

**“ARE WE LIVING
IN A POST-‘SOBER
CURIOUS’ WORLD,
OR DOES
SOCIAL JUDGEMENT
AROUND NON-
ALCOHOLIC DRINKS
STILL EXIST?”**

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1

Executive Summary



As an experimental psychologist interested in the multisensory world of food and drink (see Spence, 2017a; Spence & Piqueras-Fiszman, 2014, for a couple of my prize-winning books on the subject), I have long been fascinated by our changing relationship with various foods, drinks, tastes, and flavours. I have spent much of the last decade studying and identifying some of the key factors and trends that lie behind these changes in food and beverage behaviour, and in this latest study, I focus on people’s behaviour specifically around alcoholic and non-alcoholic beverages.

This anthropological study surveyed 11,842 people between 18-75 years of age across five nations: the UK, USA, Spain, Japan and Brazil¹ (18-65 years of age). It is important to recognise that although this research calls out the country average where there appears to be a ‘global’ trend, there are also some intriguing national differences which I explore. Bear in mind also the fact that we are looking at the patterns of consumption in five relatively developed countries, where there is, in general, a more progressive culture around non-alcoholic beverages. With that proviso in mind, let’s touch on the broader cultural context, and then delve into what the data reveals about contemporary attitudes and behaviours around low and non-alcoholic versions of alcoholic drinks.

¹ Base sizes for each market and sub sample below:

Base	All markets	UK	Spain	USA	Japan	Brazil (18-65yrs)	All markets Gen Z (legal drinking age-26 yrs)	All markets Gen Z (legal drinking age-26 yrs) men
All adults (legal drinking age-75 – BR 18-65)	11,842	2465	2355	2413	2376	2233	2908	1,397
All adults aged legal drinking age-75 (BR 18-65) who have consumed low or no alcohol drinks at least once/twice in last year	6,608	1,215	1,813	926	1,103	1,551	1,788	892

After millennia of humanity exploring alcohol's diverse role in society, there is no doubt that the past few years people have been more curious about moderating alcohol consumption through their drink choice. The evolution of alcohol has reached a point where, not only is there now a plethora of alcoholic beverage choices available for any occasion, but such progress has been made that non-alcoholic versions of these drinks are now commonplace, especially in more developed countries.

Whether 'sober curious'² or living a 'damp lifestyle',³ my view is this new research shows people have become more confident in finding the balance that suits them rather than following historical, cultural, and social norms around drinks. The social scales have teetered from the thoughtless drinking habits of the past to an increase in abstinence. But now it seems that we have entered the early stages of a cultural shift to truly thoughtful consumption, where people are living their lives confident in their own choice of drinks (rather than following the crowd, as was the case formerly) and striving for a lifestyle that is more balanced.

The present study reveals that, for many of those surveyed, the acceptability of low and no-alcohol drinks is higher than it was five years ago.⁴ Most people (68%) in these relatively developed countries surveyed have now tried low or non-alcohol versions of alcohol (Highest with Gen Z⁵ at 73% vs. 58% of Boomers),⁶ and people report that they are getting positive reactions from friends and family for their NAB (non-alcoholic beverage) choices (most notable amongst Gen Z, of whom 34% reported positive reactions).⁷

Not only are non-alcoholic drinkers starting to be more accepted, but people increasingly acknowledge them as "cool" and "respectable" rather than "uncool" or "boring".⁸ This acceptability and change in attitude are also reflected in a rise of dry dating (among those who drink low or no alcoholic versions of alcoholic drinks, over a third of people consume low

² [Ruby Warrington](#), 31st Dec 2018.

³ [Hana Elson](#), November 2022.

⁴ Over 80% of those surveyed (across all markets) believe that drinking low or no alcohol options is more acceptable (49%) compared to 5 years ago, with a further 34% answering "it's the same" (compared to 5 years ago)..

⁵ Gen Z over the legal drinking age per market (18-26 years old in the UK, 18-26 years old in Spain, 18-26 years old in Brazil, 20-26 years old in Japan, and 21-26 years old in USA)

⁶ Across all of the markets surveyed, 73% of Gen Z respondents surveyed have tried no/lo alcoholic beverages vs. only 58% of Boomers surveyed.

⁷ Across all of the markets surveyed, 21-37% of adults who have consumed low or no alcohol drinks in the last year said they had experienced either "positive support on my choice of drink" or "Other positive reaction..." from their family, friends and colleagues. (In the USA (37%), in Brazil (32%), in Japan (25%), in the UK (24%), and in Spain (21)).

⁸ Across all of the markets surveyed, 9% of those surveyed associated non-alcoholic drinkers with being 'cool', and 25% with being 'respectable', as compared to 4% 'uncool' and 6% 'boring'.

or no alcohol beverages whilst on an evening date)⁹ as well as in the fact that a fifth of drinkers of low or no alcohol now say they moderate between alcoholic and non-alcoholic beverages at evening social gatherings with friends or family.¹⁰ People are notably showing self-assurance and balance in this area of their lives. As one might expect, people favour alcohol at social events in the evening and fizzy drinks at social events in the daytime. Interestingly, however, the proportion of people who are choosing to drink low or no alcohol at social gatherings in the evening and the daytime doesn't change, suggesting it holds a unique role that stretches across occasions.¹¹

While people might well be showing a higher acceptance of low and no-alcohol options, just how accepted are they really? The data shows a curious gap between what the public say and what they do in this space. For instance, 14%¹² said that they always seem to end up drinking alcohol at social occasions despite intending to drink low or no-alcohol drinks, rising to 51% when including those who said they 'sometimes' change their minds in these social settings.

The reason for this could be attributed to the ongoing presence of stereotypes and stigmas levelled at non-alcoholic drinkers in relatively developed countries. The results of the study surprisingly show the social pressures in this space are most notably felt by Gen Z, the generation who are arguably most familiar with NAB options. It shows over 1/3 of Gen Zers have felt pressure to drink alcohol in certain social situations (the highest of any generation surveyed),¹³ and 21% of Gen Z have been called-out about their choice of a non-alcoholic drink (as compared to the 15% generational average).¹⁴

Gen Z, most notably young men, are strongly influenced by social perceptions when it comes to their drinks choices. 38%¹⁵ of Gen Z men are willing to drink low or no-alcohol drinks if their

9 Across all markets surveyed, 35% of those who have consumed low or no alcohol drinks at least once/twice in last year consume non-alcoholic beverages whilst on an evening date.

10 20% of those who have consumed low or no alcohol drinks at least once/twice in last year said both "Alcoholic drinks" and "Low or no alcohol versions of alcoholic drinks" when asked what they drink at evening social gatherings with friends, family. Across 12 types of occasion presented to respondents, the proportions saying both of these responses ranged from 7% to 20%.

11 Across all markets, 45% of respondents who have consumed low or no alcohol drinks at least once/twice in last year drink alcoholic drinks at daytime social gatherings with friends, family vs. 54% at evening social gatherings; 56% drink soft drinks at social gatherings in the daytime vs. 47% at evening gatherings. The proportions for no/low alcoholic drinks at daytime and evening gatherings is 38% and 39% respectively.

12 Across all markets surveyed, 14% answered 'always' and 37% answered 'sometimes' to the question 'At social occasions and assuming there is nothing preventing you from drinking an alcoholic drink (e.g., you are not driving, etc.), how often, if at all, have you arrived intending on drinking a low or no-alcohol drink and ended up drinking alcoholic drinks instead?'

13 Across all markets surveyed, Gen Z are the most likely generation agree with the statement "I have felt pressure to drink alcoholic drinks in some circumstances" (36%), compared to only 13% of Boomers

14 21% of Gen Z selected "Mild teasing or jokes on my choice of drink" when asked "Which, if any, of the following reactions have you had from family, friends or colleagues when you are drinking low or no alcohol versions of alcoholic drinks?", compared to an overall generational average of 15%.

15 Across all markets surveyed, 26% of people would drink low or no alcohol versions of alcoholic drinks if my friends also drank them, rising to 36% of Gen Z (38% of Gen Z males vs. 35% of Gen Z females).

friends do, but they are also more likely to feel the need to justify their choice (30%)¹⁶ and to feel like outsiders when opting for low or no-alcohol options (29%).¹⁷ It seems these concerns are the reason why younger generations aren't leaning into the low and no-alcohol trend as much as they say or want to do.

Seeing these social pressures come to the fore in the developed countries surveyed, I believe there is no doubt that people will feel even more stigmatised for opting-out from alcoholic options in other cultures where drinking alcohol is still predominantly viewed as the social norm. It's clear that the evolution of NAB has reached a tipping point, thanks to wider availability and a more common acceptance of low and no-alcohol drinks in the countries surveyed. In time, this balance will likely show up in wider developing NAB cultures. Adoption of the latest 0.0 products is sure to make its way across borders, and as acceptance of moderation in these developing countries increases, barriers to the growth of the non-alcoholic beverage category will gradually dissolve.

16 Across all markets surveyed, 18% agreed with the statement "I feel the need to explain and justify my choice of drink, when or if I chose to drink a low or no alcohol version of an alcoholic drink at a social occasion", rising to 27% for Gen Z and 30% for Gen Z males (highest when compared to other genders and generations surveyed).

17 Across all of the markets, 17% of those surveyed agreed with the statement "I have felt like an outsider drinking low or no alcohol versions of alcoholic drinks in a situation where others are drinking alcoholic drinks", rising to 26% for Gen Z and 29% for Gen Z males (highest when compared to other genders and generations surveyed).

ARE WE LIVING IN A POST- 'SOBER CURIOUS' WORLD, OR DOES NON-ALCOHOLIC DRINKS JUDGEMENT STILL EXIST?

by Professor Charles Spence, University of Oxford



OVER 1/3 OF GEN ZERS*

have felt pressure to drink alcoholic drinks in some social situations



21% OF GEN Z*

have been called out** on their choice of a low or non-alcoholic version of alcohol



51% OF PEOPLE

have ended up drinking alcohol at social occasions when they said they wouldn't

Among drinkers of low/non-alcoholic versions of alcohol

OVER A 1/3

WOULD CHOOSE A NON-ALCOHOLIC VERSION WHEN ON AN EVENING DATE



More people acknowledge non-alcoholic drinkers as "cool" rather than "uncool" or "boring"

"UNCOOL"

"BORING"

"COOL"

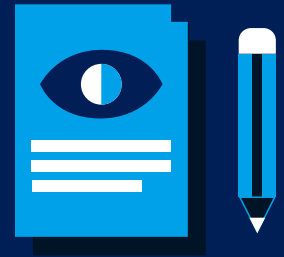
*Gen Z of drinking age: aged 18+ in UK, Spain and Brazil, 20+ in Japan and 21+ in USA

**Participants who received mild teasing or jokes on their drinks choice

Technical note: Online by Ipsos UK on behalf of Heineken. 11,842 adults across UK, USA, Spain, Japan and Brazil aged 18-75 (18-65 in Brazil). 16th - 30th August 2024. Adults 18-75 (18-65 in Brazil) n=11,842, Gen Z n=2908, drink alcohol once/twice a year or more n=9241, drink low or no alcoholic versions of alcoholic drinks once/twice year or more n=6608.

