What consumers today expect from a beer tomorrow

DRINKING TRENDS | At every new start, people are tempted to follow positive trends with good intentions or to steer unfavourable forecasts into the positive. The now fifth Corona wave with its restrictions almost automatically makes us think of the film "And every day the groundhog says hello". Even with Corona, everyday life goes on and beverage manufacturers have to deal with emerging drinking trends. In addition to regionality, there are numerous other behavioural changes, expectations and desires on the part of consumers that are just waiting to be served by tailor-made concepts.

THE DEvElopMEnT for Beer in Central Europe is not at all cheerful, as it prophesies nothing other than crowding out and market shakeout, with per capita consumption continuing to fall. And the year 2021 is more reminiscent of 2020 due to the pandemic-related restrictions on gastronomy than that spontaneous jubilant arias can be sung for "New Fu- ture". In short: Beer consumption is falling steadily, especially Pils and Weizen are still in demand.

in decline - pale ales, beer mixes and beers with "without alcohol" are among the winners of recent years.

At first glance, the findings of the Food Trend Report 2022 by food expert Hanni Rützler do not exactly make the brewing industry clap its hands: According to the report, in addition to regionality, sustainability remains an important criterion for consumers, but not necessarily a decisive purchase criterion. As we have also learned from our own market research studies she also assumes a further massive decline in brand and retail loyalty. In addition to the consumer typologies of vegetarians, vegans and flexitarians, according to Rützler, there are now more and more "omnivores" who consciously eat a wide variety of everything (including unusual foods) and try it out or look for products with additional functional benefits (e.g. protein for muscle building). Due to the limited holiday and leisure activities in the last two years, consumers are satisfying their longing for exoticism via newly discovered cuisine and consumption occasions. In addition, the increase in e-food is not only being used for e-commerce is growing as a sales channel, but according to Rützler, the overall connectivity of brands and people via consumption, information, entertainment and contexts is likely to increase rapidly.

Light beer on the way to stagnation?

On the heels of Pilsner, which has been shining for years, the Helle was able to establish itself as the new standard alternative among beers.

Fig. 1 A lot of light, a lot of white and blue, too much uniformity and boredom?

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place. Already established in southern Germany, the variety has been able to score points and gain popularity through its universality in the product: the mildly palatable taste from the consumer's point of view and the high drinkability, which makes Hel- les convenient for a variety of occasions and easily accessible to a wide range of consumer types. With light beers, consumers are "on the safe side": There is no need for a specific pouring ritual and a drinking vessel that conforms to the variety (as is the case with wheat), it is uncomplicated to drink for both men and women, it has

