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CURION INTELLIGENCE REPORTS

2025

ATTITUDES & USAGE, BRAND-BLIND PRODUCT EVALUATION, & IMPLICIT ASSOCIATION

FLAVORED WHISKEY









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OVERVIEW

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Background

The flavored spirits category is growing, driven by evolving consumer tastes and a growing demand for unique drinking experiences.[1] From spiced whiskeys to tropical rums, these innovations are reshaping how people enjoy their drinks — both at home and in social settings. Researching this trend is essential to uncover what flavors resonate, how consumers incorporate them into their routines, and how brands can stay competitive. By understanding usage patterns and preferences, alcoholic beverage companies can craft targeted strategies that capitalize on this expanding market, ensuring they remain relevant in a fast-evolving industry.

The Curion team has the expertise to take the guesswork out of strategizing and identify the key factors that influence consumers' decision to fuel their fun with flavored spirits and refine offerings to align with their preferences.

This study focuses on **Apple Flavored Whiskey**, one of the leading varieties in the flavored whiskey category.[2]

Objectives

01 Identify top flavors that drive interest among flavored whiskey users.

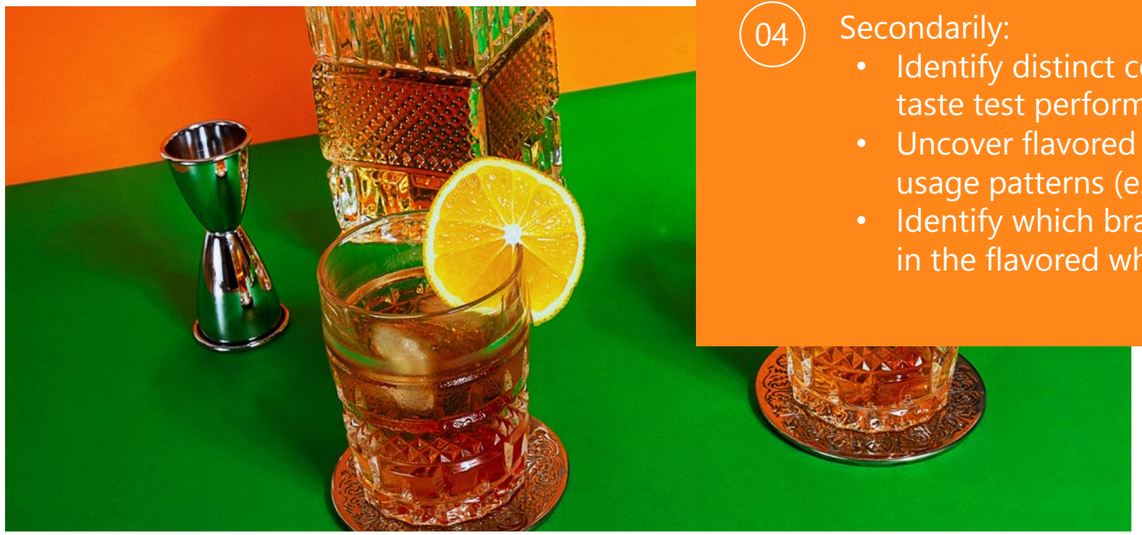
02 Reveal conceptual key product and emotional attributes of flavored whiskey that matter most when deciding to purchase and compare to consumers' perceptions of blind tasted liquids, both implicit and explicit.

03 Determine which brand/s of tested apple flavored whiskey have the highest Curion Score™ and which product and emotional attributes contribute most.

04 Secondarily:

- Identify distinct consumer segments based on blind taste test performance as measured by Curion Score™
- Uncover flavored whiskey consumer use cases and usage patterns (e.g., occasions, drinks made, etc.).
- Identify which brands and flavors are currently winning in the flavored whiskey/spirits category.







1 Allied Analytics LLP. (2024, April 17). *Flavored alcohol market to expand at 4.6% CAGR reaching $1.8 trillion by 2032.* EIN Presswire.
2 NielsenIQ. (2022, August 10). *Flavored options are a winner in whiskey sales.*

Methodology

PHASE 01

QUANTITATIVE ONLINE SURVEY

12-minute Market Insights Quantitative Online Survey among n=300 flavored whiskey drinkers

Including:
- Flavored spirit and flavored whiskey brand and flavor familiarity, consumption, frequency of consumption
    - Rank flavors consumed to determine most popular/preferred flavors
- A MaxDiff exercise to determine importance of flavored whiskey product attributes
- Understand emotional drivers for consuming flavored whiskey
- How they prepare drinks using flavored whiskey (e.g., specific occasions, types of drinks made, recipes, etc.).
- Reasons for trying and drinking flavored whiskey
- Discovery and purchasing habits

RESPONDENT SPECIFICATIONS
- U.S. consumers, aged 21-65; 50% aged 22 to 38
- Ethnicity as falls
- Flavored whiskey consumers: Purchased and consumed whiskey in the past month, drinks flavored whiskey at least 1X per month on average
- Open to trying apple flavored whiskey

KEY OUTCOMES

- MaxDiff to determine the most important attributes for flavored whiskey when making a purchase decision
- Most popular flavors and brands of flavored whiskey/spirits (i.e., other flavored spirits that flavored whiskey drinkers consume)
- Use cases and usage occasions for flavored whiskey/spirits
- Discovery and purchasing habits

PHASE 02

PRODUCT EVALUATION + IMPLICIT

In-person consumer evaluation of flavored spirits with post-taste implicit

Including:
- Six spirits evaluated in one 60-minute visit
    - 150 consumers each unbranded liquid in a randomized sequential monadic design.
    - Liquids were served neat.
    - 0.5 oz serve size (15 ml) per liquid in clear plastic cups.
- Add-on of Implicit Survey post-taste after each liquid.
    - Responses were compared to Online Survey associations
- Curion Score™ was used to show preference across the liquids with CATA descriptors and implicit associations displayed on PCA map (correlations with Curion Score vs Overall Liking).
- Segmentation for consumers in study

RESPONDENT SPECIFICATIONS
- U.S. consumers, aged 21-65; 50% aged 22 to 38
- Ethnicity as falls
- Past 3-month consumers of Whiskey and Whiskey Acceptors
- Open to Apple Flavored Whiskey

KEY OUTCOMES

- Curion Score™ to evaluate apple-flavored whiskey product performance across liquids (6 products)
- Implicit Association Test to uncover unconscious emotions associated with tested liquids and determine how closely implicit results align with self-reported flavored whiskey purchase drivers from Phase 1.

EXECUTIVE SUMMARY

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Executive Summary

Consumers try flavored whiskey for its **novelty**, **appeal**, and **recommendations**.

They drink it primarily for the **taste**, **variety**, and to **explore new flavors**.

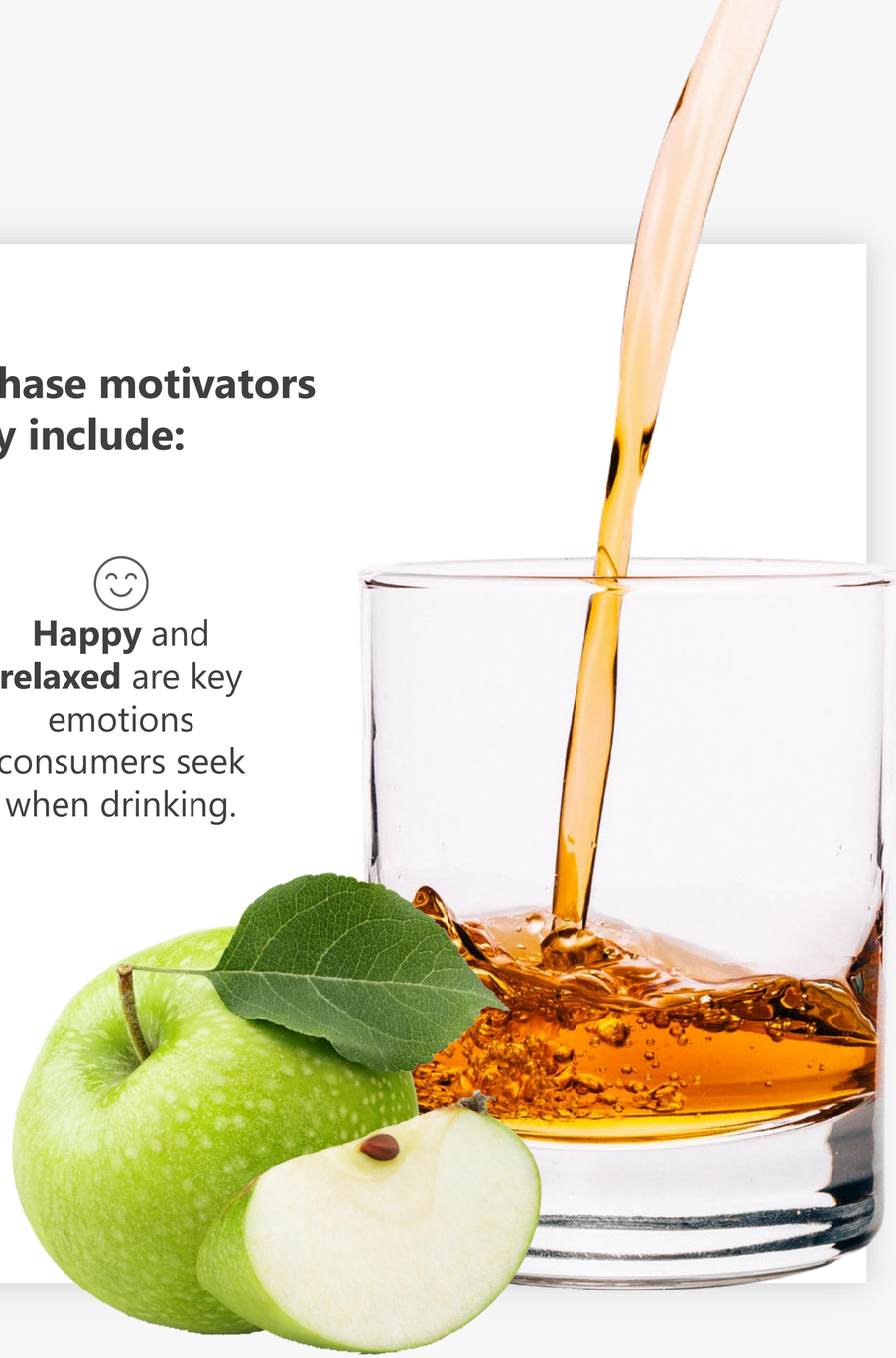
The top purchase driver is a unique or interesting flavor.

Top 5 product related purchase motivators for Apple Flavored Whiskey include:

based on an online MaxDiff method.

1. Smooth
2. High quality
3. Satisfying
4. Balanced
5. Easy to drink

Happy and **relaxed** are key emotions consumers seek when drinking.

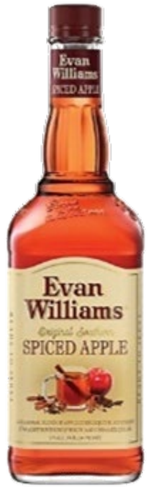


Barriers to Consumption:
A quantitative online survey indicates that factors such as not being top of mind, preference for other spirits, and price affect the frequency of flavored whiskey consumption.

Executive Summary

In-Market Products are well-liked

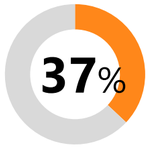
(based on in-facility consumer testing): Although the top brands of interest to consumers are Jack Daniel's, Crown Royal, and Jim Beam, when tasted blind, **consumers like most apple flavored whiskeys in the market**.



Unbranded, Evan Williams has the highest Curion Score™ and is perceived by more consumers as having three of the top five purchase motivators and as evoking a highly sought, relaxed feeling. In contrast, Jim Beam falls short on these characteristics due to its strong flavor (described as artificial, medicinal, and evoking nauseated feelings), making it the least-liked product in the array.

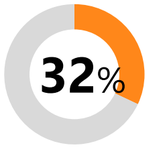
Post-taste, **3 consumer segments** are identified based on blind evaluations in relation to Curion Score™, which results in more discrimination from consumers than using overall liking.

SEGMENT 1



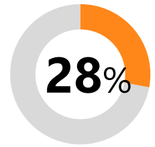
Evan Williams Likers
Prefer Apple Flavored Whiskey that is easy to drink, sweet and evokes happy, relaxed, and calm emotions.

SEGMENT 2



Proper Twelve Likers
Prefer Apple Flavored Whiskey that is balanced in flavor, smooth, high quality, and evokes indulgent, social, and wealthy emotions.

SEGMENT 3



Diverse Brand Likers
Prefer Apple Flavored Whiskey that is authentic, warm, strongly flavored, and evokes feelings of confidence, importance, indulgence, and wealth. While Crown Royal has the highest Overall Liking and Preference among these consumers, Ellington Reserve and Jack Daniel's are also closely aligned. This is the only segment that does not associate 'sweet' with their favorite product.





Next Steps for the Future of Flavored Whiskey

The main barrier to more frequent flavored whiskey consumption is that it's not top of mind for consumers. To address this, brands should focus on increasing awareness of flavored whiskey through **targeted in-store campaigns**. This can include tastings at liquor stores, attractive point-of-sale displays, and limited-time coupons or discounts to encourage trial and purchase.

When developing apple flavored whiskey, it is important to ensure the liquids are **smooth, high quality, satisfying, balanced, easy to drink** and **elicit emotions of happiness and relaxation**.

Measuring not only the percentage of consumers who associate these descriptors with your product but also how quickly consumers associate these descriptions can confirm your product is positioned correctly.

Ensure the liquid is **balanced in sweetness** and is **absent of harsh and artificial descriptors**.

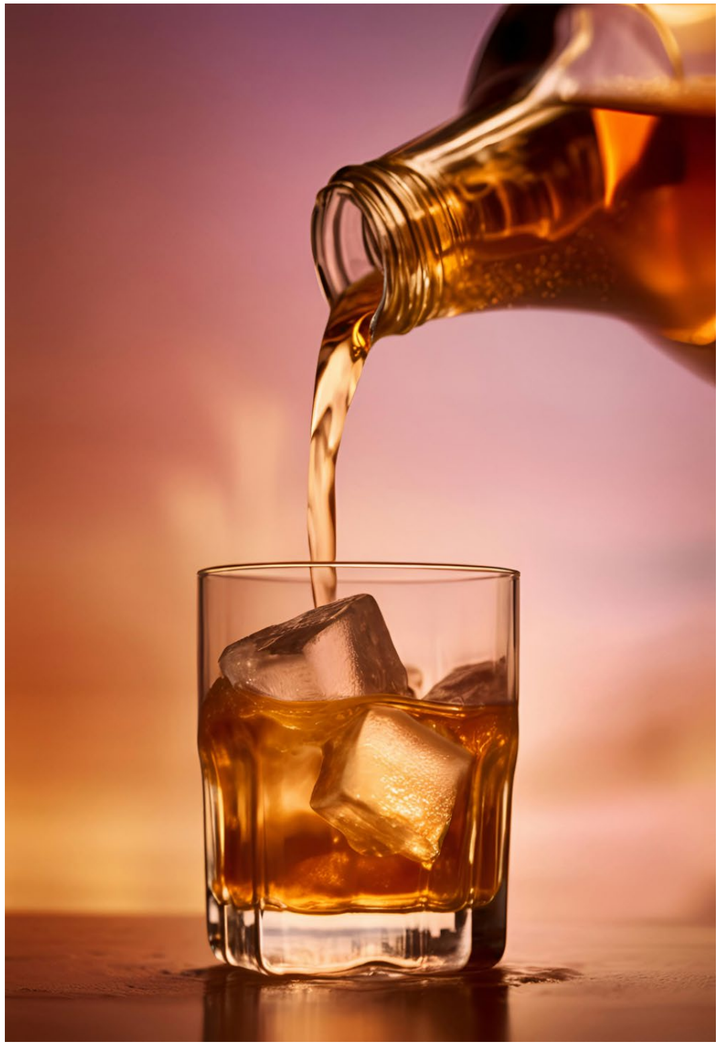
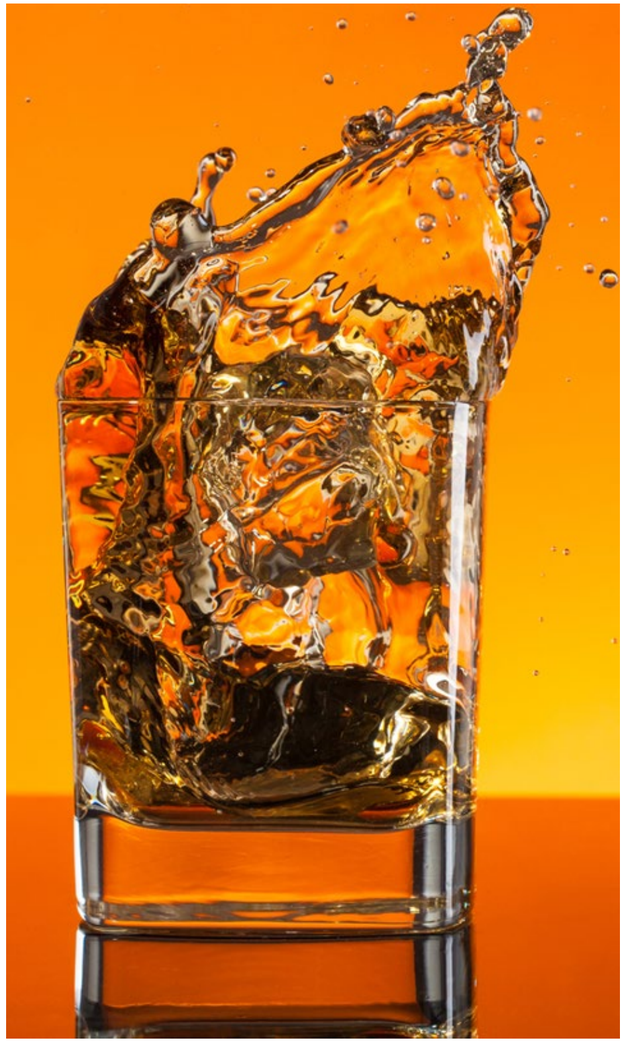
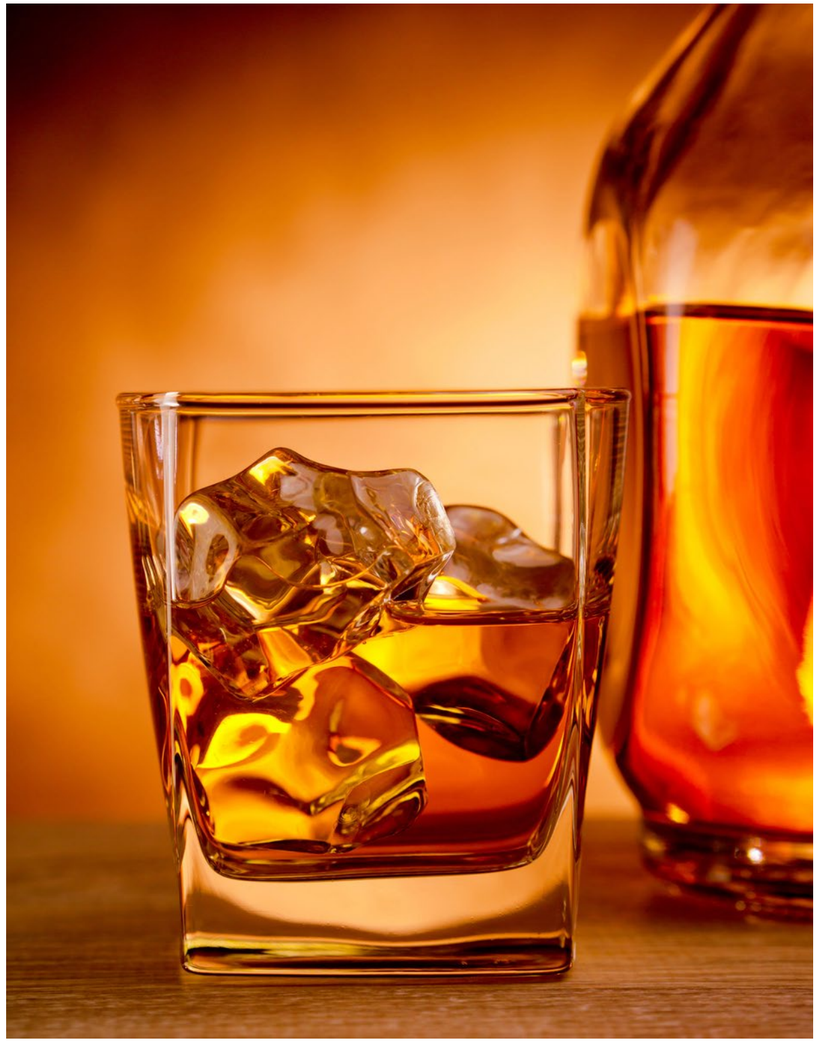
Sweetness plays a crucial role, and while some consumers find it "too sweet," this isn't inherently negative. The key lies in finding the right balance in sweetness with the other flavors.

While less important, **create a desired color** that is not "too light."

In the future, consider using **Curion Score™** to segment consumers rather than Overall Liking, as it better differentiates the products and reduces the number of consumers who "like" or "dislike" all products equally.

QUANTITATIVE ONLINE SURVEY

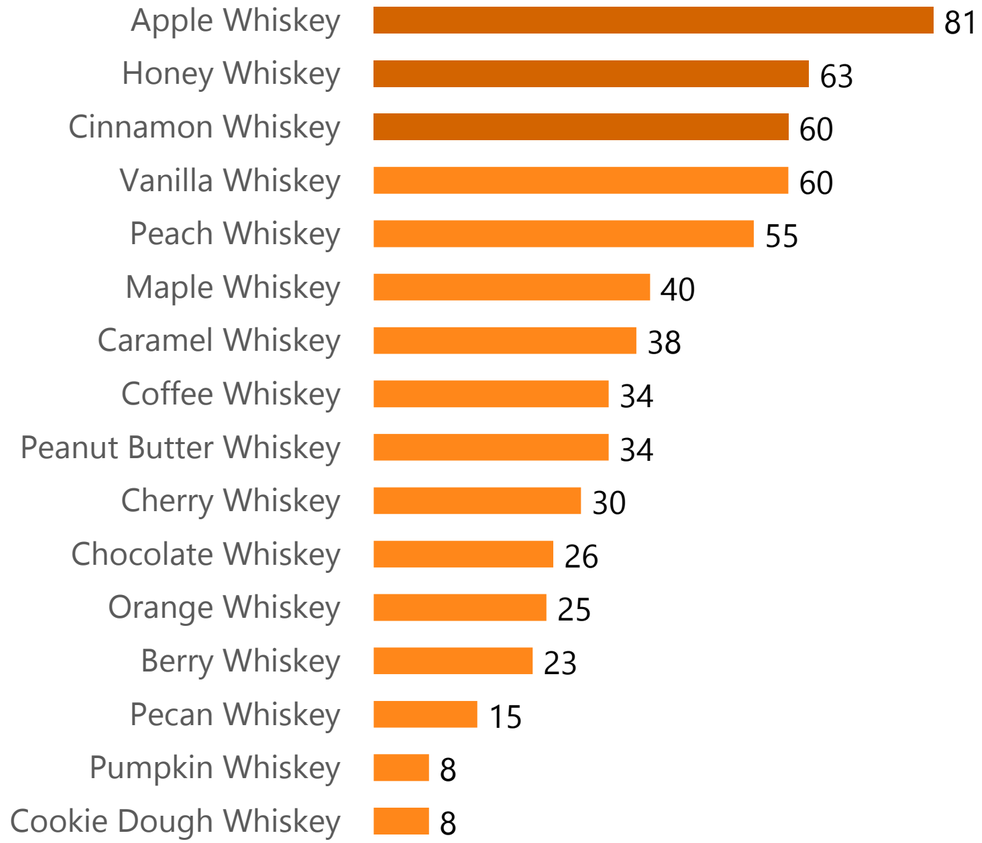
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Efficacy & Expectations

Consumers who drink or are open to apple flavored whiskey also tend to prefer honey and cinnamon flavors.

