Consumer views on Low and No Alcohol products 2022

Scotland leads the market

CONTENTS

With thanks to
David Saer, Senior Policy and Public Affairs Manager for managing the research and writing this report. Also thanks to our partner YouGov for carrying out the study.

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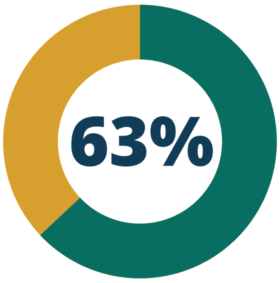
OVERVIEW

In its fifth annual survey looking at low and no alcohol alternatives, the Portman Group commissioned the market research company YouGov to conduct an online survey of UK public attitudes to low and no alcohol products (those with an ABV below 1.2%). We seek to chart the continuing popularity of these products among UK consumers and understand what attracted them to the category.

YouGov surveyed 2,381 adults from across the UK online between 28 and 29 November. The figures have been weighted and are representative of all UK adults (aged 18+). All figures, unless otherwise stated, are from YouGov Plc.

KEY FINDINGS



Just under two-thirds of UK adults had at least tried a low and no product.

71%

Of alcohol drinkers have at least tried these products, compared to only 31% of non-drinkers.

Over

Of UK drinkers now 'semi-regularly'* consume low and no alcohol products (29%).

1 in 5 (21%)

Of respondents who drank alcohol said that their weekly consumption has decreased since first trying a low and no alcohol alternative**.

85%

Of low and no drinkers entered the category through a brand-shared product, compared to 15% who entered the category through a product independent of any alcohol branding***.

For the fifth year in a row, the most cited reasons for why consumers choose low and no alcohol are to drive home and not drink excessively at social events.

57%

* Incorporating those who responded drinking low and no alcohol either 'often' or 'sometimes').
** Removing those who did not drink alcohol before first trying a low/no alternative.
*** Removing those who selected neither, assuming they cannot recall what first drew them to the low and no category.

KEY FINDINGS

Scotland leads in terms of alcohol drinkers substituting with low and no, with nearly a third (32%) semi-regularly drinking low and no products - a significant increase compared to 2021 (29%).

This compares to 29% in England and 19% in Wales drinking low and no.

Semi-regular* use is most common amongst those drinkers aged between 35-44 and 18-24

18-24 31%
25-34 29%
35-44 34%

79.5%
Of respondents were alcohol drinkers

20.5%
Were not alcohol drinkers

The largest proportion of non-drinkers were amongst those aged 18-24 years old (73% drinkers vs 27% non-drinkers), reinforcing previous trends deeming them 'Generation Sober'.

* Incorporating those who responded drinking low and no alcohol either 'often' or 'sometimes').

KEY FINDINGS

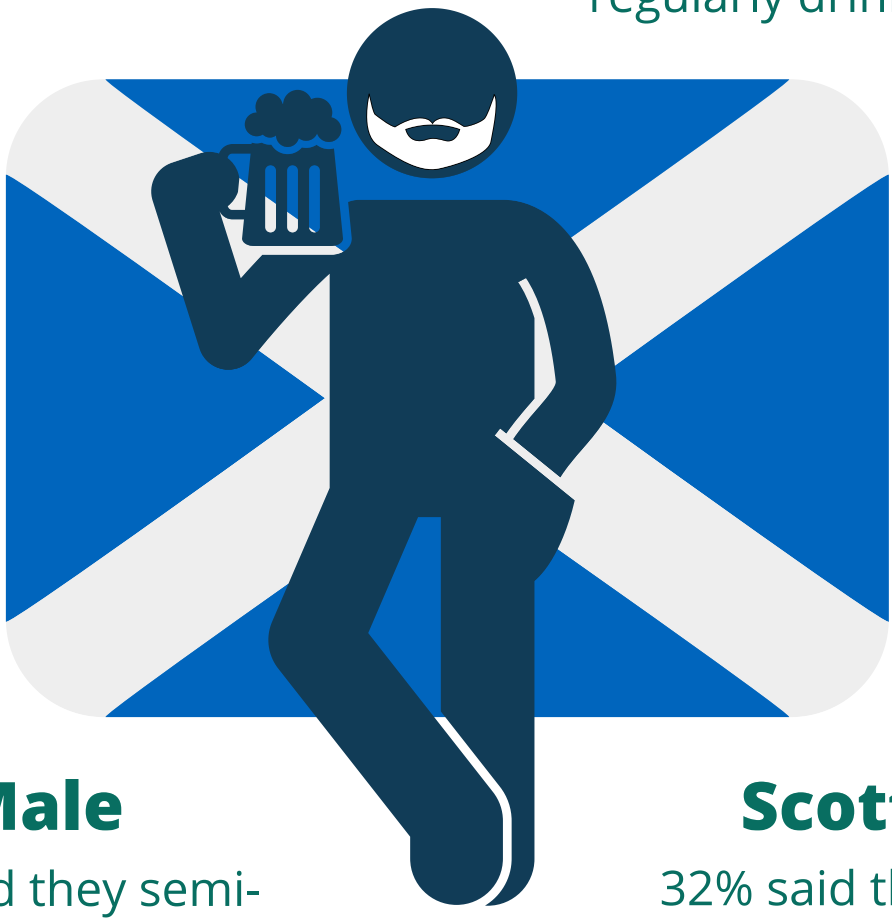
The typical low and no drinker is:

