

INNOVATING TO IMPACT

dentsu

US EDITION

HOW US CONSUMERS' RELATIONSHIP WITH DRINKING IS EVOLVING

JULY 2026



PART OF THE DENTSU CONSUMER NAVIGATOR SERIES

ABOUT THIS STUDY

Survey Methodology

- The survey was conducted by dentsu via Toluna, an online research panel.
- Administered on May 3rd, 2026.
- Distributed among a random sample of 1,000 U.S. respondents, 18 years of age or older.
- Controls for nationally representative weighting across age, gender, region, race and ethnicity (using the latest publicly available U.S. numbers).



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TOP CONSUMER INSIGHTS

ALCOHOL CONSUMPTION IS PREVALENT, BUT MOSTLY CASUAL

7 in 10 adult Americans drink alcohol, but only a third do so on a regular basis. Both Women and Gen Zers tend to drink on rare or social occasions, but not on a day-to-day basis.

NOT DRINKING ALCOHOL IS MAKING AN IMPACT ON HOW OFTEN NON-DRINKERS DINE OUT AND ON THEIR OVERALL SPENDING ON BEVERAGES

Non-drinkers usually settle for water or soft drinks or alternatively splurge on specialty coffees. Therefore, Non-Drinkers feel they save considerably both when dining and grocery shopping. At the same time, they feel that premium alcohol-free options are available to them if they want to splurge.

DRINK DISCOVERY IS MOST OFTEN OCCURRING ON SOCIAL MEDIA OR IRL, WHEREAS THE USE OF AI FOR BEVERAGE RECOMMENDATIONS IS STILL VERY LIMITED

Nonetheless, consumers expect AI to be the technology that disrupts shopping for beverages in the near future. Interest is driven by savings and value considerations.

MOST AMERICANS CHOOSE THEIR BEVERAGES BASED ON THE ENTERTAINMENT THEY ARE PAIRING THEM WITH

However, gifting and celebrating special occasions are the factors that lead drinkers to splurge on alcohol the most.

3 IN 10 AMERICANS SPLURGE ON BEVERAGES IF THEY ARE HOSTING GUESTS IN THEIR HOMES

When it comes to going out, 2 in 3 Drinkers already know what beverage they will order before leaving the house. Brand trust and price are the criteria that influence how drinkers order the most.

RETAILER SITES/APPS AND FOOD DELIVERY APPS ARE THE DIGITAL CHANNELS CONSUMERS USE THE MOST FOR BEVERAGE PURCHASES

When it comes to in-person shopping, in-store experiences and knowledgeable staff are the key to winning the business of those who drink alcoholic beverages on an occasional basis.

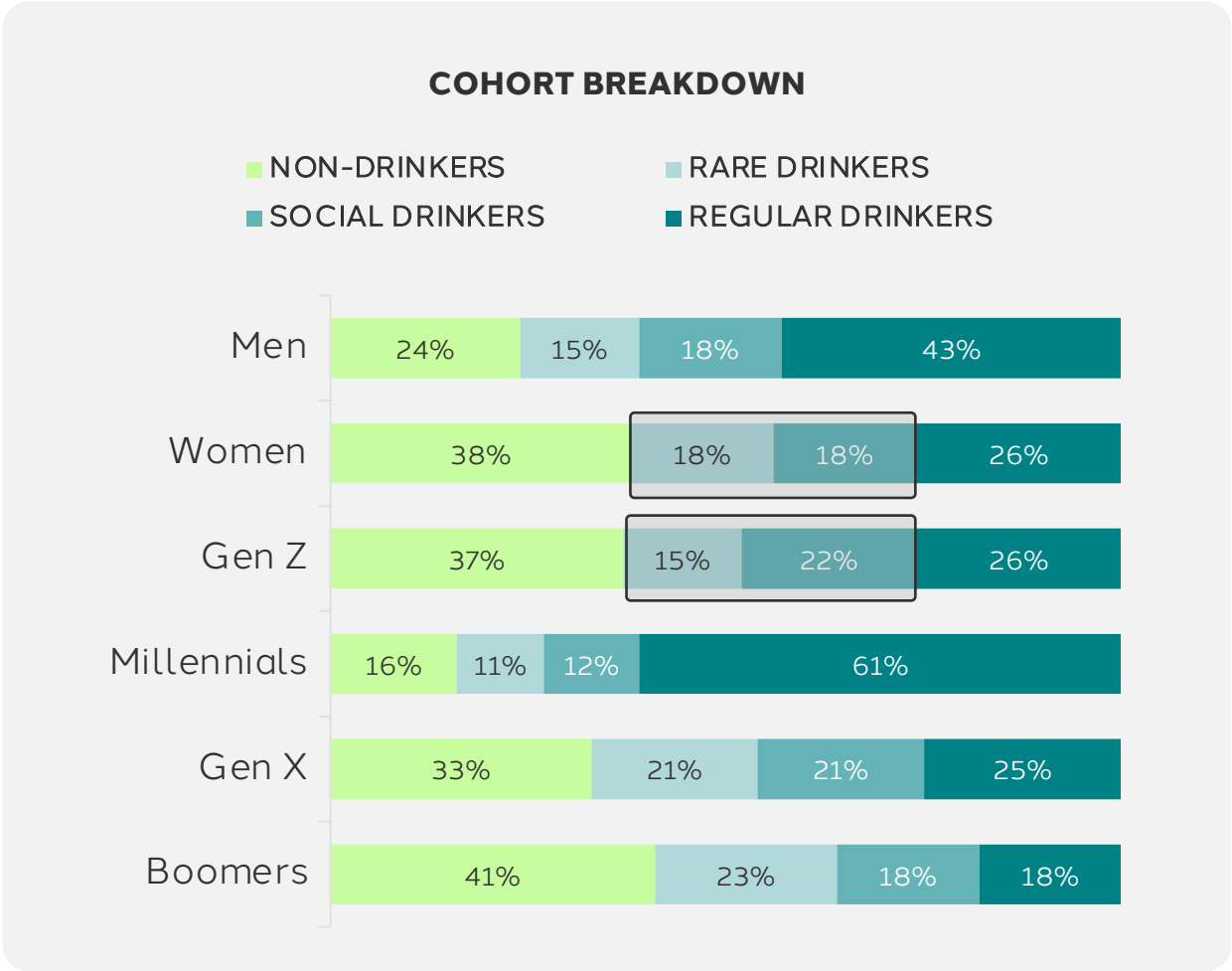
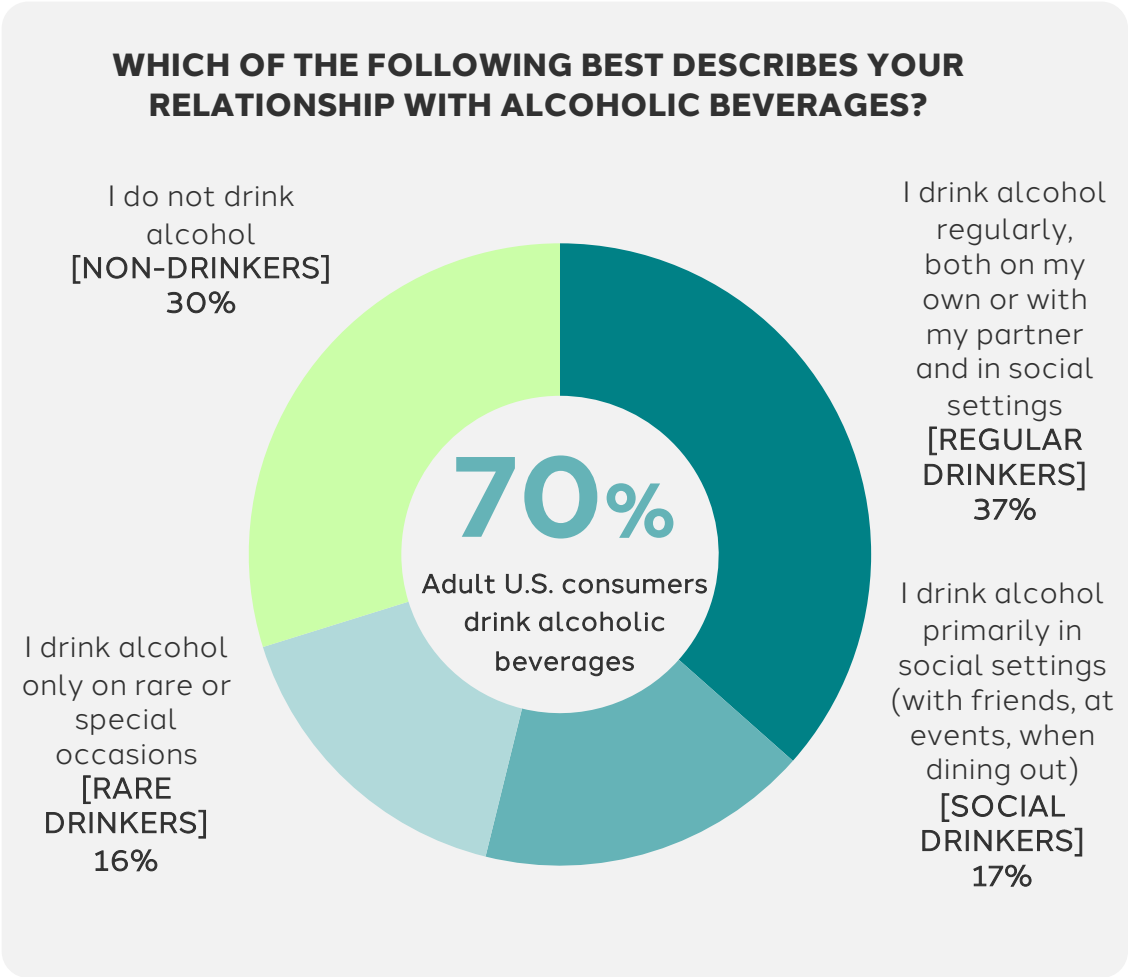


HOW US CONSUMERS' VIEWS ON DRINKING AND SOCIALIZATION ARE CHANGING



7 IN 10 ADULT AMERICANS DRINK ALCOHOL, BUT ONLY A THIRD DO SO ON A REGULAR BASIS

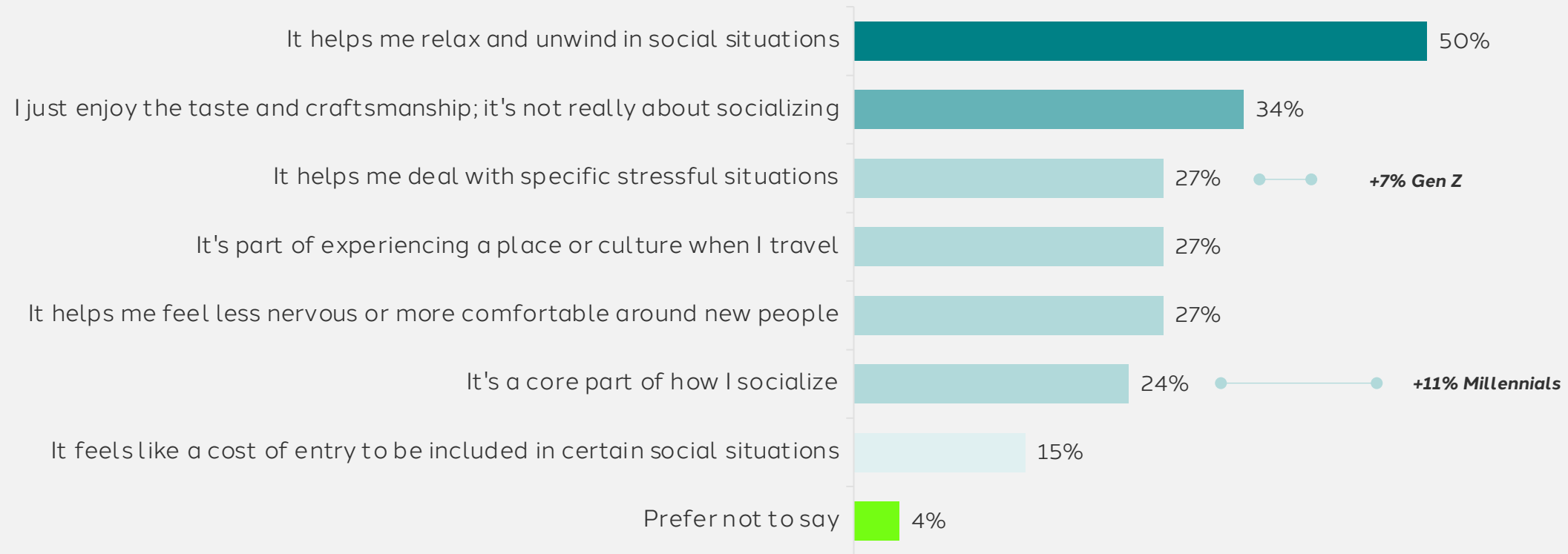
Both Women and Gen Zers tend to drink on rare or social occasions, but not on a day-to-day basis.



THOSE WHO DRINK SEE ALCOHOL AS A SOCIAL LUBRICANT THAT HELPS THEM CONNECT AND RELAX

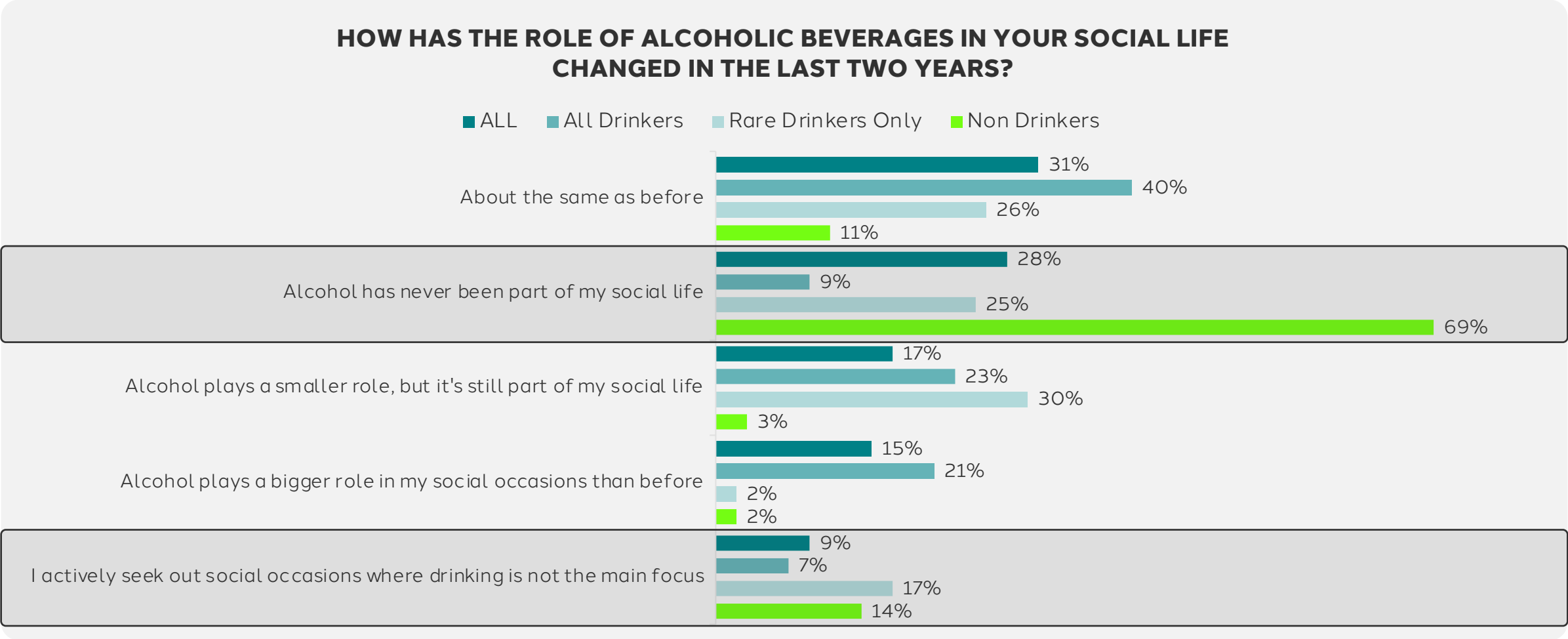
Gen Z over-index on turning to it to deal with stressful situations, while Millennials are more likely to say it plays a core role in their social activities.

WHICH ROLE DOES ALCOHOL PLAY IN YOUR LIFE?



