influence matters; I trust my circle's opinions."

New question in 2024. Select open-ends shown above.
Data Source: 2024 BACi Consumer Study. *Total respondents, n=1,250.*
Q510. What, if anything, would cause you to switch to a different brand of [INSERT CATEGORY]? *Please be as specific as possible in your response.*

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