



# BRANDS IN ***MOTION***

ALCOHOL CATEGORY

# ALCOHOLIC BEVERAGE **CATEGORY**



## ALCOHOLIC BEVERAGE:

Category defined as: Including beer, wine, and spirits.

The category was surveyed in 3 of the 6 markets (Wave 1).

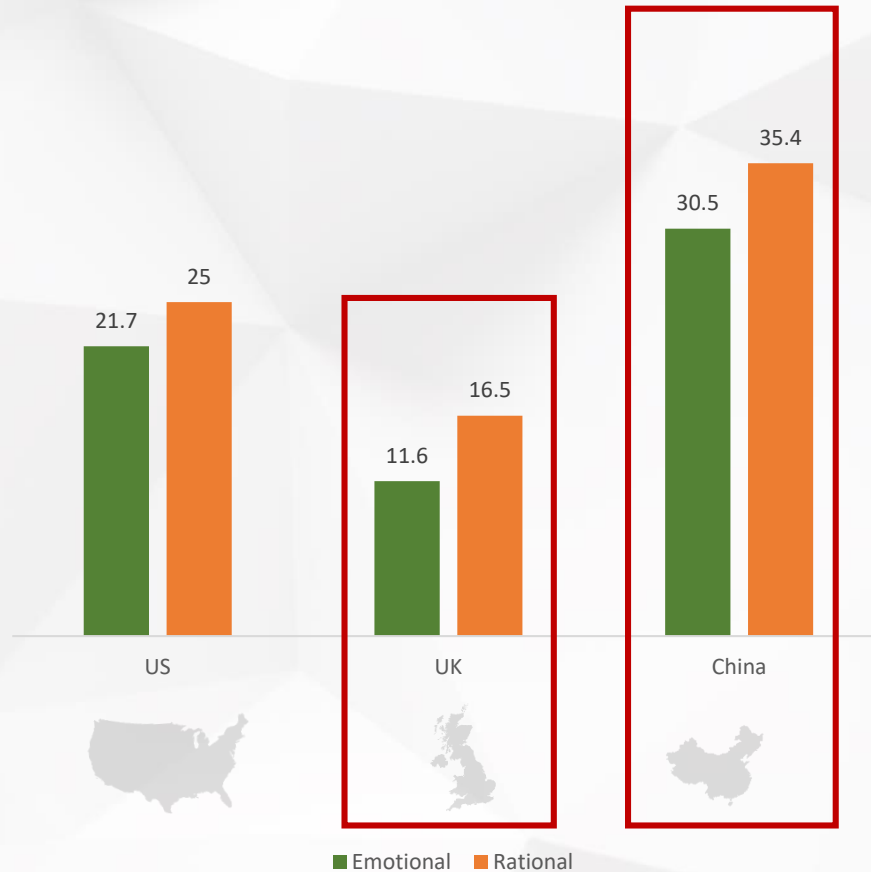
The category is seen as a survivor in the markets surveyed, based on the average emotional and rational responses of those surveyed.

A total of 2,056 people answered questions specific to the Alcohol category across the three markets.

(US:655, UK:871, China:530)



# GLOBAL VIEW: **ALCOHOLIC BEVERAGE**



## OBSERVATIONS

- Respondents in China demonstrated the most optimism for the category both rationally and emotionally with the highest average responses of any market surveyed.
- UK respondents showed the most skepticism for the category with the lowest average emotional and rational responses of any market surveyed.

