

# Do alcohol-free drinks help heavy drinkers cut their drinking?

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# 1. Executive Summary

- Alcohol Change UK conducted an online survey in 2022 into the importance of ‘alcohol-free’ drinks to those people who are cutting back on their drinking. The survey was designed to recruit exclusively hazardous and harmful drinkers who had attempted – or were currently attempting – to cut back on their drinking. This was successful, with 1,456 out of 1,478 responses meeting this criterion.
- Our primary research question was: “What proportion of the harmful and hazardous drinkers who are/have been on a drink reduction journey believe that ‘alcohol-free’ drinks are/were an important element in their success?”
- **‘Alcohol-free’ drinks were found to be important for most harmful and hazardous drinkers who trying to reduce their consumption in this sample.**
- 83% of people who were cutting back found AF drinks to be important to that, in this sample.
- 53% found AF drinks “essential” or “very important” to their attempt to cut back.
- The use of ‘alcohol-free’ drinks was associated with success in moving from higher to lower drinking categories for the majority of the sample.
- **‘Alcohol-free’ drinks were shown to help people of all ages, income levels, and genders in this sample.**
- The main reasons given for why AF drinks help people to cut back were:
  - To help people to socialise.
  - Because they enable people to successfully manage their cravings while their body and brain adjusts to not drinking or drinking less.
  - Because they are a familiar and positive taste, but without the negative effects of the alcohol.
  - Because they enable people to replace a negative habit with a new healthier habit, rather than simply removing something.
- The people in the sample that find AF drinks did not help them, gave these reasons:
  - Because they don’t contain alcohol and that’s my only reason for drinking.
  - Because they act as a trigger and lead to wanting the ‘real’ thing.
  - Because they are too expensive.
- The sample found the availability of AF drinks to be good in the off-trade, poor in the on-trade.
- A large part of the sample found AF drinks to be over-priced, especially in the on-trade.
- The vast majority of the sample (85%) expect ‘alcohol-free’ to mean 0.0% ABV (zero/no alcohol at all) (45%) or 0.05% ABV (trace) (40%). Fewer than 6% believe that ‘alcohol-free’ should mean 0.5% ABV. **If policy-makers wish to build confidence in the alcohol-free drinks market and secure the positive benefits, this finding must be embraced and ‘descriptors’ must marry with these public expectations.**
- Further research is needed into the hypothetical negative effects of ‘alcohol-free’ drinks.
- ‘Alcohol-free’ drinks should be seen as potentially important factor in alcohol harm reduction, and one that has probably been under-estimated to date.
- Policy development should seek to maximise the positive and minimise the negative effects.
- Certain policy actions could encourage greater use of alcohol-free drinks by hazardous and harmful drinkers: pricing controls, government messaging, managed marketing, greater availability, descriptors that match public expectations and meaningful support for existing initiatives that work, like Dry January®.
- Any policy action on AF drinks should be part of a cross-Government strategy to end alcohol harm through other effective measures: increased pricing of alcoholic drinks; better regulation of alcohol labelling, marketing, underage online sales, and licensing, and proper funding for alcohol treatment services.

## 2. Introduction

### 2.1. Why this research?

Alcohol Change UK's Behaviour Change Programme helps many thousands of harmful and hazardous drinkers to take control of their drinking before they get to the point of needing specialist alcohol treatment. The programme works by combining behavioural science with cutting-edge digital tools that are co-developed with users. There are four main digital tools:

- the Try Dry® app (over 530k downloads since launch in Oct 2018)
- our two private online community forums (over 18k users)
- our daily 'coaching' email during Dry January® (received by 53,845 people in Jan 23)
- our collection of blogs of a wide range of people with a huge diversity of experiences and change journeys (90,468 people visiting these in 1/4/22-31/3/23).

Over the past three or four years, we have seen an explosion in the numbers of people visiting the 'alcohol-free' drinks<sup>1</sup> reviews section of our website, from 7,292 (2018) to 233,305 (2021) visitors per year, without any real increase in our promotion of these.

Over that same time frame, hundreds of heavy drinkers on our private online community forums have been saying that 'alcohol-free' drinks are playing an important role in their change to more controlled drinking. "I simply couldn't have done this without alcohol-free drinks" has been a typical comment.

As a charity, our significant engagement with heavy drinkers has convinced us that alcohol-free drinks are helpful to many people. We include reviews of these drinks on our website and have developed commercial partnerships with companies that produce and sell these drinks (unless they also sell alcoholic drinks). But as an evidence-based organisation we needed to better understand the *scale* of this, so that we can place neither too little nor too much emphasis on them and ensure we are providing the best guidance to harmful and hazardous drinkers. Posts on our community forums *may* be indicative of something happening, but this is not a reliable indicator of the scale.

The idea that 'alcohol-free' drinks are effective in behaviour change is consistent with research into health habits which indicates that 'replacement' is a more effective strategy than 'removal' (Adriaanse et al 2011, Hartmann-Boyce et al 2022, Gardner et al 2012, Lally et al 2008, Webb & Sheeran 2006, Wood & Neal 2007). However the majority of research in health habit formation has focused on eating (swap in a healthy snack) and smoking (replace with e-cigarettes). We have not found any similar research on the role of 'alcohol-free' drinks.

### 2.2. Research question

Our primary research question was:

"What proportion of the harmful and hazardous drinkers who are/have been on a drink reduction journey believe that 'alcohol-free' drinks are/were an important element in their success?"

Our subsidiary research questions were:

1. *Why* do people feel 'alcohol-free' drinks to be important/unimportant in their drink reduction?
2. How *frequently* do people consume 'alcohol-free' drinks?
3. What do people think about the current availability of 'alcohol-free' drinks, be venue types?
4. What do people think about the current pricing of 'alcohol-free' drinks, be venue types?
5. How do people manage situations where 'alcohol-free' drinks are not available?
6. How much alcohol do people think an 'alcohol-free' drink should contain?

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<sup>1</sup> We define 'alcohol-free' drinks in the next section, Research Methods. 'Alcohol-free' is a contested term, so appears in scare quotes. This research directly addressed consumer expectations of the meaning of 'alcohol-free'.

### 2.3. Key context

Alcohol Change UK has identified eight potential (hypothetical) effects of ‘alcohol-free’ (AF) drinks on alcohol harm. Our warm thanks to Professor John Holmes, University of Sheffield and Dr Emily Nicholls, University of York, who have both provided input which helped us to refine this model.

1. **Replacement Effect** (positive) – the idea that people replace alcoholic drinks with non-alcoholic drinks, whether for reduction, moderation or sobriety.
2. **Additionality Effect** (neutral) – the idea that people drink these drinks on top of their alcoholic drinks. This has no direct positive or negative impact on alcohol harm. This is the marketing strategy of some key alcohol-free brands.
3. **Trigger Effect** (negative) – the idea that the taste or the ritual triggers people in recovery or who have had, for example, liver treatment, to start drinking again.
4. **Brand Building Effect** (negative) – the idea that if a country has looser rules on the marketing of AF drinks, companies that choose to produce AF-versions of existing alcohol brands can promote their wider brand, putting brand elements of their alcoholic products into contexts where they would not otherwise be allowed.
5. **Induction Effect** (negative) – the idea that parents and other adults give alcohol-free drinks to young people, introducing them to the taste and ritual of beer/wine/spirits at a younger age and/or to more young people, and that this in turn increases the consumption of the alcohol-containing version of these drinks once the taste or ritual is acquired.
6. **Inequalities Effect** (negative) – the idea that, while the Replacement Effect is positive, it might mainly benefit wealthier parts of the population, exacerbating health inequalities.
7. **Bleeding Effect** (negative) – the idea that the Additionality Effect, while itself neutral, might lead to people drinking AF drinks in more situations where alcohol doesn’t normally exist (e.g. breakfast cafes) and this in turn might lead to other people believing those drinks to be alcoholic drinks, which in turn increases the normalisation of the consumption of alcoholic drinks in these situations.
8. **Policy Distraction Effect** (negative) – the idea that that the benefits of the Replacement Effect distract Government for other essential policy changes or are even are used as an excuse, by Government or the alcohol industry, to say they are acting on alcohol harm while failing to progress other effective policy changes to reduce alcohol harm.

In responding to the phenomenon of ‘alcohol-free’ drinks, Alcohol Change UK wants to see the strongest *net positive* effect. That means maximising the Replacement Effect and minimising any of the negative effects (3 to 8).

*Research is needed into all these possible effects.* In particular we need to understand which of the negative effects are real rather than hypothetical, which are significant and which are minor, and how any more significant effects can be effectively mitigated. Having a richer understanding of these issues will assist Alcohol Change UK, the Government and others to develop a more positive policy environment, ensuring that ‘alcohol-free’ drinks deliver the maximum positive impact and the minimum negative impact on alcohol harm.

This research report focuses on the Replacement Effect and as such is a partial contribution to this broader research need.

### Acknowledgements

We are hugely very grateful to Lucy Burke and Inge Kersbergen, School of Health and Related Research (ScHARR), University of Sheffield for support with the initial analysis and extremely helpful comments on an earlier draft. We are also very grateful to all our research respondents.

### 3. Methods

We conducted an online survey which was open for four weeks. The survey consisted of a total of 26 questions (Annex 1), although question logics meant that the maximum number of questions any one respondent had to answer was 16, with four additional optional questions about entering our prize draw or partaking in further research. There was a mixture of closed and open-ended response questions. The survey had five main sections:

- Current drinking, drinking at its heaviest, status of drink reduction journey and headline use of alcohol-free (AF) drinks
- Views on the importance of AF drinks in the drink reduction journey and the reasons for that
- Views on the AF drinks market, namely the price and availability of AF drinks and the definition of 'alcohol-free'
- Socio-demographic data
- Prize draw; further research.

Our sampling approach was based on an intention *to only recruit people who have tried to reduce their drinking or are currently reducing their drinking*. Alcohol Change UK has unique access to a large population of people that meet these criteria. We emailed people who had used some or all our behaviour change programme, such as the Try Dry app and our daily coaching emails and invited them to take part. We also promoted the survey on our online forums and wider social media. Recruitment used the phrase 'Are you currently trying to reduce your drinking? Or have you tried to in the past?'. We offered a prize draw, with one respondent chosen at random to receive a £50 cash prize.

98.5% of survey respondents were either currently reducing their drinking or had previously attempted to reduce their drinking, indicating that we were successful in targeting the right population.

The survey defined alcohol-free drinks: "By alcohol-free drinks we mean drinks like beer, cider, wine, or spirit with no more than 1.0% alcohol by volume (ABV), although most have 0.5% ABV or less. We do not mean water, orange juice, cola, etc." We know that the phrase 'alcohol-free' means different things to different people and indeed this was a key research question.

#### Limitations of the research

- Recruiting our sample from people who have come across Alcohol Change UK *might* mean they are more likely to have come into contact with AF drinks than other people involved in drink reduction, potentially increasing the proportion of the sample that have tried AF drinks and that value these drinks. This may *not* be a limitation. Our observation of heavy drinker forums in other environments, e.g. the US, shows that alcohol-free drinks are constantly referenced by heavy drinkers there despite Alcohol Change UK not being present. But it is possible.
- The sample may also have been, to some degree, a self-selecting sample: made up people with stronger opinions (either way) about alcohol-free drinks. In hindsight our recruitment messaging should have been silent that the research was about 'alcohol free' drinks.
- The sample is heavily weighted towards women.
- The 'drinker type' categories are not validated, not used in other research (so less useful for comparison with other studies) and not necessarily mutually exclusive. We selected them knowing this, because they are based on the types of definitions used by drinkers themselves on our online communities, are more relatable to survey participants and are more meaningful than, say, the AUDIT-C.
- The overall sample size was too small to draw conclusions about some key socio-demographic dimensions: race, sexuality and disability.
- Our analysis is primarily descriptive and has not yet been subjected to more complex statistical analysis.

