INSIGHTS & ANALYSIS

What Consumers Want: Harris Poll Consumer Survey 2024

By Matt Gacioch

Staff Economist

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In the year 2000, Mel Gibson and Helen Hunt teamed up in a romcom that almost certainly has not stood the test of time. Your humble author doesn't have a high enough cringe tolerance to go back and watch *What Women Want*, but I recall that the basic premise is that Gibson's character gets electrocuted and then can hear the unspoken thoughts in the heads of females around him.

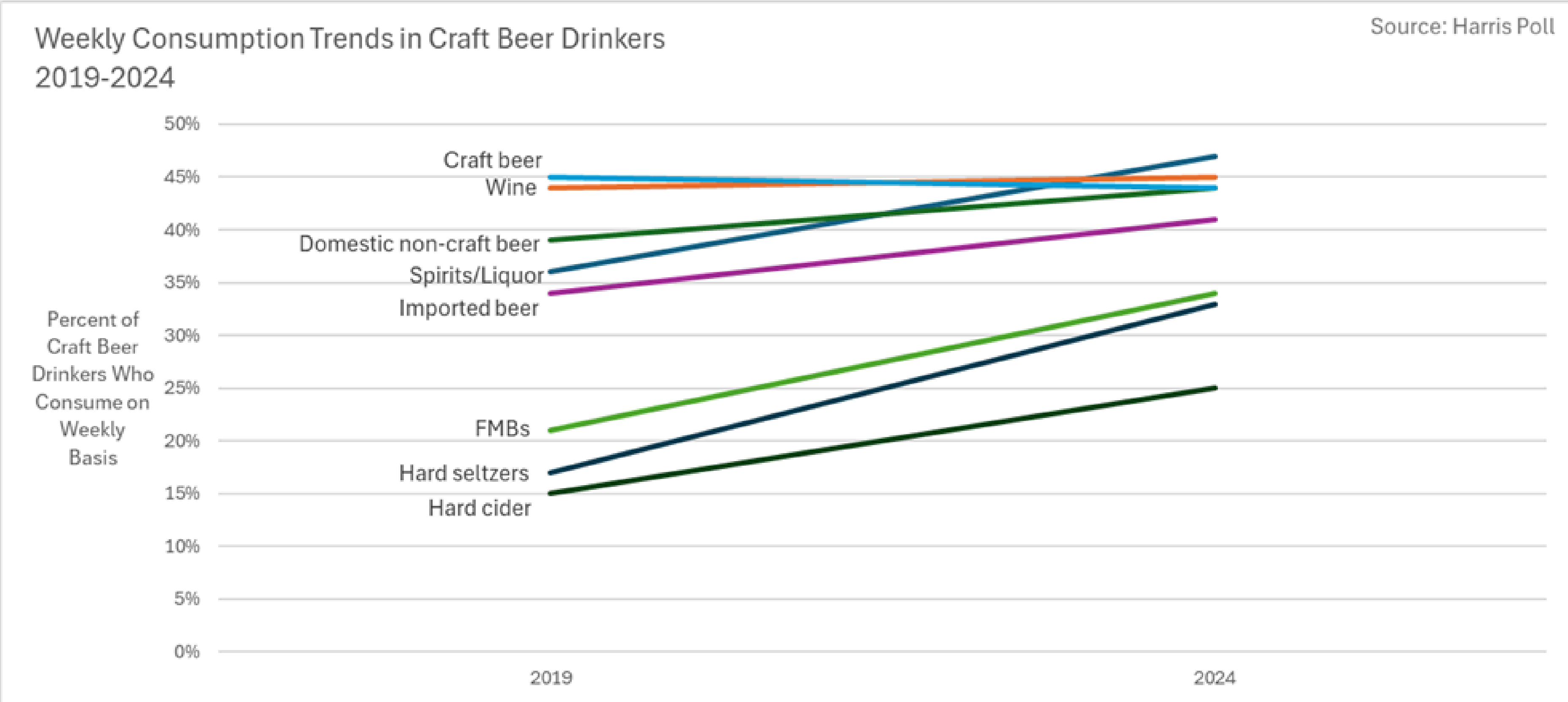
Without the benefit of supernatural forces (or experimental electrocution), we at the Brewers Association (BA) partner each year with Harris Poll to get into the minds of craft beer consumers. Drawing on a representative sample of American adults of legal drinking age, this survey explores who is drinking what, how and where they are drinking it, and why.