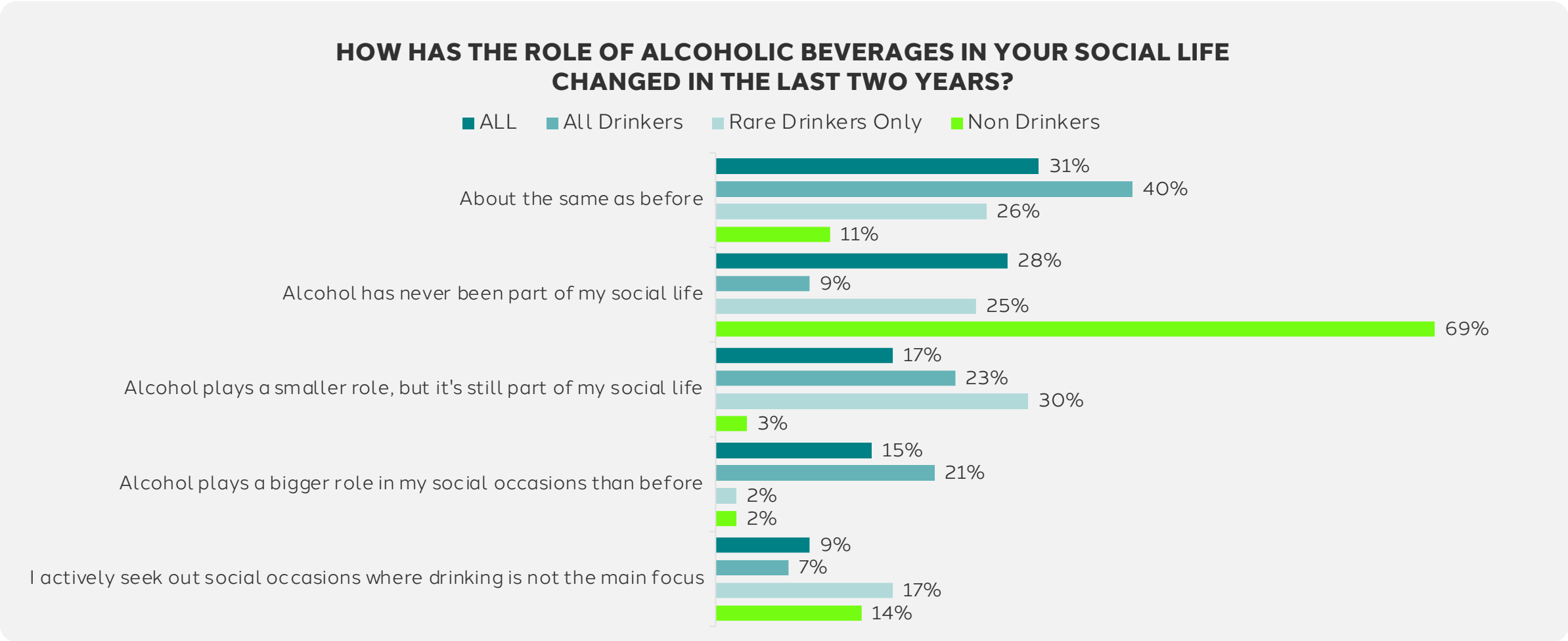
ALMOST 3 IN 10 AMERICANS CLAIM THAT ALCOHOL HAS NEVER PLAYED A ROLE IN THEIR SOCIAL LIFE

Expectedly, this selection is driven by Non-Drinkers. However, they are not significantly more likely to seek alcohol-free social occasion than Drinkers.



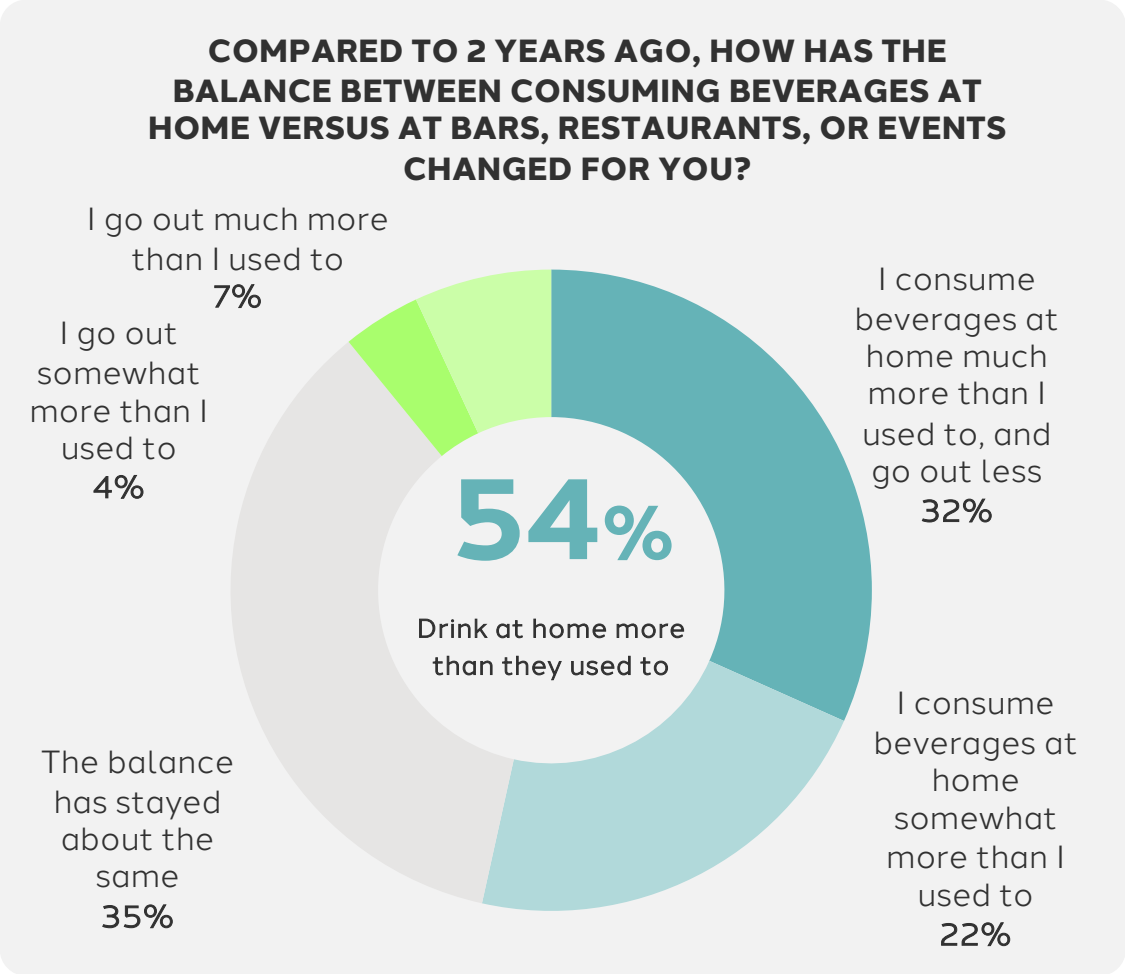
FOR DRINKERS, ALCOHOL STILL PLAYS A SIGNIFICANT (IF NOT EVEN GREATER) ROLE IN SOCIAL OCCASIONS

Non-Drinkers are more likely to claim that alcohol has never played an important role.



MOST CONSUMERS SAY THEY ARE CONSUMING BEVERAGES AT HOME (VS GOING OUT) MORE THAN THEY USED TO

Non-Drinkers over-index significantly on going out more, signaling that the affordability of alcoholic beverages in restaurants and bars is a factor.



WHERE AUDIENCES OVER-INDEX	
DRINKERS	CONSUME BEVS AT HOME SOMEWHAT MORE (118i)
RARE DRINKERS	BALANCE STAYED THE SAME (116i)
NON-DRINKERS	GO OUT MUCH MORE (257i)

GEN Z	CONSUME BEVS AT HOME SOMEWHAT MORE (119i)
MILLENNIALS	CONSUME BEVS AT HOME SOMEWHAT MORE (118i)
GEN X	CONSUME BEVS AT HOME MUCH MORE (119i)
BOOMERS	BALANCE STAYED THE SAME (114i)



IMPLICATIONS FOR MARKETERS

RETHINK SOCIAL RITUALS WHEN CATERING TO SPECIFIC COHORTS

Brands outside of the beverages category should consider how, especially for Gen Zers, social gatherings are less often predicated around alcohol consumptions than they used to be, and update their depictions of them in advertising accordingly, or, if they are offering products and experiences connected to socialization, expand their brand partnerships to include alcohol-free alternatives.

POSITION ALCHOLIC BEVERAGES AS A PERSONALIZED EXPERIENCE ENHANCER

Drinkers still see consuming alcohol as a significant part of going out and socializing, but those who drink less frequently want to move away from the notion that partaking in it is a 'cost of entry' to be included in a social ritual. Reframe your alcoholic products' messaging so they are portrayed as a perk that elevates the individual's experience of a social gathering, their status within it (perhaps showing different audiences enjoying different product variants) vs. something everybody needs to agree on.

HIGHLIGHT HOW STAYING AT HOME CAN BE TURNED INTO A RITUAL

With consumers staying home more than they used, brands need to show that rituals connected to their products don't need to be relegated to social gatherings and dining out. For instance, De Longhi launched [this](#) creative campaign to highlight how the coffee made by its home machines is on par with that enjoyed in boutique coffee shops.



HOW NON-DRINKERS FEEL ABOUT ALCOHOL-FREE EXPERIENCES



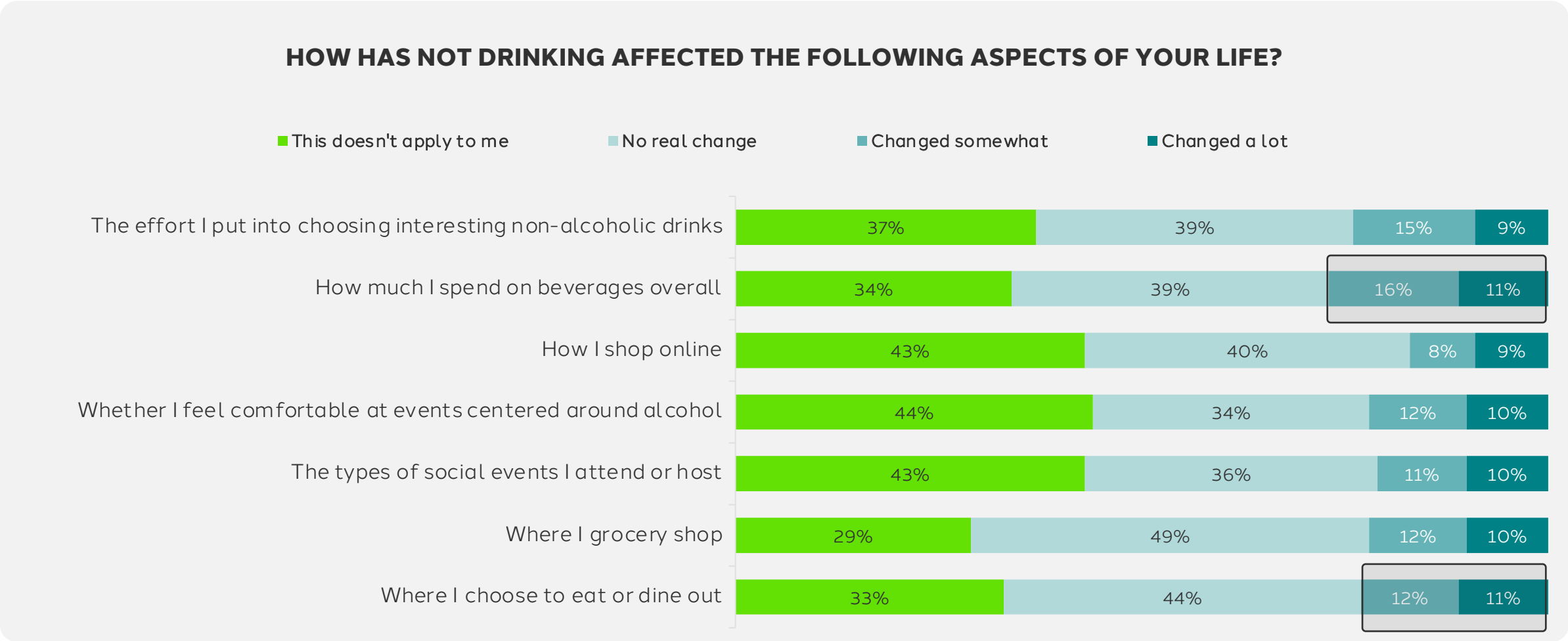
THOSE WHO DO NOT DRINK ALCOHOL WERE EITHER NEVER INTERESTED IN IT OR DO SO FOR WELLNESS REASONS

Boomers over-index on saying they don't feel pressured to drink when socializing and therefore don't.

WHICH OF THE FOLLOWING BEST REFLECT THE REASONS WHY YOU DO NOT DRINK ALCOHOL?



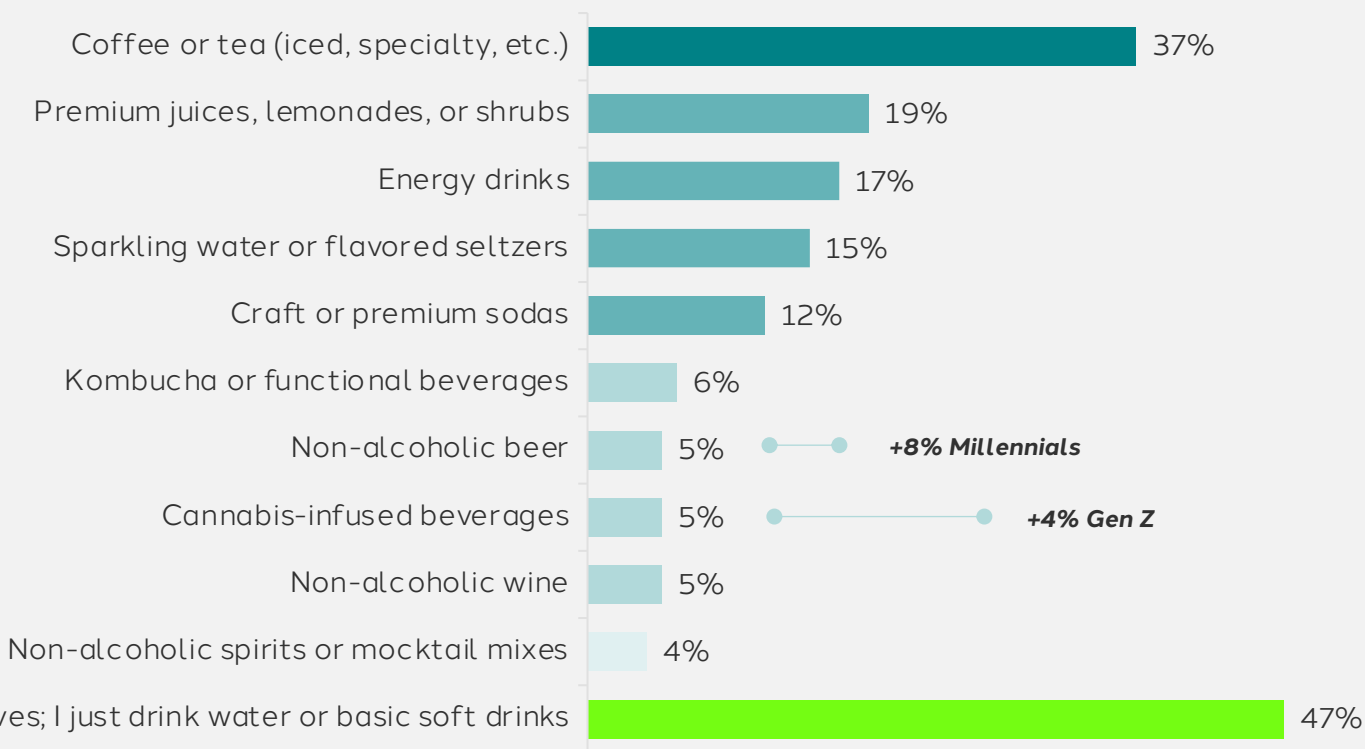
NOT DRINKING ALCOHOL IS MAKING AN IMPACT ON HOW OFTEN NON-DRINKERS DINE OUT AND ON THEIR OVERALL SPENDING ON BEVERAGES



NON-DRINKERS USUALLY SETTLE FOR WATER OR SOFT DRINKS, OR ALTERNATIVELY SPLURGE ON SPECIALTY COFFEES

Millennials are more likely to drink alcohol free alternatives, while Gen Zers turn to cannabis-infused beverages.

WHICH OF THE FOLLOWING NON-ALCOHOLIC BEVERAGES DO YOU PURCHASE ON A REGULAR BASIS?



THEREFORE, NON-DRINKERS FEEL THEY SAVE CONSIDERABLY BOTH WHEN DINING AND GROCERY SHOPPING

At the same time, they feel that premium alcohol-free options are available to them if they want to splurge.

AS A NON-DRINKER, TO WHAT EXTENT DO YOU AGREE WITH THE FOLLOWING STATEMENTS?



NON-DRINKERS GENERALLY TRUST THERE WILL BE OPTIONS MADE AVAILABLE FOR THEM WHEN THEY ATTEND SOCIAL EVENTS

2 in 10 consumers tend to bring beverages to contribute to parties they are invited to.

