



Contents



INTRODUCTION

01

Editor's Note +
Purpose Of This
Year's Report

02

Our Approach



BEER DRINKER TODAY

03

The Big Picture

04

Their Relationship
With Beer In 2025

05

Repertoire &
Occasions

06

Drivers of choice



INTRODUCTION



Our Research Approach



1000+

of our audience surveyed -
a national audience
including Wales and
Scotland

50

mobile ethnographies -
video diary tasks
completed by community
members across UK

30+

interviews at our festivals
in Bristol, Manchester and
London

4

discussion groups

Who We Spoke To | Our GBD Profiles



01

Pleasure Seekers

This group love the high-fidelity nature of beer and infinite possibilities of choice



02

Beer Geeks

This group loves the search for the very best in beer and sharing their knowledge



03

Deep Connectors

Motivated by moments amongst friends - better beer brings better moments



04

Communitiers

This group loves the sense of community beer has and the feeling of belonging it brings



05

Curious Casuals

This group do not have a strong affiliation with beer - it's just one of many drinks they enjoy.

Welcome Note

Understanding beer drinkers is vital to create the right products, experiences, and communications that drive success. At We Are Beer, our goal is to represent the consumer voice—not only through interactions at our festivals but also by leveraging data-driven insights. That's the essence of the *Good Beer Drinker* report.

Last year, we introduced five drinker typologies, exploring who they are and what draws them to beer. This year, we take a deeper dive into the question: *What drives choice in good beer?*

The findings are fascinating. As drinkers settle into a new normal, they're becoming more discerning and demanding. They increasingly assess choices through product experience, value and the role it plays for them. This shift benefits good beer brands, offering thoughtful consumers significant value and compelling reasons to choose their products.

