



TABASCO



150 YEARS TRADITION IN CRAFTING
PROUD U.S. HOT SAUCES



Prepared for:

Lee Susan, Chief Marketing Officer

Trey Maxham, Associate Dean for Graduate Programs

Prepared by:

Oretha Domfeh | Lena Lin | Aftab Thobani | Justin Yang



Oretha Domfeh



Lena Lin



Aftab Thobani



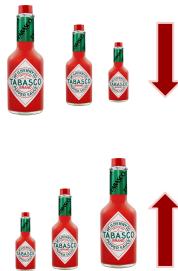
Justin Yang

Meet the Team

AGENDA



Industry at a glance



- 6.5% decrease in profit margin
- \$1.5b increase in revenue in 2019
- 3.4% annual growth for the past 5 years
- 6.8% increase in # of businesses

1. Hot sauce, like most other condiments, is purchased by both food service providers and supermarkets for resale to the final consumer.
2. In addition to drawing inspiration from foreign flavor profiles, industry operators also ship products internationally and compete with foreign producers for the US market.
3. As internal competition and acquisition activity increased during the period, the landscape within the Hot Sauce Production industry has shifted.

Major Players (Market Share)



12.5%



17.4%



10.4%

<https://my-ibisworld-com.proxy01.its.virginia.edu/us/en/industry/od4627/major-companies#9202>

Company Overview

Problem & Opportunity

Research Analysis

Recommendations

Risks & Challenges

About Tabasco

- Tabasco brand products are made by McIlhenny Company, founded by Edmund McIlhenny in 1868 on Avery Island, Louisiana
- Today, nearly 150 years later, Tabasco sauce, the basic recipe, the process by which it's made, and the ingredients remain virtually unchanged. Now the aging process for the mash is longer – up to three years in white oak barrels – and the vinegar is high-quality distilled vinegar.
- The company is still family-owned and -operated on that very same island



Company Overview

Problem & Opportunity

Research Analysis

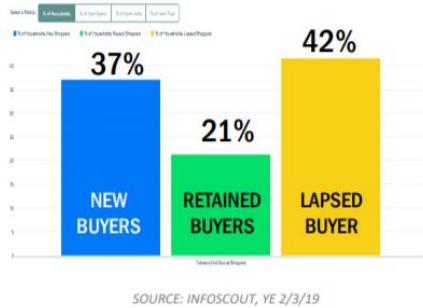
Recommendations

Risks & Challenges

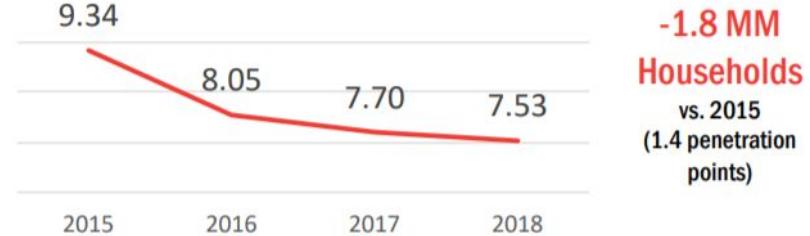
IN 2018, TABASCO lost more buyers than we brought in, with almost half of our buyers leaving the franchise.

About half of these lapsed buyers went on to buy other hot sauce brands...

Over the past 3 years, TABASCO lost 1.8 million households (1.4 penetration points)...



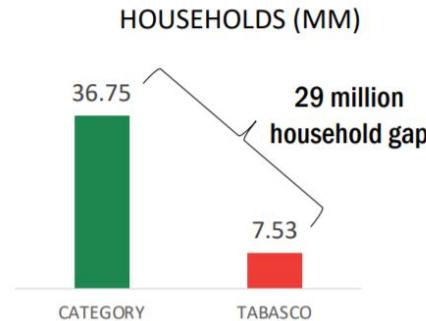
TABASCO HOUSEHOLDS (MM)



Problem: Tabasco is losing more customers over the years to its leading competitors

GAP = 29.3 Million HHs in US buy Hot Sauce & NOT TABASCO

...with a substantial opportunity to bring in Hot Sauce households not currently buying TABASCO.



QUANTIFY OPPORTUNITY

Close GAP by:	Million HHs:	X	AVG TABASCO Buy Rate	=	Opportunity
10%	2.93	X	\$5.22	=	\$15.3 MM
20%	5.86	X	\$5.22	=	\$30.6 MM
30%	8.79	X	\$5.22	=	\$45.9 MM

This leads to an opportunity of strategic household acquisitions

Competitive Landscape - Key Players



- Oldest brand with a large amount of history & authenticity
- Premium brand with high-quality ingredients
- Diverse product selection ensures all flavor and size preferences
- Tabasco has the highest brand awareness, but this isn't necessarily converting to highest use



- Considered an "American-classic"
- Most popular for buffalo flavor variety and have taken claim over being the original buffalo wing sauce
- Aims to be an "all-purpose" sauce with no overpowering flavors



- Mass appeal hot-sauce aimed at being used for everything
- Not focused on high-quality ingredients or price premium
- Highest salt-profile, aimed at adding flavor to bland foods



- Focused on "flavor and balance" opposed to overpowering heat
- Aims to capture value-seeking consumers
- Provides heat to foods, mainly used as a mild condiment



- Authentic ethnic flavorful appeal
- Conveys brand story of being manufactured and rooted in Mexico
- Aims to convey premium quality, artisan-ship, and authenticity
- Mild heat-level with a focus on delivering flavor to foods

Company Overview

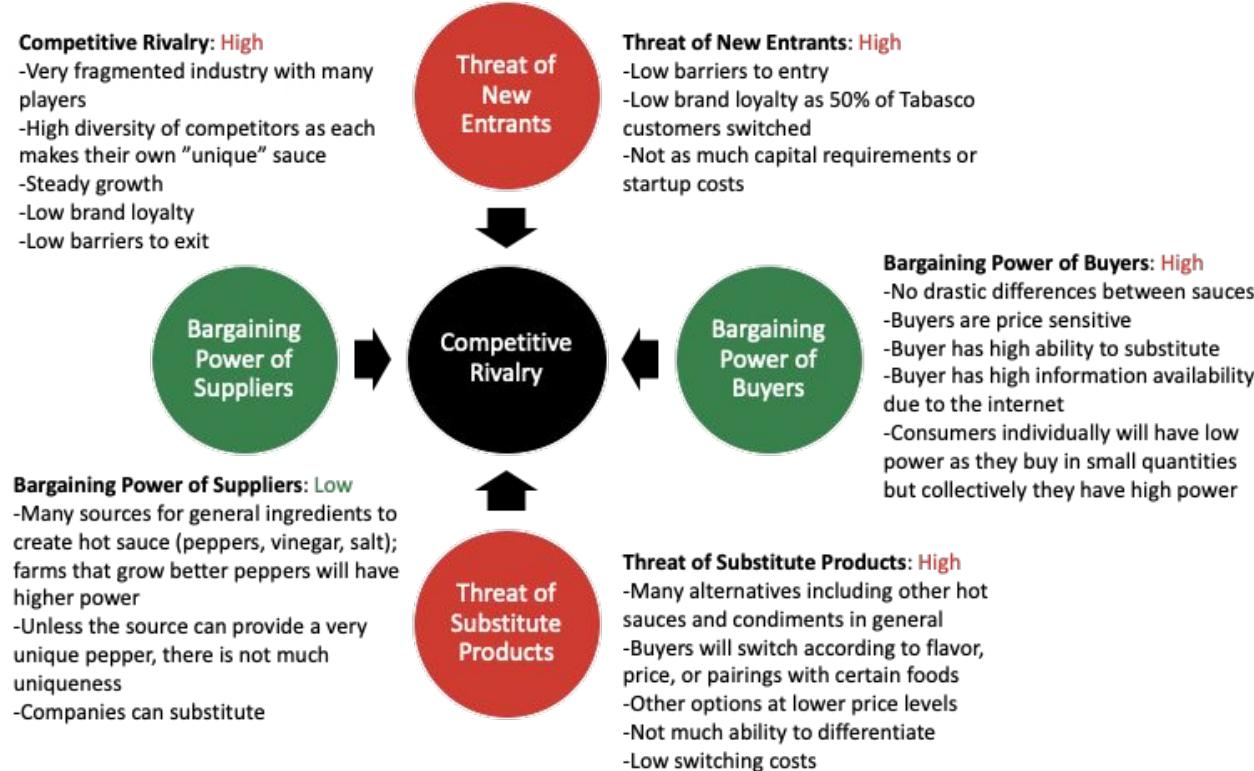
Problem & Opportunity

Research Analysis

Recommendations

Risks & Challenges

Competitive Landscape - Porter's Five Forces



Competitive Landscape - SWOT Analysis

Tabasco SWOT Analysis

Strengths

- High brand awareness among customers
- Access to many distribution channels and networks even internationally
- Long product shelf life reducing turnover
- Versatility of the product for various uses
- Most of the ingredients are proprietary
- Longevity of the brand

