



***Mystery
brand x***

Quantitative Insights

SUMMER SURVEY

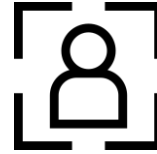
September 2020

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Sample Frame

x's CRM database



Overall Sample

675 people (10% response rate)

$n = 671$

Base

The number of respondents whose responses have been recorded. Excludes those who did not respond to the question



Key Insights & Recommendations

Key Insights



Slowing down

Having spent so much time at home in 2020, consumers have adapted to a slower pace of life. As well as nurturing connections with friends & family (32%), people are finding joy in low-stress activities like spending time in nature (30%).



Escapism

Respondents have had to make do with home-based activities this year, but there is evidence that long-term, getting away from it all remains important. Almost half still count travel among their top interests, while 51% choose to transport themselves elsewhere through a good book.



Home comforts

The most popular consumption occasions for x are low-key nights at home (25%) and catch-ups with friends (29%), suggesting that the days when the spirit is used for a communal celebratory toast are still some time away.



Shelfie worthy

People strongly resonated with x's flavour profile and fun, colourful branding (10% referenced this). Respondents praised the design of the bottle in particular, describing it as *"stylish"* and *"a non alcoholic drink that doesn't look like pop"*.

Recommendations



Resonance with the 'Light & Zesty' flavour palette

At present, consumers are expressing most affinity for the 'Light & Zesty' edition, with many associating x with being 'refreshing' & thirst-quenching.

While the timing of this survey means summer is top of mind for many consumers – and so fresh flavours are a priority, as demonstrated by the desire for non-alcoholic mojitos in Q9) – x will need to adapt its identity for the 'Dark & Spicy' edition launch in November.

One approach here could be to build on the need for 'grown-up' non-alcoholic spirits, something a number of respondents praised x for providing. Complex, spicy flavour notes lend themselves well to this profile.



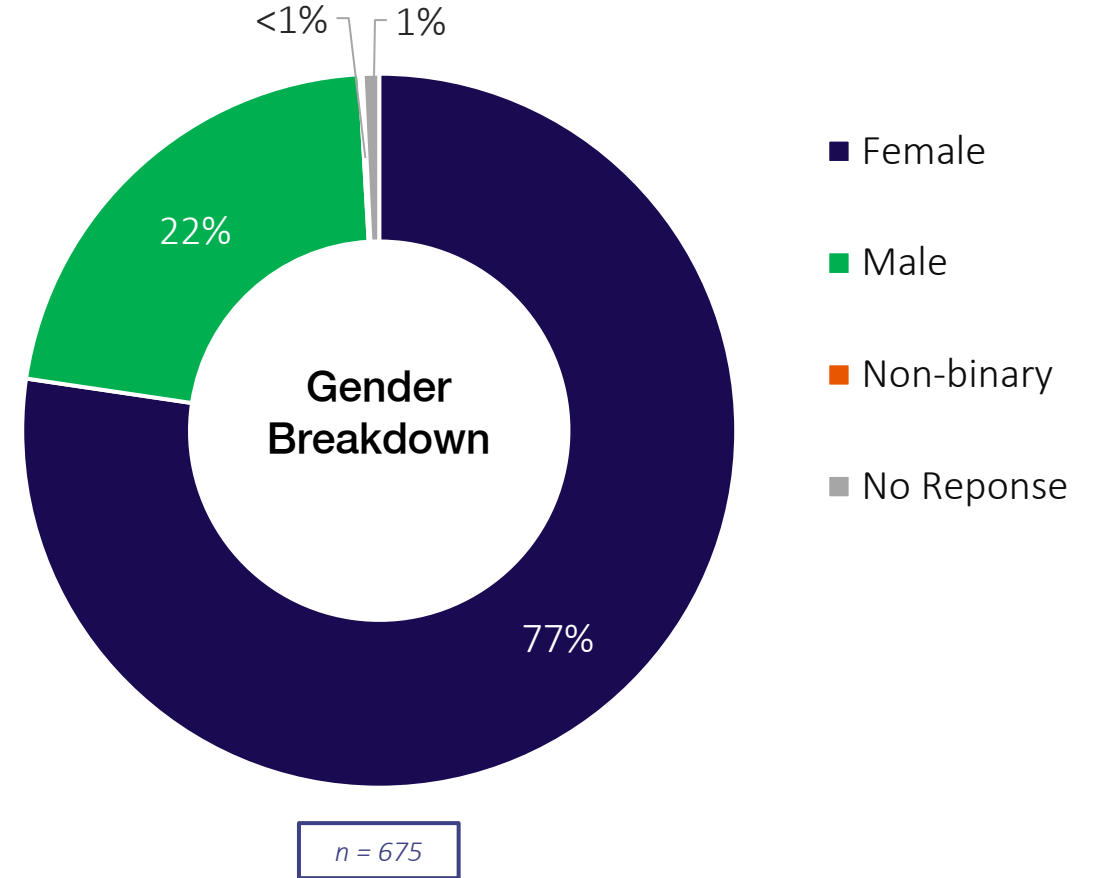
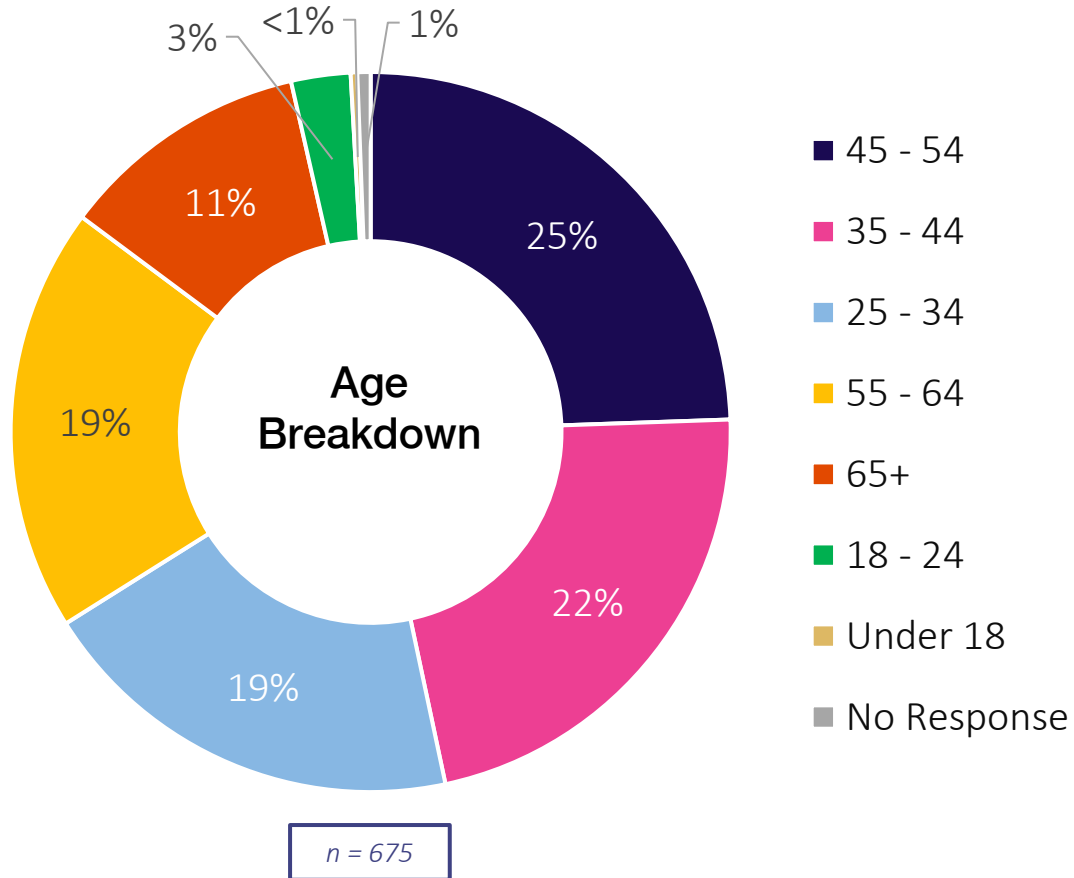
Spotlighting versatility

