Drivers of the Sober Movement in the FMCG Beverage Industry

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Abstract

The sober movement, characterized by rising numbers of sober-curious and mindful drinking trends, has reshaped the fast-moving consumer goods (FMCG) beverage industry, with no/low-alcohol products gaining traction among younger demographics. A mixed method approach investigated how consumer attitudes and intentions toward health, wellness and additional drivers influences purchase intention of non-alcoholic beverages.

A literature review, ten interviews from industry professionals, and a survey of 134 respondents were triangulated to test six hypotheses, while relating to the Theory of Planned Behavior and Consumer Culture Theory. Quantitative findings revealed modest but significant effects of health and wellness on both intentions to reduce alcohol consumption and NA adoption, highlighting an intention-behavior gap. Retail visibility, particularly increased in-store availability, emerged as the strongest predictor. Social norms and economic/product design factors showed no significant influence, indicating normalized moderation and price/format inelasticity.

Qualitative insights emphasized supply growth, premiumization, and coexistence among current options. This study contributes to understanding the sober movement as a multi-dimensional cultural shift, with strategic implications for FMCG brands: prioritizing retail push, innovation, and strategic marketing over reliance on previous messaging or economic incentives alone.

Keywords: sober movement, non-alcoholic beverages, health and wellness, retail visibility, premiumization, intention-behavior gap

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Sumario

O movimento sóbrio, caracterizado pelo aumento das tendências de "sober-curious" e consumo consciente, tem remodelado a indústria de bens de consumo rápido (FMCG) de bebidas, com produtos sem álcool e de baixo teor alcoólico a ganharem tração junto das gerações mais jovens. Uma abordagem mista investigou como as atitudes e intenções dos consumidores em relação à saúde, bem-estar e outros fatores adicionais influenciam a intenção de compra de bebidas sem álcool.

Foi realizada uma revisão de literatura, dez entrevistas com profissionais da indústria e um inquérito a 134 respondentes, triangulados para testar seis hipóteses, relacionando-se com a Teoria do Comportamento Planeado e a Teoria da Cultura do Consumidor. Os resultados quantitativos revelaram efeitos modestos mas significativos da saúde e bem-estar tanto na intenção de reduzir o consumo de álcool como na adoção de bebidas sem álcool, destacando uma lacuna intenção-comportamento. A visibilidade no retalho, particularmente o aumento da disponibilidade em loja, destacou-se como o preditor mais forte. As normas sociais e os fatores económicos/design de produto não mostraram influência significativa, indicando uma normalização da moderação e inelasticidade de preço/formato.

As perspetivas qualitativas enfatizaram o crescimento impulsionado pela oferta, a premiumização e a coexistência com as opções atuais. Este estudo contribui para a compreensão do movimento sóbrio como uma mudança cultural multidimensional, com implicações estratégicas para as marcas FMCG: priorizar a pressão no retalho, a inovação e o marketing estratégico, em vez de depender unicamente de mensagens anteriores ou incentivos económicos.

Palavras-chave: movimento da sobriedade, Bebidas não alcoólicas, saúde e bem-estar, visibilidade no retalho, premiumização, lacuna entre intenção

Título: Fatores impulsionadores do movimento da sobriedade na indústria de bebidas de grande consumo

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List of Abbreviations

CAGR – Compound Annual Growth Rate

CCT – Consumer Culture Theory

CPI – Consumer Price Index

FMCG – Fast-Moving Consumer Goods

NA – Non-alcoholic

RBT – Resource-Based Theory

TAAC - Temporary Alcohol Abstinence Challenges

TBP – Theory of Planned Behavior

WHO – World Health Organization

1. Introduction

Research Question: How do consumer attitudes and behaviors influence their purchase intention for low/no-alcohol beverages?

Historically, alcoholic beverages have played a central role in social life, embedded in rituals of celebration, connection, and cultural identity. In recent years, however, these traditions have begun to shift. Younger generations are reevaluating the role that alcohol plays in their lives, placing greater emphasis toward wellness, mental clarity, and mindful consumption. This is reflected through measured behavior: college students reporting no alcohol use increased from approximately 20% in 2002 to 30% in 2018, while adults under 35 have shown a steady decline in alcohol consumption over the past two decades (Johnson, 2024). This transformation shows a broader cultural redefining of social engagement and personal identity, creating a shift from traditional indulgences to balanced choices.

Alongside the cultural shifts, the rise of the "sober-curious" and "mindful drinking" movements has accelerated the expansion of non-alcoholic (NA) and low-alcohol beverage categories. These changes come with both opportunities and pressures for established beverage brands and fast-moving consumer goods (FMCG) firms, many of which are rethinking product expansion and strategies. Industry reports confirm growth in the no/low-alcohol category, with global sales surpassing $11 billion in 2023 and projected to continue expanding, driven by younger demographics seeking alternatives that align with health, productivity, and lifestyle values (Bopgun, 2024). These products are not necessarily replacing alcoholic beverages outright but are coexisting with the broader consumption market.

Despite an increase in commercial and cultural significance, academic research remains relatively limited. Much of the existing literature focuses on consumer motivations, with less attention to psychological mechanisms, organizational perspectives, and supply-side dynamics, shaping categorical development. In particular, there is a lack of analysis examining how these drivers interact within the FMCG context.

This study addresses this gap by examining how health and wellness attitudes, social influences, and market conditions shape consumer purchasing decisions relating to non-alcoholic and low-alcohol beverages. By combining survey data with qualitative insights from industry professionals, the research aims to better understand the drivers of the sober movement and its implications for firms operating in the contemporary beverage landscape.

2. Literature Review

2.1 The Changing Landscape of the FMCG Beverage Market

2.1.1 Consumption Trends

The FMCG industry has undergone continuous transformation, driven by technological advancement, globalization, and shifting consumer values (Kelly, 2018). Historically, beverage companies emphasized indulgence and sociability when promoting their products. Brands like Don Julio, Absolut, and Heineken, have different promotional approaches for their consumer base, but all link their brand to social rituals and the celebrations associated with consumption. Reports from McKinsey (2023) and IWSR (2024) highlight a consistent decline in alcohol consumption among younger demographics, coupled with a rise in low and no-alcohol product launches. According to IWSR, there was a 1% CAGR decline in alcohol volumes in the US between 2019-2024, while non-alcohol volume grew 28% (Bopgun, 2024). In 2024, IWSR reported that 30% of no/low alcohol consumers from the top 10 markets indicated they would have previously chosen full-strength alcoholic beverages on those occasions.

2.1.2 Health and Wellness

In 2023 the World Health Organization (WHO) released an article detailing health-related consequences from drinking alcohol, emphasizing that "no level of alcohol consumption is safe for our health." The WHO regards alcohol as, "a toxic, psychoactive, and dependence-producing substance… classified as a Group 1 carcinogen by the International Agency for Research on Cancer" (World Health Organization, 2023). This classification places alcohol in the highest risk category, alongside tobacco, radiation, and asbestos. The WHO states seven types of cancer can be linked to alcohol, including two of the most common, bowel and female breast cancer, and risk increases with the rate of consumption. Cancer is not the only illness directly associated with alcohol use. Even moderate drinking can lead to cardiovascular complications, liver disease, and a range of mental-health concerns.

This messaging, among others, has helped drive a shift in public conversation surrounding alcohol and health, toward movements focusing on mindful consumption, temporary abstinence, and adoption of alcohol-free beverage alternatives. As wellness becomes central to consumer identity, consumers evaluate drinking behavior not just in a social context, but through personal health, mental state, and longevity perspectives. This re-evaluation of alcohols place in consumer daily life creates a foundation for the rising ‘sober-curious” and low/no-alcohol trends explored deeper in this review.

The concept of “mindful consumption” reflects a broad movement towards consumers adopting a more balanced and wellness-focused lifestyle. In the past it was trendy to temporarily abstain from drinking for short periods such as “Sober October” and “Dry January”, also known as Temporary Alcohol Abstinence Challenges (TAACs) (Sober-Curious, 2024). Participants report that their motivations driving these periods stem from the improvements on overall wellness, sleep quality, and weight management goals. After these temporary challenges concluded, 15% of participants reported maintaining abstinence. This suggests that wellness-driven goals can trigger behavior change, supporting the connection between mindful consumption and visible health outcomes.

A randomized, controlled study in Japan found that participants who were provided with non-alcoholic beverages over a twelve-week period reduced their alcohol consumption by an average of 11.5 grams per day when compared to controls. This persisted within the group for eight more weeks after the intervention was introduced to the group (Tsukuba University, 2023). The authors conclude that “providing non-alcoholic beverages may be a new approach to behavioural modification that facilitates reduced alcohol consumption” (Yoshimoto et al., 2023). This helps to show that non-alcoholic alternatives are not just symbolic of wellness but can be used as tools to reduce health risks associated with alcohol use.

In parallel with the wellness focused pivot, recent industry discussion highlights the rise in non-alcoholic beverage brands incorporating ingredients such as adaptogens into production. Carlson 2023 notes that the low-to-no-alcohol category ‘surpassed $11 billion in 2022 … up from $8 billion in 2018’ and is ‘predicted to increase by a third in 2026,’ driven primarily by non-alcoholic product innovation. The article explains how many “sober-curious” consumers are seeking a “healthier happy hour” by leaning towards a stress reducing alternative. The inclusion of adaptogens emphasizes how trends are shifting not just away from alcohol, but aligning consumption with broader health goals (Carlson, 2023 Entrepreneur).

The shift to incorporate wellness-driven beverage behaviors is apparent when examining non-alcoholic alternatives and trends. Additionally, wellness initiatives are highly psychologically motivated. Research on mindfulness and readiness to change drinking patterns has found that higher levels of trait mindfulness correlate with greater readiness to reduce alcohol consumption (Hamza et al., 2023). These authors consider how, “mindfulness might play an important role in reducing problematic alcohol use” (Hamza et al., 2023). The implications in this research highly regard the “sober-curious” trend as not just a health or social fad, but a deep anchor in self-regulation and wellbeing. Additional market research confirms that the beverage sector as a whole is seeing a rise in consumer demand for “health, flavor” and acknowledgement that “brands must understand emerging non-alcoholic beverage trends to capture a rapidly growing audience” (Miller, 2024).

The growing demand for alcohol-free alternatives has introduced new health and safety consideration in terms of production. The emittance of ethanol from products removes a natural microbial barrier, forcing manufacturers to adopt alternative preservation and stabilization methods. To safely produce non-alcoholic beverages many companies are implanting substitutions through pasteurization or added preservatives (Navigating the Path to Stability, 2024). Each of these methods have specific trade-offs that influence consumer health, in addition to cost and product quality. Pasteurization offers greater microbial control with less chemical use, but this can have impact on flavor, higher production costs, and brewing foundations. In contrast, preservatives are more cost-effective and offer longer shelf stability, but they might alter flavor profiles and have high safety regulations (Navigating the Path to Stability, 2024). In the end, these decisions are not universal and must be determined by which route represents the brand and consumer values best.

Overall, there is still much to understand about the implications of alcohol on health and wellness, and how this shapes the way consumers engage with beverage choices. The growing focus on wellness, mindfulness, and longevity, has redefined drinking culture from one of indulgence to one of intentionality. As global health authorities, behavioral research, and innovation align with reducing the risks of alcohol, wellness has turned into a personal and commercial priority. This results in an increase in moderation, self-care, and informed decisions not as trends, but as a dimension of lifestyle and identity.

2.1.3 Innovative New Products

The convergence of evolving consumer paradigms and accelerated technological advancements has positioned the beverage industry at the epicenter of one of the most rapid transformations within the broader FMCG sector. This market shift is fundamentally driven by the escalating demand for health-conscious alternatives and a broader trend toward mindful consumption.

Brands across the world are innovating to capture the rapidly growing sober-curious segment. Heineken's 0.0 campaign "0.0 Reasons Needed" frames non-alcoholic beer as a valid choice for any occasion, helping reflect their strategic shift from the typical abstinence association (Heineken, 2025). Simultaneously, Seedlip entered the non-alcoholic spirits category by positioning its product as "not second best", offering a more sophisticated product to enter in the premium industry (Institute of Alcohol Studies, 2022). Industry data corroborates these shifts, showing that the low/no-alcohol category is forecasted to grow at a CAGR of approximately 7% between 2024-2028, which outpaces the traditional full-strength alcohol growth rates (Bopgun, 2024).

Naked Life, one of the first in Australia, launched a line of non-alcoholic classic cocktails, highlighting not only their non-alcoholic composition but also their low-calorie and zero-sugar benefits (Strang, 2023). The company's brand message challenges the "status quo," emphasizing that consumers can enjoy elevated, sophisticated beverages without compromise. This approach clearly resonates, since 9.4 million Australians (47% of the population) reported purchasing a non-alcoholic spirit or drink in three months (Strang, 2023).

In the United Kingdom, Lucky Saint introduced a 0.5% ABV beer providing a low alcohol option over 1,000 pubs (Lucky Saint, 2025). Growth data shows beer accounts for 57% of no/low launches in Europe, with brands such as Guinness and Peroni delivering zero-alcohol variants to meet shifting demand (Critchlow, 2025).