Types of Flavored Whiskey Consumed (%)



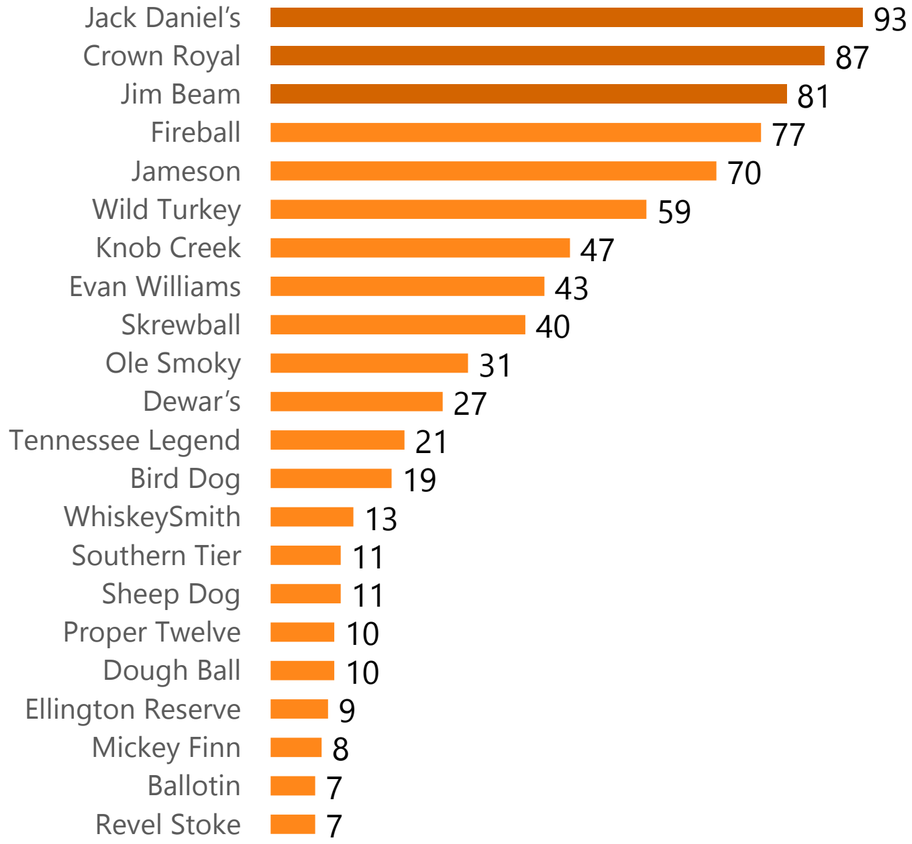
Preferred Types of Flavored Whiskey (%) – Ranked 1-3



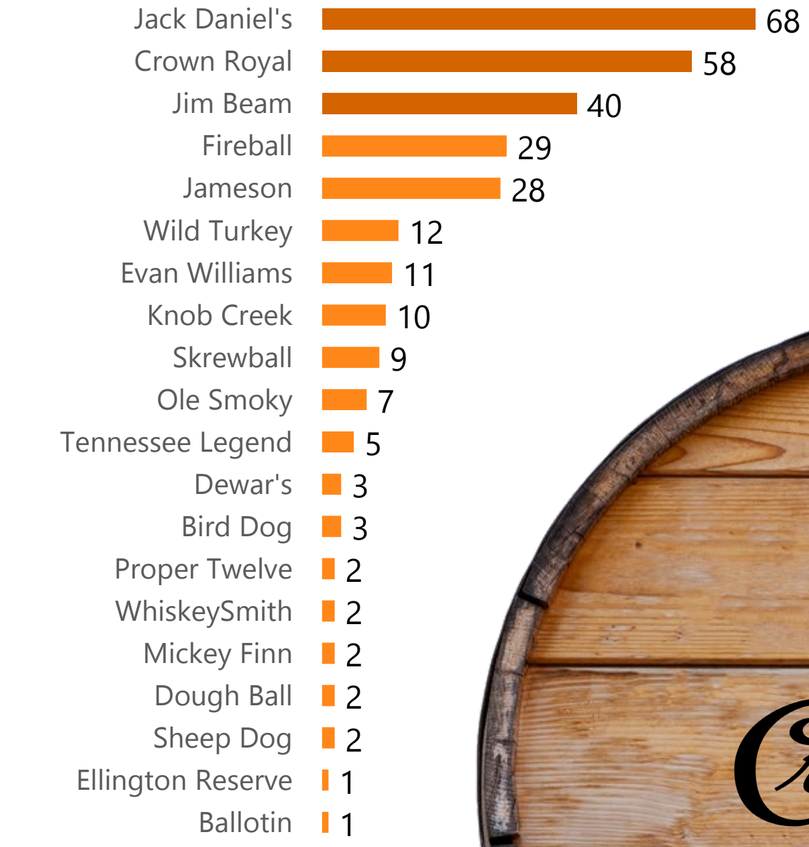
Q200. What types of flavored whiskey have you ever consumed?
Q205. Rank the top three types of flavored whiskey you prefer.
BASE: Total Sample (n=300)

Jack Daniel's, Crown Royal, and Jim Beam are the most consumed and preferred flavored whiskey brands among consumers open to drinking apple flavored whiskey.

Brands of Flavored Whiskey Consumed (%)



Preferred Brands of Flavored Whiskey (%) – Ranked 1-3

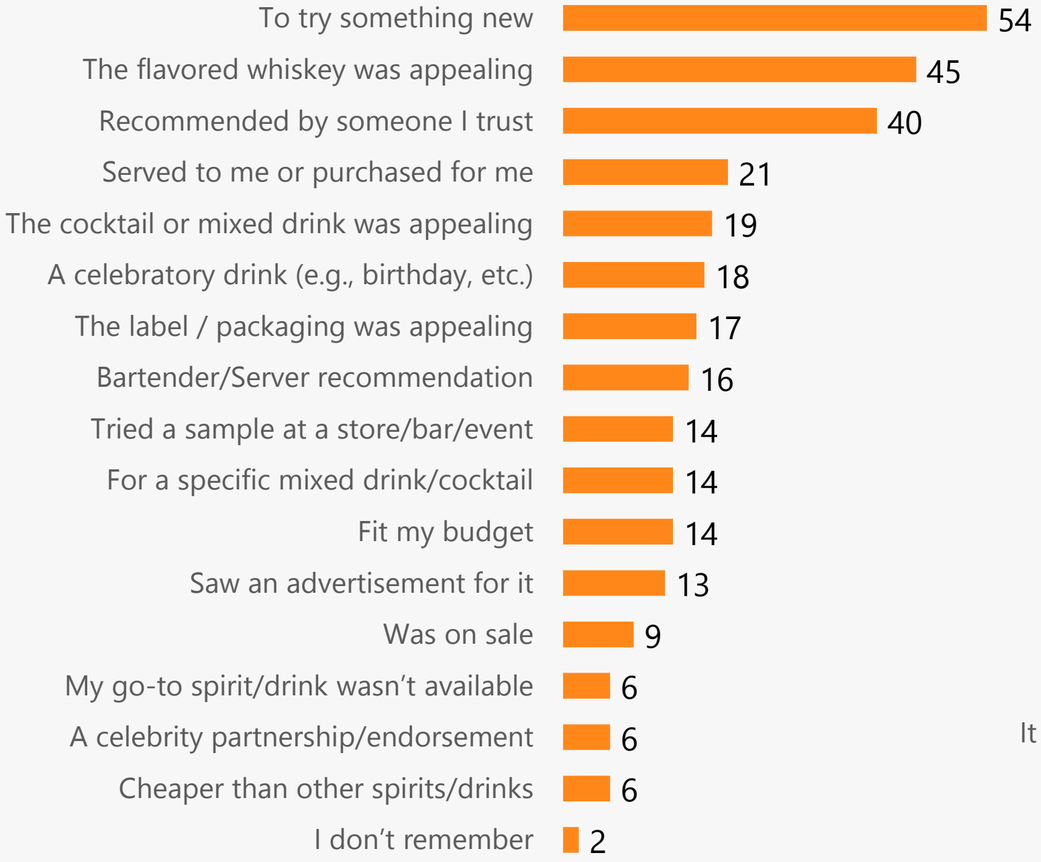




Q210. What brands of flavored whiskey have you ever consumed?
Q215: Rank the top three brands of flavored whiskey you prefer.
BASE: Total Sample (n=304)

Consumers try flavored whiskey due to novelty, appeal, and recommendations. Top reasons for drinking include enjoying the taste and flavor options and a desire to try new/different flavors.

Reasons First Tried Flavored Whiskey (%)





Reasons For Drinking Flavored Whiskey (%)

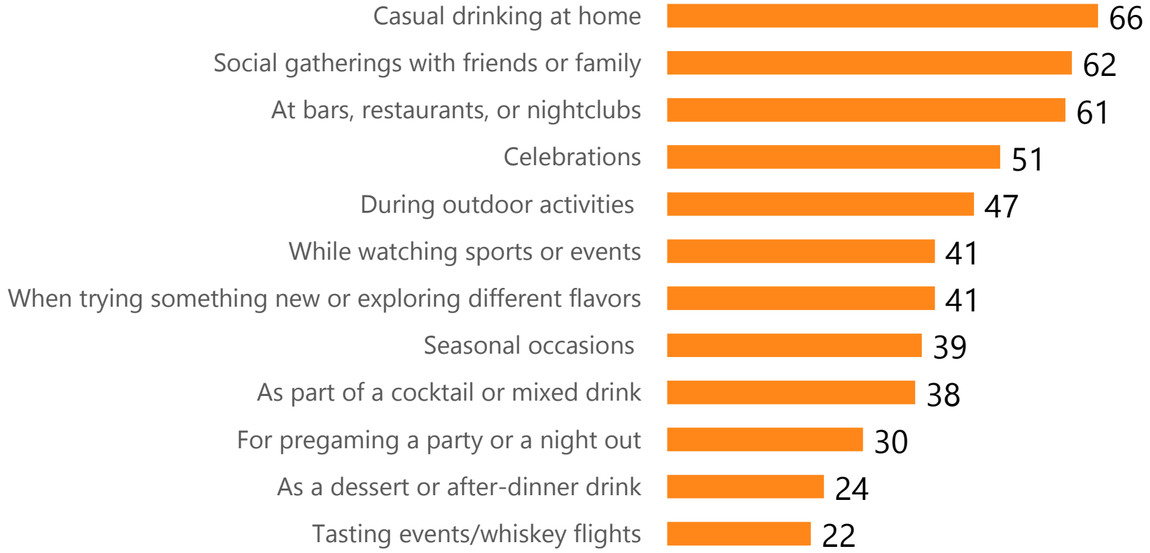


Q300: Thinking about the first time you tried flavored whiskey, why did you try it?
Q310: What are the main reasons you choose to drink flavored whiskey?
BASE: Total Sample (n=300)

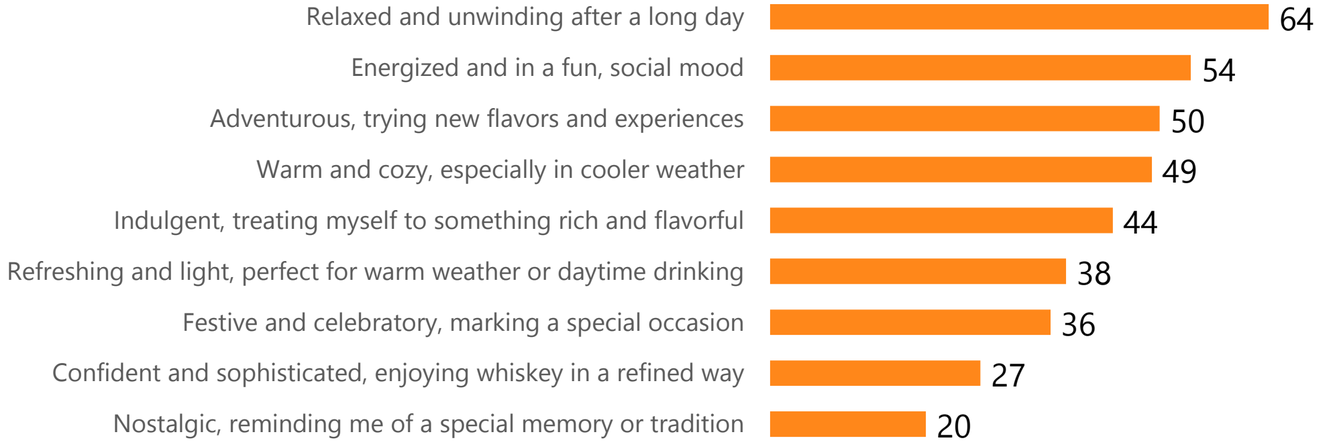
More than half of consumers drink flavored whiskey casually at home, at social gatherings, at bars/restaurants, or at celebrations. They drink it because they want to feel relaxed, energized, adventurous, or warm and cozy.



Occasions For Drinking Flavored Whiskey (%)



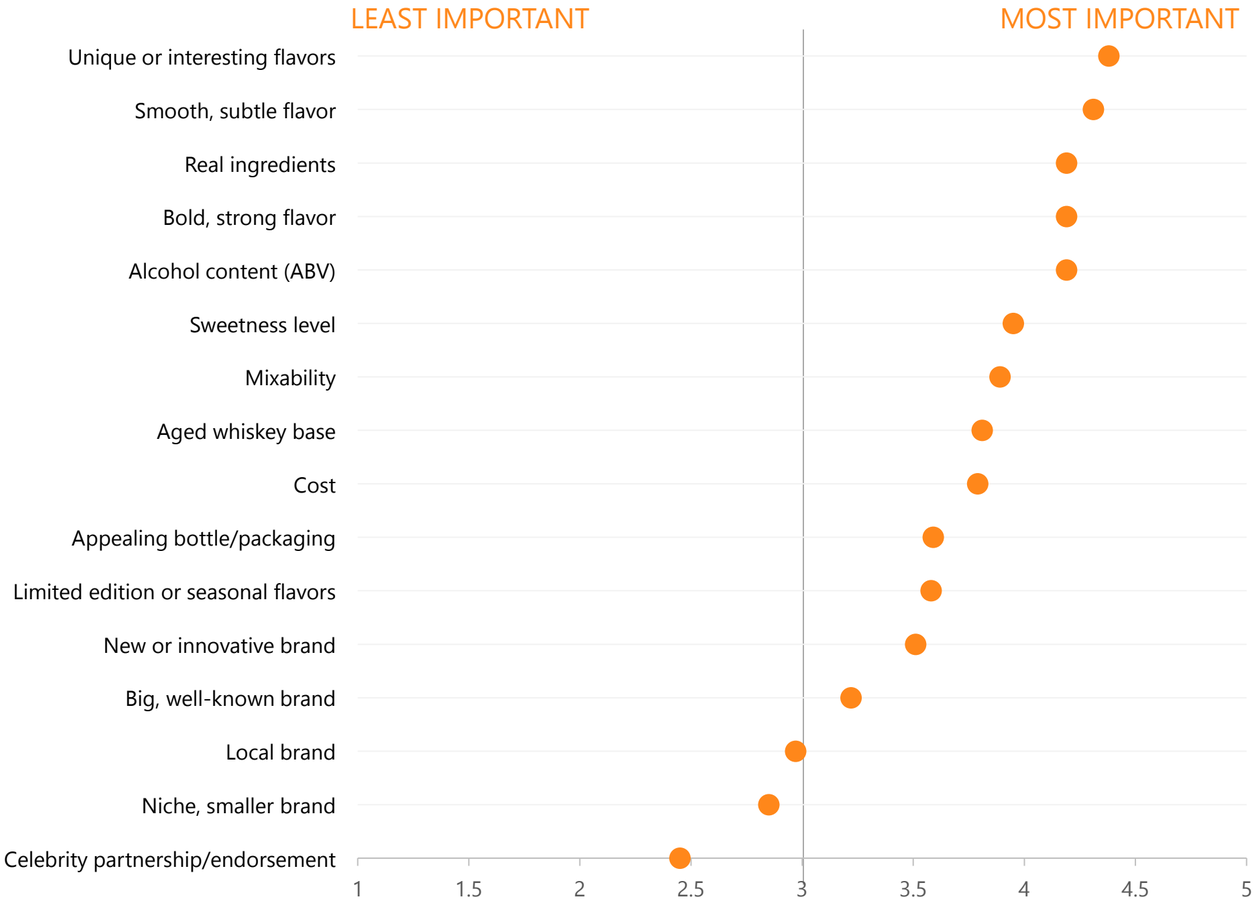
Feelings Associated with Drinking Flavored Whiskey (%)



Q305: On what occasions do you typically drink flavored whiskey?
Q315: When you drink flavored whiskey, how are you typically looking to feel?
BASE: Total Sample (n=300)

Consumers prioritize distinct flavors—whether smooth and subtle or bold and strong—real ingredients, and alcohol content when choosing flavored whiskey.

Flavored Whiskey Attribute Importance – (Mean)





INSIGHT
Brand attributes (e.g. new/innovative brand, local brand, etc.) are among the least important to consumers when purchasing flavored whiskey.

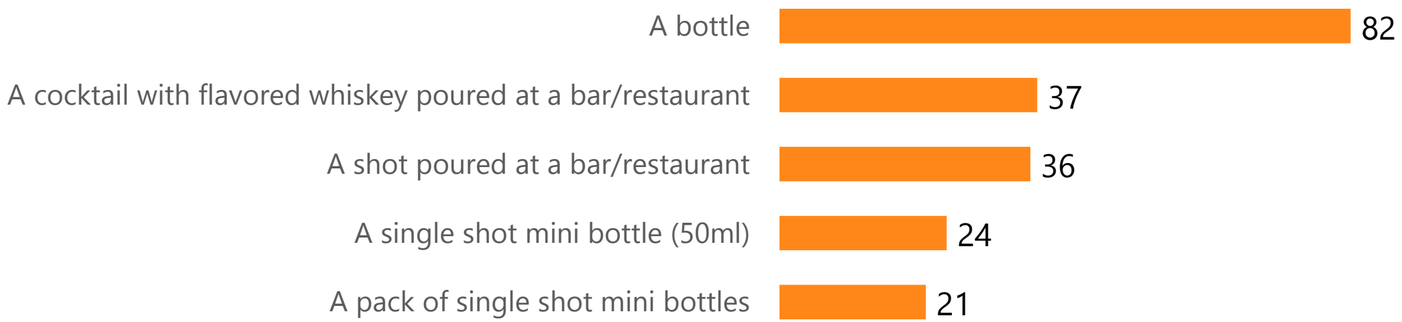
Q320: When purchasing a flavored whiskey, how important are each of the following factors?
BASE: Total Sample (n=300)

Consumers typically purchase a bottle of flavored whiskey and prefer to drink it on the rocks.

Preferred Method of Consumption (%)



Flavored Whiskey Format (%)





Q325: What is your preferred way of drinking flavored whiskey?
Q400: Which form of flavored whiskey do you typically purchase?
BASE: Total Sample (n=300)

Whiskey and soda mix is the most popular drink consumers make with flavored whiskey.

Whiskey and Soda Mixes (25%)

This is the largest category, as many people prefer simple two-ingredient whiskey mixers.

TYPES OF DRINKS:

- Crown Apple and Sprite
- Crown Royal Apple with Mountain Dew
- Apple and 7UP
- Jim Honey & Sprite
- Honey Whiskey and Soda
- Fireball and Sprite
- Whiskey and Dr. Pepper
- Whiskey and Coke/Diet Coke/Pepsi

Fruit and Citrus-Based Whiskey Drinks (15%)

Many enjoy mixing whiskey with apple, peach and citrus flavors for a refreshing taste.

TYPES OF DRINKS:

- Apple Whiskey Sour
- Apple Old Fashioned
- Apple Cider Old Fashioned
- Peach Whiskey Lemonade
- Apple Crown and Cranberry
- Crown Apple with Apple Pucker and Cranberry Juice
- Orange Whiskey Mule
- Cinnamon Maple Whiskey Sour

Straight and Strong Whiskey Servings (10%)

A sizable group enjoys whiskey in its purest form, either neat or on ice.

TYPES OF DRINKS:

- Whiskey Neat
- On the Rocks
- Peanut Butter Whiskey Neat
- Shots Straight from the Bottle

Classic Whiskey Cocktails (20%)

These traditional whiskey cocktails are quite popular and make up a solid portion of the responses.

TYPES OF DRINKS:

- Old Fashioned
- Manhattan
- Whiskey Sour
- Rob Roy
- Rusty Nail
- Mint Julep
- New York Sour
- Irish Coffee

Dessert-Inspired Whiskey Cocktails (10%)

Sweet, creamy drinks that mimic desserts, popular among those who like indulgent flavors.

TYPES OF DRINKS:

- Chocolate Whiskey with Cream Liquor
- Whiskey with Vanilla Ice Cream (blended)
- Whiskey Floats
- Whiskey with Baileys
- Cinnamon Toast Crunch (Fireball + RumChata)
- Flavored Whiskey with Banana Schnapps and Chocolate Liqueur

Spiced and Unique Whiskey Blends (8%)

These drinks introduce bold flavors, often using cinnamon, honey or peanut butter whiskey.

TYPES OF DRINKS:

- Cinnamon Whiskey on the Rocks
- Fireball and RumChata
- Skrewball Whiskey with Pineapple Juice
- Honey Whiskey Mule (Honey Whiskey, Ginger Beer, Lime)
- Cinnamon Whiskey Mule
- Cinnamon Whiskey with Beer

Q330: What types of drinks or cocktails do you order or make with flavored whiskey?
BASE: Consumers who prefer drinking flavored whiskey with a mixer or as a specialty cocktail (n-113)

Among those who have previously tried apple flavored whiskey, nearly 6 in 10 choose it over other flavors because they enjoy the taste of apple in drinks.

Reason Choose Apple Flavored Whiskey Over Other Flavors (%)

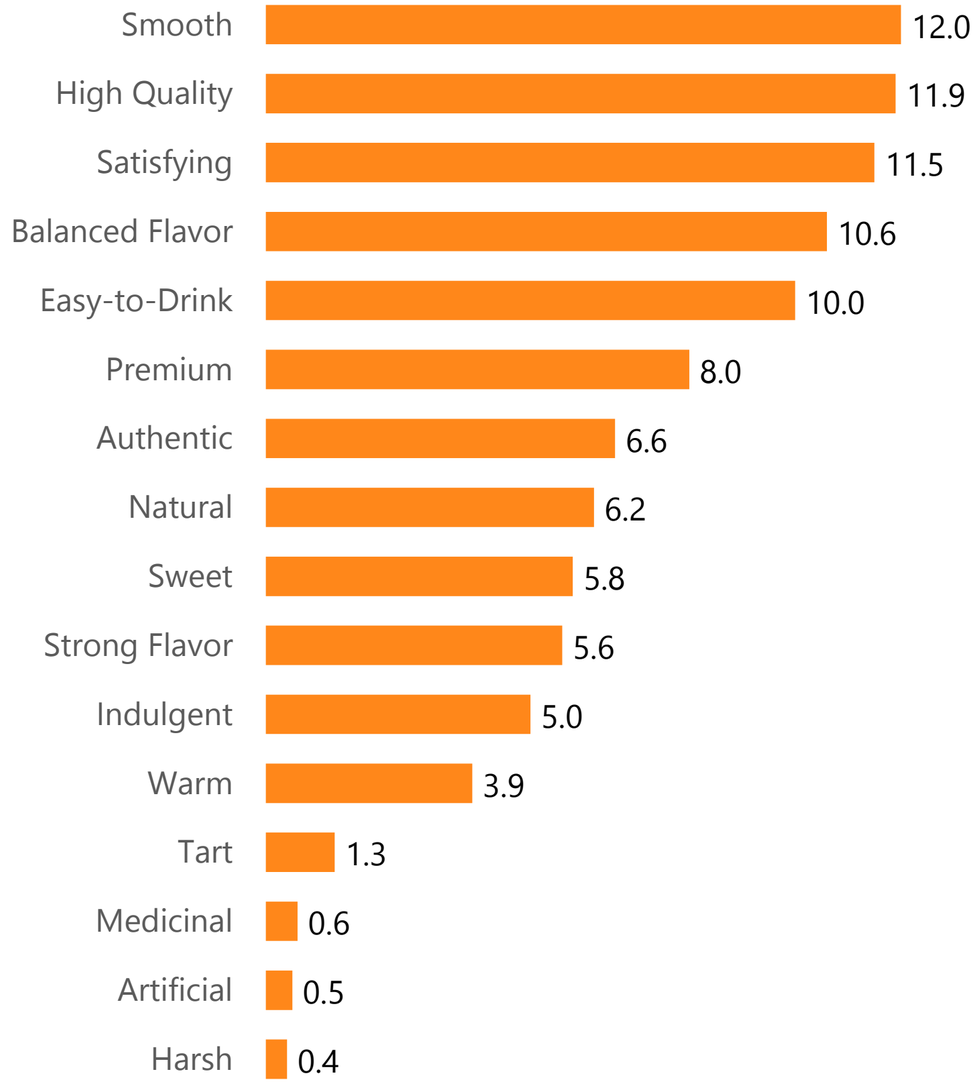


Q335: Earlier you said you've consumed apple flavored whiskey. Why did you choose apple flavored whiskey over a different flavor?.
BASE: Consumers who have tried apple-flavored whiskey (n=242)

Smooth, high quality, and satisfying are the most desired flavor attributes for apple flavored whiskey.