## 4. Sample

We received 1,478 responses.

### 4.1. Socio-demographic profiles

Table 1 summarises the socio-demographic profile of our sample. Our sample is not representative of the general population, nor is it intended to be. It is a sample of people who have tried or are currently trying to reduce their drinking.

Women, higher-earners and white people are prominent in the sample. This could partly reflect the fact that these groups are more likely to take action to reduce their drinking and could partly be explained by biases in the recruitment methods (i.e. the sample may over-represent these groups, even taking into account that these groups might be more likely to take action to reduce their drinking).

**Table 1. Socio-demographic profile of the sample**

#### *Ethnicity*

Traveller	0.1%
Arab	0.3%
Black	0.5%
Other	0.8%
Asian	1.0%
Mixed	1.7%
White Irish	3.6%
White European	8.2%
White other	10.1%
White UK	73.8%

#### *Sexuality*

Asexual	4%
Bisexual	4%
Gay man	1%
Gay woman/lesbian	2%
Pansexual	0%
Queer	1%
Straight/heterosexual	83%
Prefer to self-describe	1%
Prefer not to say	5%

#### *Average annual household income*

under £20,000	11%
£20,000 to £49,999	32%
£50,000 to £99,999	36%
£100,000+	21%

#### *Gender*

Man	25.1%
Woman	74.9%

#### *Identify as Trans?*

Yes	0.4%
No	98.8%
Prefer not to say	0.8%

#### *Age*

18-34	10.0%
35-44	20.7%
45-54	29.1%
55-64	27.5%
65+	12.8%

#### *Disability*

I don't know	1%
Yes	9%
No	89%
Prefer not to say	1%

### 4.2. Drinking profiles

Respondents were asked to describe their drinking “currently” and “at its heaviest”. Chart 1 shows the overall pattern of the sample at both these moments.

If we look at the sample’s drinking “at its heaviest” (the pink bars), 993 of the 1,478 respondents (67%) were in one of the two riskiest drinking categories: daily heavy (685, 46%) or frequent binge (308, 21%) – the top two categories on Chart 1.

Looking at the sample's "current" drinking (the purple bars), only 341 people (24%) are in those two riskiest categories, and 895 (61%) are now drinking at or under the low-risk drinking guidelines (the bottom four categories on Chart 1). So the sample has reduced its drinking, in general (not everyone).

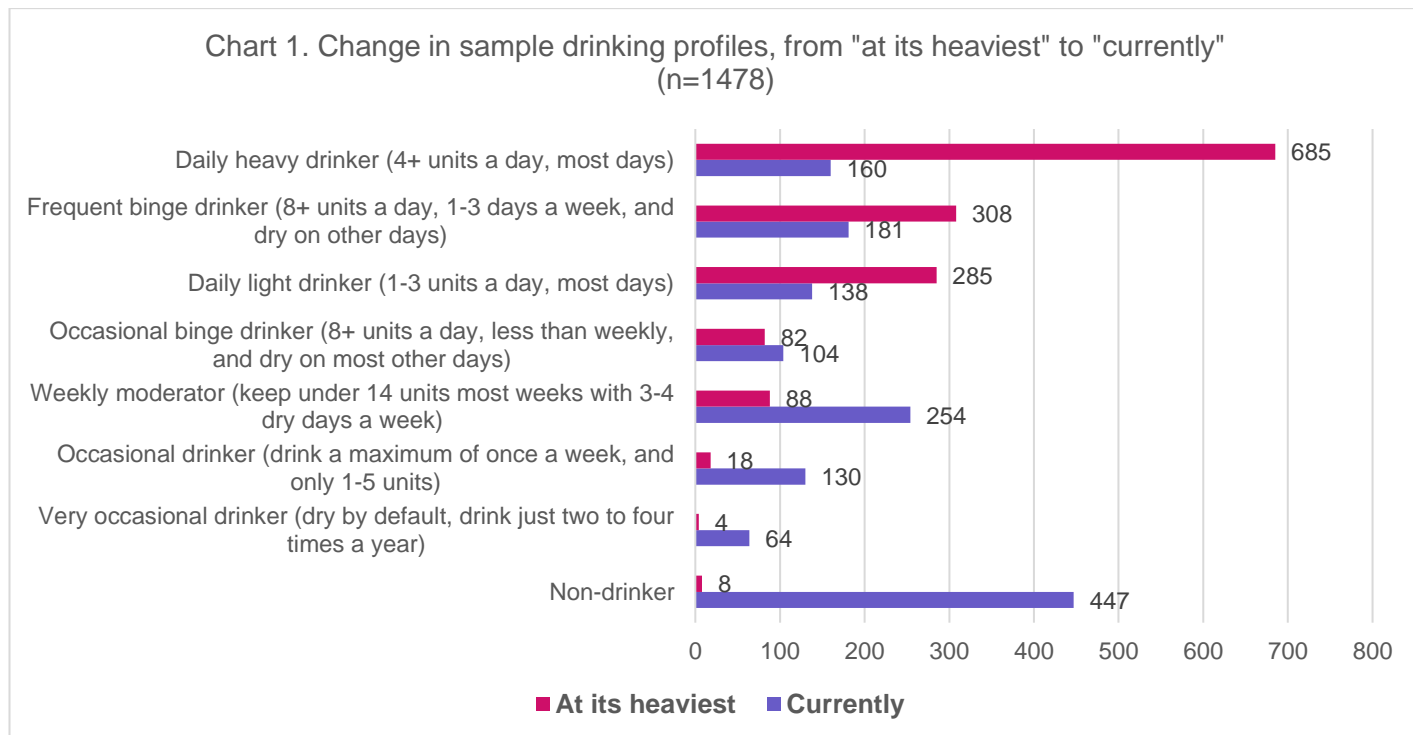


Chart 1 shows the sample as a *whole* at these two points, but does not map the specific changes for each member of the sample.

Table 1A gives more detail, showing how many people saw which changes from their heaviest drinking to currently. To read Table 1A, start with the column headings and select a column that shows where people's drinking was at its heaviest. Then work downwards through the rows for that column, to see where that cohort's drinking is currently.

Table 2A

Change in drinking, heaviest to currently		Heaviest								Total
		Daily heavy	Frequent binge	Daily light	Occasional binge	Weekly moderator	Occasional	Very occasional	Non-drinker	
Currently	Daily heavy	155	1	2	1	1	0	0	0	160
	Frequent binge	81	80	11	4	5	0	0	0	181
	Daily light	58	9	69	0	2	0	0	0	138
	Occasional binge	22	48	5	20	8	1	0	0	104
	Week moderator	74	42	84	16	37	1	0	0	254
	Occasional	30	24	34	14	16	12	0	0	130
	Very occasional	26	16	6	6	4	3	3	0	64
	Non-drinker	239	88	74	21	15	1	1	8	447
Total	685	308	285	82	88	18	4	8	1478	

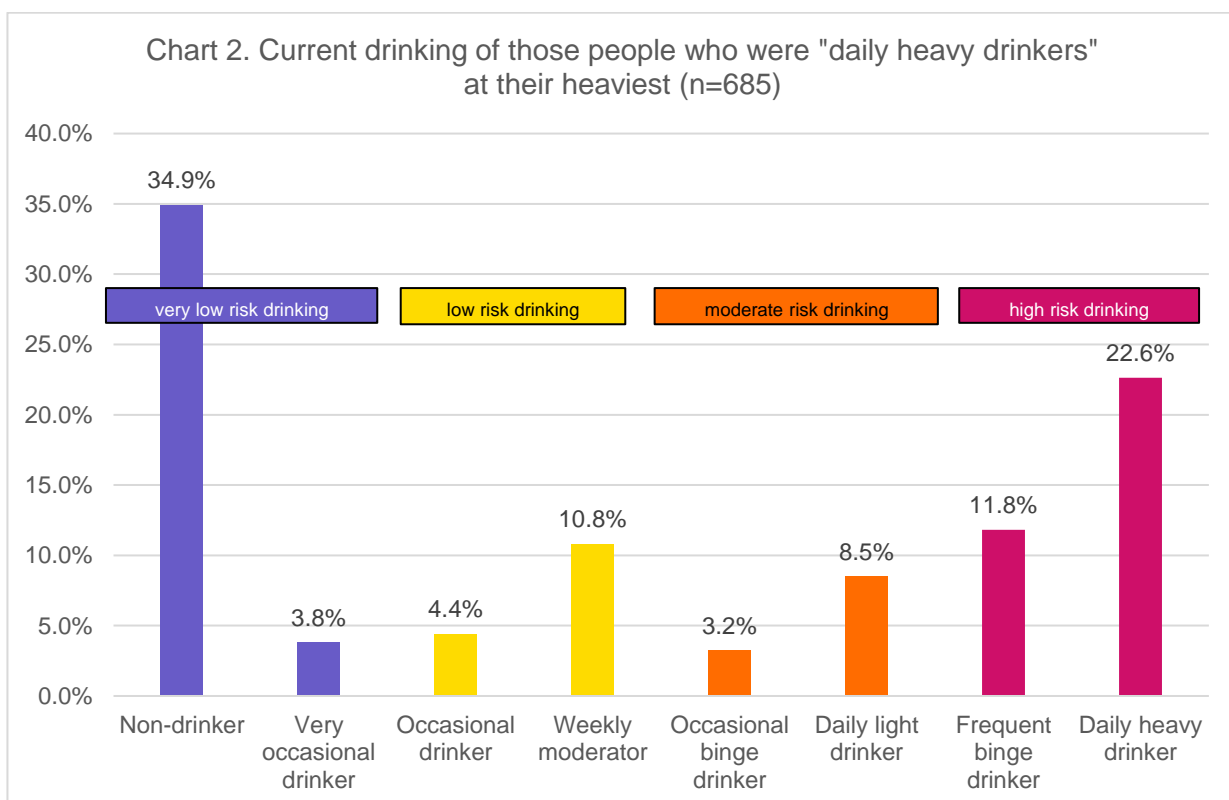
The largest group (239, 16%) was the people who moved from being daily heavy drinkers to non-drinkers. Around a quarter (26%) are in the same category currently as at their heaviest, highlighted in yellow, although this doesn't mean they are drinking the same actual amount. And a small number of

people (3%) appear to have moved to a higher drinking category (the pink area), but this is a result of our use of identity-based drinking categories that *overlap* and does not mean they were drinking more.<sup>2</sup>

Table 2B shows the same data as Table 2A, but with each cell as a percentage of the total (1,478).

