

The background of the slide is a photograph of a diverse group of people sitting around a wooden table in what appears to be a restaurant or bar. They are all smiling and engaged in conversation. Several glasses of beer and wine are on the table. The image is overlaid with a semi-transparent white filter to make the text legible.

Global Conversation: Beverage Consumer Trends

World Brewing Congress
August 16, 2016

Who is Mintel?

The insights behind your next big idea



Consumers

We ask 30,000 people for their opinions each month.



Markets

We track consumer spending in 3,000 markets across 34 countries.



Innovation

We cover 33,000 new product launches from 62 countries each month.



Trends

We track more than 70 consumer lifestyle trends and thousands of observations on a daily basis.



Menu Insights

We watch 8,000 restaurant menus across the US.

Agenda

- **Consumer behaviors regarding alcohol**
- **Omnipresent health and wellness priorities could change the alcohol category**
- **Story-telling is changing consumers' preferences**
- **Nostalgia is influencing flavors**
- **Q&A**

Variety and curiosity is a global phenomenon

64%

of **Polish** adults who have purchased beer in the last six months **prefer to try many different beer brands rather than sticking to one type.**

56%

of **Brazilian** adults aged 18+ who have drunk spirits in the last six months agree **it is worth trying typical spirits from other countries.**

27%

of **UK** adults aged 18+ who drink beer would **try a new beer because it is made with a flavor or ingredient that they have not tried before.**

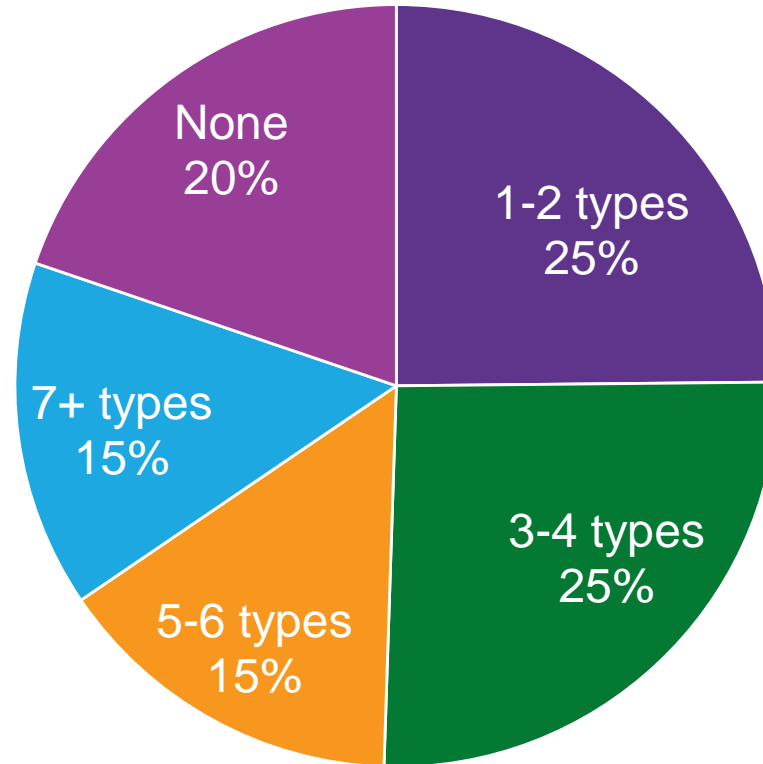
9%

of **Canadian** internet users aged 20+ who drink wine do so to **learn more about wine.**

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Consumers are active in a variety of alcohol categories

Repertoire of usage of different types of alcoholic drinks, UK, May 2015



■ 1-2 types ■ 3-4 types ■ 5-6 types ■ 7+ types ■ None

In the US, adults associate certain drinks with specific traits

Beer

Many US adults associate beer with being **easy to drink**.

Hard cider

Many US adults associate alcoholic or hard cider as **fun**.

