provoke

insights

Alcoholic Beverages:
2021 Brand Equity & Trends Research

Background & Objectives

As the United States has approached year two of living through the pandemic, habits and routines have been unrooted. As people are stay at home more, there is an accelerated rate of technology adoption. People are still shopping, but how and what they purchase is modified from wearing a mask to buying more online.

In this changing environment, companies now more than ever need to understand their brand equity, consumer purchasing habits, and trends that impact their industry.

Provoke Insights, a full-service market research firm specializing in branding, advertising, and content marketing initiatives, developed the brand equity report to answer these pressing questions.
The goal of the research is to gain a national perspective on the mindset of consumers. The study covers 19 industries, including alcoholic beverages.

Methodology

Provoke Insights conducted a 15-minute survey among 3,000 Americans between the ages of 21 and 70. The study was in-field from January 18th to February 3rd, 2021.

A random stratified sample methodology was used to ensure a high degree of representation of the U.S. population (household income, age, gender, geography, ethnicity, and children in the household).[1]

Results based on this sample have a maximum margin of sampling error of ±1.78% at a 95% confidence level.

Statistical differences between subgroups indicated in this report were tested at a 95% confidence level.

https://data.census.gov/cedsci/table?q=general%20population&tid=ACSDP1Y2018.DP05&vintage=2018

Overview

Unaided Awareness

Beer brands lead for top-of-mind awareness in the alcoholic beverage category. Budweiser, followed by Bud Light and Coors Light, have the highest unaided recall for the category. Smirnoff, Bacardi, Hennessy, and Crown Royal are the liquor brands that top unaided recall.

Brand Equity

Compared to other categories, the alcohol beverage category is perceived as less innovative and fitting the needs of consumers. Exceptions include the brands Grey Goose and Heineken which received the highest brand equity score.

Purchasing Alcoholic Beverages

Around one-third of Americans have purchased an alcoholic beverage in the last three months. They are more likely to be millennials with children and have a household income above $100K. Men are more often buying beer and liquor. Those who drink alcohol are more optimistic than the US population; this is particularly true of wine drinkers.

Retail Distribution of Wine

The majority of shoppers are buying wine in-store; this is particularly true among those with a lower household income. Interestingly, a quarter of consumers are now buying wine online through a retail store’s website. Purchasing wine via this method is more common among millennials, consumers with children living in the household, and people with higher household incomes.

Top Alcohol Beverages

	Brand	Unaided Awareness	Brand Equity Score
1	Budweiser	13%	6.97
2	Bud Light	5%	6.94
3	Coors Light	5%	7.27
4	Jack Daniel's	4%	6.83
5	Corona	4%	6.35
6	Miller	4%	7.26
7	Smirnoff	3%	7.24
8	Bacardi	3%	5.89
9	Hennessy	3%	7.85
10	Crown Royal	3%	7.86
11	Heineken	3%	8.00
12	Grey Goose	2%	8.08
13	Captain Morgan	2%	6.89
14	Patrón	2%	6.69
15	Seagram's Gin	2%	7.84

Both Budweiser and Bud Light have the highest awareness. Grey Goose has the highest brand equity.

How to Read This Chart

There are two scores. The first score is unaided brand awareness.