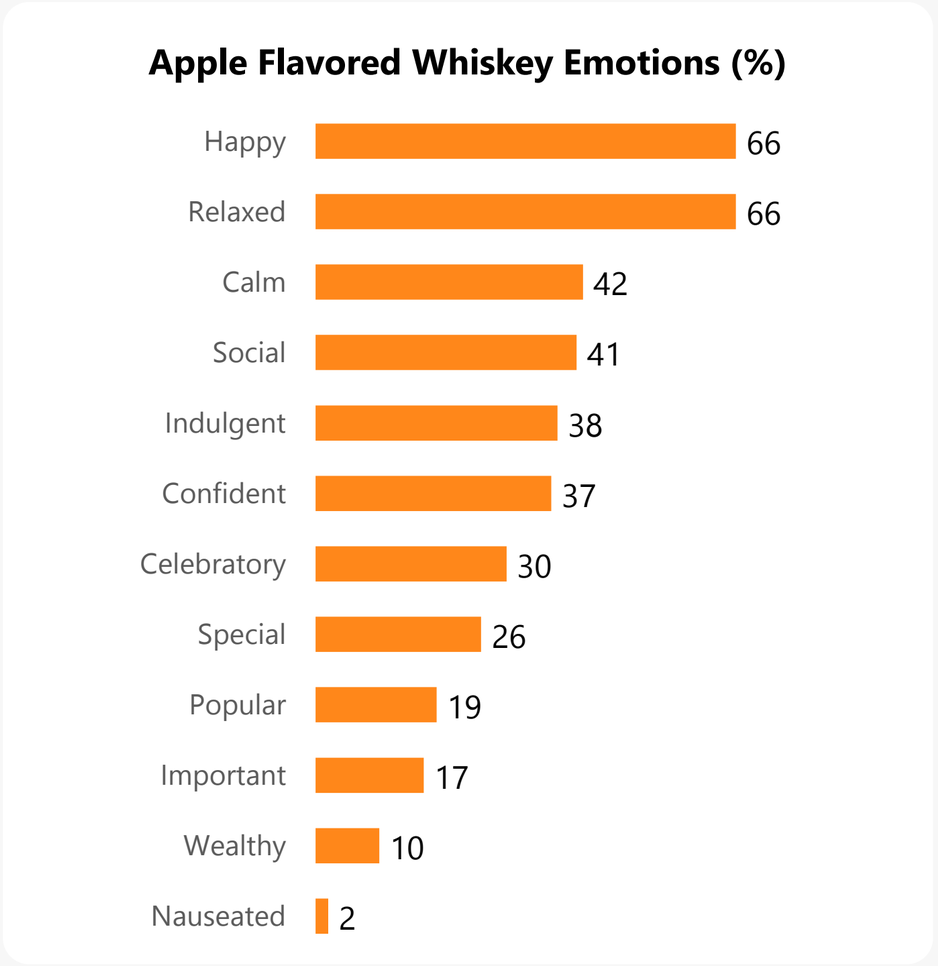


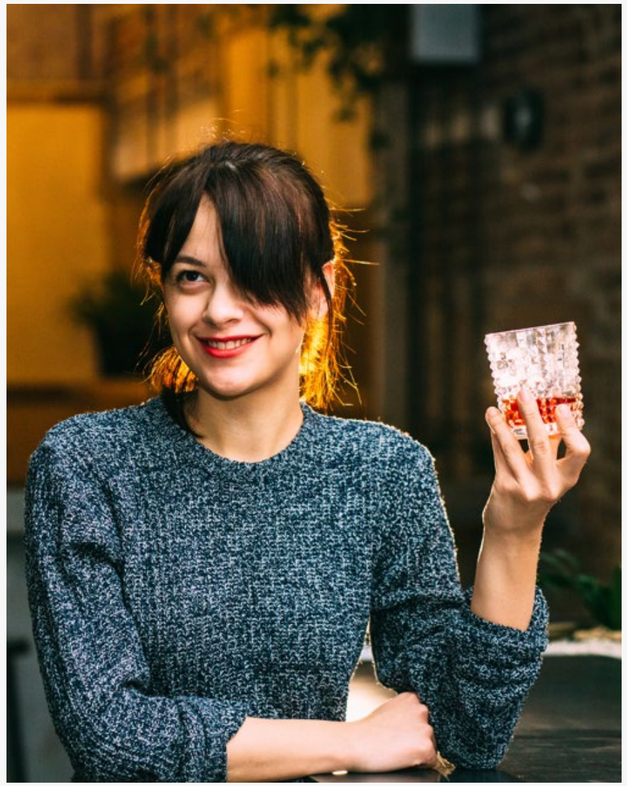
Most Desired Flavor Attributes For Apple Flavored Whiskey – MaxDiff Probability-Scaled Scores



MaxDiff: Which flavor attribute is, or would be, MOST desired and LEAST desired when you drink apple flavored whiskey?
BASE: Total Sample (n=300)

Two-thirds of consumers say apple flavored whiskey makes them feel happy and relaxed.



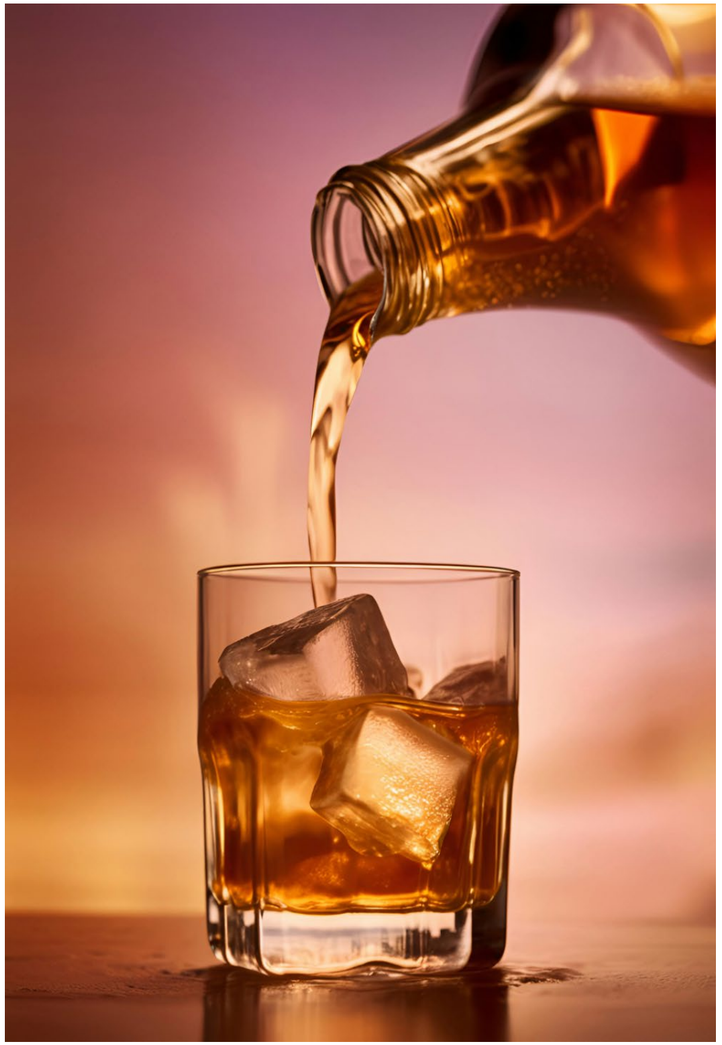


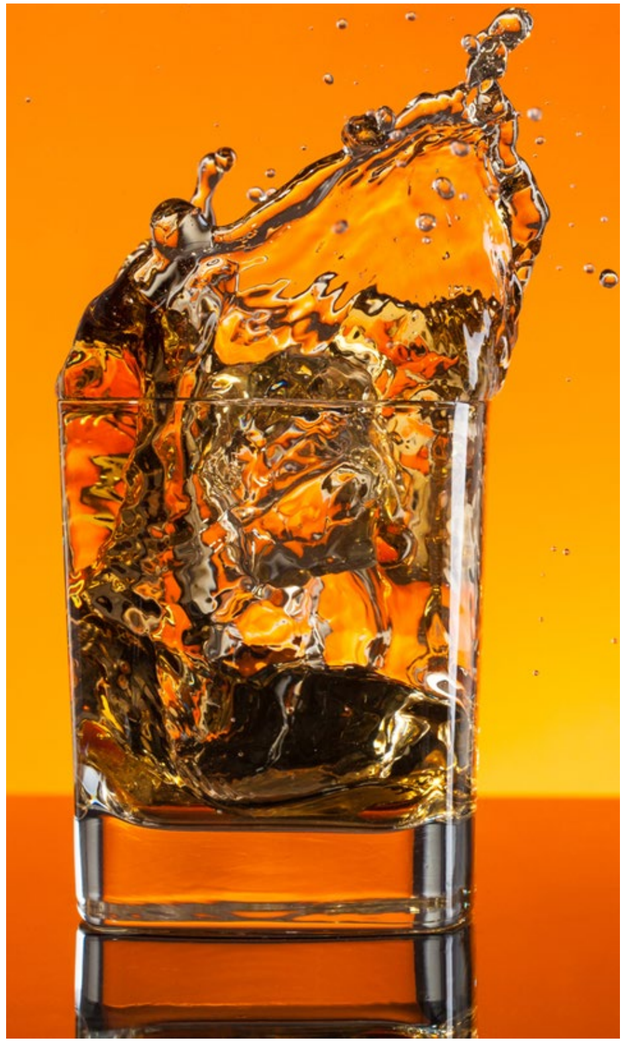


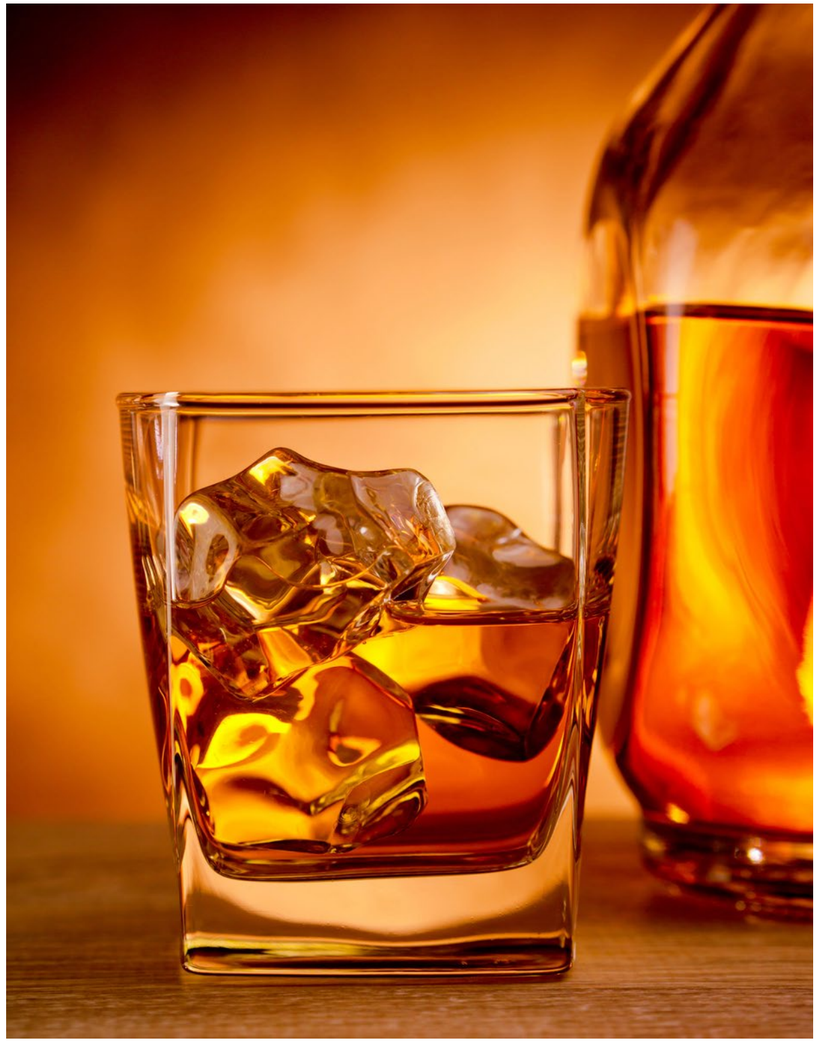
Q350: Now, think about the last time you drank apple flavored whiskey. Please read the descriptors below and select the ones you would use to describe the way apple flavored whiskey made you feel.
BASE: Consumers who have tried apple-flavored whiskey (n=242)

PRODUCT EVALUATION + EMOTIONAL IMPACT

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Key Results

Products Tested



Evan Williams
Spiced Cider Apple Flavored Whiskey



Proper Twelve
Irish Apple Whiskey



Crown Royal
Regal Apple Flavored Whiskey



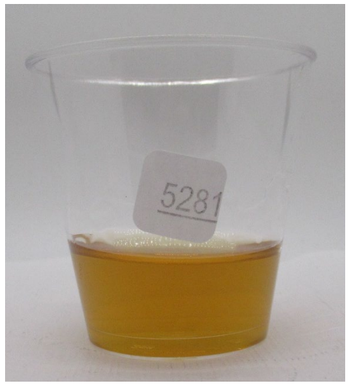
Ellington Reserve
Apple Flavored Whiskey



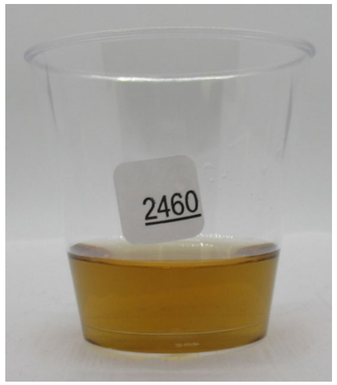
Jack Daniel's
Tennessee Apple Whiskey



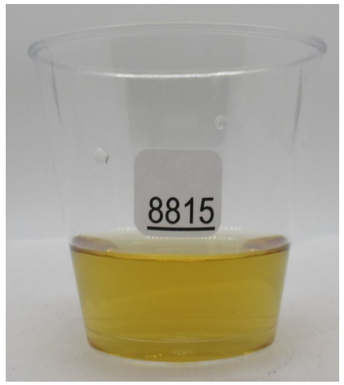
Jim Beam
Apple Bourbon Whiskey

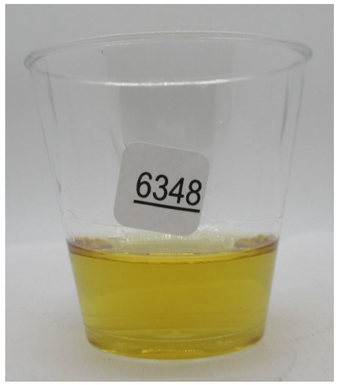












Post-Taste, consumers associate descriptors to the products using a timed association test (i.e., Implicit Testing).

After Smelling and Tasting each product, consumers are shown 12 attributes associated with possible descriptors of apple flavored whiskey, one at a time; Consumers read each descriptor and press the space bar if they associate it with the liquid.

DESCRIPTORS

- Medicinal
- Harsh
- Tart
- Artificial
- Premium
- Smooth
- Sweet
- High Quality
- Natural
- Indulgent
- Authentic
- Satisfying
- Warm
- Strong Flavor
- Easy-to-Drink
- Balanced Flavor



Consumers associate the top 3 of 5 purchase motivators (in bold) with Evan Williams.

Significantly fewer consumers associate top purchase motivators with Jim Beam.

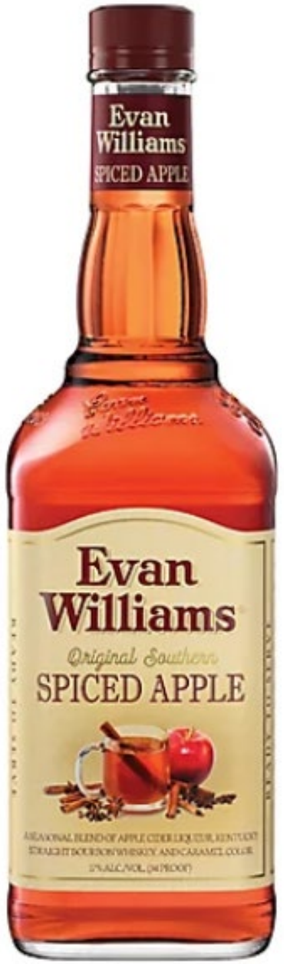


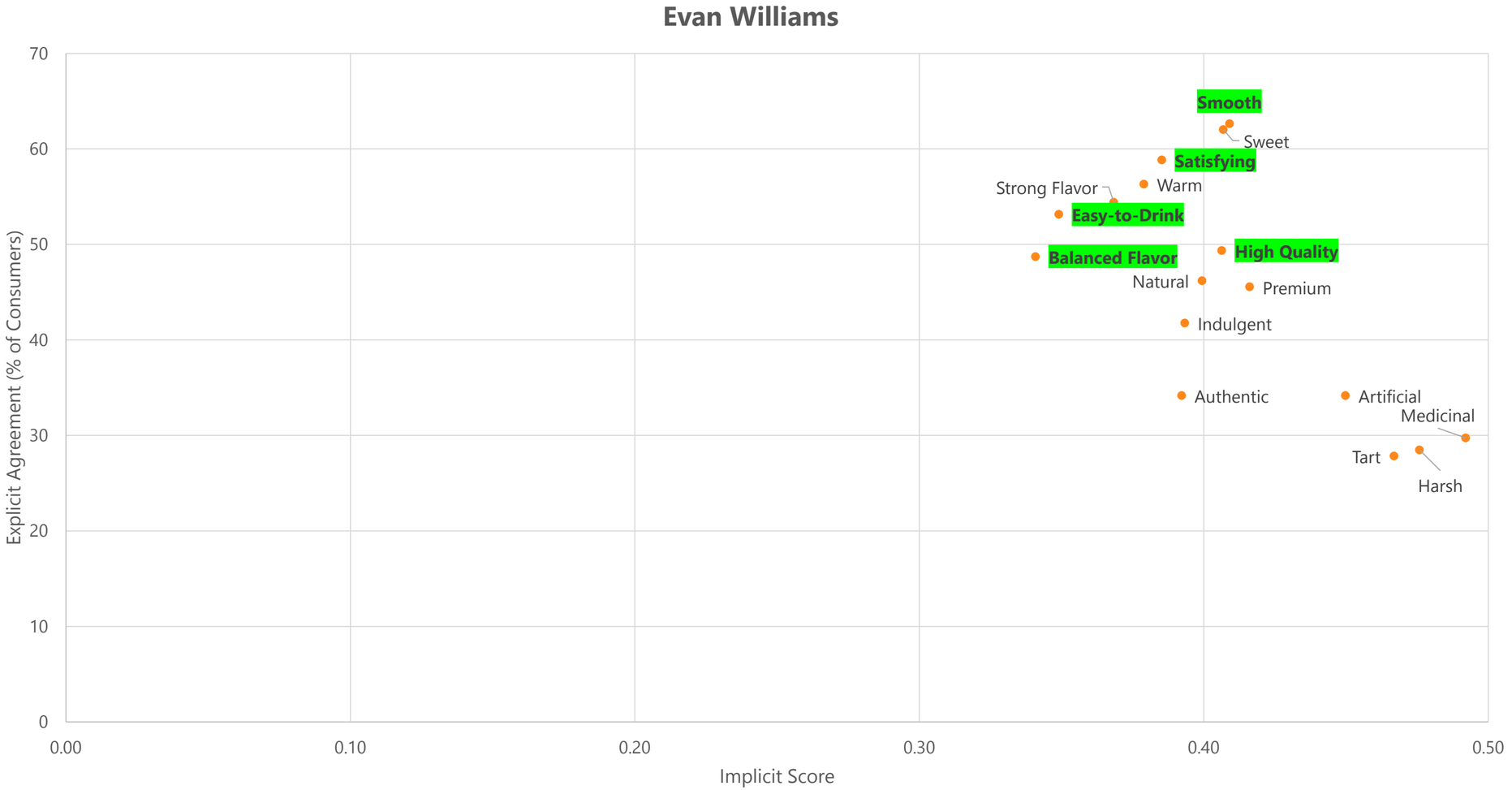
	Evan Williams	Proper Twelve	Crown Royal	Ellington Reserve	Jack Daniel's	Jim Beam
Smooth	**63% bEF**	54% F	59% F	56% F	53% f	43%
Sweet	62% cDEf	57%	53%	50%	52%	53%
Satisfying	**59% bDEF**	49% F	57% DEF	47% F	45% F	35%
Warm	56%	59%	68% AbDF	56%	64% adF	51%
Strong Flavor	54%	61%	62%	63% a	65% Af	58%
Easy-to-Drink	**53% CDEF**	46%	42%	42%	42%	38%
High Quality	**49% F**	46% F	47% F	52% F	44% F	31%
Balanced Flavor	**49%**	46%	52% eF	47%	44%	40%
Natural	46% DF	42% F	44% dF	36%	39% f	31%
Premium	46% F	40% F	46% F	45% F	38% f	29%
Indulgent	42% F	41% F	42% F	34%	42% dF	28%
Artificial	34%	44% aCD	30%	28%	40% CD	47% ACD
Authentic	34%	34%	39%	39%	41% f	32%
Medicinal	30%	35%	32%	33%	34%	38% a
Harsh	28%	41% A	46% AD	37% a	40% A	46% Ad
Tart	28%	37% A	37% A	30%	36% a	40% AD

95% Significance denoted by uppercase ; 90% Significance denoted by lowercase -- N=158

IMPLICIT SURVEY

A higher percentage of consumers also have quick associative reaction times to ‘Smooth’ and ‘Satisfying’ when evaluating Evan Williams.



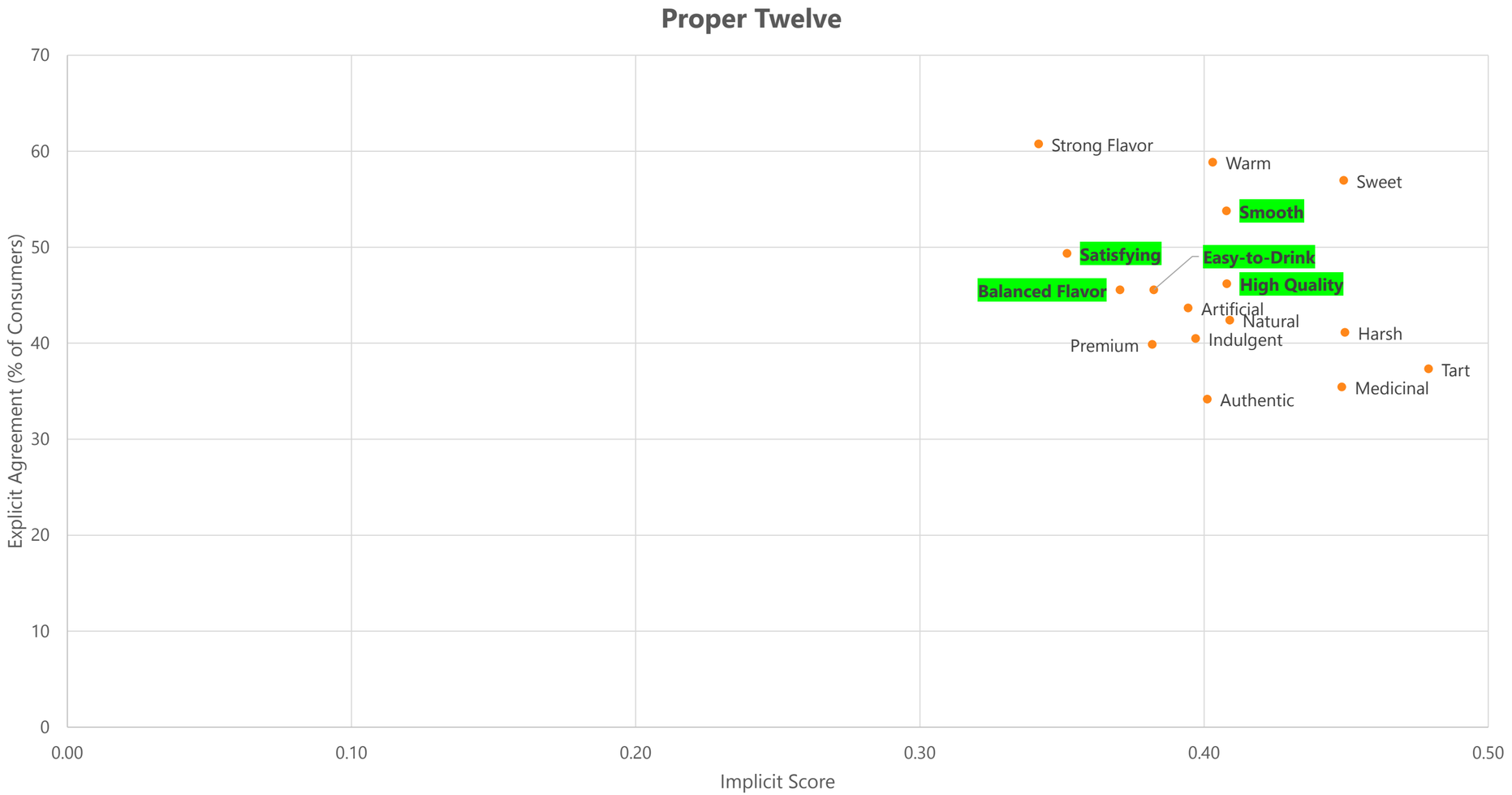


Green Highlight = Top 5 Desired Flavor Attributes for Flavored Whiskey

IMPLICIT SURVEY

A higher percentage of consumers react quicker to ‘Strong Flavor’, ‘Warm’, and ‘Sweet’ when evaluating Proper Twelve.