2

Introduction



Within my role as an experimental psychologist, I am interested in trying to identify some of the key factors and trends that lie behind changes in food and beverage behaviour. That is, I want to understand more about why it is that particular foods and drinks come into, or fall out of, favour as the years, decades, and even centuries go by (e.g., Spence, 2023). The answer, as it turns out, rarely has much to do with flavour (see Spence, 2024a). At the same time, however, I also want to figure out how we can help nudge people towards more sustainable and healthy new (or alternative) food sources, be it entomophagy (eating insects; e.g., Deroy, Reade, & Spence, 2015; Motoki, Park, Spence, & Velasco, 2022; Park, Motoki, Velasco, & Spence, 2022; Youssef & Spence, 2021), eating more weeds and flowers (see Rodrigues & Spence, 2023; Spence & Spence, 2023), or consuming low or no alcohol versions of alcoholic drinks (Betancur, Motoki, Spence, & Velasco, 2020).

Given that current patterns of consumption are unsustainable, it is becoming increasingly apparent that we need to figure out how to shift to a more sustainable diet, one that is better for us as individuals, as well as for the planet that we all inhabit (see Willett, Rockström, Loken, Springmann, Lang, Vermeulen, et al., 2019). Indeed, nowadays many people are already starting to think more carefully than ever before about what they choose to put into their bodies. At the same time, however, the customs and rituals that exist around food and drink can sometimes make it hard for us to change our behaviour, even when we want to try something different (Spence, 2021c).

Contextual factors (such as the atmosphere, see Spence, 2020, for a review) as well as social trends play a surprisingly important role in determining what we choose to eat and drink, not to mention how much we enjoy the experience (Spence, 2018). It turns out that everything from the time of day through to the time of the week (e.g., weekday vs. weekend) or year (e.g., think 'Dry January' vs. Christmas; Spence, 2021a, b), not to mention global events such as the Covid pandemic (see Velasco, Motoki, & Spence, 2022) affect our food and drink choices, as well as our perception and enjoyment of specific taste/flavour experiences. I have spent

much of the last decade studying how everything from the glassware through to background music affects people's behaviour around, as well as their perception of, both alcoholic and non-alcoholic beverages, including beer. However, it is important to recognize the emotional component to eating and drinking (i.e., as in the notion of comfort food; Spence, 2017b), as well as the importance of the more ritualistic aspects that are sometimes associated with the consumption of our favourite food and drink (see Spence, 2021b, for a review).

In this Heineken-Ipsos Survey, the focus is on the current state of the market for low and no alcohol beer (NAB; cf. Betancur et al., 2020). Some of the questions to be addressed concern when, where, and with whom people today choose to drink such beverages. What are the current barriers, as well as the emerging opportunities and occasions, for the consumption of NAB in different countries and amongst different generational cohorts around the world.

1.1. History of the alcoholic and NAB market

People have been both making and consuming alcoholic and non-alcoholic drinks for thousands of years (see Hanson, 2013; Standage, 2007, for reviews). However, it is only recently that we have seriously started to try to replicate the flavour of our alcoholic drinks in non-alcoholic form (see Jackowski & Trusek, 2018, for a review). While there has been growth in the low and no-alcoholic beverage market for wines, spirits, and beers, it is the latter that is, in some sense the most interesting (Anon., 2021), given that beer has long been one of the world's most popular alcoholic beverages. In fact, according to Mason (2023), beer is *the* most consumed alcoholic beverage in the world. More striking still, after water and tea, beer is the third most popular drink in the world.

To put these figures into some kind of perspective, in the 2022 brewing year, the global production of beer increased slightly year-on-year by 1.3% to 1.89 billion hectolitres. That said, this figure was still a little below the pre-pandemic levels. In 2019, production peaked at 1.91 billion hectolitres. Nevertheless, the global market for beer (US\$794 billion in 2022) is almost twice as big as that for wine, which was the second most popular global alcoholic beverage (US\$442 billion in 2022; all figures from Mason, 2023). According to Mason, some of the key trends in the market for beer currently include the overall demand for premium and low-calorie beers, the rising popularity of craft beer, and the continued expansion of distribution networks in emerging regions which are all expected to help drive global growth sales of beer in the coming years (see also Bellut, Lynch, & Arendt, 2021; Yu, Liu, Qin, Zhou, Zhao, Zhang, & Mao, 2024).

It is, however, important to recognize that such global statistics can hide markedly different national trends that may paint a very different picture of the drivers and barriers to growth in the market for NAB in specific countries. In the UK, it was recently reported that: “*Brits now drink most of our alcohol in wine NOT beer*” (Morton, 2024; see also Aizenman & Brooks, 2008).¹⁸ One might, perhaps, not be so surprised by such headlines appearing in Great Britain or France, but different patterns of consumption are likely to be at play in other countries (e.g., such as Japan or Brazil where wine is far less popular). Relevant here, it is interesting to consider the changing motivations that people have for drinking beer, which includes everything from its role as a thirst-quenching drink (at least traditionally; e.g., Guinard, Souchart, Picot, Rogeaux, & Siefferman, 1998), through to the beverage’s role as a social lubricant. Celebrity, and increasingly social media, endorsement also play an increasingly important role too (remember George Clooney’s role in driving capsule coffee consumption; cf. Park et al., 2022).

The last decade or so has seen rapid growth in the market for NAB around the world (Mason, 2023). The global non-alcoholic beer market is currently worth \$13.7 Billion, and accounts for 1.7% of global beer volume¹⁹. As in many other areas, however, reports from people suggesting that they want to try non-alcoholic versions of alcoholic drinks doesn’t necessarily always translate into increased sales. Currently, over the past five years global NAB volume has grown at a compound annual growth rate (CAGR) of 4.8%²⁰. The traditional alcoholic beer market is therefore being challenged from a couple of directions, as each country sees their own cultural shift in preference for a certain type of alcohol (for example wine to beer, or beer to spirits) and from what I have ascertained from this study, the NAB category shows a gap between what the public say and what they do in this space – often wanting to enjoy an alcohol-free drinking experience but, for potential reasons to be discussed in this report, changing their mind.

¹⁸ It is interesting to consider how much of this shift is related to the perceived health benefits that may be associated with the consumption of red wine (e.g., due to the presence of polyphenols; see Petit, Wang, & Spence, 2022, 2024; Spector, 2024; Yoo, Saliba, & Prenzler, 2010).

¹⁹ Global Data 2023

²⁰ Global Data 2018-2023

1.2. What are the psychological barriers to NAB consumption?

What might the barriers, psychological and otherwise, be that are preventing people from doing what so many of them say that they want to do, namely try to shift more to NAB? One group of issues that has been identified by researchers concerns **price** and **availability**. In the past, the public in certain countries have complained about a lack of **choice** (of brands) not to mention a lack of availability of NAB. However, given the growing number of companies now operating in the space, a lack of **availability/choice** is becoming much less of an issue as time goes by. Intriguingly, the latest research shows that increased availability of draft non-alcoholic beer in UK pubs led to an 29% increase in sales (Clarke, Blackwell, Ferrar, De-Loyde, Pilling, Munafò, Marteau, & Hollands, 2023). Others, meanwhile, consider the price (relative to traditional alcoholic beer) to be too high to encourage their switching. At the same time, however, some people report that they do not believe that NAB tastes as good as the alcoholic equivalent. As such, **low taste expectations** might also be acting as a barrier to switching. A third issue that has been identified relates to the **social stigma** that some groups of people feel when choosing to drink NAB in the presence of their peers.

The last few years have seen a rise in what has been described as ‘sober curiosity’ (Lunnay et al., 2022; Roberts, 2024), and a noticeable reduction in social stigma and peer pressure around consuming alcohol. Gen-Z, in particular, drink less alcohol than older generations (e.g., Khosla, 2024). One of the key findings to emerge from the anthropological study reported here concerns the reduction in social stigma that many people nowadays feel in relation to drinking NAB.²¹ There are several possible reasons for this change. It might reflect the diversification of social personas through the acceptance of people choosing how they want to identify. That is, it could be seen as reflecting the transition from conformity to individuality, and a growing recognition of, as well as confidence in asserting one’s individuality through taste (and the food and drink choices we make; on taste personality, see Golestanbagh, Miraghajani, Amani, Symonds, Neamatpour, & Haghizadeh, 2021; Spence, 2022, on the link between personality and taste preferences). This, in turn, may lead to a growth in the personalization of taste experiences, and hence a growing curiosity about, as well as an acceptance of, NAB.

²¹ See “Non-alcoholic beer sheds its stigma.” **September 15th**, 2017. <https://www.mintel.com/press-centre/non-alcoholic-beer-sheds-its-stigma/>.

1.3. Heineken-IPSOS multi-country 0.0 Anthropological Study Survey

Given this backdrop of a global market for NAB that is growing rapidly, perhaps not quite at the pace that was expected, the purpose behind conducting the Heineken-Ipsos multi-country anthropological study was to ascertain people's current attitudes to NAB in five relatively developed NAB regions (Japan, USA, the UK, Spain, and Brazil).²² The aim was to explore the current barriers and national opportunities to increasing the consumption of NAB, and to see how they may have changed over the last few years. Importantly, by segmenting the countries in terms of generational cohort (specifically, Gen Z, Millennials, Gen X, and Boomers),²³ this research helps to highlight generational, gender, and geographical similarities and differences in the patterns of consumption, as well as current barriers to increased uptake in the NAB category.

What comes out clearly from this new largescale multi-country anthropological survey is that there isn't any one specific reason why people nowadays choose to drink low or no alcohol versions of beer, even if it is a special occasion, for that matter!²⁴ It's increasingly just a matter of taste. Taken together, the results of the Heineken-Ipsos NAB report highlights how a growing number of people across the different demographic cohorts now report that they have the confidence to try NAB in a range of quality social occasions. The results of the survey provide information from five countries concerning the changing patterns and occasions of consumption. Detailed summary statistics are presented in the following sections of the report.

