

YouGov / Portman Group survey on Low Alcohol Alternatives 2020



Overview

- In its second annual survey of low alcohol products, the Portman Group commissioned YouGov to conduct an online survey of public attitudes to low alcohol alternatives (products with an ABV of above 0.05% and up to 1.2%).
- The 2019 survey included 2,008 adults across Britain between 18-19 November 2019. The figures have been weighted and are representative of all GB adults (aged 18+). All figures, unless otherwise stated, are from YouGov PLC.

The 2019 survey results show:

- Over three quarters (76%) of those surveyed said they either did not drink or drank within the UK Chief Medical Officer's lower-risk guidelines of 14 units in an average week.
- Over half (59%) of British adults who drink alcohol in an average week have at least tried a lower alcohol alternative product. However, 30% of those who drink alcohol in an average week say they have yet to try a low alcohol product and, concerningly, 13% of all adults do not recall seeing a low alcohol option available for sale anywhere.
- Almost a quarter (23%) of those who drink alcohol said that they had either already switched the majority of their drinking to lower alcoholic options or were likely to consider switching any of their drinking to low alcohol alternatives in the next six months. This is similar to our previous survey in 2018, showing that public interest in low alcoholic options has not waned.
- Once again the intention to switch is being led by younger drinkers, with almost one in ten (9%) 18-24 year olds saying that they had already switched the majority of their drinking to lower alcohol options, whilst a quarter (25%) of 25-34 year olds said they would consider switching any alcoholic beverages they would usually drink to low alcohol alternatives in the next six months.
- The reasons given for why low alcohol beverages appeal reflect increasingly responsible attitudes to drinking across all age groups, ranging from being able to drive home after social events (31%) to reducing the risk of long-term physical health problems (22%).
- However, the survey highlights a significant gap between the British public's desire for wider availability of lower alcohol alternatives beyond pubs and supermarkets, and a perceived failure to provide these options in restaurants, nightclubs and events.

Ensuring the continued growth of the low and no alcohol category

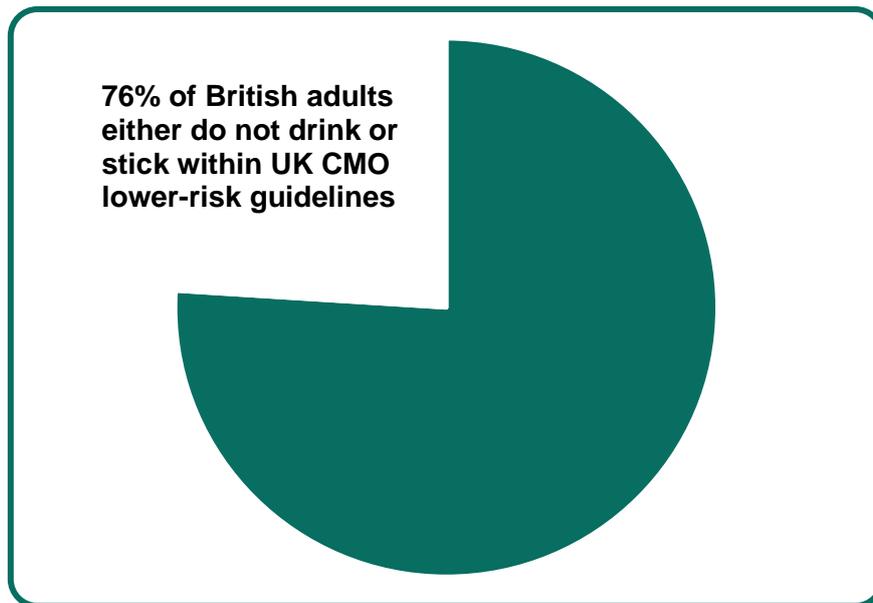
The Portman Group is keen to support the future growth of the low and no alcohol category to give consumers a wider range of lower-strength products to help them drink responsibly. We call on all licensed outlets to stock low and no alternatives to broaden consumer choice. We also ask the UK Government to update the current system of product descriptors to give consumers clarity and consistency regarding the terms used on the products they are purchasing. Namely by raising the 'alcohol free' threshold from 0.05% ABV to 0.5% ABV to bring the UK in line with other European countries and introducing a minimum strength of above 0.5% ABV to the category of 'low alcohol', to go up to and include 1.2% ABV.

