Cultivating Craft Futures in Ireland

By Bord Bia in partnership with Jump!

BORD BIA Thinking House

jump!



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The objective of this research is to help Craft Beer & Cider makers identify priority growth actions to drive fresh consumer & trade demand in Ireland

Research was conducted in February & March 2021

Understand Tomorrow

Secondary research identifying today's landscape & **exploring the future context** & **emerging consumer needs**

Define Tomorrow

Trade interviews

- On-trade [Craft Bars] x 2
- Supermarket x 2
- Off-licence [Chain + Independent] x 2

Consumer Qualitative Research

Focus Groups (90 mins)

- x3 Craft Non-rejectors, ages 25 – 29; 30 – 39; 40 – 55.
- x1 Regular Craft Consumers, age 30 – 39.
- Mix of Male & Female
- Dublin, Limerick, Cork, Galway, Waterford

Super-fan Depths x3

- (45 minutes), Dublin 25 – 29, Cork 30 – 39, Galway 41 – 55.

Friendship Pair Depths

- (90 mins) x 2 Craft Non-rejectors, Dublin, 25 – 29, 30 – 39.

Consumer Quantitative Survey (10 min)

- Craft consumers & Craft non-rejectors (N=501, ROI)
- Nat. rep. within age, gender, region & social class
- Min. quota of 100 each: Cider drinkers, Craft drinkers, & Craft Non-rejectors.
- Fieldwork 19th - 26th March

Invent Tomorrow

Sign posts focused on **growth action priorities** to drive consumer & trade considerations, engagement & purchase

1.0 Market Context



Photo by cottonbro on pexels



Whilst enjoying some growth since 2017, Craft Beer share in Ireland stands at 3.5%, well behind the likes of US (24%) UK (5%)

As a category, Craft Beer remains fairly niche & struggles to fully break through into mainstream

Source: Conversion.com, Brewers Association

Photo by Elevate on Unsplash



Large players continue to enter the Craft category offering Craft like options

"... With so many different brands now, it can be hard for people to know what's what & I think we need to make it easier for them – independent breweries need to do more to distinguish themselves"

- Stephen Clinch, Trouble Brewing

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Photo by Elevate on Unsplash

David vs. Goliath

Large players have the cut through.

The future might involve more alliances?

Luke Johnson, an investor in hospitality businesses including Patisserie Valerie and Gails has completed a deal to purchase Curious Brewery. The plan is to create an "alliance of beers" That could be brewed through the Curious Facility. They are developing a buy and build strategy. Taking on beer companies that need recapitalising

- Judith Evans & Alice Hancok, FT, May 2021

"There are hundreds of these beer people eulogising 47 different kinds of beer but in truth, only about 5 have cut through, and four are owned by the big brewers"

- Paul Walker, Hunters Brewery, UK

Photo by Elevate on Unsplash

Craft Beer is seeing increased momentum from consumers as it is playing to the values that people aspire to

40% Irish beer drinkers have tried or are open to trying Craft Beer

38% associate Craft with being small & Independent

49% find a Craft Beer sustainability message 'very appealing'

"People now understand that they are part of the equation for solving issues of climate change and sustainability. They have to be involved in that conversation and be thought of as part of the change"

- Dr. Anna Sulan-Masing, academic, co-founder of Voices At The Table, and co-founder of Sourced, CLT 2021

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021, Base n=501
Source: Mintel Why Beer will lose if Craft brewers go under, 2020, Base n=1350

Photo by Carlos Blanco on Unsplash

The Trade also recognise Craft has evolved, streamlining to produce better quality products



> “[at some point]…Craft beer went bananas where everyone & their brother got involved in it, like the gin boom”
>
> — Bar Owner

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021

Photo by Carlos Blanco on Unsplash

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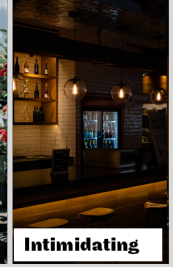
Craft is also shaking off the hipster, ‘trendy’ stereotype that was synonymous with its consumers & products in the past, presenting opportunity to gain further traction with a more mainstream audience

Old Craft World

Niche, widely rejected & stereotyped

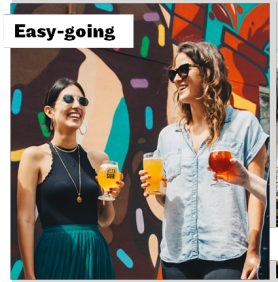


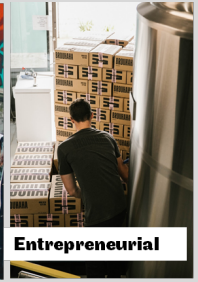


















Emerging Craft World

Mainstream, growing acceptance & agile

“I think it’s more mainstream than 10 years ago, there’s more acceptance for them. It would have been very ‘hipsterish’ before. Now, it's not the case ” - Male, 25 - 29

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021

Nonetheless, less than 1 in 5 would consider Craft most important in their selection when choosing beer, with Price being the main factor….

54% Claim 'Price' is most important when buying Beer

45% Claim 'Flavour' is most important when buying Beer

38% Claim 'Brand' is most important when buying Beer

15% Claim 'Craft' is most important when buying Beer

Source: Mintel /Toluns ROI n=936 18+ drank beer in last 3 months: Beer & Cider Ireland Mintel June 2019

Photo by Adam Wilson on Unsplash



…However, once consumers are buying into craft, the focus moves away from Price to Taste, Flavour & Quality credentials

67% Claim 'Taste' is key factor for considering Craft Beer/Cider

55% Claim 'Interesting Flavour' is key factor for considering Craft Beer/Cider

44% Claim 'Irish Brand' is key factor for considering Craft Beer/Cider

42% Claim 'Reliable Product Quality' is key factor for considering Craft Beer/Cider

Photo by Adam Wilson on Unsplash

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021, Base n=501

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Traditionally, consumed more often in bars vs. at home, Craft Beer relied on on-trade for total sale growth…

83% on-trade VS .17%

off-trade total sales*

***Total sales of Ale 2018, Much of the growth in ale sales in Iol in the last five years at some 15.5% (between 2014 & 2019) was driven by the craze of Craft Beer**

Source: Beer & Cider Ireland Mintel June 2019

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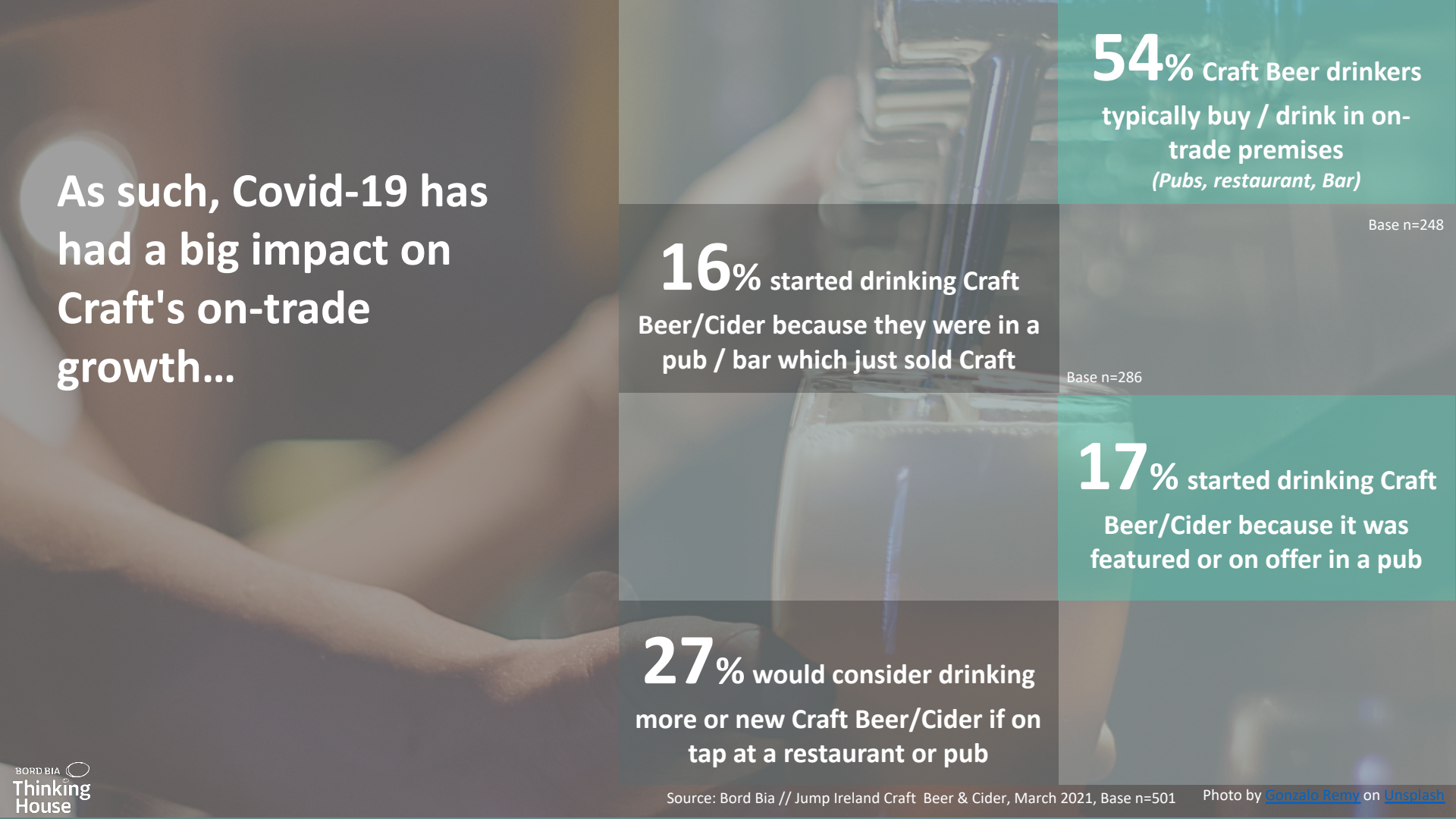
Photo by Gonzalo Remy on Unsplash



As such, Covid-19 has had a big impact on Craft's on-trade growth…

54% Craft Beer drinkers typically buy / drink in on-trade premises *(Pubs, restaurant, Bar)*

Base n=248

16% started drinking Craft Beer/Cider because they were in a pub / bar which just sold Craft

Base n=286

17% started drinking Craft Beer/Cider because it was featured or on offer in a pub

27% would consider drinking more or new Craft Beer/Cider if on tap at a restaurant or pub

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021, Base n=501

Photo by Gonzalo Remy on Unsplash

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Particularly were on-trade premises were able to support the consumer journey into craft…

> “Right, let’s do some exploration…so I might give the customer an Irish beer…But then, if they're looking to really explore I’d give them a Hop House & they tend to like the hoppiness. Then you start moving them into the Craft after that, because it's a lot of what they know & hint of what they don't know”
>
> — Bar Owner

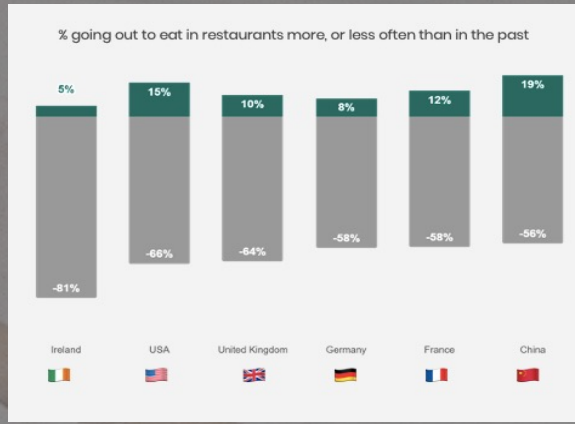
Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021, Base n=501

Photo by Gonzalo Remy on Unsplash

On the flip side, take-home alcohol sales were almost 40% higher than previous year in Ireland in 2020

Source: Nielsen April 2020

20% Consuming more alcohol during the week



Source: Bora Bia Future Proofing & Feeling the Pinch 2020

Photo by Mathilde Langevin on Unsplash

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Irish on-trade value & volume decreased dramatically as a result of pandemic closures.

-80%

Decrease in both the volume & value of bar sales from November 2020 – January 2021 vs. the same period last year.

However, off-trade sales have made take-home alcohol the fastest growing grocery category in Ireland

54%

Growth in the sales of off-trade Beer from February 2020 – 2021

37%

Growth in the sales of off-trade alcohol in the 52 weeks from February 2020 – 2021

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Source: Drink Industry Ireland / CSO, 2021. NielsenIQ FMCG Market Update 2021. Photo by Eugene on Unsplash

The pandemic has meant closer engagement with food and drink and brought people closer to craft brands

In April 2020, 56% of Americans were buying more craft beer than usual, compared to just 11% who were buying beer from big brands, and the global artisan bakery market is set to grow at a rate of 4.1% between 2019 and 2024 to reach $4.5 billion. 61 62.

A study in the Journal of Consumer Psychology found that people prefer products that were crafted by humans over those made by machines when buying something that expresses their beliefs or personality. 63

- Bord Bia, Consumer Lifestyle Trends 2021

72%

People expect to spend the same or more on groceries in the following year. This is higher than spend on any other activity

- Bord Bia Feeling the Pinch 2020

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Photo by Daniel Vogel on Unsplash



Covid-19 has created and now highlighted an opportunity for Craft brands to rethink how they position themselves & how to capitalise on these changing dynamics in consumer behaviour

14%

Craft Drinkers started trying Craft Beer/Cider as something new to do during Covid-19 restrictions

"...it's a bit more accessible now, if you go into Tesco you can see shelves of Craft Beer. I think people are realising how much nicer it is to standard beers, so I feel like it is growing at the moment"

Female, 30 – 39

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021, Base n=286

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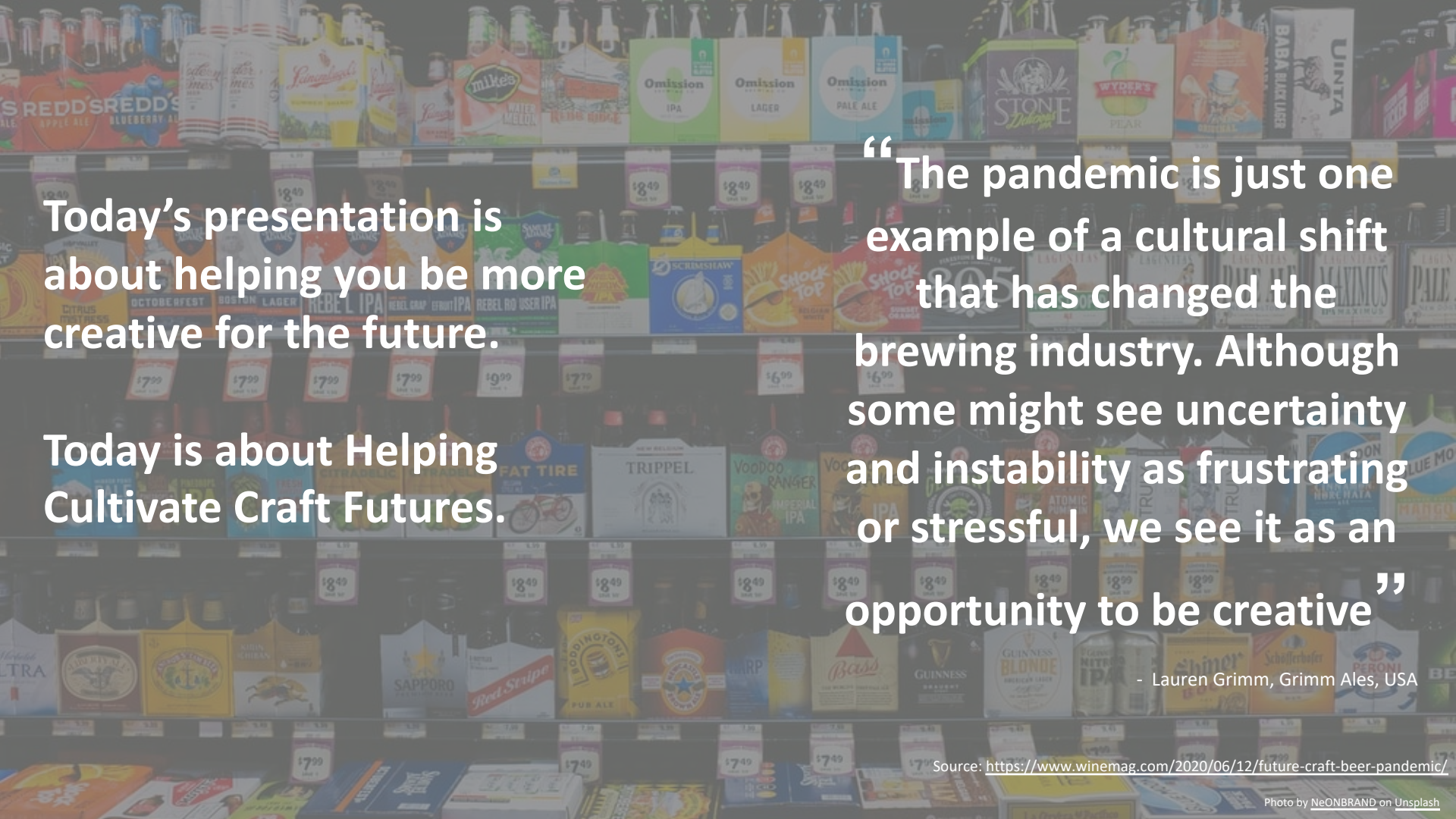
Photo by Mathilde Langevin on Unsplash



Today's presentation is about helping you be more creative for the future.

Today is about Helping Cultivate Craft Futures.

