UNITED STATES

Soft drinks brand rankings 2025

Revealing America's most considered water, energy and carbonated drinks brands in 2025.

/Research Reality

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Foreword

"In a category defined by loyalty, lifestyle, and rapid innovation, knowing which soft drink brands consumers are actively considering is more important than ever. This report uncovers the brands winning attention across the U.S. market spanning still and sparkling water, energy drinks, and carbonated soft drinks.

With focused insights by category, generation, and gender, we highlight where brands are breaking through, and where there's room to grow. For marketers, brand leaders, and strategists, this is a clear view into the competitive landscape and what it takes to stay top of mind in an increasingly dynamic space."

Kenton Barello
Vice President, YouGov America

Discover the rankings

Report methodology

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Water brand rankings

Top ranked water brands

	Brand	Consideration (% nat rep)
1	Aquafina	20.6
2	Smartwater	18.9
3	VitaminWater	15.9
4	Dasani	15.0
5	Pure Life	13.8
6	Fiji	13.4
7	LaCroix	12.8
8	Poland Spring	12.1
9	Deer Park	9.6
10	Perrier	8.8

Question: When you are in the market next to purchase beverages, from which of the following would you consider purchasing?
YouGov BrandIndex US, May 1, 2024 - April 30, 2025 n=15,800

Top ranked water brands by gender

Men

	Brand	Consideration (% nat rep)
1	Aquafina	22.1
2	Smartwater	16.2
3	VitaminWater	15.4
4	Dasani	14.0
5	Fiji	13.2
6	Pure Life	12.3
7	LaCroix	12.1
8	Poland Spring	11.8
9	Deer Park	9.5
10	Perrier	9.1

Women

	Brand	Consideration (% nat rep)
1	Smartwater	21.1
2	Aquafina	19.4
3	VitaminWater	16.2
4	Dasani	15.8
5	Pure Life	15.0
6	Fiji	13.5
7	LaCroix	13.3
8	Poland Spring	12.3
9	Deer Park	9.7
10	Perrier	8.7

Question: When you are in the market next to purchase beverages, from which of the following would you consider purchasing?
YouGov BrandIndex US, May 1, 2024 - April 30, 2025 n=7,200

Top ranked water brands by generation

Gen Z

	Brand	Consideration (% nat rep)
1	Aquafina	30.8
2	VitaminWater	21.9
3	Fiji	18.6
4	Smartwater	17.9
5	Pure Life	15.8
6	Vita Coco	15.0
7	Ice Mountain	13.3
8	LaCroix	9.7
9	Dasani	9.2
10	Poland Spring	8.4

Millennial

	Brand	Consideration (% nat rep)
1	Smartwater	25.8
2	Aquafina	24.0
3	VitaminWater	22.4
4	Fiji	18.8
5	Pure Life	17.6
6	LaCroix	16.3
7	Dasani	15.0
8	Vita Coco	12.2
9	Poland Spring	11.5
10	Perrier	11.4

Gen X

	Brand	Consideration (% nat rep)
1	Smartwater	23.5
2	Aquafina	20.5
3	VitaminWater	19.2
4	Dasani	18.0
5	Pure Life	15.7
6	Fiji	15.4
7	LaCroix	14.0
8	Poland Spring	13.9
9	Deer Park	10.9
10	Perrier	10.2

Baby Boomers+

	Brand	Consideration (% nat rep)
1	Aquafina	16.0
2	Dasani	15.2
3	Smartwater	13.4
4	Poland Spring	12.6
5	LaCroix	11.2
6	Pure Life	10.4
7	Deer Park	9.8
8	VitaminWater	9.1
9	Fiji	8.1
10	Perrier	8.1

Question: When you are in the market next to purchase beverages, from which of the following would you consider purchasing?
YouGov BrandIndex US, May 1, 2024 - April 30, 2025 n=2,000

Most improved water brands

	Brand	2024 consideration (% nat rep)	2025 consideration (% nat rep)	Increase
1	Pure Life	12.8	13.8	1.0
2	Aquafina	19.8	20.6	0.8
3	Vita Coco	6.1	6.9	0.8
4	VitaminWater	15.1	15.9	0.8
5	LaCroix	12.0	12.8	0.8

