

RAISING THE BAR FOR BEVERAGES

2023

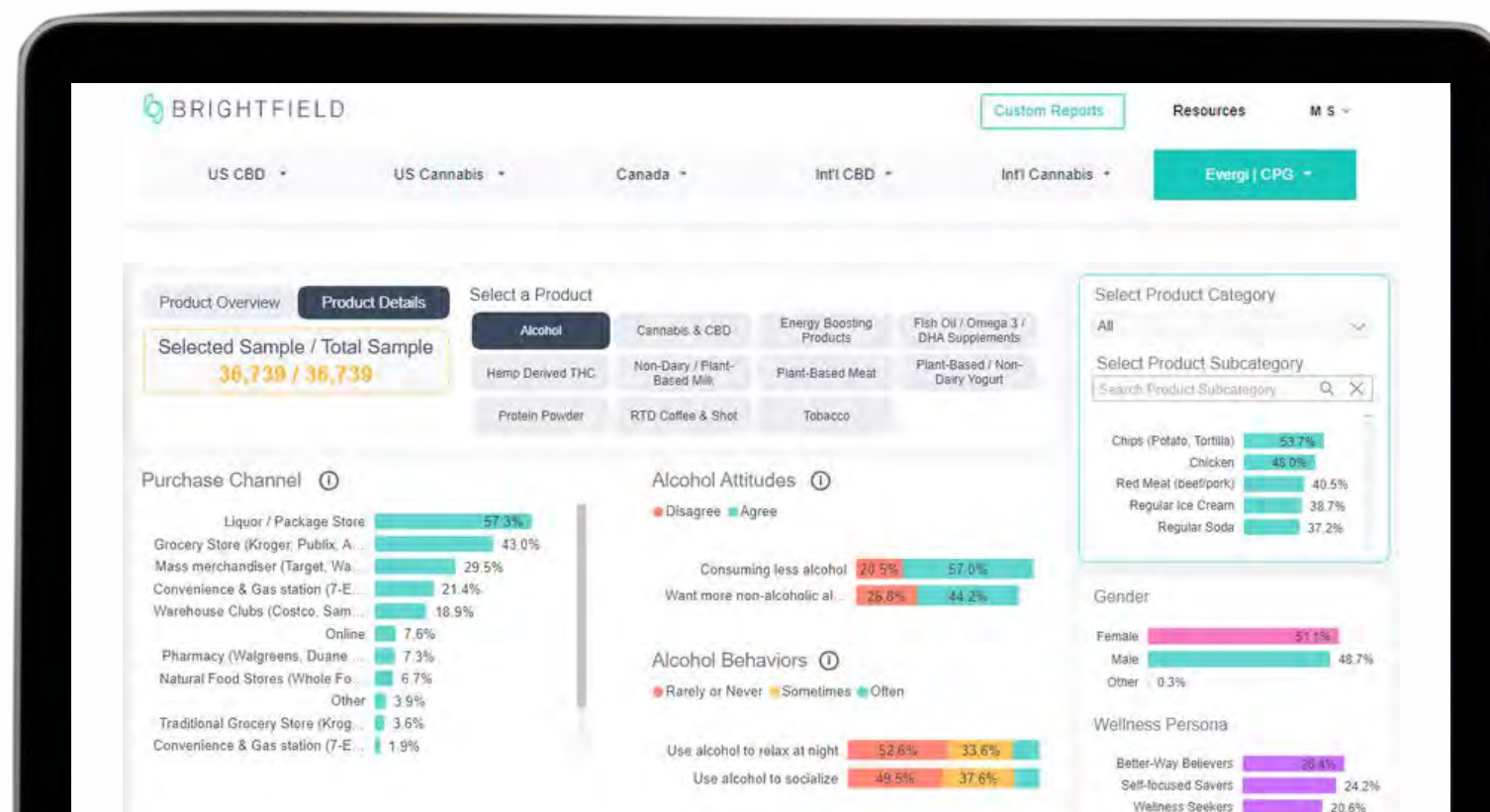
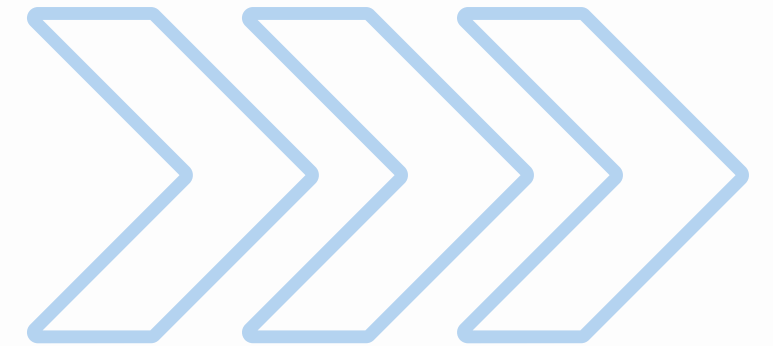
What Americans are Drinking this Summer



Consumer Insights that Connect

Get unmatched visibility into who your consumers are to drive sales, loyalty and brand awareness.