Data represents an average respondent score on a scale of -100 to 100 across the ten category drivers. (6 Emotional and 4 Rational)

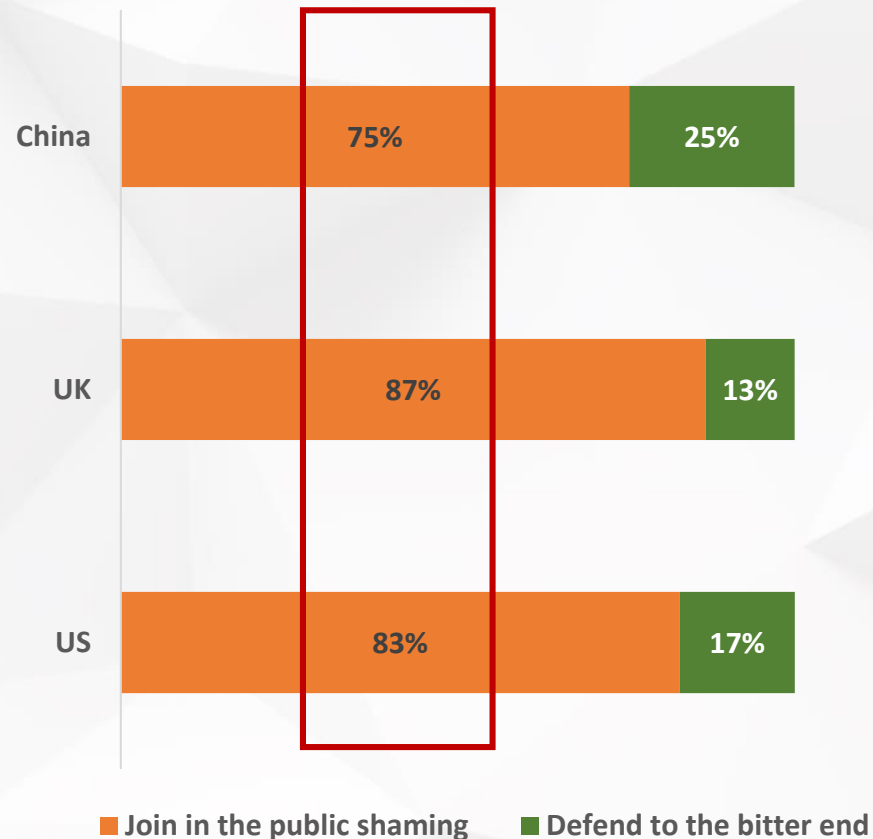




# BRANDS IN ***MOTION***

Emotional Drivers

# GLOBAL VIEW: **EMOTIONAL DRIVER**



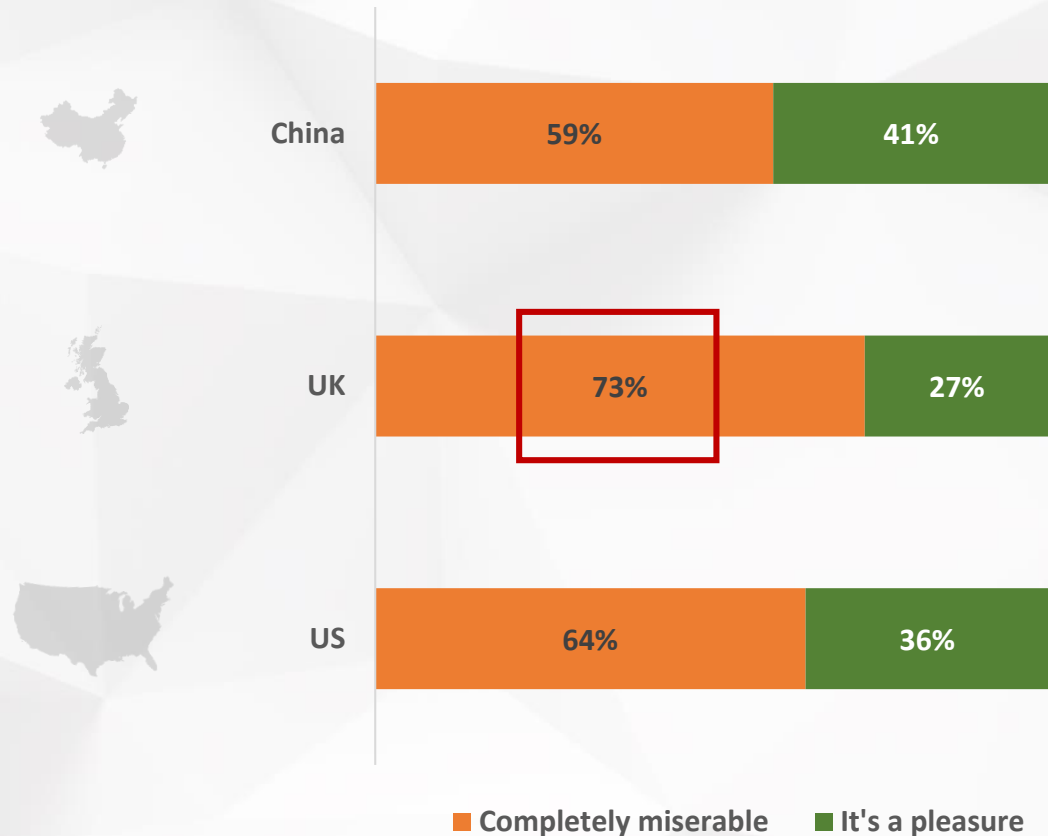
## DEFEND OR SHAME

Suppose a Alcoholic beverage company was publicly under attach for a product or service issue, would you?