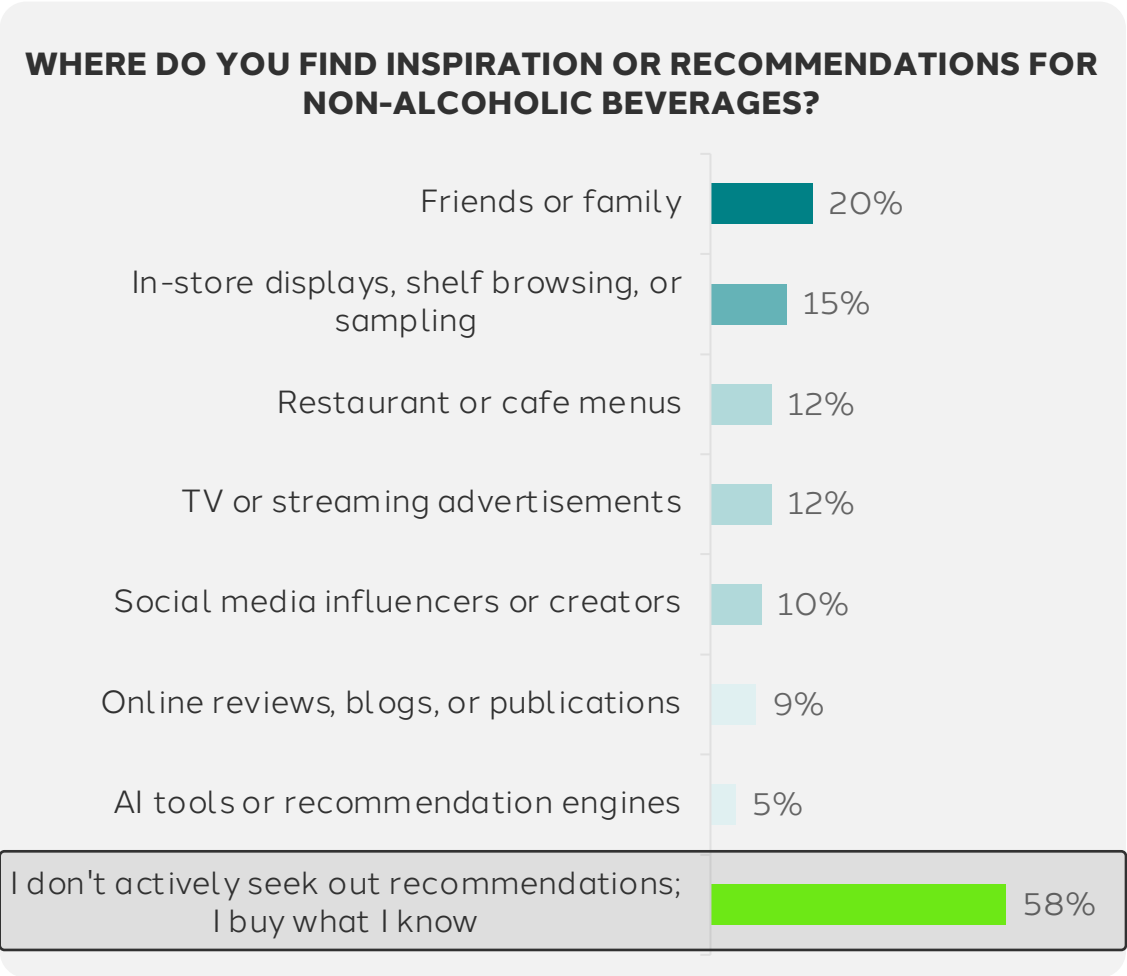


WHERE AUDIENCES OVER-INDEX	
DRINKERS	BRING MY OWN BEVERAGES (125i)
RARE DRINKERS	I COORDINATE WITH THE HOST (121i)
NON-DRINKERS	I JUST ENJOY WHAT'S THERE (213i)
GEN Z	I COORDINATE WITH THE HOST (121i)
MILLENNIALS	BRING MY OWN BEVERAGES (135i)
GEN X	I DRINK WHAT THE HOST PROVIDES (111i)
BOOMERS	I JUST ENJOY WHAT'S THERE (213i)



MOST NON-DRINKERS CONTINUE BUYING TRUSTED BRANDS AS OPPOSED TO SEEKING FOR BEVERAGE RECOMMENDATIONS

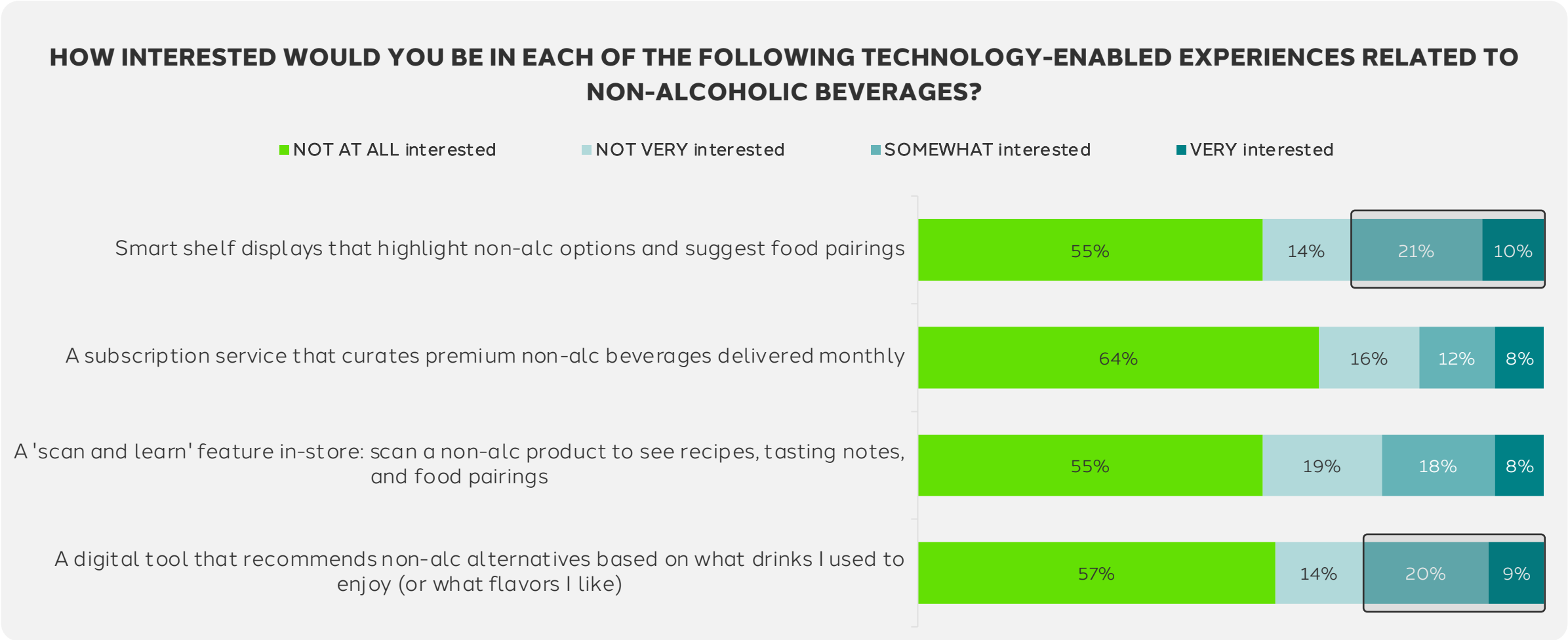
Among recommendations, friends and family and in-store experiences are used the most.



WHERE AUDIENCES OVER-INDEX	
MEN	TV OR STREAMING ADVERTISEMENTS (133i)
WOMEN	No significant over-indexation
GEN Z	ONLINE REVIEWS OR BLOGS (130i)
MILLENNIALS	TV OR STREAMING ADVERTISEMENTS (158i)
GEN X	SOCIAL MEDIA INFLUENCERS (130i)
BOOMERS	IN STORE DISPLAYS (140i)



NON-DRINKERS ARE INTERESTED IN DIGITAL AND IN-STORE TOOLS THAT CAN PROVIDE RECOMMENDATIONS BASED ON PREFERENCES AND PAIRINGS



IMPLICATIONS FOR MARKETERS

POSITION ALCOHOL FREE ALTERNATIVES AS A WELLNESS-FUN COMBO

As the growing Non-Drinker cohort increasingly sees that alcohol consumption is no longer expected at social gatherings, highlight how your brand's alcohol-free offerings can provide wellness benefits without taking anything away from fun experiences enjoyed with your loved ones.

HIGHLIGHT HOW SAVING ON BEVERAGES CAN OPEN UP BUDGET TO PURSUE OTHER INTERESTS

Brands outside of the beverages category should consider how to position not drinking alcohol not only as a healthy and responsible habit, but also as a savings opportunity that consumers should take advantage of to enjoy other, more memorable recreational activities (like buying collectable products you get to keep or enjoying once in a lifetime dining, travel, or entertainment experiences).

EDUCATE CONSUMERS ON PREMIUM ALCOHOL-FREE OPTIONS

Non-Drinkers are still quite reliant on basic alternatives to alcoholic beverages: water, pop, coffee. There is still work done on educating them with regards to how sophisticated some of the premium alcohol-free alternatives and how they can be paired with high-quality meals and special occasions.



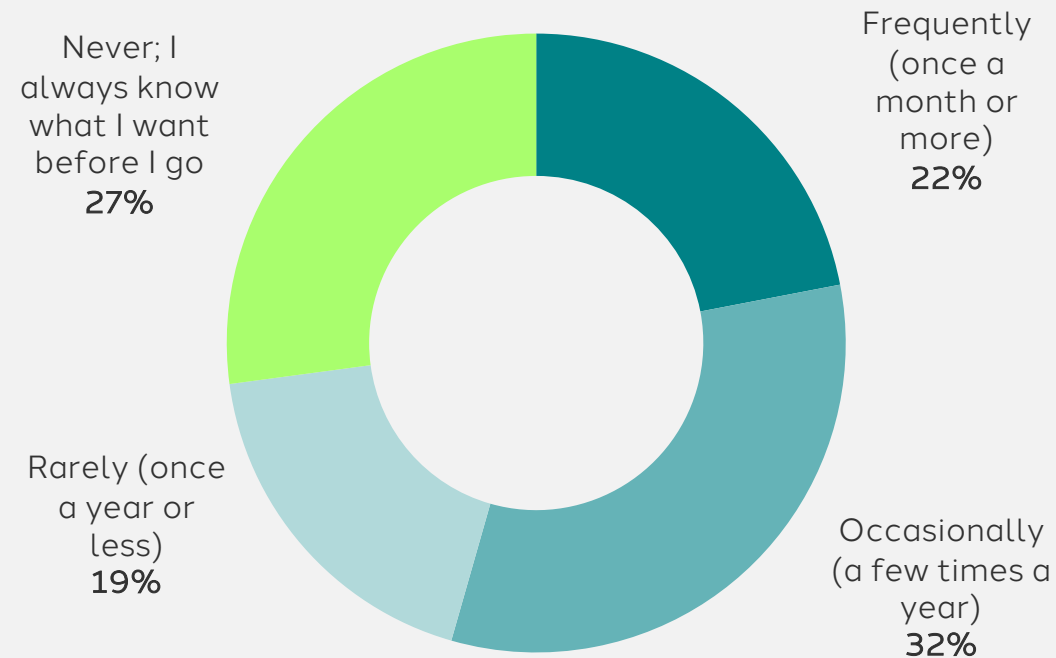
HOW DRINK DISCOVERY IS EVOLVING IN THE AGE OF AI



MOST CONSUMERS ALREADY HAVE A PRODUCT IN MIND WHEN GOING OUT TO BUY BEVERAGES

Millennials are the exception as they over-index on making frequent visits without knowing what to buy already.

HOW OFTEN DO YOU VISIT A STORE THAT SELLS BEVERAGES SPECIFICALLY TO BROWSE OR EXPLORE WITHOUT A PARTICULAR PRODUCT IN MIND?



WHERE AUDIENCES OVER-INDEX

DRINKERS FREQUENTLY (127i)

RARE DRINKERS RARELY (178i)

NON-DRINKERS NEVER (207i)

GEN Z OCCASIONALLY (106i)

MILLENNIALS FREQUENTLY (173i)

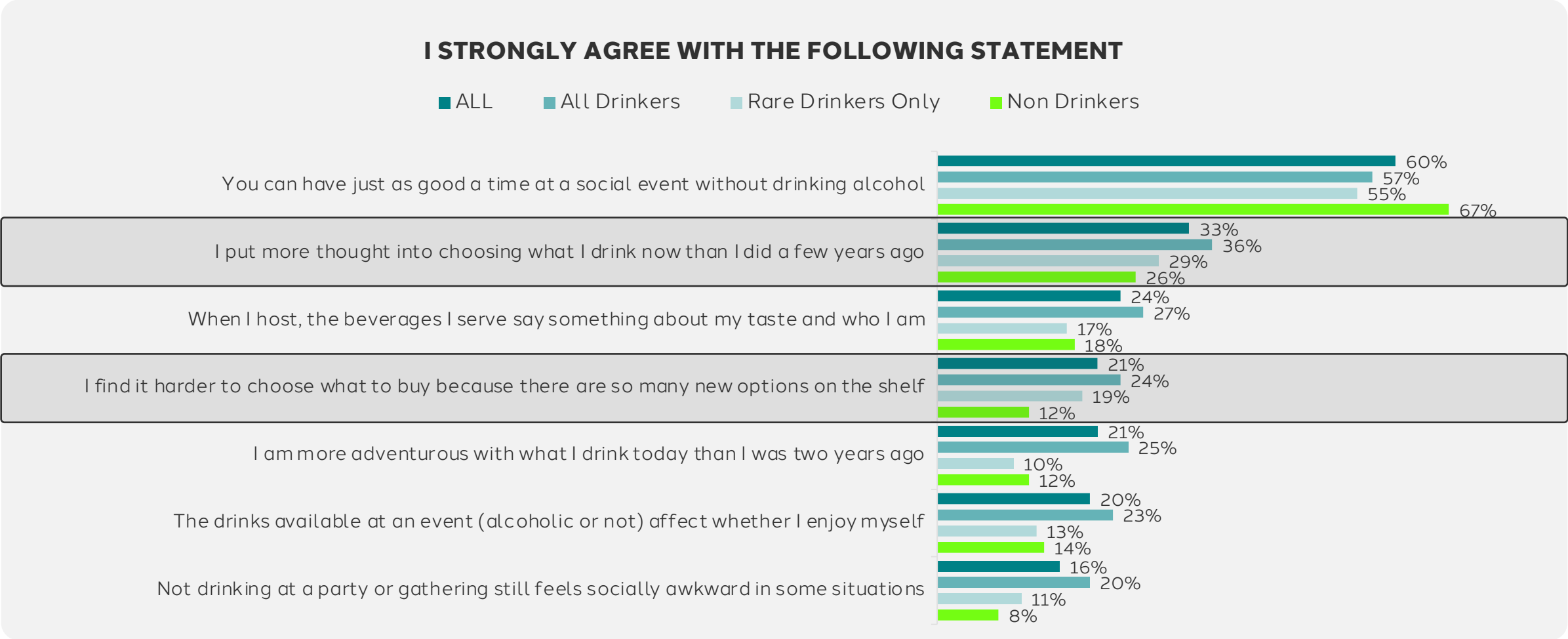
GEN X RARELY (117i)

BOOMERS NEVER (181i)