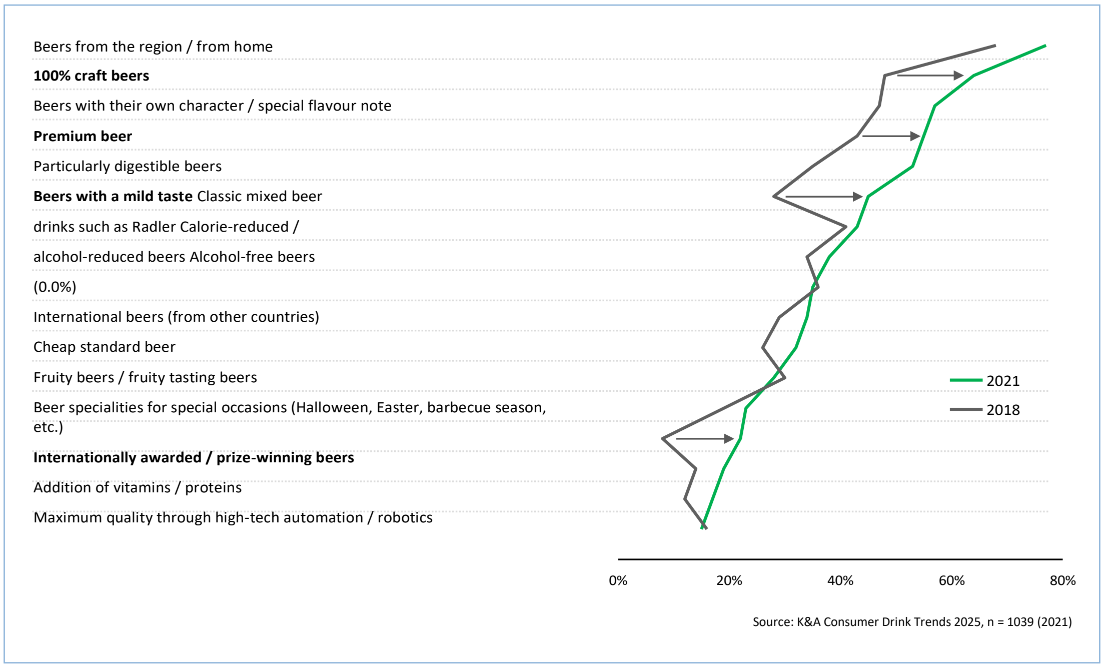

Fig. 2 Requirements for beer from the consumer's point of view

The result is a beer with no hint of Pils-typical bitterness, and the consumer does not have to embark on strange, new and unusual taste journeys of craft beers in need of explanation (from cucumber cans to strawberry wheat).

Helles tastes like uncomplicated beer should taste. And the whole thing is garnished with the supposed speciality character of a regional (Bavarian) speciality, which makes such beers enjoyable in the actual or imagined setting of Bavarian-South German beer cosiness. This was reinforced by the packaging design, which visually strain the consumers' mental cinema before the actual enjoyment of the beer. What may have started with the Mooser Liesl became a trend and in the end a uniform mash (Fig. 1). Like every trend, the light beer trend will also come to an end. Whether it will end in 2022 or a little later cannot be predicted ad hoc, as too many different contextual factors can have an impact. If large breweries outside Bavaria, whose sales are flagging, are now preparing to enter the already well-filled light beer market with another white-blue Hellbier, then the gradual decline in sales seems likely. The end of the boom no longer seems too far away.

Nevertheless, Jeff Maisel is counting on a further continuation of the light beer trend and is expanding its capacities by 500,000 hl per year for this purpose (Interview Getränke News, 30.06.2021). He is basing this on the assessment of various experts who forecast a further continuation. His Bayreuther Hell, successfully launched in 2011, is a typical representative of Bavarian light beers - euro bottle, discreet blue-and-white label and regional reference to Bavaria via the Bayreuth origin. Just like Tegernseer, Chiem-