More than  $\frac{3}{4}$  of respondents and nearly 9 out of 10 respondents in the UK said that they would "Join in the public shaming" if an Alcoholic beverage company was under attach for a product or service issue.



# GLOBAL VIEW: **EMOTIONAL DRIVER**



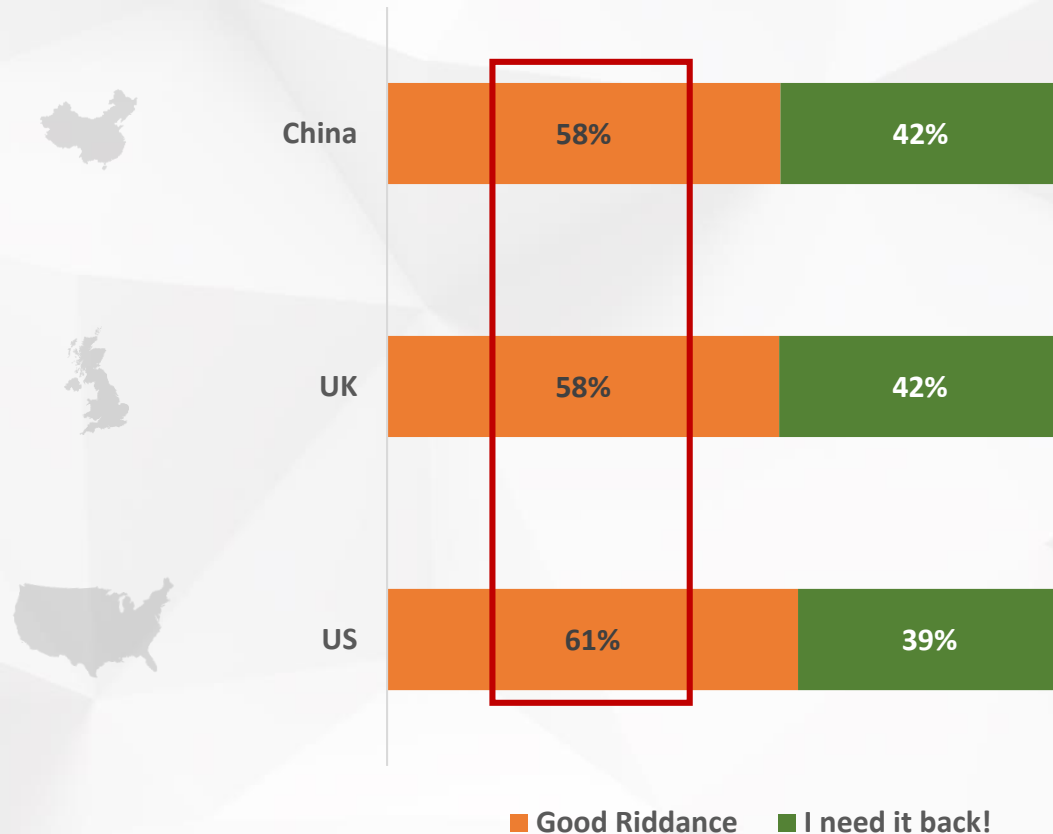
## EXPERIENCE

When interacting with Alcoholic beverage companies, generally how is the experience?

