



ALTERNATIVES TO ALCOHOL: NON- ALCOHOLIC DRINKS REPORT

2024

Based on Q4 2024 Data

 BRIGHTFIELD GROUP

About Brightfield Group

Brightfield Group's AI-driven consumer insights and social listening help marketing and innovation teams see the person behind the trend.

Informed by predictive AI integrated with **survey** and **social media** data, our data has the answers innovators need to make decisions confidently.

Problem	Solution  BRIGHTFIELD GROUP	Outcome
I need more <u>customers</u>	Category-specific consumer insights across brands and channels	Double your customer base!
I don't <u>know</u> what product to develop next	Social listening into trending products, flavors, and ingredients + actual consumer adoption across trendy & traditional segments	New product development that is 10x more efficient!

Methodology Overview

 BRIGHTFIELD GROUP Built by insights people for insights people!

SURVEY DATA

Over 40,000 consumers surveyed



Questionnaire fielded quarterly since Q3 2021 with dynamic edits to account for the latest trends over time



Quotas & weighting were used to achieve a nationally representative sample, including age, gender, income, & region



Wellness-oriented questions that reveal attitudes, behaviors, & purchasing of over 150 products



SOCIAL LISTENING



Over 10 million conversations collected since 2021

Posts pulled based on wellness-focused hashtags & topics

Posts tagged by Need State, Product, Ingredient, Flavor, & Condition using AI-enabled machine-learning & natural language processing

