


# Craft Beer Study

Greenville Beer Exchange  
January 2020

  
**Package InSight**  
ACCELERATING DESIGN TO MARKET

**CO  
DO**



Package InSight, LLC is a leader in fast moving  
consumer good packaging quantification  
and qualification services.

3620 Pelham Rd. #294  
Greenville, SC 29615  
[www.PackageInSight.com](http://www.PackageInSight.com)



# Study Design

# Study Qualifications

- 96 shoppers participated in this study to capture data on consumer attention for different types of beer cans and bottles
- Participants were screened prior to the study.  
Qualification Criteria:
  - Over 21 years of age
  - Purchased Beer in the last two months
  - Regularly purchased beer to consume at home at least once a month
  - Purchased craft beer brands
  - Open to trying new styles and/or brands of craft beer
  - Regularly shops at locally owned bottle shops



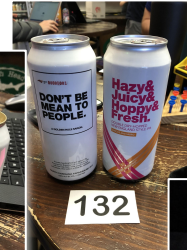
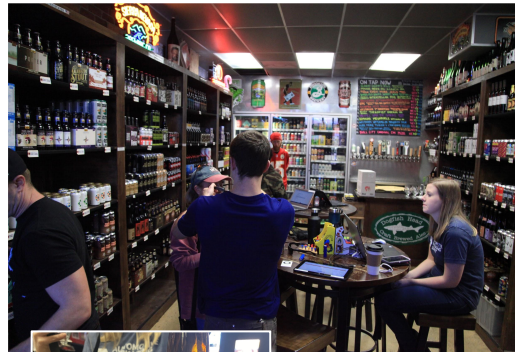


# Store Setup





Participants were checked in when they arrived at the Greenville Beer Exchange, and were fitted and calibrated with Tobii 2 eye tracking glasses. They were instructed to shop the “main” portion of the store only (US Craft brewery selection) and choose 2 single beers that they would be purchasing to take home at the end of the study. Once they completed their shopping, their purchases were photographed and the participants completed an online post-shopping survey to capture qualitative feedback and demographics. When the survey was complete, they purchased their two items and were given a \$20 gift card to return to the Greenville Beer Exchange at a later date.



# Cooler 1-2-3





## Left Shelf 1-2-3





## Left Shelf 4-5



# Right Shelf 1-2-3







# Eye Tracking





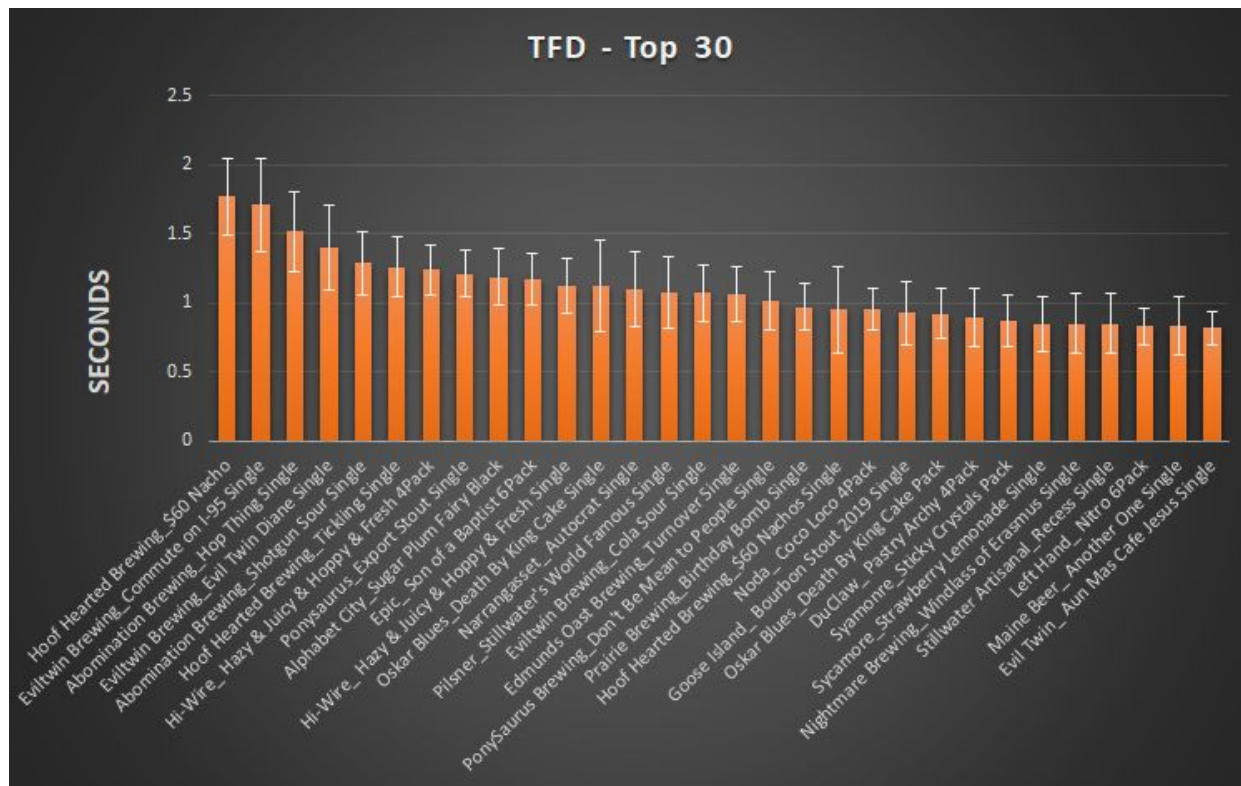
# Eye Tracking Metrics

In this report, you will see several abbreviations used to describe the eye tracking metrics. These are:

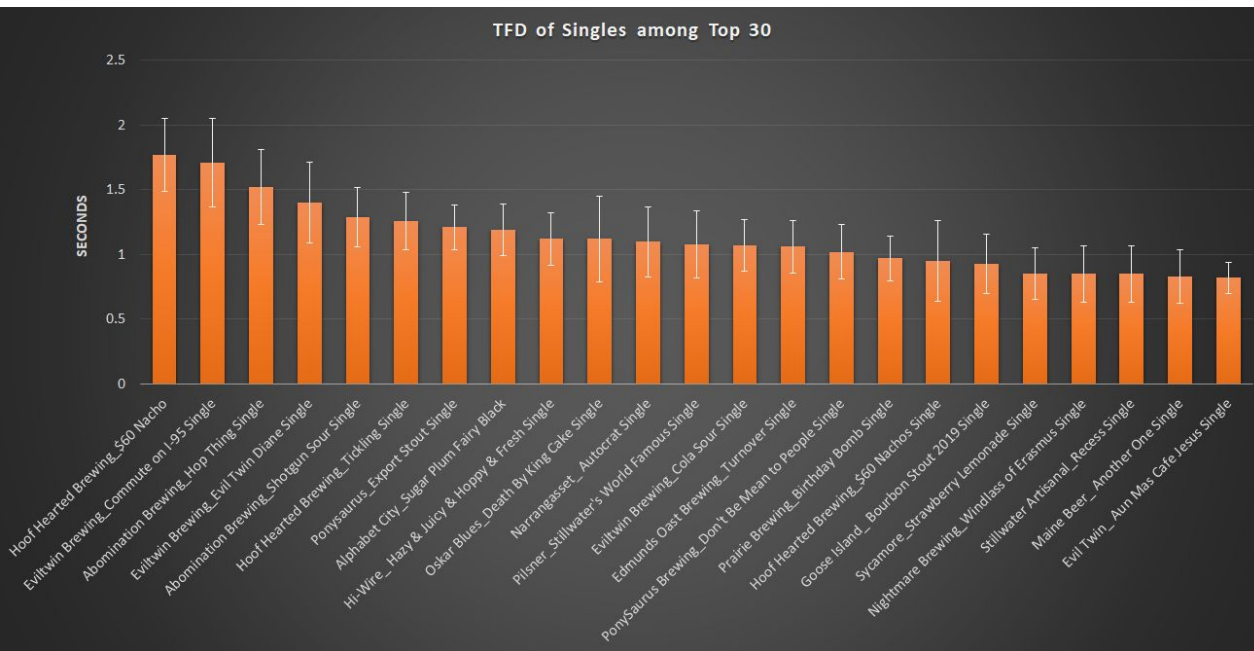
- Total Fixation Duration (TFD)
  - ◆ How long did they look? The time, in seconds, spent on average by participants fixating on this item. The higher the number, the better the package performed.
- Time To First Fixation (TTFF)
  - ◆ How quickly did they see? The time, in seconds, from when a product first enters a participant's field of view until they fixate on it. The lower the number, the better the package performed.
- Fixation Count (FC)
  - ◆ How often did they look? The total number of times a participant's scan of the planogram crossed into a particular area of interest.
- Purchase Decision (PD)
  - ◆ Measures how many participants chose to buy the item. The higher the number, the better the package performed

# TFD Findings - Top 30

Higher numbers  
are better for this  
metric



# TFD of Singles among Top 30



- The Evil Twin brand was most common in the top TFD SKUs—4 of their beers are in the top tier.
- Hoof Hearted and Abomination Breweries are also well-represented in the top fixation SKUs



# TFD Singles - Top 1



Location on Right Shelf 2



Hoof Hearted Brewing\_ \$60 Nacho

Heavily illustrated

Minimal branding

Pressure sensitive

Design Trend

## TFD Singles - Top 2



Location on Right Shelf 2



Eviltwin Brewing\_Commute on I-95 Single

*Interesting note: This was only one of two top-attention SKUs with zero purchases*

Heavily illustrated

Minimal branding

Pressure sensitive

Design Trend

# TFD Singles- Top 3



Location on Right Shelf 2



Abomination\_Hop Thing Single

Heavily illustrated

Minimal branding

Pressure sensitive

Design Trend





# TFD Singles - Top 4



Location on Right Shelf 2



EvilTwin Brewing\_Diane Single

Minimalism

Patterning

Pressure sensitive

Design Trend



# TFD Singles- Top 5



Location on Right Shelf 2



Abomination\_Shotgun Sour Single

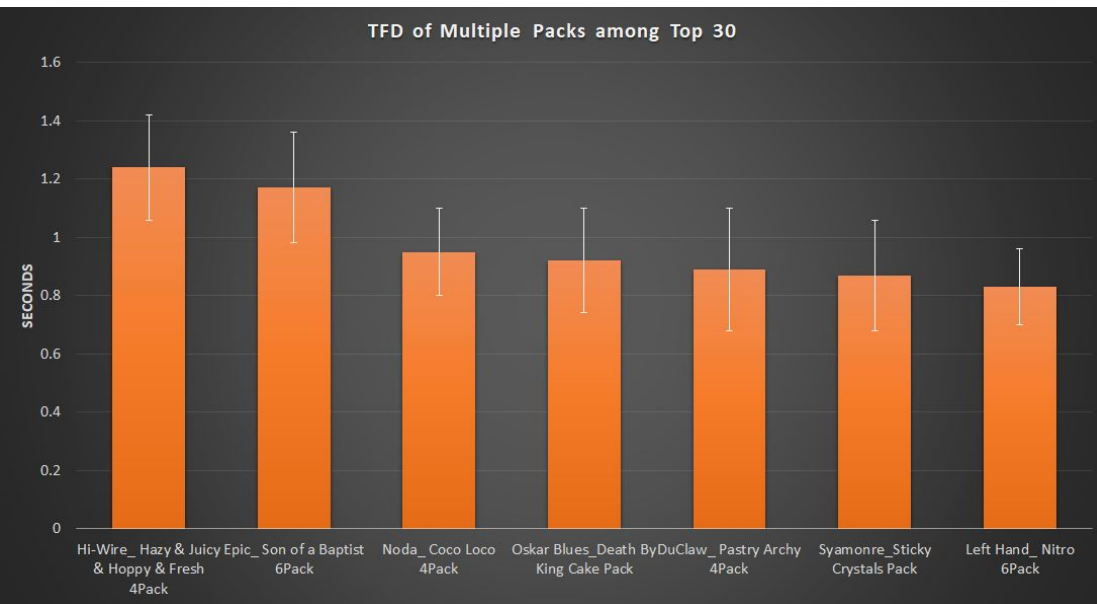
Heavily illustrated

Minimal branding

Pressure sensitive

Design Trend

# TFD of Multiple Packs among Top 30



# TFD Packs- Top 1



Location on Left Shelf 4



Hi-Wire\_ Hazy & Juicy & Hoppy & Fresh 4Pack

White Out

Minimal branding

Pressure sensitive

Slash Design  
Element?