Respondents in the UK expressed the most displeasure with their experience with companies in this category with 73% of respondents responding "Completely miserable" when asked generally about the experience.



# GLOBAL VIEW: **EMOTIONAL DRIVER**



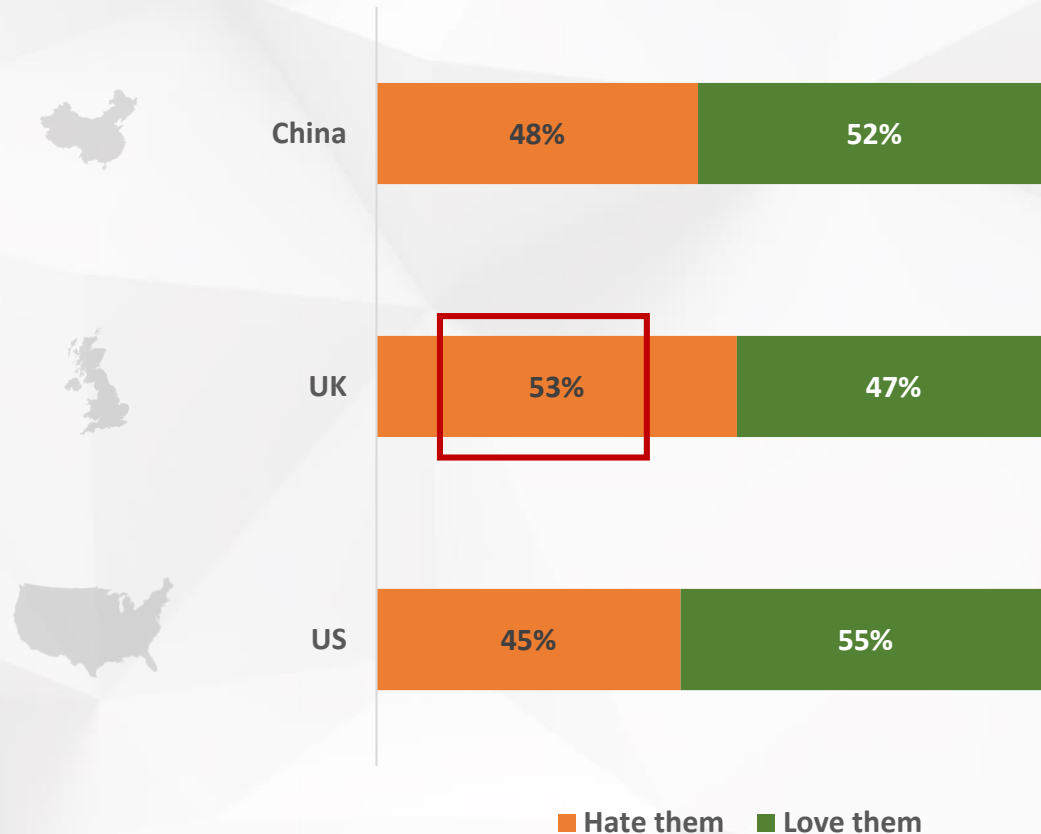
## DISAPPEARED

If the Alcoholic beverages were to one day just disappear, how would you feel?

Respondents in all three markets express similar emotional attachment towards this driver with nearly 60% of respondents responding with “Good Riddance” when asked how they would feel if alcohol was to one day just disappear.



