



Craft Beer

Agile Attitudes & Usage Study





Table of Contents

03 Background & Objectives

07 Findings

05 Methodology

19 Appendix



Background & Objectives

Background & Objectives

With the recent rise in craft beer and its particular popularity among Millennials and women, along with acquisitions of craft beer microbreweries by larger brewery corporations, there is an interest in understanding consumer preferences around craft beer with regard to brands, occasions, purchase channels, etc., as well as perceptions of craft beer.

This research focused on understanding how craft beer consumers think about and consume craft beer, so that larger beverage companies can leverage these insights towards attracting the craft beer consumer segment.

Among craft beer consumers in the U.S., what are the usage occasions, purchase channels, and perceptions in the category?

- Understand typical beer consumption habits, including volume, styles, and types consumed
- Explore craft beer purchasing habits including brands, location of purchase, purchase drivers, etc.
- Understand motivation to purchase/consume craft beer, as well as attitudes about consuming craft beer





Methodology

Methodology

This study was conducted via an online quantitative survey. Survey clicks were balanced to population level data on age, gender, and region to ensure a natural fallout of the sample.

Audience	Total Respondents
Age	21+
Gender	Male / Female
Household Income	\$30,000+
Role in purchasing craft beer	Primary or shared responsibility
Most recent purchase of craft beer	Past two weeks





Findings

Key Findings

Craft beer drinkers value variety in their beer

- About half have consumed all three types of beer in the past two weeks (domestic, imported, and craft)
- There is not a single craft beer brand that dominates the market. Instead, highest awareness and purchase scores are for brands that are available nationwide
- Notably, heavy beer drinkers tend to have higher awareness and purchase scores for more regional or local craft beer brands
- No style of beer dominated consumption either. About half of consumers had consumed a lager in the past two weeks, followed closely by pale ale

Craft beer is most commonly purchased in grocery or liquor stores, with flavor / taste driving purchase decisions

- Grocery stores and liquor stores are the most common retail channels for craft beer, and craft beer is best consumed at home with friends or with a meal
- Crafty beer drinkers hear about new brands from friends/family. Brands should consider how they can encourage their current purchasers to make recommendations to their friends/family to build awareness and interest in the brand
- Flavor/taste was the top ranked factor when deciding which craft beer to purchase. Given that consumers can't always taste a beer prior to purchase, brands should focus on how to communicate a unique and favorable flavor/taste in their advertising and marketing materials

Key Findings

Craft beer is considered to be more unique, have more flavor variety, and taste better than domestic or imported beer