The nature of 2020 means most consumers are still drinking at home, and those 'higher tempo' occasions aren't as common in the short-term; indeed, a quarter of x drinkers are enjoying it during quiet nights at home. x should also highlight how versatile it can be, both in an occasion and seasonal context.



Detailed Insights

Survey Sample Demographics

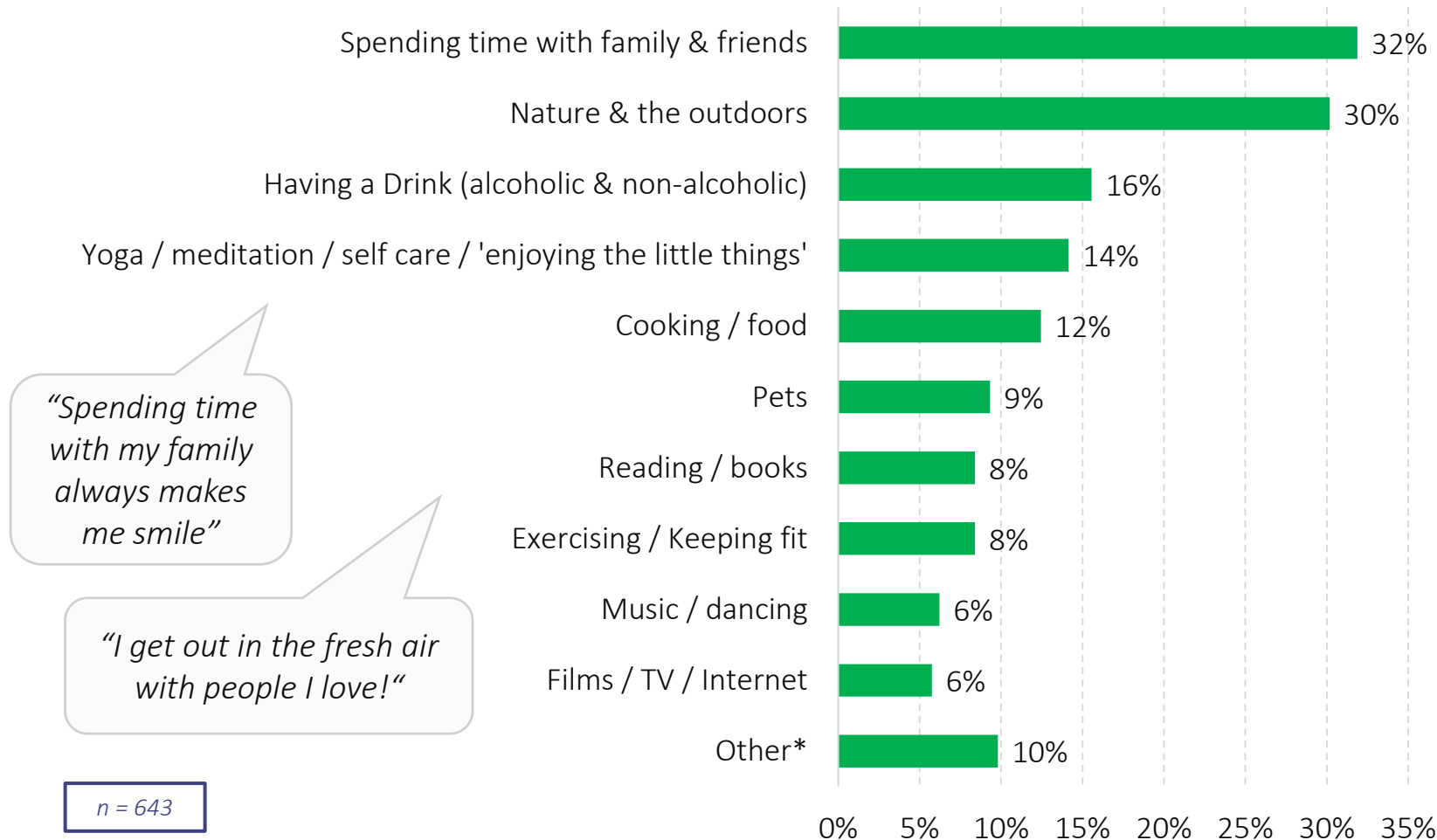


Q1 & Q2 Age & Gender

*Includes sample units who did not respond to question

'Slow' living sparks joy among respondents

Question 3: It's been a challenging time for us all, how do you bring joy to your day?