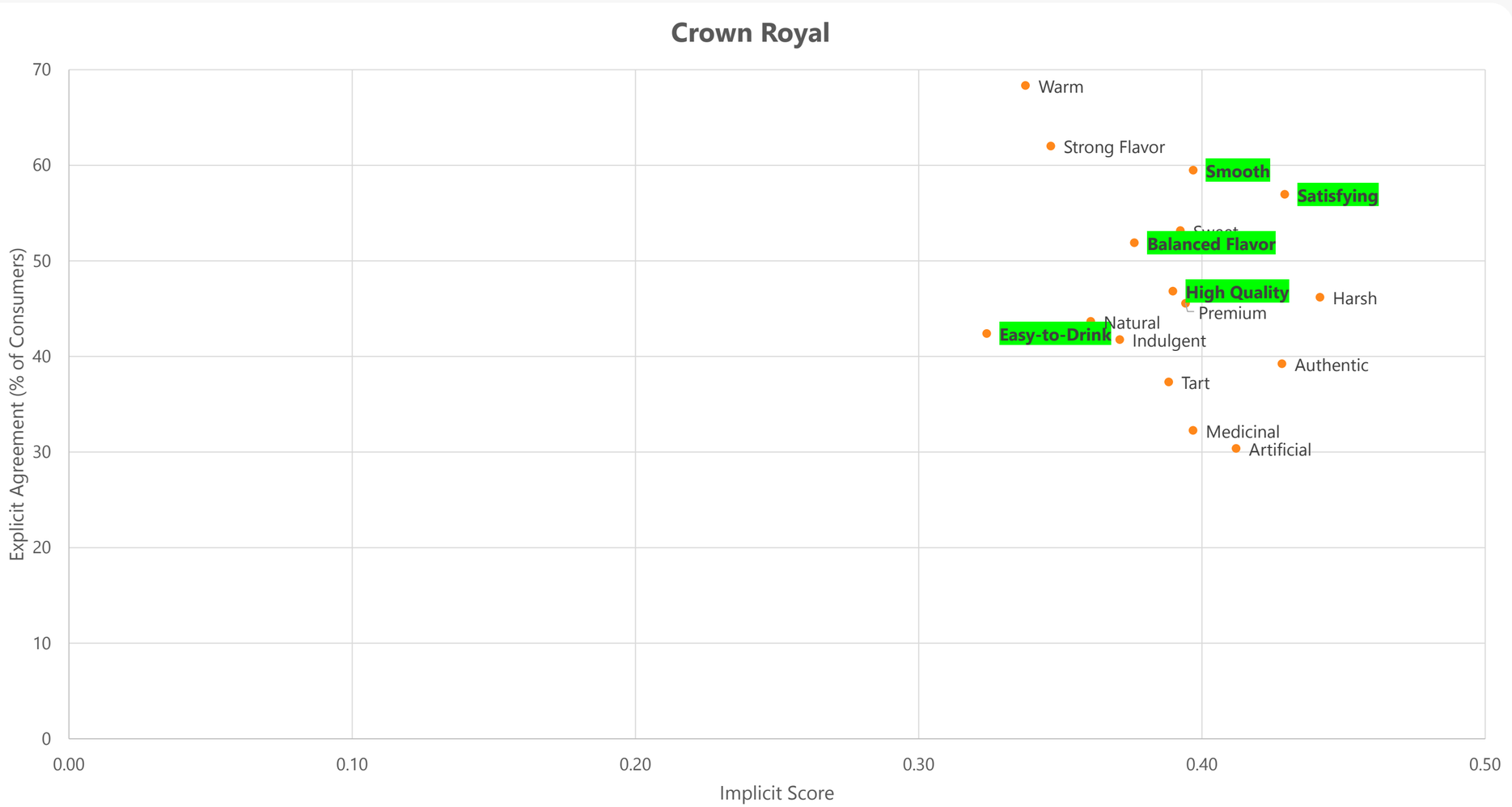


Green Highlight = Top 5 Desired Flavor Attributes for Flavored Whiskey

IMPLICIT SURVEY

A higher percentage of consumers react quicker to ‘Warm’, ‘Strong Flavor’, ‘Smooth’, and ‘Satisfying’ when evaluating Crown Royal, showing a higher association to this sample.



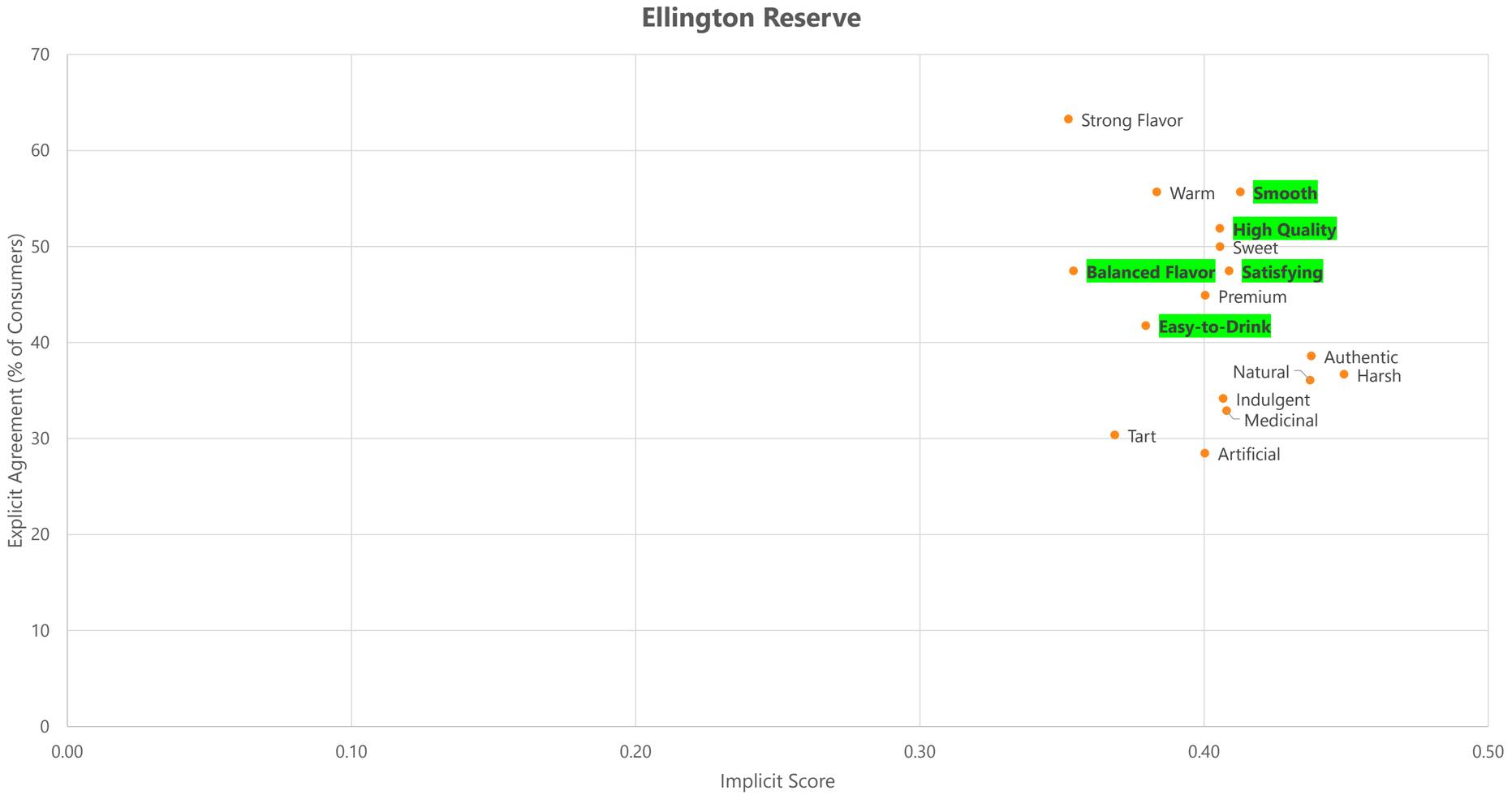


Green Highlight = Top 5 Desired Flavor Attributes for Flavored Whiskey

IMPLICIT SURVEY

A higher percentage of consumers react quicker to ‘Strong Flavor’ and ‘Smooth’ when evaluating Ellington Reserve.



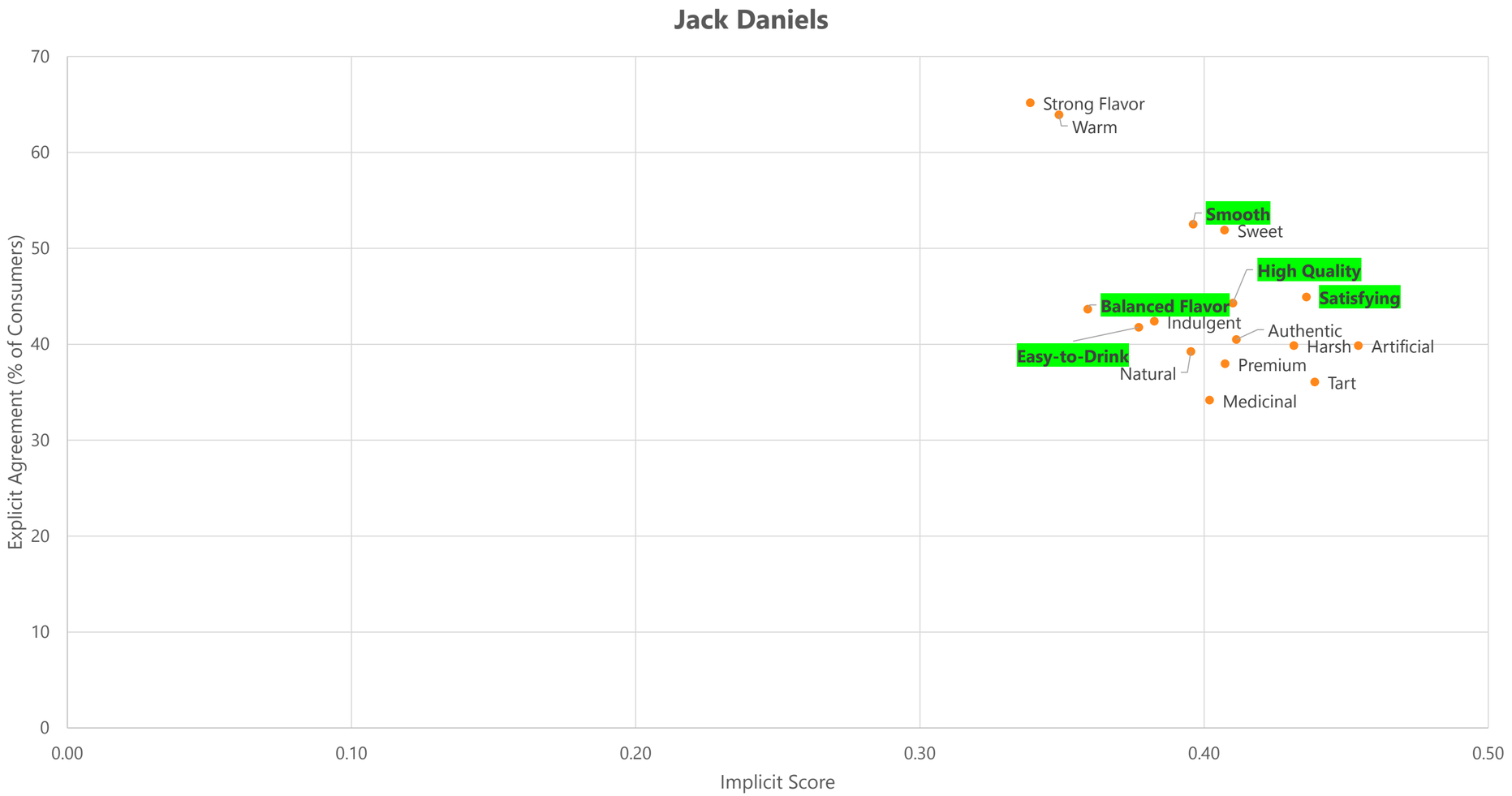


Green Highlight = Top 5 Desired Flavor Attributes for Flavored Whiskey

IMPLICIT SURVEY

A higher percentage of consumers react quicker to ‘Strong Flavor’ and ‘Warm’ when evaluating Jack Daniel's.



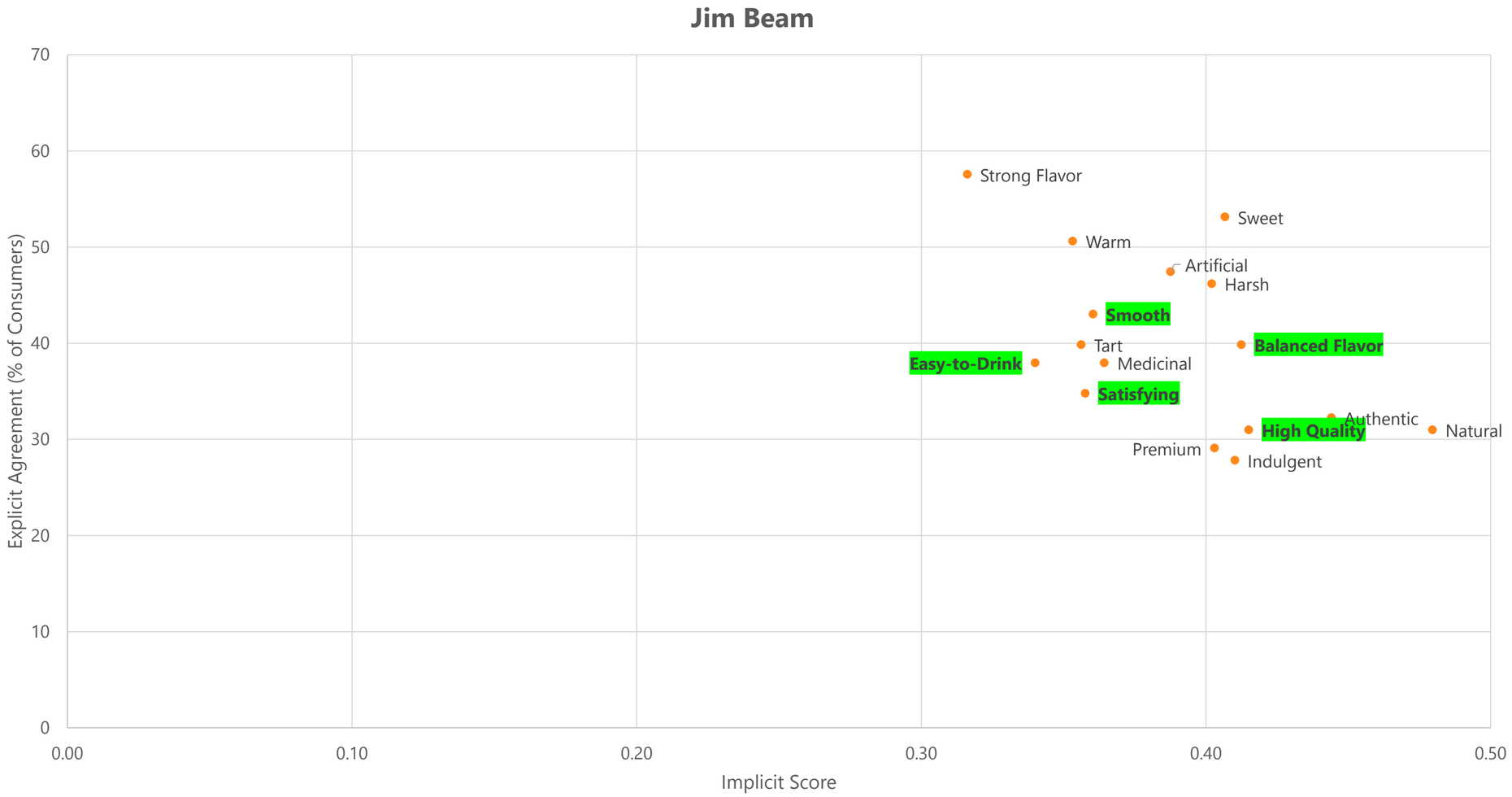


Green Highlight = Top 5 Desired Flavor Attributes for Flavored Whiskey

IMPLICIT SURVEY

A higher percentage of consumers react quicker to ‘Sweet’ when evaluating Jim Beam.





Green Highlight = Top 5 Desired Flavor Attributes for Flavored Whiskey

After tasting, more consumers report Evan Williams as evoking a ‘Relaxed’ feeling, identified as a top desired emotion when consuming flavored whiskey.

Consumers perceive Jim Beam as generating more ‘Nauseated’ emotions than all other Apple Flavored Whiskey samples.

Emotions Describing Whiskey Sample (%)

	 Evan Williams (A)	 Proper Twelve (B)	 Crown Royal (C)	 Ellington Reserve (D)	 Jack Daniel's (E)	 Jim Beam (F)
Relaxed	**57 bcEF**	49 F	49 F	51 F	46 F	34
Happy	50 DeF	43 F	46 DF	37	41 F	30
Social	47	51 eF	46	46	42	41
Calm	47 beF	39	40	40	38	33
Celebratory	37 DEF	34 F	36 deF	28	28	23
Indulgent	35 F	33 F	39 F	34 F	32 F	20
Confident	32 F	33 F	35 F	34 F	34 F	20
Special	32 dF	26 F	27 F	24 F	28 F	16
Popular	22 f	16	19	18	17	15
Wealthy	17 F	16 F	18 dF	12	18 dF	9
Important	16	14	19 F	18 f	18 F	11
Nauseated	11	16	13	12	11	29 ABCDE

95% Significance denoted by uppercase ; 90% Significance denoted by lowercase -- N=158

All apple flavored whiskeys are similarly liked, except for Jim Beam, which is liked least; however, a significantly higher number of consumers prefer Evan Williams over the other whiskeys.

	 Evan Williams (A)	 Proper Twelve (B)	 Crown Royal (C)	 Ellington Reserve (D)	 Jack Daniel's (E)	 Jim Beam (F)
Overall Liking (Mean, 9pt scale)	**6.8 F**	**6.7 F**	**6.7 F**	**6.7 F**	**6.6 F**	5.5
Preferred Most (% consumers)	**27% BCDEF**	16%	14%	12%	16%	14%
Preferred Least (% of consumers)	16%	14%	12%	17%	14%	**27% ABCDE**
Mean Rank (lower the better)	3.2 F	3.5	3.4	3.6	3.5	3.9

95% Significance denoted by uppercase ; 90% Significance denoted by lowercase -- N=158

Products on the right side of the map can be described as Nauseating, Artificial, and Medicinal.

Products on the left side of the map can be described as Indulgent, Premium, Satisfying and High in Quality.

Products on the upper part of the map have a sweeter profile and those on the bottom side a stronger, more harsh profile.

Evan Williams is described as one of the most Smooth, Sweet, Easy-to-Drink and Satisfying whiskeys in the array, with associations to Relaxed, Happy and Calm.

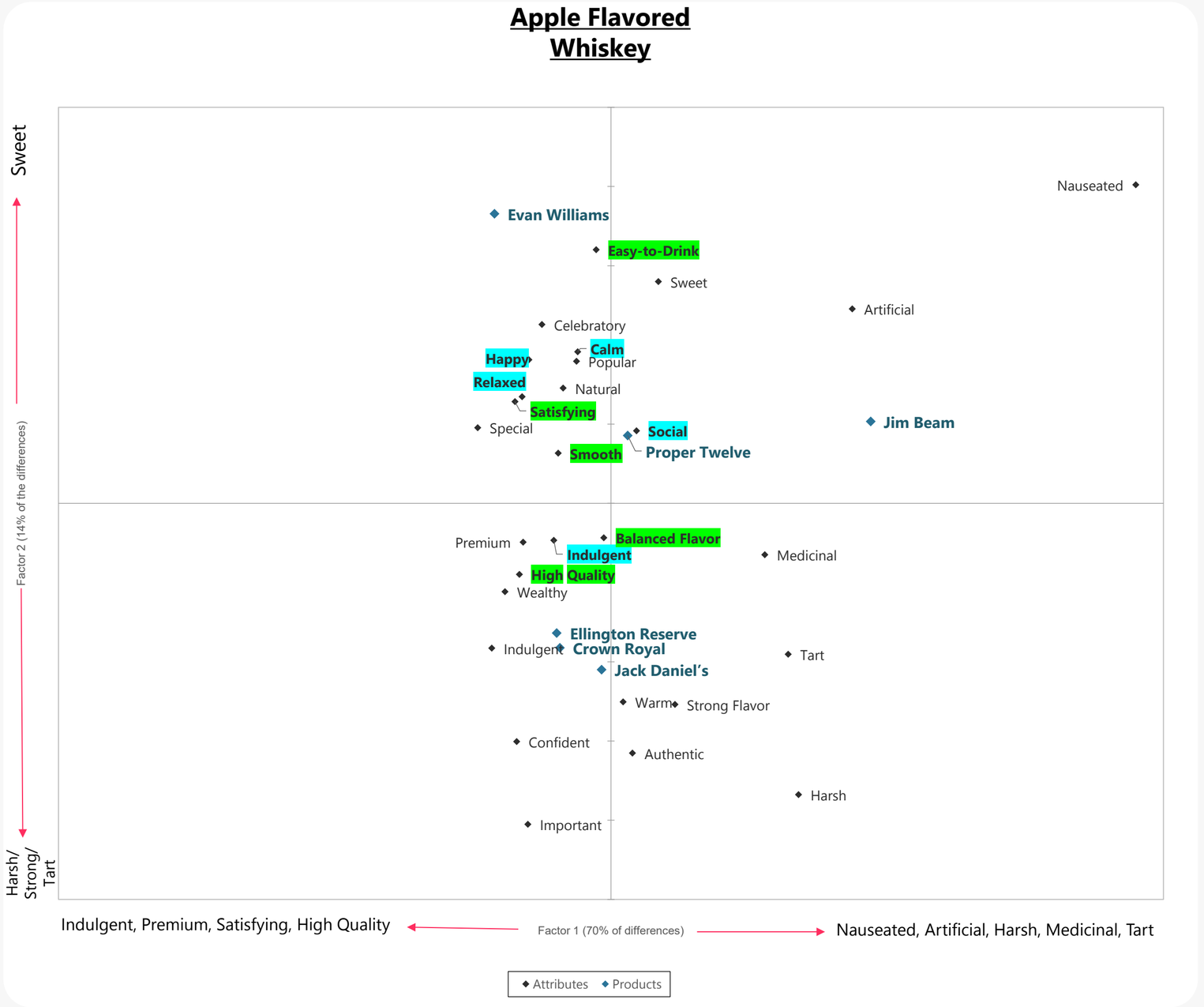
Proper Twelve whiskey stands out as Social and Sweet but is also described as artificial.

Crown Royal, Ellington Reserve, and Jack Daniel's are all rated high in Indulgent and Confident with a stronger profile that is less sweet and less authentic.

Jim Beam is the outlier of the whiskeys, described as Artificial, Harsh, Medicinal and Tart while evoking Nauseated feelings.

Green Highlight = Top 5 Desired Flavor Attributes for Flavored Whiskey

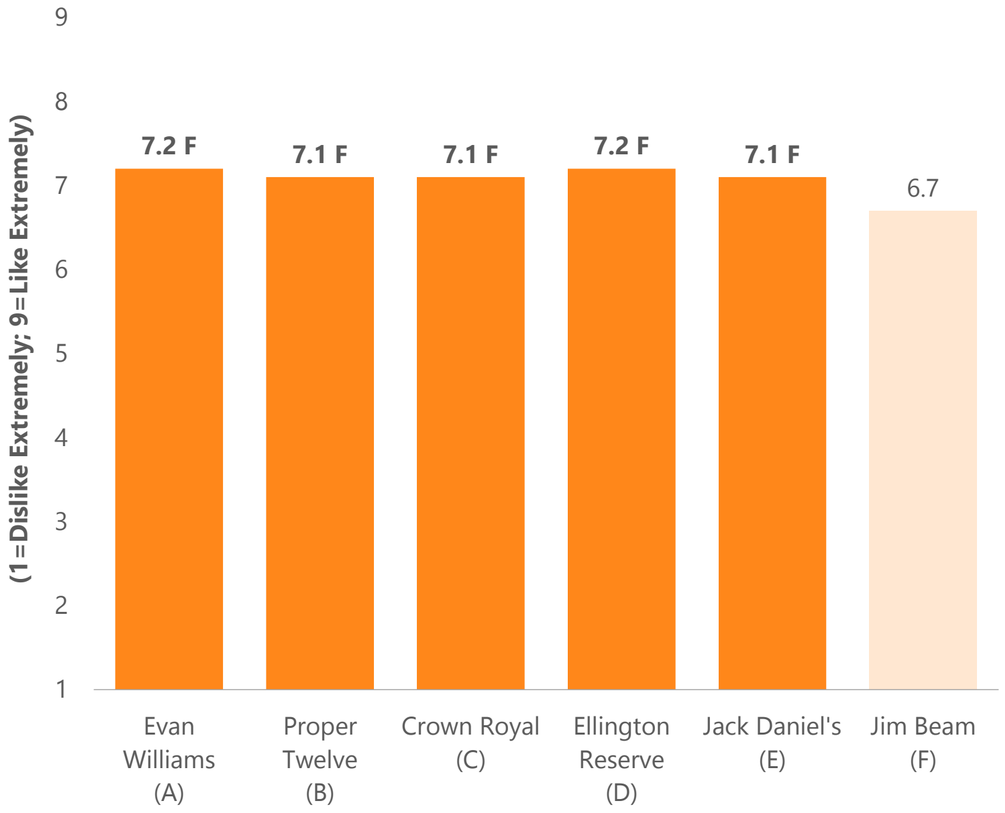
Blue Highlight = Top 5 Emotions When Drinking Flavored Whiskey



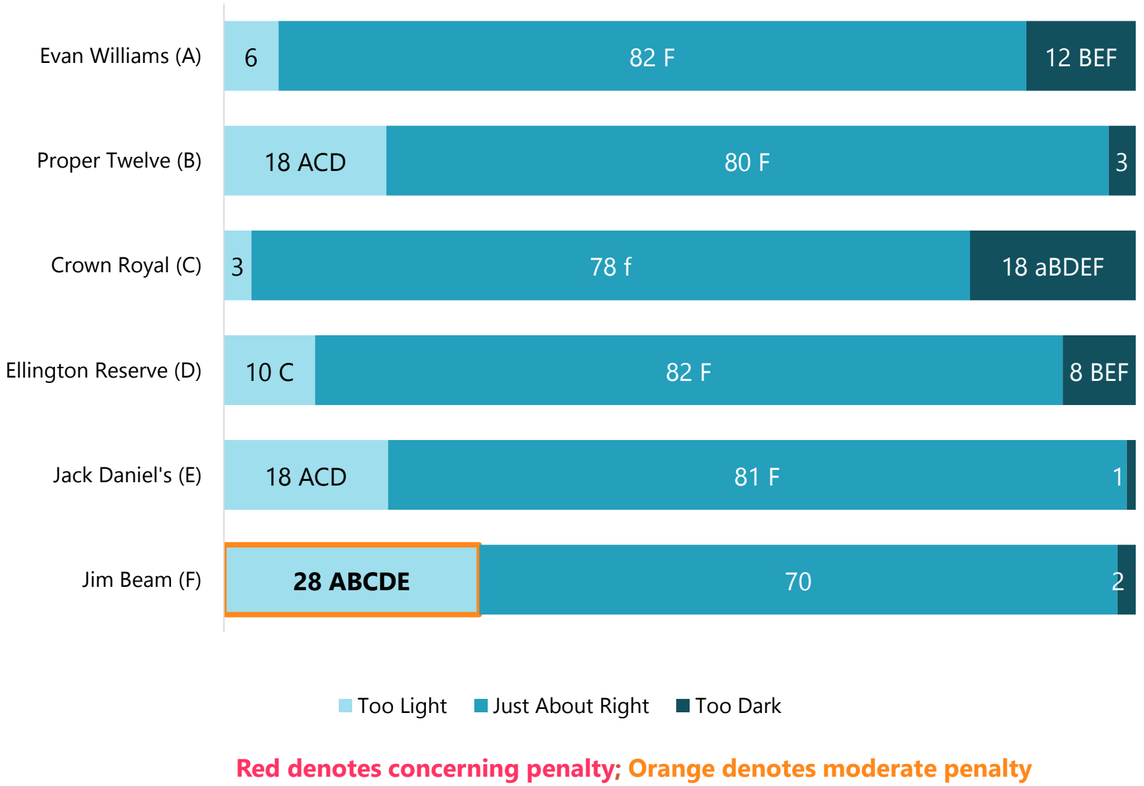
N=158

Jim Beam is disadvantaged in Appearance Liking compared to all other apple flavored whiskey samples due to the Color being 'Too Light.'