22 Technical Note: The research was carried out by Ipsos UK on behalf of Edelman. Ipsos UK interviewed a representative quota sample of 11,842 adults using its online omnibus, including a boost sample of 1483 Gen Zs. Fieldwork was carried out in five markets, including the UK, USA, Spain, Japan, and Brazil. The sample achieved is representative of the population aged 18-75 years in all markets except for Brazil, where the participants were aged 18-65 years. Interlocking quotas were set on age within gender, and on region and working status. The data has been weighted to the known offline population proportions for interlocking cells of gender within age and working status, as well as region and education (in UK, USA, Spain, Brazil), social grade (UK only) and income (USA only) to reflect the adult population of each market. Fieldwork was carried out between the 16-30th August, 2024. Data collection was managed by Ipsos, with analysis and interpretation of results by Prof. Charles Spence.

23 For reference, Gen Z refers to those in the 18-26 yrs range, Millennials to those who are 27-42 yrs old, Gen X to those, like myself, in the 43-56 yrs age range, and Boomers to those in the 57-75 yrs (57-65 yrs in Brazil) age range.

24 Back in 2016, much of the marketing (at least at Heineken) was around the strapline "Now you can" (e.g., enjoy) beer in non-beer moments (see also French, 2018).

3

Transnational Trends



Note that for each statistic, the transnational averages are typically provided first (All), followed by the figures for each generational cohort (Z – Generation Z; M – Millennial; X – Generation X; and B – Boomer) and where relevant, nation and gender comparisons.

Increased Acceptability of NAB

Throughout the five nations surveyed, it's clear that the overall acceptability of low or no-alcohol versions of alcoholic drinks has increased in recent years, with this trend being especially evident amongst the younger generations.²⁵ Highest acceptability currently is seen in the UK (63%) whereas the lowest acceptability currently can be seen in Japan (41%). In general, across the board, women feel this increased acceptance more than men.²⁶



This wider acceptance could stem from a culmination of factors in recent years as people's drinking habits have changed. Historically, we saw a marked shift towards people cutting out alcohol entirely, which is now increasingly balancing out as people are more mindful and moderate to what they drink. With an increased confidence in people choosing NAB options (non-alcoholic beverage), higher demand has

²⁵ Question: 'If you were to drink low or no alcohol versions of alcoholic drinks with people you know, do you think it is more acceptable or less acceptable now compared to 5 years ago, or do you think it is the same?' (Net: Much /Little more acceptable: All 49%). Acceptance significantly higher amongst Gen Z and Millennials (Z52%*; M53%*; X48%; B44%). Base: All adults aged 18-75 yrs.

²⁶ Question: 'If you were to drink low or no alcohol versions of alcoholic drinks with people you know, do you think it is more acceptable or less acceptable now compared to 5 years ago, or do you think it is the same?' Base: all adults aged 18-75 years old (ZM51% ZF53%; MM55% MF52%; XM48% XF47%; BM41% BF46%)

led to the social stigma starting to decrease. This increase in demand in recent years has led to a surge in innovation in the non-alcoholic space that has subsequently broadened availability in those places that historically only served alcohol (pubs, bars, shops and social gatherings), making it more visible throughout society.

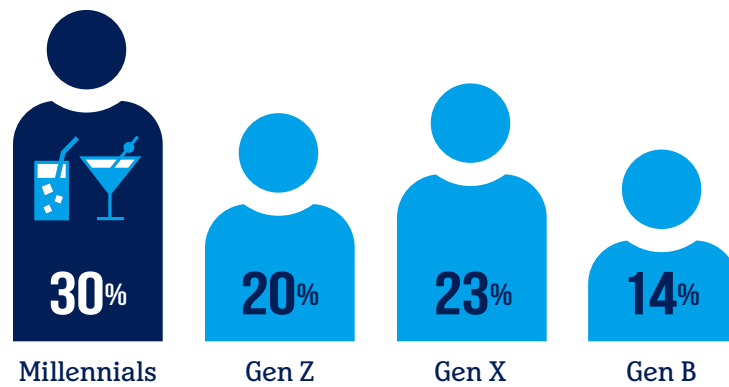
The latest research suggests that the widespread availability of low and no alcohol options, especially in the hospitality sector, is having a marked positive influence on the increased consumption of low and no-alcohol versions of alcoholic drinks. The enhanced taste profile of low and no alcohol alternatives to alcoholic drinks, such as beer, especially when paired with increased availability, means that people can choose to moderate their alcohol consumption in order to optimize their performance in other aspects of their everyday lives. Indeed, I believe the survey found people are starting to personalize their drinking profiles, balancing the different elements of their lifestyles in an increasingly health-motivated, and performance-driven, way.

Moving to Moderation

This study suggests that there is now widespread adoption of low and no-alcohol versions of alcoholic drinks, with 68% of those surveyed having tried these drinks. Millennials and Gen Z lead the way in both trial (75% and 73%) and frequent consumption, especially amongst males of both generations²⁷.

As has been mentioned already, it seems society has moved on from the all or nothing approach when it comes to drinks choices. 38% of people consume low or no alcohol versions of alcoholic drinks at social gatherings, suggesting they are moderating their alcohol consumption and factoring in a balance of alternatives to alcoholic beverages. Millennials are significantly more likely to drink both alcoholic and low and no-alcohol versions of alcoholic drinks than any other generational cohort – 30% responding that they drink both drinks at least once a week (compared to Z20%; X23%; B14%) and 47% of Millennials saying they drink both drinks at least once a month (compared to Z43%; X39%; B26%).

²⁷ Question: 'How often, if at all, do you personally drink the following types of drinks? Please consider all occasions you may drink them i.e. at home or outside home. Low or no alcohol versions of alcoholic drinks (e.g. low or no alcohol beer, cider, wine, spirits, etc.)' (ZM74%, ZF72%; MM78%, MF73%)
Base: all adults aged 18-75 years old

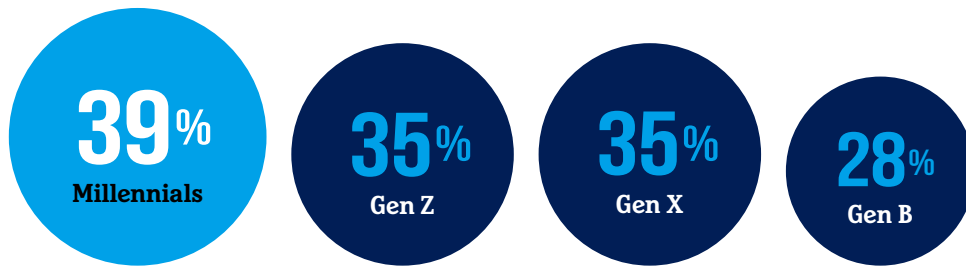


Likely to drink both alcoholic and low and no-alcohol versions of alcoholic drinks

The switch from an all-or-none approach to low and no alcohol versions of alcoholic drinks is an interesting development that emerges from the five nation survey. This trend is likely being facilitated by the enhanced taste of low and no alcohol versions of alcoholic drinks in recent years. The positive experience of the growing number of those who have tried 0.0 beers recently, both in terms of taste, and in terms of the positive response of others, means that a number of the traditional barriers individual taste/drink choice are starting to evaporate.

0.0 as the Confident Choice: Dating, Socialising and the Workplace

Millennials who consume low/no alcohol drinks appear to be the most 0.0 confident generation when it comes to weekend nights out with friends, with four in ten Millennials (40%) saying in this social situation they drink low or no-alcohol versions of alcoholic drinks (compared to Z33%; X33%; B33%). Their confident stance on 'dry' social situations extends as far as dating too. Of those Millennials who drink low and no alcohol versions of alcoholic drinks, they are significantly more likely to order a drink from the low and no category on a date than other age groups: 39% have picked one on an evening date (compared to Z35%; X35%; B28%) and 11% on a day date (compared to Z6%; X8%; B5%). Over a third of the UK (44%), Spain (41%) and Brazil (42%) Millennials have chosen no or low or no alcohol options on an evening date.



Group more likely to order a drink from the low and no category on an evening date

This is likely linked to people seeing 0.0 options as the confident choice, and so in turn, when they want to impress a date, they pick a low or no-alcohol version of an alcoholic drink to show themselves as ‘well put together’. Indeed, the five nation study found that participants acknowledge non-alcoholic drinkers as “cool” (9%) and “respectable” (25%) rather than “uncool” (4%) or “boring” (6%).

A concern about productivity also comes to the fore in the choice of no and low-alcohol versions of alcoholic drinks, with more than a third of those quizzed (32%) opting for non-alcoholic drinks during the evening, or night before an important engagement the next day²⁸. Gen X males and Gen Z females are significantly more likely to drink low or no-alcohol beverages than their counterparts at these moments.²⁹ This is most notable in the UK (40%), Japan (39%), and the USA (35%). It’s interesting to see how this juxtaposes with the two nations least likely to choose NAB options on an evening date, namely Japan and the USA. Perhaps people in Japan and the USA still see non-alcoholic beverages in a more performance enhancing way for professional prowess, possibly linking to their well-known work ethic (Spence, 2021d).

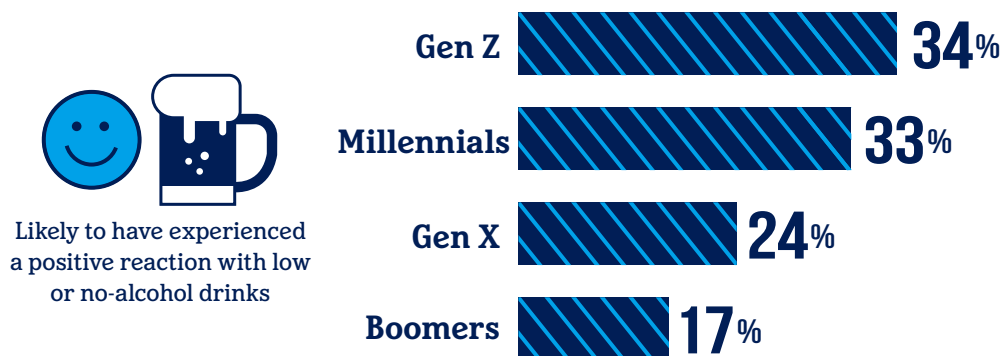
It is interesting to see how people, especially the younger generations, are increasingly confident in their choice of a low or no alcohol version of alcoholic drinks. The fact that this category is increasingly being chosen on date nights, and prior to important engagements (e.g., work), hints at growing confidence amongst people both about choosing 0.0 options but also about managing their drink choices to optimize their lifestyle.