Beyond the reformulation of traditional cocktails and familiar drinks, the beverage industry is exploring functional innovation, and developing products that incorporate ingredients associated with mental clarity, stress reduction, and physical wellbeing. According to Symrise Insight (2025), products infused with botanicals, adaptogens, nootropics, and natural energy sources are gaining substantial traction across the FMCG sector. These beverages are not just cocktails without alcohol; they introduce an entirely new value proposition centered on enhancing wellness rather than substituting for intoxication.

Companies such as Recess and Kin Euphorics have built brands around adaptogenic, and mood-balancing blends designed to promote calm and focus, marketing themselves as “drinks for the modern mind” (Recess, 2024; Kin Euphorics, 2024). Similarly, ZOA Energy, co-founded by Dwayne “The Rock” Johnson, has entered the market with products formulated from vitamins, electrolytes, and green tea caffeine, targeting performance and vitality rather than traditional stimulation associated with alcohol or sugar-heavy energy drinks (ZOA Energy, 2024).

Emerging wellness brands such as De Soi (an aperitif alternative with natural botanicals and adaptogens) and Moment (a sparkling adaptogen drink that “mimics meditation”) are further redefining the category by blending sensory enjoyment with health-oriented benefits (Moment, 2024; Soi, D, 2025). Together, these brands demonstrate that innovation in the sober and functional beverage space extends well beyond imitation, it represents the creation of entirely new consumption occasions that merge indulgence with intention and wellness.

Reframe, a cannabis spirit, has positioned itself as fast-acting THC beverage option (Reframe, 2024). According to the brand, Reframe is “an all-natural spirit with all of the buzz and none of the alcohol – made from organic, hemp-derived cannabis with 10 mg THC per 2 oz serving.” The positioning emphasizes “0% ABV … no hangover … 10 mg hemp-derived THC per serving” and states: “Feeling good shouldn’t cost you tomorrow.” The brand invites consumers to “Rethink your drink,” bridging the familiar social ritual of cocktail hour with a wellness-oriented alternative. In this way, Reframe challenges traditional alcohol-led sociability by offering a product marketed for both the mood elevation (via THC) and the absence of alcohol’s negative effects, a combination that appeals to the sober-curious, wellness-oriented, and mindful-drinking segments. Additionally, industry commentary indicates that the infusion-beverage category is emerging precisely because “people today are looking for ways to enjoy social experiences without the downsides of alcohol” (Skibo, 2024).

2.1.4 Financial and Economic Context

The beverage industry continues to navigate a volatile financial landscape marked by persistent inflation and changing consumer spending habits. According to Upson (2024), the most popular cocktails of 2024 experienced price increases between 4 and 10 percent compared to the previous year, well above the 3.0 percent rise in the Consumer Price Index (CPI) reported by the U.S. Bureau of Labor Statistics (2024) for the same period. This widening gap suggests that the hospitality and beverage sectors are absorbing higher production, ingredient, and labor costs that extend beyond general inflation.

Industry analysts have drawn attention to the contradictory pricing of alcohol-free options. Allison Arnold (2024), writing for *Delish*, questions why cocktails have become increasingly expensive, attributing the trend to "premiumization," evolving consumer tastes, and the rising cost of alcohols. Interestingly, she notes that mocktails and low-alcohol alternatives often maintain similar price points to their alcoholic counterparts despite the removal of spirits, highlighting how consumers are paying for perceived craftsmanship, experience, and novelty rather than alcohol content itself. This pricing parity may reinforce the notion that non-alcoholic beverages are not just substitutes but new premium lifestyle products within the FMCG ecosystem.

The broader financial climate is also shaping consumer behavior. A 2023 Angus Reid Institute survey found that over 70 percent of Canadians report "feeling the financial pinch of rising costs," with dining out and entertainment among the first discretionary categories to be reduced (Kurl et al., 2023). Similarly, Kaplan (2023) reports that younger consumers, particularly Gen Z and Millennials, are re-evaluating spending priorities, focusing on "financial resilience" and value-driven consumption following the pandemic. These findings align with McKinsey's (2023) consumer-insights report, which concludes that pandemic-era adaptations, such as prioritizing convenience, planning purchases, and cutting back on non-essential indulgences, have shifted from short-term responses to enduring behavioral norms.

In this context, the appeal of low/no-alcohol beverages extends beyond health or lifestyle considerations. It also represents a financially strategic choice, enabling consumers to engage in social experiences while managing discretionary spending. Alcohol-free nights or sober-curious consumption patterns may thus reflect both economic practicality and wellness orientation, reinforcing how financial pressures intersect with evolving attitudes toward indulgence, self-control, and value.

2.2 Management Theory Implications

2.2.1 Theory of Planned Behavior

The Theory of Planned Behavior (TPB) provides an understanding of the cognitive processes that influence intentional behavior. The model address three components that link intention to behavior performance, which are attitude toward behavior, subjective norms, and perceived control. Altogether these consider whether an individual has a positive or negative judgement of the action, if there are any social pressures or expectations, and individual perception of their ability to execute the behavior (Ajzen, 1991). These in culmination help understand indentions that lead to behavior. The TPB has been applied across various areas of consumer behavior, including health choices and ethical consumption, because of its ability to explain intention-driven decision-making (Fishbein et al, 2010).

The TPB framework aligns with the decision-making patterns associated with sober-curious consumers. Consumers view alcohol reduction as a health-positive and empowering choice to improve sleep productivity, mental clarity, and over all wellbeing (Sober-Curious, 2024). These are all positive attitudes associated with limiting intake, that strengthen intentions. Additionally, subjective norms are evolving and significantly impact this movement. Younger consumers report greater acceptance of not drinking, in some cases, sobriety signifies lifestyle balance (Bopgun, 2024). Expectations are changing as sober-curious influencers, alcohol-free events, and dry restaurants and bars begin to enter the market. Lastly, perceived control increases with the growing availability of low/no-alcohol products that replicate traditional social experiences (Functional Non-Alcoholic Beverages, 2025). Consumers have more confidence in making sober decisions, without sacrificing their social life or entertainment. This all leads to strength in intention, that then translates to consistent change.

This framework helps interpret the drivers of the sober movement in the FMCG sector, by linking consumer thoughts and processes with observable behavior. The shift in attitudes, social norms, and control, directly affect the adoption of low/no-alcohol products. TPB also allows researchers to connect individual motivation to market-level disruption. As behavioral intentions evolve, they influence purchasing patterns, product development, and long-term strategic shifts within the beverage industry. The Theory of Planned Behavior not only helps explain why consumers reduce alcohol intake but also illustrates how micro-level decisions can transform the industry’s future.

2.2.2 Consumer Culture Theory

Consumer Culture Theory (CCT) determines how consumers behave through social, cultural, and identity-based contexts. In this, consumers are not independent decision-makers, but participants in a cultural system where products and brands hold symbolic meaning. According to Arnould and Thompson (2005), CCT explores the “dynamic relationships among consumer actions, the marketplace, and cultural meanings.” This theory emphasizes that consumption choices are expressions of identity and lifestyle. Consumers communicate who they are and their values through the brands they interact with and use. In this sense, consumer behavior is both a personal and social act, a reflection of one’s values, social class, and generational identity (Arnould, 2006).

Practically, CCT provides an ideal viewpoint to understand how the sober-curious movement transcends individual choice and becomes a cultural identity. For many people, choosing low/no-alcohol beverages is not only a health decision, but a form of self-expression and social signaling. The rise of “sober influencers” and alcohol-free social events illustrate how abstaining from alcohol has evolved into a lifestyle change rather than a private behavior. Within this framework, brands like Seedlip, Reframe, and recess are seen as symbols with products that align with progressing consumer values. Their goal isn’t just to replace traditional drinks, but to redefine what social participation looks like.

CCT helps explain how generational shifts shape this trend. Younger consumers associate drinking less as a rebellion or shift against old norms, rather than conformity. This reflects what Thompson and Hirschman (1995) can “identity work” or the process where consumers apply meaning through symbolism. Choosing non-alcoholic options over alcoholic is their way of aligning with modern values and self-care.

2.3 Firm-Level Drivers: Strategic and Organizational Perspectives

2.3.1 Resourced-Based Theory

Resource-Based Theory (RBT) considers firms to be bundles of resources and capabilities that provide competitive advantage when they are valuable, rare, inimitable, and non-substitutable (VRIN). These can be tangible and intangible resources to create economic value. RBT in combination with Brandenburger and Stuart’s value creation framework adds in the consideration of customers willingness to pay and production costs (Barney et al. 2021). When a firm’s resources create more economic value, they generate superior firm performance in their market.

When considering the FMCG industry, specifically brands like Reframe, Seedlip, and Athletic Brewing Co., RBT framework is useful for explaining how some brands outperform others. Brands that align products with wellness and health-conscious lifestyles are leveraging valuable positioning. This increases willingness to pay and differentiates products from traditional alcohol brands. Early-movers in the alcohol-free space (functional beverages, adaptogen-infused, etc.) have rare capabilities and access to emerging supply networks that are not as available for the rest of the FMCG market.

2.3.2 Dynamic Capabilities Theory

Dynamic capabilities theory extends the resource-based view (RBV) by explaining how firms in rapidly changing environments sustain competitive advantage through the ability to sense, seize, and transform opportunities (Teece et al., 1997; Teece, 2018). While RBT focuses on valuable, rare, inimitable, and organized (VRIO) resources for static competitive advantage (Barney, 1991; Barney et al., 2021), dynamic capabilities emphasize ongoing processes of resource reconfiguration and allocation, in response to market shifts, technological changes, and customer preferences.

In the FMCG beverage sector, dynamic capabilities are especially important as firms respond to the sober movement and expansion of non-alcoholic categories. Firms must sense emerging trends such as health consciousness, mindful drinking, and demand for functional, non-alcoholic alternatives (Jagger, 2025; Symrise Insight, 2025). They then seize these opportunities by developing or adapting product portfolios (e.g., launching NA variants of flagship brands (Heineken 0.0) or investing in premiumization and clean-label innovation). Finally, transformation involves reconfiguring internal processes, supply chains, and distribution to support sustained growth in a category.

Recent studies highlight the application of dynamic capabilities in food and beverage contexts. For instance, research on sustainability integration in food processing demonstrates how reiterative development of sensing, seizing, and transforming capabilities enables firms to embed new practices and maintain relevance in dynamic markets (Gruchmann, 2021). Similarly, analyses of product and process innovation in the food and drink industry show that dynamic capabilities help manage complexity and drive performance in fast-evolving categories (Teece, 2018).

In the context of the sober movement, dynamic capabilities explain why leading FMCG players (e.g., AB InBev, Heineken) have successfully entered the NA space through agile innovation, while smaller brands face barriers due to limited reconfiguration resources. This theory provides a framework for understanding how firms respond to cultural shifts toward moderation and wellness, bridging static resource advantages with adaptive strategic processes.

3. Methodology

3.1 Research Design

This study used a mixed-method approach, combining qualitative interviews with a qualitative survey. Thus, allowing for exploratory insight through first-hand industry perspectives and a statistical analysis of consumer behavior. Interviews were used to identify themes, perceptions, and firm-level responses to the impact of consumptions choices, while survey responses added to these insights by measuring behavioral patterns, motivations and consumer perceptions.
A deductive approach was applied to research through existing literature and theories (such as Theory of Planned Behavior, Consumer Cultures Theory, and Resource-Based Theory) to inform the creation of hypotheses and construct measurement.

3.2 Qualitative Data Collection

To obtain industry perspectives and content, 10 semi-structured interviews were conducted with professionals related to the beverage industry. These interviews lasted for approximately 45-60 minutes, based on a list of predetermined conversation topics. Each interview was approached in a similar pattern but also left flexible for natural conversation about relative topics. The main topics addressed were perceived drivers of the sober movement, firm-level strategic responses, barriers, market innovation, and future outlooks. Each interview was recorded and transcribed with consent for analysis.

Insights gained from the interview phase helped with the design of the quantitative survey. Specifically, behavioral, situational, and perceptional questions were derived from details given by interviewees.

Table 1: Overview of Industry Experts

#	Interview ID	Location	Position
1	Expert 1	United States	Founder and Owner
2	Expert 2	United States	Senior Purchasing Manager
3	Expert 3	United States	Vice President – Beverage Wholesaler
4	Expert 4	United States	Non-Alcoholic Beverage Portfolio Manager
5	Expert 5	United States	Wine Industry Professional, CEO and Founder
6	Expert 6	United States	Director of Marketing
7	Expert 7	Italy	Management Consultant
8	Expert 8	Germany	Category Development Manager
9	Expert 9	United States	CEO Luxury Wine Group
10	Expert 10	United States	Director of Sales

3.3 Quantitative Data Collection

A survey was developed to quantify consumer attitudes, motivations, and behaviors surrounding beverage consumption. The final survey consisted of 36 questions among 7 blocks. Respondents were split into two blocks, a non-alcohol-based block and an alcohol-based block, based on if the respondent had consumed alcohol in the past 6 months. Those who had consumed alcohol were provided a set of questions tailored to their consumption habits, motivations, and possible reasons to reduce their alcohol intake. Respondents presented with the non-alcohol block were asked how often they consume alcohol alternatives, habits, and reasons they avoid alcohol. All respondents were then presented with the same blocks focusing on social norms, FMCG insights, industry perception, and demographics. A total of 175 survey respondents were recorded, with only n=134 viable for testing after filtering through incomplete responses.