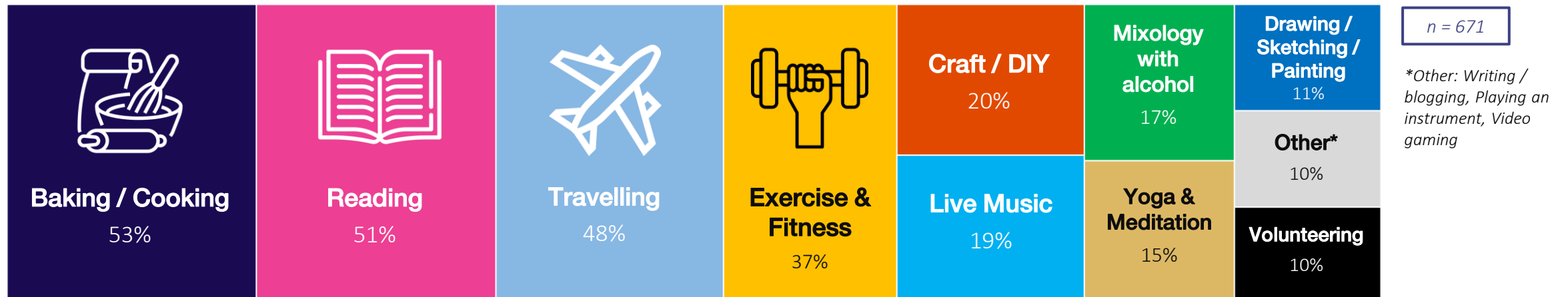


- Activities that prompted most joy reveal how respondents may have been managing stress during the COVID-19 lockdown. 'Slow' practices, like cooking, yoga and taking a walk were high on people's agendas.
- Almost a third of respondents cited **spending time with friends and family (in person, or virtually)** as the top thing that gave them joy – something that has been challenging with social distancing.
- A further 30% referenced **nature and outdoor activities** – such as spending time in the garden, listening to the birds singing or going for walks – as favourites.

*Other: Humour/Kindness, Creative pursuits, Work / learning

Baking / Cooking, Reading & Travel are enjoyed by half the surveyed group

Question 4: What are your 3 favourite hobbies?



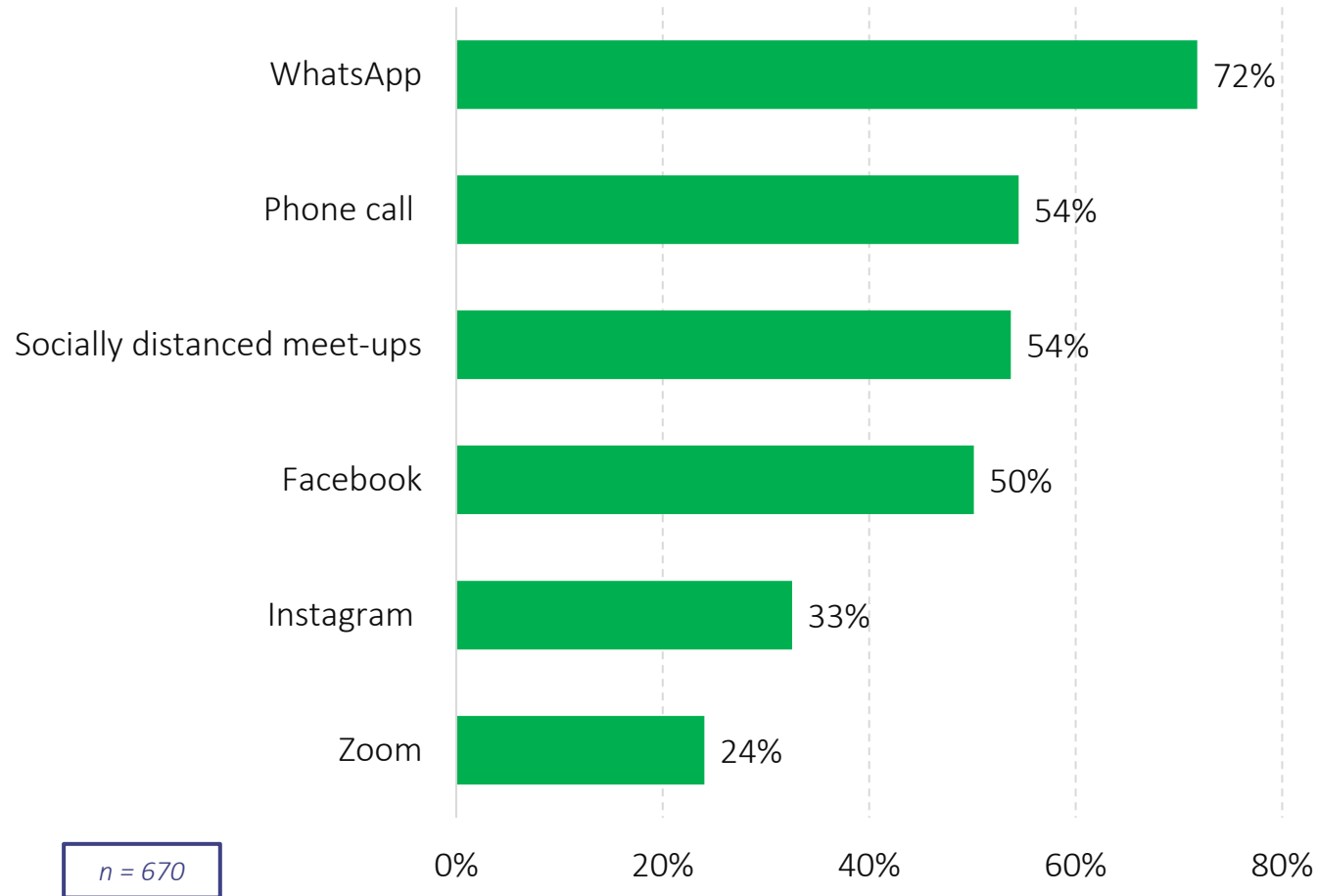
Baking / Cooking was most popular among the younger demographic groups: 89% of 18-24 year olds named it one of their three hobbies, and 59% of 25-34s.

Reading, by contrast, was much more popular among the over 55s. 79% of respondents aged 65+ (who make up 11% of the sample) enjoy this. This compares to just over a third of the 25-34 group.