Cocktails

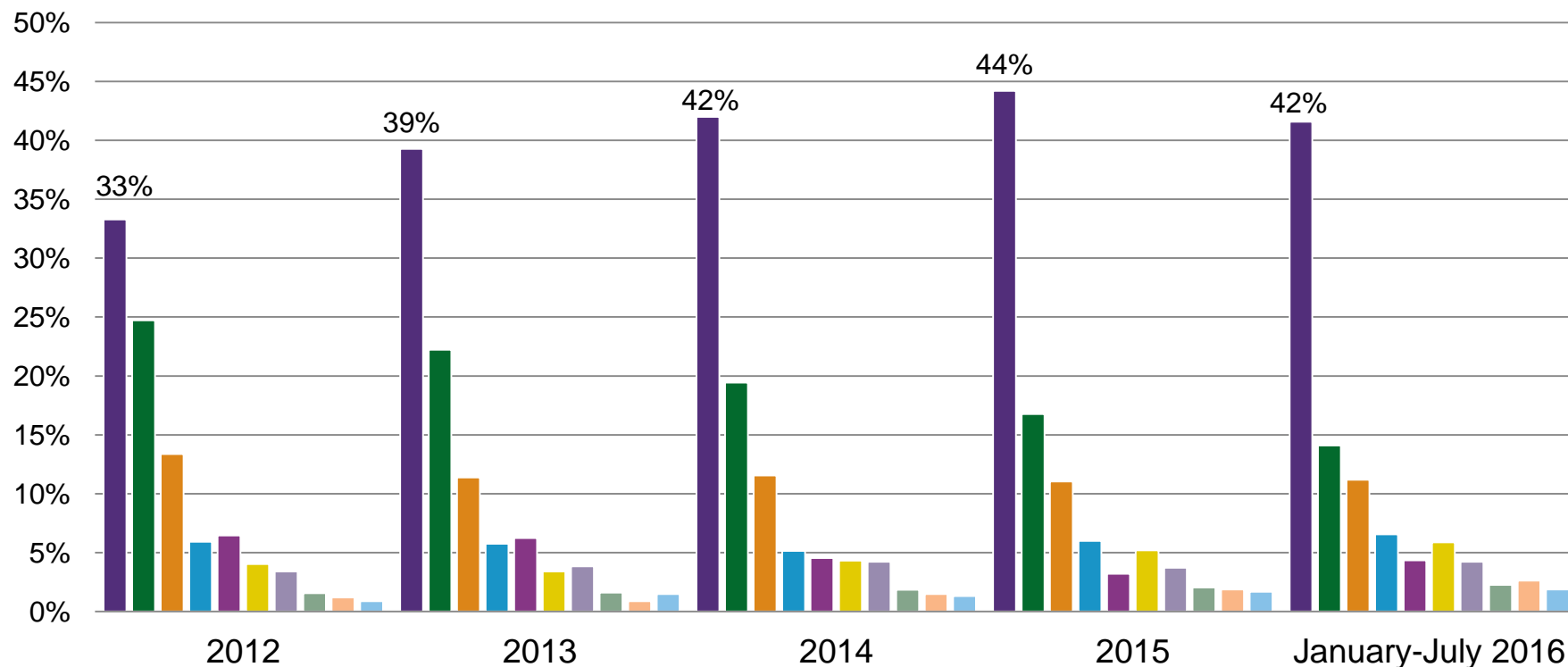
Cocktails and mixed drinks are most closely associated as **something for unwinding, for drinking with others and for drinking alone**.

Wine

Still, sparkling wine and Champagne is associated with **pairing well with food and being high quality** by US adults.

Beer enjoys a majority share of global launches

Global alcoholic beverage launches, by leading subcategory's share of annual launches, January 2012-July 2016