Neural network training to help AI predict gender, age, and persona

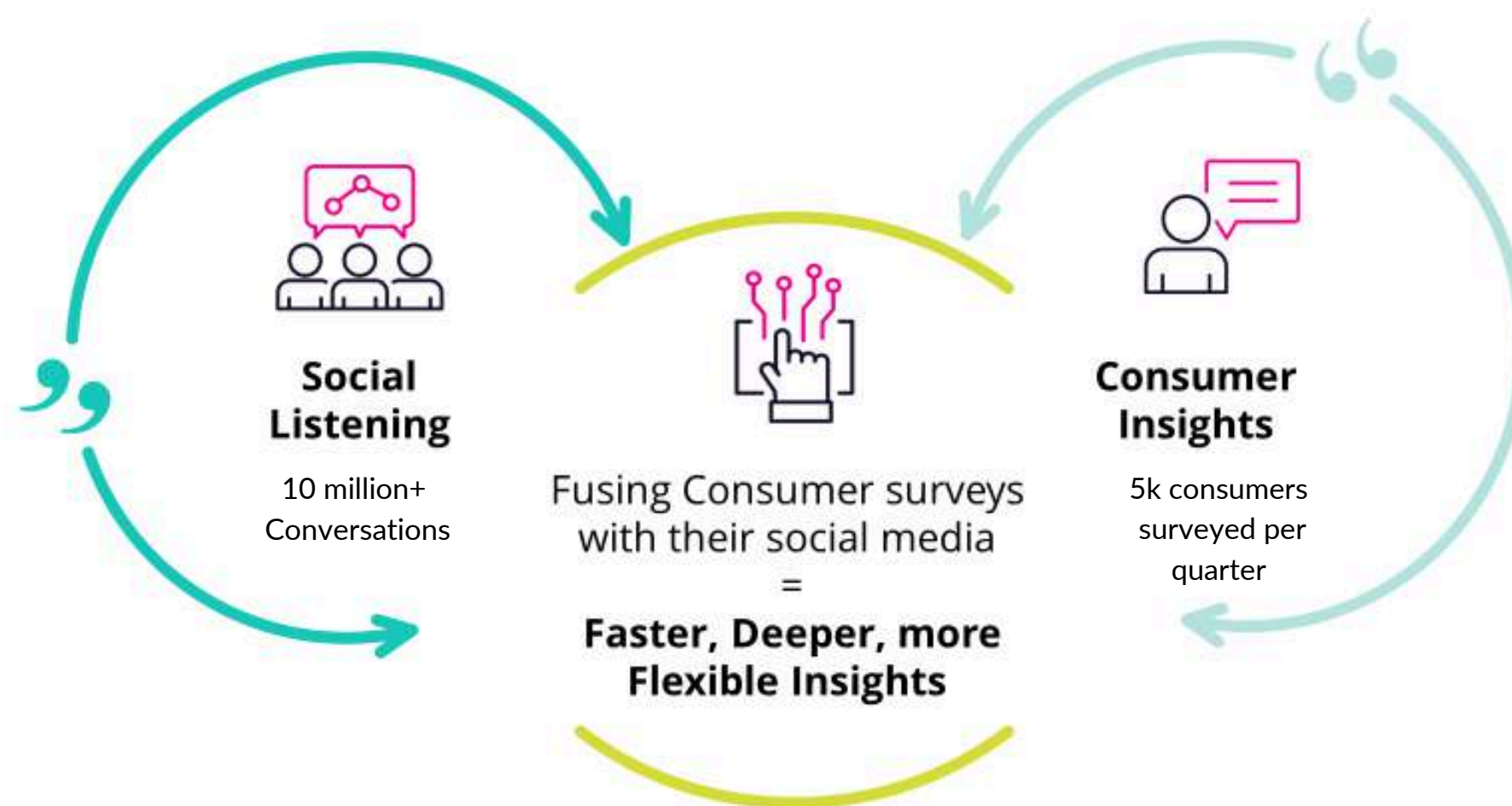


ABOUT BRIGHTFIELD GROUP CAPABILITIES for CPG

Surveys + Social: The Brightfield Difference

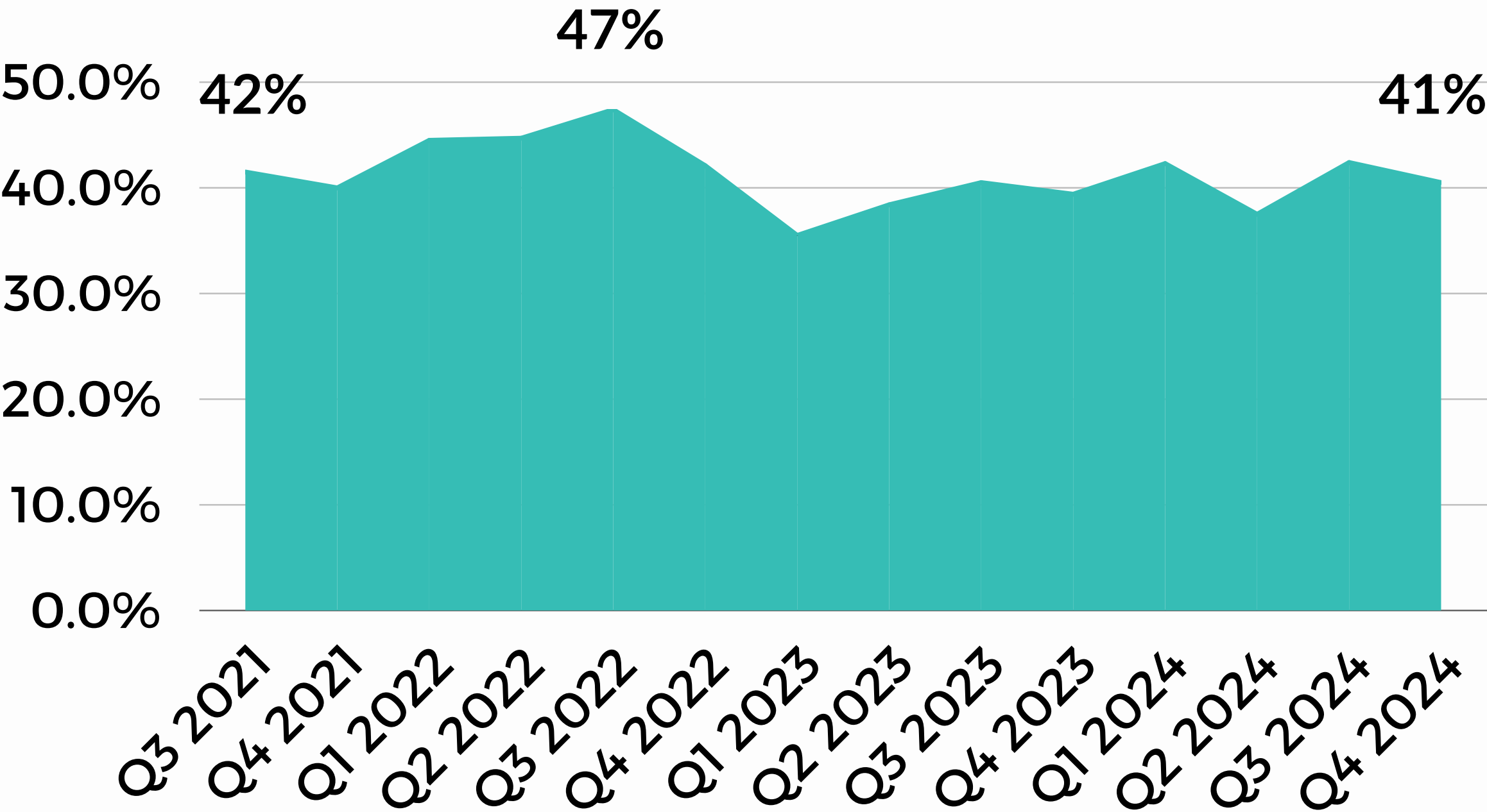
Brightfield Group's AI-Driven consumer insights empowers marketers and product developers to innovate & brand with confidence.

