



STRATEGY BRIEFING

2025



Recruiting the next generation
of good beer drinkers →



Overview

Recruit or die.

As the craft beer industry has matured, so has its audience. But as this core audience evolves, factors like changing life stages, increased focus on moderation and health, and shifting interests toward other categories reduce demand.

In many ways this reflects the challenges faced by cask ale in speaking to the millennials who became avid advocates of craft.

If good beer as a whole is to continue to grow and brands continue to drive the premium end of the market, we need to understand the next generation of drinkers and work to recruit them.

The danger is obvious; the consumer and customer begin to move on and the already hyper competitive market becomes even more so.

Only one thing for it.... recruit new drinkers.



Four inputs framing this briefing



Survey

We Are Beer
Consumer survey



Interview

Speaking to
experts

NEWS

Why Gen Z is drinking less alcohol

23 APRIL 2025

By Nicola Carruthers

A report by Rabobank has shunned the narrative that Generation Z is health concerns linked to social media, calling it "greatly overblown".



Synthesise

Desk research



Data

UNTAPPD
INSIGHTS

Marketing strategy needs to address three key challenges



01

Journey into drinks /
beer is different

Develop new
pathways into good
beer

02

The dynamics of
socialising have
changed

Recognise the role
for beer in desired
experiences

03

Values
mismatch

(Re) Build cultural
relevance

the challenge

1. A new journey into good beer

Formative “early drinking” experiences of millennials and gen X-ers havent been repeated at large by the next generation.

For this demographic, alcohol retail is much more regulated and they are brought up surveilled by social media / parents. Entry into the category is happening later.

The data indicates that this trend has been ongoing for some time, but by later stages of life - with typically greater financial resources and personal freedom - their alcohol consumption is likely to align with that of earlier generations.

So brands need to form a connection later in life. This should be seen positively. Why do premium drinks brands need years of 16-25 binges as a baseline category experience from which to recruit.

The job of the “premium sector” will not necessarily be premiumisation (getting them to “upgrade” in a category they’re already in) but rather recruiting them to the category and your brand in the first place.



the next gen drinker

More purposeful, better educated

They're less frivolous as a cohort, wanting to be more purposeful in the decisions they make and lifestyle choices. "What do I get from this?"

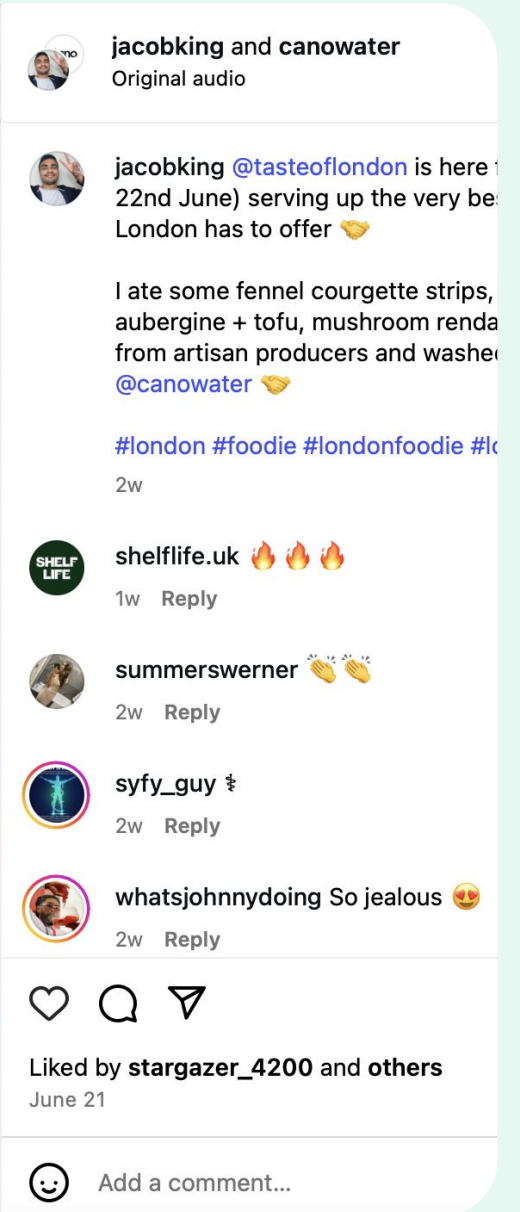
Health is very important to this group:

- 18-30 group most likely to balance consumption with exercise
- Half believe any alcohol consumption is bad for your health

But the biggest barriers are around price and finding products they enjoy in moments that matter.

Additionally, they are also considerably more "experienced" in flavour than previous gens, having entered into a much more diverse and high quality food culture.

Where engaging in the category - they're entering into a more premium space



How do we recruit?

Premium experiences at non-premium price points

Brand Appeal

Hype, scarcity, and independence from the premium playbook will not work to recruit.

Brands need to work on emotional and cultural resonance of the product, its brand and occasion to attract and include

Product

Drinkers drawn by flavour experience over style or provenance.

Is it delicious? What is the flavour experience I am going to enjoy?

Trial is key - they've grown up ready to discover

Values

The group most attuned to corporate and brand values. Social and environmental values connect as does creative expression lived through being innovative.

Nail your values. Shout about them

Occasion

When overconsumption and release isn't the draw or the defining early experience of the category.

Focus on the personal and entertainment benefits of great social experiences

Community

They want brands to "get them" and speak to their community. They're not coming to find you.

You need to access their spaces - i.e. influencers, activation, collaboration - in order to connect in their communities

the challenge

2. New social dynamics

Today's young people are navigating a social world profoundly different from the one their parents knew. Having come of age in a landscape dominated by digital connection — through games, group chats, and social media — much of their socialisation has happened behind screens, in private spaces, and on their own terms.

