The Consumer Trends Shaping Adult Beverages

Executive Summary

Key Findings

30%
above early-2000s volume levels; alcohol category remains resilient

76%
of all LDA+ adults drink alcohol

74%
of Gen Z of legal drinking age drink alcohol

+50%
of total share of alcohol servings (%LBE) is represented by Beer and Beyond Beer

Consumer Trends Shaping the Alcohol Category

Moderation
Moderation supports an active lifestyle. Drinkers are maintaining frequency while consuming fewer drinks per occasion and adding no-alcohol drinks to the mix.

Experience Economy
Consumers are increasingly seeking meaningful connection through live experiences like sports, music, and travel.

Premium & Affordability
Consumers are making sharper trade-offs as cost pressures continue, but affordability does not always mean choosing the cheapest option.

Flavors & Convenience
Flavor and limited-edition innovations are fueling curiosity and giving people new ways to explore flavor in convenient ways.

Trust & Familiarity
As decision-making becomes more complex and trust erodes, familiar brands increase confidence and reduce risk.

Introduction

The world is changing rapidly—and so is socializing

Understanding how consumer behaviors, attitudes, and cultural trends are changing is critical to growth in the alcohol category.

Ipsos, IWSR, and AB InBev partnered to examine the forces shaping the category and influencing consumer choice today. Through category analysis, macro force identification, global cultural exploration, and attitudinal and behavioral studies, the research explores what motivates consumers of legal drinking age.

The result is a clearer view of how beverage alcohol is evolving against broader shifts in culture and consumption, and where the industry may find its next opportunities for growth.

Reclaiming agency in an age of uncertainty

Consumers are facing a global environment with unpredictable shifts. Because of this, people are reclaiming control of things within their power and prioritizing how they spend their time and money. That same desire for agency is reshaping beverage alcohol, as people make more deliberate choices about when, where, and what they drink.

Alcohol consumption is evolving

Consumers are increasingly seeking options for a balanced lifestyle including no- and low-alcohol, gluten-free, low-carb, low-calorie, and sugar-free options. At the same time, they are seeking new flavors and varieties with ready-to-drink (RTD) options like canned cocktails, hard seltzers, and flavored malt beverages. Consumers are making more intentional decisions about how alcohol fits into their lives, creating a more nuanced consumption landscape.

