

CONSUMER INTELLIGENCE REPORT

The Nicotine & Alternatives Shift

The trends shaping the industry

How tobacco and nicotine consumers are migrating — and which emerging categories are capturing their attention, spending, and loyalty.

Kate Stevenson Floyd · Brightfield Group · Data: Wellness CPG Consumer Survey H2 2025 (N=11,244) · Social Listening Tracker (100M+ conversations)

Your nicotine customers are already exploring **alternatives**

69%

of tobacco/nicotine consumers use a non-nicotine alternative when their preferred product is unavailable

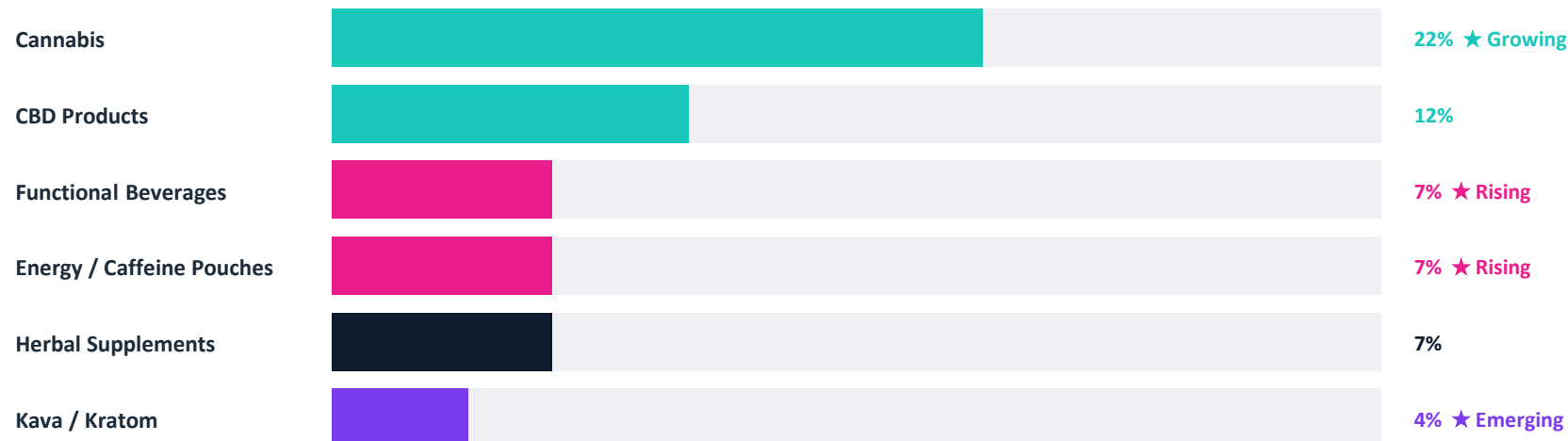
32%

of U.S. adults use cannabis — larger than tobacco/nicotine (25%)

"Consumers are buying outcomes — not products."

— Brightfield Group, TPE 2026

TOP NON-NICOTINE SUBSTITUTES (When Preferred Product Unavailable)



What this means for the industry: The shift is not about format loyalty — it's about outcomes (energy, focus, relaxation, mood). Alternatives that nail these need states are taking share.

PART 1

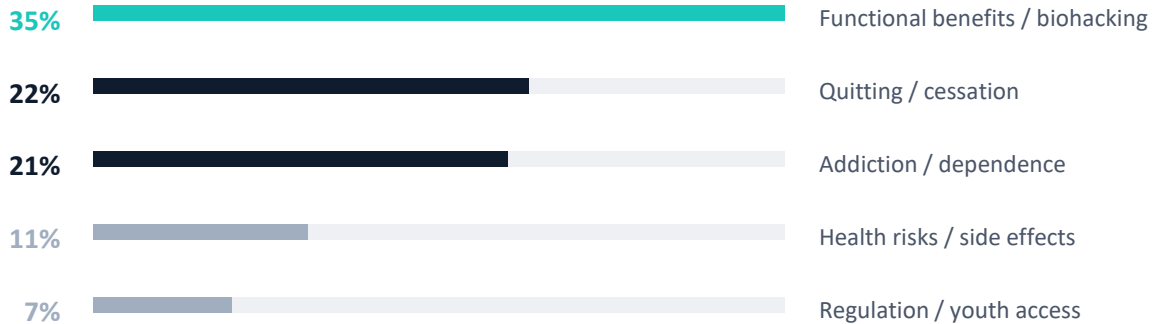
Modern **Nicotine**

Nicotine is becoming a **performance conversation**

+400%

growth in nicotine social conversations over the past 2 years

SHARE OF VOICE BY THEME



WHAT THE SIGNALS MEAN FOR BRANDS

- **Biohacking is the #1 theme** — at 35% share of voice, surpassing health risks and cessation. Nicotine is being folded into the self-optimization conversation.
- **"Clean nicotine" is the fastest-rising signal** — tobacco-free and clean-ingredient language growing at nearly 3× the prior period, mirroring clean-label trends in food and wellness.
- **Pouches are the breakout format** — second only to vapes in product discussion. Thin competitive share of voice = real differentiation opportunity.
- **The pouch conversation is splitting** — an "energy and focus pouch" cluster is separating from standard nicotine delivery, with caffeine as a key functional add-in.

"Nicotine is no longer just a habit-related conversation. It's becoming part of the optimization and performance conversation."