■ Beer

■ Flavoured Alcoholic Beverages

■ Vodka

■ Cider

■ Gin

■ Wine

■ Liqueur

■ Whisky

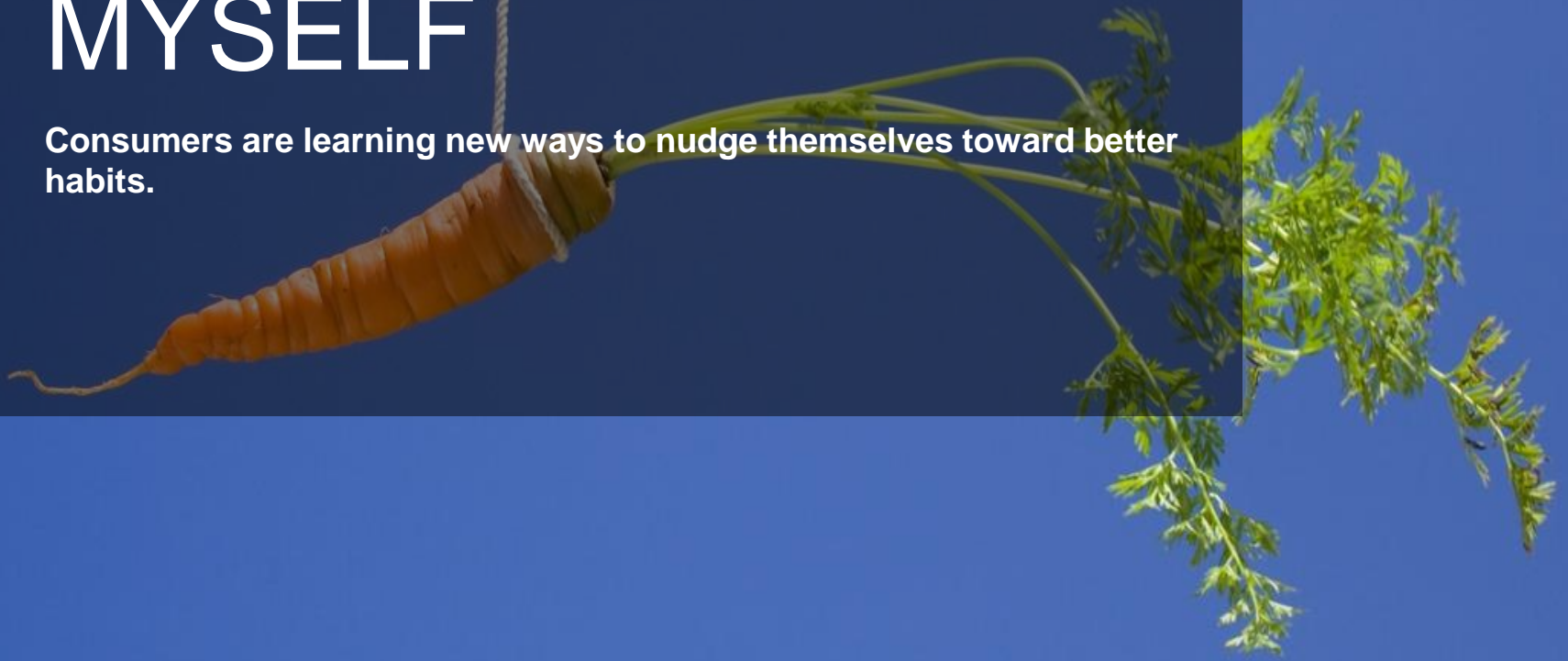
■ Fortified & Other Wines

■ Brandy



HELP ME HELP MYSELF

Consumers are learning new ways to nudge themselves toward better habits.



Pay by “kilo” takes new shape

The Moving Food Truck, Portugal

People can pay for food truck’s menu in kilometers by running or walking alongside the truck for the items distance cost



Kalenji pop-up, France

Sportswear brand Kalenji created a pop-up restaurant where customers could #EatYourRun and pay for food by the distance of their run



Health priorities are affecting consumers' approach to alcohol

73%

of **Spanish** adults aged 18+ who have bought wine in the past six months agree that **wine is healthier than other alcohol drink types**.

42%

of **Chinese** internet users aged 20-49 in tier 1-3 cities who have drunk alcoholic beverages out of home in the past six months say **alcohol that is good for health, such as lower calorie, is very important to their purchase**.

24%

of **UK** adults aged 18+ who drank alcoholic drinks in the last three months often **consider the calorie content when choosing what to drink**.

21%

of **Brazilian** adults aged 18+ who have drunk beer in the last six months **would pay more for beer with lower alcohol content**.

A CERVEJA
OFICIAL
DOS ATLETAS
NÃO OFICIAIS

OBSERVATION

3,8*
CARBOIDRATOS
88*
CALORIAS

A Beer For Athletes

07 December 2015 - Brazil

Skol's new Ultra beer is catered toward consumers who are striving to balance an active lifestyle with the pleasure of drinking beer. The light malt beer has 88 calories and 3.8% ABV.

Protein beers seek a more positive better-for-you solution

Mighty Squirrel's 5g-protein beer



The brew, which contains 5g of protein per serving compared to 1g for conventional beers, was initially only sold in Boston, but has now been given a national launch following strong sales

Barbell Brew's 22g protein beer



The product contains 21.8g of protein - which is about the same as a sirloin steak, and is 3.6% ABV.