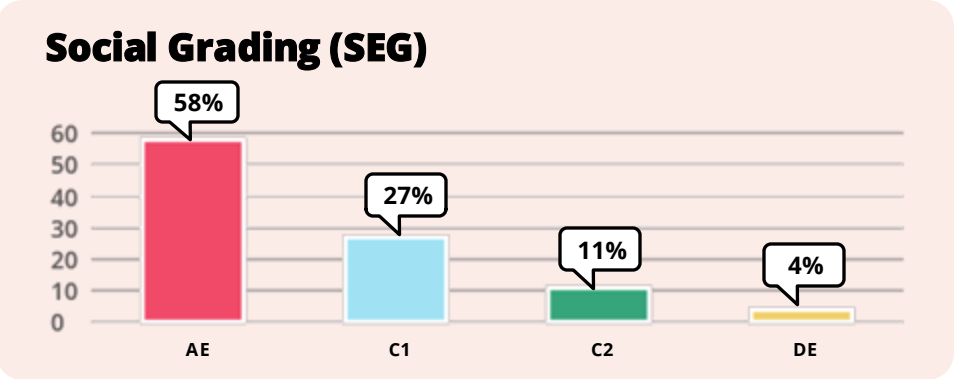
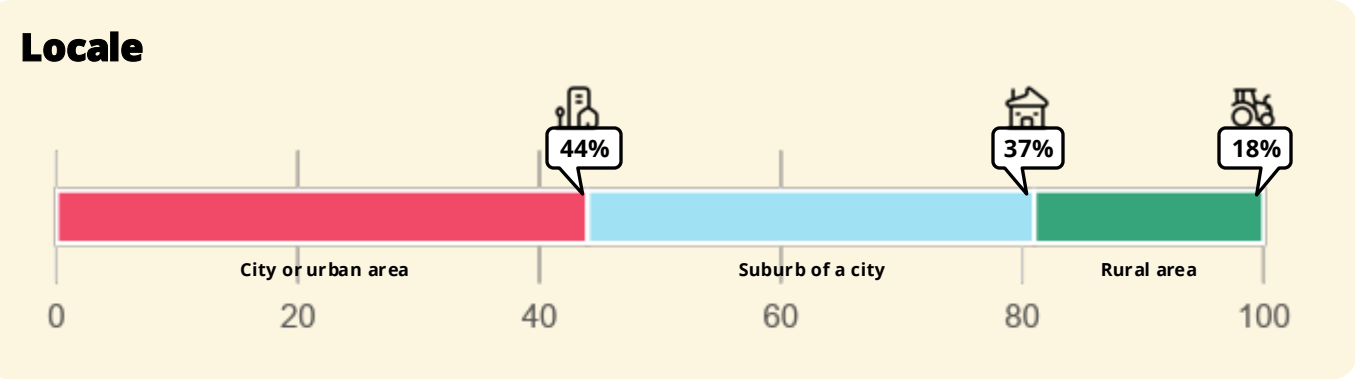
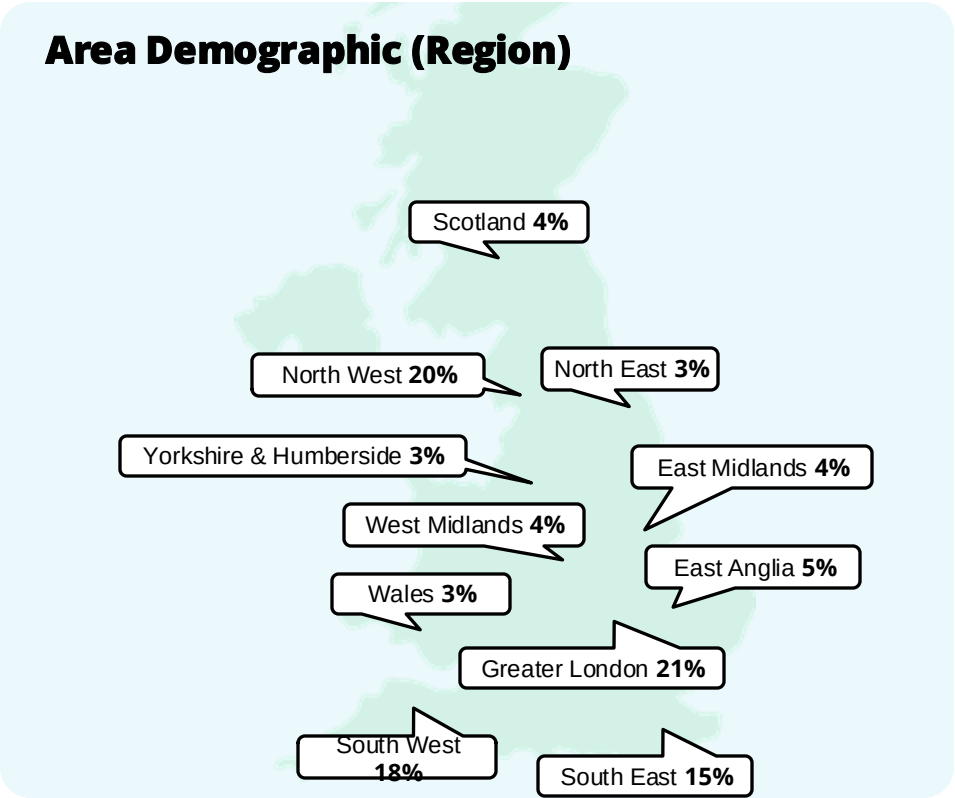
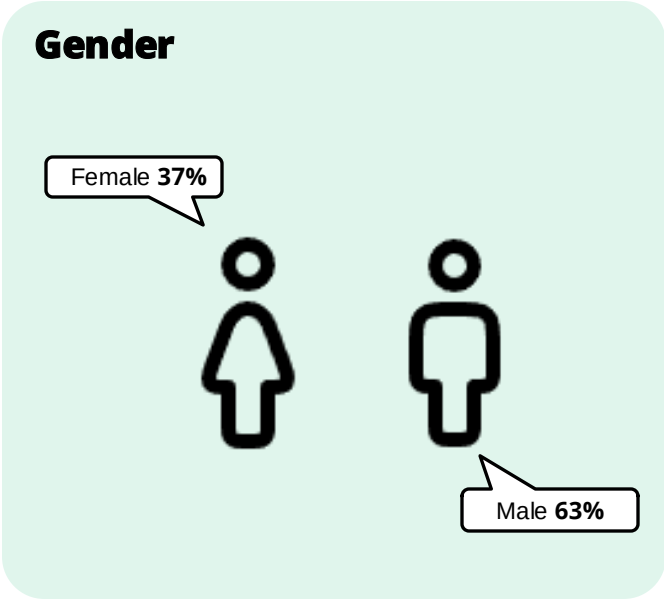
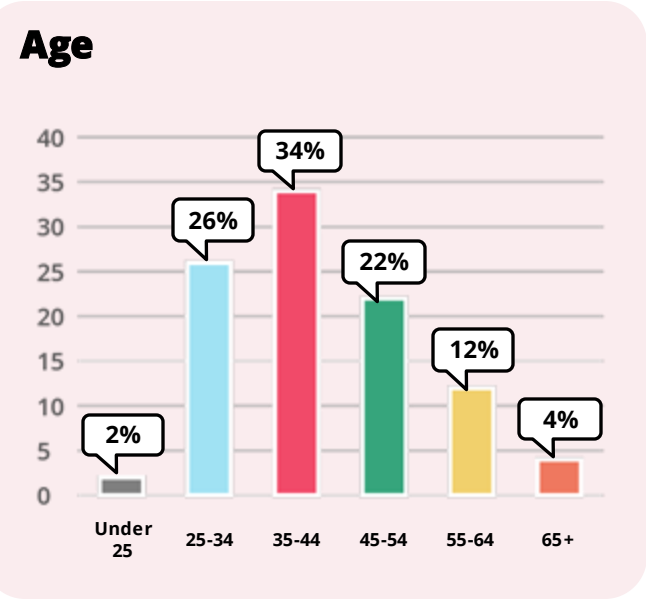
We hope the insights in this report support your success in the year ahead.



