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The Marketing and Consumption of No and Low Alcohol Drinks in the UK

Dr Emily Nicholls

University of York

Report for the Institute of Alcohol Studies, March 2022

IAS Institute of Alcohol Studies

"You can be a hybrid when it comes to drinking"

The Marketing and Consumption of No and Low Alcohol Drinks in the UK

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Executive Summary

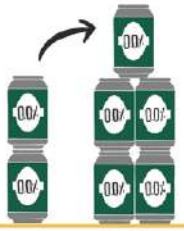
This report examines how No and Low Alcohol (NoLo) beverages are marketed and promoted in the UK and explores how and why consumers drink them. Whilst a more nuanced understanding of the expanding NoLo market and changes in drinking practices is important for policy and public health debates, this topic remains under-researched. The report adds to the evidence base on NoLo consumption in the UK through interviews with drinkers and non-drinkers alongside an examination of marketing and social media outputs for two popular NoLo drinks (Heineken 0.0 and Seedlip).

The examination of marketing materials found that strategies used to promote NoLos include opening up new contexts and times to drink (addition marketing), selling lifestyles and identities and sports marketing/sponsorship. These techniques draw – at times implicitly - on health messages and gendered stereotypes regarding drinking. The interviews found that drinkers and non-drinkers value the increased availability of NoLo drinks and incorporate them flexibly into their own (non)drinking routines. Perceived benefits included both those that come from NoLos being like alcohol as well as those that stem from NoLos being distinct from alcohol. Participants shared some negative perceptions about the ways in which these products are promoted, including the risks of alibi advertising and addition marketing. Whilst there *was* evidence of the addition approach in marketing, this was not reflected in participants' practices and there was resistance to the idea of creating new drinking occasions for NoLo consumption. Rather, participants wanted to drink NoLos in traditional drinking settings in place of alcohol.

Expansion of the NoLo market may bring challenges, but the potential role of NoLos in supporting moderate drinking for some consumers should not be disregarded. There was evidence of problematic marketing practices that may perpetuate alcohol-related harm, such as addition marketing and alibi marketing, and NoLos may be promoted in ways that reinforce social norms around (a) drinking and gender, and (b) alcohol consumption more widely. However, there may be a disconnect between addition-based marketing strategies and everyday (non)drinking routines, as consumers may use NoLos as a substitute for alcohol or regard them as a tool to support a flexible or 'hybrid' model of moderate drinking. It may be possible to encourage such practices more widely, although this should take place against a backdrop of adequate NoLo marketing regulation. It is also important to note that these products currently represent a very small segment of the overall alcohol market, potentially limiting opportunities for meaningful reductions in alcohol-related harm at a population level.

NOLOS - IMPROVING OR WORSENING ALCOHOL RELATED HARM?

THE CHALLENGE



The NoLo (no and low alcohol) drinks market is **growing**.

But evidence around whether this expanding market is a good thing, or could help improve public health, **is very limited.**

Alongside this, the UK government is exploring the role that NoLos might play in **improving public health**, pledging to work alongside the alcohol industry to increase NoLo availability by 2025.

Emily Nicholls from the University of York, funded by the Institute of Alcohol Studies, set out to **investigate how NoLo drinks are marketed and consumed in the UK.**

THE RESEARCH

The research **investigated the latest campaigns and marketing** materials of two prominent NoLo brands: Heinken 0.0 and Seedlip spirits; and conducted **semi-structured interviews with 15 drinkers and non-drinkers who consume NoLos.**

NoLo marketing uses **problematic strategies,** including:

- addition marketing encouraging people to drink NoLos on top of - not instead of - usual consumption;
- stealth marketing, or promoting the alcohol brand as a whole.

NoLo campaigns also:

- reinforce stereotypes around gender and drinking
- continue to position drinking as the norm
- make health claims or associations that may be confusing for consumers.

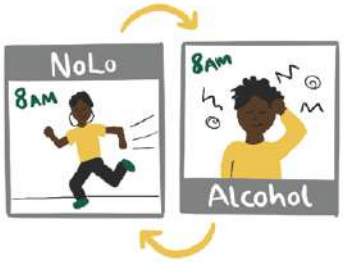
However, consumers are **aware of and skeptical of these strategies** and don't feel the 'addition' approach describes how they actually use NoLos.

Drinkers and non-drinkers value the availability and flexibility of NoLos, with drinkers often adopting a 'hybrid' model for using them e.g. drinking NoLos during the week or at home and alcohol at the weekend or when going out.

POLICY RECOMMENDATIONS

NoLos could help to ease alcohol-related harm **by offering an alternative, but also exacerbate it through unregulated marketing** and the promotion of drinking norms.

Review and potentially restrict NoLo marketing.



Incorporate NoLos in current public health campaigns around alcohol by **positioning them as practical strategies to reduce weekly units and promoting the immediate beneficial effects** of drinking NoLos for mental and physical health.

There is a place for NoLos, but they must be regulated and marketed mindfully.

To find out more, contact Lead Researcher Dr Emily Nicholls: emily.nicholls@york.ac.uk

A Note on Terminology

In the UK, the definitions around 'no alcohol', 'low alcohol' and 'alcohol free' are contested and may be unclear to consumers, with government guidelines stating that to qualify as 'alcohol free' (AF) a product should have an ABV of 0.05% or less (Department of Health and Social Care 2018). However, several products marketed in this category have an ABV above 0.05%, and so the term used in this report is 'no and low alcohol' (NoLo) to capture products with an alcohol content ranging from 0.0 to 1.2% ABV, in line with DHSC guidelines (Department of Health and Social Care 2018). The DHSC recommends the term 'de-alcoholised' for products with an ABV between 0.5 and 1.2% ABV but this term is not used within this report as it is not widely used in the marketing and promotion of NoLo products or by consumers.

The term 'NoLo' – although catching on in popular media and used in some academic research – was employed infrequently by participants, who used the term 'alcohol free' in interviews and included products with an ABV above 0.05% in this category. Participants made no distinction between the two case study products covered in the interview in terms of categorisation and discussed them alongside other products without making distinctions around 'low' or 'no' alcohol categories. Whilst the use of the term 'alcohol free' as a catch-all by participants may have been informed by the use of this term – rather than 'NoLo' - by the researcher, it may also highlight that public understanding of the nuances of the different definitions for no and low alcohol products is limited.

Introduction

'NoLo' – a growing market

Valued at over £115 million in 2019 (Light Drinks 2020) in the United Kingdom, the 'no and low alcohol' (NoLo)[1] drinks market is expanding. NoLo beer has recently been identified as one of the 'fastest-growing drinks trends in the UK' (Robinson 2019, cited in Corfe et al. 2020), with sales increasing by 58% in 2019 compared to the previous year (Light Drinks 2020)[2]. Several leading players in the alcohol industry now offer a NoLo option alongside their 'flagship' alcohol product(s); these are often branded in similar ways to their alcoholic counterparts and are increasingly the subject of dedicated marketing and promotional campaigns. Decisions to diversify into NoLos may be - at least in part - a response to wider shifts in drinking rates, including international declines in youth drinking over the last 20 years (Pape et al. 2018). Research suggests almost 60% of UK drinkers have tried NoLos (Portman Group 2020) with evidence indicating that despite retaining a small share of overall alcohol sales, new NoLo and 'light' products 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).

Against this backdrop, the UK government has expressed an interest in exploring the role that NoLos might play in improving public health, pledging to work alongside the alcohol industry to increase NoLo availability by 2025 and 'nudge the general drinking population towards lower strength alternatives' (HM Government 2019: 43)[3]. With harmful levels of alcohol consumption causing 5 million deaths globally per year and contributing to over 200 health conditions (World Health Organisation 2018), action to reduce alcohol-related harm remains a global priority. According to the Alcohol Toolkit Survey, over 18% of England's adult population were drinking at levels of 'increasing' or 'higher' risk in November 2021 (Brown et al. 2021), with Public Health England (Anderson et al. 2021a) estimating there were 600,000 'dependent drinkers' in England in 2019. The economic and social burden of alcohol harm was estimated at 1.3%-2.7% of annual UK GDP (£21-£52 billion) in 2016 (Burton et al. 2016). This figure is likely to have increased in recent years with – for example – a 20% increase in alcohol-specific deaths in 2020 during the global COVID-19 pandemic (Public Health England 2021b).

Implications of an expanding NoLo market

Research into the ways in which NoLo products are branded and consumed remains limited (Anderson et al. 2021), and the consequences of the growing NoLo market remain unclear. There is no strong evidence base to indicate that an expansion of the NoLo market would reduce alcohol-related harm, and some researchers have expressed concern that the expanding market could even exacerbate harm. For example, NoLo products can be advertised, promoted and sold without the same restrictions as their alcoholic counterparts (Porretta and Donadini 2008), and the regulation around NoLo marketing in the UK is limited and inconsistent (Corfe et al. 2020). As a result, researchers highlight possible risks of 'alibi' marketing (Murray et al. 2018; Purves and Critchlow 2021), which allows companies to circumvent existing regulation to promote their NoLo offerings – and by stealth their alcoholic products and their wider brand - in new contexts or to new audiences (de Bruijn et al. 2012). For example, previous research suggests that Thai alcohol companies strategically use similar branding in

1 NoLos have an alcohol content ranging from 0.0 to 1.2% ABV (Department of Health and Social Care 2018)
2 Although it is important to note that NoLo beers, for example, make up a very small proportion of overall beer sales (Anderson et al. 2020)
3 See Bryant (2020) on the use of 'nudge' tactics by the UK government in relation to alcohol policy

the promotion of their alcoholic and soft drinks, with young people associating brands with the 'flagship' alcoholic product regardless of what is being advertised (Kaewpramkusol et al. 2019). This may help to encourage allegiance to particular brands, including amongst consumers under the legal drinking age.

A further concern is around the ways in which the alcohol industry may be identifying wider trends towards 'healthism' amongst consumers (Keric and Stafford 2019) and making both direct and indirect health claims through NoLo marketing (de Brujin et al. 2012; Porretta and Donadini 2008). NoLo products may have fewer calories and contain less sugar than full-strength drinks (Mellor et al. 2020), which could be seen as potentially reducing harm (comparisons may be drawn here with the development of the 'low/no sugar' or 'diet' carbonated drinks market (White et al. 2014)). However, the marketing and promotion of NoLos also raises questions about how allegiance to brands is encouraged and how 'healthy' these products might actually be. In a scoping review of previous research on the health benefits of NoLo drinks, Anderson et al. (Anderson et al. 2021a) report that the evidence is limited, with the majority of the studies reporting health benefits funded by the alcohol industry. Research also suggests consumers themselves are likely to express confusion and uncertainty about the health implications of products such as light beers (Niva et al. 2013) or assume they are healthier than regular alcoholic drinks (Chrysochou 2014). This may lead to a 'self-licensing effect' (whereby consumers feel that they are making a 'virtuous' choice so consume more drinks or alcohol overall than they would if drinking higher-strength products) (Shemilt et al. 2017).