Question: When you are in the market next to purchase beverages, from which of the following would you consider purchasing?
YouGov BrandIndex US, May 1, 2023 - April 30, 2024 to May 1, 2024 - April 30, 2025, n=14,800

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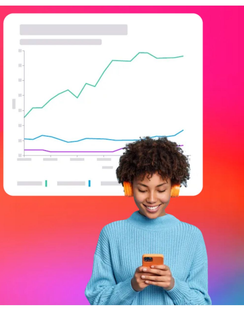

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Energy and hydration drinks brand rankings

Top ranked energy and hydration drinks brands

	Brand	Consideration (% nat rep)
1	Gatorade	30.8
2	Powerade	18.2
3	Red Bull	13.4
4	Monster	12.4
5	BodyArmor	10.7
6	Propel	10.4
7	Powerade Zero	7.3
8	Liquid I.V.	7.2
9	G2	6.8
10	Rockstar	6.2

Question: When you are in the market next to purchase beverages, from which of the following would you consider purchasing?
YouGov BrandIndex US, May 1, 2024 - April 30, 2025, n=15,900

Top ranked energy and hydration drinks brands by gender

Men

	Brand	Consideration (% nat rep)
1	Gatorade	32.7
2	Powerade	20.2
3	Red Bull	18.7
4	Monster	16.3
5	BodyArmor	11.6
6	Propel	10.4
7	G2	8.7
8	Rockstar	8.6
9	Powerade Zero	8.1
10	Celsius	6.9

Women

	Brand	Consideration (% nat rep)
1	Gatorade	29.3
2	Powerade	16.5
3	Propel	10.4
4	BodyArmor	10.0
5	Monster	9.0
6	Red Bull	8.8
7	Liquid I.V.	8.0
8	Powerade Zero	6.5
9	Bai	6.0
10	Celsius	5.3

Question: When you are in the market next to purchase beverages, from which of the following would you consider purchasing?
YouGov BrandIndex US, May 1, 2024 - April 30, 2025, n=7,300

Top ranked energy and hydration drinks brands by generation

Gen Z

	Brand	Consideration (% nat rep)
1	Gatorade	30.4
2	Red Bull	28.9
3	Monster	28.1
4	Powerade	20.1
5	BodyArmor	14.9
6	Liquid I.V.	11.7
7	Celsius	10.6
8	Rockstar	10.3
9	Propel	8.6
10	Bang Energy	7.4

Millennial

	Brand	Consideration (% nat rep)
1	Gatorade	35.3
2	Red Bull	28.0
3	Powerade	22.9
4	Monster	22.3
5	BodyArmor	18.6
6	Propel	13.5
7	Rockstar	12.7
8	Liquid I.V.	12.7
9	Celsius	10.8
10	G2	10.0

Gen X

	Brand	Consideration (% nat rep)
1	Gatorade	37.6
2	Powerade	23.9
3	Propel	13.5
4	BodyArmor	12.8
5	Monster	12.0
6	Red Bull	10.2
7	G2	9.4
8	Powerade Zero	9.4
9	Bai	8.2
10	Liquid I.V.	8.2

Baby Boomers+

	Brand	Consideration (% nat rep)
1	Gatorade	25.5
2	Powerade	12.4
3	Propel	7.9
4	Powerade Zero	5.0
5	G2	4.7
6	BodyArmor	4.4
7	Bai	3.8
8	Monster	2.9
9	Liquid I.V.	2.5
10	Celsius	2.2

Question: When you are in the market next to purchase beverages, from which of the following would you consider purchasing?
YouGov BrandIndex US, May 1, 2024 - April 30, 2025, n=20,000