Free from alcohol launches are growing



Stoli Gluten-Free Premium Vodka, US

Blend of corn and buckwheat and priced the same as the remainder of its vodkas

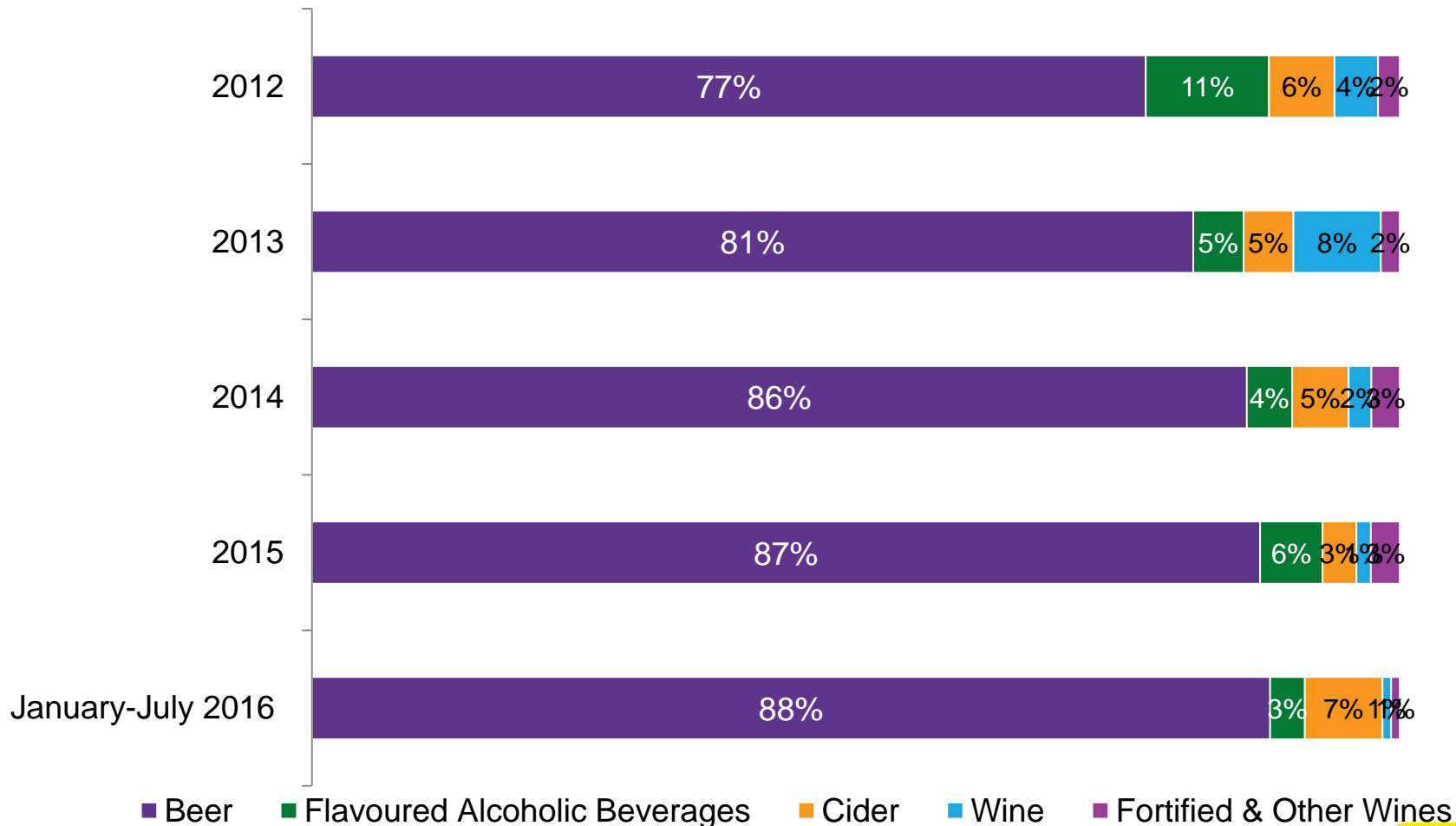


Bailey's Almande Almondmilk Liqueur, Europe and North America

Dairy and lactose-free almond milk-based variety of its Irish cream liqueur

“Free-from” can be mean more than just trendy ingredients

Global alcoholic drink launches with 0-2% ABV, January 2012-July 2016



Consumers are already finding alternatives

63%

of **German and Italian adults** aged 18+ who have drunk tea, hot chocolate or malted drinks agree that **tea is a good alternative to having alcohol on a night in.**

36%

of **Polish adults** who have drunk carbonated soft drinks in the last month agree that **malt-based carbonated soft drinks are good alternatives to alcoholic drinks.**

18%

of **US adults** aged 22+ who consumed alcoholic beverages in the last three months **are interested in mixers that allow for blending with non-alcoholic beverages or consumed on their own without alcohol.**

7%

of **US adults** aged 22+ who drink carbonated soft drinks and/or sparkling beverages **have drunk a sparkling drink in place of an alcoholic beverage.**

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Sparkling drinks take inspiration from alcohol



PriSecco, Germany

A line of organic non-alcoholic sparkling drinks that emulate the wine category and are available in: Nr. 25 Organic Cuvée with Pear, Sloe and Douglas Fir Flavours and Nr. 28 Organic Cuvée with Apple, Emmer and Herbs varieties



StarDrink Cola + Barrel Flavor, Germany

Private label cola is described as a refreshing drink containing caffeine and reflects the rise of whiskey and barrel-aged craft beers



Non-alcoholic Spirit

10 November 2015 - UK


UK product Seedlip is the world's first non-alcoholic distilled spirit. The recipe is inspired by a 1651 compilation of non-alcoholic remedies and made with a range of ingredients, including American oak and Guatemalan green cardamom.

“

30%

of consumers have the perception that low or non-alcoholic drinks are bland or disappointing

”

A close-up photograph of a hand operating a beer tap. The tap is part of a stainless steel manifold with several other taps visible in the background. The hand is holding a glass that is being filled with beer, which has a thick head of white foam. The lighting is warm and focused on the tap and glass.

If health presents a challenge, where are the opportunities?