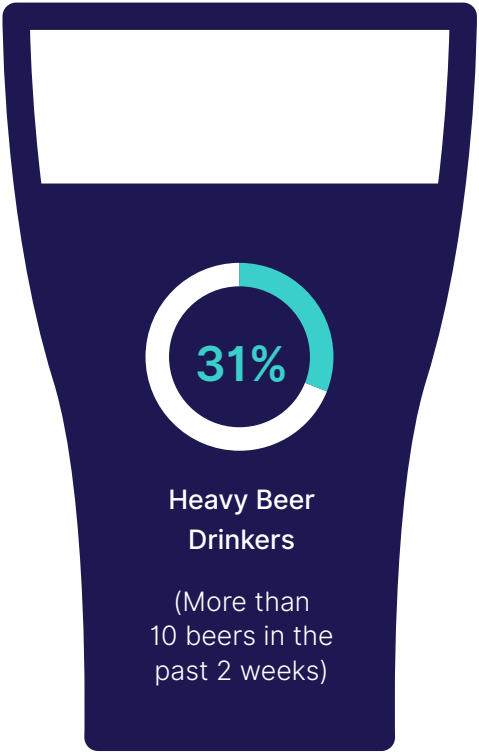
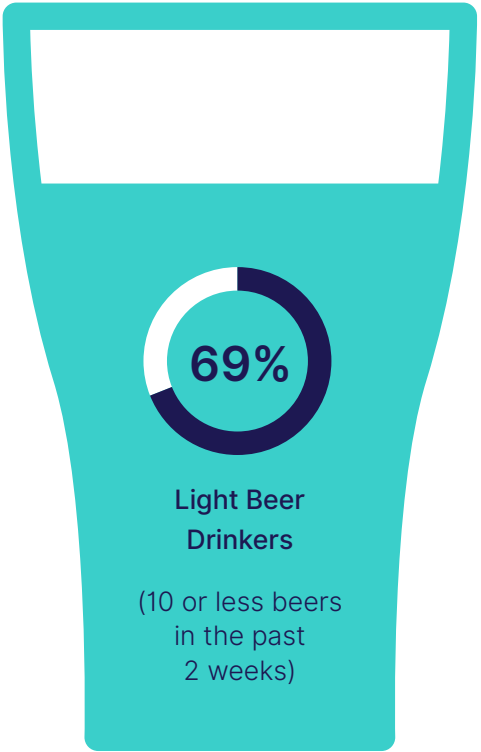
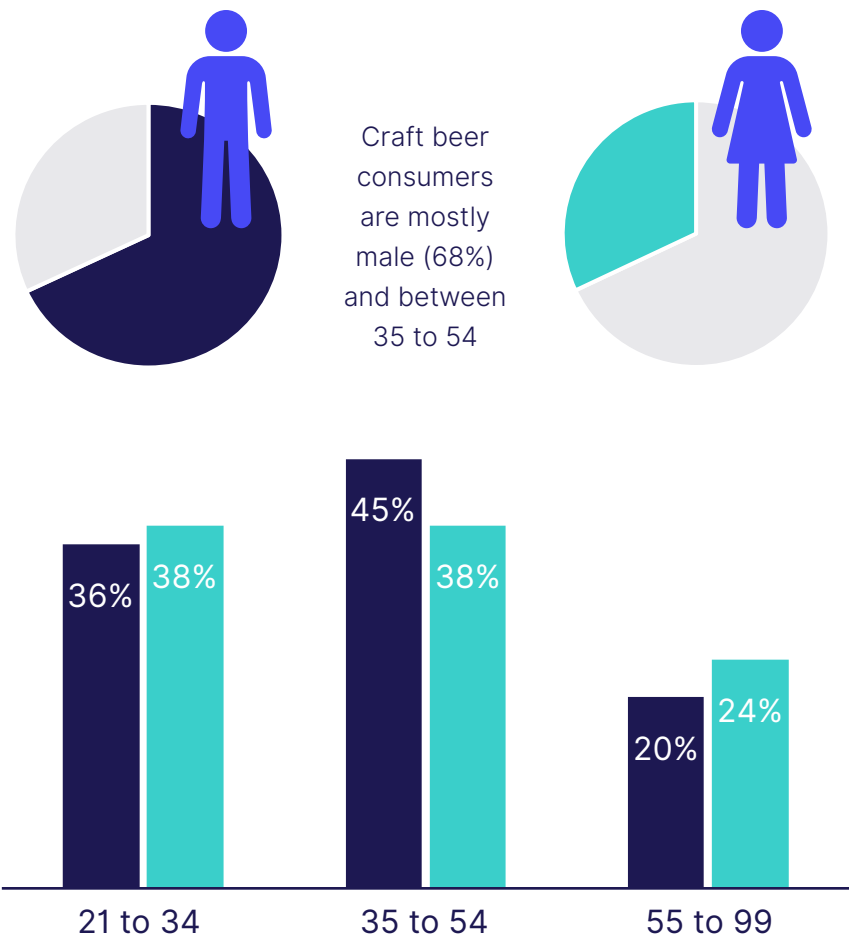
- More than 80% of craft beer consumers agreed with these statements
- Craft beer brands can use this information to encourage domestic and imported beer drinkers to make the switch to craft beer

Supporting local businesses is important to craft beer consumers, so acquisitions by large/corporate brands lead to mixed opinions

- More than 80% of craft beer consumers agree that they are supporting local businesses when they purchase craft beer; however 38% feel that craft beer brands that get acquired by large/corporate brands are sell-outs, and 26% say they would stop buying a craft beer brand if they got acquired
- Large/corporate brands should manage this perception carefully when going through an acquisition to prevent consumers of that particular craft beer brand from feeling like they have lost an opportunity to support a local business