Survey Results

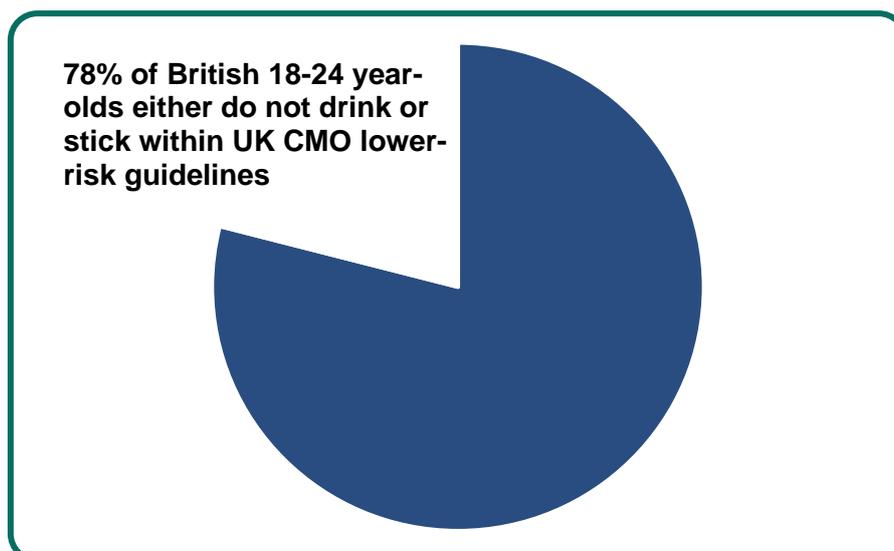
Current alcohol consumption – the vast majority of the British public are responsible drinkers

76% of adults surveyed said they either did not drink or drank within the UK Chief Medical Officer's lower-risk guidelines of 14 units in an average week.

Crucially, just 3% of the British adult population admit to drinking more than 35 units in an average week (6% of respondents either said that they did not know or would prefer not to say). Higher risk levels are defined by the NHS as more than 35 units for women and 50 units for men per week.



The results also reinforce the ongoing rise of so-called 'Generation Sensible', with 78% of 18-24 year-olds saying they do not drink or drink within the guidelines.



Over half of British adults have at least tried a lower alcohol alternative

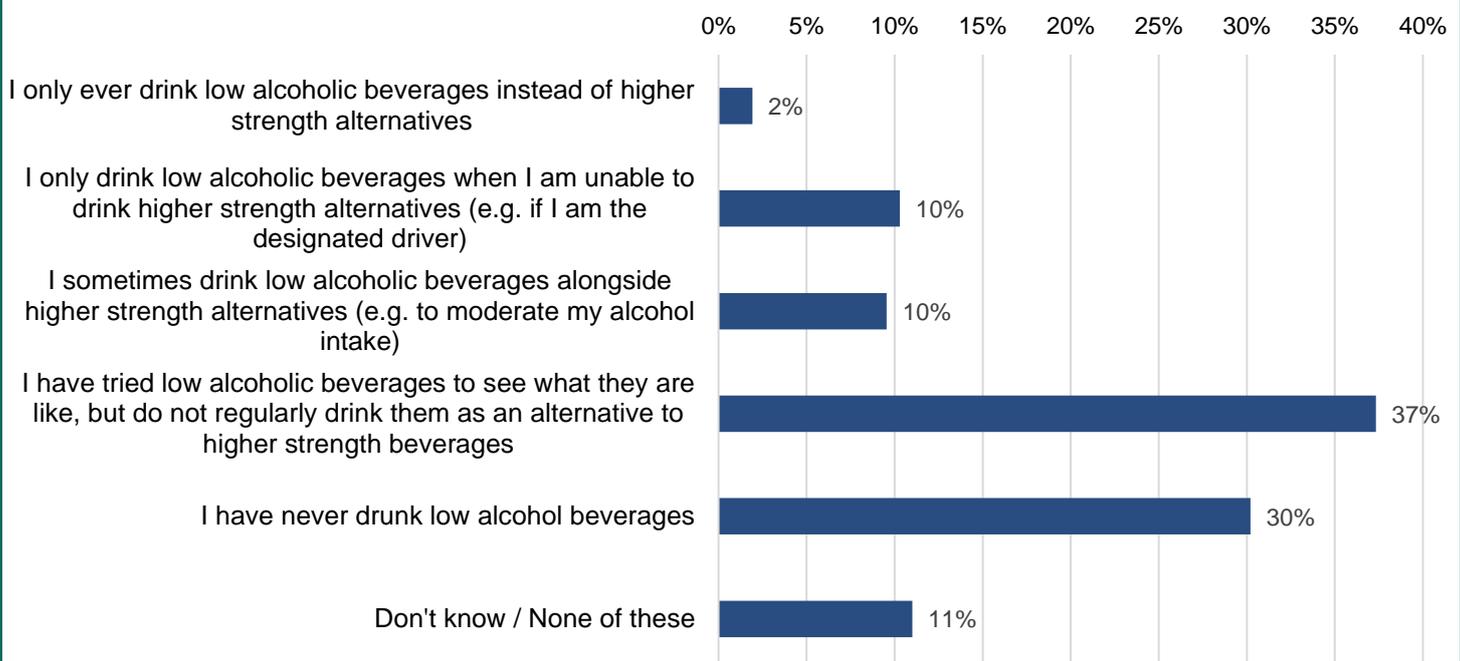
59% of British adults surveyed who drink alcohol in an average week have at least tried a low alcohol alternative, whilst 30% say they have yet to try a product.