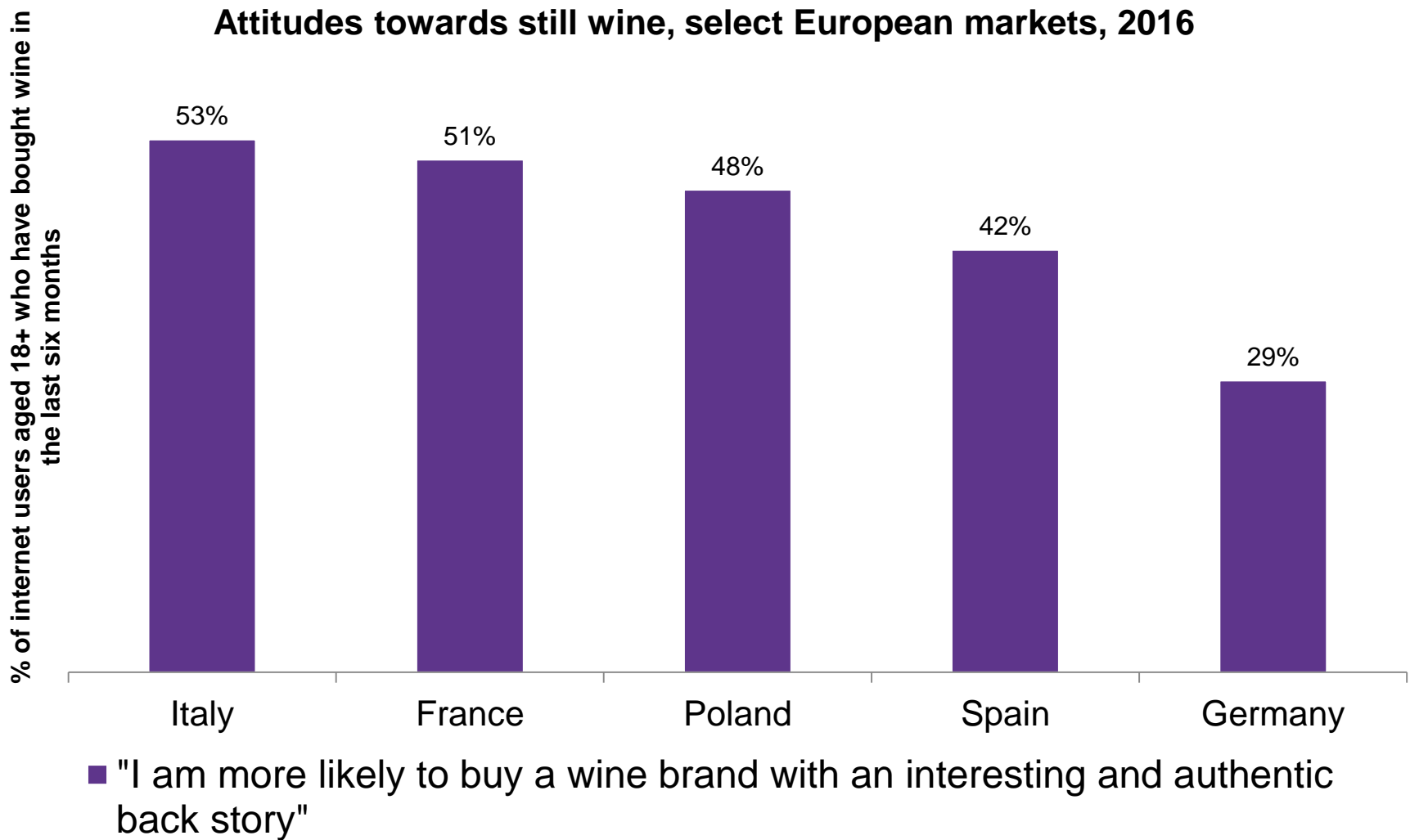
- Story-telling
- Nostalgia



Based on a True Story

Consumers have been romanced by the stories products are telling about their origin, ingredients or inspiration, but confusion arises when similar claims are being made by legitimately hand-crafted products as well as mass-produced food and drink, according to one of Mintel's 2016 Global Food & Drink Trends.

Story motivates wine some wine purchases



215 BEERS

Brew Your Own BrewDog

11 March 2016 - UK

UK beer brewery BrewDog has released recipes for fans of the brand to brew their own ales at home. The publication of recipes and equipment guides reflects that the brewery's founders started their careers as home brewers.



Fresh Coffee Paper

11 April 2016 - Brazil

To prove the freshness of its produce to consumers, Brazilian coffee brand Pelé has begun wrapping up its coffee packages in today's newspaper. To prove that the outer wrapping was, in fact, that day's newspaper, genuine copies of the publication were placed next to the coffee.



Mezcaloteca

20 October 2015 - Mexico

Invite-only and staffed by experts, Mezcaloteca is a bar in Mexico where guests can sample three purely artisanal mezcals and learn about how the agave drink is made. The bar's goal is to help consumers recognize traditional and industrial mezcals in order to preserve the heritage of the spirit.



Nescafé 360°

22 December 2015 - Brazil

Nescafé is letting people experience the coffee harvest in Brazilian farms through virtual reality via an app and use of Google Cardboard viewer. The behind-the-scenes footage helps to prove the provenance of its ingredients, sustainable business practices and contribution to the livelihoods and working conditions of coffee farmers.

IT'S TIME TO PRESERVE WHAT WE LOVE

Our street food is integral to our Singaporean identity and culture.

Likewise, Tiger is a beer brewed to reflect and represent our unique Singaporean tastes, flavours and way of life.

As the beer of Singapore and street food's fellow companion in the Singapore hawker scene for more than 80 years, Tiger is championing this movement to support Singapore's beloved but disappearing street food culture, and give it the iconic recognition it deserves.