Presented first in a BA Collab Hour webinar on July 11, 2024, what follows are some of the major takeaways from that study. In an effort to avoid a post that is the length of a Mel Gibson romcom, we've necessarily pared down what could have been a mountain of analysis. We invite you to scale that mountain at your leisure as we provide all that raw craft beer consumer data to BA members on our website.

Takeaway #1: Everyone is Drinking Everything

Gone, it appears, are the days when you had your "beer drinkers" or your "wine drinkers" or your "spirits drinkers," etc. Especially among youngest cohorts (American adults who are 21-34 years old), the data indicates that these consumers are seeking out multiple alcohol types and multiple categories within types. This trend diminishes among older consumers who are substantially less likely to consume newer product offerings such as flavored malt beverages (FMBs), hard seltzers, or ready-to-drink canned cocktails (RTDs).

Although craft beer used to be the go-to category for flavor exploration, the countless offerings these days have pulled beverage alcohol dollars in multiple directions. Even among craft beer drinkers this is becoming more and more true. Among this group, over the past five years the rate of weekly consumption has increased for all beverage alcohol types, with the only exception being craft beer itself. In fact, craft beer drinkers are now more likely to drink spirits on a weekly basis than they are to drink craft beer.

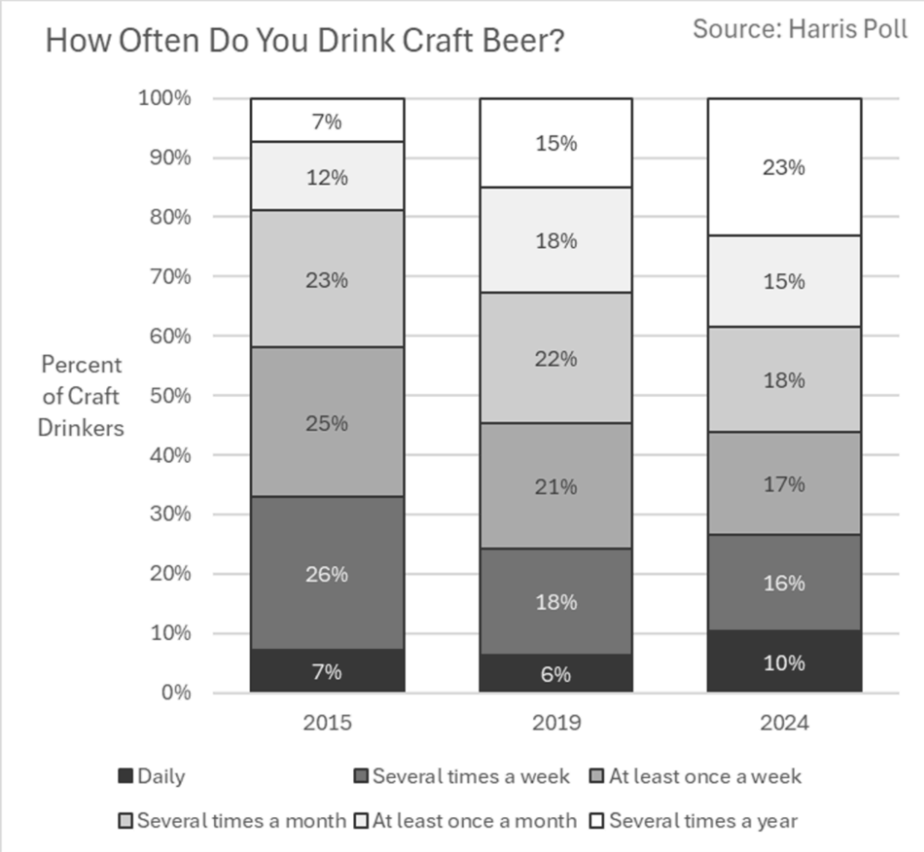


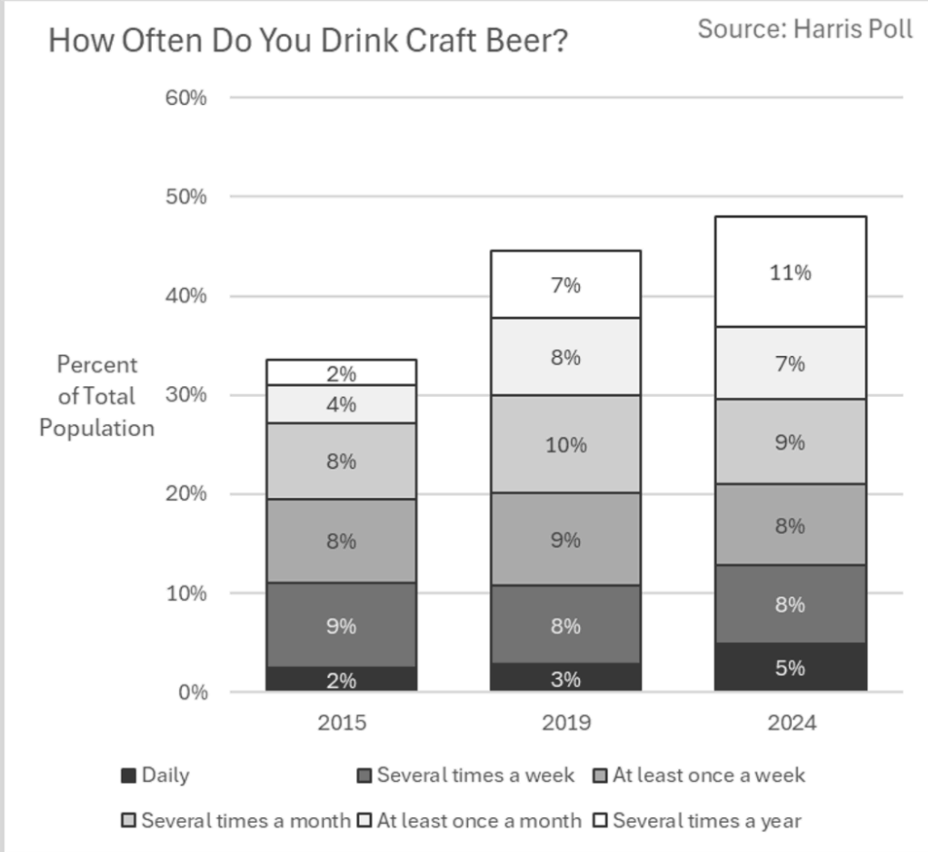
There is some variation in *where* consumers choose to imbibe in different beverage alcohol types. Among the general population, when at home (either alone or with family and friends), wine and spirits are the top picks. Although craft beer only takes top place in one occasion (at a concert or entertainment event), it's the second most popular in many away-from-home occasions including sporting events, restaurants, bars and clubs, and outdoor activities like camping or going to the beach. Despite the growing popularity of FMBs and RTDs, there is still a relatively small portion of the population consuming these beverage types in any given occasion.

Takeaway #2: More Craft Drinkers, Lower Frequency

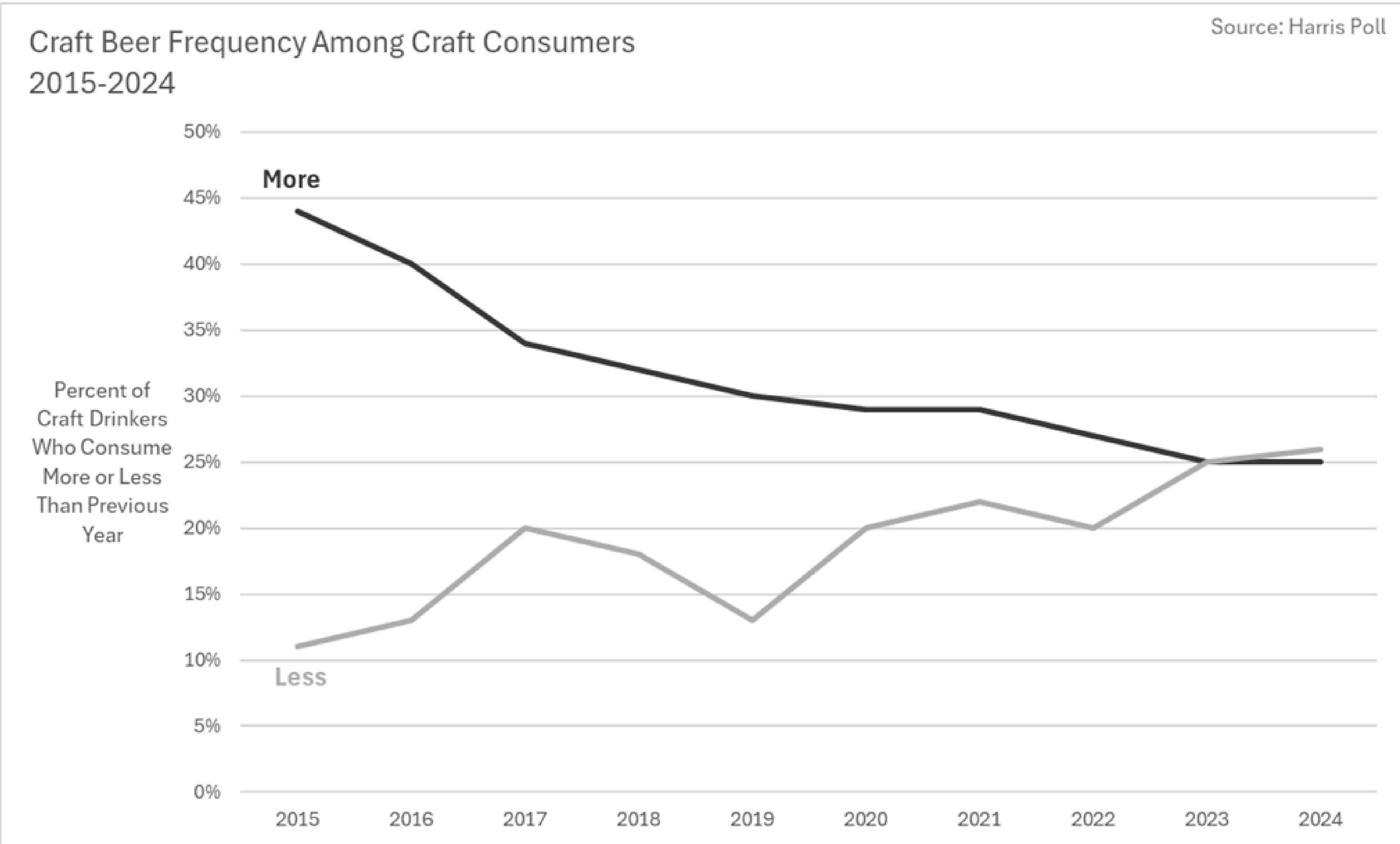
Though it may not feel like it at times, there are more craft beer consumers today than at any other point in our lifetimes. As the U.S. population has climbed over the past decades, so too has the percentage of the population that has consumed craft beer in the past year. And the growth is sizable. Of the American population in 2014, 32% drank craft beer at least several times per year. By 2024, that number has reached 48% of the population.