²⁸ Across all markets surveyed, 35% of those who have consumed low or no alcohol drinks at least once/twice in last year (n=6,608) selected “The evening/night before an important engagement the next day” when asked “During which, if any, of the following times or periods are you more likely to opt for a low or no alcohol version of an alcoholic drink as an alternative to an alcoholic drink?”

²⁹ The evening/night before an important engagement, Gen Z females are significantly more likely to drink low or no alcohol beverages than their male counterparts (ZM26%/ZF34%*). This pattern is reversed for Gen X (XM37%/XF30%*). Base: All adults aged 18-75 yrs who have had low or no alcohol drinks once/twice in last year or more

Positive Reactions

Across all countries surveyed, almost a third (27%) of adults who have consumed low or no-alcohol drinks in the last year said their family, friends and colleagues had a positive reaction³⁰. This was most notable in the USA (37%) and Brazil (32%), with Spanish people least likely to receive a positive reaction (21%). Amongst generations, Gen Z and Millennials are more likely than older cohorts to have experienced a positive reaction (34% and 33% respectively, compared to only 24% of Gen X and a low 17% of Boomers). This mirrors the fact that younger generations are more likely to be influenced by seeing others drinking non-alcoholic drinks, and by what they see on social media, than are the older generations.



The Good Influence of Social Media

Social media and reality TV is clearly normalising drinking low or no-alcohol versions of alcoholic drinks (on average 29% of people agree) and encourages people to be more health conscious (on average 38% of respondents agreed). This is felt strongest by younger generations who use these platforms more regularly. Almost half of Gen Z (48%) agree they prefer to follow individuals on social media with a healthy lifestyle, although they get a balanced and moderated view of drinking on social media, as 60% of Gen Z say they see a lot of people having fun drinking alcoholic drinks at parties and events.

³⁰ Selected either or both “Positive support on my choice of drink” or “Other positive reaction from family or friends” when asked “Which, if any, of the following reactions have you had from family, friends or colleagues when you are drinking low or no alcohol versions of alcoholic drinks?”

On average
29%
**OF PEOPLE
AGREE THAT**



Social media and reality TV is clearly normalising drinking low or no-alcohol versions of alcoholic drinks.

While social media and reality TV are often portrayed as exerting a negative influence on younger people, the results of the five-nation survey suggest that there can also be positive role models in no alcohol social gatherings, and an appeal toward those living a healthy lifestyle.

Social Conformity as a Barrier to NAB Acceptance

Among those who drink alcohol at least once or twice a year, half of those participants quizzed (51%) said that at social occasions they always or sometimes seem to end up drinking alcohol despite intending to drink low or no-alcohol drinks (14% answered 'Always' and 37% answered 'Sometimes'). This happens more often amongst Gen Z and Millennials³¹ than older generations, and is most likely amongst men than women (across all age groups)³². Such behaviour hints at the historic role of alcohol in connection to celebratory traditions and rituals, and suggests social conformity at a vast array of social moments (ranging from visiting friends and parties to having people around to your home).

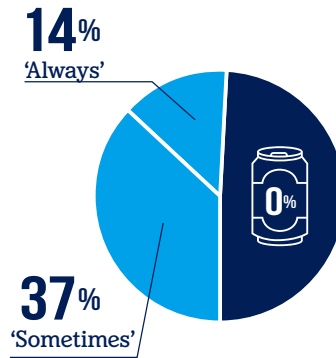
31 Question: 'At social occasions (e.g., visiting friends, having people around to your home, going to restaurants, pubs and bars, parties, BBQs, etc.) and assuming there is nothing preventing you from drinking an alcoholic drink (e.g., you are not driving, etc.), how often, if at all, have you arrived intending on drinking a low or non-alcoholic drink and ended up drinking alcoholic drinks instead?' (% All responding 'Always', 14%; 'Sometimes' 37%). This happens more often amongst Gen Z and Millennials than older generations ('Always', Z15%*; M16%*; X13%; B11%) ('Sometimes' Z45%*; M44%*; X35%; B26%) Base: All adults aged 18-75 who drink alcohol once/twice a year or more (n=9,241)

32 Question: 'At social occasions (e.g., visiting friends, having people around to your home, going to restaurants, pubs and bars, parties, BBQs, etc.) and assuming there is nothing preventing you from drinking an alcoholic drink (e.g., you are not driving, etc.), how often, if at all, have you arrived intending on drinking a low or non-alcoholic drink and ended up drinking alcoholic drinks instead?' (ZM18%/ZF13%*; MM18%/MF15%*; XM16%/XF10%*; BM15%/BF7%*) Base: All adults aged 18-75 who drink alcohol once/twice a year or more

51%



have ended up drinking alcohol at social occasions when they said they wouldn't

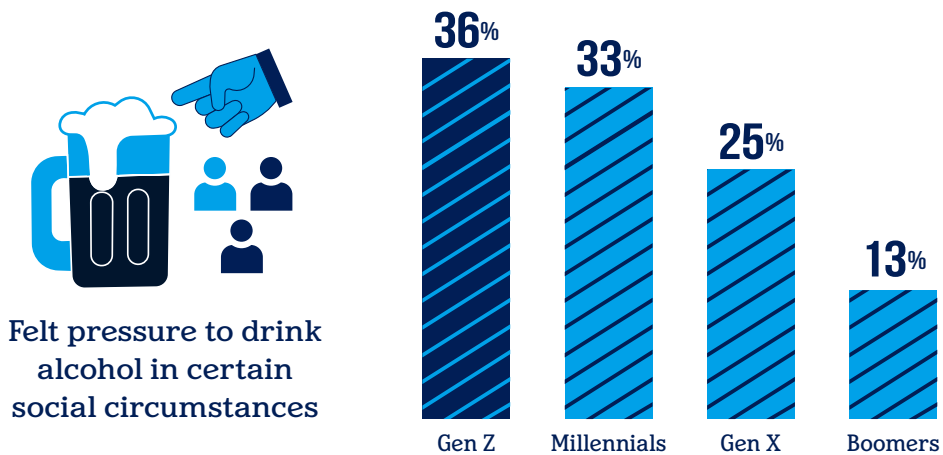


This social conformity is most strongly felt by younger generations (Gen Z and Millennials) than older cohorts (Gen X & Boomers). 26% of people agree they would drink low or no-alcohol versions of alcoholic drinks if their friends also drank them, which increases significantly amongst Gen Z (36%) and Millennials (34%). These two youngest generation groups also show highest concern about what others think of their choice of drink when at social gatherings or parties (Z24%; M21%; X12%; B5%), thus showing they are the most influenced by what their friends are drinking, and care most about what their peers think of their lifestyle choices.

These results reflect the generational differences that have attracted a lot of attention from cultural commentators.

Feeling the Social Pressure

Proving the stigma further, there are still 13% of people across generations who have chosen to conceal their low or no-alcohol drinks choice because of social pressures in the past year. This is highest amongst Gen Z, which jumps to 21%. Similarly, 26% of people quizzed as part of this study say they have felt pressure to drink alcohol in certain social circumstances, again with younger generations most often giving in to this peer pressure (36% of Gen Z and 33% of Millennials compared to 25% of Gen X and only 13% of Boomers). And almost one in five (17%) of people have felt like an outsider when drinking low or no-alcohol versions of alcoholic drinks in a situation where others are drinking alcoholic drinks (increasing to 26% for Gen Z and 24% for Millennials).



Roughly a quarter of Gen Zs and Millennials in the UK (Z32%, M30%), USA (Z28%, M26%), Spain (Z24%, M23%) and Brazil (Z27%, M25%) feel the need to explain themselves when choosing low or no-alcohol drinks at social gatherings. This figure is marginally lower in Japan (Z24%, M22%)³³, with just over a fifth feeling a similar sentiment. This feeling that people need to justify their non-alcoholic drinks choice is clearly felt strongly throughout all these developed countries, which shows that the pervasive social stigma is not isolated to one nation or even one generation, emphasising its deep-rooted nature.

The lingering need to justify why one chooses a low or no-alcohol drink is likely declining as drinking patterns change and low or no-alcohol options become more familiar (and accepted). The emerging trend of balancing one’s consumption of alcoholic and low and no-alcohol versions is reflected more generally in the younger generations believe that they have the right to a work / life balance that works for them. This reflects a growing belief in the younger generations about making their own choices, rather than simply following the crowd or all previous generations.

³³ Question: ‘To what extent do you agree or disagree with the following statements? I feel the need to explain and justify my choice of drink, when or if I chose to drink a low or no alcohol versions of alcoholic drinks at a social occasion’ (% responding ‘Strongly agree’; UK5%; Sp5%; USA6%; Ja4%; Br9%*) (Net: Strongly/Tend to agree; UK20%; Sp16%; USA16%*; Ja17%; Br23%*) Base: all adults aged 18-75 yrs

Younger Men's Fear of Judgement

In all these circumstances, young men appear to feel the social pressure more than women. Gen Z and Millennial men are more concerned about what others think of their choice of drink when out at social gatherings or parties³⁴, they feel a greater need to conceal that they are drinking low or no-alcohol drinks³⁵ because of this, and they are more likely than their female counterparts to agree that they feel like an outsider drinking low or no-alcohol versions of alcoholic drinks in a situation where others are drinking alcoholic drinks³⁶.



Despite this social pressure being felt more by younger men, it's clear the higher social acceptability of non-alcoholic beverages and shifting stigma is starting to rub off across society, as 71% of men said they have drunk low or no-alcohol versions of alcoholic drinks.

This result suggests that despite increased gender fluidity in the younger generations, the influence of traditional gender stereotypes is still felt. That being said, it is interesting to consider how social media and even reality TV are helping to change attitudes and social norms by, for example, showing that successful social interactions can take place in the absence of a need for a social lubricant (alcohol) (e.g., reality TV). At the same time, and again especially amongst the younger generations, following a healthy lifestyle appears to act as a positive motivate (i.e., it is seen as socially desirable).

34 Question: 'To what extent do you agree or disagree with the following statements? I worry about what others think of my choice of drink when out at social gatherings or parties' (Net: Strongly/Tend to agree; All: 15%). Gen Z and Millennials influenced significantly more than other generational cohorts by what other people think (Z24%**; M21%*; X12%; B5%). Gen Z and Millennial men more than women ZM26%/ZF23%*; MM23%/MF18%*) Base: all adults aged 18-75 years.