Watch the films >

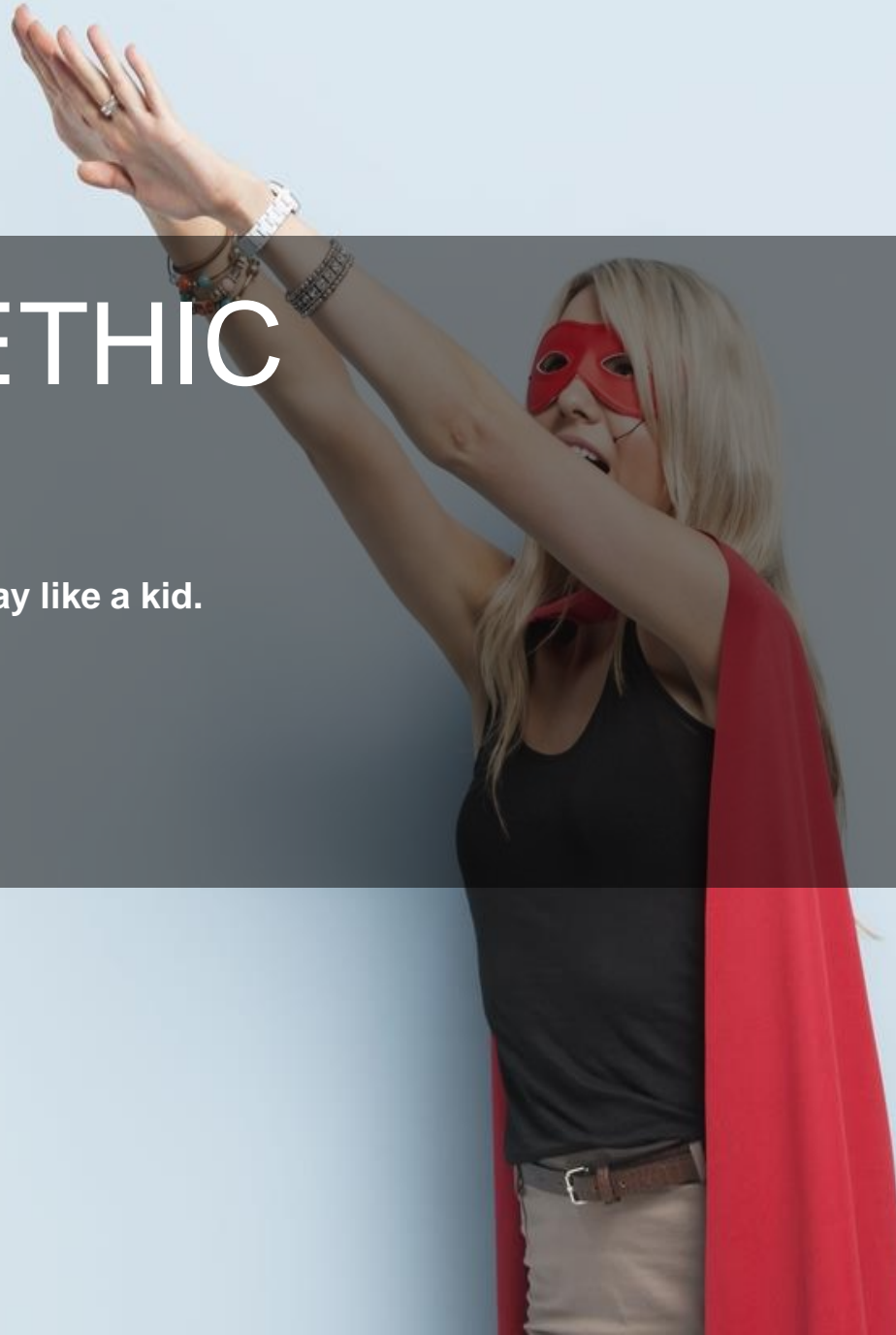
Hawker Heritage

26 April 2016 - Singapore

Beer brand Tiger has launched a new series of campaigns which aim to preserve Singapore's street food culture. The videos show the hard work that goes on behind the scenes in the food stalls and the aging generation who are sustaining this facet of Singapore's identity.

PLAY ETHIC

Work like an adult, play like a kid.



Stress is a key concern around the world

56%

of **US** women rank stress as a health issue that concerns them, compared with 46% of **US** men.

30%

of **UK** internet users aged 18+ who are employed **drank alcohol to tackle work stress** in the last 12 months.

22%

of **Brazilian** adults aged 16+ would be **interested in products that help them relax** more in their free time.