Brightfield is the best source for actionable consumer insights. We help companies develop successful products that meet customers' ever-evolving needs. Innovators use our data to stay on top of emerging categories using social listening and survey data in a user-friendly platform.



About Us

Brightfield Group is the leading social listening-enabled research firm serving the emerging wellness industries and the global cannabis and CBD markets.



This is our **FREE** report

This report includes a small fraction of the data and insights in Brightfield's **Consumer Insights for Wellness and CPG brands**.

Brightfield Group consumer insights are integrated with social listening to dive deep into:

- Alcoholic and NA Beverages
 - Energy-boosting Products
 - Cannabis and CBD
 - Hemp-derived THC's
 - Tobacco
- & so many more categories!**

Get in Touch!

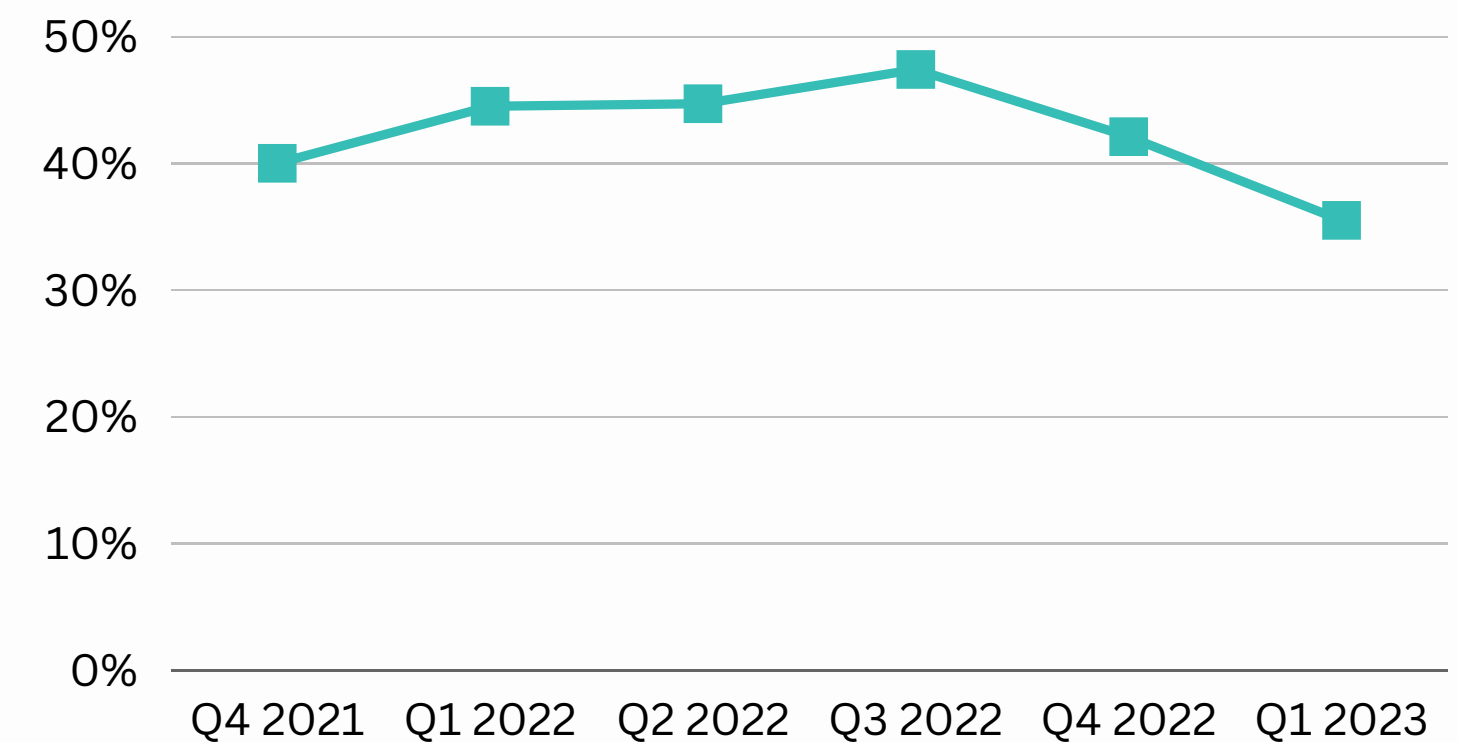


The beverage industry is being shaken (not stirred) by the trends coming out of the post-COVID world.

With a bigger emphasis on health and disruption in socializing around alcohol, consumers have adopted new drinking habits. In this report, we dig into Brightfield Consumer Insights and Social Listening to understand the direction of these changing beverage trends.



