



# RAISING THE BAR FOR BEVERAGES - 2025 UPDATE

What Americans are Drinking this Summer

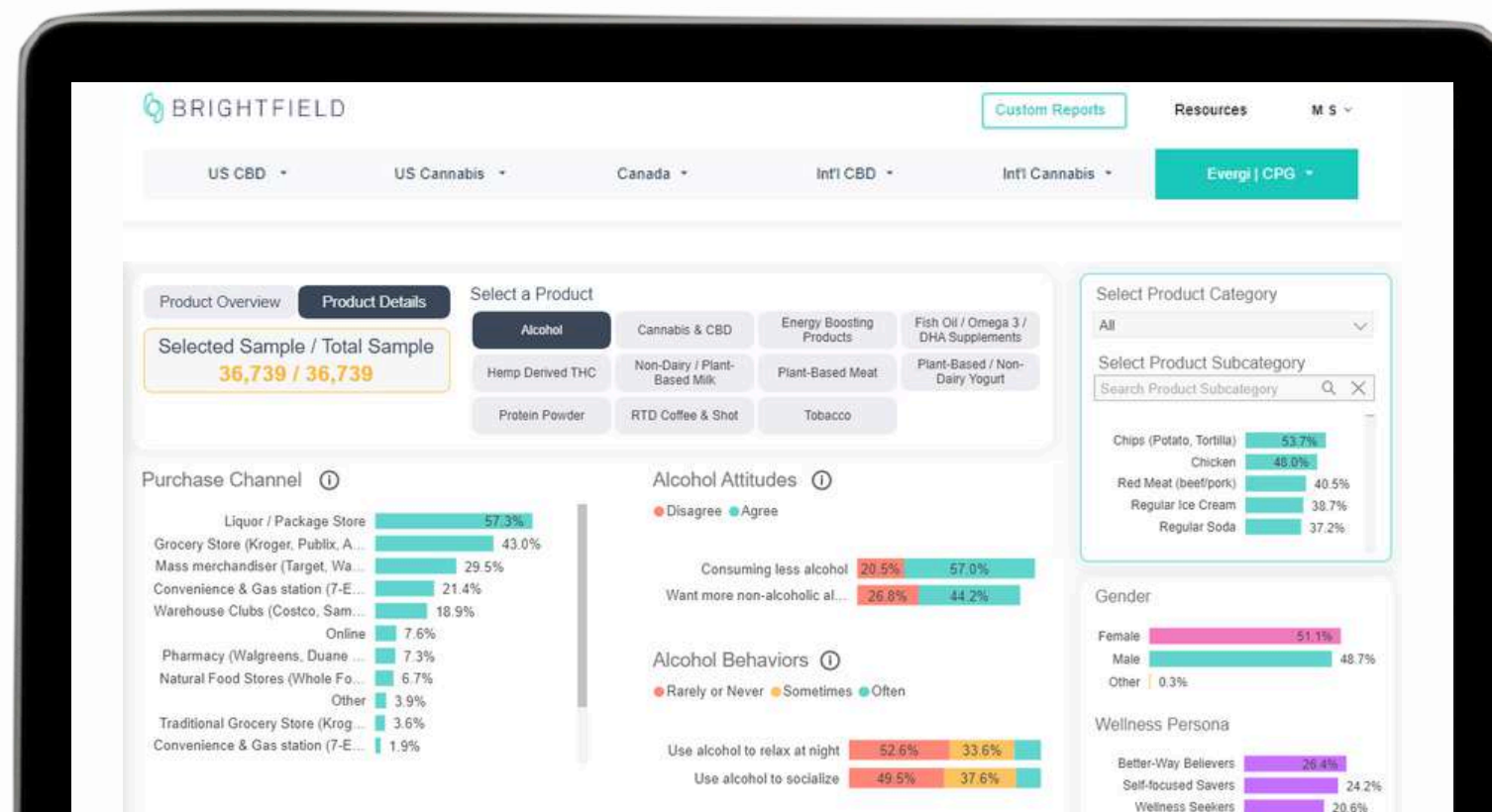
2025



# 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:**