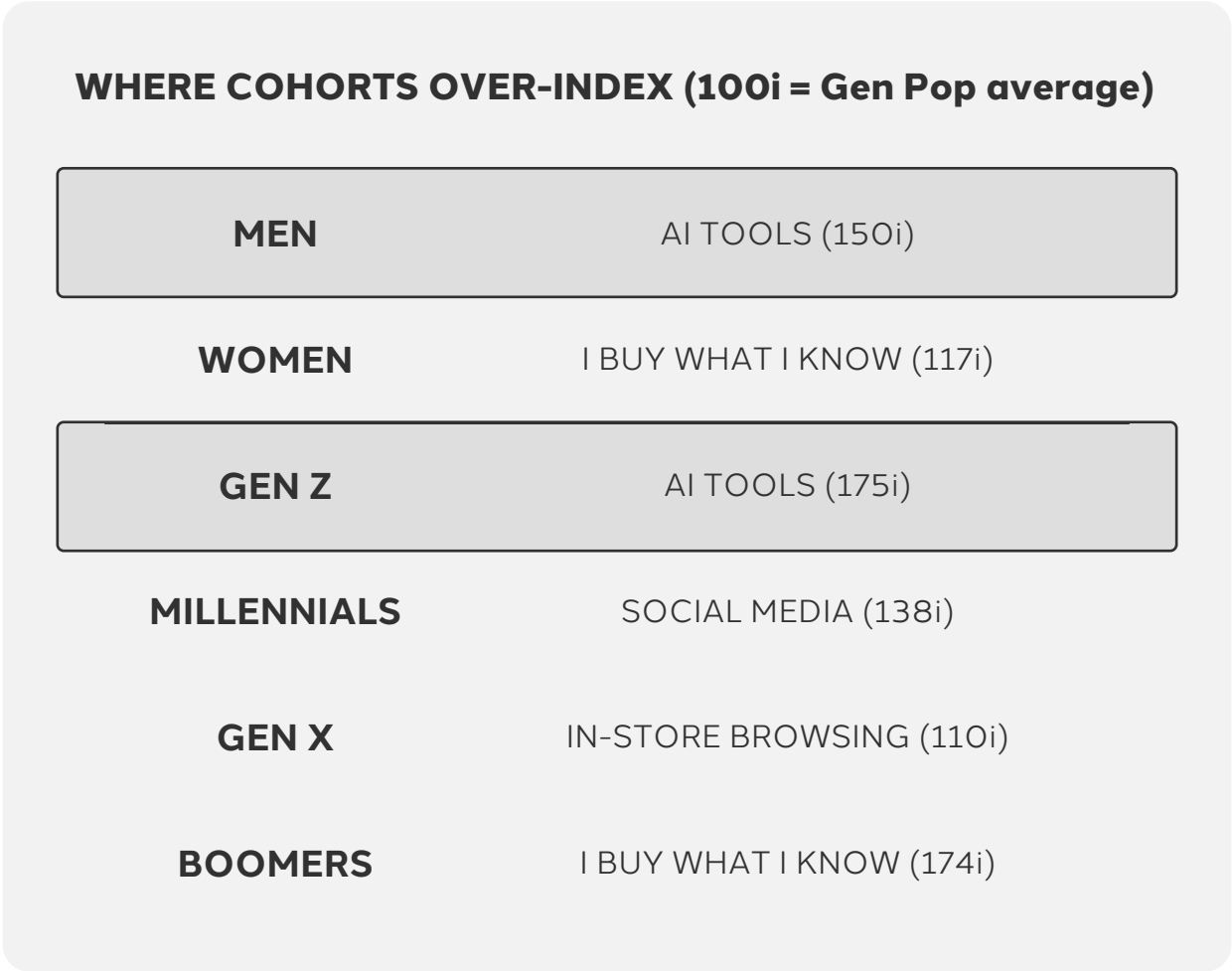
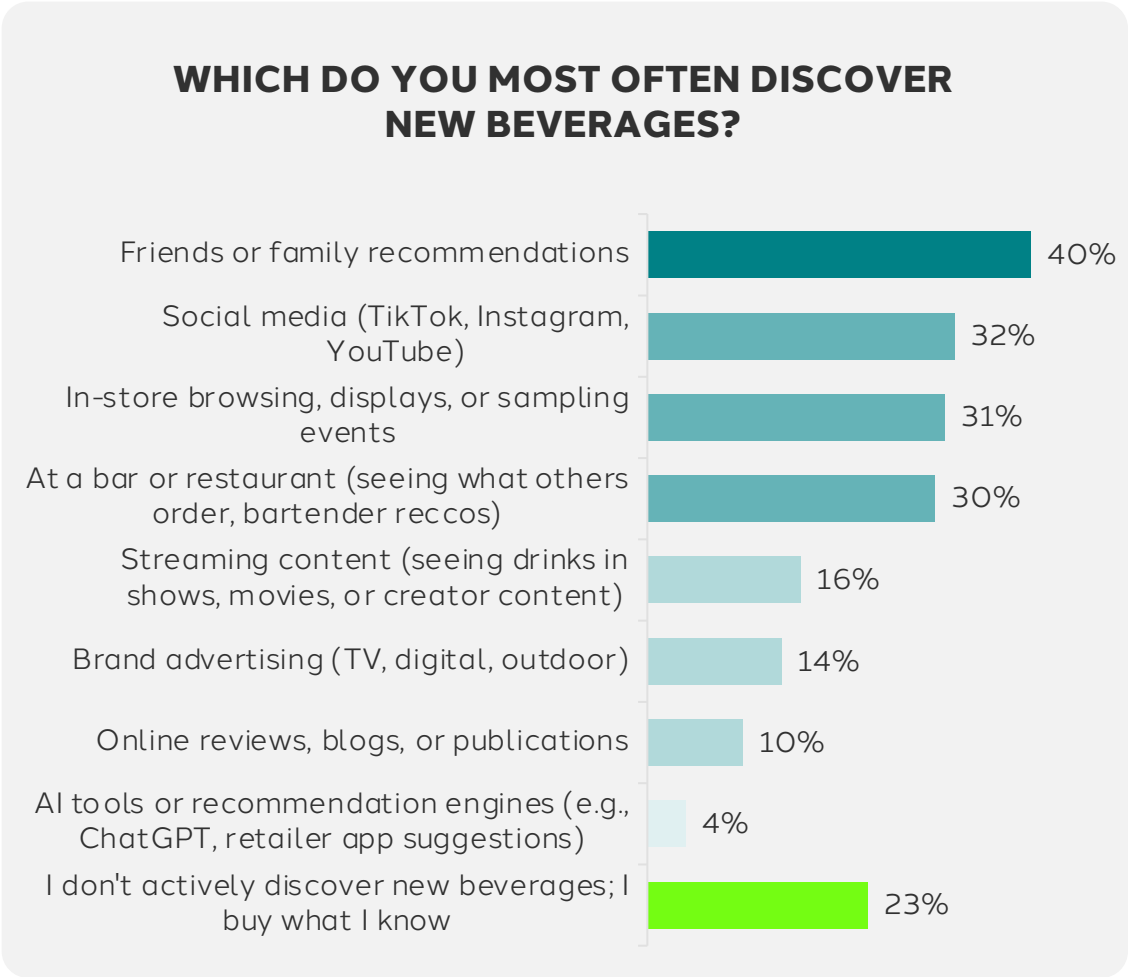
DRINKERS ARE BOTH INTRIGUED AND FRUSTRATED BY THE CHOICE OF ALCOHOLIC BEVERAGES AVAILABLE TO THEM

On the other hand, Non-Drinkers have an easier time choosing.



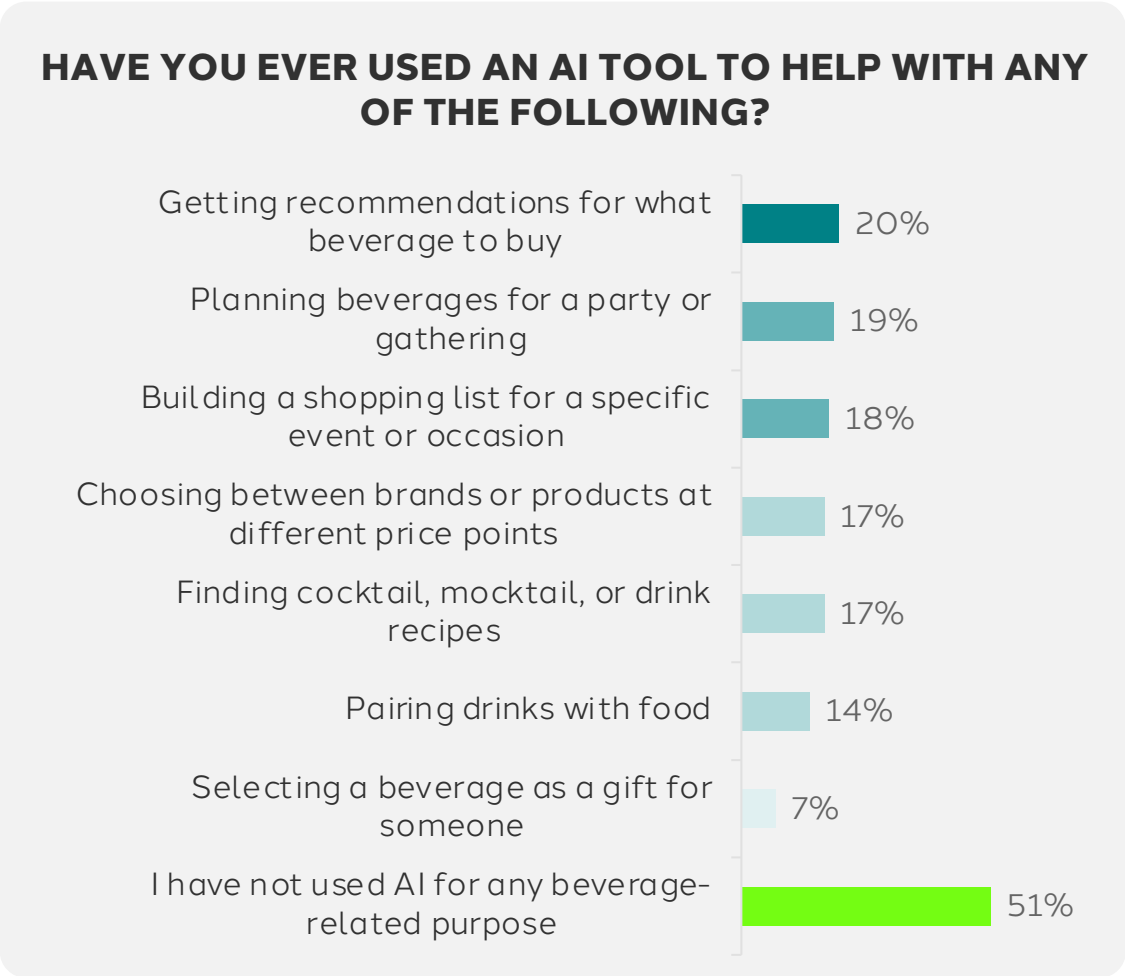
DRINK DISCOVERY IS MOST OFTEN OCCURRING ON SOCIAL MEDIA OR IRL, WHEREAS THE USE OF AI FOR BEVERAGE RECCOMMENDATIONS IS STILL VERY LIMITED

However, Men and Gen Zers are more likely to turn to them. Women and Boomers tend to stick to drinks we know.



DRINKERS ARE THE AUDIENCE THAT IS TURNING TO AI TOOLS FOR SHOPPING RECOMMENDATIONS AND RECIPES THE MOST

Their usage among Rare or Non-Drinkers, as well as among older consumers, is still quite limited.



WHERE AUDIENCES OVER-INDEX

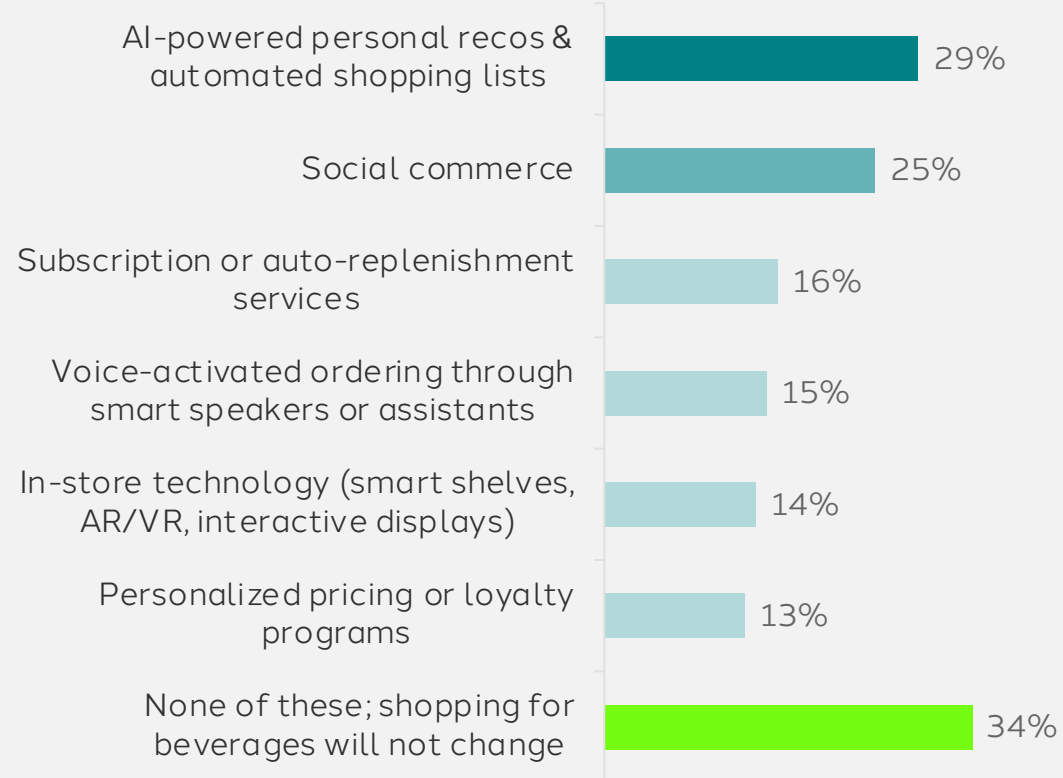
DRINKERS	FINDING DRINK RECIPES (135i)
RARE DRINKERS	I HAVE NOT USED AI FOR DRINK PURPOSES (129i)
NON-DRINKERS	I HAVE NOT USED AI FOR DRINK PURPOSES (153i)
GEN Z	GETTING RECOS ON WHICH DRINKS TO BUY (125i)
MILLENNIALS	BUILDING A DRINK SHOPPING LIST FOR AN EVENT (191i)
GEN X	I HAVE NOT USED AI FOR DRINK PURPOSES (127i)
BOOMERS	I HAVE NOT USED AI FOR DRINK PURPOSES (170i)



NONETHELESS, CONSUMERS EXPECT AI TO BE THE TECHNOLOGY THAT DISRUPTS SHOPPING FOR BEVERAGES IN THE NEAR FUTURE

However, Drinkers and Gen Z think social commerce will have a bigger impact on discovery.

LOOKING AHEAD, WHICH OF THE FOLLOWING DO YOU THINK WILL MOST CHANGE HOW PEOPLE DISCOVER AND BUY BEVERAGES IN THE NEXT 3 TO 5 YEARS?



WHERE AUDIENCES OVER-INDEX

DRINKERS	SOCIAL COMMERCE (125i)
RARE DRINKERS	PERSONALIZED PRICING OR LOYALTY (146i)
NON-DRINKERS	NONE OF THESE (173i)
GEN Z	SOCIAL COMMERCE (121i)
MILLENNIALS	AI-POWERED RECOS AND SHOPPING LISTS (141i)
GEN X	PERSONALIZED PRICING AND LOYALTY (116i)
BOOMERS	NONE OF THESE (156i)



CONSUMER INTEREST IN AI TOOLS FOR BEVERAGE RECOMMENDATIONS IS DRIVEN BY SAVINGS AND VALUE CONSIDERATIONS

HOW INTERESTED WOULD YOU BE IN USING AN AI-POWERED TOOL THAT COULD DO EACH OF THE FOLLOWING?



4 IN 10 US CONSUMERS SAY THEY WOULD TRUST BEVERAGE RECOMMENDATIONS FROM AI TOOLS

Trust is driven by Millennials.



WHERE AUDIENCES OVER-INDEX	
DRINKERS	VERY LIKELY (137i)
RARE DRINKERS	I'D USE IT AS A STARTING POINT (117i)
NON-DRINKERS	I WOULD NOT USE IT AT ALL (174i)
GEN Z	SOMEWHAT LIKELY (112i)
MILLENNIALS	VERY LIKELY (200i)
GEN X	I WOULD NOT USE IT AT ALL (117i)
BOOMERS	I WOULD NOT USE IT AT ALL (166i)



IMPLICATIONS FOR MARKETERS

RESTATE YOUR BRAND SUPERIORITY IN MACHINE-READABLE TERMS

Most consumers already know what beverages to buy but this may change as AI tools are increasingly embedded in grocery, retail, and dining experiences. AI tools might expose consumers to challenger products and erode your market advantage. Plant AI friendly information around your stature as a preferred consumer option for a variety of use cases in the environments that LLMs crawl for recommendations (e.g., Reddit).

PARTNER WITH CREATORS TO ESTABLISH DISTINCT PRODUCT-BASED COMMUNITIES

Consumers are often struggling with the embarrassment of riches presented to them when they are selecting a beverage. Influencers provide an opportunity to really amp up how specific products are best suited to certain personas or social rituals to make the intended connections between your portfolio and your target audience more immediate. Don't only look at the number of followers but also consider how influencers who are highly trusted within micro-communities may be able to deliver a different level of depth and penetration.

COLLECT IRL ANECDOTES FROM END USERS

Information might be increasingly fetched via AI models, but it is authentic, IRL stories that audiences ultimately relate with the most, no matter how those stories are unearthed. Develop programs that encourage your customers to share online their own recipes and pairings so that content can be surfaced to undecided consumers.