% of Americans that Use Alcohol

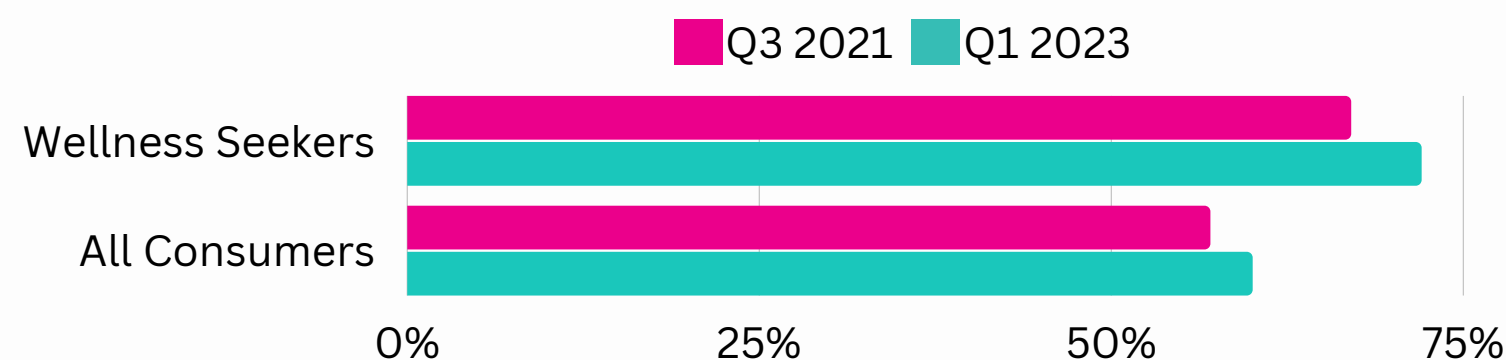


The Trend: Consumers Say They're Drinking Less Alcohol

We ask consumers quarterly if they agree or disagree that they're drinking less alcohol than previously. Since we began tracking this metric in 2021, around 57% of alcohol consumers agreed with the statement. However, in Q1 2023, we saw that **rise to 60%**, driven by increased agreement among the Wellness Seekers personas.

This group represents consumers who are fast followers of the latest well-being trends – especially those on social media – who desire to better themselves and the world while managing their own daily stress. In mid-2021, 67% of Wellness Seekers that use alcohol said they were drinking less - now, in Q1 2023, **72% say so**.

Agree: I'm Drinking Less Alcohol than Previously

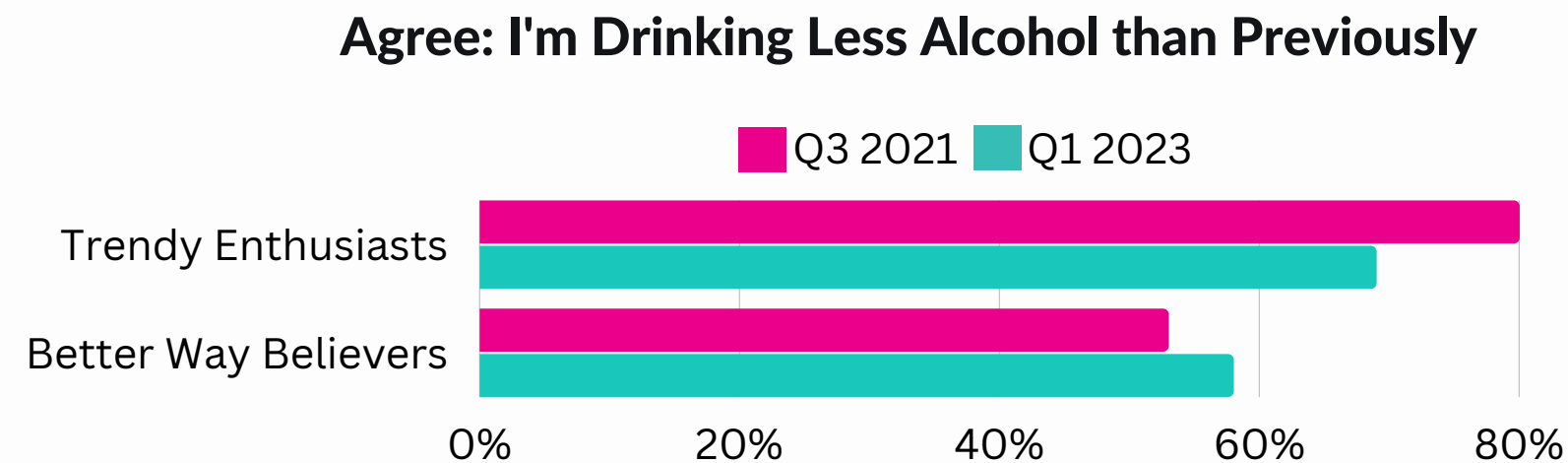


Source: Brightfield Group; U.S. Wellness Consumer Insights; Q1 2023

[See who is drinking less by age, gender, and attitude in the Brightfield portal](#)

Meanwhile, the persona at the cutting edge of trends, the Trendy Enthusiasts, have seen the opposite phenomena. In the middle of 2021, **80% of Trendy Enthusiasts** who used alcohol told us they were drinking less than in the past. Drinking less was very trendy in the summer of 2021, between waves of COVID-19 strains. But now, in 2023, 69% of this group agrees they're drinking less. As the trend of less alcohol use continues, the Trendy Enthusiasts no longer make up most of the pack following the trend.