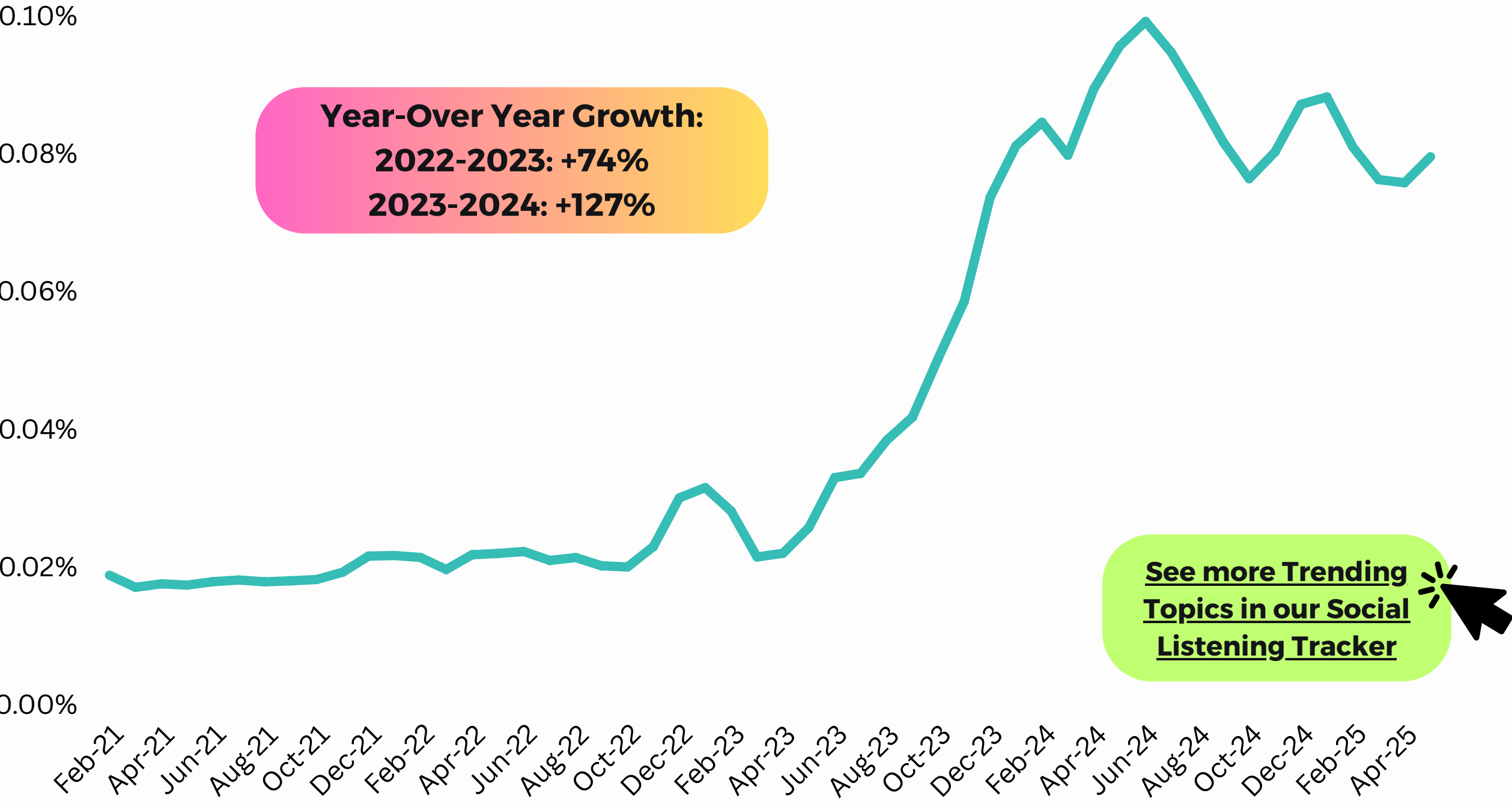
- Alcoholic and NA Beverages
  - Energy-boosting Products
  - Cannabis and CBD
  - Hemp-derived THC's
  - Tobacco
- & so many more categories!**

