

*We are*  
**BEER**

**INSIGHT**

# ***THE GOOD BEER DRINKER***

*FULL REPORT 2024*





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# ***INTRODUCTION***



# A NOTE FROM WE ARE BEER CO-FOUNDER, GREG WELLS

## Why are we writing this report now?

Good beer has been on some journey in the last decade or so. The craft beer revolution was a moment of disruption for the beer category. It was sparked by some creative and entrepreneurial visionaries *but* was also driven by bigger cultural trends around quality, a desire for authentic experiences, and a longing for meaningful community. Craft unleashed the potential of beer and it changed the category and culture for a lifetime; new styles, new retail outlets, taproom culture, household-name brands, hundreds of new breweries, and winning millions upon millions of new drinkers. And that is why we're here. The drinker.

## From Craft Beer to Good Beer

When we first started our festival in 2013 - alongside the founders of fledgling businesses like Camden Town, The Kernel, BrewDog, Beavertown, Siren and Magic Rock - one of the comments was how different this new beer crowd was. What those brewers had created, and what we were trying to do at We Are Beer, was reaching whole new audiences. Roll forward a decade and craft beer has entered the mainstream - established in supermarket aisles, poured at Premier League stadiums, and a taproom in every town. Our business has gone from a couple of thousand visitors that opening year to welcoming over 200,000 visitors in the decade gone. We've seen those first, thirsty audiences grow into mainstream good beer drinkers, but most importantly we see *distinct* groups, with *unique* motivations and needs, responding to *different* things. That's what this report is all about.





# WHY IS THE DRINKER IMPORTANT?

*With all the turbulence and challenges facing the beer industry, now more than ever an understanding of the drinker is key.*

*Knowing your core audience not only allows you to deliver your creative vision in an engaging way, it also allows you to tailor your strategy to ensure you invest in the experiences and products that your drinker cares about.*





# WHAT DOES THE REPORT SET OUT TO DO?

**This report aims to paint a clear picture of the mindset of the drinker today by bringing to life what they love about beer, and how that manifests in their choices and behaviours.**

We wanted this insight and learning ourselves, but we also recognised the need from our partners for information, and for insight, to help navigate these challenging moments.

We don't have reams of sales and channel data and as such this report was never going to be that kind of market analysis. So if you came to know what % of 25-35 year olds drink Session IPA in the North West and how does that differ to the South East, you're in the wrong place. However, we do have a large audience, we're insiders to this sector, and as a business we're well placed to get a lot of information to draw our insight from.

If you've worked with us before, we wanted to give you something for the investment you've given us and make sure you see We Are Beer as a valuable platform you continue to invest your resources into. If you've not worked with us before, we hope this shows our live experiences and our audiences are a brilliant place to showcase your brands and build your businesses.

On Behalf of We Are Beer, thanks for taking the time to read this report, we trust you find it useful.





# A MULTIFACETED METHODOLOGY

**40** in-person interviews at the London, Manchester and Bristol festivals this summer

Over **1000** of our audience surveyed - a national audience including Scotland

**500** external audience surveyed

**6** online discussion groups

**3000** festival beer list app users data

**10** expert interviews with owners, MDs, brand ambassadors, sales and route to market professionals.

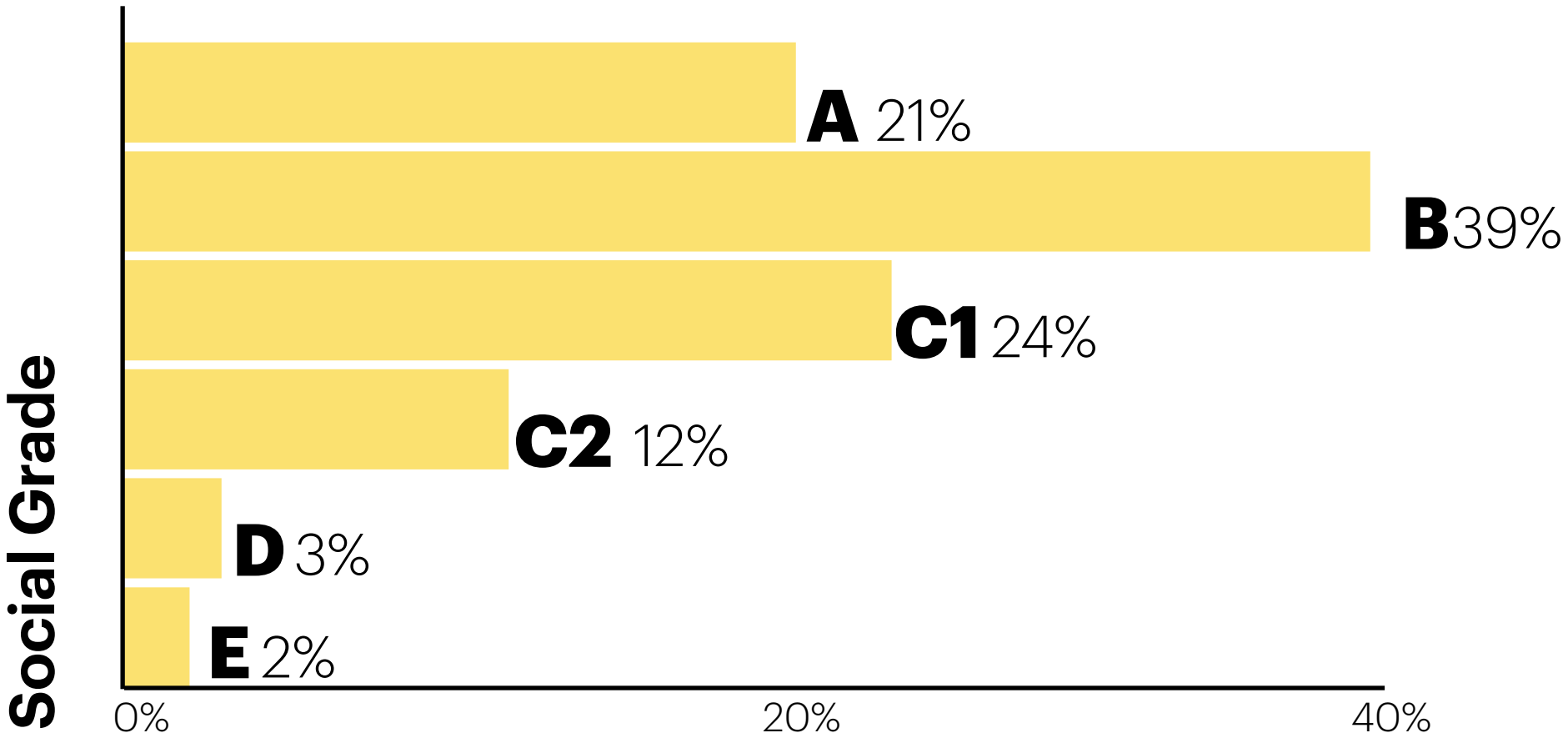
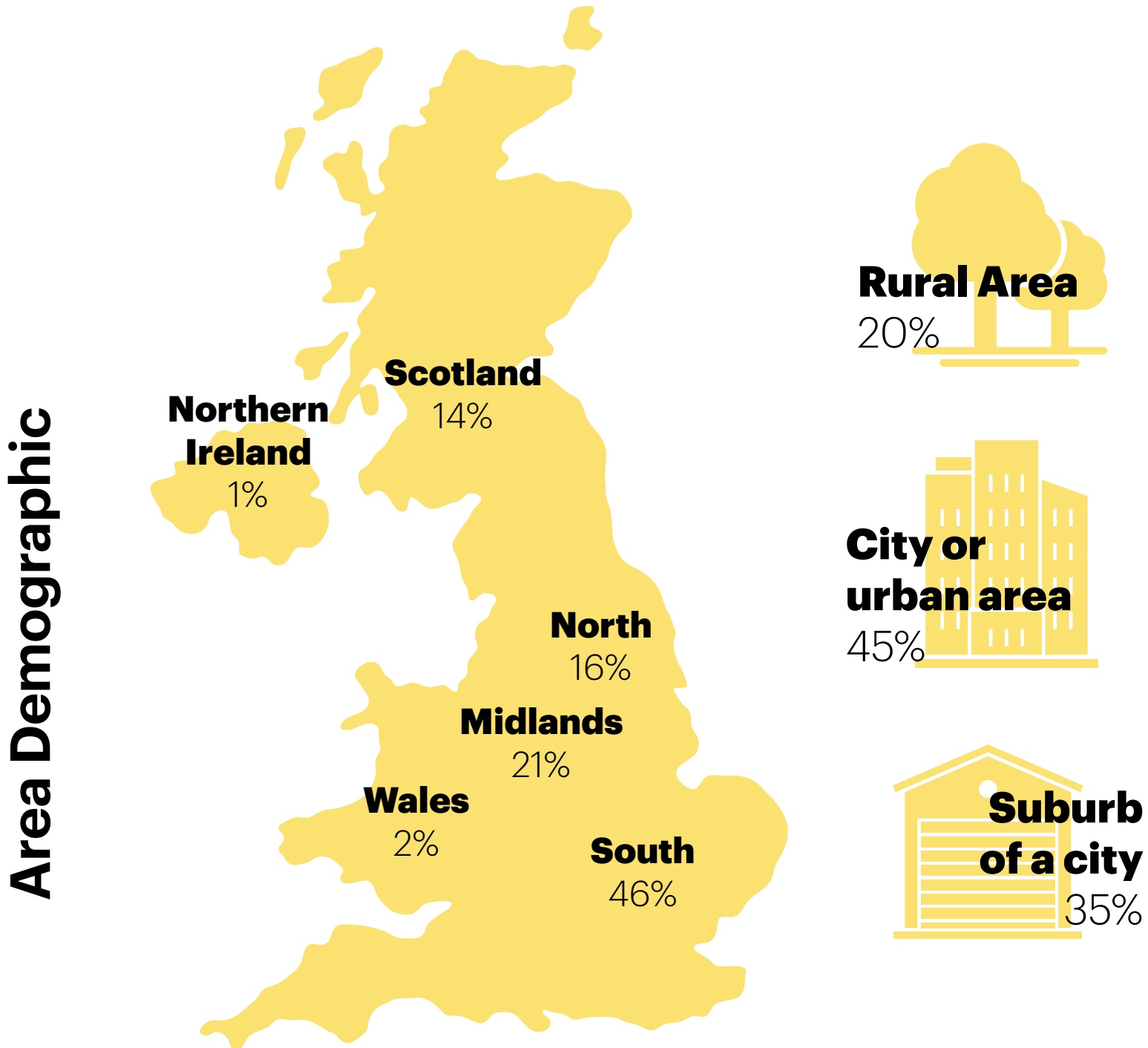
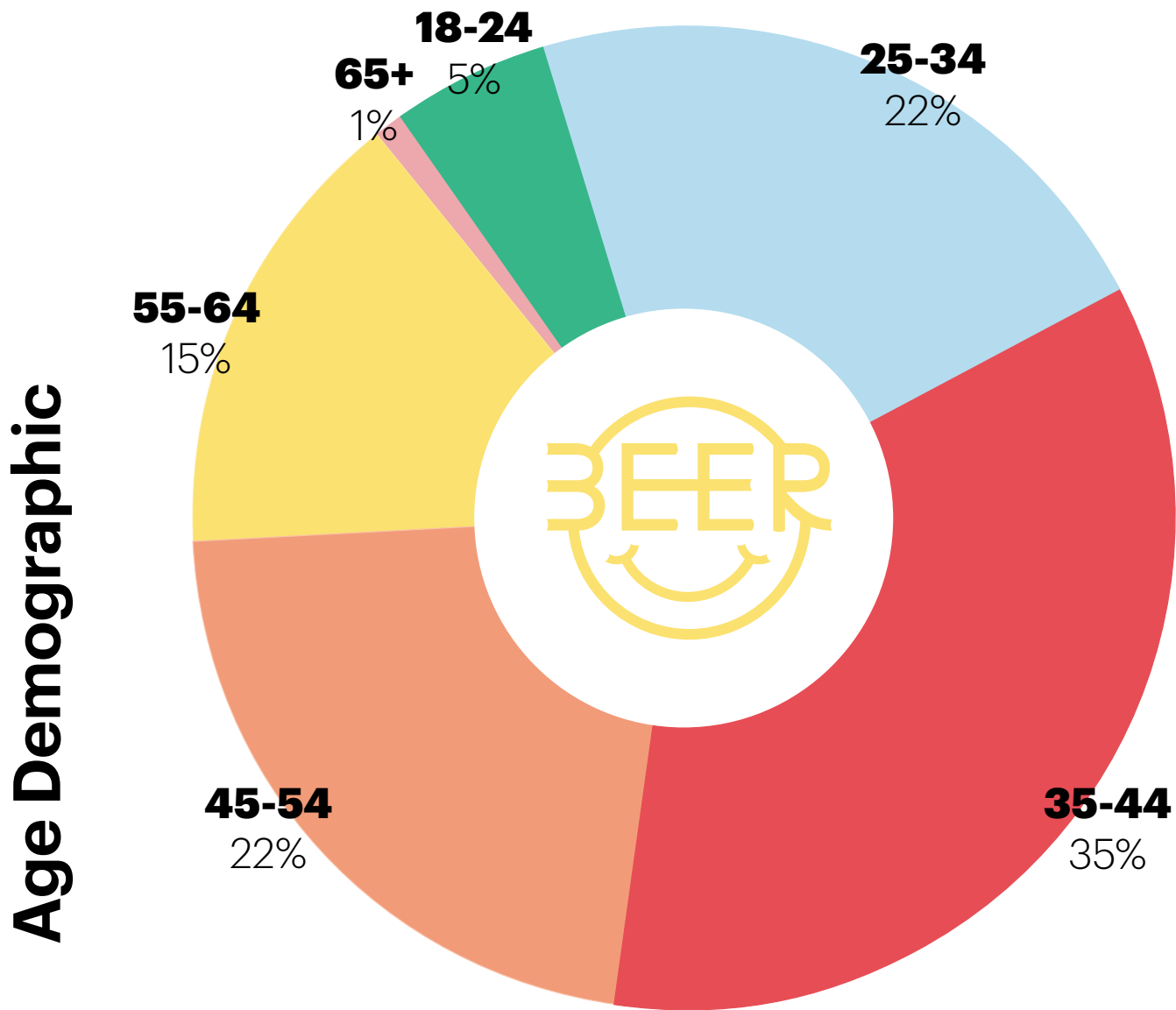
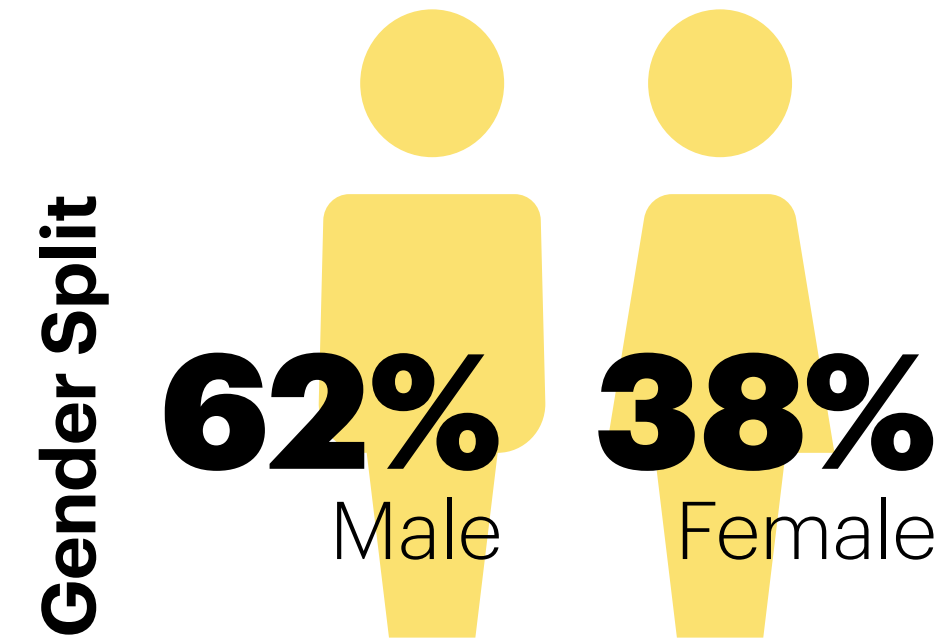