The marketing of NoLo beverages may also continue to uphold particular social norms around alcohol consumption. Research suggests that alcohol marketing glamourises alcohol (Gallage et al. 2020), upholds social norms that link alcohol with fun/sociability, sexual success or relaxation (Szmigin et al. 2011) and normalises daily consumption (Nicholls 2012) despite regulation designed to prevent this. The increasing promotion of alcohol across social media has also been found to be particularly effective in cementing social norms around drinking, encouraging pro-drinking attitudes and reaching those under the legal drinking age (Kauppila et al. 2019), with online advertising difficult to regulate (World Health Organisation 2021). It is important to consider whether parallels exist between the marketing of alcoholic beverages and their NoLo counterparts. The presence of NoLo drinks in traditional drinking spaces may also reinforce social norms and expectations around drinking and perpetuate the notion that 'everybody

drinks' because these products strongly resemble alcohol in appearance, smell and taste (Miller et al. 2021). Previous research also recognises the ways in which alcohol marketing is gendered (de Bruijn et al. 2012). For example, beer is bound up with masculinity, sport (Gee and Jackson 2012) and with 'having a laugh' and sociability (Szmigin et al. 2011). Other beverages such as wine or cocktails may be associated with femininity or female friendships (Atkinson et al. 2019; Lyons and Willott 2008), and 'feminised' marketing campaigns have specifically targeted women (Atkinson et al. 2022; Jones et al. 2018). Research has to date not considered whether these gendered stereotypes are mirrored in NoLo marketing.

Finally, there is some evidence to suggest that NoLos are being marketed or advertised as drinks to be consumed in addition to one's usual consumption patterns. For example, Vasiljevic et al. (2018a) consider the marketing messages used for regular and low strength alcohol products on supermarket and producer websites in the UK and suggest that NoLos are typically promoted as drinks to replace soft drinks or be consumed in addition to – rather than instead of – alcohol. Corfe et al. (2020) also report that NoLos are shown in marketing material in contexts in which alcohol would not normally be consumed and at times when one would not usually drink, positioning them as products to consume 'in addition' to alcohol rather than a 'substitute'. Some research indicates consumers may echo this by suggesting NoLos are designed for lunchtime consumption or for groups such as pregnant women (Vasiljevic et al. 2019). If NoLos are used in these ways, it is unlikely that alcohol-related harm will be reduced; NoLos 'can only be of public health benefit if they replace rather than add to existing consumption of higher strength products' (Anderson et al. 2021: 2).

It is also important to understand the ways in which marketing messages are received by consumers and how they use NoLos in their own (non)drinking routines. Again, research discussing consumer practices has centred around an 'addition' versus 'substitution' model, with Miller et al. (2021) suggesting that substitution is unlikely to be an appealing option for those deliberately seeking the effects of alcohol. Survey research by Corfe et al. (2020) also indicates that 50% of NoLo drinkers admitted that drinking NoLos had not changed their overall alcohol consumption levels (with heavier drinkers more likely to say this). However, further research is required, and whilst addition marketing may be used as a specific advertising technique, this may not reflect the ways in which consumers are using NoLos[4]. The increasing availability of NoLos might be regarded as a progressive development, offering consumers the choice to consume viable alternatives to alcohol in settings where they might usually drink. The substitution model should not be disregarded, with Vasiljevic et al. (2018a) suggesting that the increased availability of low/er strength alcohol products does have at least the potential to reduce overall levels of alcohol consumption. NoLo products may help consumers to have more alcohol-free nights, to stop drinking alcohol for the short or long-term or to drink more moderately / consume fewer units overall (Rehm et al. 2016). Early research suggests NoLo drinks do not pose the same health risks as their alcoholic counterparts (Schaefer 1987) and Corfe et al. (2020) acknowledge that the consumption of NoLo products could make a difference to health outcomes for individuals (although they are less optimistic about the possibility for population-level change). Segal and Stockwell (2009) also argue that the expansion of the NoLo market could be a positive development that brings public health benefits without jeopardising consumer satisfaction. The increasing presence of visibly NoLo products – particularly in traditional drinking settings – may also help to normalise their consumption, provide

4 Anderson et al. (2020) suggest there is some evidence sales of NoLo products are replacing- rather than simply adding to - sales of stronger beers, although their definition of 'NoLos' includes products up to 3.5% ABV which might be better classified as 'lighter beers'

alternatives to alcohol that are seen as credible and appealing, or challenge embedded 'cultures of intoxication' (Griffin et al. 2009) whereby drinking and drunkenness are expected.

Gaps in the evidence base

As suggested above, the consequences of an expanding NoLo market and the implications for public health remain unclear. Research to date 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. As Miller et al. (2021) acknowledge, this lack of understanding poses challenges for policy and regulation. Further research is required to consider: how NoLo products are being marketed and consumed in different global contexts, whether – and if so how – this might challenge or reinforce social norms and expectations around drinking, and how this expanding market might reduce or perpetuate alcohol-related harms.

The report presents the findings of a research project that explores these issues in a UK context via the following research questions:

1. How do Heineken and Seedlip market and promote their NoLo products, and how are these messages received by consumers?
2. How do consumers incorporate NoLo products into their own social / drinking practices?
3. In what ways do these marketing campaigns and consumer practices draw on 'health claims' and reinforce or challenge dominant social norms around (a) gender and drinking, and (b) alcohol consumption more widely?
4. What are the implications of findings for policy debates, including ways in which the expansion of the NoLo market might reduce or perpetuate alcohol-related harm?

Methodology

Methodology Part One: Media analysis case studies

Rationale and choice of products

Two prominent NoLo beverages were selected as case studies to explore how NoLos have been marketed in recent campaigns and through social media. Consideration was given to identifying popular products that are owned by key players in the alcohol industry (Heineken and Diageo)[5], represent a significant and growing section of the UK market and have been the subject of recent marketing campaigns with different target audiences.

Heineken 0.0 – 2018's 'Now You Can' Campaign

Launched in 2017, Heineken 0.0 is a beer produced by Heineken (whose flagship product is a 5% ABV Dutch lager) which technically qualifies as 'alcohol free' (ABV 0.03%). Heineken 0.0 is the subject of the UK's largest marketing campaign to date for a NoLo beer (beertoday 2018): the 2018 *'Now You Can'* (NYC) campaign. By 2019 it was the second best-selling NoLo beer in the UK and the most rapidly growing in terms of volume sold and value (Stone 2019), with the largest off-trade sales growth in the UK (Statista 2019). The NYC UK campaign was preceded by the 2017 'open to all' campaign (featuring a runner, a woman doing yoga and a man doing DIY drinking NoLo beer) and a specific campaign around drink-driving tied into Heineken's sponsorship of Formula One motor-racing.

Seedlip – 2020's 'Drink to the Future' Campaign

Seedlip – a self-styled 'distilled non-alcoholic spirit' (Diageo 2020) - was launched independently in 2015 but alcohol company Diageo became majority shareholders in 2019. NoLo spirits represent a newer addition to the market than beers (Lachenmeier et al. 2016) and, with an ABV of less than 0.5%, Seedlip qualifies as 'de-alcoholised' or NoLo rather than 'alcohol free'. Seedlip launched its first major UK marketing campaign in 2020 (McGonagle 2020) – the *'Drink to the Future'* (DTTF) Campaign - and claimed a 270% year-on-year volume growth in sales in 2019 (Hancock 2019). DTTF launched in London and Manchester on billboards, rail and bus advertising. This was Seedlip's first major advertising campaign, followed by the 'We are Nature' campaign in January 2021 emphasising the brand's commitment to environmental goals.

Data collection

The main materials for both campaigns were initially identified through targeted Google searches for relevant webpages, videos/imagery, and news articles. A representative sample of specific campaign material 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. Matching mediums and materials were not always available (for example Heineken 0.0 produced videos for its campaign whilst Seedlip did not) but an effort was made to choose broadly parallel material and include content that provides a 'snapshot' of the overall branding and brand identity of each product. For example Seedlip's journal and story webpages were included, alongside Heineken's FAQ sections on both the NYC campaign and Heineken 0.0 product websites. Previous research suggests Instagram is becoming increasingly popular as a marketing platform for the alcohol industry (Kauppila et al. 2019), therefore a sample of relevant posts and images from each brand's Instagram account was also pulled for analysis between 01/01/2018-31/01/2021 (incorporating both campaigns and 3 'Dry Januarys').

5 Previous research by de Bruijn et al. (2012) also identified that Heineken and Diageo were the most prolific advertisers in 2010/11 across 5 European countries, collectively responsible for over 2,000 adverts and almost 20% of all alcohol advertising.

Table 1: Summary of content included in case study analysis

Heineken 0.0	Seedlip
5 'Now you Can' videos	5 'Drink to the future' advert images
10 Now you Can billboards or images	10 website 'journal' posts
UK Campaign website and product page on global website	Seedlip UK website homepage and 'our story' page with founder video
40 Instagram posts	40 Instagram posts

Heineken 0.0's Now You Can materials

Five short videos released in the UK in July 2018 were identified for the NYC campaign, alongside a campaign website featuring the videos, product information and an FAQs page. A supplementary Google image search identified billboard and poster images representing the NYC campaign in the UK and globally, and a sample of 10 images was selected for analysis. These were cross-referenced and checked for authenticity by only including images published through official Heineken outlets or displayed and reported across multiple news and media platforms. The product page for the global Heineken 0.0 website was also considered, which includes a more extensive FAQ section. Whilst Heineken 0.0 does not have a dedicated Instagram account, the main Heineken account (which includes mostly posts promoting Heineken, some posts promoting Heineken 0.0 and a small number promoting both) was trawled between 01/01/18 and 31/01/21 for posts including reference to Heineken 0.0 in imagery, text and hashtags. Of the 300 posts during this period, 40 (13%) concerned Heineken 0.0, and these were saved to a 'collection' on Instagram.

Seedlip's Drink to the Future materials

A sample of five (three billboard images and two relevant Instagram posts) DTTF advertisements were selected for analysis, alongside the Seedlip UK website homepage and product 'story' page (images were verifiable as they featured directly on Seedlip's social media accounts or website). Noting that this was a smaller campaign than the NYC campaign yielding less material, an additional sample of posts/articles on the 'journal' section of the Seedlip website was also selected. Of the 87 posts (news and stories) posted within the timeframe 01/01/18-31/01/21, one in every nine posts was selected, starting with the most recent, to derive a sample of 10 posts. Seedlip has a dedicated Instagram account, and 532 posts were posted in the timeframe. Using systematic sampling, every 10th post was randomly selected starting from January 2018 until a sample of 40 posts covering the relevant timeframe was obtained to match the sample of posts included for Heineken 0.0.

Data analysis

All sample Instagram posts were collated and saved as 'collections' on Instagram before being subjected to a three-stage coding and analysis process (see appendix one) informed in part by Buchanan et al.'s (2018) useful approach to thematic/content analysis of the digital marketing of energy drinks:

a. Stage One – primary categorisation of Instagram posts

b. Stage Two – content analysis of Instagram hashtags

c. Stage Three – thematic analysis of Instagram materials

In Stage One, all Instagram posts were allocated to a single, primary category (e.g. 'sport' or 'nature and conservation'). In Stage Two, all Instagram hashtags were allocated to a category and both the frequency of the use of particular hashtags and the dominant categories of hashtags were recorded. In Stage Three, an initial thematic coding framework was first applied to each product. This was partly inductive (emerging from the data) and partly deductive (created by drawing on the research questions to facilitate their exploration).

It was applied initially to overall posts including text or speech (in captions, hashtags and appearing as speech or text on any videos) and then the imagery, video and visual content were analysed more specifically (for example use of sporting imagery; gender of people in the posts; inclusion or absence of product).

Secondly, the thematic analysis was broadened to include all the additional material (campaign videos, images, posts and websites) and themes were adjusted accordingly. Once all material had been incorporated into final themes for each product, all themes were examined together and reworked to produce a single table incorporating themes spanning both products (although there were not huge amounts of overlap between the two products as they adopted very different marketing approaches). Four major themes were identified: Substitution and expanding temporal and spatial opportunities for consumption, Benefits of consumption, Lifestyle / image / identity and Consumption cues/guidelines.