Appearance Liking (Mean, 9pt scale)



Color JAR (%)



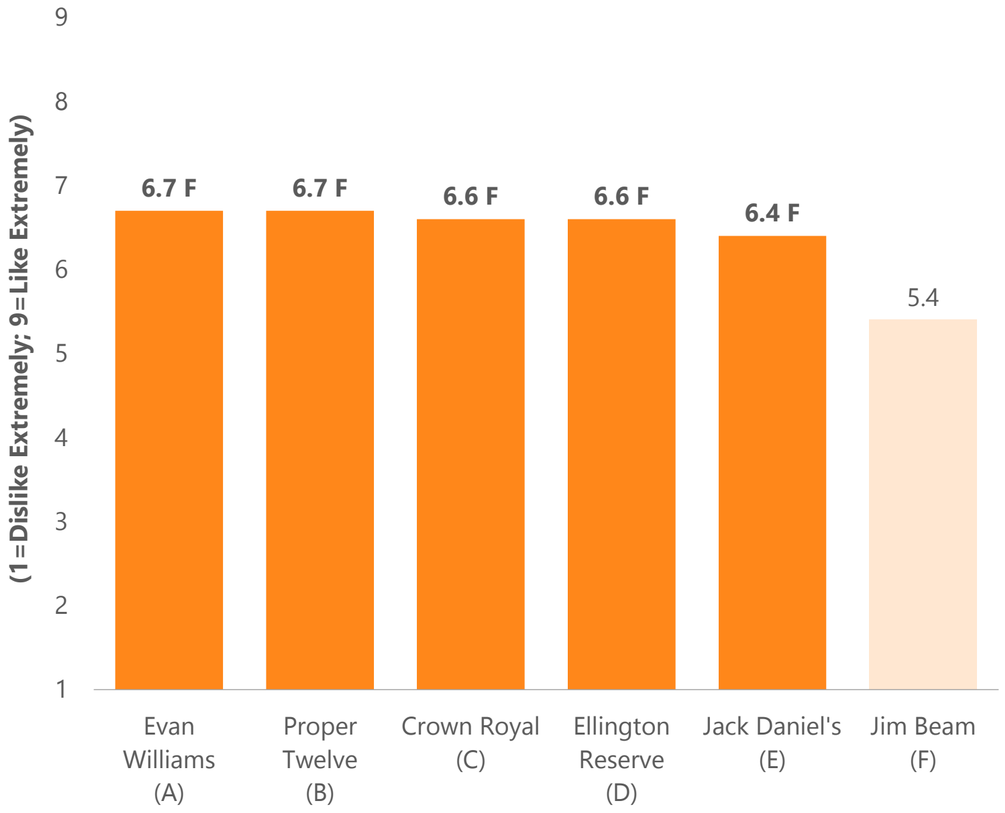
Red denotes concerning penalty; Orange denotes moderate penalty

95% Significance denoted by uppercase ; 90% Significance denoted by lowercase -- N=158

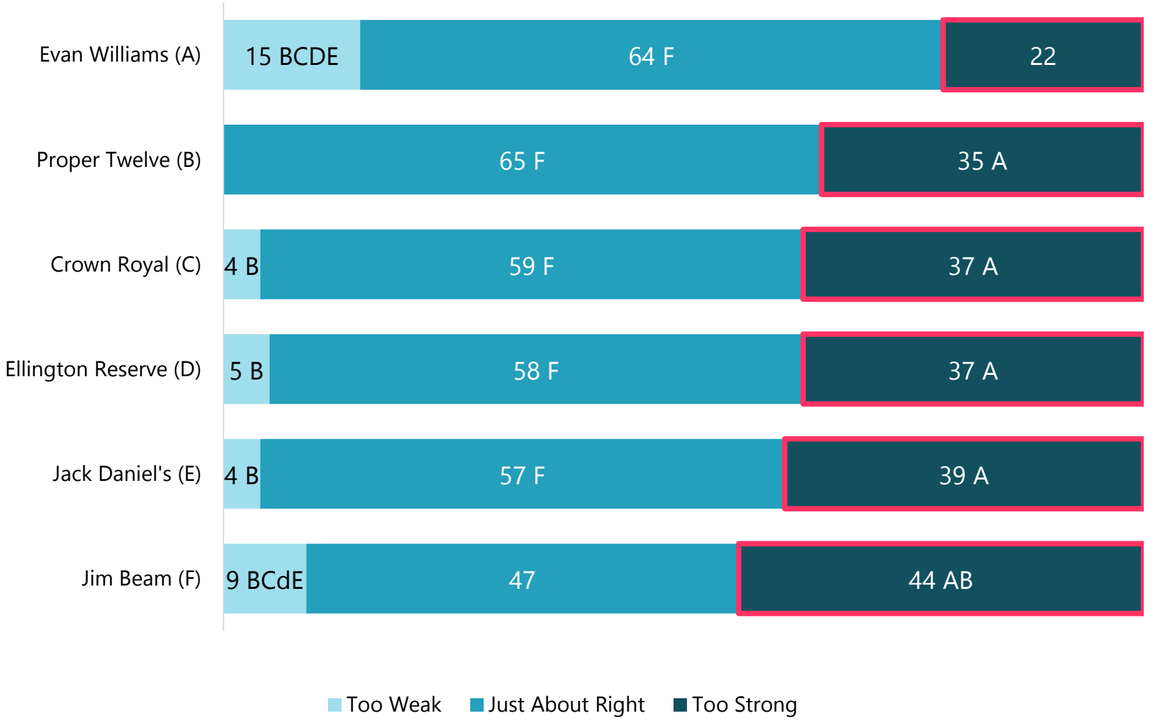
Similarly, Jim Beam is disadvantaged in Flavor Liking compared to all other apple flavored whiskey samples.

While the Overall Flavor of all samples is 'Too Strong', Evan Williams is less so compared to the other products.

Flavor Liking (Mean, 9pt scale)



Overall Flavor JAR (%)

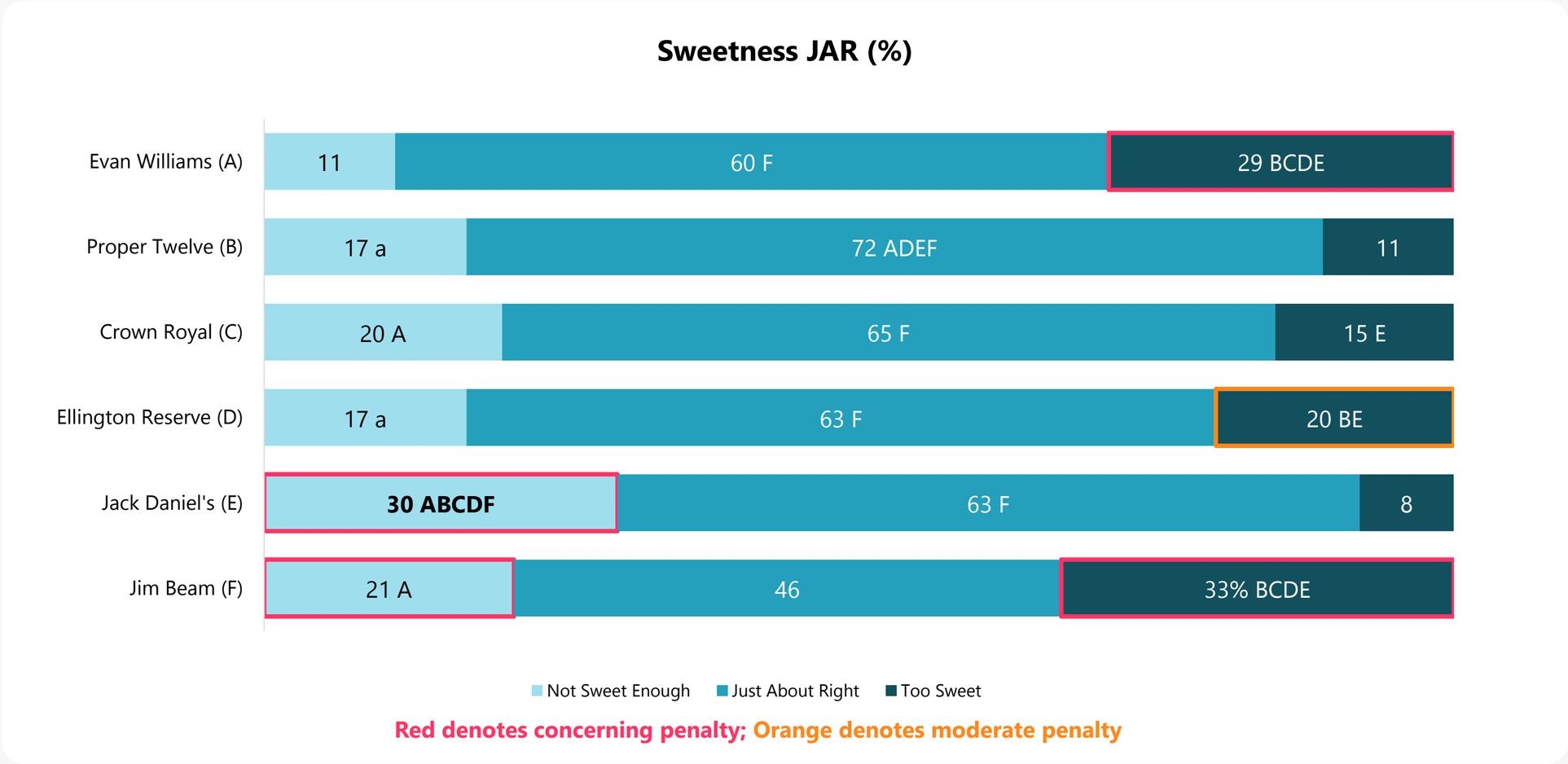


Red denotes concerning penalty; Orange denotes moderate penalty

95% Significance denoted by uppercase ; 90% Significance denoted by lowercase -- N=158

While Sweetness may be important, being “too sweet” may not be a bad thing; it is more about balance.

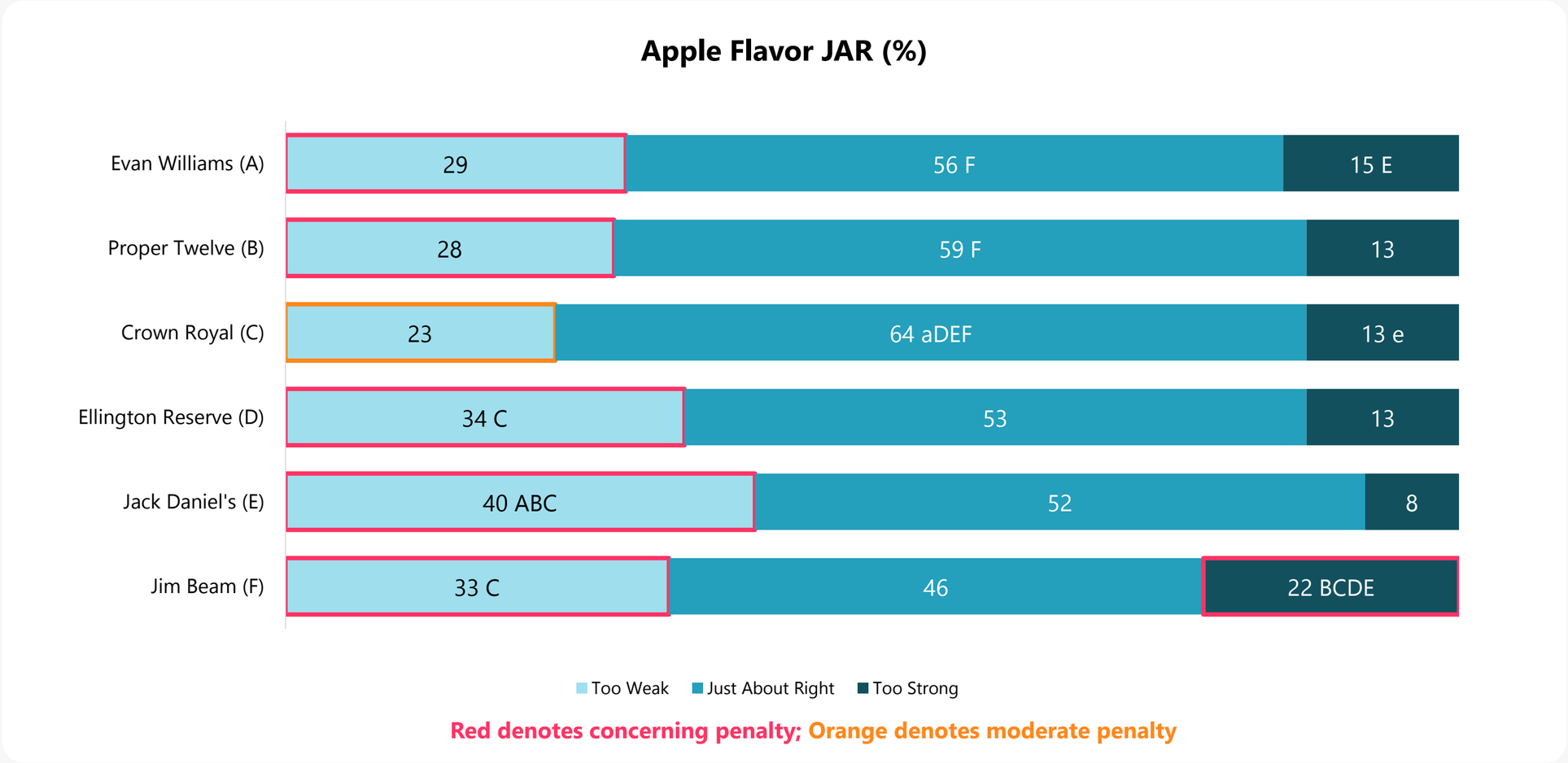
One of the most liked products - Evan Williams - and disliked products - Jim Beam - are described as ‘Too Sweet’; however, consumers also perceive Jim Beam as “not sweet enough.”



95% Significance denoted by uppercase ; 90% Significance denoted by lowercase -- N=158

Many consumers describe the apple flavor in all samples as ‘Too Weak.’

A quarter of consumers also think the apple flavor in Jim Beam is ‘Too Strong’ which indicates an imbalance in the flavor.



95% Significance denoted by uppercase ; 90% Significance denoted by lowercase -- N=158

CURION Score

Overview

Curion Score™ leverages product performance of the full product story in one single metric. Instead of just looking at overall liking which is sometimes similar between products, Curion Score helps recognize advantages for a product that accounts for other liking and diagnostic (Just-about-right) metrics. In addition, Curion Score relays how well a product performs when compared to other like products within the Curion Database.

Curion Score is a comparative against a Database Score. In this case, we are comparing the products to the Flavored Spirits Category Average.

Individual Score Metrics are based on a 100-pt scale; however, Flavored Spirits have a range of 30.5-62.6 with an average of 50.0.

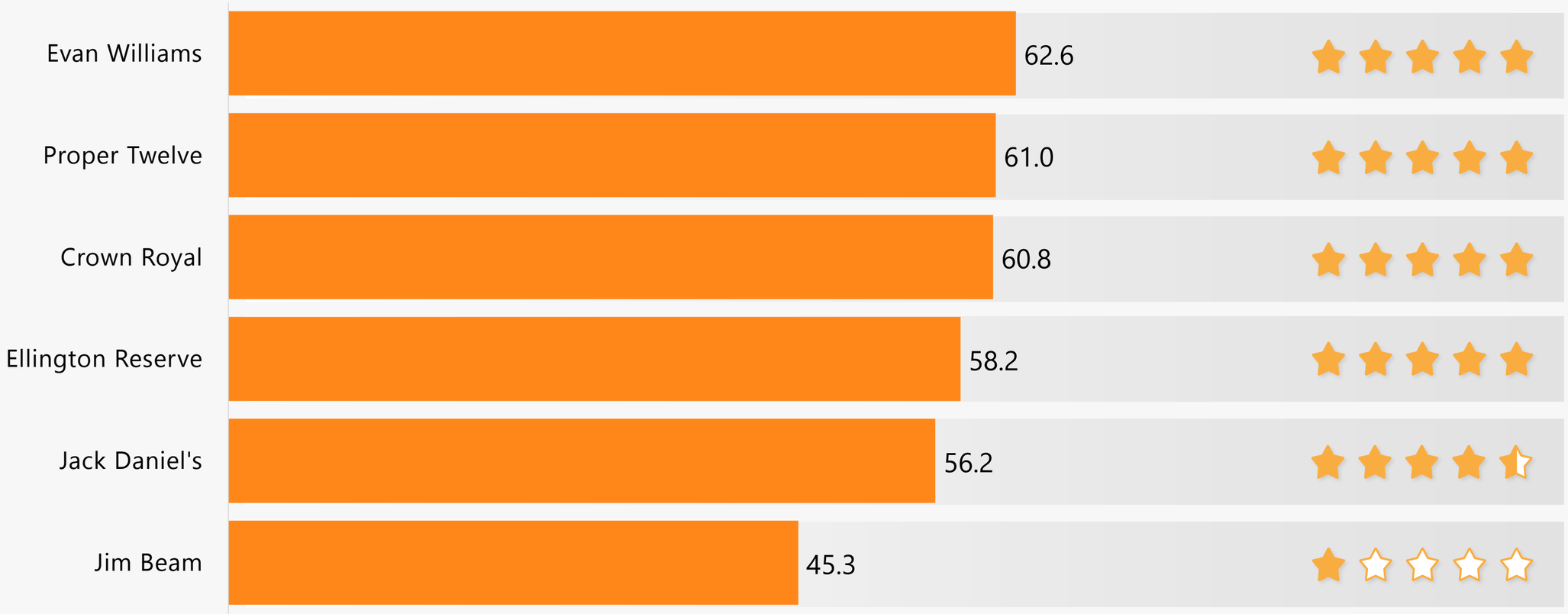
Comparison to database categories are presented as Stars which represent percentiles. 2.5 stars means your product is on par with the average for the category.

Avg for Category

Stars	0.5	1	1.5	2	2.5	3	3.5	4	4.5	5
%tile Cut Offs	0-9.99%	10-19.99%	20-29.99%	30-39.99%	40-49.99%	50-59.99%	60-69.99%	70-79.99%	80-89.99%	90-100%

In addition, all apple flavored whiskey samples receive Curion Scores™ above average in the Flavored Spirits Category, except for Jim Beam, which only scores in the 20 percentile

Curion Score™ Flavored Spirits Category Average: 50.0



N=158

Overview of Consumer Segments

Since we understand not all consumers like the same products, we create **consumer segments** to group them based on their liking across the different flavored whiskeys.

Typically, Overall Liking is used to segment consumers; however, instead of overall liking, Curion Score™ can be used as an alternative.

The advantages of using Curion Score™ in the segmentation is it **better differentiates the products**, resulting in less consumers who “like” or “dislike” all products equally.

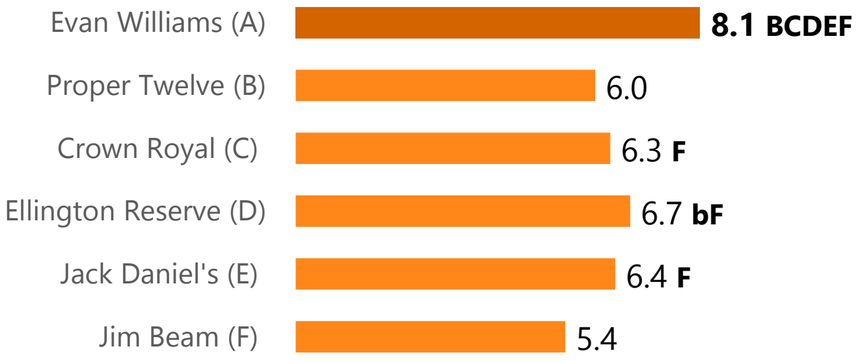
For apple flavored whiskey, **three groups or segments of consumers are identified** based on how much they like/dislike the products.



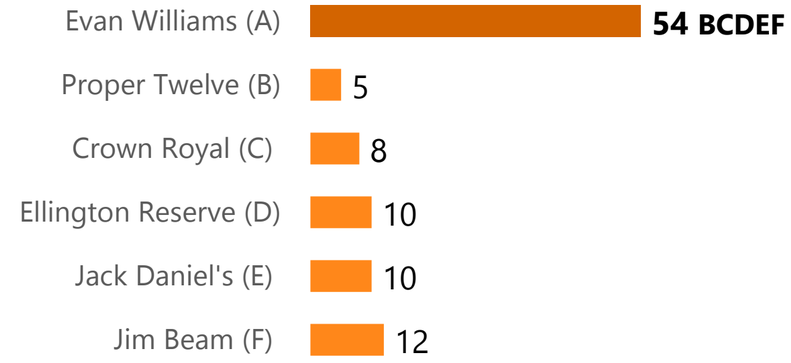
Consumers in Segment 1 like Evan Williams apple flavored whiskey best.

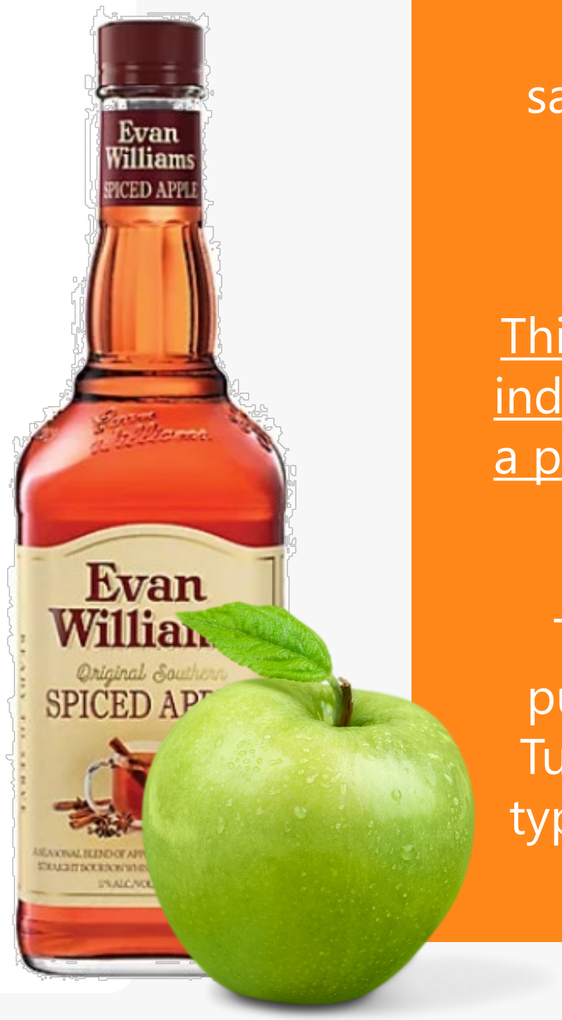
SEGMENT 1 (37% of consumers)

Overall Liking (Mean, 9pt scale)



Preference Ranking (%) – Ranked 1st





This consumer likes the profile of Evan Williams, describes it as sweet, satisfying, high quality and smooth, and finds it elicits more positive emotions than other products.

This Consumer Segment slightly over-indexes as female, 22-38 in age and as a purchaser of caramel/maple flavored whiskeys.

This also slightly over-indexes for purchase of Evan Williams and Wild Turkey Whiskeys, although she most typically purchases Crown Royal, Jack Daniel's and Jim Beam.