Ignite Your Innovation Journey with AI-Driven Consumer Insights



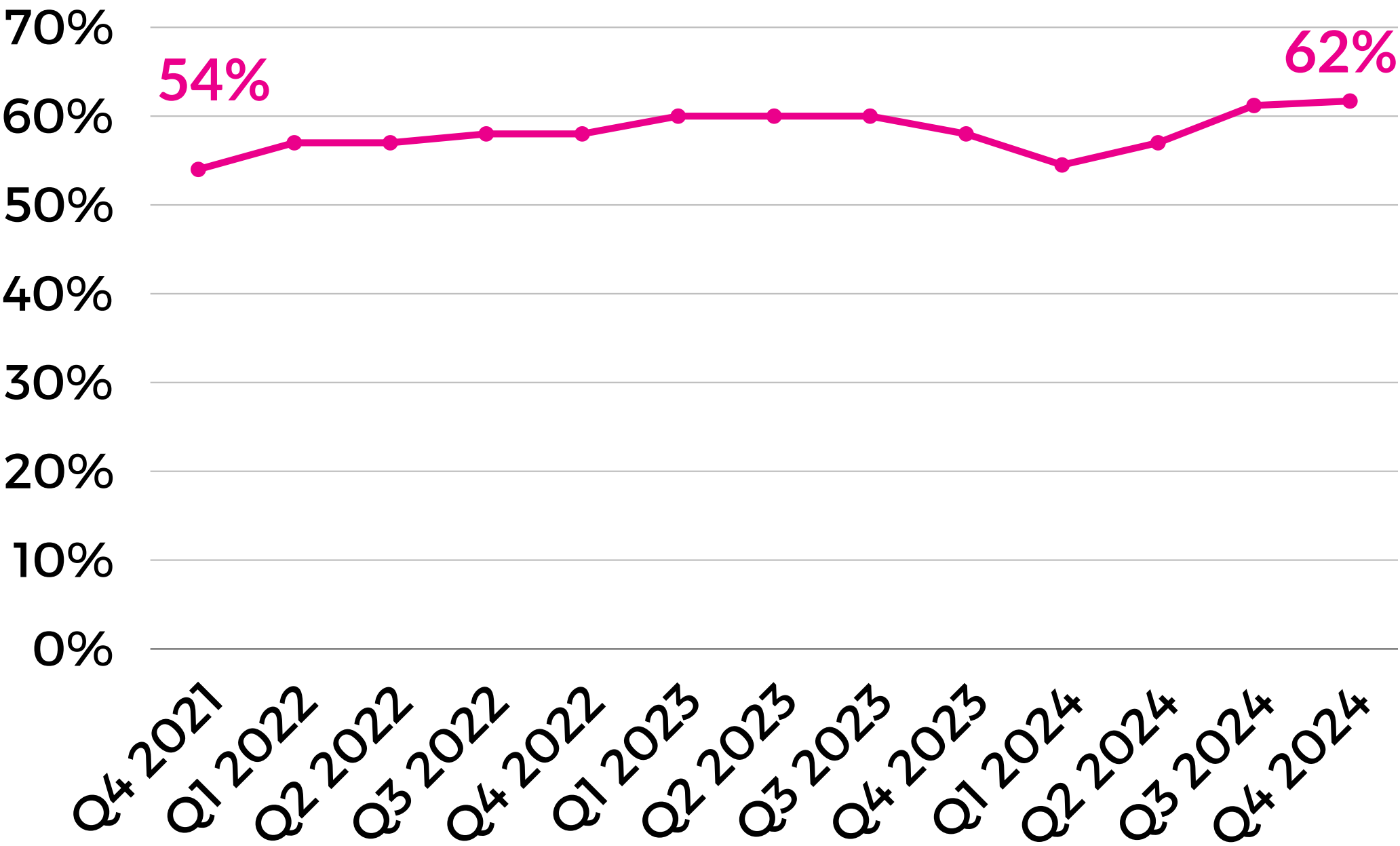


American alcohol consumption has been depressed since late 2022



Source: Brightfield Group; Wellness Consumer Insights; Q4 2024

Over 60% of alcohol consumers reported wanting to drink less, increasing over the course of 2024



