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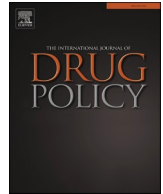
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Research Paper

“I don’t want to introduce it into new places in my life”: The marketing and consumption of no and low alcohol drinks

Emily Nicholls^{*}

Lecturer in Sociology, University of York, United Kingdom

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ABSTRACT

Introduction: Recent years have seen an expanding ‘no and low alcohol’ (NoLo) drinks market in the United Kingdom and other high-income countries. With the UK government pledging to increase the availability of NoLos and encourage their consumption, further research is required to underpin policy and explore the potential for NoLos to ease – or exacerbate – alcohol-related harm.

Methods: This paper draws on original primary research on NoLo marketing and consumption in the UK; analysis of two NoLo marketing campaigns and semi-structured interviews with both drinkers and non-drinkers who consume NoLos.

Findings and discussion: Addition marketing was identified in the promotion of NoLo products, encouraging consumers to incorporate NoLo consumption into new spatial and temporal contexts on top of their typical weekly drinking patterns. However, there was resistance towards these practices from consumers, who stressed they were more likely to drink NoLos in place of alcohol and incorporate them into their existing drinking routines.

Conclusion: This paper expands a currently very limited evidence base and contributes directly to ongoing debates around ‘addition’ versus ‘substitution’ (i.e. whether NoLo products are being used on top of or in place of alcohol). Findings highlight both some of the challenges and opportunities of the expanding market, pointing towards the problematic presence of ‘addition marketing’ but also highlighting the ways consumers might challenge this and use NoLos flexibly to reduce consumption. As a result, NoLo promotion could function as one tool amongst many to help at least some consumers drink in moderation, alongside a broader package of measures such as education and wider social change.

Introduction

High-income countries such as the United Kingdom have been characterised as ‘cultures of intoxication’ where consuming alcohol is normalised and expected (Griffin et al., 2009). Drinking and participating in the bars, pubs and clubs of the Night Time Economy has become a key way to engage in contemporary consumer culture, construct identity and socialise within a neoliberal and late-Capitalist context (Parker & Williams, 2003). Yet in a seeming paradox, the ‘good’ neoliberal citizen is also required to embody self-control; to participate in consumer culture yet to consume with self-restraint and in the ‘right’ ways and make ‘healthy’ and future-focused choices (Rose, 1996). In relation to alcohol, this self-restraint is traditionally linked to the vague concept of ‘moderation’ (Green et al., 2007), with consumers instructed by the alcohol industry and public health messaging to drink

‘responsibly’ (Caluzzi et al., 2020).

In light of these mixed messages, it is perhaps unsurprising that consumers’ drinking patterns are changing across high-income countries. Alongside Australia, New Zealand, the USA and several other European countries, the UK has seen a recent decline in drinking rates, particularly amongst young people (Pape et al., 2018). Consumers are also presented with an increasingly diverse range of means through which to demonstrate their ‘responsible’ and ‘healthy’ relationships with alcohol. ‘Moderate’ drinking may be supplemented by participation in Temporary Abstinence Initiatives such as ‘dry months’ (Bartram et al., 2018), whereby participants are encouraged to reflect on their relationship with alcohol and showcase their ability to abstain from consumption for a defined period. At the same time, a growing number of online communities promote ‘mindful’ drinking and/or abstinence as positive lifestyle choices that bring health and wellbeing benefits and

^{*} Corresponding author at: Sociology Department, Law and Sociology Building University of York, Heslington East Campus, York YO10 5GD, United Kingdom.
E-mail address: emily.nicholls@york.ac.uk.

challenge entrenched drinking cultures (Davey, 2021). Finally, an expanding market of ‘no and low alcohol’¹ (NoLo) beer, wine and spirits may support consumers in their attempts to embody identities as responsible drinkers.