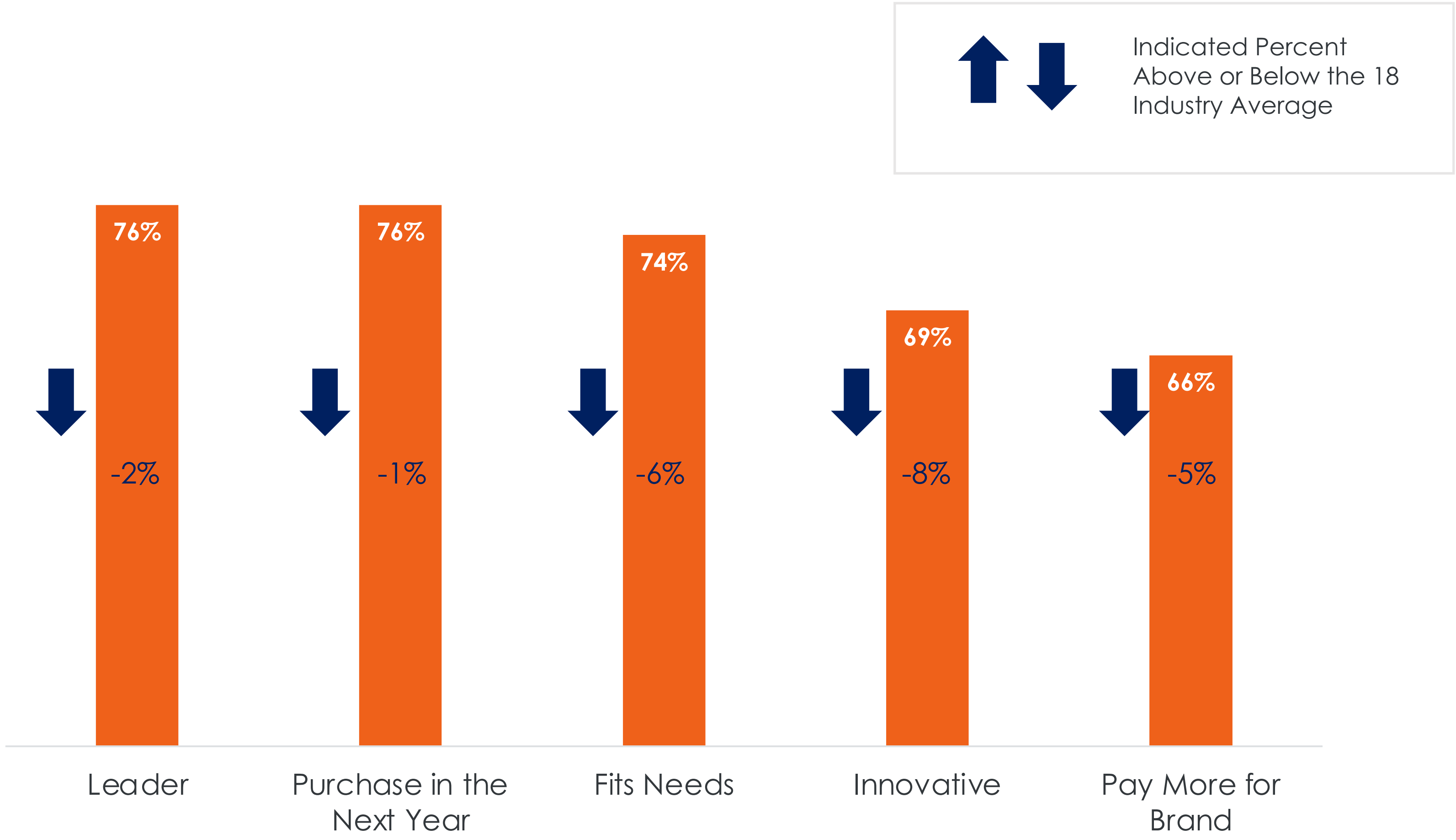
The brand equity scores are calculated by averaging the ratings for leadership, innovation, fits needs, pay more, and likelihood to purchase in the next year. The attributes are rated on a ten point agree scale, where 1 is strongly disagree and 10 is strongly agree.

Q. When thinking about Alcoholic beverages, what Alcoholic beverages brand is top of mind?

Base: Shown question (n=448)

Brand Equity Drivers: Alcoholic Beverages

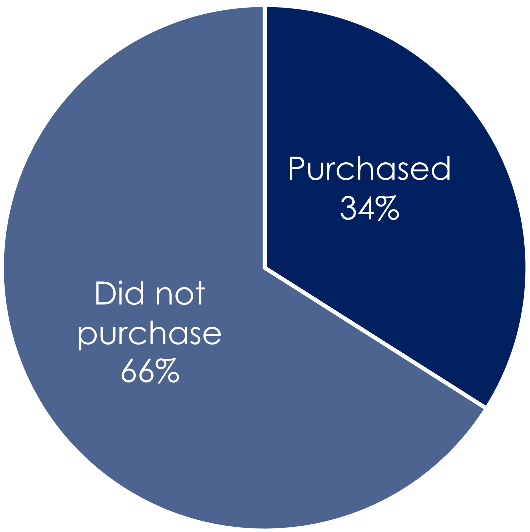
Alcoholic beverages rate below other industries when it comes to being labeled innovative, fitting needs of a consumer, and paying more for the brand.