Better Way Believers are more likely to be using less alcohol now than in 2021. The Better Way Believers are a group that is focused on bettering their bodies and the planet through "the right way" or trying new "proven ways." They don't care about the cutting-edge until they perceive it to be a viable, timeless method of achieving wellness. Today, 58% of Better Way Believers who consume alcohol say they're using alcohol less than previously. In mid-2021, 53% agreed. Seeing more Better Way Believers agree with lower alcohol use is a **sign of this trend's longevity.**



Source: Brightfield Group; U.S. Wellness Consumer Insights; Q1 2023



What They're Swapping In

Understanding what consumers are drinking instead of alcoholic beverages

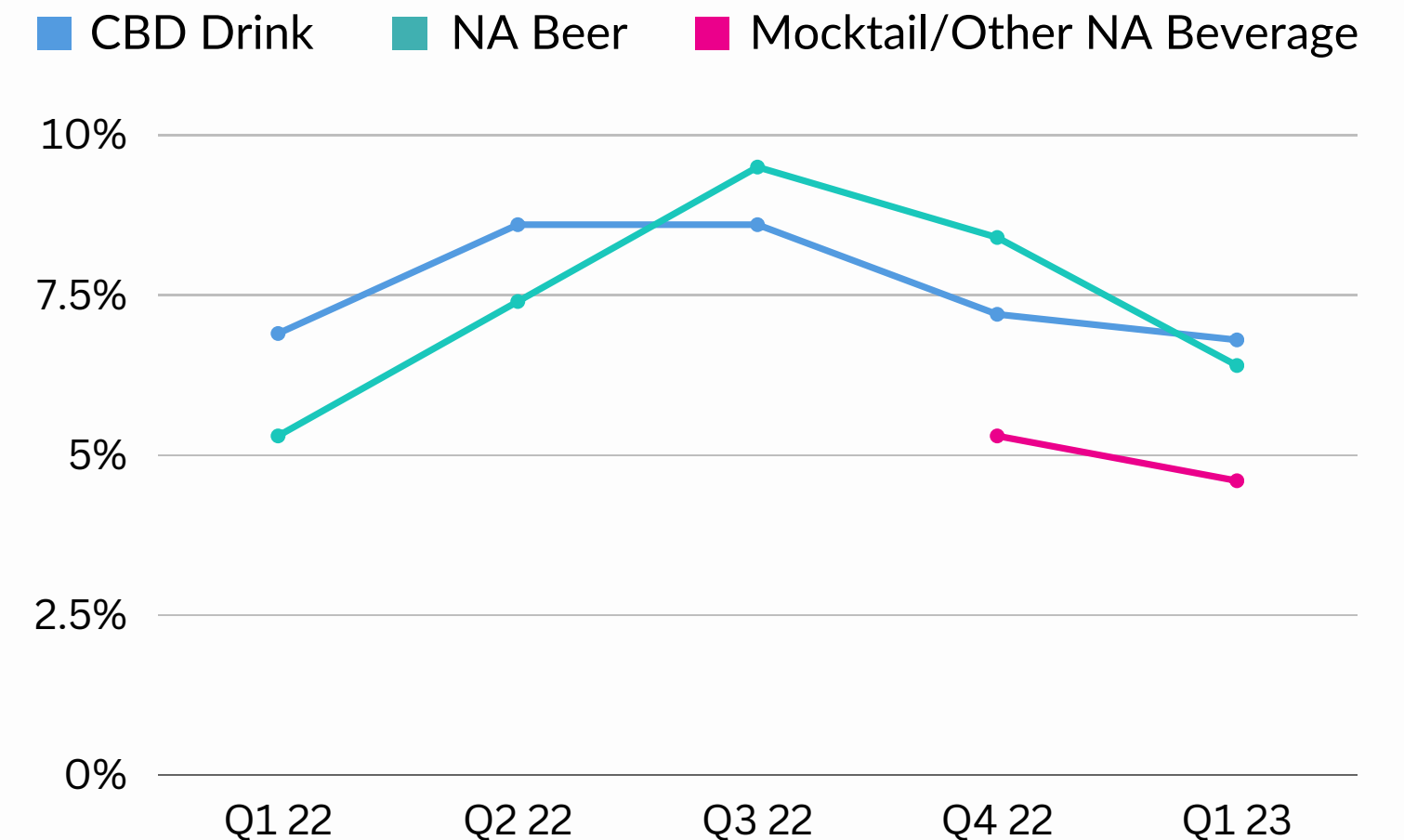
As this trend hits its third summer, there have been numerous new beverage innovations to quench these consumers' thirst in lieu of alcoholic drinks. In previous Brightfield reports, we highlighted the growth of these consumers "drinking smarter and drinking less" and the alcoholic and non-alcoholic options that boomed in 2021 and 2022.

But are "NA options" what consumers really reach for?

The data shows that consumers are opting for more traditional options like **teas** and **soda** rather than trendier options. In fact, from Q4 2022 to Q1 2023, fewer consumers reported NA beer and "mocktail" use. In Q1 2023, **6%** of alcohol consumers drinking less used NA beer, and **5%** used NA mocktails.

Alcohol Substitutes

% of Alcohol Consumers Using Beverage as Alcohol Substitute



[SEE THE DATA BY DETAILED DEMOGRAPHICS IN BRIGHTFIELD'S U.S. CONSUMER INSIGHTS DATA](#)



"NA" Drinks Stall

These findings suggest that despite the hype surrounding NA options, consumers gravitate towards familiar, established choices. Teas and sodas continue to dominate the landscape due to their wide availability, familiarity, and range of flavors.