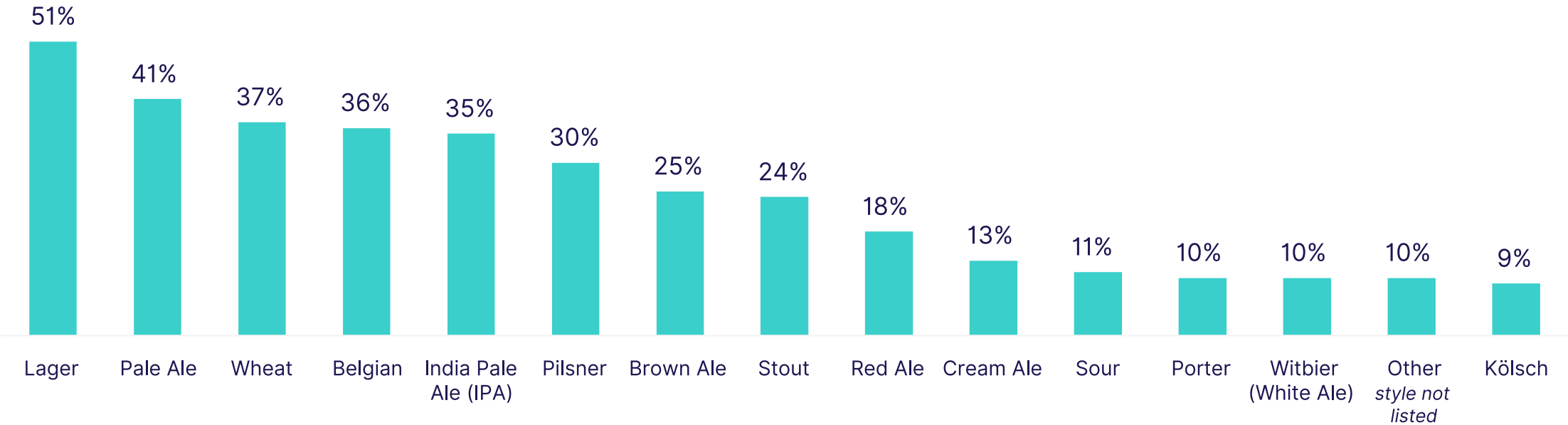
Craft Beer Consumer Profile

More than half of craft beer consumers have consumed less than 10 - 12 oz. servings of beer in the past two weeks



Beer Styles Consumed In Past Two Weeks (n=300)

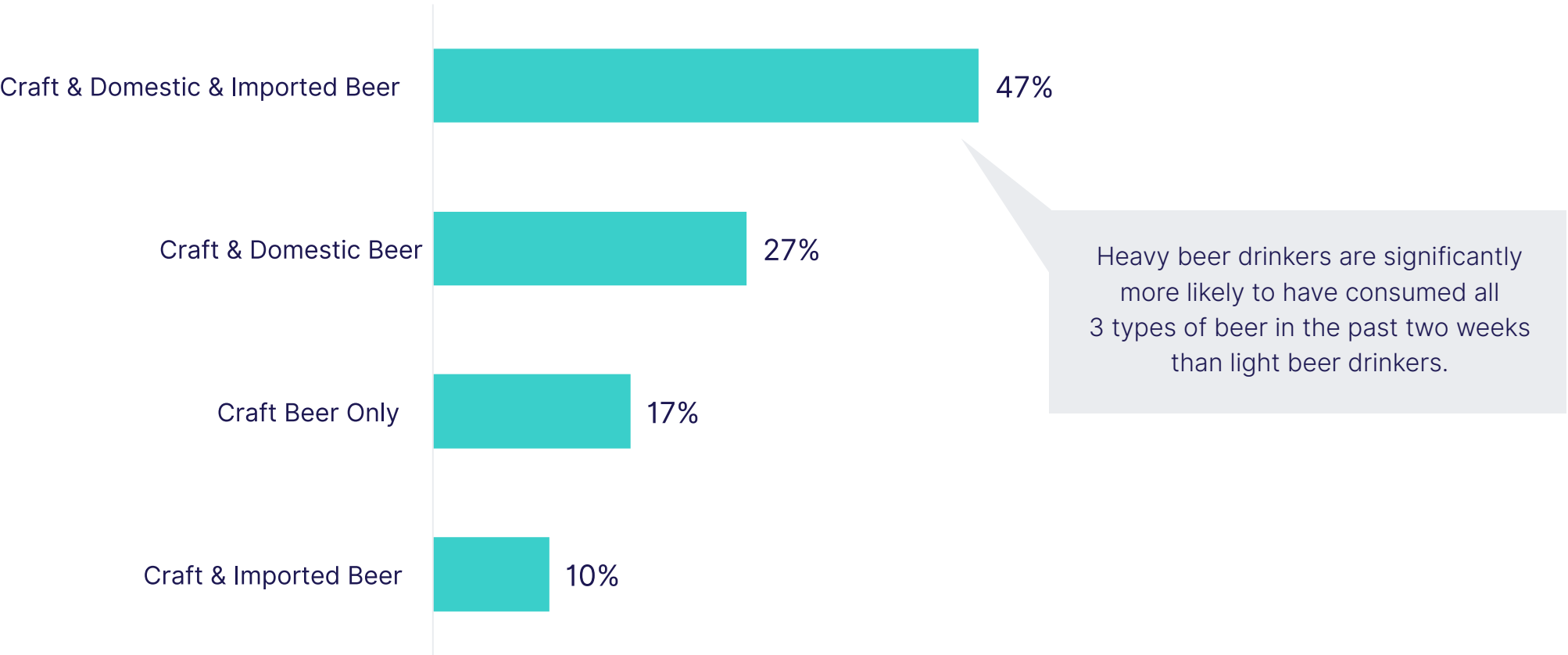
Craft beer drinkers have consumed more than 3 styles of beer in the past two weeks, on average



Q3. Which of the following styles of beer have you consumed in the past two weeks?