Base: Consumers who received the question (n=448)

Q. Thinking about Beauty, how much do you agree or disagree with the following statements regarding (BRAND ANSWERED)? (Select one for each statement)

Current Wine Purchasing:



34%

of U.S. Consumers have purchased wine in the last three months

Wine enthusiasts are more likely to be:

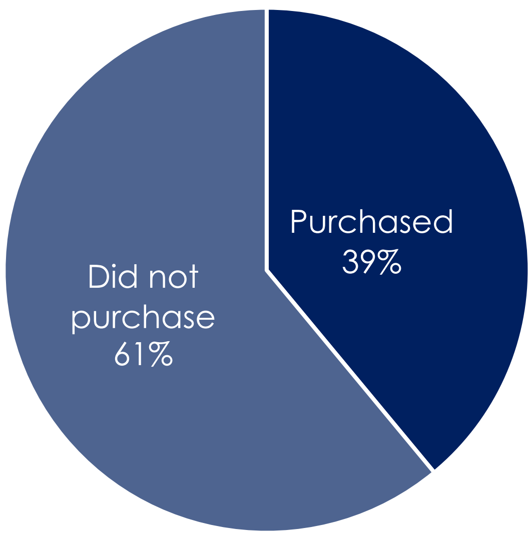
% that Purchase Wine

- HHI $100K+: 48%
- Northeast: 40%
- Have children: 38%
- Millennials: 37%
- Optimistic: 37%
- Employed: 37%

Q. Which of the following categories have you bought from/acquired in the last 3 months? (Select all that apply)

Base: All qualified respondents (N=3,000)

Current Beer Purchasing:



39%

of U.S. Consumers have purchased beer in the last three months

Beer drinkers are more likely to be:

% that Purchase Beer

HHI $100K+: 47%

Male: 46%

Millennials: 44%

Northeast: 43%

Have children: 43%

Gen X: 42%

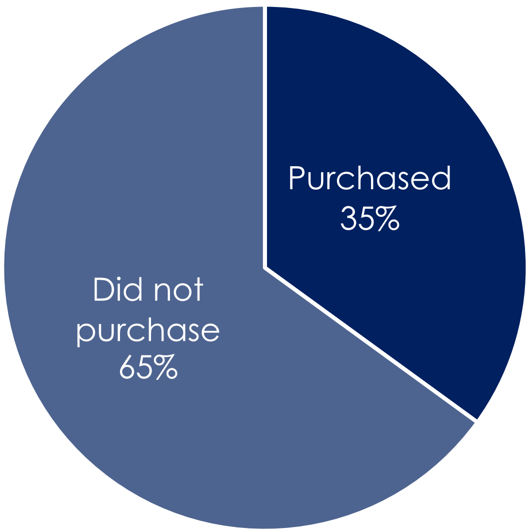
Employed: 42%

Optimistic: 41%

Q. Which of the following categories have you bought from/acquired in the last 3 months? (Select all that apply)

Base: All qualified respondents (N=3,000)

Current Liquor Purchasing:



35%

of U.S. Consumers have purchased liquor in the last three months

Liquor drinkers are more likely to be:

% that Purchase Liquor

HHI $100K+: 40%

Millennials: 39%

Male: 38%

Have children: 37%

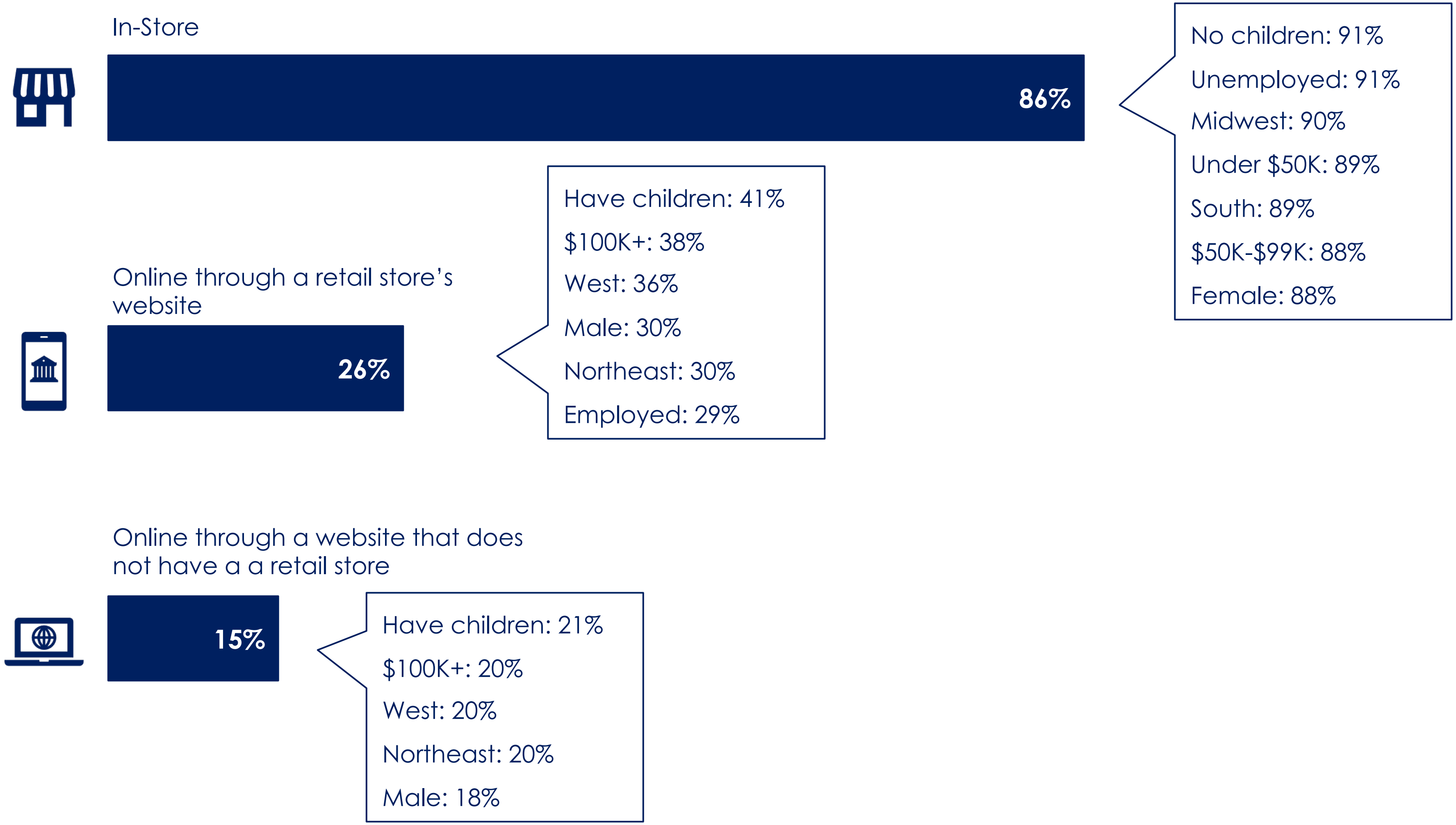
Employed: 37%

Q. Which of the following categories have you bought from/acquired in the last 3 months? (Select all that apply)

Base: All qualified respondents (N=3,000)

Wine: Point of Purchase

Most wine consumers purchase their wine in-store. One-fourth purchase their wine online through the retailer's website.