95% Significance denoted by uppercase ; 90% Significance denoted by lowercase -- N=59

These consumers also associate all 5 top purchase motivators (in bold) with Evan Williams more than the other products

SEGMENT 1

	 Evan Williams	 Proper Twelve	 Crown Royal	 Ellington Reserve	 Jack Daniel's	 Jim Beam
Smooth	**75% BdEF**	44%	61% BF	59% bF	54% f	41%
Sweet	69% BCDEF	44%	53%	51%	51%	46%
Satisfying	**78% BCDEF**	36%	58% BF	53% BF	47% F	31%
Warm	64% BCDEF	32%	41%	46% f	39%	31%
Strong Flavor	76% BCDEF	39%	42% f	53% bF	44% f	29%
Easy-to-Drink	**59% BeF**	32%	51% BF	54% BF	44% f	29%
High Quality	**59% BCDEF**	32%	42%	34%	34%	31%
Balanced Flavor	**63% BCdEF**	34% F	46% F	49% bF	42% F	17%
Natural	51% BF	31%	51% BF	37% f	37%	24%
Premium	63%	56%	75% BF	66% f	69% f	54%
Indulgent	59%	68%	73% a	63%	68%	66%
Artificial	32%	53% ACD	36%	31%	42%	53% ACD
Authentic	54% BcdF	32%	41% f	39% f	42% F	25%
Medicinal	25%	51% A	41% A	47% A	41% A	42% A
Harsh	24%	61% AE	56% Ae	53% A	41% A	54% Ae
Tart	31%	44% A	39%	32%	37%	44% a

95% Significance denoted by uppercase ; 90% Significance denoted by lowercase -- N=59

Emotion Descriptors for Segment 1

SEGMENT 1

Emotions Describing Whiskey Sample (%)

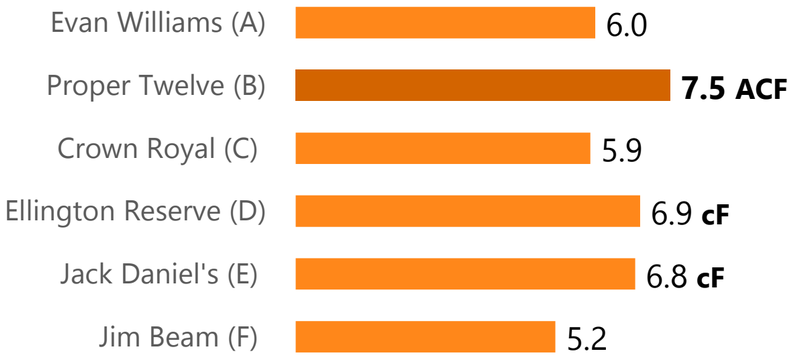
	 Evan Williams (A)	 Proper Twelve (B)	 Crown Royal (C)	 Ellington Reserve (D)	 Jack Daniel's (E)	 Jim Beam (F)
Relaxed	**66% BCEF**	34%	39%	54% BcEF	37%	29%
Happy	**64% BCDEF**	36%	37%	36%	41% f	25%
Social	**58% CF**	49%	41%	46%	46%	39%
Indulgent	**56% BCDEF**	31%	39% eF	31%	27%	20%
Celebratory	**53% BCDEF**	31%	36% f	34% f	32% f	20%
Calm	**51% BCEF**	31%	34%	49% BCEF	34%	34%
Special	**49% BCDEF**	20%	22%	27%	31% f	19%
Confident	**47% bCdF**	34% F	29%	34% F	36% F	17%
Popular	**32% BCDEF**	8%	19% b	20% B	17%	14%
Wealthy	**27% BDF**	10%	17%	14%	22% bf	10%
Important	24% BF	10%	19% F	19% F	22% bF	7%
Nauseated	-	24% ADE	17% A	10% A	10% A	32% ACDE

95% Significance denoted by uppercase ; 90% Significance denoted by lowercase -- N=59

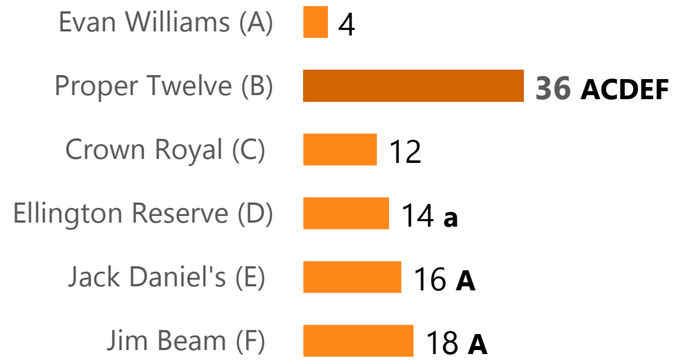
Consumers in Segment 2 like Proper Twelve apple flavored whiskey best.

SEGMENT 2 (32% of consumers)

Overall Liking (Mean, 9pt scale)



Preference Ranking (%) – Ranked 1st





This consumer likes the profile of Proper Twelve, describing it as sweet, satisfying, easy-to-drink, high quality and smooth, and finds it elicits more positive emotions than other products.

While equal in gender, they slightly over-index for the 39-64 age group and besides apple whiskey, are not heavy purchasers of other flavored whiskeys. They also under-index for purchase of most whiskey brands.

95% Significance denoted by uppercase ; 90% Significance denoted by lowercase -- N=50

These consumers also associate all 5 top purchase motivators (in bold) with Proper Twelve more than the other products

SEGMENT 2						
	Evan Williams	**Proper Twelve**	**Crown Royal**	**Ellington Reserve**	**Jack Daniel's**	**Jim Beam**
Smooth	48%	**62% CF**	40%	50%	56% cF	36%
Sweet	54%	74% ACDf	46%	48%	66% Cd	60% c
Satisfying	44%	**64% ACDEF**	36%	42%	40%	30%
Warm	56%	52%	60% F	50%	60% f	44%
Strong Flavor	44%	48%	54%	54%	66% ABF	42%
Easy-to-Drink	42%	**62% ACdF**	30%	46% C	50% C	42%
High Quality	30%	**56% ACEF**	30%	52% ACF	40%	30%
Balanced Flavor	34%	**54% Ac**	38%	40%	50% a	44%
Natural	32%	48% AF	38%	36%	46% aF	28%
Premium	32%	40%	28%	44% c	40%	30%
Indulgent	32%	48% ACdF	22%	32%	46% aCdF	28%
Artificial	32%	30%	30%	24%	32%	50% ABCDe
Authentic	18%	48% AC	24%	36% Ac	36% A	36% A
Medicinal	30% d	20%	32% D	16%	22%	32% D
Harsh	38% Bd	22%	46% BD	22%	36%	44% BD
Tart	26%	32%	38% d	26%	34%	42% Ad

95% Significance denoted by uppercase ; 90% Significance denoted by lowercase -- N=50

Emotion Descriptors for Segment 2

SEGMENT 2

Emotions Describing Whiskey Sample (%)

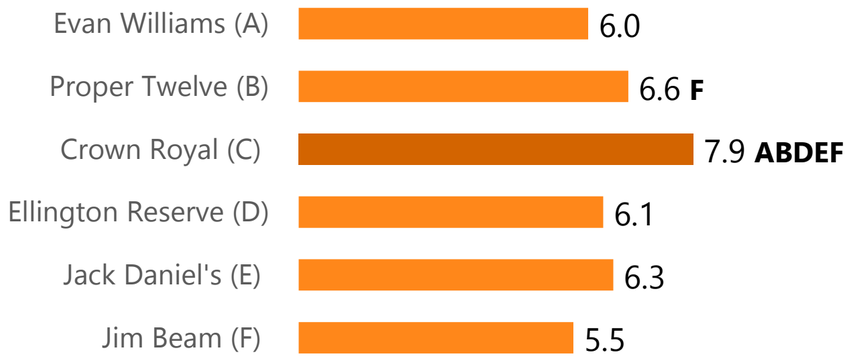
	 Evan Williams (A)	 Proper Twelve (B)	 Crown Royal (C)	 Ellington Reserve (D)	 Jack Daniel's (E)	 Jim Beam (F)
Relaxed	42%	60% ACDeF	38%	42%	44%	36%
Happy	38%	52% AcdF	38%	38%	46% F	26%
Social	34%	52% ACe	32%	38%	36%	40%
Calm	40%	48% CdEf	26%	30%	32%	32%
Indulgent	24%	38% Af	32%	30%	38% af	22%
Celebratory	30%	36% f	28%	26%	26%	22%
Special	24% F	34% F	26% F	26% F	36% F	10%
Confident	22%	32%	26%	40% AcF	30%	24%
Popular	16%	22%	16%	14%	14%	12%
Wealthy	8%	20% Ac	12%	10%	16%	12%
Important	12%	14%	10%	16%	18%	10%
Nauseated	22% BE	8%	22% BE	14%	10%	36% aBcDE

95% Significance denoted by uppercase ; 90% Significance denoted by lowercase -- N=50

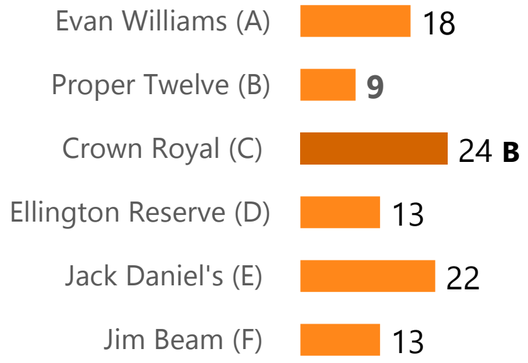
Consumers in Segment 3 like Crown Royal apple flavored whiskey best.

SEGMENT 3 (28% of consumers)

Overall Liking (Mean, 9pt scale)



Preference Ranking (%) – Ranked 1st





This consumer likes the profile of Crown Royal, describing it as smooth, satisfying, easy-to-drink, high quality and balanced.

Surprisingly, this consumer does not describe their most liked product as “sweet”, unlike the other segments. More consumers in this segment feel that Crown Royal elicits more positive emotions than other products.

While equal in gender, they very slightly over-index for the 39-64 age group and besides apple whiskey, they are purchasers of cinnamon and vanilla flavors.

This segments reflects the total population for brand purchase.

95% Significance denoted by uppercase ; 90% Significance denoted by lowercase -- N=45

These consumers also associate all 5 top purchase motivators (in bold) with Crown Royal more than the other products.

SEGMENT 3						
	Evan Williams	**Proper Twelve**	**Crown Royal**	**Ellington Reserve**	**Jack Daniel's**	**Jim Beam**
Smooth	60%	56%	**76% abDEF**	56%	44%	49%
Sweet	60% dE	51% e	58% E	47%	33%	51% e
Satisfying	49%	47%	**76% ABDEF**	42%	42%	42%
Warm	44%	67% ADf	67% ADF	47%	60% a	49%
Strong Flavor	56%	62%	56%	71% ac	58%	60%
Easy-to-Drink	49% De	42%	**60% bDEF**	29%	33%	38%
High Quality	31%	42%	**69% ABDEF**	47% af	44%	29%
Balanced Flavor	49% e	49% e	**64% abDEF**	42%	33%	47%
Natural	40%	44%	49% F	36%	36%	29%
Premium	33%	42% e	62% ABDEF	36%	27%	38%
Indulgent	36%	42% d	47% Df	27%	40% D	29%
Artificial	38% Cd	42% CD	18%	24%	42% Cd	33% c
Authentic	22%	18%	49% ABF	36% B	38% AB	31%
Medicinal	31% c	29%	18%	27%	38% C	36% c
Harsh	24%	38% a	31%	33%	47% Acd	40%
Tart	24%	29%	33%	31%	31%	33%

95% Significance denoted by uppercase ; 90% Significance denoted by lowercase -- N=45

Emotion Descriptors for Segment 3

SEGMENT 3

Emotions Describing Whiskey Sample (%)

	 Evan Williams (A)	 Proper Twelve (B)	 Crown Royal (C)	 Ellington Reserve (D)	 Jack Daniel's (E)	 Jim Beam (F)
Relaxed	58% F	51%	**71% BDEF**	56% f	56% F	38%
Happy	40%	42%	**62% ABDEF**	36%	33%	36%
Social	44%	53%	62% AEF	51%	42%	40%
Calm	51% F	40%	62% BDeF	38%	49% F	31%
Confident	20%	31% f	**47% ABDEF**	27%	33% AF	18%
Celebratory	24%	29%	**44% AbDEF**	20%	22%	27%
Indulgent	16%	27%	**42% AbeF**	40% AF	27%	16%
Special	16%	20%	**33% AbDEF**	13%	16%	16%
Important	7%	16%	24% AE	16% a	11%	13%
Wealthy	13% f	13% F	22% DF	9%	13% f	4%
Popular	11%	18%	20%	13%	18%	18%
Nauseated	16% C	16% C	-	13% C	16% C	20% C

95% Significance denoted by uppercase ; 90% Significance denoted by lowercase -- N=45

Summary of Segments

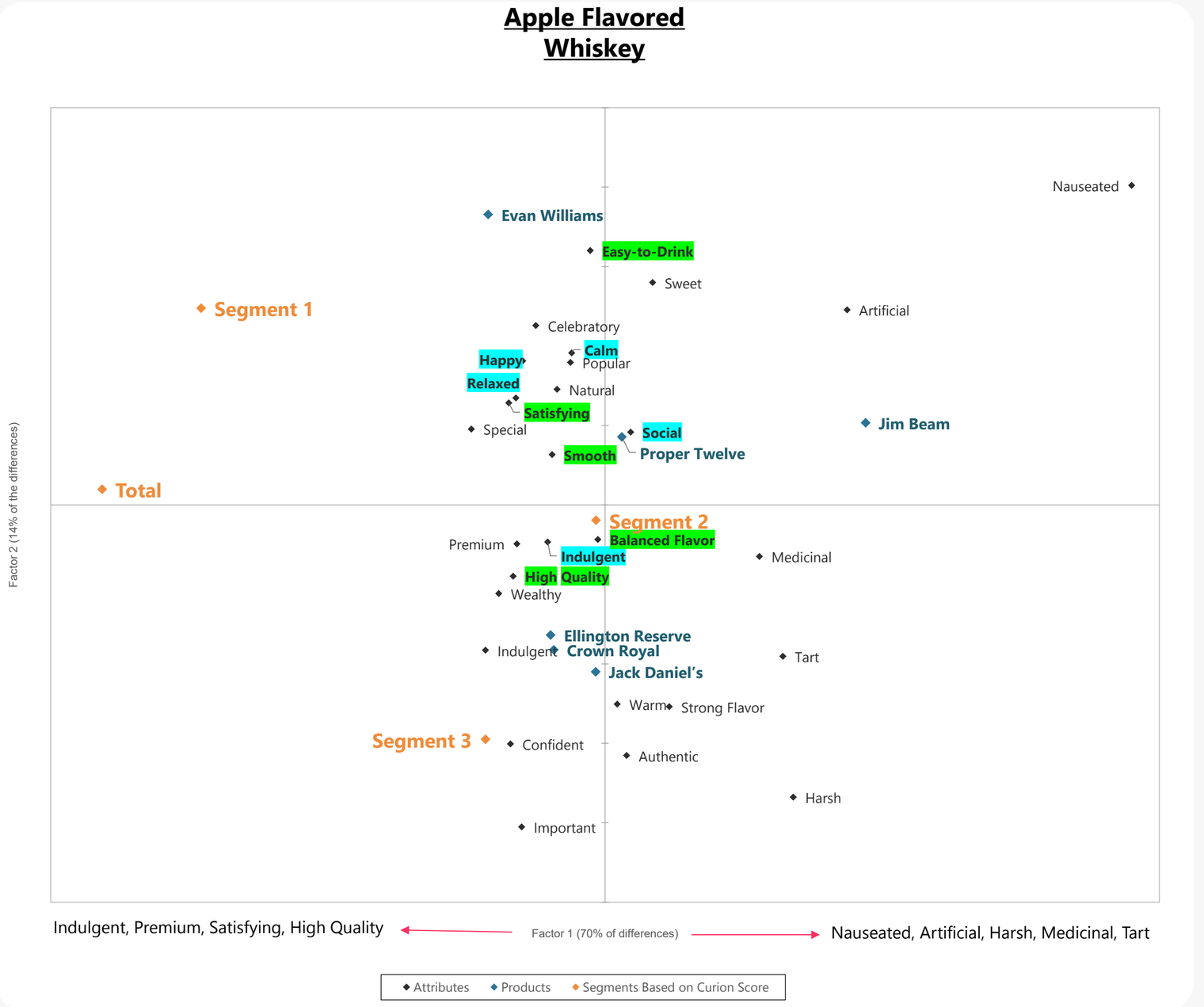
In summary, both the Total Consumer Base and Segment 1 like Smooth, Sweet, Easy-to-Drink and Satisfying with associated Relaxed, Happy and Calm feelings. Additional formulations that include Indulgent, Premium and High Quality may also be key to satisfying these consumers.

Segment 2 gravitates more with a Sweet/ Artificial profile positioned as Social.

Segment 3 likes a whiskey that is less sweet and has a stronger flavor that may be more authentic.

Green Highlight = Top 5 Desired Flavor Attributes for Flavored Whiskey

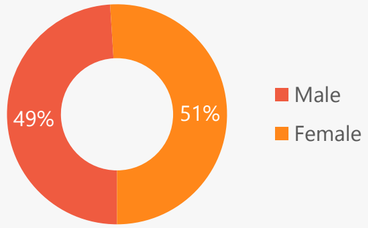
Blue Highlight = Top 5 Emotions When Drinking Flavored Whiskey



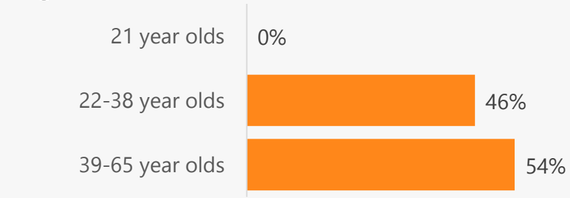
N=158

TOTAL N=158*

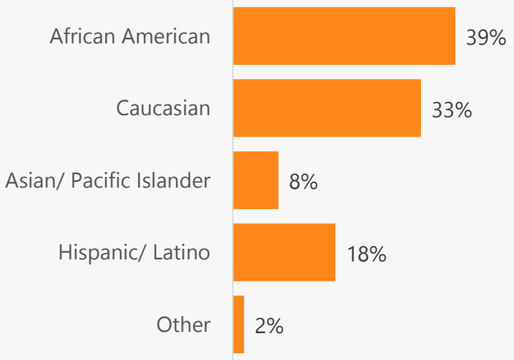
Gender



Age



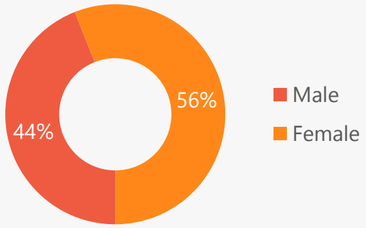
Ethnicity



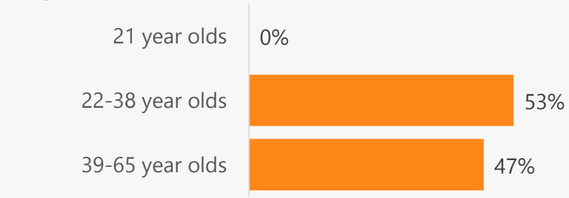
*4 consumers removed from segmentations based on non-discriminatory data

SEGMENT 1 N=59

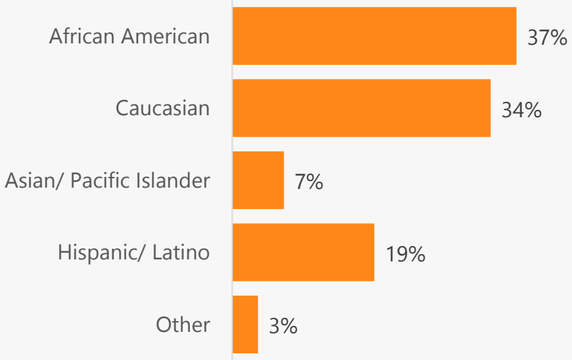
Gender



Age

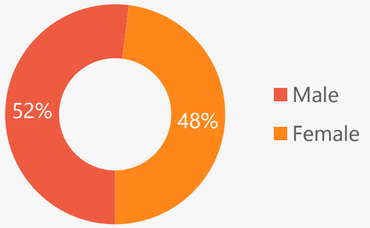


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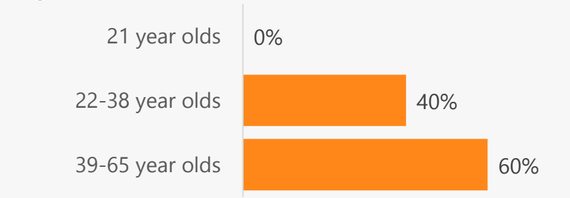


SEGMENT 2 N=50

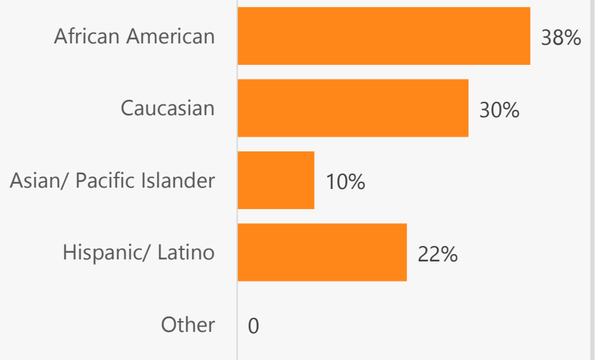
Gender



Age

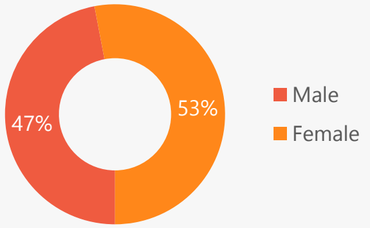


Ethnicity

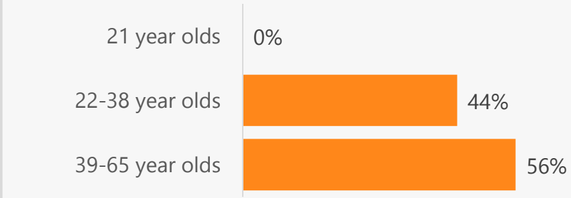


SEGMENT 3 N=45

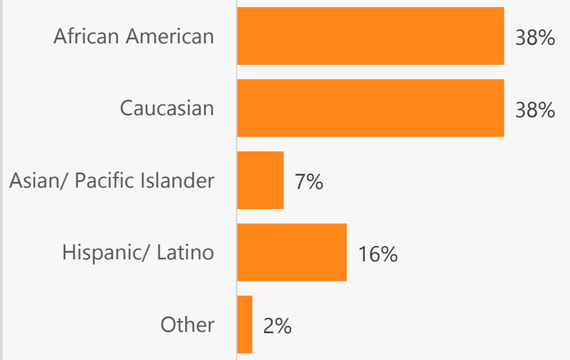
Gender



Age



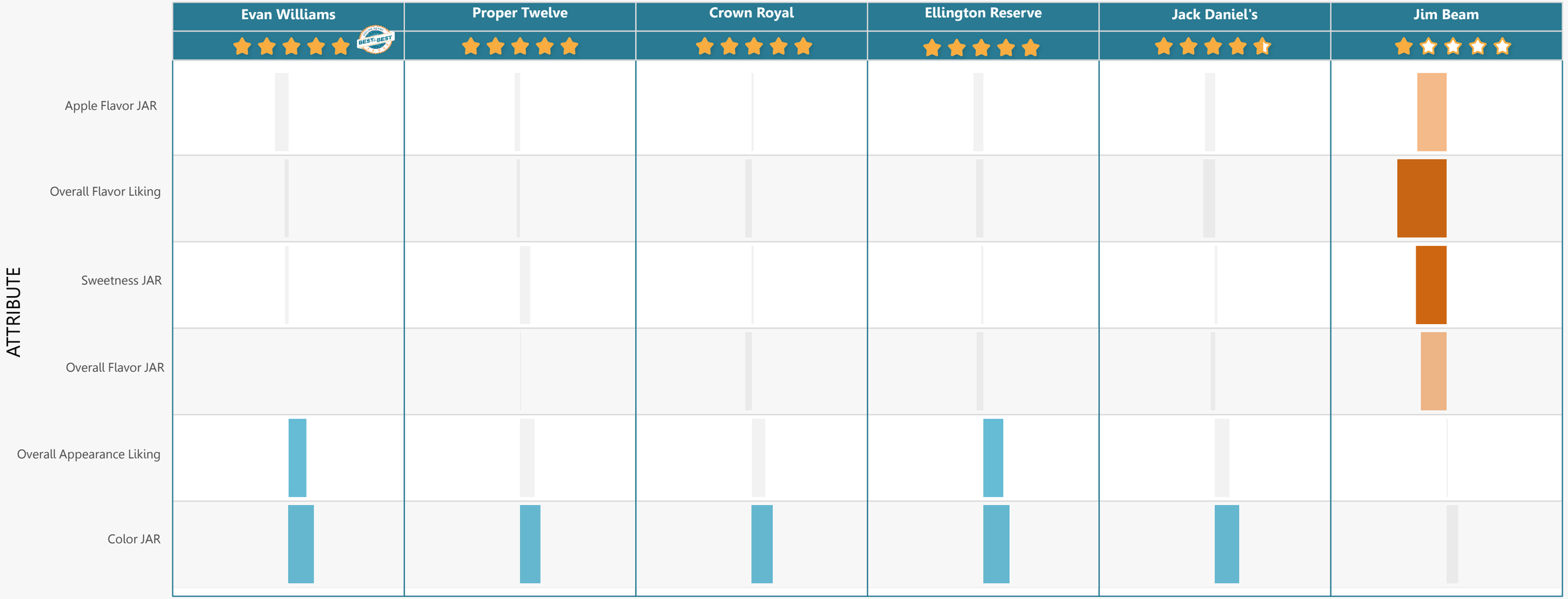
Ethnicity



CURION SCORE™

curion

Jim Beam receives a lower Curion Score™ mainly due to low flavor liking and the sweetness diagnostics, which is split across consumers indicating an imbalanced flavor.