Weaknesses

- Limited financial resources as a private company
- Dependence on Avery Island for production of seed stock
- Minimal advertising presence
- Brand perception of spicy products which alienate customers who prefer mild flavors

Opportunities

- Capitalize on B2B partnerships to market to new customers
- Expand into other product lines
- Leverage Tabasco's popularity as an ingredient to advertise in recipes
- Engage in more philanthropic causes
- Look to build more production facilities

Threats

- Low barriers to entry in the hot sauce industry which allow for many other competitors to form their own brands
- Extensive aging process of peppers can limit response to changes in demand
- Competitors may have financial backing to spend more on advertising
- Avery Island can be subject to natural disasters which could affect production

Company Overview

Problem & Opportunity

Research Analysis

Recommendations

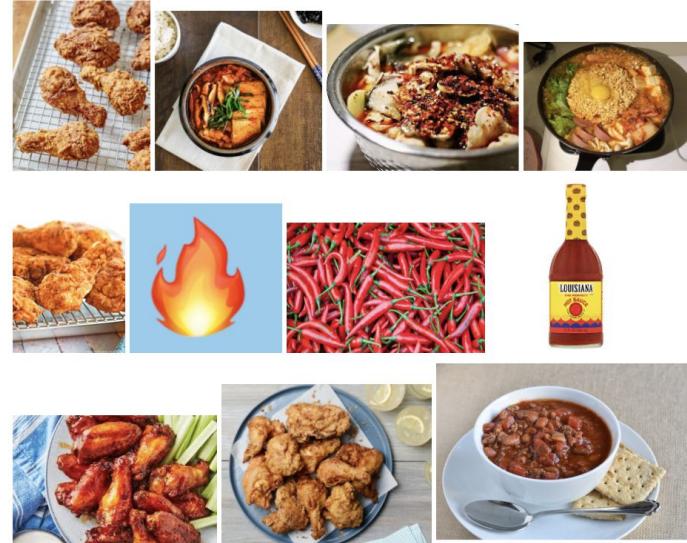
Risks & Challenges

ZMET Takeaways

"I think Sriracha is the closest competitor to Tabasco and I actually use Sriracha more than Tabasco."

"Tabasco reminds me of Mexican products or Mexican dishes such as Quesadilla (participant on why they called an image of a Mexican flag.)"

"I included a picture of Chipotle as that is where I was first introduced to Tobasco. I mostly use Tabasco in my chipotle bowls."



shutterstock.com • 727047892

UserTesting Takeaways

01

Test 1: Tabasco's digital product discovery journey

- Users had positive experience exploring the website
- Room for additional features Tabasco can consider to further personalize the customer journey
- inconsistencies in website functionality

02

Test 2: The hot sauce industry's digital competitive landscape

- Revamp their social media
- Tabasco is lacking in humanization and humor
- Users generally liked Frank's because of its high-quality photography and humor.

03

Test 3: Tabasco's product use and applications

- Customers see Tabasco as a condiment.
- Users appreciate the simpler recipes and the blog posts

Company Overview

Problem & Opportunity

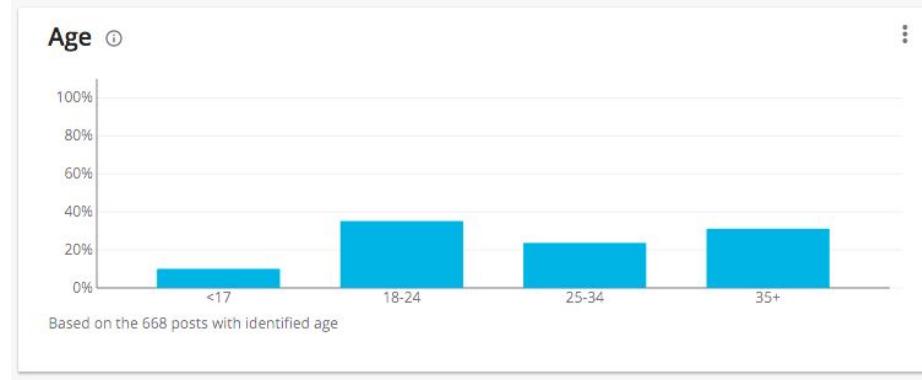
Research Analysis

Recommendations

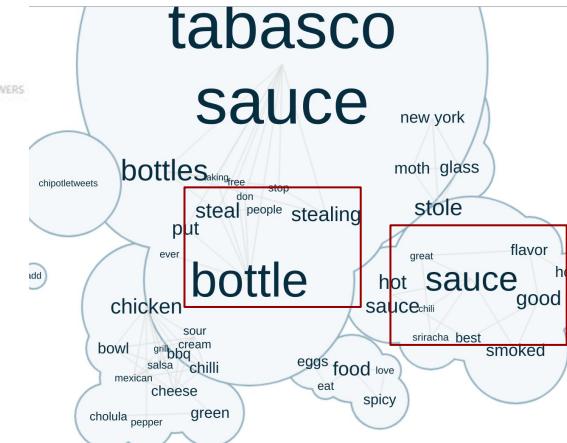
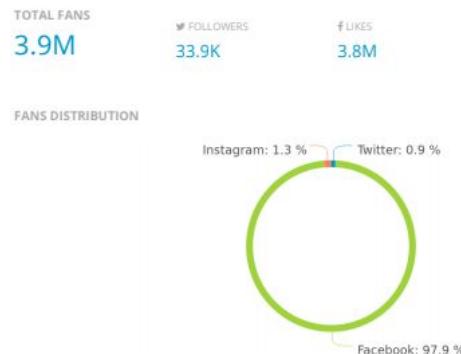
Risks & Challenges

Social Analytics

- Tabasco has positive online consumer sentiment and targets older audiences
- Chipotle is Tabasco's greatest influencer and a great opportunity
- Younger social medias present an opportunity to increase millennial attraction



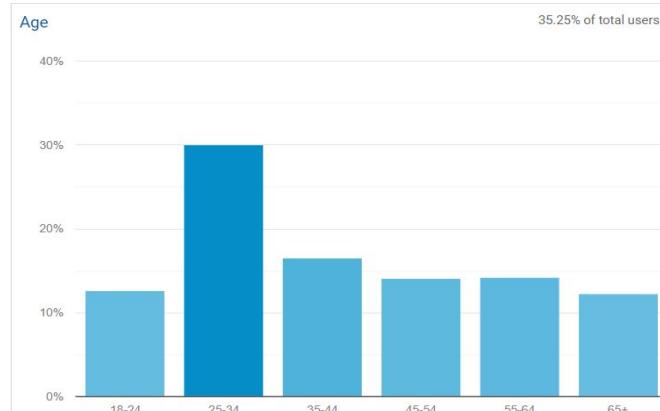
How big is TABASCO® Brand's audience?