Greg Wells

We Are Beer Co-founder

Who We Spoke To





THE BIG PICTURE

The Beer Drinker Today



The Big Picture

What's shaping their wider mindset
and values beyond beer in 2025

01

Loyal F+B
Fanatics

02

Returning Consumer
Confidence



03

Embracing
Balance

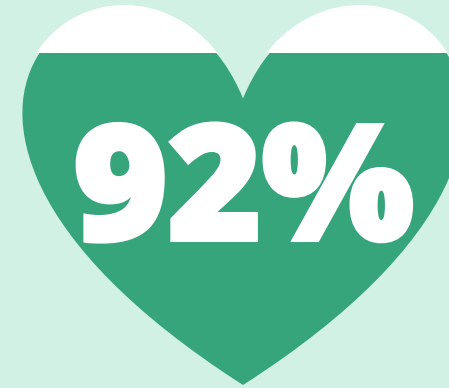
04

Good Quality =
Good Value

1. Loyal F+B Fanatics

Their passion for food, beverage and beer remains undimmed...

- Food and drink is central to their individual and social identities
- Social experiences take priority over material goods
- Investing a lot (money and time) on food and drink experiences



say they are passionate about food and drink
Versus 61% nationally



76%

say 'my friends often ask me for recommendations
or about new things happening in food and drinks,
like restaurants, products, events, etc.'

1. Loyal F+B Fanatics



We did a road trip around France last year...I love the experience of being able to have a three course meal every night!

Pleasure Seeker

25-34, Scotland



I've always just loved eating, so naturally I am also very passionate about cooking.

Pleasure Seeker

25-34, London

2. Returning Consumer Confidence

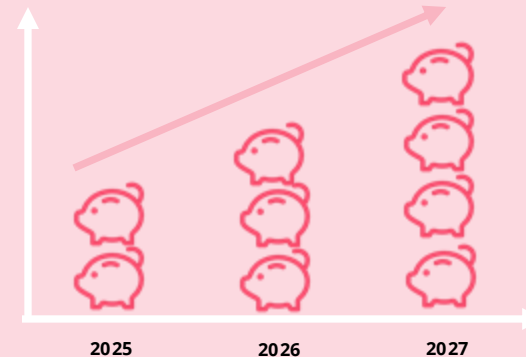
After enduring the worst of the 'cost of living crisis' they're starting to loosen the purse strings

- A sense of shift back towards a period of relative socio-economic stability
- Starting to take less of a 'reductionist' attitude towards spending
- Reintroducing more treats and little luxuries back into their daily lives



73%

say they are optimistic about the future



63%

say they 'expect to be better off financially in the next three years time'

2. Returning Consumer Confidence



The last 18 months has been pretty tricky for everyone but I feel like we're getting over a hump financially.... Things feel slightly better these past three to six months.

Communitier,

South-East, 35-44



The cost of living [crisis] meant you noticed all the prices going up over the past year but I'd say in the past three months it seems to have gotten a bit easier - things seem to have stabilized.

Communitier

London, 35-44

3. Embracing Balance

Following the ups and downs of recent years people are seeking wellbeing through *balance*

- Balance is about prioritising wellbeing, both physically, mentally, socially and professionally
- Approaching their lives with a greater sense of intentionality - doing things because they actively want to
- They're building lifestyles that allow for treats AND training, splurging AND saving, care for body AND mind!



87%

say maintaining a social life is an important part of a healthy lifestyle



83%

say a priority in their life is achieving work / life balance

77%

say a priority in their life is flexibility and freedom

3. Embracing Balance



I think drinking and running can go together...I've had Personal Best times at ParkRun after having a few beers the night before - it's all about balance.

Beer Geek,

Yorkshire and Humberside,
35-44



I'm running the Chicago marathon this year - trying to balance the books between exercising and drinking is always a fun challenge!

Pleasure Seeker,

London, 35-44

4. Good Quality = Good Value

Recent scrutiny of their spending habits has led to more clear headedness around 'good value'

- Searching for 'quality' in things they care about like food / drink, and their hobbies: outdoors, music, running, etc.
- Brands representing quality resonate both in terms of cultural taste AND implicit value of the product
- Quality and value is all about durability, provenance and expertise
- Paying for more better quality is essentially a hedge against disappointment
- It's about smart investment of their time and money, avoiding the false economies i.e. 'buy cheap, pay twice'

91%

say it is always worth paying more for better quality food and drink



4. Good Quality = Good Value



I have got to the point in life where I want to avoid the whole 'buy cheap, pay twice' thing, so now I like to put a bit more money behind a purchase if something's meant to last.

Communniteer

35-44, South-East



This year we decided to go to the butchers over buying stuff out of the supermarket. You can ask the butcher questions, and you can see the stuff before you buy it - it's a much better quality experience.

Pleasure Seeker

25-34, London



RELATIONSHIP WITH BEER

The Beer Drinker Today



Beer is Meeting Their Needs & Aspirations

How our 'big picture' trends connects with their relationship with beer today

01

Unparalleled
Variety

02

Invested in Beer's
Social Equity



03

Fitness, Beer
and Balance

04

Appreciation Through
Intentionality

1. Unparalleled Variety

Beer remains unparalleled for discovery and variety

- For drinkers beer is still a category filled with endless variety
- It flexes across a range of categories, styles & occasions
- As well as a space for innovation in flavours, brands & experiences
- This keeps them excited and engaged in a way that wine, whisky or spirits just can't compete with!