Methodology Part Two: Semi-structured interviews

Interview rationale

The research elicited the views of NoLo consumers using semi-structured, in-depth interviews. These allowed for rich and detailed data to be gathered (Warren 2002), for participants to share their experiences and for insights to be obtained regarding their practices and reflections. Individual interviews also allowed for discussions of participants' drinking biographies and histories, including consideration of the contexts, spaces and environments in which they consumed NoLo drinks and their motivations for doing so.

Sampling and recruitment

15 drinkers and non-drinkers residing in the UK who had consumed Heineken 0.0 or Seedlip on at least three occasions in the previous six months were recruited online. An advertisement was shared through social media (Twitter, Facebook and Instagram), on local online groups in the York area and on the Club Soda Facebook page (an online community centred around 'mindful drinking'). Snowball sampling was used, encouraging viewers to 'share' posts within their own social networks to reach a wider audience.

Seven participants identified as male and eight female, and nine identified as middle-class and three as working-class (three did not identify with a class). All resided in the UK at the time of the research. 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/60s. 13 drank Heineken 0.0, five drank Seedlip, and several participants drank additional NoLo products (most often beer, followed by spirits, and less frequently NoLo wine or prosecco). Whilst previous research suggests drinkers are more likely than non-drinkers to consume NoLos (Corfe et al. 2020), this study captures the experiences of drinkers *and* non-drinkers who regularly consume NoLos. Six participants described themselves as 'former drinkers' and of the nine drinkers, two described themselves as 'moderating' or 'low level' drinkers:

Table 2: Participant Consumption Patterns (see appendix two for more detail)

Pattern of consumption at time of interview	Participants, age and self-identification
Exclusive consumption of NoLos	
Exclusive short-term	Alice, 32 (Drinker) Pete, 38 (D) Nina, 45 (Moderating Drinker)
Exclusive long-term	Adam, 37 (Former Drinker) Luke, 29 (FD) Suzanne, 52 (FD) Hannah, 30 (FD)
Hybrid consumption – both alcoholic and NoLo drinks	
Hybrid - mix	Emma, 31 (D) Christiaan, 41 (D) Liam, 26 (D) Ed, 42 (D) Georgie, 22 (D)
Hybrid – mostly NoLo	Rob, 34 (FD) Jacqueline, 68 (Low-level Drinker) Zara, 42 (FD)

Data collection and analysis

Institutional ethical approval was obtained from the University of Portsmouth (FHSS 2021-005) and the University of York[6] (ELMPS Ethics Committee) and participants were under no obligation to take part and had the right to withdraw. All were supplied with an Information Sheet prior to committing and completed a Consent Form. Data was stored securely and identifying features have been changed (for example, pseudonyms are used). Recognising that talking about alcohol could be a sensitive subject, support organisation information was available on the Information Sheet and highly personal questions were avoided, although participants were happy to share their own experiences and generally talked openly about alcohol consumption and themes such as mental health.

One-to-one semi-structured interviews lasting between 46 and 93 minutes were conducted and recorded online via Zoom. Interviews explored participants' relationships with alcohol across their life so far, their everyday (non)drinking practices (including their use of NoLos) and their motivations and reasons for drinking NoLos. Heineken 0.0 and Seedlip were discussed and examples of their social media and marketing materials were shared via 'moodboards' to elicit participant reflections. Interviews were transcribed, coded into themes and thematically analysed drawing again on an inductively and deductively developed coding framework. The themes were cross-referenced with those identified through the media analysis to identify crossovers and differences.

6 Ethical approval was obtained from both institutions as the researcher moved to a new post prior to the interview stage of data collection

Findings and Discussion

'Just another beer advert?' The Promotion and Marketing of NoLo Products

Addition Marketing? Expanding opportunities for consumption

Addition marketing 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). Whilst there was no evidence of this approach in Seedlip's material, the central premise of Heineken 0.0's NYC campaign is that 'now you can' enjoy a Heineken product during 'non-beer moments':

> *Heineken® 0.0 opens-up great new possibilities by transforming traditionally non-beer moments into opportunities to enjoy a beer, without the alcohol (global site).*

Figure 1: Still from Heineken Now You Can 'Parking' video (Heineken 2018) www.youtube.com/watch?v=KNZCe3I_X7o

This idea was central to all five promotional videos for the campaign, which featured Heineken 0.0 being drunk in cars, the gym and the workplace.

The same message was reinforced through billboard adverts – 'Every day can be bring your beer to work day' (image 10) - Instagram posts - Yoga and beer? Now you can (insta39) - and the NYC campaign website, which states 'that moment you couldn't have a beer... Now you can' (UK site). Only 10% of the Heineken 0.0 Instagram posts showed the product in a bar or pub setting, yet 25% were allocated to the category 'workplace or productivity' (the second largest category). This was also the third most common social media hashtag category, with hashtags such as '#workhardplayhard' and '#Mondaymotivation' accompanying the promotion of the consumption of Heineken 0.0 before or during work meetings. These techniques mirror tactics observed in prior research where 'alcohol companies frequently market zero-alcohol beverages as drinks to consume in new locations' (Miller et al. 2021: 1). This approach was often met with scepticism by participants and described as 'not a real-life context or scenario' (Zara, 42) or 'weird' (Suzanne, 52), rather than reflecting how participants themselves 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 with it"*
>
> **(Hannah, 30)**

Alongside attempts at spatial expansion, social media posts also encouraged temporal expansion of drinking occasions, using language such as 'big night tonight and a big day tomorrow' (insta22) or 'Monday drinking, Tuesday clear thinking' (insta14) to encourage the consumption of Heineken products at times when they might not normally be consumed, such as before a 'big day' or 'fresh week' at work. The global website also invites consumers to 'enjoy a Heineken® beer at any time of day'

(see Vasiljevic et al. 2018a for similar findings around lunchtime drinking). Again, there was resistance to this from participants. For example, 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, but I don't think people would? I know how we drink and I wouldn't sit down on my lunch break and pour myself some Seedlip… 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)**

Across the materials, Heineken 0.0 was positioned not as a long-term product of choice for abstainers, but a temporary substitute for 'real' beer in settings where consuming alcoholic products may be illegal (driving), inappropriate (the office) or *temporarily* undesirable (Dry January). Whilst alcohol marketing more generally has also tapped into Temporary Abstinence Initiatives (TAIs) (Kauppila et al. 2019), Instagram posts that tied in with 'Dry January' (the third largest category of post), positioned Heineken 0.0 as an option to help consumers to 'get through' a tough month and make - for example - that 'last weekend of #DryJanuary easier than ever' (insta40). The message is that taking a break from drinking might be a challenge and that consumers will return to consuming alcohol at the end of the month.

In the ways illustrated above, Heineken 0.0 is depicted as an option for drinkers in limited contexts and at certain times, but one that will not encroach upon one's usual drinking practices. These findings might be expected; previous research suggests that brands already offering an alcoholic product as their 'flagship' drink are more likely to lean towards this 'addition' approach (Corfe et al. 2020; Vasiljevic et al. 2018a). As participants in the current research noted, there may be something of a tension for alcohol brands who produce a NoLo option as alcohol sales will be affected if consumers make a sustained switch to the NoLo alternative.[7] The marketing of NoLo products as something to be consumed in *new* settings represents a potential solution for the industry; it can preserve traditional drinking spaces, times and contexts as occasions for alcohol, whilst simultaneously attempting to open up *new* opportunities to consume NoLos. Participants identified the overall message as 'don't order this zero in a pub, order our special normal Heineken, this is for when you can't get to a pub' (Jacqueline, 68) and argued this kind of advertising is seeking to 'expand the market rather than getting drinkers to switch' (Suzanne, 52). With only 1 in 10 of Heineken 0.0 Instagram posts showing the product in a traditional bar or pub setting, participants expressed frustration as they felt showing NoLos in typical drinking settings would better reflect their own practices and could help to normalise NoLo consumption.

Sports sponsorship and alibi advertising

Whilst Seedlip's marketing did not have strong associations with sport, this was a dominant feature for the material analysed for Heineken 0.0, particularly in relation to social media. Over 25% of Instagram posts were 'sport' posts (the largest

7 Although Seedlip is now owned by Diageo, it does not have a direct competitor flagship product (unlike Heineken 0.0) which may in part explain the general lack of addition marketing noted in Seedlip's material.

single category), and over 25% of hashtags used were sport-related (again, the largest single category). Posts were linked predominantly to sponsorship of UEFA (football) or to Formula One (motor-racing), with motor-racing posts featuring high-profile F1 drivers. This mirrors strategies in alcohol marketing where sports sponsorship is commonly observed (Kauppila et al. 2019). Sports-related consumption cues were also common. Sporting imagery and language featured across multiple posts and sporting metaphors were drawn on, specifically in relation to the '0.0' aspect of Heineken 0.0; for example, 'This Friday's #UELfinal can't end 0.0, but you can start it with one' (insta27) and 'Game 0.0n' (insta34).

Sports sponsorship functions as a way of raising brand awareness (Hastings 2009) and encouraging alcohol consumption (Brown 2016), and concerns over alibi marketing and sport sponsorship have been raised by researchers and health professionals (Purves and Critchlow 2021). All participants noted the associations between Heineken 0.0 and sport sponsorship and advertising, commenting on UEFA and F1 advertising and with some arguing that the similarity of the bottle to Heineken 0.0's alcoholic counterpart means it is difficult to tell the difference. Whilst the Heineken global website describes Heineken 0.0 as 'staying true to the brand's iconic bottle' but with a blue label and cap 'to differentiate the alcohol-free variant', participants picked up on the similarities rather than differences. Heineken 0.0 was described as 'comparable to any other beer' (Pete, 38) and 'almost indistinguishable from Heineken itself' (Ed, 42), building on previous research suggesting the labelling of NoLo products can be unclear and inconsistent (Anderson et al. 2021). Luke (29) described seeing Heineken 0.0 adverts during a football match and reacting with 'oh, it is just another beer advert'. Christiaan (41) suggested Heineken might even be 'downplaying the Zero bit on there because they just want the Heineken name in a football stadium', whilst Georgie (22) argued that, as reported in prior research (Kaewpramkusol et al. 2019), when consumers see Heineken branding they will associate it with the alcoholic rather than alcohol-free product.

> *"I don't know how they can get away with it. To be honest, part of me would rather them just promote actual Heineken because it's the principle of it. It's just the principle of it that's annoying because it's not promoting alcohol-free beer, it's promoting your brand… [cut]… You see Heineken rolling around the screens at the bottom of the thing. Half time, what are you thinking about? Heineken! And then you go and get a pint"*
>
> **(Georgie, 22)**

It is apparent that participants had concerns about alibi advertising and the potential for the alcohol industry to us it to bypass current or future regulations limiting alcohol marketing at sporting events. There is evidence this is already happening; Murray et al. (2018) highlight forms of alibi marketing used by the wider Carlsberg brand (for example through use of the brand catchphrases 'probably' and 'the best in the world') at the UEFA Euro 2016 finals to bypass French Laws that prevent alcohol marketing in this context. Yet despite the frequency with which NoLo beers have obvious joint branding with their alcoholic counterparts (Corfe et al. 2020), the sale and promotion of NoLos remains largely unregulated (Porretta and Donadini 2008).