Digital Analytics

- Typical Tabasco web visitors are millennials age 25-34 years old
- Majority of Tabasco site visitors are from Organic Search channel
- Almost all Tabasco visitors fail to utilize site search tool
- Majority of web visitors use mobile devices

Search Term	Total Unique Searches	% Total Unique Searches
1. DIP	64	11.02%
2. bloody mary	55	9.47%
3. Chicken	14	2.41%



Sessions	Pageviews
286,051 % of Total: 100.00% (286,051)	530,698 % of Total: 100.00% (530,698)

Session Duration	Sessions	Pageviews
0-10 seconds	203,299	213,766
11-30 seconds	17,275	38,494
31-60 seconds	15,850	42,873
61-180 seconds	23,495	88,455
181-600 seconds	15,877	82,627
601-1800 seconds	8,021	45,958
1801+ seconds	2,234	18,525

1

Expand current and pursue new restaurant partnerships that strengthen the brand

2

Grow social media presence on various platforms through a personable voice

3

Improve website checkout functionality and mobile presence for greater conversion

RECOMMENDATIONS



Expand current and pursue new restaurant relationships that strengthen the brand

RECOMMENDATION 1

Capitalize on restaurant relations that strengthen the brand



Leverage Chipotle's brand for co-marketing initiatives and campaigns online & In store



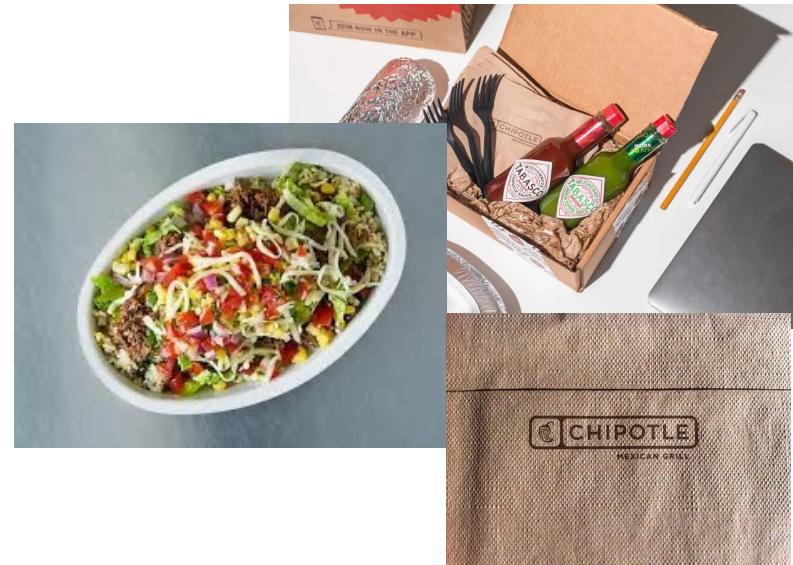
Find other restaurants in the premium fast-casual space that can help increase household penetration and maintain the clean, classic image

Customers heavily associate Tabasco with Chipotle

*“Chipotle is where I was first introduced to Tabasco...
I mostly use Tabasco in my chipotle bowls.”*

*“I prefer the smoked chipotle flavor from Tabasco
because it adds a unique flavor profile to the bowls at
Chipotle.”*

*“When I think of Tabasco, I think of Mexican food,
because of Chipotle”*



*Slide contains select examples of participant selected images and quotes when asked to describe “Tabasco” during ZMET Interviews

Chipotle is one of Tabasco's largest social media influencers

Age ⓘ

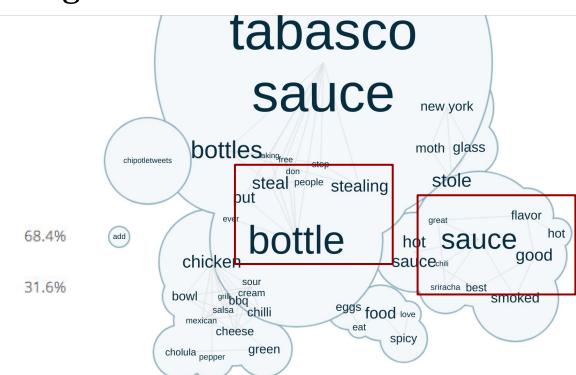
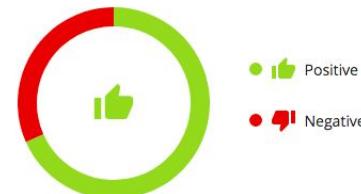


Age ⓘ



The pairing of Tabasco & Chipotle is discussed mainly by younger fans

- Content including both “Chipotle” and “Tabasco” has overwhelmingly positive sentiment.
- Discussion clusters present marketing opportunities.



Tabasco has an opportunity to lean in to “Taking the bottle”



Skip Reagor @SkipToMyView · 21h

Not being allowed to go into the #Chipotle 🍔 to pick up my order makes it really hard to **steal** their Tabasco.



br o se 🇺🇸 @champagnemamiib · May 16, 2018

So I do this thing where I **steal** a bottle of Chipotle's **tabasco** when I'm out and I was about to do it (I'm very sneaky about this) and this guy and I both did it at the same time.

He laughs and goes: "If you don't tell I won't.."

..deal



14



508



Take the bottle Campaign: Free small bottles to Chipotle customers as a partnership initiative w/ Chipotle

- + Promotes trial of product
- + Helps the brand portray more of a personality



THEY MADE ME DO IT @CMFC99 · May 27, 2012

It's surprisingly easy to **steal** Tabasco hot sauce bottles from Chipotle restaurants.



Chipotle Delivers ✅ @ChipotleTweets · Feb 15, 2016

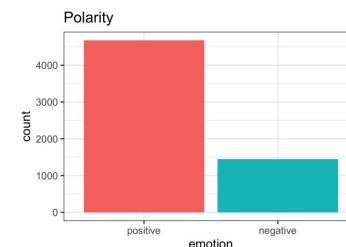
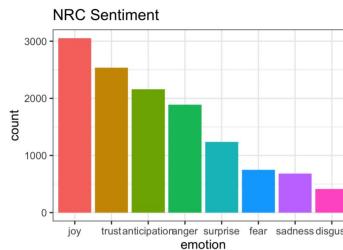
Replying to @lamSantwon

@lamSantwon Why you gotta **steal** Tabasco? This is why we can't have nice things. -Shane



Gabriel-Iglesias ✅ @fluffyguy · Apr 25, 2015

Can u guys start making packets or put a pump 4 the @ChipotleTweets **Tabasco**. People always **steal** the bottles. 😩



Higher count of positive emotions towards hot-sauces from product review analysis implies that more people that try hot-sauce like it than those that don't.

Tabasco should pursue similar relations with other restaurants

- ❖ ZMET Interviews highlighted strong sauce and restaurant associations
 - Popeye's → Louisiana
 - Buffalo Wild Wings → "Hot" sauces in general

86%

love the taste of
TABASCO® Sauce¹

77%

agree TABASCO® Sauce
makes any dish better¹

- ❖ Getting restaurants to be champions of Tabasco would include:



Aligned
positioning as a
premium brand



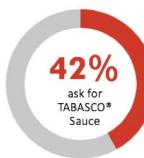
Tabasco branded
product releases



Social Media
influencing

68 %

are more likely
to order menu items
that call out
TABASCO® BRAND





Grow Social Media Presence on Various Platforms Through a Personable Voice

RECOMMENDATION 2



Focus on mobile heavy social media apps among Millennials and Gen Z groups (i.e. Instagram and Twitter)



Create a brand persona that promotes a clearer message of Tabasco's brand mission



Emphasize Tabasco as a U.S. brand hot sauce with 150 years tradition of hand-crafting the flavors



Invest in social media persona to generate topics and interactions among fans

TABASCO NEEDS TO GROW INTERACTIONS ON YOUNGER PLATFORMS

Although Tabasco is leading competitors in sheer number of fans, it's trailing significantly in number of engagements per fan.