And yet, what good is a parade without a bit of rain? Among those same craft drinkers, the average frequency of consumption is declining. In 2015, 81% consumed craft beer several times a month or more often. In 2024, that figure has dropped to 62% who drink craft at that same frequency. From highs during the COVID-19 pandemic, both the percentages of consumers who drink weekly and who drink monthly are on the decline. Among the general population however, there's been a steady base of frequent craft beer consumption. This indicates that newer craft drinkers are the ones dipping their toes with infrequent consumption.





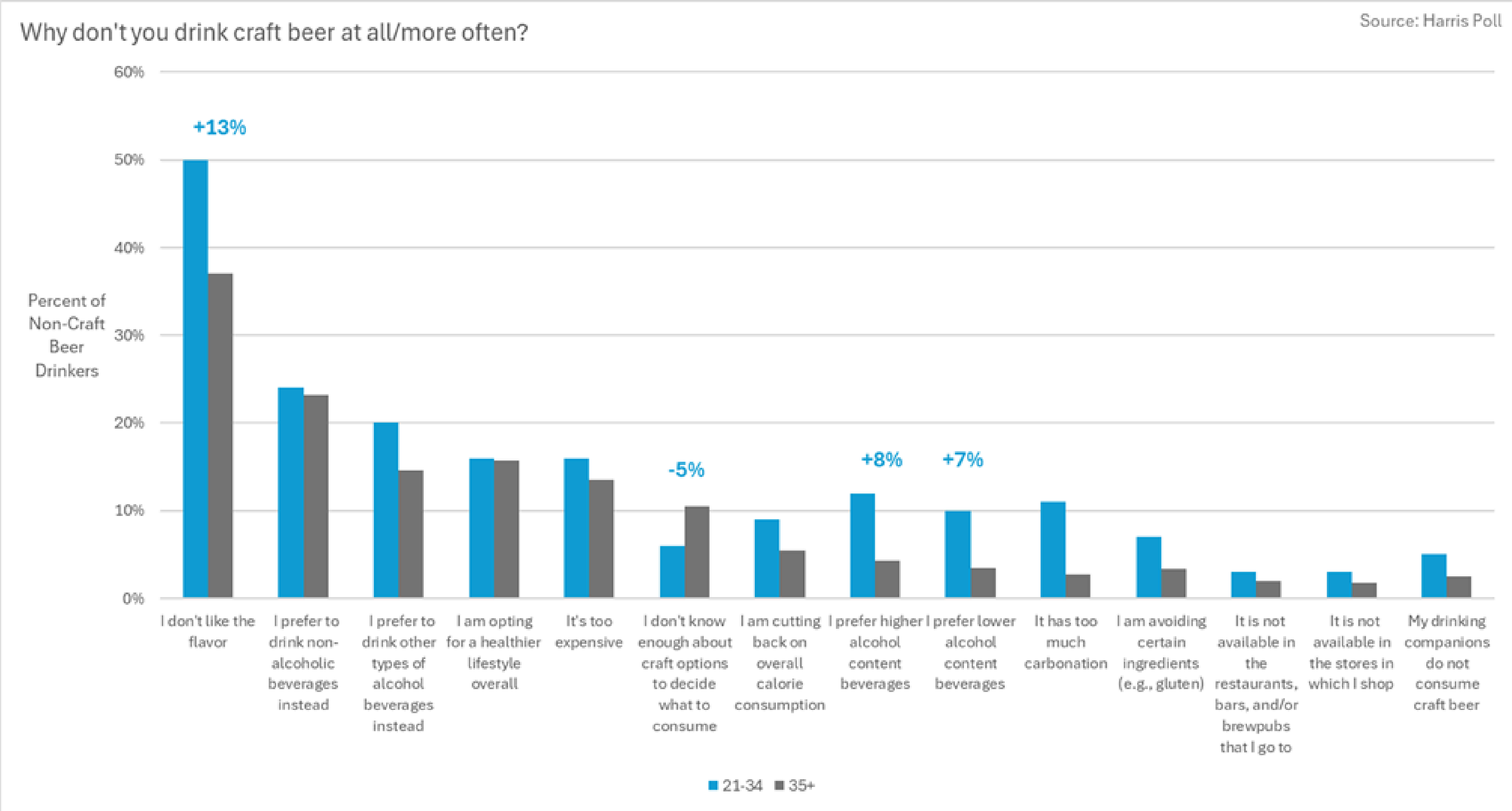
This trend is seen too in whether craft consumers are drinking more, less, or the same amount of craft beer as they did the previous year. Prior to 2024, there were always more people consuming more than less. This year, the trend flipped for the population of craft drinkers. It's not to say that no groups consumed more on average. Larger percentages of younger cohorts (21-44 years old), college graduates, and Black and Hispanic consumers cited drinking more craft beer than less of it. All other groups however, had larger percentages drinking less.



Takeaway #3: Flavor Matters

There are lots of factors that influence a consumer's decision to purchase beverage alcohol. Among those factors, one reigns supreme: flavor. 92% of the general population list flavor as the primary driver in making drinking decisions. Flavor is the most cited factor across all age cohorts, education level, income, and race/ethnicity. Alcohol content and ingredients are the next most important factors, followed by appearance (i.e. packaging), and being locally made.

