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MARKET WATCH™

The Real Drivers Behind Beer Category Performance in the UK

Moving Beyond Trends to Understand What Is Actually Driving Growth

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Oxford's Smart Data Ecosystem …

Understanding Hospitality through 'real-world' behaviour … not surveys, not assumptions



58 M
Mobile Devices Tracked Daily

→ **Venue & Store Mapping & Footfall**
Where Consumers go and how long they stay



18 M
Banking Customers Analysed

→ **Banking & Transaction Data**
What they actually spend and where





UK Universe
Full On & Off Trade Outlet Coverage

→ **Flowmeter Volumetrics & Pricing Insights**
What moves, at what price, in which channel



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Source : Oxford Partnership | May 26

The Beer Market Is Fragmenting …

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One beer market no longer exists. Consumer behaviour is polarising — and the gap is widening.



Experience Seekers

Premium & Discovery Occasions

Trading up as Standard

Higher Dwell Time & Social Spend

Experience-Led, Occasion-Driven



Value Led Consumers

Trusted, Familiar Brands

Affordability & Sessionability

Lower frequency On Trade visits

Greater shift to Home Drinking

These are not segments … they are the same consumers making different choices on different days. The real challenge is winning across both.

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Why Stout became the 'standout' winner ...



Recruitment of Females & Younger Audience

Lifestyle Shifts & Perception



Influencers have boosted the popularity

Viral Social Media Trends
'splitting the G'



Sporting Occasions, deeply embedded in Live Sport

Sports Partnerships



Moderation trend is here to stay 'zebra drinking'

Rapid Recruitment of Guinness 0.0%

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Source : Oxford Partnership | May 26

Occasion Shift Is Reshaping Volume ...

The real shift is not demographic. It is occasion-based … and it is structural.

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Late Night is softening

Spontaneous late-night occasions are declining as consumers become more intentional.

Midweek & Earlier Occasions Growing

Earlier Evenings, Midweek Socialising & Food-Led Experiences are gaining ground

COVID Changed in Home Drinking ... permanently

The in-home experience was elevated impacting serves (home measures) and price awareness

At-Home Occasions More Intentional

Premium packaged beer, shared sporting occasions and convenience-led socialising are reshaping repertoires.

Going Out — But Expecting More

When consumers do go out, expectations around experience, atmosphere and occasion value are significantly higher.

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Sessionability is becoming Strategic

Sessionability is no longer simply about moderation … it is becoming a commercial and economic imperative.



- **Lower ABV relevance is rising**
  Longer Dwell Occasions and more measured drinking are driving structural demand.
- **Taxation & price sensitivity converging**
  Duty structures and consumer affordability are pushing both brewer and shopper toward lower strength.
- **No & Low is growing in Premium**
  Premium No & Low is expanding the moderation occasion without sacrificing brand equity.

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Source : Oxford Partnership | May 26

Premiumisation has evolved …

Premium is no longer defined by price alone … it is defined by meaning.



Old Premium

Luxury cues & higher strength
Status & trade-up messaging
Price as the primary signal

New Premium

Experience, authenticity & Occasion Fit
Discovery & social currency
Meaning as the primary signal

Consumers now pay more for meaningful experiences … not simply expensive products.