N=158

SUPPORTING RESULTS

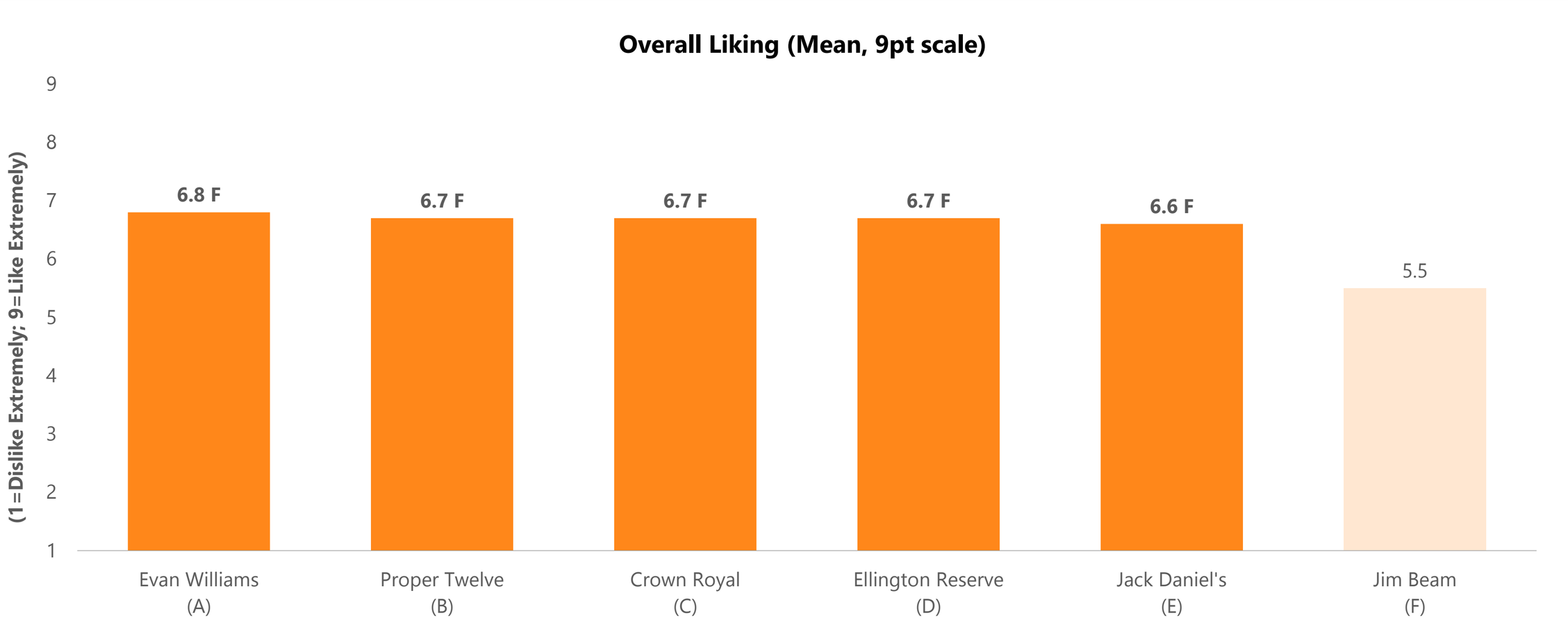
curion

Evan Williams receives the highest ranking across all samples and Jim Beam receives the lowest.

	 Evan Williams (A)	 Proper Twelve (B)	 Crown Royal (C)	 Ellington Reserve (D)	 Jack Daniel's (E)	 Jim Beam (F)
Ranked 1st	**27% BCDEF**	16%	14%	12%	16%	14%
Ranked 2nd	18% F	15%	20% F	23% bEF	14%	10%
Ranked 3rd	11%	19% A	23% AD	14%	17%	16%
Ranked 4th	15%	18%	12%	17%	23% aCf	15%
Ranked 5th	13%	17%	20% a	17%	16%	18%
Ranked 6th	16%	14%	12%	17%	14%	**27% ABCDE**
Rank Sum *(lower the better)*	500	547	537	562	552	620
Mean Rank *(lower the better)*	**3.2 F**	3.5	3.4	3.6	3.5	3.9

95% Significance denoted by uppercase ; 90% Significance denoted by lowercase -- N=158

Consumers like all apple flavored whiskey samples significantly more than Jim Beam.



95% Significance denoted by uppercase ; 90% Significance denoted by lowercase -- N=158

PURCHASE CHANNEL

curion

Consumers primarily purchase flavored whiskey from an independent or specialty liquor store, or at a bar/restaurant.



Location Purchase Flavored Whiskey (%)



Q405: Where do you typically purchase flavored whiskey?
BASE: Total Sample (n=300)

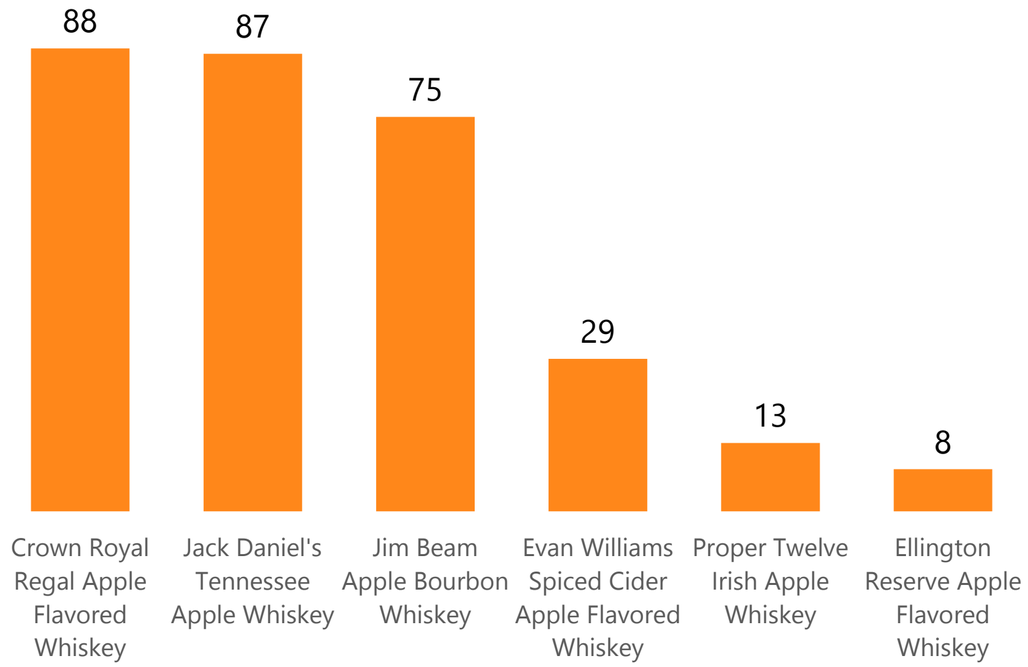
Seeing flavored whiskey on shelf or via recommendations are the main sources of discovery.



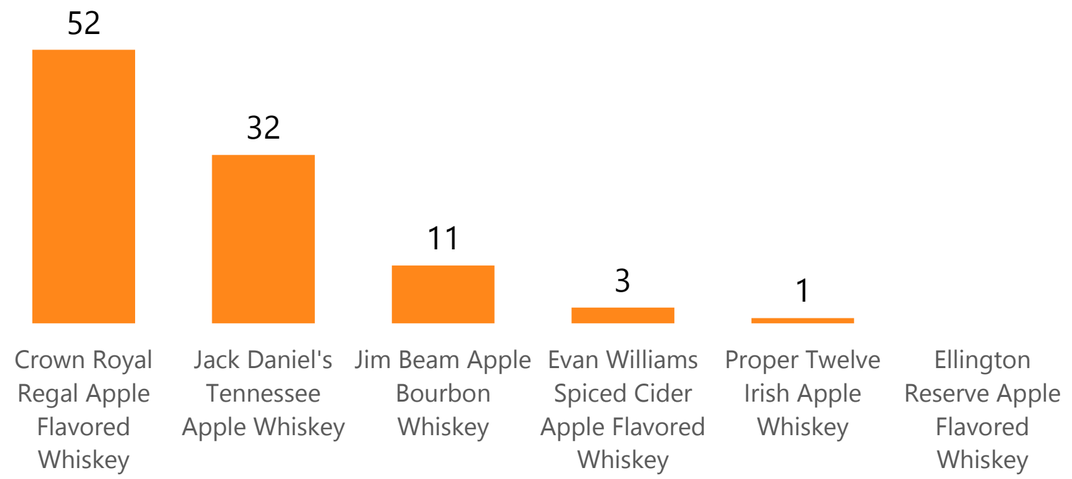
Q410: How do you typically discover new flavored whiskeys?
BASE: Total Sample (n=300)

Crown Royal Regal Apple flavored whiskey is the most consumed and preferred brand of apple flavored whiskey.

Apple Flavored Whiskeys Consumed (%)

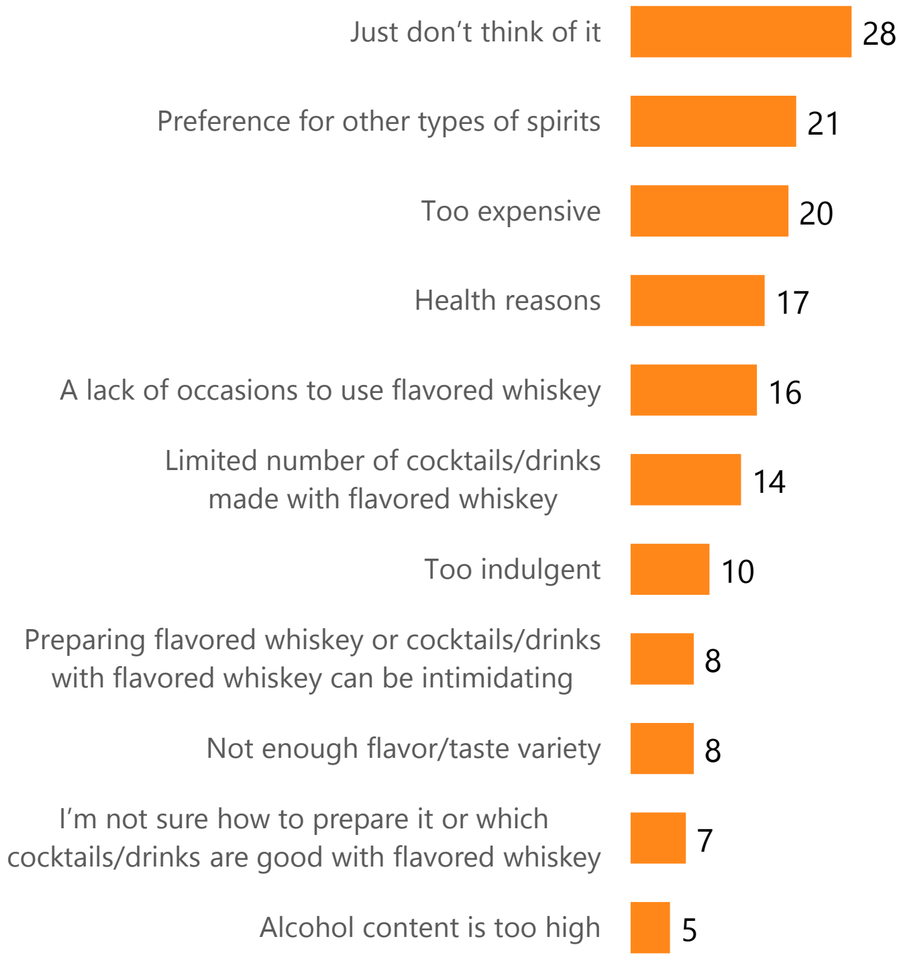


Most Preferred Apple Flavored Whiskey (%)



Q415: Which of the following apple flavored whiskeys have you consumed?
BASE: Consumers who have tried apple-flavored whiskey (n=242)
Q420: Which apple flavored whiskey do you like the best?
BASE: Consumers who have tried at least one qualifying brand of apple-flavored whiskey (n=242)

Barriers To Drinking Flavored Whiskey More Often (%)



Top barriers to drinking flavored whiskey include not thinking of it, preference for other spirits, and cost.

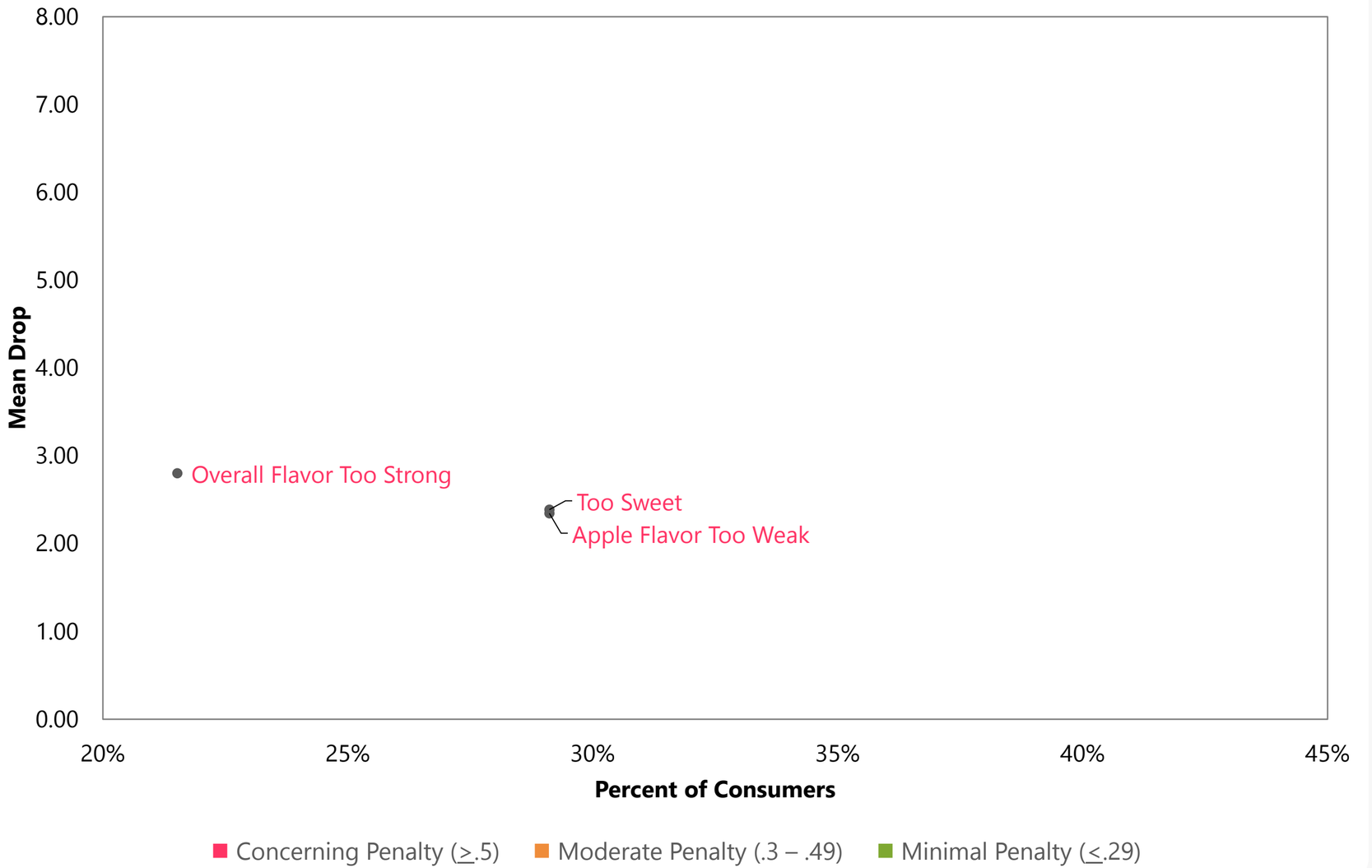


Q425: Why don't you drink flavored whiskey more often?
BASE: Total Sample (n=300)

PENALTY ANALYSIS

curion

EVAN WILLIAMS



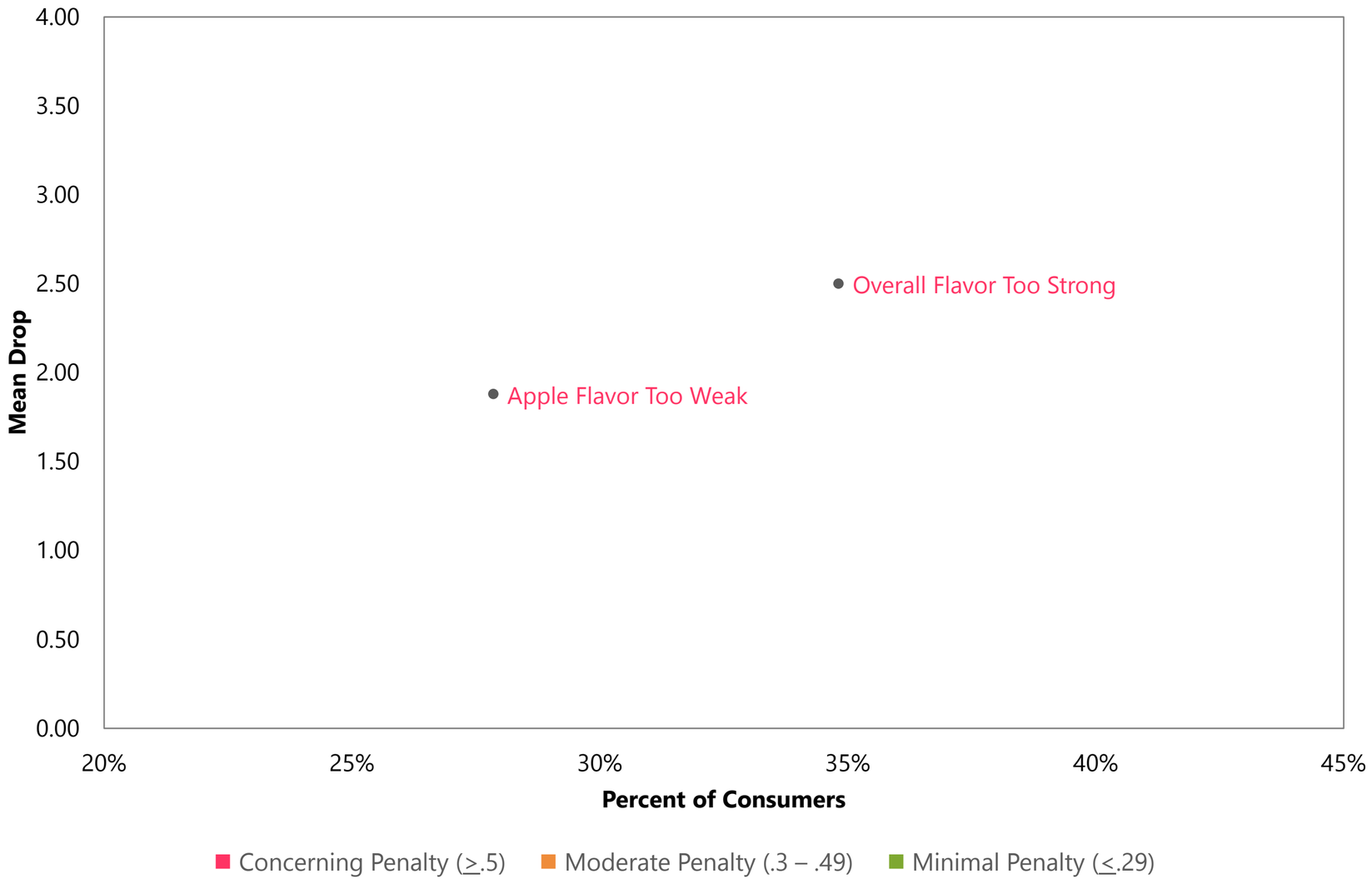
N=158



Concerning Penalty	Weighted Score
Too Sweet	0.69
Apple Flavor Too Weak	0.68
Overall Flavor Too Strong	0.60

Moderate Penalty	Weighted Score
None	n/a

PROPER TWELVE



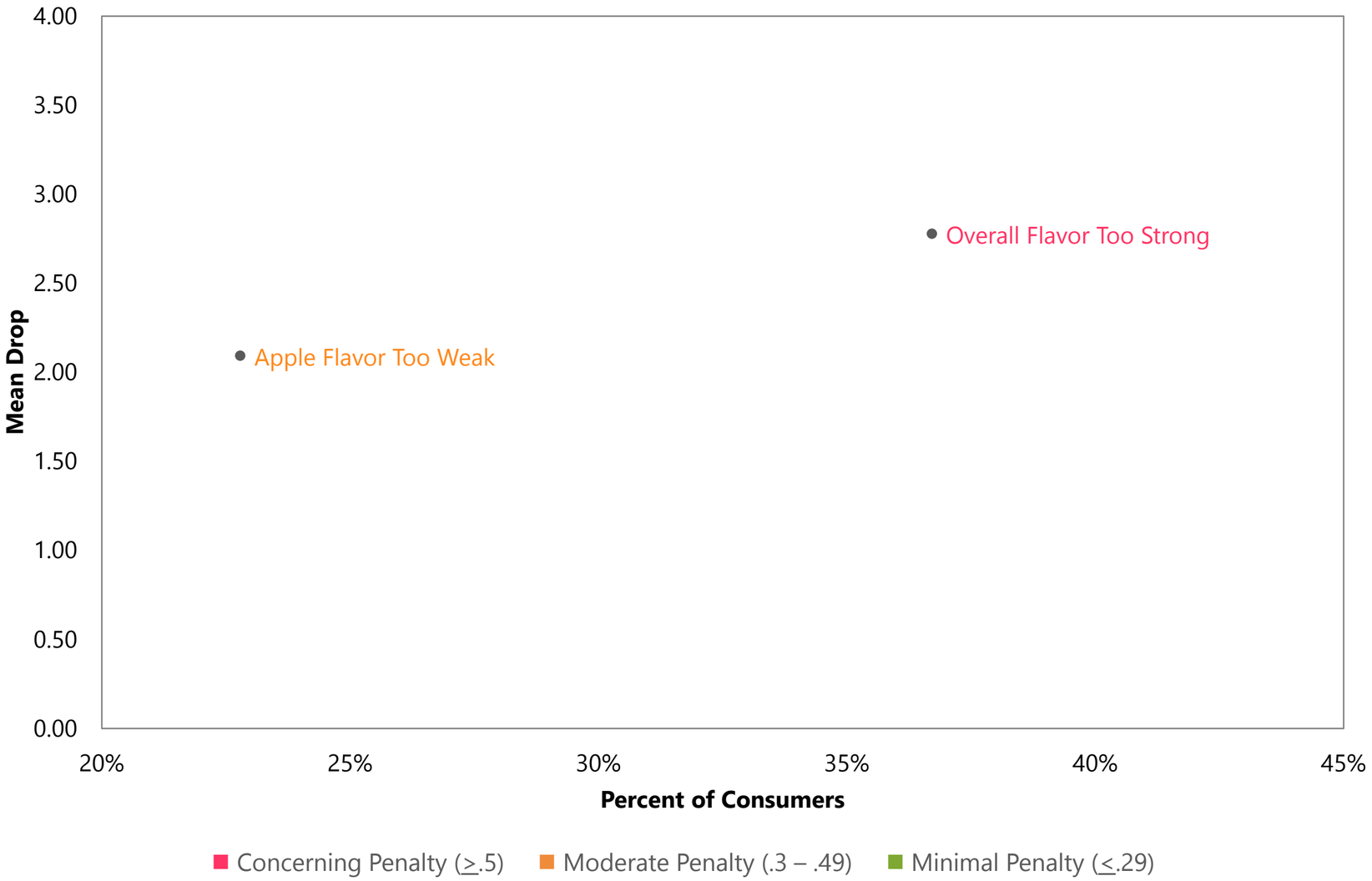


Concerning Penalty	Weighted Score
Overall Flavor Too Strong	0.87
Apple Flavor Too Weak	0.52