4. Results

4.1 Descriptive Statistics

The final quantitative sample consisted of 134 responses after data cleaning and deletion of incomplete responses. The overall age profile (Table 2) of responses fell between the ages of 18-34 (73.9%), aligning with the generation highlighted greatly in the literature review. This comprised 45.5% in the 18–24 bracket and 28.4% in the 25–34 bracket. This youthful profile aligns closely with the generational focus highlighted in the literature review, where Gen Z and younger Millennials are repeatedly identified as the primary drivers of the sober-curious movement and the growing demand for low/no-alcohol beverages (Jagger, 2025; McKinsey, 2023). This age skew also introduces a limitation, for the perspectives of older generations, who tend to exhibit greater loyalty to traditional consumption habits.

The gender distribution was relatively split, with females representing 61.9% and males 38.1% of the total sample size. This saturation of younger participants is expected with majority of the respondents being found through social media and personal networks.

An important distinction between respondents was their prevalence to consume alcohol (Table 3) and if they have consumed alcohol in the past 6 months. Almost 92% of respondents reported consuming alcohol within the past 6 months, with 49% recording that they drink alcohol occasionally, 28% drinks alcohol regularly, and 14% rarely drinks alcohol. It is important to note that the majority of respondents do not consume alcohol regularly.

Table 2: Demographics Sample

Demographic Variable	Category	Frequency	Percentage
Gender			
	Female	51	38.1%
	Male	83	61.9%
Age Group			
	18-24	35	26.1%
	25-34	64	47.8%
	35-44	8	6.0%
	45+	23	17.2%
Yearly Income			
	No Answer	1	0.7%
	100,000+	29	21.6%
	$40,000 - $59,999	14	10.4%
	$60,000 - $79,999	27	20.1%
	$80,000 - $99,999	12	9.0%
	Less than $40,000	30	22.4%
	Prefer not to say	21	15.7%
Employment Status			
	A homemaker or stay-at-home parent	4	3.0%
	Retired	10	7.5%
	Student	22	16.4%
	Unemployed and looking for work	3	2.2%
	Working full-time	76	56.7%
	Working part-time	19	14.2%
Country of Residence			
	Albania	1	0.7%
	Austria	1	0.7%
	Germany	7	5.2%
	Hungary	2	1.5%
	Italy	1	0.7%
	Mexico	1	0.7%
	Portugal	9	6.7%
	United States	112	83.6%

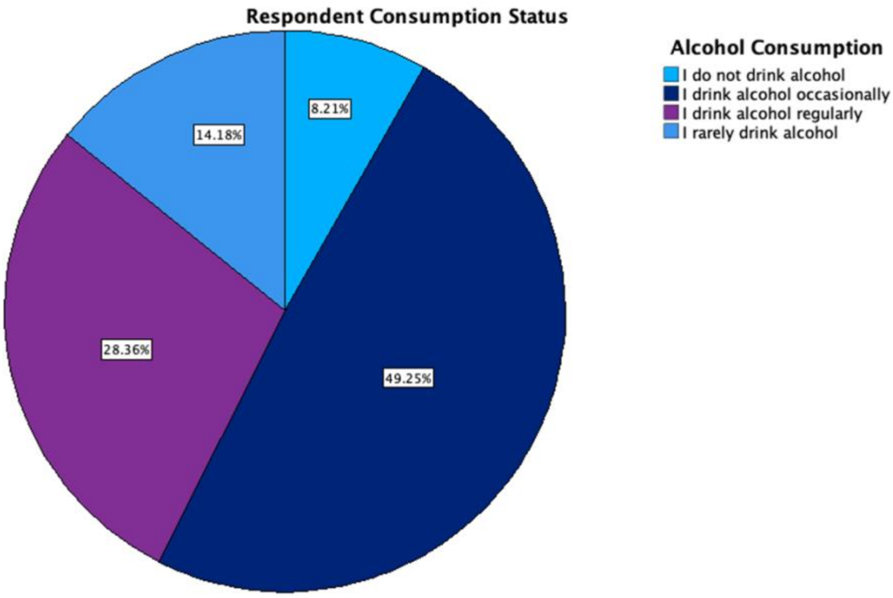

Figure 1: Respondent Consumption Status

Regarding socio-economic backgrounds (Table 2) of the sample, 76 of the respondents recorded working full-time (56.7%), followed by 22 recording that they are students (16.4%), and 19 part-time employees (14.2%). This is a high level of employment, and interesting when comparing employment status and yearly income. A Chi-Square test was performed to examine this relationship. As illustrated in Table 4, full-time workers reported higher income levels, and students and part-time workers were more likely to report lower incomes or prefer not to say (63.6% and 42.1%). Employment status was meaningfully linked to the income distribution collected in this sample.

Table 3: Respondent Consumption Frequency

Alcohol Consumption Frequency		
I do not drink alcohol	11	8.2%
I drink alcohol occasionally	66	49.3%
I drink alcohol regularly	38	28.4%
I rarely drink alcohol	19	14.2%
Consumed Alcohol in the Past 6 Months		
No	11	8.2%
Yes	123	91.8%

Table 4: Employment and Income Relationship

Chi-Square Tests

	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	105.867[a]	30	<.001
Likelihood Ratio	115.467	30	<.001
N of Valid Cases	134		

a. 36 cells (85.7%) have expected count less than 5. The minimum expected count is .02.

4.2 Qualitative Analysis

Qualitative insights obtained from industry experts revealed convergence and uncertainty in how the sober movement is understood and addressed across the beverage industry. Across the interviews, health and wellness emerged as the most frequent cited driver, referenced explicitly by nearly all participants regardless of role or market segment. Interviewees consistently associated reduced alcohol consumption with broader cultural shifts toward longevity, functional benefits, and personal performance, rather than solely substance. This was especially noted among experts working in non-alcoholic beverages, retail strategy, and large FMCG organizations, who described the sober movement as part of a wider recalibration of everyday consumption norms rather than rejection of alcohol itself.

At the same time, there was notable variation in how non-alcoholic alternatives were evaluated, particularly when comparing perspectives from premium and luxury producers to distribution-focused professionals. Several participants, specifically ones involved in non-alcoholic brands, described non-alcoholic beverages as effective tools for behavioral moderation and social inclusion, emphasizing improved product quality, expanded availability, and greater social acceptance. In contrast, experts from premium and luxury backgrounds raised concerns related to ingredient transparency, energy-intensive production methods, and misalignment between non-alcoholic processing techniques and sustainability values. Several interviewees emphasized a critical distinction between non-alcoholic substitutes designed to replicate alcoholic products (such as beer, wine, or spirits) and non-alcoholic beverages that are not intended as direct replacements. Participants noted that the production process, ingredient requirements, and strategic implications of sodas and water-based beverages differ substantially from those of non-alcoholic beers or wines. Critiques like these appeared repeatedly in interviews with producers operating at the higher end of the market, suggesting that skepticism

toward non-alcoholic alternatives is more pronounced among firms whose brand values are rooted in craftsmanship, terroir, and authenticity. This skepticism should not be interpreted as fear of competition; rather, premium producers do not view the movement as a direct threat to their business model, particularly when their core clientele remains stable and committed.
Across interviews with senior leaders and founders, a consistent pattern emerged in how the sober movement was interpreted at the strategic level. These respondents, each with long-term decision-making authority, were more likely to frame the movement as a cultural shift rather than an immediate threat, emphasizing brand integrity, portfolio discipline, and long-term value creation over implementing rapid changes or imitations. Their responses contrasted with more strategic viewpoints by highlighting that organizational position and responsibility shape how firms perceive and adapt to changing environments.

The interviews also highlighted distinct strategic interpretations of the sober movement across firm types. Large FMCG and non-alcoholic beverage companies primarily framed the movement as an opportunity for innovation, pointing to investments in zero-sugar formulations, functional ingredients, single-serve packaging, and occasion-based consumption formats. In contrast, premium alcohol producers emphasized reinforcing existing brand values (such as quality heritage, and responsible consumption) as a way to remain resilient among declining trends. Distribution and sales-focused interviewees frequently occupied a middle position, acknowledging demand for low/no-alcohol options while stressing practical constraints such as shelf space, pricing expectations, and production costs. Across all groups, however, interviewees repeatedly emphasized the importance of sensing and responding, underscoring that strategic success depends on a firm's ability to interpret change and allocate resources.

4.3 Quantitative Data Analysis and Hypothesis Testing

4.3.1 H1a: Individuals who place higher importance on health and wellness will report a higher likelihood of reducing their alcohol consumption.

A linear regression was conducted to examine the relationship between the importance placed on health and wellness (independent variable) and respondents' thoughts about reducing alcohol consumption (dependent variable). The model indicated weak explanatory power with an R^2 of 0.038, suggesting that only 3.8% of respondents reduce alcohol consumption based on health implications. The standard error of the estimate is .74485.

The overall model is statistically significant (F(1, 132) = 5.148, p = .025). The regression coefficient for health and wellness is positive and significant (B = .136, SE = .060, β = .194, t = 2.269, p = .025), suggesting that higher importance placed on health and wellness is associated with a greater likelihood of thought to reduce alcohol consumption. Table 5 presents the complete regression results for reference.

Table 5: H1a: Linear Regression

Model Summary

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.194[a]	.038	.030	.74485

a. Predictors: (Constant), Health and Wellness

ANOVA[a]

Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	2.856	1	2.856	5.148	.025[b]
	Residual	73.233	132	.555		
	Total	76.090	133			

a. Dependent Variable: Thought about reducing alcohol

b. Predictors: (Constant), Health and Wellness

Coefficients[a]

Model		Unstandardized Coefficients		Standardized Coefficients	t	Sig.
		B	Std. Error	Beta		
1	(Constant)	.593	.241		2.466	.015
	Health and Wellness	.136	.060	.194	2.269	.025

a. Dependent Variable: Thought about reducing alcohol

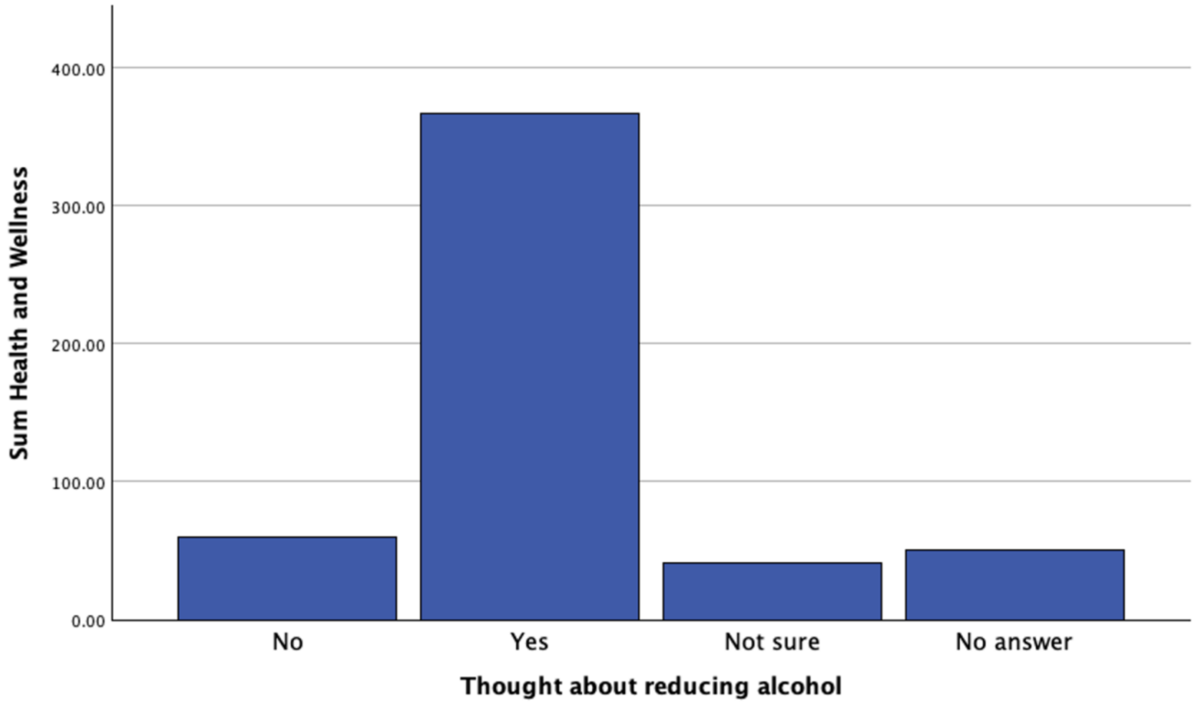

Figure 2: Alcohol Reduction Consideration

These findings support H1a, and therefore the null hypothesis is rejected.

4.3.2 H1b: Individuals who place higher importance on health and wellness will be more likely to consume non-alcoholic alternatives.