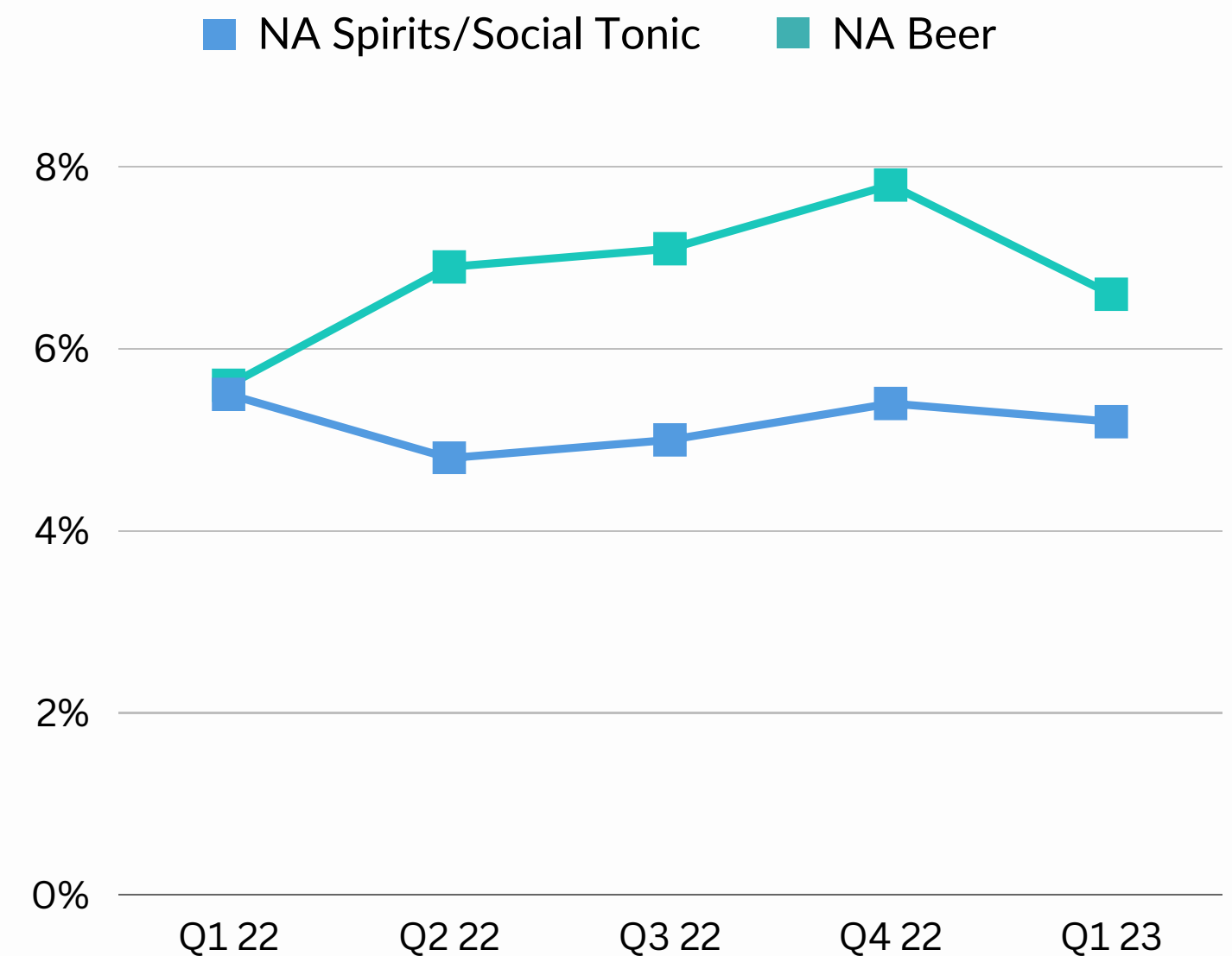
However, the overall demand for non-alcoholic alternatives remains steady, indicating there is still a market for innovative NA beverages that can capture the attention and preferences of consumers seeking refreshing and enjoyable non-alcoholic options.

Non-alcoholic beer, in particular, experienced **6%** growth in usage among the Trendy Enthusiasts alcohol consumers. Overall, we see NA beers enjoyed by more consumers than NA spirits.

Today, **7%** of alcohol purchasers say they buy NA beers - up from **6%** in Q1 2022. NA spirits maintained around **5%** use year over year.