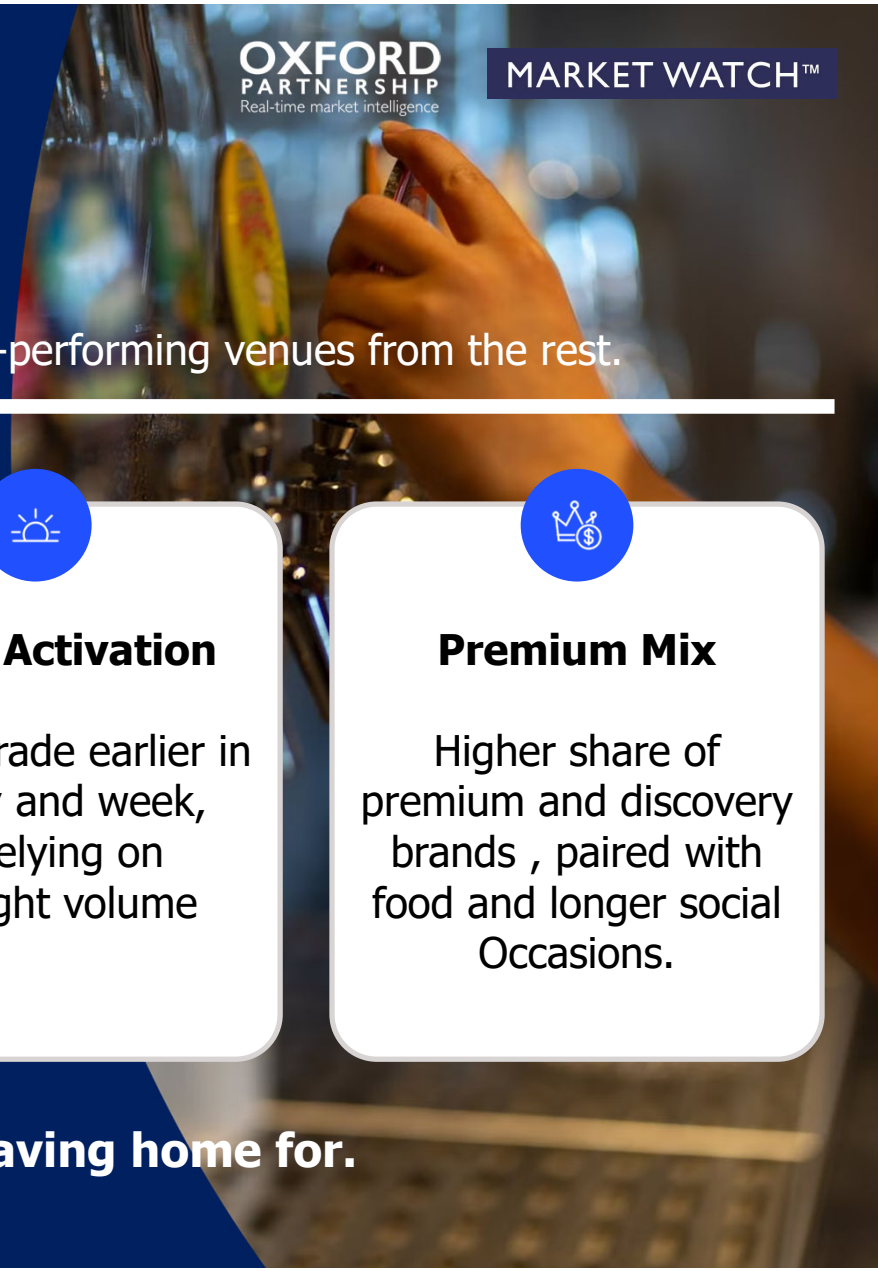
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What Winning Venues are doing differently ...

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Oxford's behavioural data consistently identifies what separates high-performing venues from the rest.

Higher Dwell Time

Winning venues engineer longer visits through atmosphere, occasion programming and premium range

Better Review Scores

Experience quality drives advocacy. Top venues consistently outperform on digital sentiment

Earlier Activation

Building trade earlier in the day and week, not relying on late-night volume

Premium Mix

Higher share of premium and discovery brands , paired with food and longer social Occasions.