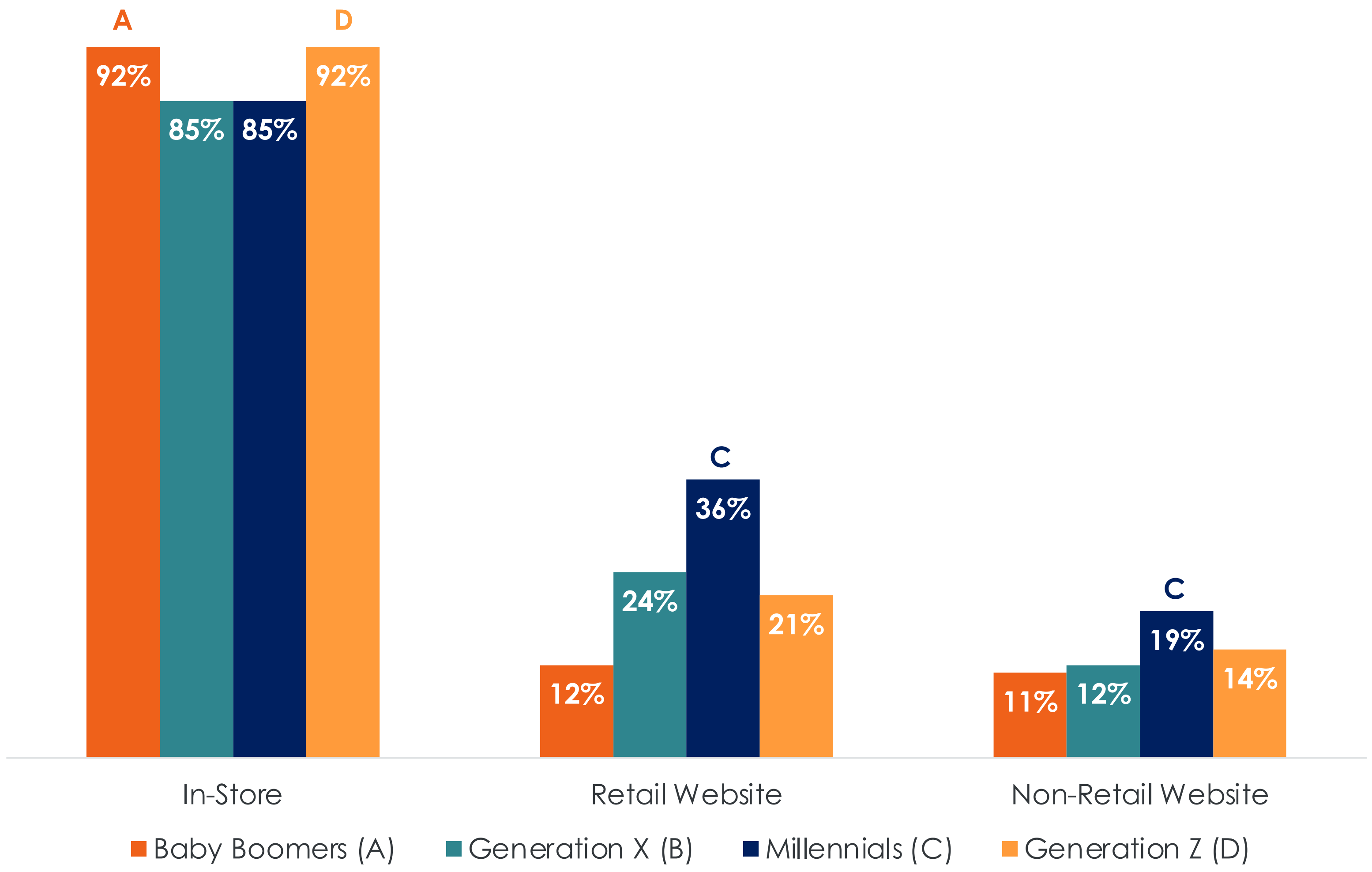


Q. In the last 3 months, how have you purchased wine? (Select all that apply)

Base: Purchased wine in the last three months (n=1,024)

Wine: Generational Points of Purchase

While Baby Boomers and Generation Z tied for in-store shopping, Millennials dominated all website sales.