Other Types Of Beer Consumed Past 2 Weeks (n=300)

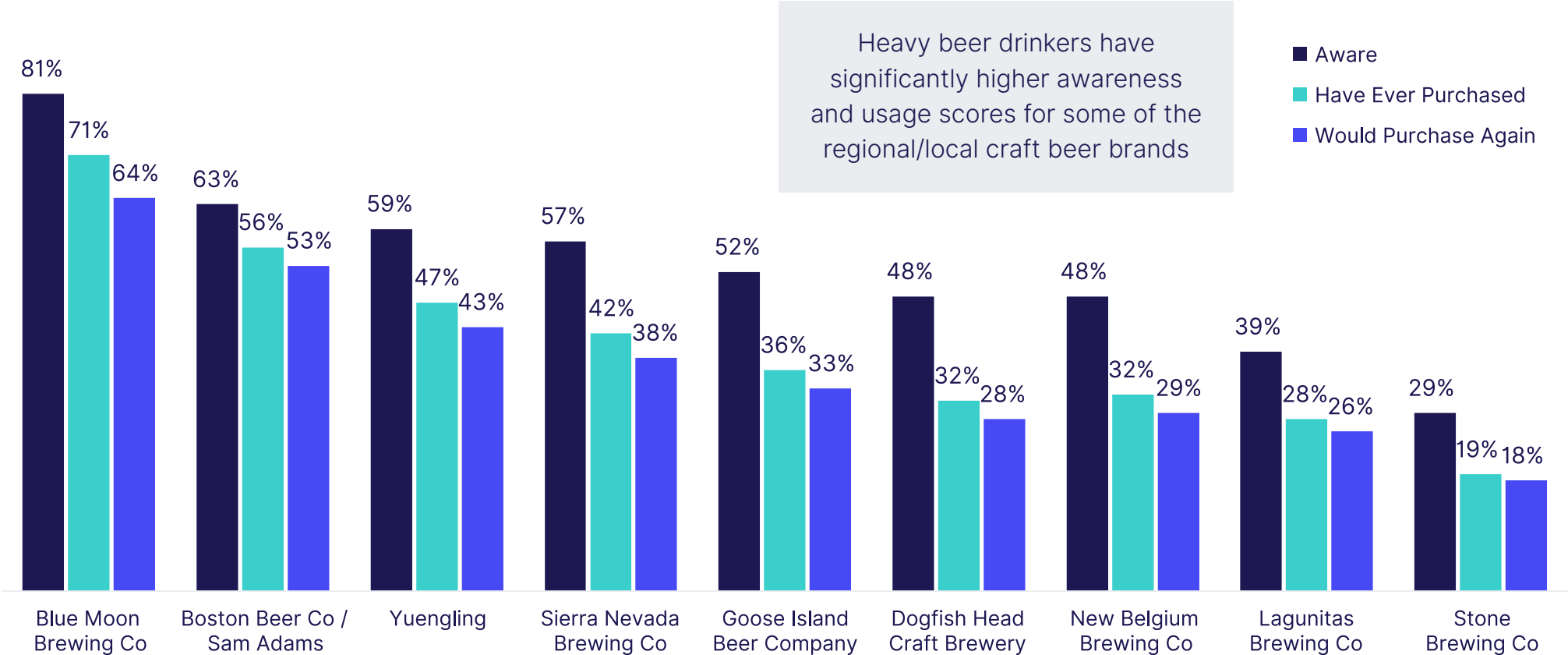
About half of craft beer consumers have consumed all three types of beer in the past two weeks



Q4. What specific types of beer have you consumed in the past two weeks?

Brand Awareness And Usage (n=300)

The brands with highest awareness and usage scores are the brands available nationwide



Note: Only showing brands with top 10 awareness; see Appendix for full list of brands.