"The pandemic is just one example of a cultural shift that has changed the brewing industry. Although some might see uncertainty and instability as frustrating or stressful, we see it as an opportunity to be creative"

- Lauren Grimm, Grimm Ales, USA

Source: https://www.winemag.com/2020/06/12/future-craft-beer-pandemic/

Photo by NeONBRAND on Unsplash

2.0 Craft Beer & Cider Consumer Behaviours



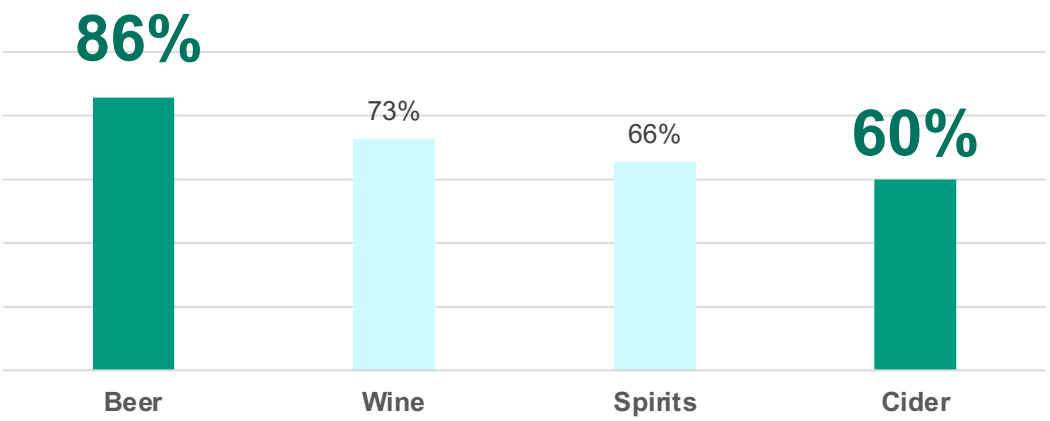
Photo by BBH Singapore on Unsplash

Beer consumers enjoy a repertoire of alcohol drinks with 2 in 5 claiming to only consume Beer & nearly half consuming both Beer & Cider

46% Consume **Beer + Cider**

40% Consume **Beer only**

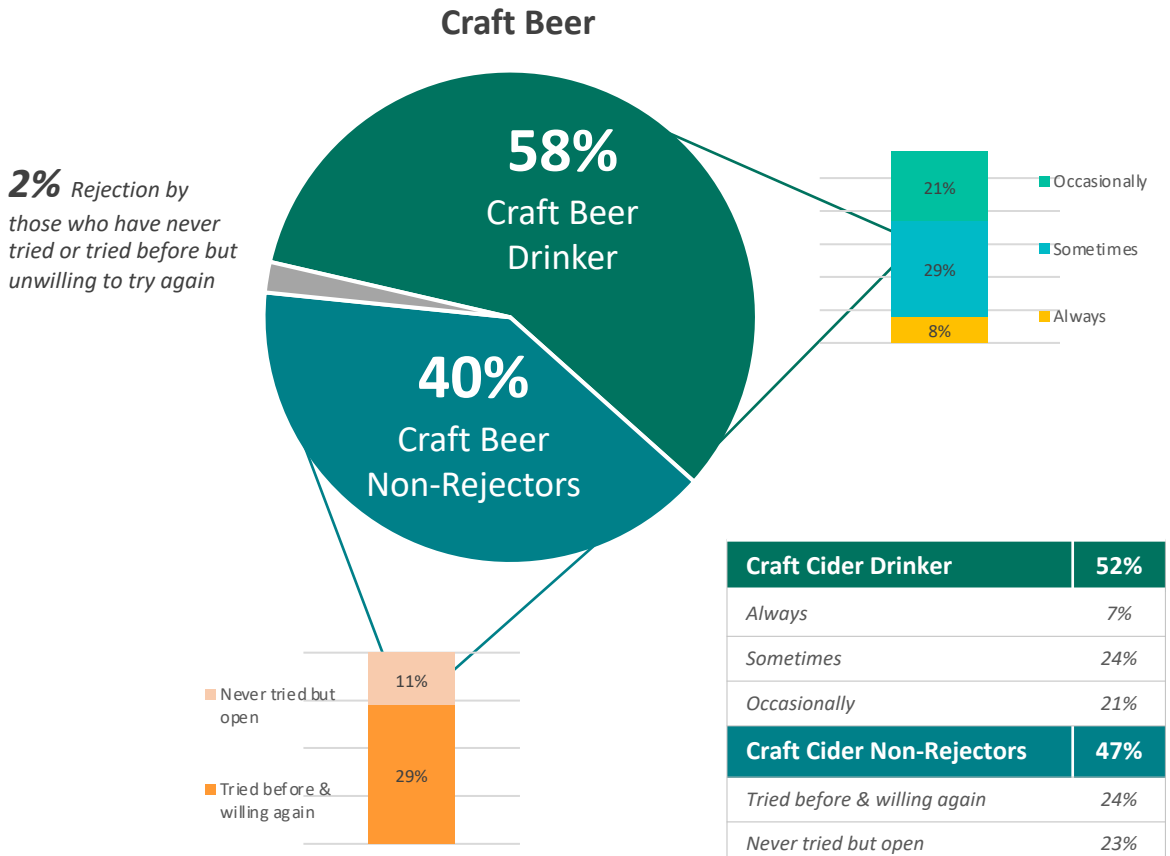
14% Consume **Cider only**



*Non-Beer & /or Cider consumers excluded

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,
S1. Which types of alcohol drinks do you typically drink. Base n=501

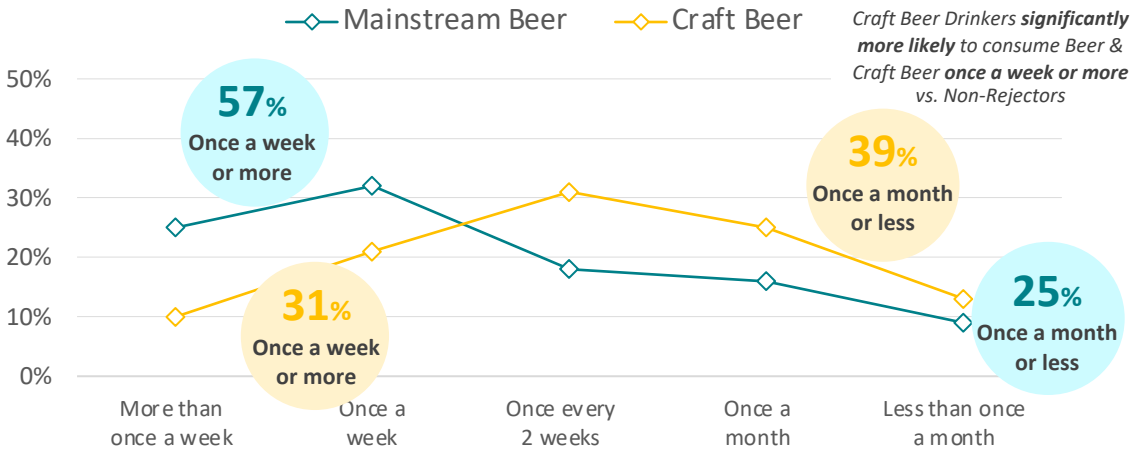
When it comes to experiences within Craft, there is very little rejection for the category, with majority having tried or willing to try Craft



Craft Cider Drinker	52%
Always	*7%*
Sometimes	*24%*
Occasionally	*21%*
Craft Cider Non-Rejectors	**47%**
Tried before & willing again	*24%*
Never tried but open	*23%*
Craft Cider Rejectors	**1%**

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,
S2. Thinking about the beer you drink, how does Craft Beer fit into your choice?. Base All Beer Drinkers n=429
S3. Thinking about the cider you drink, how does Craft Cider fit into your choice? ?. Base All Crat Drinkers n=300

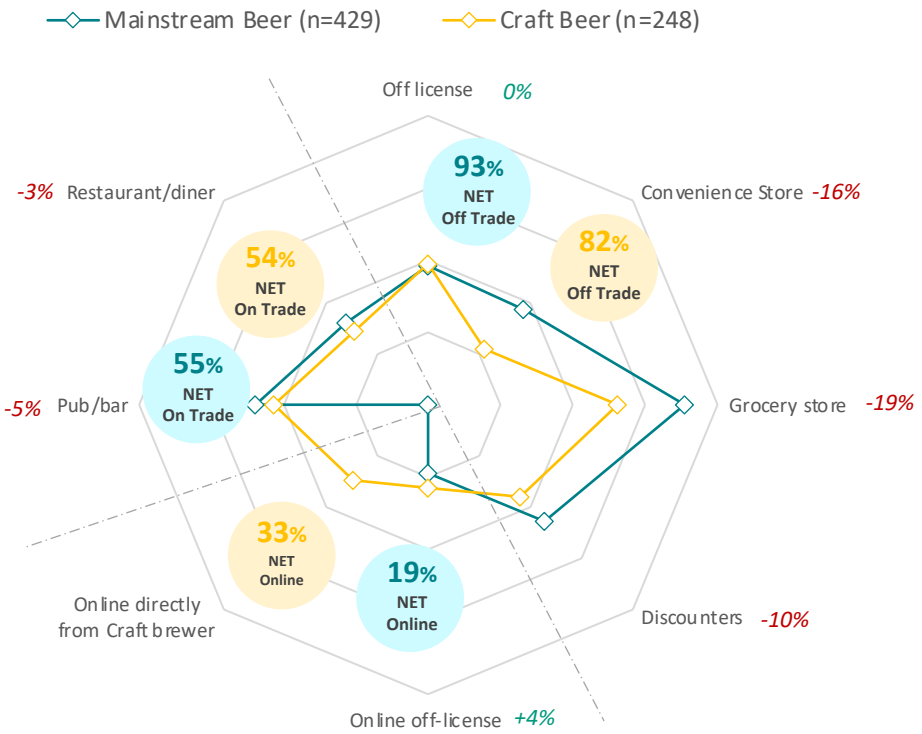
Craft Beer consumed less frequently than Mainstream Beer, with most consuming it between every 2 weeks or once a month



	Mainstream Cider	Craft Cider
More than once a week	*11%*	*8%*
Once a week	*23%*	*21%*
NET Once a week or more	**34%**	**29%**
Once every 2 weeks	**23%**	**28%**
Once a month	*24%*	*26%*
Less than once a month	*20%*	*17%*
NET Once a month or less	**44%**	**43%**

Off Trade appears to be where majority buy Craft Beer - no doubt influenced by Covid-19 restrictions, however over half still expect to buy Craft On Trade

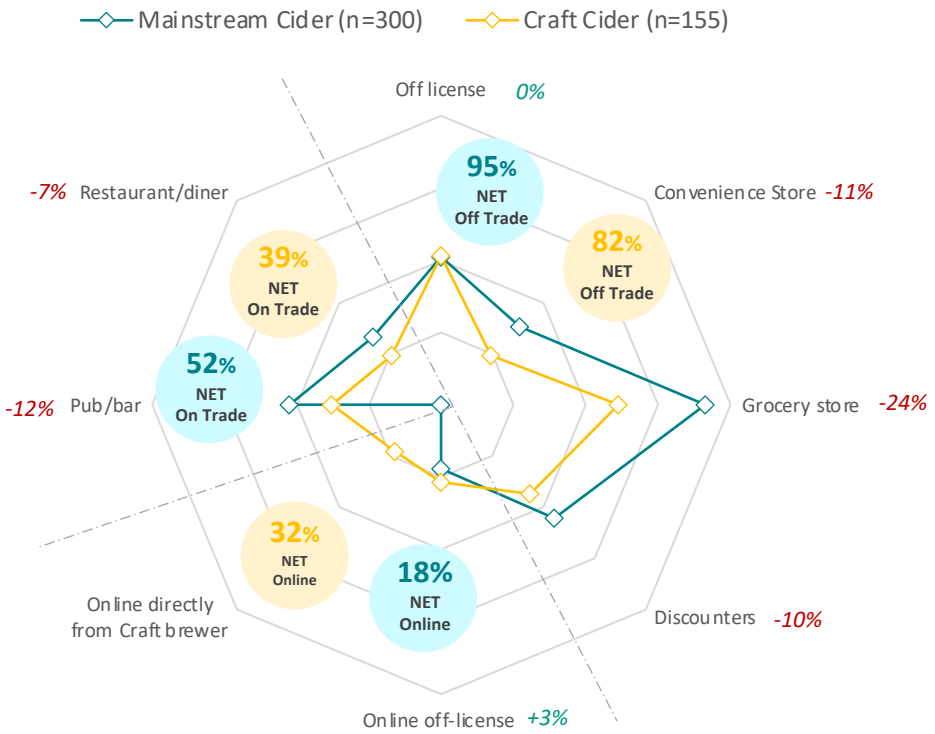
Online presents a potential opportunity with a third going direct to brewers – particularly Craft Beer Drinkers



Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,
Q5. Thinking about the beers and/or ciders you drink, where do you typically buy each of the below?

Similar story seen for Craft Cider regarding Off Trade purchase, whilst On Trade purchase of Craft Cider notably drops.

Online still presents an opportunity particularly for Craft Cider Drinkers



Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,
Q5. Thinking about the beers and/or ciders you drink, where do you typically buy each of the below?

3.0 Future Frameworks



Photo by Elevate on Unsplash

We have created

4 Future Frameworks designed to support Craft Beer/Cider producers' in their thinking…

Click on the text to navigate to each Framework

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Credibility & Confidence

Photo by kat-maryschuk on Unsplash



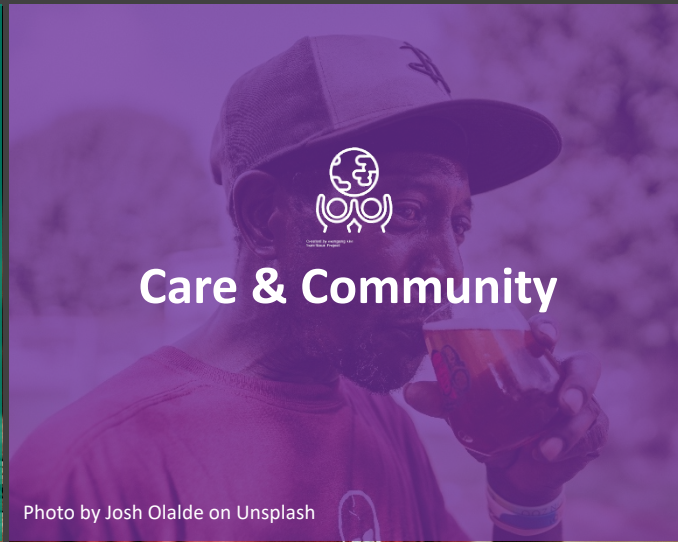
Commercial Creativity

Photo by Elevate on Unsplash



Collaborations & Connections

Photo by Dwayne Legrand on Unsplash



Care & Community

Photo by Josh Olalde on Unsplash

3.1 Credibility & Confidence

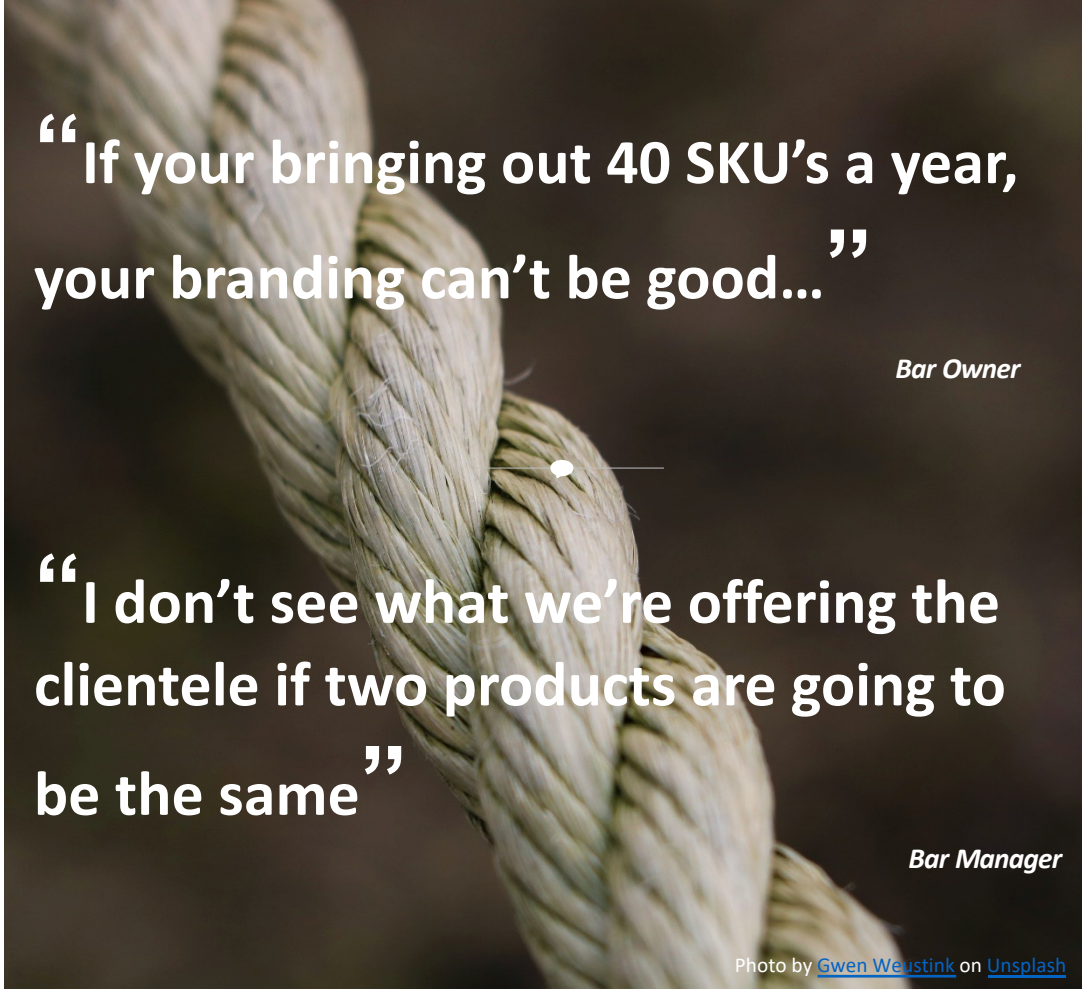


Photo by kat-maryschuk on Unsplash

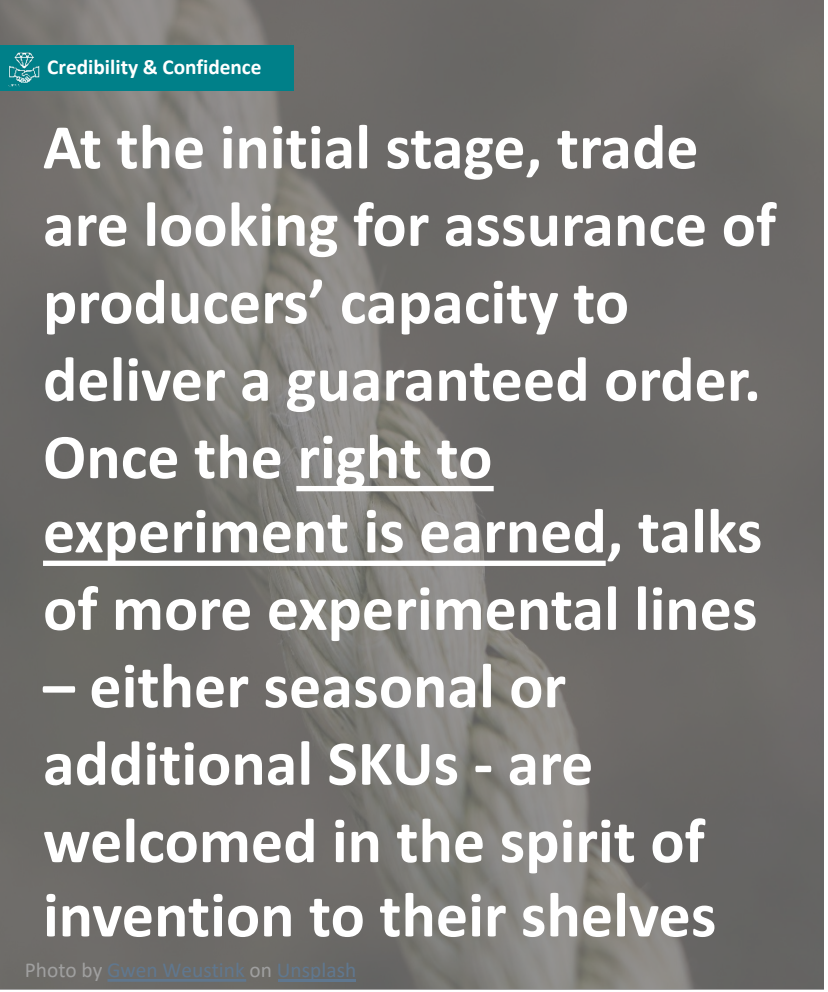
As a category reputed for its dynamic nature, desire to always be innovating can jar with product credibility - particularly for trade & tension can develop between the need to constantly evolve vs. delivering a consistent product



This can also lead to perceptions of a congested category contributing towards challenges in brand positioning, mainly in communicating a clearly defined point of difference when engaging with buyers



Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,



Credibility & Confidence

At the initial stage, trade are looking for assurance of producers' capacity to deliver a guaranteed order. Once the right to experiment is earned, talks of more experimental lines – either seasonal or additional SKUs - are welcomed in the spirit of invention to their shelves

Photo by Gwen Weustink on Unsplash

"We weren't able to list them permanently because they didn't have the capacity…"

