

INSIGHTS & ANALYSIS

Shifting Demographics Among Craft Drinkers



By [Bart Watson](#) 
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What are the demographics of craft lovers and how have those changed in recent years? As craft beer has grown, the total population of craft drinkers has certainly grown too, but has it diversified? How? Where?

Before we delve into these questions, remember that how we define our scope of inquiry shifts the answers we get. Is a craft drinker someone who drinks craft a few times a year? Someone who drinks it weekly? There isn’t a single correct answer. Similarly, although I’m going to talk in terms of national demographics, state or local demographics are going to vary a lot, both based on the population demographics in those places, and the particular craft culture that has emerged locally. I’ll highlight some of these variations as we get deeper into the analysis, but I want to be clear up front that there isn’t a single correct lens to examine these questions. Finally, any time you are working with demographic data, particularly on race/ethnicity, it is worth remembering that many of the categories we use are constructs – perhaps useful ones – but other than age, demographic categories aren’t always clean and often rely on self-identification data.

Overall Craft Drinker Demographics

Let’s start really broadly. If we use “at least several times a year” as our standard, around 40% of the 21+ population is now a craft drinker (source: Nielsen – Harris on Demand). That’s been going up about one to two percentage points a year. The U.S. 21+ population has been going up by ~2.5M legal drinking age adults in recent years, so that means craft is getting a slightly bigger bump than that every year (since the category gets ~40% of those new 2.5M + 1-2% more of the total ~240M drinkers). That’s likely averaged around 4-5 million new craft drinkers a year using a “several times a year” drinker definition.

PERCENTAGE OF CRAFT BEER DRINKERS (SEVERAL TIMES A YEAR OR MORE OFTEN) AMONG 21+ POP

2015	2016	2017	2018
35%	37%	38%	40%

Source: Percentages are based on several waves of data from surveys fielded online by The Harris Poll between 2015 and 2018

If we look at more frequent craft consumption, not surprisingly, the numbers drop. Scarborough (another division of Nielsen) estimated that in 2017, 7.3% of 21+ adults had been a craft drinker in the last month. That’s about 17.5M people in craft’s core.

Gender and Craft Drinker Demographics

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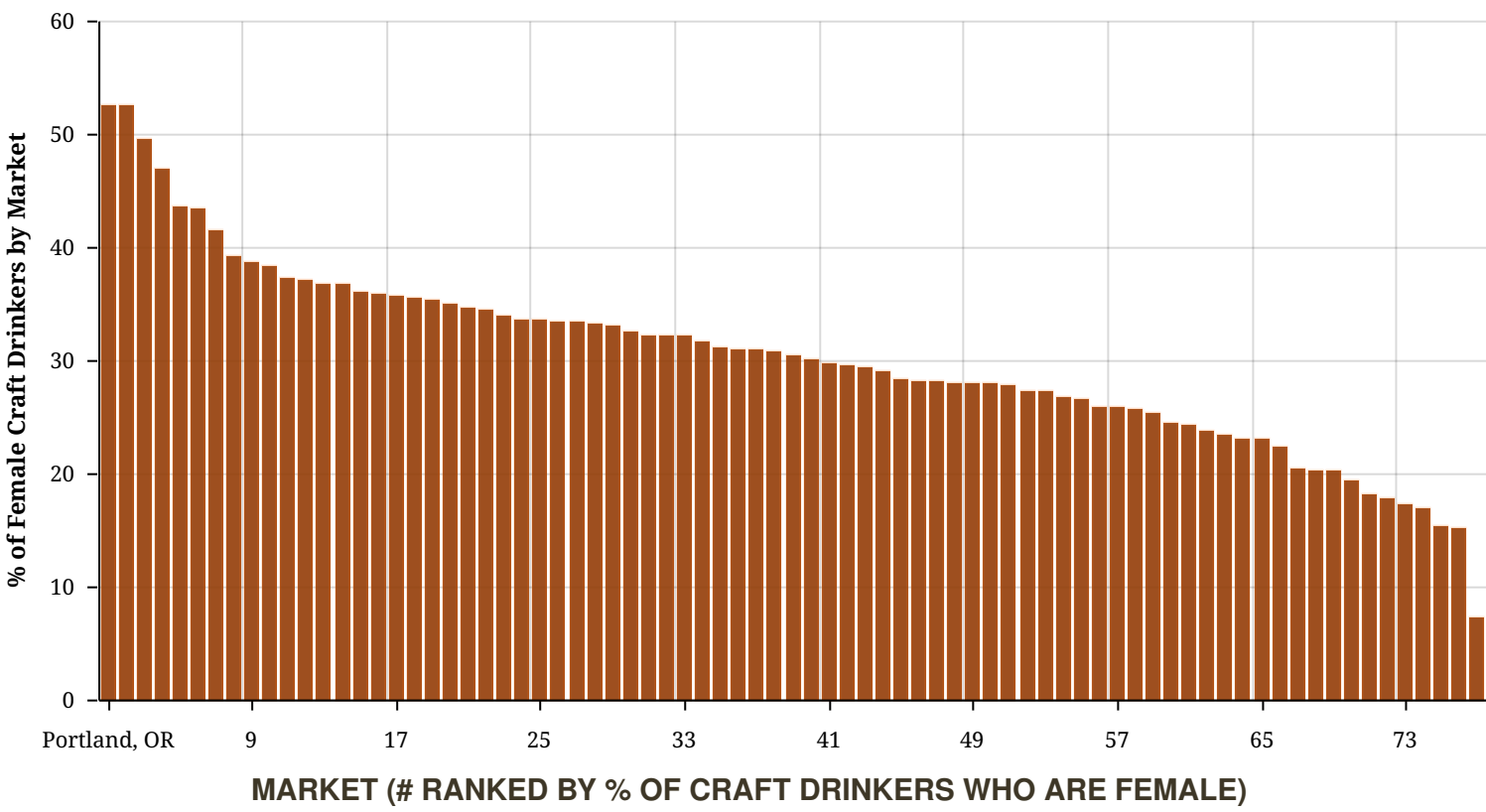
onboarding men and women into the category at roughly their percentages in the population. It’s not quite 50/50, and it will take decades of the same pattern to get closer to parity, but it’s a start.