It is important to note that the overall market share of – for example – beer with an ABV percentage of less than 3.5 in the UK remains low (estimated at only 2.6% of the volume of all beers purchased during 2018) (Anderson et al., 2020). Previous research also suggests drinkers rate the appeal of a beverage as declining when it features labels such as ‘low’ or ‘light’ (Vasiljevic et al., 2018a), whilst a survey in 2019 indicated that only 3% of those who had never consumed a NoLo drink felt it was likely they would try one in the next 12 months (Corfe et al., 2020). As a result, NoLos may be unlikely to appeal to those sceptical of their taste or deliberately seeking intoxication (Miller et al., 2022). However, whilst NoLo products still only make up a very small percentage of overall alcohol sales, research suggests they *have* contributed to a reduction in the total number of grams of alcohol purchased by British households in recent years (Anderson et al., 2020; Kokole, 2021). The market is also continuing to expand; NoLo beer has recently been identified as one of the UK’s fastest-growing drinks trends (Robinson 2019, cited in Corfe et al., 2020), with sales increasing by 58% in 2019 compared to the previous year (Light Drinks, 2020). The diverse range of products now spans from those produced by small, independent NoLo-only breweries to alcohol-free direct equivalents of mainstream products produced by leading players in the alcohol industry.

Against this backdrop, the UK government has expressed an interest in exploring the role NoLos could play in improving public health, pledging in 2019 to work alongside the alcohol industry to increase NoLo availability and ‘nudge the general drinking population towards lower strength alternatives’ (HM Government 2019: 43). Action is certainly required to reduce the burden of alcohol harm; almost a fifth of England’s adult population drink at levels of ‘increasing’ or ‘higher’ risk (Brown et al., 2021) and 2020 saw a 20% increase in alcohol-specific deaths (Public Health England 2021).

However, the consequences of an expanding NoLo market and the implications for public health – both in the UK and more widely – remain unclear. Research in this area is limited (Rehm et al., 2016), presenting a mixed or speculative picture regarding the effects of the expanding market and its potential to reduce – or perpetuate – alcohol-related harm. There is a significant gap in our understanding of the ways in which NoLo products are branded and consumed, and this poses clear challenges in relation to policy, advocacy and regulation (Miller et al., 2022). The lack of evidence is of particular concern if the promotion of NoLos continues to be incorporated into future alcohol policy.

This paper directly addresses current gaps, drawing on the findings of a small-scale exploratory study into how NoLos are marketed and used by consumers to explore the extent to which (and ways in which) ‘addition’ and ‘substitution’ approaches are drawn upon in advertising and by NoLo drinkers. Whilst focusing on the UK, findings have relevance in other global contexts where NoLo markets are also expanding, and research in this field is emerging in contexts including Australia (Miller et al., 2022), Canada (Segal & Stockwell, 2009) and other parts of Europe (Porretta & Donadini, 2008). After introducing the addition/substitution debate and outlining the methodology for the project, this paper highlights examples of addition approaches adopted in NoLo marketing, but also indicates some of the ways in which consumers may resist these messages and incorporate NoLo consumption into their existing drinking practices.

Addition or substitution? Debates around the expanding NoLo market

As Anderson et al. stress, NoLos ‘can only be of public health benefit if they replace rather than add to existing consumption of higher strength products’ (2021: 2). To ensure policy is meaningful and can actually reduce harm, it is essential that research explores whether NoLos are used as substitutes for or in addition to alcohol. A ‘substitution’ model presents opportunities to reduce individual and population consumption levels and alleviate alcohol-related harm. For example, Segal and Stockwell (2009) suggest the expanding NoLo market in Canada could bring public health benefits (without jeopardising consumer satisfaction) whilst Vasiljevic et al. (2018b) note that the increased availability of low/er strength alcohol products in the UK at least has the *potential* to reduce overall levels of alcohol consumption, with associated health benefits. Whilst Corfe et al. (2020) are more sceptical about the potential of NoLos to support population-level change, they do acknowledge that incorporating NoLo products into existing drinking regimes could ‘significantly’ improve individual health outcomes. NoLo products may help consumers to have more alcohol-free nights, to drink less alcohol on a particular drinking occasion or to stop drinking alcohol for the short or long-term (Rehm et al., 2016) (for example during pregnancy). In this sense, the increasing availability of NoLos might be positive, offering consumers the choice to consume viable and desirable alternatives that do not pose the same health risks as alcohol (Schaefer, 1987) and possibly helping to normalise non-drinking and challenge embedded drinking cultures.