91%

agree that they enjoy spending time discovering new beers and brewers



70%



say that a beer being 'something new, that I've not seen before' is a driver to choose that beer

78%

disagree that they find the amount of choice in beer overwhelming



1. Unparalleled Variety



To me beer is really special because it's constantly innovating; creating new styles and sub-styles - there's always something new coming out to try.

Pleasure Seeker,

London, 35-44



2. Invested in Beer's Social Equity

Beer's role in facilitating regular social connection is important to them

- Drinkers prioritised regular trips to pubs / taprooms - in spite of the cost of living crisis - because of the social balance and connection it brings
- Many made cutbacks but made sure to ring fence money for time seeing friends down the pub as a social priority
- Good beer experiences are central to these moments of important social connection



71%

say 'my neighbourhood pub is important to me'



77%

say the 'social benefits of having a beer are important to me'

2. Invested in Beer's Social Equity



We thought after covid we'd all be going round each other's houses for beers but there's just something special about going to the pub...you're happy to pay for the people and the atmosphere.

Deep Connector,

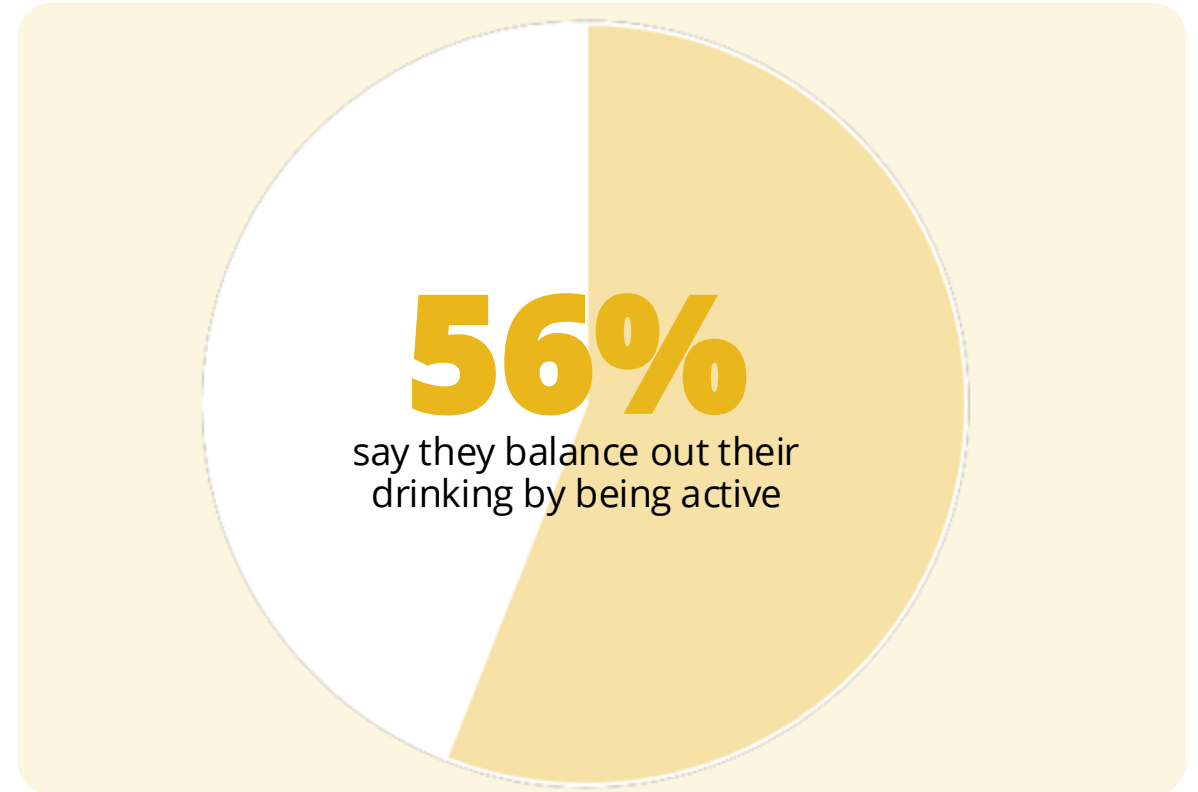
London, 35-44



3. Fitness, Beer & Balance

While some are reducing their alcohol intake, for many beer and exercise are not in tension, but part of balanced lifestyle.

- Exercise and responsible beer drinking contribute to their wellbeing and a balanced, healthy life
- There is cross over - both fitness and beer moments are seen as ways to decompress, feel good, and have positive social aspects too
- Our community are active, involved in outdoors, climbing, cycling, etc.
- But running has most significantly intersected with Good Beer, thanks to run clubs and widening of running culture through Park Run, etc.