35 Question: 'To what extent do you agree or disagree with the following statements? I have concealed drinking low or non-alcoholic drinks, e.g., soft drinks, low or no alcohol versions of alcoholic drinks because of social pressures'. 13% of those quizzed agreed (Net: Strongly/Tend to agree), with younger males more likely to agree (ZM23%/ZF20%*; MM23%/MF15%*; XM13%/XF8%*), while younger women are more likely to disagree with the claim (ZM45%/ZF50%*; MM50%/MF57%*; XM61%/XF64%*). Base: all adults aged 18-75 years.

36 Question: 'To what extent do you agree or disagree with the following statements? I have felt like an outsider drinking low or no alcohol versions of alcoholic drinks in a situation where others are drinking alcoholic drinks'. 17% of those quizzed agreed (Net: Strongly/Tend to agree), with younger generations being more likely to have felt like an outsider (Z26%*; M24%*; X15%; B8%). Base: all adults aged 18-75 years.

4

Gen Z Deep Dive



Gen Z are the generation who are most savvy in terms of low and no-alcohol versions of alcoholic drinks (see Ludmir, 2023)...

- 73% of Gen Z have tried low or no-alcohol versions of alcoholic beverages (second only to Millennials (75%) among the generations surveyed).
- 34% of Gen Z have received positive reactions from friends and family for their NAB choices (the highest of any generation surveyed).
- Almost half of Gen Z (48%) agree that they prefer to follow people on social media who appear to have a healthy lifestyle – more likely than both Gen X and Boomers.
- 44% of Gen Z believe that social media and reality TV encourages people to be more health conscious.
- Gen Z men are more likely to drink low or no-alcohol versions of alcoholic drinks at a music concert than Gen Z women (27% vs 21%), while at sporting events, men are more likely to drink both alcoholic and non-alcoholic drinks than women.
- Gen Z are more likely than older cohorts to be influenced by seeing other people they are with drinking low or no-alcohol versions of alcoholic drinks (10% influenced by ‘Low or no-alcohol branded glassware’ and 13% by ‘seeing low or no-alcohol beer on social media’).

However, Gen Z also feel the most social pressure when it comes to the non-alcoholic beverage space...

- Gen Z are the most likely generation to end up drinking alcohol at social occasions despite intending to drink low or no-alcohol drinks (60% of those who drink alcohol at least once or twice a year say they ‘always’ or ‘sometimes’ do this).
- 60% of Gen Z agree that, on social media, they see a lot of people having fun drinking alcoholic drinks at parties and events.
- Over 1/3 of Gen Zers have felt pressure to drink alcohol in social situations (the highest of any of the generations surveyed).
- 21% of Gen Z have been called out³⁷ on their choice of a non-alcoholic drink (compared to the 15% generational average).
- Gen Z are less likely than Millennials say they drink low and no-alcohol versions of alcoholic drinks on a weekend night out with friends (Z33%; M40%; X33%; B33%).
- 36% of Gen Z are willing to drink low or no-alcohol drinks if their friends do (this rises to 38% for Gen Z men).
- 24% of Gen Z worry about what others think of their choice of drink when out at social gatherings or parties.
- 30% of Gen Z men feel the need to justify their choice of non-alcoholic drink.
- 29% of Gen Z men feel like outsiders when opting for low or no-alcohol options.

³⁷ 21% of Gen Z selected “Mild teasing or jokes on my choice of drink” when asked “Which, if any, of the following reactions have you had from family, friends or colleagues when you are drinking low or no alcohol versions of alcoholic drinks?”, compared to an overall generational average of 15%.

5

Individual Countries



UK

Key trends

- The overall acceptability of low or no-alcohol versions of alcoholic drinks has increased in recent years, especially in the UK (63%)³⁸.
- Almost a quarter of adults in the UK (24%) who have consumed low or no-alcohol drinks in the last year said their family, friends, and colleagues had a positive reaction to their choice³⁹.
- Productivity comes to the fore in the choice of no and low-alcohol versions of alcoholic drinks, with 4 in 10 of those in the UK (40%) who have consumed low or no alcohol drinks at least once/twice in last year opting for non-alcoholic drinks during the evening or night before an important engagement the next day⁴⁰.
- One in five of those in the UK (20%) have felt the need to explain themselves when choosing low or no-alcohol drinks at social gatherings⁴¹.

38 Question: 'If you were to drink low or no alcohol versions of alcoholic drinks with people you know, do you think it is more acceptable or less acceptable now compared to 5 years ago, or do you think it is the same?' Base: all adults aged 18-75 years old

39 Question: 'Which, if any, of the following reactions have you had from family, friends or colleagues when you are drinking low or no alcohol versions of alcoholic drinks?' Base: All adults aged 18-75 who have consumed low or no alcohol drinks at least once/twice in last year

40 Question: 'During which, if any, of the following times or periods are you more likely to opt for a low or no alcohol version of an alcoholic drink as an alternative to an alcoholic drink?' Base: All adults aged 18-75 who have had low or no alcohol drinks once/twice in last year or more

41 Question: 'To what extent do you agree or disagree with the following statements? I feel the need to explain and justify my choice of drink, when or if I chose to drink a low or no alcohol versions of alcoholic drinks at a social occasion' (Net: Strongly/Tend to agree=20%), Base: all adults aged 18-75 years old

- More than 1 in 10 adults from the UK (11%) have chosen to conceal their low or no-alcohol drinks choice because of social pressures during the past year⁴².
- Almost 4 in 10 of those quizzed in the UK who drink alcohol at least once or twice a year (39%) reported that at social occasions they often seem to end up drinking alcohol despite intending to drink low or no-alcohol drinks (5% answered 'Always' and 34% answered 'Sometimes')⁴³.
- Almost 1 in 4 of those quizzed in the UK (24%) agreed that they would drink low or no-alcohol versions of alcoholic drinks if their friends also drank them⁴⁴.
- Intriguingly, almost 1 in 4 of those quizzed in the UK (24%) thought that social media normalizes drinking low or no-alcohol versions of alcoholic drinks⁴⁵.
- Society has moved on from the all or nothing approach when it comes to drinks choices. 12% of those from the UK responded that they drink both drinks at least once a week, while 26% reported that they drink both drinks at least once a month⁴⁶.
- The confident stance of those from the UK on 'dry' social situations extends to dating. Of those who drink low and no alcohol versions of alcoholic drinks, 38% report that they would order a drink from the low and no category on an evening date⁴⁷.

42 Question: 'To what extent do you agree or disagree with the following statements? I have concealed drinking low or non-alcoholic drinks, e.g. soft drinks, low or no alcohol versions of alcoholic drinks because of social pressures' (Net: Strongly/Tend to agree=11%), Base: all adults aged 18-75 years old

43 Question: 'At social occasions (e.g., visiting friends, having people around to your home, going to restaurants, pubs and bars, parties, BBQs, etc.) and assuming there is nothing preventing you from drinking an alcoholic drink (e.g., you are not driving, etc.), how often, if at all, have you arrived intending on drinking a low or non-alcoholic drink and ended up drinking alcoholic drinks instead?' Base: All adults aged 18-75 who drink alcohol once/twice a year or more

44 Question: 'To what extent do you agree or disagree with the following statements? I would drink low or no alcohol versions of alcoholic drinks if my friends also drank them' (Net: Strongly/Tend to agree=24%), Base: all adults aged 18-75 years old

45 Question: 'To what extent do you agree or disagree with the following statements? Social media normalises drinking low or no alcoholic versions of alcoholic drinks' (Net: Strongly/Tend to agree=24%), Base: all adults aged 18-75 years old

46 Question: 'How often, if at all, do you personally drink the following types of drinks? Please consider all occasions you may drink them i.e. at home or outside home. Low or no alcohol versions of alcoholic drinks (e.g. low or no alcohol beer, cider, wine, spirits, etc.)' Base: all adults aged 18-75 years old

47 Question: 'For the following places/settings, which, if any, of the following drinks do you drink? When out on a date in the evening' Base: All adults aged 18-75 years old who have had low or no alcohol drinks once/twice in last year or more

Country-specific trends

- More than six in ten (63%) Brits think it is much or a little more acceptable to drink low or no alcohol versions of alcoholic drinks with people they know (e.g. friends, family, colleagues) than it was 5 years ago.
- Brits are significantly less likely to worry (69%) about what other people think of their drink choices when out at social gatherings and parties than are participants from the other countries surveyed.
- One fifth (19%) of Brits who drink alcoholic beer once a year or more believe that making low or no alcohol beers available on draft would make them more likely to choose this option.
- Brits are also more price-sensitive than customers from the other countries surveyed – 32% of Brits who drink alcoholic beer once a year or more said they would be more likely to choose a low or no alcohol beer if it was cheaper than alcoholic beer⁴⁸.
- Among those who have consumed low or no alcohol drinks at least once/twice in last year, Brits are more likely to opt for a low or no alcohol version of an alcoholic drink on midweek evenings, and the night before a sporting activity/trip to the gym⁴⁹.
- Among those who have consumed low or no alcohol drinks at least once/twice in last year, Brits are more likely to opt for a low or no alcohol version of an alcoholic drink the evening/night before an important engagement the next day (perhaps suggesting that they want to stay sharp for work)⁵⁰.

⁴⁸ Question: 'Which, if any, of the following, would make you more likely to choose a low or no alcohol beer? (% responding 'If it was cheaper than alcoholic beer'; UK32%*; Sp14%; USA17%; Ja19%; Br27%) Base: all adults aged 18-75 yrs who drink alcoholic beer once /twice a year or more

⁴⁹ Question: During which, if any, of the following times or periods are you more likely to opt for a low or no alcohol version of an alcoholic drink as an alternative to an alcoholic drink? Please select all that apply (% responding 'Midweek - during the evenings'; UK31%*; Sp24%; USA29%*; Ja21%; Br23%) (% responding 'The evening/night before sport activity/gym the next day'; UK26%*; Sp19%; USA28%; Ja15%; Br18%) Base: all adults aged 18-75 yrs who have had low or no alcohol drinks once/twice in last year or more

⁵⁰ Question: During which, if any, of the following times or periods are you more likely to opt for a low or no alcohol version of an alcoholic drink as an alternative to an alcoholic drink? Please select all that apply (% responding 'The evening/night before an important engagement the next day; UK40%*; Sp26%; USA35%*; Ja39%*; Br27%) Base: all adults aged 18-75 yrs who have had low or no alcohol drinks once/twice in last year or more

USA

Key trends

- The overall acceptability of low or no-alcohol versions of alcoholic drinks has increased in recent years, with the USA average (45%) falling in the middle of the five countries surveyed⁵¹.
- In the USA, 37% of adults who have consumed low or no-alcohol drinks in the last year said their family, friends, and colleagues had a positive reaction to their choice⁵².
- Productivity comes to the fore in the choice of no and low-alcohol versions of alcoholic drinks, with just over a third of those in the USA (35%) who have consumed low or no alcohol drinks at least once/twice in last year opting for non-alcoholic drinks during the evening or night before an important engagement the next day⁵³.
- Almost one in five of those in the USA (16%) have felt the need to explain themselves when choosing low or no-alcohol drinks at social gatherings⁵⁴.
- More than 1 in 10 adults in the USA (13%) have chosen to conceal their low or no-alcohol drinks choice because of social pressures during the past year⁵⁵.