However, if NoLos are simply being drunk on top of one’s alcohol consumption (the ‘addition’ model), there is limited scope for alcohol related-harm to be reduced. Indeed, if ‘alcohol-adjacent’ products are being consumed in *new* settings (or advertised in this way) there is a potential for alcohol-related harm to be exacerbated as, ultimately, alcohol consumption may become more normalised in these settings. The increased presence of NoLos in and beyond drinking spaces may also reinforce social norms around drinking and perpetuate the notion that ‘everybody drinks’ because these products strongly resemble alcohol in appearance, smell and taste (Miller et al., 2022). NoLos might also be ineffective in supporting those most at risk of alcohol harm. For example, survey research by Corfe et al. (2020) indicates that 50% of NoLo drinkers admitted that drinking NoLos had not changed/reduced their overall alcohol consumption levels, with heavier drinkers more likely to say this. This suggests that high-risk drinkers who might benefit from swapping between NoLo and alcohol consumption could be the least likely to do so (and of course, this survey does not account for those who would be unwilling to drink NoLos at all). Emerging research also provides some evidence of addition marketing. This is designed ‘to encourage people to consume NoLo drinks at times and on occasions when alcohol would not normally be consumed’ (Corfe et al., 2020: 7), to encourage NoLos to replace soft drinks and to promote NoLo consumption on top of – rather than instead of – alcohol (Vasiljevic et al., 2019). Despite these concerns, the regulation of NoLo marketing and sales is limited and inconsistent.

Framing the debate around NoLos as a simplistic ‘addition’ versus ‘substitution’ binary has some limitations. Consumer practices are fluid and may change, rendering them difficult to capture in this neat either/or categorisation. Furthermore, it might sometimes be difficult to ascertain the exact degree of substitution taking place; NoLos might be a welcome option but not necessarily one that replaces alcohol on a drink-for-drink basis (for example some NoLos may be consumed in place of a soft drink). The notions of addition and substitution also fail to map onto the practices of non-drinkers, and do not fully capture some of the other concerns around NoLo marketing and consumption (such as the risk of NoLos functioning as a ‘gateway’ to drinking for young people). ‘Alibi’ marketing is also a concern (Purves & Critchlow, 2021), whereby NoLos can typically be advertised, promoted and sold without the same restrictions as their alcoholic counterparts (Porretta & Donadini, 2008),

¹ With an alcohol content ranging from 0.0 to 1.2% ABV (Department of Health & Social Care 2018), NoLos are designed to resemble alcoholic products in taste, appearance and branding.

thus potentially opening up new opportunities for companies to promote 'alcohol-adjacent' products and – by implication – their overall brand. This may be of particular concern in certain global contexts; for example, in parts of Australia where alcohol sales are not permitted in the main areas of supermarkets and grocery stores, the sale of NoLos in these spaces will likely considerably increase exposure to alcohol-adjacent products and alcohol brands. Similar issues emerge in France where the introduction of the Évin Law to prevent alcohol marketing in sport is already being circumvented by the use of general brand marketing (Purves et al., 2017). However, for the purposes of this paper, the addition/substitution debate represents a useful way to start to explore both marketing and consumption practices.

Methods

The findings presented are drawn from a small-scale, exploratory study into the ways in which NoLo products are marketed and consumed in the UK, funded by the Institute of Alcohol Studies (Nicholls, 2022). Full ethical approval was obtained from University of York and all institutional ethical guidelines followed.

Phase one: media analysis

The research included a media analysis of a specific marketing campaign and a sample of social media materials for two leading NoLo products. The first was the 0.03% ABV equivalent of a globally popular lager, and the second a <0.5% ABV non-alcoholic spirit. These brands were selected as both have launched major marketing campaigns in the UK in the last five years (in 2018 and 2020). They also represent leading (but slightly different) NoLo products with a growing global market that are both owned by leading players in the alcohol industry. The overall intention was to provide a 'snapshot' of both brand's specific marketing campaigns and their wider usage of social media. The main materials for both campaigns were initially identified through targeted Google searches for relevant webpages, videos/imagery, and news articles. A sample of specific campaign materials that reflected the broad messages of the respective campaigns was selected, and a second online search elicited further materials which helped to give a holistic picture of the ways in which the two products are promoted overall. The two campaigns provide a good overview of the ways in which the brands seek to position their products and the consumption cues or messages they share with consumers.

