

Beer Bloggers Conference

July 17, 2015

Julia Herz

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Credit Where Credit Is Due

- Beer bloggers make news and advance the conversation.
- Beer bloggers challenge appreciators to dig deeper.
- Beer bloggers better the beverage of beer.



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Today's Theme

Beer!



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What I'll Cover

- Today's Beer Blogger
- Today's Beer Lover
- Today's Craft Brewers
- Some Musings



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My background

- Craft Beer Program Director
Brewers Association: Boulder, CO
- Publisher CraftBeer.com
– ‘Craft Beer Muses’ Blog on CraftBeer.com



SAVOR THE FLAVOR RESPONSIBLY



(savor)

an american craft beer & food experience



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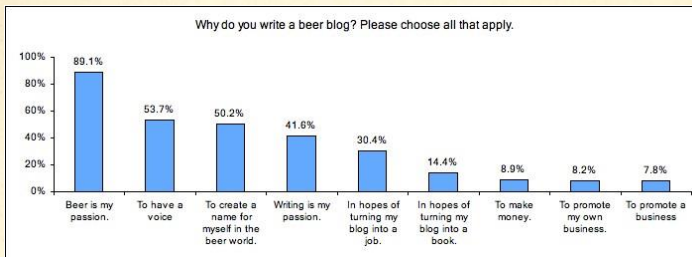
Today's Beer Blogger



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Why Blog?



Source: 2013 State of Beer Blogging, Zephyr Adventures



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The Microphone



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Today's Beer Lover



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Today's Craft Beer lover

- 32% of craft is from women
- 22% of appreciators make less than \$50K a year (based on household income)
- 40% make less than \$75K
- 38% are 21-34
- 62% are 35+



Source: Nielsen Spectra

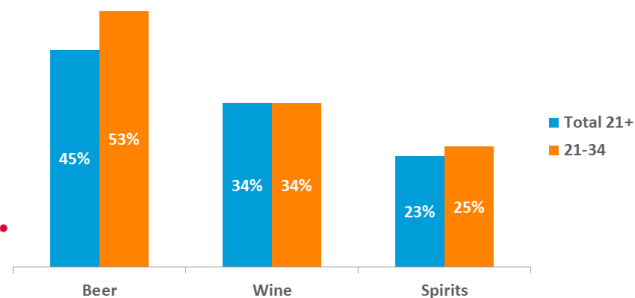
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LOCAL IS MOST IMPORTANT TO THE BEER BUYER, EVEN MORE PRONOUNCED AMONG 21-34 YEAR OLDS

How important is being locally made in your purchase decision for

Base: consumers 21+ who drink each category at least several times a year (total U.S.)



Nielsen QuickQuery Omnibus survey (Feb.12-17, 2015); National

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Very/Somewhat Important When Choosing Craft

- Flavor 99%
- Freshness 94%
- Aroma 79%
- Ingredients 75%
- Bitterness 71%
- Appearance 60%
- High alcohol 47%
- Low alcohol 16%



Source: BA commissioned Nielsen Omnibus Panel-2014

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Do You Use Date Codes When Purchasing?

- Yes 37%
- No 50%
- I don't know what a date code is. 13%



Source: BA Commissioned Nielsen Omnibus Panel

Today's US Brewers



What is Quality?

- A beer that is responsibly produced using wholesome ingredients, consistent brewing techniques and good manufacturing practices, which exhibits flavor characteristics that are consistently aligned with both the brewer's and beer drinker's expectations.



FOCUS ON BEER QUALITY

THE QUALITY PRIORITY PYRAMID

The Quality Subcommittee created the Quality Priority Pyramid to provide a shared concept of what a solid quality program should be. In addition, the steps of the pyramid give us a visual representation of what aspects are covered and which are most of importance. Items at the base of the pyramid are foundations of any quality program and should be tackled first. Items higher up the pyramid are more important only after the foundations have been established.