3. Fitness, Beer & Balance



On Friday's after I finish working at home, I'll run the 8k to my local craft beer shop. I'll have a beer or two, then buy one or two cans to take home with me. I like using that as a decompression thing at the end of the week, combining the running with having a beer.

Pleasure Seeker

London, 35-44



4. Appreciation Through Intentionality

A search for quality beer moments instead of 'filler beer' ones is elevating beer out of the everyday

- Leading more 'balanced lives' means they've taken a more intentional approach to drinking
- If there's nothing on offer they enjoy or are excited to try, they might not drink at all
- They're trying to avoid 'Filler Beers' i.e. beer that fills you up but that lacks quality and purpose
- Stripping back of frequency and adding in more "days off" means feeling more invested when they do drink
- A re-calibration of their relationship with beer to something more considered and consciously enjoyed



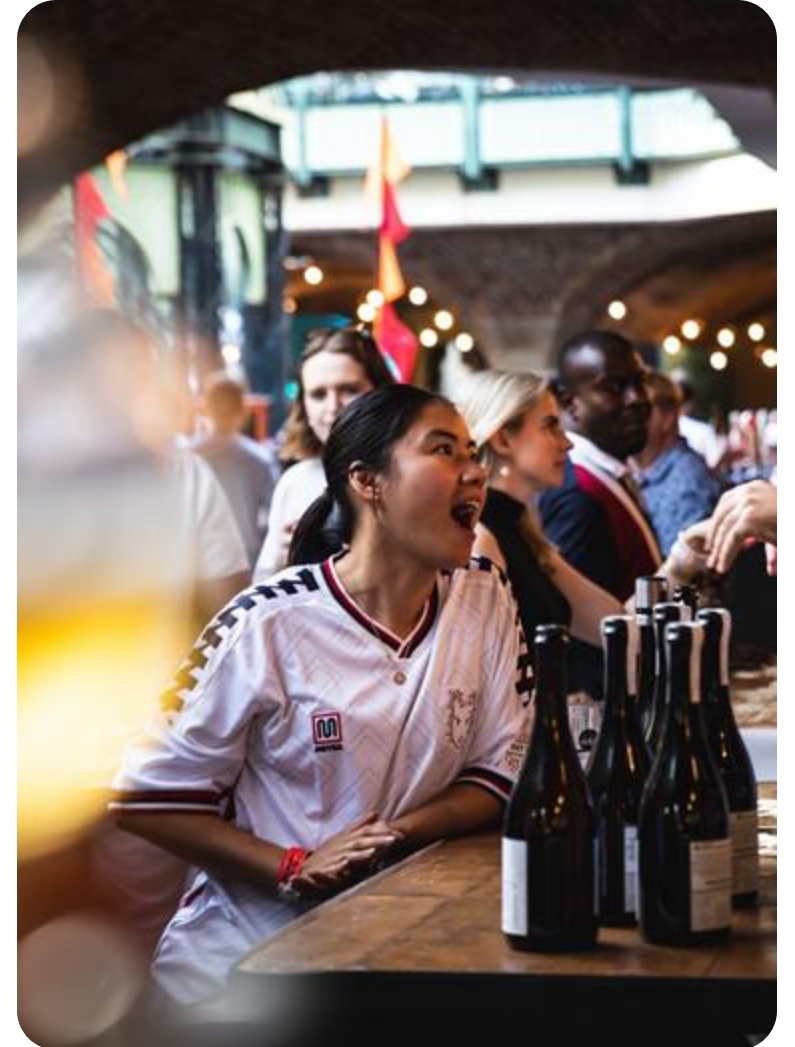
4. Appreciation Through Intentionality



My overall beer consumption is down compared to previous years. I've moved away from drinking filler beer and just drinking for the sake of it. Now, I like to drink one or two stronger beers of something I like, then I'm happy to stop."