Table 2B Change in drinking, heaviest to currently		Heaviest								Total
		Daily heavy	Frequent binge	Daily light	Occasional binge	Weekly moderator	Occasional	Very occasional	Non-drinker	
Currently	Daily heavy	10%	0%	0%	0%	0%	0%	0%	0%	11%
	Frequent binge	5%	5%	1%	0%	0%	0%	0%	0%	12%
	Daily light	4%	1%	5%	0%	0%	0%	0%	0%	9%
	Occasional binge	1%	3%	0%	1%	1%	0%	0%	0%	7%
	Weekly	5%	3%	6%	1%	3%	0%	0%	0%	17%
	Occasional	2%	2%	2%	1%	1%	1%	0%	0%	9%
	Very occasional	2%	1%	0%	0%	0%	0%	0%	0%	4%
	Non-drinker	16%	6%	5%	1%	1%	0%	0%	1%	30%
Total	46%	21%	19%	6%	6%	1%	0%	1%	100%	

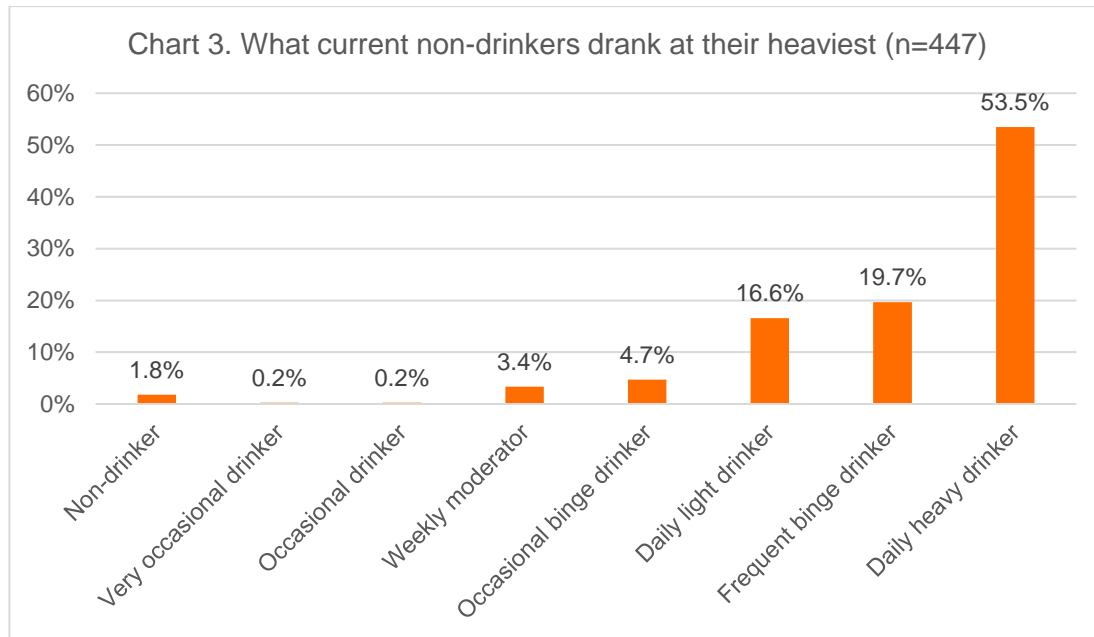
Many of these people have experienced major changes in their drinking. This is well illustrated by Charts 2 and 3. Chart 2 look at *just* the 685 people who were “daily heavy drinkers” at their heaviest; and shows their “current” drinking (it re-presents the data in column 1 of Table 2B). 77.4% of this cohort are now drinking at less risky levels and over a third of this cohort are now non-drinkers.



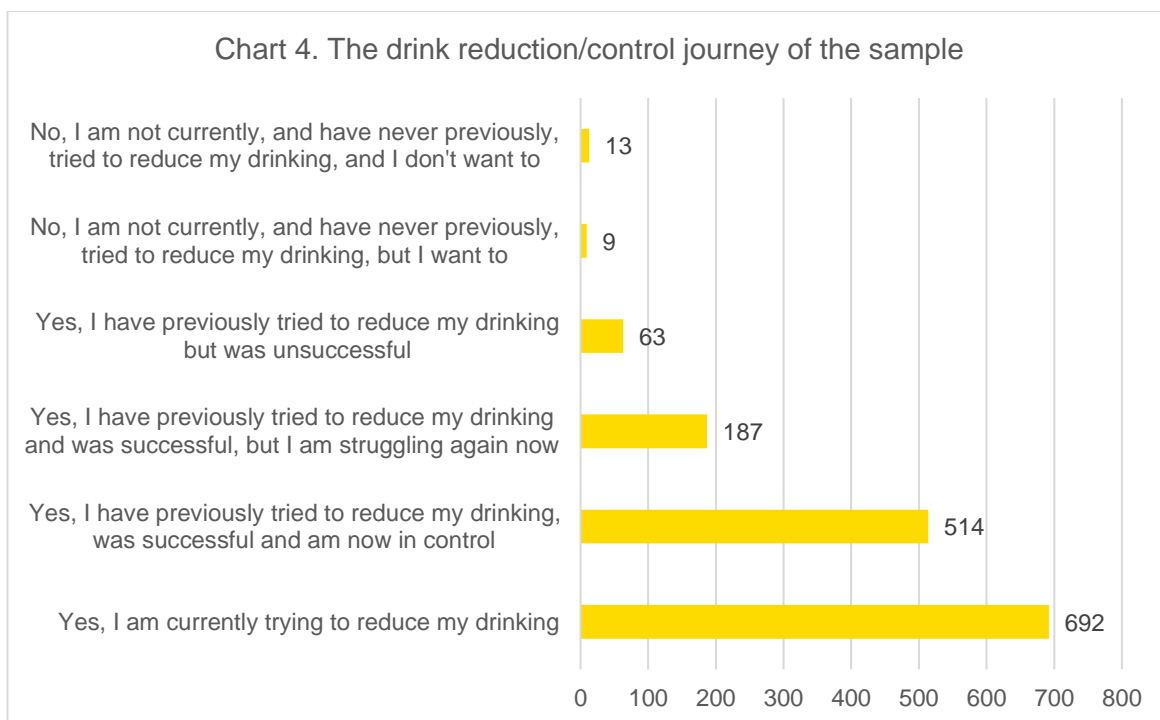
<sup>2</sup> The pink zones in Tables 2A and 2B *appear* to show people who are drinking at a heavier level, currently, than at their heaviest – which by definition makes no sense. This anomaly is caused by our use of identity-based drinking categories with definitions *in a range* (e.g. 1-3 units) and that overlap with each other. We’ve placed the eight categories into a particular order from the heaviest drinking (daily heavy) to the lightest drinking category, but this is imperfect. For example, our definition of ‘frequent binge’ (8+ units a day, 1-3 times a week, dry on other days) ranges from 8 to 24 units/week and overlaps with our definition of ‘daily light’ (1-3 units a day, most days) which ranges from 4 to 21 units/week. We don’t know if someone moving from ‘frequent binge’ to ‘daily light’ has increased, decreased or seen no change in their actual weekly drinking.



Chart 3 focuses just on those who are “currently” non-drinkers and looks back, at what they were drinking “at their heaviest” (reflecting the bottom row of table 2B). Over half were daily heavy drinkers and nearly three quarters (73.2%) were in one of the two high risk drinking categories.



Finally Chart 4 shows the drink reduction “journey” of the sample, against six categories. 1,456 of the 1,478 (98.5%) are either currently trying or had previously attempted, to cut back. In the data analysis that follows we exclude those 22 drinkers who have never tried cutting back.



Just under half the sample (692, 47%), are currently trying to reduce their drinking, while just over half (764, 52%) have tried cutting back previously.

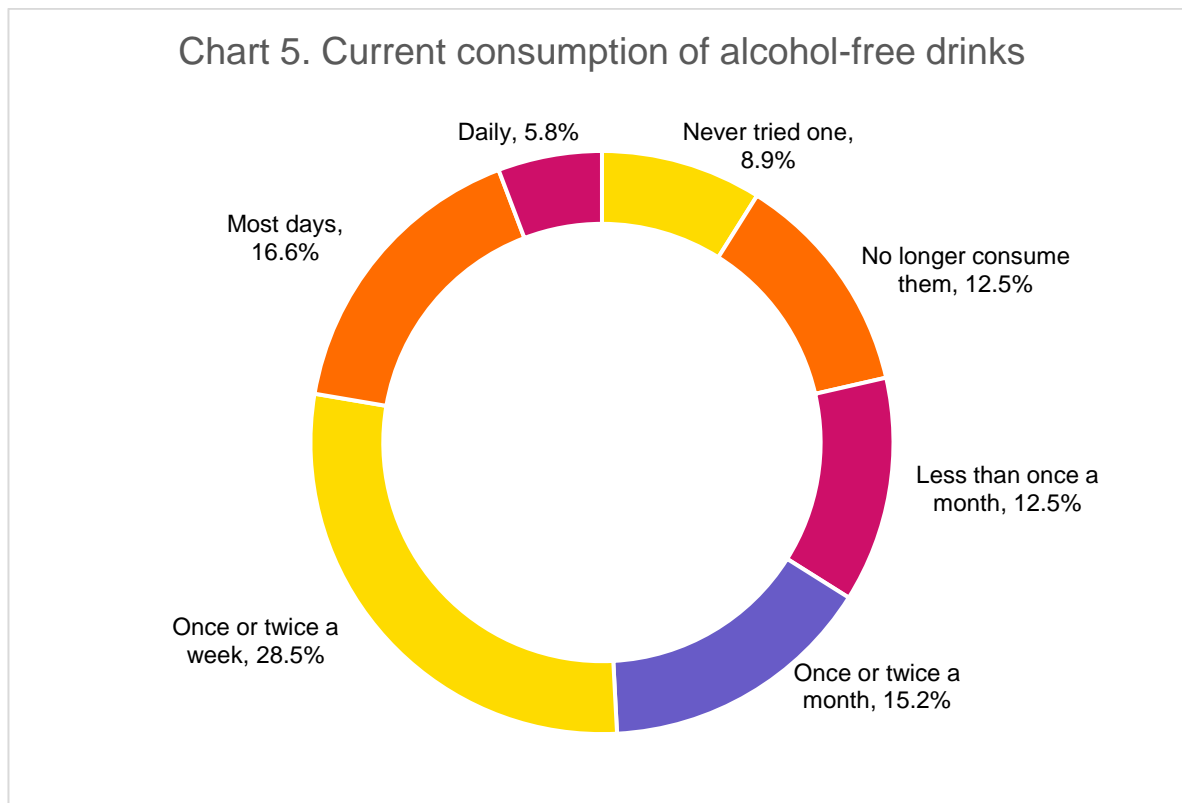
Of those 764 who have previously tried cutting back, 63 (8%) were not successful. 701 (92%) were successful, made up of 514 (67%) who were successful and feel they are still in control and 187 (25%) who were successful but are now struggling again.

## 5. Findings

### 5.1. Current use of alcohol-free drinks

Chart 5 shows the sample's current consumption of alcohol-free drinks (n=1,456). Half (738, 51%) said they were currently consuming an alcohol-free drink at least once a week, with over one-fifth (327, 22%) consuming an alcohol-free drink most days or daily.

A fifth of respondents said they did not currently consume them, with most of these people who had previously used them but now stopped (180, 12%) and the rest never having tried them (130, 9%).



### 5.2. Importance of alcohol-free drinks in reducing drinking

To analyse this question, we split our sample into three groups:

- The 701 people who had *previously* tried reducing their consumption and had been successful (even if some of them are struggling again now).
- The 692 people who were *currently* trying to reduce their alcohol consumption.
- The 63 people who had previously tried reducing their consumption but were *unsuccessful*.

We then removed the people who had never used AF drinks at all, to understanding the relative importance of these drinks on those who had tried using them.

*Previous succeeders (n=601)*

This group is particularly important, because they have been successful. Their views on the importance of alcohol-free drinks in that success are therefore particularly useful. They may also have the benefit of hindsight, giving a more reflective answer. However, there could be issues with weaker or lower quality recall, if their reduction journey was some time ago.