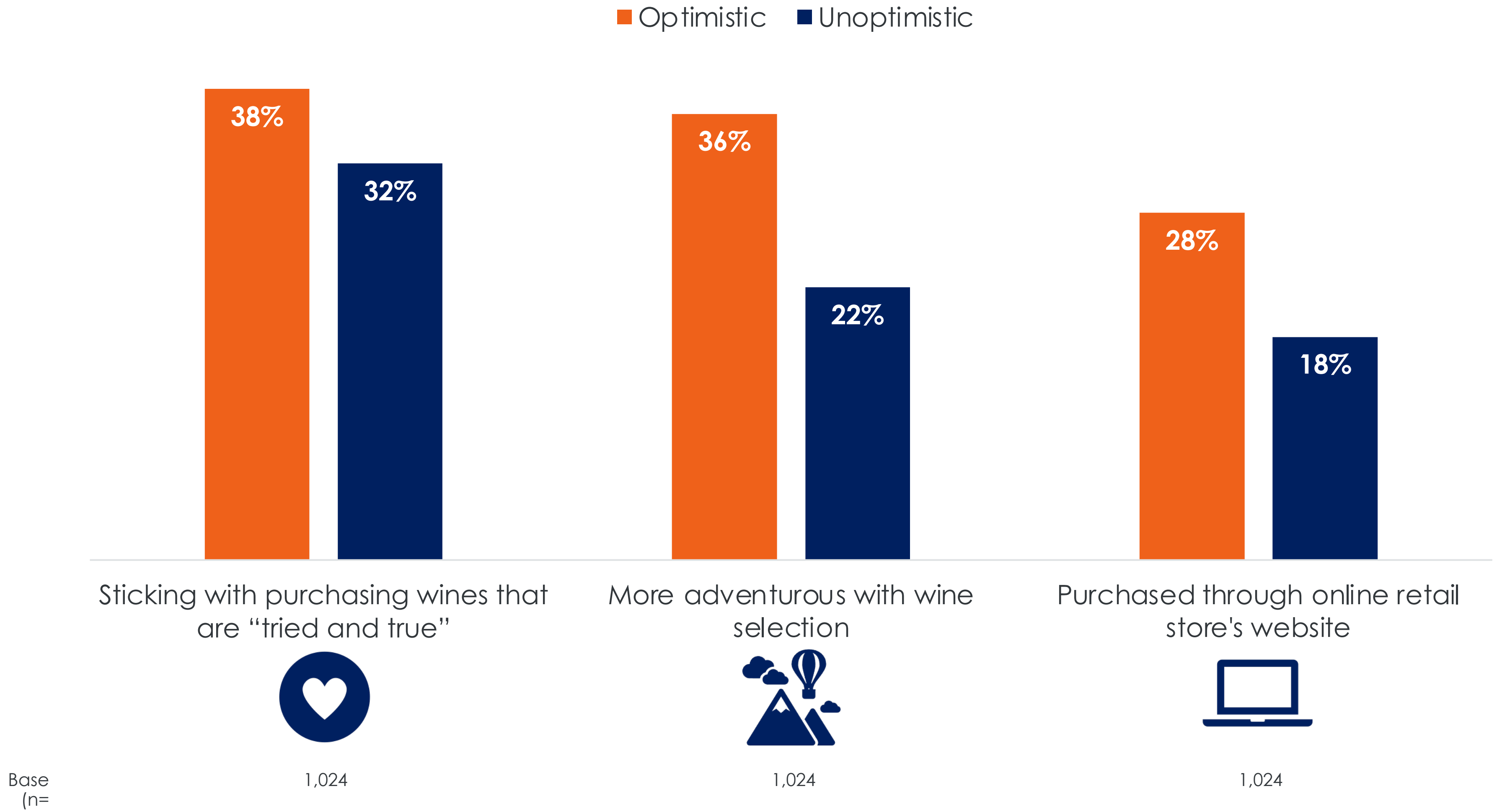
Q. In the last 3 months, how have you purchased wine? (Select all that apply)

Base: Purchased wine in the last three months (n=1,024)

Wine Selection & Optimism

Now Vs. Pre-COVID-19

Shoppers who are more adventurous with their wine purchases are also more likely to be optimistic. Optimistic people also purchased more often through an online retail store's website.