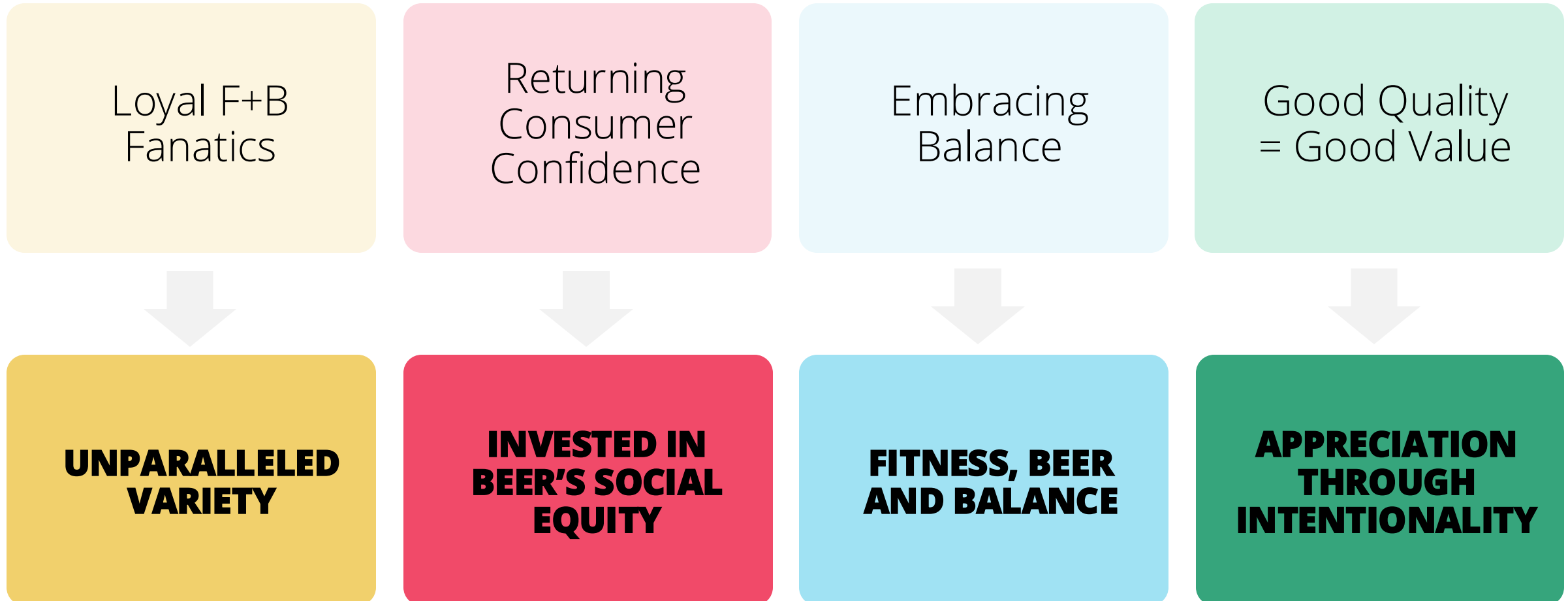
Communitier,

South East, 35-44



The Big Picture -> Beer Behaviours

How our 'big picture' trends connect with their relationship with beer today





REPertoire & OCCASIONS

The Beer Drinker Today



Tropical hops still top of the pops.

But ABV is on the drop.

- Hoppy beers dominate their repertoire.
- IPA, SIPA, Pales, Hazies all feature in top styles
- Brewdog, Beavertown, Verdant, Deya, Cloudwater, Track and Vocation feature in Top 10 favourite brands
- Brewdog, Beavertown & Northern Monk are brands most regularly consumed
- However, signs ABV is dropping
- IPA, NEIPA and DIPA slightly down, while SIPA jumps up.
- Driven in significant part in most ardent beer fans looking for lower ABV beers

Hoppy styles drunk in last 3 months.

- IPA (76%)
- Session IPA (70%)
- Pale Ale (70%)
- Hazy Pales (69%)
- New England IPA (59%)
- Double IPA (52%)
- Cask Ale (53%)



Lager is ever more exciting...

...but also more competitive

- Percentage with craft lager in their repertoire dropped > 78% to 69%
- But increases in German / Czech, world and global brand lager increased slightly.
- Competition from session IPA too
- The most popular style for our Deep Connector typology
- Camden Town and Brewdog feature heavily as go-to brands amongst lager fans



69%

Drink craft lager



56%

Drink German / Czech lager



47%

Drink global brand lager



A repertoire of flavours and styles

All our drinkers want a variety of beer experiences...

- Stouts and porters increased across typologies
- Fruit and sours drive “must try” experiences - Vault City the most popular brand
- Cask Ale maintains popularity across good beer drinkers
- Belgian beers maintain popularity with 1 in 3 including in repertoire



58%

Have stouts and black beers in their repertoire.
Up 5% pts from last year



52%

Enjoy fruited and sour beers in their repertoire

53%

Enjoy Cask in their repertoire



PREFERRED STYLES IN REPERTOIRE

Beer styles drunk most frequently in a 3 month period...

2024

1. IPA (76%)
2. Session IPA (70%)
3. Pale Ale (70%)
4. Hazy Pales (69%)
5. Craft Lager (69%)
6. New England IPA (59%)
7. Porter / Stout (58%)
8. Double IPA (52%)
9. Cask Ale (53%)
10. Sour (52%)

2023

1. IPA (79%)
2. Craft Lager (78%)
3. Pale Ale (75%)
4. Hazy Pales (71%)
5. Session IPA (65%)
6. New England IPA (61%)
7. Double IPA (58%)
8. Porter / Stout (53%)
9. Sour (50%)
10. Cask Ale (50%)

FAV BRANDS IN REPERTOIRE

Most commonly nominated favourite brewery in repertoire...