'Lifestyle' marketing

Heineken 0.0 marketing material tended to focus more on the 'product' – 17 out of 40 social media posts featured mainly or only the Heineken 0.0 bottle – and adopted explicit and clear promotional messages including 'great taste' and 'only 69 calories'. Participants described this material as 'loud' and 'no-nonsense', and felt Seedlip's marketing was more subtle, drawing on a range of aspirational images and a particular aesthetic to sell a lifestyle or experience rather than a product; a strategy that is also evident in targeted alcohol marketing (de Bruijn et al. 2012; Jackson et al. 2020). Corfe et al. (2020) describe this as 'substitution' - rather than 'addition' - marketing. This approach positions NoLo consumption as linked to a community, movement or high-status lifestyle, with Corfe et al. finding in their own research that 'the "status" good element of Seedlip is central to their marketing' (2020: 54). A lifestyle-centred/status good approach echoes strategies used in alcohol marketing where 'alcohol products have been increasingly advertised as lifestyle markers in sophisticated campaigns to appeal to and develop market niches' (Measham and Brain 2005: 267), whilst also tapping into the ways in which contemporary consumption choices function as a form of 'identity work' (Nicholls 2021).

Central to this for Seedlip is the theme of 'nature'. This was dominant across all marketing material, with the website boasting 'we are nature'. Founder Ben's 'farming heritage' is drawn upon frequently, and the meaning of 'seedlip' is described in an online article:

> *A seedlip is the name of the basket that farmers wear around their necks to carry and sew [sic] seeds with ease. This little-known fact is a nod to our founder, Ben Branson's 300-year-old farming heritage (article 5)*

Ben's discovery of old herbal remedies and experimentation in his kitchen using herbs from his garden forms the 'origin story' of Seedlip (see also Corfe et al. 2020), establishing distance from the brand's current ownership by major alcohol brand Diageo. 40% of Seedlip's sampled Instagram posts featured 'nature' related imagery and 35% were categorised as 'nature/conservation', the single largest category. Social media posts focused on the healing powers of nature, offered 'nature facts of the week', drew on particular notions of a romanticised rural British idyll and mentioned conservation and the environment. This is also exemplified in Seedlip's monthly 'nature newsletter'; the first episode promises 'seasonal highlights to help you tune-in to the great outdoors' and advice on planting/gardening (insta18). Social media posts and articles also celebrated the natural ingredients in Seedlip and its 'heritage' (insta13 and 24, brand story, articles 5 and 10). In this way, consumers are frequently reminded of the heritage and 'naturalness' of the product, which serve as supposed markers of both brand quality (Gupta et al. 2018) and 'healthiness' (Keric and Stafford 2019).

Participants clearly identified these themes, noting the consistent use of distinctive colour palettes, floral and nature-related imagery in Seedlip's branding and the DTTF campaign:

> *"They are trying to link back to nature, I suppose, particularly with the bus and all the greenery on it. And on the countryside pictures as well"*
>
> **(Nina, 45)**

This 'natural' (Ed, 42) or 'botanical' (Emma, 31) material was perceived as targeting a particular type of consumer, someone who might be 'bohemian' (Pete, 38) or 'slightly country, boho-ish' (Suzanne, 52). Some of the participants also suggested Seedlip was trying to tap into a

'modern, eco-conscious' (Hannah, 30) mindset held by young people:

> *"It's appealing to that kind of environmentally conscious individual as well, and someone who's 'drinking to the future'. So you're thinking about our planet, you're thinking about the impact that your drinking is having on your health and on the world"*
>
> **(Emma, 31)**

This is echoed on Seedlip's website, which assures customers that they can 'feel good about what you buy' and promotes Seedlip's 'commitment to celebrate and protect the planet' (through recycled and reduced packing and carbon neutral delivery). This targets the discerning and environmentally conscious consumer who can afford to spend a little more to 'feel good' about buying a product with green credentials.

In a second theme, a particular imaginary of urban life was drawn upon through Seedlip's marketing. Whilst 'nature' was the most common category for Instagram posts, this was followed by 'bars/restaurants' (23%). 28% of Instagram posts included text or imagery relating to cocktails and just under a quarter featured a Seedlip bottle, usually shown with a white background, outside in a garden or field or in an urban bar. Over 20% of hashtags were categorised as 'bar/restaurant/cocktails' or 'urban', rising to 37% once the hashtag category 'exclusivity/expertise' was included. There was a clear aspirational dimension to much of this material, positioning the product in the minds of consumers as 'fashionable' (Emma, 31), 'luxury, upmarket' (Hannah, 30) or associated with drinkers who are 'cool and hipster' (Alice, 32). Posts on social media promoted non-alcoholic pairing menus (insta1), tied in to 'The World's 50 Best Restaurant Awards' (insta6) and announced Seedlip's launch of NoLo concept bars in various global cities (insta7).

Figure 2: Image from Seedlip's Instagram account (Seedlipdrinks 2019) promoting exclusive supper club in London, UK. https://www.instagram.com/p/Bzp79DeH74j/

The impression – supported by the relatively high cost of Seedlip - is of a product for affluent, urban and well-travelled consumers with particular tastes not just in terms of drinks, but more widely in relation to food, travel, leisure and conservation (see Adams and Rainsborough's (2008) work on 'ethical' coffee consumption and classed identity for parallels).

An air of exclusivity was continually promoted through language such as 'the world's first distilled non-alcoholic spirits' (website), 'limited edition' (insta6 and 26), 'sneak peek' (insta7) and through exclusive 'secret' parties (insta33) or partnerships with brands such as

Marks and Spencer and Selfridges. The brand's 'story' online reinforces this image:

> *Following two years of experimentation to develop a bespoke distillation process for each individual ingredient, Seedlip's aromatic Spice 94 debuted in Selfridges in late 2015, the very first batch of 1000 bottles sold out in just three weeks, the next in three days, and the third 1000 in less than half an hour. Iconic bars, hotels & restaurants… were soon in touch. The demand was clear.*

At first glance the dominant themes 'nature' and 'urban life' in Seedlip's materials may seem incompatible, yet these work together to tap into a 'new sensibility' in mainstream media, which depicts a young, middle-class, environment-conscious urban consumer as driving the growing NoLo trend (Corfe et al. 2020). In this way, Seedlip is simultaneously portrayed as a sophisticated product yet one with natural and ethical credentials. Indeed, the two intersect as 'green' or ethical consumption is adopted predominantly by middle-class consumers (Cowe and Williams 2000) and functions as a high-status practice (Huddart Kennedy et al. 2019) or way to signal social status (Elliot 2013). These approaches represent a very different set of marketing tactics to those deployed by Heineken.

'A nice little life hack': Consumer (Non)Drinking Practices

Hybridity, moderation and substitution

The 'addition' versus 'substitution' model has been applied to NoLo consumption as well as marketing, with previous research suggesting addition – drinking NoLos on top of usual alcohol consumption – is more common (Miller et al. 2021). However, in the current study, there was little evidence of this, and several participants disliked the examples of addition marketing that were discussed (as indicated above). This suggests there is something of a disconnect between the use of addition marketing and actual (non)drinking practices.

Perhaps unsurprisingly - as they were current NoLo drinkers - all participants expressed some ambivalence towards alcohol. In line with previous research suggesting midlife may be a period for reflection and change around drinking (Fenton 2018; Nicholls 2022), several had made changes to their practices, for example undertaking at least one 'dry period' where they had taken a break from drinking. At the time of the research, seven participants were exclusively drinking NoLos and seven were 'hybrid' drinkers who consumed a mixture of alcoholic drinks and NoLos (see appendix two)[8]. In the 'exclusivity' category, three were self-identified 'drinkers' embarking on a short-term, fixed period of sobriety (pregnancy/breastfeeding, a 'dry 2021' or as part of a diet or health kick), whilst four were 'former drinkers' who had decided to stop drinking for the longer-term or permanently. In the 'hybrid' category, several participants had rules or norms around when they drank alcohol (for a treat, at the weekend, when out socialising) and when they drank NoLos (to avoid the aftereffects of drinking, when training for a sporting event or on a health kick, during the week, when at home). There were also a few participants who *almost* exclusively drank

8 Zara (42) was an exception here. She was not drinking NoLos or alcohol at the time of interview due to a health and fitness project, but she had recently drunk NoLos exclusively whilst pregnant and breastfeeding and she envisaged adopting a hybrid model on reaching her goal weight

NoLos but would drink alcohol for 'very special occasions' or a few times a year.

All participants talked positively about what they described as the increased availability of NoLo options. The term 'choice' was widely drawn upon; Zara (42) celebrated having 'choice' and 'options' and Nina (45) said 'it's just nice to have an alternative'. NoLos were felt to provide choice in particular for drinkers who saw them as a tool to support more moderate drinking (see Rehm et al. 2016). For example, a 'hybrid' drinking model was described and praised by several participants:

> *"You can be a hybrid when it comes to drinking. You're not necessarily the non-alcoholic drinker that chooses the non-alcoholic option. You can be the person who enjoys both"*
>
> **(Pete, 38)**

Similarly, Ed (42) said 'a hybrid model works well for me' and Alice (32) said 'you can mix it up, it doesn't have to be that you are entirely booze-free or you drink all of the time'. Examples of actual *co-consumption* of NoLos and alcohol in a single drinking session were rare; Nina (45) was the only participant who did so. Rather, hybridity was more often described in terms of limiting alcohol consumption to particular nights of the week (such as weekends) or locations (such as outside the home). For example, Christiaan described exchanging alcohol for NoLos at home as did Liam (who says he thinks he would 'almost definitely' drink a bit more alcohol if NoLos were not available):

> *"I think, what I'll probably maintain for quite a while is not drinking [alcohol] at home, just when I go out. I mean I'll have one beer, and then go home, or have one beer with a meal. I just like having the options… I know I'm drinking at a level I'm comfortable with, because it's, literally, one or two a week at most"*
>
> **(Liam, 26)**

> *"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)**

These practices were often positioned as part of a wider shift in one's relationship with alcohol; almost all participants described a 'maturing' of drinking practices in adulthood and a move away from the excesses of youthful binge drinking (see

Britton and Bell 2015; Maggs and Schulenberg 2004). Alcohol was (re)positioned as something to be appreciated for the taste, to be paired with food or to be managed alongside the increasing responsibilities of adulthood, tying into wider discourses around 'responsible consumption' (Caluzzi et al. 2020) and framings of moderation and self-control as a personal responsibility (Room 2011). However, true moderation was felt to be difficult to achieve, with consumption tending to 'creep up' unnoticed. Incorporating NoLos into drinking routines was recognised as a tool to help consumers to manage their drinking, find a 'happy medium' (Ed, 42) and achieve their desired relationship with alcohol in adulthood. There was also some indication amongst the non-drinkers that NoLos supported them in non-drinking or sobriety. For example, Hannah (30) clearly stated that she regards NoLos as a 'replacement' for alcohol and admitted she 'would find it a lot harder' to stay sober without them, whilst Rob (34) credited NoLos with helping him to maintain sobriety during difficult periods.

A simple 'addition versus substitution' model may be too rigid to account for participants' *changing* relationships with NoLos and alcohol and fail to accurately capture the experiences of non-drinkers (for whom addition does not fit as a concept). Furthermore, it can 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). Nonetheless, as these examples and others from the data indicate, participants did not describe drinking NoLos in addition to their usual consumption practices, and there *was* some evidence of substitution, whereby NoLos were directly replacing alcohol in order to help participants maintain a balanced relationship with alcohol or sobriety.

An experience like drinking…

NoLo products were valued simultaneously for their similarity to *and* their distinction from alcohol. In terms of similarities, NoLos were appreciated because they offered something that 'has the taste and gives you part of the experience, but without the alcoholic element' (Pete, 38).