This was supplemented by an analysis of each brand's social media presence on Instagram, to provide further insight into product positioning and consumption cues and reveal a 'snapshot' of marketing material between 2018 and 2021. A sample of posts and images from each brand's Instagram account was pulled for analysis between 01/01/2018–31/01/2021 (incorporating both campaigns and 3 'Dry Januarys'). The lager does not have a dedicated Instagram account, but the account for the flagship alcoholic equivalent includes some posts promoting the NoLo version. Of the 300 posts during this period, 40 (13%) featured the NoLo lager. These were saved to a 'collection' on Instagram for later analysis. The spirit selected does have a dedicated Instagram account, and 532 posts were posted in the timeframe selected. To ensure parity across the two brands, systematic sampling was used to select every 10th post until a sample of 40 posts covering the relevant timeframe was obtained. Inclusion of social media was felt to be important as such marketing is difficult to regulate (World Health Organisation 2021) yet plays a key role in cementing social norms around drinking, encouraging pro-drinking attitudes and reaching those under the legal drinking age (Kaupila et al., 2019; Moewaka Barnes et al., 2016)). From across the campaign materials and Instagram accounts, a total of 110 posts, posters, images and videos were analysed, alongside the webpages for each product. Material was coded and subjected to both content analysis (for example categorising posts and hashtags) and thematic analysis (identifying patterns and wider themes across the

body of material). This was partly inductive (emerging from the data) and partly deductive (drawing on the research questions to facilitate their exploration). This initial analysis aided in the development of an interview schedule (see supplementary material one) for the second element of the research in two ways. Firstly, themes identified through the media analysis could then be explored during interviews. Secondly, specific examples of media materials from phase one were presented in interviews – in the form of 'moodboards' - to elicit participant feedback and prompt discussion.

Phase two: interviews

15 semi-structured, in-depth interviews were undertaken with UK-based drinkers and non-drinkers who had consumed NoLos at least three times within the last six months (in practice, participants tended to drink NoLos more frequently than this). Participants were recruited through social media (including Twitter, Facebook and Instagram) and dedicated online groups such as 'mindful drinking' community Club Soda. Seven participants identified as male and eight female. All resided in the UK and most were White British, but the sample also included participants from the Czech Republic, Australia and India. Ages ranged from 22 to 68, with three participants in their 20s, six in their 30s, four in their 40s and three in their 50s or 60s. Participants were asked to self-identify their social class at the start of the interview. Whilst the British class system is broadly grouped into working, middle and upper-class, pre-defined categories were not provided and this was asked as an open question as the self-identification of participants can be as illuminating and interesting for researchers as utilising more 'objective' measures to measure or calculate class. Nine participants self-identified as middle-class, the remaining as working class or 'do not identify with a class'. The middle-class bias was likely compounded through the snowball and social media recruitment that was necessary when undertaking this research during the COVID-19 pandemic, but likely also reveals something about who is primarily consuming NoLos (Anderson et al., 2021).

At the time of the research, six participants identified as 'former drinkers' who exclusively drank NoLos. Of the drinkers, three participants had stopped drinking for a short-term, defined period (for example due to pregnancy or a 'health kick') but did plan to continue incorporating NoLos into their drinking routines once alcohol consumption resumed for them again. The remaining drinkers could be defined as 'hybrid' consumers who regularly consumed both alcohol and NoLo products. Participants actively drank NoLos to help to cut down their overall alcohol consumption but also strategically on occasion, for example to avoid a hangover. No participants were lifelong non-drinkers, and none were in recovery or had received treatment from alcohol support services.

Participants were supplied with a Project Information Sheet and gave full written consent, and data was anonymised and pseudonyms assigned. Interviews allowed for the collection of rich and in-depth data and explored participants' (non)drinking biographies and histories and how and why they drank NoLo drinks. No incentives were provided, although many appeared to enjoy the opportunity to share their experiences and their knowledge of NoLo products. All interviews were conducted online and lasted 45–90 minutes. Videos were turned on during interview but only audio was recorded. This was then transcribed and data was subjected to coding and thematic analysis (Braun & Clarke, 2006), again drawing on both an inductive and deductive approach (Joffe, 2012), and building on themes identified in the media analysis. Analysis was an iterative process, with the coding and analysis from phase one again revisited upon completion of phase two. Finally, themes spanning and cutting across both modes of data collection were highlighted as all data was considered collectively.

