

No- and low-alcohol drinks in Great Britain

Monitoring report



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Glossary of key terms and abbreviations

ABV	Alcohol by volume
All alcoholic drinks	Alcoholic drinks (e.g. beers, ciders, wines, spirits) irrespective of their alcohol content, including no/lo drinks
ATS	Alcohol Toolkit Study
EPOS	Electronic point of sale
No/lo drinks	Alcoholic drinks (e.g. beers, ciders, wines, spirits) containing less than 1.2% alcohol by volume
Off-trade	Outlets selling alcoholic drinks for consumption off the premises (e.g. shops and supermarkets)
On-trade	Outlets selling alcoholic drinks for consumption on the premises (e.g. pubs, restaurants and nightclubs)
Standard alcoholic drinks	Alcoholic drinks (e.g. beers, ciders, wines, spirits) containing at least 1.2% alcohol by volume
RTDs	Ready-to-drinks, a collective term for alcopops and pre-mixed spirits
SKU	Stock keeping unit

Executive summary

Retailers sold 1.1 litres of no- and low-alcohol (no/lo) drinks per adult in Great Britain in 2021 and 57,301,400 litres in total, while the total value of no/lo drink sales was £221m. The proportion of alcoholic drink sales accounted for by no/lo drinks is rising and was 1.06% of total sales volume and 0.60% of sales value in 2021. This proportion was higher in the off-trade (i.e. shops and supermarkets) than the on-trade (i.e. pubs, restaurants and nightclubs). No/lo beer dominates the no/lo drinks market, accounting for 77% of total no/lo sales volume.

The average price of no/lo drinks is falling in real-terms for all beverage types. The average price paid per litre of no/lo beer in the on-trade fell from £9.63 in 2014 to £8.54 in 2022 after adjusting for inflation. No/lo beer is more expensive than standard beer in the off-trade and on-trade but the price difference is falling. The average price paid for no/lo wines, spirits and ready-to-drinks (RTDs, a collective name for alcopops or pre-mixed spirits) in the off-trade in 2022 was lower than for standard wines, spirits and RTDs.

A small number of major brands dominate the no/lo market. The three best-selling no/lo beer brands in the off-trade accounted for 48% of all no/lo beer sales by volume in 2021 and the ten best-selling brands accounted for 76%. Similarly, in the off-trade, the top five no/lo cider brands accounted for 85% of no/lo cider sales and the two best-selling spirits brands account for 69% of no/lo spirits sales. No/lo sales also now largely come from products that have a standard alcoholic drink parent brand, such as Heineken for Heineken 0.0.

The proportion of on-trade outlets that sold packaged no/lo beer (i.e. beer in bottles or cans) increased from 45% in 2014 to 73% in 2022. The proportion selling draught no/lo

beer was much lower but increased from 0.1% in 2014 to 3.8% in 2022. Other beverage types were less widely available with 24% of on-trade outlets selling no/lo cider, 17% selling no/lo spirits and less than 5% selling no/lo wine and RTDs.

In survey data collected in 2022, 33% of adults reported consuming no/lo drinks at least once in the last year while 18% reported doing so at least once a month and 10% at least once a week. Consuming no/lo drinks was more common among those of higher social grades and those who also drank standard alcoholic drinks. Frequent consumption of no/lo drinks was more common among those consuming alcohol at risky levels.

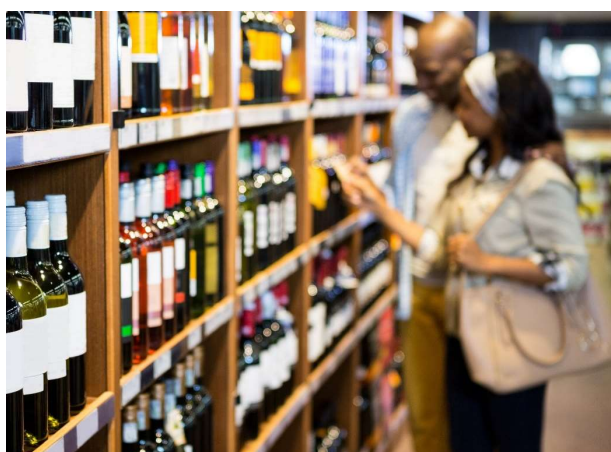


Introduction

No- and low-alcohol drinks (no/lo drinks) are beers, ciders, wines, spirits and RTDs (ready-to-drinks or pre-mixed spirits) containing less than 1.2% alcohol by volume (ABV). These products are increasingly popular in the UK and the Government is committed to encouraging this trend as a central part of its public health policies.

This could lead to large reductions in the harm caused by alcohol if people drink no/lo drinks instead of standard alcoholic drinks. However, that may not happen for several reasons. For example:

- People may simply add no/lo drinks to their existing alcohol consumption.
- The improvements in public health might only be small if the people consuming no/lo drinks are lighter drinkers rather than heavier drinkers.
- Health inequalities may widen if only people from less deprived households can afford no/lo drinks.
- Finally, promoting no/lo drinks that resemble standard alcoholic drinks might encourage people to consume both products, leading to more alcohol consumption not less.



