



39 Drury Lane
Covent Garden
WC2B 5RR

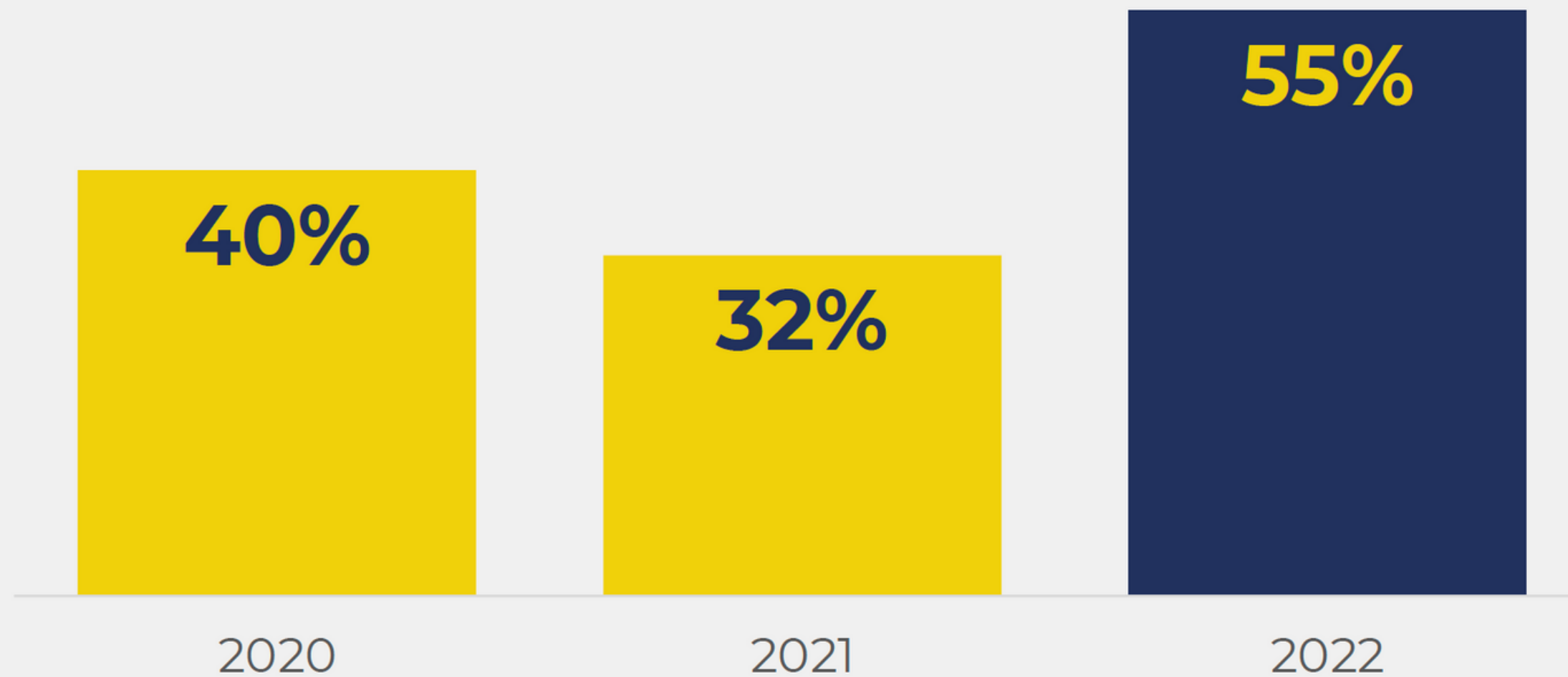


WHO DRINKS ALCOHOL- FREE BEER

joinclubsoda.com
[@joinclubsoda](https://www.instagram.com/joinclubsoda)

The desire to reduce alcohol consumption is increasing

% of consumers who say they are looking to reduce their alcohol consumption over the next 12 months