Design Trend



# TFD Packs- Top 2



Location on Left Shelf 3



Epic\_ Son of a Baptist 6Pack

Small can

Paktech

Design Trend



# TFD Packs- Top 3



Location on Left Shelf 5



Noda\_ Coco Loco 4Pack

Heavily illustrated

Paktech

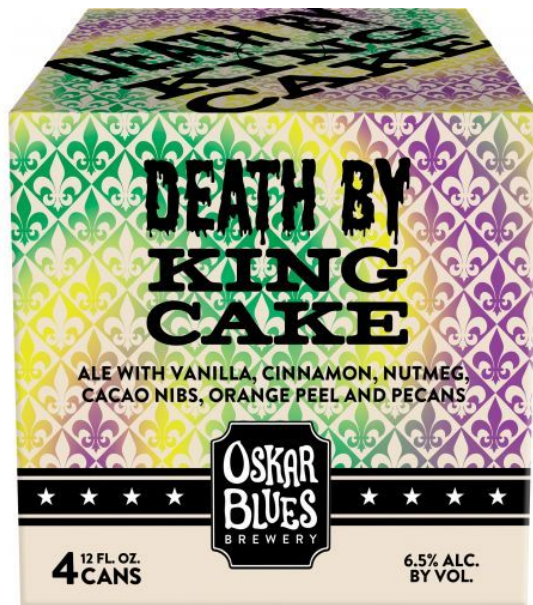
Shiny

Design Trend

# TFD Packs- Top 4



Location on Right Shelf 1



Oskar Blues\_Death By King Cake Pack

Patterned

Can Box

Billboarding

Design Trend



# TFD Packs- Top 5



Location on Left Shelf 3



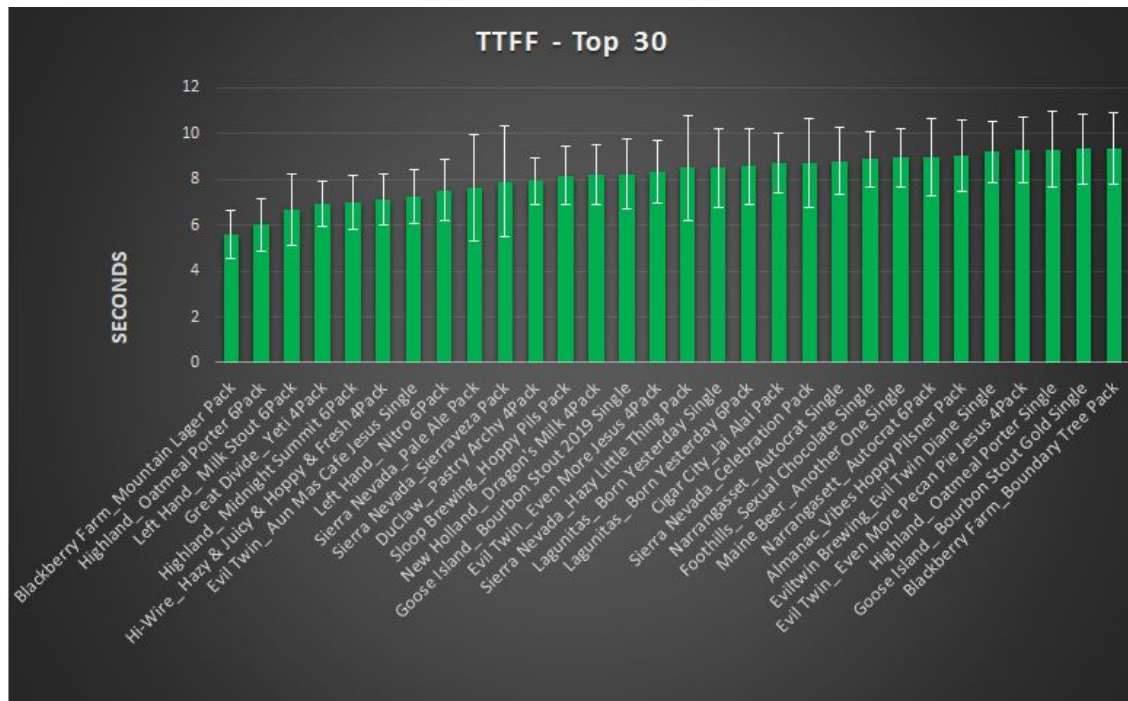
DuClaw\_ Pastry Archy 4Pack

Paktech

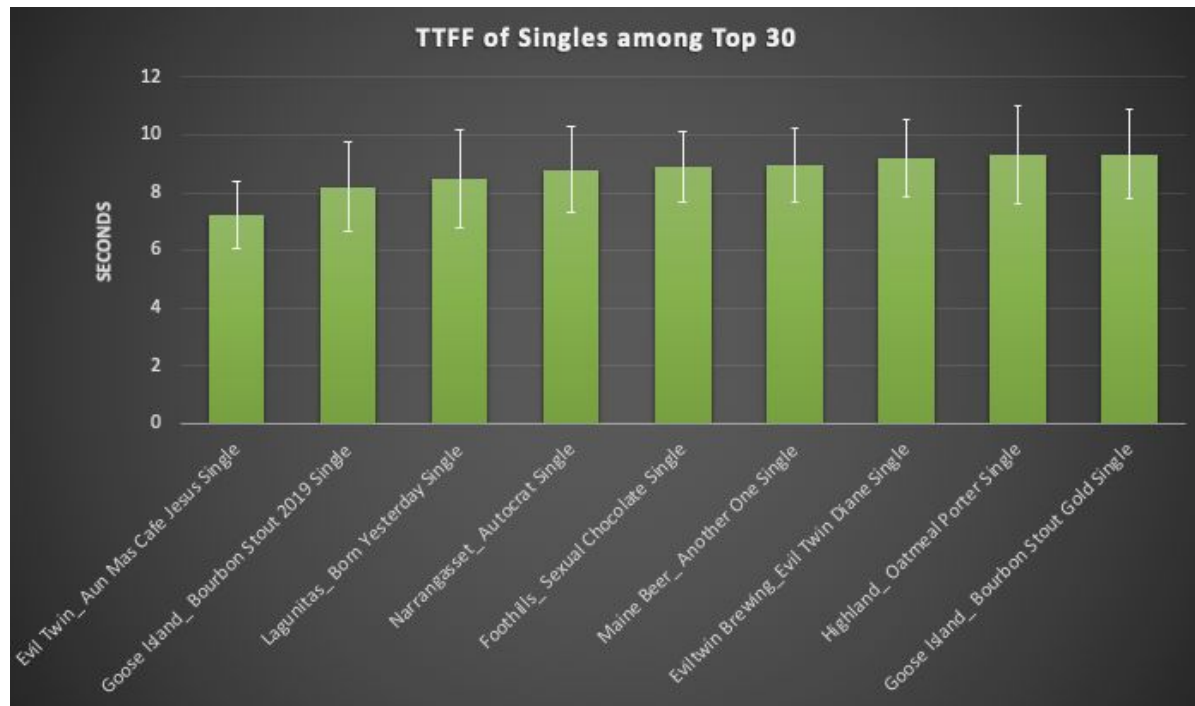
Design Trend

# TTFF Findings - Top 30

Lower numbers  
are better for  
this metric



# TTFF of Singles among Top 30



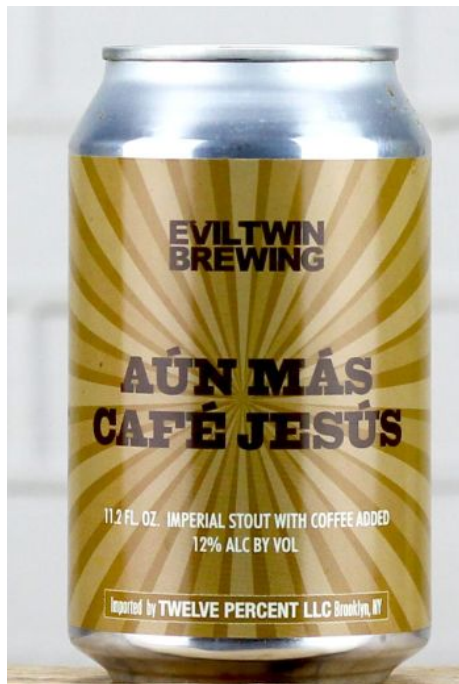
- Packs were seen much quicker than singles; Only the Evil Twin Single broke the top 15 overall SKUs in Time to Find
- Of this group, only the Autocrat Single shows up in the top SKUs purchased



# TTFF Singles- Top 1



Location on Left Shelf 3



Evil Twin\_Aun Mas Cafe Jesus

Gold

Small Can

Patterning

Design Trend

# TTFF Singles- Top 2



Location on Left Shelf 4



Goose Island\_ Bourbon Stout 2019 Single

Murdered Out

Minimalism

Design Trend

## TTFF Singles- Top 3

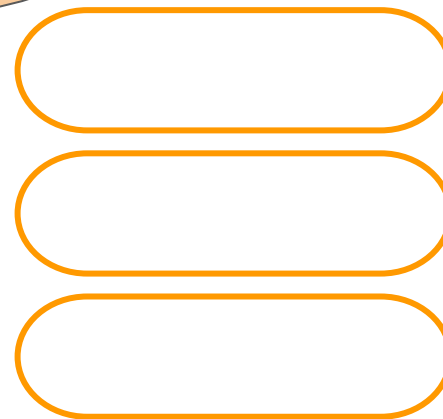


Location on Left Shelf 5



Lagunitas\_ Born Yesterday Single

*Interesting note: This was the only top shelf product (single or pack) to fall in the top 5 in any Eye Tracking metric*



Design Trend



# TTFF Singles- Top 4



Location on Left Shelf 3



Narrangasset\_ Autocrat Single

Slash Design  
Element

# TTFF Singles- Top 5



Location on Left Shelf 3



Foothills\_ Sexual Chocolate Single

*Interesting note: This was only one of two top-attention SKUs with zero purchases*

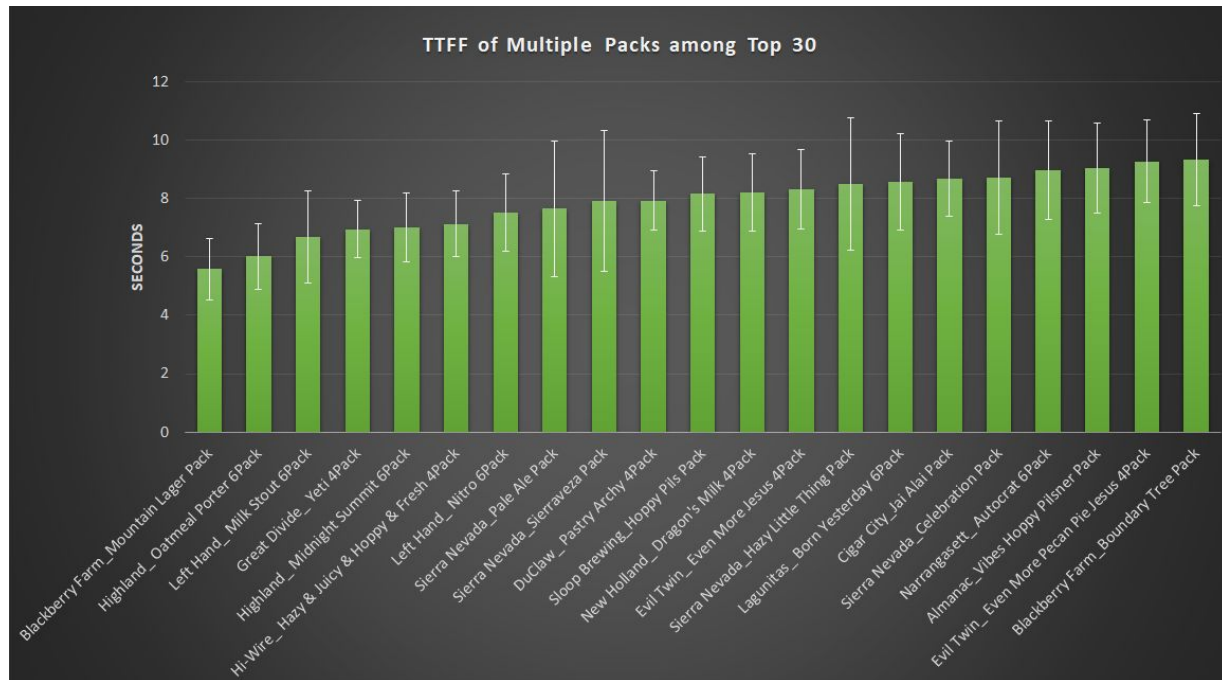
Gold/Shiny

Heavily illustrated

Minimal Branding

Design Trend

# TTFF of Multiple Packs among Top 30





# TTFF Multipacks- Top 1



Location on Cooler 3

*Interesting note: This was the only product in a cooler to fall in the top 5 in any Eye Tracking metric*