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# Interest in Alcohol Alts. Booms

The beverage industry is being shaken (not stirred) by consumers' desire to consume less alcohol. With a bigger emphasis on health and disruption in socializing around alcohol, consumers have adopted new drinking habits. Looking at Brightfield Group Social Listening data for the “non-alcoholic drinks” broadly, Conversations exploded in 2023 and 2024 and have remained elevated in 2025.



Source: Brightfield Group; U.S. Wellness CPG Social Listening; June 2025



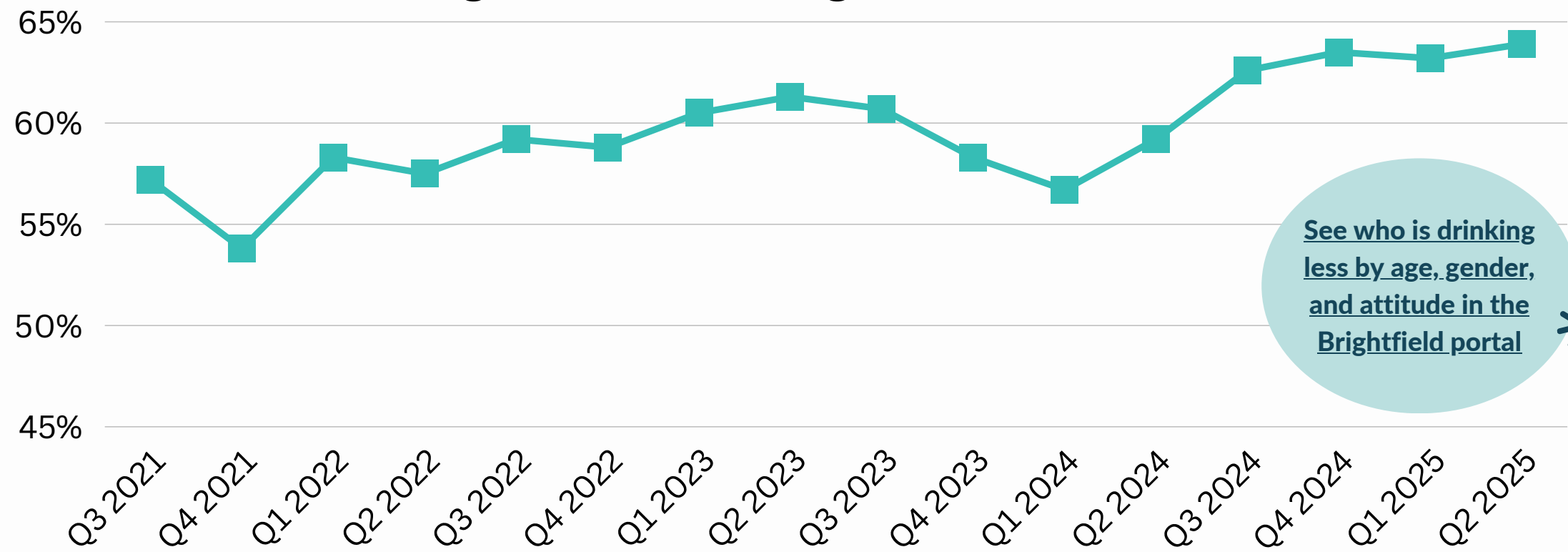


# The Trend: Consumers Say They're Drinking Less Alcohol

Brightfield Group asks consumer quarterly if they are consuming less alcohol than they were previously. When the metric was first tracked in 2021, around 57% agreed with the statement. However, in Q2 2025, this rose to 63% (despite a relatively stable 40% P3M alcohol incidence over the period), driven by members of the Wellness Seeker persona.

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 Q2 2025, **72% say so**.