2024

1. Vault City
2. Brewdog
3. Deya
4. Verdant
5. Beavertown
6. Tiny Rebel
7. Cloudwater
8. Track
9. Guinness
10. Vocation

2023

1. Brewdog
2. Vault City
3. Tiny Rebel
4. Verdant
5. Beavertown
6. Deya
7. Vocation
8. Cloudwater
9. Track
10. Northern Monk

MOST FREQUENTLY PURCHASED

Brewery most purchased across cohort in last 3 months

2024

1. BrewDog
2. Beavertown
3. Northern Monk
4. Deya
5. Tiny Rebel
6. Verdant
7. Guinness
8. Vault City
9. Siren
10. Camden Town



KEY CHANNELS

Where have they purchased in last 3 months

2024

1. Pub (90%)
2. Supermarket (72%)
3. Taproom (72%)
4. Restaurant (60%)
5. Bar / Wine Bar (56%)
6. Specialist off license / bottle shop (42%)
7. Convenience store (30%)
8. Online beer specialist (26%)

2023

1. Pub (88%)
2. Supermarket (74%)
3. Taproom (72%)
4. Restaurant (61%)
5. Bar / Wine Bar (55%)
6. Specialist off license / bottleshop (50%)
7. Online beer specialist (36%)
8. Convenience store (29%)



DRIVERS OF CHOICE

The Beer Drinker Today



Drinker Typologies | Motivations



01

Pleasure Seekers

This group love the high-fidelity nature of beer and infinite possibilities of choice

34%
of our audience



02

Beer Geeks

This group loves the search for the very best in beer and sharing their knowledge

16%
of our audience



03

Deep Connectors

Motivated by moments amongst friends - better beer brings better moments

24%
of our audience



04

Communitiers

This group loves the sense of community beer has and the feeling of belonging it brings

14%
of our audience



05

Curious Casuals

This group do not have a strong affiliation with beer - it's just one of many drinks they enjoy.

12%
of our audience

Good Beer Drinker Typologies | Motivations

	Pleasure Seeker	Beer Geek	Deep Connector	Communitier	Curious Casual
Motivation	Discovery and newness	Knowledge & Status	Connection & conversation	Community & belonging	Cultural experiences
Connect with	Flavour, bold personality	Quality, Exclusivity & Provenance	Sessionable accessible & reliable	People, places, stories	Bold brands & variety

What Drives Choices in The Purchase Moment

Most motivating drivers ranked

01

Flavour & Experience

02

Discovery

03

Trust & Value

04

Locality & context

05

How it makes me feel



brand ethics



Key Drivers In Detail: Flavour & Experience

People demand delicious

- “Great taste” is the primary driver across every major occasion
- For the majority of drinkers that’s something that they can go back to time and time again
- Across styles but also within styles, flavours have been intensifying - from ‘notes’ to actual flavour
- Curiosity in flavour a big driver too drives recommendation - especially for Pleasure Seekers and Beer Geeks looking to have their palette surprised!
- Trend toward sweeter, fruitier flavours cuts across groups (least with Deep Connectors)



72%

Said “balanced and moreish”
was important to them.
Our #1 driver of choice



50%



say distinctive flavour is important



1 in 4

say bitterness a barrier to choice vs 1
in 10 for fruitiness



When you've got something in your mouth that hasn't really got any flavor, no kind of mouth feel, it's just a liquid that's got some level of alcohol in, you kind of go, 'that's just disappointing'.

Communitier

45-54, London



I look for beers that makes my brain interested and engaged with the drink, something that can perk you up and make you say 'hang on there's something really interesting in the taste here'.

Pleasure Seeker

35-44, South-East

Key Drivers In Detail: Flavour & Experience

Product experience elevates flavour

- People want optimum experience across serve, mouthfeel and brand
- Particularly for on-trade correct temp, pour and glassware match experience they're looking for
- In off-trade, chilled works to convey quality
- Imagery posted on socials of Hazy pales and IPAs, Fruit Sours and Guinness have all helped to elevate the expectations around colour, consistency and pour



56%

Say it looking high quality is important in choosing a beer

1 in 3



say serve temperature wrong a barrier



"Even though they have it Guinness on tap at the casino, I never drink it because the way they pour it is terrible...I'd rather not drink beer at all."

- **Beer Geek**, 35-44, London



There's a couple of places near me that keep everything ambient which, if you know your beer, means you don't know how long that that Kernel Pale Ale has been on the shelf, how do I know if it's still going to taste good?

Communitier

45-54, London



Key Drivers In Detail: Discovery

In bar or at fixture 'newness' remains a powerful pull

- Variety is core to good beer's appeal with discovery being the second biggest driver across all occasions
- Particularly driven by Pleasure Seeker and Beer Geek typologies
- A factor in all channels but at home experimentation - trying new things is important
- Influential but not a top 3 factor for Deep Connectors, Communiters and Curious Casuals
- New news in product offer is vital for retail and important for many breweries



70%



Say "something I've not seen before" is important in choosing a beer

>1 in 3

Say "something I've never tried before" a key factor in on-trade purchase

#1 | 4 in 5

Pleasure Seekers and Beer Geeks cite "not trying before" as important decision driver. Their #1

I wish the supermarkets would rotate things a bit. I feel like I've completed my local Tesco!

Pleasure Seeker

25-34, Manchester



When I visit a taproom I like to do a sort of, side by side comparison with as many beers as possible, so I can taste the different nuances that come through.