Non-Alcoholic Beer & Spirits Purchasing

% of Alcohol Consumers Purchasing NA beverage



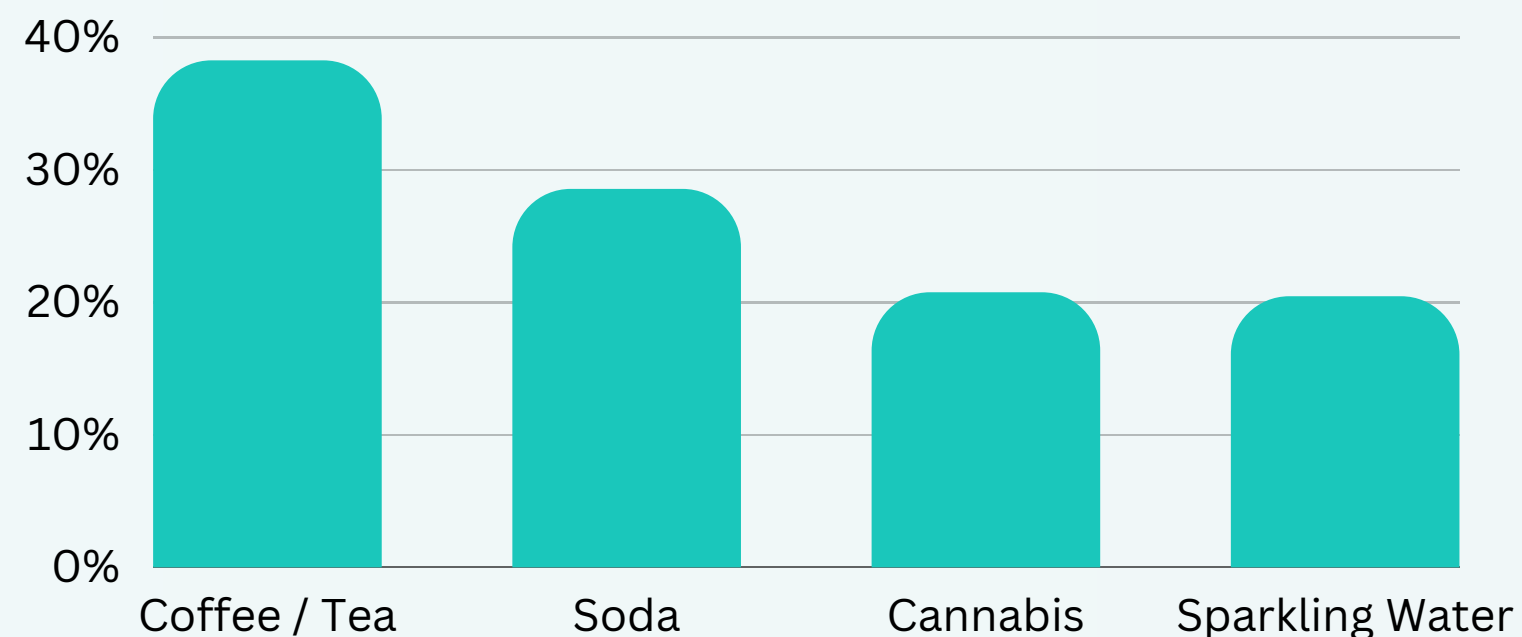
Source: Brightfield Group; U.S. Wellness Consumer Insights; Q1 2023

Traditional Options Prevail

The top substitutes for alcohol consumers drinking less are coffee/tea and soda. **38%** substitute with coffee/tea, and **29%** sip on soda instead of alcohol. These traditional options have widespread appeal and have been making trendy comebacks in the past few years, with craft sodas and ready-to-drink tea options to try.

Alcohol Substitutes

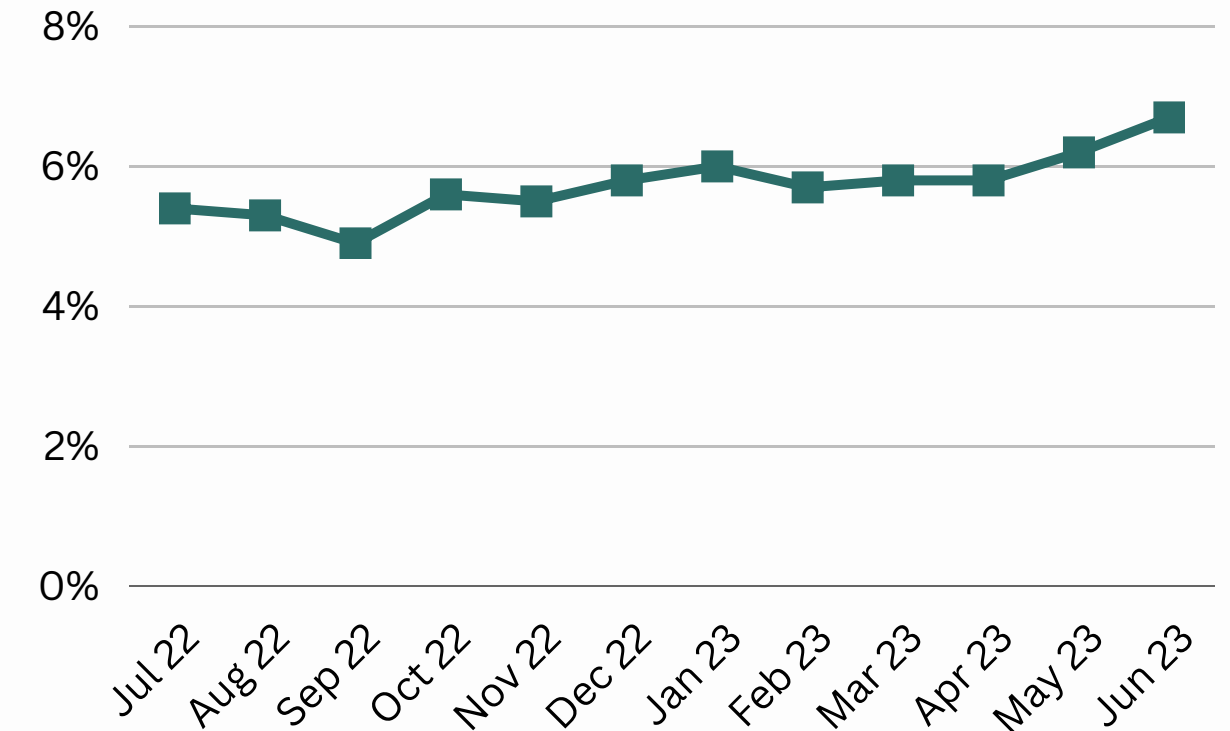
% of Alcohol Consumers Using Beverage as Alcohol Substitute