Agree: Consuming Less Alcohol



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

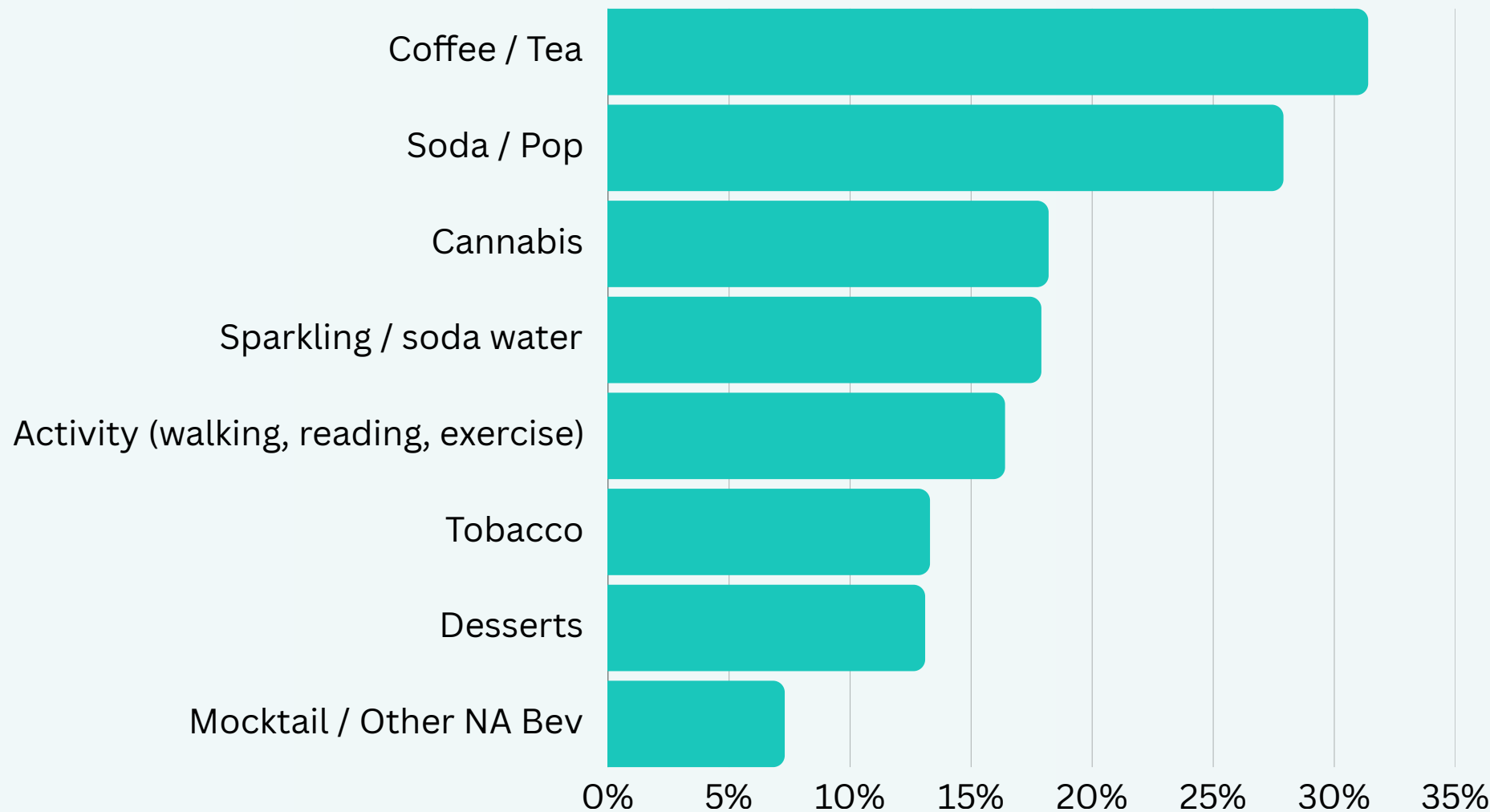
Source: Brightfield Group; Wellness Consumer Insights; Q2 2025

# What They're Swapping In

Despite lots of tailored non-alcoholic options, the main things with which consumers are replacing alcohol are more traditional beverages, such as coffee, tea, and soda. Other products that create mind-altering affects, such as cannabis and tobacco, also rank highly. Meanwhile, just 7% of alcohol reducers report using mocktails/NA beverages and roughly 20% are trying to reduce their alcohol consumption without using any replacement products, highlighting the room that alcohol alternatives have to make further inroads with potential customers.