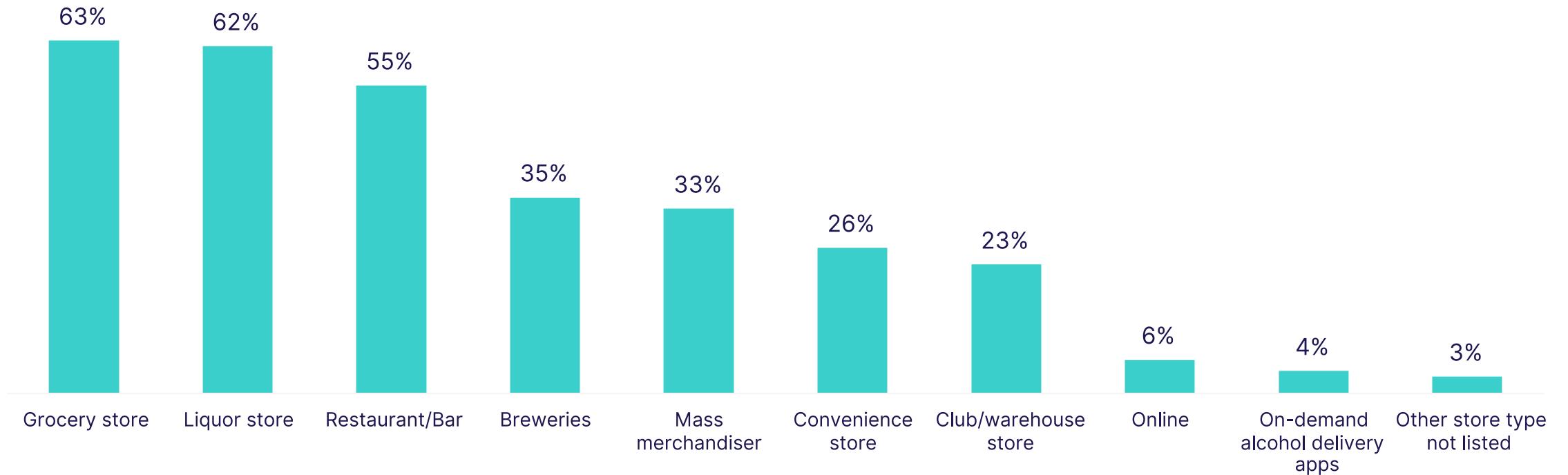
Q8. Which of the following craft beer brewing companies are you aware of?

Q9. From which of the following brewing companies have you ever purchased craft beer?

Q10. Among the breweries from which you have purchased craft beer, which would you consider purchasing craft beer from again?

Craft Beer Retailers (n=300)

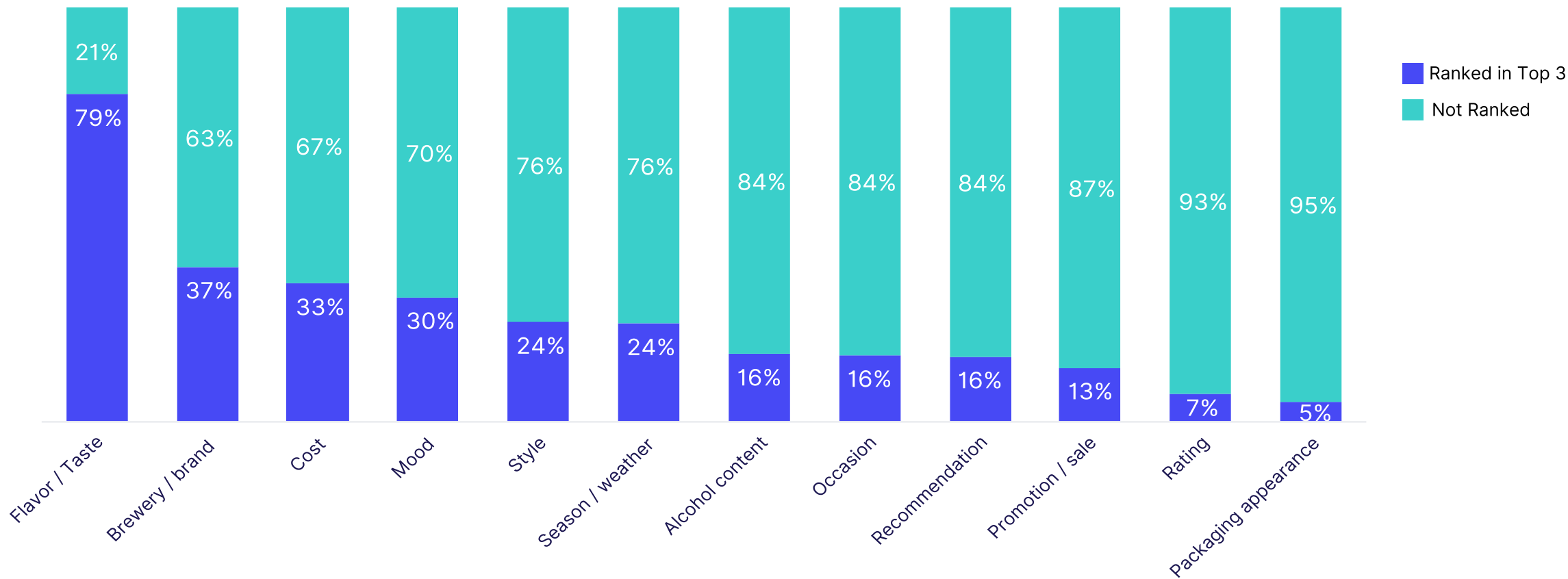
Grocery stores and liquor stores are the most common retail channels for craft beer purchases, followed closely by restaurants/bars