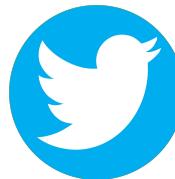
	Tabasco	Frank's Red Hot	Cholula	Tapatio	Texas Pete
Total Engagements last year:	134003	330715	60800	301800	28700
Total fan base:	3908696	1195939	245639	447415	189671
Engagements per fan:	0.03428330062	0.2765316626	0.2475176987	0.674541533	0.1513146448

Total Engagements Last Year = Facebook likes, comments and shares + Instagram Likes and comments + Twitter Retweets, likes and replies (between April 4th 2019, and April 4th 2020)

Total Fan Base = Facebook Fans + Instagram Followers + Twitter Followers (as of April 4th 2020)

Engagements per Fan = (Total Engagements Last Year / Total Fan Base)

TABASCO NEEDS TO GROW INTERACTIONS ON YOUNGER PLATFORMS



- 97% of Tabasco's current fans are on Facebook
- As of 2020, average Facebook users in the United States is 40.5 years old
- Fewer than 10% of Facebook users are 17 or younger but over 65% are 35 or older
- As of 2020, average Twitter users in the United States is 40 years old
- 38% of Twitter users are 18-29 years old
- 80% of Twitter users are affluent millennials
- As of 2020, over 70% of Instagram users in the United States are between 18-44 years old
- 35.1% are 25-34-years old
- 21.7% are 18-24-years old
- As of 2020, 41% of Tik Tok users are 16 to 24 years old
- Roughly 50% is under the age 34
- 90% of the users visit the app more than once a day
- As of 2020, 53% of Snapchat users age 18-24 years old
- 78% of internet users age 18-24 uses Snapchat
- Over 77% of users age 18-29 uses the app more than once a day

[https://smallbusiness.chron.com/breakdown-f
acebook-users-62380.html](https://smallbusiness.chron.com/breakdown-facebook-users-62380.html)

[https://www.omnicoreagency.com/twitter-
statistics/](https://www.omnicoreagency.com/twitter-statistics/)

[https://www.statista.com/statistics/
398166/us-instagram-user-a
ge-distribution/](https://www.statista.com/statistics/398166/us-instagram-user-age-distribution/)

[https://www.omnicoreagency.com/tiktok-
statistics/](https://www.omnicoreagency.com/tiktok-statistics/)

[https://www.omnicoreagency.com/
snapchat-statistics/](https://www.omnicoreagency.com/snapchat-statistics/)

TABASCO SHOULD ADOPT A MORE PERSONABLE VOICE ON ITS SOCIAL MEDIA PAGES

- **Which brand impressed you the most, and why? Which brand impressed you the least, and why?**

Frank's had the best website by far that really impressed me. My least favorite was Tapatio. It seemed like it was trying to sell clothing instead of a sauce.

- **Which brand had the most cohesion/integration between their social media (Facebook & Instagram) and eCommerce (their website)? Why?**

Franks Red Hot Sauce because it is the most humanized one meaning it has pictures that relate the most to customers like me which make me most interested in going to their other platforms.

- **Which brand are you most likely to revisit? Why?**

Franks Hot sauce because of the funny pictures they put up.

- **What did you not see on any of the pages for a particular brand that you were looking for? Why were you looking for this?**

Tapatio had way ~~to many~~ photos of a girl on their facebook and instagram. They should have more pictures of their sauce in the foods they created.

- UserTesting reveals that most people had only positive perceptions toward Tabasco's social media pages.
- But none of our respondents had listed Tabasco as the most notable hot sauce brand on social media.
- Instead, users often selected Frank's Red Hot citing their humorous and relatable content as the main appeal.
- Thus, Tabasco should consider utilizing more humor or capitalizing on current social media trends especially to capture the attention of younger customers.
- Especially as generation Y and Z customers are the two largest generations active on social media, Tabasco should be more willing to take risks in its marketing.

Tabasco is perceived as most similar to Frank's Red Hot





Saved from [youtube.com](https://www.youtube.com)

Frank's RedHot – Astronaut

Frank's RedHot is the Perfect Blend of Flavor & Heat. I Put That \$#!t on Everything. Seriously, everything. Visit Frank's RedHot <http://www.franksredhot.com> ...

[Haha Funny](#) [TV Commercials](#) [Astronaut](#) [Monster Trucks](#) [Ads](#) [Hi](#)

[More information...](#)

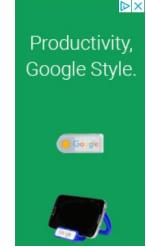
Frank's ads heating up old battle for hot sauce sales

By [New York Times News Service](#)
CHICAGO TRIBUNE

NOVEMBER 17, 2002 | NEW YORK

The battle for bragging rights over which hot sauce is the hottest of all--hot as in popular, that is, rather than spicy--is being kicked up a notch.

Frank's RedHot Cayenne Pepper Sauce, one of the oldest entrants in the increasingly competitive market for hot sauces, is receiving an ambitious makeover from its new agency, MVBMS Euro RSCG in New York. A humorous radio campaign under way carries the theme "A thrill a bite" and is budgeted at an estimated \$5 million. Television commercials and print advertisements are expected to follow.