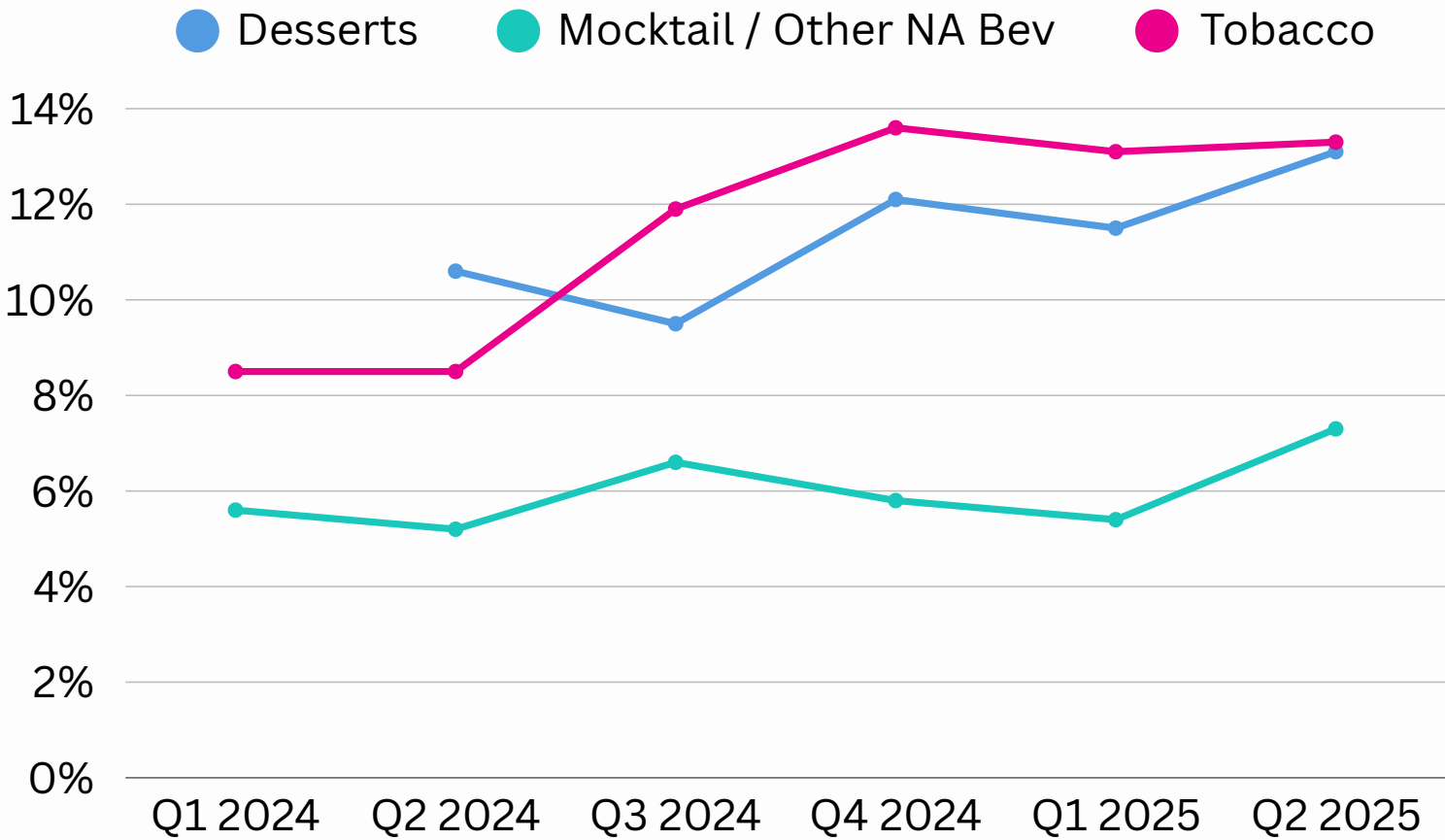
## Alcohol Substitutes

% of Alcohol Consumers Using Beverage as Alcohol Substitute



## Select Substitutes Over Time

% of Alcohol Consumers Using Beverage as Alcohol Substitute