Most improved energy and hydration drinks brands

	Brand	2024 consideration (% nat rep)	2025 consideration (% nat rep)	Increase
1	Red Bull	10.2	13.4	3.2
2	Celsius	4.6	6.0	1.4
3	Liquid I.V.	5.8	7.2	1.4
4	Monster	11.0	12.4	1.4
5	Prime Hydration	2.6	3.5	0.9
6	C4 energy	2.6	3.4	0.8
7	BodyArmor	10.1	10.7	0.6
8	Rockstar	5.8	6.2	0.4
9	5-Hour Energy	4.1	4.4	0.3
10	AMP	1.7	1.8	0.1

Question: When you are in the market next to purchase beverages, from which of the following would you consider purchasing?
YouGov BrandIndex US, May 1, 2023 - April 30, 2024 to May 1, 2024 - April 30, 2025, n=14,700

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Carbonated soft drink brand rankings

Top ranked carbonated soft drink brands

	Brand	Consideration (% nat rep)
1	Coca-Cola	35.0
2	Pepsi	27.0
3	Sprite	24.9
4	Canada Dry	21.0
5	Dr Pepper	20.6
6	7UP	20.3
7	A&W	17.4
8	Coca-Cola Zero	16.4
9	Diet Coke	15.7
10	Mountain Dew	14.9

Question: When you are in the market next to purchase beverages, from which of the following would you consider purchasing?

YouGov BrandIndex US, May 1, 2024 - April 30, 2025, n=24,800

Top ranked carbonated soft drink brands by gender

Men

	Brand	Consideration (% nat rep)
1	Coca-Cola	39.6
2	Pepsi	30.4
3	Sprite	25.5
4	7UP	23.0
5	Dr Pepper	20.8
6	Canada Dry	19.5
7	Coca-Cola Zero	18.8
8	A&W	17.4
9	Mountain Dew	17.2
10	Diet Coke	16.1

Women

	Brand	Consideration (% nat rep)
1	Coca-Cola	31.1
2	Sprite	24.5
3	Pepsi	24.0
4	Canada Dry	22.3
5	Dr Pepper	20.3
6	7UP	17.9
7	A&W	17.4
8	Diet Coke	15.4
9	Coca-Cola Zero	14.4
10	Mountain Dew	13.0

Question: When you are in the market next to purchase beverages, from which of the following would you consider purchasing?

YouGov BrandIndex US, May 1, 2024 - April 30, 2025, n=11,400

Top ranked carbonated soft drink brands by generation

Gen Z

	Brand	Consideration (% nat rep)
1	Coca-Cola	50.7
2	Pepsi	39.2
3	Sprite	37.9
4	7UP	26.5
5	Mountain Dew	20.8
6	Dr Pepper	18.6
7	Coca-Cola Zero	17.2
8	Diet Coke	13.4
9	Canada Dry	12.7
10	Crush	11.5

Millennial

	Brand	Consideration (% nat rep)
1	Coca-Cola	45.4
2	Pepsi	37.0
3	Sprite	31.0
4	Dr Pepper	25.9
5	7UP	25.3
6	Mountain Dew	21.6
7	Coca-Cola Zero	20.1
8	Canada Dry	18.7
9	Crush	14.7
10	A&W	14.5

Gen X

	Brand	Consideration (% nat rep)
1	Coca-Cola	34.3
2	Sprite	27.3
3	Pepsi	26.0
4	Dr Pepper	25.6
5	Canada Dry	23.9
6	A&W	20.3
7	7UP	20.1
8	Mountain Dew	18.3
9	Coca-Cola Zero	17.7
10	Barq's	16.7

Baby Boomers+

	Brand	Consideration (% nat rep)
1	Coca-Cola	24.7
2	Canada Dry	23.4
3	A&W	19.9
4	Pepsi	18.2
5	Diet Coke	17.5
6	Sprite	16.5
7	Dr Pepper	15.8
8	7UP	15.7
9	Barq's	14.8
10	Coca-Cola Zero	13.5

Question: When you are in the market next to purchase beverages, from which of the following would you consider purchasing?