Findings

'Bring your beer to work': addition marketing in NoLo promotion

Across the social media and marketing campaigns there was clear evidence of addition marketing. Indeed, the entire premise of the lager marketing campaign hinged on creating new 'beer moments' where consumers could drink a product resembling alcohol in unexpected or novel settings. The campaign was explicitly centred on encouraging the consumption of NoLo products in contexts where alcohol consumption was prohibited or discouraged (including in a board meeting, at the gym and behind the wheel of a parked car). Other materials encouraged consumers to 'bring your beer to work', to combine NoLo consumption with yoga classes and other exercise and to enjoy a drink at times where traditionally 'you couldn't have a beer'. Whilst it should be acknowledged that both brands did make some effort to associate their products with fun, sociability and connection (thus perhaps resisting traditional depictions of non-drinkers as 'boring' or 'excluded' (Herman-Kinney & Kinney, 2013), fewer than one in ten of the social media posts depicted the lager being consumed in a traditional social drinking environment such as a pub. This provides further cues to consumers around where, when and how they might be expected to drink – or *not* drink – the product (and implicitly reinforces the message that traditional drinking spaces are still reserved for alcohol). In this way, there was a spatial expansion of the contexts in which alcohol or an alcohol-adjacent product might be consumed, as suggested in previous research (Miller et al., 2022). This message was clearly identified by participants:

[The campaign message is] "Don't order this [NoLo] in a pub, order our normal beer, this is for when you can't get to a pub" (Jacqueline, 68)

Here Jacqueline explicitly positions NoLos as something to be consumed outside of licenced venues, with an expectation that so-called 'normal beer' will be the beverage of choice once the consumer can 'get to a pub'. Through opening up new opportunities to drink in this way, companies may promote consumption patterns that exacerbate alcohol harm through normalising the consumption of products like alcohol (and ultimately alcohol itself) in new contexts (Corfe et al., 2020). However, participants were sceptical of marketing material showing NoLo consumption in settings such as the gym or workplace, describing this as 'weird' (Suzanne, 52) or 'not a real-life context or scenario' (Zara, 42). They also stressed these examples did not reflect the ways in which they wanted to use NoLos:

I don't want to *introduce* it into new places in my life. I want it to be in place of alcohol... They are saying, "Have this as well as alcohol in different situations." That isn't what I want to do (Hannah, 30)

Here, Hannah resists the narrative of creating *new* 'beer moments'; she recognises the marketing move to encourage addition but explicitly stresses she wants her NoLo consumption to be 'in place' of rather than 'as well as' alcohol. Along with other participants, she also expressed frustration at the lack of representation of NoLos in typical drinking settings across marketing materials. Participants felt that showing NoLos being drunk in bars and pubs could help to normalise NoLo consumption and would better reflect the ways in which they used them. It is worth noting, however, that participants tended to unintentionally place NoLos below alcohol in a hierarchy of drinks, slipping into using language such as 'knock-off', 'fake' or 'pretend alcohol' to describe NoLos. This suggests that at least some of the messaging around NoLos (positioning them as inferior to a 'proper' drink or as products to be consumed when it is not possible or acceptable to consume 'the real thing') may be filtering down and internalised, even by enthusiastic NoLo drinkers.

A temporal expansion of consumption opportunities was also observed; NoLo lager was promoted as a product to be consumed at times when alcohol might be avoided, including the night before a 'big

day' or on a weeknight. Similarly, drinking NoLos at any point during the day was encouraged, mirroring Vasiljevic et al.'s (2019) findings around the promotion of 'lunchtime drinking' in relation to NoLos. This was again resisted by participants. Luke (29) suggested 'I would still stick to what I would previously deem to be acceptable drinking times', whilst Emma remarked:

Saying "any time of the day you can have a drink", I don't think people would? I know how we drink and I wouldn't sit down on my lunch break and pour myself a NoLo... The temporal rhythm of the drinking is still the same. Like, you have it at the same time. It's just a replacement for your alcohol... that's how it would be for us. I would feel really wrong having that at midday on a Monday (Emma, 31)

Here, both participants have a clear sense of socially acceptable drinking times and want to confine their NoLo consumption to these windows. Like Hannah and other participants, Emma also sees NoLos as a *replacement* for alcohol and positions times such as weekday lunch breaks as the 'wrong' context in which to consume a NoLo.