There is little publicly available information on trends in no/lo drinks sales, how much they cost, who is buying them or how often people drink them.

Therefore, this report uses data collected by market research companies and our research team to describe the size and characteristics of the no/lo drinks market as well as the consumption and purchasing patterns of adults and households.

It is the first report of its kind internationally and we intend to publish further annual reports between 2024 and 2026. These will update our findings using the most recent data.

Our work is part of a larger project funded by the National Institute for Health Research to explore the public health impact of no/lo drinks [1].

The results will help the Government, health organisations and the public understand the role of no/lo drinks in improving public health.

Methods

The data come from three sources that all provide information for Great Britain (i.e. the UK excluding Northern Ireland):

CGA by NIQ data on alcoholic drink sales in the on-trade (e.g. pubs, bars and restaurants) collected between 2014 and 2022.



IRI data on alcoholic drink sales in the off-trade (e.g. shops and supermarkets) collected between 2020 and 2022.



Alcohol Toolkit Survey data on individual consumption among adults collected in August and October 2022.



Appendix A provides more information on each of these data sources.

A note on timing of data

The COVID-19 pandemic led to restrictions on the activities of on-trade retailers in 2020 and 2021. These restrictions also affected off-trade sales, purchasing and consumption to a lesser degree. This means that readers should interpret time-trend data cautiously, particularly where no data are available from before 2020.

The 2022 data from IRI and CGA by NIQ are also incomplete at the time of writing, with data only available to 30th October 2022 in the off-trade and 13th August 2022 in the on-trade. We highlight this where relevant and often focus on 2021 data as a result.

Terminology

Throughout this report, we refer to no- and low-alcohol drinks as **no/lo drinks** and drinks containing more than 1.2% ABV as **standard alcoholic drinks**.

We refer to no/lo and standard drinks combined as **all alcoholic drinks** for brevity but we recognise that many of the no/lo drinks sold in Great Britain contain negligible amounts of alcohol.

We use the same language when referring to individual beverage types. For example, we refer to no/lo beer, standard beer and all beer.

No- and low-alcohol drink sales

Data on no/lo alcohol drink sales start from 2020 in the off-trade and 2014 in the on-trade and, in both cases, cover only a part of 2022. This means the most recent complete annual data are affected by COVID-19 restrictions that restricted on-trade activity. Readers should bear this in mind when interpreting the information below.

Sales volumes in 2021

Retailers sold 1.1 litres of no/lo drinks per adult in Great Britain in 2021 and 57,301,400 litres in total (Figure 1). This was split between 0.971 litres per adult in the off-trade and 0.108 litres per adult in the on-trade.

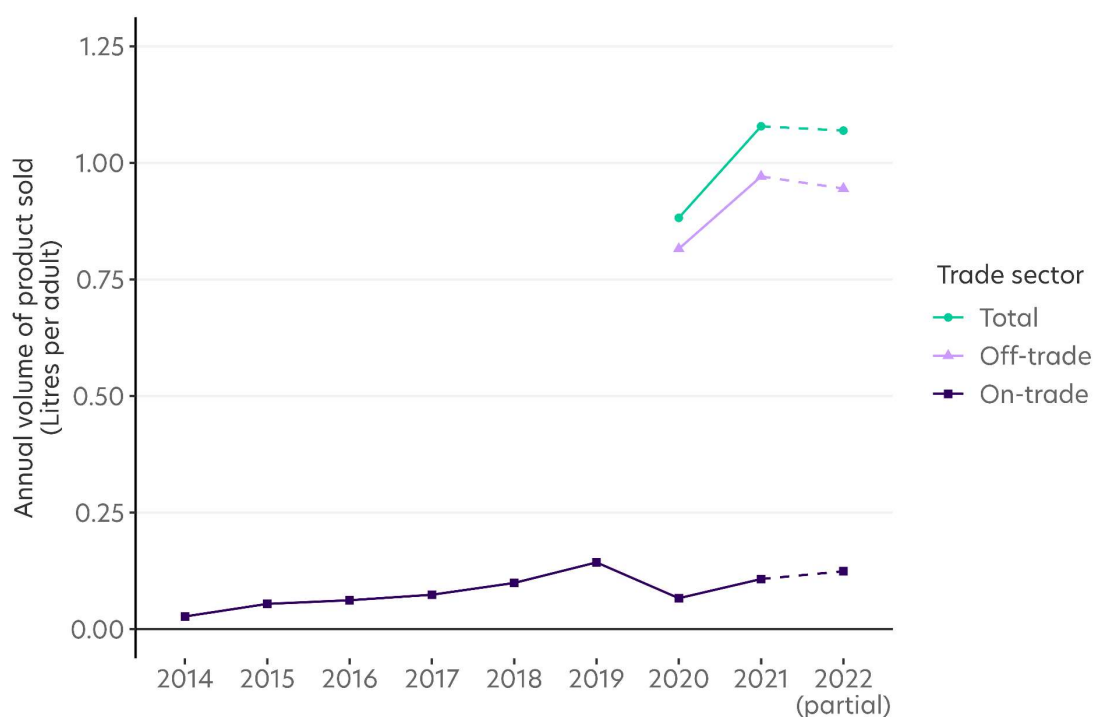
No/lo beer dominated both total, off-trade and on-trade no/lo sales (Figure 2). It accounted for 77% of total sales volume,