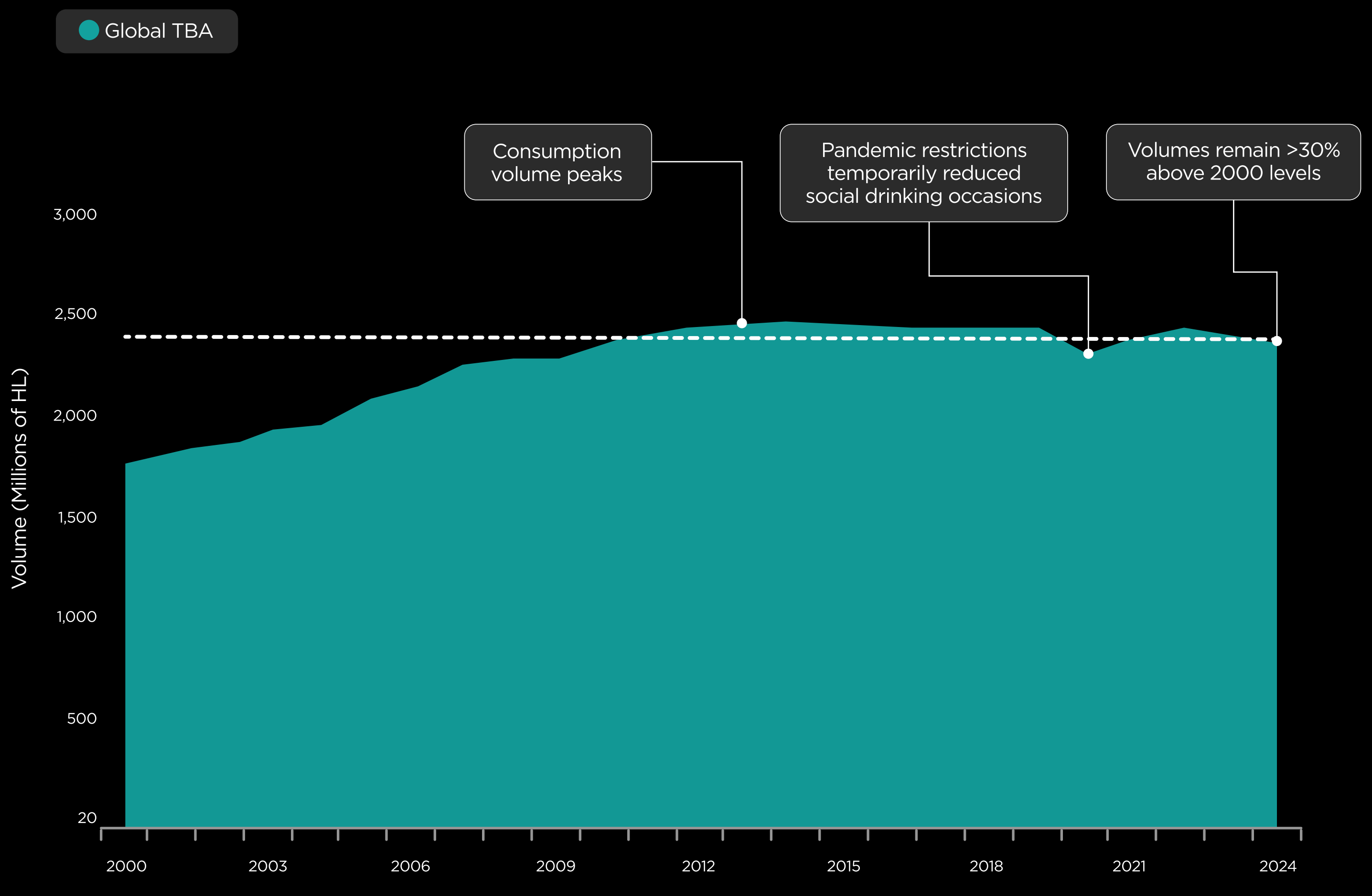
Within this context, Beer and Beyond Beer are gaining share. Frequency remains broadly stable, and Gen Z of legal drinking age engagement is increasing, even as consumers drink less per occasion. Together, these trends illustrate how the alcohol category is evolving, with growth opportunities emerging as consumer preferences and category dynamics continue to shift. The following sections explore both lenses to identify where growth may emerge.

The State of Beverage Alcohol

Volume remains resilient.

Alcohol category volume remains 30% above early-2000s levels, reflecting continued consumer engagement, though with a slight decline in 2021.

CONSUMPTION VOLUME
Total Beverage Alcohol (TBA) Volume (mHL)



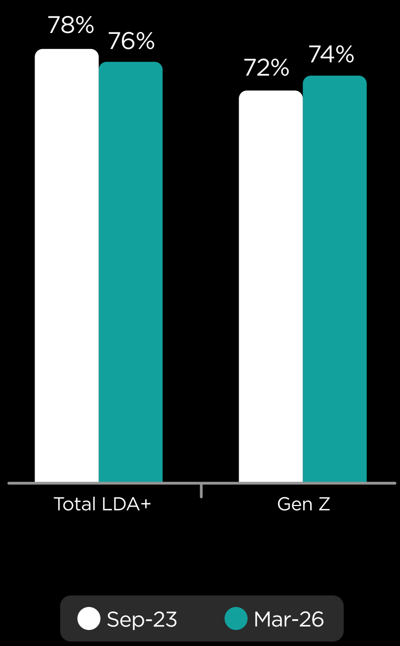
Participation and frequency of consumption remain stable overall, with Gen Z of legal drinking age engagement increasing.

Participation remains high across beverage alcohol categories.

Drinking frequency overall remains stable. The participation gap between Gen Z of legal drinking age and the wider population of drinkers appears to have disappeared entirely, with no significant difference across markets.