# GLOBAL VIEW: **EMOTIONAL DRIVER**



## LOVE/HATE

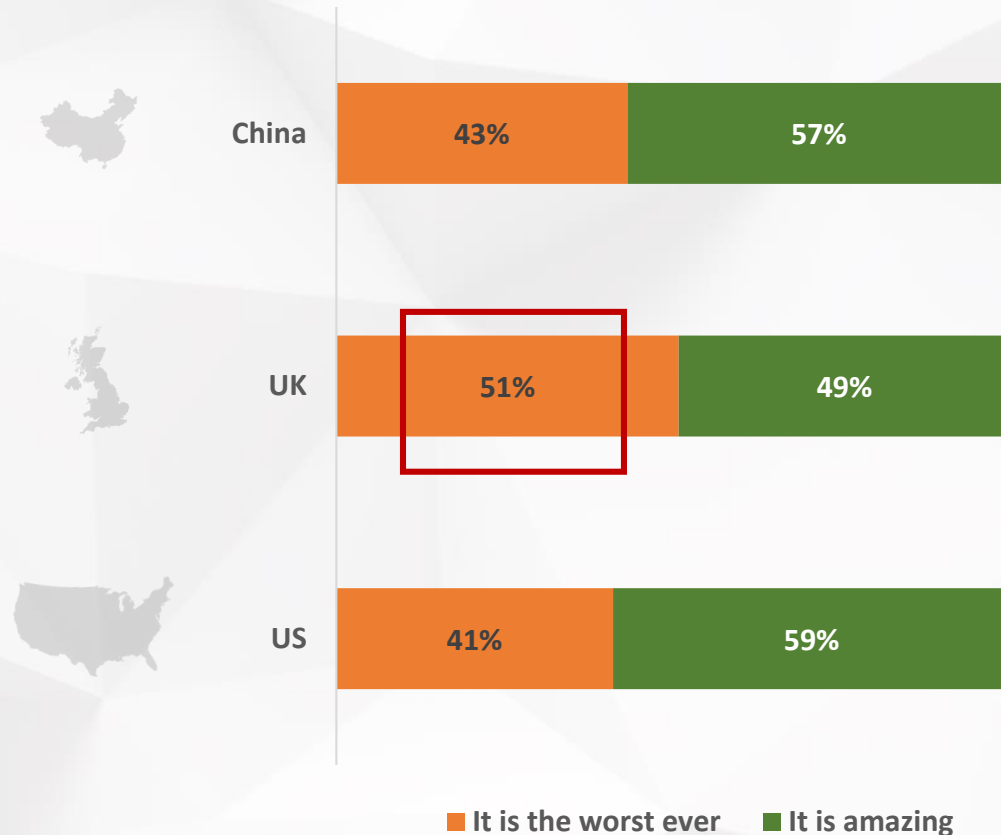
When thinking about Alcoholic beverage do you generally...?

Respondents in the UK were the only market to have over 50% reply "Hate them" when asked if they love or hate alcoholic beverage.





# GLOBAL VIEW: **EMOTIONAL DRIVER**



## OVERALL IMPRESSION

What is your overall impression of Alcoholic beverage companies?

51% UK respondents felt the overall impression of Alcoholic beverage companies is "...the worst ever".

In the US and China nearly 6 out of 10 respondents overall impression of Alcoholic beverage companies was "Amazing".



# GLOBAL VIEW: **EMOTIONAL DRIVER**



## SOCIAL IMPACT

When thinking about Alcoholic beverage companies, what is their overall impact on society?

Nearly 80% of respondents in US and UK and 64% in China responded "Does harm" when asked about their overall impact on society.