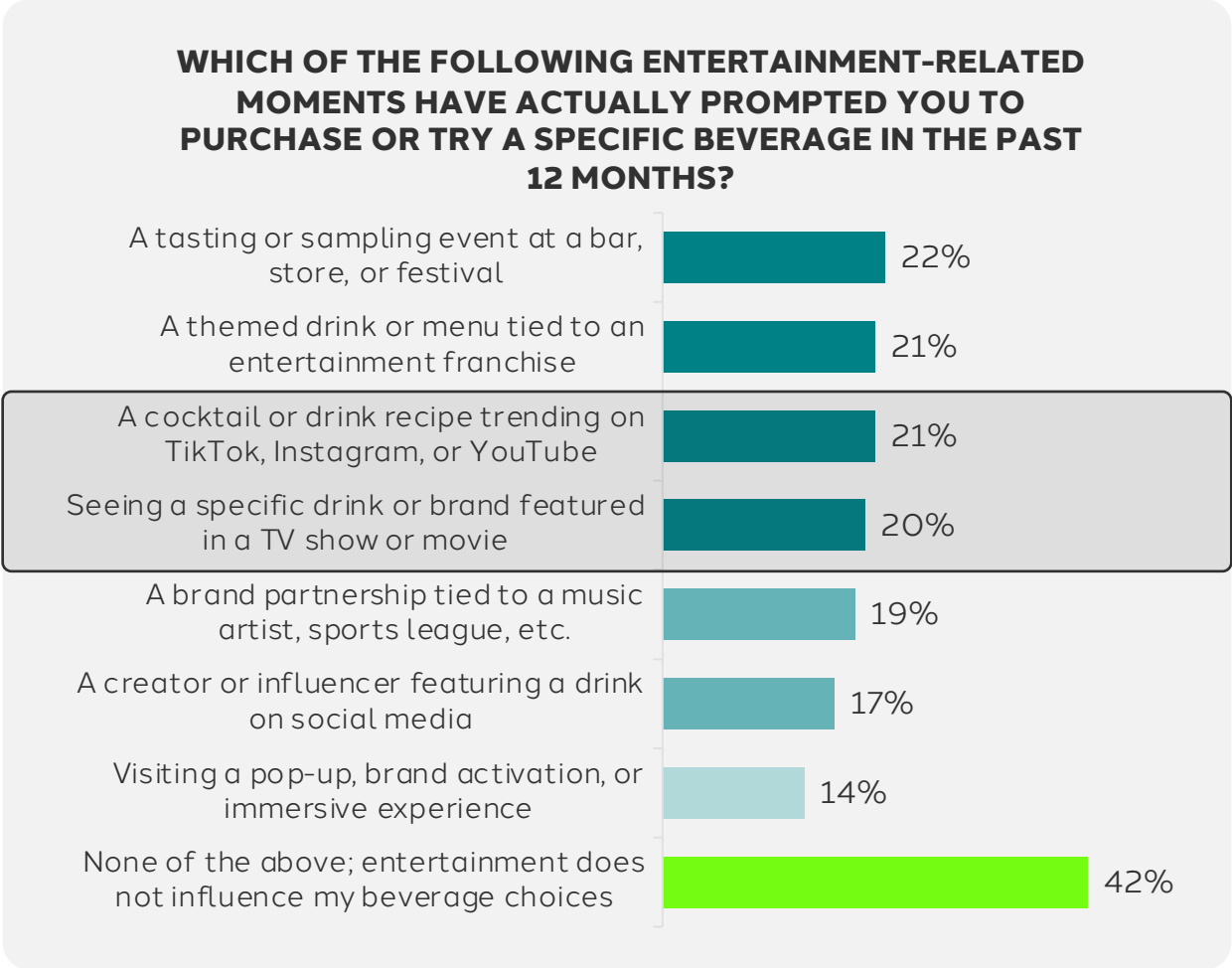
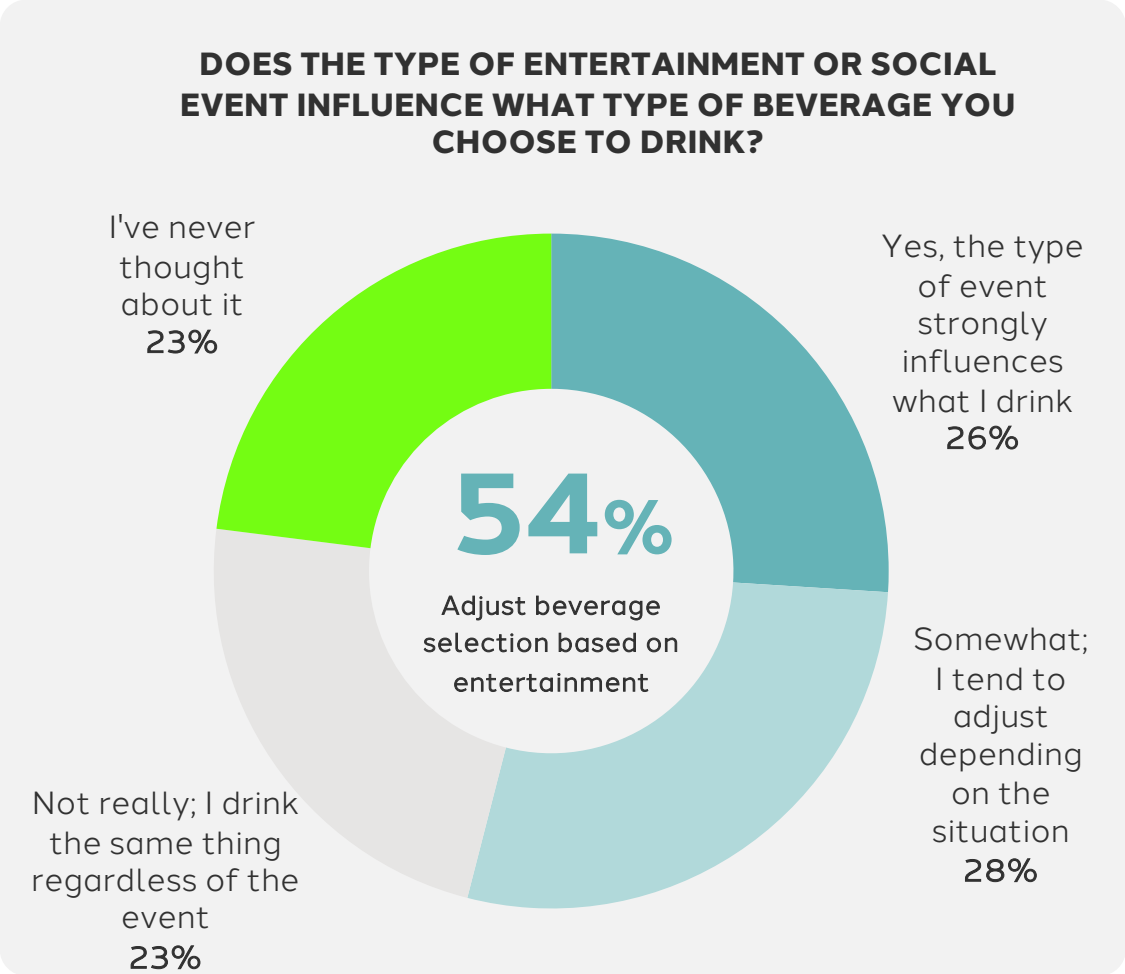


HOW ENTERTAINMENT, AND GIFTING INFLUENCE BEVERAGE SALES



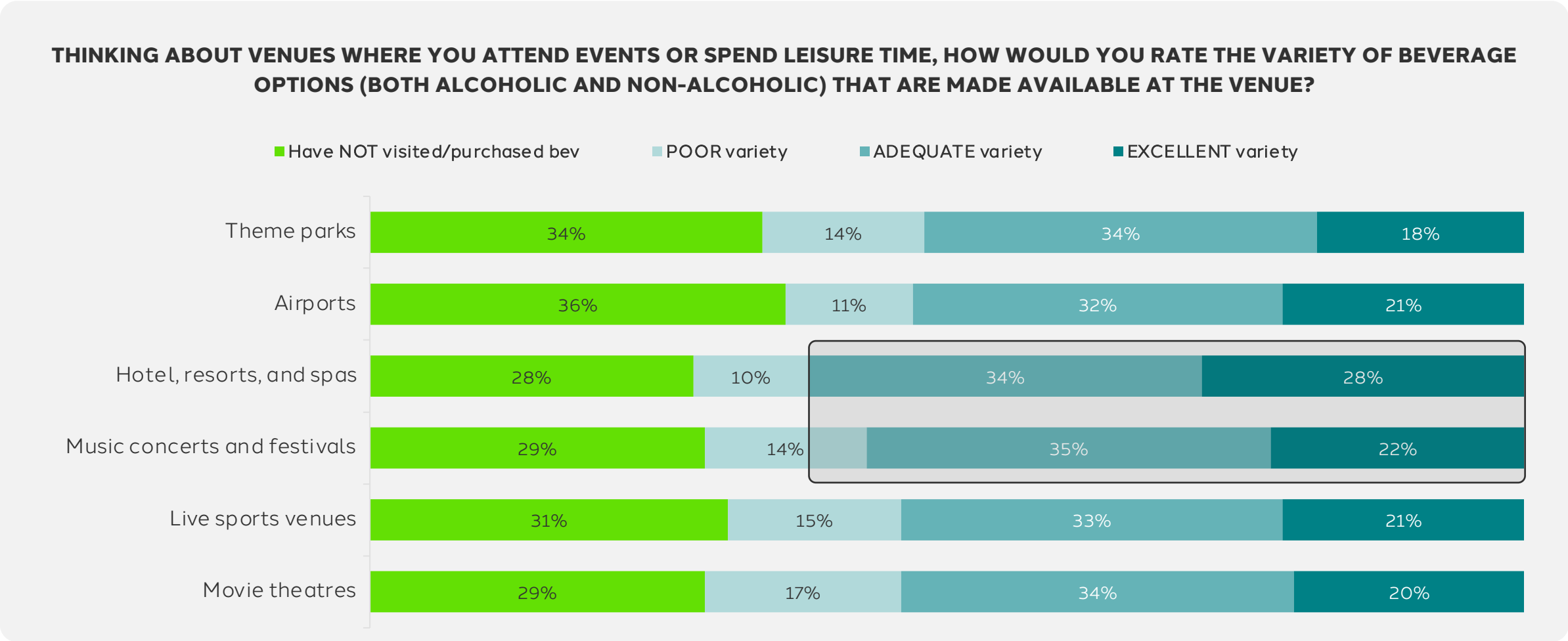
MOST AMERICANS CHOOSE THEIR BEVERAGES BASED ON THE ENTERTAINMENT THEY ARE PAIRING THEM WITH

2 in 10 buy beverages they see featured in TV shows or in recipes that are trending in social media.



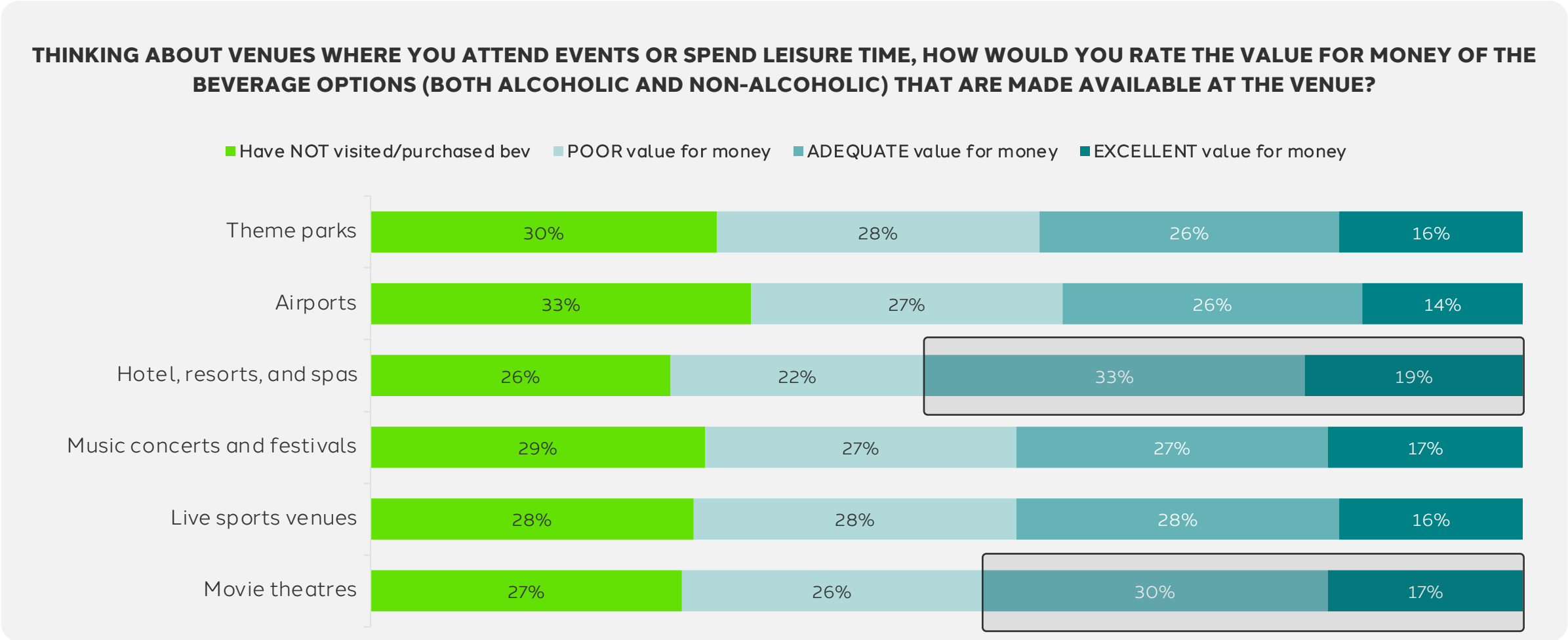
HOTELS AND MUSIC CONCERTS ARE VALUED FOR THE VARIETY OF BEVERAGE OPTIONS THEY OFFER

Airports and theme parks are the venues where consumers are less likely to have purchased beverages.



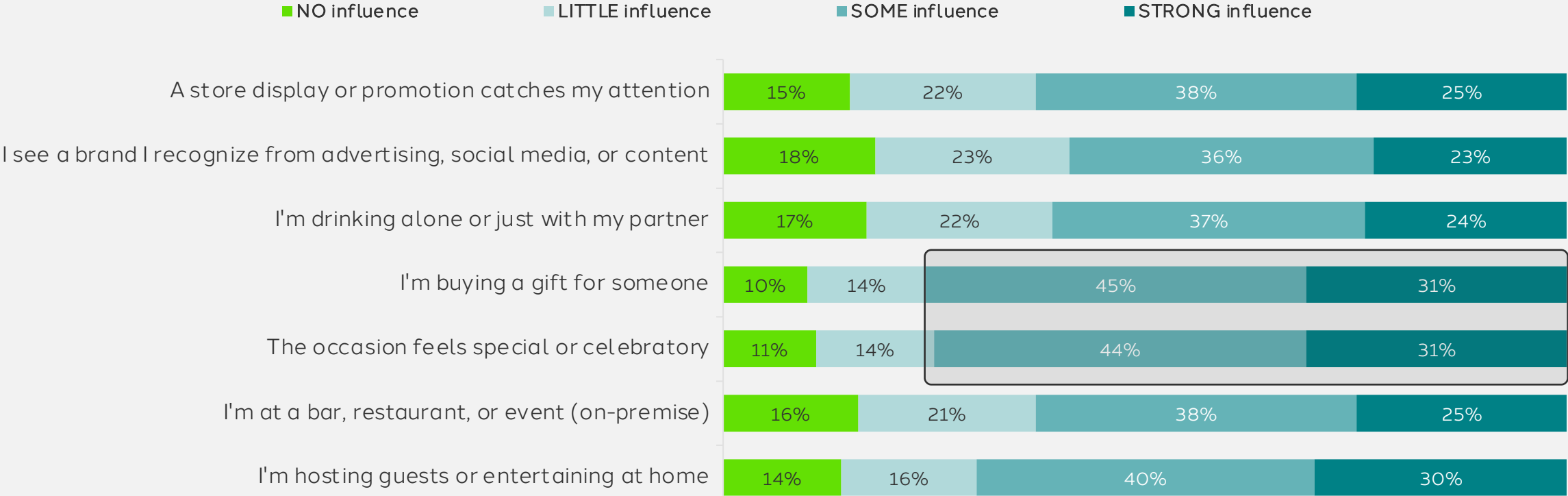
FROM A VALUE FOR MONEY STANDPOINT, CONSUMERS ARE MOSTLY SATISFIED WITH BEVERAGE OPTIONS IN HOTELS AND MOVIE THEATRES

Theme parks and sports venues are perceived to be the less convenient venues to purchase beverages at.



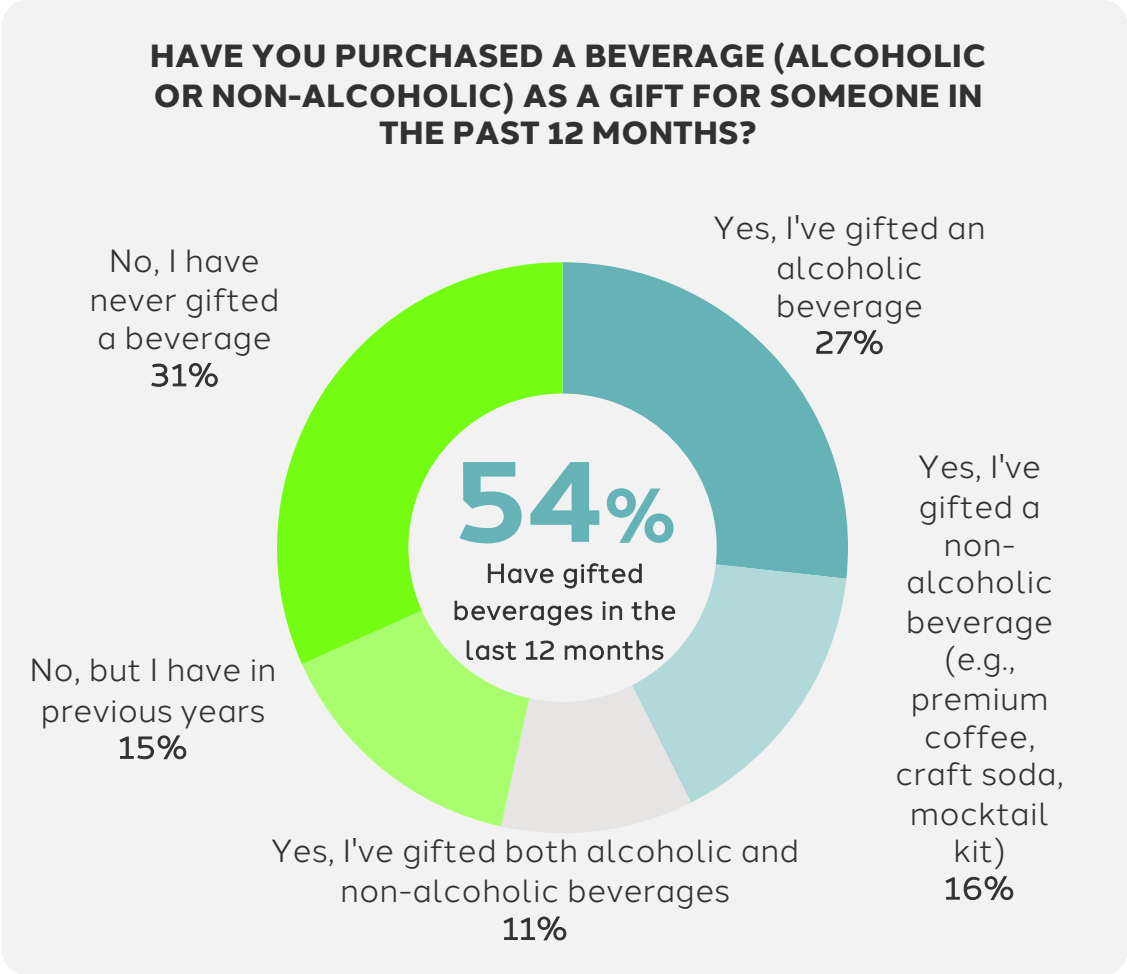
GIFTING AND CELEBRATING SPECIAL OCCASIONS ARE THE FACTORS THAT LEAD DRINKERS TO SPLURGE ON ALCOHOL THE MOST

THINKING ABOUT HOW YOU CHOOSE THE QUALITY OR PRICE TIER OF ALCOHOLIC BEVERAGES, HOW MUCH DOES EACH OF THE FOLLOWING FACTORS INFLUENCE YOU TO TRADE UP TO SOMETHING MORE PREMIUM?