The research was led by:  
**Greg Wells** (We Are Beer co-founder and ex-insight and brand consultant for companies Diageo and adidas)  
**George Byrne** (consultant for Guinness, Heineken)  
**Niall Smith** (Sketchbook Consulting)  
**Imme Ermgassen** (insight partner to Beam Suntory, Heineken, ProperCorn as well as founder of non-alc aperitivo, Botivo).





# WHO WE SPOKE TO:





# ***THE BEER DRINKER TODAY***

The Big Picture





# Our audience are crazy about food and drink



**88%**  
say they're passionate about food and beverage  
(compared to national ave. of 61%)



"Food and drink is pretty much what I spend all my money on. Even my holidays are booked around going to places where there's a brewery, or distillery, or a vineyard."

Beer Geek, 25-55



"I love discovering new restaurants, new bars, new breweries. "

Pleasure Seeker, 25-55

THESE ARE THE CONSUMERS THAT DRIVE THE FOOD AND BEVERAGE CATEGORY



# They're not just beer drinkers - they're food and drink lovers

**3 in 4**  
say eating out and  
finding restaurants is in  
their top hobbies

**52%**  
put cooking  
in their top  
5 past times

**Over half**  
attended food  
festivals in the  
last year

**75%**  
drink wine regularly

**2/3**  
seek out  
travelling for  
food and drink

**Half**  
our audience are regular  
drinkers of whisk(e)y, gin,  
cider or cocktails



*"When I travel, I try and bring back whatever the local spirit is.  
I got some great Mezcal when I went to Mexico"*

Pleasure Seeker, 25-55





# They make the decisions in their social circles when it comes to food and drink

*“When I go out and have an amazing meal, a place that blew my mind, I will tell all my friends and family.”*

Communitier, 25-55

**3 in 4**

say friends always ask them for recommendations in food and drink



*“It feels good recommendation stuff to your friends, especially when they really like it.”*

Beer Geek, 25-55

**72%**

will post on their own social channels about food and drink



**GETTING THEIR ATTENTION IS KEY TO BUILDING YOUR BRAND**



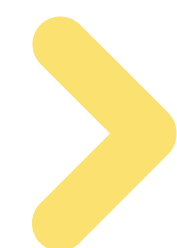
# They're wealthier than the national average and are ready to invest

- **83% are ABC1** (compared to half in UK overall)
- **93%** say it is **always** worth paying more for better quality food and drink
- **More Disposable income** - more urban, less likely to have children than national average



*"If I go out and see a bottle of wine I want to try I'm not really going to worry what it costs. I'm going to want that experience, you've got to treat yourself sometimes."*

*Beer Geek, 25-55*



DESPITE THE WIDER SOCIO- ECONOMIC PICTURE THEY STILL  
BUY INTO THE BEST PRODUCTS AND EXPERIENCES THEY CAN.



# The Big Picture Summary

- The good beer drinker is a leading edge audience
  - passionate
  - influential
  - and ready to invest





# ***THE BEER DRINKER TODAY***

**What's impacting the drinker today?**



**Times are challenging, but now more than ever people want to invest in themselves and meaningful experiences.**

This is being driven by some large socio-economic and cultural forces...

1.

PHYSICAL  
& MENTAL  
WELLBEING

2.

NAVIGATING AN  
INCREASINGLY  
COMPLEX WORLD

3.

SQUEEZED MIDDLE  
CLASS & COST  
OF LIVING



# 1. PHYSICAL AND MENTAL WELLBEING IS INCREASINGLY A TOP PRIORITY

- The stigma over non-alc has reduced greatly and the beer options are now brilliant
- Holistic health and taking care of oneself for a longer life is more important
- Mental health is now an open topic of conversation
  - Mindful drinking is part of that

**1 in 3**

of our audience regularly  
drink non-alcoholic beer



*"I like staying active, it offsets the alcohol consumption. A dad's football session, we always go go to the pub after so I try and balance it that way. I work for my beers."*

Deep Connector, 25-55

➤ IF THE AUDIENCE ARE GOING TO BE DRINKING, THEY WANT TO DRINK BETTER QUALITY AND LOOK FOR RICHER, DEEPER, MORE VALUABLE EXPERIENCES



*"Going out it's not just the food or the drink it's the whole environment. I like places you can relax and chat, it's about a good atmosphere. Good drink is something to connect over, it gives you the opportunity to have conversations."*

*Communitier, 25-55*

*"I'm not an avid go out get smashed guy, but I'm more into flavour experiences."*

*Beer Geek, 25-55*





## 2. THE WORLD AROUND US FEELS MORE VOLATILE AND COMPLEX TO NAVIGATE

- 1 in 3 UK adults experienced high anxiety in 22/23.

\*Mental Health Foundation

- People's horizons have shrunk.  
They're less confident about the future.

*"I've no idea about the future.  
No plans, just just getting through  
every day as it comes."*

Deep Connector, 25-55



*"I think in years gone by people always had these five year plans. Things are so unstable at the moment it's difficult to think about the future, jobs are not what they were, you don't know what's going to happen next. "*

Beer Geek, 25-55

➤ THE RESULT IS THAT PEOPLE ARE LOOKING TO THE 'HERE AND NOW' -  
SOCIAL BONDS AND BRANDS YOU CAN TRUST ARE LIGHTHOUSES IN THE STORM.



### 3. DESPITE BEING MORE AFFLUENT THAN MOST, OUR AUDIENCE IS STILL FEELING THE SQUEEZE.



- **91%** concerned by the cost of living crisis
- Continual economic shocks since 2008 have left people pessimistic about the future
- People feel they're making tough choices about where to spend

*"If I'm going to go out and spend money I want it to be for something new and memorable rather than the same old thing. That's probably what drives us to buy something. You might spend more money on it but do it less frequently"*

Beer Geek, 25-55

*"We're a bit more conscious money wise these days, we might spend more on enjoying ourselves but less often"*

Communiter, 25-55



WHILE PEOPLE ARE HAPPY TO SPEND ON QUALITY FOOD AND DRINK, THEY'RE BUYING LESS OVERALL





# WITH ALL THESE PRESSURES, DRINKERS ARE BEING MORE DISCERNING.

## They want value in the here and now



experiences that are bigger than just consumption for consumption's sake: trying new things, innovative and exciting flavours, origin stories, unique design etc



*"If you go out, you want something different - a new experience that sets it apart"*

Beer Geek, 25-55

## Their bullshit radar is up



They respond to brands that are authentic by staying true to themselves, their passions and values



*"If breweries stick with what they've always done well; if they get bigger it doesn't bother me as long as they keep producing the good bit"*

Beer Geek, 25-55

## Reliability and trust



It's not that creativity and innovation don't resonate but provenance and consistency matter



*"Reliability is a really big one for me, knowing what you can expect, that is definitely part of the quality. I will happily have a big branded beer if I know that it's trustworthy is quite reliable."*

Beer Geek, 25-55

## Shared ethics and values



They want companies that feel invested in the communities they belong to. Just bringing people together can be impactful



*"I'd rather buy more local - the circular economy. Chains have their place but it's not what I want to support most weeks"*

Communteer, 25-55



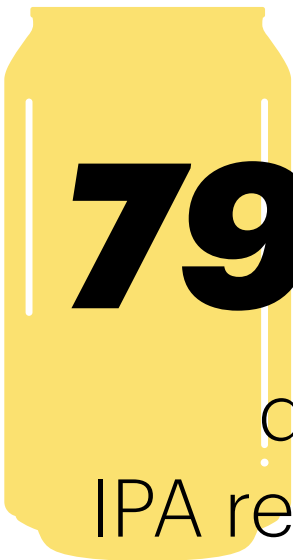
# ***THE BEER DRINKER TODAY***

**Beer Today - what they drink  
and why they love it**



# WHAT OUR AUDIENCE DRINK

## IPA IS STILL THE KING OF CRAFT



79%

drink all  
IPA regularly



2/3

drink Session  
IPA regularly



31% of all styles  
poured at the festival

53%  
including pales ales

IPA underpins the biggest brands  
that cut through to our audience

- BrewDog / Beavertown currently have greatest cut through
- Followed by next wave: Northern Monk, Verdant, Cloudwater, DEYA
- Most favored style of beer on We Are Beer festival app