Top 2/7 – Strongly agree/agree

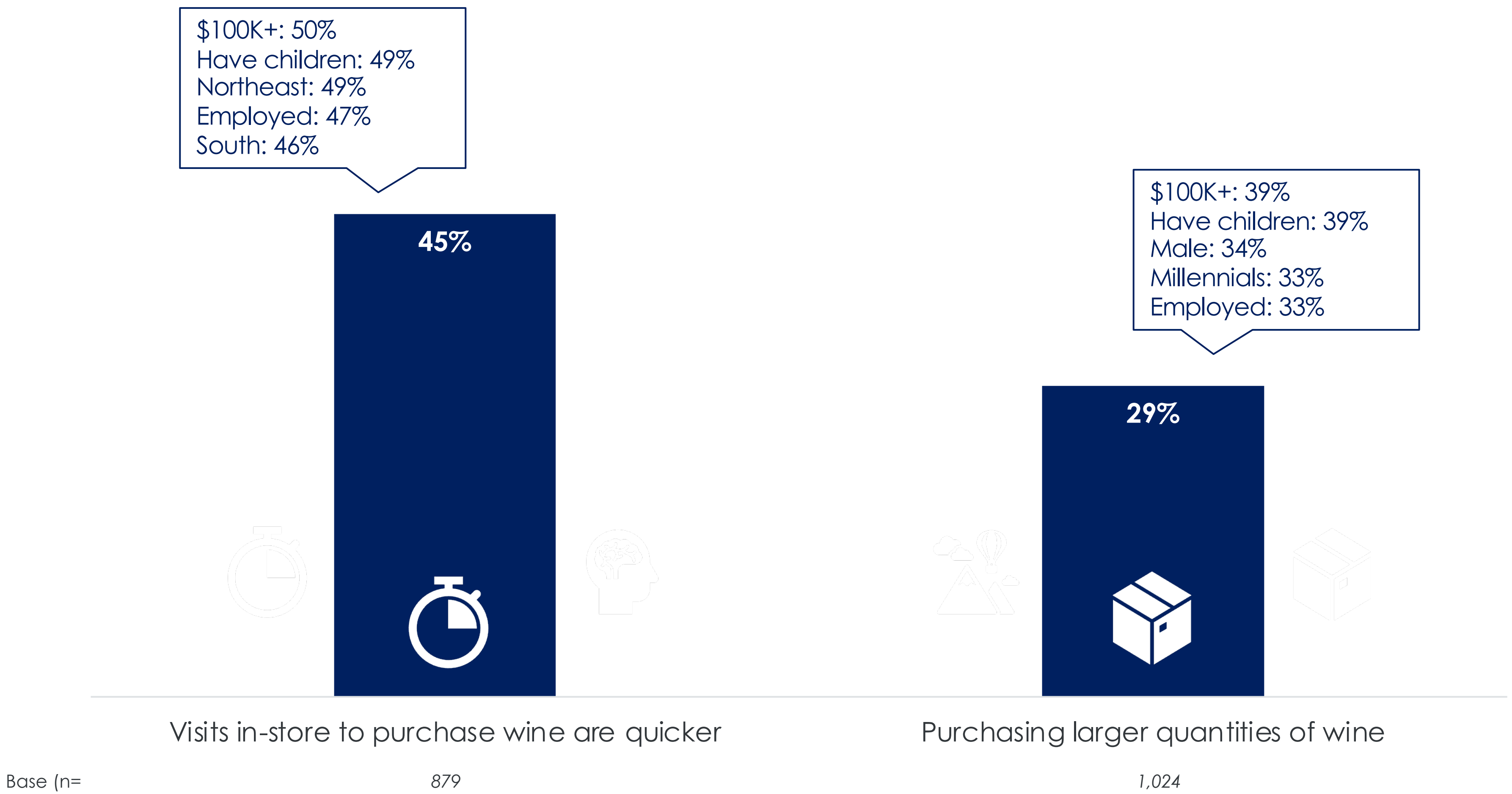
Base: Purchased wine in the last three months

Q. Compared to before the pandemic, how much do you agree or disagree with the following statements? (Select one for each statement)

Wine Purchase Habits

Now Vs. Pre-COVID-19

For many wine shoppers, visits to the wine store have gotten shorter while amount of wine purchased per visit has grown.



Top 2/7 – Strongly agree/agree

Base: Purchased wine in the last three months

Q. Compared to before the pandemic, how much do you agree or disagree with the following statements? (Select one for each statement)

Beer Drinker Profile
vs. Non-buyers

39% of the Population
130 million Americans

Personality Traits

76%
Vs. 73% of beer drinkers are optimistic about the future

(Top 2 of 4: Moderately/Very optimistic)

Although, they are still concerned about COVID-19 impacting:

The economy (80%) vs. 79%

In-person social events (70%) vs. 68%

(Top 2 of 4: Moderately/Extremely concerned)

Self described personality

26% Open-minded
vs. 22%

22% Good-hearted
vs. 24%

17% Adventurous
vs. 14%

Shopping Habits

Top 2 of 7: Strongly Agree/Agree

42%
Enjoy spending time picking out items to purchase
(39% Non-buyers)

29%
Would pay more for items that are sustainably sourced
(25% Non-buyers)

20%
Spend money to stay on stop of the latest trends
(16% Non-buyers)

14%
Only looking for the cheapest brand possible
(16% Non-buyers)

Quality is most important for beer drinkers when buying products.