FRANK'S RED HOT: SUCCESSFUL HUMOR COMMERCIAL

Company Overview

Problem & Opportunity

Research Analysis

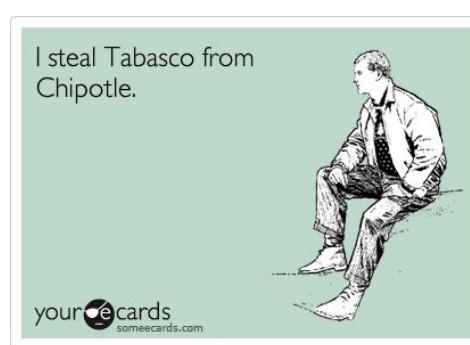
Recommendations

Risks & Challenges

A new persona for Tabasco: Humor Ads and Hashtags



MemeCenter.com



Company Overview

Problem & Opportunity

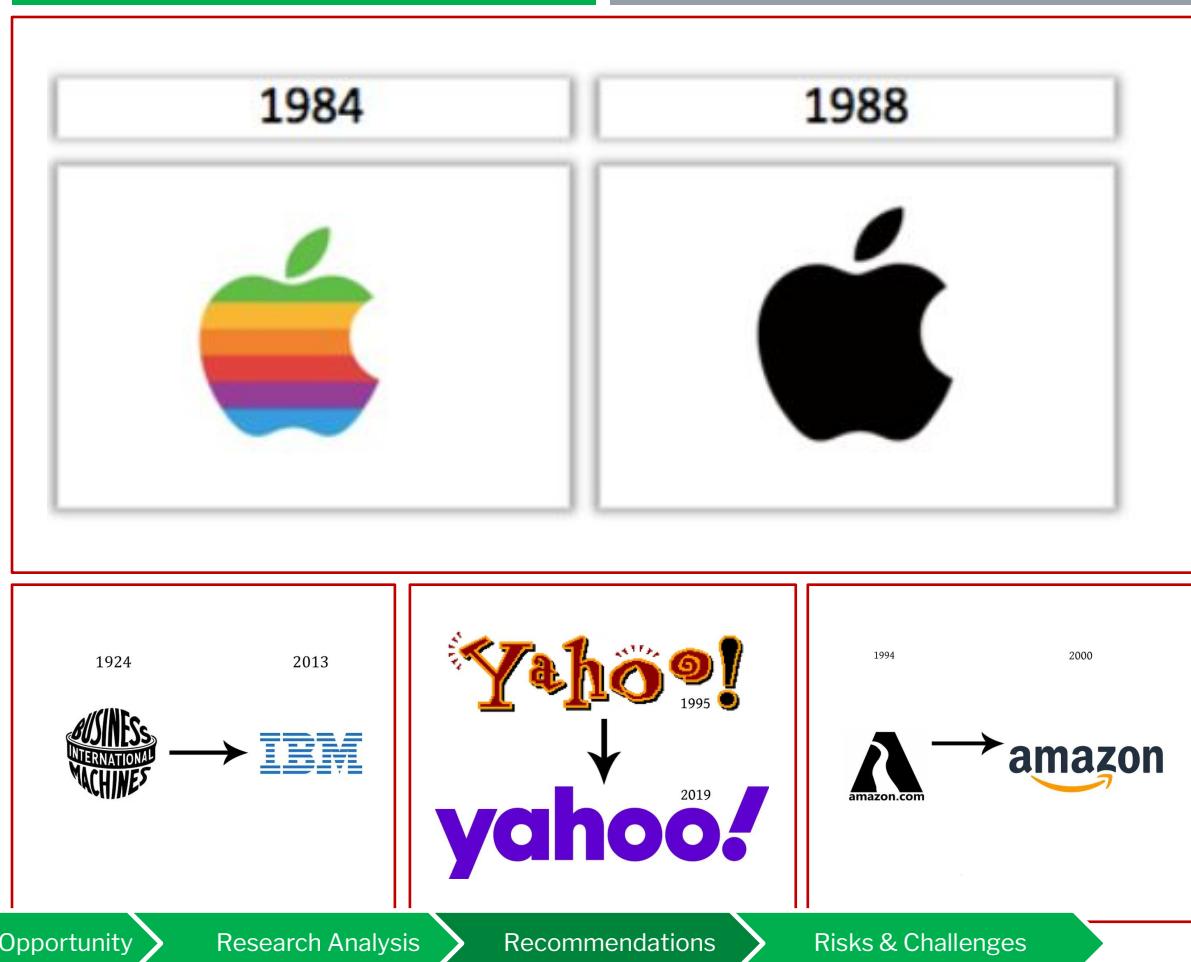
Research Analysis

Recommendations

Risks & Challenges

THE PSYCHOLOGY OF COLOR

- ❖ Color is an important consideration in your brand identity system.
- ❖ Can trigger an emotion and evoke a brand association.
- ❖ Many of the most recognizable brands in the world rely on color as a key factor in their instant recognition.
- ❖ There are 23 brands that uses color to influence their customers i.e. McDonalds



Company Overview

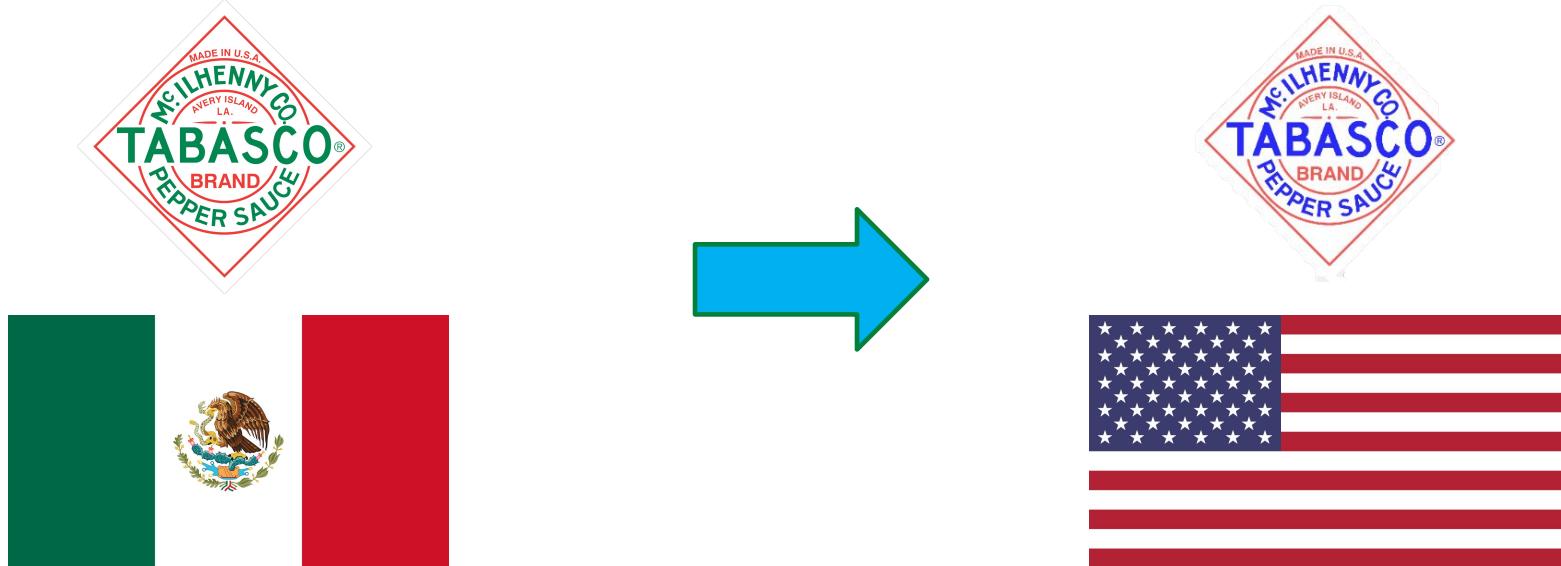
Problem & Opportunity

Research Analysis

Recommendations

Risks & Challenges

TABASCO'S LOGO COLOR IS IMPORTANT IN REPRESENTING A NATION



Company Overview

Problem & Opportunity

Research Analysis

Recommendations

Risks & Challenges

A close-up photograph of a silver shopping cart resting on a dark laptop keyboard. The laptop screen is visible in the upper left corner, showing a blue interface. The shopping cart's red handle is at the top right. The overall composition suggests a theme of e-commerce or online shopping.

Develop Online Presence for Greater Conversions

RECOMMENDATION 3

Tabasco should look to increase their conversion and bounce rate for good

Age ?	Acquisition			Behavior			Conversions	
	Users ? 	New Users ?	Sessions ?	Bounce Rate ?	Pages / Session ?	Avg. Session Duration ?	Smart Goal (Goal 1 Conversion Rate) ?	G
	313,691 % of Total: 35.10% (893,677)	309,840 % of Total: 34.70% (893,030)	381,232 % of Total: 34.58% (1,102,417)	63.93% <small>Avg for View: 66.49% (3.85%)</small>	2.00 <small>Avg for View: 1.87 (7.05%)</small>	00:01:22 <small>Avg for View: 00:01:17 (6.63%)</small>	2.85% <small>Avg for View: 2.80% (1.70%)</small>	G
1. 25-34	94,271 (29.92%)	93,859 (30.29%)	115,783 (30.37%)	65.69%	1.93	00:01:16	2.43%	
2. 35-44	66,575 (21.13%)	65,277 (21.07%)	80,796 (21.19%)	65.86%	1.93	00:01:13	2.43%	
3. 45-54	51,827 (16.45%)	50,606 (16.33%)	62,407 (16.37%)	61.99%	2.05	00:01:24	3.13%	
4. 55-64	44,823 (14.23%)	43,693 (14.10%)	53,524 (14.04%)	61.61%	2.11	00:01:29	3.40%	
5. 65+	33,786 (10.72%)	33,104 (10.68%)	40,293 (10.57%)	62.46%	2.12	00:01:34	3.64%	
6. 18-24	23,744 (7.54%)	23,301 (7.52%)	28,429 (7.46%)	61.94%	2.08	00:01:35	3.03%	



Age ?	Acquisition			Behavior			Conversions	
	Users ? 	New Users ?	Sessions ?	Bounce Rate ?	Pages / Session ?	Avg. Session Duration ?	Smart Goal (Goal 1 Conversion Rate) ?	G
	87,301 % of Total: 31.83% (274,237)	85,840 % of Total: 31.46% (272,885)	103,917 % of Total: 31.35% (331,495)	64.86% <small>Avg for View: 66.79% (-2.89%)</small>	1.96 <small>Avg for View: 1.84 (6.48%)</small>	00:01:27 <small>Avg for View: 00:01:22 (5.77%)</small>	6.94% <small>Avg for View: 6.60% (5.10%)</small>	G
1. 25-34	25,322 (28.87%)	24,805 (28.90%)	30,460 (29.31%)	65.52%	1.92	00:01:27	6.29%	
2. 35-44	15,193 (17.32%)	15,113 (17.61%)	18,104 (17.42%)	66.45%	1.90	00:01:19	6.42%	
3. 45-54	12,882 (14.69%)	12,463 (14.52%)	14,915 (14.35%)	65.04%	1.98	00:01:23	6.85%	
4. 55-64	12,871 (14.68%)	12,511 (14.57%)	15,163 (14.59%)	64.40%	1.98	00:01:27	7.78%	
5. 65+	11,215 (12.79%)	10,949 (12.76%)	13,150 (12.65%)	62.73%	2.08	00:01:38	8.54%	
6. 18-24	10,221 (11.65%)	9,999 (11.65%)	12,125 (11.67%)	63.45%	2.00	00:01:33	6.65%	