51 Question: 'If you were to drink low or no alcohol versions of alcoholic drinks with people you know, do you think it is more acceptable or less acceptable now compared to 5 years ago, or do you think it is the same?' Base: all adults aged 18-75 years old

52 Question: 'Which, if any, of the following reactions have you had from family, friends or colleagues when you are drinking low or no alcohol versions of alcoholic drinks?' Base: All adults aged 18-75 who have had low or no alcohol drinks once/twice in last year or more

53 Question: 'During which, if any, of the following times or periods are you more likely to opt for a low or no alcohol version of an alcoholic drink as an alternative to an alcoholic drink?' Base: All adults aged 18-75 who have had low or no alcohol drinks once/twice in last year or more

54 Question: 'To what extent do you agree or disagree with the following statements? I feel the need to explain and justify my choice of drink, when or if I chose to drink a low or no alcohol versions of alcoholic drinks at a social occasion' (Net: Strongly/Tend to agree=16%), Base: all adults aged 18-75 years old

55 Question: 'To what extent do you agree or disagree with the following statements? I have concealed drinking low or non-alcoholic drinks, e.g. soft drinks, low or no alcohol versions of alcoholic drinks because of social pressures' (Net: Strongly/Tend to agree=13%), Base: all adults aged 18-75 years old

- Almost 1 in 2 of those quizzed in the USA (48%) who drink alcohol at least once or twice a year reported that at social occasions they often seem to end up drinking alcohol despite intending to drink low or no-alcohol drinks (13% answered ‘Always’ and 34% answered ‘Sometimes’)⁵⁶.
- Almost 1 in 4 of those quizzed in the USA (23%) agreed they would drink low or no-alcohol versions of alcoholic drinks if their friends also drank them⁵⁷.
- Intriguingly, more 1 in 4 of those quizzed in the USA (26%) thought that social media normalizes drinking low or no-alcohol versions of alcoholic drinks⁵⁸.
- Society has moved on from the all or nothing approach when it comes to drinks choices. 17% of those from the USA responded that they drink both drinks at least once a week, while 26% reported that they drink both drinks at least once a month⁵⁹.
- The confident stance of those from the USA on ‘dry’ social situations extends to dating. Of those who drink low and no alcohol versions of alcoholic drinks, 34% report that they would order a drink from the low and no category on an evening date⁶⁰.

56 Question: ‘At social occasions (e.g., visiting friends, having people around to your home, going to restaurants, pubs and bars, parties, BBQs, etc.) and assuming there is nothing preventing you from drinking an alcoholic drink (e.g., you are not driving, etc.), how often, if at all, have you arrived intending on drinking a low or non-alcoholic drink and ended up drinking alcoholic drinks instead?’ Base: All adults aged 18-75 who drink alcohol once/twice a year or more

57 Question: ‘To what extent do you agree or disagree with the following statements? I would drink low or no alcohol versions of alcoholic drinks if my friends also drank them’ (Net: Strongly/Tend to agree=23%), Base: all adults aged 18-75 years old

58 Question: ‘To what extent do you agree or disagree with the following statements? Social media normalises drinking low or no alcoholic versions of alcoholic drinks’ (Net: Strongly/Tend to agree=26%), Base: all adults aged 18-75 years old

59 Question: ‘How often, if at all, do you personally drink the following types of drinks? Please consider all occasions you may drink them i.e. at home or outside home. Low or no alcohol versions of alcoholic drinks (e.g. low or no alcohol beer, cider, wine, spirits, etc.)’ Base: all adults aged 18-75 years old

60 Question: ‘For the following places/settings, which, if any, of the following drinks do you drink? When out on a date in the evening’ Base: All adults aged 18-75 years old who have had low or no alcohol drinks once/twice in last year or more

Country-specific trends

- Among those who have consumed low or no alcohol drinks at least once/twice in last year, people from the US are significantly more likely to experience positive support for their choice when they decide to drink a low or no alcohol version of an alcoholic drink than those from the other four countries surveyed⁶¹.
- Among those who have consumed low or no alcohol drinks at least once/twice in last year, people from the US are generally more likely to opt for a low or no alcohol version of an alcoholic drink on midweek evenings, and the night before a sporting activity/trip to the gym⁶².
- Among those who have consumed low or no alcohol drinks at least once/twice in last year, people in the US are more likely to opt for a low or no alcohol version of an alcoholic drink the evening/night before an important engagement the next day (perhaps suggesting that they want to stay sharp for work)⁶³.

61 Question: 'Which, if any, of the following reactions have you had from family, friends or colleagues when you are drinking low or no alcohol versions of alcoholic drinks? Please select all that apply.' (% responding 'Positive support on my choice of drink'; UK18%; Sp14%; USA31%*; Ja17%; Br23%) (Net: Any positive response; UK24%; Sp21%; USA37%*; Ja25%; Br32%) Base: all adults aged 18-75 years who have had low or no alcohol drinks once/twice in last year or more

62 Question: 'During which, if any, of the following times or periods are you more likely to opt for a low or no alcohol version of an alcoholic drink as an alternative to an alcoholic drink? Please select all that apply' (% responding 'Midweek - during the evenings'; UK31%*; Sp24%; USA29%*; Ja21%; Br23%) (% responding 'The evening/night before sport activity/gym the next day'; UK26%*; Sp19%; USA28%; Ja15%; Br18%) Base: all adults aged 18-75 yrs who have had low or no alcohol drinks once/twice in last year or more

63 Question: 'During which, if any, of the following times or periods are you more likely to opt for a low or no alcohol version of an alcoholic drink as an alternative to an alcoholic drink? Please select all that apply' 'The evening/night before an important engagement the next day; UK40%*; Sp26%; USA35%*; Ja39%*; Br27%) Base: all adults aged 18-75 yrs who have had low or no alcohol drinks once/twice in last year or more

Spain

Key trends

- The overall acceptability of low or no-alcohol versions of alcoholic drinks has increased in recent years, with the Spanish average (46%) falling in the middle of the five countries surveyed⁶⁴.
- Just over one in five adults in Spain (21%) who have consumed low or no-alcohol drinks in the last year said their family, friends, and colleagues had a positive reaction to their choice⁶⁵.
- Productivity is important in the choice of no and low-alcohol versions of alcoholic drinks, with just over a quarter of those who have consumed low or no alcohol drinks at least once/twice in last year in Spain (26%) opting for non-alcoholic drinks during the evening or night before an important engagement the next day⁶⁶.
- Almost one in five of those in Spain (16%) have felt the need to explain themselves when choosing low or no-alcohol drinks at social gatherings⁶⁷.
- More than 1 in 10 Spanish adults (12%) have chosen to conceal their low or no-alcohol drinks choice because of social pressures during the past year⁶⁸.
- Almost 6 in 10 of those quizzed in Spain (57%) who drink alcohol at least once or twice a year reported that at social occasions they often seem to end up drinking alcohol despite intending to drink low or no-alcohol drinks (13% answered 'Always' and 44% answered 'Sometimes')⁶⁹.

⁶⁴ Question: 'If you were to drink low or no alcohol versions of alcoholic drinks with people you know, do you think it is more acceptable or less acceptable now compared to 5 years ago, or do you think it is the same?' Base: all adults aged 18-75 years old

⁶⁵ Question: 'Which, if any, of the following reactions have you had from family, friends or colleagues when you are drinking low or no alcohol versions of alcoholic drinks?' Base: All adults aged 18-75 who have had low or no alcohol drinks once/twice in last year or more

⁶⁶ Question: 'During which, if any, of the following times or periods are you more likely to opt for a low or no alcohol version of an alcoholic drink as an alternative to an alcoholic drink?' Base: All adults aged 18-75 who have had low or no alcohol drinks once/twice in last year or more

⁶⁷ Question: 'To what extent do you agree or disagree with the following statements? I feel the need to explain and justify my choice of drink, when or if I chose to drink a low or no alcohol versions of alcoholic drinks at a social occasion' (Net: Strongly/Tend to agree=16%), Base: all adults aged 18-75 years old

⁶⁸ Question: 'To what extent do you agree or disagree with the following statements? I have concealed drinking low or non-alcoholic drinks, e.g. soft drinks, low or no alcohol versions of alcoholic drinks because of social pressures' (Net: Strongly/Tend to agree=12%), Base: all adults aged 18-75 years old

⁶⁹ Question: 'At social occasions (e.g., visiting friends, having people around to your home, going to restaurants, pubs and bars, parties, BBQs, etc.) and assuming there is nothing preventing you from drinking an alcoholic drink (e.g., you are not driving, etc.), how often, if at all, have you arrived intending on drinking a low or non-alcoholic drink and ended up drinking alcoholic drinks instead?' Base: All adults aged 18-75 who drink alcohol once/twice a year or more

- Almost 1 in 4 of those quizzed in Spain (22%) agreed they would drink low or no-alcohol versions of alcoholic drinks if their friends also drank them⁷⁰.
- Intriguingly, 1 in 3 of those quizzed in Spain (33%) thought that social media normalizes drinking low or no-alcohol versions of alcoholic drinks⁷¹.
- Society has moved on from the all or nothing approach when it comes to drinks choices. 38% of those from Spain responded that they drink both drinks at least once a week, while 59% reported that they drink both drinks at least once a month⁷².
- The confident stance of those from Spain on 'dry' social situations extends to dating. Of those who drink low and no alcohol versions of alcoholic drinks, 32% report that they would order a drink from the low and no category on an evening date⁷³.

Country-specific trends

- Spanish people are much more likely than those from the four other nations surveyed to drink both alcoholic and non-alcoholic versions of alcoholic drinks⁷⁴.
- Spanish people tend to think that people who drink low or no alcohol versions of alcoholic drinks are health conscious⁷⁵.