> *"It's just the taste of it… and the feel of it on your tongue and in your mouth, and when it hits the back of your throat it's beery. Especially with things like alcohol free Heineken and some of the ones that actually taste of beer, they do hit the spot"*
>
> **(Liam, 26)**

Taste was an extremely important motivating factor in NoLo consumption; several participants explained that they wanted a NoLo that tasted not just 'good' but also 'like alcohol'. This focus on taste was echoed in marketing materials; the tagline for the Heineken 0.0 NYC videos - 'great taste, no alcohol, only 69 calories' – stresses 'great taste' as an immediate priority, whilst Seedlip describes its products as 'delicious' and 'complex' (website) with a quiz included on the website to help consumers 'discover the Seedlip Spirit most suited to you & your palate' (website). Some participants also discussed how they wanted the 'mouth feel' or the 'feeling' of drinking a NoLo to mimic alcohol consumption. This could include some of the emotional or psychological effects of drinking; for example a drink making a participant feel more relaxed or marking the end of the working day (see Conroy and Nicholls 2021). For example, non-drinker Hannah (30) described wanting to keep NoLos as a 'special drink' to be

associated with the weekend, leisure time or social occasions, just like alcohol used to be. Again, marketing materials drew on some of these themes, with Heineken 0.0 promoting the 'refreshing' nature of the product and linking consumption to 'relaxation'. Meanwhile Seedlip frequently depicted the product in drinking settings that might be associated with leisure time, including bars, restaurants and attractive rural settings.

In most interviews, participants were keen to share their experiences of drinks they liked and a subset of the sample – generally longer-term non-drinkers - positioned themselves as particularly adventurous drinkers who sought out new flavours or ordered new products online (for example Suzanne (52) said talking about NoLos was a 'favourite subject of mine', positioning herself as passionate, informed and knowledgeable). Others talked about having knowledge about the 'right' things to drink; Adam (37) described having a 'hobbyist view towards alcohol [that] has definitely been extended into the alcohol-free' world, whilst Ed (42) had set up a group chat online with his friends to share 'recommendations'. Similarly, Luke expressed excitement at 'sinking my teeth into' the expanding range of craft ales (see also Corfe et al. 2020):

A number of participants saw their adventurous approach to NoLo products as connected to the way they drank previously; Luke (29) was 'passionate' about taste and Hannah (30) had been 'a big fan' of sour beer who would avoid 'standard' or 'boring' beer. Luke also distanced himself from the drinkers of 'your standard supermarket beer', positioning them as the kind of people who might just be interested in drinking for the intoxicating effects (see Thurnell-Read 2018). An interest in NoLos could almost become part of one's identity or lifestyle, something drawn on explicitly by Liam (26) who suggested that drinking NoLos could be part of 'an alternate lifestyle' in which one could feel 'invested', echoing Thurnell-Read's (2016) findings on craft ale connoisseurship as a form of 'serious leisure'. It may be that emphasising the taste and pleasures of NoLos can serve as a rationale for their consumption or a way to respond to those who might question the 'point' of drinking a product that mimics alcohol but does not contain it, as suggested by Luke when he notes that he is interested in taste rather than drinking as 'just a vehicle for getting drunk'.

There was also evidence that participants wanted to consume NoLos in ways, settings and contexts that mimicked alcohol consumption, again challenging the premise of addition marketing. Participants wanted NoLos to be served and presented in ways that echoed their drinking

> *"A lot of people will say, "What is the point of drinking alcohol-free beer if there is no alcohol in it?" I would assume that those people would be happy with your standard supermarket beer and don't have too much of an interest in the craft scene, but I do. I really like unique local sellers of beer or wine and things like that and exploring it as more than just a vehicle for getting drunk. Losing that, by giving up alcohol, was a bugbear for me, but now that I have discovered that there is this huge scene and huge flourishing market of non-alcoholic drinks, it is kind of filling that gap"*
>
> **(Luke, 29)**

practices and preferences (for example several described feeling excited when pints of NoLo beer are available on draught). Previous research highlights how alcohol consumption functions as an important shared activity (Bartram et al. 2017a); drinking something resembling alcohol may help consumers to 'fit in' with the rest of the group and NoLos were commonly consumed in 'typical' drinking contexts such as socialising with friends. Participants identified these kinds of moments as times when they 'missed' drinking, so appreciated having the option of a NoLo to help them fit in, feel included and 'share in the experience' (Pete, 37):

> *"If you are with a group of friends that are drinking a bottle of prosecco, to sit there with a glass of water or squash, it would just feel so separate. Whereas, at the weekend, I had a group of girls around. I had all my bridesmaids around at the weekend and they were all drinking prosecco and I had Nozeco [alcohol free 'prosecco']. There was no difference. You do feel part of it"*
>
> **(Hannah, 30)**

The examples from the data suggested participants were not introducing NoLos into new contexts and situations; rather they were seeking products that resembled the type of alcohol they drank/used to drink and were using NoLos to feel included in traditional drinking contexts or to mirror familiar drinking patterns and processes. In this sense, they were often responding to traditional consumption cues; and were more interested in incorporating NoLos into existing drinking routines rather than creating new ones.

…But without the consequences

> *"The reason that I started drinking alcohol-free… I wanted to have a drink of an evening, probably more a Friday or a Saturday night, to be like, "Work's finished". You know, celebrate the end of the week... So me and Nate were sharing a bottle of prosecco, and the next day, I was waking up and I was like, "You know what, I feel rough. I'm already knackered from a new job, and we want to go on a hike today or whatever, but I'm just feeling exhausted". I said to Nate, "I'm just getting tired of this," and I was only having a couple of glasses. It was actually him that then bought me a bottle of Seedlip"*
>
> **(Emma, 31)**

At the same time, participants also valued NoLos for their *differences* from alcohol, with NoLo consumption described as 'cheating' or a 'nice little life-hack' (Rob, 34) because it was like consuming alcohol but without the negative effects. One of the most common perceived benefits of NoLos over alcohol was that participants associated them with feeling 'sharper' and more 'productive' the day after drinking. A number talked about the joy associated with 'waking up on a Saturday morning hangover free' (Georgie, 22) or the pleasures of being able to enjoy a drink without feeling 'rough' (Alice, 32), 'tired' (Nina, 45) or 'sluggish' (Christiaan, 41) the day after. For some, this was the primary motivator for consuming NoLos.

This was often tied into wider notions of wanting to be productive. For example, Georgie (22) described how she works every weekend so doesn't 'have time to have a hangover', whilst Alice (32) noted that she cannot afford to 'have a write-off day' because of the responsibilities of parenting and Hannah (30) described loving the feeling of having more 'get up and go' to exercise in the mornings. Some felt the negative effects of alcohol could even extend into the next few days, having a knock-on effect on mood and ability to be productive. For example, Ed (42) described how drinking 'really affects my motivation for a few days', producing a kind of 'boozer's gloom'. He goes on to talk about periods when he has taken a break from drinking to avoid these effects, including during a period of upheaval moving back to the UK from abroad:

> *"New country, new house, new job. Just so much going on that I was like "I just do not need my mental space clouded by booze at this stage". So that was a six-month period of not drinking at all... If you think about your major life anchors, that is all of them pulled up at once. So I didn't really want to be running on 60%"*
>
> **(Ed, 42)**

Here, the suggestion is that alcohol 'clouds' one's mental space, reduces motivation and limits one's ability to manage life changes.

Christiaan also described how he felt when swapping alcohol for NoLo products:

> *"You made that conscious choice to not drink and it makes you feel proud, as in, hey, I'm not just living in the moment. I'm already thinking about tomorrow… So it makes you feel like you're planning ahead and you're conscious of what is coming tomorrow… If you just drink, drink, drink, you're not worrying about tomorrow, which is nice once in a while, but maybe not when you're 45"*
>
> **(Christiaan, 41)**

Here, 'living in the moment' – drinking alcohol without thinking about the consequences - is associated with youth and a lack of responsibilities, whilst 'thinking about tomorrow' (through consciously choosing a NoLo instead) is mature and responsible; a way of 'thinking about the bigger picture' according to Fry (2011: 361). A small number of participants more explicitly linked the consumption of NoLos to the idea of self-improvement or 'optimising' the performance of the body or mind (see Nicholls 2021; Yeomans 2019). This is evident in Ed's desire to not be 'running on 60%' during periods of change, whilst Christiaan described NoLo consumption as 'a performance thing' at points in his training for long-distance running. Adam (37) framed sobriety as part of a wider effort to improve his overall wellbeing and mental health, whilst Rob (34) simply said 'I want to be a better version of myself' when asked why he had stopped drinking. Whilst this narrative of self-improvement is most explicit in these examples, it was threaded throughout the data in discussions around optimising productivity and improving motivation. Another key benefit of NoLos was around their perceived benefits to mental and physical health, as discussed below.

'Lagers for Lads': Health claims, Gender and Social Norms

Health Claims

As Vasiljevic et al. (2018a) note, NoLos may be advertised in ways that position them as a 'healthier' alternative to alcohol; for example promoting reduced calories as a 'health benefit' (Shemilt et al. 2017). Yet (Anderson et al. 2021a) suggest that evidence of the health benefits of NoLos remains scarce and argue that some research in this area has received alcohol-industry funding. There was certainly evidence that 'health claims' were being drawn upon in marketing by Heineken 0.0. On occasion this was explicit, for example with the widespread advertising of the product's calorie count. At times this was more subtle, for example through implying NoLo consumption was compatible with – and could even be incorporated into – exercise regimes and sporting activities, or positioning Heineken 0.0 alongside 'healthy' food:

Figure 3: Now You Can Campaign Image from Heineken's 2019 Annual Report (Heineken 2019: 13) https://www.theheinekencompany.com/sites/theheinekencompany/files/Investors/financial-information/results-reports-presentations/heineken-nv-hnv-2019-annual-report.pdf

Salad: Check. Gym: Check. Beer? Check (image 7).

Meet someone for a drink at the gym? Now you can (image 8).

Make barre class feel like a bar (image 9)

Participants also felt the sporting references and sponsorships created associations between Heineken 0.0, sport and health, and felt the product was targeting health-conscious consumers:

> *"I see it as linked with a healthy… If you do sport, if you care about your physical fitness, if you care about your health, then Heineken Zero is the healthy alternative"*
>
> **(Jacqueline, 68)**

Jacqueline identified a 'sporty, healthy twist' in Heineken 0.0 marketing, whilst Suzanne (52) suggested Heineken 0.0 is positioned as part of a 'healthy lifestyle' through 'linking into sports and the gym'. Several participants felt Heineken 0.0 were targeting a 'young professional and health conscious' (Adam, 37) market, or appealing to those who 'want to lose a bit of weight' (Emma, 31). This was linked by participants to wider moves towards 'health consciousness' and a growing 'gym culture' (Ed, 42) or move towards 'healthism' (a discourse that compels people to manage their health and wellbeing, positioning this as an individualised 'moral' responsibility (Caluzzi et al. 2021; Cederström and Spicer, 2015). Keric and Stafford (2019) identify ways in which the alcohol industry is already tapping into this trend through the promotion of 'better-for-you' – but often full strength – drinks targeting young consumers; this was also apparent on the Heineken 0.0 global website, where Heineken explains it is 'responding to the growing trend of healthy living' (global site) and targeting the 'health conscious' 'gym goer' (global site). Marketing was more subtle in Seedlip's material, and explicit references to calorie content were avoided in the material analysed. However, the campaign tagline 'drink to the future' – alongside messaging imploring consumers to 'drink smarter' – could be interpreted as linking to individual decisions to make 'healthier' consumption choices:

> *"I think 'Drink to the Future', that's clever because you're saying you're making healthy choices and you're thinking about the future. You're basically being smarter than everybody else"*
>
> **(Christiaan, 41)**

Whilst participants recognised these kinds of messages in NoLo advertising, there was some scepticism towards the idea that the alcohol industry might genuinely be motivated to improve public health. Most participants who described a growing NoLo market felt that this was driven by consumer demand, with two thirds recognising that drinking is in decline amongst young people in the UK and some identifying the recent rise of new sober communities on social media (see Sinclair et al. 2017). The expanding market was attributed not to the alcohol industry's desire to encourage moderate drinking practices, reduce alcohol consumption or improve public health but rather to the possibility of widening their brand portfolio or tapping into new markets. Here we see some parallels with the argument advanced by White et al. in relation to lower calorie or low sugar products – the aim of such products is 'to promote consumption rather than health' (2014: 121). Participants

were also sceptical towards materials showing Heineken 0.0 consumption in settings such as gyms and did not feel these were realistic representations of how NoLos might be used. They, did, however, frequently draw on health claims when discussing their own reasons for NoLo consumption.