Moderate Penalty	Weighted Score
None	n/a

N=158

CROWN ROYAL



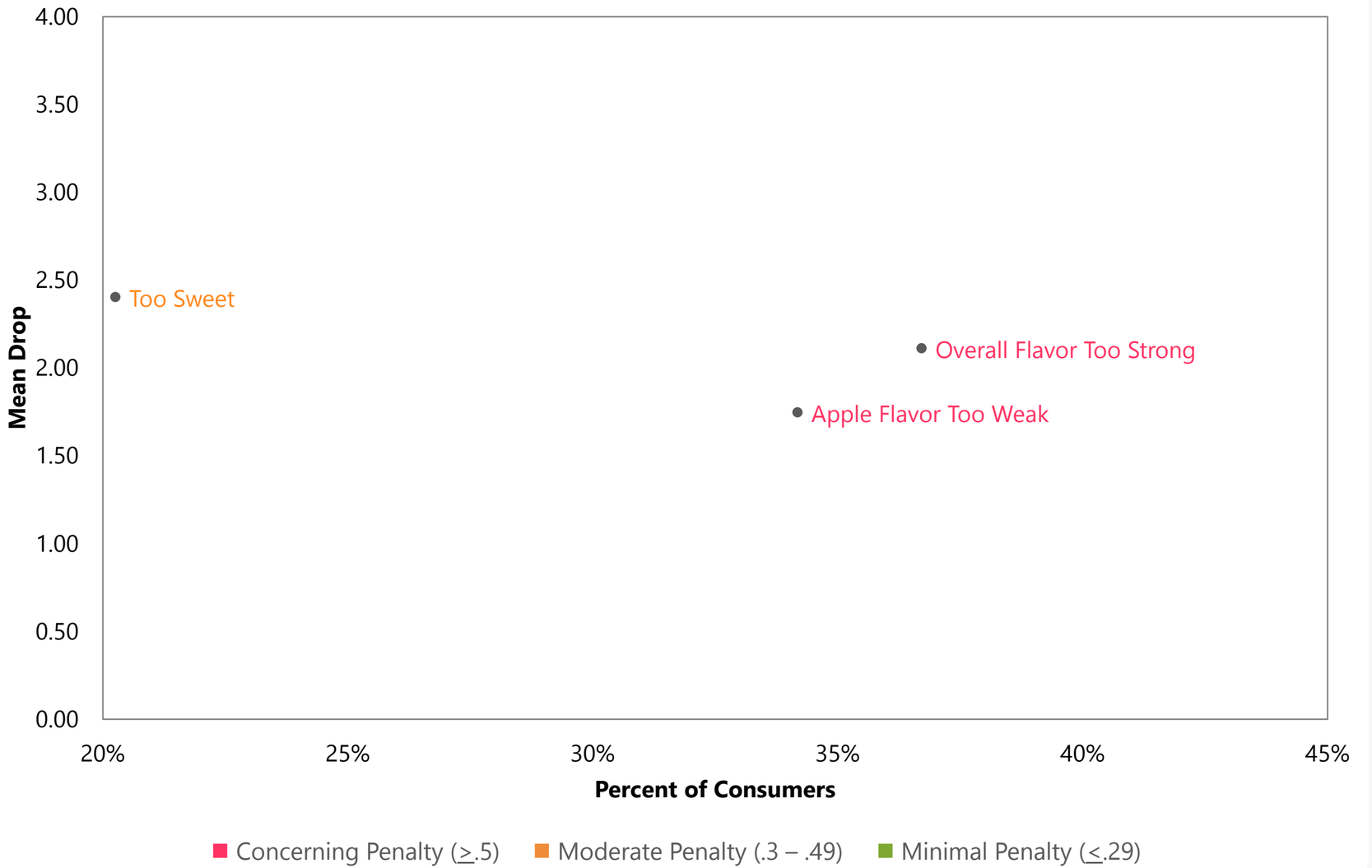
N=158



Concerning Penalty	Weighted Score
Overall Flavor Too Strong	1.02

Moderate Penalty	Weighted Score
Apple Flavor Too Weak	0.48

ELLINGTON RESERVE



N=158



Concerning Penalty	Weighted Score
Overall Flavor Too Strong	0.78
Apple Flavor Too Weak	0.60

Moderate Penalty	Weighted Score
Too Sweet	0.49

JACK DANIEL'S



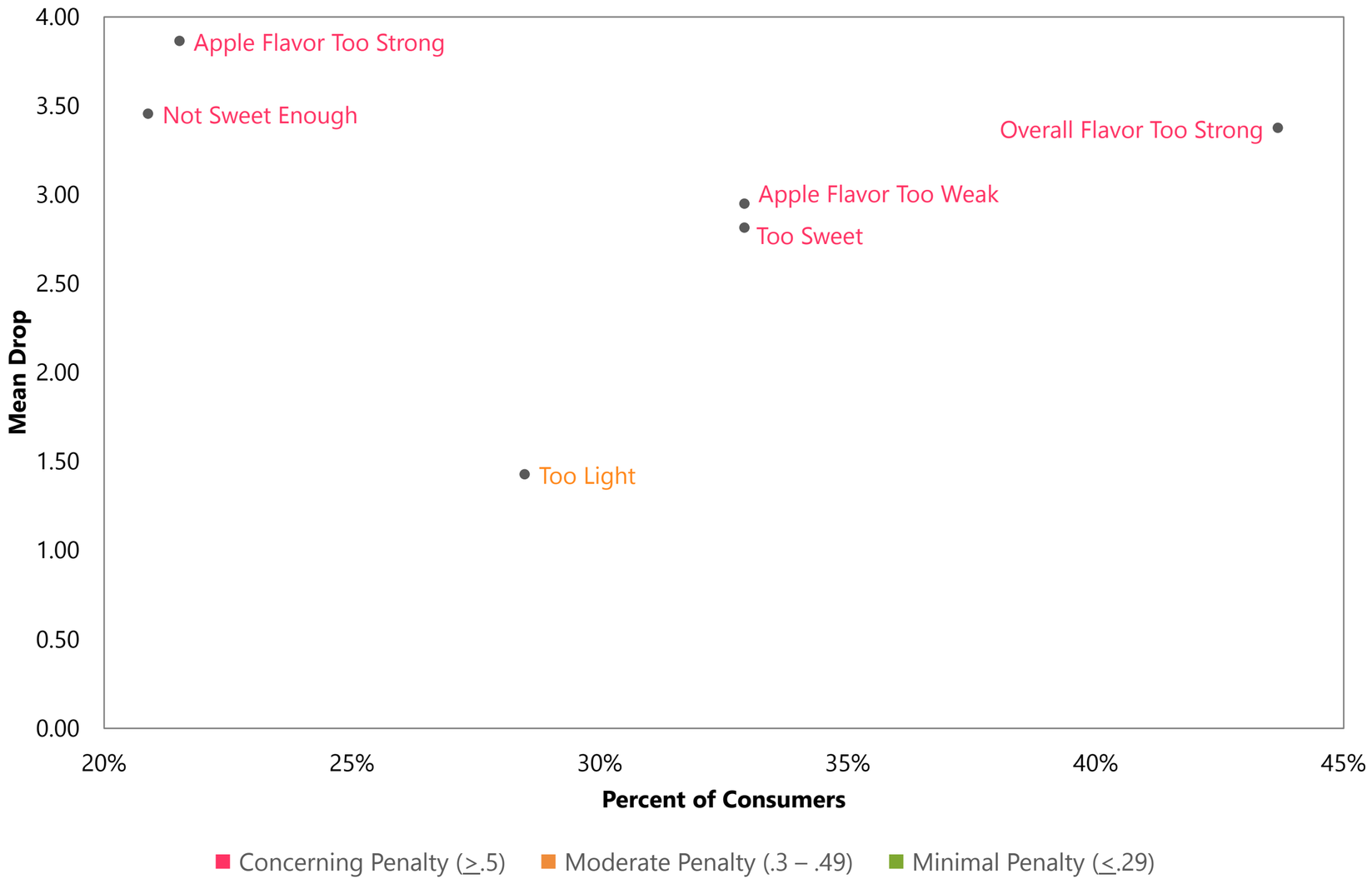
N=158



Concerning Penalty	Weighted Score
Overall Flavor Too Strong	0.88
Apple Flavor Too Weak	0.74
Not Sweet Enough	0.56

Moderate Penalty	Weighted Score
None	n/a

JIM BEAM





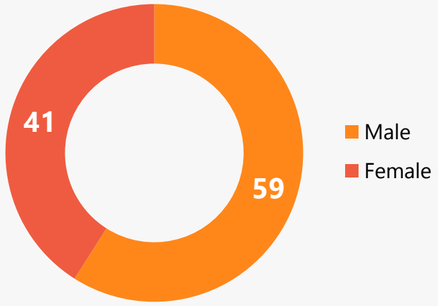
Concerning Penalty	Weighted Score
Overall Flavor Too Strong	1.47
Apple Flavor Too Weak	0.97
Too Sweet	0.93
Apple Flavor Too Strong	0.83
Not Sweet Enough	0.72

Moderate Penalty	Weighted Score
Too Light	0.41

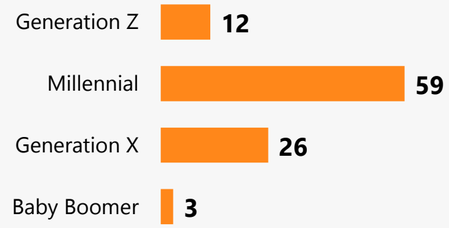
N=158

APPENDIX

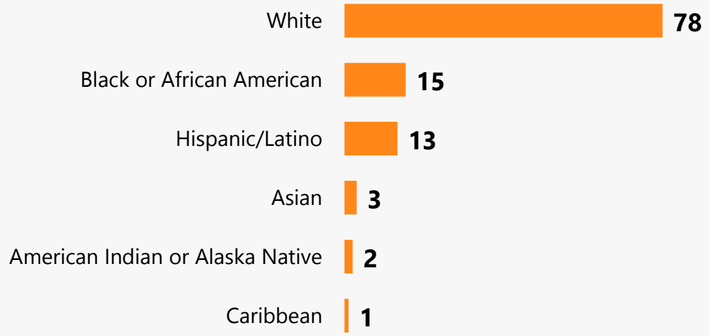
Gender (%)



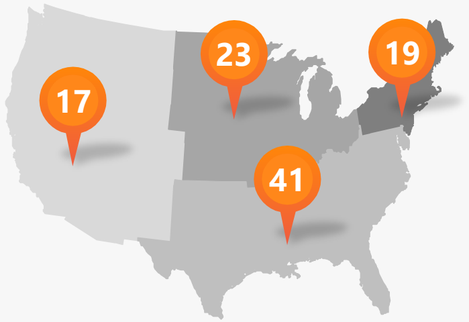
Generation (%)



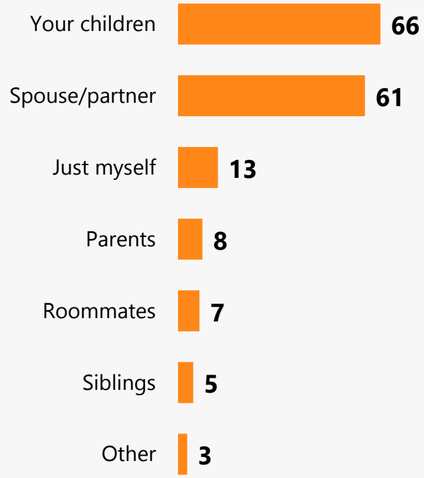
Ethnicity (%)



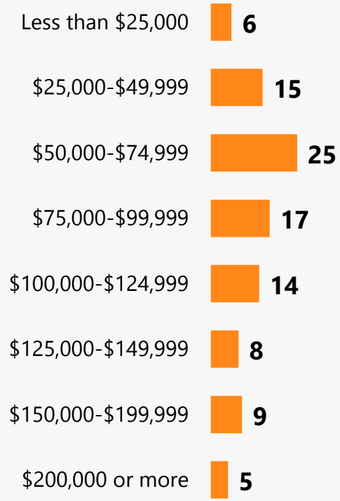
Region (%)



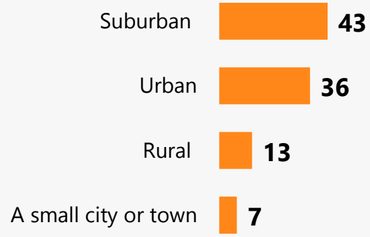
HH Composition (%)



HH Income (%)



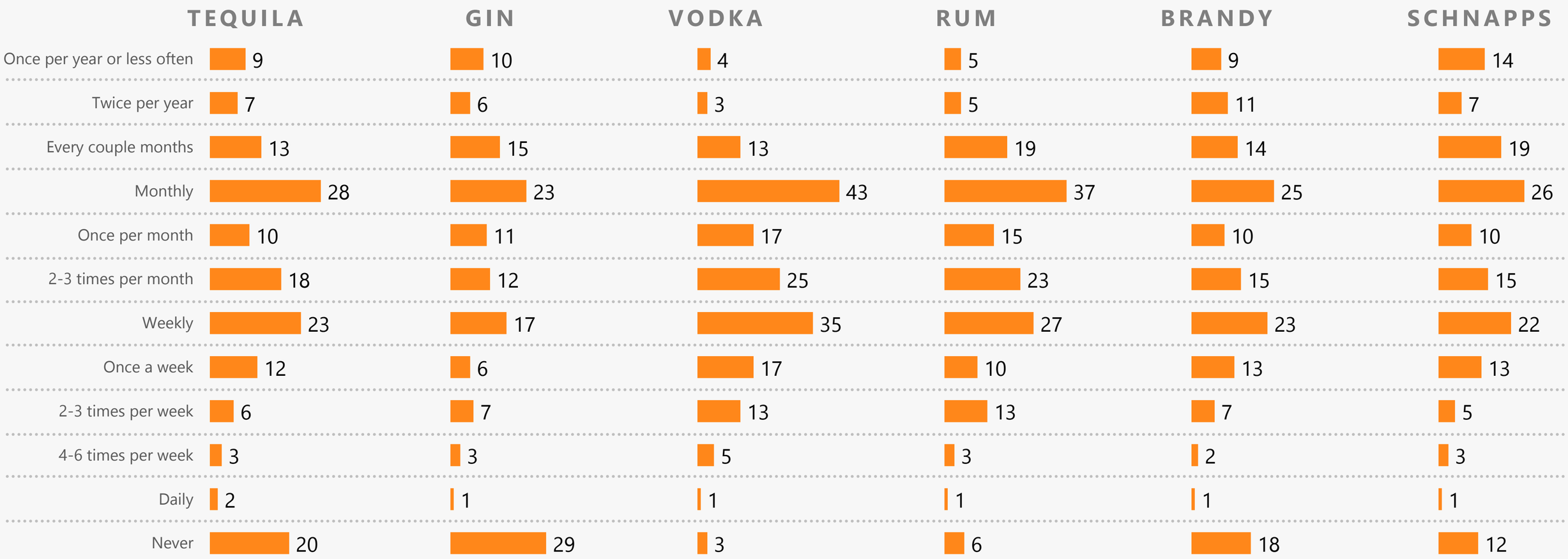
Area Live (%)



BASE: Total Sample (n=300)

Flavored whiskey drinkers most often choose flavored vodka and rum when drinking other flavored spirits.

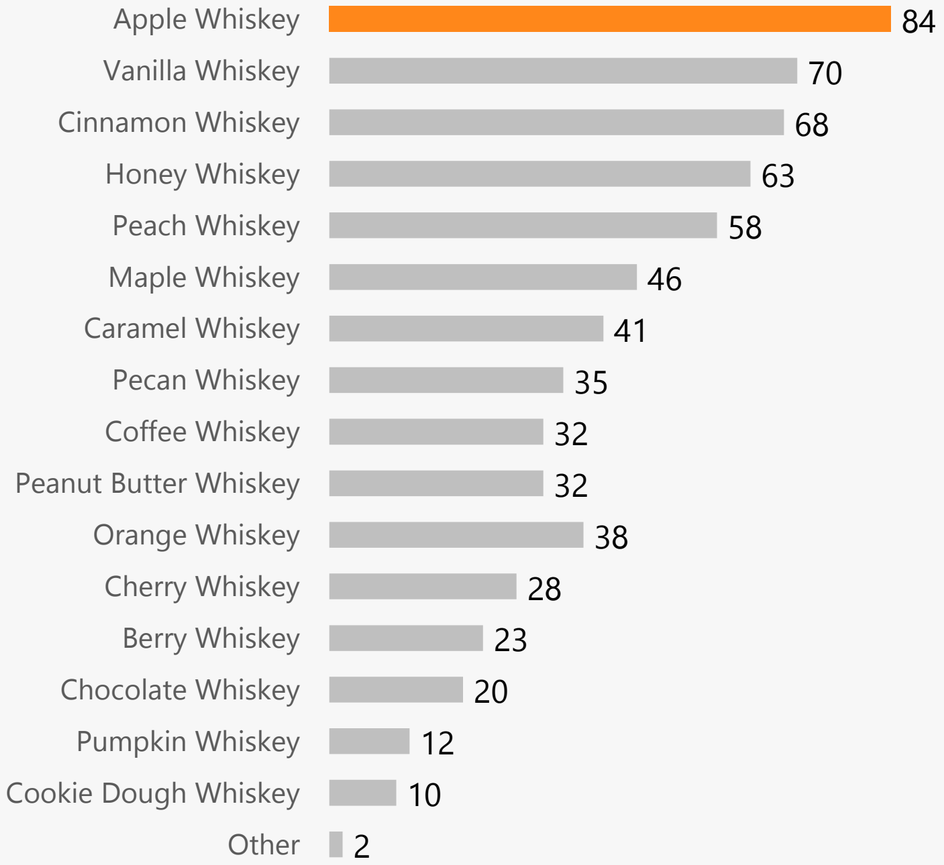
Consumption of Other Flavored Spirits (%)



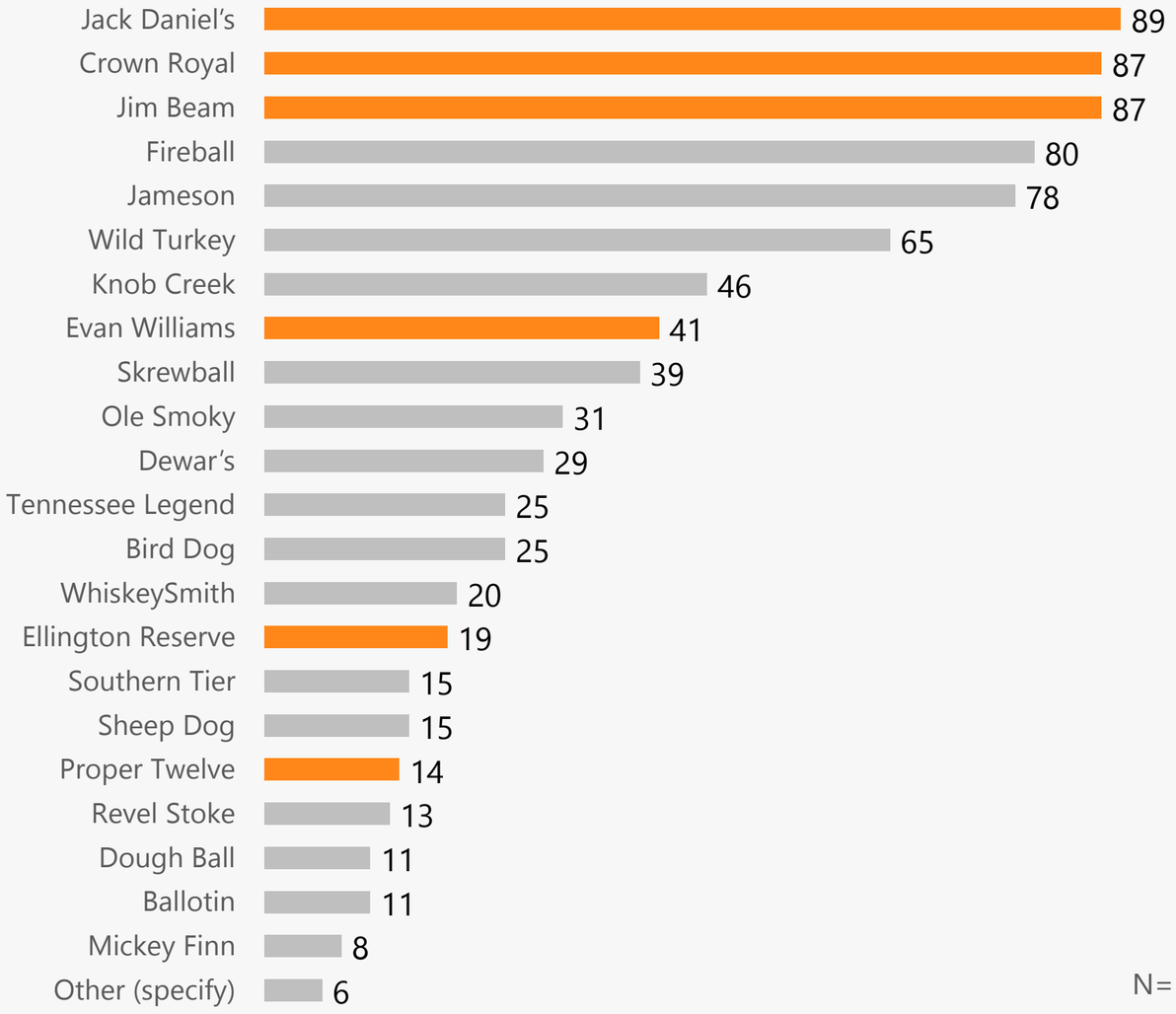
Q430: How often do you typically consume other types of flavored spirits?
BASE: Total Sample (n=300)

The majority of consumers have consumed apple flavored whiskey and consumed Jack Daniel's, Crown Royal, and Jim Beam Flavored Whiskeys.

Types of Flavored Whiskey Ever Consumed (%)



Brands of Flavored Whiskey Ever Consumed (%)



N=158

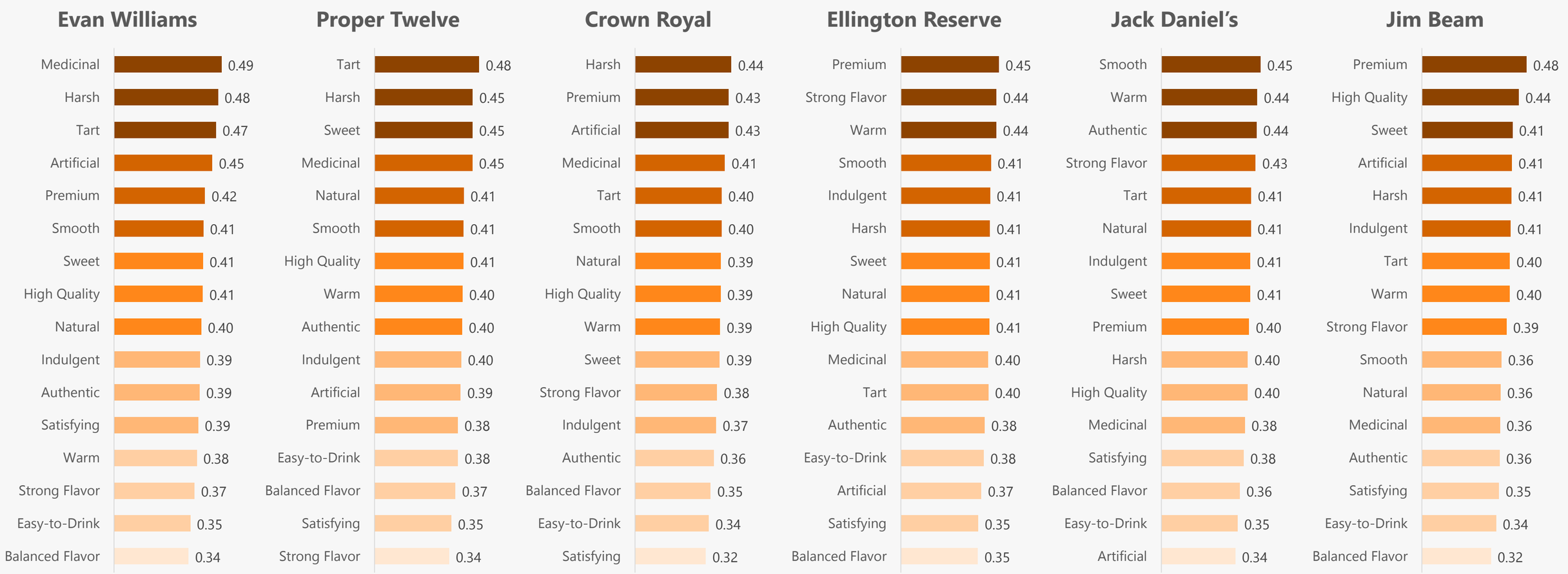
All apple flavored whiskeys are similarly liked, except for Jim Beam, which is least; however, Evan Williams is preferred over the other preferred over others.

	 Evan Williams (A)	 Proper Twelve (B)	 Crown Royal (C)	 Ellington Reserve (D)	 Jack Daniel's (E)	 Jim Beam (F)
Overall Liking (Mean, 9pt scale)	**6.8 F**	**6.7 F**	**6.7 F**	**6.7 F**	**6.6 F**	5.5
Preference Ranking Ranked First	**27% BCDEF**	16%	14%	12%	16%	14%
Concerning Penalties (Weight ≥ .5)	Too Sweet; Apple Flavor Too Weak; Overall Flavor Too Strong	Overall Flavor Too Strong; Apple Flavor Too Weak	Overall Flavor Too Strong	Overall Flavor Too Strong; Apple Flavor Too Weak	Overall Flavor Too Strong; Apple Flavor Too Weak; Not Sweet Enough	Overall Flavor Too Strong; Apple Flavor Too Weak; Too Sweet; Apple Flavor Too Strong; Not Sweet Enough
Concerning Penalties (Weight .3 - .49)	None	None	Apple Flavor Too Weak	Too Sweet	None	Too Light

95% Significance denoted by uppercase ; 90% Significance denoted by lowercase -- N=158

During implicit testing, the quicker consumers react, the higher the association of that attribute to the product.

Note: this does not take into account the number of consumers who associate an attribute to a product, only the speed at which those selected 'Yes.' These values should not be used on their own, but only with the number of consumers.



High Association | Medium Association | Low Association N=158

CONTACT US

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