- 1. GOOD MANUFACTURING PRACTICES (GMP)**
 The foundation of any quality program is the ability to consistently produce a product that meets the requirements of the consumer. This includes the use of good manufacturing practices (GMP) and the implementation of a quality management system (QMS).
 / Research and Develop
 / System Integration
 / Process Control and Analysis
 / Hazard Analysis and Critical Control Points (HACCP)
 / Sanitation and Hygiene
 / Safety and Compliance
- 2. HAZARD ANALYSIS & CRITICAL CONTROL POINTS (HACCP)**
 HACCP is a systematic approach to the identification, evaluation, and control of hazards in a process. It is a key component of a food safety and quality management system (FSQMS).
 / Hazard Analysis
 / Critical Control Points (CCPs)
 / Monitoring and Control
 / Corrective Action
 / Verification
- 3. STANDARDS**
 Standards are the benchmarks that define the quality of a product. They are the foundation of a quality management system (QMS).
 / Research and Develop
 / System Integration
 / Process Control and Analysis
 / Hazard Analysis and Critical Control Points (HACCP)
 / Sanitation and Hygiene
 / Safety and Compliance
- 4. PROCESS CONTROL AND ANALYSIS**
 Process control and analysis are the tools used to ensure that a process is consistently producing a product that meets the requirements of the consumer. This includes the use of process control and analysis (PCA) and the implementation of a quality management system (QMS).
 / Research and Develop
 / System Integration
 / Process Control and Analysis
 / Hazard Analysis and Critical Control Points (HACCP)
 / Sanitation and Hygiene
 / Safety and Compliance
- 5. SHELF LIFE AND STABILITY**
 Shelf life and stability are the measures used to ensure that a product remains safe and of high quality throughout its shelf life. This includes the use of shelf life and stability testing (SLST) and the implementation of a quality management system (QMS).
 / Research and Develop
 / System Integration
 / Process Control and Analysis
 / Hazard Analysis and Critical Control Points (HACCP)
 / Sanitation and Hygiene
 / Safety and Compliance
- 6. PREVENTIVE MAINTENANCE AND SPECIAL PRODUCTS**
 Preventive maintenance and special products are the measures used to ensure that a product remains safe and of high quality throughout its shelf life. This includes the use of preventive maintenance and special products (PMSP) and the implementation of a quality management system (QMS).
 / Research and Develop
 / System Integration
 / Process Control and Analysis
 / Hazard Analysis and Critical Control Points (HACCP)
 / Sanitation and Hygiene
 / Safety and Compliance

THE QUALITY PRIORITY PYRAMID

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DRAUGHT BEER QUALITY
FOR RETAILERS**

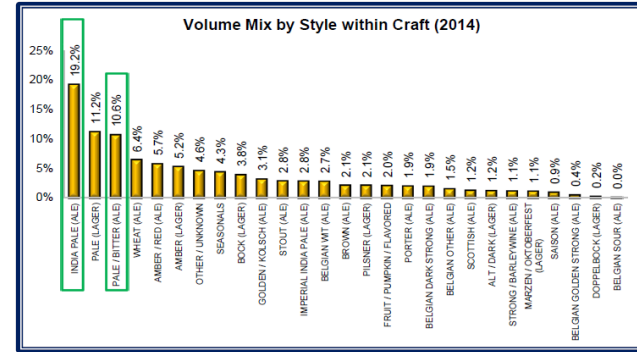
**draught beer
quality manual**

**BA
BREWERS
ASSOCIATION**

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IPA'S AND PALE ALES CONTINUE TO BE TWO OF THE MOST POPULAR CRAFT STYLES, COMBINING FOR 30% OF CRAFT BEER SALES IN ON-PREMISE



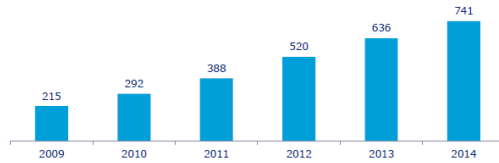
GuestMetrics data

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Source: GuestMetrics Full Year Ending Dec 31, 2014