A similar proportion of respondents considered **Mixology with alcohol** a hobby (17%) as found joy in having a drink (16%), though this included alcoholic and non-alcoholic beverages.

WhatsApp is used widely – across age groups – to connect with friends

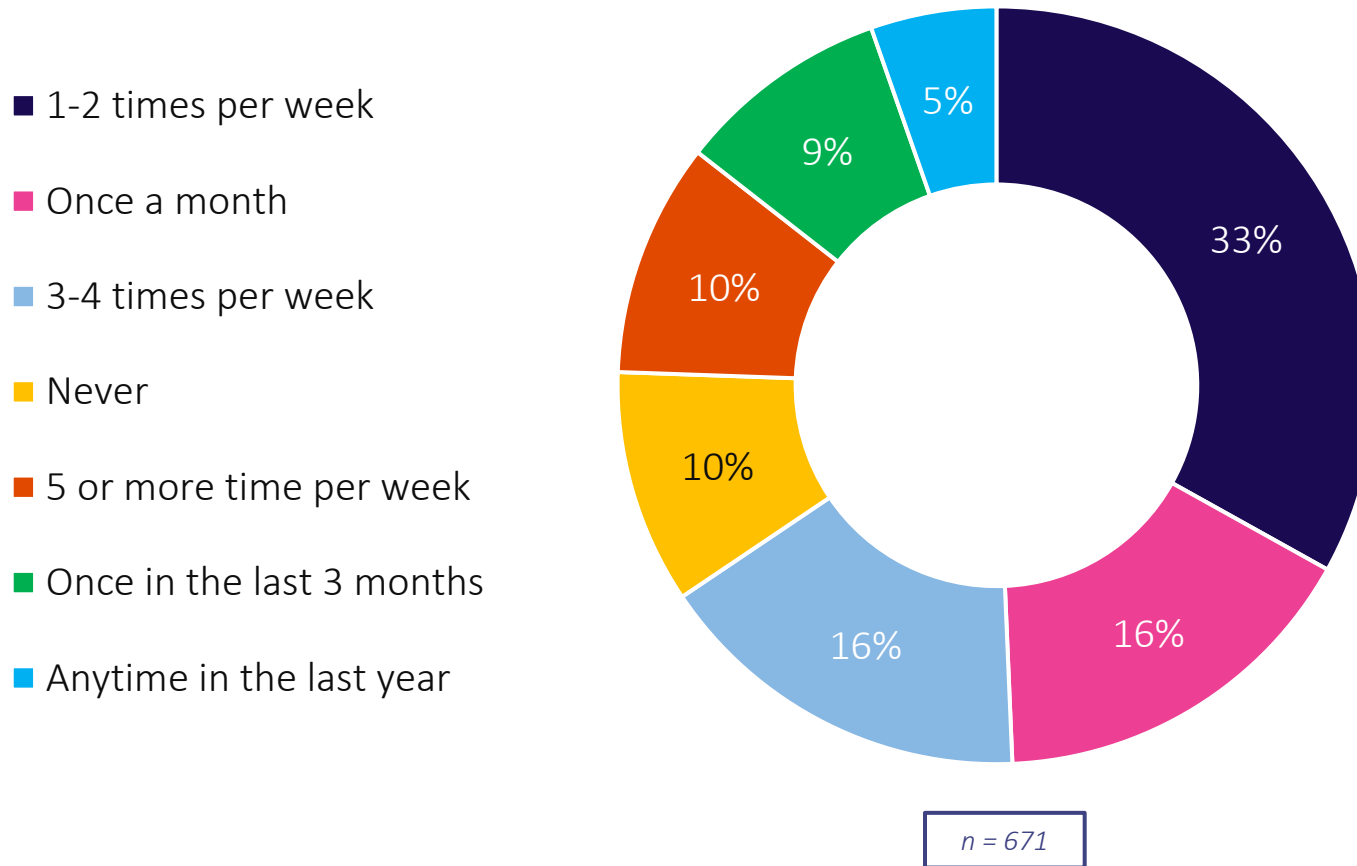
Question 5: What are your 3 favourite ways of connecting with friends?



- **WhatsApp** emerged as the most popular way for respondents to keep in touch with friends. The messaging app was used widely by all age groups (at least 70% of each age segment).
- Half of all respondents used **Facebook** to connect with friends. This was most relevant among those aged 35-64 years old, with 54% using the platform for this. Time spent on the site also facilitated brand discovery: 35% of respondents who connect with friends via Facebook also found x this way.
- Many of those who connect with friends via **socially distanced meet-ups** also reported that spending time with family & friends brought joy to their day (ref: Q3). 16% of those who do this also find joy in taking walks, often with others – a key way of maintaining connection during socially distanced times.