— Brightfield Group Social Listening Analysis, TPE 2026

Pouches vs. vapes: two archetypes, two completely different need states

★★★ 3-Star Trend · Growing

The Optimizer

Nicotine Pouch Consumer

74%

Male

51%

Upper income

50%

Millennial

+210%

Social growth

- 87% are first to try new diets or products
- 88% believe functional foods equal medicine
- 85% rely on products for energy boosts
- Sees nicotine as a performance tool, not a habit

Brand message: Achievement · Optimization · Clean ingredients

★★ 2-Star Trend · Plateauing

The Stress-Manager

Nicotine Vape Consumer

52/48%

Male / Female

25%

Gen Z (vs 15% avg)

5.8%

P3M purchase reach

+248%

Social growth

- Over-indexes on anxiety management and emotional regulation
- Stress relief and energy recovery are primary drivers
- More gender-balanced and broadly distributed by income
- Sees nicotine as a coping mechanism, not optimization

Brand message: Relief · Comfort · Harm reduction

PART 2

The **Alternatives** Migration

Every emerging alternative is competing on the **same four outcomes**



Energy & Focus

Cognitive lift, productivity, athletic performance. The #1 functional need state across nicotine, caffeine, kratom, and energy pouches.

+85% Social Growth



Mood & Wellbeing

Emotional regulation, happiness, social ease. Driving kava, cannabis, adaptogens, and functional beverage adoption.

+96% Social Growth



Relaxation & Calm

Stress relief without impairment. Kava and functional beverages are primary beneficiaries as alcohol alternatives.

+56% Social Growth



Cognitive Health

Memory, clarity, brain support. Fastest-growing cluster, fueling nootropic pouches, mushroom supplements, and smart drinks.

+98% Social Growth

Winning brands identify which need state they own — and deliver it more credibly than the competition, regardless of category. Format is secondary; outcome is everything.

Four categories gaining traction with **nicotine's core consumer**

Kava

+45% Social Growth

Cousin to kratom, growing rapidly in beverage format. Social tonic bars as an alcohol-alternative occasion. 62% of kava consumers workout regularly, 52% identify as athletes.

Need states: Relaxation · Social · Ritual

Functional Beverages

7% of Nicotine Consumers Already Using

Adaptogens, mushrooms, nootropics. Fastest-growing format for mood and cognitive support. Positioned against energy drinks and alcohol — with "cleaner" credentials.

Need states: Mood · Focus · Clean energy

Kratom

★★★★ Social Momentum

Small but vocal community. Morning-use ritual — "my kratom instead of coffee." MIT 45 and OPMS lead brand mentions. Positioned on energy + focus, not cessation.

Need states: Energy · Focus · Morning ritual

Non-Nicotine Pouches

★★★ Brightfield Trend Score

Energy, nootropic, and caffeine pouches growing among Urban Dwellers and Trendy Enthusiasts. Pouch format is familiar to nicotine users — lowest friction alternative.

Need states: Energy · Focus · Clean caffeine

Common thread: All four address energy, focus, relaxation, or mood — the same need states that drive nicotine use. Ritual-driven options show the strongest retention, mirroring nicotine's stickiness.

The alternatives consumer is **younger, more affluent, and more experimental**

HOW THEY DIFFER FROM ALL TOBACCO/NICOTINE USERS

+9%

More likely to be upper income vs. all tobacco/nicotine users

Millennial

Over-index vs. Boomer and Gen X among alternatives users

60% Male

Consistent across cannabis, kava, kratom, and pouches

Urban

Growth concentrated in urban dwellers and "Trendy Enthusiasts"

"The alternatives consumer isn't quitting nicotine — they're expanding their toolkit for self-optimization."

— Brightfield Group, TPE 2026

PSYCHOGRAPHIC STANDOUTS: ENERGY POUCH CONSUMER VS. GENERAL POPULATION

Functional foods = medicine

55%

88%

First to try new diets / products

35%

87%

Currently training / athlete

31%

64%

Prefers alternative medicine

45%

72%

Plant-based = healthier

53%

81%

General population Energy pouch consumer over-index

These consumers respond to efficacy-forward, science-backed, clean-label positioning. Early adopters who amplify on social — disproportionately important for brand awareness.

Four things every CPG brand should take from this data

01

Nicotine is bifurcating — and both sides are opportunities

Pouches serve self-optimizing Millennials (achievement messaging). Vapes serve stress-driven Gen Z (relief messaging). Winning brands speak to one archetype clearly — not both vaguely.

02

69% of tobacco consumers are already exploring — the door is open

These consumers are not loyal to a category — they're loyal to an outcome. Any brand that credibly delivers energy, focus, relaxation, or mood has a path in.

03

The clean-label and biohacking wave is reshaping what nicotine means

"Clean nicotine," tobacco-free positioning, and performance framing are the fastest-growing signals. Brands ignoring this are speaking a language consumers are leaving behind.

04

The next breakout is ritual-driven — kava, kratom, functional pouches

Categories building a daily ritual show the strongest retention, mirroring nicotine's stickiness. Kava (+45%), functional beverages, and non-nicotine pouches are the three to watch.

WANT TO GO DEEPER?

We can build a **custom model** for your category.

Whether you're a brand entering the alternatives space, a retailer evaluating your shelf, or an investor tracking category momentum — Brightfield's consumer + social intelligence gives you the signal before it's obvious.

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WHAT WE TRACK

100K+ Consumer Panel

5,000+ U.S. adults surveyed quarterly since 2020. 200+ product categories. Census-balanced with social opt-in matching.

100M+ Social Conversations

AI-tagged real-time social listening across TikTok, Instagram, and X. Filterable by persona, demographics, and brand.

Predictive Trend Model

1–5 star scoring combining social momentum, survey incidence, and early-adopter signals to identify breakout categories.