Beer Geek

55+, Wales



Key Drivers In Detail: Trust & Value

In a crowded category, where prices have risen people want confidence in making the right choice

- Trust and value important across all segments but especially for those less into specialist beer
- Brand trust really important for Deep Connectors - the biggest volume typology
- Price sensitivity is most important to those under 35, so plays key factor in trial and recruitment
- Word of mouth and recommendations are vital in underpinning choosing confidently



62%

Said a "brewery I know and trust" is an important factor



62%



Said "reasonably priced" is an important factor



12%

Say a recommendation is unimportant



Sam Smith pubs were always cheaper and handy in central London but we went to one this year and the beer tasted bad...even though they're in nice old buildings, I'd still prefer spending a little bit more to go somewhere where the quality is better.

Deep Connector

35-44, London



I visit my local often. It's not got the best selection but always has Guinness and Tiny Rebel, so I know can always choose a good beer that is very well priced.

Beer Geek

55+, Wales

Key Drivers In Detail: Locality & Context

Though over 66% agree taste, quality and brand is more important, locality & context remains vital

- Breweries and retail can continue to count on home support and locality driving choice in their range
- Not necessarily all about production locality - “popular in my local” adds important meaning to their choice
- People want shared experiences in beer - so making choice for all in that context is important.
- Also important for off-trade social occasions - hosting, BBQ, sports etc



2/3

Say it's “important it's made by a local brewery”



63%



Say it being it being “available in their local pub” pushes them to the beer



1/3

Look for beers that are great to drink with friends - more for Deep Connectors and Communitiers



When I'm travelling around the country I'll look for Scottish beers, as well as beers from local breweries that are unique to that area.

Pleasure Seeker

25-34, Scotland



I like that Camden is from London and has a cool brand - so if I can, I'd always choose that if I'm having a lager.

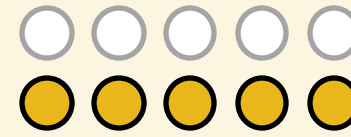
Curious Casual

35-35, London

Key Drivers In Detail: How it makes me feel

Drinkers are more conscious of their body and how different drinks and occasions make them feel

- Many drinkers aware of kinds of beer or occasions that leave them feeling bloated
- They are equally aware of over-consumption and impact on their sleep, energy, concentration etc
- Having choice from treats, to lower ABV to non-alc is important in giving people options
- While 'better for you' claims are not cutting through to all, it is growing
- All this is more important to those less into beer and newer to the category



Half

Say it's important their beer choice doesn't leave them feeling bloated

50%



Of curious casuals say bloating is a barrier to beer choice. The biggest barrier

1 in 10

Looking for beers with "better for you" claims - GF, low-carb, gluten free





If I've been out at work all day and I come back home feeling thirsty, I'll often have a zero percent beer to try and rehydrate. Then I'll have a few normal beers afterwards.

Pleasure Seeker

25-34, Scotland



My partner and I will have one or two beers on the Friday night and that's it. That might be a fiver percenter each or maybe sharing a seven to ten percenter. When I know I've got the gym on a Saturday morning, I don't want a hangover.

Beer Geek

25 - 34, Midlands

Key Drivers In Detail: brand ethics

A strong purpose can really motivate those into the category, but get it wrong and it's a big barrier

- People looking for companies to lead the way - over 80% claiming companies must do better on social and environmental issues
- People will respond to those that invest in their community
- However, issues can only play a supporting role in relation to flavour, access, reliability, etc.
- Biggest watchout is getting it wrong - this can be fast be a barrier to choice. esp. for younger drinkers



3/4

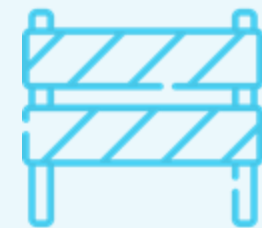
Say that they buy because they want it over any social or environmental claims

+50%

Actively search out and buy brands with positive social or environmental claims

#2

Barrier is breweries having a poor record of social or environmental impact.



Drinker Typologies | Key Drivers Summary

	Pleasure Seeker	Beer Geek	Deep Connector	Communitier	Curious Casual
Motivation	Discovery and newness	Knowledge & Status	Connection & conversation	Community & belonging	Cultural experiences
Top 3 Drivers	Flavour & Experience - Intensity	Flavour & Experience - Quality	Flavour & Experience - Sessionability	Flavour & Experience - Sessionability	Flavour & Experience - Refreshing
	Discovery - not tried before	Discovery - first to try / know about	Context - great to drink with friends	Context - great to drink with friends	Trust & Value
	Local - cultural experience	Trust & Value - quality brand	Trust & Value - quality, well priced brand	Local - support their city	How it makes me feel
Biggest barrier	Value	Brand ethics	Value	Brand Ethics / Value	Bloating

THANK YOU

Follow us on...



Weare_beer



We-are-beer



wearebeer.com



Greg@wearebeer.com



Thanks for reading!

Get in touch:
Greg@wearebeer.com