ESTABLISHED BEHAVIOURS



Emerging Behaviours

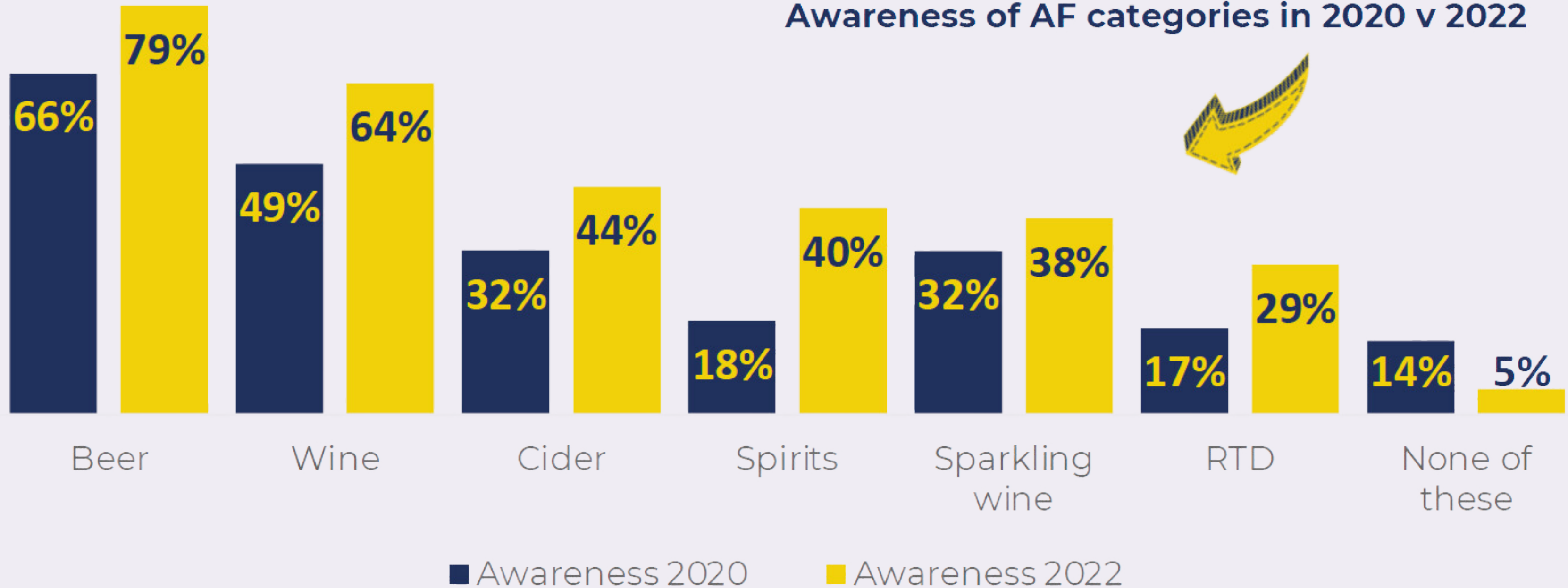




7 IN 10 **AF** DRINKERS REDUCING THEIR ALCOHOL CONSUMPTION

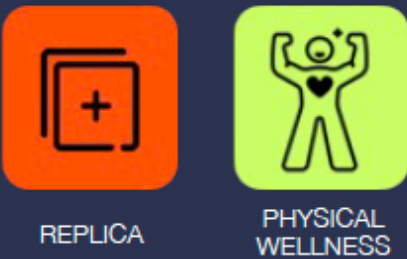
1. Enjoy the taste of an alcoholic drink without getting drunk (33%)
2. Cut down the amount of alcohol I drink (31%)
3. Temporary break from drinking (24%)
4. Prefer the taste of alcohol-free drinks (19%)
5. Less sugar in alcohol-free alternatives (15%)

Awareness of AF categories in 2020 v 2022



Low & No the customer perspective 2022 – Kam Media + Lucky Saint

Ageing Moderator



- Moderation for health reasons
- They are long-time alcohol drinkers
- Heavily supported by loved ones
- “Out of my control” makes it more acceptable to others
- Looks for replicas, especially beer
- Feels like they’re losing something

Michael



Who’s doing a good job for me right now...

Alcohol-free beers from Guinness, Heineken, Ghost Ship, and spirit alternatives like Gordon’s 0.0%

Sober Journey



- Sober Journey takes into account history of problematic drinking
- Highly emotional process
- Aims for drastic life improvement
- Seeks community
- Focused on mental and physical health
- Immense sense of pride attached to sobriety

Michelle




Who’s doing a good job for me right now...


Noughty, Lucky Saint, Crodino, Caleño, Lyres.

FREE-SPIRITED


Non-Drinker



SOCIAL INCLUSION



ELEVATED DRINKING EXPERIENCE



PEACE OF MIND

- Never or rarely drinks
- Not interested in alcohol
- Personal (health), religious, pregnancy
- Seeks refinement, craft and novelty
- Doesn't want to keep explaining why they're not drinking
- Aspires to blend in

Peter




Who's doing a good job for me right now...


Savyll Cocktails, Pure Booch, Square Root Soda, Only with Love beer and kombucha

FREE-SPIRITED


Non-Drinker



SOCIAL INCLUSION



ELEVATED DRINKING EXPERIENCE



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- Never or rarely drinks
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Nadia



Who's doing a good job for me right now...