Other marketing posts promoted NoLos as a tool to help consumers 'get through' a short-term period of abstinence such as Dry January, reflecting wider moves amongst alcohol marketing to tap into Temporary Abstinence Initiatives (TAIs) (Kauppila et al., 2019). The temporary nature of NoLo use was emphasised through the promotion of NoLos as something to make the 'challenge' of that 'last weekend' of Dry January easier, for example. This implicitly reinforces messages that abstinence is something that is not just difficult but also short-term, with a resumption of 'normal' drinking practices expected upon completion.

Patterns of NoLo consumption: hybridity, moderation and substitution

Whilst participants expressed negative views towards addition marketing, on balance they saw the expansion of the NoLo market as a positive development. The increasing presence of credible, desirable NoLo options was felt to be 'inclusive' (Georgie, 22) and provide 'choice' (Christiaan, 41) and 'alternatives' (Nina, 45). NoLos were associated with a number of benefits including; no risk of feeling tired, hungover or unproductive the next day, fewer physical health risks than alcohol, less effect on mood and anxiety than alcohol and reduced calories without having to compromise on taste and 'experience'. Non-drinkers also explained how NoLos supported their sobriety and some admitted it would be more difficult to stay sober without NoLos; for example Rob (34) credited NoLos with helping him to maintain sobriety during 'difficult' periods.

The drinkers in the sample commonly adopted what Pete (38) called a 'hybrid' model. This typically included explicit attempts to replace alcohol with NoLo options in certain contexts. As Rehm et al. (2016) argue, switches amongst drinkers to NoLo alternatives on some occasions may be a useful way to reduce overall consumption (and ultimately reduce alcohol-related harm). Whilst examples of co-consumption of NoLos and alcohol in a single drinking session were rare, participants discussed using NoLos to limit their alcohol consumption on particular nights of the week (such as weeknights) or in certain locations (such as the home). For example, Christiaan (41) described exchanging alcohol for NoLos at home as did Liam (26), whilst Hannah had historically switched to drinking NoLos during the week:

When I was trying to cut back on alcohol mid-week, I would be like, "Right, I am not going to drink Monday to Thursday," say... But on an evening sometimes, I fancied a different drink to what I would drink during the day. Just to differentiate between day, work, and the evening. So if I were drinking mid-week, then I would be like, "I'll have an alcohol-free one, because then you are not really drinking" (Hannah, 30)

Here, Hannah describes actively and strategically using NoLos as a tool to 'cut back' on midweek drinking (interestingly, at the time of interview she had recently stopped drinking completely but continued

to regularly consume NoLos). Ed also described adopting a 'hybrid type of model' where NoLos supported him in finding a 'happy medium' in his relationship with alcohol:

It is finding that sort of happy medium. I do enjoy drinking and ... [cut]... I still think that alcohol has got a place, but alcohol-free booze helps me manage that a lot better because... [cut]... It can... not get out of control, but your use can increase without you really realising it... something about it that just suddenly creeps up on you, and you realise you have been drinking too much or whatever. So I think that alcohol-free drinks definitely have got a massive role to manage that (Ed, 42)

Ed is mindful here of some of the challenges of moderate drinking and the ways in which alcohol consumption can 'creep up'; he stresses in the interview the importance of 'managing drinking' and being 'moderate' in one's consumption (with NoLos potentially playing a 'massive role' in supporting that). Hannah and Ed's framings of 'cutting back', 'moderation' and 'management' tie into wider neoliberal discourses of 'responsible consumption' (Caluzzi et al., 2020) and ideas of the 'good' consumer. This was echoed by other participants who positioned their own consumption in this way and stressed the importance of self-control and taking personal responsibility for one's alcohol intake, health and wellbeing (Room, 2011).

In contrast with the messages of addition marketing – which emphasise that NoLo consumption is a temporary or short-term solution – participants also felt that incorporating NoLos into drinking regimes could be a longer-term choice to facilitate a balanced and sustainable relationship with alcohol into the future. For example, Liam (26) describes a hybrid approach as a model that allows him to consume alcohol at a level he is 'comfortable with', and also as something he is going to 'maintain for quite a while', thus explicitly positioning his current consumption levels as sustainable and long-term.