Mental and physical wellbeing were key factors in several participants' decisions to stop drinking or drink less alcohol. As Caluzzi et al. (2020) argue, this increasingly pervasive discourse is likely to be contributing to declining drinking rates with 'health' an important factor in shaping people's decisions to drink lightly or abstain. Discussions of mental health were more prominent than discussions of physical health (although both were mentioned), and for non-drinkers mental health tended to be a more significant driver than physical health in shaping their decision to stop. NoLos were regarded as beneficial by both drinkers and non-drinkers as they did not cause the mental health side effects associated with alcohol. Liam, for example, described doing a 'cost-benefit analysis' in his head to consider whether it was worth having a drink and feeling 'a bit low' the next morning, whereas when drinking NoLos this was not a concern:

> *"The main benefit for me [of a NoLo] is it doesn't have the side-effects of the drug aspect of alcohol. It doesn't affect my mood at all"*
>
> **(Liam, 26)**

Physical health was acknowledged too and described as something that had become more of a priority as participants grew older, with several mentioning they had become 'increasingly aware of health issues' (Jacqueline, 68) such as cancer and liver cirrhosis. Nina (45) noted 'there are so many negative effects of what alcohol is actually doing to your body', claiming that 'historically' she had not really considered the health implications of drinking alcohol versus NoLos, but this was something she was much more aware of as she had grown older, whilst Ed remarked:

> *"You only get one body, don't you? You really have to look after it as much as you can. I just don't want to be that guy who is 50, pulling a massive beer gut around, and struggling with knees and all that sort of stuff. Yes, if I view the future, that is not really what I want to see, so that is a big reason for managing drinking a bit as well… [cut]… I just think if you get yourself into quite an unhealthy state, it takes such a colossal turnaround… trying to lose weight and lifestyle changes, the whole lot? I just think it is easier to head stuff off at the pass and keep everything moderate and keep yourself healthy"*
>
> **(Ed, 42)**

Ed linked 'moderation' – in terms of drinking but also more widely – to attempts to 'keep yourself heathy' and 'head stuff off at the pass' in terms of possible consequences later in life if unhealthy choices are made when younger. As with the earlier discussion of productivity, a sense of looking towards or thinking about 'the future' was notable in this and other accounts. In this way, NoLo consumption was often framed as a 'smart' choice in terms of thinking about the

future in both the short-term (feeling productive and energised the next day) and the longer-term (looking after one's health into middle and old age and 'ageing well') (see Nicholls 2022; Peel et al. 2004).

Although not the same thing as 'health', many participants also mentioned calorie count and sugar content when asked about health considerations (see also Shemilt et al. 2017). Some suggested NoLos might be healthier, good for those 'watching their weight' (Nina, 45) and contain less sugar than what Suzanne called 'full-fat alcohol' (see also Keric and Stafford 2019); Seedlip is marketed as both sugar and sweetener-free and Heineken 0.0 is lower in sugar than soft drinks such as fruit juice. Other participants were uncertain of the health implications of NoLos (see Niva et al. 2013) or claimed that they should be regarded as a treat and consumed in moderation. A couple of participants also described consciously incorporating NoLos into their routines as part of a wider change to diet and lifestyle. Others noted that the lower calorie count of products such as Seedlip means they can be consumed as part of weight loss programmes such as Slimming World, potentially tying into gendered expectations about femininity, dieting and weight loss (Caluzzi et. al 2021). However, some male participants also discussed these themes and no participant cited the reduced calorie count as a *primary* motivating factor in NoLo consumption; rather the term 'added benefit' was used by male and female participants to describe how they felt about this aspect of NoLos. This is interesting to note as some of the marketing material for Heineken 0.0 promotes the low-calorie count as a key attraction, whereas participants were much more likely to prioritise benefits such as improved mental health, lack of hangovers or feeling energised and productive.

Gender

Alcohol marketing is frequently gendered in ways which tie into wider expectations and norms around how, when and what one should drink (Lyons and Willott 2008; Rudolfsdottir and Morgan 2009). Participants clearly recognised this, identifying gendered dimensions to marketing materials and the ways in which alcohol consumption is bound up with the performance of gendered identities. This included describing drinks such as wine and cocktails as 'lady-ish' (Zara, 42), 'ladies' drinks' (Rob, 34) or 'a girly thing' (Emma, 31). Beer was associated with masculinity, and participants also reflected on what Adam (37) called the 'toxic' intersections between heavy drinking, masculinity and playing and watching sport. Heavy drinking was positioned as an important aspect of sporting cultures, a significant component of men's leisure activities and friendships and as bound up with successful performances of masculinity.

Turning more specifically to the case study products, almost all participants saw aspects of these gendered patterns in Heineken 0.0 and Seedlip's marketing materials (although it is interesting to note that neither product *explicitly* identifies a particular gendered market and the Heineken 0.0 global website outlines attempts to appeal to both men and women). 12 out of 15 participants thought Heineken 0.0 was 'a bloke drink' (Nina, 45) and 'sticking to that kind of beer branding, lagers for lads, at the footy kind of a thing' (Alice, 32). Porretta and Donadini (2008) identify young men as the target market for NoLo beer, a sentiment echoed by participants who felt Heineken 0.0 was trying to appeal to 'young to middle aged men who are either out drinking or watching sport' (Pete, 38). Participants also drew on links between beer and masculinity more generally and commented on the overall style and aesthetic of the Heineken 0.0 marketing as something that might be unlikely to appeal to women (Emma, 31). For example, the use of 'loud' and 'bold' text and imagery (Adam, 37), particular colours (Hannah, 30; Liam, 26) and a kind of 'no-nonsense, gruff' approach (Rob, 34) was clearly felt to be attempting to appeal to a male audience.

As Gee and Jackson suggest 'the role of beer in signifying and symbolising masculinity is unparalleled' (2012: 86), with imagery and

themes used in alcohol marketing circulating culturally-approved ideals of what it means to be a man, highlighting characteristics of hegemonic masculinity and conflating drinking and sexual success (Szmigin et al. 2011). The data suggests that the 'beer, sport and men nexus' (Wenner and Jackson 2009: 6) - whereby beer is inextricably bound up with cultural notions of masculinity *and* with sport - can be extended to include NoLo beer alternatives. Participants identified this 'nexus' and felt Heineken 0.0 reinforces it and helps to cement the cultural associations between beer and masculinity. Allusions to masculinity are apparent in Heineken 0.0 marketing through frequent football and motor-racing references and partnerships with male Formula One drivers such as Nico Rosberg and David Coulthard (one social media post features a fairly lengthy 'father and son' style advert starring Rosberg and his father engaged competitively in a series of masculine pursuits such as fishing and driving (insta24)). Additionally, the social media material featured men drinking Heineken 0.0 more than twice as frequently as women, with women more likely to be serving Heineken 0.0 (to men) than drinking it. Heineken 0.0 also promotes an upcoming James Bond movie; Secret agent 007 - shown ordering a Heineken 0.0 because he is 'working' - embodies a particular form of aspirational, hegemonic masculinity marked by physical strength/skill and heterosexual 'conquests'. It could be argued that positioning 'hyper-masculine' figures such as James Bond and world-renowned motor-racing drivers as the types of men who drink Heineken 0.0 may help to challenge the notion that 'real men' consume large quantities of alcohol (Wenner and Jackson 2009: 5). In this sense, Heineken 0.0 could be depicted as to an extent challenging the notion that refusal of alcohol is somehow a failure of masculinity (Conroy and de Visser 2013). Having said that, perhaps the 'damage' to masculinity is mitigated here through the fact that the men shown in this material tend to be hyper-masculine, successful figures whose masculinity is not threatened by *temporary* consumption - because they are working or driving - of NoLo products.

In contrast, Seedlip was felt by most participants to be targeting female consumers. This again was partly tied to the product itself, as Seedlip provides similar consumption cues to the femininised spirit gin despite not explicitly positioning itself as a 'gin substitute'. The use of nature-themed imagery, the overall aesthetic, the colour palette and the arty illustrations of flowers and woodland animals were also felt to be designed to appeal to women, and the marketing was described as 'soft' (Adam, 37) and 'feminine' (Ed, 42). The associations between class and gender were also prominent in participant discussions, with Seedlip described as targeting 'young professional' women (Alice, 32) or 'socialites':

> *"…a 'Made in Chelsea', kind of, do you know what I mean? High socialite, that kind of thing. I think it's what you see a lot in Covent Gardens or places like that, or like The Ivy… I just think that is the audience they are almost going for. That expensive, modern kind of vibe"*
>
> **(Hannah, 30)**

Ed (42) also mentioned The Ivy as did Georgie (22), who described Seedlip as 'trying to capture the people who enjoy the finer drinks in life'. Gender and class were often entangled in discussions of Seedlip in ways that were less apparent – or less clear-cut – in discussions of Heineken 0.0; Ed (42) suggested 'Heineken has got your sports, working men connotation' but other participants felt a little more ambivalent about whether Heineken 0.0 was trying to appeal to a particular social class, or felt the product could be targeted at *both* working and middle-class men. In contrast,

Seedlip was clearly associated with young (female) professionals, 'classy' drinkers and middle-class women (and perhaps implicitly with whiteness, although participants did not mention issues around race and ethnicity). Participants also felt the high price point of Seedlip was a 'deliberate' marketing technique to position it as a 'status' drink (Zara, 42) (Jackson et al. 2020). This reinforces norms around drinking that position 'girly' drinks as both feminine *and* classy and make wider associations between 'appropriate' femininity and respectability, classiness and self-control (Lyons and Willott 2008). Just as 'gender and social class intersect and are embedded in identity and drinking practices' (Lennox et al. 2018: 14), associations between femininity and sophistication or 'classiness' are threaded through Seedlip's marketing through imagery showing or implying the consumption of Seedlip in upmarket cocktail bars or as part of fine dining experiences.

Other social norms

Participants were aware of the UK's dominant drinking culture and the presence of social norms around drinking (Bartram et al. 2017b). Heavy or binge drinking was recognised by all as an embedded aspect of British culture (Griffin et al. 2009) and associated with a myriad of social occasions (Graber et al. 2016); 'everything revolves around booze' (Alice, 32) and 'it is very difficult to do much that doesn't involve it' (Ed, 42). The normalisation of drinking was frequently noted through descriptions of drinking as just 'the thing that you do' (Emma, 31), with Luke (29) noting with frustration that 'alcohol is the only drug that you have to come up with a reason for *not* consuming'. Participants who grew up in the UK described similar initiations into drinking cultures where drinking was a normalised, unquestioned rite of passage. With drinking associated with sociability and fun in alcohol marketing (Szmigin et al. 2011), another widely recognised stereotype was around the positioning of the non-drinker as 'boring' (Romo 2012). The ongoing stigma around sobriety was also noted (Cherrier and Gurrieri 2013; Herman-Kinney and Kinney 2013).