MOST LDA+ ADULTS STILL DRINK ALCOHOL

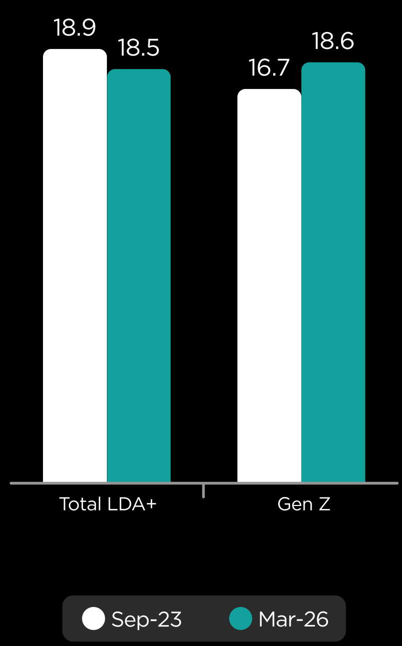
Share of LDA+ adults consuming alcohol in the past 6 months



Note: Base: Total LDA+ adults in T15 markets.

DRINKING FREQUENCY REMAINS STABLE

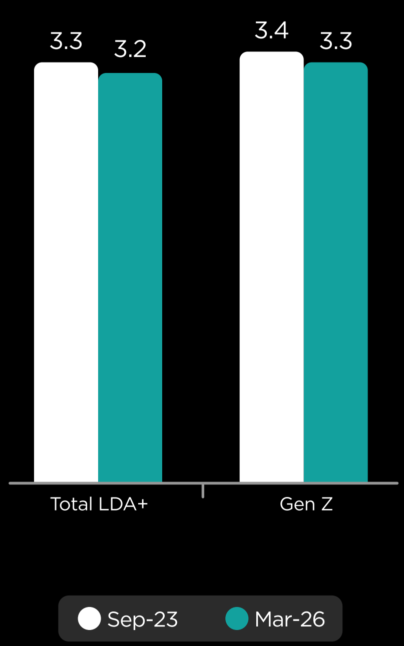
Average number of drinking occasions per month



Note: Excludes no-alcohol. Base: Total LDA+ adults in T15 markets.

CONSUMERS ARE DRINKING SLIGHTLY LESS PER OCCASION

Average number of servings per drinking occasion



Beer and Beyond Beer are gaining share within a stable alcohol mix.

Beer and Beyond Beer have grown from approximately 46% of total alcohol servings (%LBE) in 2019 to more than 50% in 2026, with further gains projected through 2035. Beer alone has also increased its share, rising from approximately 44% to about 47% over the same period.

This growth reflects consumers seeking out meaningful social experiences, as well as demand for convenience, affordability, and accessible ways to explore new flavors and formats, particularly across beer, RTDs, RTD cocktails, and flavored malt-based beverages.

SHARE OF TOTAL ALCOHOL SERVINGS (% LITER BEER EQUIVALENT) – INCLUDES NO-ALCOHOL

2026 Global Alcohol Category & Cultural Trends

The major trends shaping the beverage alcohol category amid evolving consumer choices and behaviors:

MODERATION	Consumers are making more intentional drinking choices, supported by advances in technology and innovation.
EXPERIENCE ECONOMY	As the world becomes more digital, people are seeking authentic social connections.
PREMIUM & AFFORDABILITY	Consumers are prioritizing purchases and experiences that deliver emotional and functional value.
FLAVORS & CONVENIENCE	Consumers are seeking bold flavors and convenient formats that feel culturally grounded and authentic.
TRUST & FAMILIARITY	Consumers are looking for brands that feel familiar and transparent.

Moderation

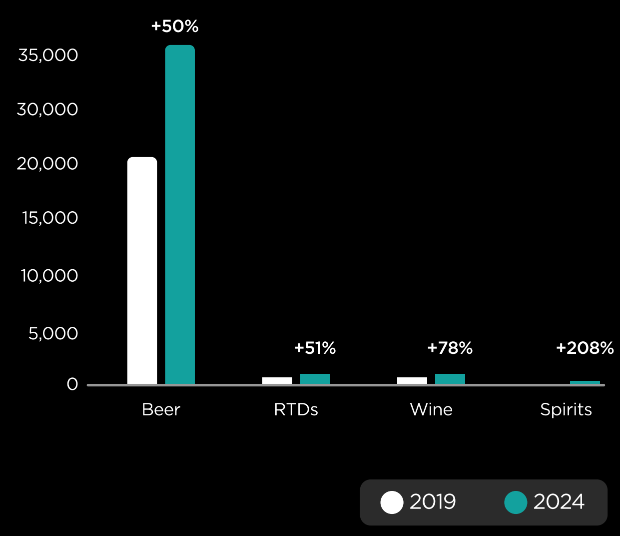
Consumers are maintaining a focus on balance and quality – paying more attention to the alcohol content of what they are drinking and choosing options and occasions that align with their personal goals.