**NUMBER OF IPA BRANDS SELLING
TOTAL U.S. SUPERMARKETS**

Count of IPA Brands



	2009	2010	2011	2012	2013	2014
AMERICAN	142	185	236	302	371	421
IMPERIAL	47	73	101	141	171	199
SESSION	3	3	5	7	14	28
ENGLISH	16	19	24	28	29	29
BELGIAN/WHITE	3	5	8	12	14	19
BLACK	2	3	9	16	20	25
OTHER	2	4	5	14	17	20
TOTAL	215	292	388	520	636	741

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Source: IRI Infoscan Total US FOOD 52 Weeks Ending Jan 4, 2015



Number of Breweries

- 3,500 Breweries
- 8,000 Wineries



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What Say You?

Too Many Beers?



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What You Fermenting With?

ALL BREWERIES

Size (annual production, bbls)	Ale Yeast(s)	Lager Yeast(s)	Weizen Yeast(s) (Phenolic Producing)	Belgian Yeast(s)	Brettanomyces	Lactobacillus	Pediococcus	Other
1-500	96.6%	72.4%	48.3%	65.5%	34.5%	27.6%	13.8%	6.9%
501-1,000	100.0%	66.7%	61.1%	72.2%	41.7%	38.5%	16.7%	2.8%
1,001-5,000	97.7%	76.7%	46.5%	74.4%	39.5%	37.2%	20.9%	0.0%
5,001-15,000	100.0%	69.0%	20.7%	72.4%	27.6%	31.0%	20.7%	0.0%
15,000+	100.0%	79.2%	37.5%	83.3%	45.8%	37.5%	25.0%	8.3%
All	98.8%	72.7%	44.1%	73.3%	37.9%	34.8%	19.3%	3.1%

Please list any yeast, flora and fauna you use to produce your beer (check all that apply):

Source: Brewery Operation Benchmarking Survey 2014



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Craft Brewers And Social Media

- Facebook=Almost 100%
- Twitter=91%
- Instagram=70%
- LinkedIn=): 6%



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Musings from Julia



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What Say You?

The Business of Beer Is Good Business



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What Say You?

Small and Independent Matters



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Size and % of U.S. Breweries

Bbls	2014	2013
500	46.50%	48%
1000	66.80%	68.50%
5000	89.50%	90.10%
>15,000	95.80%	95.80%



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What Say You?

20% Volume By 2020 is reasonable



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What Say You?

Homebrewing is Cool



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Homebrewing

- 1.2M homebrewers
- 815 US shops
- 1,700 homebrew clubs
- AHA membership:
–9,700 2005 to 45,307 now



HomebrewersAssociation.org



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What Say You?

Beer Is A Part of the Food Arts World



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Pairing

- Being new to pairing is like being visually impaired and not having reference to the primary colors.



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What Say You?

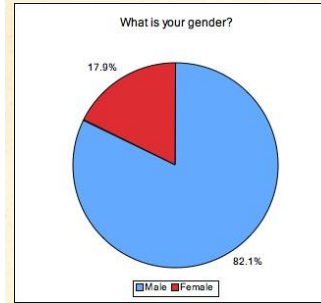
What is the Holy Grail for Beer At Retail



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What Say You?



Source: 2013 State of Beer Blogging, Zephyr Adventures

Women And Beer



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What Say You?

The Beer Belly Is A Myth



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What Say You?

Hot Topics To Know



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Hot Topics

- Federal Excise Tax Legislation
- Distribution in the U.S.
- FDA Menu Labeling
- Connect With State Brewers Guilds

BrewersAssociation.org



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Parting Words...

Wherever you go
there you are
so where do you
want to be?



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Thank you

Julia Herz

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Craft Beer Program Director
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