Supermarket Buyer

"You [should] have a core range of 80% & then there is probably 20% that is fluid"

Off-licence Manager

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,

On the journey to credibility, let's not underestimate the importance of quality

Consistent quality is considered important when selecting a Craft Beer & inconsistency can deter more frequent consumption

42%

Of Craft drinkers cite **reliable product quality** as key when choosing a Craft Beer

14%

Of Craft Beer drinkers cite **inconsistent quality** as to why they do not drink more Craft beer

27%

Of Craft drinkers will consider an option they have **never tried before** when selecting Craft Beer/Cider

22%

Of Non-Craft Beer Rejectors describe Craft Beer as **'Hit & Miss'**

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,
Q8. When choosing a Craft Beer/Craft Cider, what are some of the key factors that you consider? Base Craft Drinkers n=286
Q14A. Why don't you drink Craft Beer more often (if you do drink it) or at all (if you don't currently drink it)? Base Craft Beer Drinker n=248
Q9. Which, if any, of the following do you think describes Craft Beer/Cider in Ireland today? Base n=501

However, overall, perception of Craft quality has improved & it is understood to be a category that invests in process & delivers products made with care

“In the last number of years we have seen a lot of streamlining within the sector & with that an improvement in quality”

Off license manager

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,

While the category is considered to be that "little more exclusive" this doesn't always translate to perceptions of premiumness amongst the different types of drinkers

20%

Of **Craft Drinkers** consider Craft Beer/Cider to be **exclusive**

13%

Of **Non-Craft Rejectors** consider Craft Beer/Cider to be **exclusive**

35%

Of **Craft Drinkers** consider Craft Beer/Cider to be a **premium** offering

27%

Of **Non-Craft Rejectors** consider Craft Beer/Cider to be **premium**

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,
Q9. Which, if any, of the following do you think describes Craft Beer/Cider in Ireland today? Base Craft Drinkers n=286, Base Non-Craft Rejectors n=215

As such, expense is cited as a detractor of Craft by both Craft Drinkers & Non-Craft Rejectors, suggesting consumers are not completely bought into its premiumness…

3 in 10

Consumers describe Craft Beer/Cider as **expensive**

2 in 10

Craft Drinkers claim to opt for **cheapest/less expensive** option when purchasing Craft

4 in 10

Non-Craft Beer Rejectors cite **expense** as to why they do not drink more Craft beer

3 in 10

Craft Beer Drinker cite **expense** as to why they do not drink more Craft beer

With no significant differences for Craft Cider

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,
Q9. Which, if any, of the following do you think describes Craft Beer/Cider in Ireland today? Base n=501
Q8. When choosing a Craft Beer/Craft Cider, what are some of the key factors that you consider? Base Craft Drinkers n=286
Q14A. Why don't you drink Craft Beer more often (if you do drink it) or at all (if you don't currently drink it)? Base Craft Beer Drinkers n=248, Base Non-Craft Beer Rejectors n=172

Ultimately, consumers need to feel they are getting a product that is worth it

There is a small perception that Craft still has “a bit to go” in delivering consistently good quality which in turn means category price can be challenged

“You have the good the bad & the ugly in at a similar price point, unlike wine where price points tell a story”

Bar Owner

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,

Photo by Jonas Leupe on Unsplash

The focus on price will likely remain focal with the introduction of Minimum Unit Pricing, therefore, delivering a quality story justifying a premium tag is ever more important, particularly in a post Covid-19 world

"There is a shift back to comfort…You want to know what you are getting. Big brands will flourish & value will too"

Bar Manager

"Is your product MUP proof? Is your product going to be destroyed by a minimum fixed retail based on ABV?"

Supermarket Buyer

"People would be price conscious but there's a premium being paid for the Craft for sure"

Off-licence Manager

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,

Photo by Jonas Leupe on Unsplash



Credibility & Confidence Sign Posts

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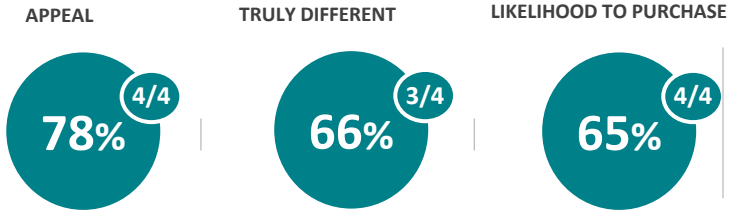
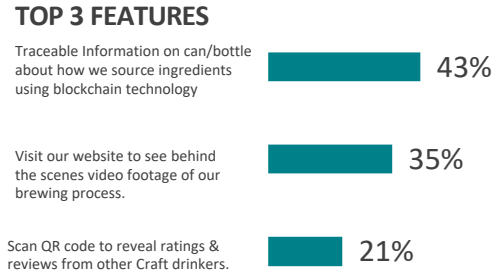
Photo by sara-kurfess on Unsplash

SIGN POST #1 Using Transparency To Communicate Quality Stories

In our statement testing*, **transparency created less energy** than some of the other platforms, resulting in the lower appeal score. However, the **highest ranked feature** – **traceable information on ingredients** – reflects consumer **demand for greater knowledge around the origins of their food & drink.**





Whose doing it well?

Third Aurora: Beerscans app

Third Aurora, a tech company focused on AR & machine learning, is gearing up to launch its platform for augmented reality beer labels so beer cans can provide more information. The Beerscans app uses the phone's camera, augmented reality, & computer vision to scan the beer, leading to an augmented reality hovering over the beer can. From tasting notes to information about how & where the beer is brewed, customers get to experience the beer's story coming to life.



Image by @thirdaurora, on Facebook

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021
*See Appendix for statements & ideas tested

Source: https://www.prnewswire.com/news-releases/augmented-reality-for-craft-beer-industry-packaging-to-follow-301261225.html

SIGN POST #2 Know Your Fit & Difference

Building a clear brand positioning is important, especially in a crowded market place. This will enable winning with consumers but also build **credibility** with the trade.

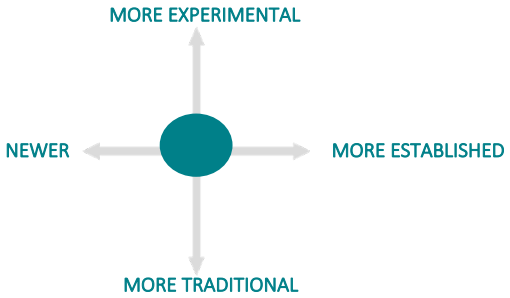
The trade need to feel that they have something that is likely to sell & that creates a point of difference. Having a cohesive & unique brand story, supported with a relevant (& consistent) brand design is key to success here.

This even includes brand labels, as people expect Craft to taste different, there's an interest to learn what is different by reading what's on the label.

Make it clear for **trade** what you bring to the table vs. competitors. For consumers, communicating point of difference, is also key. Consumers are actively reading & seeking to understand what makes you unique. Bonus, if the trade knows your difference they can talk to the consumer about it – this allows them to add value too
Market mapping is a good exercise to explore these things.
Where on the map does your brand or product sit? Where would you like to be? Where are your competitors positioned?

"You're reading the label for flavours & descriptions to make your own judgement"
- Female, 40 - 55

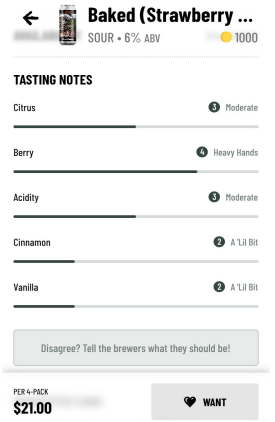
"It's almost an experience on a Friday night to come in & they ask the question & they're spending 10-15 minutes with one of the lads having a chat."
- Off-licence Manager

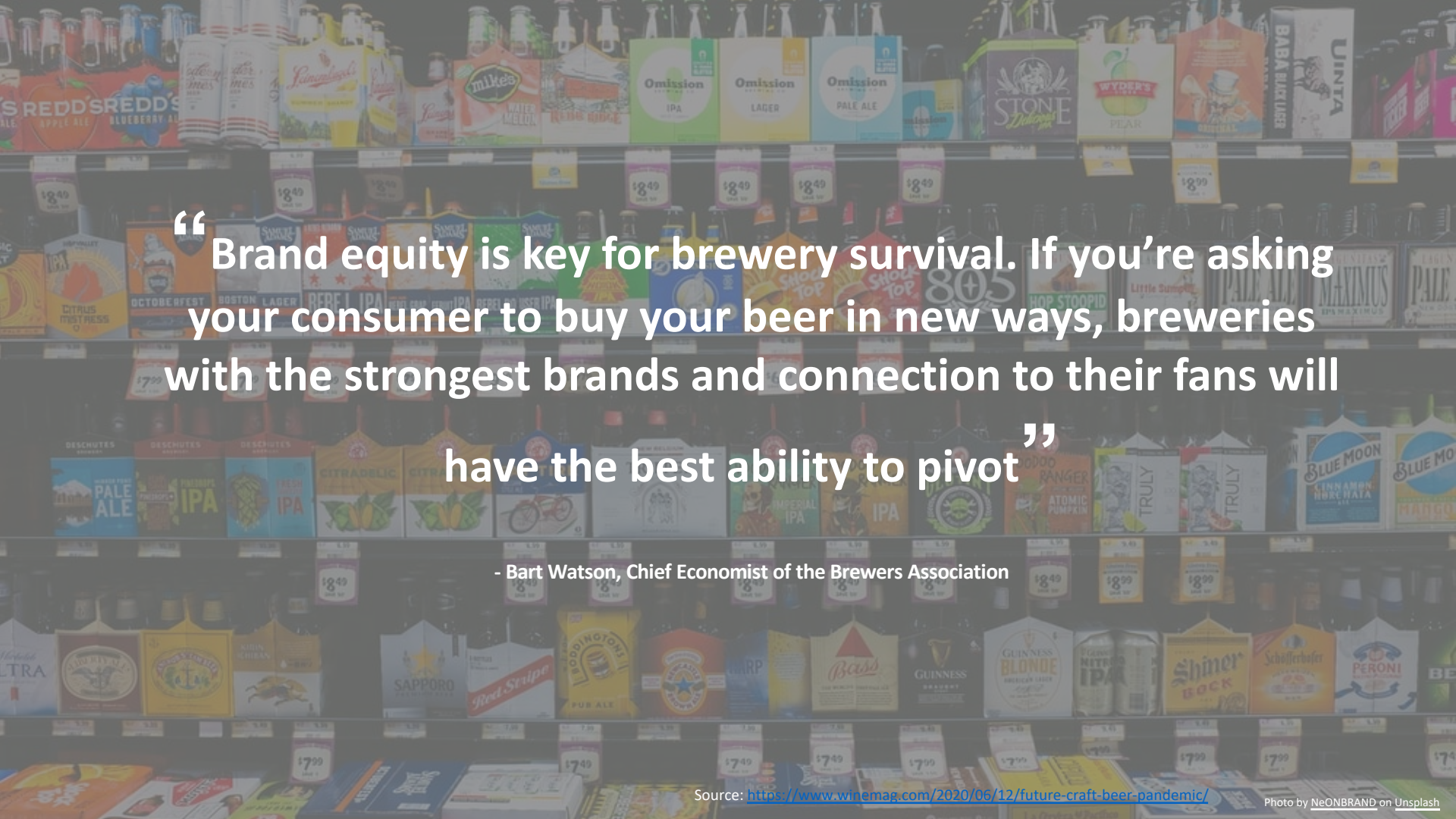


Whose doing it well?

Great Notion Brewing

Great Notion Brewing in Oregon have created an app. As part of that they have inbuilt a section with tasting notes & product reviews.





“Brand equity is key for brewery survival. If you’re asking your consumer to buy your beer in new ways, breweries with the strongest brands and connection to their fans will have the best ability to pivot”

- Bart Watson, Chief Economist of the Brewers Association

Source: https://www.winemag.com/2020/06/12/future-craft-beer-pandemic/

Photo by NeONBRAND on Unsplash

SIGN POST #3 Building Quality & Credibility Through Content Creation

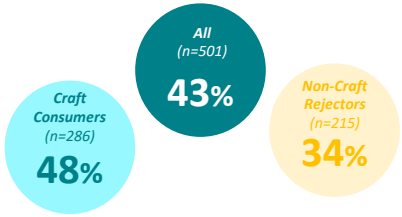
Connecting with media, bloggers & influencers is ever more important as well as understanding where & how to engage them.

Getting on those platforms creates opportunities to demonstrate product quality as well as drive confidence in your product for those looking to experiment – this delivers credibility to brand and creates leverage when talking to trade

Consider what your brand can confidently say & back up & which channel is best suited to communicate this message. In our study, **authority based prompts*** through recommendations from 'experts' were well received & over two fifths of consumers claimed it would entice them to buy more Craft

Authority Bias

Recommended by our in-store Craft Beer & Cider Expert



32%

Of **Craft Drinkers started drinking** Craft Beer/Cider due to a friend **recommendation**

43%

Of Craft Drinkers would try **new or more Craft** if **recommended** by a friend

↑ *Non-Craft Rejectors*

Whose doing it well?

Good George

Good George in New Zealand host a blog where they regularly share updates about new brews, beer venues & lock down musings. This constant updating of information creates noise & ongoing engagement



Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021
*See Appendix for statements & ideas tested

Source https://www.goodgeorge.co.nz/blog/

SIGN POST #4
If You Have Awards, Shout About Them, Be Confident!

Consumers are interested in awards! And purchase can be influenced by messages that communicate quality & credibility.

It can also drive sales…

Messages which hint to the quality & creditability of a Craft brand provide consumers with added confidence, with over half claiming it would influence them to buy more Craft Beer/Cider

58%

Of consumers would be influenced by **5 star rating** messages from Irish consumers

54%

Of consumers would be influenced by **"best selling Craft Beer/Cider"** messages

54%

Of consumers would be influenced by a Craft Beer/Cider festival **award winner**

Whose doing it well?

Fortside Brewing Company

In 2018 Fortside Brewing Company in Canada created a one off IPA called Orange Whip. It became popular in tap rooms, but after winning at BOCBA, it saw sales accelerate. A local distributor took note & became "flexible" in their terms in order to enable it be sold to a wider audience. Whilst Mike DiFabio, one of the owners admits that this doesn't always happen, in this instance the award was a platform to creating their first flagship & drive growth. He truly believed it was the opportunity from the award that made the difference. The product is now about 25% of total production

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021

Source https://www.craftbeer.com/craft-beer-muses/the-untold-benefits-of-award-winning-beer

SIGN POST #5 Earn Your Right To Experiment

First & foremost, traders are really looking for a brewery that can offer a reliable product range.

At a baseline, this includes being assured of their capacity to deliver on Craft quality, taste & guaranteeing order fulfilment.

Further to this, they are seeking a supplier that can give them one or two solid core lines, then they are willing to take a bet on some experimental lines.

Adopting a 'right to experiment' mind-set applies when thinking about both trade & consumers. Once consumer have confidence in your brand & integrate it in their repertoire, they are much more likely to experiment with new flavours. Remember, as a premium category, price can influence choice.

> "What you might find is; people will go & find say a couple of cans of say 8 degrees, & they like that & so they go 'oh there's a new one' & 'I'll try that'. Their normal purchase would be say 3 or 4 but they see that & they go 'oh sure I'll pick that one up & give it a try."
>
> - Supermarket Buyer

Whose doing it well?

Camden Town Brewery

" Here's a model of a brewery they were super smart in how to attack craft…they got to be Craft ..do their different stuff, but because they developed a permanent line. They created a high volume proposition, their pale ale is just hoppy enough to call it pale ale but it's just so seasonable, so drinkable. It used to be up to 6% but they quietly dropped it to 4 without telling anyone. I have yet to find that in Ireland, a Craft Beer that is that tasty & is not hop explosive, cos no one is having that"

- Bar owner Dublin

Camden Town Brewery founder insists big can also be beautiful

Craft beer is about attitude and ingredients rather than size, says Jasper Cuppaidge, as he moves into huge new premises



3.2 Commercial Creativity

BORD BIA Thinking House

Photo by Elevate on Unsplash

Despite increased traction in the category, consumers tend to stick to old habits & need a strong reason to believe or engage, esp. those not fully bought into Craft

48%

Of **Non-Craft Beer Rejectors** claim not to drink more Craft Beer as they **prefer their usual drink**

23%

Of **Craft Beer Drinkers** claim not to drink more Craft Beer as they **prefer their usual drink**

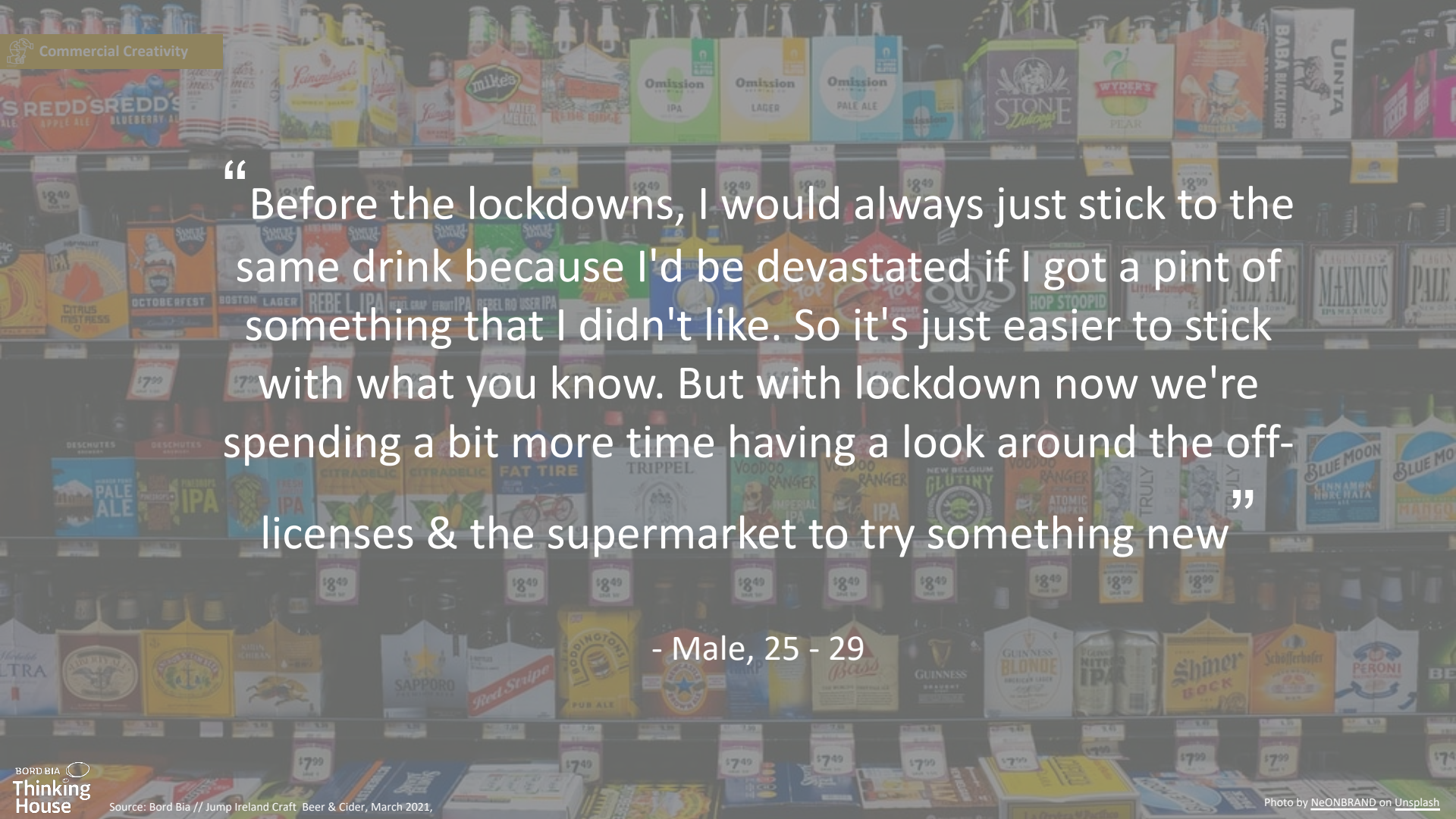
28%

Of **Non-Craft Cider Rejectors** claim not to drink more Craft Cider as they **prefer their usual drink**

22%

Of **Craft Cider Drinkers** claim not to drink more Craft Cider as they **prefer their usual drink**

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,
Q14A. Why don't you drink Craft Beer more often (if you do drink it) or at all (if you don't currently drink it)?Base Craft Beer Drinkers n=248, Base Non-Craft Beer Rejectors n=172
Q14B. Why don't you drink Craft Cider more often (if you do drink it) or at all (if you don't currently drink it)?Base Craft Cider Drinkers n=155, Base Non-Craft Cider Rejectors n=141



"Before the lockdowns, I would always just stick to the same drink because I'd be devastated if I got a pint of something that I didn't like. So it's just easier to stick with what you know. But with lockdown now we're spending a bit more time having a look around the off-licenses & the supermarket to try something new"

- Male, 25 - 29

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,

Photo by NeONBRAND on Unsplash

Whilst Craft is a welcomed addition to the table, the Craft category needs to find ways to be embraced at a broader level to grow which could even include being more sessionable

Calm Table: Stouts

'Older'; 'Sedate';
'Quiet night'

Big Need:

Stout was for the more quiet, casual night that's less of a session. They're for enjoying & savouring the taste.