~93% of global no-alcohol volume is beer, more than 30 times larger than any other category

79% want more control over health decisions (+4ppt from 2013)

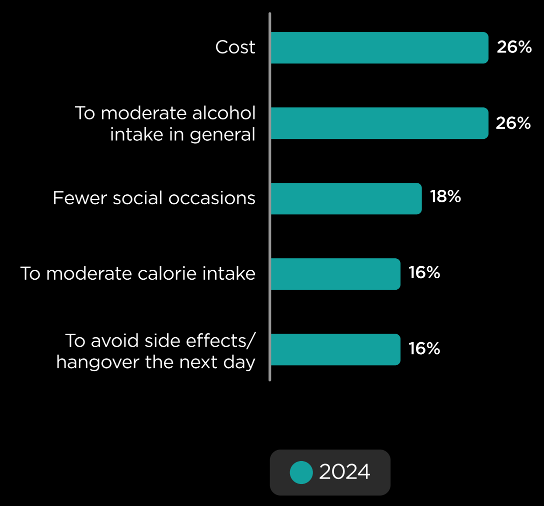
Beer leads no-alcohol, accounting for ~93% of global volume

Volume of No-Alcohol ('000s hL)



Cost, moderating alcohol intake, and overall wellbeing are increasingly driving consumption habits

Reasons for Reduced Consumption: Percent of Consumers



TREND IMPLICATIONS

Intentional Intake: Consumers are becoming more deliberate about what they drink, when they drink, and how alcohol fits into daily life.

Functional Choices: Demand is growing for lower calorie, lower alcohol options, as well as functional choices that give consumers more flexibility.

Experience Economy

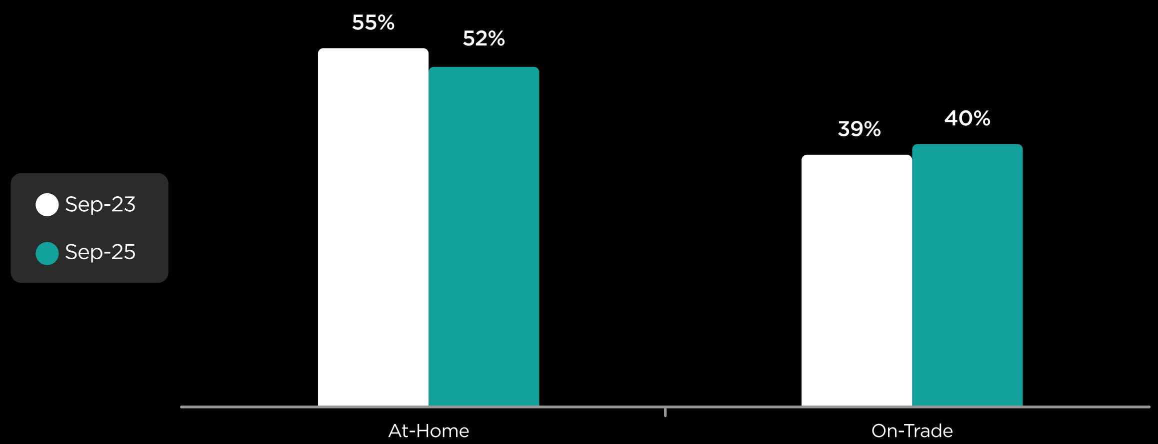
As digital life expands and attention feels more fragmented, people are becoming more selective about the experiences they choose.

Social connection remains a leading reason consumers drink, with 35% citing social occasions as their main motivation.

1B+ people expected to attend live music and sports events worldwide for the first time (up 20% vs. 2019)

On-trade consumption remains stable, as consumers seek in-person social experiences

Percent Alcohol Consumption by Channel



Note: Based on T15 markets. Remaining volume is classified as other.