45% say it's to be healthier



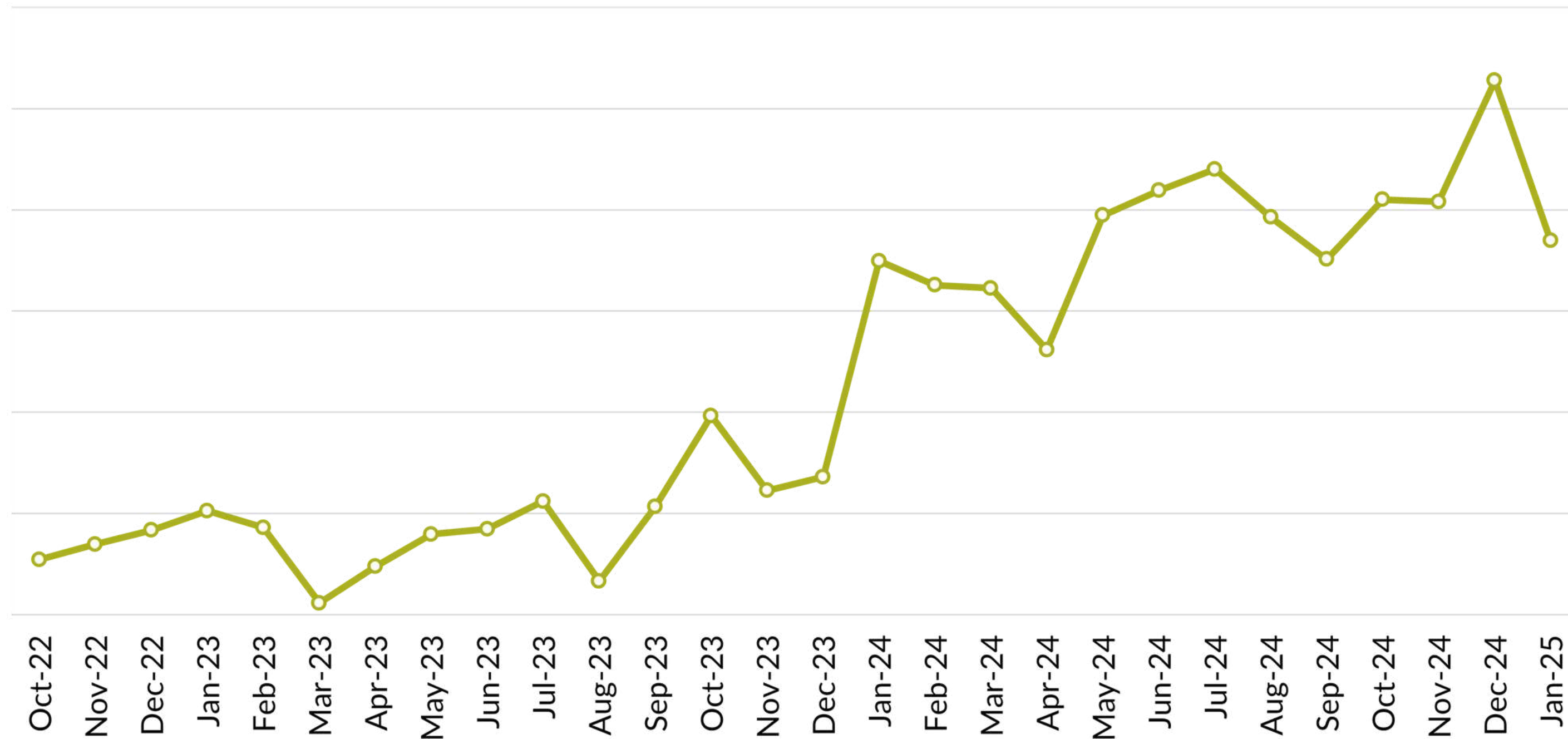
36% say its to save money



25% say it's for mental health

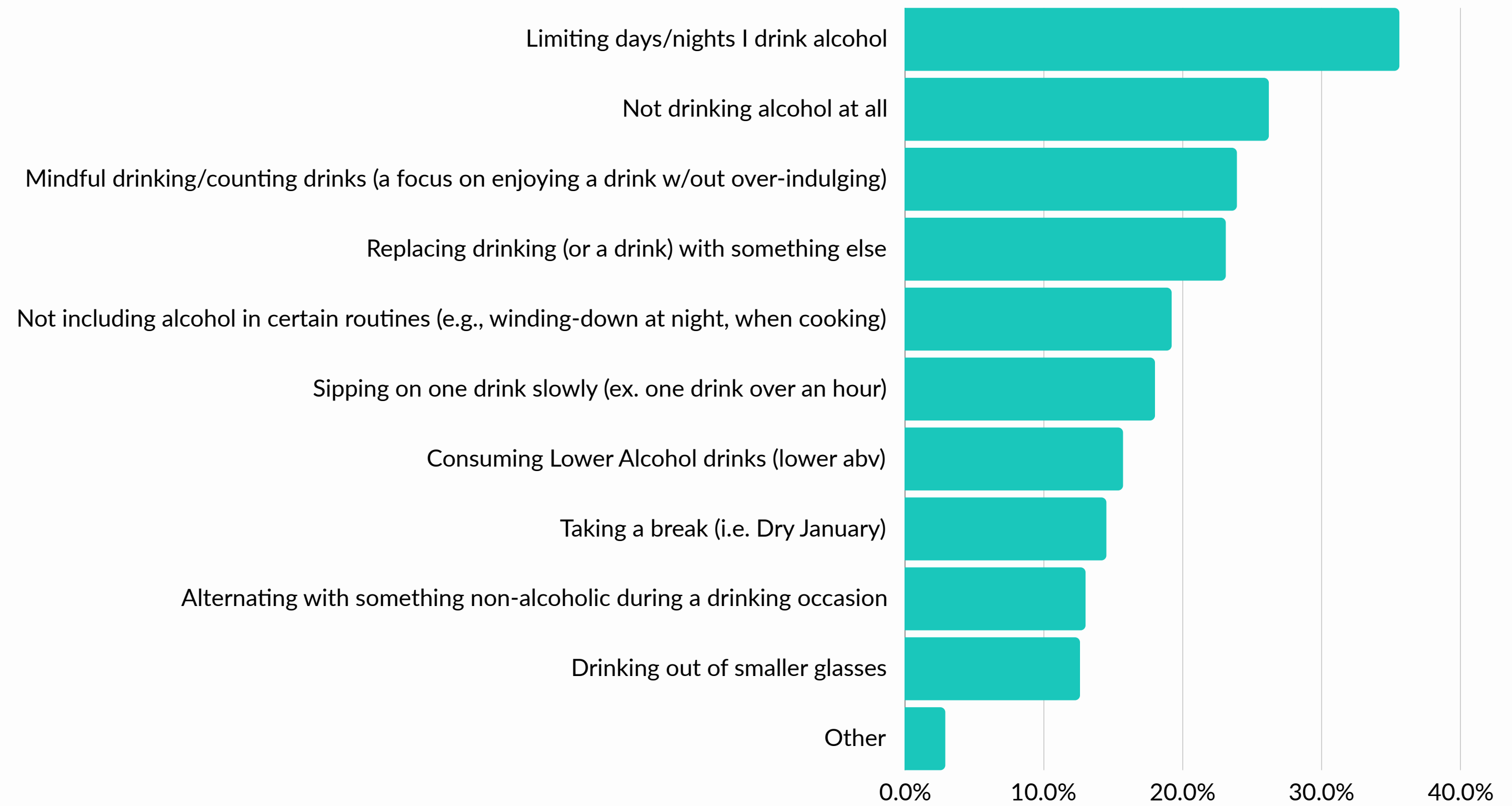


The prevalence of non-alcoholic drinks has been trending upwards in social listening data, peaking in December 2024





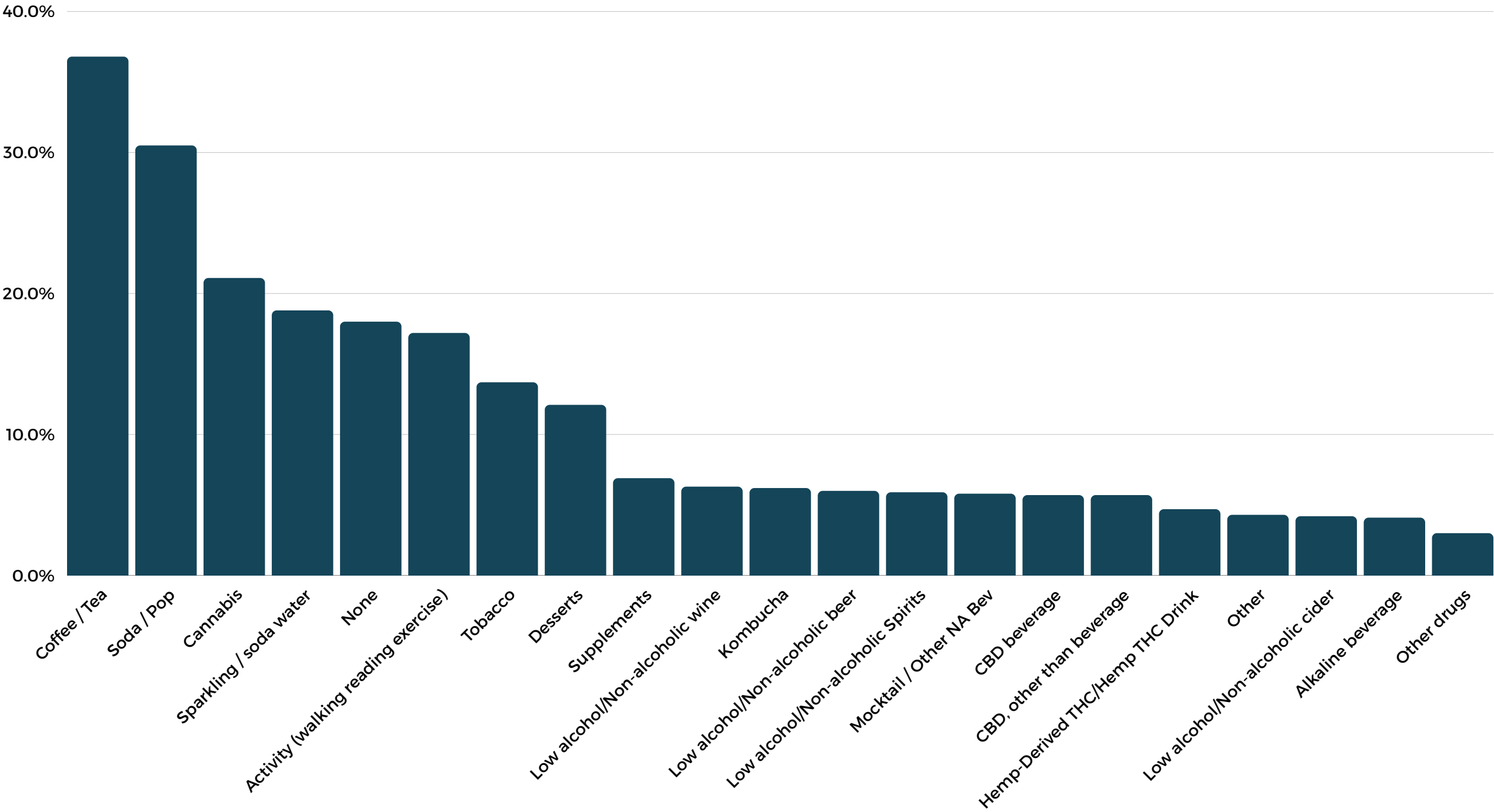
Most consumers are reducing with some strategy, though 25% are trying to stop altogether



