

Welcome to the 2022 NanoCon Online!

Understanding Nanobrewery Customer Motivations

Presented by Michael Varda

Founder at Craft Beer Advisory Services



Craft Beer
Advisory Services

We will begin shortly. In the meantime,
introduce yourself in the chat with...



Name



Title



Brewery or Organization



What You Care About Most
When Going to a Brewery



Understanding Nanobrewery Customer Motivations

Saturday, November 5, 2022
2:20pm-3:15pm



Presented by Michael Varda
Founder at Craft Beer Advisory Services



Context For Today's Session

Who We Are



Corporate Research Experience

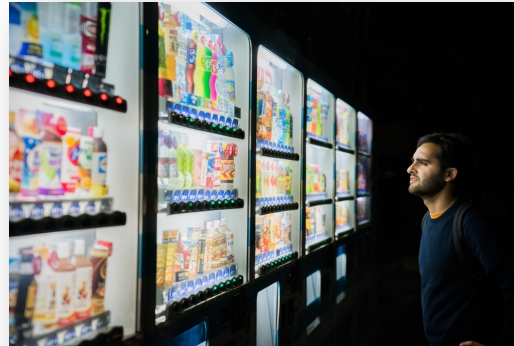


Passion for Craft Beer



Craft Beer Advisory Services

What We Do



Consumer Motivations



Brand Perceptions



Market Research

Today's Session



Types of Consumers and their Motivations



Competitors for each Consumer Type



Live Exercise Estimating your Customer Base

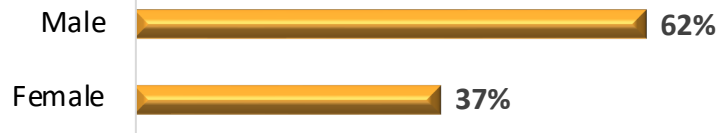


Study Demographics and Methodology

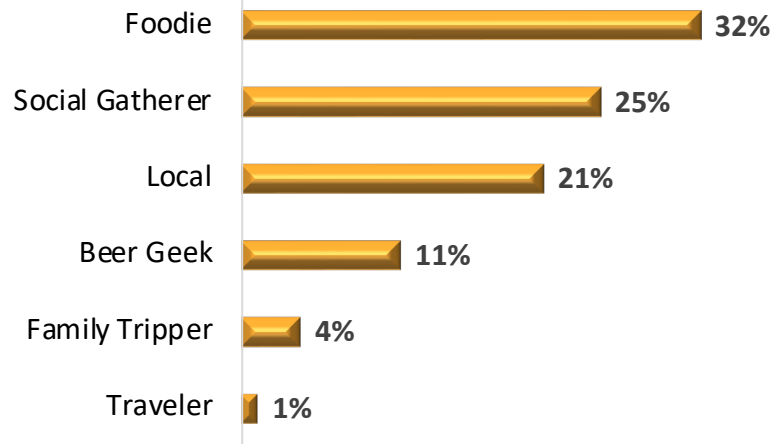


487 reviews from 2022
spanning 20 randomly selected
nanobreweries in 17 states

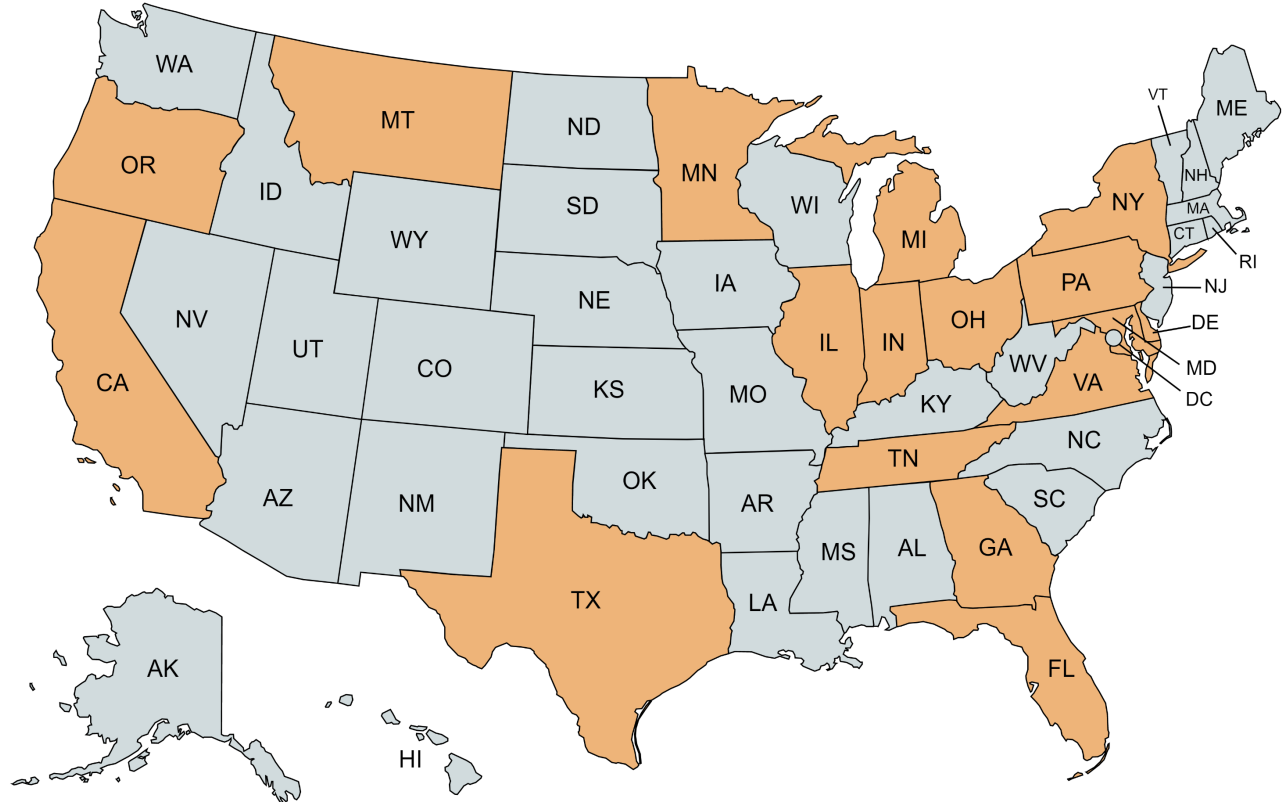
Gender Breakdown



Consumer Persona Breakdowns*



National Consumer Feedback Profile