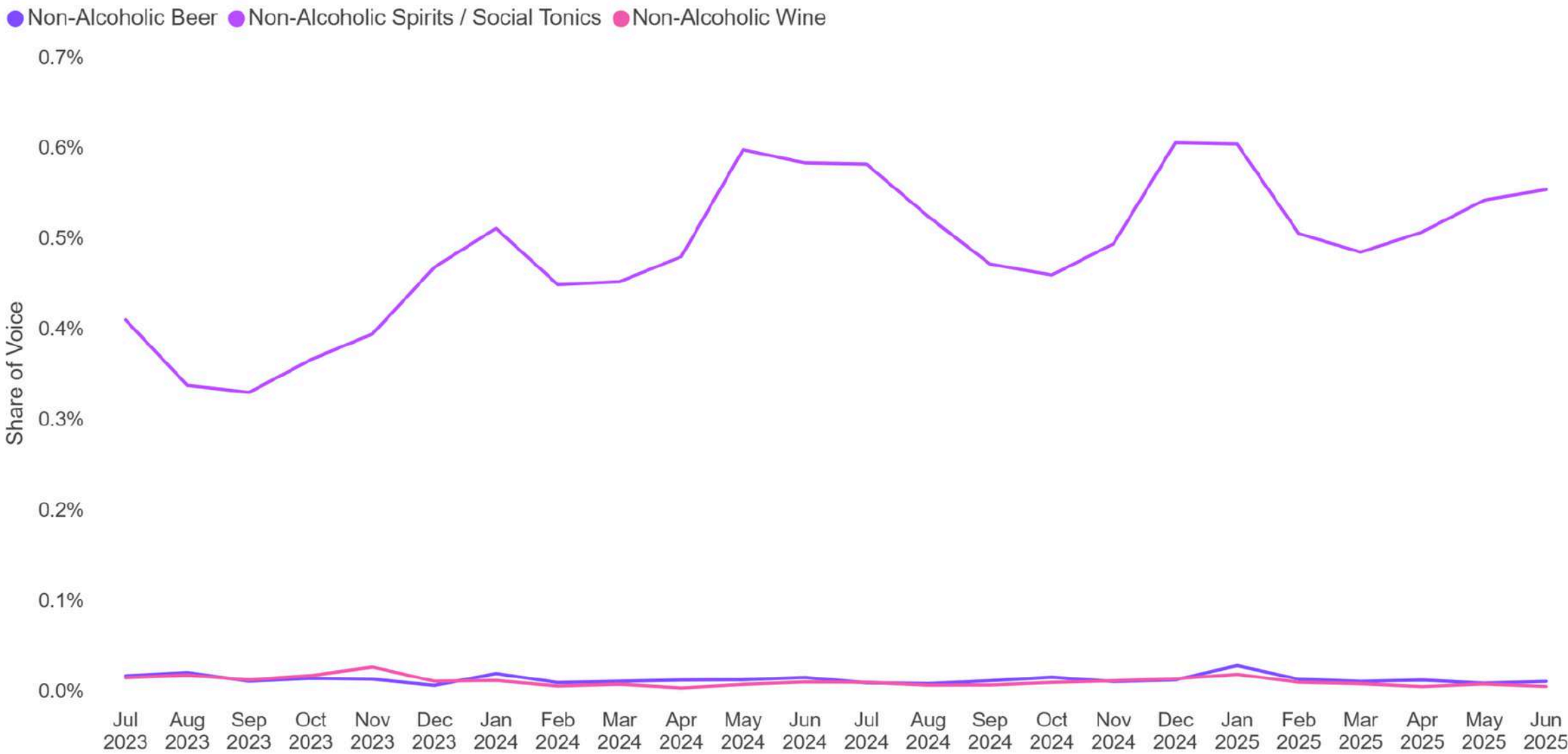
Over the last year, more U.S. adults have reported using tobacco as a substitute for alcoholic beverages while Mocktails/Non-Alcoholic beverages, though still less pervasive, saw solid growth in Q2 2025.