A linear regression was conducted to examine the relationship between the importance placed on health and wellness (independent variable) and the binary measure of non-alcoholic alternative consumption (dependent variable). The model summary revealed an R^2 of 0.068, indicating that health and wellness importance explains only 6.8% of the variance in the consumption of NA alternatives. The standard error of the estimate is .47337.

The overall model is statistically significant ($F(1, 118) = 8.593$, $p = .004$). The regression coefficient for health and wellness is positive and significant ($B = .121$, $SE = .041$, $\beta = .261$, $t = 2.931$, $p = .004$), suggesting that higher importance placed on health and wellness is associated with a greater likelihood of consuming non-alcoholic alternatives. Table 6 presents the complete regression results for reference.

Table 6: H1b Linear Regression

Model Summary

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.261[a]	.068	.060	.47337

a. Predictors: (Constant), Health and Wellness

ANOVA[a]

Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	1.925	1	1.925	8.593	.004[b]
	Residual	26.441	118	.224		
	Total	28.367	119			

a. Dependent Variable: yes and no binary

b. Predictors: (Constant), Health and Wellness

Coefficients[a]

Model		Unstandardized Coefficients B	Unstandardized Coefficients Std. Error	Standardized Coefficients Beta	t	Sig.
1	(Constant)	-.083	.165		-.503	.616
	Health and Wellness	.121	.041	.261	2.931	.004

a. Dependent Variable: yes and no binary

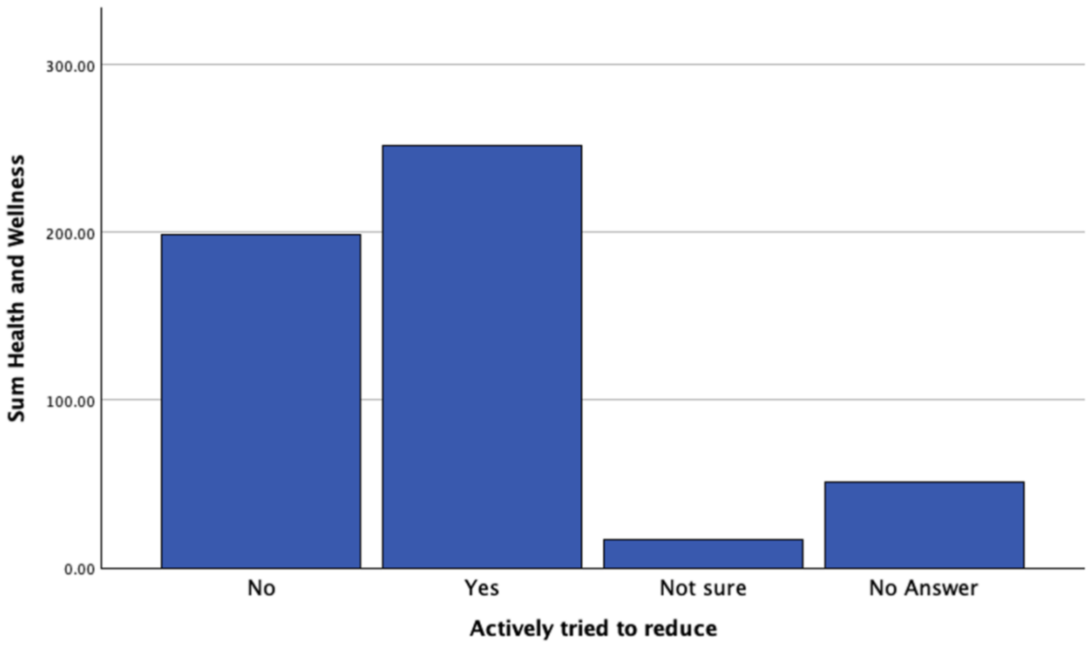

Figure 3: Active Alcohol Reduction and Health and Wellness

These findings support H1b, and therefore the null hypothesis is rejected.

4.3.3 H2: Higher levels of perceived social pressure to drink will be associated with higher alcohol consumption frequency.

A linear regression was conducted to examine the relationship between perceived social pressure to drink alcohol (independent variable) and alcohol consumption frequency (dependent variable). The model summary shows a multiple correlation coefficient (R) of .091, with an R^2 of .008 (adjusted R^2 = .000), indicating that approximately 0.8% of the variance in alcohol consumption frequency is explained by perceived social pressure to drink. The standard error of the estimate is 1.11132.

The overall model is not statistically significant ($F(1, 121) = 1.021$, $p = .314$). The regression coefficient for perceived social pressure is positive but not significant ($B = .077$, $SE = .077$, $\beta = .091$, $t = 1.011$, $p = .314$), suggesting no reliable association between higher perceived social pressure and higher frequency of alcohol consumption. Table 7 presents the complete regression results for reference.

Table 7: H2 Linear Regression

Model Summary

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.091[a]	.008	.000	1.11132

a. Predictors: (Constant), I feel pressure to drink alcohol

ANOVA[a]

Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	1.261	1	1.261	1.021	.314[b]
	Residual	149.438	121	1.235		
	Total	150.699	122			

a. Dependent Variable: alcohol_consumption_frequency

b. Predictors: (Constant), I feel pressure to drink alcohol

Coefficients[a]

Model		Unstandardized Coefficients		Standardized Coefficients	t	Sig.
		B	Std. Error	Beta		
1	(Constant)	2.969	.238		12.501	<.001
	I feel pressure to drink alcohol	.077	.077	.091	1.011	.314

a. Dependent Variable: alcohol_consumption_frequency

These findings do not support H2, and therefore the null hypothesis is not rejected.

4.3.4 H3: Greater perceived social acceptability of non-alcoholic beverages will be associated with higher consumption of non-alcoholic alternatives.

A linear regression was conducted to examine the relationship between perceived social acceptability of non-alcoholic beverages (independent variable) and consumption of non-alcoholic alternatives (combined measure from Q14 and Q16, dependent variable). The model summary shows a multiple correlation coefficient (R) of .121, with an R^2 of .015 (adjusted R^2 = .007), indicating that approximately 1.5% of the variance in non-alcoholic alternative consumption is explained by perceived social acceptability. The standard error of the estimate is .48773.

The overall model is not statistically significant ($F(1, 129) = 1.929$, $p = .167$). The regression coefficient for perceived social acceptability is positive but not significant ($B = .058$, $SE = .042$, $\beta = .121$, $t = 1.389$, $p = .167$), suggesting no reliable association between greater perceived social acceptability and higher consumption of non-alcoholic alternatives. Table 8 presents the complete regression results for reference.

Table 8: H3 Linear Regression

Model Summary

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.121[a]	.015	.007	.48773

a. Predictors: (Constant), NA bev are more socially accepted

ANOVA[a]

Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	.459	1	.459	1.929	.167[b]
	Residual	30.686	129	.238		
	Total	31.145	130			

a. Dependent Variable: Q14 and Q16 combined

b. Predictors: (Constant), NA bev are more socially accepted

Coefficients[a]

Model		Unstandardized Coefficients B	Unstandardized Coefficients Std. Error	Standardized Coefficients Beta	t	Sig.
1	(Constant)	.169	.164		1.033	.304
	NA bev are more socially accepted	.058	.042	.121	1.389	.167

a. Dependent Variable: Q14 and Q16 combined

These findings do not support H3, and therefore the null hypothesis is not rejected.

4.3.5 H4: Individuals who report higher awareness and visibility of non-alcoholic options will be more likely to consume them.

A multiple linear regression was conducted to examine the relationship between awareness and visibility of non-alcoholic options (measured by three items: more advertisements for NA beverages than before, more NA options in stores, and more NA options in restaurants and bars, as independent variables) and consumption of non-alcoholic alternatives (combined measure from Q14 and Q16, as the dependent variable). The model summary shows a multiple correlation coefficient (R) of .233, with an R^2 of .054 (adjusted R^2 = .032), indicating that approximately 5.4% of the variance in non-alcoholic alternative consumption is explained by the visibility/awareness predictors combined. The standard error of the estimate is .48155.

The overall model is marginally non-significant ($F(3, 127) = 2.437$, $p = .068$). Among the individual predictors:

- Perceived increase in NA options in stores showed a positive and statistically significant association ($B = .105$, $SE = .042$, $\beta = .239$, $t = 2.514$, $p = .013$).
- Perceived increase in NA options in restaurants and bars showed a negative and non-significant association ($B = -.065$, $SE = .043$, $\beta = -.157$, $t = -1.523$, $p = .130$).
- Perceived increase in advertisements for NA beverages showed a positive but non-significant association ($B = .013$, $SE = .044$, $\beta = .030$, $t = .299$, $p = .766$).

Table 9 presents the complete regression results for reference.

Table 9: H4 Linear Regression

Model Summary

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.233[a]	.054	.032	.48155

a. Predictors: (Constant), more advertisements for NA beverages than before, more NA options in stores, more NA options in restaurants and bars

ANOVA[a]

Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	1.695	3	.565	2.437	.068[b]
	Residual	29.450	127	.232		
	Total	31.145	130			

a. Dependent Variable: Q14 and Q16 combined

b. Predictors: (Constant), more advertisements for NA beverages than before, more NA options in stores, more NA options in restaurants and bars

Coefficients[a]

Model		Unstandardized Coefficients B	Std. Error	Standardized Coefficients Beta	t	Sig.
1	(Constant)	.193	.169		1.142	.256
	more NA options in stores	.105	.042	.239	2.514	.013
	more NA options in restaurants and bars	-.065	.043	-.157	-1.523	.130
	more advertisements for NA beverages than before	.013	.044	.030	.299	.766

a. Dependent Variable: Q14 and Q16 combined

These findings show partial support H4 regarding higher perceivability of non-alcoholic options in stores associated with the greater likelihood of consumption. Therefore, H4 is partially supported, and the null hypothesis can be rejected.

4.3.6 H5: Individuals with higher price sensitivity will be more likely to choose non-alcoholic options when alcohol prices feel too high.

A multiple linear regression was conducted to examine the relationship between price sensitivity (measured by two items: perception that non-alcoholic beverage alternatives are highly priced, and agreement that alcohol prices feel too high as independent variables) and consumption of non-alcoholic alternatives (combined measure from Q14 and Q16 as the dependent variable). The model summary shows a multiple correlation coefficient (R) of .137, with an R^2 of .019 (adjusted R^2 = .003), indicating that approximately 1.9% of the variance in non-alcoholic alternative consumption is explained by the price sensitivity predictors combined. The standard error of the estimate is .48866.

The overall model is not statistically significant ($F(2, 128) = 1.215$, $p = .300$). Among the individual predictors:

- Perception that non-alcoholic beverage alternatives are highly priced showed a positive but non-significant association ($B = .075$, $SE = .049$, $\beta = .134$, $t = 1.528$, $p = .129$).
- Agreement that alcohol prices feel too high showed a positive but non-significant association ($B = .046$, $SE = .098$, $\beta = .041$, $t = .468$, $p = .641$).

Table 10 presents the complete regression results for reference.

Table 10: H5 Linear Regression

Model Summary

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.137[a]	.019	.003	.48866

a. Predictors: (Constant), Q23_price_high, NA bev alternatives are high priced

ANOVA[a]

Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	.580	2	.290	1.215	.300[b]
	Residual	30.565	128	.239		
	Total	31.145	130			

a. Dependent Variable: Q14 and Q16 combined

b. Predictors: (Constant), Q23_price_high, NA bev alternatives are high priced

Coefficients[a]

Model		Unstandardized Coefficients		Standardized Coefficients		
		B	Std. Error	Beta	t	Sig.
1	(Constant)	.096	.194		.493	.623
	NA bev alternatives are high priced	.075	.049	.134	1.528	.129
	Q23_price_high	.046	.098	.041	.468	.641

a. Dependent Variable: Q14 and Q16 combined

These findings do not support H5, and therefore the null hypothesis is not rejected.

4.3.7 H6: Preference for single-serve or ready-to-drink packaging will be positively associated with non-alcoholic beverage adoption.

A multiple linear regression was conducted to examine the relationship between packaging and format preferences (measured by three items: preference for convenience, portion control, and packaging format such as single-serve or ready-to-drink as independent variables) and consumption of non-alcoholic alternatives (combined measure from Q14 and Q16 as the dependent variable). The model summary shows a multiple correlation coefficient (R) of .076, with an R^2 of .006 (adjusted $R^2 = -.018$), indicating that approximately 0.6% of the variance in non-alcoholic alternative consumption is explained by the packaging and format preference predictors combined. The negative adjusted R^2 suggests the model fits the data worse than a simple intercept-only model. The standard error of the estimate is .49377.

The overall model is not statistically significant ($F(3, 127) = .248$, $p = .862$). Among the individual predictors:

- Preference for convenience showed a negative but non-significant association ($B = -.045$, $SE = .095$, $\beta = -.042$, $t = -.473$, $p = .637$).
- Preference for portion control showed a positive but non-significant association ($B = .115$, $SE = .180$, $\beta = .056$, $t = .636$, $p = .526$).
- Preference for packaging format (e.g., single-serve or ready-to-drink) showed a positive but non-significant association ($B = .049$, $SE = .140$, $\beta = .031$, $t = .351$, $p = .726$).

Table 11 presents the complete regression results for reference.