74% of off-trade sales volume and 85% of on-trade sales volume in 2021. In contrast, cider accounted for 12% of total no/lo sales volume, wine for 11%, spirits for 1% and other products including RTDs for 1%. Beer and spirits combined accounted for 98% of on-trade sales volume in 2021.

No/lo drinks accounted for 1.06% of all alcoholic drink sales in 2021 by volume (Figure 3).

Figure 1

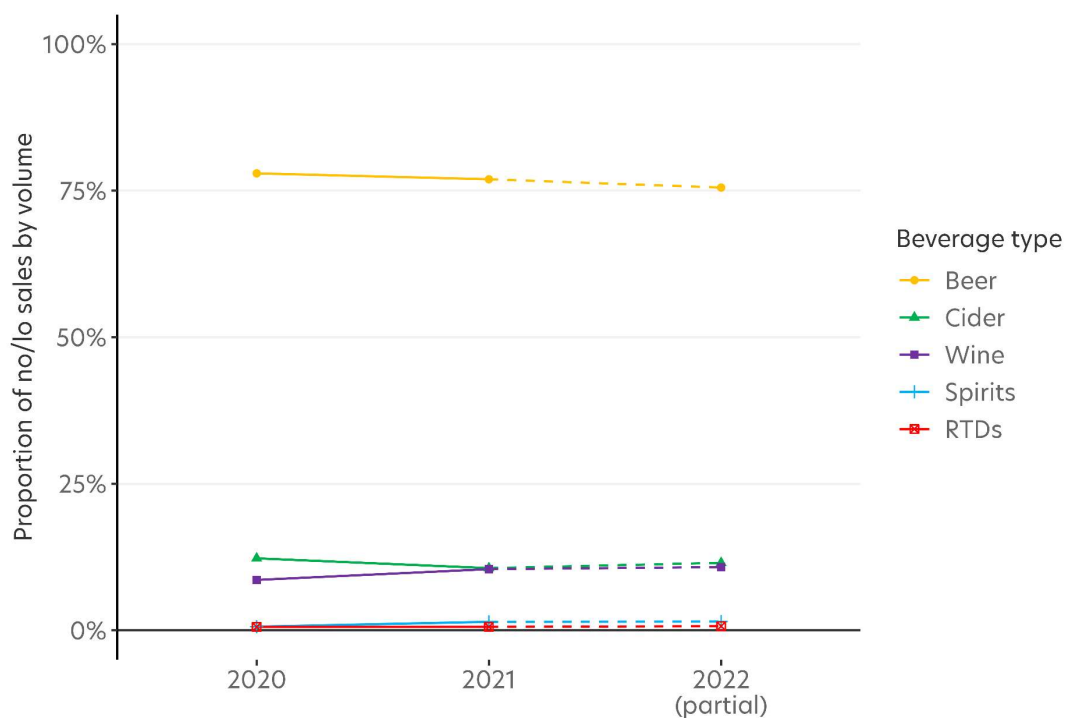
Annual volume of no/lo product sold in litres per adult by trade sector.



Data: CGA by NIQ - OPMS™ (On-trade) and IRI (Off-trade)
Population estimates from ONS