Blackberry Farm\_Mountain Lager Pack

White out

Minimal branding

Patterning

Pactech

Design Trend

# TTFF Multipacks- Top 2



Location on Left Shelf 4



Highland Brewing\_Oatmeal Porter 6Pack

Billboarding

Design Trend

# TTFF Multipack- Top 3



Location on Left Shelf 5



Left Hand\_Milk Stout 6Pack

Bifurcation (color to  
differentiate between  
sku)

Can Box

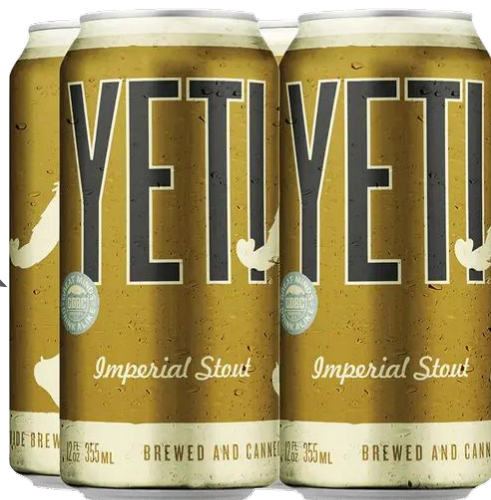
Design Trend



# TTFF Multipack- Top 4



Location on Left Shelf 4



Great Divide\_Yeti 4Pack

Gold

Minimal Branding

Minimal Design

Design Trend

# TTFF Multipack- Top 5



Location on Left Shelf 4



Highland\_Midnight Summit 6Pack

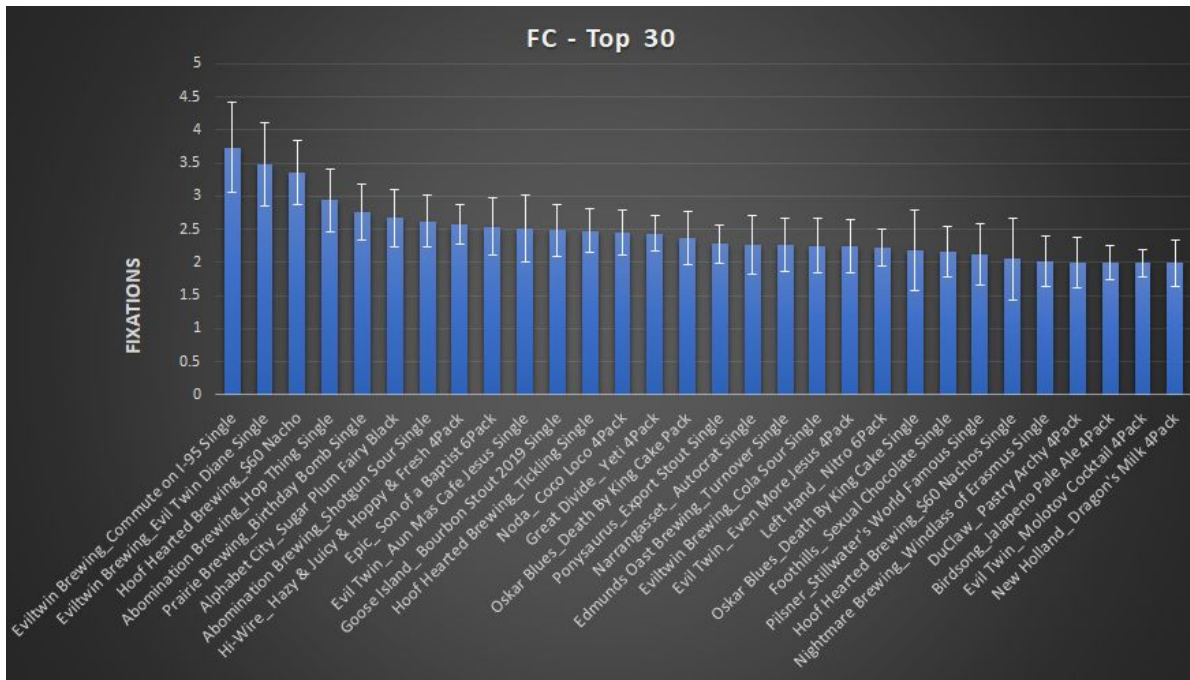
Can Box

Pattern?

Design Trend

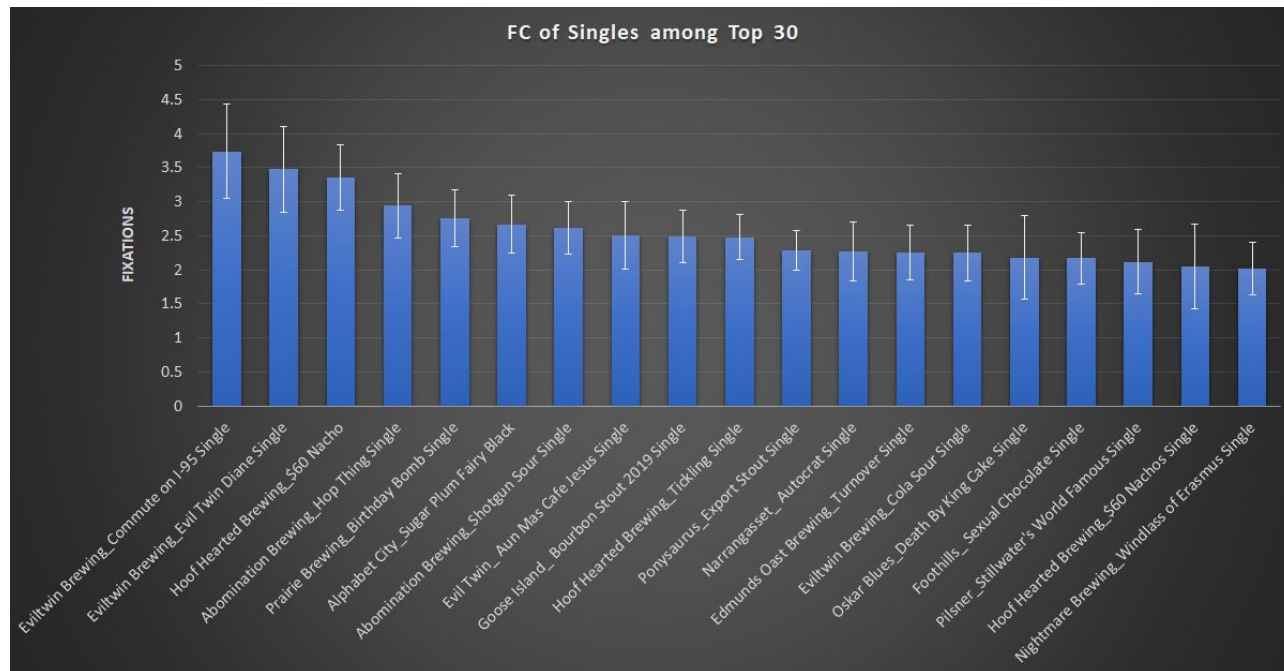
# FC Findings

Higher numbers  
are better for this  
metric





# FC of Singles among top 30



# FC Singles- Top 1



Location on Right Shelf 2



Eviltwin Brewing\_Commute on I-95 Single

Heavily illustrated

Minimal branding

Pressure sensitive?

Design Trend



# FC Singles- Top 2



Location on Right Shelf 2



EvilTwin Brewing\_Diane Single

Minimalism

Patterning

Pressure sensitive?

Design Trend



## FC Singles- Top 3



Location on Right Shelf 2



Hoof Hearted Brewing\_ \$60 Nacho

Heavily illustrated

Minimal branding

Pressure sensitive?

Design Trend





# FC Singles- Top 4



Location on Right Shelf 2



Abomination\_Hop Thing Single

Heavily illustrated

Minimal branding

Pressure sensitive?

Design Trend



# FC Singles- Top 5



Location on Right Shelf 1



Prairie Brewing\_Birthday Bomb Single

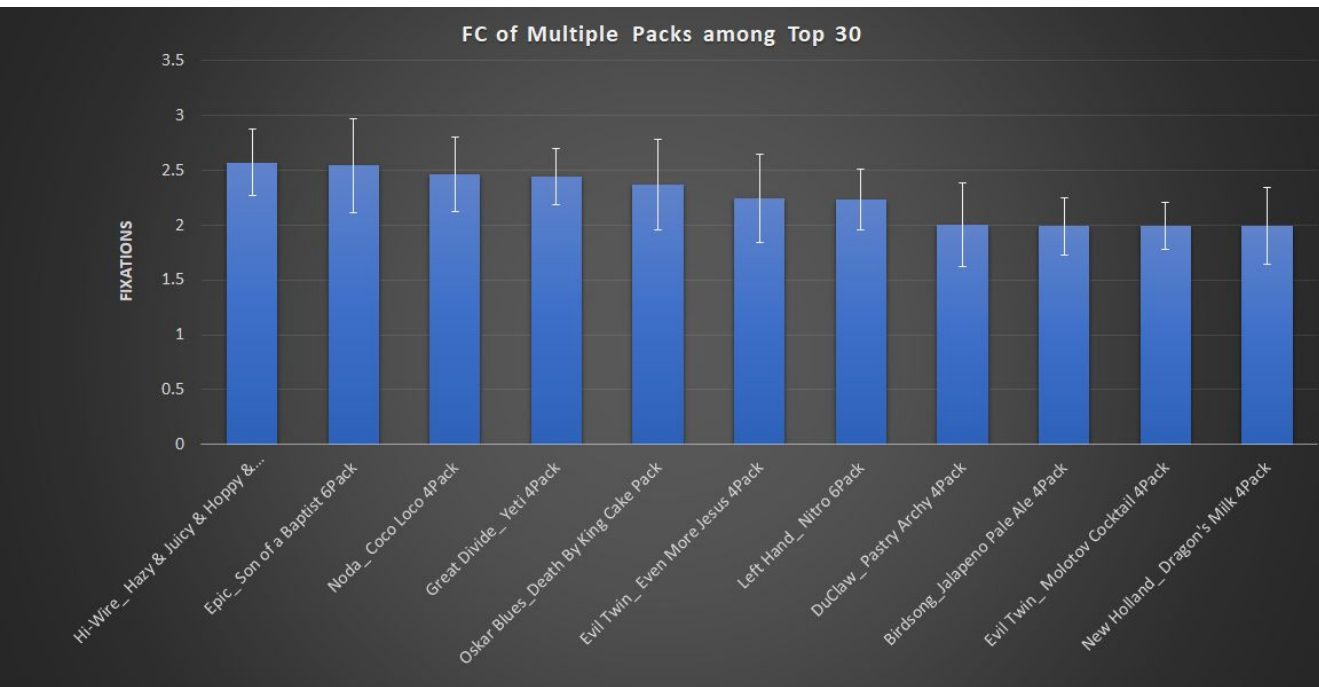
Heavily illustrated

Minimal branding

Max design

Design Trend

# FC of Multiple Packs among Top 30



# FC Packs- Top 1



Location on Left Shelf 4



Hi-Wire\_ Hazy & Juicy & Hoppy & Fresh 4Pack

White Out

Minimal branding

Pressure sensitive

Slash Design  
Element?