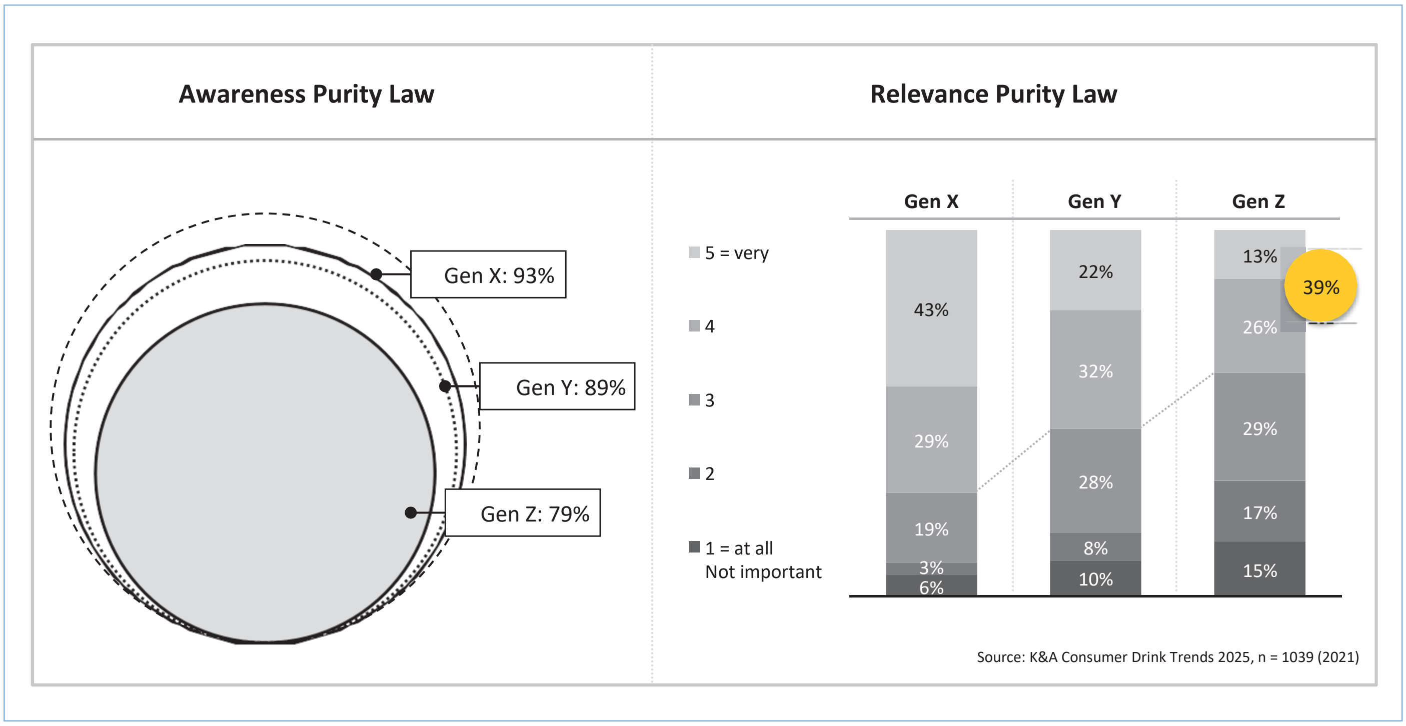

Fig. 3 Awareness and relevance of the German Purity Law for beer

seer, Oberdorfer, Hopfenseer and others (Fig. 1).

On the one hand, the product advantages of pale beers allow for connecting points for other varieties (naturally cloudy pale, country beers, Zwickl, straightforward lager and export beers), but also a complete reinterpretation of pale beers by marketing and a departure from the close ties to Bavaria. One example is Brauerei Fürstenberg's na- turtrübe Hell, launched in 2018. Originally focused on Pilsner in the longneck bottle, the brewery ventured into new territory with

The new product, the Steini bottle, and a completely revamped image mark the company's entry into the world of light beer.

- and won. According to brand manager Regina Gerschermann, sales were almost 100 per cent above expectations. Pülleken, which was introduced in May 2020, made an even clearer break with the typical Bavarian-blue, 'ideal world' appearance: With its yellow-green appearance and fairytale characters on the label, it no longer had anything in common with Bavaria - but it still had the uncomplicated and inviting variety DNA of Hellem

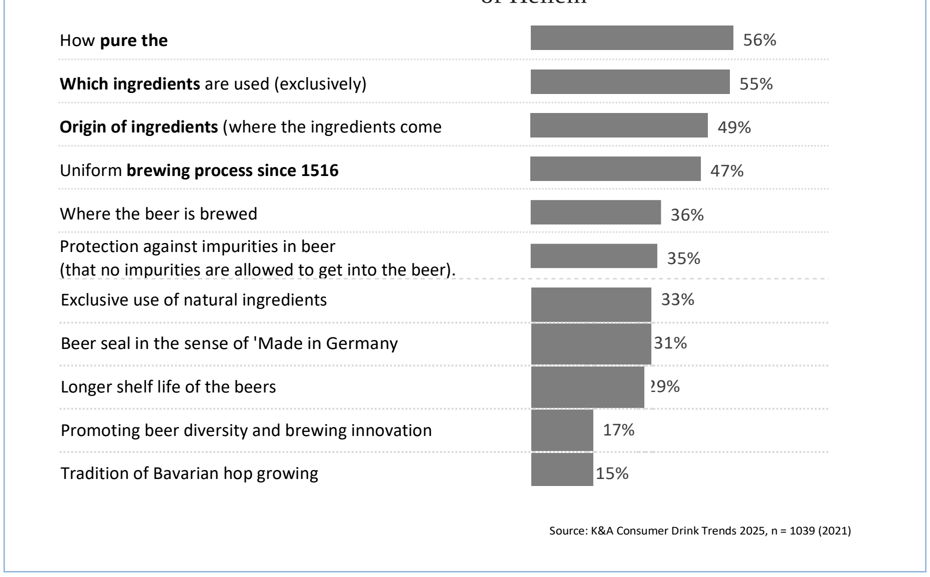

Fig. 4 Most relevant contents of a beer purity bid for consumers

a beer for everyone and for every occasion, to be able to toast with a Pülleken.

lConsumer Drink Trends 2025

The big question remains open and cannot be adequately predicted: What will follow the light beer trend?