An alcohol drinker

80% of respondents

Aged 35-44

34% said they semi-regularly drink low and no



Male

28% said they semi-regularly drink low and no

Scottish

32% said they semi-regularly drink low and no

As a result, over a quarter (26%) of Scottish drinkers have cut back their weekly alcohol consumption.

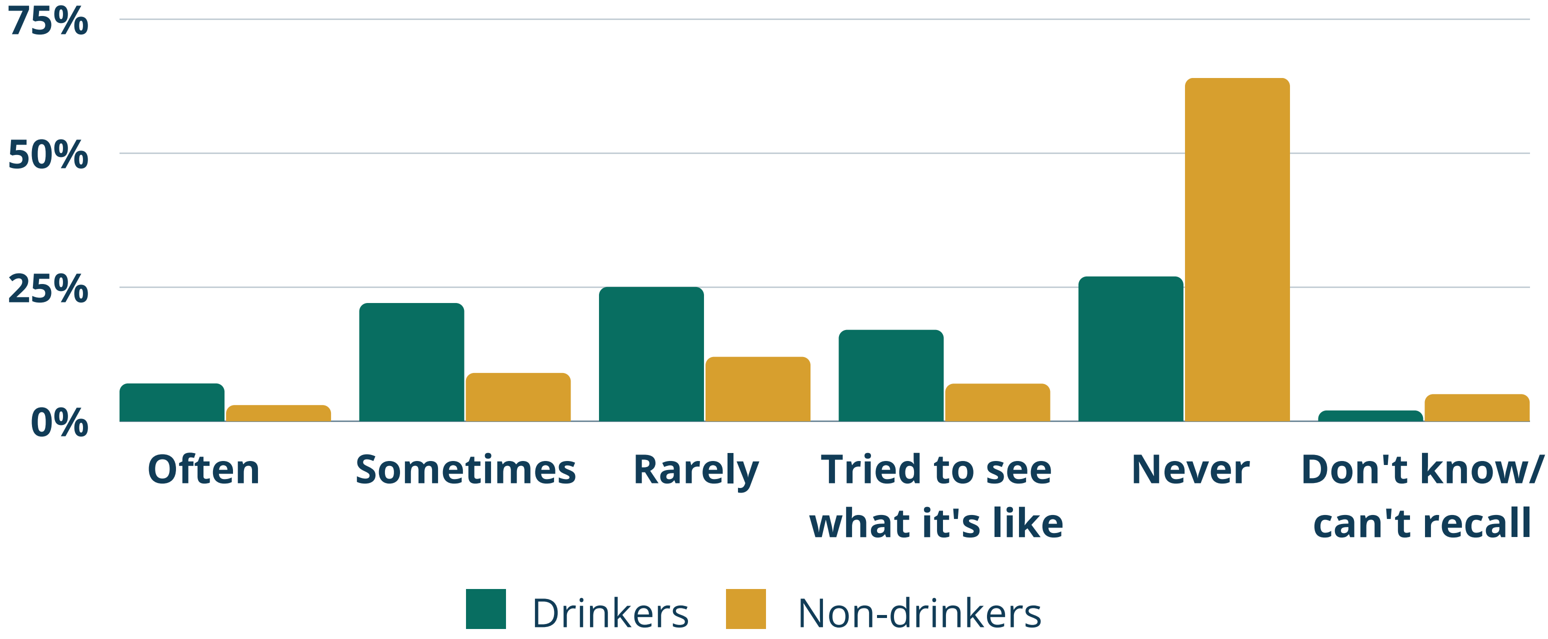
SURVEY RESULTS

Alcohol drinkers remain the main consumers of low and no alcohol

In our UK-wide sample, 79.5% (1,893) of respondents said that they drank alcoholic beverages, compared to 20.5% (488) who did not. The largest proportion of non-drinkers were amongst those aged 18-24 years old (73% drinkers vs 27% non-drinkers). This reinforces figures in Government surveys from across the UK [1] showing lower levels of alcohol consumption in this cohort compared to previous generations, leading to the ongoing moniker 'Generation Sober'.

Overall, just under two-thirds (63%)* of UK adults had at least tried a low and no product, a relative stabilisation compared to 64%* in 2021 and 62.5% in our 2020 survey. However, use of low and no products is driven by current alcohol drinkers, with close to three-quarters (71%) at least trying these products, compared to only 31% of non-drinkers.