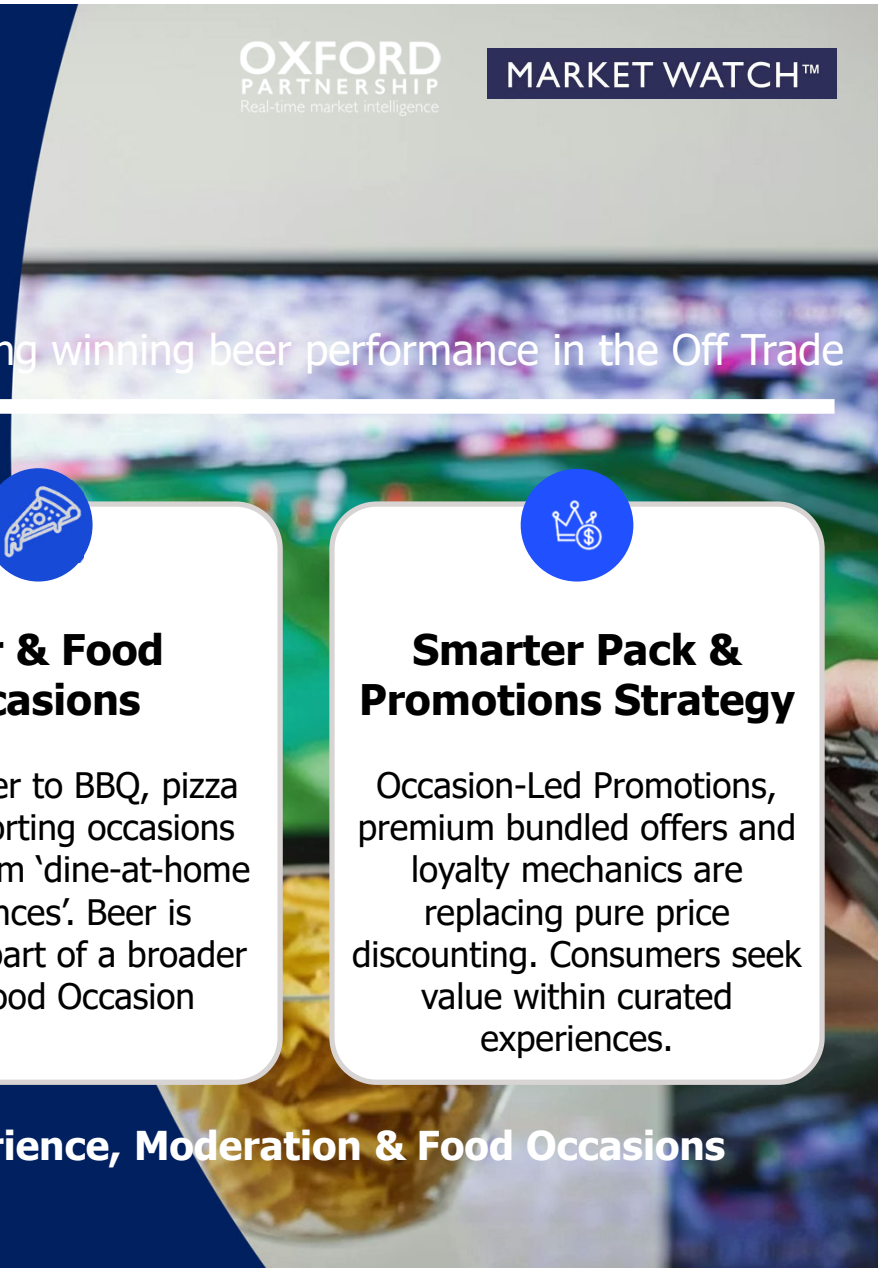
The best performing venues create occasions worth leaving home for.

What Winning Retailers are doing differently …

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Oxford's behavioural & retail insights highlights the key drivers shaping winning beer performance in the Off Trade



Chilled Convenience

Expanding chilled beer space, premium single serve and meal-for-tonight missions. Consumers expect beer to be ready to drink … immediately.

Moderation & Lower ABV

Greater fixture visibility for No & Low, alcohol-free and sessionable formats. Consumers are pacing occasions and balancing wellbeing with socialising.

Beer & Food Occasions

Linking beer to BBQ, pizza nights, sporting occasions and premium 'dine-at-home experiences'. Beer is becoming part of a broader social Food Occasion

Smarter Pack & Promotions Strategy

Occasion-Led Promotions, premium bundled offers and loyalty mechanics are replacing pure price discounting. Consumers seek value within curated experiences.

The brands that align most effectively to Convenience, Experience, Moderation & Food Occasions will win disproportionate Off Trade growth…

What this means for Brewers …

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Six strategic priorities for growth in an Occasion-Driven Market

01

Build for Occasions, not Demographics

Align brand architecture to when and how consumers drink … not who they are.

02

Think in session architecture

Design portfolios around dwell time, pacing and occasion length.

03

Create clearer Pricing Ladders

Give consumers a credible route from value to premium within your range

04

Win Earlier & Midweek Occasions

The volume opportunity has shifted … be present where growth is actually happening..

05

Balance Premium with Reassurance

Trusted brands matter more in uncertain economic conditions … do not abandon them.

06

Align brands to behavioural Occasions

Winning brands map naturally to how consumers organise their social lives.

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What this means for Beer…

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The winning strategy for 2026 and beyond will be built around occasion dynamics, not category assumptions.



Sessionable Beer Wins Longer Occasions

Greater relevance for lower ABV, paced drinking and premium No & Low as occasions extend.



Premium Wins … But Differently

World Lager, discovery Brands & Experience-Led choices over simple trade-up.



Food & Beer Occasions Will Grow

Broader Drinking repertoires, earlier Social Occasions and stronger Food overlap.



Trusted Brands Matter More Again

Familiarity, accessibility and value perception are becoming competitive advantages.

The biggest opportunities will go to brewers who understand how consumers want to **experience** major Occasions … longer, more socially and more selectively.

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The Market is not shrinking. it is reorganising …

Understanding behavioural dynamics is now more important than following trends.



- **Why ?**
  Understand why consumers choose Occasions over Categories
- **How ?**
  Track how behaviour is shifting across Channels & Occasions
- **Where ?**
  Identify where Value is moving … and be present there first…
- **Fit ?**
  Align beer to evolving Social Experiences, not legacy assumptions

The future winners in Beer will be those who understand Occasions better than Categories.

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