The results show that 10% of these adults drink these products only when they are unable to drink a high-strength alternative, such as when they intend to drive, but still want an alcohol alternative.

Whereas 10% say they sometimes drink lower-strength alternatives alongside higher-strength products, for example to help them moderate their drinking.

This highlights how encouraging substituting products for lower-strength alternatives during sittings could be a useful strategy for helping people stick within the CMO's lower-risk guidelines.

What best describes your consumption of low alcohol beverages?



No: 1,246 - All GB adults who drink alcohol in an average week

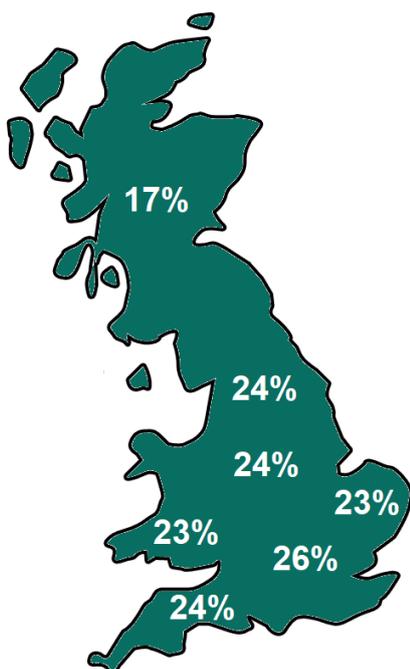
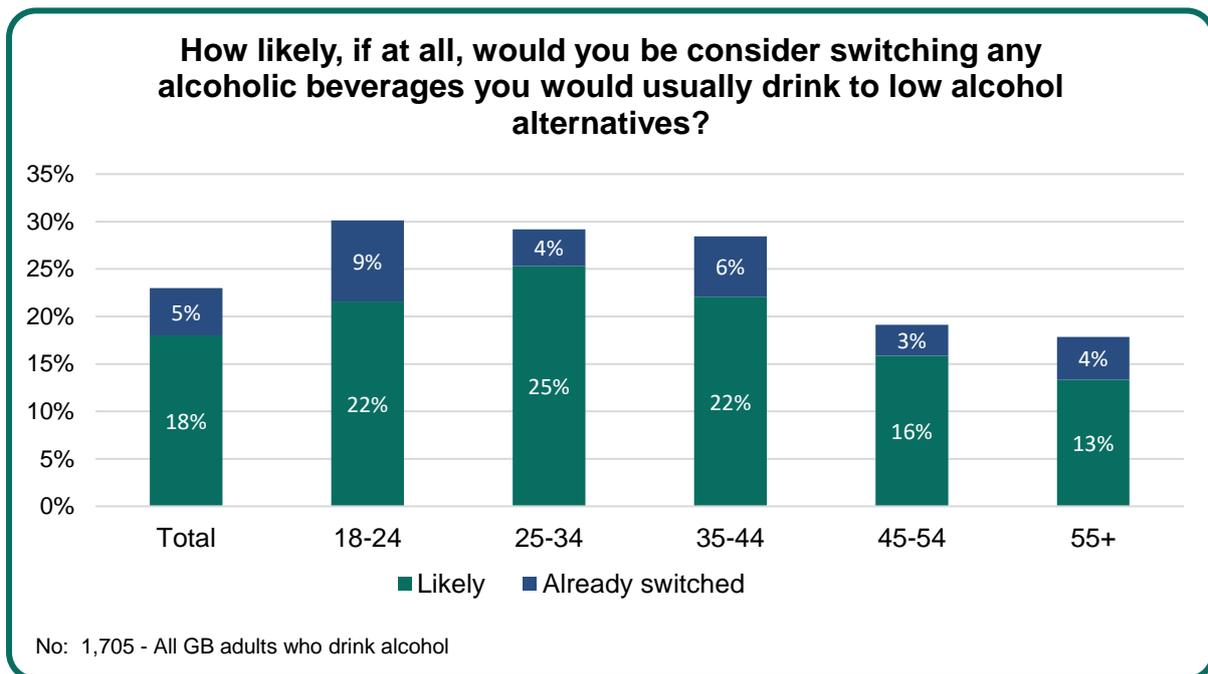
The results are largely consistent across every age group, with over half of each group who drink alcohol in an average week at least sampling a lower alcohol product:

- 25-34 year olds are the age group most likely to have at least tried a low alcohol alternative (62%);
- 35-44 year olds are the most likely to drink low alcohol alternatives alongside higher strength alternatives (13%);
- Those aged 55 and over are most likely to say they only drink lower alcohol alternatives when unable to drink a high-strength alternative, such as when they intend to drive (12%).

The public remains interested in switching to lower alcohol alternatives

Our results show that almost a quarter of British adults who drink alcohol (23%) said that either they had switched the majority of their drinking or were likely to consider switching any alcoholic beverages they would usually drink to lower alcoholic options in the next six months. These results are similar to our previous survey in 2018, showing that public interest in low alcoholic options has not waned. Furthermore, women were more likely to switch (21%), than men (15%).

Once again, the intention to switch is being led by younger drinkers, with almost one in ten (9%) of 18-24 year olds saying that they had already switched the majority of their drinking to lower alcohol options. A quarter (25%) of 25-34 year olds said they were likely to switch any alcoholic beverages they would usually drink to low alcohol alternatives in the next.



This interest in switching (or already switched) to low and no products is felt across the country, ranging from 26% in London to 17% in Scotland.

Furthermore, the highest rates of those saying they had already switched the majority of their alcoholic drinks to a low option can be found outside of London – with 7% of respondents in the North of England already switched and 6% in the South and East, compared to 3% in London.

Britons are switching to lower alcohol alternatives for a range of reasons

The reasons given for opting for low alcohol beverages reflect increasingly responsible attitudes to drinking across all age groups in the UK.

Nearly a third of those surveyed who drink alcohol (31%) cited being able to drive home from social events was a reason why low alcohol beverages appealed to them, while almost a quarter (23%) cited being social without drinking excessively as a factor.

The results also reflect an increasingly health awareness across Britain. 22% of respondents who drink alcohol cited reducing the possibility of developing long-term physical health problems such as liver disease as a reason why low alcohol beverages would appeal to them, and 13% cited reducing possible mental health problems. Furthermore, 12% said that lower alcohol drinks would appeal to them to stay within the low risk drinking guidelines.

Which, if any, of the following are reasons why low alcohol beverages would appeal to you in comparison to normal alcoholic beverages? (Please select all that apply)



No: 1705 - All GB adults who drink alcohol

These results largely mirror the findings of the 2018 survey.