### Haze for Daze

Hazy is really established in people's repertoire

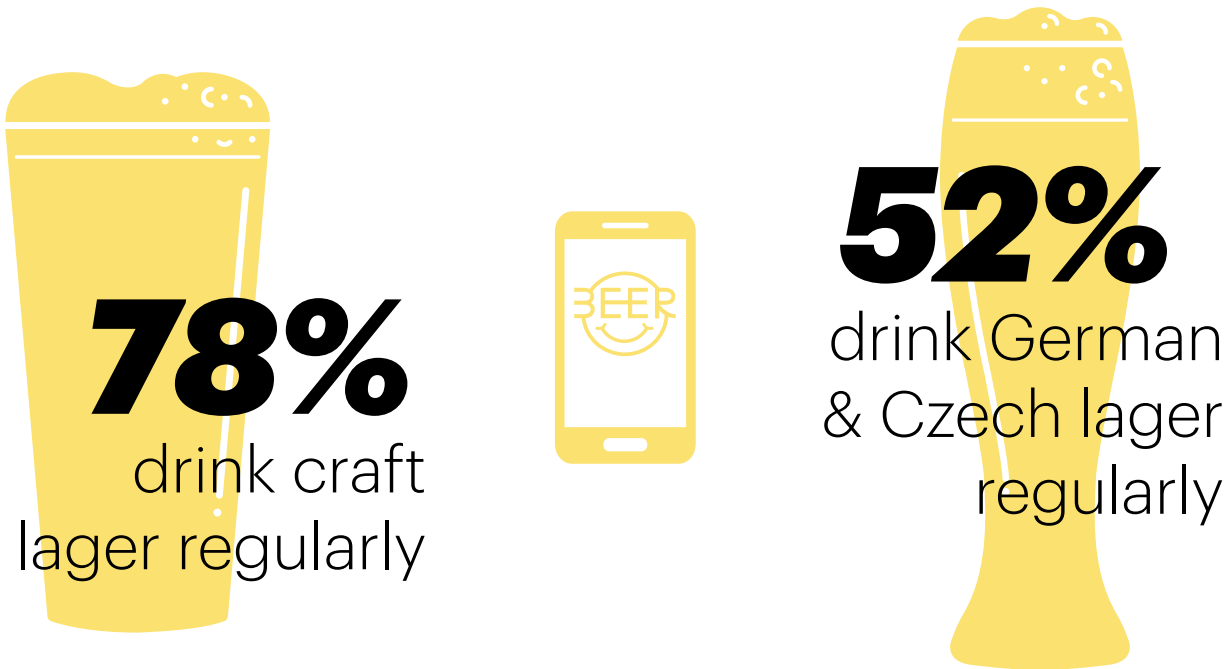
70% of audience regularly drink Hazy Pales  
and 60% regularly drink NEIPA





# WHAT OUR AUDIENCE DRINK

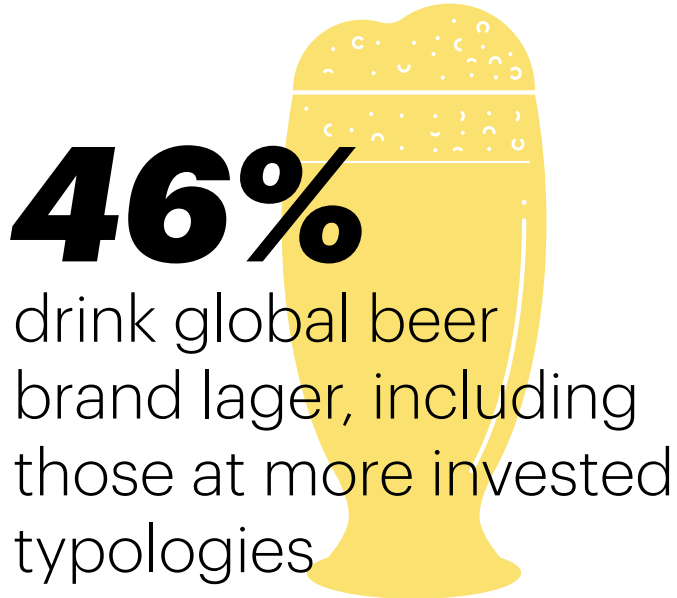
## LAGER, THE LONG-LASTING LOVE



**52%**  
drink German  
& Czech lager  
regularly

Overall, lager still claims top spot in terms of regular consumption and volume

- We had 120 different lagers pour at our festival in 2023
- The most “favourited lagers” amongst our more experiemental audiences were fruited, dark or smoked.







# WHAT OUR AUDIENCE DRINK

## A WIDE AND VARIED REPERTOIRE



Sour and fruity is growing fast and is really engaging. Just under half our audience drink sour beer regularly

- In 2022, 8 of top 20 most “favourited” beers on our app were sours
- Vault City really captured the Zeitgeist through their championing of modern sour beer - Highest rated and most favourited beers in 2022
- Alongside Tiny Rebel the only non-IPA focussed brewery to make top 8 favourite breweries
- Chouffe Cherry, Timmermans and Haacht Super 8 Cherry all featured on We Are Beer app top starred beers



**1 in 2**  
regular drinkers of Cask, the same as regularly drink porter / stouts

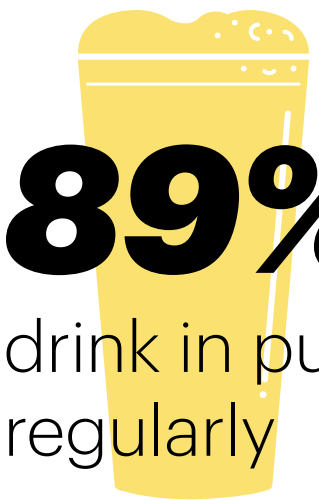
**1 in 3**  
regular drinkers of Belgian and other specialist styles like saisons





WHERE OUR AUDIENCE DRINK

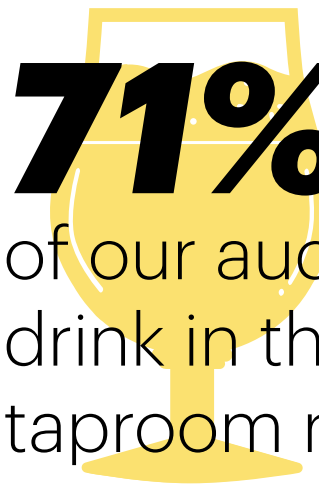
**ON-TRADE IS WHERE THE BEER EXPERIENCE IS WRIT-LARGE**



**89%**  
drink in pubs  
regularly



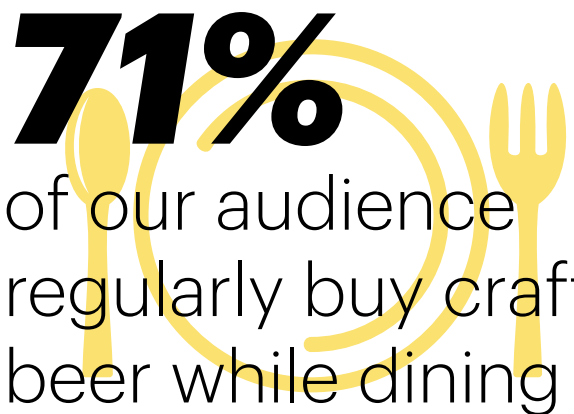
A good beer selection signifies a good pub



**71%**  
of our audience  
drink in the  
taproom regularly



- Half of all craft drinkers regularly visit taprooms
- Big drivers of the craft experience - community, discovery, knowledge
  - Established as community hubs



**71%**  
of our audience  
regularly buy craft  
beer while dining out



Appreciative that even though limited on choice, restaurants have “good beer” now



INVESTING IN TAPROOMS IS INCREASINGLY IMPORTANT - THEY’RE REAL COMMUNITY HUBS

“Beer is our number 1 wet led product. We want to have a menu that shows we take it seriously and we care about good beer”

Liam Davy, Hawksmoor Group



“For us it’s all about the ambiance and environment that good beer is a part of. From the staff and what they’re passionate about, to layout and design of pub, to a selection of great beer”

Anselm Chatwin, Graceland Bars





*"I've had experiences where you walk into a tap room or a brewery and you can just feel the atmosphere in the air, it's electric almost sometimes."*

*Communiter, 25-55*

*"The experience of going to a pub where you don't know what you're going to have because they've got so many good things to choose from is so completely different to a place with one Pale Ale that you want to drink, or even worse selections where you are just taking the least bad pint they've got."*

*Beer Geek, 25-55*



## WHERE OUR AUDIENCE DRINK **AT HOME CONSUMPTION CENTRES AROUND FOOD**

Widespread availability of good beer is opening it up to everyday occasions

**74%**

buy beer regularly from supermarkets

**47%**

buy beer in specialist off trade

**34%**

buy beer from corner shops

**31%**

buy beer from online retailers

For the more invested profiles, there is a lot of warmth for specialist outlets. They offer:

- Expertise: Places of discovery
- Belonging / connection: Community hubs that bring people together
- But price is a downside

**Food plays an important role in at home consumption**

- 2 out of 3 drink beer with food at home, the third most regular beer occasion
- During summer 59% regularly consumer craft at BBQs and picnics

"I love picking up a few cans from my local bottleshop afterwork - especially when I'm cooking. The guys there know what I like"

Beer Geek, 25-55

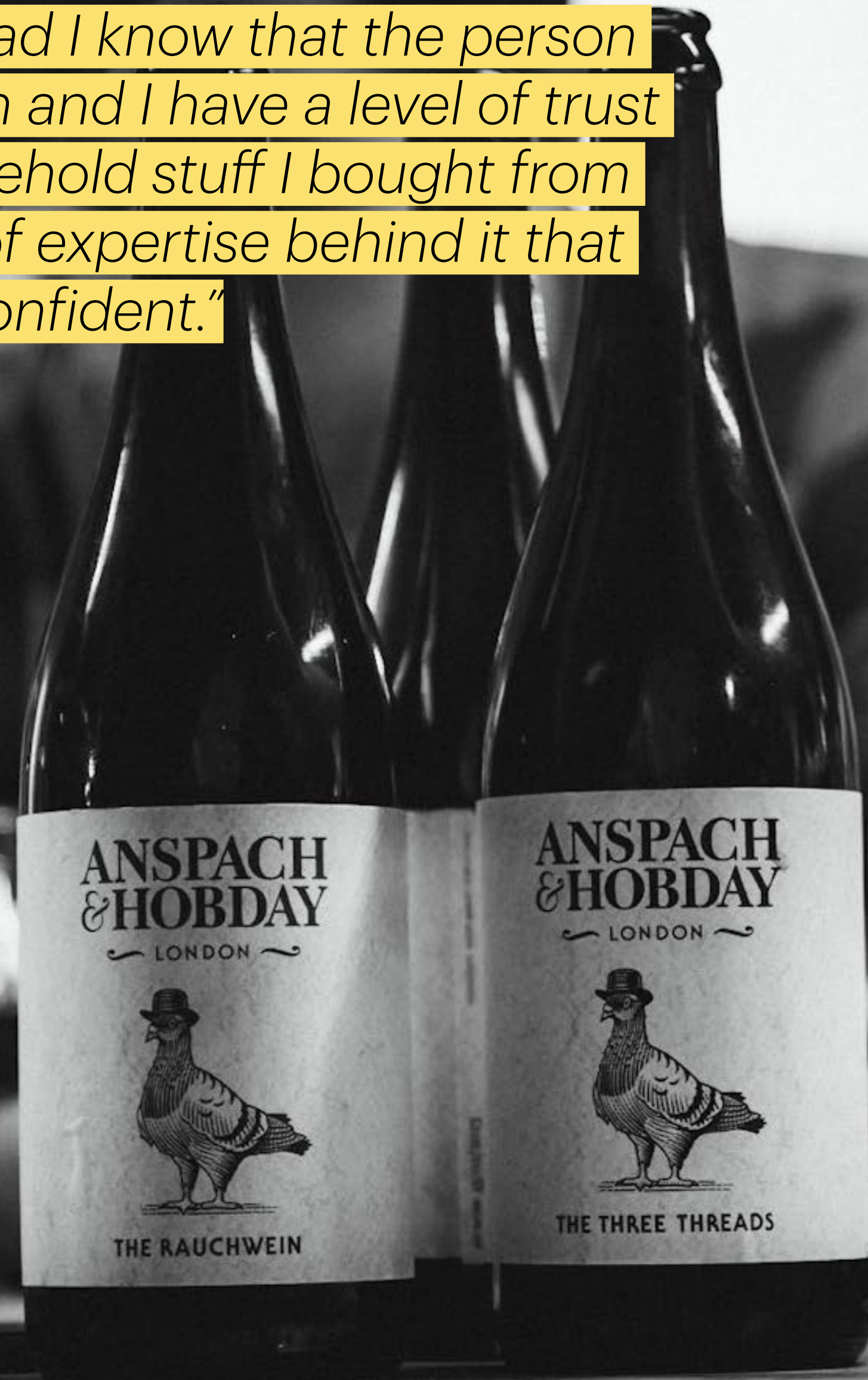


**A NEED TO TAP INTO THEIR WIDER PASSIONS AROUND FOOD.**



*"You learn from bottle shops. There's so many breweries and so many styles, and you don't know what's good, bad or indifferent. Whereas if I walk into the nice bottle shop down the road I know that the person who owns that shop has picked the selection and I have a level of trust in their choice. Much like if I'm buying household stuff I bought from John Lewis. The bottle shop has that level of expertise behind it that that makes me feel more confident."*