2019 Statistics

2020 Statistics

Company Overview

Problem & Opportunity

Research Analysis

Recommendations

Risks & Challenges

Tabasco should consider developing its mobile website browsing

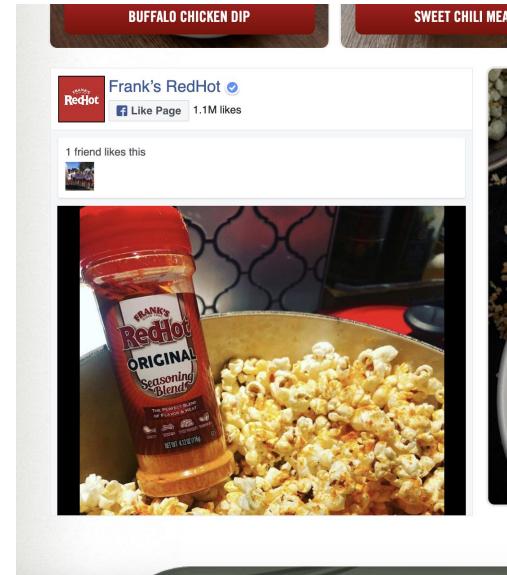
- Consider optimizing the mobile website interface to truly fit the small touch screen, instead of simply having a shrunken down version of the internet website (ex. 360 degree photos)
- Mobile application that could create a more personalized experience for users that could send recommendations for new products to users based on their saved flavor preferences or share news about the brand

Device Category <small>?</small>	Acquisition	
	Impressions <small>?</small> <small>↓</small>	Clicks <small>?</small>
	493,394 % of Total: 100.00% (493,394)	10,302 % of Total: 100.00% (10,302)
1. mobile	331,539 (67.20%)	7,231 (70.19%)
2. desktop	152,519 (30.91%)	2,807 (27.25%)
3. tablet	9,336 (1.89%)	264 (2.56%)



Tabasco should improve social media conversions

	Acquisition		Behavior				Conversions		
	Users	New Users	Sessions	Bounce Rate	Pages / Session	Avg. Session Duration	Goal 1 Conversion Rate	Goal 1 Completion	Goal 1 Value
	893,677	893,030	1,102,417	66.49%	1.87	00:01:17	2.80%	30,922	\$0.00
1 ■ Display	43,197			89.30%			0.46%		
2 ■ Social	77,554			89.00%			0.74%		
3 ■ (Other)	21,428			80.07%			2.12%		
4 ■ Paid Search	75,813			60.54%			2.41%		
5 ■ Email	4,706			63.87%			2.75%		
6 ■ Organic Search	521,982			62.64%			2.99%		
7 ■ Direct	141,082			66.19%			3.66%		
8 ■ Referral	35,780			58.74%			4.68%		



Company Overview

Problem & Opportunity

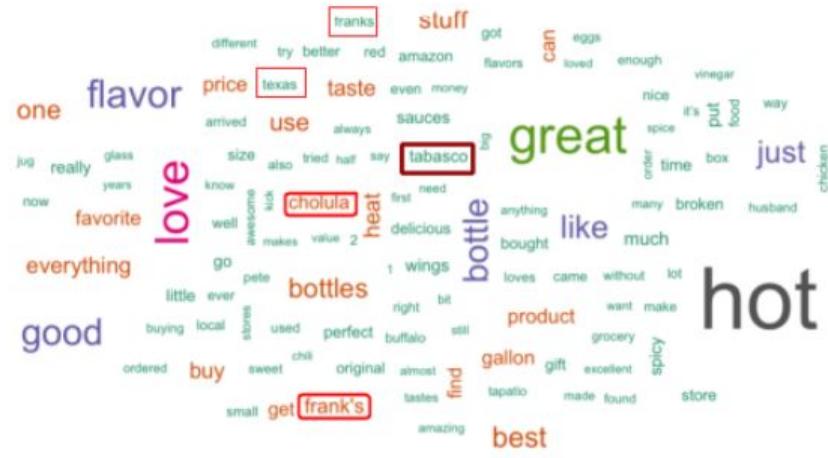
Research Analysis

Recommendations

Risks & Challenges

Tabasco should look to increase their e-commerce presence

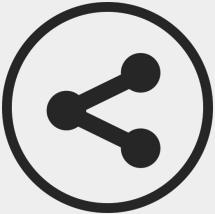
- Increasing general online presence even on e-commerce sites like Amazon will help Tabasco generate more sales through greater awareness
- Focusing on building great customer service and special online deals
- Providing an option to even allow one-time B2B orders



Each of the recommendations comes with risks & challenges



Partnerships: Having too many partnerships may dilute Tabasco's brand image as customers will start to associate Tabasco with the partner they most go to. Since each partner will likely have its own unique brand personality, Tabasco's personality may get lost in the crowd.



Social Media: Relying on humor and taking more risks in appealing to younger customers through social media may alienate other customer demographics. There is also a greater chance for negative responses if content is not done properly.



E-Commerce: Shipping costs may pose a challenge if Tabasco tries to target online sales to individual customers. Tabasco will need to find a way to lower their costs or convince customers to buy in bulk.



THANK YOU!

WE ARE NOW
OPEN FOR ANY
FURTHER
QUESTIONS.

Exhibit 1: Hot sauce is essential for consumers takeout orders

**92% of customers WOULD BE
EXCITED TO RECEIVE A MINI IN THEIR
TAKEOUT ORDER**

**84% of customers would pay up to
\$1 for a Tabasco mini**

**88% of Mini offer the perfect
amount of tabasco sauce**

RESTAURANTS

BELIEVE
Sauces are necessary dish add-ons

EXPECT
Frequent new flavor introductions

WANT
Clean labels & all-natural attributes

DEMAND
Versatility & convenience of
ready-to-use sauces

SAUCES TAKE CENTER PLATE

In today's food landscape, sauces are at the forefront of increasingly flavor-fueled demands by younger generations raised with diversified palates and an abundance of hot sauce options.

HOT SAUCE IS ESSENTIAL
Today's consumers demand flavor, variety and constant innovation

THEY EXPECT HOT SAUCE ON THE TABLE
1 in 5 are annoyed if they have to ask for it

ONE SAUCE DOES NOT FIT ALL
They want multiple hot sauce options

IT'S NOT ALL ABOUT THE HEAT
They turn to hot sauce to enhance overall flavor—not just add heat

Exhibit 2: Hot Sauce Brand Slogan Association

Hot Sauce Slogan Brand Association

	<i>Flavor Your World</i>		<i>Uncap Real Flavor</i>		<i>I Put that [***] On Everything</i>		<i>Drama for Your Mouth</i>	
	2018	2019	2018	2019	2018	2019	2018	2019
TABASCO®	13%	13%	8%	9%	9%	9%	9%	6%
Frank's Red Hot	3%	7%	5%	7%	20%	25%	5%	4%
Louisiana Hot Sauce	8%	7%	7%	6%	7%	8%	8%	7%
Taco Bell	7%	4%	5%	1%	5%	4%	4%	5%
Cholula	3%	3%	6%	8%	4%	1%	3%	2%
Crystal	3%	3%	4%	3%	2%	1%	2%	1%
Texas Pete	3%	3%	5%	2%	4%	3%	6%	8%
Huy Fong Sriracha	4%	2%	4%	2%	3%	3%	4%	2%
Tapatio	3%	2%	2%	2%	3%	2%	5%	2%
Valentina	5%	2%	4%	2%	3%	2%	2%	2%
Other	1%	1%	1%	3%	2%	2%	3%	2%
Don't know	48%	52%	49%	55%	37%	40%	49%	57%
<i>Base Size</i>	(1,014)	(653)	(1,014)	(653)	(1,014)	(653)	(1,014)	(653)