Cool Table: 'New' Beer

'Late 20s to early 30s;'
'Youthful'; 'Hipster appeal'

Big Need:



The newer, more recent beer brands were viewed as experimental, & feel more in tune with younger people. There's an element of talkability about these brands.

Summer Table: Ciders

'Hot summer's day';
'Easy to drink'



Big Need:

Cider brands are the go-to alcohol beverage for a hot day as they're seen as the perfect refreshment.

Chatty Table: Established



People pleaser, Lively nights, sessionable,

Big Need:

Established lager brands were seen as the popular choice, sessionable choice. They're also the reliable alcohol beverage.

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,

While it may have “cool table virtues”, Craft tends to sit closer to the “calm table”, with some interest at the “chatty table”



56%

Of **Craft Drinkers** would typically drink Craft Beer/Cider during **casual drinks** with friends or family

“If I’m having a drink at home on a weekend night I’d get a couple of Crafts…it’s a conversation starter as well. It’s something different to talk about if you have people over.”

- Male, 30 - 39

“Craft beer drinking was at home mainly, not necessarily for an event, just Friday or Saturday, you know.”

— Off-licence Manager

Calm Table: Stouts

‘Older’; ‘Sedate’; ‘Quiet night’

Big Need:

Stout was for the more quiet, casual night that’s less of a session. They’re for enjoying and savouring the taste.



Cool Table: ‘New’ Beer

‘Late 20s to early 30s;’ ‘Youthful’; ‘Hipster appeal’



Big Need:

The newer, more recent beer brands were viewed as experimental, and feel more in tune with younger people. There’s an element of talkability about these brands.

Summer Table: Ciders

‘Hot summer’s day’; ‘Easy to drink’



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Chatty Table: Established

People pleaser, Lively nights, sessionable,



Big Need:

Established lager brands were seen as the popular choice, sessionable choice. They’re also the reliable alcohol beverage.

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,
Q11. Thinking of the times you have had Craft Beer and/or Craft Cider, which of the following occasions would you typically drink it? Base Craft Drinkers n=286

That is not to say consumers & trade do not recognise Craft's talkability factor…

Those who engage in this category are actively seeking out new & different experiences & the trade are also excited by the possibilities

59%

Would consider having or more Craft Beer/Cider if it was to try something new

36%

Of Craft drinkers claim they started drinking Craft Beer/Cider as they were excited by new & interesting flavours

"Anything away from the norm—new flavours, new techniques & creation."

— Bar Manager

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,
Q8. When choosing a Craft Beer/Craft Cider, what are some of the key factors that you consider? Base Craft Drinkers n=286
Q10. What prompted you to start drinking Craft Beer and/or Craft Cider? Base Craft Drinkers n=286
Q13. Which, if any, are reasons you would consider either trying a new / drinking more Craft Beer and/or Craft Cider? Base n=501



“Generally the conversation with the Craft Beer customer is ‘what’s new this week?”

- Off-licence Manager

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,

Photo by NeONBRAND on Unsplash

Trialling new flavours is all part of the Craft experience which consumers enjoy…

Through more flavours & styles, there's a wider appreciation that creates 'sip & savour' moments

53%

Describe Craft Beer/Cider as having a unique taste & flavour

55%

Of Craft drinkers cite interesting flavour as key factor when selecting Craft Beer/Cider

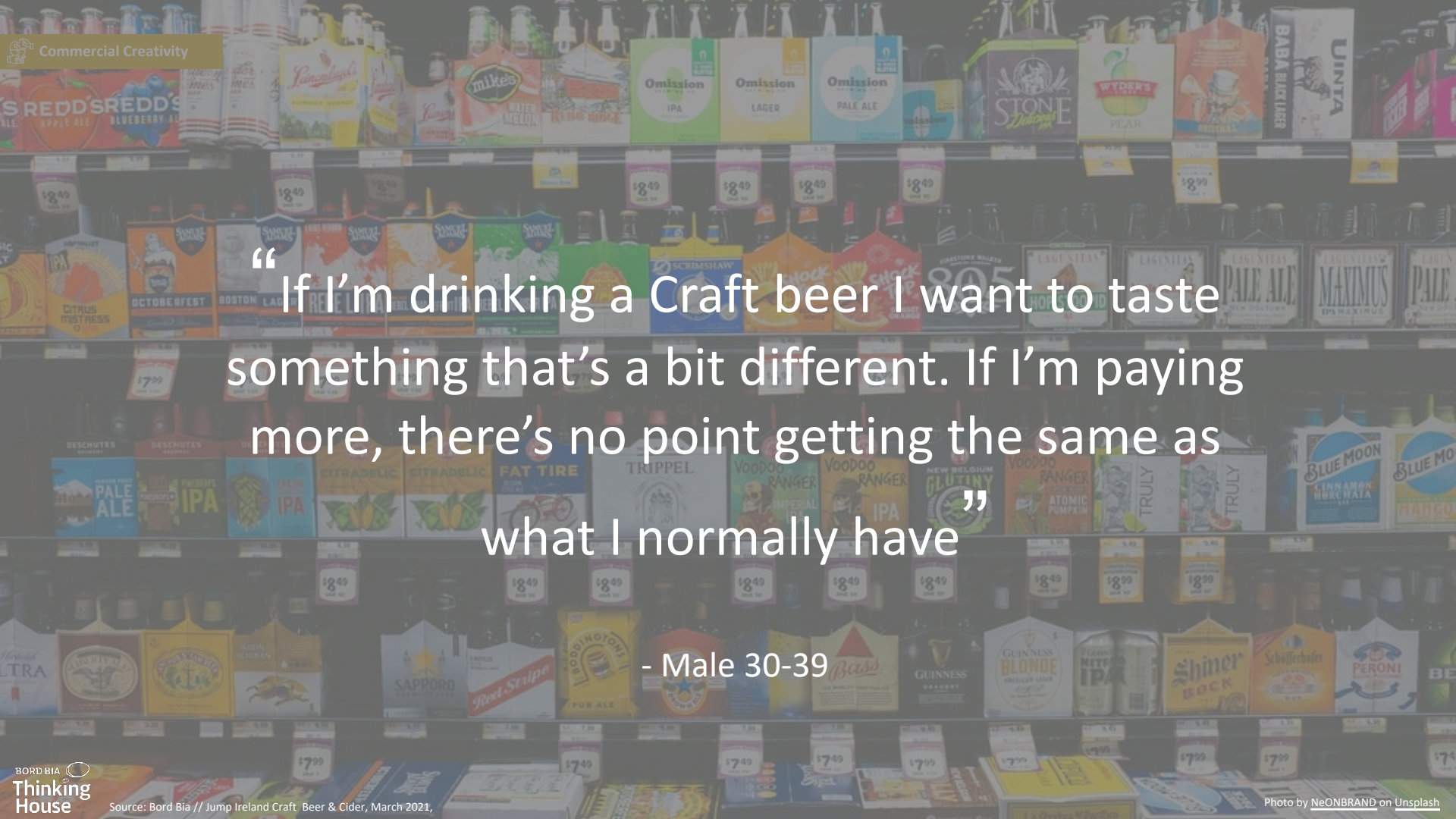
45%

Would consider having more Craft Beer/Cider if it has a new or interesting flavour

"They're different, so I kind of savour them & drink slow, then ask myself, 'what's that flavour?'"

- Male, 30 - 39

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,
Q8. When choosing a Craft Beer/Craft Cider, what are some of the key factors that you consider? Base Craft Drinkers n=286
Q9. Which, if any, of the following do you think describes Craft Beer/Cider in Ireland today? Base n=501
Q13. Which, if any, are reasons you would consider either trying a new / drinking more Craft Beer and/or Craft Cider? Base n=501



“If I’m drinking a Craft beer I want to taste something that’s a bit different. If I’m paying more, there’s no point getting the same as what I normally have”

- Male 30-39

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,

Photo by NeONBRAND on Unsplash



"I think it's just it's more exciting. Like I think a lot of the mainstream beers taste the same & I don't even think I would tell the difference between some of the regular brands, so I think yeah Craft has got more experience, more flavours & just more options"

- Female Craft Super-fan, 25 - 29

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,

Image: Unsplashed

As such, there is an expectation for Craft to offer something different & flavours is one way that it can achieve this

Creative 42% ↑ *Craft Drinkers*

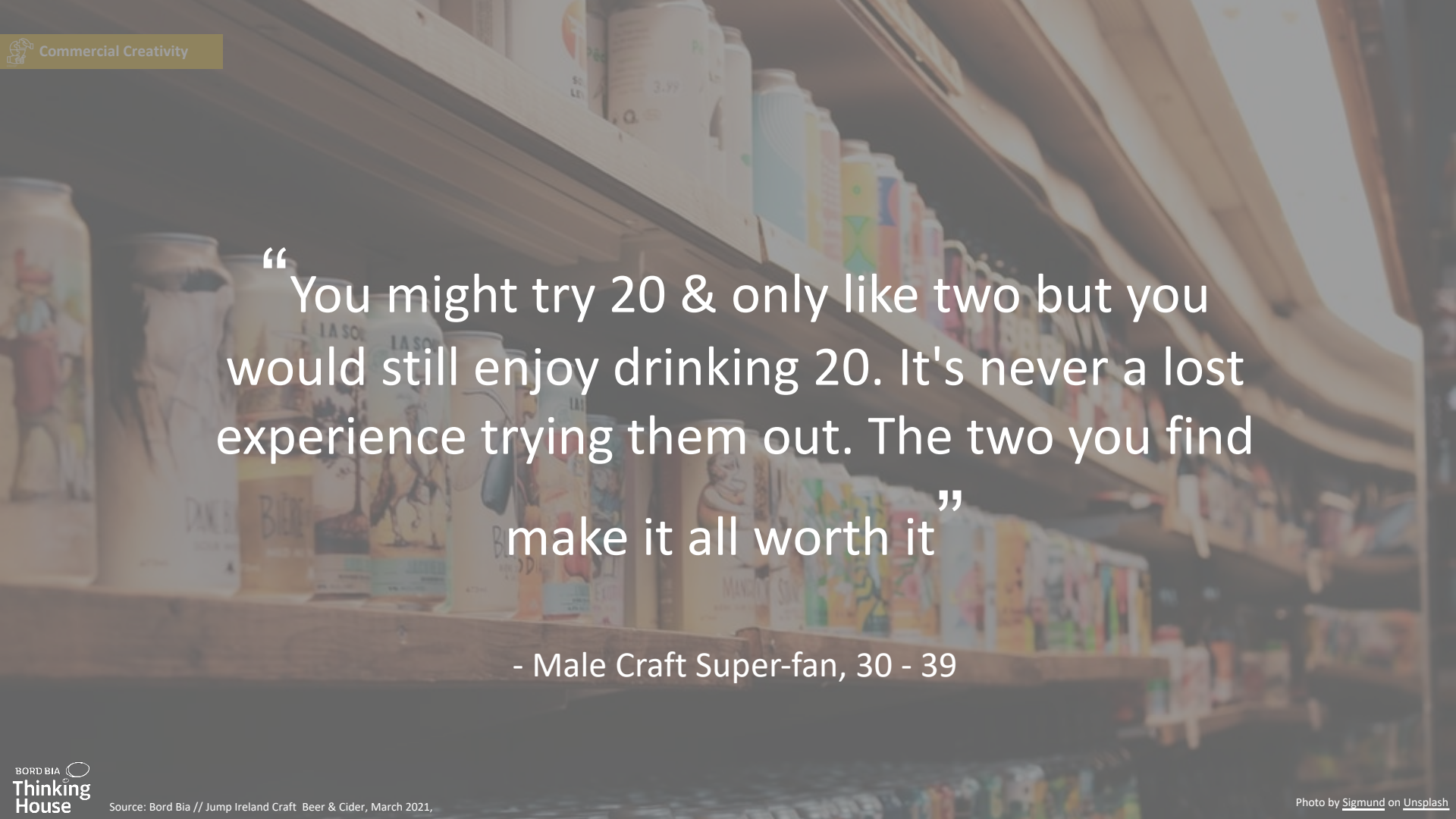
Innovative 31% ↑ *Craft Drinkers*

Adventurous 28%

"If I got a pint of one of the big guys, there's often little difference. But with two stout crafts, there'd be a huge difference"

- Male, 30 - 39

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,
Q8. When choosing a Craft Beer/Craft Cider, what are some of the key factors that you consider? Base Craft Drinkers n=286
Q9. Which, if any, of the following do you think describes Craft Beer/Cider in Ireland today? Base n=501



"You might try 20 & only like two but you would still enjoy drinking 20. It's never a lost experience trying them out. The two you find make it all worth it"

- Male Craft Super-fan, 30 - 39

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,

Photo by Sigmund on Unsplash



"It wasn't until I went to New York, I asked for a beer & got given a pale ale or something. I'd never tried anything like it before, it was a whole different experience with flavour. Then coming back to Ireland, noticing more taps in pubs & seeing there's a whole Craft thing here"

- Male Craft Super-fan, 30 - 39

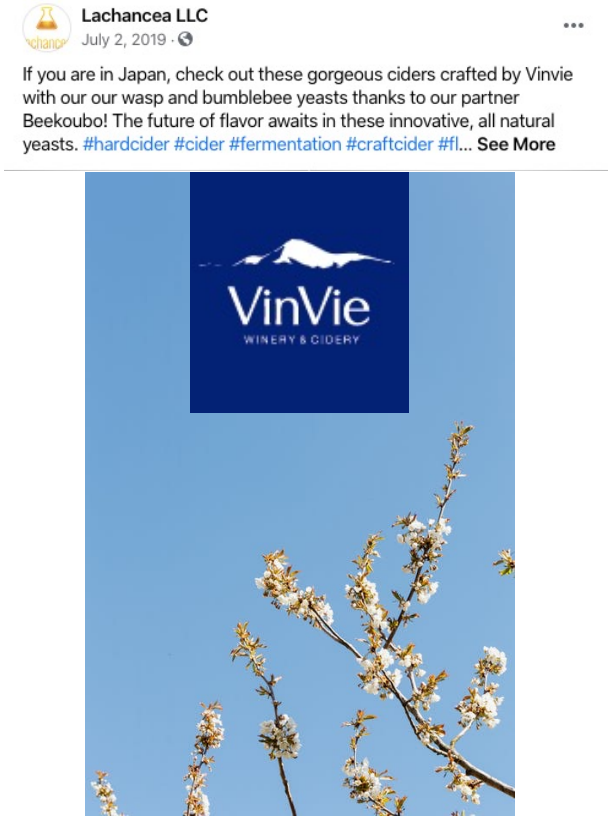
Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,

Photo by Joshua Earle on Unsplash

In Japan local alcohol firm **Vinvie** saw an opportunity in a cider as a result of consumers looking for lighter and lower alcohol options.

They recently created a **spiced cider** which is sweet but is spiced with cinnamon, cardoman, coriander, star anise creating a blend that can be drunk **hot or cold.**

They also recently launched **sour ciders** made from wasp yeasts & gose style (salty) ciders, again bringing something new to the cider category



Innovation in Cider is also welcomed, with some interesting things happening globally…

81%

Of millennials are interested in sampling new styles of cider (Mintel 2020)

Source: https://www.facebook.com/SourYeast/
https://www.foodnavigator-asia.com/Article/2021/02/17/Buzzing-brews-Japan-s-VinVie-sees-large-untapped-potential-in-local-cider-market-due-to-demand-for-lower-alcohol-options

>$25BN

Estimated Market Value for the Non-Alcohol Beer market by 2024

↑38%

Off premise non-alcohol beer sales in the US rising to $188m in 2020 with an expected growth 9.7% annually through to 2024

(IWSR 2020)

Non-alcohol beer makes up 12% of the German market



(IWSR 2020)

Non-alcohol beer makes up 11% of the Spanish market



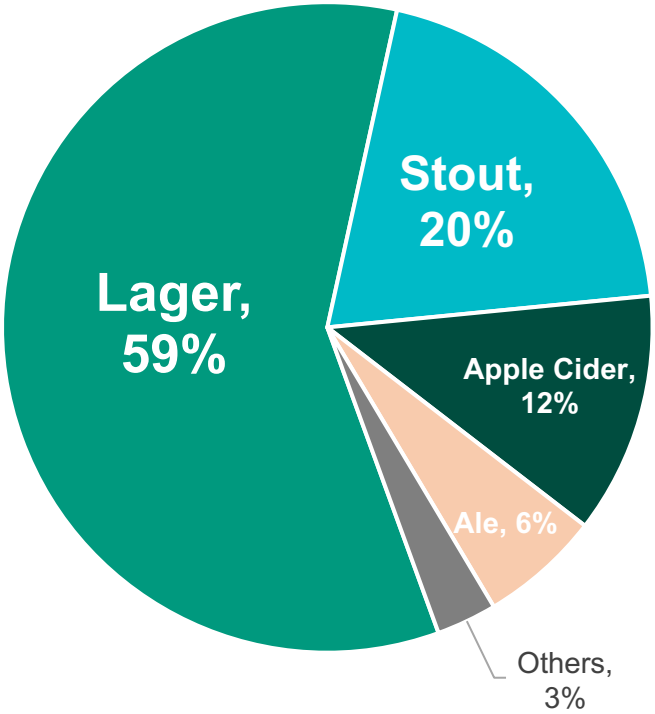
(IWSR 2020)

In a market where health & wellness is taking hold, there is a surging interest in NoLo products, presenting some commercial opportunities

"“There was a shift to low calorie categories—no alcohol beer, lower alcohol. I think that’s going to be it. This is playing into the whole health & wellness thing”

- Supermarket Buyer

Source: Non-Alcoholic Wine & Beer Market Share - Forecast Report 2025
Source: Beer & Cider Ireland Mintel June 2019
Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,



Note: 'Others' include: flavoured beer, wheat beer, flavoured cider.