Low and no consumption is being driven by UK drinkers



No. of respondents: 2381 - All UK adults; YouGov, 28-29 November 2022

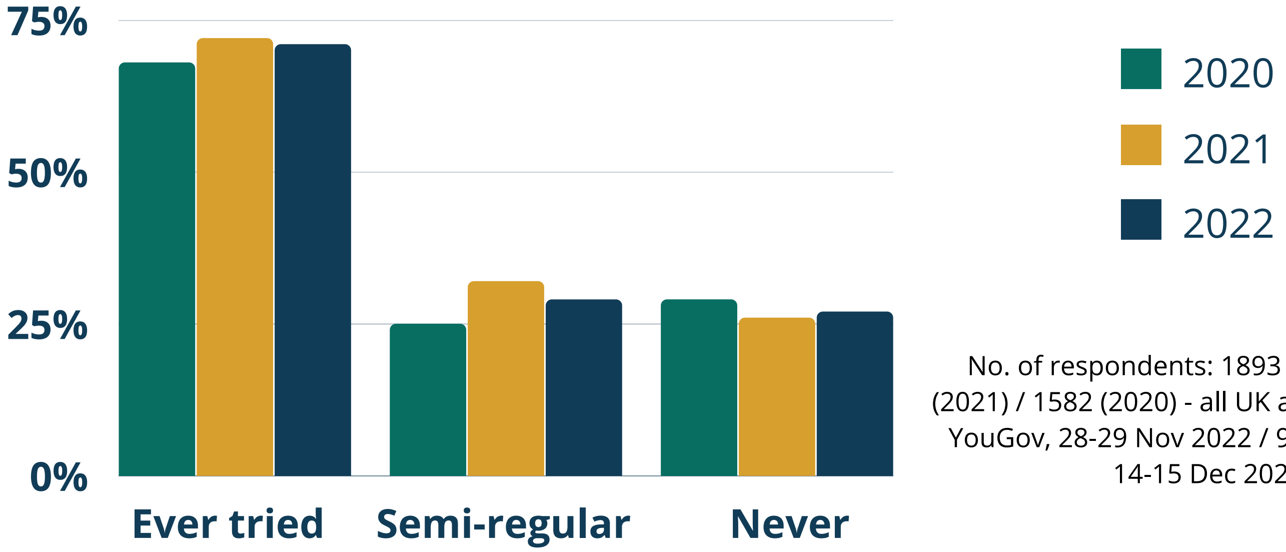
* PG calculation made by rebasing the results taking into account both UK drinkers and non-drinkers

SURVEY RESULTS

Over a quarter (29%) of UK drinkers are 'semi-regular' drinkers of low and no alcohol products (incorporating 7% of respondents who drink these products 'often' and 22% who drink them 'sometimes'), whilst a further quarter (25%) drink them rarely.

Our results suggest a relative plateauing of low and no use compared to the significant growth previously witnessed in our surveys in 2021 and 2020. The proportion of UK drinkers who have ever tried a low and no alcohol product in 2022 (71%) remains similar to 2021 (72%) which was an increase on 2020 at 68%. A similar story is seen in semi-regular use amongst UK drinkers, which declined slightly from 32% in 2021 to 29% in 2022, though still a significant increase compared to 2020 (25%).

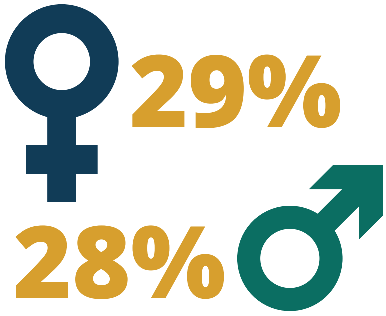
Plateauing low and no consumption amongst UK drinkers



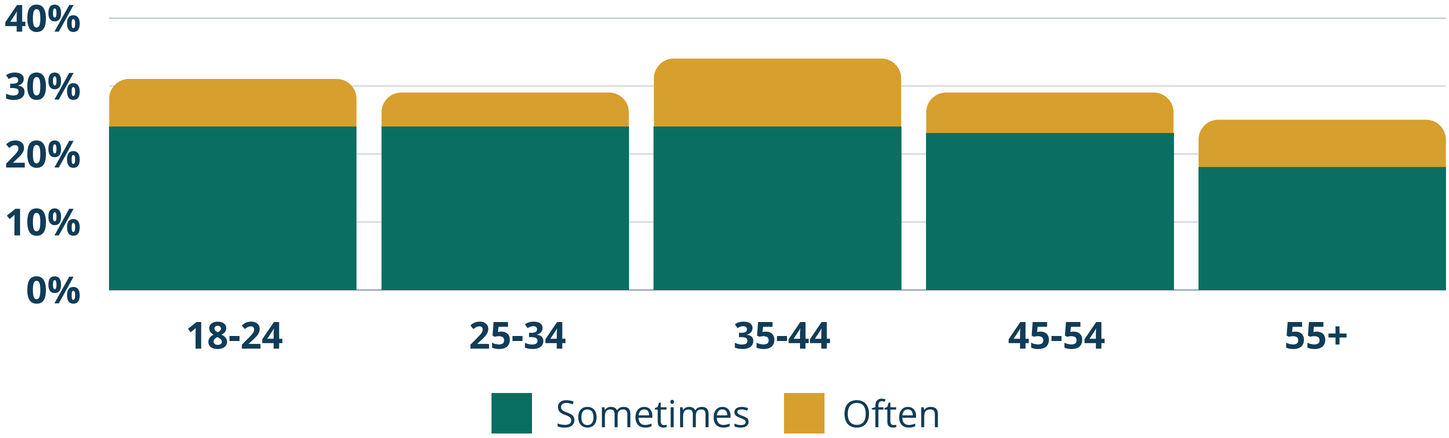
No. of respondents: 1893 (2022) / 1614 (2021) / 1582 (2020) - all UK adults who drink YouGov, 28-29 Nov 2022 / 9-10 Dec 2021 / 14-15 Dec 2020