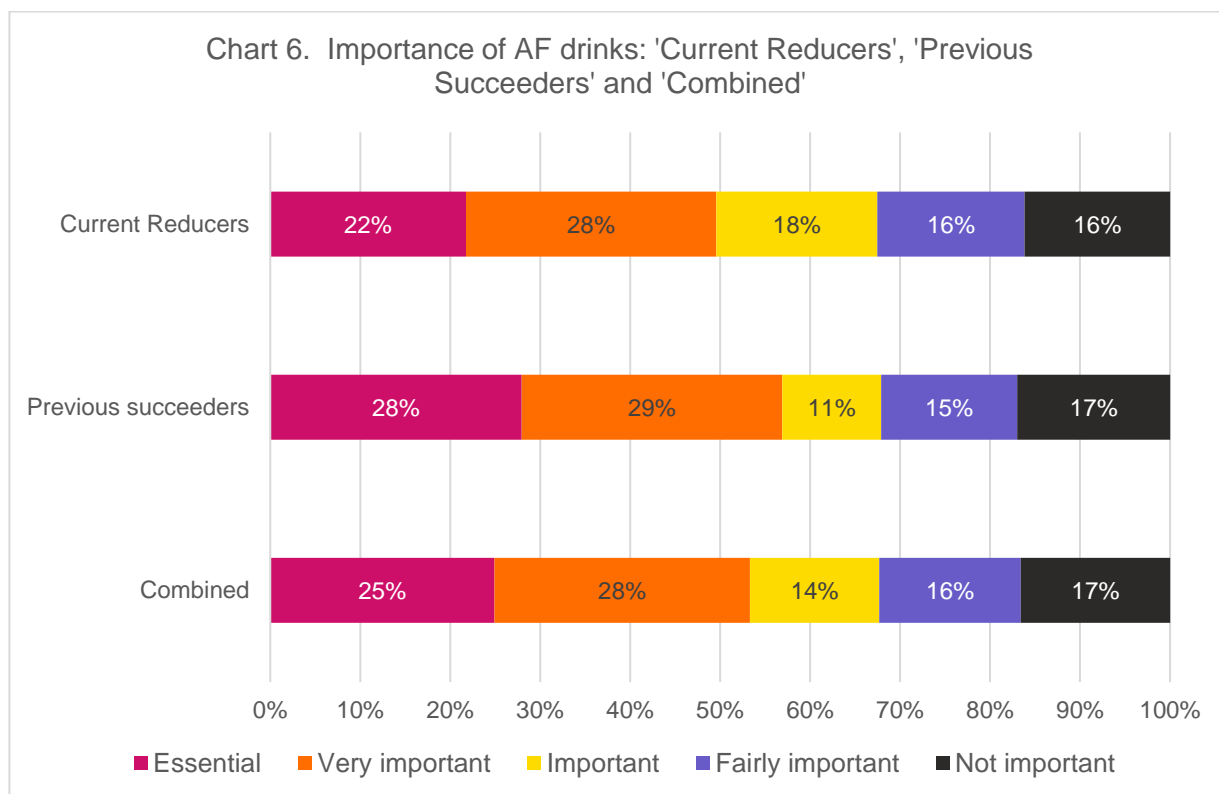
*Current reducers (n=575)*

This group have the weakness that they are in the middle of the process, so may not have the same levels of reflective hindsight as the previous succeeders. On the other hand, this group is less subject to problems of recall and, as their experience is 'live', their perspectives provide a valuable sense of what is happening whilst in the middle of a drink reduction journey.

*Non-succeeders (n=42)*

This group is also really important, because they were not successful, giving us a contrary perspective. As this is a much smaller group, we need to be particularly cautious with the findings. We also necessarily framed the questions slightly differently for this group.

Chart 6 shows the proportion of Previous succeeders and Current reducers that found/are finding AF drinks essential, very important, important, fairly important or unimportant in their reduction journey. It also shows the results from these two groups combined (n=1,176).



The results are very similar between the two groups. In total, 83% of Previous succeeders and 84% of Current reducers found/are finding AF drinks important to some degree.

The main differences are in the 'essential' and 'important' categories, with more Previous succeeders finding AF drinks 'essential' and more Current reducers finding them 'important'.

The combined results indicate **that 83% of people who try using AF drinks to help them reduce their drinking find them to be important to some degree**, with

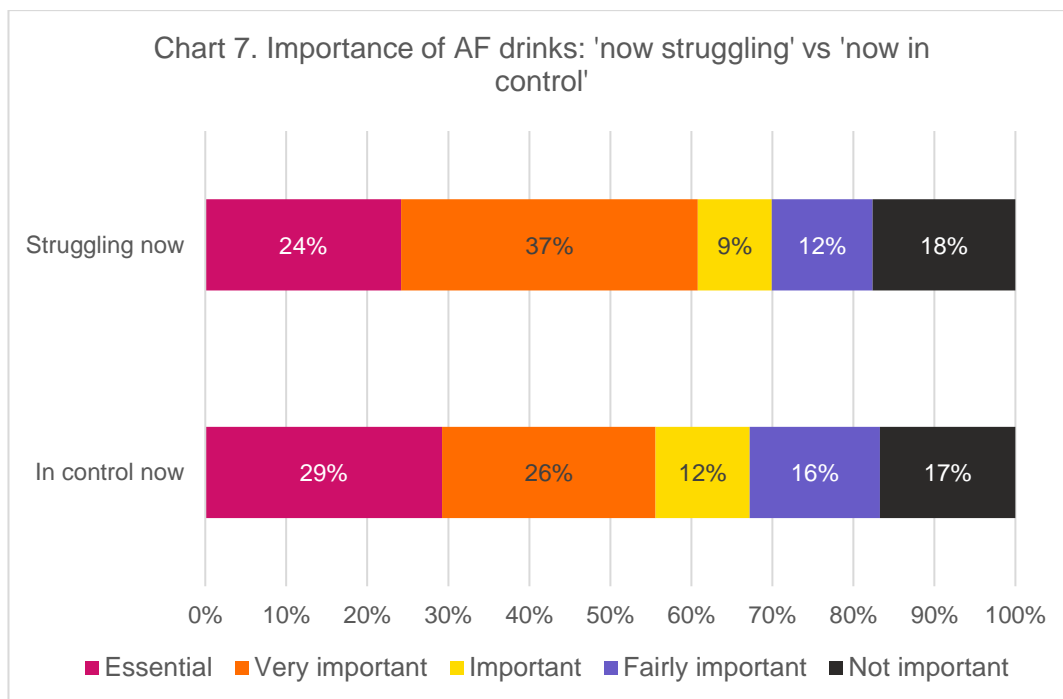
- 25% finding them 'essential'
- 53% finding them 'essential' or 'very important'
- 67% finding them 'essential', 'very important' or 'important'.

The 601 'Previous succeeders' group contain two sub-groups:

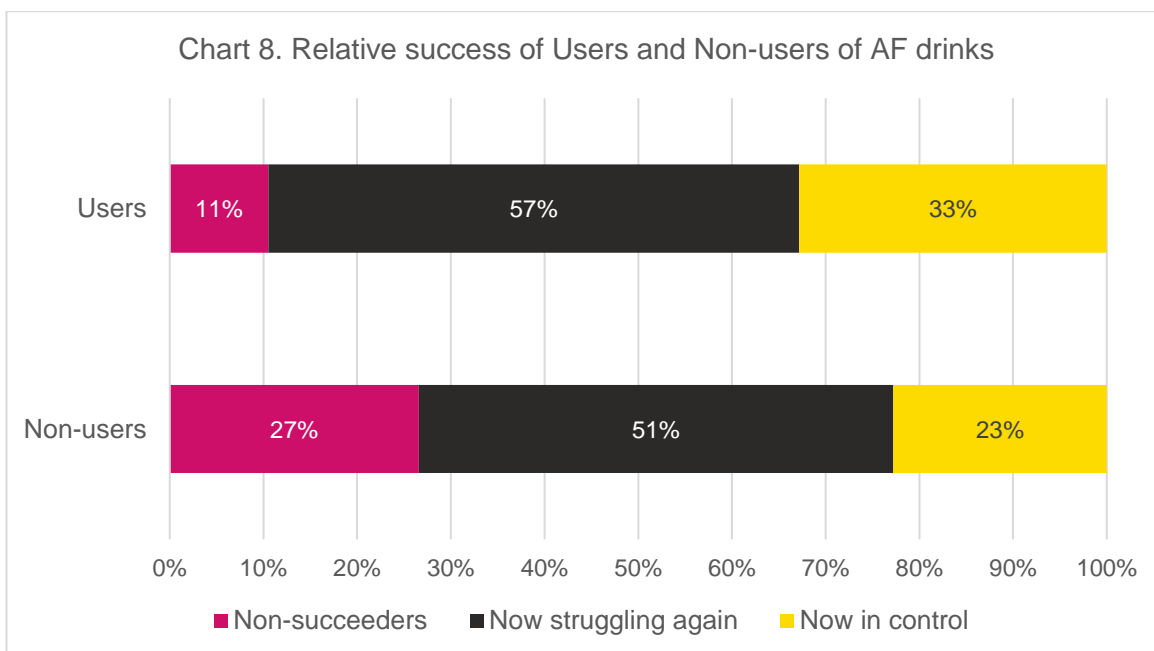
- Those who now feel in control (n=448, excluding those did not try using AF drinks)
- Those who are now struggling again (n=153, excluding those did not try using AF drinks).

Chart 7 takes a closer look at these two sub-groups. While the 'headline' figures are similar – 82% of people who are now struggling found AF drinks important to some degree, compared to 83% for those in control now – there are some differences in the detail. A slightly higher proportion of the 'now in

control' group found AF drinks 'essential' and 'fairly important'. A higher proportion of the 'now struggling' group found AF drinks 'important'. This data is probably slightly underpowered so this does not necessarily indicate anything of importance.



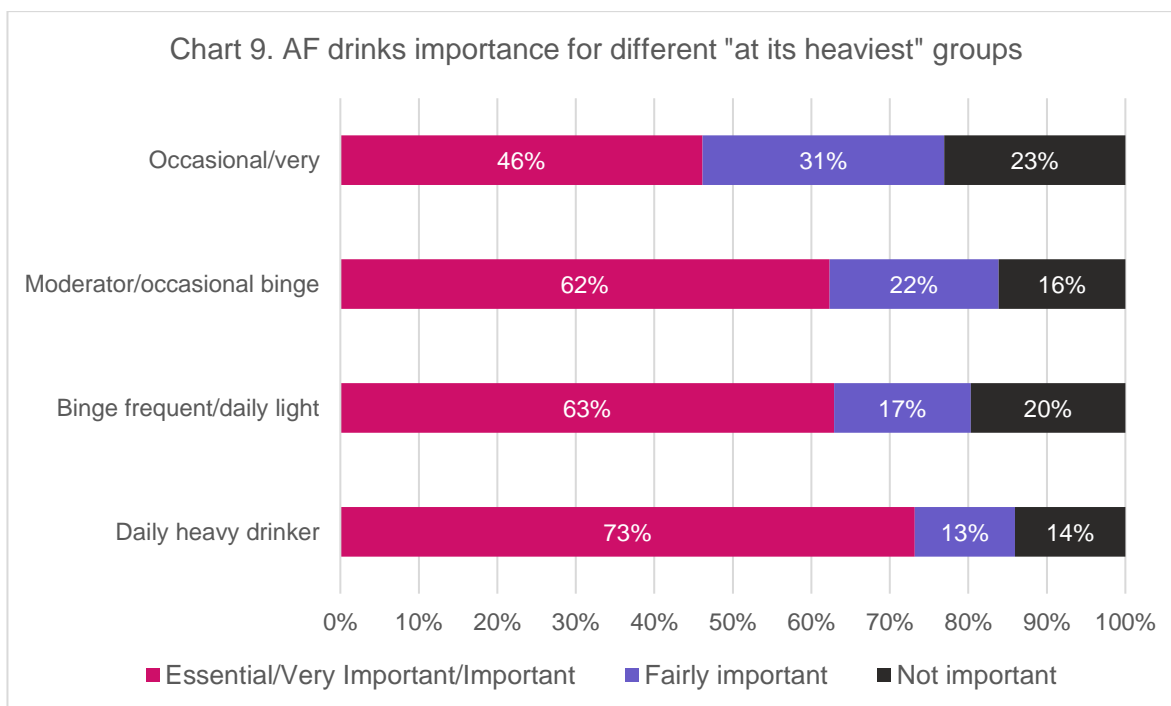
People who have not tried using AF drinks were temporarily removed from the analysis for Charts 6 and 7, to enable us to focus on the question of the importance of AF drinks for those who had tried them. Let us now look at those non-users of AF drinks and compare them with the users of AF drinks, for the three groups that have previously tried to reduce their drinking – the previous non-succeeders, the previous succeeders who are struggling again now, and the previous succeeders who are still in control of their drinking. These are shown in Chart 8.