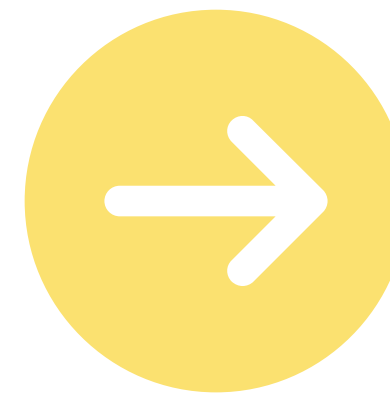
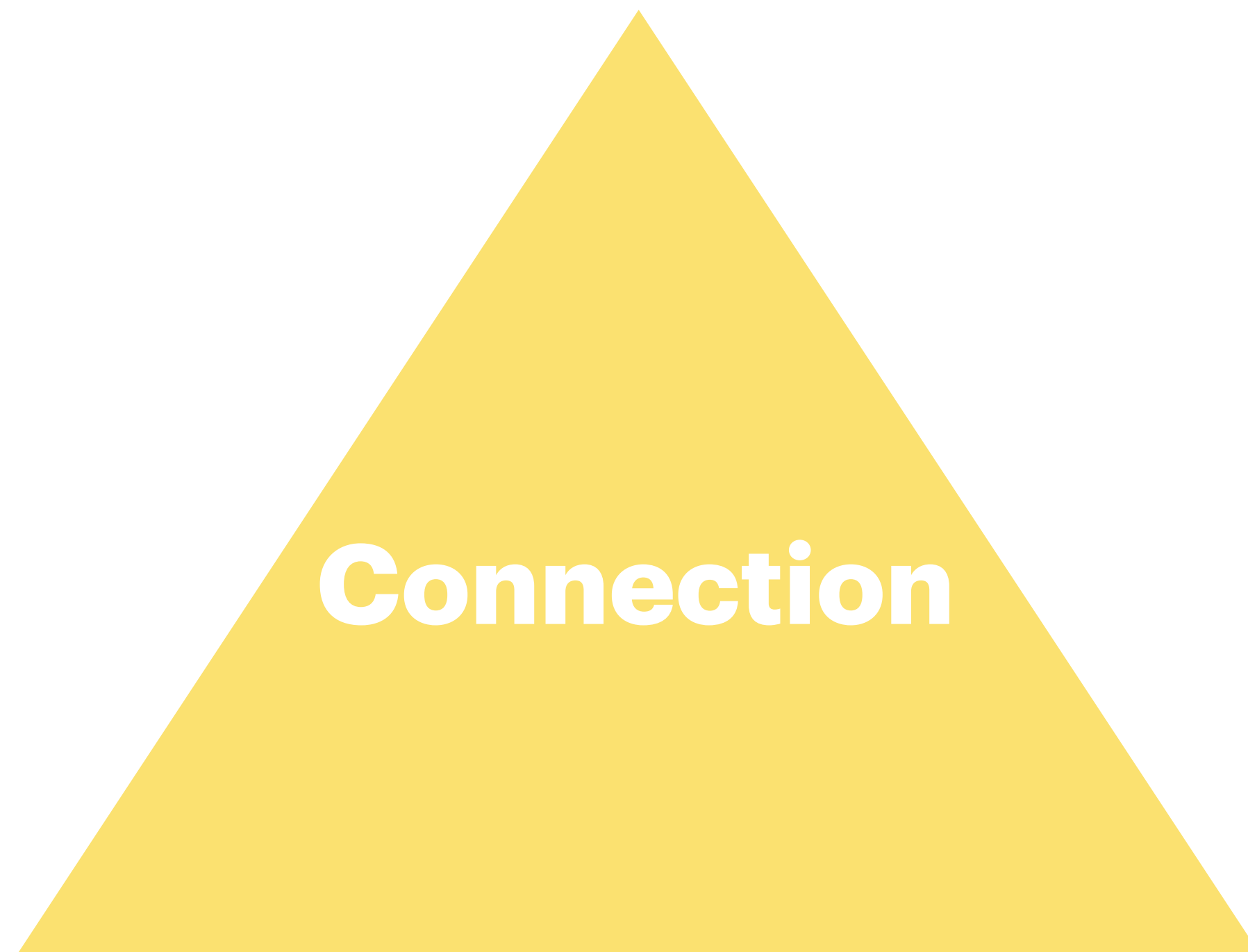
*Pleasure Seeker, 25-55*



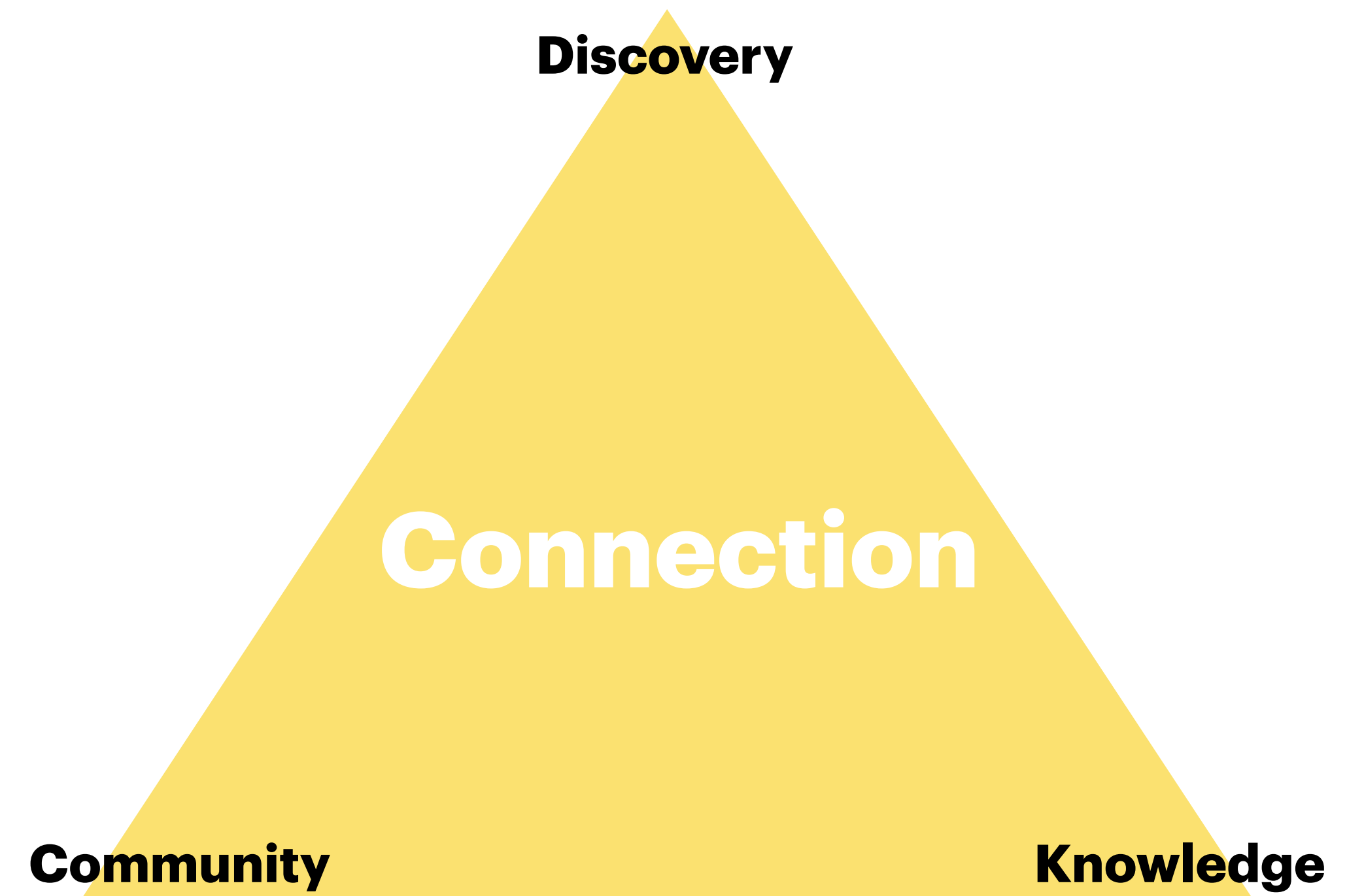


# Beer is a social connector - core equity and really powerful today

## BEER



## GOOD BEER



These dimensions are what people love about good beer. There aren't many things in food and drink or culture at large that can deliver this, especially in a way that feels open and accessible.



## Discovery

craft was big bang moment for beer,  
a near infinite universe to discover

**89%** love trying new beers and  
breweries

**Only 7%** said they don't to  
experiment

In 2023 we had **941** different  
beers pour at 3 festivals

*"There is just such breadth of styles  
that are out there, there's just loads to  
discover, like pastry sours are quite a  
new thing yet there's still reams and  
reams and reams of them out there.  
You can go head first into it and go  
down the rabbit hole."*

Beer Geek, 25-55

## Community

locality and provenance drive the  
appeal. The expansion from beer  
brands to breweries, taprooms, people,  
stories, bottle shops

**72%** claim to prefer buying local brands  
over national brands

**Eight out of ten people** in the UK  
believe that a well-run independent  
brewery has a positive effect on its local  
community\*

**56%** actively feel part of a community of  
beer enthusiasts

*"I'm in women's beer drinking whatsapp  
group. The Craft Beer Girls, encouraging  
women to get more involved in beer. We do  
a social meet up once a month to talk about  
beer but other stuff as well, like football."*

Communiter, 25-55

## Knowledge

People like to know the story behind  
what they're consuming

**91%** love *learning* about new craft  
beers and brewers

**46%** love researching the process of  
beers and the history of breweries and

**2 out of 3** say beer connects them to  
different cultures around the world

*"I fell in love with Belgian beer after a  
holiday and got dragged around a brewery.  
Mainly I like lager but I really found out a lot  
and now I love a Belgian beer"*

Deep Connector, 22-55



# ***THE BEER DRINKER TODAY***

**Why experience matters and  
the role of festivals**



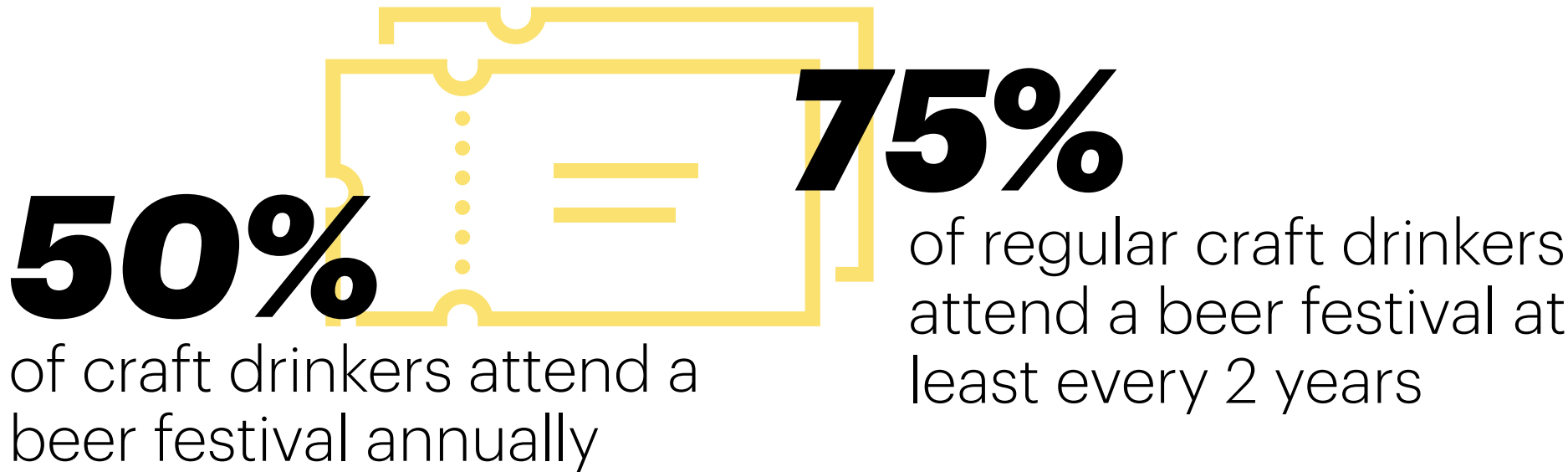
Supermarket shelves and above the line advertising alone don't cut it with the good beer consumer.