MOST US CONSUMERS HAVE PURCHASED BEVERAGES AS A GIFT IN THE LAST YEAR

Drinkers and Millennials are most likely to have gifted alcoholic beverages.



WHERE AUDIENCES OVER-INDEX	
DRINKERS	GIFTED AN ALCOHOLIC BEVERAGE (133i)
RARE DRINKERS	I HAVE IN PREVIOUS YEARS (173i)
NON-DRINKERS	NO, NEVER (209i)
GEN Z	GIFTED A NON-ALCOHOLIC BEVERAGE (137i)
MILLENNIALS	GIFTED AN ALCOHOLIC BEVERAGE (137i)
GEN X	I HAVE IN PREVIOUS YEARS (133i)
BOOMERS	I HAVE IN PREVIOUS YEARS (166i)



CONSUMERS ARE LOOKING FOR SOLUTIONS THAT IMPROVE THE EXPERIENCE OF GIFTING BEVERAGES

2 in 10 are hoping AI can help them chose beverage options that are personalized to the recipient and occasion.

WHICH OF THE FOLLOWING WOULD MAKE THE EXPERIENCE OF CHOOSING AND GIVING A BEVERAGE AS A GIFT EASIER OR MORE APPEALING?



IMPLICATIONS FOR MARKETERS

EXPLORE ENTERTAINMENT IP PARTNERSHIPS THAT ARE RELEVANT TO YOUR PRODUCT PORTFOLIO

Entertainment is a driver for beverages consumption that cannot be underestimated. From mass market opportunities (e.g., Super Bowl or other major sport events) to more niche activations (e.g., identifying a drink that is ritualistically associated with a specific IP, like White Russians with a *Big Lebowski* anniversary), there are different tiers of IP partnerships [to be explored](#) based on your portfolio and the audience you are targeting.

CREATE VALUE BASED BUNDLES WITH LIVE EXPERIENCE PROVIDERS

Consumers splurge on concessions to celebrate big moments in culture or big moments in the personal history of their fandom (e.g., the release of a long-awaited IP in the movie theatre). Negotiate with movie theatre chains, sports venues, music festival promoters how your products can be at the forefront of the adjacent offerings surrounding a meaningful fan experience and generate savings for the end consumer who is willing to add on for the right price.

TURN GIFTING INTO AN EXPERIENCE (VS A TRANSACTION)

Gifting is the key driver for splurging on more premium options and therefore consumers expect a shopping/gifting/receiving experience that feels out of the ordinary if not even luxurious, as opposed to a simple transaction. Consider how you might be able to elevate the retail experience, or the product experience, by leveraging technology to personalize each gift selection and make the buyer feel like a savvy match-maker.

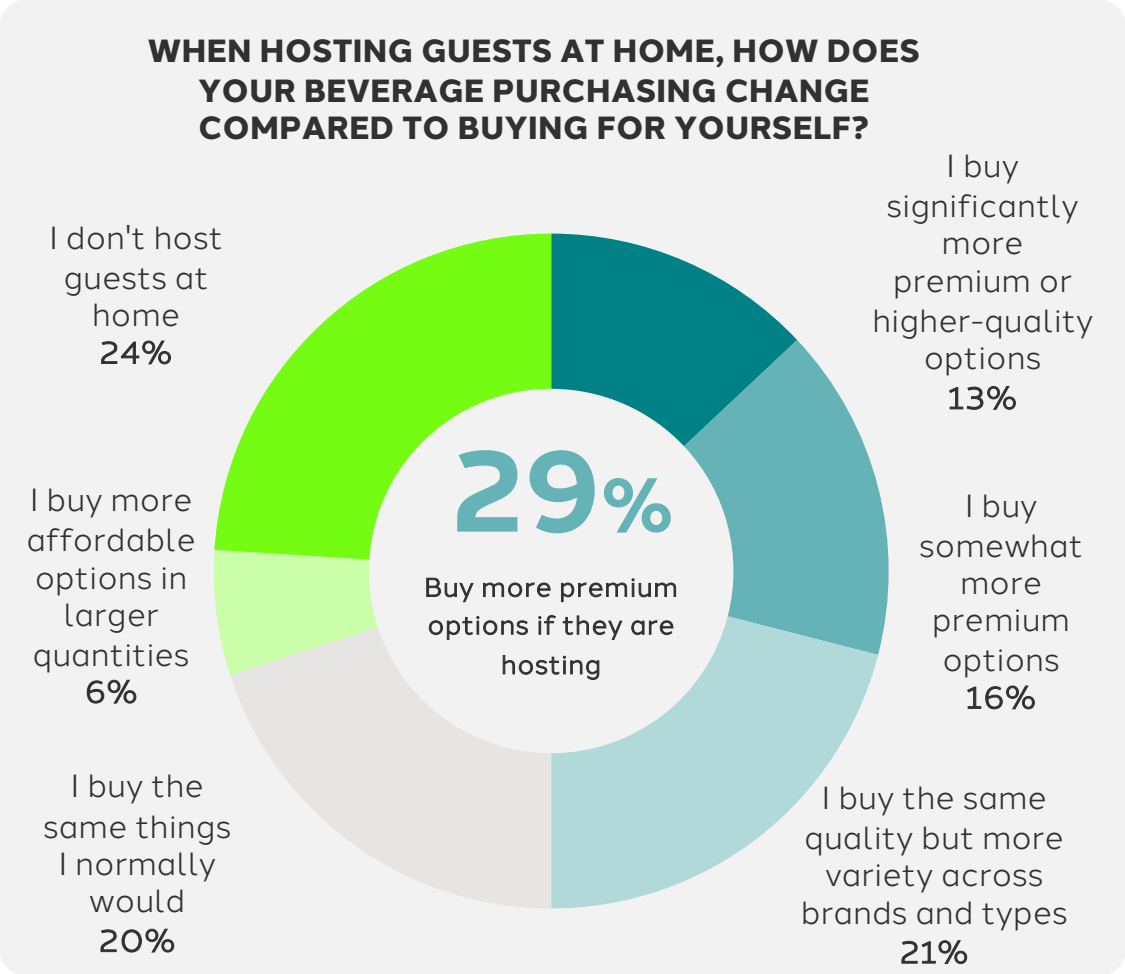


HOW DRINKING IS PAIRED WITH HOSTING AND DINING



3 IN 10 AMERICANS SPLURGE ON BEVERAGES IF THEY ARE HOSTING GUESTS IN THEIR HOMES

Millennials over-index on buying significantly more premium options when they host.

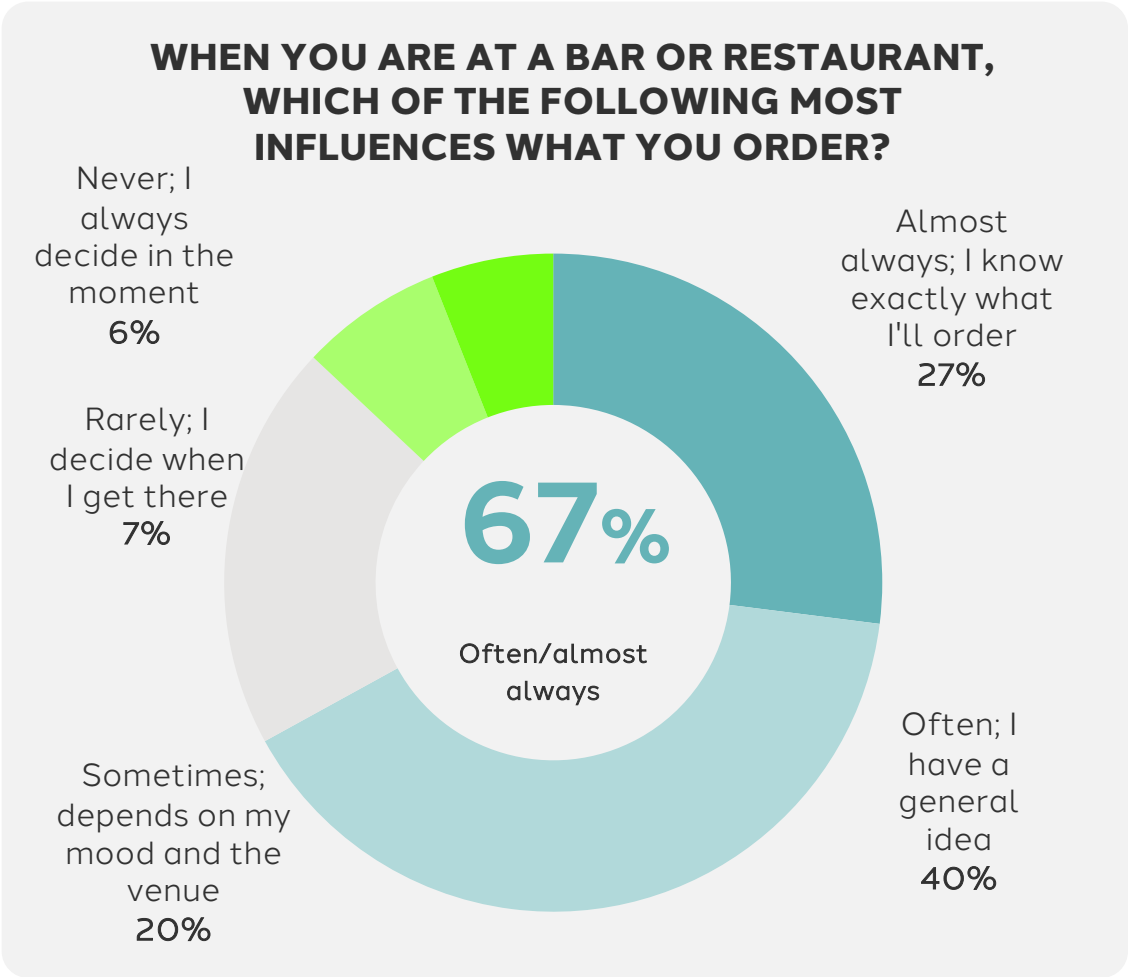


WHERE AUDIENCES OVER-INDEX	
DRINKERS	BUY SOMEWHAT MORE PREMIUM OPTIONS (131i)
RARE DRINKERS	BUY THE SAME THINGS THEY NORMALLY WOULD (140i)
NON-DRINKERS	DON'T HOST GUESTS AT HOME (212i)
GEN Z	BUY THE SAME THINGS THEY NORMALLY WOULD (128i)
MILLENNIALS	BUY SIGNIFICANTLY MORE PREMIUM OPTIONS (200i)
GEN X	DON'T HOST GUESTS AT HOME (121i)
BOOMERS	DON'T HOST GUESTS AT HOME (125i)



2 IN 3 DRINKERS ALREADY KNOW WHAT BEVERAGE THEY WILL ORDER BEFORE THEY GO OUT TO EAT OR DRINK

Gen Z over-index on only doing so sometimes.

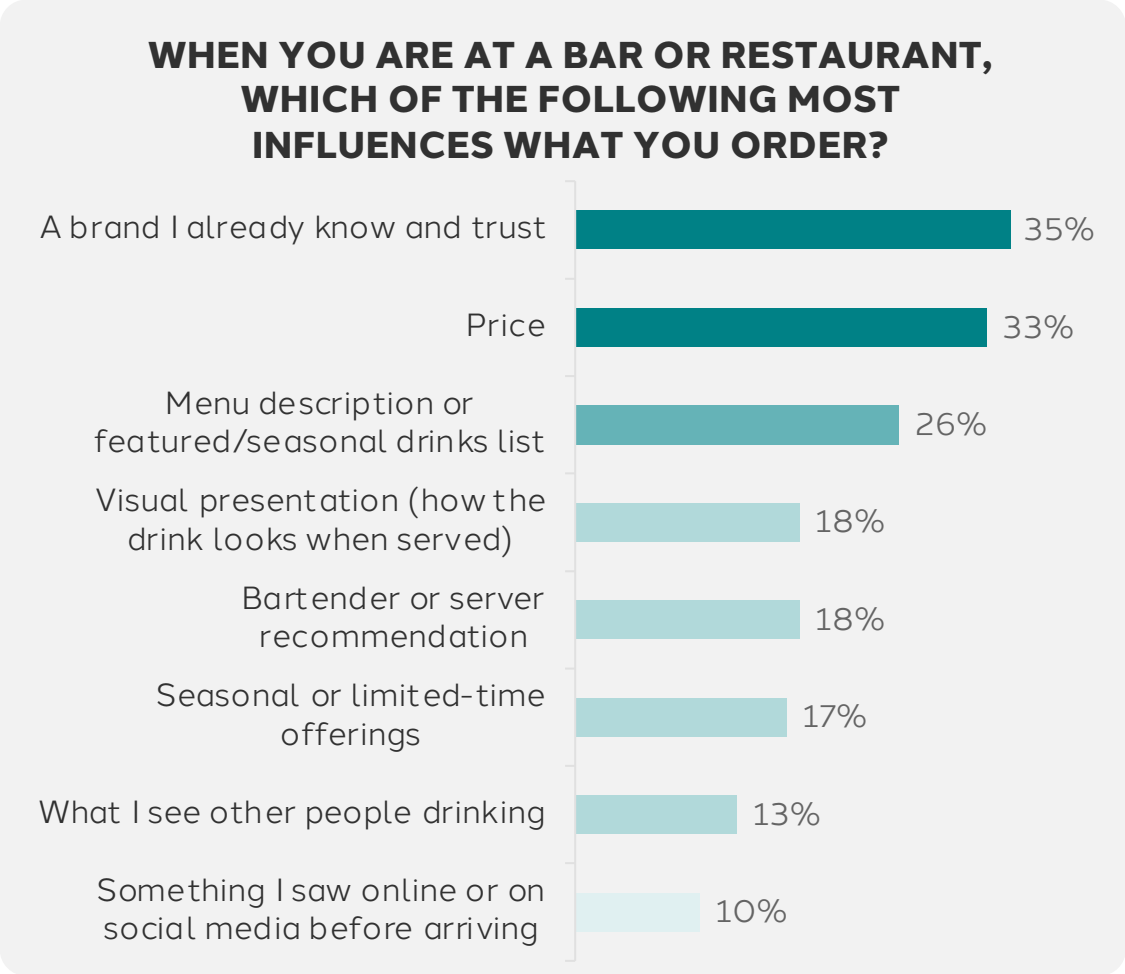


WHERE AUDIENCES OVER-INDEX	
MEN	OFTEN (105i)
WOMEN	SOMETIMES (105i)
GEN Z	SOMETIMES (130i)
MILLENNIALS	ALMOST ALWAYS (126i)
GEN X	RARELY (114i)
BOOMERS	NEVER (166i)



BRAND TRUST AND PRICE ARE THE CRITERIA THAT INFLUENCE HOW DRINKERS ORDER THE MOST

Gen Z over-index on pointing to visual presentation as a factor, while Millennials trust server recommendations.