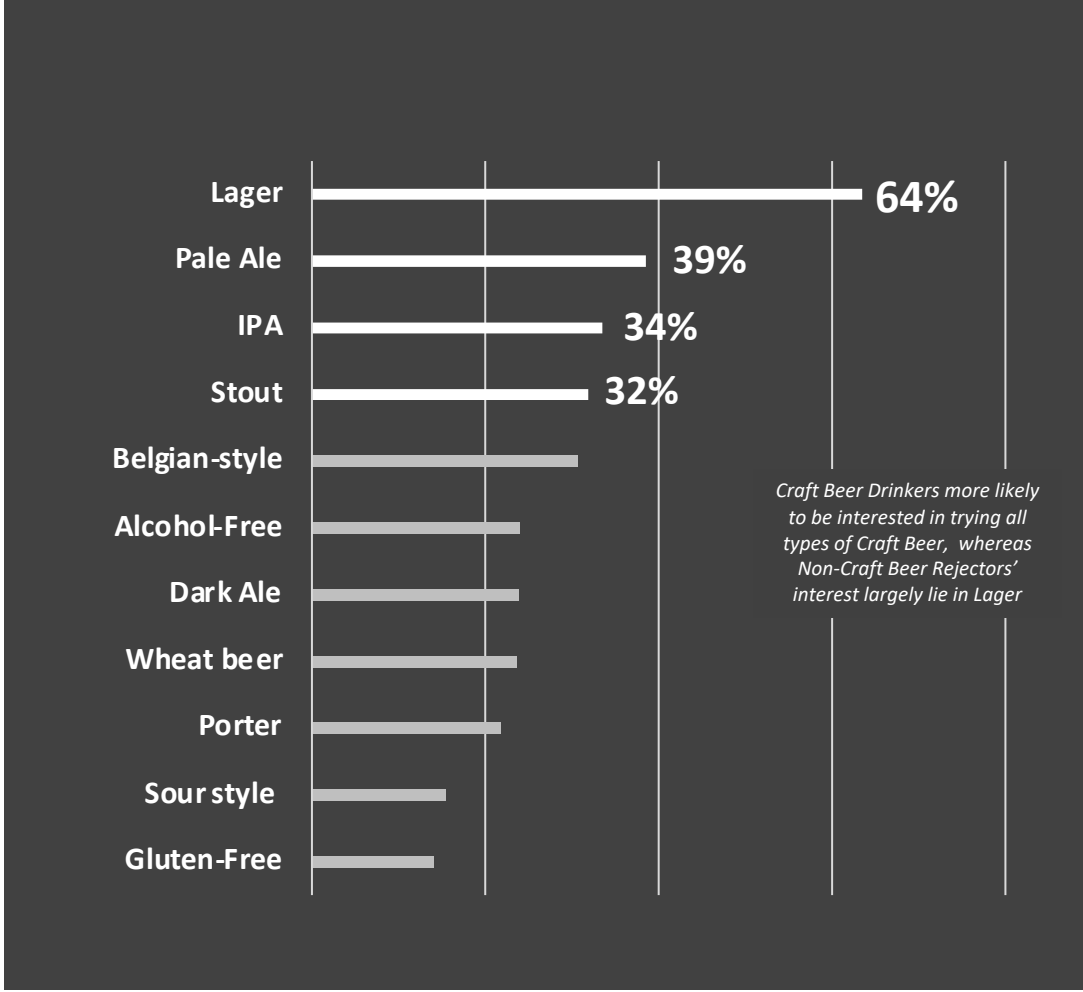
While there can be barriers to entry for lager, there is also an opportunity to innovate in this space

Lager & Stout lead the way for market share in Ireland in 2019. However, Craft Beer mostly plays in Ale & Stout

Source: Global Data, 2020.

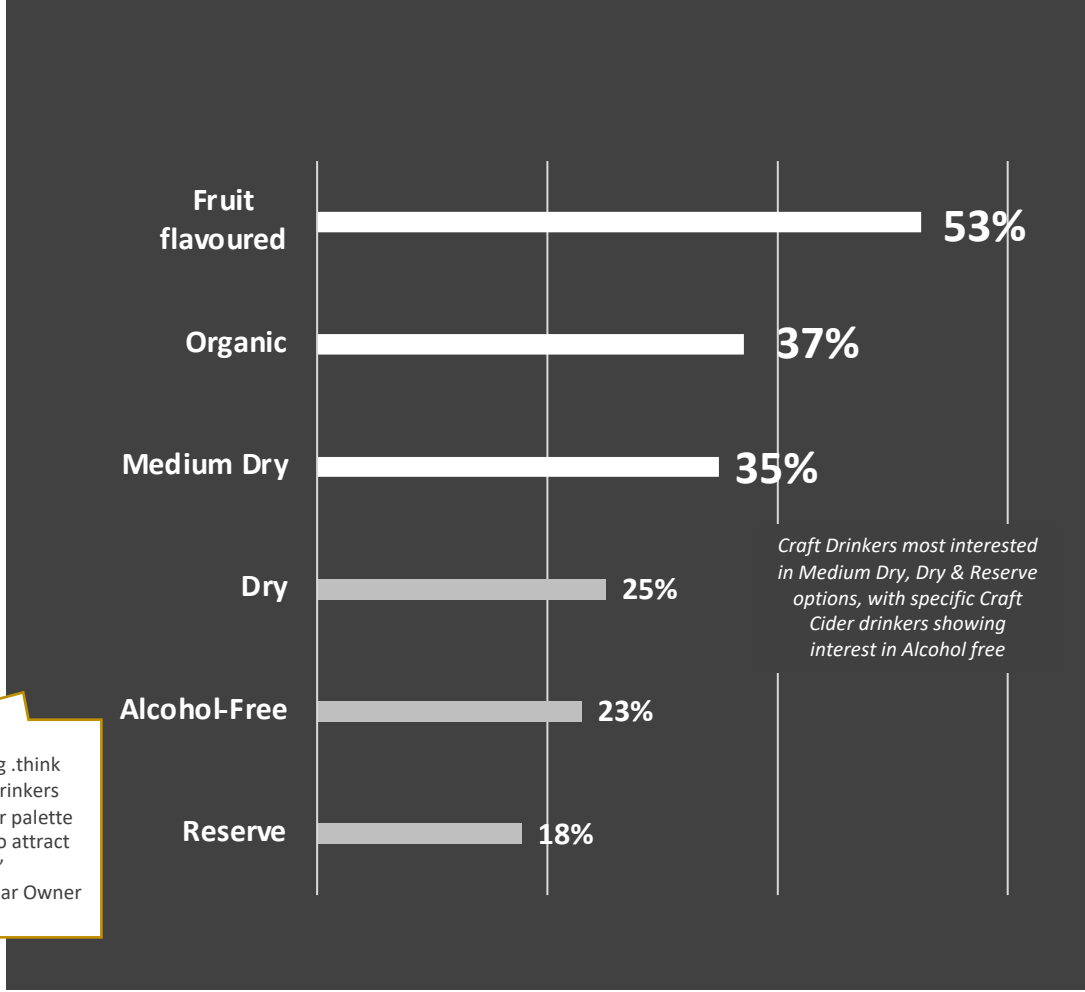
Interest in Craft Lager also came through in our study, potentially driven by desire for more sessionable craft

Interest also exists for more Pale Ale & Stouts



Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,
Q6. Thinking about Craft Beers that you might drink or try, which of the below are you interested in? Base n=501

When it comes to Craft Cider, Fruity types generates largest interest, with Medium Dry & Organic presenting some opportunity



"I think sour Craft is really interesting .think its an opportunity for new kinds of drinkers maybe its a lot for people to get their palette around first but you would be able to attract your koppaberg or bulmers drinkers"

— Bar Owner

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,
Q6B. Thinking about Craft Ciders that you might drink or try, which of the below are you interested in? Base n=501

From KFC to Chipotle, this year has seen food service swag enter the fray.

Stouffer, a frozen food brand known for its comfort food opened an online store:

"Over the past year, our fans have been asking about branded merchandise, so we went to work creating items that really double down on comfort & taste – the heart of our brand…It was a no-brainer to deliver even more comfort & coziness at a time when people need it most."

- Megan McLaughlin, Brand marketing manager

'Tis The Cheese'n: STOUFFER'S® Drops First-Ever Merch Collection Just In Time For The Holidays

Featuring comfy and unique swag ranging from insulated fanny packs for lasagna on-the-go to noodle-printed loungewear

"Merch" is another potential area to innovate & has proved popular during Covid-19 with the likes of food brands adding to their portfolio with "fashionable merch"

This is also something consumers appreciated when consuming on trade

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,
Source: https://www.forbes.com/sites/melissakravitz/2020/11/17/supermarket-swag-popular-food-brands-add-fashionable-merch/?sh=bf646141015a
https://www.prnewswire.com/news-releases/tis-the-cheesen-stouffers-drops-first-ever-merch-collection-just-in-time-for-the-holidays-301174451.html



Commercial Creativity
Sign Posts

BORD BIA Thinking House

Photo by sara-kurfess on Unsplash

SIGN POST #6 Playing With New Flavours Are A Win Within The Category

Consumers are looking to the Craft category for inspired flavours & are willing to explore. The trade are also keen to uplift their shelves with new & exciting flavour profiles. However, where possible experimentation should be done strategically, keeping in mind brand credibility, quality & confidence. Remember – Earn the right to experiment

47%

Interested in trying **fruity** Craft Beer flavours e.g. pineapple

45%

Interested in trying **Sweet** Craft Beer flavours e.g. honey

↑ *Craft Beer Drinkers*

31%

Interested in trying **Artisanal** Craft Beer flavours e.g. Belgian Chocolate

↑ *Craft Beer Drinkers*

Whose doing it well?

Fuzzy Beer

Fuzzy beer is fermented with native micro flora from a family farm in Missouri & aged on Missouri grown white peaches. Fermented in & aged in Chardonnay barrels. It ranked 25 in the top 40 most delicious beers in the US in 2020.



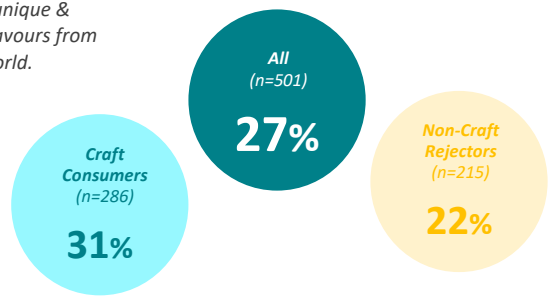
Commercial Creativity

SIGN POST #7 Leveraging Category Engagement

Inviting customers to create a product or even utilise worldly flavours is also a way to showcase & engage in flavour – adding an element of scarcity could help make it feel more exclusive

Craft is a category which has the potential to draw consumers in & enjoy high engagement. With one of it's biggest differentiators being it's unique taste profile, there is an opportunity to 'team up' with customers or look beyond for out of the box flavour profiles. To drive excitement these can be offered for a limited time

Brewed with unique & uncommon flavours from around the world.



46%

Claim that a message such as 'Seasonally brewed – **available for a limited time only**' would influence them to buy Craft Beer/Cider

51% Craft Beer Drinkers
40% Non-Craft Rejectors

Whose doing it well?

Perrin Brewing Co.

With people at home with limited activities Perrin Brewing Co invited customers to be involved in each stage of their next beer release through their Interactive Brew Project 2.0.

This was voted one of the best sales & marketing ideas in the US in 2020.

BEER

Interactive Brew | Perrin Brewing Company

PERRIN BREWING CO.

YOU choose the next Perrin BREW!

Join the Brewers of Perrin Brewing in crafting the next release from the Perrin Pub!

Every Friday at 4pm a poll will drop to customize the components of this next beer.

Week 1 – Vote on Style (Stout/Porter is the WINNER)
Week 2 – Vote on Style Sub-Category (Russian Imperial Stout is the WINNER)
Week 3 – Vote on spice or fruit additions (Chocolate Vanilla Marshmallow, Russian Imperial Stout!)
Week 4 – Submit a Name (over 400+ names!)
Week 5 – Vote on Top 7 Names (Self S'more-antine is the WINNER)

Pro tip: if the name submission form doesn't appear below – clear your web browser cookies

LIVE STREAM of the brewing process on Thursday, June 4 at 8:30AM

https://www.perrinbrewing.com/

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021
*See Appendix for statements & ideas tested

Source https://www.craftbrewingbusiness.com/business-marketing/the-25-best-craft-beer-sales-and-marketing-ideas-in-2020/

SIGN POST #8 Playing With New Formats Is Also A Potential Win Within The Category

To upgrade the potential social experience when consuming on trade, being creative with formats is something Craft Beer needs to strive more towards to enable it live in a more sessionable world

28%

Claim that a message such as '**Limited edition** product **labels designed by local artists** & creatives' would influence them to buy Craft Beer/Cider

"There's some (cans/bottles) that embody Craft more. It's a different shaped bottle, longer necks or they're stubby… there's a bit more about them."

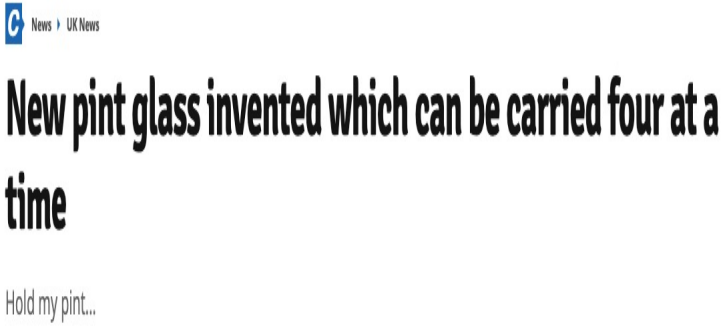
- Male, 30 - 39

Whose doing it well?

Carling

Disrupting in on trade will be ever more important in a post Covid-19 World.

Carling recently introduced new glass ware, which allows someone to hold 4 pints easily.


News › UK News

New pint glass invented which can be carried four at a time

Hold my pint...

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021
*See Appendix for statements & ideas tested

Source: https://www.chroniclelive.co.uk/news/uk-news/new-pint-glass-invented-can-16201441 / https://www.thesun.co.uk/money/8970438/carlings-new-glasses-four-pints-carry/

SIGN POST #8b Playing With New Formats Is Also A Potential Win Within The Category

"I'd love to see the introduction of a bottle that is elegant/user friendly…. Right now the big cans are a bit bulky looking & not something people want to walk around with in a bar, especially in a place like this where people are mainly drinking cocktails."

- Bar Owner

Whose doing it well?

Understanding the environment the beer is being consumed & purchased is important. This presents distinct format opportunities for gifting & in the on-trade & perhaps too for the take away pint!

Preferred format for Craft Beer/Cider

	Beer Drinkers n=428	Cider Drinkers n=300
	58%	53%
	25%	18%
	18%	28%



Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021
*See Appendix for statements & ideas tested

SIGN POST #9
Beers With Benefits

Exploring the NoLo & Lager opportunities

Tapping into the NoLo, lager or even other 'added benefits' alternatives could be a strategic innovative move to meet growing consumer interest. However, these need to be grounded in quality, particularly in NoLo where consumers are no longer willing to comprise on taste for lower ABVs

24%

Claim to be interested in **Alcohol-free** Craft Beer

22%

Would consider having more Craft Beer/Cider if they had **healthier** options

"Even the most casual drinker is not impressed by the 7% blow your head off hop explosion—you actually find lower ABV are more popular now."
- Supermarket Buyer

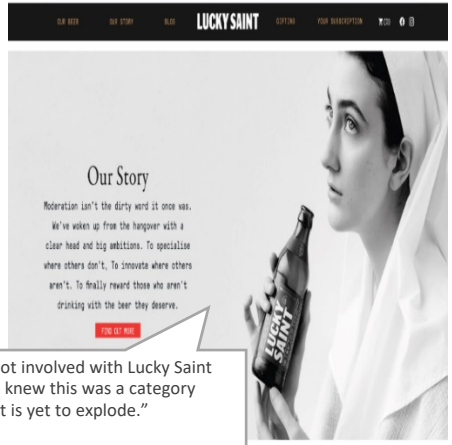
"Why aren't the Craft guys popping out a mass-produced lager?"

— Bar Owner

Whose doing it well?

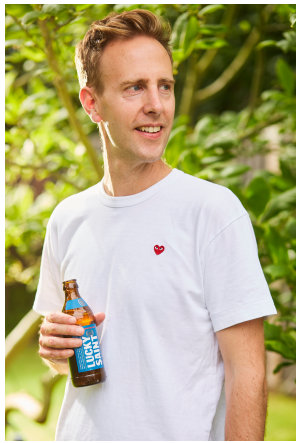
Lucky Saint

Luke Boase identified the opportunity for an alcohol free beer but also specifically sought to create a lager which as a type of beer is known for its incredible heritage. He set about developing a pilsner style lager (at 0.5% volume), made using traditional style processes with a 6 week brew time, striving to deliver the best in quality standards. There is no compromise



"I got involved with Lucky Saint as I knew this was a category that is yet to explode."

— Emma Heal



Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021
*See Appendix for statements & ideas tested

Source: pictures complements of lucky saint

Commercial Creativity

SIGN POST #9b
Beers With Benefits

Countering the NoLo movement with the "how high can you go"

NoLo growth does not mean Craft consumers are no longer interested in experimenting with potent Craft. Rather, it's about recognising that each have a role to play in specific occasions & for certain need states. For example, where a high ABV Craft may not be deemed suitable for 'sessionable' drinking occasions, it can create buzz for a special / limited experience

2 in 10

Craft drinkers will consider an **High alcohol content** when selecting Craft Beer/Cider

45%

Claim that a message such as '**Limited edition Craft Beer/Craft Cider** – only 1,000 cans/bottles brewed' would influence them to buy Craft Beer/Cider

51% Craft Beer Drinkers
37% Non-Craft Rejectors

Whose doing it well?

Brewdog & Schorschbrau

Brewdog & a German beer company (Schorschbrau) have partnered to create the strongest beer in the world
"Strength in Numbers" is officially the worlds strongest beer at 57.8%.

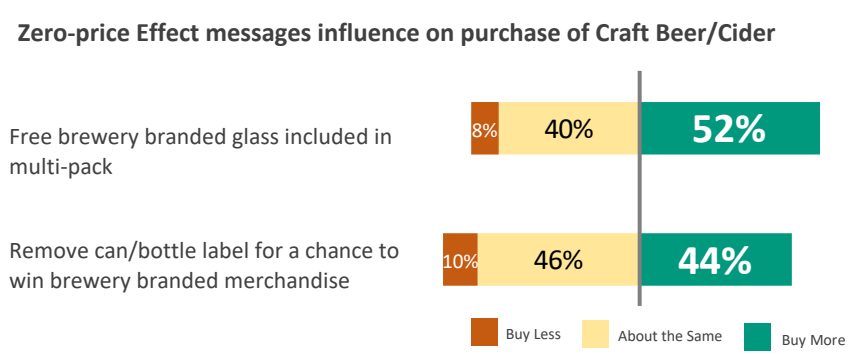
This beer has been barrel aged for 10 years & produced via a traditional Eisbock method, meaning the beer is frozen & the ice is removed to leave a concentrated liquid..
The beer sold out in one day, priced at £29 for one bottle

57.8%

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021
*See Appendix for statements & ideas tested

SIGN POST #10
What's Your Swag?

Craft branding, label designs & the 'real' stories behind the brand, can play a key role in bringing people into the category & creating strong brand followings. Creative merchandising ideas can help drive this & build brand equity



Whose doing it well?

Craft beer brands are ripe for merchandising everything, from key chains to stickers and t-shirts. But 2020 saw a whole new range of merchandising to fit with the new drinking experiences, some of the best beer swag noted by Hop Culture includes outdoor glasses, portable cases and growlers..