Impactful experiences frame their preferences, choices and conversations.

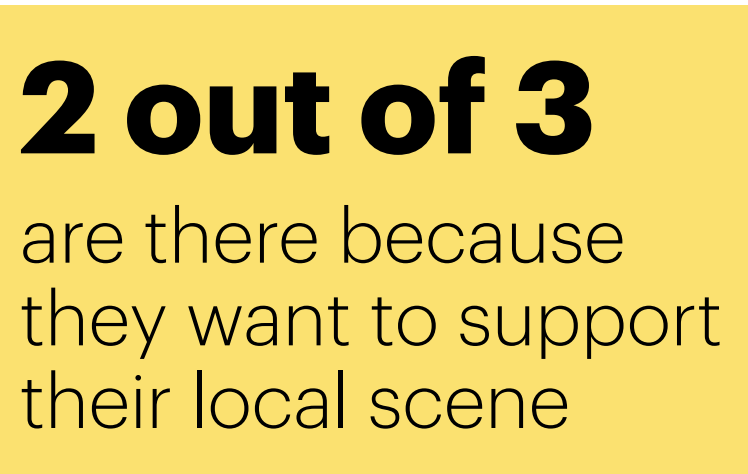
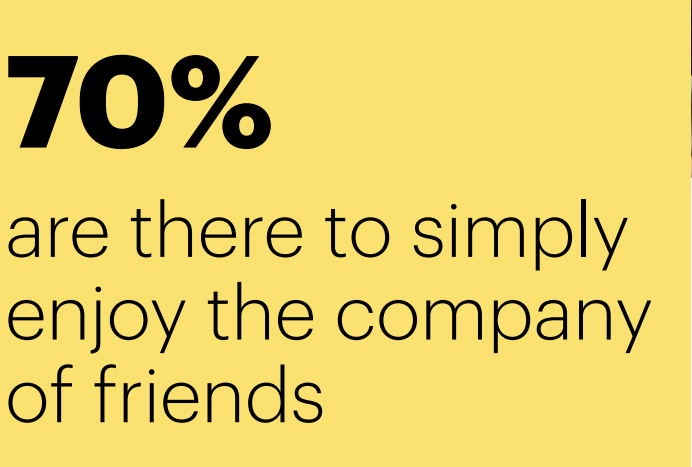




# Festivals are a powerful way to connect with good beer drinker and deliver discovery, knowledge and community



## The reasons they attend:





*"I think a lot of it is about the atmosphere. I like places where I can have a conversation. And because craft beer tends to be that little bit more expensive it does draw a certain crowd.. It does create have a bit of a calmer atmosphere, which is what I prefer on on a night out now."*

*Pleasure Seeker, 25-55*





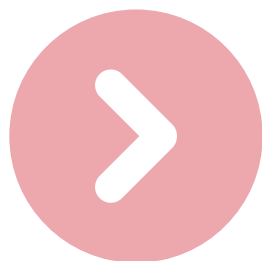
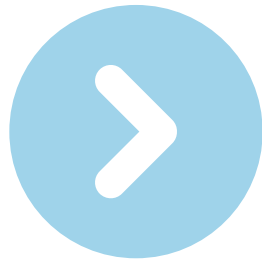
# ***THE FIVE PROFILES***

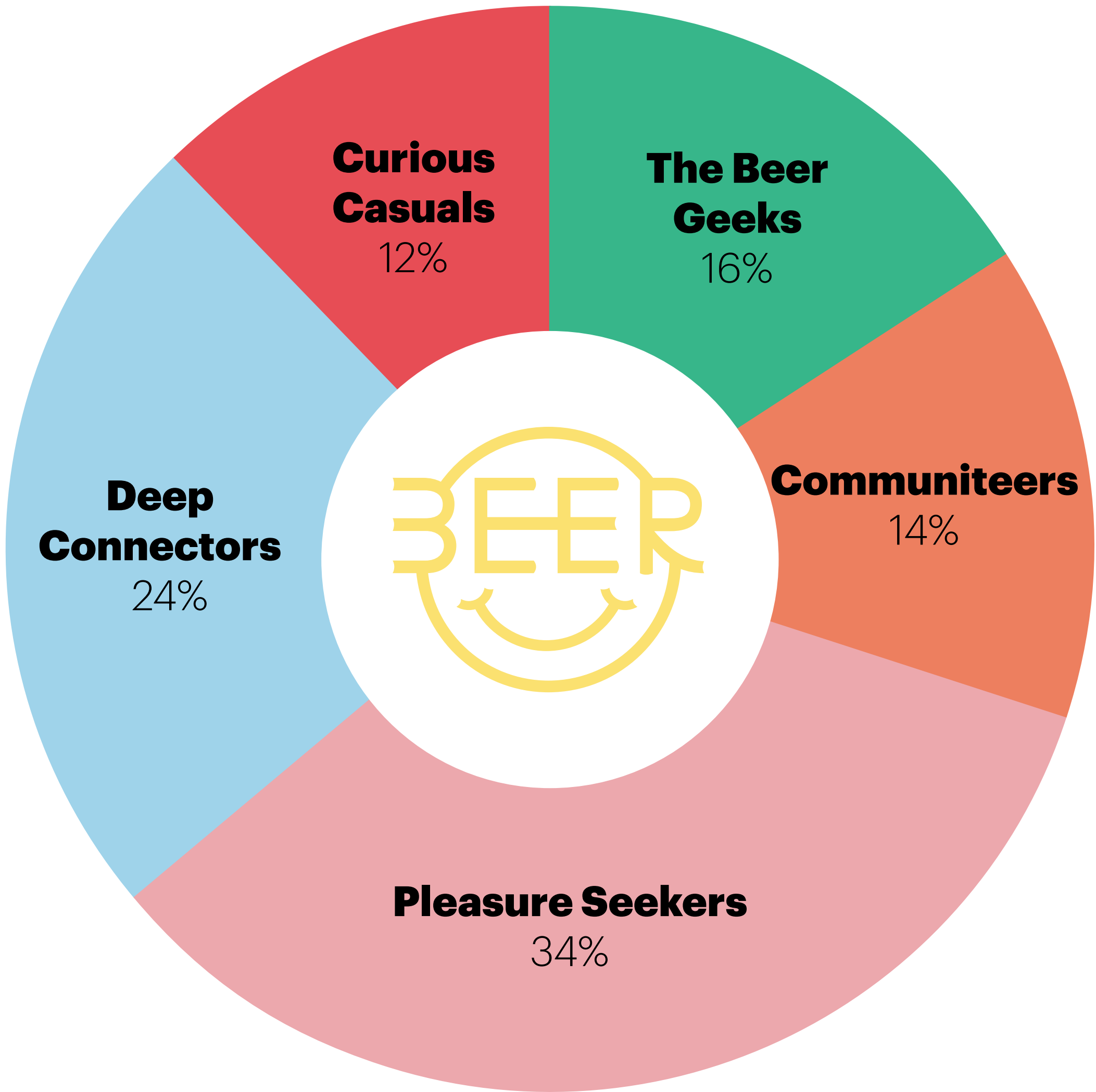




# The Good Beer Drinker '23

## 5 Distinct Drinker Profiles

-  **Pleasure Seekers**  
High-Fidelity Allstars
-  **Deep Connectors**  
Better beer, better conversations
-  **The Beer Geeks**  
The Joy of searching for excellence
-  **Communteers**  
The warm heart of communion
-  **Curious Casuals**  
Surfing the trends





***PLEASURE SEEKER***



# Pleasure Seeker

Hi-Fidelity Allstars

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

On gender they match  
We Are Beer norm -  
37% identify female

**63%** Male

Skew younger than other  
groups - hotspot is 25-35

**37%** Female

Size of  
audience:  
**34%\***



*"I like creativity, something unexpected, if I see something on a menu that I wouldn't expect to go well together. I like to try that. It's the same with beers, I'm always looking for new flavours, something that's slightly different"*



## > They're seeking fun and thrills - look for surprise and delight moments

- They look for new and novelty
- They're active planners, and highly social
- Segment least interested in news, politics and history



*"I love the Get Your Guide app. I found that when I'm travelling as a platform it provides smaller, maybe family run businesses and experiences that wouldn't necessarily have the budget or ability to market through the bigger tourist companies."*

*Pleasure Seeker, 25-55*



*We went to Barcelona a couple years ago and I went on a few forums and looked on Instagram for inspiration. We were only there for three days but it's worth doing some research to find specific places that are probably slightly off the beaten track.*

*Pleasure Seeker, 25-55*



## > All about distinctive flavours and brands

- Respond to the discovery trend driving a lot of f&b culture
- Enjoy “ticking off restaurants”
- Brands that resonate deliver high energy, fun experiences

*It's something to talk about, isn't it? When you sit around the table in the pub, it's like, oh, did you try that ridiculous donut beer that they had on?"*

*Pleasure Seeker, 25-55*



*"Beer should just be fun. I'm not looking for beer to do politics"*

*Pleasure Seeker, 25-55*



> Beer represents a whole universe to explore and enjoy

More than any other drink, beer offers a never ending world to explore

- **Brand led** - want bold, colourful, modern brands
- **Beer newcomers** - lightbulb moment “I never knew beer could taste like this”

91%

love learning and discovering new flavours

60%

prefer the exotic flavours in beer over traditional

“Quite often you’ll get a dud and you’ll pay a pretty premium for it, which hurts a little bit but I would rather do that and just try weird new things and discover crazy combinations. I really love the discovery side of it, I just got a kick out of it.”

Pleasure Seeker, 25-55

“I’m drinking a Magic Rock rhubarb cheesecake, pastry sour. It’s a talking point, isn’t it?”

Pleasure Seeker, 25-55





> Love of discovery means they enjoy high-energy places with lots of choice

- Enjoy the choice and vibe of taprooms and craft beer bars
- Festivals are a place to get lost in flavour
- They love travel and finding breweries

*"I've had loads of really good times with my friends in BrewDog bars, so when I see their beer on the shelf, I am reminded of those experiences"*

*Pleasure Seeker, 25-55*

*Whenever we go on a city break somewhere we make a google map and plot out all of the craft beer places, not to make the trip revolve around it but just so that when we want a break, it was very easy to pull something up and go, this is only like half a mile down the road, let's stop in.*

*Beer Geek, 25-55*







THEY WANT TO BE SURPRISED AND  
ARE WILLING TO EXPERIMENT

*"My local BrewDog has 12 Guest taps and they change them every three days or so. I had a really good lemon and blueberry cheesecake sour the other week which was amazing."*

*Pleasure Seeker, 25-55*



## > They like full-throttle flavours: Hazy IPAs and Sours cut through

- Tiny Rebel and Vault City cut through as playfully avant-garde

They enjoy bold with a strong personality:

- BrewDog and Northern Monk - bold brands with a big range
- These brands have a sense of humour that speaks to them



**Higher ABV**  
Happy to drink more specialist styles as tend to have more flavour impact

*"I've started like recognise some breweries that are particularly good at doing like weird, outrageous stuff in a way that you can kind of trust that like if it says it's going to be a marshmallow Biscoff coffee stout with whipped cream it will really taste like that"*

*Pleasure Seeker, 25-55*





➤ Social media captures attention.  
But they're consumers not sharers

Not as influential as other beer-forward profiles

**Only 15%**  
post on beer  
more than  
once a month

"I get sucked in by can launches on  
instagram - stuff looks great and just  
makes me want to try it."