Concluding from previous figures alone how which varieties will develop can only be done using scenarios. And even from the behavioural science perspective of context marketing, it seems dubious when consumers draw conclusions about their future attitudes and behaviour from their current everyday behaviour.

Nevertheless, it is possible to identify indications of what is already important to consumers when it comes to beer today and where they expect or can imagine additional demand for the future. For this purpose, K&A BrandResearch initiated a consumer survey on its own initiative and interviewed n = 1093 beverage lovers throughout Germany in September 2021, representative of Generation X, Y and Z. The survey was carried out by K&A BrandResearch. Since a similar study was already conducted in 2018, it was also possible to analyse changes in attitudes.

Under the particular impression of the Corona pandemic and the imposed lockdowns, the perception of respondents across all age groups was that
the consumption of "at-home" beverages such as

coffee, mineral water, tea, but also liqueurs, beer mixes and beers without alcohol have increased compared to the past (before Corona), while "sharing drinks" have slipped into the negative perceptually (spirits, cola drinks and beers). In the case of beer in particular, almost all types have lost in consumption frequency in the perception of all beer-drinking consumers. Light beer, however, continued to gain in importance.

Beer continues to be popular with consumers

"The" central alcoholic beverage for social gatherings, albeit with decreasing importance in generational terms. If we ask consumers what they consider to be the most important requirements for "good" beers, then regionality, craftsmanship, strength of character (in terms of taste and appearance!), drinkability and premiumisation (intrinsic value, award) achieved top values (Fig. 2). However, since 2018, individual characteristics have shifted significantly more positively.

The biggest boost was given to "beers with a mild flavour", which suggests that the drinkability of the beers needs further attention as well as a less hop-emphasised taste orientation. Premiumisation" also received an additional boost, which is related to the fact that consumers - thanks to Amazon & Co. - are paying more and more attention to awards, recommendations, likes, set- tings (suitable food partners, as in the case of wine) and also decide after the votes. Artisanal production is also very important, which can also be explained by the fact that

"Craftsmen" are becoming rarer in everyday life and therefore also more in demand in public.

An analysis of the generations is exciting: while for Gen X (born between 1965 and 1979) regionality and craftsmanship are unchallenged above all else (83 and 71% respectively), in Gen Z (born 1995 and later) their importance is dwindling. Much more interesting for the upcoming beer-drinking generation are low-calorie and low-alcohol beers. Due to their still young careers in working life, the price also plays a significantly greater role. In addition, there is a greater openness towards fruit and herbal beers - not least a consequence of the rediscovery of (herbal) teas among young people. And last but not least: Young beer consumers

are already much more open to high-tech automation and robotisation of brewing processes (23%).

German beer without purity law?

Untouchable for most German brewers: the Purity Law of 1516. Consumers also know it or have at least heard of it: In Generation X of beer drinkers, 93 percent have heard of it, and in the young Gen Z, 79 percent. Although the majority of respondents can also attribute the Reinheitsgebot to a restriction of ingredients and the year 1516, the values for the significance in the generational assessment are devastating: while 72 per cent of beer consumers in Gen X consider the Reinheitsgebot relevant for their purchase decision, in Gen Z it is only a minority of 39 per cent (Fig. 3).

Irrespective of the relevance and age of the consumers, a "purity requirement 2.0" could well gain in relevance if it is limited to ingredients, but at the same time also focuses on the purity and transparency of the ingredients (Fig. 4). Distinguishing advantages such as "Made in Germany" (regionalism, home orientation) or functionalities such as "better shelf life" are also gaining in importance compared to the current purity law orientation. The younger the consumers are, the more important transparency, sustainability, naturalness and the origin of the ingredients become: "Hops and malt".

- God preserve it" (plus water and yeast) seems too little from today's point of view to get young people more enthusiastic about beer.

Last but not least, we summarise in a few key theses how consumers today want or imagine beer tomorrow:

1. Consumers' drinking behaviour is oriented towards megatrends (sustainability, self-optimisation, drinkability, "herbiness" ...), which is also relevant for access to beer.
2. New beer consumers do not necessarily drink "differently", but they need particularly simple everyday access.
3. Beers (also new, fruity, herbal, mixed ...) need concrete occasions to be easily integrated into everyday life and become a trend. ■