Source: Brightfield Group; U.S. Wellness Consumer Insights; Q1 2023

Herbal Tea Conversations

% of Twitter & Instagram wellness conversations mentioning herbal tea



Source: Brightfield Group; U.S. Wellness Social Listening; June 2023

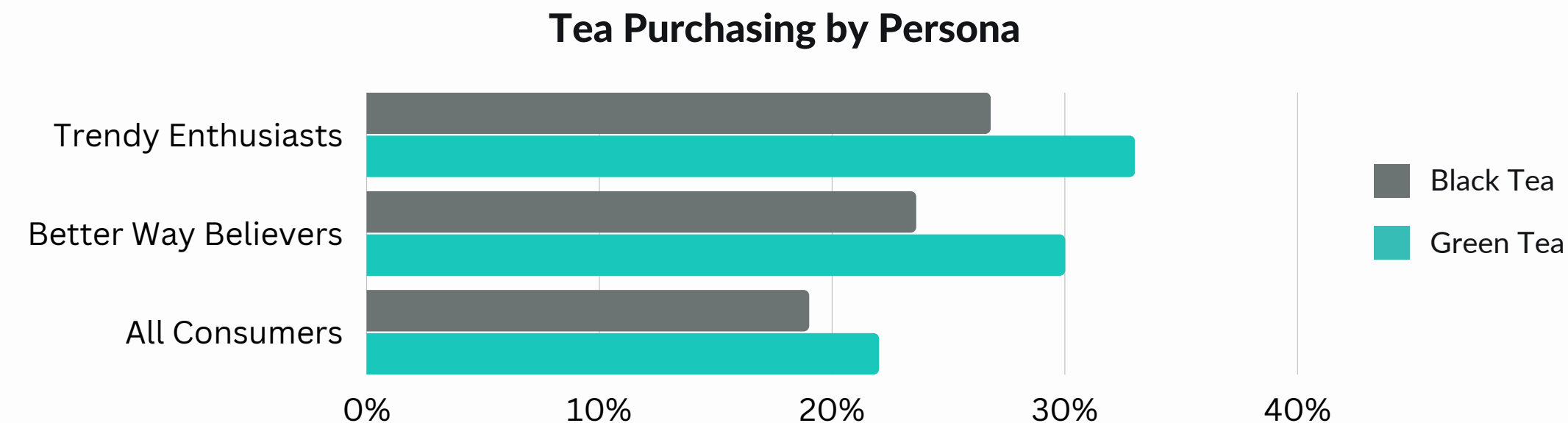
Social listening data shows herbal teas are gaining attention on social media. We see 3% more conversations on Twitter and Instagram on herbal tea now than a year ago.

SOCIAL LISTENING ON HUNDREDS OF PRODUCTS, INGREDIENTS, & FLAVORS IN THE BRIGHTFIELD PORTAL



Tea - The Sweet Spot of Function and Tradition

When looking at who is purchasing teas, we see Trendy Enthusiasts over-index for buying black tea, green tea, and herbal tea. However, the Better Way Believers are also over-indexing for black tea and green tea. Enjoying a cup or glass of tea is a tried-and-true beverage, but innovations in ingredient and flavor revived its trendiness in recent quarters.