59% consume non-alcoholic spirits at least weekly

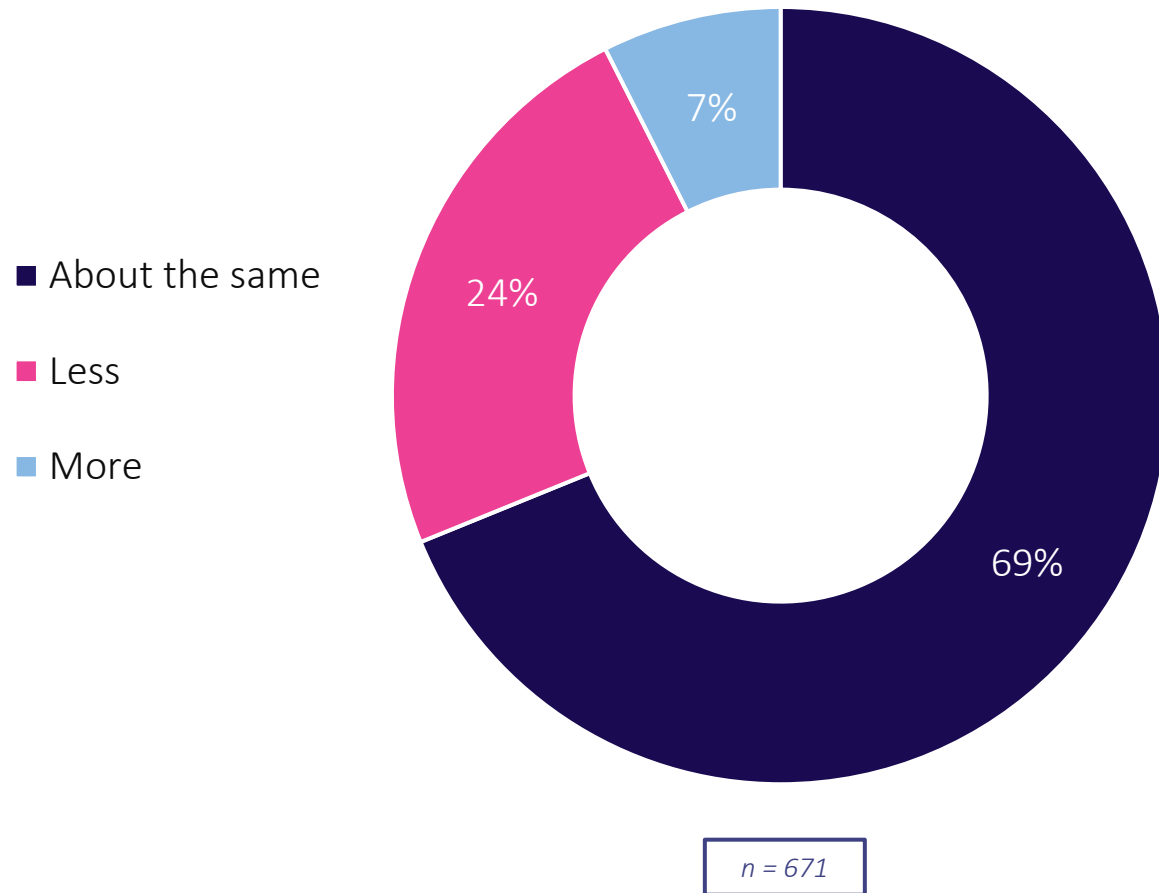
Question 6: How often are you drinking non-alcoholic spirits?



- A large number of respondents were fairly regular consumers of non-alcoholic spirits [note: bias may be a factor here, as the sample was drawn from x's database]. **75% consume these products at least monthly, and 59% weekly**, with the most common usage frequency being 1-2 times per week (33%).
- More than a third (36%) of those who 'Never' drink non-alcoholic spirits reported that they have not yet tried x.

Most are looking to maintain or reduce their alcohol consumption

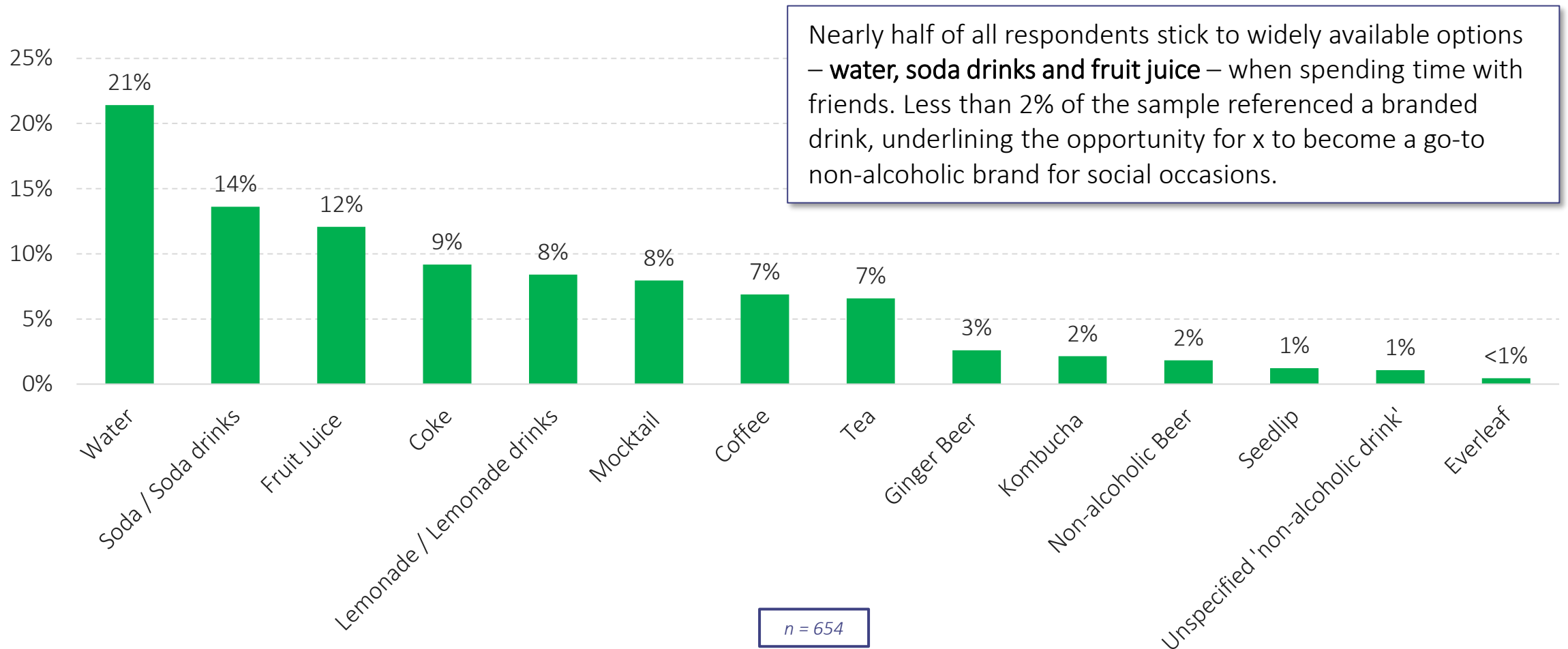
Question 7: Now that lockdown has lifted will you be drinking more or less alcohol?



- The vast majority of respondents signalled their intention to maintain their current level of alcohol consumption (69%).
- Three times as many people planned to reduce their alcohol intake as considered increasing it. Those aged 35-44 showed greatest intent to cut down on alcohol, accounting for 27% of those interested in doing this.