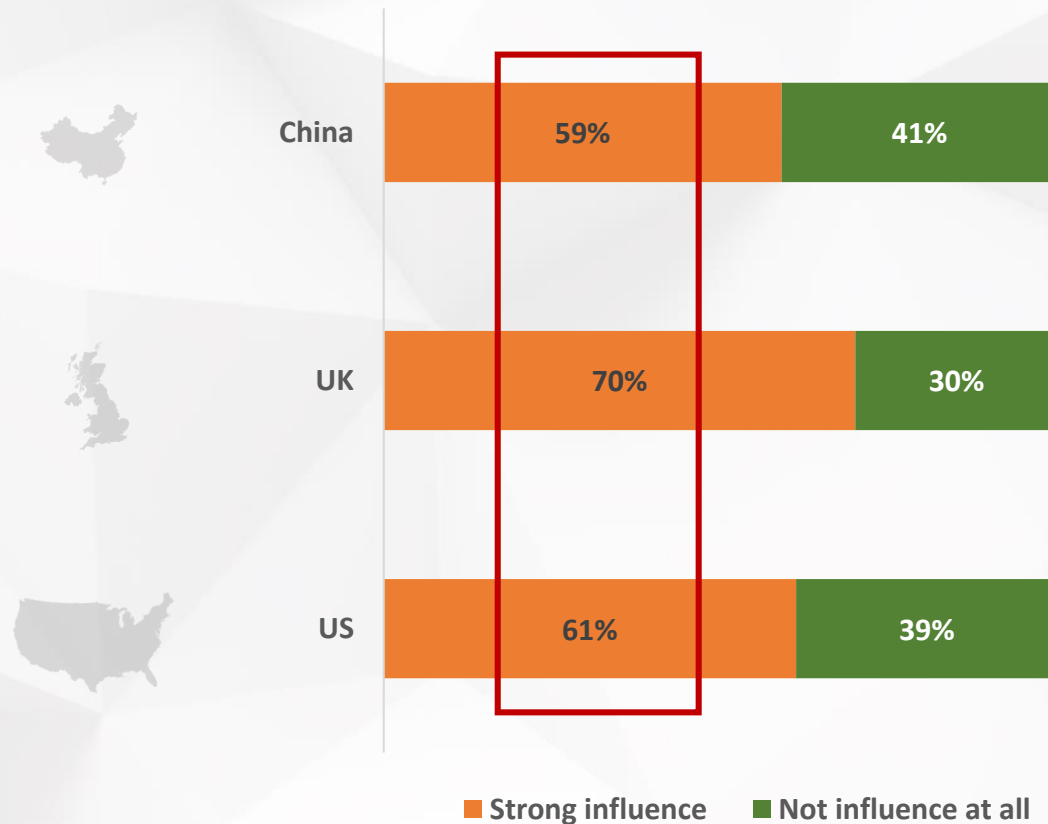




# BRANDS IN ***MOTION***

Rational Drivers

# GLOBAL VIEW: **RATIONAL DRIVER**



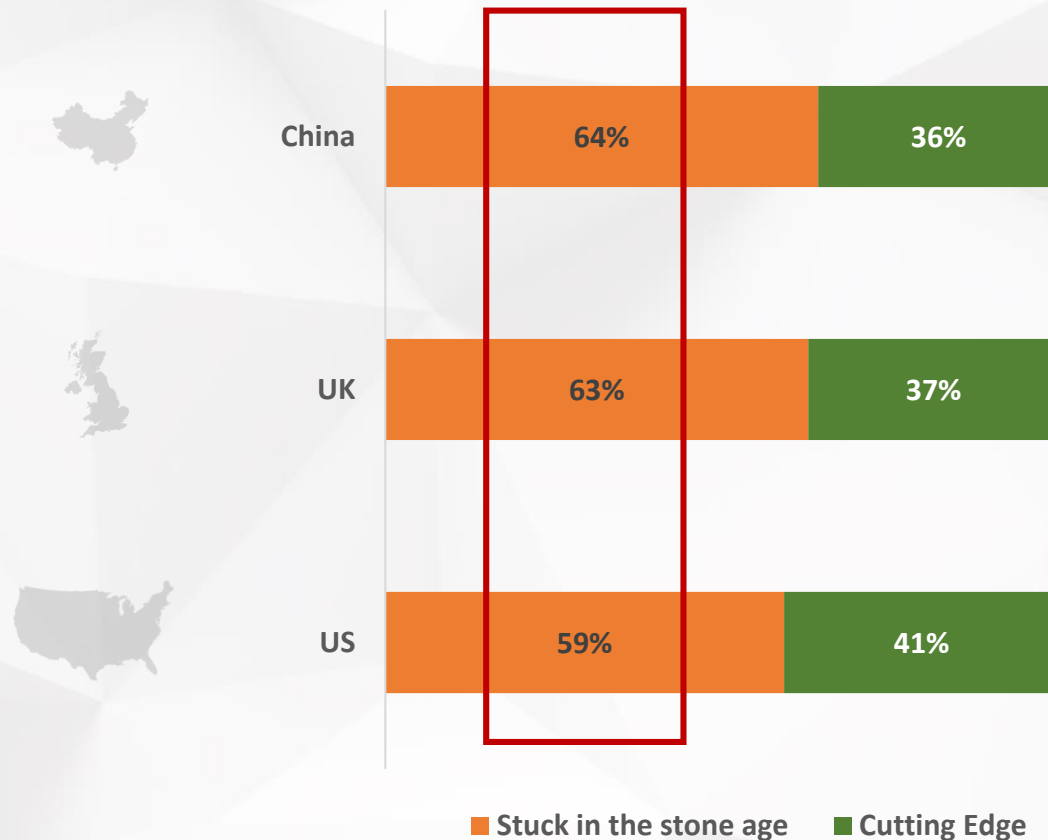
## EXECUTIVE BEHAVIOUR

Would the behaviours of the executive leaders of a company in the Alcoholic beverage industry influence your decision to support the brand or not?

Over 50% or majority of respondents in all three markets responded with “Strong Influence” when asked about the behaviours of the executive leaders having influence over supporting a brand or not.