SURVEY RESULTS

On the whole, male and female respondents are just as likely to be semi-regular low and no alcohol consumers - at 28% and 29% respectively amongst alcohol drinkers and 14% and 11% of non-drinkers.

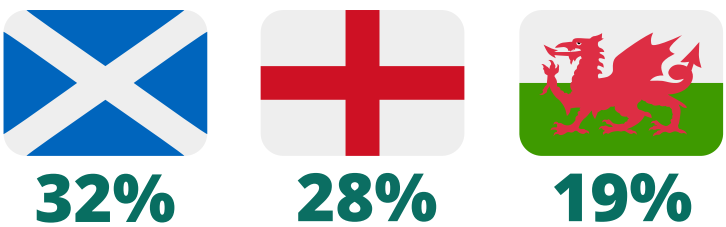


Semi-regular use most common amongst 35-44 year olds



Our 2022 results suggest that those alcohol drinkers aged between 35-44 are the most likely to be semi-regular low and no drinkers (35%) and regular drinkers (10%), followed by those aged 18-24 (31% and 7% respectively). Whilst a similar proportion of those aged 55 are regular low and no drinkers (7%), this age group is also the most likely to have never tried a low and no product (32%).

Scotland leads in terms of alcohol drinkers substituting with low and no with nearly a third (32%) semi-regularly drinking low and no products - a significant increase compared to 2021 (29%). This compares to 29% in England and 19% in Wales drinking low and no.



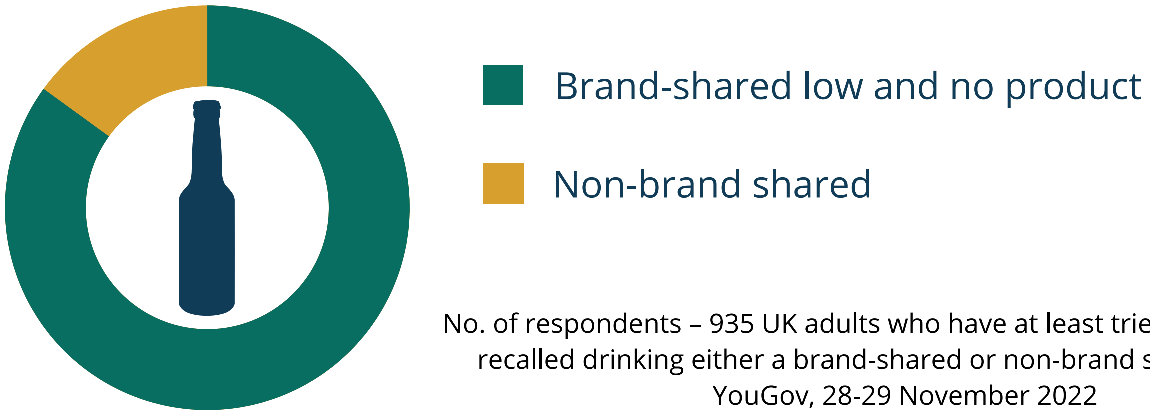
SURVEY RESULTS

Entry point into low and no category and current drinking pattern

For this year's survey we sought to understand how consumers first entered the alcohol alternatives category. Our research shows that by far most consumers who had ever tried a low and no product first entered the category through a product which shares branding with a regular strength alcohol product (i.e. above 1.2% ABV) – by this we mean a product such as Heineken 0.0, Guinness 0.0, Peroni 0.0, Thatchers Zero, Doom Bar Zero or Budweiser Zero. In contrast, examples of products independent of any shared alcohol branding include Seedlip, Ceders or Lucky Saint.

85%* of UK low and no drinkers entered the category through a brand-shared product, compared to 15% who tried low and no through a product independent of any alcohol branding. This is the same across both men and women and all age groups and across the UK.