Design Trend



## FC Packs- Top 2



Location on Left Shelf 3



Epic\_ Son of a Baptist 6Pack

Small can

Paktech

Design Trend

## FC Packs- Top 3



Location on Left Shelf 5



Noda\_ Coco Loco 4Pack

Heavily illustrated

Paktech

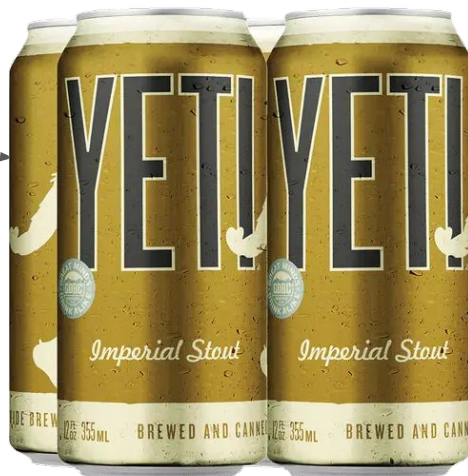
Shiny

Design Trend

## FC Packs- Top 4



Location on Left Shelf 3



Great Divide\_ Yeti 4Pack

Paktech

Gold

Minimal Design

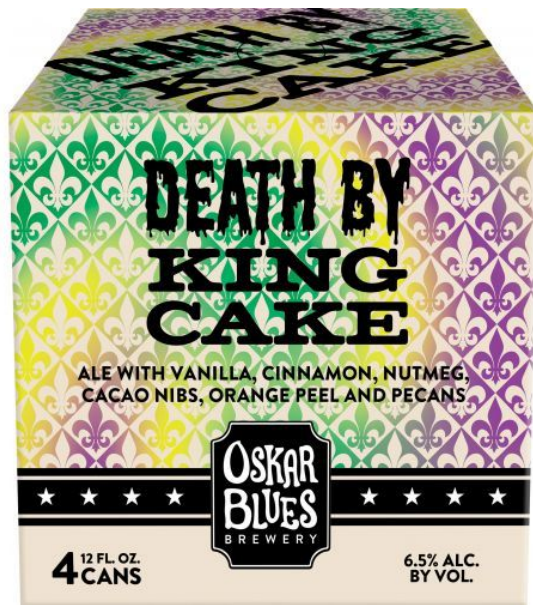
Design Trend



## FC Packs- Top 5



Location on Right Shelf 1



Oskar Blues\_Death By King Cake Pack

Patterned

Can Box

Billboarding

Design Trend





# Heat Maps



# Heat Map - Cooler 1-2-3





# Heat Map - Left Shelf 1-2-3



1

2



3

# Heat Map - Left Shelf 4-5



4



5



# Heat Map - Right Shelf 1-2-3



1



2



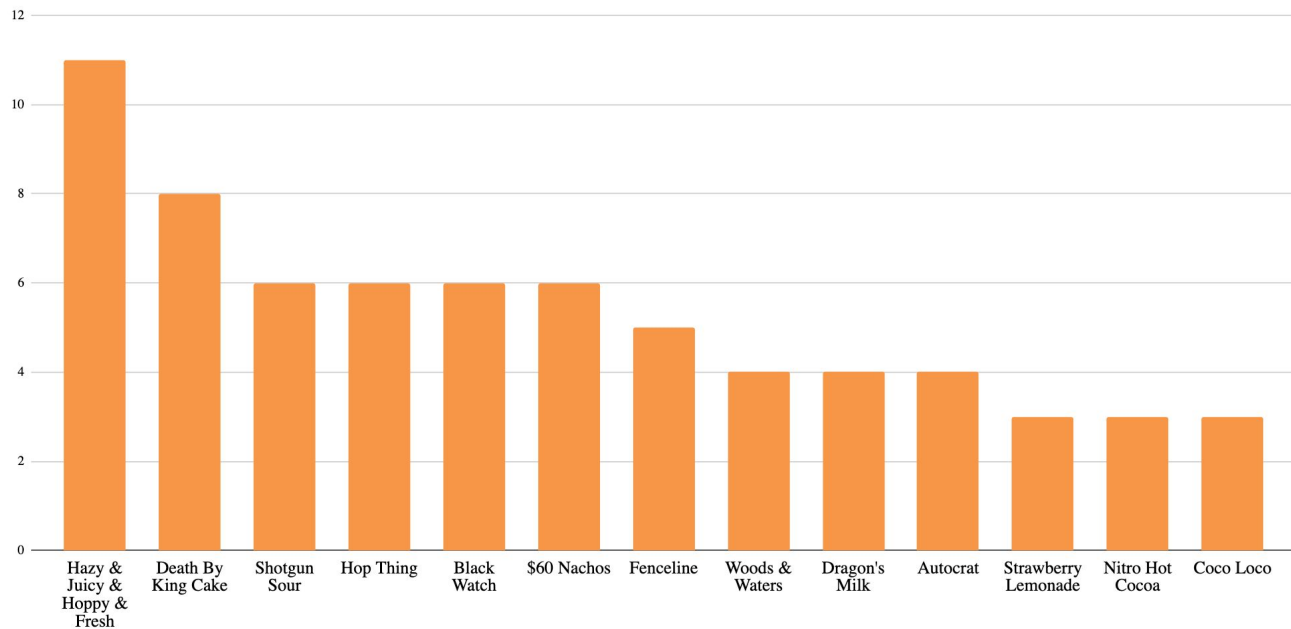
3



# Purchase Decisions

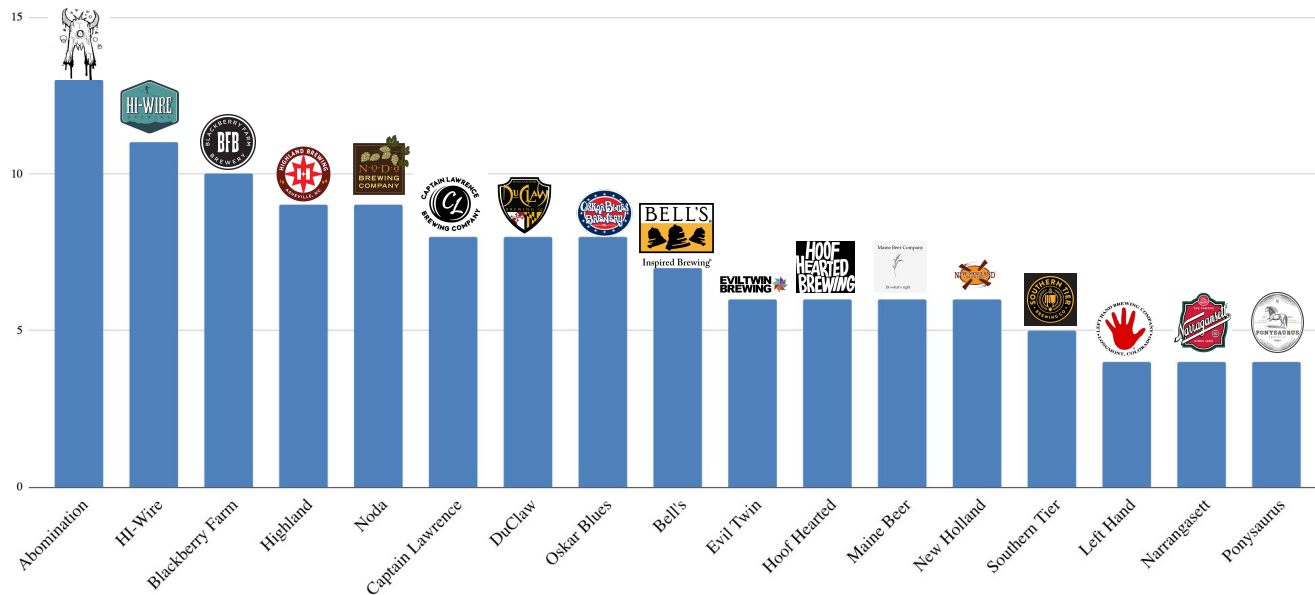


# Purchase Decision - Top Sellers



While this graph only represents the top sellers—those SKUs purchased 3+ times—81 other SKUs were purchased at least once.

# Purchase Decision - Brand Top Sellers



As with the SKUs, we've only represented the top selling brands here (those with 4+ purchases). But 52 different brands were purchased overall during the study



# Purchase Decision - SKU to Eye tracking

TOP	PURCHASE by SKU	TFD	FC	TTFF
1	Hazy & Juicy & Hoppy & Fresh	Hoof Hearted Brewing_ \$60 Nacho	Eviltwin Brewing_ Commute on I-95 Single	Blackberry Farm_ Mountain Lager Pack
2	Death By King Cake	Eviltwin Brewing_ Commute on I-95 Single	Eviltwin Brewing_ Evil Twin Diane Single	Highland_ Oatmeal Porter 6Pack
3	Shotgun Sour	Abomination Brewing_ Hop Thing Single	Hoof Hearted Brewing_ \$60 Nacho	Left Hand_ Milk Stout 6Pack
4	Hop Thing	Eviltwin Brewing_ Evil Twin Diane Single	Abomination Brewing_ Hop Thing Single	Great Divide_ Yeti 4Pack
5	Black Watch	Abomination Brewing_ Shotgun Sour Single	Prairie Brewing_ Birthday Bomb Single	Highland_ Midnight Summit 6Pack
6	\$60 Nachos	Hoof Hearted Brewing_ Tickling Single	Alphabet City_ Sugar Plum Fairy Black	Hi Wire_ Hazy & Juicy & Hoppy & Fresh 4Pack
7	Fenceline	Hi Wire_ Hazy & Juicy & Hoppy & Fresh 4Pack	Abomination Brewing_ Shotgun Sour Single	Evil Twin_ Aun Mas Cafe Jesus Single
8	Woods & Waters	Ponysaurus_ Export Stout Single	Hi Wire_ Hazy & Juicy & Hoppy & Fresh 4Pack	Left Hand_ Nitro 6Pack
9	Dragon's Milk	Alphabet City_ Sugar Plum Fairy Black	Epic_ Son of a Baptist 6Pack	Sierra Nevada_ Pale Ale Pack
10	Autocrat	Epic_ Son of a Baptist 6Pack	Evil Twin_ Aun Mas Cafe Jesus Single	Sierra Nevada_ Sierraveza Pack
11	Strawberry Lemonade	Hi Wire_ Hazy & Juicy & Hoppy & Fresh Single	Goose Island_ Bourbon Stout 2019 Single	DuClaw_ Pastry Archy 4Pack
12	Nitro Hot Cocoa	Oskar Blues_ Death By King Cake Single	Hoof Hearted Brewing_ Tickling Single	Sloop Brewing_ Hoppy Pils Pack
13	Coco Loco	Narragasset_ Autocrat Single	Noda_ Coco Loco 4Pack	New Holland_ Dragon's Milk 4Pack
14		Pilsner_ Stillwater's World Famous Single	Great Divide_ Yeti 4Pack	Goose Island_ Bourbon Stout 2019 Single
15		Eviltwin Brewing_ Cola Sour Single	Oskar Blues_ Death By King Cake Pack	Evil Twin_ Even More Jesus 4Pack
16		Edmunds Oast Brewing_ Turnover Single	Ponysaurus_ Export Stout Single	Sierra Nevada_ Hazy Little Thing Pack
17		PonySaurus Brewing_ Don't Be Mean to People Single	Narragasset_ Autocrat Single	Lagunitas_ Born Yesterday Single
18		Prairie Brewing_ Birthday Bomb Single	Edmunds Oast Brewing_ Turnover Single	Lagunitas_ Born Yesterday 6Pack
19		Hoof Hearted Brewing_ \$60 Nachos Single	Eviltwin Brewing_ Cola Sour Single	Cigar City_ Jai Alai Pack
20		Noda_ Coco Loco 4Pack	Evil Twin_ Even More Jesus 4Pack	Sierra Nevada_ Celebration Pack
21		Goose Island_ Bourbon Stout 2019 Single	Left Hand_ Nitro 6Pack	Narragasset_ Autocrat Single
22		Oskar Blues_ Death By King Cake Pack	Oskar Blues_ Death By King Cake Single	Foothills_ Sexual Chocolate Single
23		DuClaw_ Pastry Archy 4Pack	Foothills_ Sexual Chocolate Single	Maine Beer_ Another One Single
24		Syamonre_ Sticky Crystals Pack	Pilsner_ Stillwater's World Famous Single	Narragasset_ Autocrat 6Pack
25		Sycamore_ Strawberry Lemonade Single	Hoof Hearted Brewing_ \$60 Nachos Single	Almanac_ Vibes Hoppy Pilsner Pack
26		Nightmare Brewing_ Windlass of Erasmus Single	Nightmare Brewing_ Windlass of Erasmus Single	Eviltwin Brewing_ Evil Twin Diane Single
27		Stillwater Artisanal_ Recess Single	DuClaw_ Pastry Archy 4Pack	Evil Twin_ Even More Pecan Pie Jesus 4Pack
28		Left Hand_ Nitro 6Pack	Birdsong_ Jalapeno Pale Ale 4Pack	Highland_ Oatmeal Porter Single
29		Maine Beer_ Another One Single	Evil Twin_ Molotov Cocktail 4Pack	Goose Island_ Bourbon Stout Gold Single
30		Evil Twin_ Aun Mas Cafe Jesus Single	New Holland_ Dragon's Milk 4Pack	Blackberry Farm_ Boundary Tree Pack