Pleasure Seeker, 25-55



"I've had some good beer boxes ordered from social media -  
they do a different theme each month"

Pleasure Seeker, 25-55





# How to connect with Pleasure Seekers

## Brand & Marketing

- Communicate what your beers will be like to experience
  - over process or brewery story
- Enjoy novel collaborations
  - with breweries or other producers
- Bold personality and tone of voice
- Utilise bold, bright social media comms focussed on product experience

## Sales channel / occasions

- Be in places of discovery
  - extensive tap list (over curated), mixed tasting boxes, flights
- Appear in high energy bars and environments over quieter, more considered side of craft
- Promote your beer / taproom experiences via tourist / culture listings media

## Product and portfolio

- They're going to connect with the more innovative parts of the portfolio
- Be flavour led - interesting use of ingredients and combinations
  - use food to inspire





# FESTIVAL CHEAT SHEET

If you're all about discovery and experimentation then there is no better spot to go explore.



- Make sure you're coming with as many different beers as you can
- Excite before hand with launches around specials
- Think about serves, garnishes, novelty, on bar pairings - activate and engage on flavour experience
- They enjoy the hi-fidelity, bold brands, so spaces need to attract them
- Are there special collaborations you can drop or work with another brewery to create something unique
- Do blind tastings / tutored tastings at the bar - focus on the boldest beers



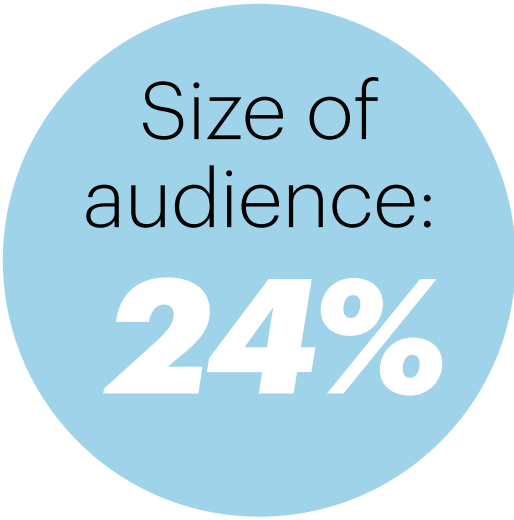
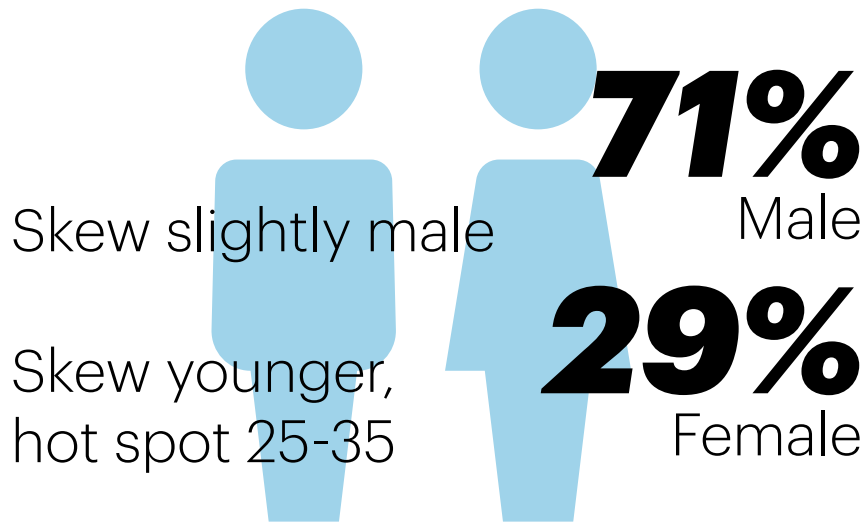
# ***DEEP CONNECTORS***



# Deep Connectors

Better beer, better conversations

➤ Motivated by moments amongst friends - better beer brings better moments



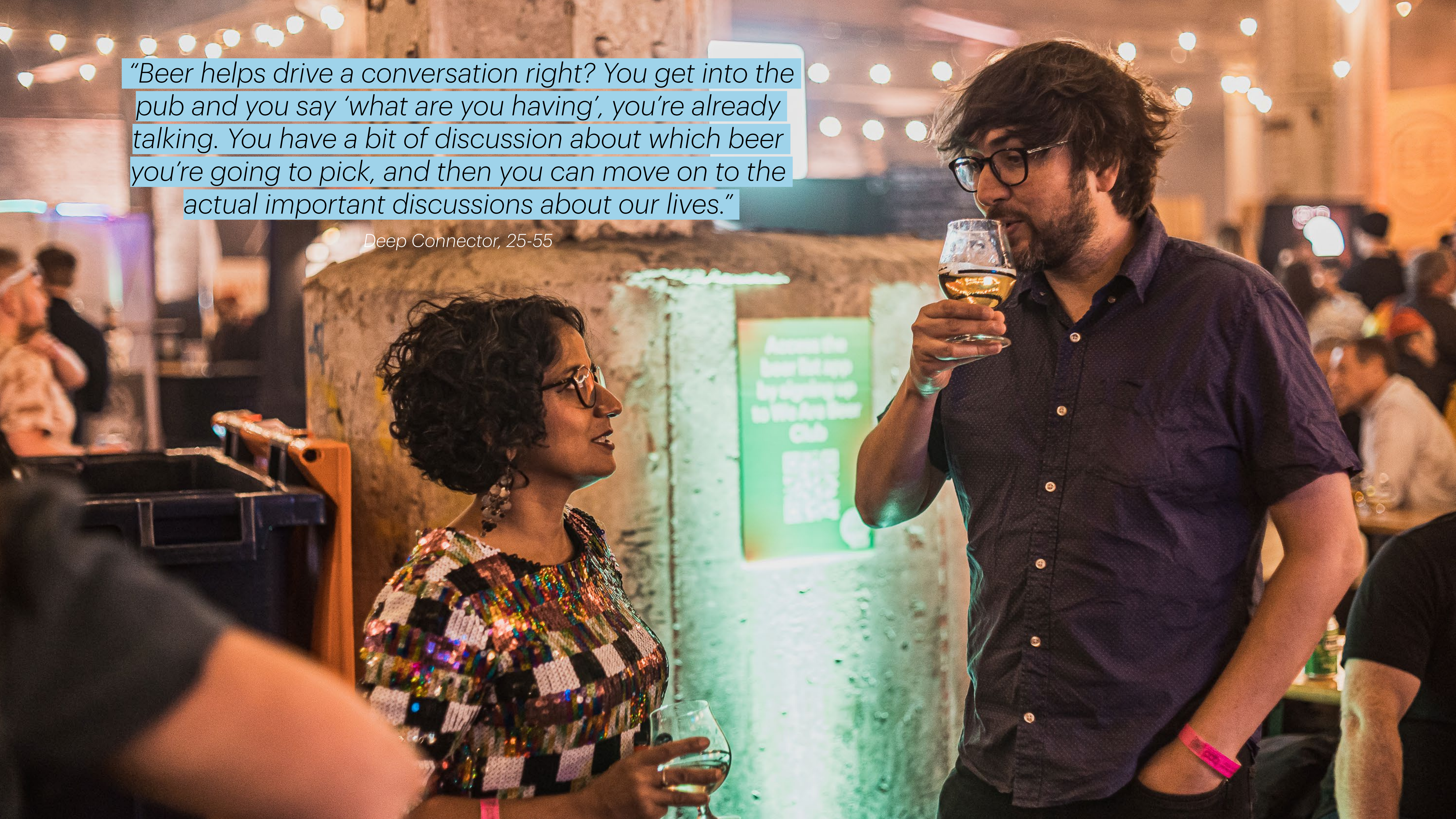
*"I go to beer festivals because I'm gonna have a good conversation with my brothers. We will touch upon the beer briefly but I go because it's all about a good day out with them."*

Deep Connector, 25-55



*"Beer helps drive a conversation right? You get into the pub and you say 'what are you having', you're already talking. You have a bit of discussion about which beer you're going to pick, and then you can move on to the actual important discussions about our lives."*

*Deep Connector, 25-55*





## > Deep Connectors have more of a traditional beer drinker mindset

- Good beer is a symbol of good conversation and more meaningful connections; more about having a few pints with friends than the beer itself
- Big group for our business and the category discovery, knowledge and community does not cut through like it does for Beer Geeks, Communiters and Pleasure Seekers
- Craft has to compete with whole category for this audience



"I like better beer, but some people go bonkers about it and start talking about yeast types and what flavour hops they used. I quite like the flavour, that's the kind of detail I want to get into. For me it's about more the social aspect and relaxing."

Deep Connector, 25-55



## > Beer has always been a cornerstone of their social life

- **Important** - the medium which they connect with close friends and family
- **Accessible** - simple luxury, unpretentious
- **A reward** - open that beers with mates are either a reward or momentary escape from pressure of life



*"I've always been into good beer, before craft, really going back to drinking with my Dad. We'd always look for good pubs with good beer. That's the kind of beer I like today too."*

*Deep Connector, 25-55*

*"My wife and I we have a glass of beer on an evening after a difficult day at work. If the weather's nice we can go sit out on the patio and watch the kids play."*

*Deep Connector, 25-55*





> Identify less as “craft beer fans” than “beer fans”

But they’re quite protective over what good beer is and are less likely to be impressed by novelty

- Beer is their go-to, and they’re more likely to choose beer than any other profile at music festivals, late night places or restaurants



**2 out of 3**  
prefer traditional  
flavours in beer



Only **1 in 3**  
say they enjoy  
researching breweries



Least likely to give  
recommendations

**More than half** will  
never post about beer  
Less likely than other  
segment to follow  
beer influencers

“I think the term craft beer has become a bit of marketing rather than any description of a kind of beer. It’s been robbed of all meaning, except to say we’ve loaded the prices.”

Deep Connector, 25-55



“I like tradition, you know old pubs with wood panelling, they’re the kinds of beer brands I go for.”

Deep Connector, 25-55



BEER BRANDS

➤ Driven by what they consider to be a “good pint” focused on session beers - particularly lagers and session ales

- Big craft cuts through - brands like Beavertown, Camden Town, BrewDog and Brooklyn
- Also brands that focus on consistent, readily available core range; Thornbridge, Lost & Grounded, Siren etc



85%  
drink craft  
lager regularly

2 in 3  
drink SIPA  
regularly

55%  
regularly drink  
global brands





> They experiment far less frequently,  
sticking with what they know and love

They're less regular drinkers of specialist styles, if at all,  
especially those furthest away from lager and ale.

- 50% will drink Hazy pales - this is category they'll experiment in
- Our beer app data shows newer beer brands cut through to; Northern Monk 'Faith' and DEYA 'Steady Rolling Man'

**only 39%**  
have Cask in their  
repertoire, same  
with stouts / porters

**Only 1 in 4**  
claim to occasionally  
drink sour

**Only 1 in 3**  
have specialist IPA - like  
New England or Double -  
as an occasional choice



"I don't have the fruity stuff or anything that's  
overly fancy. Anything that tastes like grapefruit or  
looks like a pint of piss I don't particularly want to  
drink it. I want it to look brown."

Deep Connector, 25-55







Most likely to buy a couple of 4-packs of Beavertown Neck Oil to bring a BBQ



*"The fancy flavours I'm not that bothered."*

Deep Connector, 25-55



# > Craft specialist retail and occasions don't cut through as much with this group

## Pub is number 1 on trade outlet

- Only 48% visited a taproom this summer (vs 78% on other segments)
- Taproom Frequency is around once per year

## Driven by convenience and price - off trade purchasing is supermarket and convenience stores

- More driven by a favourite they have in stock than place of discovery

"I tend to just buy beer locally because it's convenient. Most local shops have small selection of beer and supermarkets have a reasonable level too."

Deep Connector, 25-55

**Less than 1 in 3**  
regularly shop in  
specialist off-licenses





# How to connect with Deep Connectors

## Brand & Marketing

- They're creatures of habit so brand recognition is really important to becoming one of their beers
- Celebrate the perfect pint
  - Do not be too kitsch or novelty if you want to build loyalty

## Sales channel / occasions

- They're unlikely to search you out, so access is key to being part of their repertoire - regular lines etc
- If opening up retail - look toward pubs rather than taprooms
- Off-trade focus on outlets of convenience and keen pricing over speciality and brand led
- Focus DTC on core range, good deals, and social occasions like friends round for dinner, BBQs

## Product and portfolio

- Primarily lagers and drier pales are going to connect with this group and under 5% ABV
- Do not try to push them into specialist styles or experimental beers - can be a big turn off





# FESTIVAL CHEAT SHEET

beer festivals are a place to get a group together and have a good time

- 81% say the primary reason they attend is to enjoy the company of friends



- Hero the beers they know
- Focus on sessionable styles
- Create environments or things for their group of friends to enjoy, not about process or education
  - Only 5% are interested in learning about the process
  - Chouffe Hats and Phantom T-shirts
  - Big Drop Games
- They're more beer led than brewery led
  - Only 1 in 4 are interested in meeting people behind the brands
- Make accessing that beer after the festival easy - things to take away and remember your beer by, links to retail deals



***THE BEER GEEK***



# The Beer Geeks

The Joy of searching for excellence

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

Size of audience:

**16%**

*"As you get older your tolerance for mediocrity diminishes, you realise that your time and your money is limited, and therefore you want to make use of it in the best way possible. Your leisure time is more valuable than maybe it was when you were younger. So you want to have the best possible experiences."*

Beer Geek, 25-55





A photograph of three men at what appears to be a beer festival or brewery. The man in the center, with long hair tied back and a beard, is wearing a black t-shirt and an orange wristband, and is gesturing with his hands while speaking. To his left, another man with a beard and a black t-shirt is listening. To the right, a third man in a blue t-shirt is holding a glass of beer. The background shows a brick wall and industrial-style shelving.