70 Question: 'To what extent do you agree or disagree with the following statements? I would drink low or no alcohol versions of alcoholic drinks if my friends also drank them' (Net: Strongly/Tend to agree=22%), Base: all adults aged 18-75 years old

71 Question: 'To what extent do you agree or disagree with the following statements? Social media normalises drinking low or no alcoholic versions of alcoholic drinks' (Net: Strongly/Tend to agree=33%), Base: all adults aged 18-75 years old

72 Question: 'How often, if at all, do you personally drink the following types of drinks? Please consider all occasions you may drink them i.e. at home or outside home. Low or no alcohol versions of alcoholic drinks (e.g. low or no alcohol beer, cider, wine, spirits, etc.)' Base: all adults aged 18-75 years old

73 Question: 'For the following places/settings, which, if any, of the following drinks do you drink? When out on a date in the evening' Base: All adults aged 18-75 years old who have had low or no alcohol drinks once/twice in last year or more

74 Question: 'How often, if at all, do you personally drink the following types of drinks? Please consider all occasions you may drink them i.e., at home or outside home. Alcoholic drinks (e.g., alcoholic beer, alcoholic wine, alcoholic spirits, etc.) and Low or no alcohol versions of alcoholic drinks (e.g., low or no alcohol beer, cider, wine, spirits, etc.) (Net: Both drinks at least once a week; UK12%; Sp38%*; USA17%; Ja16%; Br30%) (Net: Both drinks at least once a month; UK26%; Sp59%*; USA26%; Ja28%; Br53%) (Net: Both drinks at least once/twice last year; UK41%; Sp72%*; USA35%; Ja43%; Br64%) Base: all adults aged 18-75 yrs

75 Question: 'To what extent do you agree or disagree with the following statements? People who drink low or no alcohol versions of alcoholic drinks ...are health conscious' (% responding 'Strongly agree'; UK15%; Sp34%*; USA16%; Ja15%; Br33%*) (Net: Strongly/Tend to agree; UK57%; Sp65%*; USA54%; Ja53%; Br67%*) Base: all adults aged 18-75 yrs

Brazil

Key trends

- The overall acceptability of low or no-alcohol versions of alcoholic drinks has increased in recent years, with the Brazil average (50%) surpassing three of the five countries surveyed⁷⁶.
- Almost a third of adults in Brazil (32%) who have consumed low or no-alcohol drinks in the last year said their family, friends, and colleagues had a positive reaction to their choice⁷⁷.
- Productivity is important in the choice of no and low-alcohol versions of alcoholic drinks, with just over a quarter of those who have consumed low or no alcohol drinks at least once/twice in last year in Brazil (27%) opting for non-alcoholic drinks during the evening or night before an important engagement the next day⁷⁸.
- Almost a quarter of those from Brazil (23%) have felt the need to explain themselves when choosing low or no-alcohol drinks at social gatherings⁷⁹.
- Almost 1 in 5 Brazilian adults (18%) have chosen to conceal their low or no-alcohol drinks choice because of social pressures during the past year⁸⁰.
- Seven in 10 of those quizzed in Brazil (70%) who drink alcohol at least once or twice a year reported that at social occasions they often seem to end up drinking alcohol despite intending to drink low or no-alcohol drinks (26% answered 'Always' and 44% answered 'Sometimes')⁸¹.

76 Question: 'If you were to drink low or no alcohol versions of alcoholic drinks with people you know, do you think it is more acceptable or less acceptable now compared to 5 years ago, or do you think it is the same?' Base: all adults aged 18-75 years old

77 Question: 'Which, if any, of the following reactions have you had from family, friends or colleagues when you are drinking low or no alcohol versions of alcoholic drinks?' Base: All adults aged 18-75 who have had low or no alcohol drinks once/twice in last year or more

78 Question: 'During which, if any, of the following times or periods are you more likely to opt for a low or no alcohol version of an alcoholic drink as an alternative to an alcoholic drink?' Base: All adults aged 18-75 who have had low or no alcohol drinks once/twice in last year or more

79 Question: 'To what extent do you agree or disagree with the following statements? I feel the need to explain and justify my choice of drink, when or if I chose to drink a low or no alcohol versions of alcoholic drinks at a social occasion' (Net: Strongly/Tend to agree=23%), Base: all adults aged 18-75 years old

80 Question: 'To what extent do you agree or disagree with the following statements? I have concealed drinking low or non-alcoholic drinks, e.g. soft drinks, low or no alcohol versions of alcoholic drinks because of social pressures' (Net: Strongly/Tend to agree=18%), Base: all adults aged 18-75 years old

81 Question: 'At social occasions (e.g., visiting friends, having people around to your home, going to restaurants, pubs and bars, parties, BBQs, etc.) and assuming there is nothing preventing you from drinking an alcoholic drink (e.g., you are not driving, etc.), how often, if at all, have you arrived intending on drinking a low or non-alcoholic drink and ended up drinking alcoholic drinks instead?' Base: All adults aged 18-75 who drink alcohol once/twice a year or more

- One in 3 of those quizzed in Brazil (33%) agreed they would drink low or no-alcohol versions of alcoholic drinks if their friends also drank them⁸².
- Intriguingly, almost 4 in 10 of those quizzed in Brazil (38%) thought that social media normalizes drinking low or no-alcohol versions of alcoholic drinks⁸³.
- Society has moved on from the all or nothing approach when it comes to drinks choices. 30% of those from Brazil responded that they drink both drinks at least once a week, while 53% reported that they drink both drinks at least once a month⁸⁴.
- The confident stance of those from Brazil on 'dry' social situations extends to dating. Of those who drink low and no alcohol versions of alcoholic drinks, 36% report that they would order a drink from the low and no category on an evening date⁸⁵.

Country-specific trends

- Brazilians who drink alcohol at least once or twice a year are significantly more likely to end-up drinking alcohol at social occasions when they had intended not to drink alcohol. Brits, by contrast, find it significantly easier to stick to their guns/intentions⁸⁶.
- Brazilians feel more of a need to explain and justify drinking low or no alcohol versions of alcoholic drinks than do people from the other four countries surveyed⁸⁷.
- Brazilians are significantly more likely to have concealed their drinking of alcoholic drinks because of social pressures than people from the other four countries surveyed⁸⁸.

82 Question: 'To what extent do you agree or disagree with the following statements? I would drink low or no alcohol versions of alcoholic drinks if my friends also drank them' (Net: Strongly/Tend to agree=33%), Base: all adults aged 18-75 years old

83 Question: 'To what extent do you agree or disagree with the following statements? Social media normalises drinking low or no alcoholic versions of alcoholic drinks' (Net: Strongly/Tend to agree=38%), Base: all adults aged 18-75 years old

84 Question: 'How often, if at all, do you personally drink the following types of drinks? Please consider all occasions you may drink them i.e. at home or outside home. Low or no alcohol versions of alcoholic drinks (e.g. low or no alcohol beer, cider, wine, spirits, etc.)' Base: all adults aged 18-75 years old

85 Question: 'For the following places/settings, which, if any, of the following drinks do you drink? When out on a date in the evening' Base: All adults aged 18-75 years old (18-65 in Brazil) who have had low or no alcohol drinks once/twice in last year or more

86 Question: 'At social occasions (e.g., visiting friends, having people around to your home, going to restaurants, pubs and bars, parties, BBQs, etc.) and assuming there is nothing preventing you from drinking an alcoholic drink, e.g., you are not driving, etc.), how often, if at all, have you arrived intending on drinking a low or non-alcoholic drink and ended up drinking alcoholic drinks instead?' (% responding 'Always'; UK5%; Sp13%; USA13%; Ja12%; Br26%*) (% responding 'Never'; UK21%*; Sp13%; USA9%; Ja13%; Br9%) Base: all adults aged 18-75 years (18-65 in Brazil) who drink alcohol once/twice a year or more

87 Question: 'To what extent do you agree or disagree with the following statements? I feel the need to explain and justify my choice of drink, when or if I chose to drink a low or no alcohol versions of alcoholic drinks at a social occasion' (% responding 'Strongly agree'; UK5%; Sp5%; USA6%; Ja4%; Br9%*) (Net: Strongly/Tend to agree; UK20%; Sp16%; USA16%*; Ja17%; Br23%*) Base: all adults aged 18-75 yrs (Brazil adults aged 18-65)

88 Question: 'To what extent do you agree or disagree with the following statements? I have concealed drinking an alcoholic drink because of social pressures.' (% responding 'Strongly agree'; UK4%; Sp5%; USA5%; Ja3%; Br7%*) (Net: Strongly/Tend to agree; UK11%; Sp13%; USA13%*; Ja6%; Br16%*) Base: all adults aged 18-75 yrs (Brazil adults aged 18-65)

- ‘Follow the crowd?’: Brazilians are much more likely to drink low or no alcohol versions of alcoholic drinks if their friends also drink them⁸⁹.
- Brazilians are also much more worried by what other people think of their choice of drinks⁹⁰.
- People in Brazil who have consumed low or no alcohol drinks at least once/twice in last year, meanwhile, believe that it would help if more low or no alcohol beer appeared on social media⁹¹.
- People in Brazil tend to think that people who drink low or no alcohol versions of alcoholic drinks are health conscious⁹².

89 Question: ‘To what extent do you agree or disagree with the following statements? I would drink low or no alcohol versions of alcoholic drinks if my friends also drank them.’ (% responding ‘Strongly agree’; UK7%; Sp8%; USA7%; Ja8%; Br13%*) (Net: Strongly/Tend to agree; UK24%; Sp22%; USA23%*; Ja28%; Br33%*) Base: all adults aged 18-75 yrs (Brazil adults aged 18-65)

90 Question: ‘To what extent do you agree or disagree with the following statements? I worry about what others think of my choice of drink when out at social gatherings or parties’ (% responding ‘Strongly agree’; UK4%; Sp4%; USA5%; Ja3%; Br8%*) (Net: Strongly/Tend to agree; UK13%; Sp14%; USA13%*; Ja12%; Br20%*) (Net: Strongly/Tend to disagree; UK69%*; Sp63%; USA64%*; Ja62%; Br48%) Base: all adults aged 18-75 yrs (Brazil adults aged 18-65)

91 Question: ‘Which, if any, of the following, would make you more likely to choose a low or no alcohol beer? (% responding ‘Seeing low or no alcohol beer on social media’; UK7%; Sp5%; USA9%; Ja6%; Br13%*) Base: all adults aged 18-75 yrs (18-65 in Brazil) who drink alcoholic beer once /twice a year or more

92 Question: ‘To what extent do you agree or disagree with the following statements? People who drink low or no alcohol versions of alcoholic drinks ...are health conscious’ (% responding ‘Strongly agree’; UK15%; Sp34%*; USA16%; Ja15%; Br33%*) (Net: Strongly/Tend to agree; UK57%; Sp65%*; USA54%; Ja53%; Br67%*) Base: all adults aged 18-75 yrs (Brazil adults aged 18-65)

Japan

Key trends

- The overall acceptability of low or no-alcohol versions of alcoholic drinks has increased in recent years, though markedly less so in Japan (41%) than in the other four countries surveyed⁹³.
- A quarter of adults in Japan (25%) who have consumed low or no-alcohol drinks in the last year said their family, friends, and colleagues had a positive reaction to their choice⁹⁴.
- Productivity comes to the fore in the choice of no and low-alcohol versions of alcoholic drinks, with almost 4 in 10 of those in Japan (39%) who have consumed low or no alcohol drinks at least once/twice in last year opting for non-alcoholic drinks during the evening or night before an important engagement the next day⁹⁵.
- Almost one in five of those in Japan (17%) have felt the need to explain themselves when choosing low or no-alcohol drinks at social gatherings⁹⁶.
- One in 10 Japanese adults (10%) have chosen to conceal their low or no-alcohol drinks choice because of social pressures during the past year⁹⁷.
- Almost 4 in 10 of those quizzed in Japan (37%) who drink alcohol at least once or twice a year reported that at social occasions they often seem to end up drinking alcohol despite intending to drink low or no-alcohol drinks (12% answered 'Always' and 26% answered 'Sometimes')⁹⁸.