*Percentages may not add up to an equal 100% due to tagging structure. Consumers who displayed character traits of multiple categories were counted in each.



Six Personas of Craft Beer Consumers



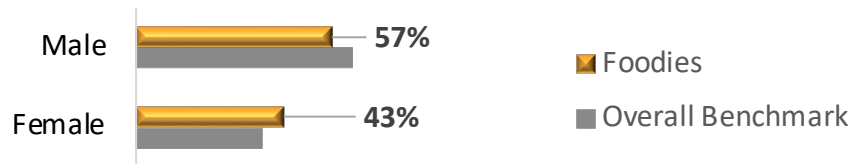
1. Foodies

(~32% of Consumers)

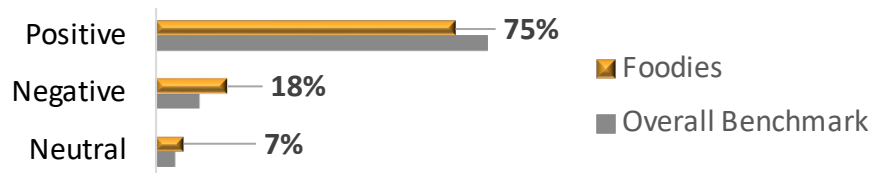


Foodies are customers primarily motivated by, believe it or not, food. Whether it is a full kitchen, limited offerings, food trucks, or even delivery services, Foodies need to eat on their visit otherwise they indicate a desire to go to another venue.

Foodies Gender Breakdown



Foodies Overall Sentiment



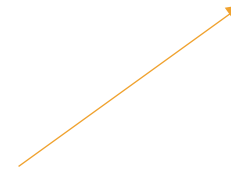
Foodies: Top Five *Return Visit Motivators* Vs. Top Five *Experience Detractors*

Positive Return Visit Motivators

- #1 Food
- #2 Beer Variety
- #3 Environment/Location
- #4 Service
- #5 Staff

Negative Experience Detractors

- Food #1
- Service #2
- Price #3
- Beer Variety #4
- Staff #5



Competitors: Traditional pubs/local bars, restaurants, food halls

Sample Review: "Their chicken wings are the best, so crispy and yummy!! And of course they have good beer options. It's crowded most of the time so I would recommend going early." - 10 months ago, Preethi V.