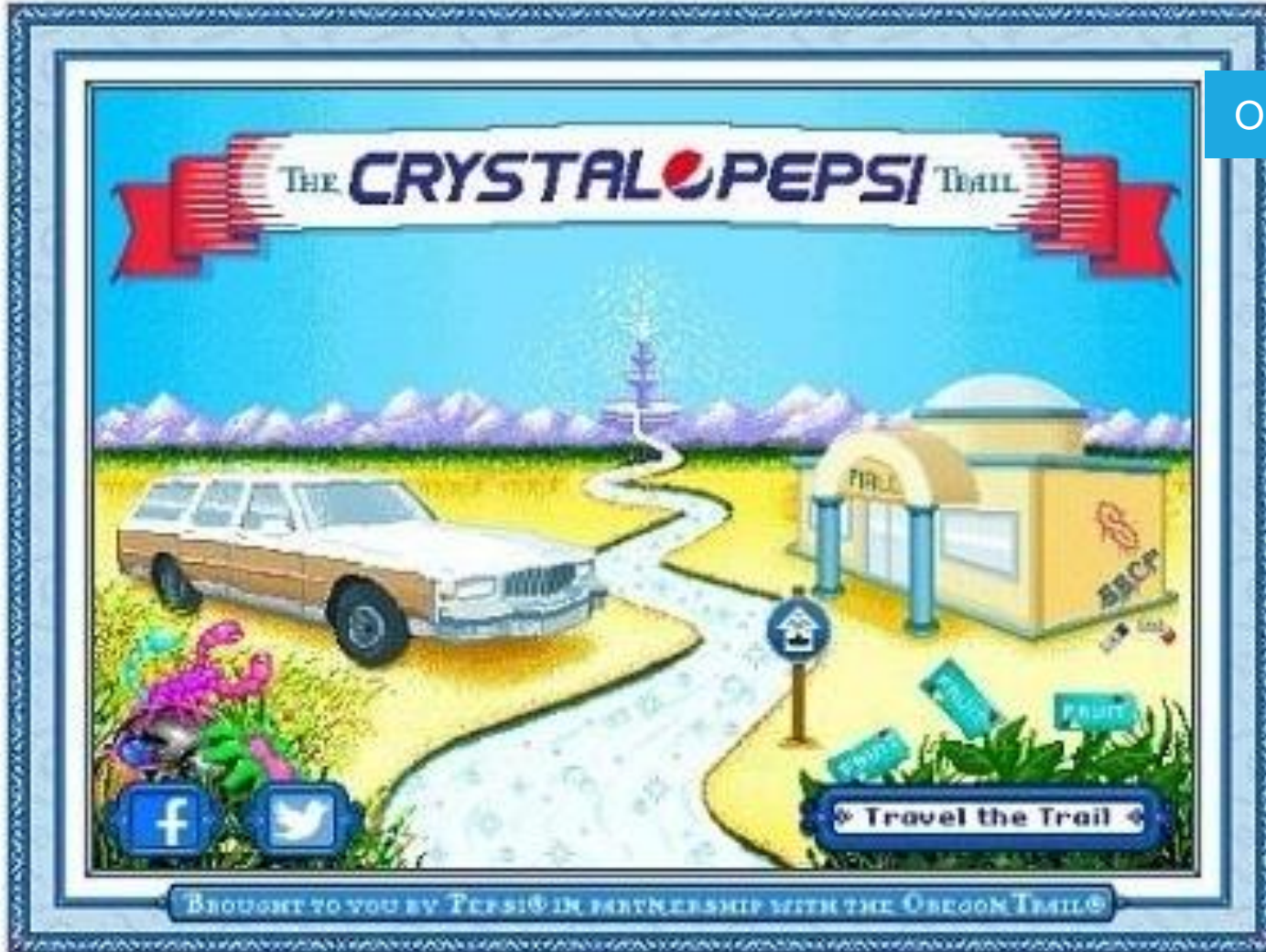
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Wonderful Duff

23 September 2015 - Chile

Chilean consumers will soon be able to enjoy a glass of Homer Simpson's own Duff Beer as 21st Century Fox teams up with local brewers to craft a marketable version of the fictional beverage.



Crystal Summer Comeback

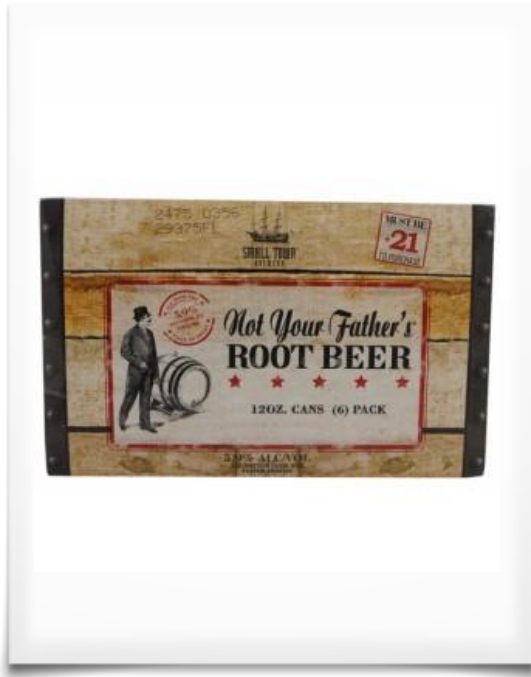
13 July 2016 - Canada, US

US-based Pepsi has launched its retro 1990s cola, Crystal Pepsi, which will be available across the US and Canada this summer. The brand complemented the nostalgic relaunch with a 1990s-inspired online game, The Crystal Pepsi Trail.

Hard soda gains fans easily in the US

44%

of US adults aged 22+ are interested in trying products with alcoholic soda flavors (eg cola, root beer, ginger ale).