Q11. Where do you typically purchase craft beer?

Craft Beer Purchase Drivers (n=300), Summary Of Top 3 Ranks

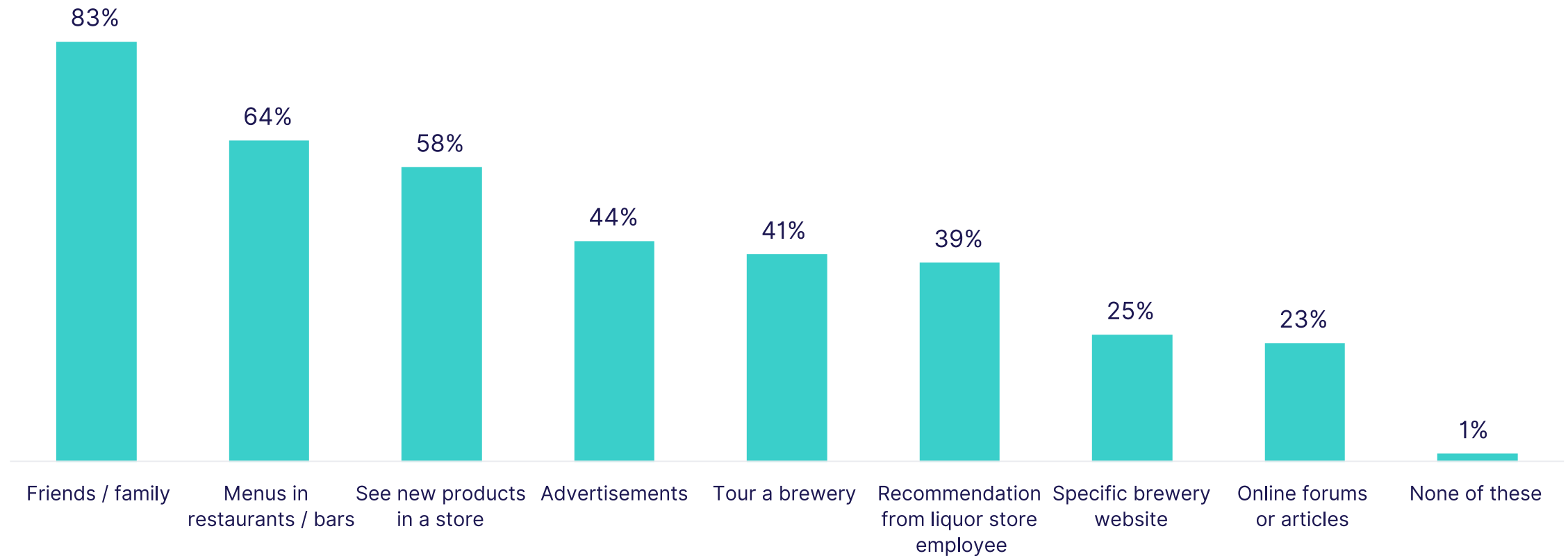
Flavor / taste is the primary decision factor for consumers when deciding which craft beer to purchase



Q12. From the list below, please rank the top 3 factors that impact your decision of which craft beer to purchase.