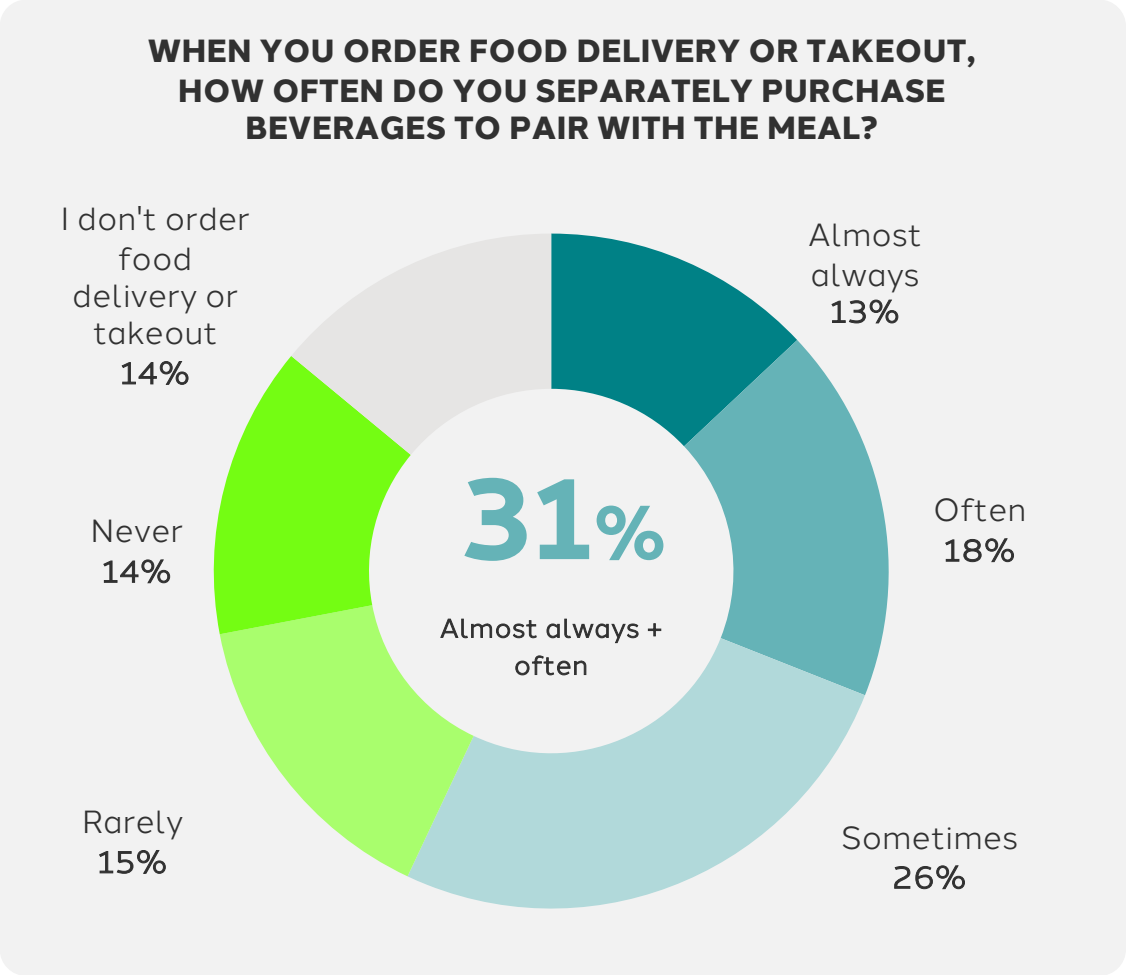


WHERE AUDIENCES OVER-INDEX	
MEN	WHAT I SEE OTHER PEOPLE DRINKING (120i)
WOMEN	VISUAL PRESENTATION (111i)
GEN Z	VISUAL PRESENTATION (128i)
MILLENNIALS	SERVER RECOMMENDATIONS (133i)
GEN X	PRICE (118i)
BOOMERS	A BRAND I KNOW AND TRUST (160i)



ONLY 3 IN 10 CONSUMERS REGULARLY PURCHASE BEVERAGES SEPARATELY TO PAIR THEM WITH DELIVERY OR TAKE OUT FOOD

Non-Drinkers are more likely not to order food for delivery or take out.

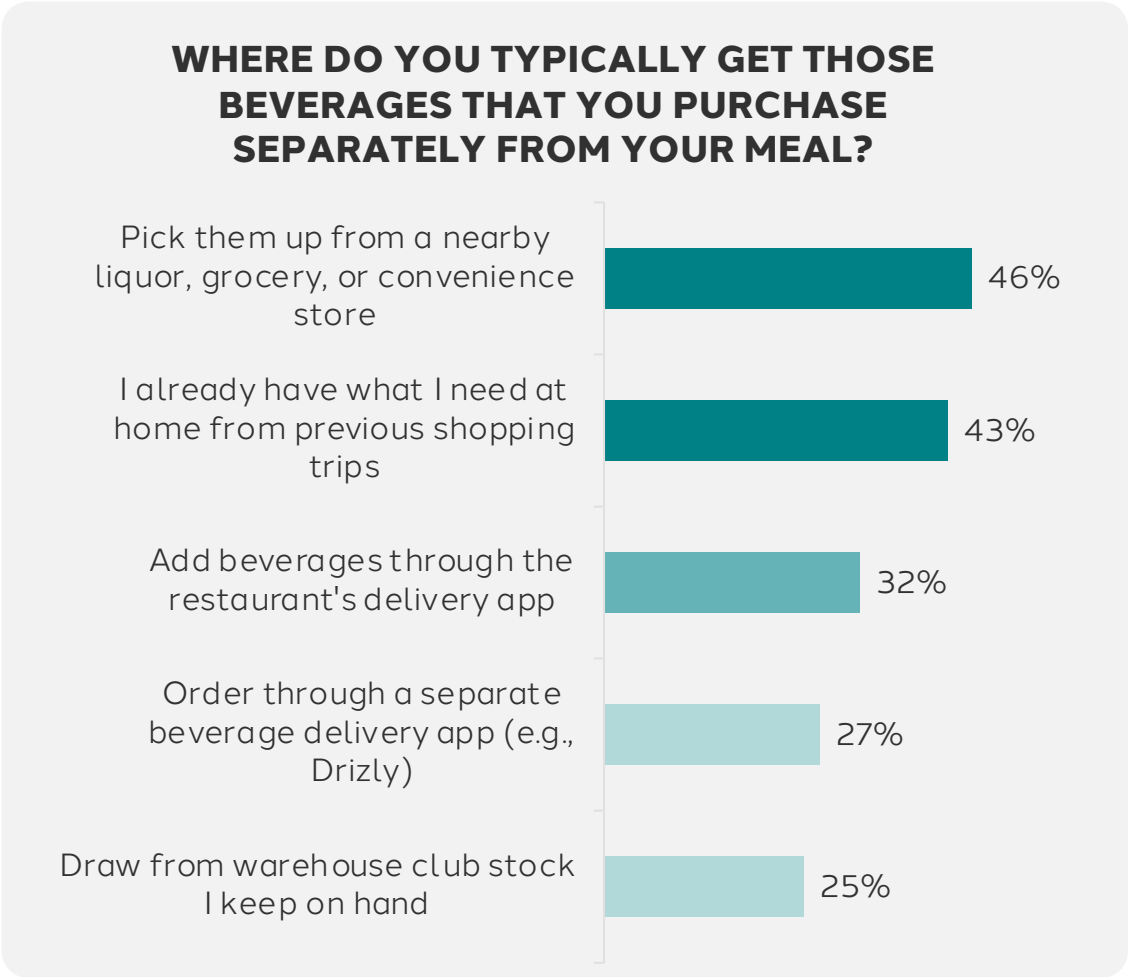


WHERE AUDIENCES OVER-INDEX	
DRINKERS	OFTEN (133i)
RARE DRINKERS	NEVER (171i)
NON-DRINKERS	I DON'T ORDER DELIVERY OR TAKE OUT (207i)
GEN Z	SOMETIMES (111i)
MILLENNIALS	OFTEN (183i)
GEN X	NEVER (128i)
BOOMERS	NEVER (193i)



TAKE OUT/DELIVERED MEALS ARE USUALLY PAIRED WITH BEVERAGES PURCHASED WHILE GROCERY SHOPPING

Gen Zers over-index on adding beverages to their in-app delivery orders.



WHERE AUDIENCES OVER-INDEX

DRINKERS	NEARBY LIQUOR STORE (111i)
RARE DRINKERS	NEARBY LIQUOR STORE (124i)
NON-DRINKERS	I HAVE WHAT I NEED FROM PREVIOUS TRIPS (128i)
GEN Z	ADD BEVERAGES TO DELIVERY APP ORDER (113i)
MILLENNIALS	NEARBY LIQUOR STORE (111i)
GEN X	I HAVE WHAT I NEED FROM PREVIOUS TRIPS (109i)
BOOMERS	I HAVE WHAT I NEED FROM PREVIOUS TRIPS (135i)



IMPLICATIONS FOR MARKETERS

HIGHLIGHT YOUR PRODUCTS' VERSATILITY FOR THE OBJECTIVE-ORIENTED EVOLUTION OF COMMERCE

We used to search for what we wanted buy (e.g., a specific brand or product), but the emergence of AI-enabled search is getting us accustomed to searching for what to buy, i.e. stating one or multiple use-cases ("I'm hosting a dinner party with this many guests, some of whom have the following dietary restrictions...") and getting a recommended shopping list in return. Seed information focused on how your products can be used in a variety of ways based on the social occurrence to make sure audiences lean toward stocking up on them and buying more niche options 'around them.'

CULTIVATE AUDIENCES' MEMORY LANES

Most consumers already know what they'll order before they go out, but this doesn't mean that their preferences never change. Leverage storytelling levers in advertising such as humor, nostalgia, emotion to ensure your brand remains top of mind in audiences' subconscious backlog of key contenders in any given beverage category.

DEVELOP CHANNEL SPECIFIC MESSAGING

The point of purchase influences the mindset through which consumers select beverages. In-store advertising should emphasize the savings generated by purchasing for multiple meals (as opposed to an in-app purchase), while in-app advertising will more likely be effective if your products' ability to pair with a special occasion or a special meal is highlighted.



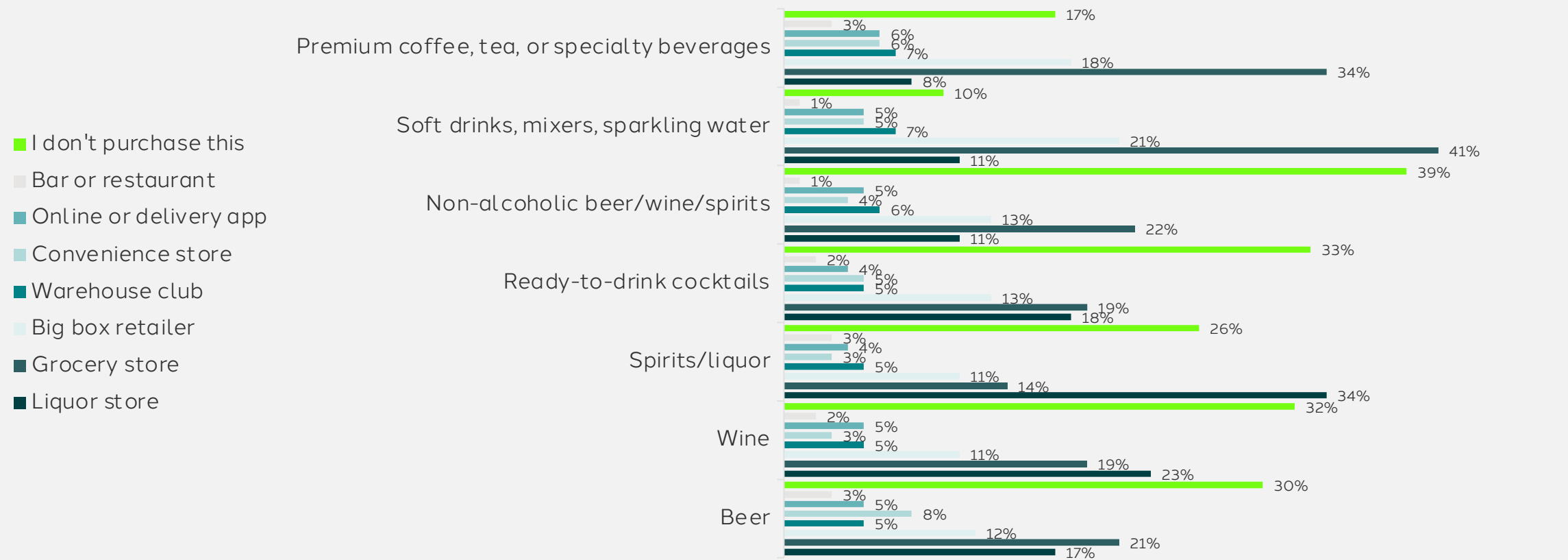
HOW BEVERAGE PURCHASING DECISIONS ARE MADE



BEER AND WINE ARE OFTEN PURCHASED AT THE GROCERY STORE, WHILE SPIRITS WARRANT LIQUOR STORE VISITS

The use of online options is still quite limited when it comes to alcohol products.

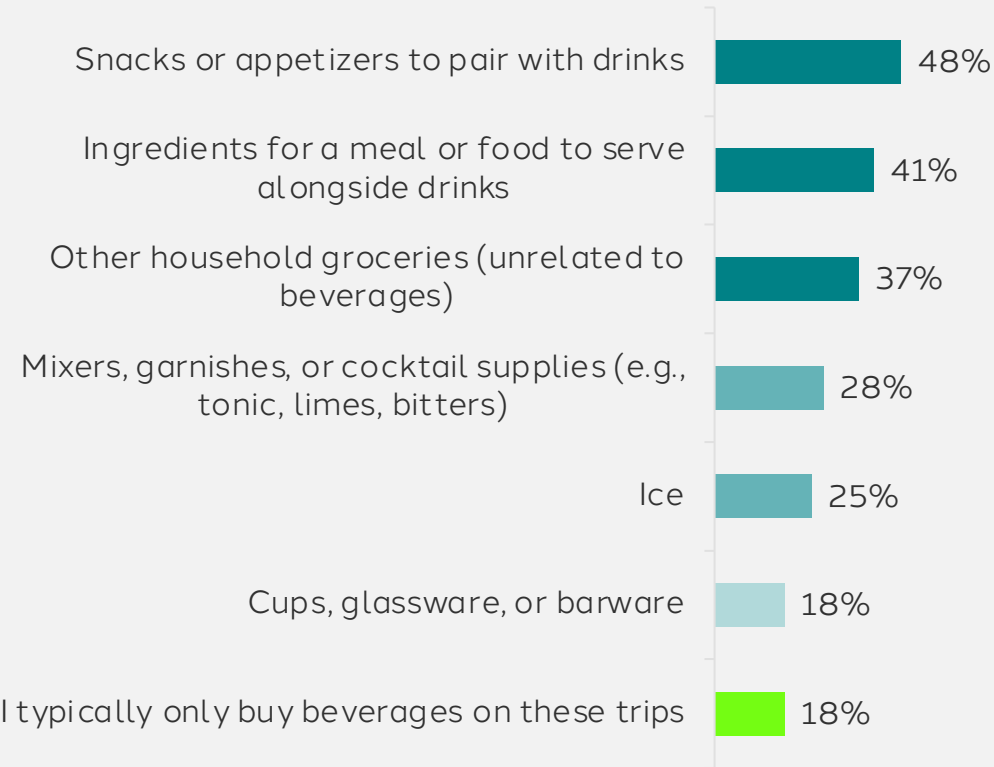
WHERE DO YOU MOST OFTEN PURCHASE THE FOLLOWING TYPES OF BEVERAGES?



SNACKS AND GROCERIES ARE MOST OFTEN BEING PURCHASED TO BE PAIRED WITH BEVERAGES

Non-Drinkers are most likely to purchase beverages on dedicated trips, possibly focused on gifting alcohol.

ON A TYPICAL SHOPPING TRIP THAT INCLUDES BEVERAGES, WHICH OF THE FOLLOWING DO YOU ALSO BUY?



WHERE AUDIENCES OVER-INDEX

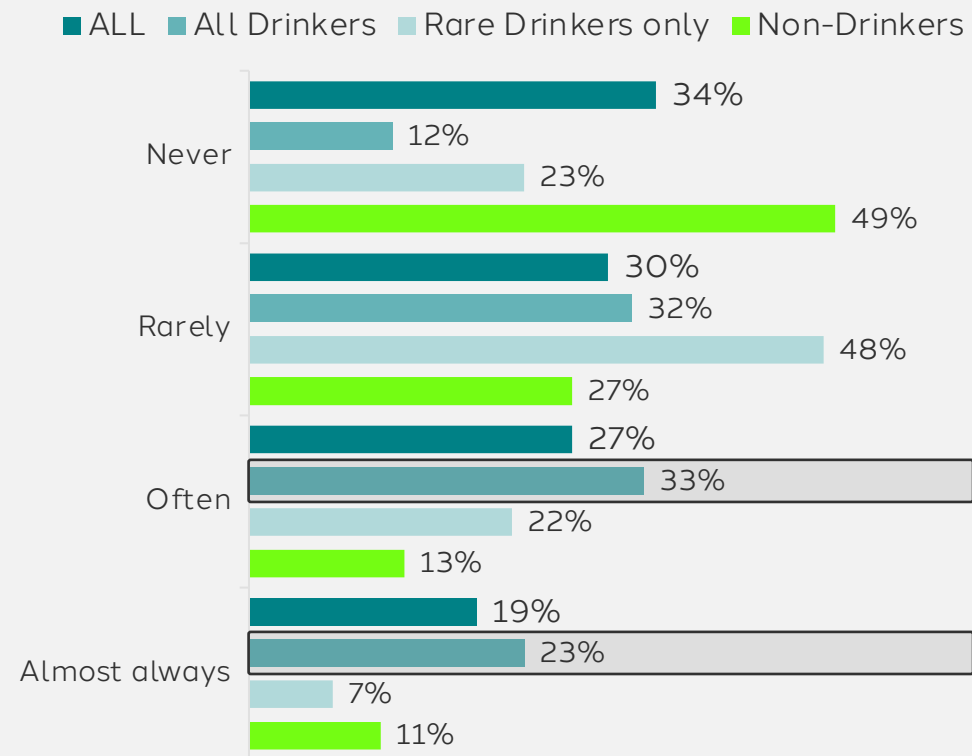
DRINKERS	SNACKS (117i)
RARE DRINKERS	OTHER HOUSEHOLD GROCERIES (121i)
NON-DRINKERS	I TYPICALLY ONLY BUY BEVS ON THESE TRIPS (161i)
GEN Z	CUPS, GLASSWARE (122i)
MILLENNIALS	RETAILER WEBSITE OR APP (161i)
GEN X	OTHER HOUSEHOLD GROCERIES (119i)
BOOMERS	OTHER HOUSEHOLD GROCERIES (146i)



DRINKERS ARE MORE LIKELY TO VISIT MORE THAN ONE STORE TO COMPLETE THEIR BEVERAGE SHOPPING

Millennials are most likely to visit more than one store on a regular basis.