The results show that non-users of AF drinks are more likely to be unsuccessful and less likely to end up in control of their drinking. This is not necessarily causation and there might be a third factor driving this association. More research is needed to better understand this pattern.

Finally in this sub-section, Chart 9 shows the relative importance of AF drinks based on the different drinking types of the sample when their drinking was at its heaviest. It indicates that **AF drinks are of most importance to the heaviest drinking groups**, especially the daily heavy drinkers, with 86% of this group finding AF drinks important to some degree. Nearly three quarter (73%) of daily heavy drinkers find AF drinks important, very important or essential.

The small group of people who were drinking occasionally or very occasionally at their heaviest, found AF drinks were less important in their efforts to reduce their drinking.

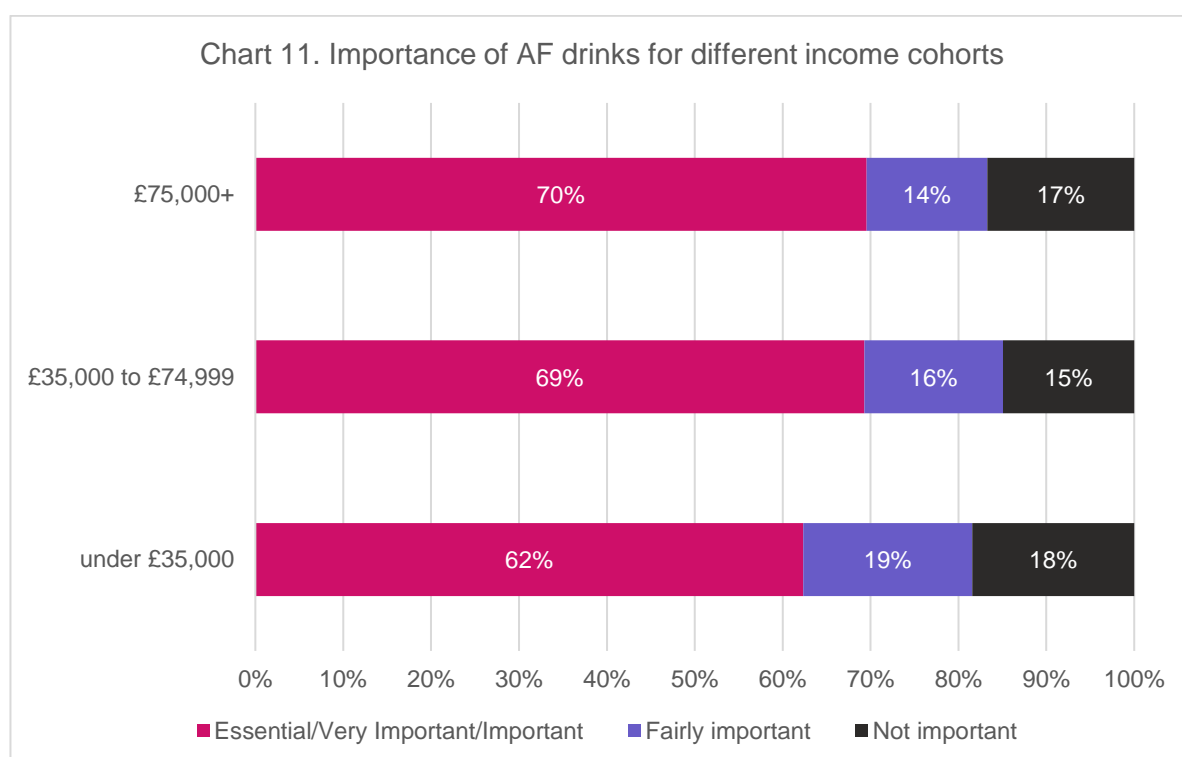
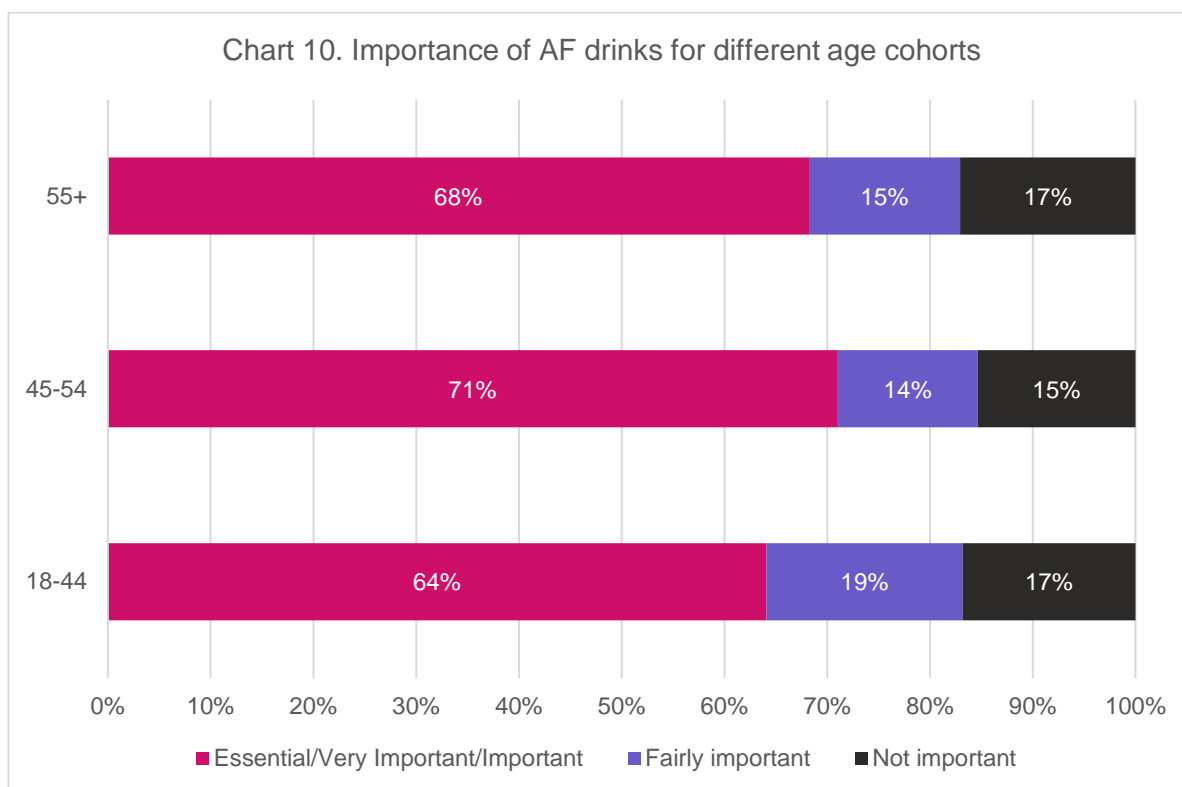


### 5.3. Socio-demographic group compared with AF drinks importance

Are there some socio-demographic groups for whom AF drinks are more important, or less? For sexuality, race and disability, the sample size of each cell was too small for analysis. However, there are enough data to produce results about AF drinks importance and gender; and for age and income if we combine some of the categories. The 'essential', 'very important' and 'important' categories have also been combined for the purposes of this analysis to ensure cell sizes are sufficiently large.

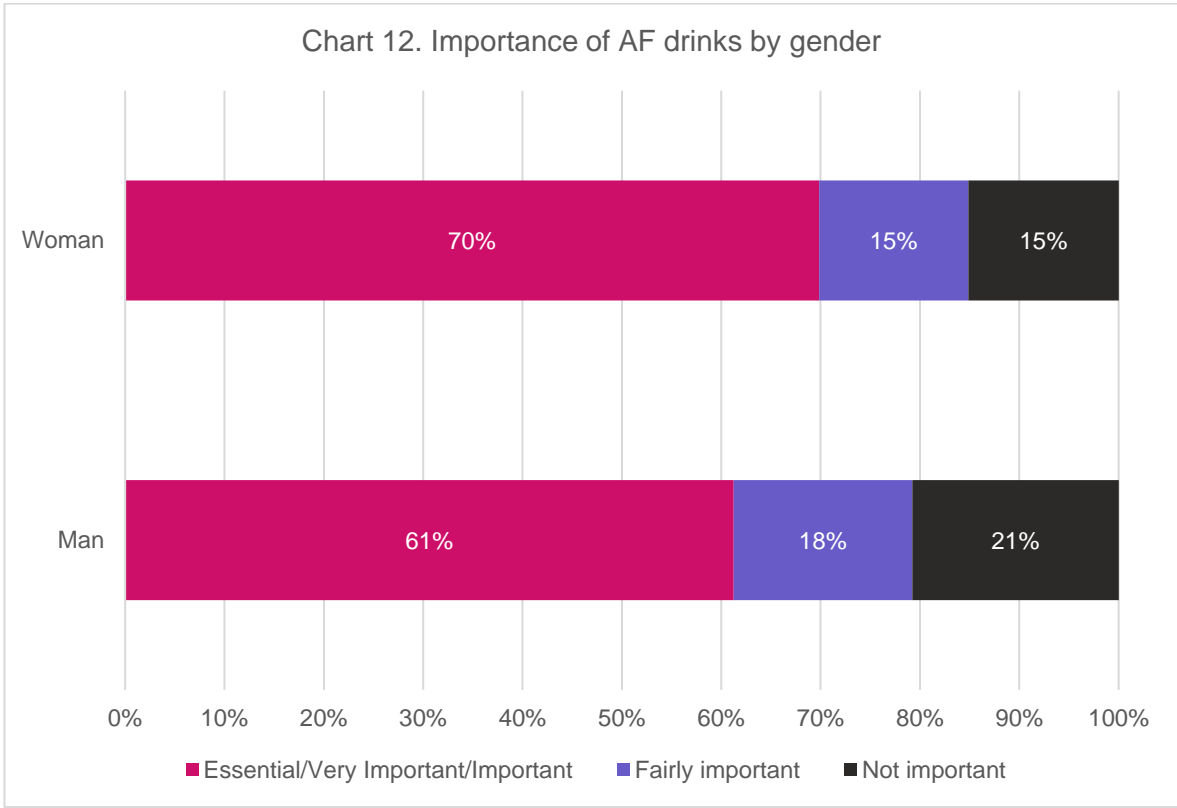
Charts 10 to 12 show the results. In general, there are no stark differences between the categories. As noted in the 'limitations' section above, it is also important to remember that these data have not yet been subjected to statistical analysis and it's possible that some or all of the differences described below fall within the margin of error and are not statistically significant.