Figure 2

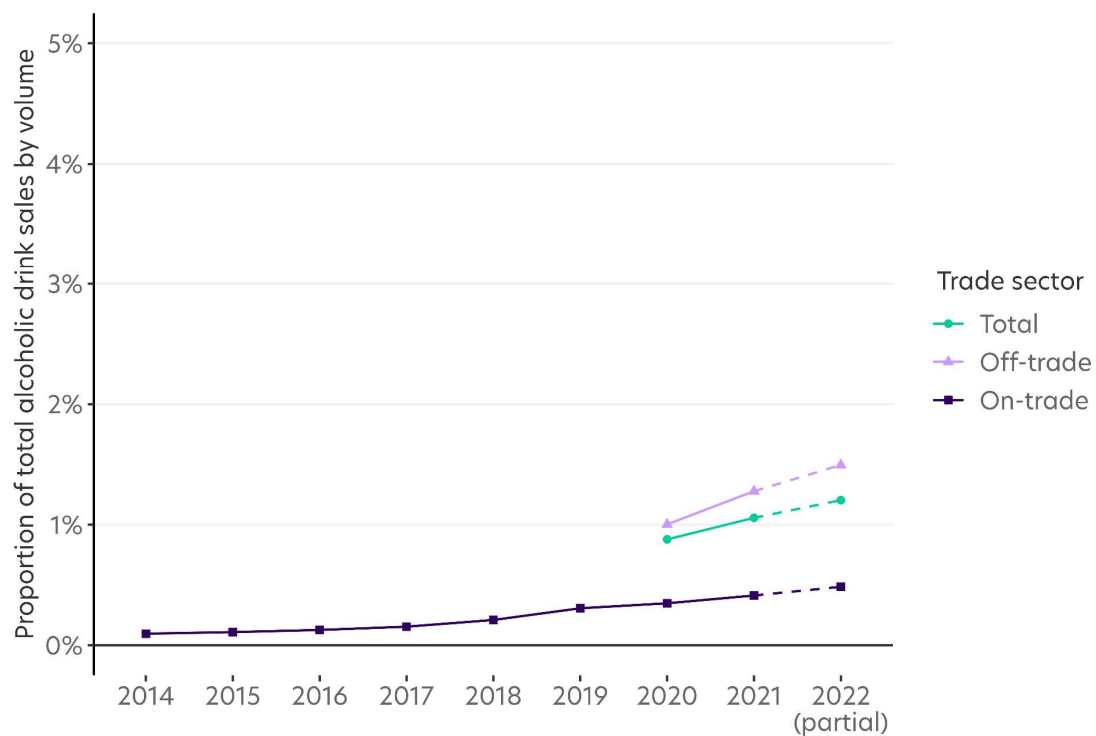
Proportion of the volume of no/lo product sold accounted for by beverage types (on- and off-trade combined).



Data: CGA by NIQ - OPMST™ (On-trade) and IRI (Off-trade)

Figure 3

Proportion of total alcoholic drink sales volume accounted for by no/lo products by trade sector.



Data: CGA by NIQ - OPMST™ (On-trade) and IRI (Off-trade)

This figure was higher in the off-trade, where no/lo drinks accounted for 1.28% of all alcoholic drink sales, than the on-trade, where no/lo drinks accounted for 0.41% of sales.

No/lo beer accounted for 1.50% of all beer sales, 1.71% of all off-trade beer sales, and 0.46% of all on-trade beer sales in 2021 by

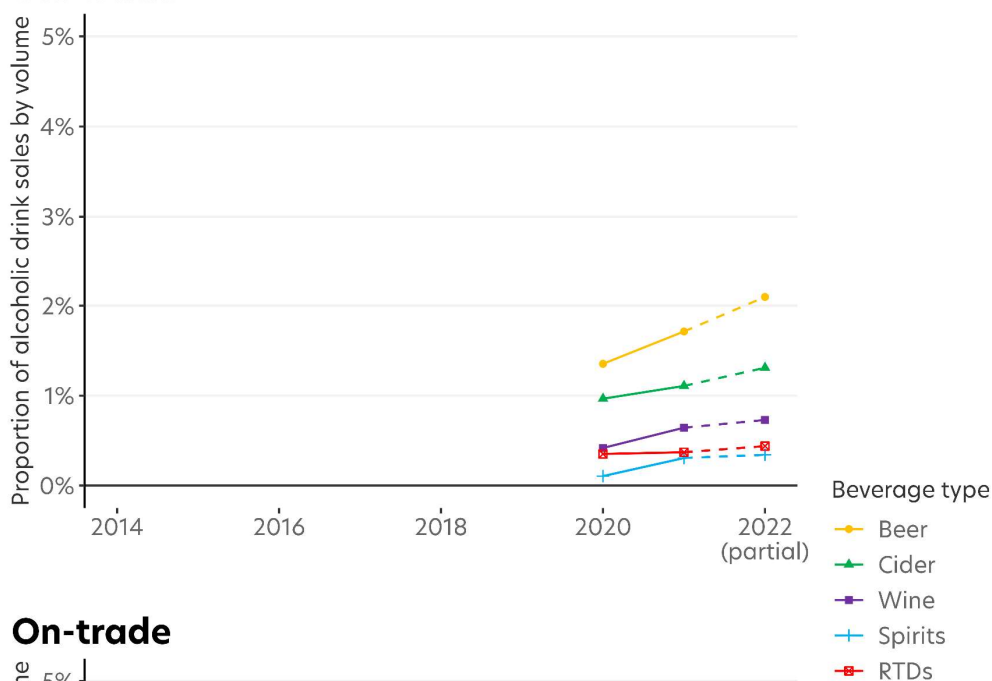
volume (Figure 4). These figures are substantially higher than for any other beverage type.

For example, no/lo products accounted for 1.11% of all off-trade cider sales, 0.64% of all off-trade wine sales, 0.31% of all off-trade spirits sales and 0.37% of all off-trade RTD sales in 2021.