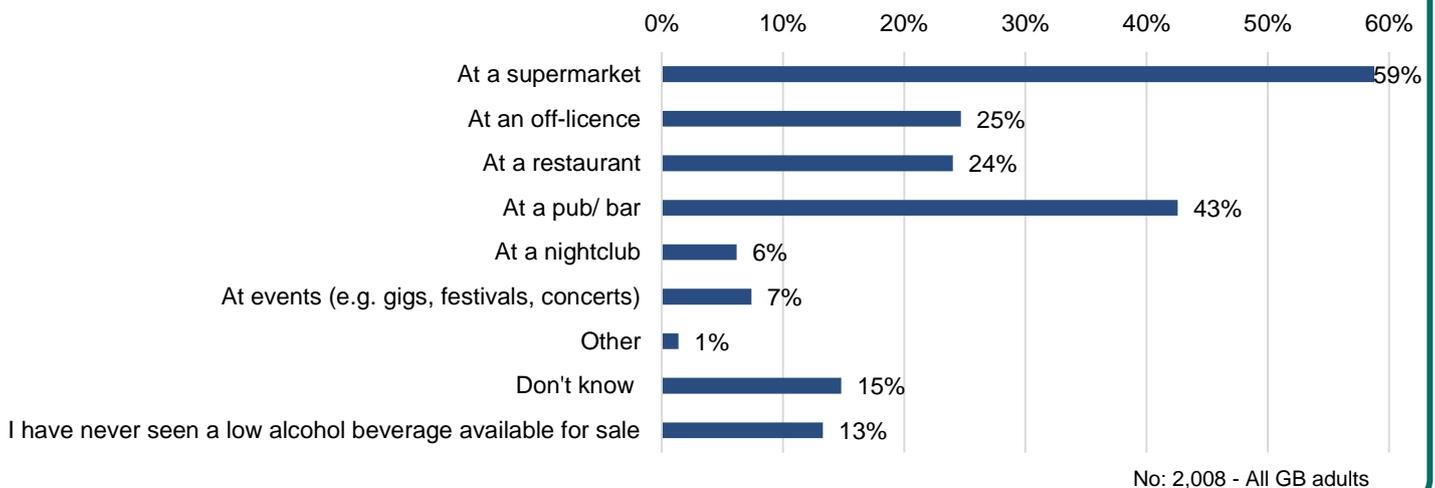
Younger drinkers are more likely to cite health concerns (liver disease, hangovers and mental health concerns) for the appeal of low alcohol beverages compared to older drinkers, who are more likely to cite practical concerns such as being able to drive home.

There is a disparity between demand and widespread availability

The supermarket (59%) and pub / bar (43%) are the locations which most respondents recall seeing a low alcoholic product available for sale. However, only a minority of respondents can recall finding low alcohol options in other familiar outlets such as off-licences (25%) and restaurants (24%).

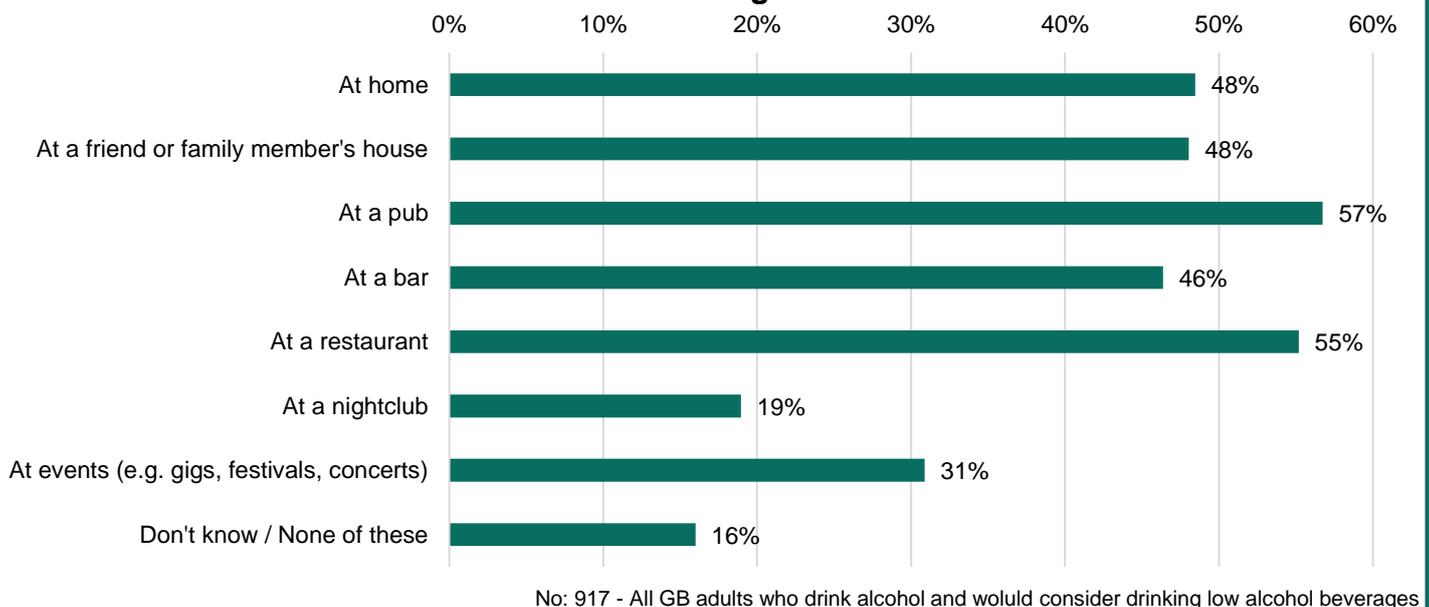
Concerningly, 13% of all adults do not recall seeing a low alcohol option available for sale anywhere. This ranges from 17% in the North West of England and West Midlands and to 9% in Yorkshire and the Humber.