Key Takeaway: Ranking as the #1 motivator and #1 detractor, breweries need to offer food or allow deliveries to maintain the second-largest consumer persona segment



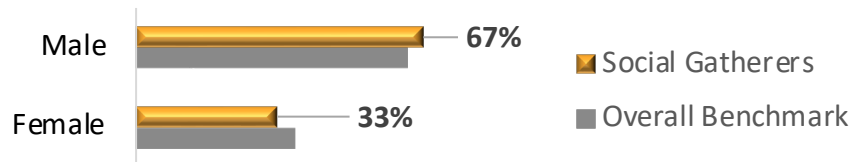
2. Social Gatherers

(~25% of Consumers)

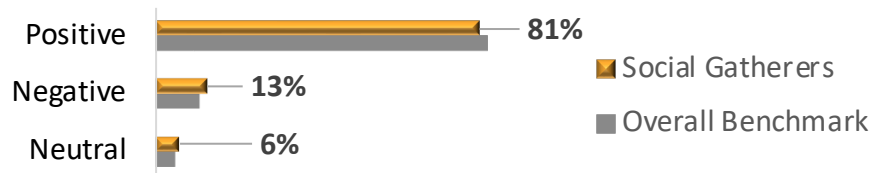


Social Gatherers are customers primarily motivated by environmental elements of their visits (e.g., outdoor seating, views). Their perceptions are impacted by staff interactions and service efficiency more than other persona groups.

Social Gatherers Gender Breakdown



Social Gatherers Overall Sentiment



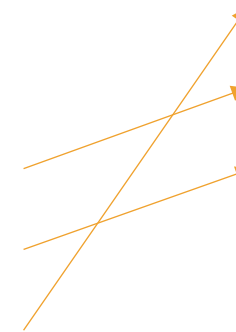
Social Gatherers: Top Five *Return Visit Motivators* Vs. Top Five *Experience Detractors*

Positive Return Visit Motivators

- #1 Environment/Location
- #2 Beer Variety
- #3 Food
- #4 Staff
- #5 Service

Negative Experience Detractors

- Service #1
- Food #2
- Staff #3
- Price #4
- Restrooms/Facilities #5



Competitors: Traditional pubs/local bars, breweries, wineries

Sample Review: “Fun place. Love the outdoor patio area. Sits on the north branch of the river. Service is great. Nice variety of beers on tap. Parking is easy too.”
- 10 months ago, Liz K.

Key Takeaway: Driven by vibes and social interaction, Social Gatherers are extremely common and have very little deviation from the overall sentiment benchmark.



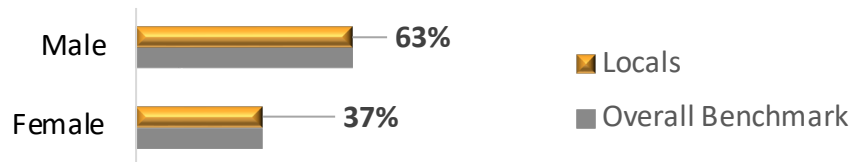
3. Locals

(~21% of Consumers)*

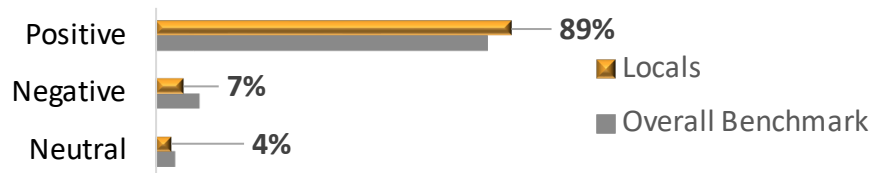


Locals are the backbone of any small business and many breweries. While they not be the most active online, they tie for first in terms of service importance. Relationships keep locals coming back just as much as the beer.

Locals Gender Breakdown



Locals Overall Sentiment



*Percentage of locals cannot be fully estimated due to the nature of online reviews.

Locals: Top Five *Return Visit Motivators* Vs. Top Five *Experience Detractors*

Positive Return Visit Motivators

- #1 Food
- #2 Beer Variety
- #3 Environment/Location
- #4 Staff
- #5 Specific Beer

Negative Experience Detractors

- Service #1
- Food #2
- Staff #3
- Price #4
- Beer Variety #5



Competitors: Local pubs, restaurants

Sample Review: "I have been going here off and on for over 15 years. This was the local's place to go for a variety of consistently good food and beer. They added a Cubano to their menu and it was DELICIOUS. Also, our server was awesome." - 8 months ago, Shannon L.