Exhibit 3: TABASCO® Food Service Overview

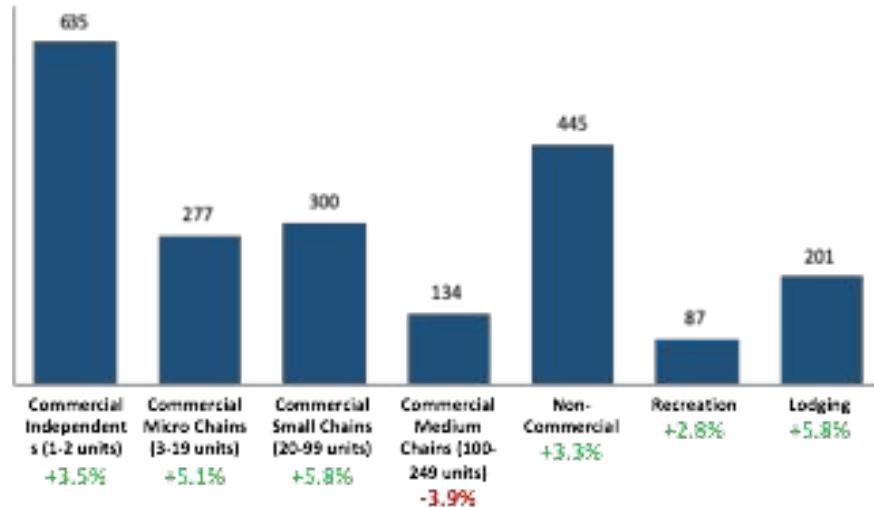
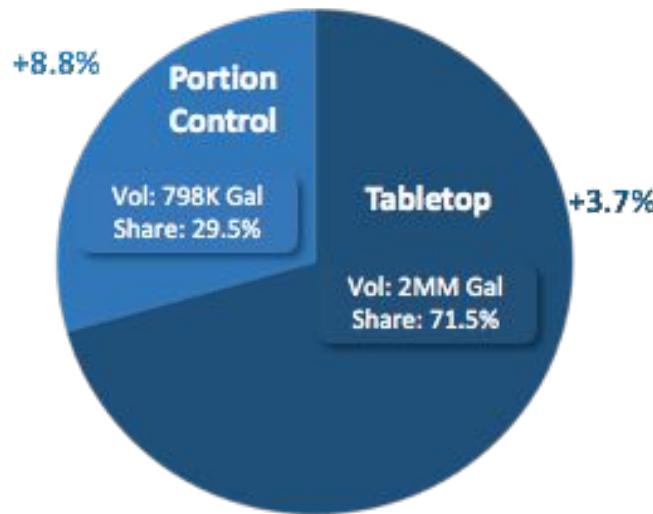