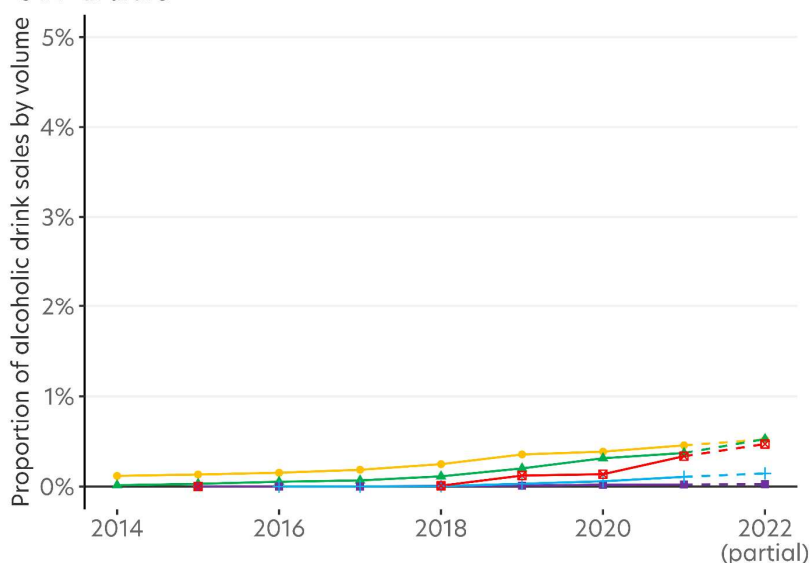
Figure 4

Proportion of alcoholic drink sales volume accounted for by no/lo products by beverage type.

Off-trade



On-trade



Data: CGA by NIQ - OPMS™ (On-trade) and IRI (Off-trade)

Trends in sales volume and value

No/lo drink sales increased in absolute terms and as a proportion of total alcoholic drink sales in the off-trade between 2020 and 2021. Incomplete figures suggest this growth continued in 2022 despite the end of pandemic-related restrictions on the on-trade in 2021.

In the on-trade, no/lo drinks sales increased each year between 2014 and 2019 but then decreased in 2020 as COVID-19 restricted activity. However, sales increased from 2020 levels in both the 2021 and partial 2022 data.

The impact of COVID-19 on sales in both trade sectors means the clearest evidence on trends in no/lo sales comes from the proportion of all alcoholic drink sales volume accounted for by no/lo products.

In the off-trade, this increased from 1.00% in 2020 to 1.50% in the incomplete 2022 data (Figure 4). In the on-trade, it increased from 0.10% in 2014 to 0.31% in 2019 before COVID-19, and then to 0.48% in the incomplete 2022 data (Figure 9).

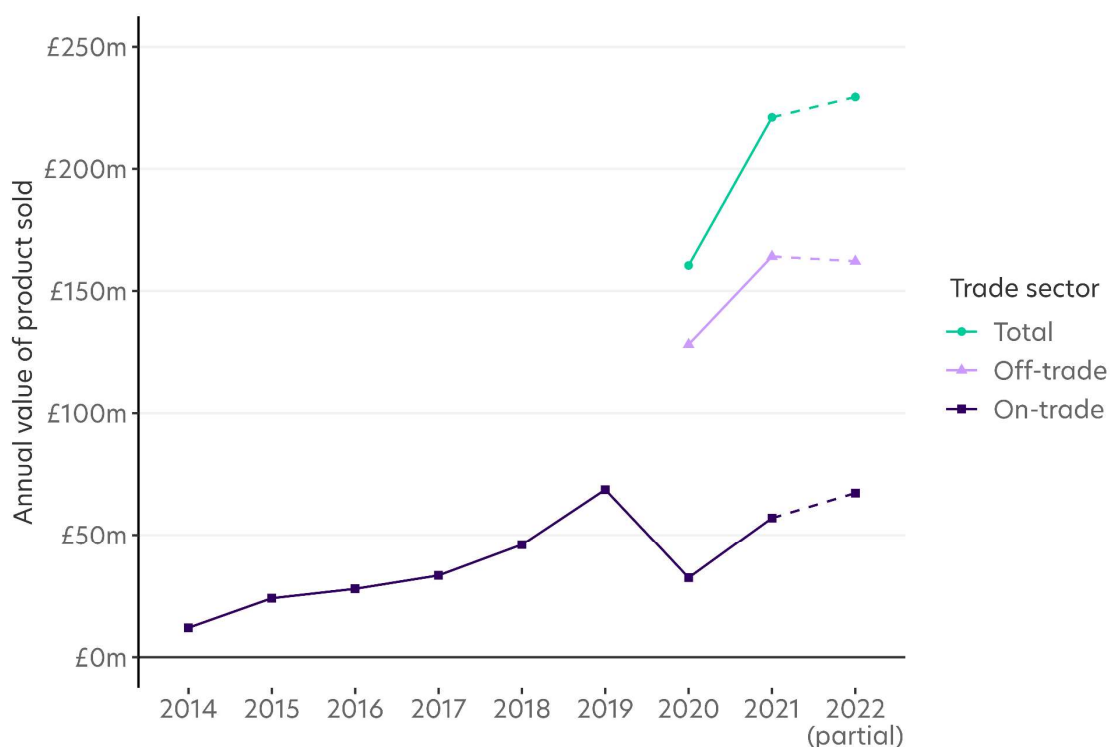
This reflects increases in all beverage types and there are similar trends for sales value.