Not Your Father's Root Beer, US



Henry's Hard Soda Orange, US



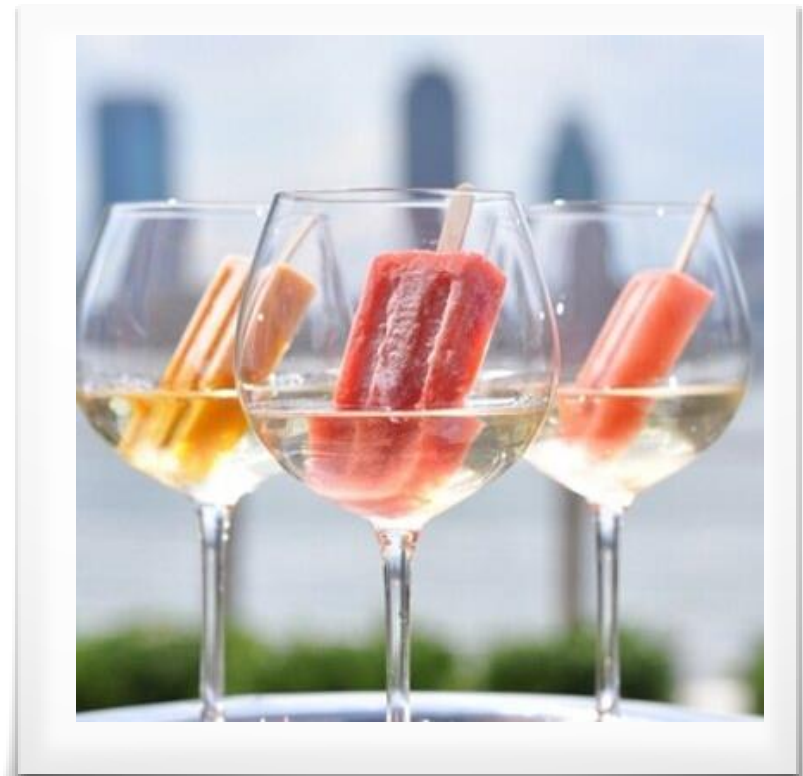
Best Damn Hard Cherry Cola, US

Combining two indulgences into one: Alcohol and frozen desserts



Mixxtail ice cream, Argentina

Alcoholic drink brand offered packaged ice cream via a Drink Truck that traveled the coast during summer



Loopy Doopy bar in New York City offers a range of prosecco and ice pop cocktails

Sonic restaurants created Square Shakes inspired by Instagram

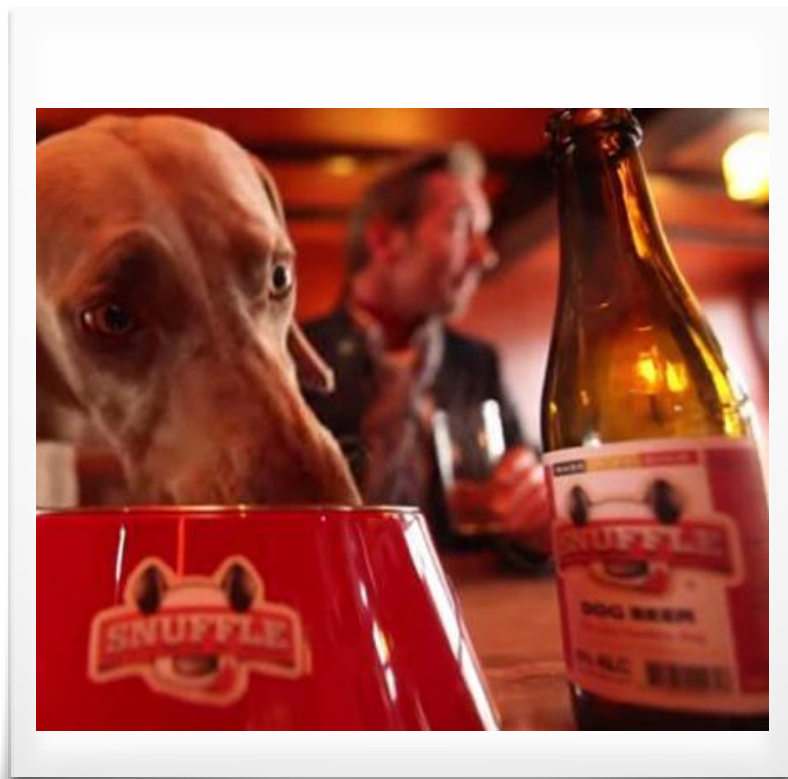
sonicdrivein

Dark Chocolate #SquareShakes

SONIC

THE WORLD'S
FIRST SHAKES
DESIGNED FOR
INSTAGRAM

'Beer' and 'wine' extend alcohol occasions to our furry friends



Snuffle, UK

London pet boutique Pet Pavilion is offering a beer for dogs called Snuffle. The drink is non-carbonated and non-alcoholic and has been developed to deliver essential nutrients to dogs and to keep them hydrated.



Pinot Meow and MosCATo, US

Denver-based company Apollo Peak released two non-alcoholic drinks made from beets and organic catnip. The tagline for the products is: "Why Drink Alone?"

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Key Takeaways:

Health

Alcohol could be one of the first categories that consumers cut back on when they're trying to improve their lifestyle.

Story

People are used to hearing stories, especially from alcohol brands, which drives a need to pursue new angles and partnerships.

Fun

Consumers of all ages are interested in nostalgia and frivolity to help escape stressful daily lives.

A close-up photograph of a hand pulling a beer tap handle to pour beer into a glass. The background shows a row of other taps. The image is dark with a yellow overlay in the top right corner.

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Questions?

Thank you!

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