YouGov BrandIndex US, May 1, 2024 - April 30, 2025, n=3,300

Most improved carbonated soft drink brands

	Brand	2024 consideration (% nat rep)	2025 consideration (% nat rep)	Increase
1	Coca-Cola	32.3	35.0	2.7
2	Pepsi	24.7	27.0	2.3
3	Coca-Cola Zero	14.9	16.4	1.5
4	7UP	18.8	20.3	1.5
5	Sprite	23.7	24.9	1.2
6	Pepsi Zero Sugar	8.5	9.2	0.7
7	Starry	4.9	5.1	0.2
8	Fresca	6.8	7.0	0.2
9	Diet Dr. Pepper	10.9	11.0	0.1
10	Canada Dry	20.9	21.0	0.1

Question: When you are in the market next to purchase beverages, from which of the following would you consider purchasing?

YouGov BrandIndex US, May 1, 2023 - April 30, 2024 to May 1, 2024 - April 30, 2025, n=23,900

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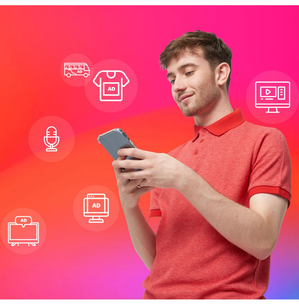

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Profiling American soft drinks consumers

Over half of all Americans drink bottled water at least once per week

More than one in three American consumers drink regular carbonated drinks weekly (36%), while 27% drink diet versions of carbonated drinks.

On average, how often, if at all, do you drink the following drinks weekly....

52% Bottled water

36% Regular carbonated drinks

27% Diet carbonated drinks

16% Energy drinks

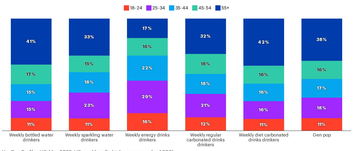
15% Sparkling water

YouGov Profiles US May 2025. Gen Pop (n=32,100)

Energy drinks are significantly more likely to be consumed by Americans under 35, while 55+ leads for diet carbonated drinks compared to nat rep

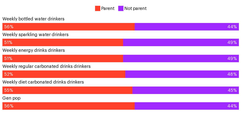
Bottled water is more likely to be consumed by Americans age 55+.

Breakdown of weekly consumers by age group per drink type:



YouGov Profiles US. May 2025. US weekly soft drink consumers (n=4,900)

Are you a parent or guardian? Please select all that apply.



YouGov Profiles US. May 2025. US weekly soft drink consumers (n=4,700)

Rebased by excluding respondents who selected 'Don't know/Prefer not to say'

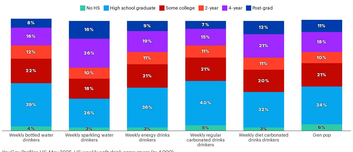
The parents' choice

Sparkling water, energy drinks, and regular carbonated drinks drinkers are less likely to be a parent.

Weekly sparkling water drinkers are most likely to have completed a post-grad or 4-year degree

Weekly regular carbonated drinks drinkers are the least likely.

What is the highest level of education you have completed?

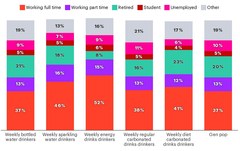


YouGov Profiles US. May 2025. US weekly soft drink consumers (n=4,900)

Fueling the grind: Weekly energy drinks drinkers are the most likely to be full time workers

Weekly bottled water drinkers and weekly diet carbonated drinks drinkers are the most likely not to work full time – with a higher percentage being retired.

Which, if any, of the following options best describes your current employment status?



YouGov Profiles US. May 2025. US weekly soft drink consumers (n=4,900)

Rebased by excluding respondents who selected 'Prefer not to say'

What gender do you identify as?

YouGov Profiles US. May 2025. US weekly soft drink consumers (n=4,900)

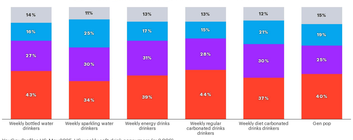
Weekly energy drinks drinkers are most likely to be male

While weekly bottled water drinkers are most likely to be female.

Weekly sparkling water drinkers are most likely to earn over $100,000 compared to gen pop

Energy drinks drinkers are the least likely.

What is your gross household income?