Table 11: H6 Linear Regression

Model Summary

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.076[a]	.006	-.018	.49377

a. Predictors: (Constant), Q27_packaging, Q26_portion, Q26_convenience

ANOVA[a]

Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	.182	3	.061	.248	.862[b]
	Residual	30.963	127	.244		
	Total	31.145	130			

a. Dependent Variable: Q14 and Q16 combined

b. Predictors: (Constant), Q27_packaging, Q26_portion, Q26_convenience

Coefficients[a]

Model		Unstandardized Coefficients B	Unstandardized Coefficients Std. Error	Standardized Coefficients Beta	t	Sig.
1	(Constant)	.390	.054		7.210	<.001
	Q26_convenience	-.045	.095	-.042	-.473	.637
	Q26_portion	.115	.180	.056	.636	.526
	Q27_packaging	.049	.140	.031	.351	.726

a. Dependent Variable: Q14 and Q16 combined

These findings do not support H6, and therefore the null hypothesis is not rejected.

5. Discussion

5.1 Re-evaluating the "Health" Driver: The Intention-Behavior Gap

The quantitative findings provide partial support for the claims that health and wellness are drivers of alcohol reduction behaviors in the context of the sober movement. The linear regressions performed reveal statistically significant and positive relationships between the importance placed on health and wellness and participants thought to reduce alcohol consumption (H1a: $\beta = .194$, $p = .025$, $R^2 = .038$), as well as actual consumption of NA alternatives (H1b: $\beta = .261$, $p = .004$, $R^2 = .068$). The results indicate that health and wellness can be associated with alcohol reduction and adoption of NA beverages. However, the low variance (less than 7% in both tests) is not fully reliable to solely predict health considerations.

These results emphasize a clear intention-behavior gap, particularly in relation to the Theory of Planned Behavior (Ajzen,1991), where positive attitudes toward healthier decisions do not always translate into actions. The results also contradict the literature reviewed where health and wellness are positioned as the primary catalysts for the sober movement. The WHO (2023) classified alcohol as a "Group 1 carcinogen" with no safe levels of consumption. The organizations link it to multiple cancers, cardiovascular disease, and numerous mental health issues, with messages intending to shift the public toward more mindful consumption habits. Other studies on TAACs, such as "Dry January", (Sober-Curious, 2024) and randomized trials providing NA alternatives (Yoshimoto et al., 2023) demonstrated reductions in daily alcohol intake and a sustained change in behavior for some participants. These changes are often tied to wellness benefits like improved sleep and mental clarity results.

Addition of the qualitative insights from industry experts help connect the research and quantitative data. Several experts described health and wellness as a driver of broader lifestyle trends, rather than a stand-alone trend (Interview 3 and Interview 8). One interviewee noted that consumers evaluate beverages through personal health, metal state, and longevity perspectives, but question overall quality and additives in NA products. This aligns with the small R^2 values, suggesting that consumers consider limiting their alcohol intake for health reasons, but not all NA alternatives are smart substitutions.

For the FMCG beverage industry, these findings imply that health-driven messaging alone is unlikely to drive widespread adoption of NA products. Brands should bridge the intention-behavior gap by emphasizing tangible, immediate benefits, (like better sleep, clean ingredients, and mental clarity) by integrating these into product innovation (e.g., functional ingredients like adaptogens) (Carlson, 2023). The results also highlight the need for targeted strategies among younger demographics, where health consciousness is high but competes with social barriers as well.

In summation, health and wellness intentions do contribute to NA adoption, but among collected responses, there is presence of an intention-behavior gap. This coincides with the idea that drivers of the sober movement are multifaceted.

5.2 Supply-Led Adoption: The Power of Retail Push

Among the hypotheses tested, H4 revealed partial support for awareness and visibility driving NA consumption. The multiple linear regression yielded a marginally non-significant overall model ($F(3, 127) = 2.437$, $p = .068$, $R^2 = .054$) but demonstrated a clear and statistically significant positive association between perceived increase in NA options in stores and NA consumption ($\beta = .239$, $p = .013$). On the contrary, perception of increased NA options in restaurants/bars ($\beta = -.157$, $p = .130$) and advertisements ($\beta = .030$, $p = .766$) were not significant. The results suggest that in-store visibility has a greater influence over NA adoption when compared to other channels.

This pattern also highlights how certain dynamics may be supply-led rather than purely demand-driven. While health and wellness can predict intention (H1a & H1b), consumption remains contingent on availability and presence in physical environments. The qualitative data from interviews corroborates this finding, since multiple experts emphasized the importance of retail space and performance-driven allocation. High-turnover SKUs create a high-pressure environment, where brands need a strong presence to stay visible (Interviews 2, 6, 8, 10). One interviewee noted, “Retailers support whatever sells. If lower-calorie or “clean label” products move faster, they get the prime displays” (Interview 10). Not only do beverage brands feel pressure from the competition, but retail spaces have a great deal of power, based on their consumer preferences. This finding aligns with broader industry observations that supermarkets and grocery retailers remain the primary purchase channel for NA products.

From a theoretical perspective, this resonates greatly with Resource-Based Theory (Barney, 1991; Barney et al., 2021), which poses that firms increase competition through rare, valuable, and hard-to-imitate resources and capabilities. Specifically, within the NA category, securing distribution (shelf space and shelf location, promotions, priority, etc.) is critical to success in the market. Larger brands with established relationships can leverage these resources, creating barriers to entry for smaller brands, reinforcing the push for creative and strategic strategies especially in the FMCG markets.

In addition, market data validates the importance of retail visibility, indicating that supermarkets and grocery retailers head the category of NA distribution especially regarding shelf space in this growing category (IWSR, 2025, January 8). Retailers' focus on high-visibility placements for NA products supports that in-store presence can outweigh advertising and alternative outlet availability when influencing consumption.

The insignificance of visibility and advertising in restaurants and bars highlights limitations in current push tactics, while on-premises channels support social normalization of NA consumption, these spaces appear less critical than everyday environments. For FMCG brands, prioritizing strategies relating to retail placement (in-store promotions, eye-level positioning, and partnerships), over mass advertising or smaller scale spaces is critical. Smaller brands need a clear market strategy with strong distribution support to compete.

In summation, the partial support of H4 positions retail visibility as a pivotal driver of NA adoption, complementing health relations and growth through push strategies. This emphasis on supply sets the stage for examining how evolving social norms reduce traditional barriers.

5.3 The Maturation of Social Norms: Beyond Destigmatization

The insignificant results for H2 and H3 show that social factors do not play a great role in shaping current beverage consumption patterns. Specifically, one's social pressure to drink showed no reliable association with alcohol consumption frequency (H2: $\beta = .091$, $p = .314$, $R^2 = .008$), and social acceptability of NA beverages did not predict NA consumption (H3: $\beta = .121$, $p = .167$, $R^2 = .015$). Thus, leading the findings to suggest that subjective norms hold minimal influence on beverage choices in this respondent group.

This result is contradictory to earlier discussions of TPB applications in consumption research, where subjective norms are noted as strong predictors, especially among young adults (Cooke et al., 2016). Other recent studies note a weakening of normative behavior over time, specifically considering moderation or abstinence (Howard et al., 2024). When considering the sober movement, the lack of significance in this area implies that traditional social pressures to drink (or stigmas against not drinking) are no longer major hurdles.

Insights from industry interviews reinforce this discussion. Many industry experts described moderation and not drinking as increasingly normalized and accepted, especially among younger generations, framing them as personal lifestyle choices rather than deviating from social expectations and pressures (Interviews 1, 4, 7). One interviewee discussed how moderation is becoming more socially acceptable, where NA options serve as a buffer for social rituals without carrying a stigma (Interview 4). This also connects with larger cultural trends, where additional research shows that youngers generations (particularly Gen Z and Millennials) see sobriety as aspirational or neutral, with 52% of these people expressing they would participate in sober-curious activities in 2025, driven by health, mindfulness, and social media normalization (Leger, 2025; NCSolutions, 2025). Social media platforms have increased awareness and reframed how consumers view alcohol-free living.

These results align with Consumer Culture Theory (Arnould & Thompson, 2005), which ties consumption to personal identity. Choosing NA options or limiting consumption has switched from an act of resistance against drinking norms to normalization of self-care, wellness, and intention. This growth explains why subjective pressures no longer predict behavior, and consumer independence and values have begun to guide decision making.

For the FMCG beverage industry, brands no longer need to face social resistance and stigmas through defensive messaging techniques. They can focus instead on celebrating moderation, and positioning products to reflect the lifestyles changes consumers are implementing in their day-to-day lives. Normalization helps limit the original barriers to entry for NA products and supports growth through everyday integration.

These insignificant findings for H2 and H3 emphasize maturation of social norms among consumers, where destigmatization has made subjective norms no longer a dominant driver of consumer choices. This cultural evolution compliments the supply-led effects and health influences, showing that modern consumers prioritize personal values over traditional social aspects.

5.4 Economic and Product Design Inelasticity

The results for H5 and H6 indicate that economic considerations and product design preferences do not have a strong influence on NA beverage adoption. When considering H5, the multiple regression examining price sensitivity showed no relationship results with NA consumption ($F(2, 128) = 1.215$, $p = .300$, $R^2 = .019$), with both individual predictors also showing insignificance ($\beta = .134$, $p = .129$ for NA pricing; $\beta = .041$, $p = .641$ for alcohol pricing). Additionally, H6 found no relations between preferences for convenience, portion control, or single-serve/ready-to-drink packaging and NA consumption ($F(3, 127) = .248$, $p = .862$, $R^2 = .006$), with all coefficients non-significant (β values ranging from $-.042$ to $.056$, $p > .50$).

The insignificant findings suggest that consumers do not switch or increase their NA adoption primarily to save money or due to packaging convenience. This contradicts the original literature details, where post-pandemic economic pressures drove customers to favor more affordable and convenient options (McKinsey, 2023; Kurl, 2023). Instead, the low values of R^2 indicate economic drivers are overshadowed by other factors like health and visibility.

Additionally, the qualitative findings from industry experts emphasize how non-alcoholic products maintain competitive pricing, despite the differences in production. It was emphasized that consumers are willing to pay premiums for quality, brand identity, and functional benefits (Interviews 9 and 10). One interviewee noted, "it's a lot more about the brand than the quality of the spirit and you pay for the brand, so spirits tend to be expensive, and non-alcoholic spirits are expensive to produce… I don't think price really matters for people" (Interview 9). This point emphasizes a broader trend towards premiumization in the beverage industry, where values come from authenticity, clean label ingredients, and experiential appeal over cost savings. Many premium brands, like the ones represented by Interview 9 and 10, are not experiencing an impact from this movement. Their position stands strong within the market, due to their continued dedication to offering high quality and consistent products. This emphasizes that consumers are willing to spend money, and maybe even splurge in the post-covid society today.

Aligning these results with Resource-Based Theory (Barney et al., 2021), highlights the competitive value from various capabilities (e.g. brand identity & equity, innovation, etc.) rather than cost leadership. The inelasticity suggests that consumers treat beverage choices as lifestyle enhancements or complements, not substitutes driven by economic or convenience decisions.

In summary, the insignificant results for H5 and H6 highlight economic and product design inelasticity as an important characteristic. Consumers are not switching to non-alcoholic options for relief or convenience, which reinforces the other concluded findings. These findings underscore the need to implement all-encompassing strategies that express experiential and identity-based details rather than economic levers.

6. Conclusion and Limitations

6.1 Conclusion

This study set out to examine how consumer attitudes and behaviors influence their purchase intention for low/no-alcohol beverages, through a triangulation of literature findings, 10 expert interviews and a survey of 134 respondents. These together helped develop findings across various drivers of the sober movement within the FMCG beverage industry.

The results revealed multiple factors that relate consumer intentions and predictors. While health and wellness attitudes were statistically significant predictors to reduce alcohol consumption and increase non-alcoholic consumption, the adequate variance gives a clear intention-behavior gap. Retail visibility can be seen as a strong driver when evaluating supply-led strategies. Conversely, social norms and economic/product design factors did not show influence, indicating that social pressures have minimized, while consumer preferences have shifted to prioritize taste, quality, and experience over cost and convenience.

Qualitative insights from industry professionals reinforced the patterns found in literature and quantitative data findings, helping portray the sober movement as an extension of mindfulness rather than abstinence. Consistent finding among interviewees includes the importance of retail performance, shelf allocation, premiumization, and coexistence within the current beverage market. Collectively these findings suggest that health and wellness contribute to the overall awareness and intentions of consumers, but to sustain future adoption, brands must adopt effective push strategies, selectively develop new products, and track cultural changes.

Brands within the FMCG beverage market have clear implications, and success in the low/no-alcohol category will be derived through purposeful innovation, strong retail relations, and intentional, integrative lifestyle marketing. The sober movement is not a representation of alcohol rejection, but an expansion of mindful, wellness-oriented beverage options in a fast-changing market. Future research could longitudinally explore behavior changes to further analyze and expand on the insights gathered.