Learning About Craft Beer Brands / Breweries (n=300)

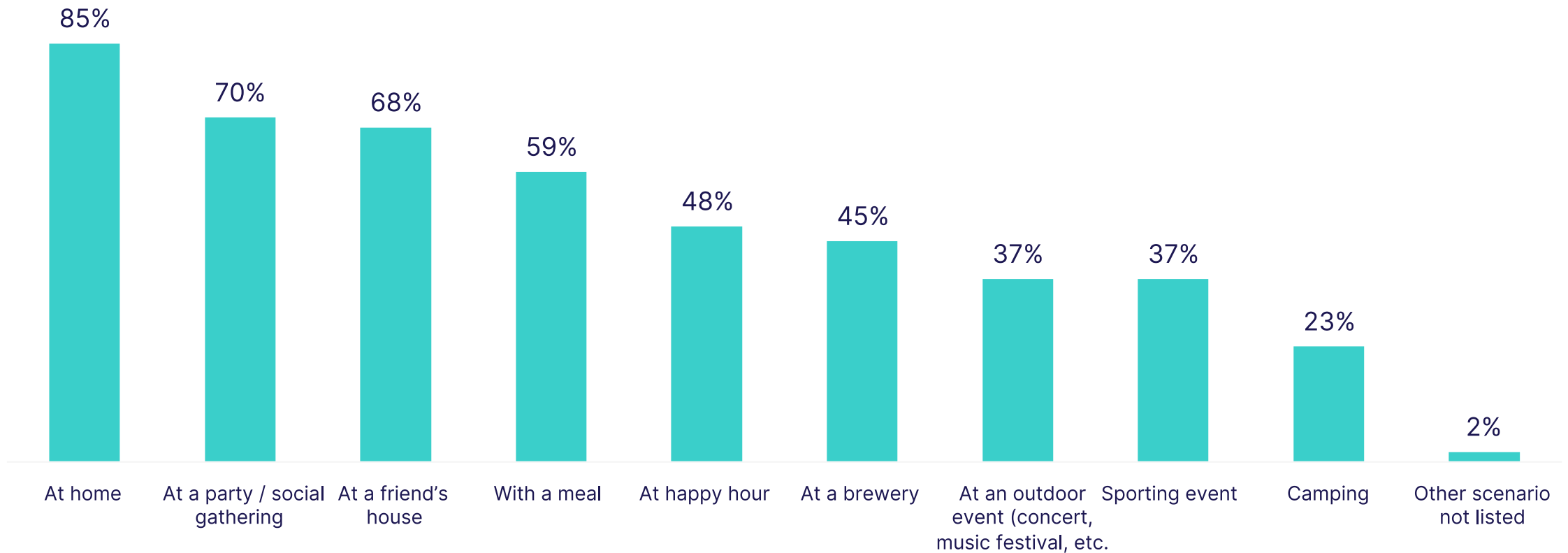
Friends / family and seeing new brands at a restaurant, bar, or store are the main ways of learning about craft beer breweries / brands



Q13. Which of the following are ways that you have learned about craft beer breweries / brands?

Locations for Drinking Craft Beer (n=300)

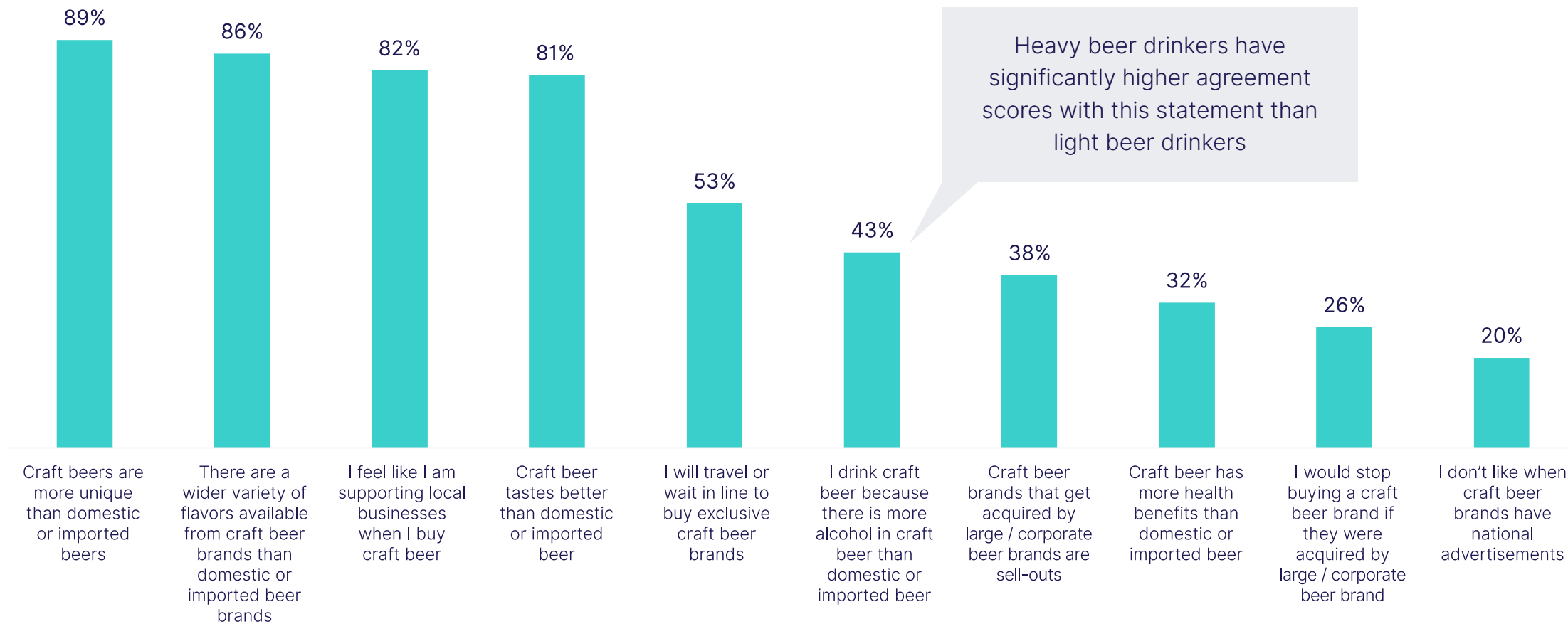
Craft beer is consumed at a variety of locations including at home, parties, and friends' homes