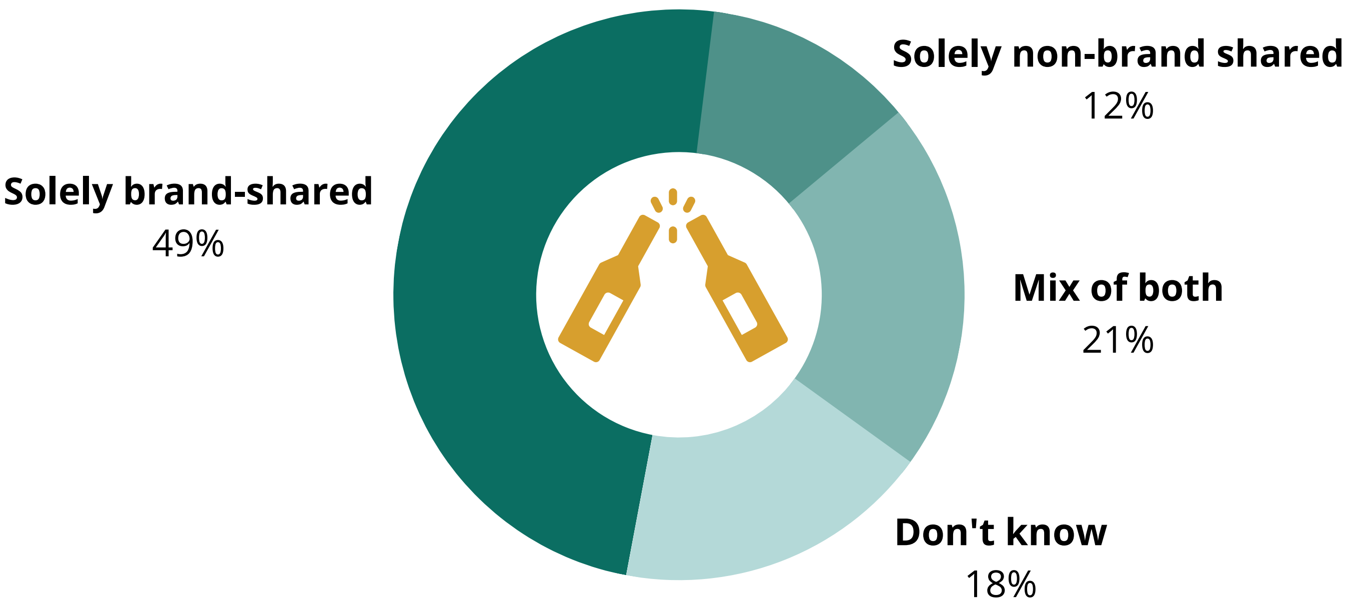
Brand-shared products are a key entry point for consumers



No. of respondents – 935 UK adults who have at least tried low and no and recalled drinking either a brand-shared or non-brand shared product
YouGov, 28-29 November 2022

Our results show that while consumers are most likely to start with a brand they know, they use this to try the full array of products. With half (49%) of current low and no consumers solely drink products which brand-share with alcohol brands, the other half of consumers are mixing it up. A third (33%) either solely drink independent products (12%) and 21% of people drink indies and brand shares.

Current low and no drinkers favour brand-shared products



No. of respondents – 1000 UK adults who are current low and no drinkers
YouGov, 28-29 November 2022

SURVEY RESULTS

Our research shows that a current preference for alcohol-brand shared low and no products extends across both men and women, and across all age groups.

That said, a significant proportion of younger low and no drinkers also favour independent, non-brand shared products. Close to a fifth (19%) of those aged 18-24 years old only drink products non-brand shared low and no products, whilst those aged 35-44 are most likely (25%) to drink a mixture of brand-shared and non-brand shared products.

These results may reflect the current state of the low and no market in the UK, where established brands have invested a significant amount of money and innovation into producing and marketing alcohol-free versions. This is highlighted in the use of high-profile sponsorship platforms, such as Heineken 0.0 and the UEFA Europa League and Budweiser Zero and the English Premier League, to encourage consumers to try low and no alcohol products. However, our results also show that a significant proportion of UK consumers are drinking products which do not share any alcohol branding, reflecting the growing number of independent low and no brands on the UK market.