Key Takeaway: As the backbone of the many nanobreweries, they love supporting their local spots. Keeping service top notch will keep them from negative reviews.



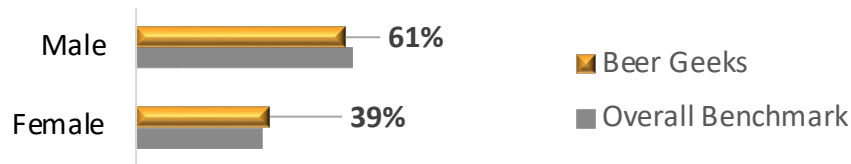
4. Beer Geeks

(~11% of Consumers)

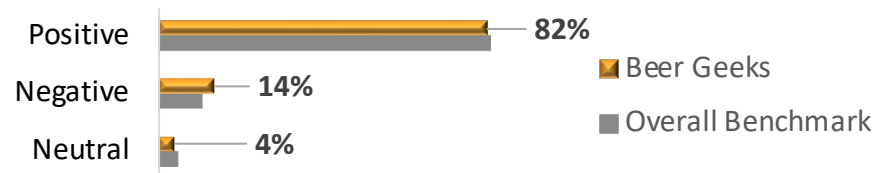


Beer Geeks are customers committed to the true craft behind your beer. From different hops to other tasting notes, their expectations are high. Your beer will impact perceptions of overall experiences more than any other factor.

Beer Geeks Gender Breakdown



Beer Geeks Overall Sentiment



Beer Geeks: Top Five *Return Visit Motivators* Vs. Top Five *Experience Detractors*

Positive Return Visit Motivators

- #1 Beer Variety
- #2 Specific Beer
- #3 Food
- #4 Environment/Location
- #5 Staff

Negative Experience Detractors

- Service #1
- Food #2
- Beer Variety #3
- Price #4
- Staff #5



Competitors: Specialty pubs, breweries, craft beer bars

Sample Review: “Nice stop on a rainy day! Lobster roll with potato chips and Pineapple Express IPA. The Pineapple Express IPA was way too bitter and tasted more like grapefruit. I sampled another IPA but can't remember the name, it was less bitter for sure compared to the pineapple.” - 12 months ago, Mallory D.

Key Takeaway: Beer Geeks are extremely close to the average overall sentiment. 8 in 10 with positive experiences – most find something to their delight



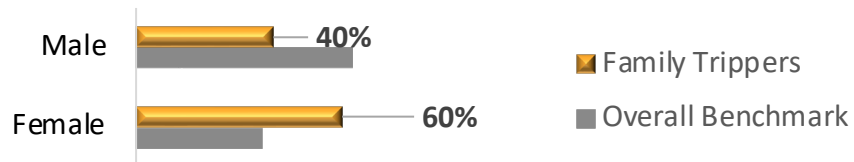
5. Family Trippers

(~4% of Consumers)

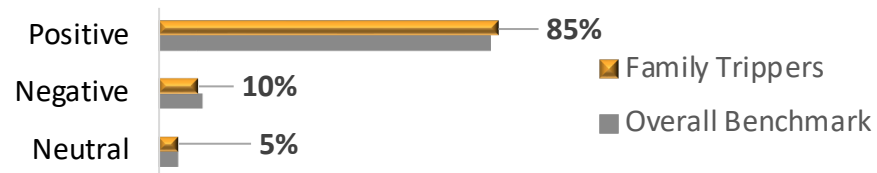


Family Trippers focus on the experience for their partner, kids, and even the dog. Aspects like environment, facilities, and overall accessibility rank much higher than other persona groups. It takes more than good beer to bring these folks back.

Family Trippers Gender Breakdown



Family Trippers Overall Sentiment



Family Trippers: Top Five *Return Visit Motivators* Vs. Top Five *Experience Detractors*

Positive Return Visit Motivators

- #1 Beer Variety
- #2 Food
- #3 Environment/Location
- #4 Pet Friendly
- #5 Staff

Negative Experience Detractors

- Service #1
- Staff #2
- Price #3
- Child Restrictions #4
- Pet Restrictions #5

Competitors: Local restaurants, family activity hubs (e.g., movies, bowling)

Sample Review: “We had the best experience! The food and drinks came out quickly using the QR Code. Their beer and seltzer were so good and everyone loved the food! The kids had fun too playing corn hole!
- 9 months ago, Meg C.