Desserts were added as an option in early 2024 and has had strong and growing performance since, showing how food is becoming a growing alcohol alternative.

Source: Brightfield Group; Wellness Consumer Insights; Q2 2025

# NA Beverage Options

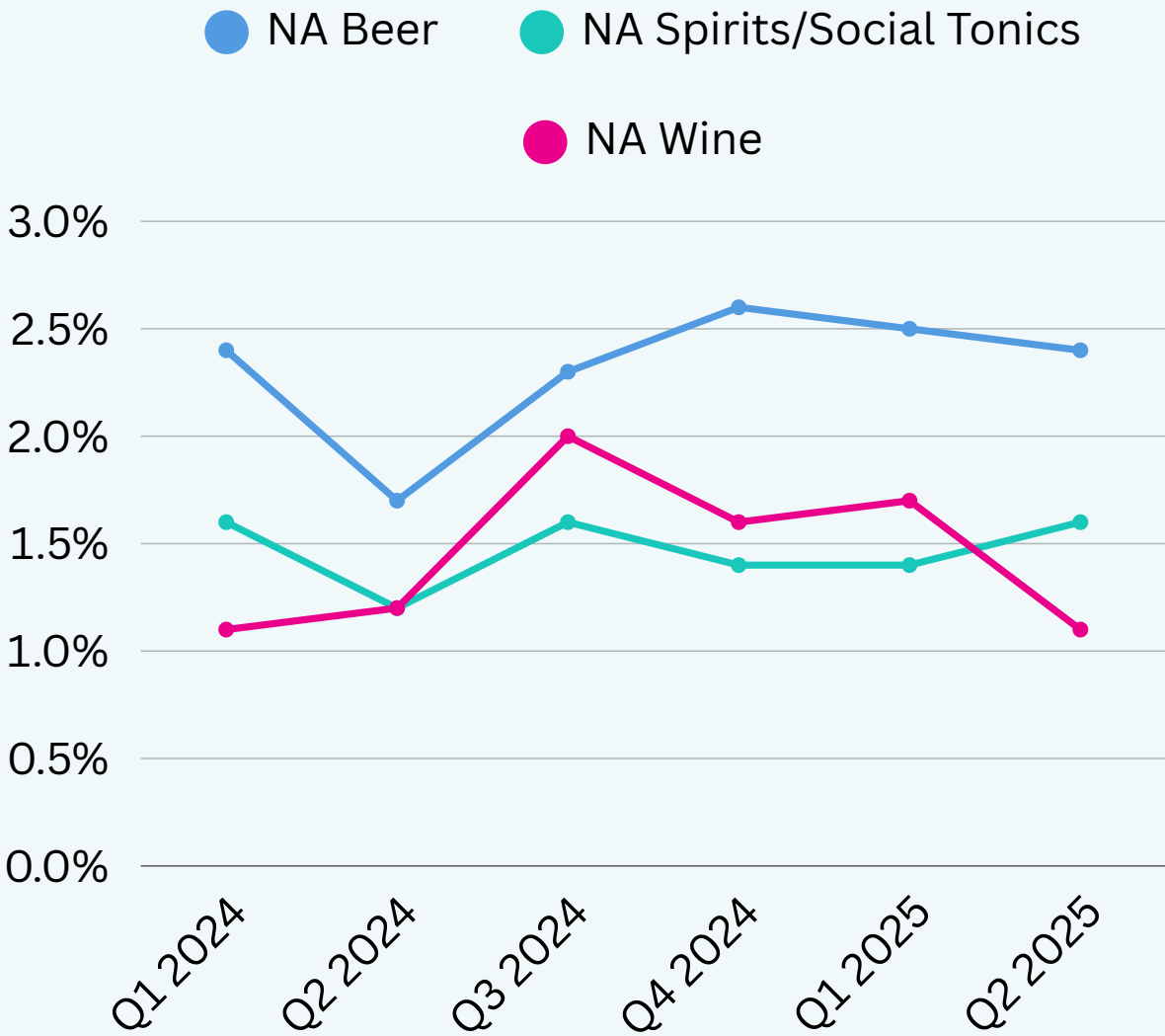
Homing in on products created to be direct alcohol alternatives, non-alcoholic beer is generating the most buzz on social media its share of voice in Brightfield Group Social Listening has been consistently trending upward in recent years, aligning with its leading past 3 month incidence rate. Non-alcoholic wine usage saw a dip in our most recent consumer survey while alternative spirits and social tonics, despite generating less discussion on socials, has maintained a more steady usage rate. With relatively low penetration and high interest from consumers in reducing their alcohol usage, though, these categories have lots of room to explode in the future.