# GLOBAL VIEW: **RATIONAL DRIVER**



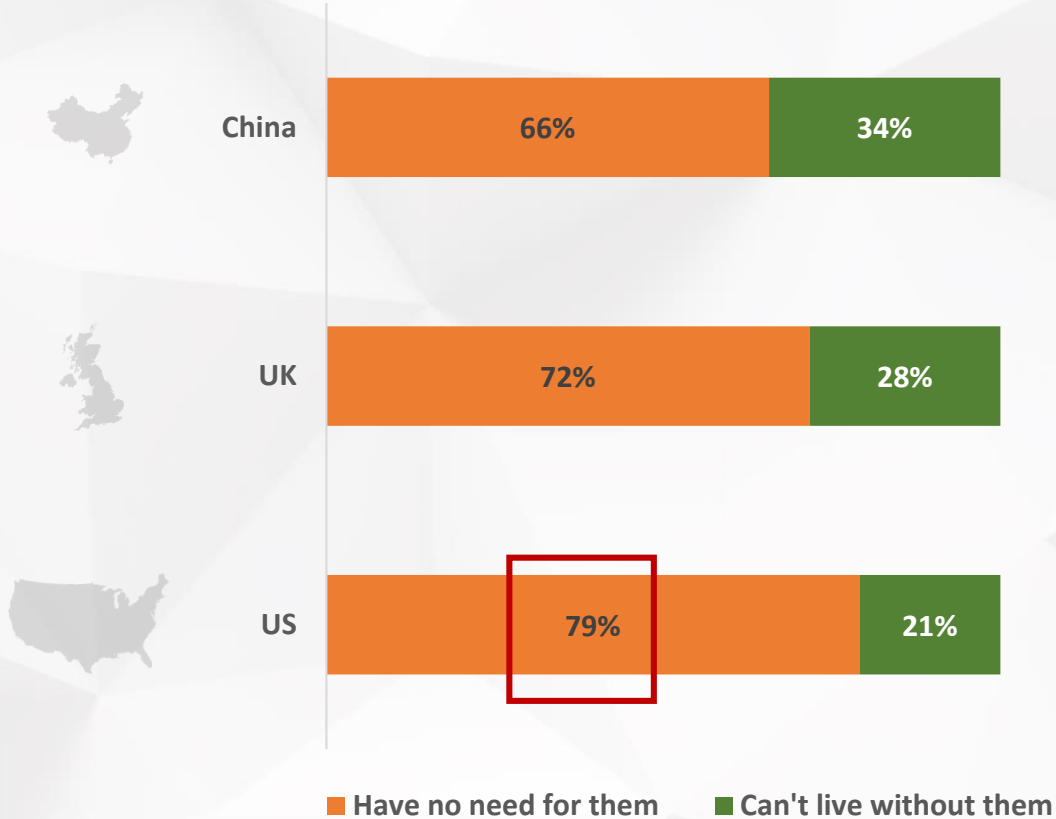
## INNOVATION

How innovative are Alcoholic beverage companies?

Over 50% or majority of respondents in all three markets responded with “Stuck in the stone age” when asked about how innovative are Alcoholic beverage companies.



# GLOBAL VIEW: **RATIONAL DRIVER**



## NECESSARY

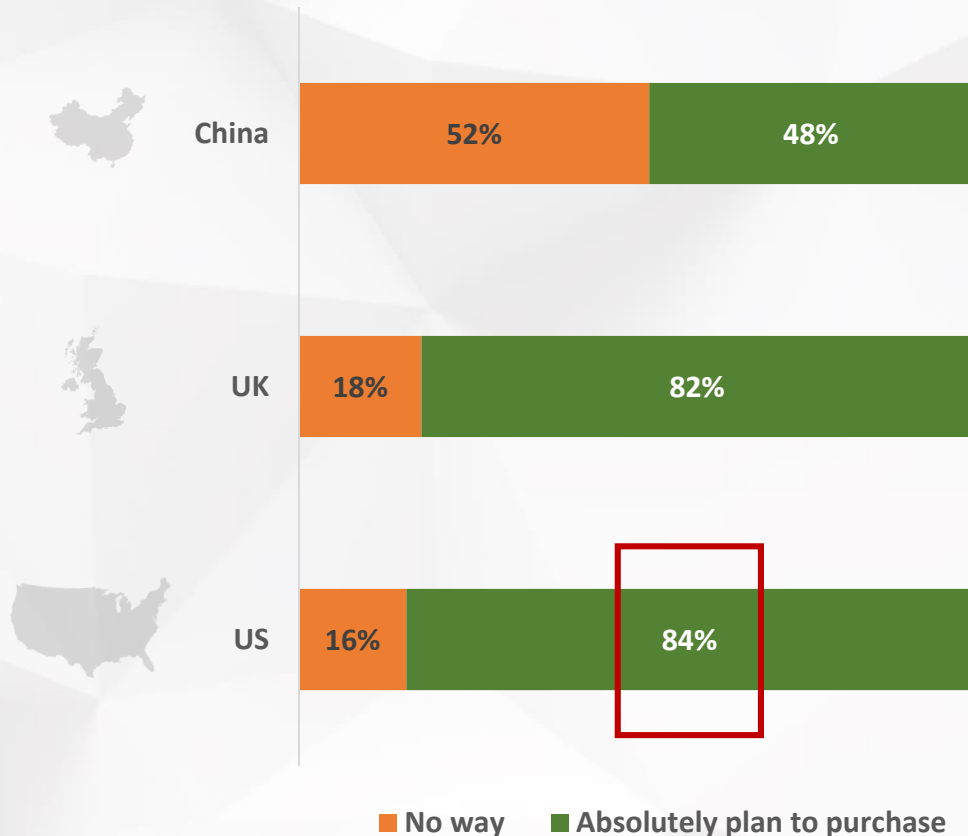
How necessary are Alcoholic beverage companies to your life?

Over 50% or majority of respondents and as high as 79% in the US responded with "Have no need for them" when asked how necessary alcoholic beverage companies are to their lives.

Percentages represent the percent of respondents who responded above or below the average emotional score by market.



# GLOBAL VIEW: **RATIONAL DRIVER**



## INTENT TO PURCHASE

How likely are you to purchase products or services from Alcoholic Beverage companies in the next year?

- Respondents in the US indicated the highest intent to purchase at 84%.