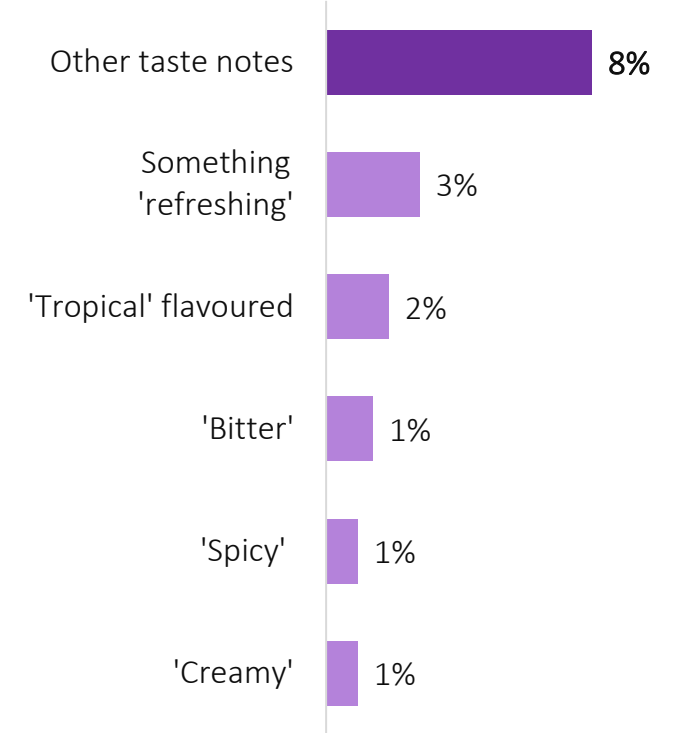
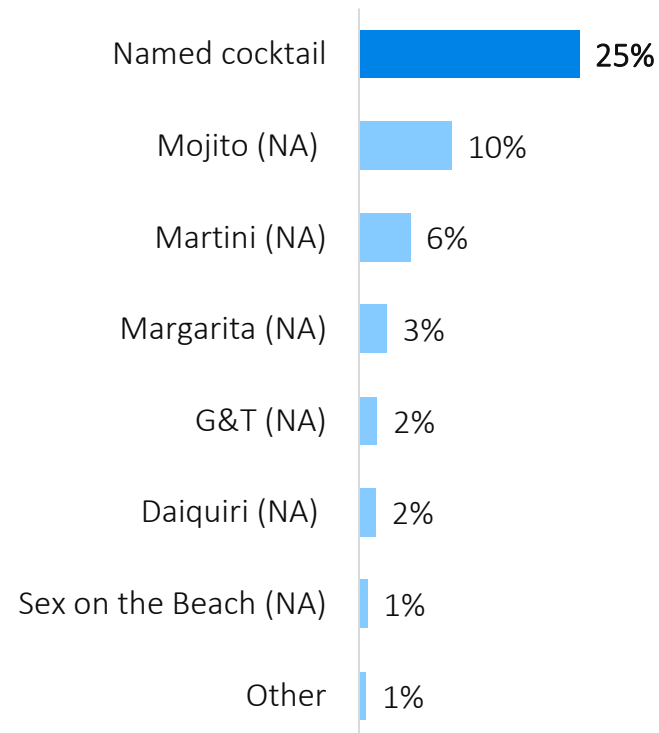
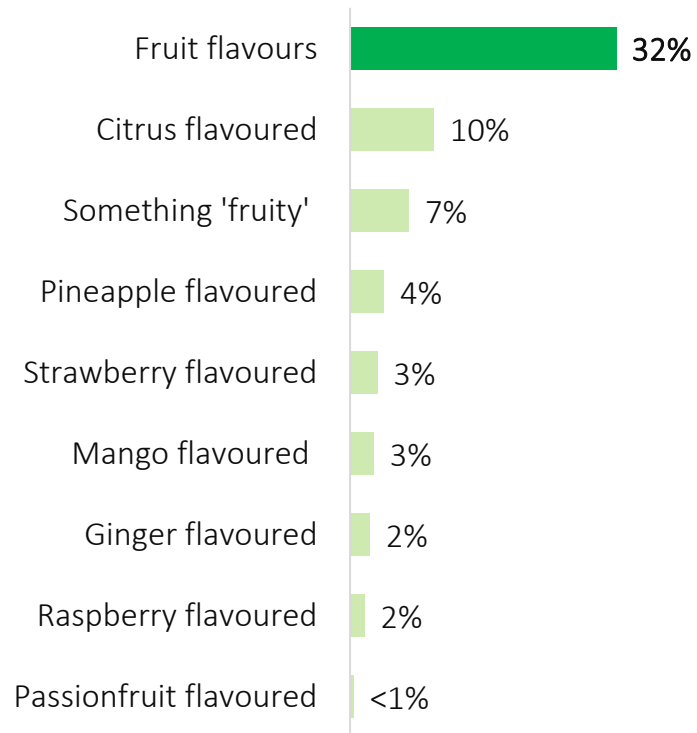
Sober & Mindful drinkers limit themselves to water when out (or in) with friends

Question 8: When you're out (or in) with friends & don't fancy alcohol, what do you like to drink?



32% dream about fruity cocktails, with mojitos & citrus flavours holding appeal

Question 9: What would be your dream non-alcoholic cocktail?



n = 641

Taste & flavour are big draws, but consumers also love x's branding

Question 10: What do you like about x?



A sophisticated non-alcoholic spirit: *“Delicious! Tastes grown up”*

Taste



“It is so refreshing with a tropical taste and it reminds me of drinking a pina colada”

“It has a very distinctive taste, very flavourful but still reminiscent of gin. It’s just the perfect AF adult drink and really hits the spot”

Versatility



“Its versatility. I like that you can have it with sweet things and/or bitter accompaniments”

Unprompted, most respondents cited x’s flavour. 34% indicated general affinity for its taste (i.e. “delicious”), while 18% went further, praising its ‘tropical’ and ‘refreshing’ characteristics. 7% also thought it tasted ‘different’ or ‘unique’.

In addition, many appreciated that x offers a ‘grown-up’ alternative for non-drinkers.