Wine Drinker Profile
vs. Non-buyers

34% of the Population
112 million Americans

Personality Traits

79%
vs. 70% of wine drinkers are optimistic about the future

(Top 2 of 4: Moderately/Very optimistic)

Although, they are still concerned about COVID-19 impacting:

The economy (82%) vs. 77%

In-person social events (73%) vs. 66%

(Top 2 of 4: Moderately/Extremely concerned)

Self described personality

25% Open-minded
vs. 21%

17% Adventurous
vs. 14%

11% Efficient
vs. 8%

Shopping Habits

Top 2 of 7: Strongly Agree/Agree

46%
Enjoy spending time picking out items to purchase
(36% Non-buyers)

32%
Prefer to shop online than in physical stores
(28% Non-buyers)

21%
Spend money to stay on stop of the latest trends
(14% Non-buyers)

31%
Would pay more for items that are sustainably sourced
(22% Non-buyers)

Quality is most important for wine drinkers when buying products.

Liquor Drinker Profile
vs. Non-buyers

35% of the Population
116 million Americans

Personality Traits

75%
vs. 72% of liquor drinkers are optimistic about the future

(Top 2 of 4: Moderately/Very optimistic)

Although, they are still concerned about COVID-19 impacting:

The economy (82%) vs. 77%

In-person social events (71%) vs. 67%

(Top 2 of 4: Moderately/Extremely concerned)

Self described personality

24% Open-minded
vs. 22%

18% Adventurous
vs. 13%

23% Good-hearted
vs. 23%

Shopping Habits

Top 2 of 7: Strongly Agree/Agree

43%
Enjoy spending time picking out items to purchase
(39% Non-buyers)

28%
Prefer to shop online than in physical stores
(30% Non-buyers)

12%
Only looking for the cheapest brand possible
(16% Non-buyers)

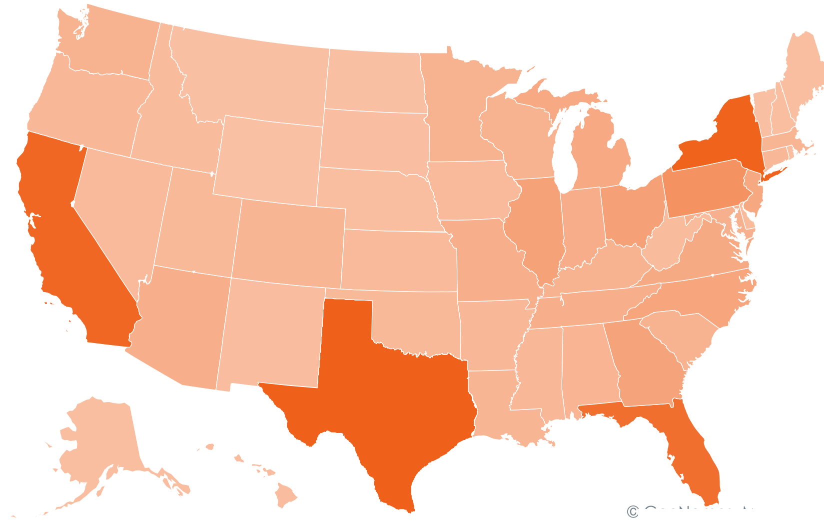
27%
Would pay more for items that are sustainably sourced
(24% Non-buyers)

Quality is most important for wine drinkers when buying products.

Demographics

50%
Female

49%
Male



Generations

10% Gen Z | 36% Millennials | 32% Gen X | 22% Baby Boomers

Employment Status

Employed full-time	53%	Unemployed	7%
Retired	12%	Business owner/Self-employed	5%
Employed part-time	10%	Full-time student	3%
Homemaker	9%	Freelancer	2%

40%
have children in the household

About Provoke Insights

Founded on the premise that research should better align with marketers' needs, Provoke Insights empowers brands to navigate through today's cluttered advertising space. This full-service market research firm solely focuses on research for **branding**, **advertising**, and **content marketing** initiatives.

What makes Provoke Insights unique from other research firms is that you work with a research expert who is also a seasoned brand strategist; this ensures that questions are deeply explored, and insights are cultivated and capitalized. We develop insights from the data to help guide growth for your company's vision.
For more information or press inquiries, reach out to rachael.ryan@provokeinsights.com.