6.2 Limitations

There are several limitations to acknowledge when looking at the findings in this study. First, the survey sample size and composition present an obvious limitation. While a sufficient number of responses (N=138) were recorded to conduct analysis, a larger number would have generalized the results. Majority of respondents were obtained through convenience sampling through personal networks and social media, which may present some areas of bias. The results may have skewed with respondents who are informed and more interested in trends, health, or overall lifestyle changes. Included in this limitation is the relevance of ages in the sample. Majority of respondents fell into the 18-34 age category, leaving a gap for insight into older generational perspectives. These findings provide valuable insight but should be referenced as indicative rather than representing the broader market.

Second, the study shows an imbalanced representation between the number of consumers who consume alcohol, and those who do not. A significantly larger proportion of respondents identified as alcohol consumers (92%), while fewer participants identified as low/no-alcohol consumers (8%). This imbalance limited the ability to conduct a more in-depth comparison. As a result, some hypotheses, specifically ones regarding non-alcoholic consumption motivations, were tested using combined variables rather than independent subsamples. This approach still resulted in meaningful analysis, but with reduced precision differentiating between identified consumer segments.

Third, the geographic distribution of respondents was heavily skewed. Majority of participants live in the United States, with only 22 respondents living outside of the U.S. This concentration may have varied results slightly, since geographic attitudes towards alcohol consumption can be contradicting. The findings emphasize a predominantly U.S. centric perspective on consumption and habits. While this focus is still valuable, given the size and influence of the U.S. beverage market, the results may not present generally to other international markets.

Finally, the data was collected at a single point in time, capturing present consumer attitudes and behaviors. The sober movement, and status of the beverage market are rapidly changing, so a longitudinal study would be better suited to assess how motivations, social norms, and purchase behaviors change over time.

Even with these limitations, the study shows valuable exploratory backing into the drivers of the sober movement and contributes to the expanding discussion around health, innovation and social norms in the beverage industry.

6.3 Future Research

To build on this study, a larger sample size would be ideal to intentionally represent and better capture the cross-cultural differences in alcohol reduction and non-alcoholic beverage adoption. Longitudinal research designs could also provide insight into whether the movement represents a sustained shift in behavior, or a temporary trend influenced by social, health or economic factors. Additional studies focused on non-alcoholic consumers or emerging hybrid consumers would better explain motivations within the segment. Finally, a broader range of qualitative resources would provide a stronger industry base. Representation from retailers, marketers, product developers, etc. would provide more insight into the adoption and impact of the movement.

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8. Appendices

Appendix A: Interview Outline and Structure

Discussion Topic	**Questions**
Interviewee Background and Experience	Can you tell me your age, position title, professional experience, and any other relevant details you want to include?
Industry Change, Consumer Trends, and Main Drivers	How have you seen consumer preferences around alcohol and wellness change over the past few years?
	What are the forces driving this movement?
	Do you see a demand for low/no-alcohol products?
Enablers and Market Conditions	What has made it easier for consumers to adopt these changes?
	How have you seen brands, retailers, or hospitality spaces contributed to enabling this shift?
Perception of the Sober Movement	How would you define or describe the "sober movement"?
	Do you see this movement as secular or cyclical?
	Which demographics or consumer groups seem most engaged with this movement?
Barriers and Impediments	What barriers or resistance exist that slow the adoption/production of non-alcoholic or low-alcohol products? (Consumers, Beverage Companies, Retailers/Distributors)
	What are the challenges with perception, pricing, distribution, or consumer identity that act as barriers?
	What barriers are present or will be for both small companies and large brands?
Business and Adaptation Strategy	How has your organization or sector responded to these shifts in consumer behavior?
	Have you introduced or sourced any new product lines or partnerships as a result? If no, are you thinking about this?
	Have you seen strategic changes in development, messaging, etc across the market? Locally and nationally?
	Has your marketing strategy changed?
Management Theory	From your perspective, is the sober movement something your organization sees as externally driven or more of an internally recognized opportunity?
	What resources or capabilities do firms need to deploy to respond to this market shift?
	How has your organization reconsidered its value proposition in response to changing consumer expectations around consumption?
	Have you noticed any shifts in brand storytelling or consumer messaging over the past few years?
	How does your company… ▪ keep track of trends/shifts/preferences ▪ recognize changes and implement actions ▪ reconfigure strategies, reorganize teams, adjust processes, etc.
	How do you see competition evolving between traditional alcohol brands, alcohol alternative brands, and non-alcoholic brands?
Future Outlook	If this movement is secular or cyclical, how must brands, distributors, and retailers adjust their positioning and processes?
	What factors will shape the future of this movement? What factors will shape the future of overall beverage consumption?

Personal Reflections	What advice would you give to brands trying to remain relevant in this changing market?

Table 12: Interview Outline and Structure

Appendix B: Interviewee Overview

Interviewee ID	**Interviewee Role/Position**	**Interviewee Experience/Qualifications**
Expert 1	Founder and Owner of an independent craft spirits brand in the U.S. market.	Entrepreneur with brand development, product formulation, and strategy experience in the spirits industry.
Expert 2	Senior Purchasing Manager - Premium Hospitality	18+ years in food & beverage operations, culinary management, and purchasing; extensive experience with vendor negotiations, banquet operations, and cost control.
Expert 3	Vice President at a regional beverage wholesaler in the Northeastern United States	25+ years of experience across the military, pharmaceuticals, and beverage distribution; currently transitioning into minority ownership of the distributorship.
Expert 4	Non-Alcoholic Beverage Portfolio Manager at a Large Beverage Distributor	20+ years in beverage, alcohol, and retail experience
Expert 5	Wine industry professional (importing/distribution; senior-level experience)	20+ years in beverage, alcohol, and retail experience, European and U.S. wine market expertise, fine wine importing
Expert 6	Director of Marketing at a craft brewery and distillery	35+ years of experience in beverage distribution, beverage sales, management, and marketing.
Expert 7	Management consultant at a global strategy firm with prior experience as a startup co-founder in the wine and beverage space.	Master's degree; professional background spanning consulting, venture-backed startups, and fine wine investment platforms. Based in Europe, with experience in both U.S. and European beverage markets.
Expert 8	Category Development Manager at a major European non-alcoholic beverage (NAB) company	Master's degree in Brand and Media Management; works at the intersection of sales, marketing, shopper activation, and innovation
Expert 9	CEO Luxury Wine Group (U.S. operations)	25+ years in the wine industry in France and the United States, premium and luxury wine distribution, strategy and leadership
Expert 10	Director of Sales - regional craft beverage producer	20+ years of experience including long tenure with a major beer wholesaler and leadership at regional producer

Table 13: Interviewee Overview

Appendix C: Interview Summaries

Interview 1

The participant described the sober and "mindful drinking" movement as a gradual but structural shift rather than a passing trend, emphasizing that consumer motivations are increasingly tied to health, moderation, and lifestyle alignment rather than abstinence alone. They noted that while traditional alcohol consumption remains culturally embedded, there is a growing normalization of reduced intake and substitution, particularly among consumers who still value social rituals but want more control. From their perspective, the rise of non-alcoholic and low-alcohol options reflects broader consumer behavior patterns seen across food and beverage categories, including transparency, wellness, and functional benefits.

In terms of market enablers, the participant highlighted improved product quality, greater retail visibility, and cultural reframing of sobriety as key drivers accelerating adoption. They emphasized that early non-alcoholic products struggled with taste credibility, which limited repeat purchase; however, recent innovation has significantly narrowed the experiential gap between alcoholic and non-alcoholic offerings. At the same time, the interviewee acknowledged persistent barriers, including pricing skepticism, lingering social stigma in certain settings, and confusion among consumers about when and how non-alcoholic products "fit" into their routines.

From a business and strategic perspective, the participant framed adaptation to the sober movement as less about abandoning alcohol altogether and more about portfolio diversification and brand flexibility. They emphasized the importance of meeting consumers "where they are," suggesting that brands that ignore moderation trends risk losing relevance. Drawing implicitly on principles aligned with consumer culture theory, the participant described how identity, ritual, and meaning remain central to drinking behavior, regardless of alcohol content. Looking forward, they expressed cautious optimism, noting that while growth may be uneven, the long-term trajectory favors brands that embrace moderation, inclusivity, and evolving definitions of social drinking.

Key Insights: The sober movement is viewed as a behavioral re-framing, not a rejection of alcohol culture. Consumers seek more control, balance, and intention when making purchase decisions. Moderation is becoming more socially acceptable, rather than defensive or stigmatized. Health and ingredients are an increasing priority for consumers.

Notable Quotes:

"People aren't necessarily quitting drinking; they're just being more thoughtful about when and why they drink."

"If it costs almost the same as alcohol, people want to understand what they're paying for."

"This isn't about telling people what not to do, it's about giving them better options."

"I think when, if, and when people realize what was actually in their alcohol, they would never touch it."

"People just know more. And information to find out about their products is at their fingertips, literally in a second."

"Until the consumer is really demanding more and more non-alcoholic products, the stores are just going to have to take from one category and move it to the other."

"People are always going to have a vice; it's just a matter of what it is at the time."

Interview 2

The interviewee is a Senior Purchasing Manager at a premium hotel in a major city, with nearly two decades of experience across restaurant management, culinary operations, and large-scale hospitality procurement. From his perspective, the sober and sober-curious movement is no longer anecdotal or niche, but a measurable business reality. He reported a 15% year-over-year decline in alcohol sales, with banquet alcohol revenue alone down approximately 7%, representing "hundreds of thousands of dollars" in lost revenue. This decline has prompted operational shifts, including expanded non-alcoholic beer offerings, development of structured mocktail menus, and growing attention from vendors actively promoting alcohol-free alternatives.

The interviewee emphasized that cost, health, and availability are the primary drivers shaping both consumer behavior and client purchasing decisions within the hotel context. While personal health motivations influenced his own decision to stop drinking, he noted that most institutional clients are driven less by wellness ideology and more by budget optimization, particularly in banquet and conference settings. The increased acceptability and visibility of non-alcoholic beverages, especially when they visually resemble alcoholic options, has lowered social barriers and facilitated adoption. He described the shift as "definitely a real thing" and "not just a trend," stressing that both vendors and hospitality operators are now reacting strategically rather than dismissively.

From a firm-level perspective, adaptation remains constrained by brand standards, physical storage limitations, menu space, and pricing thresholds. While the hotel has been proactive in introducing non-alcoholic options, larger structural changes depend on corporate-level mandates and supplier ecosystems. He framed the movement as a long-term, secular shift, driven by rising prices, improved product quality, and evolving social norms, predicting continued growth over the next five years. Importantly, he viewed non-alcoholic innovation as a necessary revenue-replacement strategy rather than a threat to traditional alcohol categories.

Key Insights: Alcohol sales declines are visible and material. Health, cost savings, and post-COVID implications are core consumption drivers. This is a long-term movement, where adaptation from a business point is necessary to progress. Increased non-alcoholic menu options are vital for sustaining future business and generations. Corporate standards can greatly limit flexibility and strategy. Physical storage and space constraints are a large barrier. Vendor response indicates an internal recognition of the category urgency.

Notable Quotes:

"It's definitely a real thing. It's not just a trend."

"We are down… about 15% in alcohol sales."

"We've pivoted by offering more non-alcoholic options."

"Beer is the number one thing that a lot of people gravitate to from a non-alcoholic standpoint."

"It's usually the hottest vodka, whatever the flavor is, or the newest gin or tequila. But lately, it's been like, hey, have you tried this water or other drink?"

"As soon as you pour the non-alcoholic beer into a glass, you can't tell the difference."

"Alcohol is probably where companies are going to cut costs, because alcohol just adds up."

"If you're not offering a mocktail section on your menu, you're missing out."

"I don't think this movement is going to go anywhere for at least the next five years."

Interview 3

This interview provides a distributor-level perspective on how the sober movement and broader wellness trends are reshaping the alcohol and FMCG beverage landscape. The respondent emphasized that the alcohol industry, particularly beer, has experienced unprecedented disruption after decades of relative stability. He described declining traditional beer volumes alongside rapid growth in low-calorie, low-alcohol, and non-alcoholic products, framing this shift as part of a larger cultural movement centered on health, productivity, moderation, and longevity rather than abstinence alone.

The respondent identified multiple converging drivers of this change, including increased health and fitness consciousness, generational differences in attitudes toward alcohol, the rise of GLP-1 weight-loss medications, and the normalization of marijuana and functional alternatives. He stressed that younger consumers are not necessarily consuming less overall but are substituting alcohol with other products perceived as less harmful or more compatible with active lifestyles. From a business standpoint, he explained how wholesalers are responding by repositioning themselves as "total beverage" companies, expanding portfolios beyond beer, investing in data analytics, cold storage, new logistics systems, and retraining sales teams to sell wellness-oriented and non-alcoholic products.

The respondent was clear that the sober movement is not a temporary trend but a structural shift in consumer behavior. He described non-alcoholic beverages as increasingly normalized in retail and on-premises environments, with improved quality, greater shelf space, and higher profitability in some cases. While acknowledging challenges such as limited cold space and increased SKU complexity, he framed adaptation as essential for survival. Overall, the interview strongly supports the idea that the sober movement represents a consumer-led redefinition of social drinking, forcing firms across the beverage value chain to reconfigure resources, capabilities, and strategies to remain competitive.