HOW OFTEN DO YOU VISIT MORE THAN ONE STORE TO COMPLETE YOUR BEVERAGE SHOPPING FOR A SINGLE OCCASION?



WHERE COHORTS OVER-INDEX

MEN OFTEN (115i)

WOMEN NEVER (117i)

GEN Z OFTEN (115i)

MILLENNIALS ALMOST ALWAYS (168i)

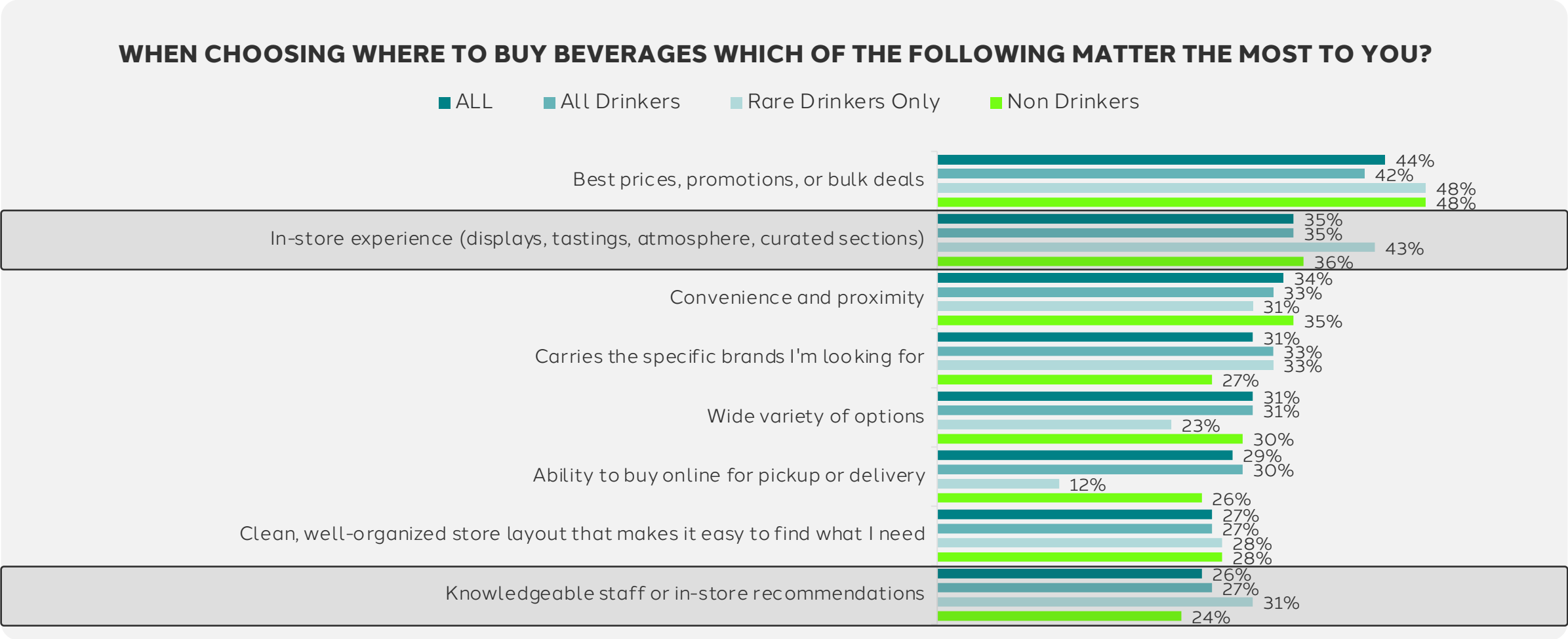
GEN X RARELY (123i)

BOOMERS NEVER (166i)



IN-STORE EXPERIENCES AND KNOWLEDGEABLE STAFF ARE THE KEY TO WINNING RARE DRINKERS' BUSINESS

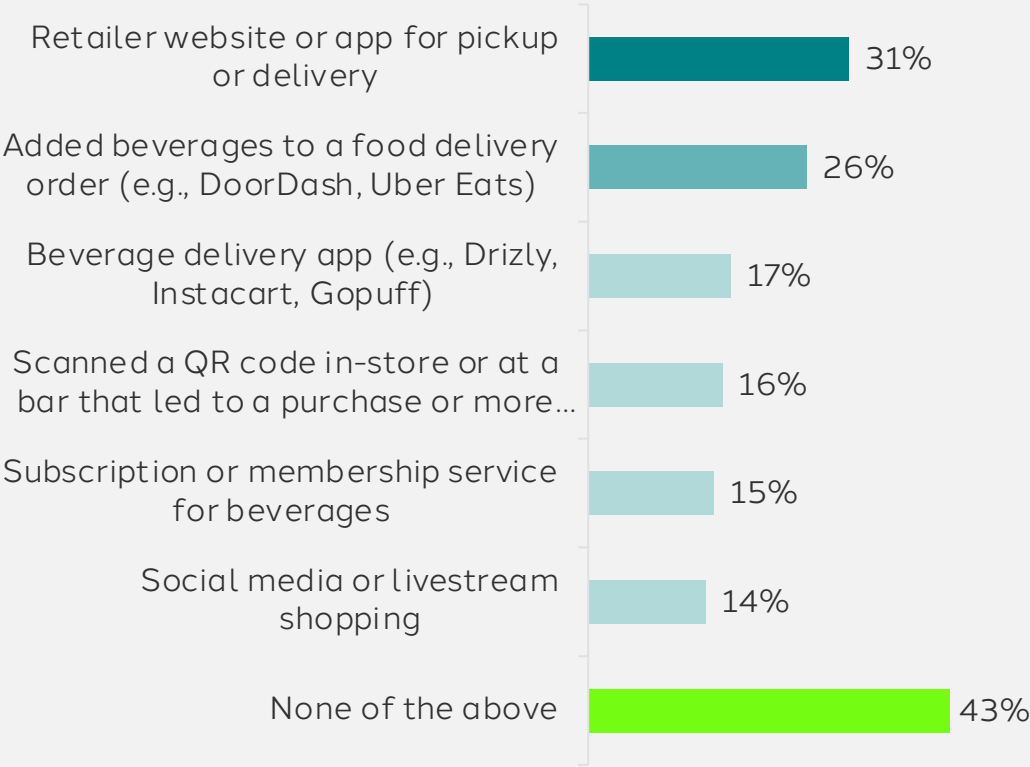
Across the board, all consumers put best prices at number one when choosing where to buy beverages.



RETAILER SITES/APPS AND FOOD DELIVERY APPS ARE THE DIGITAL CHANNELS CONSUMERS USE THE MOST FOR BEVERAGE PURCHASES

Gen Zers over-index on leveraging subscriptions and memberships.

HAVE YOU PURCHASED BEVERAGES THROUGH ANY OF THE FOLLOWING CHANNELS IN THE LAST 12 MONTHS?

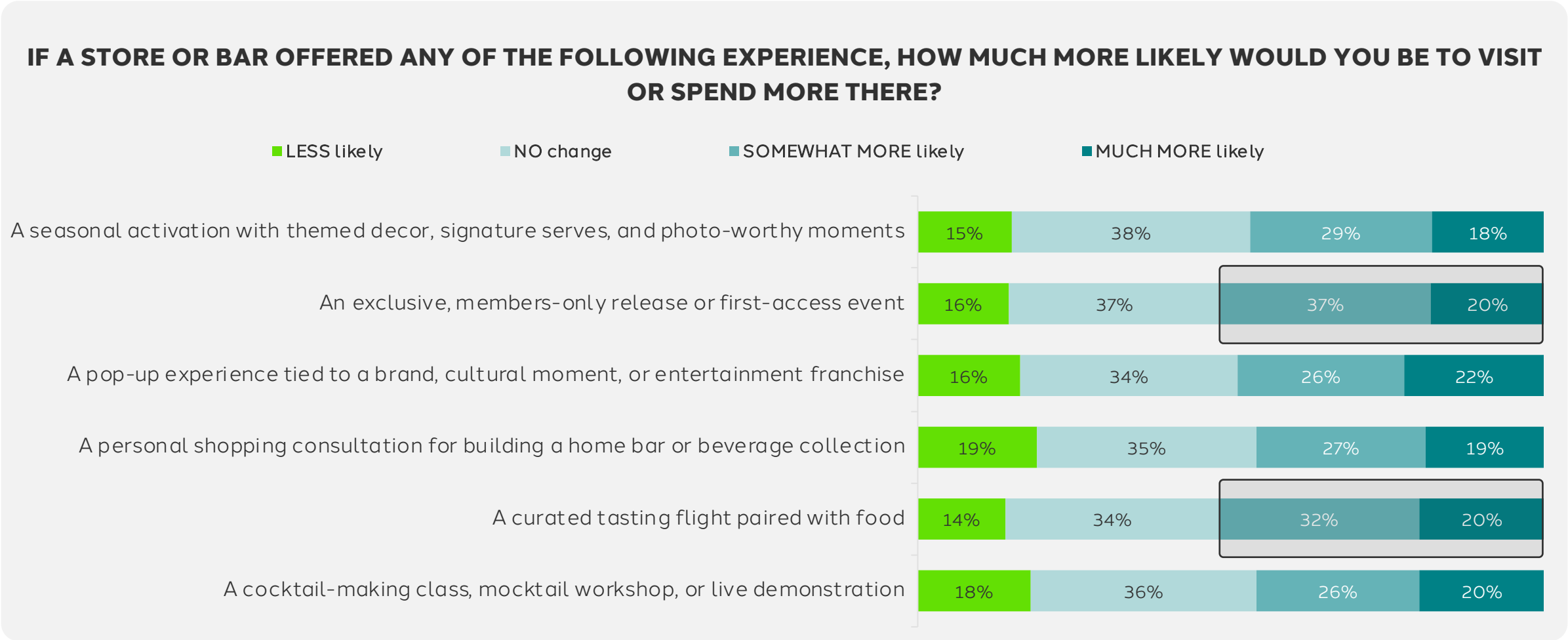


WHERE AUDIENCES OVER-INDEX

DRINKERS	RETAILER WEBSITE OR APP (119i)
RARE DRINKERS	NONE OF THE ABOVE (125i)
NON-DRINKERS	NONE OF THE ABOVE (144i)
GEN Z	SUBSCRIPTION (126i)
MILLENNIALS	RETAILER WEBSITE OR APP (161i)
GEN X	NONE OF THE ABOVE (121i)
BOOMERS	NONE OF THE ABOVE (184i)

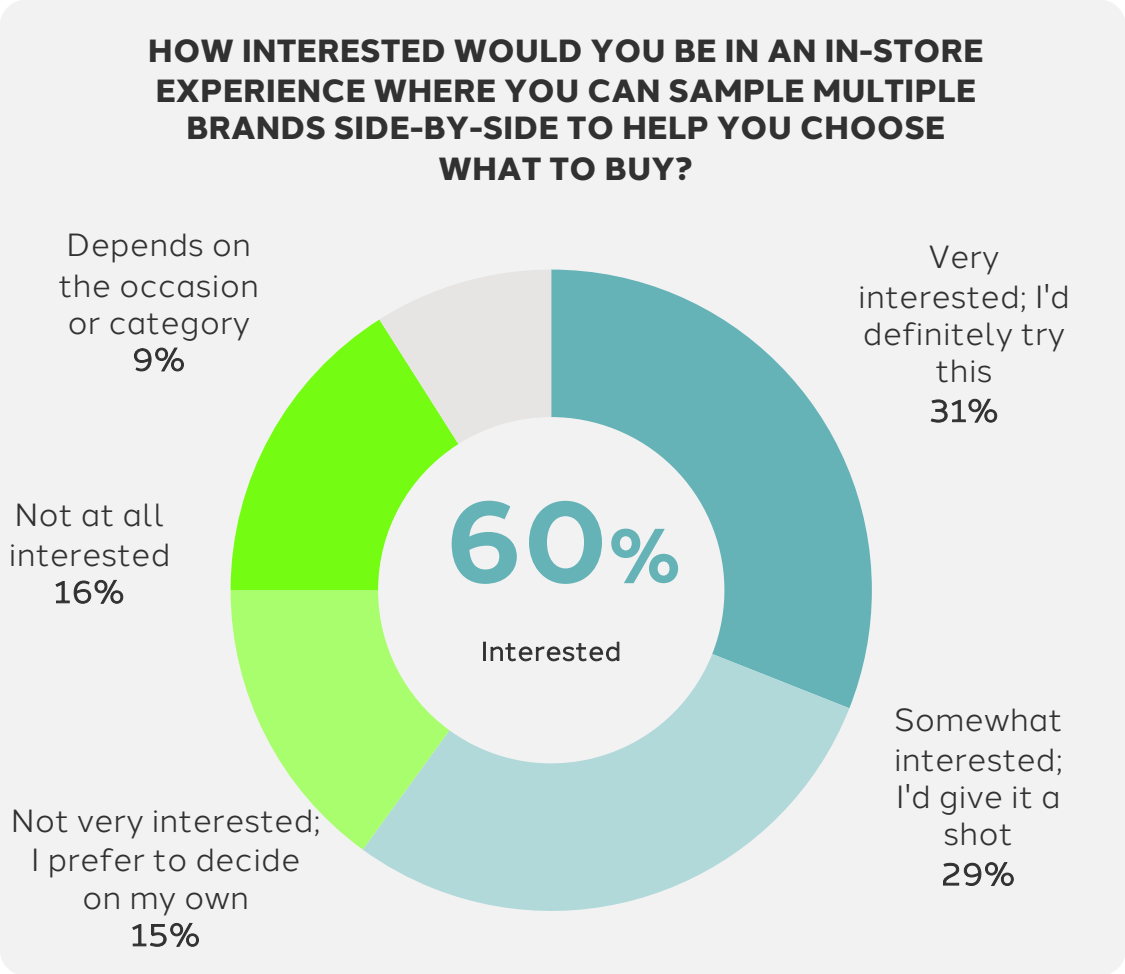


FROM AN EXPERIENTIAL POINT OF VIEW, MEMBER EXCLUSIVE ACCESS TO BEVERAGES AND CURATED TASTINGS ARE MOST LIKELY TO ATTRACT CONSUMERS TO STORES AND VENUES



MOST US CONSUMERS WOULD BE INTERESTED IN SAMPLING MULTIPLE BEVERAGES IN STORE SO THEY CAN PICK A BRAND MORE EASILY

Millennials over-index on being very interested, while Gen Zers say they would be more selective.



WHERE AUDIENCES OVER-INDEX	
DRINKERS	VERY INTERESTED (122i)
RARE DRINKERS	SOMEWHAT INTERESTED (137i)
NON-DRINKERS	DEPENDS ON THE CATEGORY (244i)
GEN Z	DEPENDS ON THE CATEGORY (200i)
MILLENNIALS	VERY INTERESTED (135i)
GEN X	NOT AT ALL INTERESTED (131i)
BOOMERS	NOT AT ALL INTERESTED (181i)



IMPLICATIONS FOR MARKETERS

UPSKILL RETAIL STAFF FOR SEASONAL AND LIMITED RELEASES

Consumers turn to in-store staff for recommendations and advice, especially if they are Rare Drinkers who only purchase the category for special occasions. Develop programs to help store associates learn more about your products, most importantly when the holiday shopping season is upcoming, or when you are releasing a new or limited-edition product.

INVEST IN COMMERCE MEDIA TO REACH AUDIENCES AT THE POINT OF PURCHASE

Retailer sites, food delivery apps, and beverage delivery apps are the digital channels most used by consumers to purchase beverages. Advertising within these environments means exposing audiences to your brand when they are in a shopping mindset.

ENGAGE RETAIL PARTNERS WITH THEMED POP-UP OPPORTUNITIES

Entertainment and gifting are significant drivers for beverage purchases. Consider how your IP partnerships, or partnership with adjacent product companies (e.g., glassware, food products, etc.) can manifest in fun pop-up activations within the retail space.



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THANK YOU

INNOVATING TO IMPACT

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