Merch has become commonplace across a range of sectors including pizza houses and coffees shops. Pictured on the right here is a limited edition tote from Hatch coffee house in Glasthule, Co Dublin. These bags were designed to communicate their "hatch" set up which was/is "on trend" in a covid world. (June 2020)



Source https://www.hopculture.com/best-beer-swag-brewery-merch/
Source: picture : complements of hatch, glasthule

SIGN POST #11
The Omnichannel Opportunity

Being innovative with channel strategy is also important

Whilst accessibility for Craft is improving, there's greater acceptability for searching for Craft brands online, especially in a category recognised for having independent players. Done correctly, this can give greater control over how a brand is positioned, whilst also being a potential tool be demonstrate success & confidence when approaching trade

+4%

More likely to purchase Craft Beer from **Online off-licence** than mainstream Beer

3 in 10

Already purchase Craft Beer **directly from Brewers Craft**

Whose doing it well?

Lucky Saint

Building their brand across channels has been key to the Lucky Saint Success Story. Covid-19 forced the business to expand their channel strategy.

Originally heavy reliant in the on-trade, they are now having equal success across on-trade, retail & direct to consumer & have seen business thrive from what was a difficult start in the early Covid-19 phases.



Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021
*See Appendix for statements & ideas tested

Source: pictures complements of lucky saint

3.3 Collaborations & Connections



Photo by Dwayne Legrand on Unsplash

The rise of collaborations & micro collaborations is ‘de rigeur’ globally

The Craft Beer category is no exception

“The major takeaway for 2020 was collaboration. Not only between breweries but between breweries & communities”

-Vinepair Staff

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,

Collaborations are as much about content as they are about product…

Lyft (taxi service) partnered with Chicago brewer Baderbrau brewing to create a limited edition brand called ‘Five Star Lager.’ Selling exclusively in bars, those who purchase the drink were given 60% off their next lift/ride





Source: https://hypebeast.com/2018/1/lyft-beer-five-star-lager-chicago

From a consumer perspective, collaborations also provide novelty, fun & create a wider brand experience

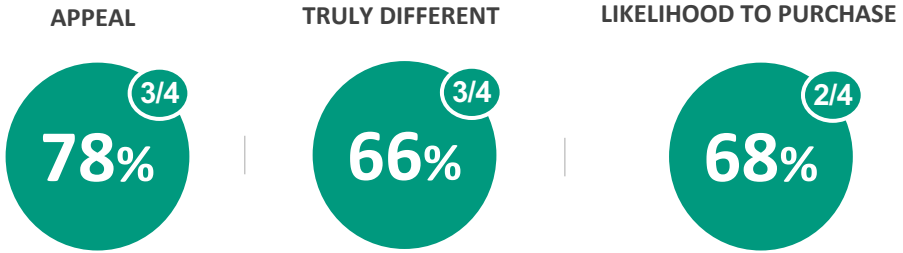
However, collaboration for collaborations sake, without purpose may have limited appeal & lack distinctiveness

The Collaboration positioning tested in our study showed **potential** but performed **low on appeal & differentiation**. However, nearly two thirds were still **likely to purchase** which would suggest there is room to **grow & innovate in the Irish market**

STATEMENT TESTED:

Collaboration is part of our DNA. We partner with like minded people to create **one of a kind Craft Beers & Craft Ciders for you to enjoy.**

This includes: labels designed by local artists; personalised subscription boxes; Craft Beers /Craft ciders created with Irish & international brewers



Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021
Q16A Collaboration - How appealing is this Craft Beer/Craft Cider idea to you? Base n=501
Q16B Collaboration - This idea is truly different from other Craft Beers/Craft Ciders I've seen before. Base n=501
Q16C Collaboration - How likely do you think people like you would be to buy a Craft Beer/Craft Cider like this? Base n=501

When it comes to culinary collaborations, food & Craft often go hand in hand

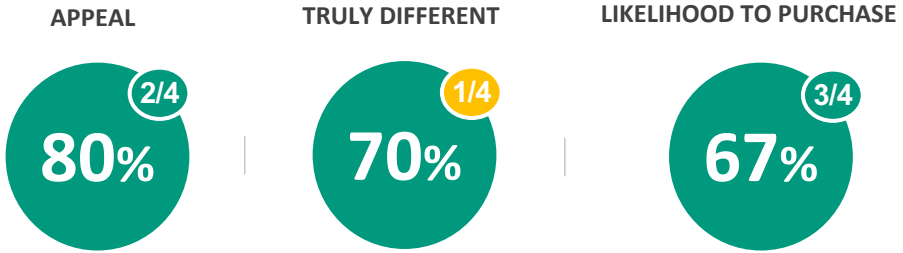
Consumers consider food friendly pairings as a real opportunity for Craft producers to explore

The Food Friendly positioning tested in our study received **positive reception**, seen as the **most unique** having strong appeal & purchase intent. This further leans towards **Craft elevating beer drinking moments** during quieter occasions

STATEMENT TESTED:

We take a **culinary approach to flavour innovation** to create Craft Beers & Craft Ciders that **enhance the food experience**.

This includes: food pairing recommendation on our can/ bottle; unique & uncommon flavours from around the world; partnerships with local food producers, & working with Michelin chefs & sommeliers.



Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021
Q16A Food Friendly - How appealing is this Craft Beer/Craft Cider idea to you? Base n=501
Q16B Food Friendly - This idea is truly different from other Craft Beers/Craft Ciders I've seen before. Base n=501
Q16C Food Friendly - How likely do you think people like you would be to buy a Craft Beer/Craft Cider like this? Base n=501

Covid-19 has also changed our relationship with food & drink, becoming THE social activity…

Where home indulgence took precedence, this presented new opportunities to engage, retain & create new Craft & Food pairings moments

35%

Of Craft drinkers typically drink Craft Beer/Cider with a meal

23%

Would be interested in Food pairing recommendation on every can/bottle

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,
Q11. Thinking of the times you have had Craft Beer and/or Craft Cider, which of the following occasions would you typically drink it? Base Craft Drinkers n=286
Q16D Food Friendly - Finally, thinking about the features which are part of this idea, which is your favourite?

However, as we move into a post-Covid-19 world we also need to consider how we expand these moments into the on-trade occasions…

For example asking the questions (i) how will consumers want to see us show up (ii) how has price perceptions changed

“Lets see how on-trade combats with the 9 euro beers when the lads have been drinking 4 at home for a €10?”

-Bar Owner

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,

…In that sense, both on & off trade are also keen to establish robust partnerships & even collaborate with Craft Brewers

"[It's] a lot of fun working with new [Craft] suppliers, the energy they bring to it, it's really infectious... ..there's a dynamic that's really exciting to work with"

— Supermarket Buyer

"Our Craft Beer customer spends a lot more time with us than our average customer. It's approximately twice the average spend…the data would tell us that the Craft Beer customer is a very important customer to us"

— Supermarket Buyer

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,



Collaborations & Connections
Sign Posts

BORD BIA Thinking House

Photo by sara-kurfess on Unsplash

SIGN POST #12
Grub Up!

Create more experiential moments by partnering with food companies or creating your own in-house food experience

Introducing Craft as the perfect food compliment with considered recommendations, particularly when in collaboration with an authority in the space drives interest. This could be an opportunity to be innovative & create social Craft moments

Brewed to excellence in collaboration with Michelin chefs & sommeliers



1. What's your collaboration plan?
2. What businesses could you partner with?
3. Could you develop some online partnerships?

Whose doing it well?





Food & Drink: Taco Spaceship lands at Fortside Brewing

Truck's fusion tacos pair perfectly with locally made brews

By Rachel Pinsky
Published: October 4, 2019, 6:02am

Share:

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021
*See Appendix for statements & ideas tested

SIGN POST #13 In-home Indulgence

Consider ways to enhance the home indulgence moment through collaborations

Home indulgence can manifest in many ways. In our study*, there was interest in collaborations which resulted in 'new' Craft experiences, which could be consumed as 'treats' or as moments to savour. Variety boxes largely presented gifting ideas, as another way of sharing Craft moments & savouring / exploring taste profiles

1/3

Claim that a message such as 'We collaborate with other Irish breweries to **create new Craft beers & Craft ciders**' would influence them to buy Craft Beer/Cider

2/10

Claim that offers such as 'A **personalised subscription box** with a variety of Craft Beers and/or Ciders from **different Irish breweries**' would influence them to buy Craft Beer/Cider

Whose doing it well?

Harpoon & Dunkin Donuts

Harpoon and Dunkin Donuts have come together to create a range of collaborations including an IPA brewed with real donuts and raspberry jelly puree.

HOME > NEWS

These New Dunkin' Beers Are Made with Actual Donuts

Are you ready for a Dunkin' Jelly Donut-infused hazy IPA?

By Mike Pomranz | August 25, 2020

Tupelo Honey

Mishelle De Tillio, Certified Cicerone in Tupelo Honey, a renowned restaurant in Asheville, North Carolina, has an exclusive beer menu called Ahabs Locker. This selection includes "white whales" rare and difficult to find brews often presented in wine bottles. People feel they are getting something really exclusive and are worth paying more for

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021
*See Appendix for statements & ideas tested

Sources: https://news.dunkindonuts.com/news/harpoon-dunkin-new-coffee-donut-beers
https://daily.sevenfifty.com/6-ways-to-upsell-craft-beer-at-restaurants/
https://www.foodandwine.com/news/dunkin-harpoon-coffee-donut-beer-2020

SIGN POST #14 Homework 4 Partnerships

Find unique ways to build partnerships with trade and even with each other & demonstrate how you can become a value accentuator

Do your homework & ask yourself;

1. What problems can you solve for a potential trade partner?

2. How can you make life easier for them?

3. Can you demonstrate agility and forward thinking?

Identifying the 'problem' you can solve – either through product, process or your differentiation, can set you apart & help build long lasting partnerships with trade, who are looking to brewers to offer solutions & value

"If they come in ready to hit the ground running, having done a lot of the ground work that needs doing, all that paper work, that would be a great start…"

- Supermarket Buyer

" We have stores all over the country, if they could find a way to distribute to all of them that would make a difference…"

Off license

52%

of UK beer-buyers & consumers agree a good selection of Craft Beers would make **them choose one supermarket over another**

- (Mintel Oct 2019)

Whose doing it well?

Canarchy

Canarchy are currently one of the most successful craft breweries in America. They are a craft beer collective consisting of 7 breweries. Whilst they lost 40% of their revenues over night in the early phases of Covid, they are now growing their way through the pandemic, "We are looking at things on an individual basis and comparing brands to brands and making production decisions based on what we have on hand and what we have allocated", Collective President Matt Fraser explained. "For instance if 6 packs of Cigar City Jai Alai IPA are ever running low but there are plenty of 12 packs out in the market place, CANarchy will quickly adjust its packaging plans to make sure distributors get stocked with fresh sixers that are moving faster. It's required us to look more forward than backwards." Canarchy Chief Commercial Officer, Chris Russell


Forbes

How CANarchy Craft Brewery Collective Is Growing Through The Pandemic

Chris Furnari Contributor

Follow

Listen to this article now

Powered by Trinity Audio

CANARCHY

CRAFT BREWERY COLLECTIVE

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021
*Source: : Lightspeed/Mintel Why Beer will lose if Craft brewers go under, 2020 Base: UK: 1,221 18+ who have drunk & bought beer in the three months to Oct 2019;

Source https://www.forbes.com/sites/chrisfurnari/2020/08/21/how-canarchy-craft-brewery-collective-is-growing-through-the-pandemic/?sh=3bdf911e7345

SIGN POST #15 Creating Craft Insiders

Create engagement with staff through education, tastings, enable the trade to become “Craft insiders.”

Creating an authentic connection with the trade or even allowing them to own part of the brand story can lead to bigger buy in. In this category, consumers are also looking to authoritative recommendations as a sure mark for quality & creditability and this can even come from bar & restaurant staff who they can look towards for inspiration

> “It has become nearly like wine tasting in that you’re trying to find one you like…one or two pubs here would recommend a Craft as a food compliment”
>
> - Male 40-55

> “[With spirits] We would really push for that educational route a lot… we really like that collaborative effort of working with people.”
>
> - Bar Owner

Whose doing it well?

Omeca Altos

Omeca Altos Tequila was voted the most popular tequila of 2020 according to The Punch.

The tequila was created by bar tenders & often drunk by bar tenders which in itself is often a guarantee of success



Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021
*See Appendix for statements & ideas tested

Source https://punchdrink.com/articles/bartenders-well-has-changed-best-spirits-2020/

3.4 Care & Community



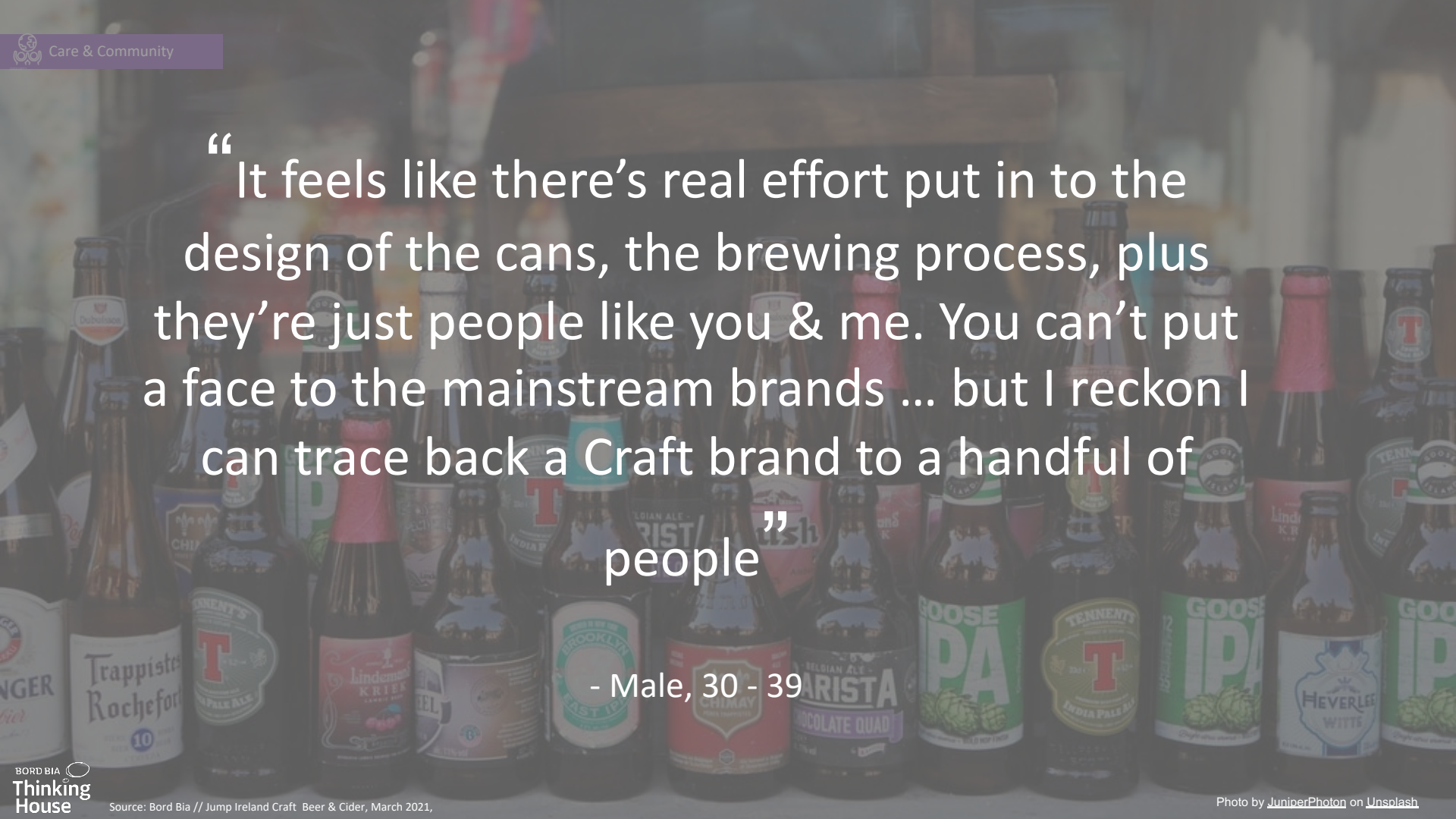
BORD BIA Thinking House

Photo by Josh Olalde on Unsplash

Craft Beer companies are considered to pride themselves on care & attention to detail

They are known for their human touch





"It feels like there's real effort put in to the design of the cans, the brewing process, plus they're just people like you & me. You can't put a face to the mainstream brands … but I reckon I can trace back a Craft brand to a handful of people"

- Male, 30 - 39

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,

Photo by JuniperPhoton on Unsplash

They are also considered to be “local” & we know people want to support local & Irish, with Covid-19 enhancing that ever more

34%

Would consider drinking Craft Beer to support local

23%

Of Craft drinkers were prompted to drink Craft to support local/Irish business

40%

Of Craft drinkers cite Brewed locally as key when choosing a craft

“Buy Irish won’t go away, a really big positive during Covid-19, we have to support local businesses”

- Bar Owner

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,
Q8. When choosing a Craft Beer/Craft Cider, what are some of the key factors that you consider? Base Craft Drinkers n=286
Q10. What prompted you to start drinking Craft Beer and/or Craft Cider? Base Craft Drinkers n=286
Q13. Which, if any, are reasons you would consider either trying a new / drinking more Craft Beer and/or Craft Cider? Base n=501



“The Craft Beer thing is so hyperlocal. That’s what I see the future of it is”

- Bar Owner

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,

Photo by JuniperPhoton on Unsplash

But the idea of what a community is has broadened. The rapid adoption of platforms like Zoom allowed many to explore new types of communities, which can present real opportunity to build a following

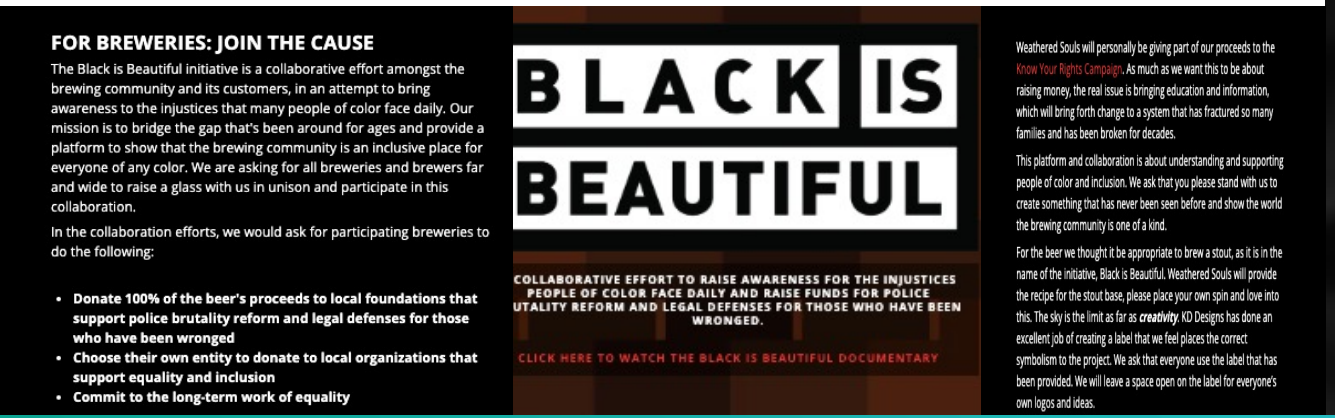


SOURCEPEXELS:@COTTONBRO

Oozlefinch Beers + Blending Fort Monroe, VA, USA partnered with Hop Culture Magazine hosted the worlds largest digital Craft Beer festival

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,

Breweries are joining the Black is Beautiful initiative in the US. This initiative started by Weathered Souls brewing company to raise funds for local groups that support social justice causes including Black Lives Matter. They invited brands to create a stout beer & to donate proceeds to organisations that support quality & inclusion.
More than 1200 breweries have signed up across 50 states & in 21 countries have agreed to take part



FOR BREWERIES: JOIN THE CAUSE

The Black is Beautiful initiative is a collaborative effort amongst the brewing community and its customers, in an attempt to bring awareness to the injustices that many people of color face daily. Our mission is to bridge the gap that's been around for ages and provide a platform to show that the brewing community is an inclusive place for everyone of any color. We are asking for all breweries and brewers far and wide to raise a glass with us in unison and participate in this collaboration.