In relation to age (chart 10), the two cohorts aged over 45 have a slightly higher proportion of people that find AF drinks essential, very important or important and the cohort aged 18-44 has a slightly higher proportion of people that find AF drinks only fairly important. In relation to income (chart 11), the two cohorts with annual household income over £35k have a slightly higher proportion of people that find AF drinks essential, very important or important and the cohort with annual household income below £35k has a slightly higher proportion of people that find AF drinks only fairly important. Indeed, the age and income cohort charts are quite similar, which might well relate to the fact that older people might be more likely to earn more, so it could be that income rather than age is the determining variable.

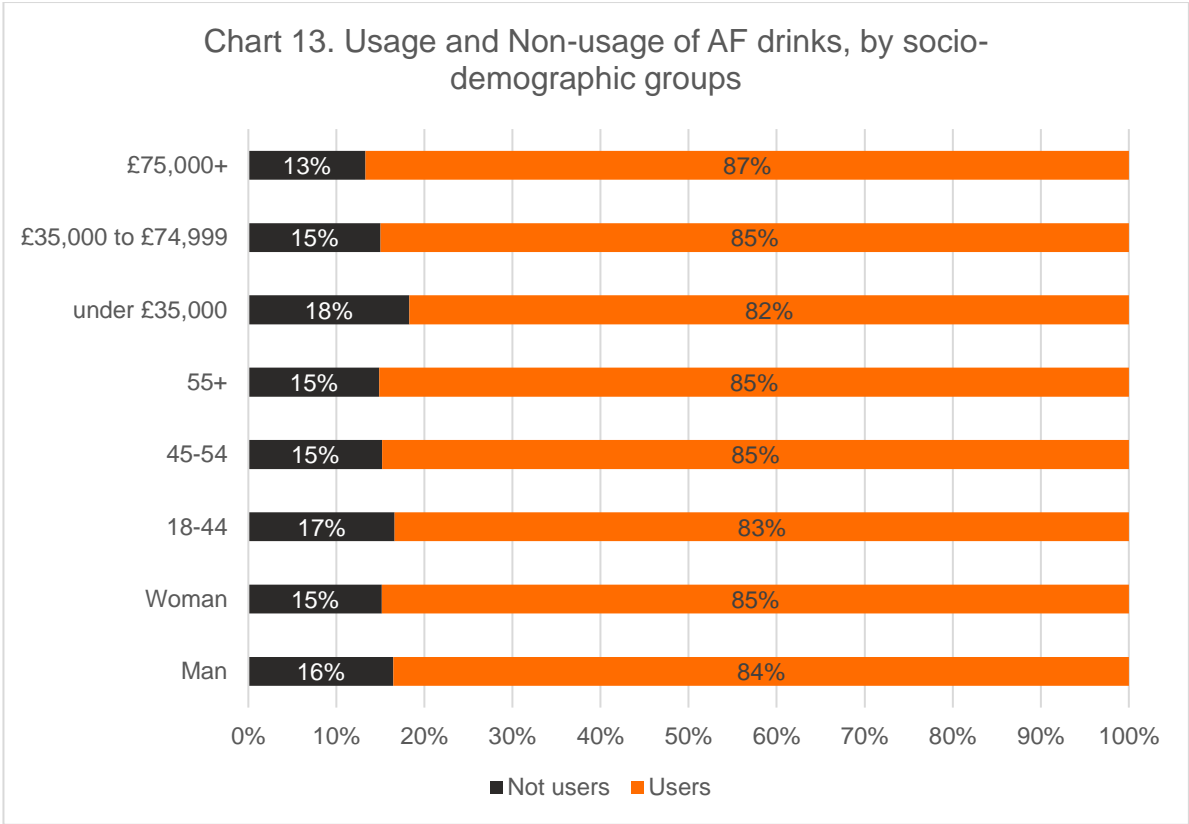


The most obvious distinction is between the proportion of men (Chart 12) finding AF drinks not important, which at 21% is one of the highest figures we've seen for any category on Charts 6, 7 and 9 above. This merits further research, especially given that previous research has suggested that men are more likely to drink these products than women.<sup>3</sup> This is unlikely to be because men are drinking more than women, as Chart 9 indicated that AF drinks were more important to heavier drinkers.

<sup>3</sup> Corfe, S., Hyde, R. and Shepherd, J. (2020), Alcohol-free and low strength drinks: Understanding their role in reducing alcohol-related harms. London, The Social Market Foundation.



We also looked at whether certain demographics were less likely to have tried AF drinks in the first place ('usage and non-usage' chart 13). There were no clear differences, with the slight pattern in relation to income (a higher proportion of people in wealthier households have used AF drinks than people in poorer households) unlikely to be statistically significant.



We asked the 130 people who had never tried AF drinks for the reasons why they hadn't tried them. Responses marked \* were prompted in the survey. The other responses were coded from free text 'other' responses.

**Table 3. Reasons why people haven't tried AF drinks**

Reason	Freq
I don't think the taste would be good enough to match the 'real' thing*	36
I think they are overpriced*	32
I am worried it will trigger me to want to drink a 'real' alcoholic drink*	29
I never really liked the taste of beer, cider, wine, spirits anyway, so don't want that taste*	16
Just not interested/don't see the point	11
I prefer soft drinks	9
The alcohol-free drinks that I would want are not available*	7
They have too many calories	6
I don't want my money going to alcohol-producing companies, even though these particular drinks don't contain alcohol*	5
I would be too embarrassed - my friends or family would laugh*	5
I only want the alcohol	4
I didn't know about them	3
I have been told not to, by a support group such as AA*	1
I have been told not to, by a doctor or alcohol treatment specialist*	0
I have read somewhere that it's a bad idea*	0

#### 5.4. Why AF drinks are important and unimportant to people reducing their drinking

We asked respondents for the reason why AF drinks were essential/important or unimportant in their attempts to reduce drinking. We identified four main themes why people found AF drinks essential or important.

The first theme was **the ability to still socialise without alcohol**:

*"I don't feel deprived, and I can still socialise without feeling I am missing out."*

*"It makes me feel more able to not drink (alcohol) in social situations."*

*"Alcohol-free beer helped me drink less or even no alcohol... without anyone (me or them) feeling uncomfortable."*

*"It's something to hold in social situations – makes me feel less anxious and people are less likely to offer me a drink."*

The second theme we identified was **taste**, especially having an **adult alternative** to traditional soft drinks:

*"I did not want coke or juice. Alcohol-free beer tastes so much better. Now I prefer the taste of alcohol-free beer over [alcoholic] beer."*

*"[AF drinks allow me] to have a grown-up drink in a nice glass – feel sophisticated etc."*

*"Having a grown-up tasting drink rather than sugary kids' sodas."*

The third theme was about **switching from an unhealthy habit to a healthier one**:

*"In the beginning, when I thought 'Oh, I'd like a beer', I'd say to myself 'go ahead, you can have one' and I'd have an AF beer. Now, it has become my new habit."*

*"I still have the 'routine' of relaxing with 'a drink' in the garden, at parties, dinners or the pub, but without the alcohol."*

*"I miss my wine 5 o'clock – the alcohol-free drinks still give me something 'special' to look forward to at that time of day."*



*“They scratch the itch.”*

The final theme was about the role of these drinks, with many respondents expressing the view that **their attempt to cut back or abstain would have been unsuccessful without these drinks**:

*“Has made me realise once the obvious craving for alcohol subsided after about a month, the ritual of making a drink was more important than the alcohol... Without AF drinks as props I doubt if I could have started this journey.”*

*“I would definitely lapse if I didn't have a non-alcoholic option.”*

*“By replacing the 6pm drink with [a] non-alcoholic option... it was vital to my stopping drinking alcohol.”*

These four themes were not mutually exclusive. Many respondents have the sense that alcohol-free drinks tasted good, allowed them to socialise with others, took out the alcohol without losing the ritual, enabled them to replace an unhealthy habit with a healthier one, and therefore were essential or very important in their change process.

We also identified four themes from those who found AF drinks unimportant. **Taste** was mentioned again here:

*“I don't find the taste comparable to the real version, so opt for fizzy soft drinks or water”*

*“I don't like the taste of alcohol free. I would rather have a good quality soft drink”*

*“They all taste rubbish!”*

Alcohol Change UK has substantial anecdotal evidence from other sources that people who have previously been heavy drinkers often need to ‘acquire’ the taste of AF drinks. A potential topic of further research would be to focus on this group who find taste problematic, to discover whether they can ‘acquire’ the taste of AF drinks given time, or whether they simply cannot acquire the taste and will continue to dislike the taste of AF drinks. This would be useful for practice.

For others, the issue of whether or not alcohol-free drinks taste the same or similar to their alcoholic counterparts was irrelevant: alcoholic drinks were consumed for their alcohol content not their taste, and therefore **the absence of alcohol made alcohol-free drinks seem pointless**:

*“It's not the taste of alcohol I miss, rather the effect.”*

*“I drink for the feeling alcohol gives me rather than the taste.”*

*“When (I was) drinking alcohol, it was for the buzz not the taste!”*

Related to this was a perception by some respondents that alcohol-free drinks are **too expensive**, given the absence of alcohol within them:

*“I begrudge paying as much for alcohol free as alcoholic drinks.”*

*“I don't see the point. Alcohol-free wine is the same price as normal wine. Why would I spend the same on something that isn't taxed the same but is the same price. Alcohol-free drinks are a rip off, just expensive pop/juice with a marketing plan! [I] think it's daft.”*

*“Why pay for non-alcoholic drinks at alcohol prices?”*

This reflects the ‘value’ that society places on alcohol. Despite being a toxic substance associated with a wide range of serious health and social harms, alcohol has been imbued with high value. It would arguably be a good thing if, over time, drinks with alcohol in them came to be seen as *less valuable*, and drinks without alcohol were seen as being of more value.

Finally, some respondents associated alcohol-free drinks with alcohol and therefore sought to avoid them for fear they **may act as a trigger** to consume alcohol again:

*“If you drink alcohol free versions of drinks that normally contain alcohol you are still telling your brain that it wants those drinks.”*

*“Using a substitution was damaging to my abstinence mindset. I wanted to create new patterns/habits, not mimic my drinking habits with an alcohol-free substitute.”*

*“When I did Dry January 3 years ago, I substituted my daily wine with alcohol-free drinks. I completed the month alcohol free but the following January I decided not to use AF drinks, as I realised I was just continuing with a ‘glass in hand’ habit and found I need to break this reliance by not opening what still looked like a bottle of wine.”*