# Purchase Decision - Brand to Eye tracking

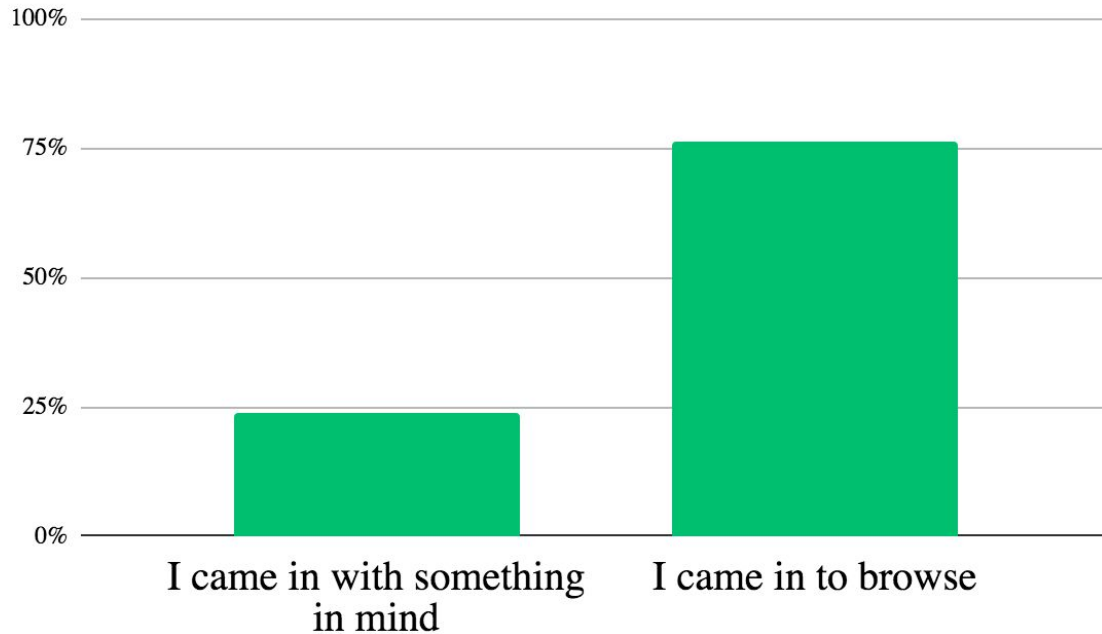
TOP	PURCHASE BY BRAND	TFD	FC	TTFF
1	Abomination	Hoof Hearted Brewing_ \$60 Nacho	Eviltwin Brewing_ Commute on I-95 Single	Blackberry Farm_ Mountain Lager Pack
2	Hi-Wire	Eviltwin Brewing_ Commute on I-95 Single	Eviltwin Brewing_ Evil Twin Diane Single	Highland_ Oatmeal Porter 6Pack
3	Blackberry Farm	Abomination Brewing_ Hop Thing Single	Hoof Hearted Brewing_ \$60 Nacho	Left Hand_ Milk Stout 6Pack
4	Highland	Eviltwin Brewing_ Evil Twin Diane Single	Abomination Brewing_ Hop Thing Single	Great Divide_ Yeti 4Pack
5	Noda	Abomination Brewing_ Shotgun Sour Single	Prairie Brewing_ Birthday Bomb Single	Highland_ Midnight Summit 6Pack
6	Captain Lawrence	Hoof Hearted Brewing_ Tickling Single	Alphabet City_ Sugar Plum Fairy Black	Hi-Wire_ Hazy & Juicy & Hoppy & Fresg 4Pack
7	DuClaw	Hi-Wire_ Hazy & Juicy & Hoppy & Fresh 4Pack	Abomination Brewing_ Shotgun Sour Single	Evil Twin_ Aun Mas Cafe Jesus Single
8	Oskar Blues	Ponysaurus_ Export Stout Single	Hi-Wire_ Hazy & Juicy & Hoppy & Fresg 4Pack	Left Hand_ Nitro 6Pack
9	Bell's	Alphabet City_ Sugar Plum Fairy Black	Epic_ Son of a Baptist 6Pack	Sierra Nevada_ Pale Ale Pack
10	Evil Twin	Epic_ Son of a Baptist 6Pack	Evil Twin_ Aun Mas Cafe Jesus Single	Sierra Nevada_ Sierraveza Pack
11	Hoof Hearted	Hi-Wire_ Hazy & Juicy & Hoppy & Fresh Single	Goose Island_ Bourbon Stout 2019 Single	DuClaw_ Pastry Archy 4Pack
12	Maine Beer	Oskar Blues_ Death By King Cake Single	Hoof Hearted Brewing_ Tickling Single	Sloop Brewing_ Hoppy Pils Pack
13	New Holland	Narrangasset_ Autocrat Single	Noda_ Coco Loco 4Pack	New Holland_ Dragon's Milk 4Pack
14	Southern Tier	Pilsner_ Stillwater's World Famous Single	Great Divide_ Yeti 4Pack	Goose Island_ Bourbon Stout 2019 Single
15	Left Hand	Eviltwin Brewing_ Cola Sour Single	Oskar Blues_ Death By King Cake Pack	Evil Twin_ Even More Jesus 4Pack
16	Narrangasset	Edmunds Oast Brewing_ Turnover Single	Ponysaurus_ Export Stout Single	Sierra Nevada_ Hazy Little Thing Pack
17	Ponysaurus	PonySaurus Brewing_ Don't Be Mean to People Single	Narrangasset_ Autocrat Single	Lagunitas_ Born Yesterday Single
18		Prairie Brewing_ Birthday Bomb Single	Edmunds Oast Brewing_ Turnover Single	Lagunitas_ Born Yesterday 6Pack
19		Hoof Hearted Brewing_ \$60 Nachos Single	Eviltwin Brewing_ Cola Sour Single	Cigar City_ Jai Alai Pack
20		Noda_ Coco Loco 4Pack	Evil Twin_ Even More Jesus 4Pack	Sierra Nevada_ Celebration Pack
21		Goose Island_ Bourbon Stout 2019 Single	Left Hand_ Nitro 6Pack	Narrangasset_ Autocrat Single
22		Oskar Blues_ Death By King Cake Pack	Oskar Blues_ Death By King Cake Single	Foothills_ Sexual Chocolate Single
23		DuClaw_ Pastry Archy 4Pack	Foothills_ Sexual Chocolate Single	Maine Beer_ Another One Single
24		Syamonre_ Sticky Crystals Pack	Pilsner_ Stillwater's World Famous Single	Narrangasset_ Autocrat 6Pack
25		Sycamore_ Strawberry Lemonade Single	Hoof Hearted Brewing_ \$60 Nachos Single	Almanac_ Vibes Hoppy Pilsner Pack
26		Nightmare Brewing_ Windlass of Erasmus Single	Nightmare Brewing_ Windlass of Erasmus Single	Eviltwin Brewing_ Evil Twin Diane Single
27		Stillwater Artisanal_ Recess Single	DuClaw_ Pastry Archy 4Pack	Evil Twin_ Even More Pecan Pie Jesus 4Pack
28		Left Hand_ Nitro 6Pack	Birdsong_ Jalapeno Pale Ale 4Pack	Highland_ Oatmeal Porter Single
29		Maine Beer_ Another One Single	Evil Twin_ Molotov Cocktail 4Pack	Goose Island_ Bourbon Stout Gold Single
30		Evil Twin_ Aun Mas Cafe Jesus Single	New Holland_ Dragon's Milk 4Pack	Blackberry Farm_ Boundary Tree Pack



# Survey Responses

# Survey Responses

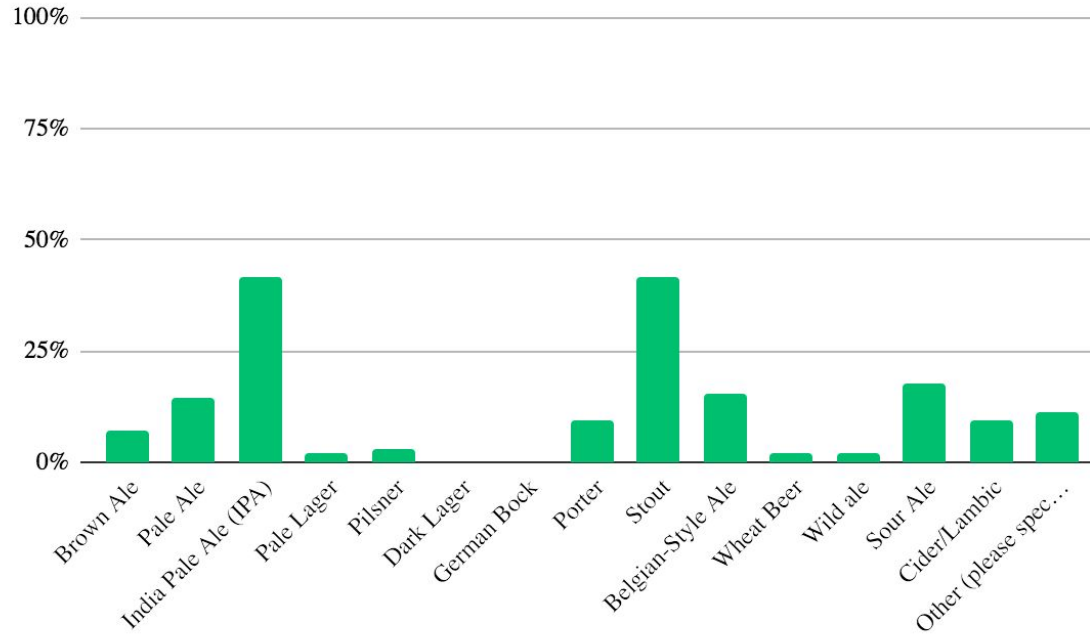
Did you have an idea of what craft beer you wanted to purchase before coming here today or did you come to browse?





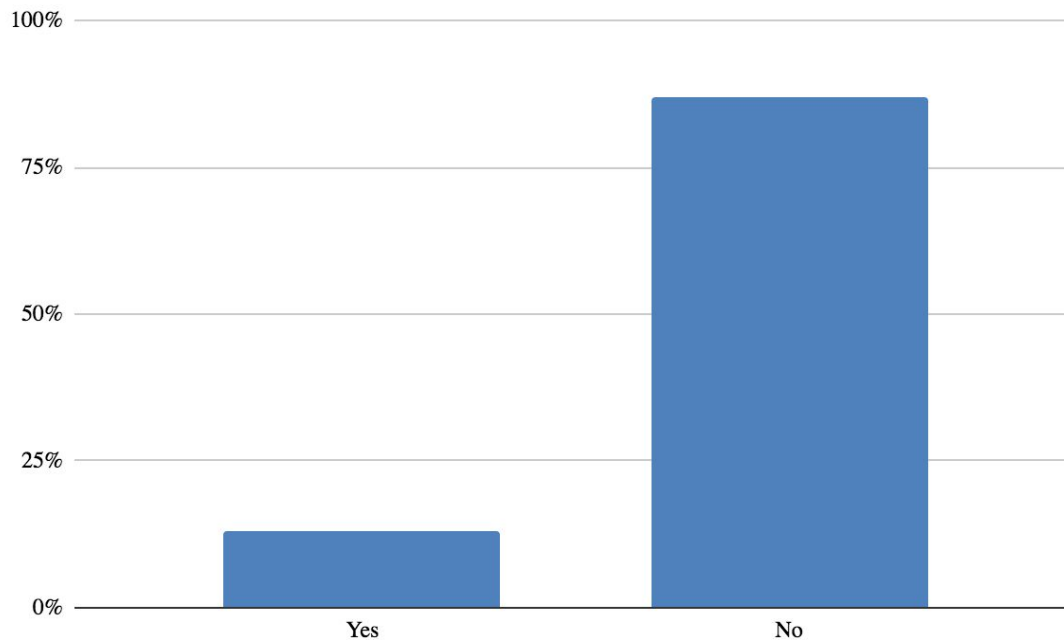
# Survey Responses

Which category(s) best describe the beer types you purchased today? (If you chose two different types of beer, indicate both types)



# Survey Responses

Have you purchased this craft beer before?



# Survey Results

*The logo was eye catching and I love coconut in dark beers*

*I liked the minimalist style of the can*

*The design drew me in, but the style seemed interesting*

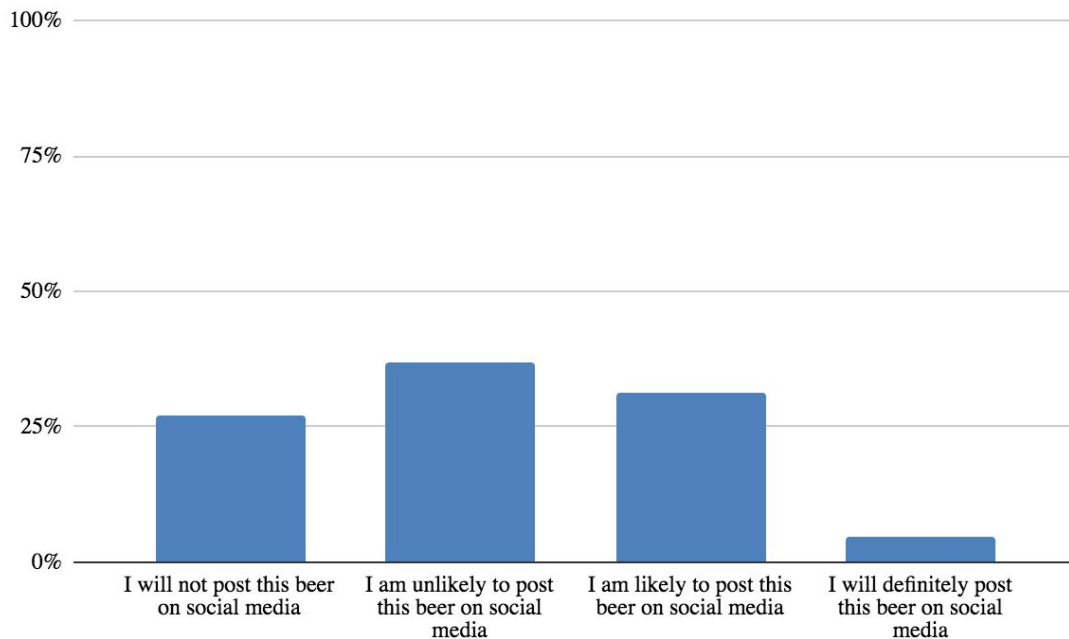
*I like gose style and fruity beers. I also liked the design of the can and size*