Participants felt that the expansion of the NoLo market was a positive development that might challenge some of these assumptions or stereotypes, for example, through normalising the idea that not everybody drinks and helping to break down the stigma that associates sobriety with addiction. The existence of credible, desirable NoLo options was felt to be 'inclusive' (Georgie, 22), offer genuine alternatives for non-drinkers and make them feel 'catered for'. Liam (26) described what he called a 'mainstreaming' of NoLo; a conscious effort by the alcohol industry to 'shift it into the mainstream, and into people's consumption habits'. Several participants also described their own attitude towards NoLos shifting as they became more mainstream; for example, Alice (32) said the increased availability and normalisation of NoLos meant she was more likely to continue drinking them (as part of a hybrid model) after her current pregnancy. Some of the marketing material studied may also help to reinforce the notion that non-drinking is a credible – or even desirable – choice, as suggested through the aspirational material offered by Seedlip.

However, in other ways the expansion of the NoLo market might do little to challenge social norms. Some participants positioned NoLos below alcohol in a hierarchy of drinks, recognising that the public may struggle to see the 'point' of NoLos and themselves slipping into using language such as 'knock-off', 'fake' or 'pretend' to describe NoLos (positioning them as somehow as inferior to a 'proper' drink). Some participants also drank NoLos at times to appease drinkers or make them feel more comfortable (see Pavlidis et al. 2019; Romo et al 2015), with Jacqueline (68) noting that some of her consumption choices are made 'for other people's feelings'.

Previous research identifies the importance of conforming to group norms around drinking; the consumption of NoLos may help non-drinkers to feel they are not 'letting the team down' (Bartram et al. 2017a: 450) or rejecting the 'symbolic meanings' attached to drinking (2017a: 449).

> *"I'm always pleased that I can have something that I know I'm going to like and keep people who are drinking alcohol company and happy so that they're not just saying, "Oh don't have water, have something stronger"*
>
> **(Jacqueline, 68)**

Other participants recognised that NoLo consumption could allow them to 'pass' as drinkers (see Nairn et al. 2006) or keep non-drinking 'unnoticed' (Adam, 37) or 'on the down-low' (Luke, 29). For example, Georgie (22) talked about holding a bottle of NoLo in a particular way to 'hide' the label in social settings 'so it looks like you're drinking'. Non-drinkers may be challenged for their choice to refuse alcohol or regarded as 'deviant' (Herman-Kinney and Kinney 2013), so it is unsurprising that at least some NoLo consumers may feel a degree of pressure to appease others or to 'pass' as a drinker in social settings. This may of course reinforce – rather than challenge – the 'cultural myth that an alcohol-type beverage is required for social conformity' (Miller et al. 2021:3). Participants' desire to consume something very similar to alcohol in terms of taste, smell and appearance may limit the potential to challenge social norms through non-drinking, whilst the desire to drink NoLos in traditional drinking contexts – for example with friends, to mark the transition to the weekend – highlights how entrenched some of these social norms continue to be.

Finally, the use of particular marketing strategies such as addition marketing may reinforce social norms that associate alcohol consumption – i.e. 'the real deal' – with traditional drinking settings whilst also expanding the contexts in which an alcohol-like product can be consumed. In this sense, social norms that position drinking alcohol in spaces such as the workplace as inappropriate might ultimately start to break down too if products that smell, taste and look like alcohol become increasingly visible and permitted in these settings. As Corfe et al. argue 'the potential for NoLo drinks to normalise drinking culture, including in scenarios where drinking is traditionally seen as taboo (such as in the workplace)' (2020: 59) is a concern (although it is worth noting that consumers do not necessarily welcome or accept the encroachment of NoLo products into non-drinking spaces).

Considerations for Policy Debates

Exacerbating harm? Alibi marketing, social norms and addition marketing

Alibi marketing remains a key concern raised in research on alcohol marketing, particularly in relation to sports sponsorship (Murray et al. 2018; Purves and Critchlow 2021). The data indicated the continued investment of Heineken in sports sponsorship, including through tie-ins with football and motor-racing. Participants themselves raised concerns about alibi marketing, arguing Heineken 0.0 closely resembles its alcoholic counterpart and any advertising for Heineken 0.0 is by default promoting the company's wider brand and flagship beer. Some explicitly expressed concerns that alibi marketing might be used to bypass current or future regulation of alcohol marketing. Clearly, such findings have the potential to exacerbate alcohol harm through enabling the promotion of alcohol brand marketing by 'stealth' in new settings with less regulation (Corfe et al. 2020), with research showing that alibi advertising may expose non-consumers (including those below the legal drinking age) to alcohol brands and demonstrating links between exposure to alcohol marketing and initiation of drinking (de Bruijn et al. 2012). Such advertising may also encourage consumers to develop an allegiance to products that are produced by the alcohol industry and may resemble their alcoholic counterparts in taste and appearance (Miller et

al. 2021), with research identifying links between a strong sense of brand allegiance and heavier consumption (Casswell and Zhang 1998).

It could be argued that the expanding NoLo market represents a positive development that helps challenge social norms around drinking. The increasing visibility and presence of viable and desirable alternatives to alcohol in drinking spaces may break down the associations between drinking, fun and socialising embedded within a UK 'culture of intoxication' (Griffin et al. 2009). Whilst participants recognised these possibilities and the aspirational marketing of a product such as Seedlip might help to position certain NoLo products as high-status or 'cool', there is also a risk that social norms and dominant alcohol industry messages around drinking may be *reinforced* through NoLo marketing and consumption. The fact that NoLos continue to so closely resemble alcohol in terms of appearance, taste and presentation was valued by consumers, *but* may do little in practice to challenge dominant drinking cultures. There was also evidence from the data that NoLos might be consumed to fit in with, appease or pass as drinkers (Nairn et al. 2006), reinforcing the notion that 'everybody drinks'. Miller et al. (2021) note that the expectation that an alcohol-type beverage is needed in social situations to fit in may do little to reduce alcohol-related harms and may just further embed the links between alcohol, socialising and fun. The depiction and promotion of NoLo products that often clearly resemble alcohol on social media may also be effective in reaching consumers under the legal drinking age and in reinforcing social norms around drinking (Kauppila et al. 2019), with research indicating that alcohol brands' presence on social media normalises drinking cultures and strengthens pro-drinking attitudes (Moewaka Barnes et al. 2016). This is likely to hold true for NoLos particularly when they are associated with a flagship alcohol product and alcohol brand.

Addition marketing represents another cause for concern. Through opening up *new* opportunities to drink, companies promote consumption patterns that may exacerbate alcohol harm through normalising the consumption of products like alcohol (and ultimately alcohol itself) in new contexts and settings, or through positioning NoLo products as 'healthy' options whose consumption can be linked with sport, dieting or exercise. However, despite an addition model being promoted through some of the material studied, participants expressed scepticism towards the idea of creating new drinking occasions and there was no real evidence of NoLos being consumed on top of existing alcohol consumption, despite this finding being reported elsewhere (Miller et al. 2021). This suggests that addition material in marketing may not filter down to or shape consumer practices and may even be disregarded completely.

As NoLos remain subject to less regulation than alcohol (Porretta and Donadini 2008), it is imperative that action is taken in the UK to review and potentially restrict the ways and contexts in which NoLos can be promoted. One option would be to focus on brands rather than ABV; so a NoLo product from a 'parent brand' that primarily markets alcohol is subject to the same marketing restrictions as the alcoholic product despite the lower alcohol content. Other potentially useful measures adopted in Sweden include a ban on advertising NoLos in ways that might allow for them to be in any way 'confused' or even associated with full-strength products (Kaupilla et al. 2019) (although the realities of policing this and deciding what constitutes too strong an 'association' may be difficult). Similar issues have emerged in France where the introduction of the Évin Law to prevent alcohol marketing in sport may be circumvented by the use of more general brand marketing; for example, UEFA EURO 2016 football sponsor Carlsberg were still able to display their – slightly adapted - slogan 'probably… the best in the world' in their brand colour and font during matches as the direct reference to 'beer' had been removed (Purves et al. 2017). These examples highlight some of the ongoing challenges associated with the regulation of alcohol and NoLo marketing.

Alleviating harm? Hybrid drinking and public health messages

There was evidence from the data that some consumers may be replacing alcohol with NoLo products and wish to drink NoLos in ways that mirror how alcohol is consumed (rather than opening up new drinking occasions). Some adopted 'hybrid' approaches where they might switch from alcohol to NoLos at certain times or in certain settings. In speculating on the possible effects of the expanding NoLo market, Rehm et al. (2016) consider switches amongst drinkers to NoLo alternatives on *some* occasions as a way to reduce overall consumption (and perhaps therefore ultimately reduce alcohol-related harm); there was some evidence that these kinds of practices are taking place. The expanding NoLo market was welcomed by all participants and was felt to offer choice and flexibility, especially for drinkers who were seeking to maintain more moderate relationships with alcohol. The strategic incorporation of NoLos into participants' drinking routines was regarded as positive and useful, helping them to control and manage their drinking levels and make 'future-focused' choices whilst maintaining a 'balanced' relationship with alcohol. Similarly, some of the current non-drinkers felt that having access to a range of NoLos supported them in both long and short-term efforts at sobriety.

Public health messages may be able to capitalise on some of these findings, drawing on the ways in which consumers are using NoLos to help support a shift to 'healthier' consumption patterns and lower overall levels of alcohol consumption. Firstly, campaigns might more explicitly encourage 'hybrid' consumption models or provide more explicit illustrations of what hybridity/moderation could look like in practice. Evidence suggests current guidelines are not necessarily adhered to and many campaigns are ineffective in their ability to alter drinking patterns (Babor et al. 2010, cited in Yeomans 2019); setting particular guidelines around weekly 'limits' in terms of unit consumption may be too vague and abstract to encourage change. Research also suggests definitions of 'moderate' and 'responsible' drinking remain vague and poorly understood (Green et al. 2007; Yeomans 2013), with many drinkers thinking about consumption in relation to drunkenness or embodied effects rather than monitoring unit consumption. In contrast, there may be value in promoting 'hybrid' or 'flexible' drinking models that do not require consumers to count units but rather to set guidelines that work for them in terms of their consumption (such as drinking NoLos instead of alcohol during the week or switching to NoLos for home drinking). As Conroy and de Visser suggest, 'not drinking during some social occasions might act as a spring board for more moderate future consumption' (2018: 593) and help to break down some of the entanglements between alcohol, fun and socialising.

Participants clearly and enthusiastically identified *both* short and long-term benefits of NoLo consumption, and non-drinking and moderate drinking were positioned as a rewarding, 'positive and proactive choice' (Graber et al. 2016: 79). Public health campaigns might benefit from further emphasising the *benefits* of reduced consumption, moving away from a more 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/moderate drinking as a rewarding experience in and of itself and to consider how the gains or benefits of non-drinking/moderate drinking might be experienced in both the long and short term (Yeomans 2019).