## 5.5. Views on the AF drinks market

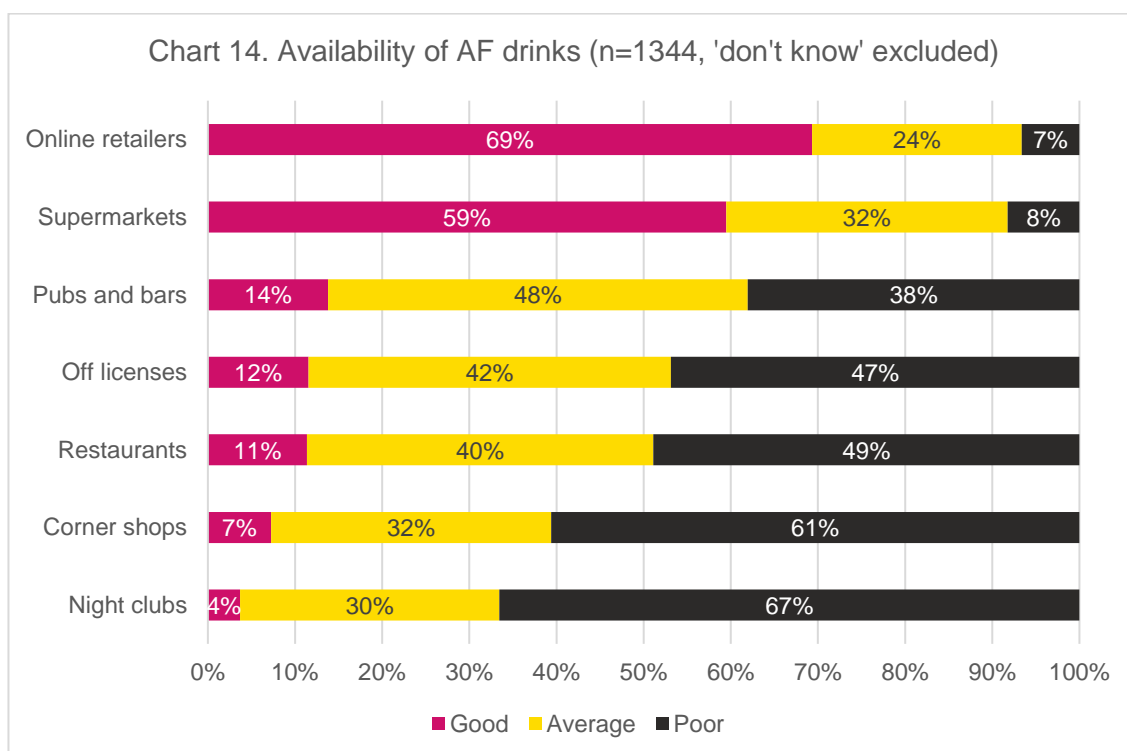
Finally, respondents were asked a few questions about the AF drinks market, namely, the availability of AF drinks, the price of them, and the issue of how much alcohol an ‘alcohol-free’ drink should actually contain.

### 5.5.1. Availability

Overall the off-trade scored much better than the on-trade in terms of its AF drinks offer.

Online retailers and supermarkets were deemed best, with around 69% of respondents describing online retailers as having ‘good’ availability of AF drinks and 59% of supermarkets. Both types of retailer had fewer than 10% of people rating them ‘poor’. By comparison, corner shops and off-licences performed badly, with 61% rating the availability at corner shops and 47% at off-licences as poor.

None of the venue types in the on-trade scored well for their availability of AF drinks. Only 14% of people rated the availability in pubs and bars as good with over a third (38%) described it as poor. Restaurants performed even worse: just 11% of people said the availability at restaurants was good and 49% described it as poor. Nightclubs scored worst of all with only 4% described the availability of AF drinks at them as good and a full two third (67%) rating them as poor.



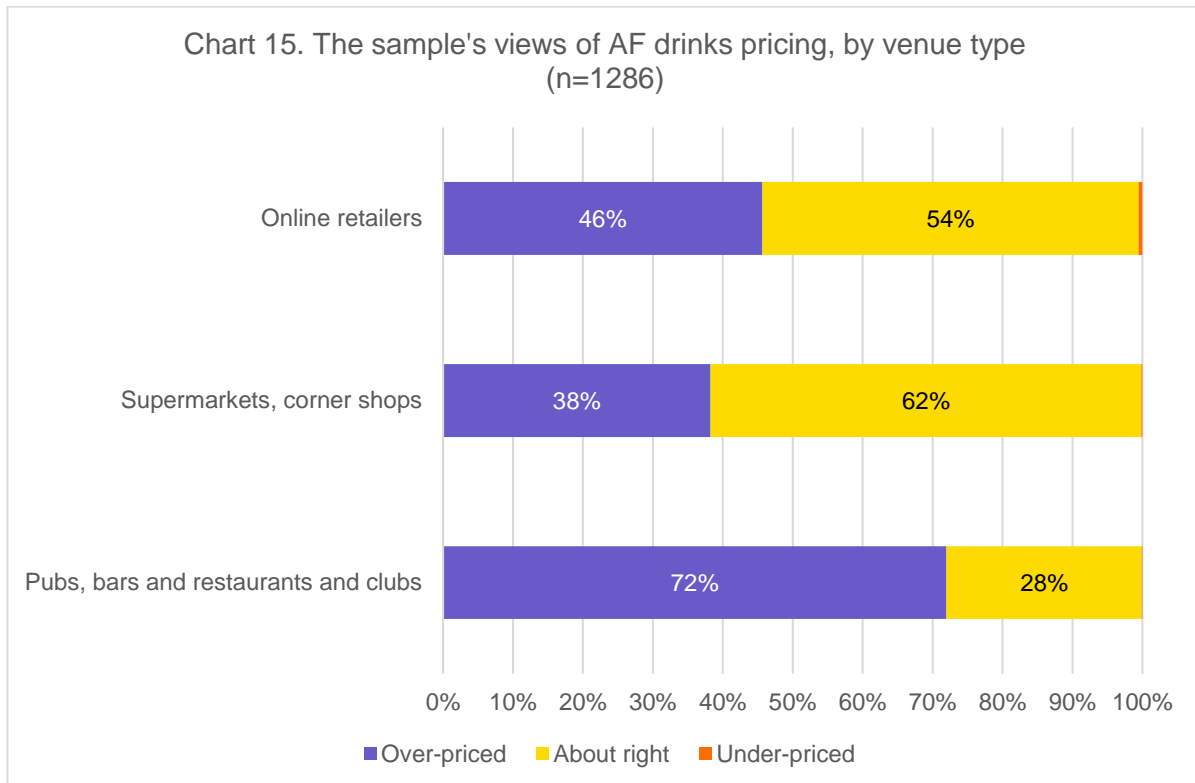
If we use the percentage of ‘don’t know’ responses as an indicator, the sample was more confident as a whole in its knowledge of some venue types over others. Unsurprisingly, confidence was highest about supermarkets, with only 3% saying ‘don’t know’, and lowest about nightclubs with 36% saying ‘don’t know’ (Table 4).

**Table 4. Percentage of ‘don’t knows’ about AF drink availability, by venue**

Venue	Don't know
Night clubs	36%
Off licenses	28%
Corner shops	19%
Online retailers	18%
Restaurants	8%
Pubs and bars	7%
Supermarkets	3%

5.5.2. The price of AF drinks

The on-trade also scored worst when it came to the price of alcohol-free drinks.

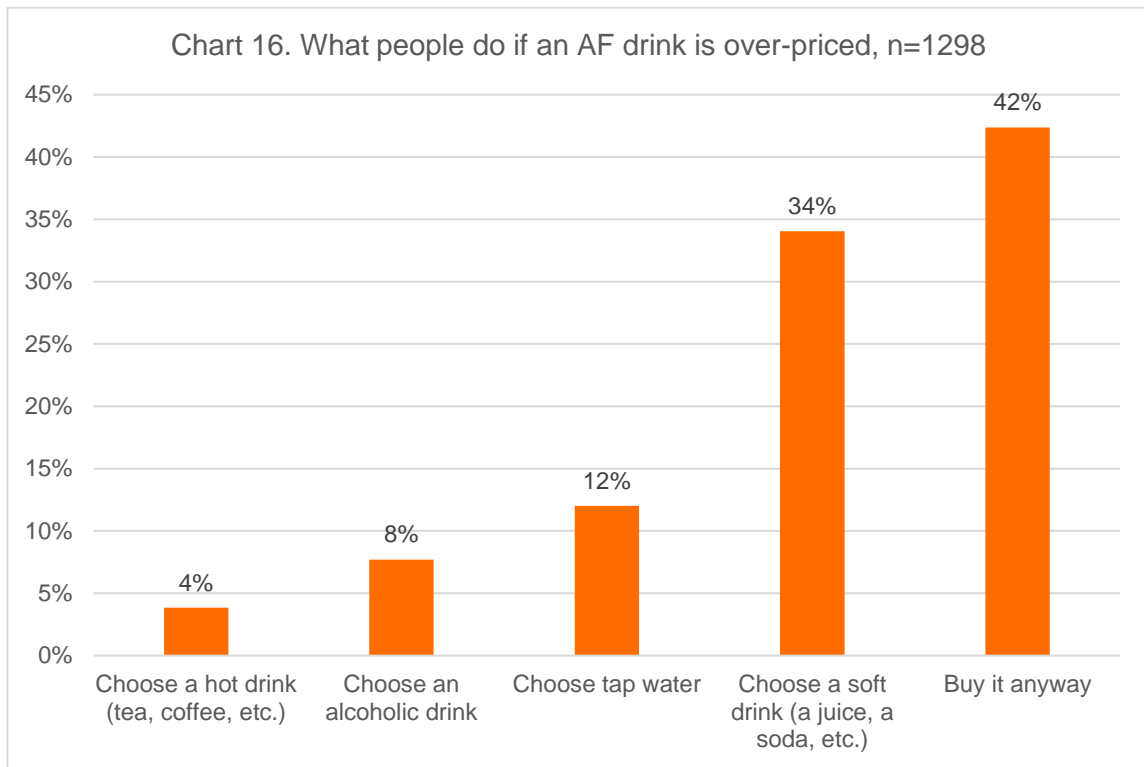


The majority of respondents said they thought AF drinks were priced “about right” in supermarkets and corners shops (62%) and online (54%). However, only around a quarter (28%) of respondents said they thought alcohol-free drinks were priced correctly in pubs, bars, restaurants and clubs. Nearly three-quarters (72%) said AF drinks were priced too high in the on-trade.

5.5.3. What do people do if they think AF drinks are over-priced?

We asked people what they do if they encounter AF drinks that they think are over-priced.

As Chart 16 shows, 42% would buy the AF drink anyway and 34% would buy a cheaper soft drink. 12% would insist on being given tap water. 8% said they would buy an alcoholic drink. There were a number of comments in which people said they would just have one drink, rather than two or three.

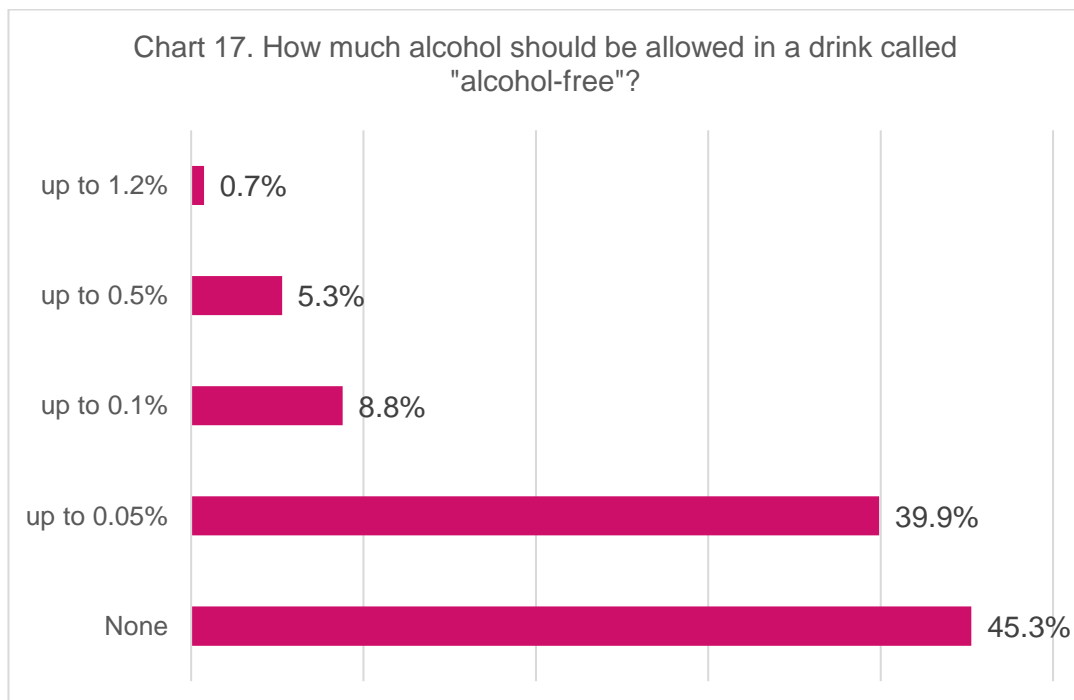


#### 5.5.4. What do people think “alcohol-free” should mean, in ABV terms?

The final piece of analysis considered what people think the label “alcohol-free” should mean.