TREND IMPLICATIONS

Social Connection & Experiences: Consumers are seeking experiences and moments that feel memorable and worth the time or spend.

Digital Social Spaces: As socializing increasingly moves across digital and hybrid spaces, brands need to find credible ways to connect online communities with real-world occasions.

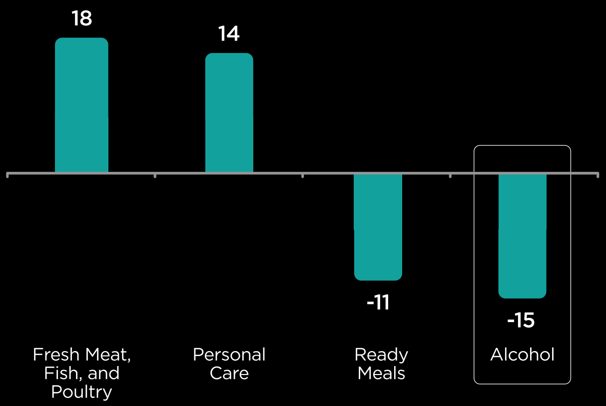
Premium & Affordability

Consumers are cutting back in some areas while still spending on moments that feel meaningful or worth the upgrade.

Premium+ alcohol volume grew 5.0% annually from 2014 to 2024, with Premium+ beer growing even faster at 5.6%.

Alcohol faces spending pressure

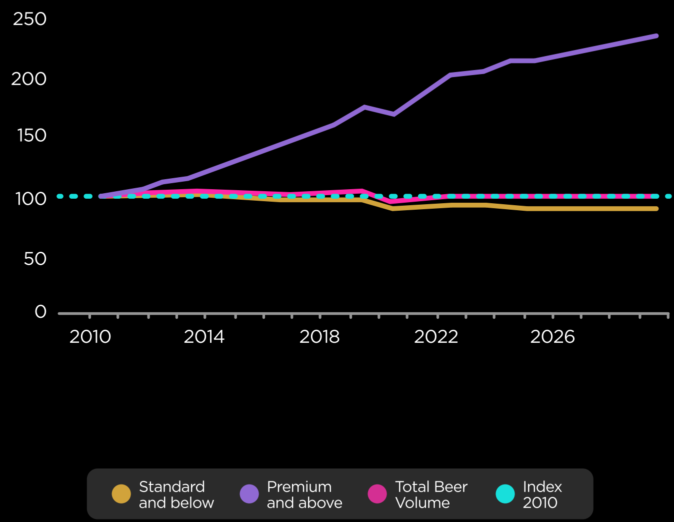
Net Change in Spend Scores by Category in the Past Six Months, T15 Markets (Sep 2025)



Note: Net change = % spending less - % spending more.

Total beer volumes by price tier

Tier Indexed vs. 2010



TREND IMPLICATIONS

Selective Indulgence: People are still prioritizing premium choices when they feel accessible and emotionally rewarding, especially for everyday occasions.

Financial Trade-Offs: As consumers scrutinize spending, they are supporting brands that demonstrate value through quality, experience, and relevance.

Flavors & Convenience

Consumers are looking for more variety, but they want discovery to feel easy and authentic.

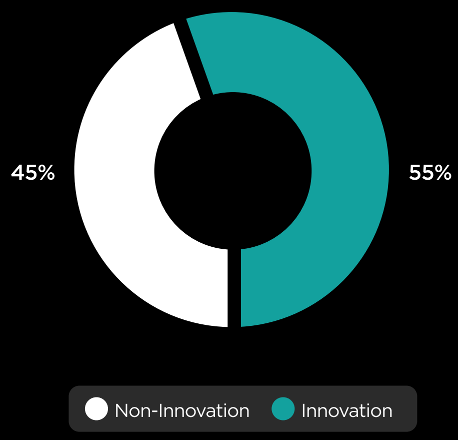
Innovation drove more than half of beverage alcohol retail value growth over the past decade.