Want to check that math?

In 2015, there were 234,380,464 21+ adults (Census Bureau) and 35% drank craft beer (Nielsen – Harris on Demand). That’s $.35 \times 234,380,464 = 82,033,162$ craft drinkers. In 2018, we’re estimating that at 241,876,792 21+ and 40% (Harris), so 96,750,717, or 14,717,554 more than in 2015. For female craft drinkers, it’s gone from $.291 \times 82.0 \text{ M} = 23,871,650$ to $.315 \times 96.8 \text{ M} = 30,476,476$, or +6.6M (45% of the total) from 2015.

Although I don’t have time series by local markets, looking at local market data, it’s pretty clear that much of this shift is being driven in particular places. Looking at individual markets, Portland Oregon’s craft drinker breakdown is 52.7% female and 47.3% male (source: Scarborough). The graph below shows the percent of craft drinkers in the 30-day Scarborough data who were female by different defined market areas (DMAs), with a range from 7.4% to 52.7%.

Female Craft Drinkers by Defined Market Area



[MEMBERS ONLY: Access full data by all 77 markets]

These markets represent 83.4% of the total craft drinking population, including 4.44 million women (who drank craft in last 30 days). There are opportunities to grow the craft market on both ends of the spectrum. If the markets where female drinkers are currently below 1/3 of all craft drinkers were at 1/3 female drinkers, that’s more than 640,000 more women in those markets drinking craft every 30 days. If the markets that are above 1/3 but below 1/2 got to 50-50, that’s another 540,000 every 30 days.

Race/Ethnicity and Craft Drinker Demographics

Changes in craft’s demographics by race/ethnicity are less positive in recent years. Although the data show a growth in minority craft drinkers in absolute terms, the changes over time show less movement in percentage terms. In the 2015 Harris poll data, non-Hispanic whites were 86.3% of craft drinkers, with 13.7% coming from other races/ethnicities. In 2018, the percent white

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data, that percentage hadn’t budged. It was 79.9%. There is clearly work to be done in marketing the amazing beers and brands of small and independent brewers to different communities across the U.S. I won’t pretend to have the answer as to how, but look for [more resources from the Brewers Association](#) to help diversify your customer base and organization in the future.

Resource Hub:

STATISTICS & TRENDS



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