*"There's a lot of shit out there. We're all going on about how much great beer there is but there's an awful lot of dross and there's nothing more disappointing than spending your hard earned money on beer and it being absolutely middle of the road IPA. I'll do anything to swerve that, and if it means more time and effort and then I'm prepared to do that."*

*Beer Geek, 25-55*



DEMOGRAPHIC

> Our wealthiest,  
most male category

 **89%**  
of profile  
identify as male

 **Highest %** of  
senior and middle  
management vs  
other segments

Amongst lowest  
representation in  
under 35s

Most likely  
to shop in premium  
groceries - M&S  
and Waitrose



*"I've got a reasonably good job, my wife's got an excellent job, we don't have kids. We're not flush but we've got a reasonable amount of disposable income. It doesn't mean we just don't care what we spend less but we want a great experience."*



> As people, they're obsessed by knowledge: consuming information fuels their passions

69% love researching the process and history their beer choices



The group most interested in news, current affairs, history and politics



*"I like buying one nice thing. Like one nice chef's knife, something that is going to last me forever, it might be 10 times the price but I never have to buy ever again. One kitchen knife, but Damascus steel."*

Beer Geek, 25-55

*"I'm really into cycling. I spent a lot on my road bike. I go away regularly with my friend cycling in France. We'll research routes - often stopping via some nice vineyards."*

Beer Geek, 25-55





> They're status driven -  
like to share their knowledge



94%

describe themselves  
as passionate about  
food and drink

84%

say friends often ask  
them for food and drink  
recommendations

Other beverages they enjoy offer  
similar worlds of knowledge and  
status - whisk(e)y and wine



*"Food and drink stimulates conversation, it gives you some social powers, it's a sort of like storytelling, sharing experiences and making you feel like you've got a connection with people."*

Beer Geek, 25-55

*"I like sharing things I discover with my mates. If I go to a new bottle shop I buy the beer that I really like for myself but I always buy a new product every time to try. When I'm next out with the people that I meet up with I can say try this, I think it's really good because of x and y."*

Beer Geek, 25-55





## > Their relationship with beer is driven by this thirst for knowledge

- 96% say love learning about new beers, breweries and flavours
- They're product and process obsessives: 69% say they love researching the processes behind styles and histories behind breweries
- Discovery is product knowledge based - diving deep into a style





## > First movers in the craft revolution and have the most varied repertoire

- Over half have been drinking craft for over 10 years
- Collectors mindset - regular drinkers of biggest variety of beer styles
- Enjoy specialist styles - big flavours, higher ABV and exclusivity. Like Double IPA or Belgian
- Their history with beer is important to them

"I go through phases of being massively into something. I'll drink nothing but that style and then I'll move on to something else. Right now it's Belgium, all I want to drink is doubles and triples, that's it, nothing else interests me."

Beer Geek, 25-55

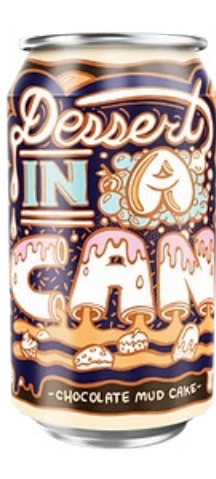


> THEY'RE MOST LIKELY TO BUY THAT SPECIAL RELEASE TO SHARE WITH FRIENDS



> Change to “Desire for “the best” means brands with an expert singular offer cut through

- Verdant - hops, Burning Sky - saisons, Amunsen - Pastry Stouts etc
- Of the higher penetration brands, Northern Monk with focus on “series” they can get into



“If you’re going to buy a hazy IPA from Verdant it’s going to be pretty much at the top drawer, because that’s what they do.”

Beer Geek, 25-55



“I like breweries like Burning Sky that have their own style. They’re brewing one type of beer that they make really well, rather than, 50 different styles. That’s what’s interesting about them”

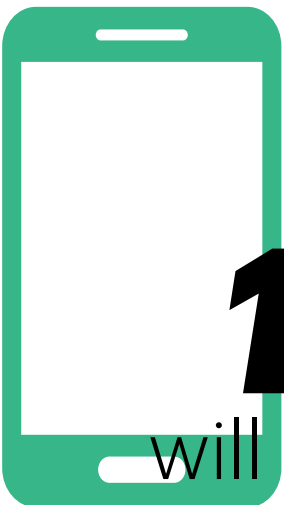
Beer Geek, 25-55

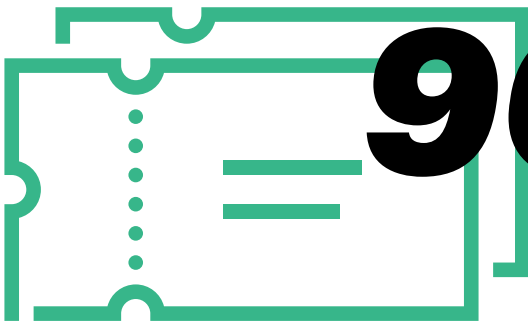


# > They actively drive craft beer culture on socials and at festivals

- They're most likely to follow brewery and beer influencer social medias, as well as being likely to post about beer
- They're one of the top two groups to attend festivals most regularly and have the largest variety of reasons to attend - with greater emphasis on knowledge and learning.

 **87%**  
say friends trust them for beer recommendations

 **1 in 3**  
will post once a month about beer

 **90%**  
will attend a festival at least once a year

"When I'm at a festival like to try as many styles as possible, partly with the intention of trying to figure out how they're made so I could potentially try making them myself later or riff upon them and tweak them slightly into different ways."

Beer Geek, 25-55



"It was brilliant with the festival app this year - seeing all the beers on the train on the way and highlighting all the things we wanted to go and drink"

Beer Geek, 25-55

"I like to express to my mates what I'm drinking because I know that they will appreciate it. I know that if I find a beer that I think is absolutely awesome, I know that my mates are going to probably think the same."

Beer Geek, 25-55





# How to connect with Beer Geeks

## Brand & Marketing

- **Give them the information behind the products and processes**
  - Events, social media, tastings, tutorials
- **Use product process and desire to create the best beer, to drive your brand story**
  - What can you tell them at point of purchase or in marketing comms
- **Offer them exclusives**
  - First access / event invites/ exclusive product

## Sales channel / occasions

- **Focus on specialist retail**
- **Off-trade important to access specialist styles or products**

## Product and portfolio

- **Special releases**
  - They respond to bigger, more specialist parts of the portfolio
- **Product Series**
  - Take them on the journey





# FESTIVAL CHEAT SHEET

Festivals are a distillation of their passion - at best they're peak moments to indulge in their primary passion



- Ensure you have some of your specials - activate around them
- Can you retail those specials at the festival?
- Give them information before they arrive - these people plan!
- Tease with exclusive / first pours that reward their status as Beer Geeks!
- Do tastings and talks that are focused on the product and process of the special ranges
- They share via WOM / Social - give them the story you want them to share



***COMMUNITEER***

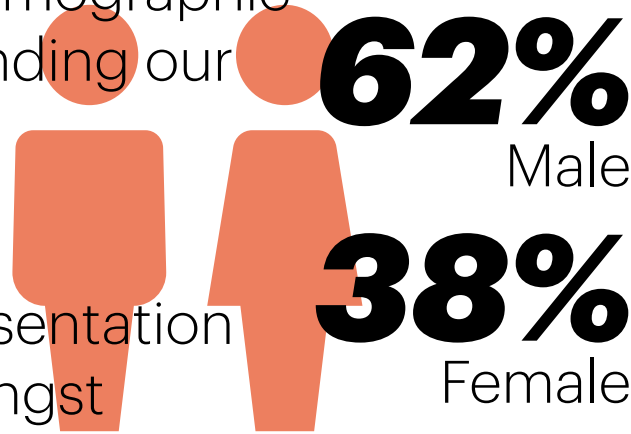


# Communteers

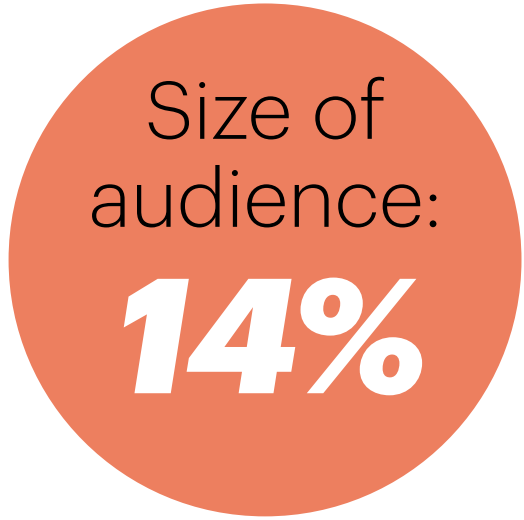
The warm heart of communion

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

Communteers match the gender demographic we know attending our festivals



Highest representation in 35-55, amongst lowest representation in under 35s



*“Community is a big one for me, when I moved to Birmingham all the pubs felt quite impersonal. It wasn’t until we moved to an suburb where there’s a couple more local brewery bars and smaller pubs, that we started to feel that sense of community again, it’s probably influenced where I drink almost as much as the beer quality.”*

Communteer, 25-55





## > They love to bond with others. A strong affinity for the local

Like-minded people and places give them a sense of belonging:

- Enjoy watching sports, being members of clubs - i.e. running clubs
- They value cultural institutions that bring people together
- Most likely to attend music festivals



*"I've got lots of different social groups. It's nice to see lots of different people that have similar interests"*

*Communiter, 25-55*

*"A bit of diversity keeps life very interesting. You know, the classic local pub, which we still have in our village. You go in there and you've got some you've got some international travellers. You've got people who haven't strayed any further than five miles from the village in their entire life. You got self employed you've got some high flyer workers you've got a huge variety of people and every one is worth listening to"*

*Communiter, 25-55*





MINDSET

# > Our most ethically minded consumer - they support the things they value



*"I'm quite conscious about supporting local establishments, whether it's the local farmers or the local cafe or whatever"*

Communiter, 25-55

*"I love what HOKA have done recently. They support running clubs and gave T-shirts away at the Hackney Half. That's a great brand."*

Communiter, 25-55



*"If I can avoid buying on Amazon I will, you have to support local businesses, if you don't use it, you lose it. The local pub, it might be a little bit more expensive but it's employing local people locally and it could be gone if you don't support it."*

Communiter, 25-55



*"My other passion is football. I was supposed to be at the the Arsenal women's game yesterday but my train got stopped in Northhampton. So I went to a taproom and the local museum."*

Communiter, 25-55



> The explosion of brands, taprooms, bottle shops and events has allowed them to feel part of a community

- **Story Seekers:** enjoy finding out the human story behind the beer
- **Authentic to passions:** cultural provenance over product story



81%

feel part of the community of beer enthusiasts



87%

enjoy taking recommendations and giving them out

“When you go to a taproom, you get to talk to the people. You find out all about their world and that brewery”

Communiter, 25-55







Most likely to have a couple of pints and a pub quiz at your local taproom

*"Often what's exciting is the direct connection with the people who are producing it or are very passionate about it. It's that immediate connection with someone who really cares about what they're producing. I think that's exciting. Everybody wants to be part of something"*

*Communitier, 25-55*



## > Because beer is about the community, the on-trade is vital

Craft beer consumption centres on:

- Good Pubs
- Taprooms
- Bottle shops
- Festivals

*"Beer is such a social thing. I got some beer boxes during lockdown but I'd rather go to the pub and speak to people than sit at home drinking these days. I'm not a big beer drinker at home."*

*Communitier, 25-55*

Enjoy styles with long history of people enjoying together - cask beer, ales, porters

- Cask, ales, porters etc.