Key Insights: The alcohol industry, especially beer, is facing structural disruption after decades of stability. The sober movement is driven by health, fitness, productivity, longevity, and moderation, not total abstinence. Wholesalers are transitioning into "total beverage" companies, expanding beyond alcohol. Firms must invest in new logistics systems, data analytics, sales training, and portfolio diversification. The movement is consumer-led, accelerated by social media, information access, and cultural normalization.

Notable Quotes:

"It's really been disruptive to an alcohol industry, a beer industry that was unchanged and unfazed for generations."

"I don't even know if it's just a sober movement… I think there's a fitness movement. I think there's a productivity movement."

"Younger consumers don't necessarily see marijuana as worse than alcohol; they actually see it as healthier."

"We're no longer just a beer wholesaler; we're a total beverage wholesaler."

"If you don't have non-alcoholic options, people will go somewhere else that does."

"The sober movement is real. I would describe it as people prioritizing how they feel, how they look, and how they think."

"Every major beer brand has come out with a non-alcoholic option in the last few years. That tells you something."

"This isn't about abstinence. It's about flexibility and options."

Interview 4

The interviewee described the sober and non-alcoholic movement as a structural shift in the beverage industry, accelerated by the COVID-19 pandemic and the legalization and normalization of cannabis consumption. Drawing on over two decades of experience in beverage alcohol, he emphasized that the decline in alcohol consumption was first noticed during and immediately after the pandemic, when accessibility to alcohol increased sharply through delivery services, followed by widespread consumer fatigue. As he explained, many consumers became “tired of drinking,” prompting a reevaluation of alcohol’s role in daily and social life

From an industry perspective, he positioned non-alcoholic beverages not as a replacement for alcohol, but as a buffer or complement within consumer routines. He noted that the majority of consumers who purchase non-alcoholic beverages still consume alcohol occasionally, reframing the movement as one of moderation rather than abstinence. This reframing has helped reduce stigma, particularly in social settings where appearance, participation, and social inclusion remain important drivers of consumption behavior

The interviewee also highlighted significant organizational adaptation within distribution and sales structures. His role, focused exclusively on non-alcoholic portfolios, did not exist five to six years ago, underscoring how firms have reallocated resources in response to shifting demand. He described how sales teams initially resisted acknowledging the category’s growth but gradually adopted it as data, consumer pull, and revenue opportunities became undeniable. He characterized the movement as secular rather than cyclical, predicting continued growth with eventual stabilization rather than decline

Key Insights: The sober movement is primarily consumer-driven, not industry-initiated. COVID-19 created both a surge in alcohol consumption and subsequent burnout. Cannabis legalization has acted as a major substitute and catalyst. Improved taste and quality of non-alcoholic products reduced adoption barriers. Restaurants and bars benefit financially by pricing NA drinks similarly to Firms created dedicated non-alcoholic roles and programming. The movement will continue to grow but plateau while, alcohol, cannabis, and non-alcoholic beverages will coexist. Non-alcoholic consumption will remain normalized rather than exceptional.

Notable Quotes:

“The sober movement isn’t really 100% the sober movement, it’s more along the lines of what you’re choosing to consume… Are you choosing to drink or are you choosing to consume cannabis?”

“…if you think about it, none of the big liquor companies came out with non-alc. It was all startup, and it was, as of the last five or six years, a lot of these guys have been starting up, again, cooking the idea in COVID, but that makes me think it's not industry driven. But since it's been so successful, now we're starting to see some of the big spirit companies have their own knockoff.”

“The quality is so good now that you can’t tell the difference.”

“This didn’t exist five or six years ago, my role didn’t exist.”

“It’s not going to push liquor completely out… everybody’s going to be able to play in the sand.”

“I don’t feel like the movement is a sobriety movement, I feel it’s a buffer.”

Interview 5

This interview offered a wine-industry–specific and culturally grounded perspective on the sober movement, positioning the trend not as a rejection of alcohol, but as a structural, cultural, and informational disruption to traditional wine consumption. Unlike interviewees operating primarily in beer, spirits, or non-alcoholic categories, this participant framed the movement as an existential challenge to wine’s shelf space, cultural legitimacy, and economic sustainability, especially for producers operating on thin margins.

The interviewee emphasizes that declining alcohol consumption is not new in Europe and notes that wine consumption per capita in historically high-consumption countries has already fallen dramatically over decades. However, what distinguishes the current moment is the speed of change, the influence of social media, and the competition for physical retail space, particularly from cannabis beverages and functional non-alcoholic products. The respondent highlights that non-alcoholic beverages are not simply substituting alcohol, but restructuring retail real estate, forcing wine to compete with entirely new product categories.

Importantly, this interview introduces a critical counter-narrative to dominant wellness messaging. While acknowledging health concerns around excessive alcohol consumption, the participant argues that wine has been culturally reframed through fear-based and often oversimplified narratives online. From this perspective, the sober movement is partly enabled by information asymmetry, weak consumer education, and the wine industry’s historical failure to communicate nuance, moderation, and cultural context effectively.

Key Insights: Reduced shelf space intensifies internal competition within wine categories. Declining volume creates a “zero-sum” environment where survival often comes at another brand’s expense. Social media influence and misinformation accelerate behavioral change. Consumers increasingly trust influencers over industry expertise. U.S. drinking norms developed differently, emphasizing volume and social signaling. The wine industry experiences barriers through weak education infrastructure, and intimidating culture. U.S. drinking norms developed differently, emphasizing volume and social signaling.
Notable Quotes:
“Wine does not run on alcohol. It runs on people.”
“The industry should do a much better job in creating an education platform with facts, not just through social media.”

“I grew up in a culture where a glass of wine is mandatory. I couldn’t conceive having a good meal and not having wine… Wine was part of nutrition. It wasn’t indulgence, it was just part of life.”

“Less production doesn’t always mean higher value. Sometimes it means a company just can’t survive anymore.”

"This time it affects the whole industry, not just one country or one generation."

"Cannabis and non-wine beverages have had a significant impact on the wine industry… It's not just sober versus alcohol—it's everything else people can choose instead."

Interview 6

This interviewee provided responses reflecting on long-term shifts in the beer and beverage industry, particularly following the COVID-19 pandemic. They emphasized that while beer sales peaked in 2020 due to lockdowns and increased at-home consumption, the post-pandemic period has been marked by consistent year-over-year declines. According to the interviewee, this downturn coincides with rising health consciousness among younger generations and a growing preference for moderation, alternative activities, and non-alcoholic beverage options.

A key theme throughout the responses is the rapid expansion of the non-alcoholic beer category. The interviewee identified non-alcoholic beer as the fastest-growing segment within beer, driven by improved availability, increased product quality, and broader consumer acceptance. They also highlighted behavioral changes in social and event contexts, noting that alcohol consumption at events has become more calculated and intentional, with consumers either drinking less, choosing non-alcoholic options, or replacing alcohol consumption with recreational marijuana or alternative leisure activities.

From a business perspective, the interviewee acknowledged that while large firms may be better positioned to absorb the costs associated with entering the non-alcoholic space, smaller companies face significant barriers related to investment, shelf space, and margin pressure. Although their own facilities has not yet fully entered the non-alcoholic segment, they recognized the category as an internally acknowledged opportunity across the beverage industry. Strategic adaptation, in their view, will require new forms of advertising, increased sampling, and broader availability across retail channels, while remaining cost-effective and responsive to evolving consumer demand.

Key Insights: Alcohol consumption spiked during COVID but has declined consistently since, suggesting a structural rather than temporary shift. Younger generations are significantly more health-conscious than previous groups, influencing reduced alcohol intake. Non-alcoholic beer is currently the fastest-growing segment in beer, supported by increased availability and improved taste. Non-alcoholic beer is currently the fastest-growing segment in beer, supported by increased availability and improved taste. Large firms can absorb the costs of innovation more easily, while smaller firms face space, cost, and risk constraints.
Notable Quotes:
"In 2020 beer sales were the highest they had been for a five-year period. Covid had people grounded and consumption had increased. Since then sales have been down every year."

"The younger generations are much more health conscious than the previous ones."

"The fastest growing beer products currently are N/A beer."

“Years ago draft beer was more popular for events because of the volume being consumed and prices. That has changed drastically where the amount is more calculated when having and event or function.”

“People are either finding other activities instead of going to bars or are using recreational marijuna. They are finding they sleep better, have positive attitudes and have more energy.”

Interview 7

This interview offered a strategic and macroeconomic perspective on the sober movement, positioning it less as a universal cultural shift and more as a U.S.-centric, Gen Z–driven phenomenon with uneven relevance across beverage categories. The interviewee emphasizes that declining alcohol consumption is not new; rather, it reflects a long-term shift from quantity to quality, particularly in mature markets. In his view, the sober movement exists along a spectrum, from full abstinence to situational drinking and substitution with non-alcoholic, adaptogen, or THC-infused beverages, rather than a binary rejection of alcohol.

A key theme throughout the interview is the distinction between cultural drivers and economic drivers. While the sober movement may influence mass-market FMCG beverages, the interviewee argues that recent declines in premium and fine wine markets are far more attributable to macroeconomic forces, particularly post-COVID monetary tightening, reduced disposable income, and global uncertainty. He notes that during periods of economic contraction, discretionary and collectible categories, such as fine wine, experience volatility regardless of social movements.

From a strategic standpoint, the interviewee highlights brand adaptation and marketing evolution as central to navigating current market conditions. He argues that traditional mass digital advertising has lost credibility with educated post-digital consumers. Instead, he advocates for experiential, in-person, and emotionally resonant brand engagement, particularly for premium and heritage brands. Established firms should focus on deepening relationships with their most valuable consumers, while emerging brands must accept higher upfront investment to build awareness and legitimacy. Overall, the interview frames the sober movement as one factor among many shaping the beverage landscape, interacting with generational change, economic cycles, and evolving consumer expectations.

Key Insights: Declining alcohol consumption reflects a long-term quality-over-quantity shift, not a sudden behavioral rupture. Economic conditions, along with sobriety trends, are identified as primary driver behind recent downturns in premium beverage categories. Consumers increasingly seek control, discipline, and mental clarity, especially among senior professionals. Established brands should focus on their top-value customers, while new brands must adopt a venture-style growth mindset. The beverage industry is hyper-fragmented, making differentiation and emotional connection critical to long-term success

Notable Quotes:

“To my understanding, the sober movement is something very driven by the Gen Z idea of reconsidering life versus what the millennials’ parents have been doing.”
“What we have been observing in general over the past decade or so is an overall decrease in the per capita consumption of alcohol.”
“What we have been observing in general over the past decade or so is an overall decrease in the per capita consumption of alcohol.”

“There are the people who, you know, they completely cut out alcohol. And then I think there's this in between where there's some people who are choosing not to drink as much as they used to.”

“There are several senior leaders that I know in my company and client's company that do not drink or have stopped drinking once they took very senior positions, because they don't want to ever sacrifice mental clarity.”

Interview 8

This interview highlights the sober movement as part of a broader, secular cultural shift toward health-oriented and functional consumption rather than a narrow rejection of alcohol alone. From the interviewee’s perspective, declining alcohol consumption is embedded within a wider reassessment of sugar intake, additives, calories, and the functional value of beverages. Younger consumers, particularly Gen Z and Millennials, are driving this change by questioning not only alcohol use but overall beverage quality and contribution to everyday wellness. The interviewee emphasizes that consumers increasingly expect beverages to “deliver something extra,” such as hydration, energy, or performance benefits, rather than serving purely hedonic purposes.

From a market-enabler standpoint, the interview underscores how improved product quality, increased retail assortment, and clearer on-pack communication have lowered adoption barriers for non-alcoholic alternatives. Retailers are expanding shelf space for functional and health-driven categories, while brands are making benefits like “zero sugar” or added vitamins more visible. At the same time, social media plays a key role in normalizing alcohol reduction and amplifying health-focused lifestyles, accelerating diffusion among younger demographics.

However, the interview also reveals significant structural barriers, particularly for large firms. Innovation cycles at scale are long (often three to four years) due to R&D complexity, factory constraints, and regulatory oversight. While large firms benefit from established retailer relationships, they face internal resistance, portfolio trade-offs, and margin pressures when shifting away from legacy high-margin products. Smaller brands can innovate faster but struggle with distribution access. Overall, the interview reinforces that success in this evolving market requires openness to consumer-driven change, strong data capabilities, and an ability to reframe beverages around occasions and benefits, rather than alcohol presence or traditional categories.

Key Insights: The sober movement is part of a long-term cultural shift, not a cyclical trend. Health, sugar reduction, and functional benefits are primary motivators, not abstinence alone. Gen Z and Millennials are the strongest drivers due to social media exposure and fitness culture. Enablers are the improved quality and taste of non-alcoholic beverages, clear communication, and increased assortment and visibility. Existing barriers include consumer skepticism, social pressure around consumption, high R&D and innovation costs, and retail space. Brands should shift from sugary products to offering low calorie, zero-sugar, and functional offerings.

Notable Quotes:
"I think it is secular. It's like a whole cultural shift towards mindful living and healthy consumption."
"People are not only reducing alcohol, they are questioning sugar, additives, calories, and what a beverage actually gives them."
"If it doesn't taste well, no one will buy it, even if it's super healthy."
"Retailers prioritize high-turnover SKUs. If you don't perform, you're out."
"Consumers are determining what we consume now. If companies don't deliver what people want, they won't buy it."
"It's more important not to brand a product as 'no alcohol,' but to focus on the health benefits."