*The packaging explained it very well. Several others had too much design with no explanation of the beer*



# Survey Responses

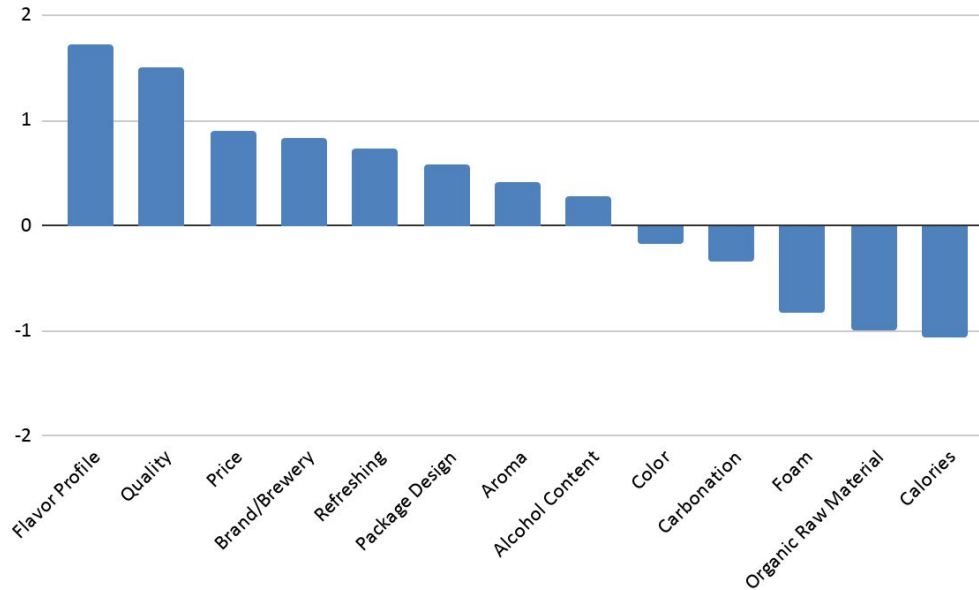
How likely are you to post about this craft beer or post a photo of the package on social media?





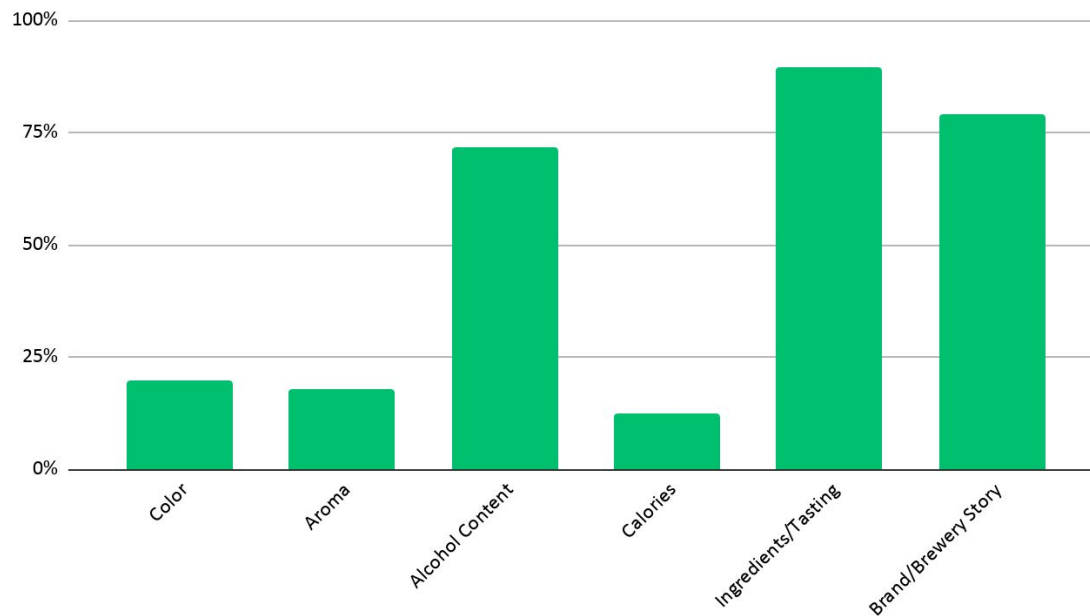
# Survey Responses

The following is a list of attributes and characteristics of craft beer. When you are considering a purchase, how important are these attributes to your decision? Please rank each attribute from 1-4 where 1 is Not Important at All and 4 is Very Important to your decision-making.



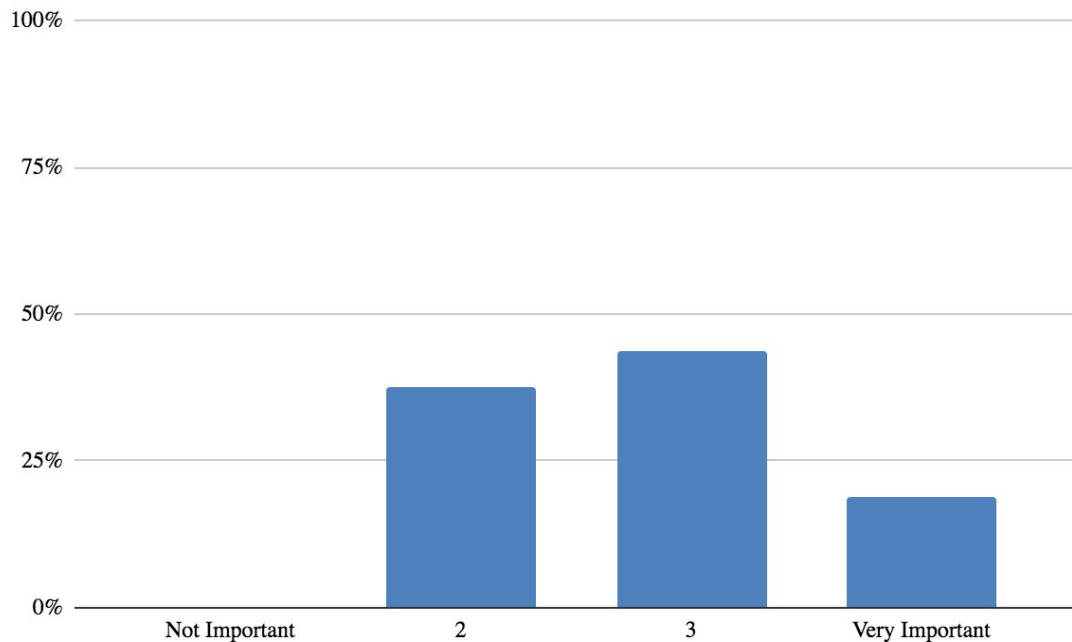
# Survey Responses

What information do you expect to obtain from a craft beer package to help you decide which beer to purchase? (Check all that apply)



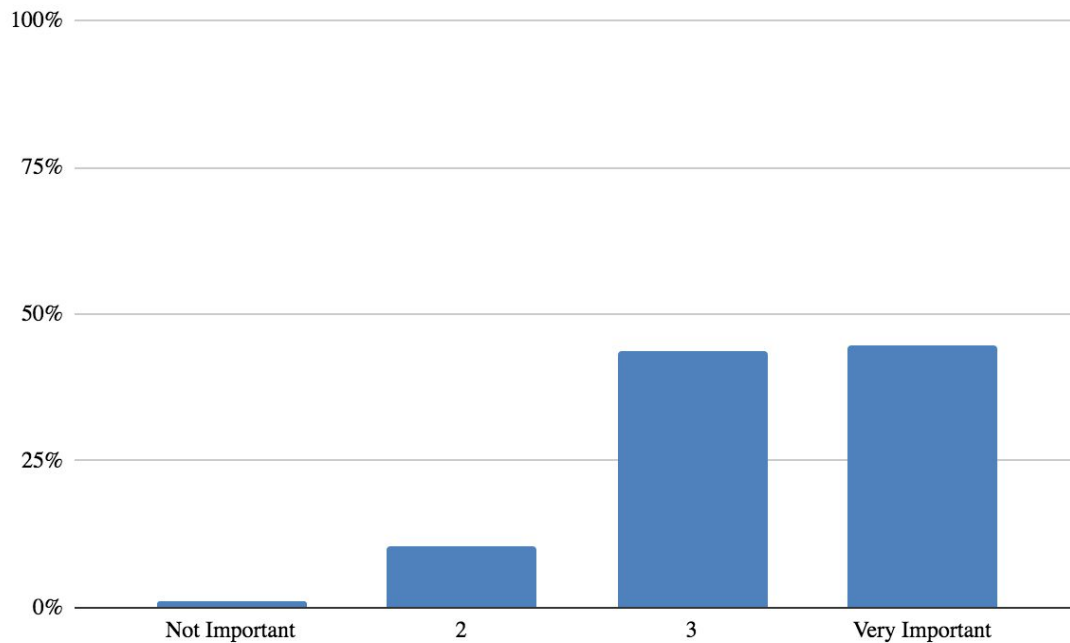
# Survey Responses

How significantly does price influence your purchase decision when you shop for craft beer?



# Survey Responses

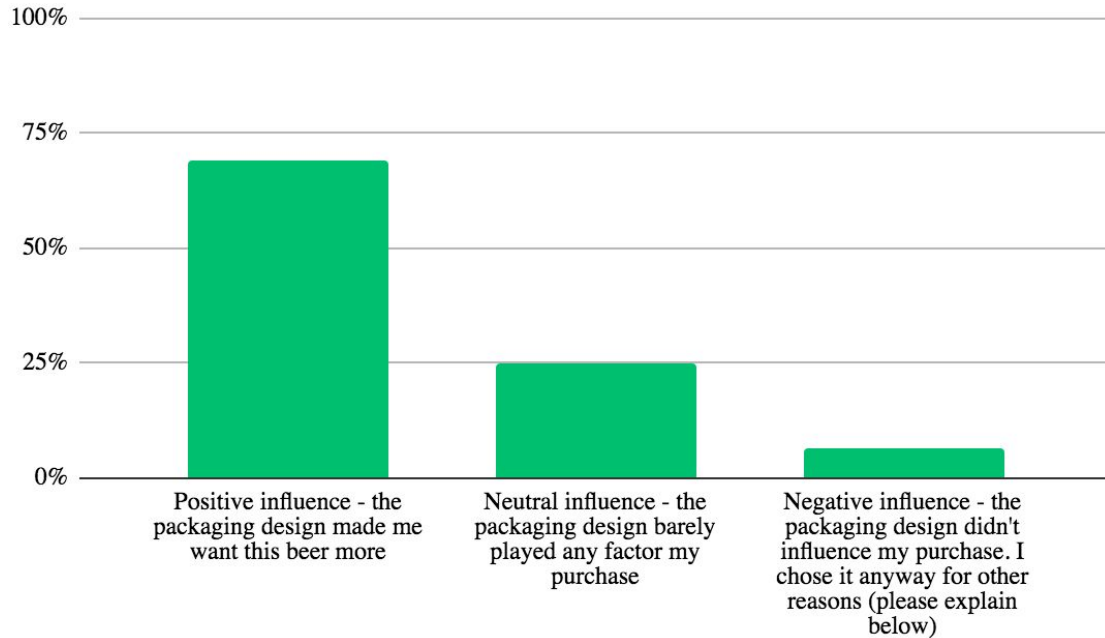
How important do you think packaging design is in craft beer marketing?





# Survey Responses

How do you feel the packaging design influenced your choice of purchase today?