Bottle / Packaging / Branding

“I like that it tastes grown up and the bottle looks beautiful in my drinks cabinet”

“Biggest selling point for me is the branding and the vibrant colours it stands out from the rest”

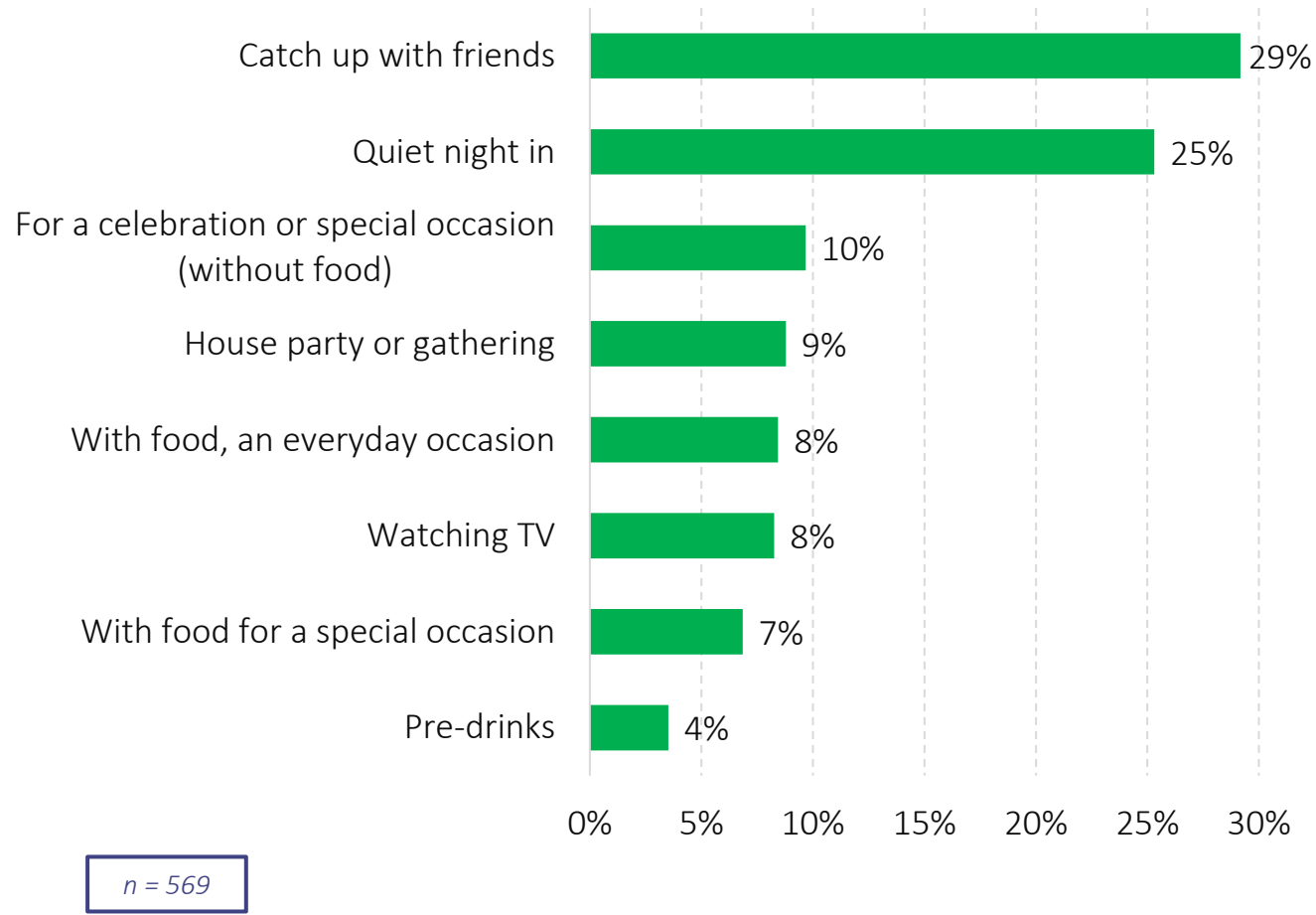
No FOMO



“I can enjoy a drink with the girls without worrying about a hangover”

x sees most consumption in smaller, more intimate settings

Question 11: On what occasions do you drink x?