93 Question: 'If you were to drink low or no alcohol versions of alcoholic drinks with people you know, do you think it is more acceptable or less acceptable now compared to 5 years ago, or do you think it is the same?' Base: all adults aged 18-75 years old

94 Question: 'Which, if any, of the following reactions have you had from family, friends or colleagues when you are drinking low or no alcohol versions of alcoholic drinks?' Base: All adults aged 18-75 who have had low or no alcohol drinks once/twice in last year or more

95 Question: 'During which, if any, of the following times or periods are you more likely to opt for a low or no alcohol version of an alcoholic drink as an alternative to an alcoholic drink?' Base: All adults aged 18-75 who have had low or no alcohol drinks once/twice in last year or more

96 Question: 'To what extent do you agree or disagree with the following statements? I feel the need to explain and justify my choice of drink, when or if I chose to drink a low or no alcohol versions of alcoholic drinks at a social occasion' (Net: Strongly/Tend to agree=17%), Base: all adults aged 18-75 years old

97 Question: 'To what extent do you agree or disagree with the following statements? I have concealed drinking low or non-alcoholic drinks, e.g. soft drinks, low or no alcohol versions of alcoholic drinks because of social pressures' (Net: Strongly/Tend to agree=10%), Base: all adults aged 18-75 years old

98 Question: 'At social occasions (e.g., visiting friends, having people around to your home, going to restaurants, pubs and bars, parties, BBQs, etc.) and assuming there is nothing preventing you from drinking an alcoholic drink e.g., you are not driving, etc.), how often, if at all, have you arrived intending on drinking a low or non-alcoholic drink and ended up drinking alcoholic drinks instead?' Base: All adults aged 18-75 who drink alcohol once/twice a year or more

- Almost 3 in 10 of those quizzed in Japan (28%) agreed they would drink low or no-alcohol versions of alcoholic drinks if their friends also drank them⁹⁹.
- Intriguingly, 1 in 4 of those quizzed in Japan (25%) thought that social media normalizes drinking low or no-alcohol versions of alcoholic drinks¹⁰⁰.
- Society has moved on from the all or nothing approach when it comes to drinks choices. 16% of those from Japan responded that they drink both drinks at least once a week, while 28% reported that they drink both drinks at least once a month¹⁰¹.
- The confident stance of those from Japan on 'dry' social situations extends to dating. Of those who drink low and no alcohol versions of alcoholic drinks, 36% report that they would order a drink from the low and no category on an evening date¹⁰².

99 Question: 'To what extent do you agree or disagree with the following statements? I would drink low or no alcohol versions of alcoholic drinks if my friends also drank them' (Net: Strongly/Tend to agree=28%), Base: all adults aged 18-75 years old

100 Question: 'To what extent do you agree or disagree with the following statements? Social media normalises drinking low or no alcoholic versions of alcoholic drinks' (Net: Strongly/Tend to agree=25%), Base: all adults aged 18-75 years old

101 Question: 'How often, if at all, do you personally drink the following types of drinks? Please consider all occasions you may drink them i.e. at home or outside home. Low or no alcohol versions of alcoholic drinks (e.g. low or no alcohol beer, cider, wine, spirits, etc.)' Base: all adults aged 18-75 years old

102 Question: 'For the following places/settings, which, if any, of the following drinks do you drink? When out on a date in the evening' Base: All adults aged 18-75 years old who have had low or no alcohol drinks once/twice in last year or more

Country-specific trends

- People in Japan are significantly more likely to drink low or no alcohol versions of alcoholic drinks for physical health reasons than those from the other four countries surveyed¹⁰³.
- People in Japan are also significantly less likely to order low or no alcohol versions of alcoholic drinks on a date¹⁰⁴.
- Among those who have consumed low or no alcohol drinks at least once/twice in last year, people in Japan are also significantly less likely to choose a low or no alcohol version of an alcoholic drink at Christmas, New Year, or at other celebratory periods¹⁰⁵.
- Among those who have consumed low or no alcohol drinks at least once/twice in last year, people in Japan are more likely to opt for a low or no alcohol version of an alcoholic drink the evening/night before an important engagement the next day (perhaps suggesting that they want to stay sharp for work)¹⁰⁶.

103 Question: 'For what reasons do you drink low or no alcohol versions of alcoholic drinks? Please select all that apply'. (% responding 'For physical health reasons'; UK22%; Sp24%; USA23%; Ja28%*; Br18%) Base: all adults aged 18-75 yrs who have had low or no alcohol drinks once/twice in last year or more

104 Question: 'For the following places/settings, which, if any, of the following drinks do you drink? When out on a date in the evening' (% responding 'Low or no alcohol versions of alcoholic drinks'; UK38%; Sp37%; USA34%; Ja27%*; Br36%) When out on a date in the daytime (% responding 'Low or no alcohol versions of alcoholic drinks'; UK29%; Sp29%; USA31%; Ja16%*; Br26%) Base: all adults aged 18-75 yrs who have had low or no alcohol drinks once/twice in last year or more

105 Question: 'During which, if any, of the following times or periods are you more likely to opt for a low or no alcohol version of an alcoholic drink as an alternative to an alcoholic drink? Please select all that apply' 'The evening/night before an important engagement the next day; UK40%; Sp26%; USA35%*; Ja39%*; Br27%) (% responding 'Celebratory periods/ local festivities e.g., Christmas, New Year'; UK21%; Sp22%; USA25%; Ja10%*; Br26%) Base: all adults aged 18-75 yrs who have had low or no alcohol drinks once/twice in last year or more

106 Question: 'During which, if any, of the following times or periods are you more likely to opt for a low or no alcohol version of an alcoholic drink as an alternative to an alcoholic drink?' (% responding 'The evening/night before an important engagement the next day' (UK40%; Sp26%; USA35%; Ja39%; Br27%) Base: All adults aged 18-75 who have had low or no alcohol drinks once/twice in last year or more

6

Conclusions



The key finding to emerge from this study is that despite a heightened acceptance of non-alcoholic drinkers, and therefore a reduction in social stigma in the five large developed nations surveyed here, it is evident that people still do sometimes face social judgement from others concerning their choice of non-alcoholic drinks. No matter in what guise the judgement is felt, many people nowadays still feel the need to give a reason for their choice of non-alcoholic drink, and in certain cases they have felt it easier to simply drink alcohol, or else to hide their NAB choices, so as to escape uncomfortable and awkward conversations altogether.

Despite the deeply ingrained stigma in this area, the responses captured in this large-scale five-nation survey demonstrate a clear shift in society that shows the dawn of a new era, as we reach something of a tipping point where judgement by others (be they friends, family, or one's social media networks) is lessening, and people's confidence in choosing to opt for a more balanced, and personalized, drinking lifestyle, is increasing. The results of the survey highlight several possible reasons for this welcome change.

It might reflect the diversification of social personas through the acceptance of people choosing how they want to identify. That is, it could be seen as reflecting the transition from conformity to individuality, and a growing recognition of, as well as confidence in asserting one's individuality through taste (link between personality and taste preferences; Spence, 2022). This, in turn, may lead to a more widespread growth in the personalization of taste experiences, and hence a growing curiosity about, as well as an acceptance of, NAB.

It appears that the general public in the five nations surveyed here are moving well beyond the 'sober curious' phase of a few years ago to adopting a more balanced pattern of consuming both alcoholic and low or no-alcohol versions of alcoholic drinks across a variety of drinking occasions. This transition is being aided in the beer category by both increased availability of low or no-alcohol options, especially in the on-trade, as well as a positive response to the taste of many of the low and no-alcohol beers that are currently on the market.

Although remnants of social stigma around the decision to choose low or no-alcohol versions of alcoholic drinks undoubtedly remain, especially evident in certain demographics (such as in young men and people in Brazil), more people than ever before are reporting that they have experienced positive responses from their friends and family to their choice of a low or no-alcohol version of alcoholic drinks.

It is interesting to see how aspects of social media and reality TV are normalizing socializing without the need for alcohol. At the same time, the individual decision to opt for a more balanced, and performance-based lifestyle is seen as an increasingly attractive (and aspirational) option, especially amongst younger generations.

It is reassuring to see that the evidence from the survey suggests that the younger generations are increasingly confident in asserting their individuality through the drinks choices they make. They see less need, or desire, to follow the crowd, as was perhaps more common previously. At the same time, there is a growing desire to support a productive way of life that sees socializing as just one element of a desirable and balanced lifestyle.

As we look to the future, the findings of the five-nation study outlined here clearly point to the gradual transition from a polarized position on the alcohol / 0.0 divide to a growing recognition that the optimal balance of alcoholic and low and no-alcohol options is a matter of personal choice. As the last remnants of social stigma around the choice of low to no-alcohol versions of alcoholic drinks slowly dissipate, people will increasingly find their own preferred balance in terms of the drinks choices they make, without feeling the need to justify themselves. Who knows, we may eventually come to a point when the ‘why?’ question is reversed, and is asked of those who continue to choose alcoholic options when low and no-alcohol alternatives become the increasingly preferred choice, a trend that is most obvious amongst Gen Z, but is starting to appear in the other demographics as well.

7

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