Source: Brightfield Group; Wellness Consumer Insights; Q4 2024



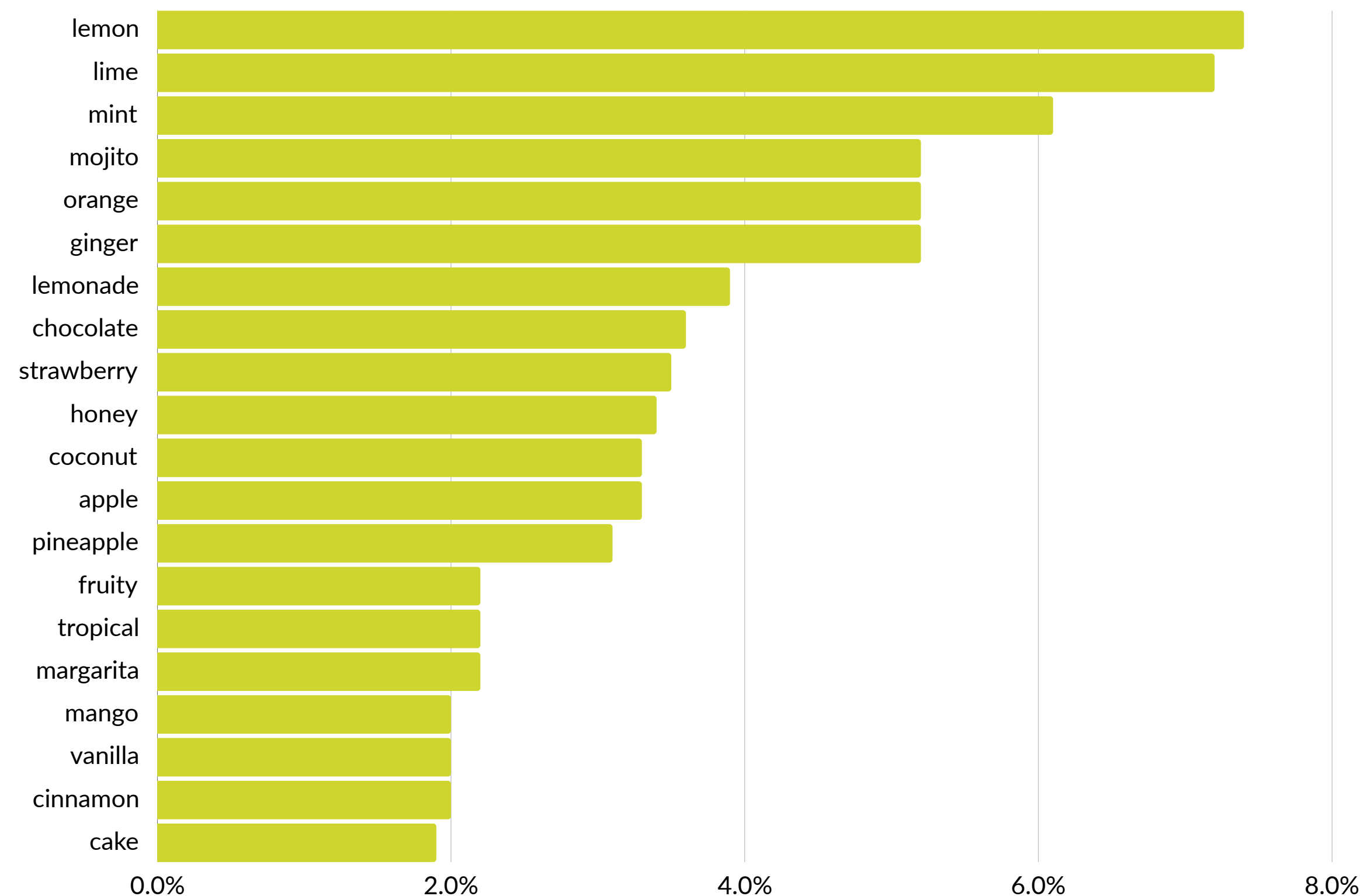
Common alcohol alternatives include coffee, soda, and cannabis



Source: Brightfield Group; Wellness Consumer Insights; Q4 2024



Lemon and Lime are the top flavors mentioned in social posts around non-alcoholic drinks