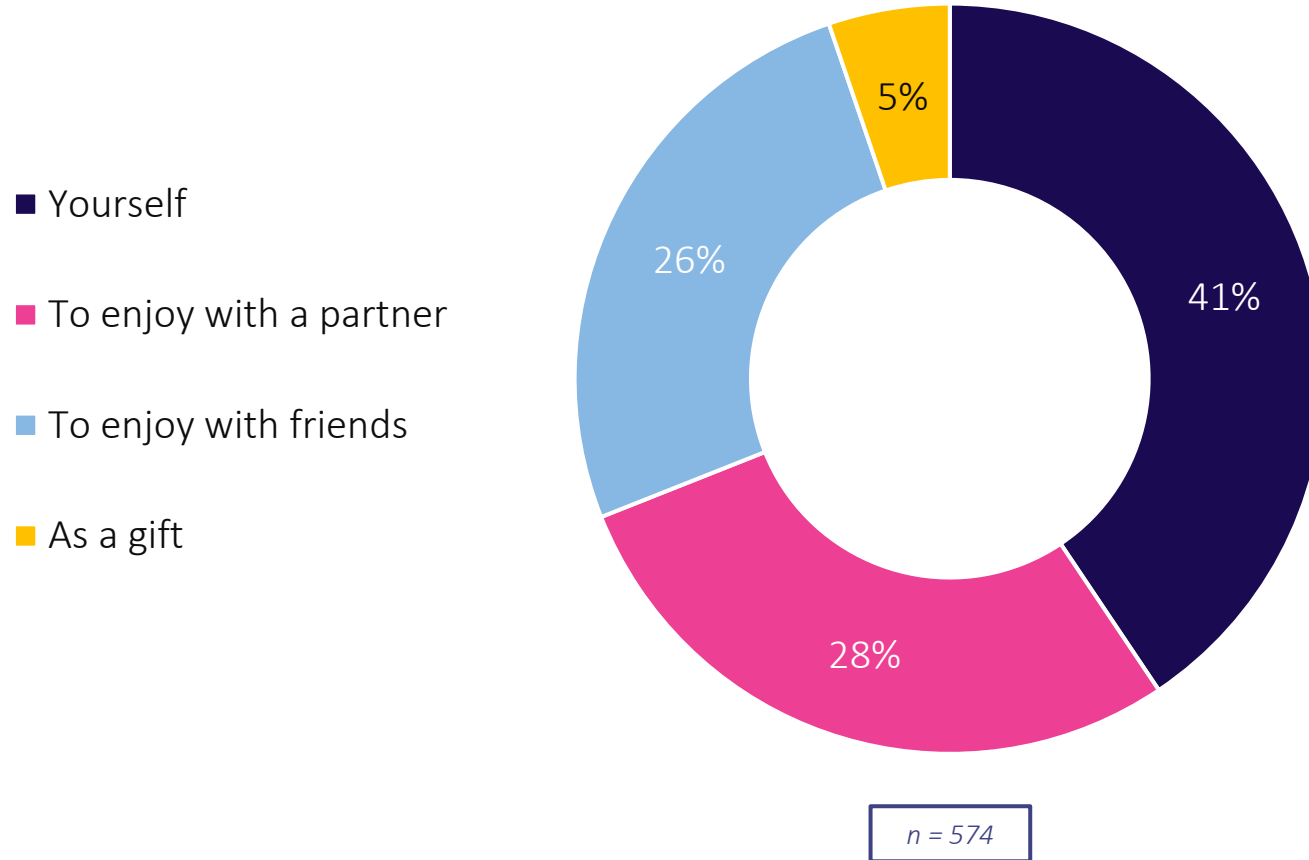


**excludes respondents who have not tried x*

- **x tended to be consumed in more intimate settings:** 29% of respondents drank it when catching up with friends, while a quarter saved the spirit for quiet nights in.
- **Younger consumers were most likely to drink the spirit at home:** a third of 18-24 year olds did this. Meanwhile, the same proportion of those aged 25-44 consumed it during catch-ups with friends – the most popular occasion for this demographic.
- Based on these results, there is **little evidence that x gets paired with food**, despite respondents' enthusiasm for cooking. Just 8% consumed it alongside food during everyday occasions, and 7% did this on special occasions.

Most purchase the spirit for personal consumption

Question 12: Who do you buy x for?

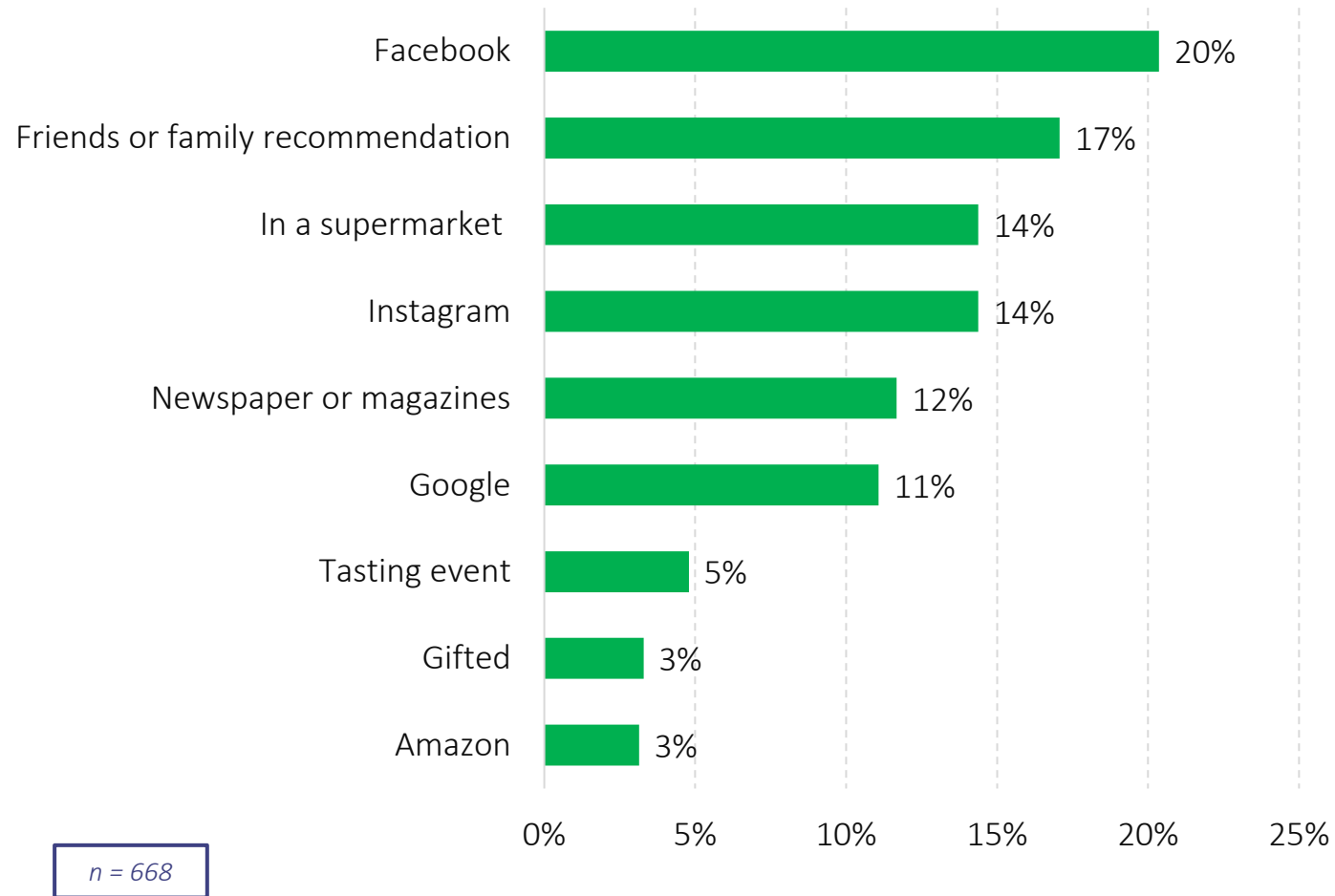


- The majority of those surveyed (41%) bought x for themselves. This could suggest that these individuals live in a household – or have a group of friends – where they are the sole non-drinker or mindful drinker.
- There was evidence, however, that couples are increasingly opting to forego alcohol together: 28% bought x to enjoy with a partner, just over a quarter of which was for a quiet night in and 23% was for friend catch-ups.

**excludes respondents who have not tried x*

Facebook is a key medium for brand discovery, but Instagram is popular among under 25s

Question 13: How did you find out about x?



- A fifth of respondents discovered x on Facebook, potentially indicating the success of marketing activity on this platform. While Instagram was a less impactful source of brand discovery (14% found out about the product this way), most under 25s (61%) encountered x here.
- Word of mouth was also a relatively successful form of customer referral. 17% discovered x in this way, which was visible across all age segments.

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