Sources: Brightfield Group; Wellness Consumer Insights; Q2 2025. U.S. Wellness CPG Social Listening, June 2025

## NA Product P3M Incidence

% of Total Sample Population



**FILTER BY NA BEVERAGE TYPE USED OR HUNDREDS OF OTHER METRICS FOR FAST INSIGHTS IN THE WELLNESS CPG CONSUMER PORTAL**

# What's Next for NA Drinks

## From Sober Curious to Mainstream Movement

What began as a niche “Dry January” challenge has grown into year-round cultural shifts, reflected by the consistent uptick in Wellness CPG social listening data. NA options have become staples at social occasions, from summer BBQs to New Year’s parties. Notably, most NA drink buyers still consume regular alcohol, alternating between alcoholic and alcohol-free drinks as part of a “mindful drinking” Moderation is becoming more mainstream rather than the exception, with sober-curious consumers normalizing alcohol alternatives as NA drinks expand beyond the wellness space and become more of a lifestyle and cultural trend.

## The Next Wave: Ritual-First and Multi-Functional Formats

- **Ritual-Driven Formats:** Expect growth in formats that mimic the ceremony of drinking—like aperitif sprays, mood-setting droplets, or multi-sensory experiences pairing sound, scent, and flavor (e.g., Chia’s pre-dinner aperitif, or Hiyo’s “float” ritual positioning).
- **Multi-Need Hybrids:** Brands are layering function on top of alcohol replacement, creating drinks that relax, hydrate, and nourish all at once (e.g., alcohol-free adaptogenic elixirs with electrolytes, collagen, or nootropics).
- **Emerging Crossovers:** Boundaries between supplements, beverages, and even skincare are blurring. Future launches may include “drinkables” co-developed with wellness or beauty brands, or nighttime recovery tonics that cross into sleep, stress, and skin support.

## Functional & Mood-Boosting Alternatives

A key trend in alcohol alternatives is the use of functional ingredients to mimic the relaxing or uplifting effects of a drink – without the alcohol. In addition to adaptogens and botanicals, Natural relaxants like ashwagandha, L-theanine, and magnesium (for calm or stress relief) and nootropic herbs and mushrooms (for focus or mood) are increasingly common. These functional alcohol alternatives let consumers unwind or lift their spirits in a healthier way, blurring the line between supplement and social drink. On the other side of the spectrum, hemp-derived THC drinks have been gaining traction because of their distinct psychoactive effects and growing in their mainstream distribution. Brightfield covers Hemp THC extensively - [read the recent deep dive on Hemp THC drinks](#) and reach out if you want more information on this emerging trend!





# Stay ahead of beverage trends!

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



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