Interview 9

This interview provides a skeptical and critical industry perspective on the sober movement, particularly challenging the assumption that non-alcoholic alternatives inherently align with health and sustainability values. The interviewee situates the sober movement within a long historical cycle of shifting health narratives, noting that alcohol messaging has swung dramatically over decades, from being promoted as beneficial to being framed as categorically harmful, often driven by conflicting scientific studies and media influence.

Rather than viewing the sober movement as a unified consumer-led phenomenon, the interviewee emphasizes external forces shaping the narrative, including lobbying pressures from adjacent industries (notably cannabis), pharmaceutical influences (e.g., weight-loss drugs), and sensationalized health communication. From this perspective, reduced alcohol consumption is real, but not necessarily driven by enthusiasm for non-alcoholic substitutes, especially in premium wine categories where authenticity, quality, and sustainability remain core values.

Strategically, the firm does not pursue low- or no-alcohol innovation, viewing alcohol removal as incompatible with its biodynamic philosophy and environmental commitments. Instead, the company responds through premiumization, sustainability leadership, and allocation models, aligning with a broader "drink less but better" trend. The interview reinforces that while non-alcoholic beverages are gaining shelf space, their overall market share remains small, and long-term success will depend on whether they can resolve contradictions around health, additives, cost, and environmental impact.

Key Insights: The sober movement is influenced by external industries (e.g., cannabis, pharmaceuticals), not purely consumer demand. Cultural shifts toward responsibility and moderation are real, but abstinence is not universal. Many NA products require heavy processing, added sugar, and high energy use, undermining sustainability claims. Strategy centers on values reinforcement, not product substitution. Premium brands are insulated from volume declines through scarcity, allocation, and quality positioning. Alcohol, cannabis, and NA beverages are likely to coexist, not replace one another. Technological and societal changes (e.g., autonomous vehicles) may reduce traditional barriers to alcohol consumption.

Notable Quotes:
"You can find medical studies that say one glass of red wine is good for your heart, and other studies that say no level of alcohol is safe. The results are very rarely consistent."
"There is a lot of lobbying against alcohol, especially with the evolution of the cannabis business."
"A lot of these non-alcoholic spirits have a lot of sugar, which is not necessarily better for your health."
"Non-alcoholic wine is actually very unsustainable because you have to manipulate the natural wine a lot, and that requires more energy."
"For us, it's all about quality. If you produce something of high quality, you will always find people interested in the know-how and the authenticity."
"The real trend is drinking less but drinking better."
"You're starting to have companies that are developing non-alcoholic sparkling wine with traditional methods, so it's very complicated to do, it's very expensive to produce if you want to do it with a high quality."

"It's a lot more about the brand than the quality of the spirit, and you pay for the brand, so spirits tend to be expensive, and non-alcoholic spirits are expensive to produce, so at the end of the day, I don't think price really matters for people that consume non-alcoholic."

Interview 10

The interviewee is a seasoned beverage industry professional with over 20 years of experience across the three-tier system, including long tenure with a major beer wholesaler and current leadership as a Director of Sales at a regional craft beverage producer. Their perspective emphasizes how shifts in consumer wellness priorities are filtering unevenly through the market, influencing product innovation, retailer behavior, and on-premise offerings rather than signaling a wholesale rejection of alcohol.

From their perspective, the sober movement is best understood as an extension of mindful drinking and wellness trends, rather than a complete behavioral break. They identify hard seltzer as an early inflection point, framing it as the first mainstream "better-for-you" alcohol category that normalized moderation, lower calories, and transparency. More recently, they observe growing demand for lower-ABV beverages, particularly in on-premise settings where consumers want to extend social occasions without overconsumption.

However, the interviewee remains cautious about the scale and sustainability of the non-alcoholic segment. While acknowledging its growth, they emphasize that NA products remain capital-intensive, operationally complex, and distribution-dependent, favoring large players with scale. Smaller brands must weigh innovation against cost, shelf space, and distributor support, reinforcing the idea that the sober movement creates strategic trade-offs rather than universal opportunity. As a small brand, the interviewee highlighted their focus to look at trends from consumers and distributors when looking into expansion. Smaller brands must have a more clear go-to-market plan.

Key Insights: Wellness has become a central decision factor in alcohol consumption. Hard seltzer marked the first major normalization of "better-for-you" alcohol. On-premise demand is shifting toward lower-ABV options rather than full abstinence. Retailers are performance-driven, allocating space to products that move quickly. Ingredient transparency and clean-label messaging support moderation trends. NA beverages face high production costs and equipment barriers. NA pricing often matches alcohol, creating consumer resistance.

Notable Quotes:
"As a smaller brand, every new SKU must have a clear go-to-market plan."
"Brands will need to stay flexible, track trends closely, and communicate clearly with consumers about ingredients." and ABV.

"Younger demographics will continue shaping where the market goes—toward balance and mindful drinking."

"Innovate with purpose, understand your consumer, and make sure every product has a strong strategy behind it."

"Retailers support whatever sells. If lower-calorie or "clean label" products move faster, they get the prime displays."

Appendix D: Survey Questions

Question No.	Question	Question Type	Answer Options
Qualifying Questions			
1	Which of the following describes your alcohol consumption right now?	Multiple Choice	I drink alcohol regularly, I drink alcohol occasionally, I rarely drink alcohol, I do not drink alcohol
2	In the past 6 months have you consumed alcohol?	Multiple Choice	Yes, No
Non-Alcohol Block			

15	How long has it been since you consumed an alcoholic beverage?	Multiple Choice	6 Months, 1 year, 1 ½ years, 2 years, More than 2 years, I have never consumed alcohol
16	In the past 6 months have you consumed a non-alcoholic beverage alternative (mocktail, NA beer, NA wine, functional beverage, etc.)?	Multiple Choice	Yes, No, Not sure
17	How often do you consume non-alcoholic beverages (mocktail, NA beer, NA wine, functional beverage, etc.)?	Multiple Choice	Daily, Several times per week, Once a week, A few times per month, Rarely, Never
18	In what situations do you usually drink alcohol alternatives? (select all that apply)	Multiple Selections	At home relaxing, At restaurants or bars. Social gatherings or special events (parties, holidays, weddings), Work-related events, Vacations trips or travel, Sporting events or recreational activities, Other
19	On a typical occasion when you drink alcohol alternatives, how many standard drinks do you usually consume? Standard Drink = 12oz can, 5 oz wine pour, 1.5oz spirit alternative	Multiple Choice	1-3 Drinks, 4-6 drinks, 7-9 drinks, 10 or more drinks
20	What are your primary reasons to avoid alcohol? (select up to 3)	Multiple Selections	Health and wellness, Weight management, Mental clarity, Better sleep, Cost savings, Avoiding hangovers, To focus on productivity, Influence of friends or social media, Concerns about ingredients / additives, Other
Alcohol Block			
5	How often do you consume alcohol?	Multiple Choice	Daily, Several times per week, Once a week, A few times per month, Rarely, Never
6	Over the past 2 years has your alcohol consumption...	Multiple Choice	Increased, Decreased, Stayed the same
7	In what situations do you usually drink	Multiple Selections	At home relaxing , At restaurants or bars, Social gatherings (parties,

	alcohol? (select all that apply)		holidays, weddings), Work-related events, Vacations or travel, Sporting events or recreational activities
8	On a typical occasion when you drink alcohol, how many standard drinks do you usually consume? Standard Drink = 12 oz beer, 5 oz wine, or 1.5 oz liquor	Multiple Choice	1-2 drinks, 3-4 drinks, 5-6 drinks, 7 or more drinks
9	What motivates you to drink alcohol? (select up to 3)	Multiple Selections	Taste and enjoyment, Socialization and fitting in, Stress reduction, Habit or routine, Celebration or special occasions, Relaxation, Cultural norms, I do not drink alcohol, Other
12	Have you ever thought about reducing your alcohol consumption?	Multiple Choice	Yes, No, Not sure
10	Have you actively tried to reduce your alcohol consumption at any point in the past 2 years?	Multiple Choice	Yes, No, Not sure
11	What are the primary reasons you would reduce or avoid alcohol? (select up to 3)	Multiple Selections	Health and wellness, Weight management, Mental clarity, Better sleep, Cost savings, Avoiding hangovers, To focus on productivity, Influence of friends or social media, Concerns about ingredients / additives
14	In the past 6 months, have you consumed non-alcoholic alternatives (mocktail, NA beer, NA wine, functional beverage, etc.)?	Multiple Choice	Yes, No, Not sure
Social Norms Block			
21	Please indicate how much you agree or disagree with the following statements:		
	I feel pressure to drink alcohol in social situations	5 point Likert Scale	Strongly disagree – Strongly agree
	I worry not drinking alcohol will make me stand out		

	My friends influence my consumption choices		
	I feel more accepted when I drink alcohol		
	I feel comfortable declining alcohol in social settings		
22	Please rate how important each of the following reasons is for choosing non-alcoholic options:		
	I feel pressure to drink alcohol in social situations	5 point Likert Scale	Not at all important – Extremely important
	I worry not drinking alcohol will make me stand out		
	My friends influence my consumption choices		
	I feel more accepted when I drink alcohol		
	I feel comfortable declining alcohol in social settings		
23	In which situations are you most likely to choose non-alcoholic options? (select all that apply)	Multiple Selections	When socializing, When driving, At work events, At home, When prices of alcohol feel too high, When trying to limit calories or sugar, When alternatives taste appealing, Other
FMCG Insight			
24	What beverage formats do you purchase most often? (select all that apply)	Multiple Selections	Single cans, Multi-pack cans (e.g., 4-pack, 6-pack, 12-pack), Single glass bottles, Multi-pack glass bottles, Large bottles (e.g., 750 ml spirits, wine), Boxed formats (e.g., boxed wine, multi-serve carton), Ready-to-drink canned cocktails or mixed drinks
26	When choosing between beverage formats and packaging, what matters most? (Select up to 3)	Multiple Selections	Convenience, Price, Portion control, Flavor variety, Sustainability / packaging, Brand familiarity, Alcohol percentage
25	Where do you usually buy alcoholic	Multiple Selections	Supermarkets / grocery stores, Convenience stores / gas stations,

<table>
<tr><td></td><td>beverages? (Select all that apply.)</td><td></td><td>Liquor or bottle shops, Warehouse / club stores (e.g., Costco, Sam's Club), Online delivery services, Direct from brands (e.g., brand website, taproom, tasting room), Bars or restaurants (to-go options), Other</td></tr>
<tr><td>35</td><td>Where do you usually buy non-alcoholic beverages and alternatives? (Select all that apply.)</td><td>Multiple Selections</td><td>Supermarkets / grocery stores, Convenience stores / gas stations, Liquor or bottle shops, Warehouse / club stores (e.g., Costco, Sam's Club), Online delivery services, Direct from brands (e.g., brand website, taproom, tasting room), Bars or restaurants (to-go options), Other</td></tr>
<tr><td>27</td><td>What factors influence your decision to purchase certain brands? (Select up to 3)</td><td>Multiple Selections</td><td>Price, Taste, Brand reputation, Ingredient quality, Health claims, Sugar/calorie content, Local/small-batch production, Packaging format (cans, bottles), Recommendations / social media, Availability</td></tr>
<tr><td rowspan="8">36</td><td colspan="3">Please indicate how much you agree or disagree with the following statements:</td></tr>
<tr><td>I notice more non-alcoholic beverage options in stores</td><td rowspan="7">5 point Likert Scale</td><td rowspan="7">Strongly disagree – Strongly agree</td></tr>
<tr><td>I notice more non-alcoholic options in restaurants and bars</td></tr>
<tr><td>I see more advertisements for non-alcoholic beverages than I used to</td></tr>
<tr><td>Non-alcoholic options are easier to find now than a few years ago</td></tr>
<tr><td>Non-alcoholic beverages are more socially acceptable</td></tr>
<tr><td>The quality of non-alcoholic beverages has improved in recent years</td></tr>
<tr><td>Non-alcoholic beverage alternatives are often priced higher than expected</td></tr>
</table>

Industry Perception			
28	Do you feel beverage companies are offering enough non-alcoholic options?	Multiple Choice	Yes, No, Not sure
29	How innovative do you think the beverage industry is in responding to consumer preferences?	5 point Likert Scale	Not innovative – Extremely innovative
30	Which type of brands do you prefer when purchasing alcohol-free beverages?	Multiple Choice	Established beverage brands, New alcohol-free or wellness-focused brands, Craft or local brands, Store-brand or private-label options, No preference
Demographics			
31	Age	Open ended	
32	Gender	Multiple Choice	Male, Female
38	In which country do you reside?	Open ended	
39	What best describes your employment status over the last three months	Multiple Choice	Working full-time, Working part-time, Unemployed and looking for work, A homemaker or stay-at-home parent, Student, Retired
41	Yearly Income	Multiple Choice	Less than $40,000, $40,000-$59,000, $60,000-$79,999, $80,000-$99,999, $100,000+, Prefer not to say