Thirdly, the potential role of NoLo products in supporting longer-term non-drinkers could be further explored. Whilst there is some contention around the appropriateness of drinking NoLos during sobriety – with some working in the treatment sector or with more traditional recovery models viewing NoLo consumption

as a triggering step towards relapse (Corfe et al. 2020) – those 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 my earlier research with women in early sobriety (Nicholls 2021; 2022).

Corfe et al. acknowledge that the increased uptake of NoLo drinks in these kinds of hybrid ways 'could generate significant health improvements' at an individual level (2020: 4), noting that 'a third of those that had consumed NoLo drinks in the last 12 months cited cutting back on alcohol as a key reason for drinking these products' (2020: 31) when they surveyed alcohol consumers. However, they caution that the scope for population change is limited, noting that heavier drinkers are more likely to say drinking NoLo drinks has not reduced their overall alcohol consumption. Other research indicates sales of light and NoLo alcohol products are driven by more affluent households (Anderson et al. 2021b). These findings suggest that encouraging NoLo consumption may not be an effective strategy to support those drinking heavily or in 'at risk' ways and that any potential benefits of the expanding NoLo market may disproportionately affect drinkers with a higher socioeconomic status. Furthermore, 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. The overall market share of 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 for example) (Anderson et al. 2020) and previous research suggests drinkers rate the appeal of a beverage as declining when it features labels such as 'low' or 'light' (Vasiljevic et al. 2018b). 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, whilst 79% said 'nothing' would make them more likely to try one (Corfe et al. 2020). Whilst NoLos were popular amongst participants in this self-selecting sample, they may continue to hold limited appeal to some parts of the population and are unlikely to be an appealing option for those deliberately seeking the effects of alcohol such as intoxication or lowered inhibitions (Miller et al. 2021). This clearly indicates that the UK government strategy to 'nudge' consumers towards NoLos and expand the market is only a partial step towards addressing alcohol harm and must be undertaken alongside wider measures.

Conclusion

This report builds on the somewhat mixed picture presented in research around NoLos, expanding a limited but emerging evidence base and highlighting some of the complexities and nuances that surround the question 'does the expanding NoLo market exacerbate or ease alcohol-related harm?'. The increasing availability and promotion of NoLos may bring both benefits and challenges.

On the one hand, certain marketing practices such as addition and alibi marketing may perpetuate alcohol-related harms. NoLos may also be promoted in ways that draw on health claims or associate them with sport, exercise or healthy lifestyles, may target particular gendered audiences and may reinforce social norms surrounding alcohol. The continued presence of products that so closely resemble alcohol may perpetuate the myth that 'everybody drinks' – particularly if NoLo consumers seek to 'pass' as drinkers – or that an alcohol-like product is required in particular settings.

On the other hand, consumers are likely to value the expanding NoLo market and may feel that the increased availability of NoLo products can help them to sustain their goals and intentions in relation to (non)drinking. Consumers may also value NoLos for reasons relating to their similarities to alcohol and their differences from alcohol and may work to challenge ideas of non-drinkers as boring or position themselves as connoisseurs who can appreciate aspects of NoLos such as taste without needing the intoxicating effects of alcohol.

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. A case study approach was adopted to focus the scope of the project within time and staff constraints and allow two prominent products with recent marketing campaigns to be considered. These case studies should be interpreted as a snapshot of practices around the promotion of two leading NoLo products. 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. The self-selecting nature also means the data likely reflects the views of those who have opinions about NoLos that they wanted to share, including some who felt very passionate about them. 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 or with potentially very difficult relationships with alcohol are not reflected here. Nonetheless, the research presented helps to further develop a small evidence base and it is possible to draw conclusions and offer a number of recommendations for policymakers and public health campaigners.

As others have argued, public health campaigns would 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). The data suggests that two approaches that might be particularly useful for public health messages include: a) providing examples of concrete and specific measures drinkers might take to reduce alcohol consumption through substitution (such as swapping alcohol for NoLos during the week or at home) rather than simply supplying information on recommend weekly unit intake; and b) promoting the short *and* long-term benefits of NoLo consumption, non-drinking or reduced drinking and avoiding the use of tactics that focus primarily on the dangers and risks of heavy drinking.

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, with less than 1% of UK households purchasing NoLos between 2015 and 2020 (Kokole 2021). 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.

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Appendices

Appendix One: Categorisation and analysis of case study posts

Instagram Snapshot on 29 March 2021:

	Category (Heineken 0.0)	Category (Seedlip)
Followers	557,000	5,858
Posts	495	738
Posts in sample timeframe	300	532
Posts selected for analysis	40	40

Stage One – categorisation of Instagram posts

Each post was grouped into a primary category. For Heineken 0.0, the frequency and percentage of posts about their NoLo offering year on year was also considered across 2018 – 2020. An increase in the percentage of posts was noted, increasing from just 3% in 2018 and 12% in 2019 to 24% in 2020.

Category	Number
Sport	11
Productivity / workplace	10
Dry January	5
Seasonal or time-specific	4
Driving	3
Film/ TV	2
Refreshment	2
Relax	2
Social media	1
TOTAL	**40**

Category	Number
Nature and conservation	14
Restaurants and bars	9
Cocktail recipes	4
Stockists	3
Ingredients	3
Brand	2
family business	2
seasonal / holiday	2
Dry January	1
TOTAL	**40**

Stage Two – content analysis of hashtags

Content analysis of the use and frequency of hashtags across all posts. These were also grouped into categories and showed some overlap with the overall post categorisations (for example for Heineken 0.0, 'sport' and 'productivity' were the top three categories for posts and hashtags, whilst for Seedlip, 'nature and conservation' was in the top three categories for posts and hashtags).

Top 3 hashtags

Heineken00	Heineken	16
DryJanuary	Heineken	6
mondaymotivation	Heineken	3
nowyoucan	Seedlip	3
seedlip / seedlip drinks / seedlip cocktails	Seedlip	23
nonalcoholic	Seedlip	12
cocktail(s)		6

#category (Heineken 0.0)	Freq
Sport	20
Product	18
Productivity	12
Seasonal / holiday / day of the week	11
Sobriety	8
Film and TV	7
Social media trends	2
TOTAL	78

#category (Seedlip)	Freq
Product	37
Sobriety	23
Nature and conservation	21
bar/restaurant/cocktails	20
Exclusivity / expertise	10
Urban	7
Travel	7
Other	4
Seasonal / holiday	4
TOTAL	133

Stage Three – thematic analysis

Thirdly a thematic analysis was conducted of all Instagram material. Firstly, thematic groupings were made of overall posts including text or speech (in captions, hashtags and appearing as speech or text on any videos). Secondly, the imagery, video and visual content were analysed more specifically (for example use of sporting imagery; inclusion of product / bottle).

Initial coding framework Heineken 0.0:

Initial Themes	Indicative Subthemes
Sport	Football
	Motor-racing
Productivity	Non-drinking contexts / choice
	Productivity and control
	Workplace
	Health and fitness
Time and space	Monday / new day / any day
	Friday / weekend
	Seasonal / holiday
	Dry January
Driving	
Taste / flavour / quality	Taste
	Refreshing
Film and TV	
Relaxation	Break
	Relaxing imagery
Gendered cues or messages	
Imagery	Product mainly (or only)
	Sporting imagery
	Productivity imagery
	Unexpected scenario / turn bottle
	Celeb / film
	Bar or pub imagery

Initial coding framework Seedlip:

Initial Themes	Indicative Subthemes
Nature	Farming
	Flowers, plants and gardens
	Nature general
	Conservation
	Ingredients (natural)
Productivity	Non-drinking contexts / choice
Food and drink / urban / restaurants and bars	Food pairings
	Collaborations or offers with bars and restaurants
	Awards / exclusivity
	Stockists / pop up shop
Time and space	Midweek
	Seasonal / holiday
	Dry January
	The future
Expertise	
Taste / flavour / quality	Taste / quality
	Ingredients
	Recipe / cocktail
Imagery	Product mainly (or only)
	Bar or pub imagery
	Paired with food
	Nature imagery
	Cocktail
	Homemade bottles
	Illustration or artwork
	Ingredient image
	Stockist
	Family / heritage
	Bottle or glass in garden or field

Once initial themes were derived, the remaining marketing material for each product was subjected to similar thematic analysis (of text, video, speech and imagery) and the themes continually adapted and revised accordingly. Once all material had been incorporated into themes for each product, all themes were examined together and reworked in order to produce a single table incorporating themes spanning both products and attending to the research questions:

Themes	Subtheme
Substitution and expanding temporal and spatial opportunities for consumption	'Beer moments' / 'new drinking occasions'
	Spatial expansion and 'new drinking occasions' – exercise / driving / workplace
	Temporal expansion – 'anytime' / weekdays
	Associations with alcohol / substitution for alcohol
Benefits of consumption	Productivity / control
	Choice / inclusion
	Fitness / health
	Taste / refreshing / quality / ingredients
Lifestyle / image / identity	Sport
	Masculinity
	Femininity / gender
	Nature / conservation
	Urban – restaurants, bars, food and drink
	Exclusivity and expertise
	Heritage
	Future
Consumption cues and guidelines	Driving
	Viewing or doing sport / exercise
	Reward / break / relaxing
	Work
	Dry January
	In bar or pub
	How to drink / cocktails / recipes

Appendix Two: Detailed overview of participant consumption practices

Pattern of consumption at time of interview	Participant	Self-definition	Reason for consumption patterns	Class
Exclusively drink NoLo, short-term (defined period of sobriety)	Alice (32)	Drinker (D)	Pregnancy. Planning to resume drinking but reflected on whether she might continue to drink NoLos at times	Middle
	Pete (38)	D	Year off drinking (health and fitness) for 2021. Planning to resume drinking	Middle
	Nina (45)	Moderating Drinker	Dry July. Questioning wider relationship with alcohol and hoping she can drink moderately in future	Middle
Exclusively drink NoLo, long-term (stopping drinking as long-term or permanent choice)	Adam (37)	Former Drinker (FD)	Sober for 10 months, connected to mental health. No plans to resume drinking	None
	Luke (29)	FD	Sober for 7 months, health scare from his previous drinking. Unsure about future relationship with alcohol	Working
	Suzanne (52)	FD	Sober for 4 years after a number of dry spells, suffered very bad hangovers. No plans to resume drinking	Middle
	Hannah (30)	FD	Sober for 1 month, connected to mental health (sees herself as a hybrid drinker in future having a very occasional drink)	Middle
Hybrid model (drink a mix of Alcohol and AF drinks)	Emma (31)	D	Drinks alcohol as a treat and NoLo as a substitute for drinking without the ill effects when she doesn't want to feel tired or hungover	Working
	Christiaan (41)	D	Drinking NoLo linked to running/race training but also wider health choices	None
	Liam (26)	D	Drinks NoLo at home or when out, doesn't currently drink alcohol at home (largely connected to mental health and wellbeing)	Working
	Ed (42)	D	Drinks NoLo during the week and alcohol at weekends (largely for reasons relating to productivity and health)	Middle
	Georgie (22)	D	Drinking NoLo whilst on a health kick, drinks alcohol for special occasions and a bit more now lockdown is easing	Middle
Hybrid model (but drink almost exclusively NoLo and consume alcohol rarely or very rarely)	Rob (34)	FD	Mostly sober since 2019, does drink very occasionally	Middle
	Jacqueline (68)	Low level Drinker	Prefers the taste of NoLo drinks, but will drink alcohol a few times a year	Middle
	Zara (42)	FD	Drank NoLo drinks during pregnancy and breastfeeding, now not drinking at all during 'fitness mission', but anticipating a return to hybrid drinking (mostly NoLo)	None

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