Key Takeaway: Family Trippers need all parties to be welcomed and satisfied whether that is with food, activities, and don't forget good beer for the parents



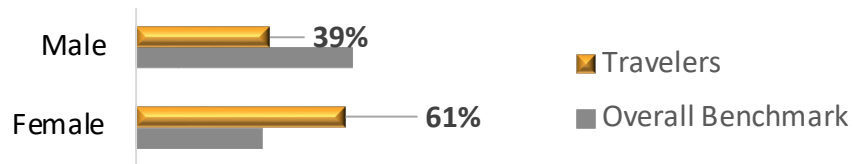
6. Travelers

(~1% of Consumers)*

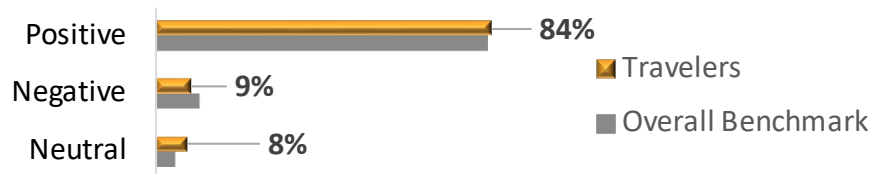


Travelers are non-locals primarily seeking experiences. Aspects including environment, social interactions, and taproom attributes typically make or break experiences. Service is also more important to travelers than other personas.

Travelers Gender Breakdown



Travelers Overall Sentiment



*Data shown from previous study with non-nanobreweries

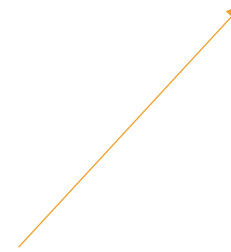
Travelers: Top Five *Return Visit Motivators* Vs. Top Five *Experience Detractors*

Positive Return Visit Motivators

- #1 Beer Variety
- #2 Food
- #3 Environment/Location
- #4 Specific Beer
- #5 Staff

Negative Experience Detractors

- Service #1
- Staff #2
- Food #3
- Price #4
- Restrooms/Facilities #5



Competitors: Tourist spots, experience-based restaurants

Sample Review: "I'm giving 4 stars because even as a non-beer drinker I thoroughly enjoyed the huge patio. My two beer guzzling compatriots enjoyed their beer and if this wasn't 10 hours from home, I believe they would be back to try more!"
- 8 months ago, Merry L.

Key Takeaway: Travelers are generally more positive guests but pay particular attention to staff and service interactions



Top Motivators and Detractors by Persona

Foodies

Motivators		Detractors	
#1	Food	#1	Food
#2	Beer Variety	#2	Service
#3	Environment/Location	#3	Price
#4	Service	#4	Beer Variety
#5	Staff	#5	Staff

Social Gatherers

Motivators		Detractors	
#1	Environment/Location	#1	Service
#2	Beer Variety	#2	Food
#3	Food	#3	Staff
#4	Staff	#4	Price
#5	Service	#5	Restrooms/Facilities

Locals

Motivators		Detractors	
#1	Food	#1	Service
#2	Beer Variety	#2	Food
#3	Environment/Location	#3	Staff
#4	Staff	#4	Price
#5	Specific Beer	#5	Beer Variety

Beer Geeks

Motivators		Detractors	
#1	Beer Variety	#1	Service
#2	Specific Beer	#2	Food
#3	Food	#3	Beer Variety
#4	Environment/Location	#4	Price
#5	Staff	#5	Staff

Family Trippers

Motivators		Detractors	
#1	Beer Variety	#1	Service
#2	Food	#2	Staff
#3	Environment/Location	#3	Price
#4	Pet Friendly	#4	Child Restrictions
#5	Staff	#5	Pet Restrictions

Travelers

Motivators		Detractors	
#1	Beer Variety	#1	Service
#2	Food	#2	Staff
#3	Environment/Location	#3	Food
#4	Specific Beer	#4	Price
#5	Staff	#5	Restrooms/Facilities



Live Exercise



Live Exercise Instructions



Navigate to:

<https://www.tryinteract.com/share/quiz/62391a0dfc8178a0018d97991>



Answer questions based on your brewery



Return in 4-6 minutes to discuss implications

If you cannot participate live, don't worry!