Pentire, Everleaf, Three Spirit, Trip, Bemuse, Haelu, Big Drop

FREE-SPIRITED

Moderator



- In and out of the category
- Health conscious - moderating is an easy win
- Wants to avoid the effects of alcohol
- Thinks about what moderation allows them to do later
- Looks to upsell or diversify from soft drinks
- Looking for more balance in their lives

Alex



Who's doing a good
job for me right
now...

Lucky Saint,
Guinness, Moretti,
Old Mout Cider,
Three Spirit, Sentia,
Corona Sun Brew.

FREE-SPIRITED

Curious Drinker



- Sometimes "won't drink today"
- They're not actively looking for AF
- But very open and curious to try
- Will most likely try AF on-trade
- Likely to try and test similarities of a replica
- Expectations set from alcohol

Anne



Who's doing a good
job for me right
now...

New London Light,
Three Spirit, Hop &
Hemp, Sentia,
Crossip, Highpoint

FREE-SPIRITED

Maximiser



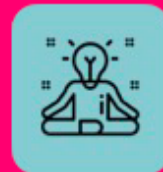
REPLICA



SOCIAL
INCLUSION



PHYSICAL
WELLNESS



PEACE OF
MIND

- Performance driven
- Maximises wellness in all aspects of life
- Aligns drinking habits with long term goals
- Avoids sugar, carbs, artificial, bloating
- Seeks added benefits and replicas
- Wants peace of mind and inclusion

THE MIX

themixglobal.com

Sophia



**Who's doing a good
job for me right
now...**

Kombucha, Corona
Sun Brew, UNLTD,
Trip CBD, Three
Spirit

SOCIAL INCLUSION



REWARD



HEALTH DRINK



BUILDING CONFIDENCE



Many former wine drinkers switch to alcohol-free beer - categories that are slow to innovate lose drinkers as consumers cut down.

How Brits are Embracing Mindful Drinking – Consumer Behaviours on Low and No Alcohol Drinks in the UK 2021

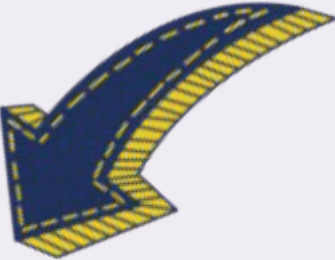


REASONS FOR NOT CHOOSING ALCOHOL-FREE DRINKS

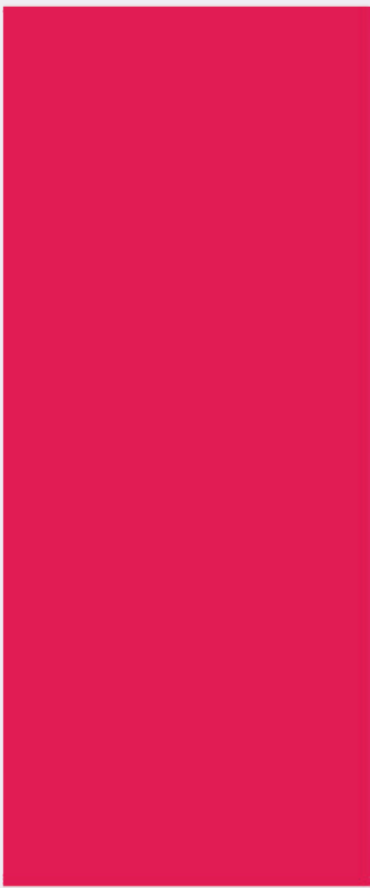
- I prefer soft drinks like coke or orange juice – 46%
- I would just rather drink alcoholic drinks – 38%
- I don't need to cut back on my drinking – 30%
- Alcohol-free drinks seem too expensive – 19%
- I think they would taste worse – 14%



Size of prize, by category, in
converting awareness into trial



£99,900,000



Beer

£91,800,000



Wine

£72,900,000



Cider

£70,200,000



Spirits

£56,700,000



Sparkling
wine

£51,300,000



RTD

■ SoP

Low & No the customer perspective 2022 – Kam Media + Lucky Saint

How can licensed venues sell more low and no alcohol beers?

1. Improving Availability – multiplicity/wholesalers/caterers
2. Challenging Perceptions of Price – take time/advocates/equalise offers
3. Challenging Perceptions of Quality – sampling/training
4. Improving Visibility – draught/proactive offer/dispel misconceptions
5. Clarifying Labelling – lobby/trusted voices/research into low
6. Discussing Health Benefits – labelling/training

Improving Sales of Low and No Alcohol Beer 2019
funded by the Brewers Research & Education Fund



LABELLING & OTHER THREATS



- Clarity of labelling
- 0.0 vs 0.5
- Alibi Marketing
- Gateway product
- Price



MOOD
ENHANCING

COLLABORATION



HOW TO CONTACT US

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