Q14. Where do you typically drink craft beer?

Craft Beer Attitudes (n=300), Summary Of T2B

Craft beer is considered to be more unique, have more flavor variety, and taste better than domestic or imported beer brands. Additionally, consumers feel like they are supporting local businesses when they buy craft beer.



Q15-20. Please state your agreement or disagreement with each of the statements below.



Appendix

Appendix: Sample Demographics

Gender	
Male	68%
Female	32%

Age	
Under 21	-
21 to 24	7%
25 to 29	16%
30 to 34	13%
35 to 39	20%
40 to 44	10%
45 to 54	13%
55 to 64	19%
65 or older	2%

Region	
Midwest	27%
Northeast	15%
South	32%
West	25%

P2W Beverages	
Carbonated soft drinks	85%
Beer	100%
Spirits	71%
Wine or wine coolers	60%
Flavored malt beverages	34%
Hard cider	37%
Coffee or tea	90%
None of these	-

Beer Purchase Responsibility	
Fully responsible	85%
Share responsibility	15%
Someone else is responsible	32%

Recent Craft Beer Purchase	
Past week	76%
1-2 weeks ago	24%
3-5 weeks ago	-
More than 5 weeks ago	-

Appendix: Brewery Awareness and Usage (Complete List)

Brewery	Aware	Ever Purchased	Would Purchase Again
10 Barrel Brewing Co	11%	6%	6%
Ballast Point Brewing & Spirits	27%	19%	17%
Bell's Brewery, Inc	21%	14%	12%
Blue Moon Brewing Co	81%	71%	64%
Blue Point Brewing	15%	10%	9%
Boston Beer Co / Sam Adams	63%	56%	53%
Breckenridge Brewery	20%	12%	10%
Brooklyn Brewery	24%	13%	12%
Deschutes Brewery	24%	19%	16%
Devil's Backbone Brewing	16%	8%	7%
Dogfish Head Craft Brewery	48%	31%	28%
Duvel Moortgat USA	10%	7%	6%
Elysian Brewing	17%	9%	8%
Firestone Walker Brewing Co	20%	11%	9%
Four Peaks Brewing	15%	6%	5%

Brewery	Aware	Ever Purchased	Would Purchase Again
Golden Road Brewery	12%	7%	6%
Goose Island Beer Company	52%	36%	33%
Harpoon Brewery	25%	15%	13%
Lagunitas Brewing Co	39%	28%	26%
Matt Brewing Co / Saranac Brewing Co	11%	6%	5%
Minhas Craft Brewery	6%	3%	2%
New Belgium Brewing Co	48%	32%	29%
New Glarus Brewing Co	14%	9%	9%
Oskar Blues Brewing Holding	13%	9%	8%
Sierra Nevada Brewing Co	57%	42%	38%
Spoetzl Brewing	9%	5%	4%
Stone Brewing Co	29%	19%	18%
SweetWater Brewing Co	19%	11%	10%
Yuengling	59%	47%	43%
Other craft brewery not listed	23%	32%	42%