In the collaboration efforts, we would ask for participating breweries to do the following:

- **Donate 100% of the beer's proceeds to local foundations that support police brutality reform and legal defenses for those who have been wronged**
- **Choose their own entity to donate to local organizations that support equality and inclusion**
- **Commit to the long-term work of equality**

Weathered Souls will personally be giving part of our proceeds to the Know Your Rights Campaign. As much as we want this to be about raising money, the real issue is bringing education and information, which will bring forth change to a system that has fractured so many families and has been broken for decades.

This platform and collaboration is about understanding and supporting people of color and inclusion. We ask that you please stand with us to create something that has never been seen before and show the world the brewing community is one of a kind.

For the beer we thought it be appropriate to brew a stout, as it is in the name of the initiative, Black is Beautiful. Weathered Souls will provide the recipe for the stout base, please place your own spin and love into this. The sky is the limit as far as ***creativity***. KD Designs has done an excellent job of creating a label that we feel places the correct symbolism to the project. We ask that everyone use the label that has been provided. We will leave a space open on the label for everyone's own logos and ideas.

Community Collaboration has also been significant since Covid-19 - from supporting dog shelters to cancer charities, this last year saw enormous good will & collaboration within the industry

Within Care & Community, sustainability is also a key priority, particularly within retail who may have their own ambitions



"Sustainability is front & foremost. That will come up with any discussion you have with us now"

- Supermarket Buyer

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021,

Photo by Nariman Mesharrafa on Unsplash

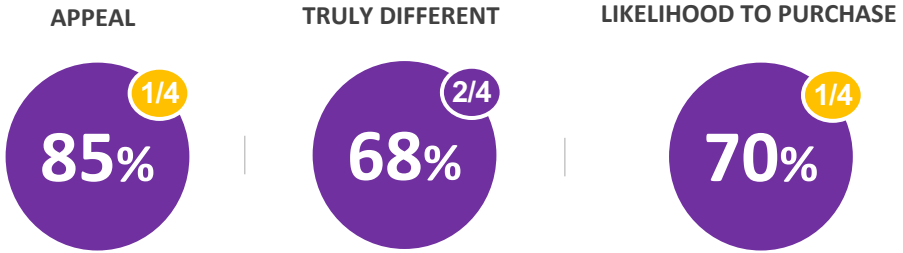
Sustainability is also important for consumers who have a growing expectation for businesses to demonstrate sustainable packaging & production

The Eco friendly positioning tested in our study received **positive reception across metrics**. However, it is important to note that as times goes on, these practises may **become the expectation** rather than a unique selling point

STATEMENT TESTED:

We focus on delivering Craft Beer & Cider that **minimises the impact our brand** has on the **environment from production through to packaging**.

This includes: off setting of carbon emissions; percentage of sales to environmental organisations; 100% recycled packaging; preservation of local biodiversity & the use of locally sourced ingredients.



Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021
Q16A Eco Friendly - How appealing is this Craft Beer/Craft Cider idea to you? Base n=501
Q16B Eco Friendly - This idea is truly different from other Craft Beers/Craft Ciders I've seen before. Base n=501
Q16C Eco Friendly - How likely do you think people like you would be to buy a Craft Beer/Craft Cider like this? Base n=501



Care & Community Sign Posts

BORD BIA Thinking House

Photo by sara-kurfess on Unsplash

SIGN POST #16 Understand The New Craft Communities

This is an opportunity to RETAIN a lot of the new Craft Beer moments created during Covid-19

While meeting friends & family in person is a priority now, people have established new friendships, engaged with new groups & defined new drinking occasions for Craft Beer

It will be important not to lose these moments but to build & enhance them in new ways

To build on this opportunity there are a number of considerations:

1. Who are these consumers, how do these communities break out: do they live around the world, are they new to Craft Beer, are they local to your street, etc?
2. Understanding how they define these occasions: the moments, the way the drinks are presented
3. Does this create a whole new “table” opportunity?
4. If this is about outdoors, how does your beer show up, is there an online way it should be displayed, is there a way to swag here
5. Understanding the purchasing /channel experience: is this about D2C, is it about is it about take away pints?
6. Is there an opportunity to create loyalty schemes, rewards programmes for these communities
7. Could you create a new event?

Whose doing it well?

Craft for Office Functions

Threes Brewing created new packs/gifts for office functions at home during Covid-19

THREES BREWING



Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021

SIGN POST #17 Communicate & Build Your Eco Credentials

Every little helps & communicating any practises that demonstrate support for the environment will be appreciated.

Honesty is a priority. People understand its hard for small businesses & would prefer an authentic approach to addressing sustainable practises.

Establishing partnerships is one way to making a more positive impact & finding a cause that is true to your business & business values

Consumers will engage with brands who deliver on strong eco credentials, providing them with greater reason to believe in the brand. In this category, it can also support premiumness perceptions

- Sustainable production?
- Packaging & supply chain
- Empower consumers
- Support Trade's eco story
- Regenerative agricultural practices

FOOD FOR THOUGHT

Good News For 'Green' Brews: Consumers Say They'll Pay More For Sustainable Beer

A majority of 1,000 US beer drinkers surveyed in a study highlighted in NPR say they are willing to pay more for sustainability produced beer and on average say they would pay around $1.30 more for a 6 pack

Whose doing it well?

Dancing Gnomes Watershed

Dancing Gnomes Watershed is the first in a year long collaboration with a local artist Rosalie Haizlett & Pittsburgh's Nine Mile Run Watershed Association, now known as Upstream Pittsburgh. Every month they are releasing a new beer with new artwork from Haizlett that celebrates the ecology of rivers & streams of Western Pennsylvania with part of the proceeds being donates to Upstream Pittsburgh.



Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021
Source: https://www.npr.org/sections/thesalt/2018/10/13/656608166/consumers-say-theyre-willing-to-pay-more-for-beer-when-it-s-produced-sustainably?t=1623690771662
Source: Complements of Dancing Gnomes

SIGN POST #17b Communicate & Build Your Eco Credentials

Communicating in a language consumers understand is also important.

People increasingly want to do what is right by the environment, they want to be included but to do so they need to be communicated with in a way that is transparent, comprehensive & inclusive

Sustainable production?

Packaging & supply chain

Empower consumers

Support Trade's eco story

Regenerative agricultural practices

3 in 10

Of **Craft Drinkers** claim Irish ingredients e.g. Irish grown hops, is a key consideration when buying Craft

Whose doing it well?

Lion

Lion New Zealand has achieved zero carbon status. Reducing carbon emissions at every point in the production process from growing hops, to better product shelf life. They have also put a solid offsetting scheme in place



Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021

Source: lionco.com

SIGN POST #18
Be Known For Your Eco Creds

This is also about building your credibility!

If you are part of any associations, talk about it. Showcase what you are doing!

While the overall Eco Friendly positioning was appealing, there was nearly equal interest across the top 3 ways which this could be implemented – all of which can be communicated either on pack on via communications

TOP 3 OUT OF 5 FEATURES



Non-Craft Rejectors are slightly more interested in 100% recycled packaging. However, no other notable differences between the groups for other Eco Friendly features

Whose doing it well?

Ramborn

Ramborn is the third cidery in the world to receive B Corp status & the first consumer brand in Luxembourg.

Their website demonstrates tangible evidence of their environmental goals & achievements



Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021
*See Appendix for statements & ideas tested

Care & Community

SIGN POST #19 Community Actions "Together"

Many collaborative community actions have resulted in extremely powerful human stories during 2020 & 2021.

People have relied on brands & businesses to facilitate & help those in difficult situations.

As well as celebrating brands who take on local initiatives that deliver community benefits

Retailers have also played an extremely important role during Covid-19 & as we come through Covid-19, we may need new ideas to engage with communities.

As we come out of Covid-19 some of our habits & perceptions of retail & what we might expect from a brand may evolve. Community & Care can mean looking into partnerships with trade; What local initiatives can you consider to support local in partnership with trade? How can you help them do better? Could you use some technology partner to facilitate this dynamic?

82%

Of Irish adults feel the supermarkets are deemed more critically important to continue their normal operations than schools.

- (Bord Bia Indicators Barometer, Oct 2020)

"People are in supermarkets browsing around more trying to make life a bit more exciting… you're opening yourself up to things that maybe you wouldn't have always."

- Female, 25 - 29

Whose doing it well?

Too Good To Go

Too Good To Go, is an app that teams up with local retailers & eateries to help them sell perishable products to consumers at reduced prices before they are binned. The app which is free, allows retailers to sell products that would have otherwise been wasted, with savvy users saving money & food from waste.



Hawkes

In 2019 Hawkes created "This is London" their first cider made with 100% donated London apples & has since rolled it out regionally. 100% of the profits from this range go to Social Orchards Urban Planting.

"You can get a box from us anywhere in the UK capable of holding up to 80 apples – fill it up & we turn it into cider". Simon Wright, Hawkes Cider



https://www.google.com/url?sa=i&url=https%3A%2F%2Fwww.flickr.com

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021

Source Wall Street Journey, https://www.standard.co.uk/lifestyle/london-life/too-good-to-go-meet-the-app-creators-that-are-helping-london-restaurants-to-cut-down-on-waste-a3359626.html
https://www.itv.com/news/london/2020-08-14/waste-not-want-not-how-ugly-and-unwanted-apples-are-being-pressed-into-london-cider, https://www.bn1magazine.co.uk/brewdog-cider-arm-hawkes-calls-for-apple-donors-in-brighton/

SIGN POST #20 Create & Celebrate Local & Origin Stories

Part of what people like about Craft is the local, small, personable stories & the 'made with care' perception that comes with this

Craft brands need to find different ways to tap into local stories, from ingredients to working with local chefs, there are lots of ways to celebrate local & demonstrate made with care

There is interested & also pride in buying Irish made products, which is clear within this category. Where these stories can be leveraged to deliver truly exciting content & product, consumers are likely to engage

72%

Claim to be interested in **Irish** Craft Cider

49%

Describe Craft as **Local/Irish**

1. Could you play to single origin?
2. Could you play to wine cues?
3. Could you grow unique ingredients to create a distinct USP?
4. Are their any local crops or foods being grown that you could use?

Whose doing it well?

Tokyo Rose

Tokyo Rose which is New Zealand Capital's Cider uses Akane apples, a variety which were originally grown in Japan.





Granny Smith & Golden Delicious

Granny Smith & Golden Delicious are gaining momentum in South Africa, with Sxollie

Experimenting with these varieties

Source: Bord Bia // Jump Ireland Craft Beer & Cider, March 2021

Source Wall Street Journey, https://www.standard.co.uk/lifestyle/london-life/too-good-to-go-meet-the-app-creators-that-are-helping-london-restaurants-to-cut-down-on-waste-a3359626.html
https://www.itv.com/news/london/2020-08-14/waste-not-want-not-how-ugly-and-unwanted-apples-are-being-pressed-into-london-cider, https://www.bn1magazine.co.uk/brewdog-cider-arm-hawkes-calls-for-apple-donors-in-brighton/

Sign Postings For Future Growth

Credibility & Confidence

- #1 Using transparency to communicate a quality stories
- #2 Know your fit & difference
- #3 Building Quality & Credibility through Content Creation
- #4 Shout about awards
- #5 Earn your right to experiment

Commercial Creativity

- #6 Playing with new flavours
- #7 Leveraging category engagement
- #8/ #8b Playing with new formats
- #9/ #9b Beers with benefits
- #10 What's your swag?
- #11 The Omnichannel Opportunity

Collaborations & Connections

- #12 Grub Up!
- #13 In-home Indulgence
- #14 Homework 4 partnerships
- #15 Creating Craft insiders

Community & Care

- #16 Understand the new Craft communities
- #17/ #17b Communicate & build your eco credentials
- #18 Be known for your eco creds
- #19 Community Actions "Together"
- #20 Create & Celebrate local & origin stories

4.0 Tools to work with



Photo by Jon Parry on Unsplash

Responding to Credibility & Confidence

Q:
How would our brand have to look?

A:

Q:
How would our brand have to talk?

A:

Q:
What would our product portfolio
look like, how “quality” focused are we?

A:

Q:
What steps do we need to take to get trade ready?

A:

Responding to Commercial Creativity

Q:
What flavours/ABVs could we experiment with?

A:

Q:
What formats should we look at?

A:

Q:
Consider the role of occasion for formats/flavours?

A:

Q:
Consider how our brand shows up in different locations?

A:

Responding to Collaborations & Connections

Q:
How do we currently engage with trade?

A:

Q:
How can we create “Craft insiders”?

A:

Q:
What sort of partnerships/collaborations do we have & should we consider?

A:

Q:
How do we establish food pairings with our beer, how could we do home indulgence?

A:

Responding to Community & Care

Q:
What are we doing right now from an eco point of view

A:

Q:
How can we build on **our eco creds [near in/far out]**

A:

Q:
What does local mean to us?

A:

Q:
How do we leverage our Irish credentials?

A:

Responding to Understanding your consumer

Q:
What types of consumers are relevant to our business?

A:

Q:
What are the defining characteristics of our core audience?

A:

Q:
What changes can we make to reach them better?

A:

Q:
What about Loyalists/non rejectors/ “new” on trade consumers /new communities/?

A:

Responding to Other brand considerations

Q:
What makes us different to our competitors & how can we build on that?

A:

Q:
How can we “content create”?

A:

Q:
What are our values?

A:

Q:
Is our tone of voice, labelling & brand story engaging, how could we make it better?

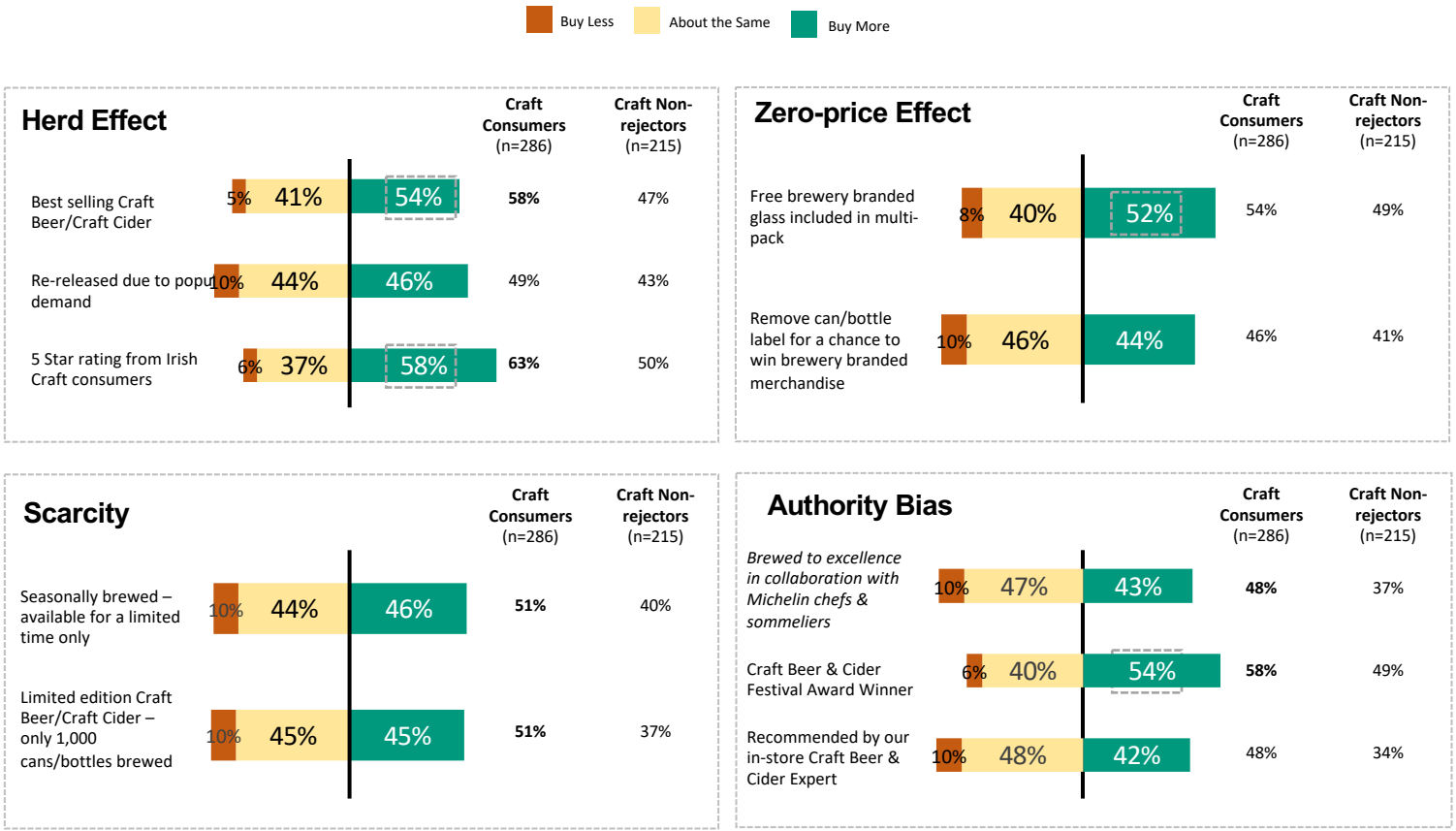
A:

5.0 Appendix



Photo by Jon Parry on Unsplash

We tested 10 different messages to determine the level of influence they might have on purchase intent.



Q15. Thinking about different messages you might see on a can, bottle or case of Craft Beer and/or Craft Cider please consider how much each message would influence, if at all, how likely you are to buy Craft Beer and/or Craft Cider.

ECO-FRIENDLY+

STATEMENT

We focus on delivering Craft Beer & Cider that minimises the impact our brand has on the environment from production through to packaging.

This includes: off setting of carbon emissions; percentage of sales to environmental organisations; 100% recycled packaging; preservation of local
biodiversity & the use of locally sourced ingredients.

PERCENTAGE THAT AGREE

APPEAL

1/4

85%

TRULY DIFFERENT

2/4

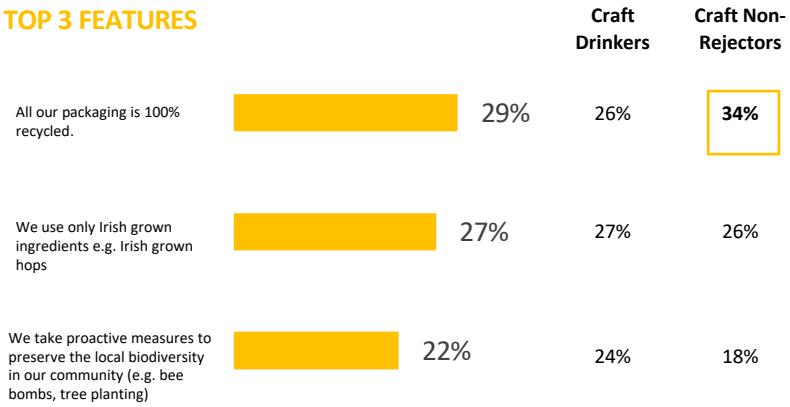
68%

LIKELIHOOD TO PURCHASE

1/4

70%

TOP 3 FEATURES



HEADLINE & KEY POINTS

Highest performer; sustainability is key for consumers.