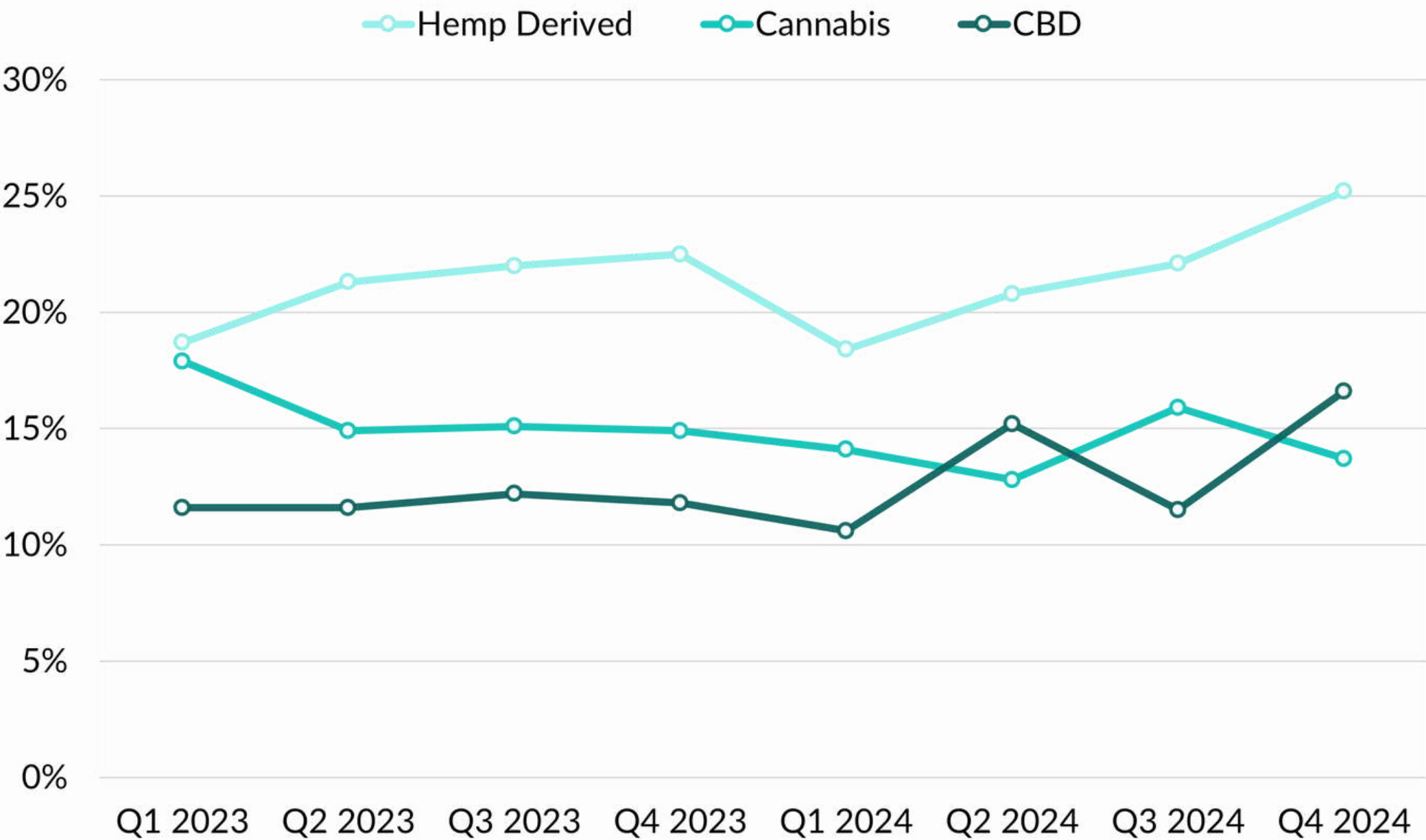


Source: Brightfield Group; Wellness Consumer Insights; Q4 2024



Competition from cannabis is likely fueled by widespread availability of hemp-derived products

P3M Drink Purchase Incidence, % of Substance User Base



In Q4 2024, 14% of Americans report using hemp-derived THC

Source: Brightfield Group; Wellness Consumer Insights; Q4 2024



Beer is the most commonly used non-alcoholic alternative drink

**Purchase Last 3 Months
Incidence Among
American Adults:**

- 1.7% NA Beer
- 1.2% NA Spirits
- 1.1% NA Wine



**While an established category,
non-alcoholic drinks continue to
attract interest and investment,
including from high-profile
public figures like Tom Holland**

Source: Brightfield Group; Wellness Consumer Insights; Q4 2024

Who are the alcohol reducers?

- Above-average income
- More likely to live in a city
- Skew male
- Most commonly Gen X or Millennial