52% cite flavor as the top driver of RTD choice

39% cite convenience as a top 3 driver of choice for buying RTDs

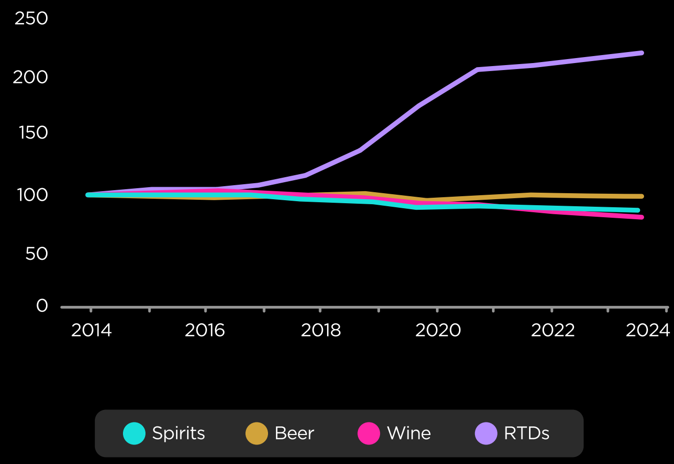
Innovation is driving over half of BevAlc value growth

Contribution of Innovation to Total Retail Sales Value Growth (2015-2024)



RTDs are the fastest growing BevAlc category

Category Volume Indexed to 2014 (2014-2024)



TREND IMPLICATIONS

Authentic Discovery: Consumers are seeking new flavors and formats with an emphasis on convenience and variety.

Influence & Curation: More people are turning to influencers and trusted communities to discover new flavors and innovations, driving consumer choice.

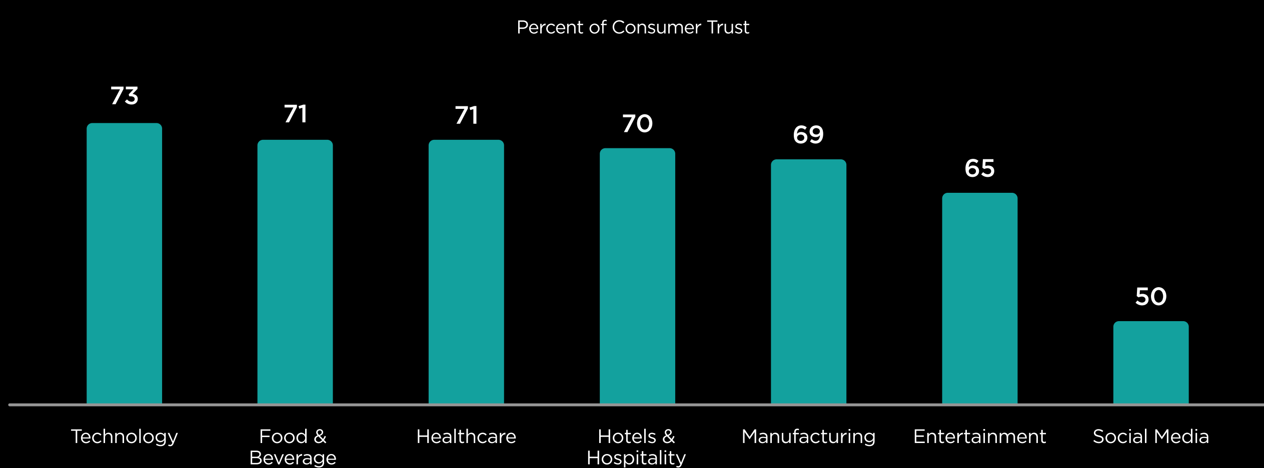
Trust & Familiarity

Consumers are navigating a growing number of choices, claims, and information sources. In beverage alcohol, trusted brands offer credibility amid new product innovations and occasions.

77% of global consumers are more likely to trust a new product from a brand they already know, up 4 percentage points since 2019

72% of global citizens say they trust brands, up significantly from 56% in 2022 and higher than the number who say they trust institutions (56%)

Food and beverage remains among the most trusted industries



Note: Food & Beverage includes farming/fishery, food and beverage manufacturers, grocery/supermarket/food retail businesses, restaurants/fast food, and brewing and spirits.

TREND IMPLICATIONS

Proof Over Promises: Consumers increasingly expect brands to back up their claims with transparent, verified, and visible evidence.

Algorithmic Uncertainty: As AI and algorithms shape discovery, brands need to preserve a sense of human connection and authenticity.

This report was created by Ipsos and IWSR in collaboration with AB InBev.

SOURCES

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