In which of the following locations have you ever seen a low alcohol beverage available for sale?



Consistent with last year's survey, the 2019 results show widespread public interest in drinking low alcohol beverages both at home and out at bars, restaurants and clubs.

In which of the following locations would you consider drinking low alcohol beverages?

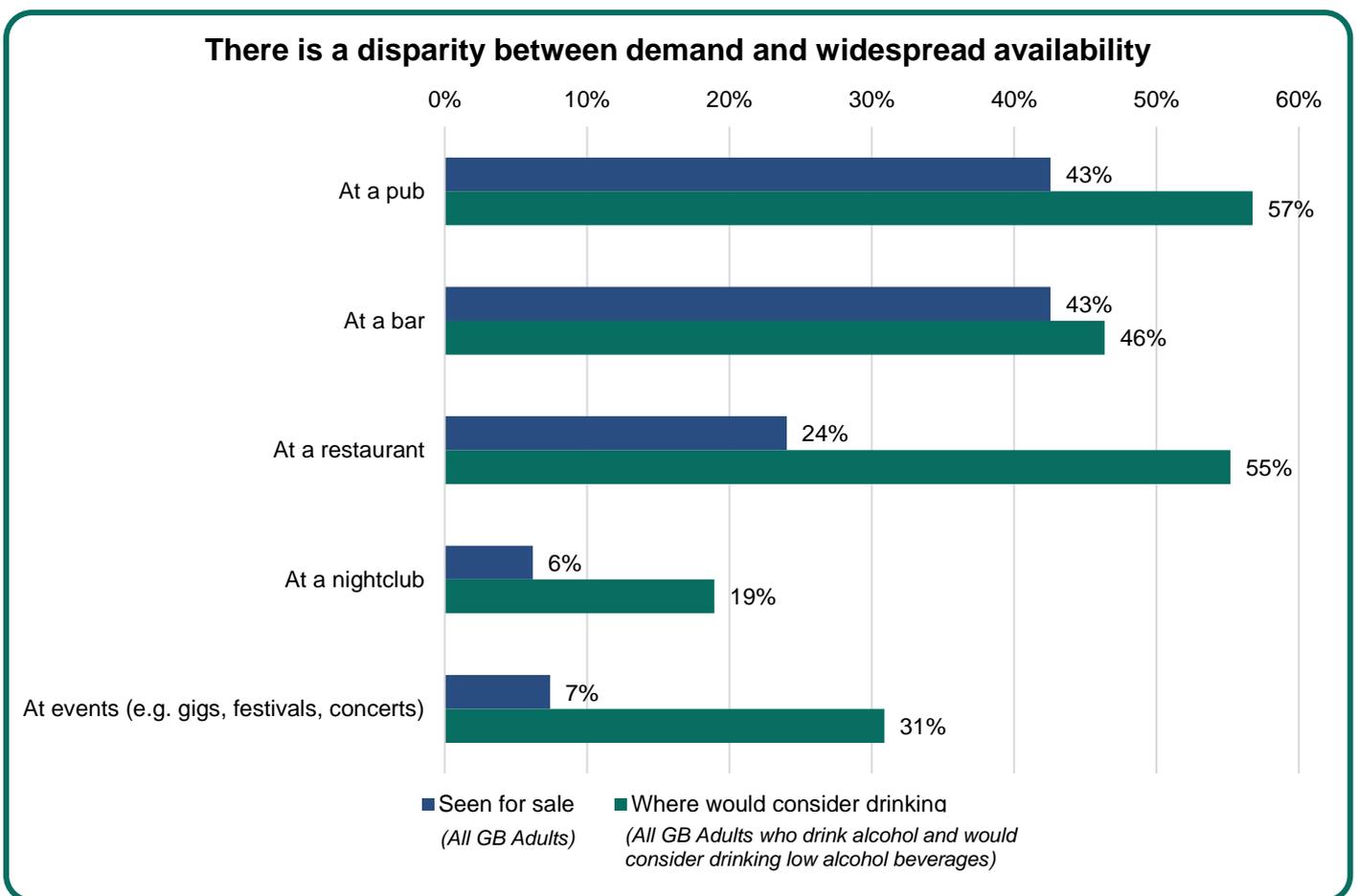


However, the survey highlights a significant gap between the British public's desire for widespread availability of lower alcohol alternatives and where these products are seen for sale.