FROM THE PORTAL

Alcohol Reducers

Income Level ⓘ



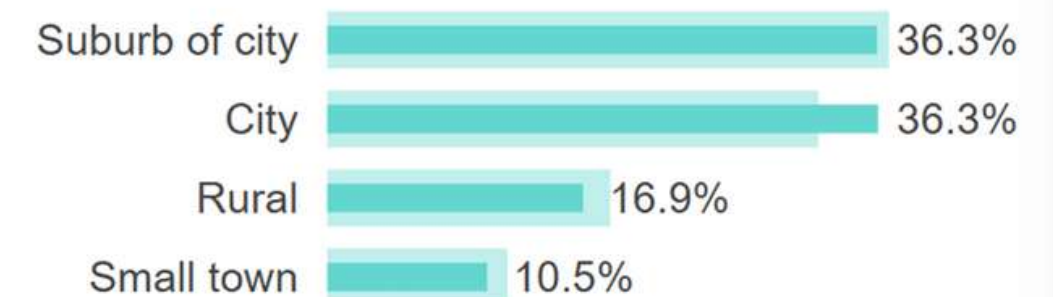
Generation ⓘ



Gender

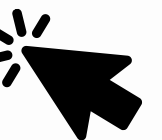


Dwelling ⓘ



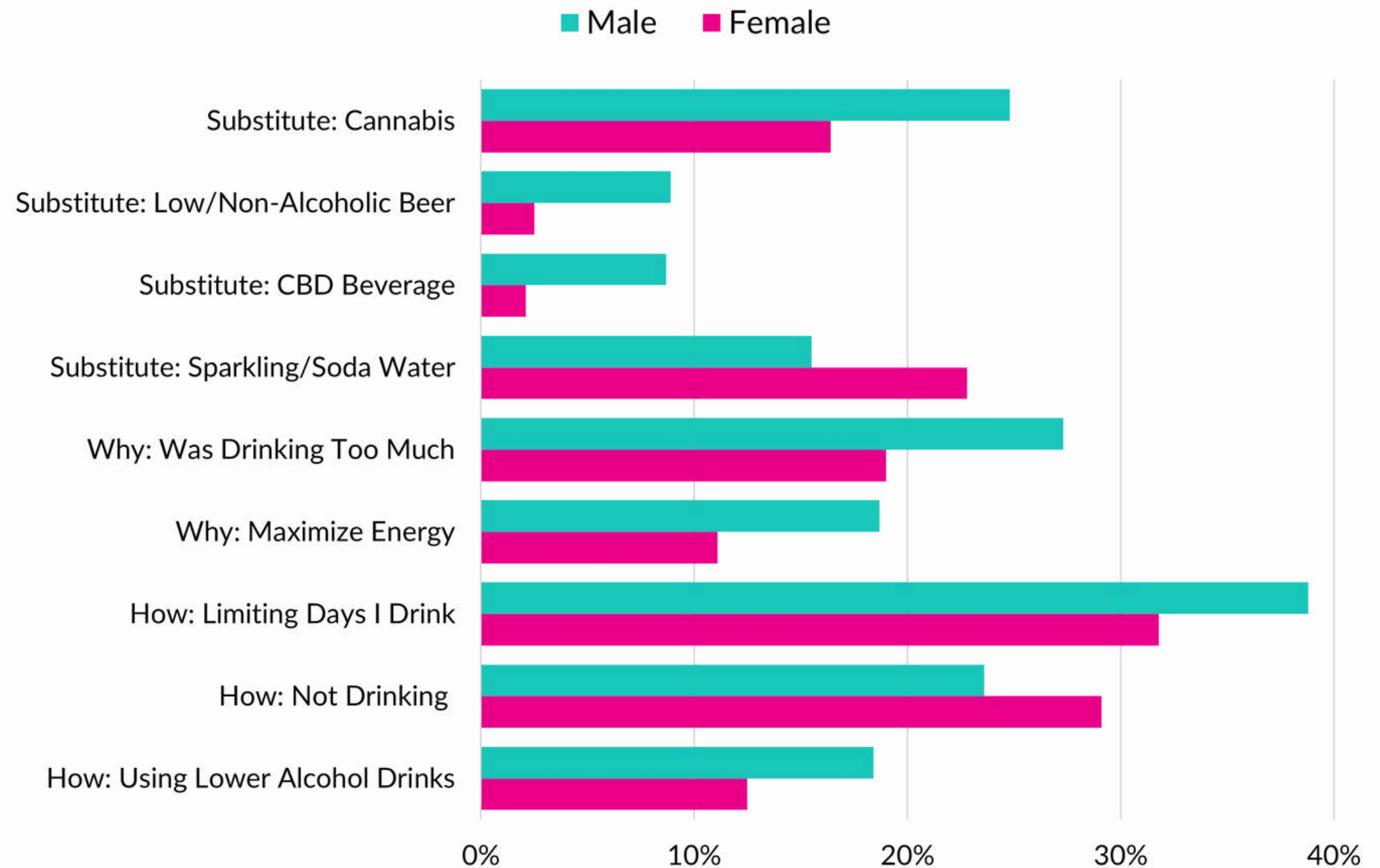
FILTERABLE DATA HELPS YOU FIND THE TRENDS FAST IN BRIGHTFIELD'S WELLNESS CONSUMER INSIGHTS PORTAL

Source: Brightfield Group; Wellness Consumer Insights; Q4 2024





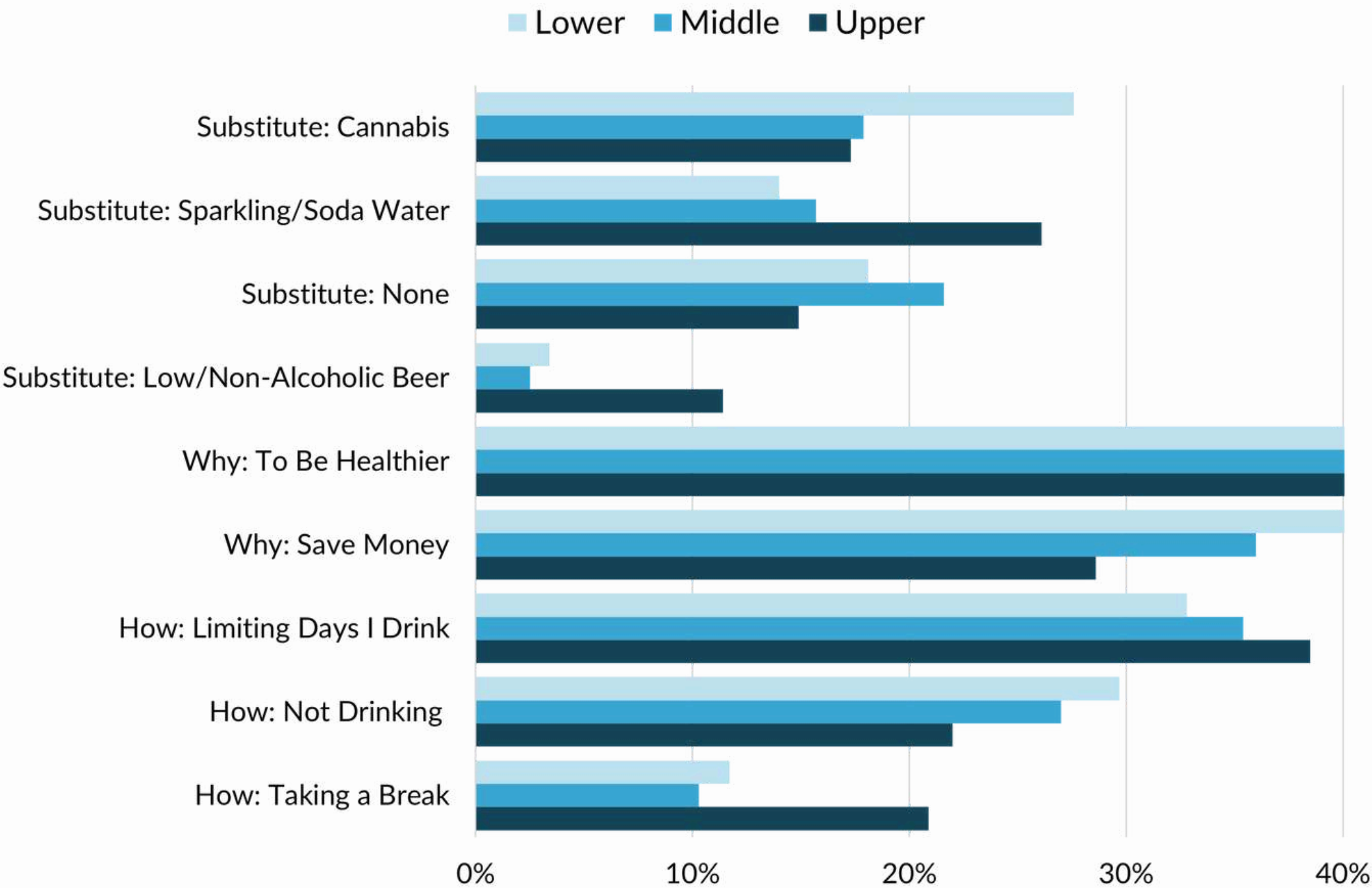
Segmenting by gender, Male respondents are more likely to use cannabis and limit their alcohol consumption without cutting it out