Sales value in 2021

The total value of no/lo drink sales in Great Britain in 2021 was £221m, 0.6% of all alcoholic drink sales by value, with £164m (0.8%) of sales in the off-trade and £57m (0.4%) of sales in the on-trade (Figures 5 and 6). As with sales volume, no/lo product sales made up a larger proportion of all beer sales than other beverage types.

Figure 5

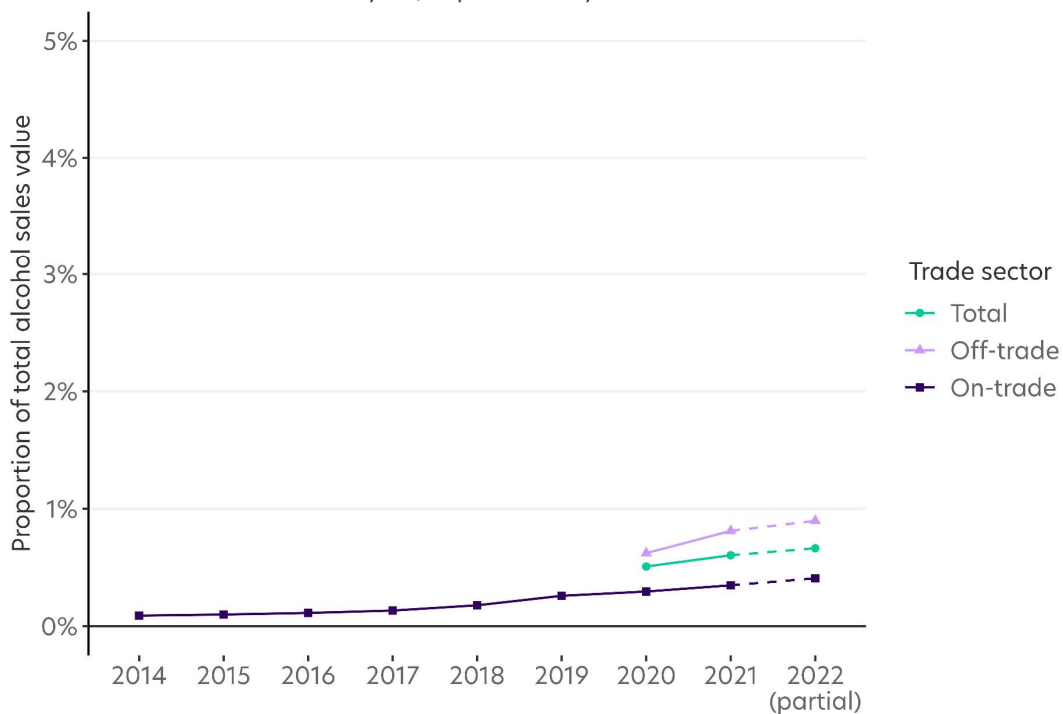
Annual value of no/lo product sold (£m) by trade sector.



Data: CGA by NIQ - OPMS™ (On-trade) and IRI (Off-trade)