You can take the quiz at any time, and you will have access to implications via your results as well as this presentation.



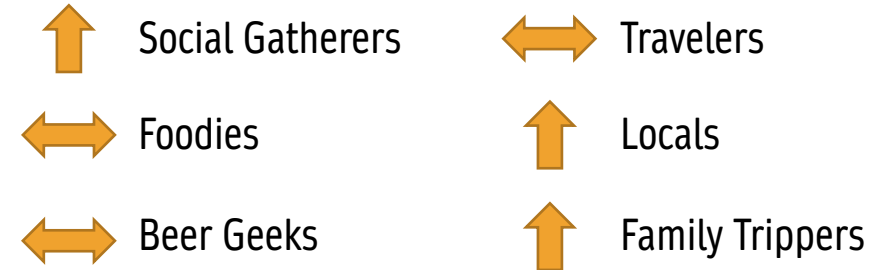
Implications from Results



Result 1: Local/Regional Hangout

People come to hang, drink, and be happy. Your spot attracts lots of social gatherers, locals, and even some families. Beer Geeks are on the rise as you continue developing your craft. You may not get a ton of Travelers and may not be Foodies' first choice, but you can make everyone happy with that amazing bar staff.

Persona Groups



Brand

 Consider expansion goals (if any)

 Maintain uniformity to develop reputation

Offerings

 Focus on environment upgrades and food offerings

 Ensure entertainment on days likely to host families

Marketing

 Inject socialization elements into posts

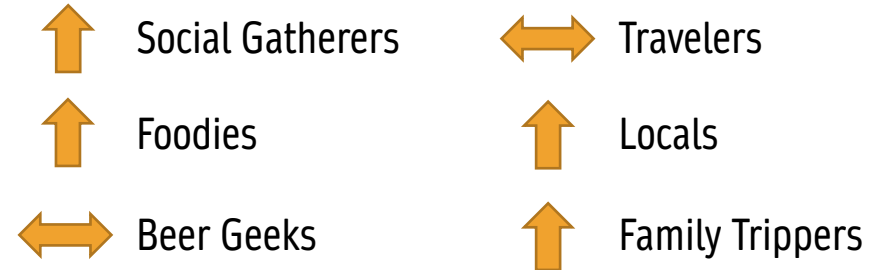
 Consider limited geographic targeting



Result 2: Full-Service Attraction

Your brewery is truly a spot for all. It attracts Social Gatherers, Foodies, Locals, and Families. Everyone has something to be excited about whether it is the beer, the food, the entertainment, or the yard games. You may not be a Beer Geek's top destination and Travelers may seek a different experience, but you'll have some of both trickle in.

Persona Groups



Brand



Consider target market/ideal experience



Decide key value proposition/brewery strengths

Offerings



Upgrade based on envisioned ideal experience



Offer regular food specials/seasonal items

Marketing



Promote beer and food pairings



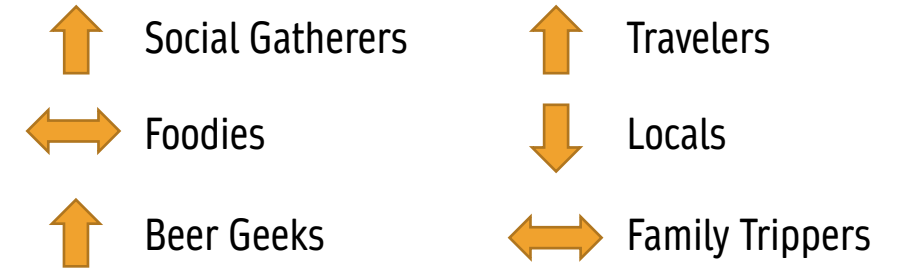
Mention meal deals/discounts for price-conscious consumers



Result 3: Destination Brewery

You're well-known and folks travel to come and see you. But since they traveled so far, the expectations are high. Social Gatherers want to chat it up. Beer Geeks are looking for the Brewer to chat about the latest release. Travelers have been waiting to check out the taproom all year. You may not get as many Locals as other spots since they can get your beer off the shelves, but you're doing just fine.

Persona Groups



Brand



Monitor word of mouth content on social platforms



Ensure social media channels represent uniform voice

Offerings



Consider limiting changes (unless you're known for changing often)



Invest in the brewery tour experience

Marketing



Focus on beer releases, food offerings, and events



Consider paid media campaigns to unlock new geographies



A Special Thanks To...



Q & A