# Survey Results

*I am less likely to choose beers with wild illustrations/packaging if they don't seem to match the description of what's inside.*

*I did like the Jalapeno Pale Ale package and it influenced my decision positively but I chose the Shotgun Sour even though I did not like the packaging.*

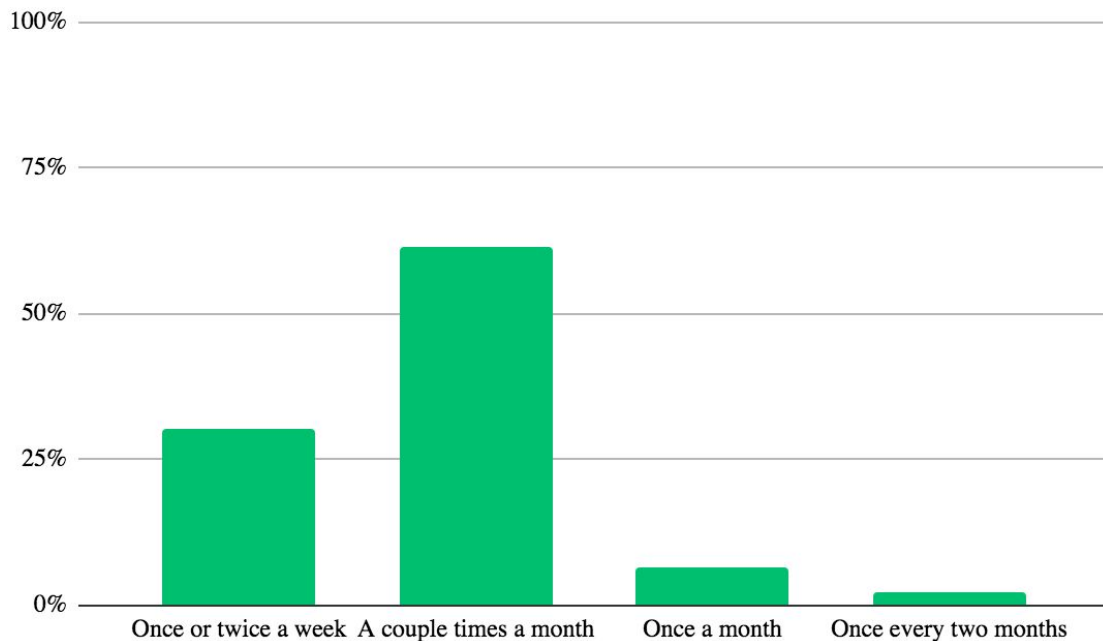
***Packaging design makes it more fun to select a beer. It also helps me remember the beer if I want to buy it next time.***

*Both beers had very eye catching design and were very colorful. They stood out over basic designed cans*



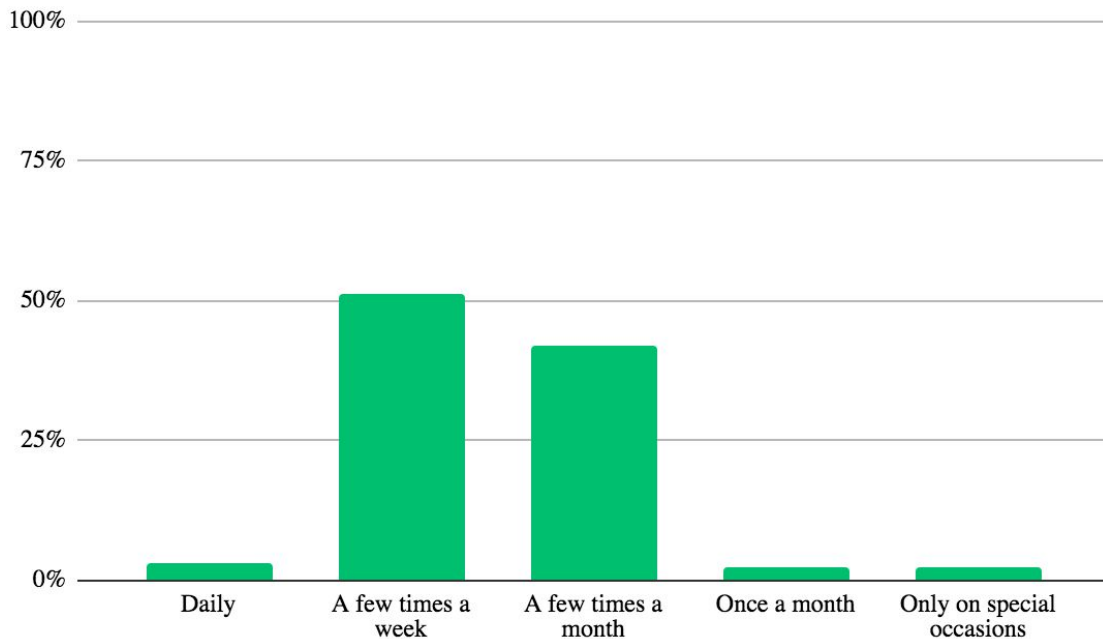
# Survey Responses

How often do you purchase craft beer?



# Survey Responses

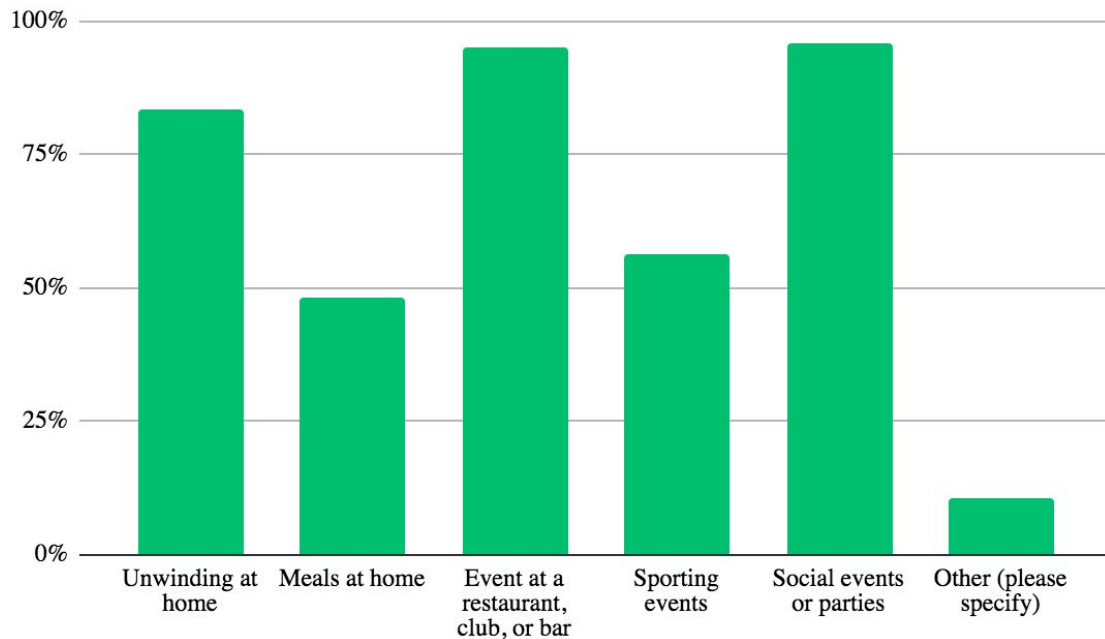
What is your frequency of craft beer consumption?





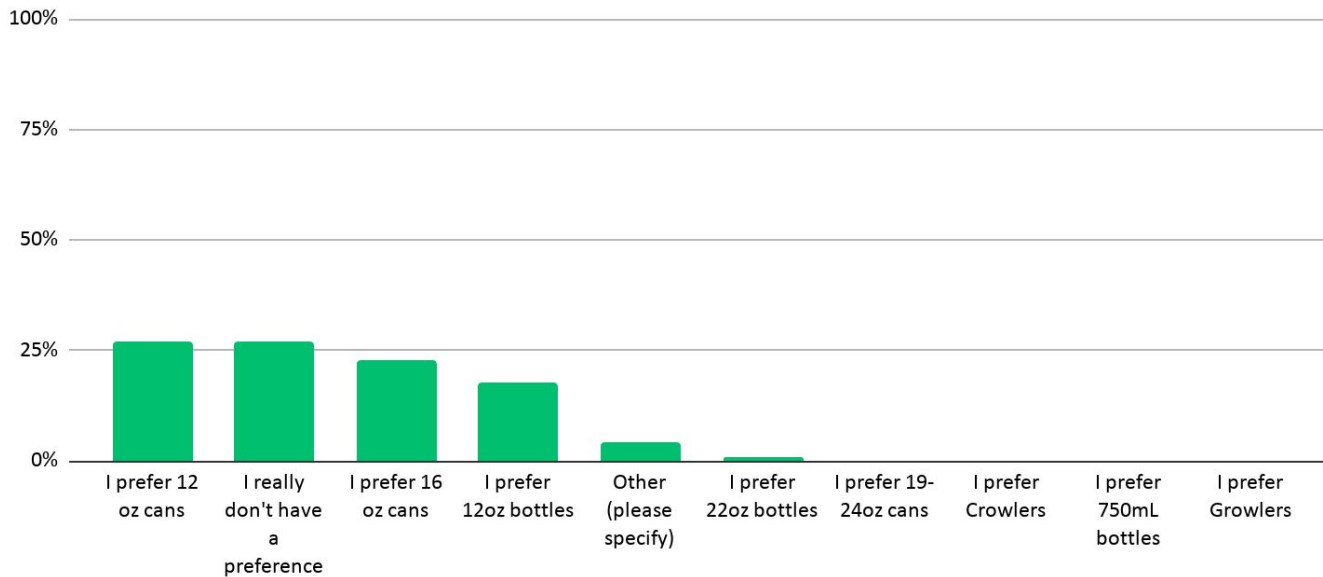
# Survey Responses

What are the occasions where you usually consume craft beer? Check any that apply



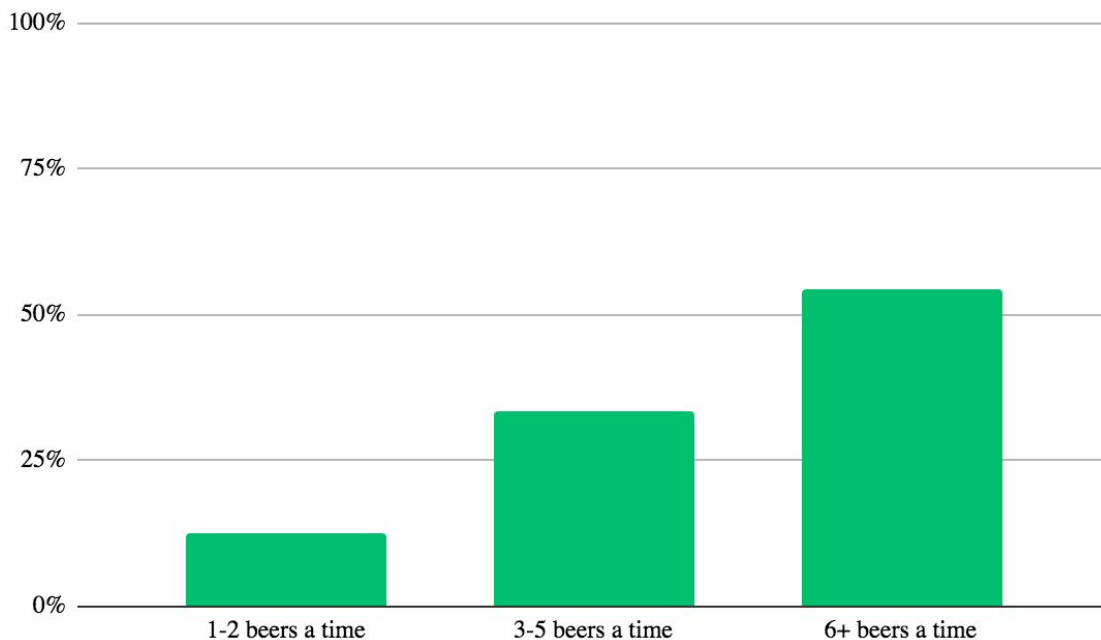
# Survey Responses

Do you have a preference of packaging type for craft beer?