This gap is especially prevalent beyond the traditional pub and bar outlets, with 55% of respondents who drink alcohol and would consider drinking low alcohol beverages interested in drinking a low alcohol beverage in a restaurant compared with only 24% of adults surveyed recalling seeing a low alcohol option for sale.

Similar large gaps are seen at entertainment venues such as nightclubs (19% vs 6%) and at events such as festivals or concerts (31% vs 7%).

This indicates that the British public want lower alcohol options available beyond pubs and bars, to provide greater choice wherever higher strength alternatives are sold.



The way forward – how can we foster greater innovation?

The Portman Group is supporting the future growth of the low and no alcohol category to help consumers drink responsibly.

Our member companies also share the UK Department of Health and Social Care's desire to this category grow "further and faster" and this is reflected in the substantial investments made to increase the range of products on the market.¹

We believe for the opportunities to be fully realised there needs to be greater availability of these products beyond supermarkets and pubs, as well as clearer labelling to avoid consumer confusion around the various descriptions used in the category.

Updating the current system of product descriptors for clarity and consistency

Our own research and experience show that both consumers and producers find the current low alcohol descriptors confusing. We call on the UK Government to introduce greater consistency and clarity for low and no alcohol product descriptors.

We believe that the following would aid consumers' decision making:

- **Alcohol free:** Raising the 'alcohol free' threshold from 0.05% ABV to 0.5% ABV to bring the UK in line with other European countries and the definition of 'alcohol' in the 2003 Licensing Act.
- **Low alcohol:** Introducing a minimum strength of above 0.5% ABV to the category of 'low alcohol', to go up to and include 1.2% ABV.
- **Removing the term 'de-alcoholised'**, as our previous research has shown that consumers find this confusing. Products should still communicate if alcohol has been extracted from the final product, but need not do so through the descriptor on the front label.
- The term **non-alcoholic** is already widely used and should be permitted broader use to apply to all products below 0.5% ABV.
- Products above 1.2% are required by law to display ABV. We would encourage all producers to include ABV for products below 1.2% to help consumers understand what they are purchasing.
- We would encourage the UK Government to seek UK-wide agreement on low and no descriptors, to avoid more confusion and inconsistency across the devolved nations.

Ensuring wider availability to meet rising consumer demand

Our research above shows consumer enthusiasm, especially among younger drinkers, for low and no alternatives to be available in a wider variety of settings. We call on all licensed outlets which have traditionally not had a non-alcoholic option beyond soft drinks (such as nightclubs, music venues and festivals) to stock low and no alternatives to broaden consumer choice.

¹ [Department of Health and Social Care: Advancing our health: prevention in the 2020s](#), 22 July 2019

Portman Group member companies continue to lead innovation to make low and no alcohol products more accessible. Examples include:

- **Bacardi** has launched an alcohol-free sparkling drink under its popular Martini brand – 'Martini 0.0% Dolce'.
- **Budweiser Brewing Group** has a commitment that no and low beer products will represent at least 20% of its global beer volumes by the end of 2025.
- **Carlsberg** aim to offer an alcohol-free alternative wherever its alcoholic options are sold by 2022.
- **Diageo** has invested in non-alcoholic drinks company Seedlip and launched an ultra-low Gordon's Gin & Tonic flavoured drink in the UK.
- **Heineken** has partnered with Club Soda to support mindful drinking festivals and plan to roll out Heineken @ 0.0 draught beer to 1,500 pubs through its Blade countertop draught system.
- **Molson Coors** already offer UK consumers a range of no/low products and aims to offer these products in all countries in which it has a presence by 2025.
- **Pernod Ricard** has launched non-alcoholic premium drink Ceder's in the UK, the company's first non-alcoholic alternative to gin.



For more information please contact – comms@portmangroup.org.uk January 2020