1. Eco positioning & messaging is becoming more & more relevant & demand for products & services that deliver this will continue to grow.
2. Recycled packaging is the favorite feature here; reflective of wider growing demand for sustainability.

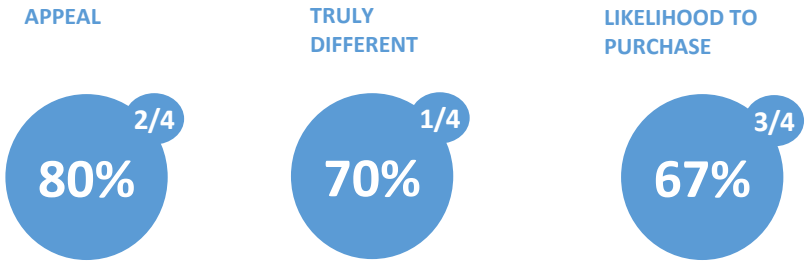
FOOD FRIENDLY

STATEMENT

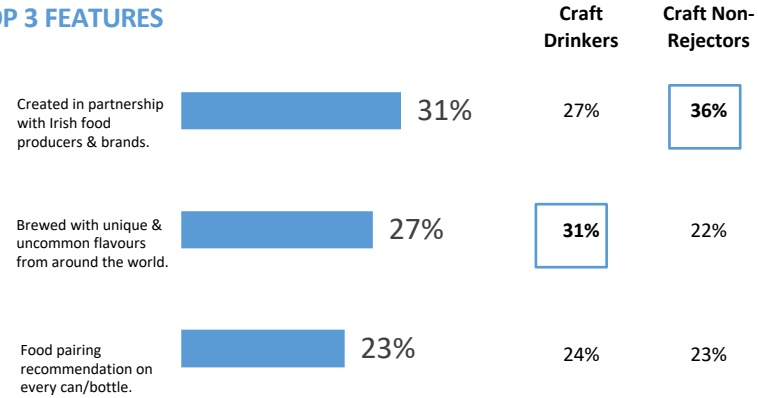
We take a culinary approach to flavour innovation to create Craft Beers & Craft Ciders that enhance the food experience.

This includes: food pairing recommendation on our can/ bottle; unique & uncommon flavours from around the world; partnerships with local food
producers, & working with Michelin chefs & sommeliers.

PERCENTAGE THAT AGREE



TOP 3 FEATURES



HEADLINE & KEY POINTS

Strong appeal, most distinctive across the four platforms.

1. Highest difference score reflects Food Friendly innovation brings welcome new news to consumers.
2. Strong performance reinforces consumer desire for enhanced in-home experiences.
3. Irish partnerships of particularly interest (favorite feature), reflecting desire to support local.

Q. 16A Food Friendly - How appealing is this Craft Beer/Craft Cider idea to you?
Q. 16B Food Friendly - This idea is truly different from other Craft Beers/Craft Ciders I've seen before.
Q. 16C Food Friendly - How likely do you think people like you would be to buy a Craft Beer/Craft Cider like this?
Q. 16D Food Friendly - Finally, thinking about the features which are part of this idea, which is your favourite?

COLLABORATIVE CRAFT

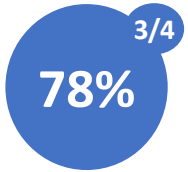
STATEMENT

Collaboration is part of our DNA. We partner with like minded people to create one of a kind Craft Beers & Craft Ciders for you to enjoy.

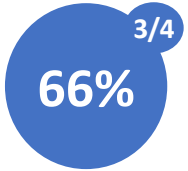
This includes: labels designed by local artists; personalised subscription boxes; Craft Beers /Craft ciders created with Irish & international brewers

PERCENTAGE THAT AGREE

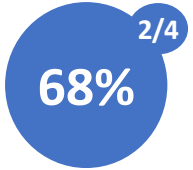
APPEAL



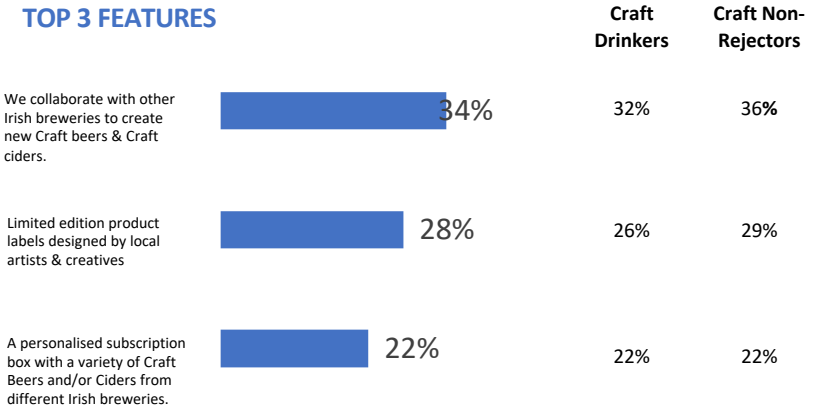
TRULY DIFFERENT



LIKELIHOOD TO PURCHASE



TOP 3 FEATURES



HEADLINE & KEY POINTS

Strong performance although not particularly distinct.

1. Collaboration in Craft might not feel particularly standout in terms of differentiation. However, we do see appeal for innovation in this area. Think about how to make a collaboration standout.
2. Again, Irish collaborations are the favorite feature here. Supporting local a key interest for consumers.

Q. 16A Collaboration - How appealing is this Craft Beer/Craft Cider idea to you?
Q. 16B Collaboration - This idea is truly different from other Craft Beers/Craft Ciders I've seen before.
Q. 16C Collaboration - How likely do you think people like you would be to buy a Craft Beer/Craft Cider like this?
Q. 16D Collaboration - Finally, thinking about the features which are part of this idea, which is your favourite?

TRANSPARENT QUALITY

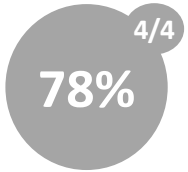
STATEMENT

We guarantee the quality of our Craft Beer & Craft Cider through a commitment to 100% transparency.

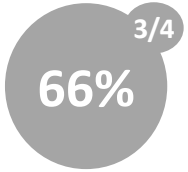
This includes: behind the scenes website video footage of our brewing process; traceable information about our ingredients & QR codes that reveal ratings & reviews.

PERCENTAGE THAT AGREE

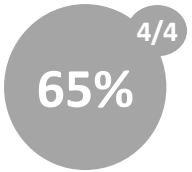
APPEAL



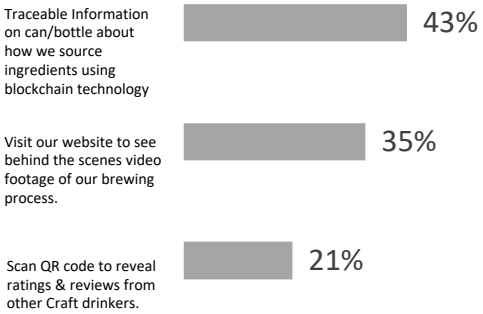
TRULY DIFFERENT



LIKELIHOOD TO PURCHASE



TOP 3 FEATURES



	Craft Drinkers	Craft Non-Rejectors
Traceable Information on can/bottle about how we source ingredients using blockchain technology	44%	41%
Visit our website to see behind the scenes video footage of our brewing process.	35%	36%
Scan QR code to reveal ratings & reviews from other Craft drinkers.	21%	23%

HEADLINE & KEY POINTS

Highest ranked feature overall: traceable info key for consumers.

1. Transparency potentially creates less energy than some of the other platforms, resulting in the slightly lower appeal score.
2. However, the highest ranked feature – traceable information on ingredients – reflects consumer demand for greater knowledge around the origins of their food & drink.

Q. 16A Quality/Transparency - How appealing is this Craft Beer/Craft Cider idea to you?
Q. 16B Quality/Transparency - This idea is truly different from other Craft Beers/Craft Ciders I've seen before.
Q. 16C Quality/Transparency - How likely do you think people like you would be to buy a Craft Beer/Craft Cider like this?
Q. 16D Quality/Transparency - Finally, thinking about the features which are part of this idea, which is your favourite?

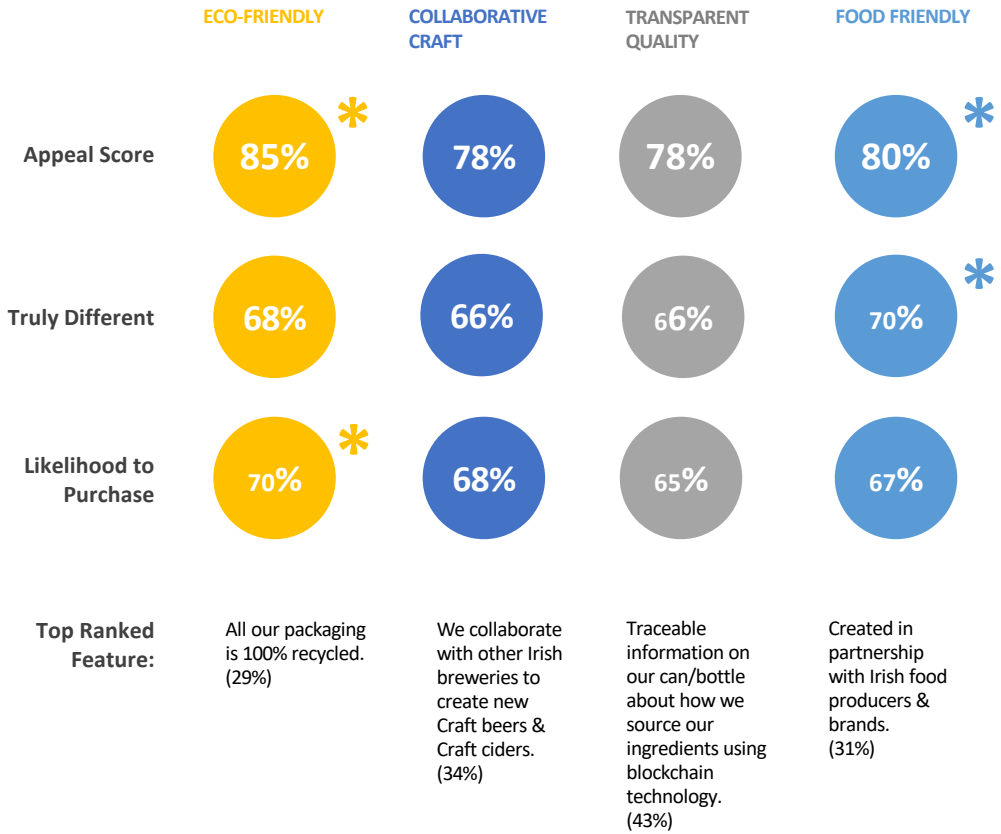
Innovation Opportunities

Four robust, accessible areas of innovation emerge from this research offering growth opportunity with receptive consumers.

We see particular opportunity in two:

Eco-friendly+ shows strongest appeal & purchase likelihood. We see across jump! projects that people are looking for easy ways to make a difference.

Food Friendly Beers/Ciders & Irish food collaborations shows high appeal. This fits with people's desire for great in-home experiences, Craft as a treat & the power of local connections



Barriers
Craft Beer

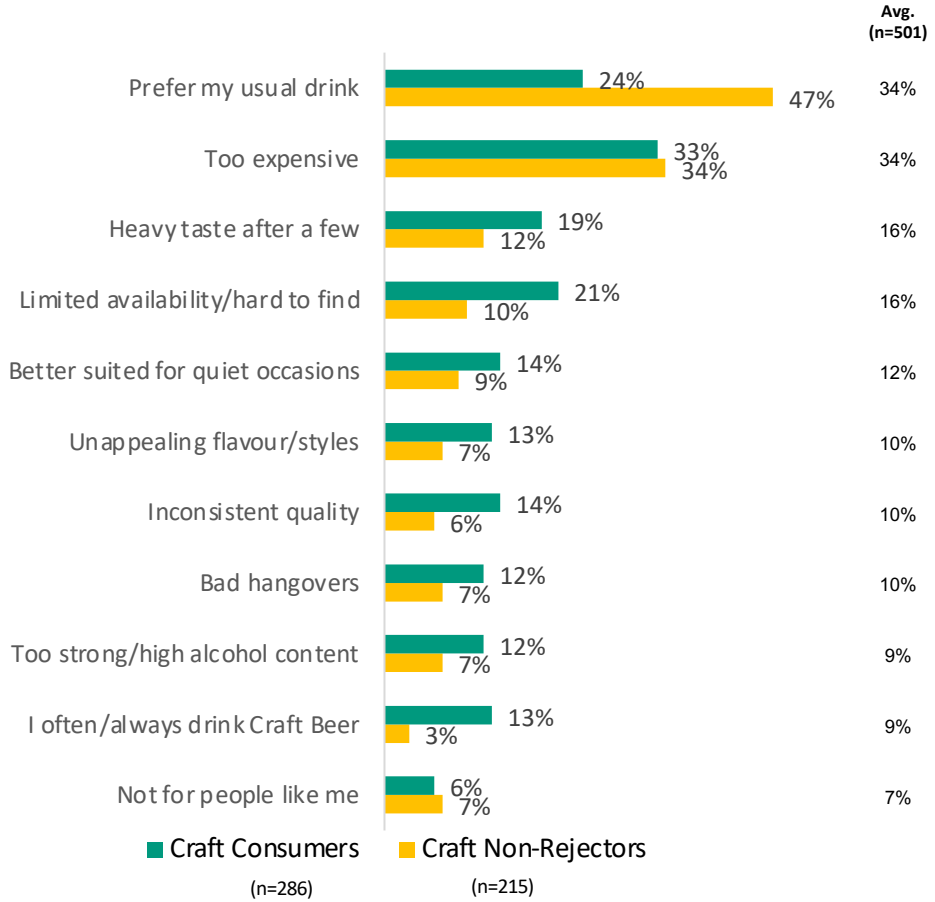
For Craft Beer Non-rejectors: The top barriers suggest Craft brands aren't yet creating enough disruption to pull people out of current habits.

Combined with an expensive price perception, it makes it all too easy to stay with the usual options.

There was an initial fear that Craft might be perceived as elitist or inaccessible, but 'Not for people like me' ranks as the lowest barrier.

For Craft Beer Consumers: Limited availability is a barrier, suggesting greater presence would increase purchase. While Craft has become more accessible, it is still not as widely available as it could be, especially for those looking for it.

'Heavy' also at play here; reinforcing Craft more suitable for quieter occasions.

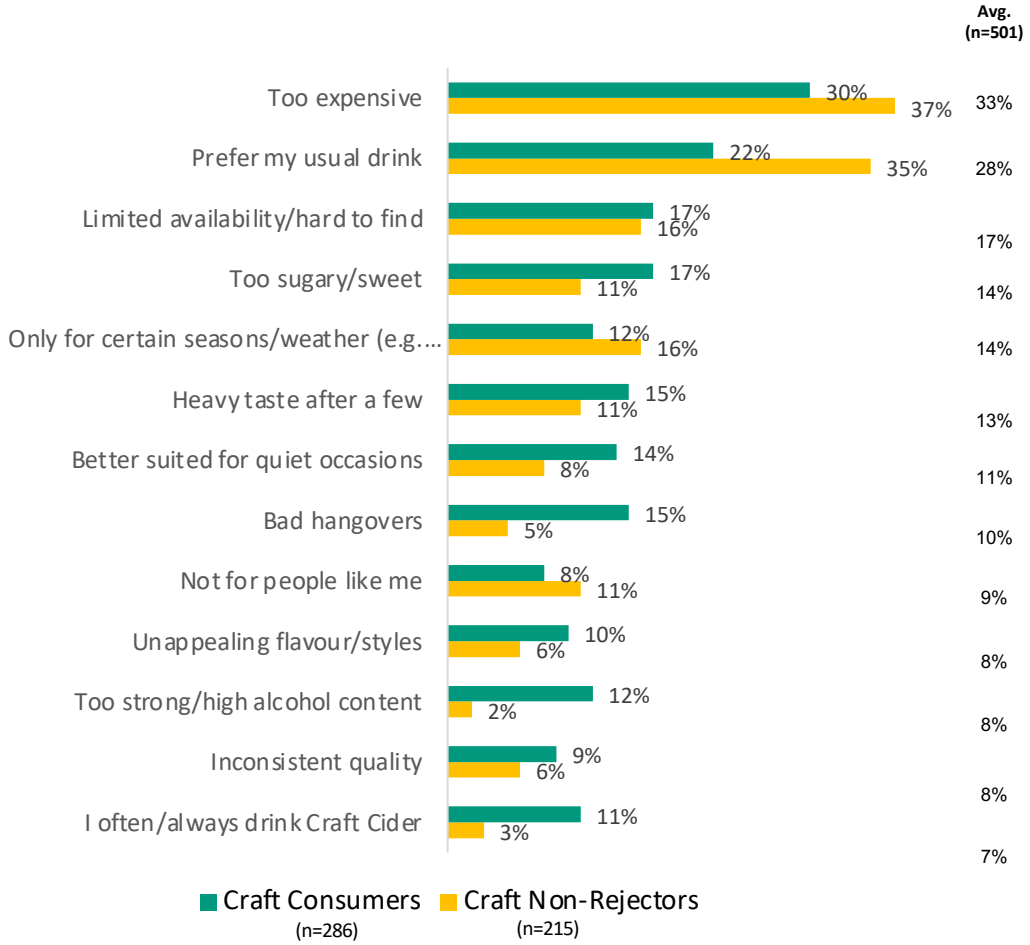


Q14A. Why don't you drink Craft Beer more often (if you do drink it) or at all (if you don't currently drink it)?

Barriers
Craft Cider

Price is top barrier for Craft Cider, overall there is a similar ranking of barriers to Craft Beer.

There's a stronger perception among Craft Non-rejectors that it's more suited to certain weather, consistent with our 'table' discussion in research; however this is among less than 1 in 5.

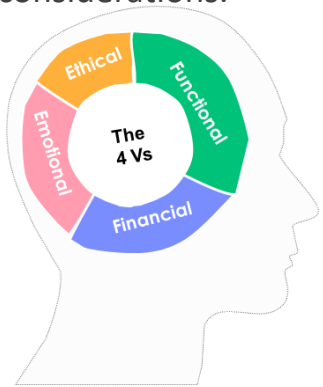


Q14B. Why don't you drink Craft Cider more often (if you do drink it) or at all (if you don't currently drink it)?

Decision Making

Traders typically have four big questions in mind, across four key areas.

Within these areas, there are a number of primary & secondary considerations.



	Financial	Functional	Emotional	Ethical
	Will it sell?	Can I see quality & point of difference?	Can I / my staff get behind it?	Will it contribute to advancing Irish & local?
PRIMARY	**It has to be commercial**	**Bringing something new to tap / shelf**	**Energised by engagement with producer**	**Supports local or Irish breweries**
	What margin can be made	**Brewery capacity to deliver**	Has a story to tell-- Provenance, people, process	***Ethical supply chain***
	Minimum order quantity	Solid core lines plus experiments	Samples / tasting provided	Attractive to international customers / tourists
	Upselling / multiplier opportunity	Space for new niche	Alignment on values / image	Drive towards hyperlocal
	Impact of MUP policy	Sessionability > Higher ABV	Strong brand & design	Provenance. People & Process

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jump!