

## WAVE 1

A new “cheers”:

# Consumer trends shaping the future of “drinking”

## Key takeaways from an evolving alcohol landscape

The way people consume alcohol is changing. Driven by a bigger focus on health and wellness, economic pressure, and the rise of alcohol alternatives, alcohol consumption is shifting from habit to intentional choice.

Toluna conducted a quantitative study among 2000+ US-based alcohol consumers to uncover current consumption trends, factors impacting shifting patterns, and what it all means for brands. Below are some key findings.

### 1.

#### Alcohol perceptions are changing



- Alcohol is **moving from “habit” to “conscious choice”** territory, with consumers approaching it with more intentionality. This signals a broader lifestyle evolution that prioritizes balance and wellness, 41% of alcohol barriers are health related.

### 2.

#### Mental stress and challenges are driving new drinking dynamics

- 58%** of alcohol consumers **feel negatively** about the world, among which **Gen Z** and **women** report to be **most affected**.
- Emotional stress is influencing alcohol consumption habits.** This opens the door for brands to connect through human-centered storytelling.
- Gen Z’s rising anxiety and prioritization of well-being** are reshaping drinking occasions. Relaxing and unwinding, rather than going out, are becoming key moments driving alcohol consumption.

### 3.

#### Gen Z is especially sensitive to the introduction of tariffs

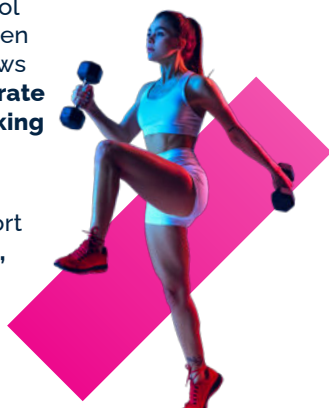


- 64%** of **Gen Z** reported that they would adjust their **alcohol purchasing decisions based on tariffs, due to having less disposable income.**

## 4.

### Gen X is cutting back (but not cutting out)

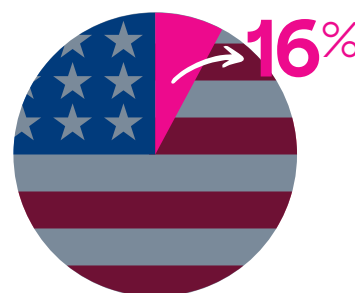
- **Health concerns, aging, and hangovers** emerge as key barriers to consumption among Gen X.
- Still significant alcohol beverage drinkers, Gen X's consumption skews towards more **moderate and traditional drinking moments**.
- Brands have the opportunity to support Gen X with **premium, low-alcohol, or functional drink options** that fit their desire for enjoyment without compromise.



## 5.

### The 16% of Americans who are GLP-1 users are reshaping consumption patterns

- **56% of GLP-1 users** claim to have reduced or eliminated alcohol from their lives.
- There is a strong tendency to **adopt alcohol alternatives and non-alcoholic options** among this group.
- GLP-1's growth signals a **major category disruption**.



## 6.

### Non-alcoholic and functional drinks are gaining momentum

**66%**

expect **non-alcoholic options** to gain popularity.

**54%**

of non-alcoholic drink consumers cite **health as their reason** for consumption.

- Gen Z and millennials over-index for non-alcoholic adoption (20% and 18% respectively).

## 7.

### THC curiosity are expanding the "vice" market

**66%**

are open to **THC-infused beverages**

**53%**

are interested in **wellness/functional drinks**.

- Consumers are increasingly seeking healthier alternatives to alcohol that don't cause hangovers.



Learn more in our [blog post series](#).

The future of drinking is being redefined. Stay ahead of the curve.  
Contact [adriana.sousa@toluna.com](mailto:adriana.sousa@toluna.com) to learn how.