These results surprised us somewhat, as we had assumed that the “0.5% basically counts as alcohol-free” message that has been pushed by some alcohol producers, and by Club Soda, would have had a bigger effect on our sample, whom we might imagine are more likely to be exposed to this messaging.

However, the vast majority (85.2%) expected alcohol-free to mean none/zero/0.0% (45.3%) or a minimal trace/0.05% (39.9%). This might reflect the success of major brands like Heineken, Peroni and Guinness showing that 0.0% can be achieved.



## 6. Discussion and Recommendations

### 6.1. Headlines

We believe that this is the first piece of research looking at the role of AF drinks that focuses on people who have reduced or are reducing their drinking. We were expecting the research to show that AF drinks have a fairly important role to play, because that's what our anecdotal experience to date has indicated.

However, we were taken aback by the headline finding in this report: that **83% of people who try using AF drinks to help them reduce their drinking say they are of some importance**, with 67% finding them 'essential', 'very important' or 'important' (i.e. excluding the 16% who selected 'fairly important'). The figures are even higher for heavy, daily drinkers. These numbers are higher than we expected and indicate that we were under-estimating the importance of AF drinks.

Of course, there are limitations to this research, as set out above, and we would very much welcome further research to confirm, confound or deepen understanding of these issues. Nonetheless, this research indicates that **alcohol-free drinks may have an important role to play in drink reduction journeys for the majority of hazardous and harmful drinkers.**

At Alcohol Change UK we know that these drink reduction journeys can have a widespread and long-term positive effect, reducing alcohol harm for hundreds of thousands of people. Helping people to take control of their drinking before they require a formal intervention makes both moral and financial sense.

Of course, Alcohol Change UK adopts an holistic approach to ending alcohol harm. Our behaviour change programme is only one aspect of our work, alongside our work to drive forwards new research, push for effective policy change, change social and cultural attitudes, and support an inclusive, welcoming, effective and well-funded alcohol treatment system.

We do not suggest that *only* behaviour change work matters. Nor do we argue that AF drinks are the only important aspect of such work. We know that there are many factors in successful behaviour change work. But we do believe this research serves as a warning against dismissing AF drinks as either irrelevant or only having negative effects.

### 6.2. Differences in response

The research did identify some more sizeable differences based on drinker types, with the heaviest and most frequent (e.g. daily) drinkers both more likely to try AF drinks and more likely to benefit from them.

The research did not identify significant socio-demographic differences. There were some slight indications of differences:

- a slightly lower proportion of men appearing to benefit from AF drinks
- a slightly smaller proportion of people in households with under £35k had tried AF drinks.

Further research would be helpful to either confirm or refute the findings in this research, especially with a larger sample of people reducing their drinking, if that could be found.

### 6.3. Availability and pricing

There is definitely work to do in the on-trade to increase availability of AF drinks. In many pubs, restaurants, and clubs, the only AF adult drink is a single, generic AF lager – usually Becks Blue or Heineken Zero. Given the huge range and quality of AF drinks now available, and our assumption that the hospitality industry would want to welcome all types of customer, it is strange that much of the industry seems, well, unhospitable and unwelcoming to people who are looking for a great-tasting adult

drink that doesn't contain alcohol. There are exceptions and there is progress, but there is still a long way to go.

There are also concerns about pricing, with a sense that the on-trade in particular is considerably overpricing AF drinks. An investigation into the pricing of these drinks would be of interest, comparing the upward cost pressures – especially the additional processes involved in producing alcohol-free products – with the downward cost pressures, notably the lack of any alcohol duty.

#### **6.4. Further research**

It would be good to see further research into the *relative* role of AF drinks in drink reduction journeys, alongside for example digital apps, online forums, one-to-one coaching/advice, email coaching, supportive family/friends, making the change with someone else, etc.

It would also be helpful to see more research into socio-demographics. A larger sample than this might allow us to draw conclusions about important issues such as race, disability, gender, age and sexuality; and with a particular eye on health inequalities.

It would be helpful for research to look into more detail at the question of taste-acquisition of AF drinks and whether some people will never like the taste, or have just not given them enough of a chance.

Further research would be helpful to attempt to replicate the results in Chart 8, which indicates that people who are more successful in their drink reduction journeys are more likely to try using AF drinks. In particular it would be good to assess whether this association is also causal, and in which direction, or whether there is another linked variable driving this association.

Finally, we would like to see more critical research into the hypothetical negative effects, testing whether or not they are real, whether or not they are significant, and how best to mitigate any real, significant negative effects. This will help us, as a society, to maximise the net benefits of AF drinks.

## Annex 1. Survey questions

- Which of these best describes your current drinking?
- Which of these best describes your alcohol consumption when it was at its heaviest?
- Are you trying, or have you ever tried, to reduce the amount of alcohol that you drink?
- How important are you finding alcohol-free drinks in your current effort to cut back?
- OR How important were alcohol-free drinks in your successful effort to cut back?
- OR How important are you finding alcohol-free drinks in your current effort to cut back?
- OR Did you try using alcohol-free drink alternatives in your efforts to cut back?
- OR How important do you think alcohol-free drinks would be in helping you to cut back?
- What is the reason for this level of importance?
- How frequently do you currently consume alcohol-free drinks?
- You said that you have never tried an AF drink. What are the reasons for that?
- In general, what is your personal experience of the availability of the alcohol-free drinks that you like in these different places?
- What is your general view of the price of alcohol-free drinks, from these different sources, given your experience?
- If you do find that an alcohol-free drink is over-priced, what is your usual response?
- How much alcohol should be allowed in a drink called "alcohol-free"?
- I belong to the following age group...
- I would describe my gender as...
- Do you identify as trans?
- I have a disability, long-term health condition or impairment as defined by the Equalities Act 2010
- I would describe my sexuality as...
- I would describe my ethnic group, racial identity or background as...
- My average annual household income is...

## Annex 2. Data Tables

Table 1. How frequently respondents were consuming alcohol-free drinks

Frequency	N	%
Daily	86	5.9
Most days	240	16.4
Once or twice a week	415	28.3
Once or twice a month	221	15.1
Less than once a month	188	12.8
No longer consume	182	12.4
Never tried one	133	9.1
Total	1465	100.0
Missing	12	
	1477	

Table 2. How important are alcohol-free drinks to people who are currently trying to reduce their alcohol consumption?

Responses	Currently trying to reduce consumption, N (%)
Essential	125 (18.0)
Essential, very important, important	388 (56.1)
Essential, very important, important, fairly important	482 (69.7)
Not important, not using	210 (30.3)
Responses	692

Table 3. How important are alcohol-free drinks to people who have successfully reduced their alcohol consumption and now feel in control?

Responses	Previously tried to reduce their consumption, successful and now in control, N (%)
Essential	131 (25.5)
Essential, very important, important	301 (58.6)
Essential, very important, important, fairly important	373 (72.6)
Not important, not using	141 (27.4)
Responses	514

Table 4. Crosstabs of drinking habits during heaviest drinking period by how important they found AF drinks during their successful attempt to reduce their consumption

		Very important/ Essential	Important/ Fairly important	Not important/ did not use	Total
<b>Daily heavy drinker</b>	Count	127	46	56	229
	%	55.5%	20.1%	24.5%	100.0%
<b>Daily light drinker</b>	Count	48	35	24	107
	%	44.9%	32.7%	22.4%	100.0%
<b>Weekly moderator</b>	Count	15	16	11	42
	%	35.7%	38.1%	26.2%	100.0%
	Count	44	18	40	102



<b>Frequent binge drinker</b>	%	43.1%	17.6%	39.2%	100.0%
<b>Occasional binge drinker</b>	Count	10	5	8	23
	%	43.5%	21.7%	34.8%	100.0%
<b>Occasional light/non-drinker</b>	Count	5	4	2	11
	%	45.5%	36.4%	18.2%	100.0%
<b>Total</b>	Count	249	124	141	514
	%	48.4%	24.1%	27.4%	100.0%

**Table 5. Crosstabs of how important respondents found AF drinks during their successful attempt to reduce their consumption by gender**

		<b>Very important/ Essential</b>	<b>Important/ Fairly important</b>	<b>Not important/ did not use</b>	<b>Total</b>
<b>Male</b>	Count	45	32	48	125
	%	36.0%	25.6%	38.4%	100.0%
<b>Female</b>	Count	202	90	91	383
	%	52.7%	23.5%	23.8%	100.0%
<b>Non-binary</b>	Count	1	1	1	3
	%	33.3%	33.3%	33.3%	100.0%
<b>Prefer to self-describe</b>	Count	0	1	0	1
	%	0.0%	100.0%	0.0%	100.0%
<b>Total</b>	Count	248	124	140	512
	%	48.4%	24.2%	27.3%	100.0%

**Table 6. What are people's experiences of the availability of the alcohol-free drinks that they like?**

	<b>Online retailers N (%)</b>	<b>Pubs and bars N (%)</b>	<b>Restaurants N (%)</b>	<b>Night clubs N (%)</b>	<b>Supermarkets N (%)</b>	<b>Corner shops N (%)</b>	<b>Off licenses N (%)</b>
<b>Good</b>	763 (56.8)	171 (12.7)	139 (10.4)	31 (2.3)	778 (57.9)	78 (5.8)	111 (8.3)
<b>Average</b>	265 (19.7)	600 (44.7)	489 (36.4)	257 (19.1)	423 (31.5)	349 (26.0)	404 (30.1)
<b>Poor</b>	73 (5.4)	474 (35.3)	602 (44.8)	575 (42.8)	108 (8.0)	659 (49.1)	455 (33.9)
<b>Don't know</b>	242 (18.0)	98 (7.3)	113 (8.4)	480 (35.8)	34 (2.5)	257 (19.1)	373 (27.8)
<b>Totals</b>	1343	1343	1343	1343	1343	1343	1343

**Table 7. What do people think about the price of alcohol-free drinks?**

	<b>Pubs, bars and restaurants and clubs, N (%)</b>	<b>Supermarkets, corner shops</b>	<b>Online retailers</b>
<b>Over-priced</b>	885 (65.9)	491 (36.6)	504 (37.5)
<b>About right</b>	344 (25.6)	792 (59.0)	595 (44.3)
<b>Under-priced</b>	1 (0.1)	2 (0.2)	6 (0.5)
<b>Don't know</b>	113 (8.4)	58 (4.3)	238 (17.8)

<b>Totals</b>	1343	1343	1343
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**Table 8. What do people do when they find an over-priced alcohol-free drink?**

<b>Responses</b>	<b>N (%)</b>
Buy it anyway	550 (42.4)
Choose a soft drink (a juice, a soda, etc.)	441 (34.0)
Choose tap water	156 (12.0)
Choose a hot drink (tea, coffee, etc.)	50 (3.9)
Choose an alcoholic drink	100 (7.7)
Responses	1297

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