This focus on flavor is especially apparent in the youngest cohort (21-34 years old) when considering why they don't drink more or any craft beer. While they are 13 percentage points more likely than 35+ consumers to cite flavor as why they don't drink more/any craft, they're also five percentage points less likely than 35+ to cite not knowing enough about craft options. So, these are consumers who feel like they know what they need to know to decide craft beer is not for them. Now it's up to breweries to innovate in a way that can prove them wrong.



If flavor is so important, what are the flavors that consumers are demanding? Across all age groups in 2024, consumers were most interested in crisp, juicy/hazy, and fruity beers. At the same time, they're less interested in tart, spicy, and dark beer flavors. When flavor matters this much, brewery owners must think critically about whether they're offering what consumers want and/or if there is education to be done to break through existing craft beer stereotypes. We encourage you to dive into the webinar and dataset to find what's most relevant to your particular customer base.

In fact, we hope you'll explore further all the takeaways shared in this post. The national and general population trends will not necessarily hold true for your context. Your BA Econ & Stats team invites you to slice and dice the data in the way that suits your needs best. Also, we're always around to help you explore the nuance of what craft beer consumers want.

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WRITTEN BY

Matt Gacioch, *Staff Economist*

Matt Gacioch (he/him), staff economist for the Brewers Association, helps members make sense of the data that enable their businesses to thrive. He brings experience from market analytics, brewery operations, and consulting, along with an MBA, MS, and BS from the University of Michigan. Follow him on Instagram @craft_econ

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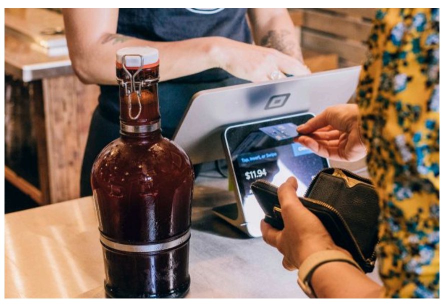

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