Exhibit 4: 25-34 year old are the most visitors on Tabasco's website

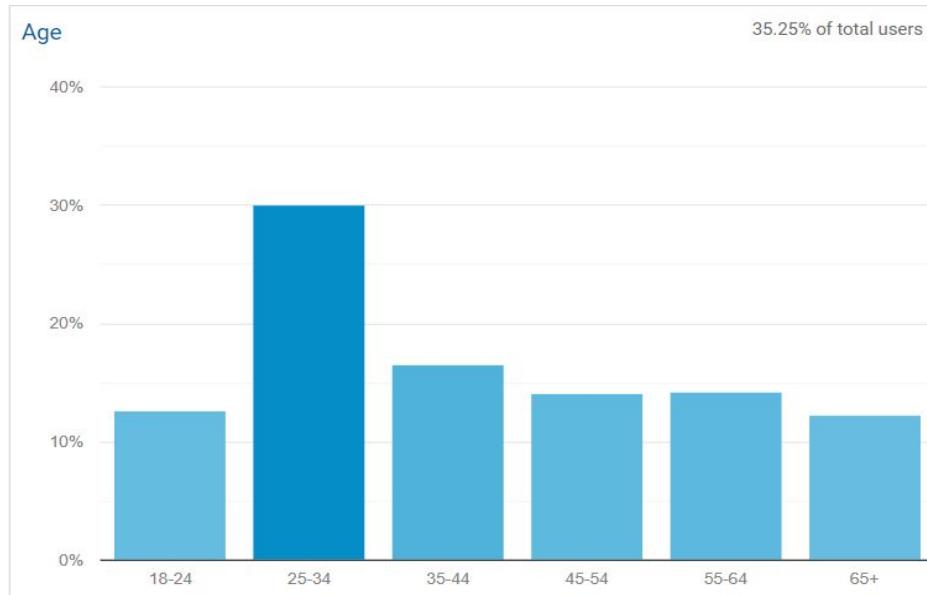


Exhibit 5: Hot sauce reviews are increasingly trending over the years

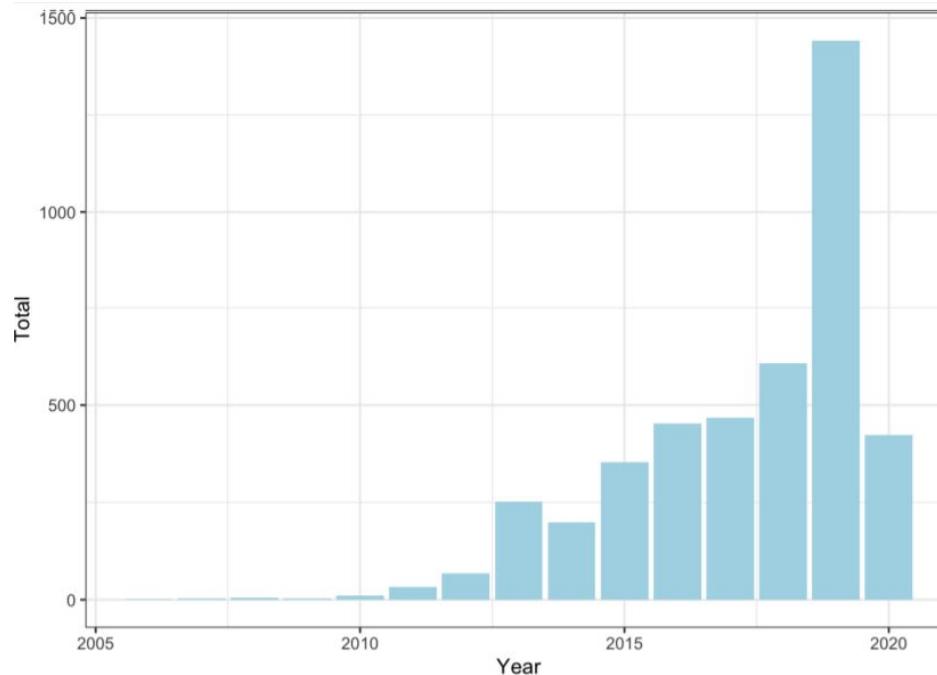


Exhibit 6: There's a decrease review of 12oz bottle Cholula Hot sauce since 2018

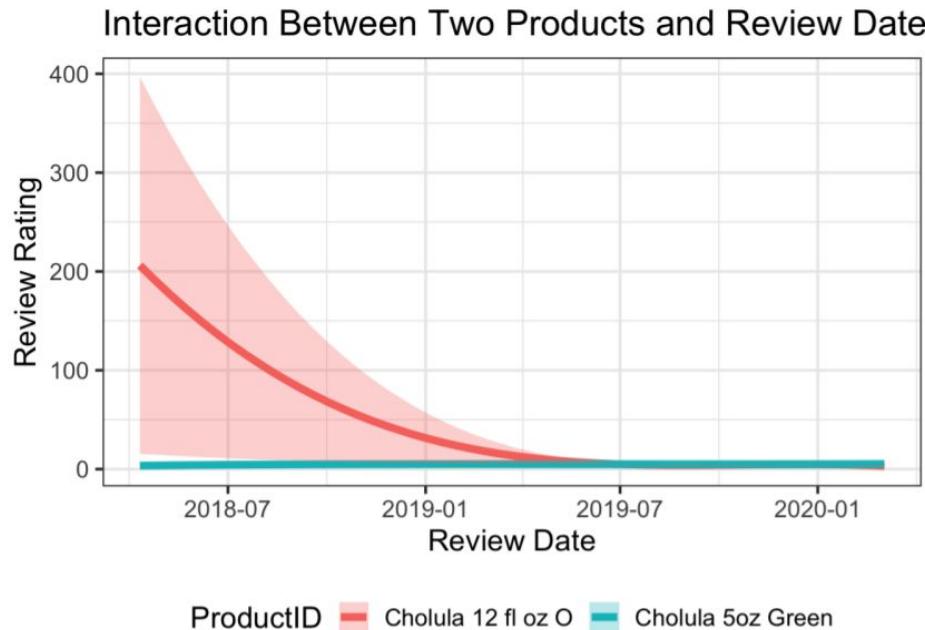


Exhibit 7: Brand Image is most important factor in purchasing hot sauces

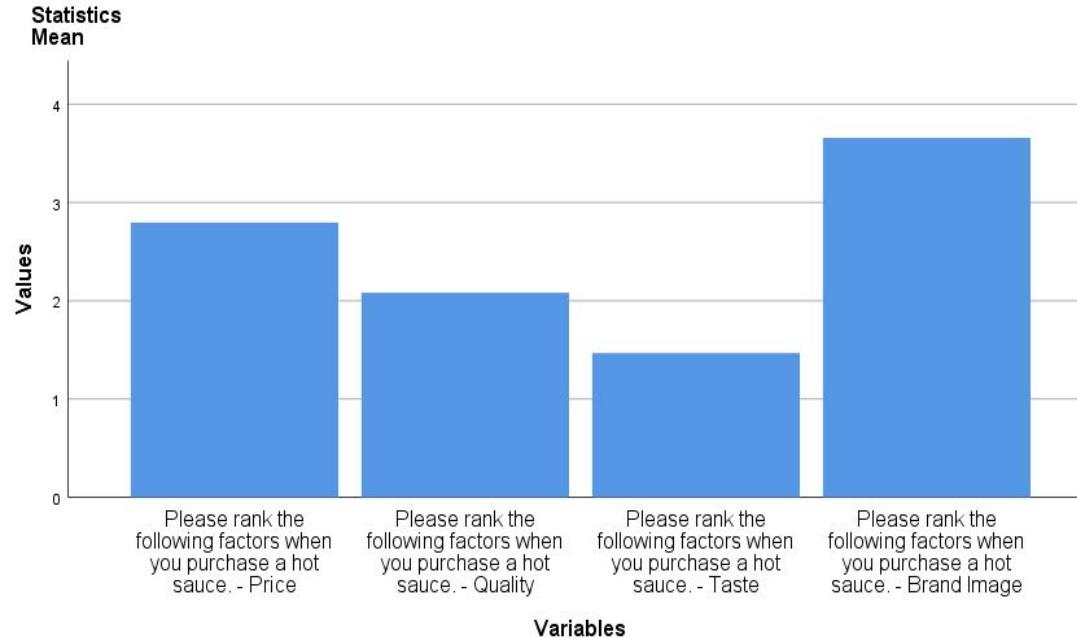


Exhibit 8: Factor Analysis for brand characteristics

Rotated Component Matrix ^a			Rotated Component Matrix ^a			Rotated Component Matrix ^a			Rotated Component Matrix ^a				
		Component			Component			Component			Component		
		1	2		1	2	3	1	2	3	1	2	3
How likely will you recommend the following hot sauce brands to your friends? - LOUISIANA		.839			Please answer the following questions about TEXAS PETE: - I hold TEXAS PETE in high regard	.840		Please answer the following questions about TEXAS PETE: - I hold TEXAS PETE in high regard	.826		Please answer the following questions about TEXAS PETE: - I know a lot about TEXAS PETE	.756	
How likely will you recommend the following hot sauce brands to your friends? - TEXAS PETE		.820			Please answer the following questions about LOUISIANA: - I hold LOUISIANA in high regard	.663		Please answer the following questions about LOUISIANA: - LOUISIANA is relevant to me	.749		Please answer the following questions about LOUISIANA: - I know a lot about LOUISIANA	.739	
How likely will you recommend the following hot sauce brands to your friends? - VALENTINA		.596	.464		Please answer the following questions about VALENTINA: - I hold VALENTINA in high regard	.588	.487	Please answer the following questions about VALENTINA: - VALENTINA is relevant to me	.568	.459	Please answer the following questions about VALENTINA: - I know a lot about VALENTINA	.720	.406
How likely will you recommend the following hot sauce brands to your friends? - FRANKS RED HOT		.529			Please answer the following questions about CHOLULA: - I hold CHOLULA in high regard		.846	Please answer the following questions about CHOLULA: - CHOLULA is relevant to me		.846	Please answer the following questions about CHOLULA: - I know a lot about CHOLULA	.856	
How likely will you recommend the following hot sauce brands to your friends? - TABASCO		.415			Please answer the following questions about TAPATIO: - I hold TAPATIO in high regard		.786	Please answer the following questions about CHOLULA: - CHOLULA is relevant to me		.790	Please answer the following questions about CHOLULA: - I know a lot about CHOLULA	.834	
How likely will you recommend the following hot sauce brands to your friends? - CHOLULA			.879		The TABASCO brand is: - I hold TABASCO in high regard			The TABASCO brand is: - TABASCO is relevant to me		.851	The TABASCO brand is: - I know a lot about TABASCO	.851	
How likely will you recommend the following hot sauce brands to your friends? - TAPATIO			.863		Please answer the following questions about FRANKS RED HOT: - I hold FRANKS RED HOT in high regard		.479	Please answer the following questions about FRANKS RED HOT: - FRANKS RED HOT is relevant to me		.351	Please answer the following questions about FRANKS RED HOT: - I know a lot about FRANKS RED HOT	.332	.656

Exhibit 9: ZMET Images for Tabasco and Hot Sauce



Exhibit 2: ZMET Group 1 Photos and Notes

Prompt: Please select images that you associate with Tabasco

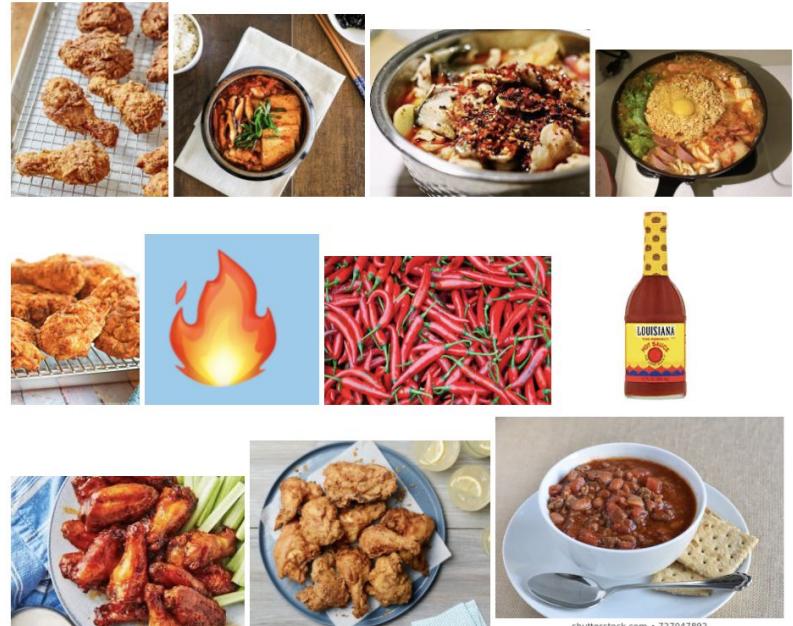
Sample of chosen photos:



Exhibit 3: ZMET Group 2 Photos and Notes

Prompt: Please select images that you associate with hot sauces.

Sample of chosen photos:



shutterstock.com + 727047892