SURVEY RESULTS

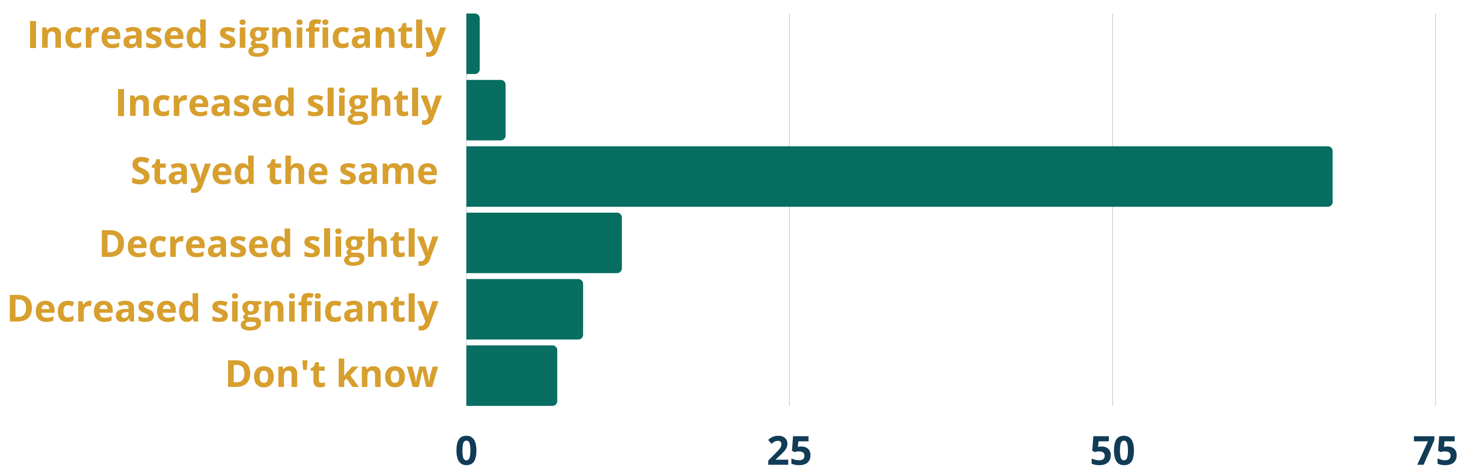
Over a fifth of those who have tried low and no have cut their alcohol consumption

In terms of impact on overall alcohol consumption, our survey is further evidence that low and no alcohol products are used as alcohol alternatives and aid moderation.

Over a fifth (21%)* of respondents who drank alcohol said that their subsequent weekly consumption has decreased since first trying a low and no alcohol alternative. Whilst this is lower than the 26% who said they had reduced their consumption in last year's survey, this continues to demonstrate that low and no are alcohol alternatives and are being used by consumers as part of moderation efforts.

In comparison, 67% of respondents said their weekly alcohol consumption had stayed the same (60% in 2020).

A fifth of alcohol drinkers have cut weekly consumption since first trying low and no



No of respondents - 1243, All UK adults who have at least tried low and no and previously drank alcohol
YouGov, 28-29 November 2022

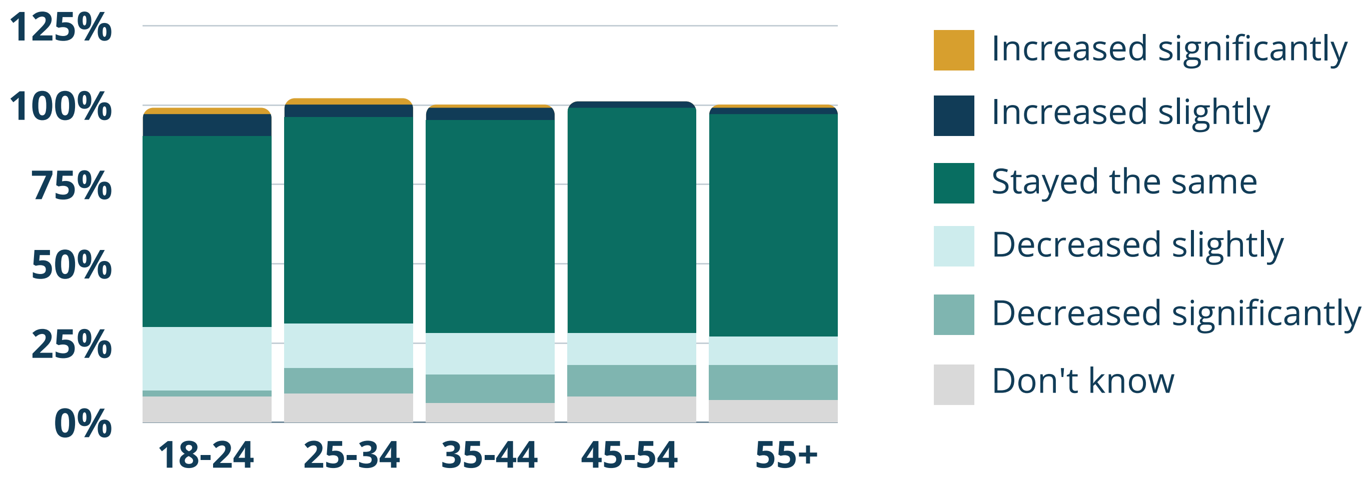
*Removing those who did not drink alcohol before first trying a low/no alternative.

SURVEY RESULTS

Men (22%) were slightly more likely than women (19%) to report decreased alcohol consumption.

Broadly a fifth of alcohol drinkers across all age groups reported decreased alcohol consumption, although decreased consumption was slightly higher (24%) amongst those aged either 18-24 or 35-44.