Figure 6

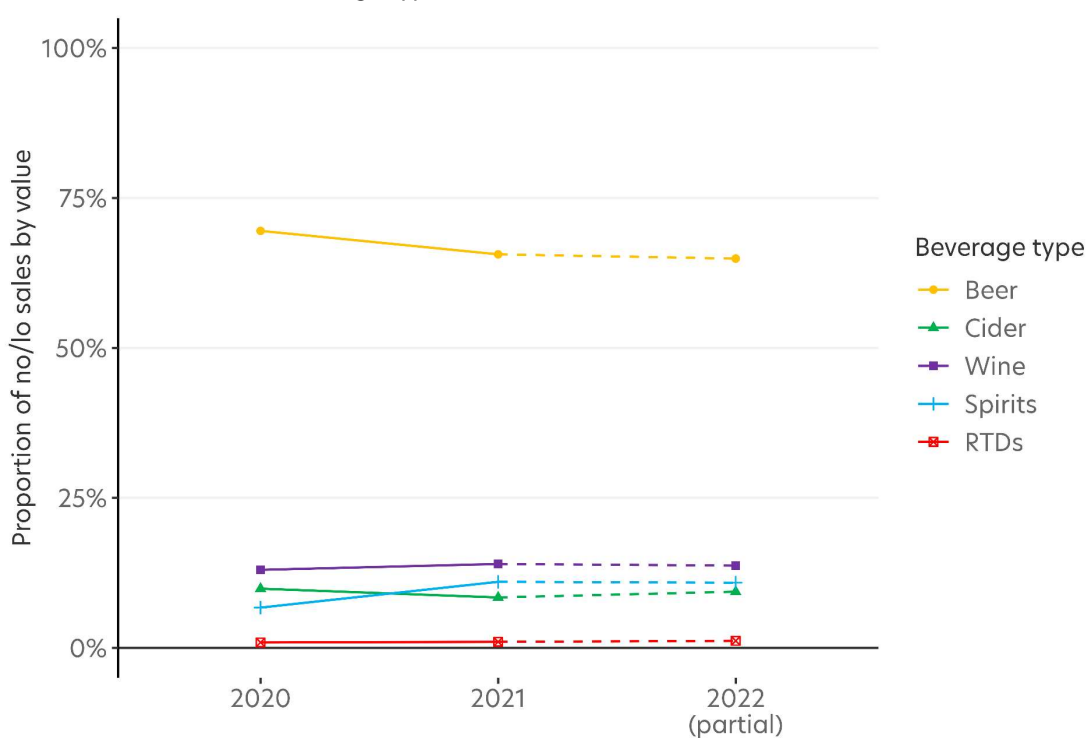
Proportion of total alcoholic drink sales value accounted for by no/lo products by trade sector.



Data: CGA by NIQ - OPMS™ (On-trade) and IRI (Off-trade)

Figure 7

Proportion of no/lo drink sales value accounted for by beverage types (on- and off-trade combined).



Data: CGA by NIQ - OPMS™ (On-trade) and IRI (Off-trade)

As with sales volume, beer dominated sales value among no/lo products (Figure 7). It accounted for 66% of total no/lo sales value, 61% of off-trade sales value and 80% of on-trade sales value in 2021.

In contrast, cider accounted for 8% of no/lo sales value, wine for 14% and spirits for 11% and other products including RTDs for 1%. Beer and cider combined accounted for 80% of on-trade no/lo sales value.

The dominance of no/lo beer is less for sales value than sales volume because beer is sold in larger volumes per serving than other drinks (e.g. 568ml pint rather than a 25ml shot of spirits). Sales value therefore represents a better measure of how no/lo sales are distributed across beverage types, although the higher price per serving for spirits relative to beers and ciders means it remains an imperfect measure.



No- and low-alcohol drink prices

Data on no/lo alcohol drink prices come from the same sources as the sales data and therefore start from 2020 in the off-trade and 2014 in the on-trade. In both cases the data cover only a part of 2022. The COVID-19 pandemic did not affect prices in the same way as sales, but retailers in both trade sectors may still have adopted different pricing strategies in response to the pandemic. All pricing data are converted to 2021 prices to facilitate real-terms comparison over time, with other years adjusted for inflation using the CPIH index.

The average price of no/lo drinks decreased in real-terms in the off-trade between 2020 and the incomplete 2022 data (Figure 8).

The average price per litre fell from £2.59 to £2.46 for no/lo beer, from £5.29 to £4.77 for no/lo wine and from £33.15 to £19.88 for no/lo spirits.

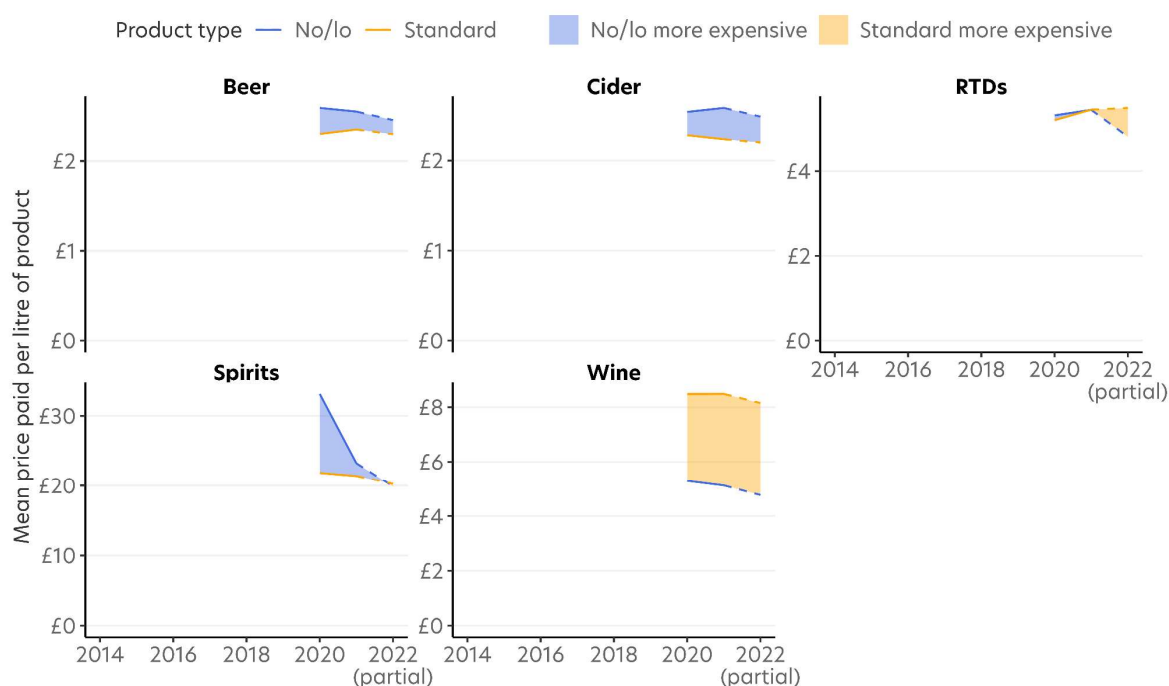
There were similar trends in the on-trade where the average price per litre of no/lo beer decreased in real-terms between 2014 and 2022 from £9.63 to £8.54 (Figure 9).