Participants also stressed that they explicitly wanted their NoLo usage to mirror the ways in which they drank alcohol. This is evident in the quote from Hannah above, where NoLos mark the transition to the end of the working day, a role traditionally reserved for alcohol (Caluzzi et al., 2022). She also stressed she wanted NoLos to feel like a 'special' drink like alcohol, and others talked about drinking NoLos in typical drinking contexts to feel included and 'share in the experience' (Pete, 37). Fitting in within existing drinking contexts was much more important for participants than introducing NoLos into new drinking contexts, challenging the premise of addition marketing and suggesting that this material may neither shape nor reflect consumer practices.

Discussion and conclusion

These findings highlight the ways in which the expanding NoLo market may present challenges and opportunities in relation to public health. On the one hand, addition marketing can clearly be identified in the NoLo marketing material analysed for this study. On the other, consumers may resist or challenge these messages and instead talk about the ways in which they flexibly incorporate NoLos into their existing drinking regimes and use them as a tool to reduce their overall alcohol consumption.

Turning firstly to addition marketing, the clear message here is that NoLo consumption may be a *temporary* option in certain contexts and at certain times but should not encroach upon one's usual drinking practices and can sit neatly on top of one's existing alcohol consumption. In attempts at both spatial and temporal expansion, in the materials analysed NoLos were promoted as products to be consumed in new and novel locations and at different times. NoLo consumption was also depicted as a short-term measure, with an expectation that 'real' alcohol can be consumed again shortly and that traditional drinking spaces and contexts are still reserved as spaces for alcohol consumption. NoLo producers – particularly existing alcohol brands – may have a vested interest in adopting this model, as a substitution approach could impact

negatively upon overall alcohol sales (see Vasiljevic et al., 2018b). The intention here is not to support a long-term, sustained move towards NoLos amongst consumers but to – in the words of one participant – 'expand the market rather than getting drinkers to switch' (Suzanne, 52). There was also some emerging evidence that consumers are internalising messages around NoLos as 'inferior' or lesser products, suggesting the creation of a 'hierarchy' of drinks which is only reinforced through addition marketing that positions NoLos as a temporary option to be consumed only when the 'real thing' is not available or permitted. Arguably, marketing should be subject to greater regulation to limit such messages. Of course, restrictions on marketing may be challenging to implement in practice in contexts such as the UK where alcohol marketing is loosely monitored and largely self-regulated by the industry (Noel et al., 2017).

However, there was also evidence that consumers may express scepticism towards addition marketing and the notion of creating new drinking occasions. In this study, there was no evidence of NoLos being consumed on top of existing alcohol consumption, despite this finding being reported elsewhere (Miller et al., 2022). Rather, participants wanted to use NoLos in ways that resembled or replaced (some) alcohol consumption; for example in drinking contexts with friends. The examples from the data suggested participants were not introducing NoLos into new contexts and situations; rather they were responding to traditional consumption cues and using NoLos to feel included in traditional drinking contexts or to mirror familiar drinking patterns. In this way, NoLo usage might help those who are not drinking to 'fit in' and challenge assumptions that alcohol consumption is associated with fun, sociability and connection (Bartram et al., 2017) whilst non-drinking (even temporarily) is 'boring' and a source of exclusion (Herman-Kinney & Kinney, 2013). Having said this, it is interesting to note that NoLo products are still designed to resemble alcohol and it may still be easier to 'fit in' if a product that looks, smells and tastes similar to alcohol is being consumed.

NoLos were also felt to promote choice for both non-drinkers (who felt that having access to a range of NoLos supported them in both long and short-term efforts at sobriety) and drinkers. Whilst there is some concern that NoLos might trigger relapse for former drinkers who are in recovery (Corfe et al., 2020), others experimenting with short or longer-term abstinence may find NoLos a useful tool in starting and maintaining sobriety, as indicated both in the data here and in earlier research (Nicholls, 2021). Current drinkers in the sample also felt NoLos supported them in developing long-term, sustainable and moderate relationships with alcohol (see Rehm et al., 2016). There was evidence of substitution, whereby NoLos were directly replacing alcoholic drinks to help participants develop a balanced relationship with alcohol. The strategic incorporation of NoLos into participants' drinking routines was regarded as positive, helping them to control and manage their drinking levels and make future-focused choices.