Broadly a fifth across all age groups have cut back since first trying low and no alcohol



No of respondents - 1229, Those who did not drink alcohol before first trying a low/no alternative, YouGov, 28-29 November 2022

Of Scottish drinkers have cut back their weekly alcohol consumption compared to 21% in England*.

*Statistics from Wales and Northern Ireland are unavailable due to smaller sampling.

Ingrained responsible drinking behaviours continue to drive the reasons to drink low and no alcohol alternatives

There has been a consistent long-term pattern of moderate drinking by the majority in the UK with close to 4 in 5 adults either not drinking or drinking within the Chief Medical Officer's low risk guidance, rising from 74% in 2011 to 79% in 2021 [2] . Our research shows that consumers appetite for low and no is drawn from these ingrained responsible drinking behaviours.

For the fifth year in a row the most popular specific reasons for drinking a low and no alcohol product are 'being able to drive home from social events' (37%) and socialising without drinking excessively (20%). It highlights a consistent preference amongst low and no drinkers for using these products to aid their responsible drinking goals.

Reducing the possibility of health concerns or current medical reasons were also cited by nearly a quarter (23%) of consumers – this incorporates those looking to reduce the possibility of short-term physical health problems (e.g. hangovers) (17%); reduce the possibility of long-term physical health problems (e.g. alcoholic liver disease) (15%), and those citing 'illness / medical reasons' (8%).

Whilst 12% explicitly stated they currently alternated low and no products with regular strength alcohol to moderate their overall consumption.

SURVEY RESULTS

Driving home and socialising without drinking excessively remain the main reasons consumers choose low and no

37%

Being able to drive home from social events

23%

Minimising possible health concerns or current medical reasons*

20%

Socialise without drinking excessively

12%

Alternating with regular strength drinks to moderate alcohol consumption

12%

Reduces possibility of poor judgement or acting impulsively

7%

To help take part in a temporary abstinence (e.g. Dry January)

5%

Pregnant/supporting pregnant partner

5%

It is cheaper

Other responses:

23% - No particular reason
5% - Other
3% - Prefer the taste
3% - Don't know
1% - Recovering from an alcohol dependency
1% - Religious reasons

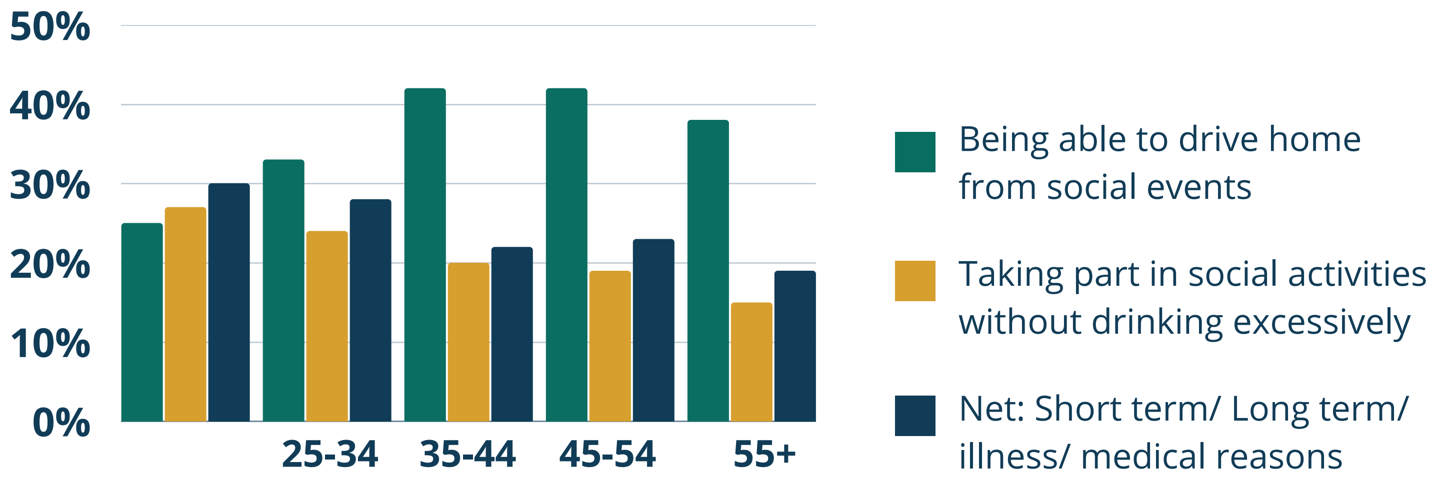
No. of respondents: 1497, all UK adults who have tried low and no alcohol, YouGov, 28-29 November 2022
. * incorporating respondents who cited short-term (17%) and long-term (15%) physical health problems; and 'illness / medical reasons' (8%).