Source: Brightfield Group; Wellness Consumer Insights; Q4 2024



By income, higher income reducers more often opt for sparkling/soda water or non-alcoholic versions, often just taking a break from drinking



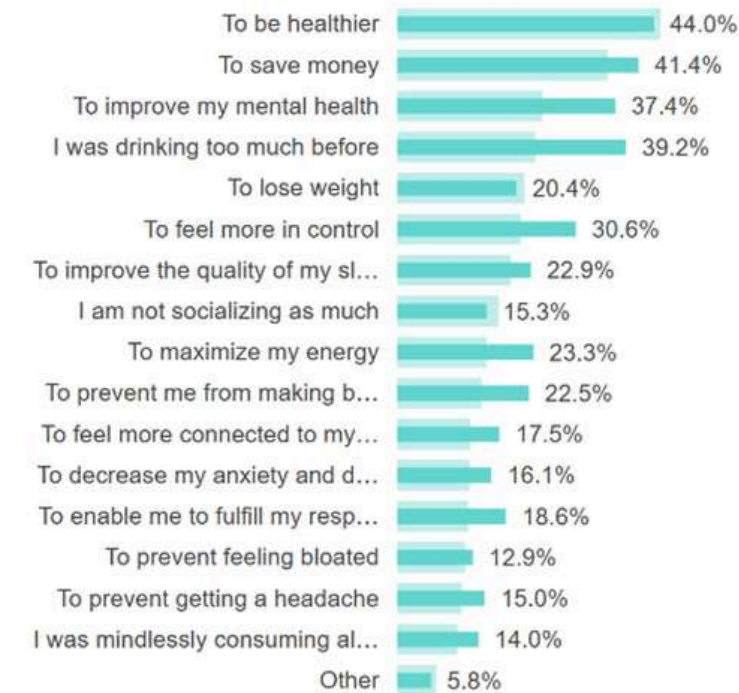
Source: Brightfield Group; Wellness Consumer Insights; Q4 2024

Who are the cannabis substitutors?

- Lower income
- Over-index as Wellness Seeker and Trendy Enthusiast personas
- Less Baby Boomer
- Reduce alcohol for a wider array of reasons

FROM THE PORTAL Reducers Subbing Cannabis

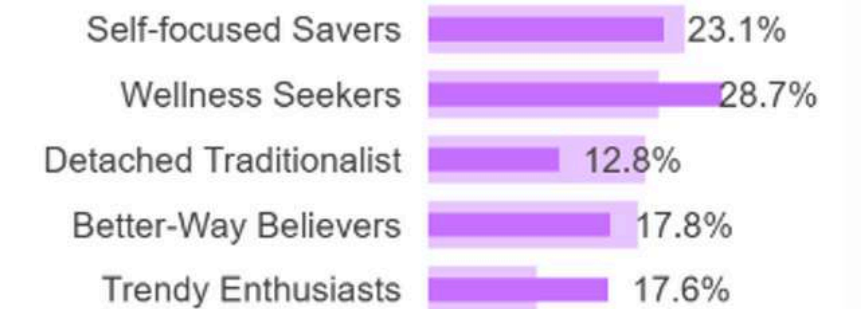
Reasons for Consuming Less



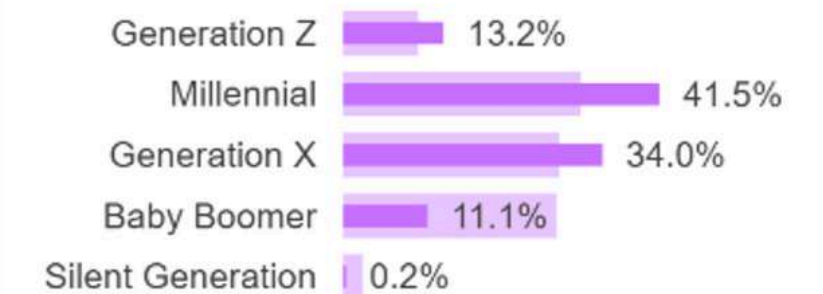
How Decreasing Consumption



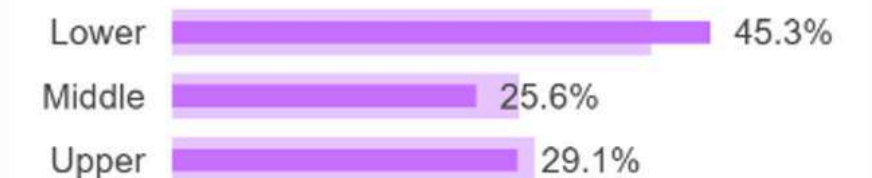
Wellness Persona



Generation



Income Level



**FILTERABLE DATA HELPS YOU FIND THE TRENDS FAST IN BRIGHTFIELD'S
WELLNESS CONSUMER INSIGHTS PORTAL**

This is our **FREE** report

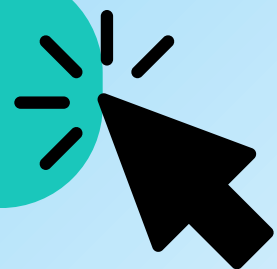
This report includes a small fraction of the data and insights in Brightfield's Consumer Insights and Social Listening for Wellness and CPG brands.

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

- Functional Beverages
 - Protein Powders
 - Fish Oil / Omega 3
 - Energy Drinks
 - Plant-based Products
- & so many more categories!**



Get in Touch!



Stay ahead of all the wellness trends!

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

[Explore Consumer Insights](#)

[Explore Social Listening](#)