The old model of learning social norms through inter-generational pub culture has quietly slipped away, leaving fewer shared rituals to guide them into the adult social life much of the beer category relies on.

At the same time, the traditional night-time economy — once built around binge drinking and ritualised “release” — has lost its appeal. In its place is a generation still deeply motivated by connection and experience, but seeking it on very different terms. They want to gather, but not necessarily in the ways previous generations did. The desire is there — the spaces and experiences brands offer just haven't caught up yet.



the next gen drinker

Ready to engage

Gen Z is often painted as anti-social — glued to their phones, hesitant to engage face-to-face, disconnected from the rituals of real-world interaction. But that perception misses the deeper truth. This is a generation not avoiding connection, but actively seeking meaningful moments and purposeful social experiences— be that at work, with family or alongside friends.

Far from avoiding interaction, many Gen Zers crave in-person experiences that carry emotional or inter-generational value — whether it's collaborative time in the office, shared meals or playing sports together.

They're also sharply aware of the cost of constant connectivity: nearly two-thirds of our audience say they're trying to reduce their time on social media, driven not by rejection of the social world, but by a desire to protect their mental health and make space for more intentional interactions.

Gen Z isn't disconnected. They're just looking for better ways to connect.



How do we recruit?

Re-defining the on-trade experience

Pubs

The argument for the pub hasn't been made to this gen. But it could be!

Marketers need to sell pubs as inclusive spaces, where generations and different parts of the community can connect. "Old man" or "gastro" alone will miss the mark, Where is your brand?

Entertainment

The drink used to be the main event, now it's the sidekick.

This generation are used to the overstimulation of intensive entertainment like gaming - just drinking doesn't cut it.

Be it food, music, games, sports, markets - on-trade experiences need to dial up the entertainment

Taprooms

Taprooms can be the pubs of the future in many ways; a blank canvas to build social activity for your community, inviting people to enjoy your products in new ways.

How do you activate your taproom for younger drinkers?

Portfolio

This generation want their tastes catered to and don't want themselves or their friends to feel excluded.

You want to ensure on-trade experiences have all the bases covered for this cohort to socialise and that your product and brand to have played a role

the challenge

3. Values mismatch

Today's drinkers are not just younger—they're fundamentally different. Shaped by a broader, more diverse set of cultural and demographic influences, accelerated by the internet, the next generation brings with them a new spectrum of values: inclusivity, authenticity, and purpose.

They're guided by their values, and because they're personal cultural and social capital is so important as so much is recorded, judged and debated on social media, their choices and not getting it wrong is key.

This shift has created a growing disconnect between these values and how beer is still often presented. The lingering legacy of "lad culture" and narrow masculinity in beer branding has failed to resonate with modern audiences in the same way that "craft" did with millennial drinkers.

For the good beer category to thrive, it must confront and shed outdated stereotypes.. There is a real risk in applying the same strategies that worked in the past - doing so will not only miss the mark, but also alienate potential new drinkers. To move forward, beer must reflect the world as it is now, not as it was.



The next gen drinker

Values and aspirations

While pockets of culture are doubling down on rigid masculine ideals, our audience is largely moving in the opposite direction. Our research shows they're the most socially, ethically, and environmentally conscious cohort yet - more progressive and aware than previous generations were at their age.

Often unfairly labelled as anxious or disengaged, the reality is more nuanced: they're clear-eyed about the challenges ahead but still confident and optimistic in their ability to shape their own futures.

Unlike earlier generations, next gen drinkers defy simple categorisation. As traditional cultural markers erode and media becomes more fragmented, this group reflects an increasingly diverse mix of backgrounds, identities, and perspectives. That complexity makes them harder to define.

Still, one thing remains constant: like generations before them, they respond to creativity. This is how brands must appeal with product and comms.



How do we recruit?

Re-building relevance

Dynamism

Beer can be too obsessed by definitions.

As things become less rigid, beer expands and there are more paths of entry.

Embracing diversity and dynamism as a category, at purchase and brewery portfolio will help recruit

Articulate values

Spend the time to work out your brand positioning, values and personality in order to communicate resonantly with this generation.

Don't rely on craft beer / indie narrative - "man follows passions to make world's best beer / money" - it won't work.

Creativity

Styles, flavour, ingredients, processes, influences, collaborations, packaging and beer's everyday occasionality offer a broad palette for brands to dial up creativity and storytelling. What are you able to make for their communities?

Listening

The key to building the right products, brands and experiences is listening to this group and what they're responding to.

Consumers, employees, retail staff are a huge well of insight to be able to shape your marketing efforts and reconnect brand.

Conclusion

Don't assume they'll graduate into drinkers when they're old enough to get your proposition

It's always been assumed that one generation follows the same social and cultural path laid down by the previous one.

However, if this becomes disrupted, as seems to be the case with beer / drinking then you have to make the case for it all over again, rather than presuming they'll simply tow the line.

Make the case for:

- ...Why should they want to drink beer?
- ...What beer has to offer as a taste experience?
- ...What's good about it?
- ...What makes the pub a special / unique social space?



Conclusion

The key challenges to recruit

You need to adapt your marketing to a world and audience already here

What are this gen about?

Stop being scared. They're an exciting group with aspirations

How do we engage?

There's a need to think innovatively from product through to marketing

1

Rethink the recruitment journey into good beer

Purposeful and with a more natural predisposition to premium. But you might be entry into category

New pathways in. Premium experiences at non-premium prices

2

Socialising and its dynamics have changed

They're not anxious and anti-social. Looking for meaningful IRL connection

Re-define and re-state the rich personal benefits of on-trade socialising

3

Values mismatch. Shaking off the category image that no longer resonates

They've a broader set of values and perspectives

Show up in their communities and express the values that connect



2025

THANKS



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