YouGov Profiles US. May 2025. US weekly soft drink consumers (n=2,000)

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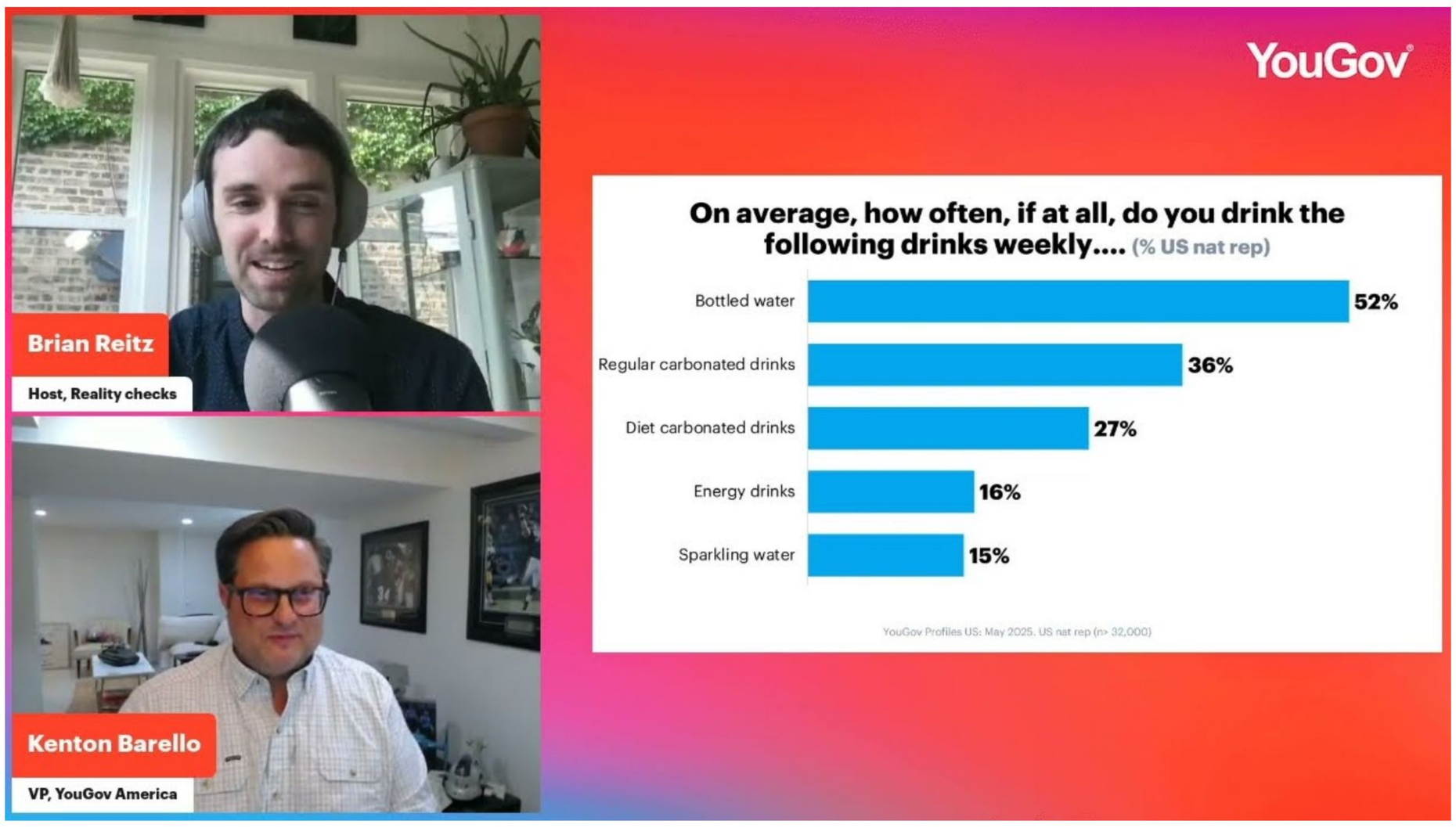

Coca-Cola captures consumer consideration

More Americans consider purchasing **Coca-Cola** (35%) than any other soft drink or beverage, driven by high consideration among men (40%) and Gen Z (51%).