Public health messages may benefit from considering the strategies that are already being used by moderate, low and non-drinkers or those who have made a change in their relationship with alcohol (Herring et al., 2014), including hybrid drinkers of alcohol and NoLos. For example, drawing on the findings presented here, campaigns might encourage hybrid consumption models or provide more explicit illustrations of what hybridity/moderation could look like in practice. This could include switching to NoLos instead of alcohol during the week or at home in order to reduce overall consumption levels. These represent tangible and practical measures that may be more useful than – for example – vague calls for consumers to drink 'responsibly' or adhere to weekly unit guidelines (which may feel abstract or difficult to follow) (Green et al., 2007). 'Hybrid' or 'flexible' drinking models do not require consumers to count units but rather to set personal guidelines that work for them in terms of their consumption and may ultimately help to encourage more moderate consumption in other contexts in the future (Conroy & de Visser, 2018).

Participants also enthusiastically identified benefits of NoLo

consumption including lack of hangovers and fewer impacts on mental and physical health; public health campaigns might benefit from further emphasising the benefits of reduced consumption, moving away from a traditional focus on the negative consequences of drinking that attempts to change practices through mobilising feelings of concern, guilt or worry over drinking levels (Yeomans, 2019). Traditional campaigns that encourage short-term sacrifice and 'deprivation' (through reducing consumption) for long-term gain (such as improved health) miss an opportunity to position non-drinking/more moderate drinking as a rewarding experience in and of itself and to consider how gains or benefits might be experienced in both the long and short term (Yeomans, 2019).

However, the capacity of an expanding NoLo market to reduce alcohol-related harm will remain limited if significant proportions of the population do not see them as a viable option. Whilst participants were enthusiastic about NoLos, the self-selecting nature of the sample means the data reflects the views of active – and at times passionate – NoLo drinkers who have opinions about these products that they wanted to share. These views do not necessarily reflect those of the wider population or capture the experiences of those who might be using NoLos but also drinking very heavily. In this sense, the experiences of those most affected by alcohol harms or with potentially very difficult relationships with alcohol are not reflected here, and the promotion of NoLos represents at best a partial solution to the pressing issue of alcohol harm that must be undertaken alongside wider measures. This is particularly important if – as emerging evidence suggests – the highest risk or heaviest drinkers are not reducing their alcohol consumption even if/when they start to consume NoLos (Corfe et al., 2020).

It should be acknowledged that this is a small-scale, exploratory study designed to start to address a gap in current research and is unable to offer a comprehensive picture of NoLo marketing and consumer practices. Whilst these findings may also have resonance in other global contexts where drinking is declining and the NoLo market expanding – including Australia (Miller et al., 2022), Canada (Segal & Stockwell, 2009) and other parts of Europe (Porretta & Donadini, 2008) – it is important to note that the decline in drinking is not universal and the alcohol industry may be responding to drinking declines in some countries with attempts to more assertively market alcohol in middle and low-income countries (Walls et al., 2020). The two product case studies also represent only a snapshot of practices around the promotion of NoLos. Likewise, the interview data reflects a snapshot in time of the perspectives of a small sample which, despite some diversity in gender and age, is not representative when class or race/ethnicity are considered.

Returning to the UK government's intention to increase NoLo availability by 2025 and nudge the public towards lower-strength options, it is possible that further expansion of the NoLo drinks market may contribute to the reduction of alcohol-related harms and help support moderate, flexible and 'hybrid' approaches to drinking amongst some consumers. However, any attempts to expand this market should take place against a backdrop of adequate regulation of NoLo marketing, and an awareness that NoLos still represent a very small segment of the overall alcohol market, do not appeal to all consumers and may not always be used as a substitute for alcohol. In sum, the pledge to increase NoLo consumption by the UK government must be considered as only one element of a broader portfolio of strategies to lessen the significant burden of alcohol harm on individuals and communities.

Ethics approval

The authors declare that they have obtained ethics approval from an appropriately constituted ethics committee/institutional review board where the research entailed animal or human participation.

This study was approved by the University of York Economics, Law, Management, Politics and Sociology Ethics Committee (ELMPS) in June 2021. All participants provided written informed consent prior to

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Declaration of Competing Interest

The authors declare that they have no known competing financial interests or personal relationships that could have appeared to influence the work reported in this paper.

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Supplementary materials

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