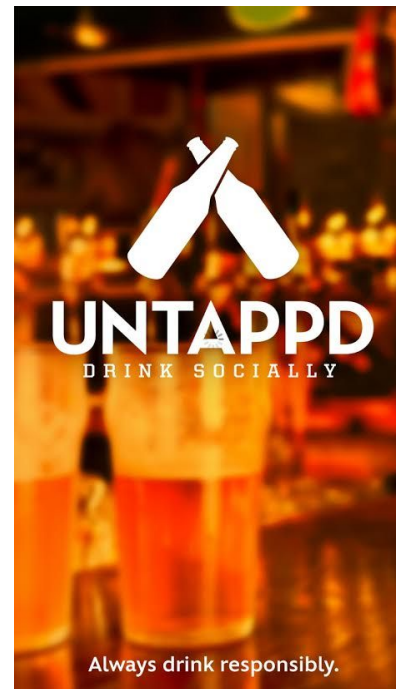
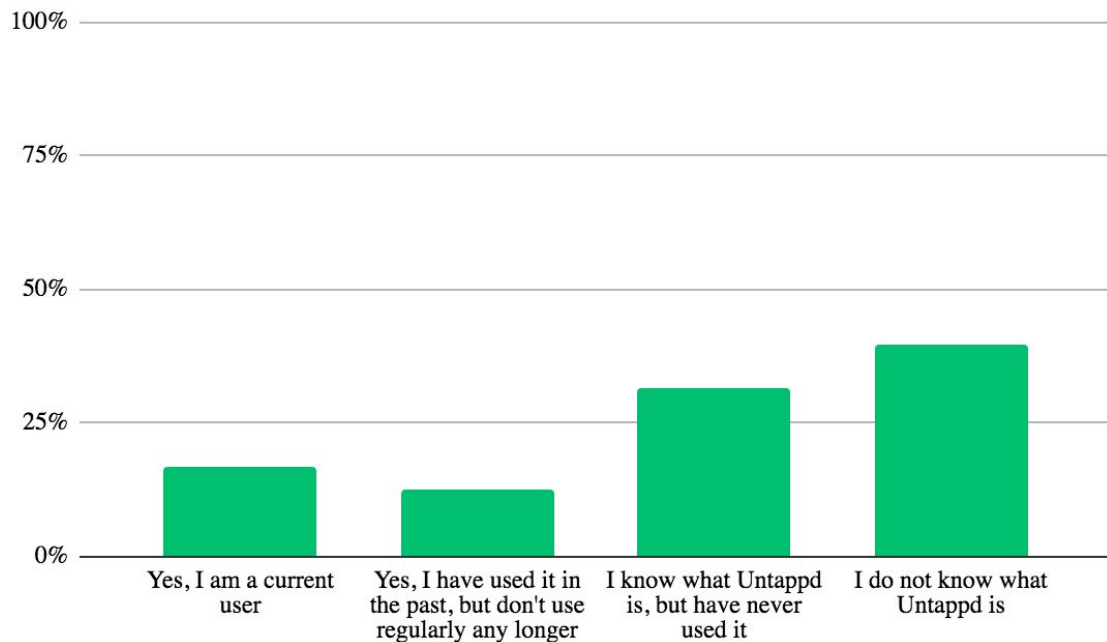
# Survey Responses

How many beers do you usually purchase at one time when you are buying craft beer to drink elsewhere?



# Survey Responses

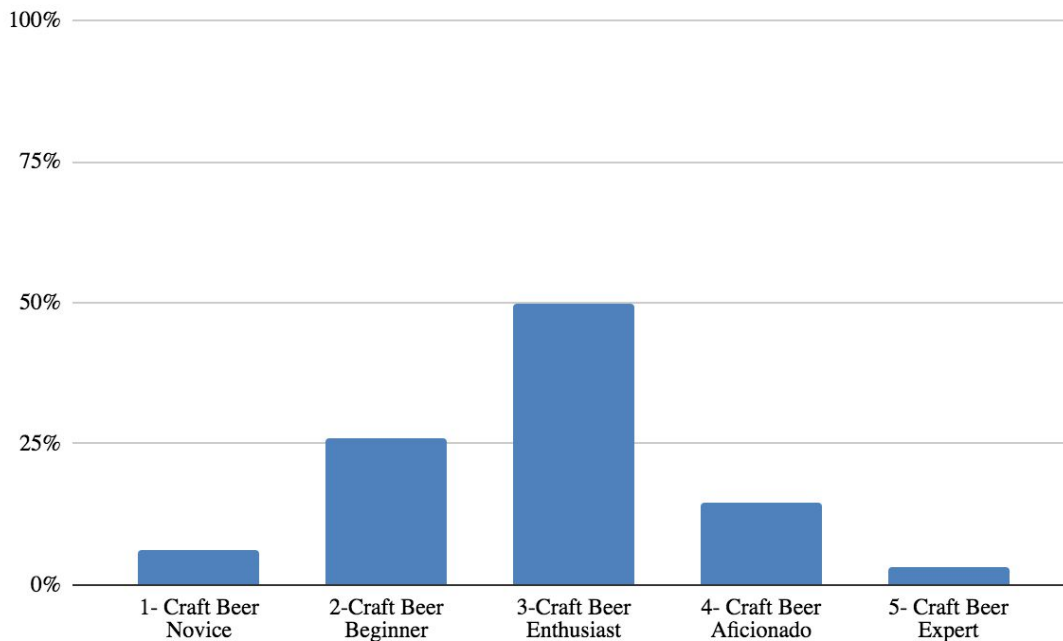
Are you a user of Untappd?





# Survey Responses

How would evaluate your level of craft beer knowledge?





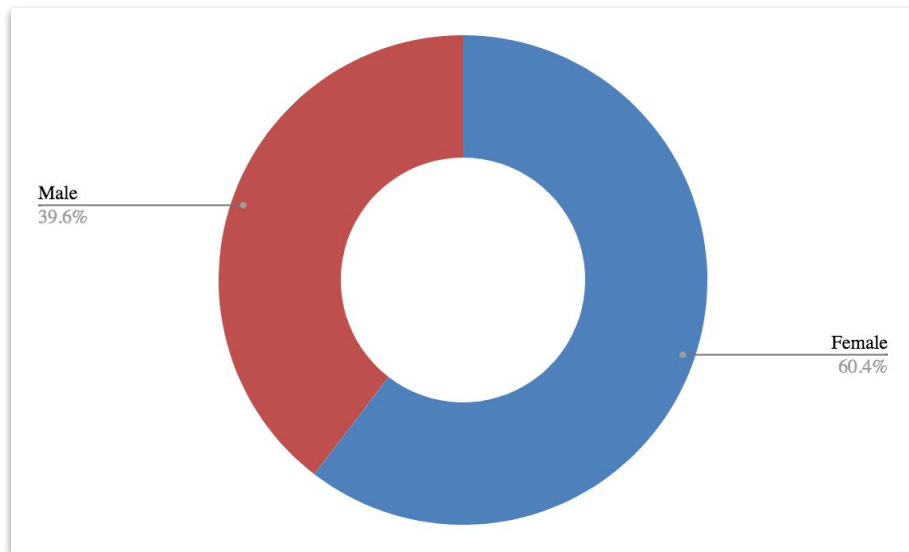
# Demographics



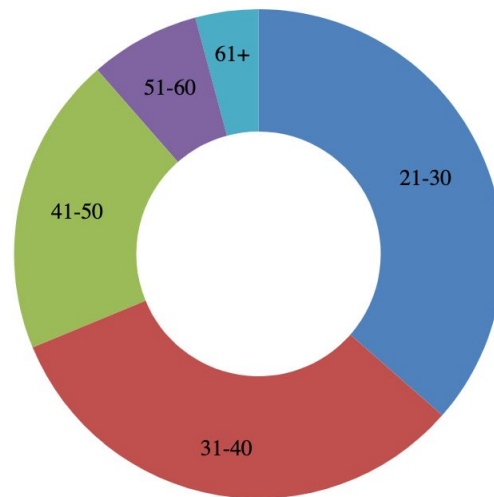
# Demographics

Participants were screened based on age and shopping habits. The profiles meet an accepted shopper profile for this biometric research for primary or shared shopping responsibility for a U.S. household (71/29 female/male and broad income, education, employment, age, and other household influences).

GENDER

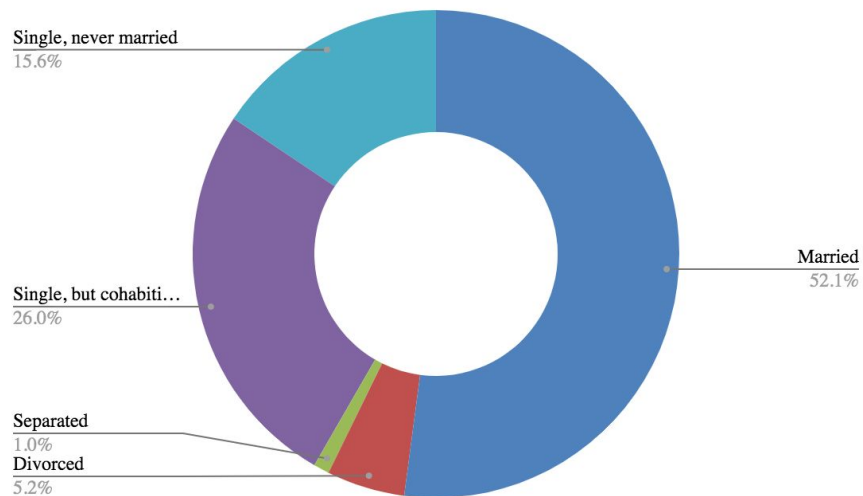


AGE

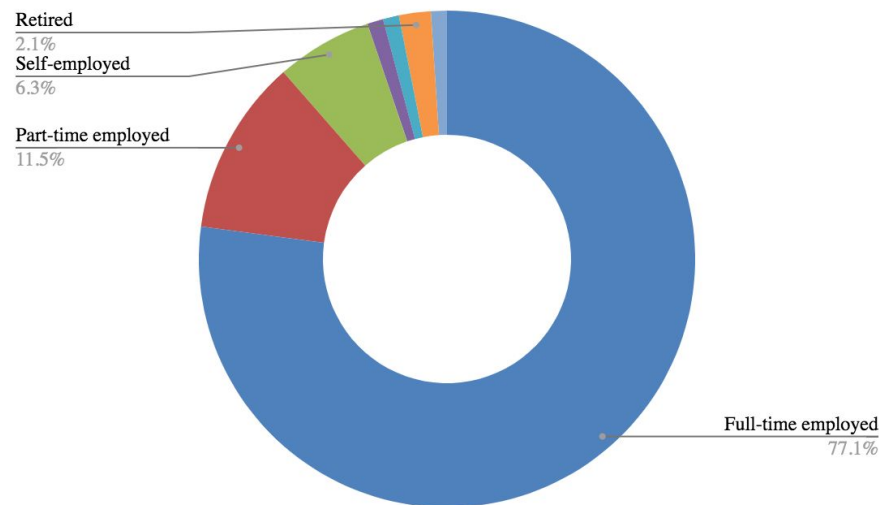


# Demographics

## Relationship Status



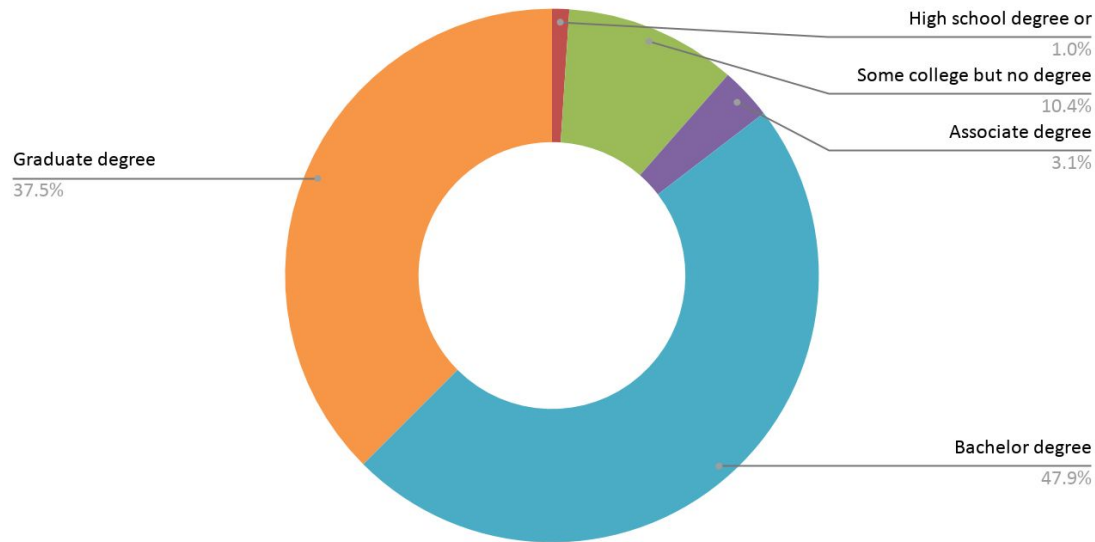
## Professional Status





# Demographics

## EDUCATION





# Eye Tracking Overview

# Hardware - Mobile Eye Tracking Glasses



# What Is Eye Tracking?

## Eye Tracking Overview

- ❑ Eye tracking is a term describing the techniques used to measure a person's point of gaze, providing insight into what draws in an observer's attention and cognitive processes.
- ❑ The technology follows the eye of the subject, tracking their exact eye movements while looking at an object or area, and identifying precisely where a person looks.
- ❑ Even though the subject may not be aware of how their gaze moves about and focuses on different areas, a researcher can collect eye tracking information and form opinions about different areas of interest on an object—specifically, a package.
- ❑ Packaging designers may aggregate data to show which areas of the package attract the most attention and, equally as important, where attention is void.



# Eye Tracking Metrics

## Eye Tracking Overview

- ❑ Purchase Decision (PD)
  - Measures how many participants chose to buy the item. The higher the number, the better the package performed.
- ❑ Total Fixation Duration (TFD)
  - The time, in seconds, spent on average by participants fixating on this item. The higher the number, the better the package performed.
- ❑ Time To First Fixation (TTFF)
  - The time, in seconds, from when a product first enters a participant's field of view until they fixate on it. The lower the number, the better the package performed.
- ❑ Fixation Count (FC)
  - The total number of times a participant's scan of the planogram crossed into a particular area of interest.