Source: Brightfield Group; U.S. Wellness Consumer Insights; Q1 2023



Hangover-Free Buzz: Cannabis

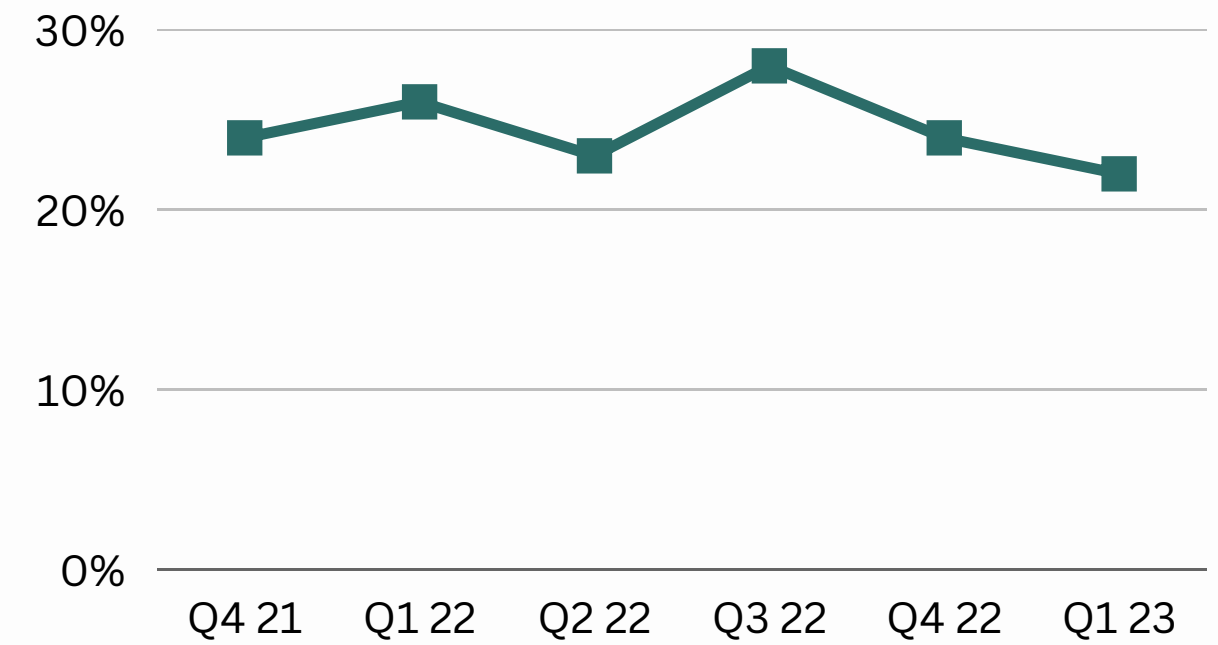
20% of alcohol consumers drinking less say they substitute with cannabis.

Cannabis is becoming accessible to more consumers as legalization happens state by state. Cannabis has become a good option for those looking to maintain a psychoactive buzz without alcohol. Since drinks are a more approachable format than smoking, many in the beverage industry see THC drinks as a prime opportunity to cater to cannabis consumers.

While cannabis is used as a substitute for 20% of all alcohol consumers drinking less, we see **37% of Gen Z** consumers substituting with cannabis. Today, many Gen Z are turning 21 with access to alcohol and cannabis, giving this generation more choices for legal psychoactive experiences than ever before.

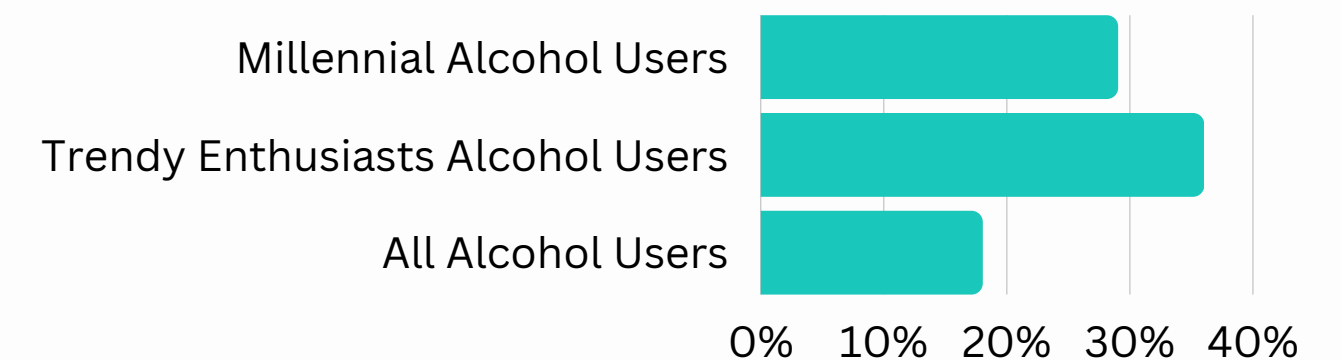
Brightfield asks consumers if they prefer cannabis to alcohol in social settings. 18% of alcohol users agree they prefer cannabis! However, the **millennials** of those group are even more likely to prefer THC - **29% of them say so**. Further normalization and legalization of public places to partake in cannabis will likely accelerate this trend.

% of Americans that Use Cannabis



Prefer Cannabis to Alcohol

% of Alcohol Consumers Preferring Cannabis to Alcohol in Social Settings





Stay ahead of beverage trends!

The data is yours to explore with Brightfield Consumer Insights & Social Listening



[Get in Touch!](#)



About Brightfield Group

Brightfield Group is the leading social listening-enabled research firm serving the global cannabis, CBD, and emerging wellness industries.

We combine traditional research expertise with AI-integrated social listening to provide a deeper level of consumer insights.

Marketing, innovation, and insights leaders have trusted us to help drive customer-centric strategies since 2015.

[Learn more about our data at www.brightfieldgroup.com](http://www.brightfieldgroup.com)