## > They like lower ABV beers that allow them to focus on conversing and connecting

*"I don't want to try five double IPAs. I'm just gonna have a lager you know. Or days where you just want to sit in a beer garden and have a pint and Landlord is the single greatest thing on earth. I don't want an adventure, I want that really good pint I know is going to the spot."*

*Communitier, 25-55*

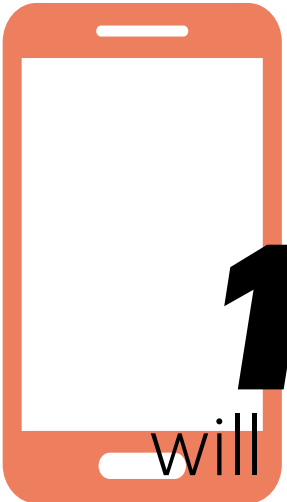




## > They invest in their local, rooted offerings as much as possible

- Alongside beer geeks they're most invested in beer as a primary passion and likely to share recommendations in person and on social media

 **87%**  
say their friends trust them for beer recommendations

 **1 in 4**  
will post once a month about beer

"For me, I like it when it feels properly authentic to the local area. A lot of people will come to Dublin and have an amazing pint of Guinness, you know, it's proper."

Communiter, 25-55

"It's about passion. When you find places where the owners, chefs or brewers are front and centre, there's a bit of story behind it that entices me"

Communiter, 25-55





## > They're drawn to breweries with a story to tell or with strong local roots

### Love breweries with strong local roots

- Strong local presence like Kernel, Wiper & True, DEYA, Gipsy Hill and North
- Or have tied themselves to a certain communities - i.e. Mikkeller / Running, Signature / Music, 'Queer Brewing / LGBTQI+



*"Our audience is good, decent local people. For us it's about hospitality."*

John Gyngell, North Brewing Co.





# How to connect with Communiters

## Brand & Marketing

- Put people at the centre of our your brand  
- your founders, brew team, drinkers and community
- Communiters are your local champions - utilise your taproom(s) to connect with local community
- Connect and access them through other interest groups, events, passion / social groups
- Tell your founder story - they respond to people-led stories - build the romance around your brewery
- Express your values as business  
- Build your brand around those (Brewgooder, Gipsy Hill carbon neg. Queer Brewing Project)

## Sales channel / occasions

- On-trade is key - pubs and taprooms
- Events / spaces where people come together

## Product and portfolio

- Champion your sessionable and core range - and the care that goes into it
- Educate on styles / cultural provenance and why you're passionate about them





# FESTIVAL CHEAT SHEET

Festivals are highlight calendar moments for *their* community to come together and share their passions.



- Showcase products that tell stories of the place you're from
- Run 'meet the brewers' talks and tastings on the people, place and stories behind your products and brand
- Invite your audience to support you at festivals / and reward their support for coming
- Run fringe events or activate around festival with other passions - music, sports, arts etc
- Create welcoming spaces for people to enjoy each other's company



***CURIOUS CASUALS***



# Curious Casuals

Surfing the cultural trends

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

They follow the crowd, the fact beer today has so much going on makes it much more interesting than it used to be.

Size of audience:

**12%**



*"For the main part, I think a lot of beer drinkers - especially in East London - just want something a bit different, that sets them apart from mundane mainstream. The same with the pubs too."*

Cale Watts, Froth Distribution



## > The group most representative of mainstream urban food and drink culture.

**51%**

Female

significantly more than  
beer centric profiles

- They skew younger, like Pleasure Seekers
- While majority are still passionate about food and drink, they're less so than our other segments
- Less representation in higher SEC



"I like beer, don't get me wrong, I wouldn't drag myself out out the house on a wet night to go down and try different kinds of beer. I'm not that passionate about beer."

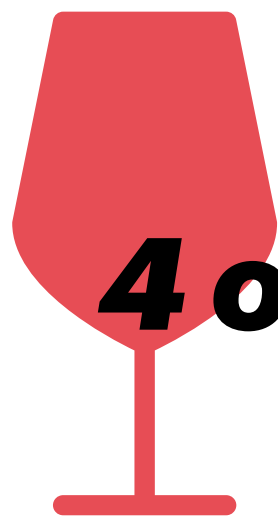
Curious Casual, 25-55



DRINKS OVERVIEW

> Beer is just one of the drinks they enjoy.

Compared to other profiles, on-trend categories like cocktails and tequila cut through



4 out of 5

drink wine regularly



71%

drink cocktails regularly

2 out of 3

regularly drink cider (compared to 1 out of 3 for Beer Geeks)



"Cocktails are probably main thing I drink. Moscow Mule would be my favourite."

Curious Casual, 25-55

"I also quite like spirits as well. I like quite like strong cocktails, a Negroni is probably my favourite. And I drink gin"

Curious Casual, 25-55





## > Good beer has a few more barriers for this group...

- **2 out of 3** agree that going deep into discussions on beer is a bit boring
- **41%** find the amount of choice overwhelming
- And, they are more price sensitive than other profiles

Recruiting this target is difficult, as they don't necessarily want to be "beer people"



"I think some people are really beer drinkers. I don't feel like a bonafide beer drinker. I do drink it. My partner laughed and said 'what do I know about beer?' I said 'exactly, not a great deal' but I do enjoy it!"

Curious Casual, 25-55

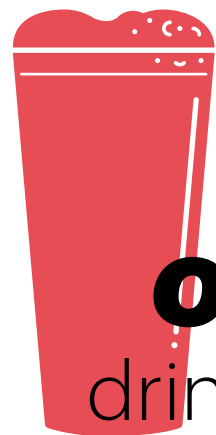


"One place that my friends go to doesn't even have a lager. So for me, I feel completely excluded, because I don't like the stouts and all that. If it's a bit hipstery I just don't feel as welcome so I don't bother going"

Curious Casual, 25-55



> They're less confident about beer and experiment less



**only 48%**  
drink IPA regularly



Craft lager and global brand lager are only categories that majority drink regularly

**1 in 4**

would on occasion experiment with a sour or dark beer



**less than 1 in 3**



say their friends ask them for recommendations

*"I've got friends who are more into beer because they'll talk about different flavour, show you a deeper appreciation in the same way that you might drink a glass of wine. I never really used to think of beer like that and I'll be completely honest the first time I tried a craft beer was in Brooklyn and I thought it was disgusting."*

*Deep Connector, 25-55*





## > When beer cuts through its about brand not beer styles

- They gravitate toward brands that have defined “craft beer” in the mainstream- e.g. BrewDog and Beavertown
- They’re more into the tropical hop-forward pales, though they wouldn’t necessarily know the provenance of the style
- A good beer is synonymous with a good pub occasion and they’re often choosing it to connect with more invested friends



*“I’m not really sure about the breweries or the styles but I really love Hazy Jane. I’ll always add that to my supermarket shop”*

*Curious Casual, 25-55*





# How to connect and what to do at festivals

## How to connect

- Hard to reach, but are looking to their more invested friends (our other profiles) for recommendations so you will catch these people through them
- Brand needs to convey modern craft creativity, or a cut through story
- Make sure style and or flavour references are easy - they need to help navigating
- Bartenders recommendations are important - trade marketing and education will drive trial

## Festivals

At festivals they're there to be with friends and for the overall experience of 'trying new things'

- Help them navigate with clear signposting on beers / menus
- Be flavour led - or ask them which beers they like
- Win their trust and then push onto something different - set the expectation before - "this will taste like..."
- Create an upbeat fun vibe / be located away
- Don't bother with product information like hop varieties etc



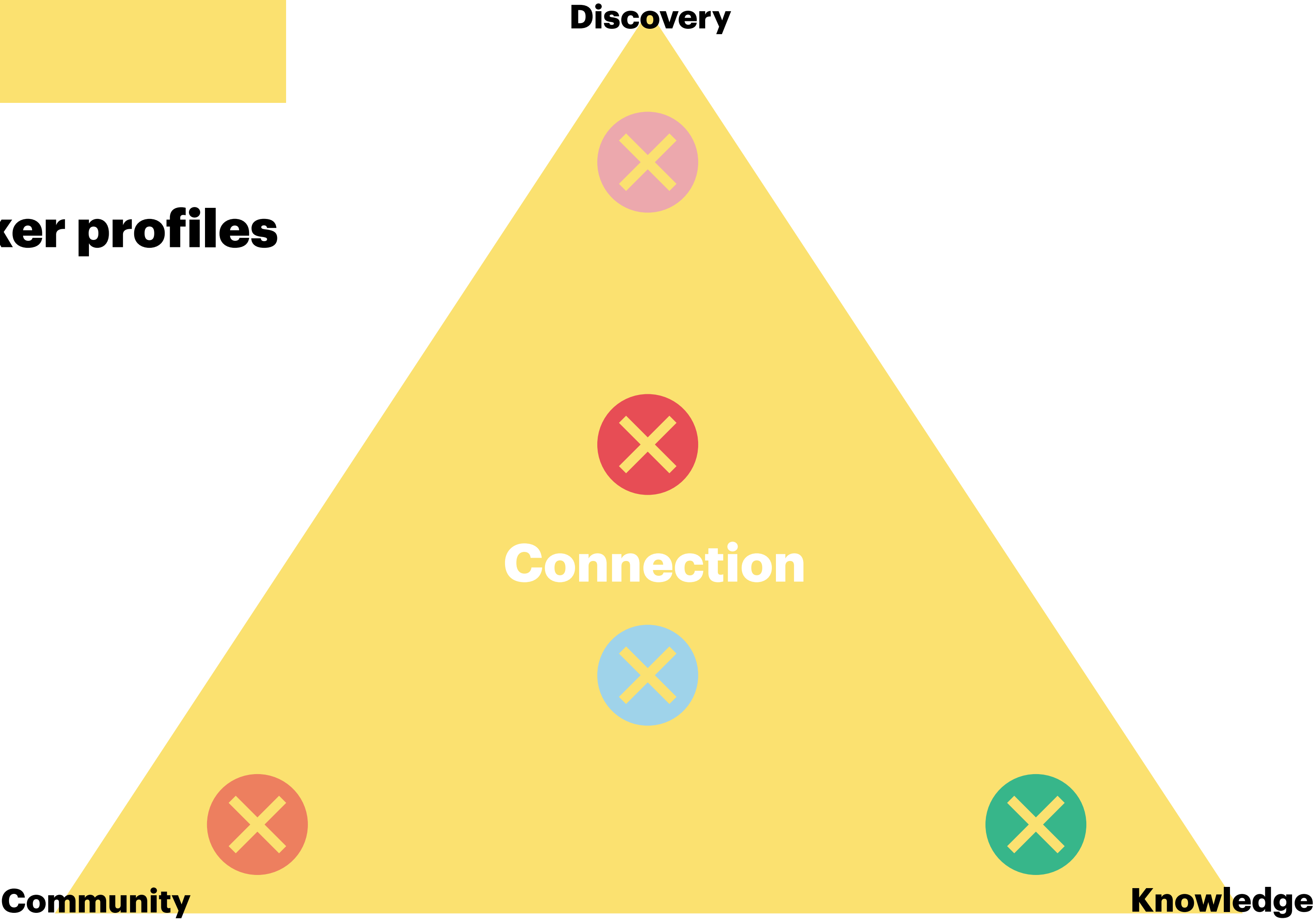




# SUMMARY

## Five key good beer drinker profiles

-  **Pleasure Seekers** 34%  
High Fidelity Allstars
-  **Deep Connectors** 24%  
Better beer, better conversations
-  **The Beer Geeks** 16%  
The Joy of searching for excellence
-  **Communteers** 14%  
The warm heart of communion
-  **Curious Casuals** 12%  
Surfing the trends







|              | Pleasure Seekers          | Deep Connectors                      | Beer Geeks                      | Communitiers               | Curious Casuals         |
|--------------|---------------------------|--------------------------------------|---------------------------------|----------------------------|-------------------------|
| Driver       | Discovery and newness     | Connection and conversation          | Knowledge and status            | Community and belonging    | Cultural experiences    |
| Connect with | Flavour, bold personality | Sessionable, accessible and reliable | Product, techniques, provenance | People, places and stories | bold brands and variety |
| In a brand   | Vault City                | Thornbridge                          | Verdant                         | The Kernel                 | BrewDog                 |
| At festivals | Novel beers and serves    | core range icons                     | Exclusives                      | Meet the brew team         | Entertainment           |



***THANKS.***