Within its category, Coca-Cola also improved the most year-over-year (+2.7 percentage-points since 2024).

PepsiCo produces winners in water & hyrdration

52% of Americans drink bottled water weekly, and PepsiCo's **Aquafina** leads in consideration with US nat rep (21%) and Gen Z (31%).

Among energy & hydration brands, **Gatorade** (31%) leads with all generations, but **Red Bull** supplants **Powerade** as #2 among both Gen Z and Millennials.

Eyes on the improvers across the categories

For water brands, **Pure Life** (+1.0), **Aquafina** (+0.9), and **Vita Coco** (+0.9) grew most in consideration since 2024.

Among energy & hydration brands, **Red Bull** (+3.2), **Celsius** (+1.4), and **Liquid IV.** (+1.4) improved most year-over-year.

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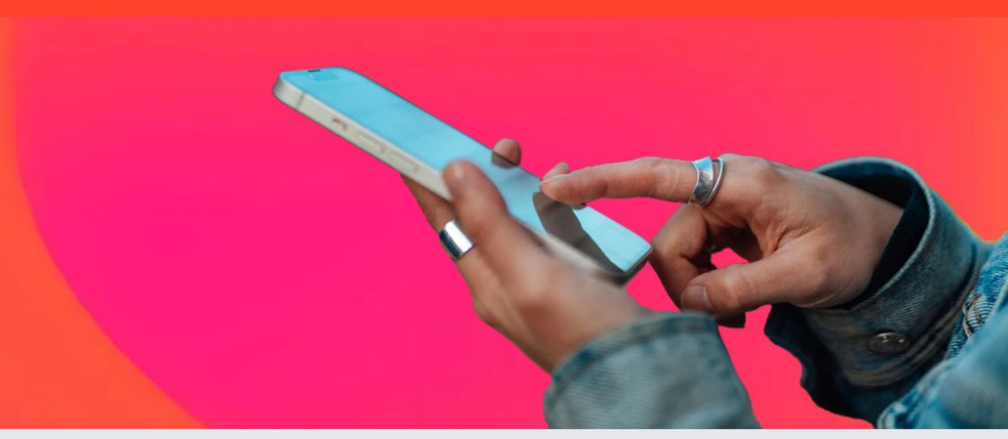

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The insights in this report sourced via YouGov BrandIndex and YouGov Profiles – providing rapid answers from the right audience.

- In this report, we have highlighted the top performing water, energy and carbonated soft drink brands that are winning over residents of the United States based on consideration scores. This data is sourced YouGov's always-on brand tracker, YouGov BrandIndex.
- Consideration scores are based on respondents' answers to: "When you are in the market next to purchase beverages, from which of the following would you consider purchasing?"
- To qualify as a top ranked brand, brands must have scores available for at least 183 days between May 1, 2024 and April 30, 2025. A minimum base size of 300 (N) is required.
- To qualify as a most improved brand, brands must have scores for at least 18 months (548 days) between May 1, 2023, and April 30, 2025. Top improvers are ranked based on the change to their consideration scores. In cases where the change in scores is the same, the current scores are used as a secondary metric to determine their ranking. A minimum base size of 300 (N) is required. Data rounded to nearest decimal point, and improver differences calculated from the rounded scores.
- The profile deep dive in this report was powered by YouGov Profiles – an ever-growing source of living consumer data, with 2+ million data variables from YouGov's 29+ million global panelists. The data used in this report was accessed via Profiles+ USA 2025-05-18. Data shown reflects a 52-week average.
- "US weekly soft drink consumers" are defined as respondents who report drinking water, energy drinks, and carbonated soft drinks at least once per week, based on their answer to the question: "On average, how often, if at all, do you drink...?".
- Throughout the report, each generation is defined as: Gen Z (Born 1997-2012), Millennial (Born 1981-1996), Gen X (Born 1965-1980), and Baby Boomer+ (Born before 1964).

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