SURVEY RESULTS

These reasons were also the most popular amongst both men and women, however the ability to drive home was cited by significantly more men compared to women (43% vs 32% respectively), whilst women were slightly more likely to cite socialising without drinking excessively (21% vs 19%). Women were also slightly more likely than men to cite health concerns or current medical reasons (23% vs 22%).

'Being able to drive home' followed by 'socialising without drinking excessively' are the most popular specific reasons amongst all age groups except those aged between 18-24, where the order of importance is reversed – this has been the case across the past five years. Whilst collectively health concerns or current medical reasons were also a significant concern across all age group, though most prevalent in those aged 18-24 (30%), followed closely by those aged 25-34 (28%).

All age groups value low and no enabling safer driving, responsible drinking and addressing health/medical concerns



No. of respondents: 1497, all UK adults who have tried low and no alcohol, YouGov, 28-29 November 2022

SURVEY RESULTS

‘Being able to drive home’ remails the most popular specific reason given across all UK nations. However, the second most popular reason varied significantly by nation: England, socialising without drinking excessively (20%); Scotland avoiding short-term physical health impacts such as hangovers (19%); Wales, jointly socialising without drinking excessively and avoiding long-term health issues (13%).

Being able to drive home	**39%**	**30%**	**32%**
Concerns around health and medical reasons	**23%**	**23%**	**14%**
Socialise without drinking excessively	**20%**	**16%**	**13%**

CONCLUSION

How do these results fit in to the wider picture of low and no market growth in the UK?

Our fifth annual survey looking at low and no alcohol alternatives continues to tell a positive story of how these products have become part of UK consumer buying habits. Five years of polling have given us a substantial data set to reflect and build conclusions on. It shows how these products are by and large bought by current alcohol drinkers, as a key tool for moderation and responsible drinking.

This is highlighted in repeated polling showing that low and no alcohol consumers highly value these products for enabling them to drive home safely from social events (helping to tackle the scourge of drink driving), as well as from drinking excessively (enabling consumers to moderate).

This theme is also shown in repeated polling showing that a significant proportion of alcohol drinkers have cut back their weekly alcohol consumption since first trying a low and no alcohol alternative.

CONCLUSION

Our findings are echoed in recent research published by the independent charity Drinkaware which found that “the use of alcohol-free/low alcohol drinks as a 'moderation technique' (things people do to moderate their drinking) of reducing by drinkers is increasing” [3]. It also found that “Some risky drinkers use alcohol-free/low alcohol as a tool to decrease their overall alcohol intake, particularly once they have decided that they are drinking too much alcohol.”

Whilst concerns have been raised surrounding the promotion of low and no alternatives which share branding with an alcoholic product above 1.2% ABV, our polling highlights the significant importance of these products as a key entry point to the category. As such, we believe attempts to restrict the promotion of brand-shared products could be counterproductive to moderation and harm-reduction efforts.

Furthermore, the promotion of the products remains targeted at adult consumers, with measures also voluntary in place across hospitality and retailers to prevent any sales to those under 18.

However, our polling does indicate consumer uptake of alcohol alternatives may be plateauing after years of rapid growth. We recognise that our polling may be an outlier, with sales predicted to continue to boom in the UK. Consumer research agency IWSR has predicted 7% annual volume growth of low and no alcohol in the UK from 2022 to 2026 [4]. We do intend to repeat our polling later in 2023 to continue to chart the latest development of the low and no trend.

Our polling could be the canary in the cage, and suggests that neither the industry nor the Government should take continued growth for granted. Now is the time to keep building the opportunity in the category and to support people with their responsible drinking goals.

CONCLUSION

We would urge greater awareness and availability of alcohol alternatives, especially in hospitality settings, would help ensure continued growth in the sector.

Another key step would be for the UK Government to launch the long-awaited consultation on low alcohol descriptors this year. The consultation would seek views on updating the terminology around the various ways in which products below 1.2% ABV are marketed – a key source of confusion for UK consumers. The consultation is also a chance for the UK to be brought in line with our Western European neighbours and deem products 0.5% ABV and below as ‘alcohol-free’. This would also be in line with the UK Licensing Act, which deems products 0.5%ABV and below to be non-alcoholic.

The Portman Group will continue to work with all of the sector - from producers, retailers, publicans and consumer groups - to help build connections and to provide consumers with greater awareness of low and no.

FOOTNOTES

1. Health Survey for England, December 2022 / Scottish Health Survey, November 2022/ National Survey for Wales, July 2022 / Health Survey Northern Ireland, December 2020

2. Health Survey for England, December 2022 / Scottish Health Survey, November 2022/ National Survey for Wales, July 2022 / Health Survey Northern Ireland, December 2020

3. Drinkaware: Alcohol-free and low alcohol drinks in the UK, July 2022

4. The Times: No alcohol? No problem, as sales boom in UK, January 2023

*When removing those who selected neither, assuming they cannot recall what first drew them to the low and no category.

Portman Group

Alcohol Responsibility + Marketing Regulation

YouGov

February 2023

To find out more contact comms@portmangroup.org.uk

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