Price trends for other no/lo beverages in the on-trade were less stable, as the small number of products available for sale means

Figure 8

Mean price paid per litre of product in the off-trade for standard and no/lo drinks by beverage type.

Off-trade

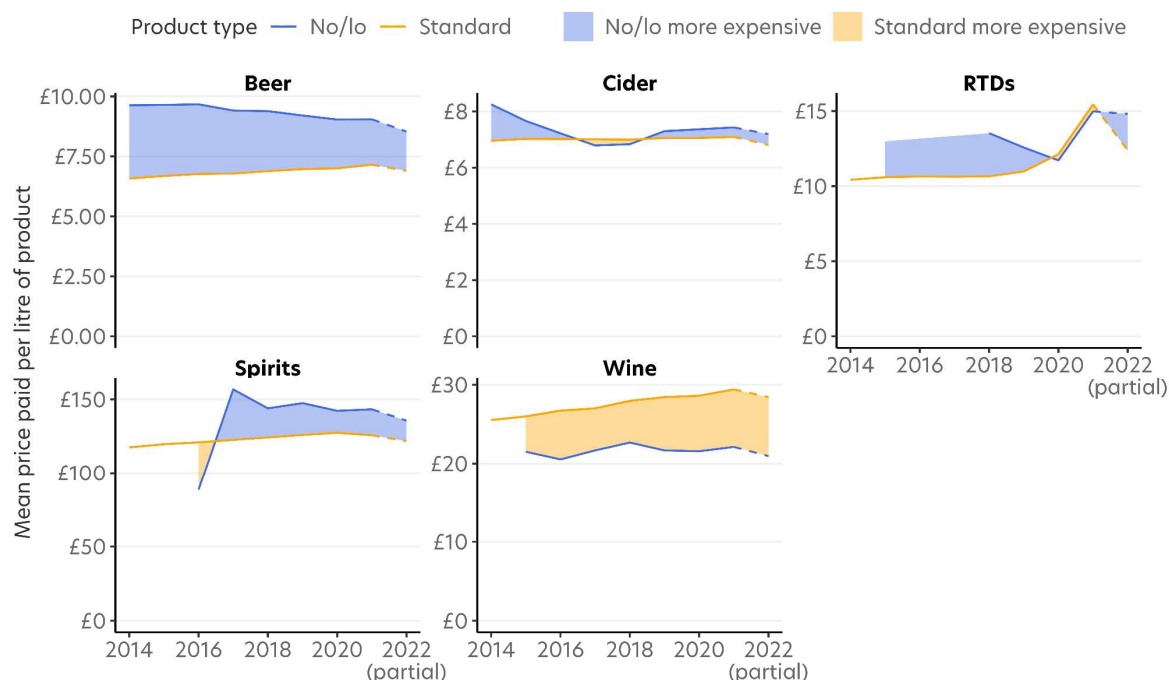


Data: IRI

Figure 9

Mean price paid per litre of product in the on-trade for alcoholic drinks and no/lo drinks by beverage type.

On-trade



Data: CGA by NIQ - OPMS™

new products had a large effect on the average price. However, the average price per litre of no/lo spirits decreased in real-terms from £156.73 in 2014 to £135.65 in 2022.

The decreasing cost of no/lo drinks means some no/lo beverage types are now cheaper on average than their standard alcoholic drink equivalents. However, others are similarly priced and some remain more expensive.

In the off-trade, the average price of no/lo beer was 13% higher than standard beer in 2020 but this decreased to 7% higher in the incomplete 2022 data. The average price of no/lo spirits was 52% higher than standard spirits in 2020 but is now 2% lower. The price of no/lo wine remains around 40%

lower than standard wine and no/lo RTDs cost 12% less than standard RTDs in 2022.

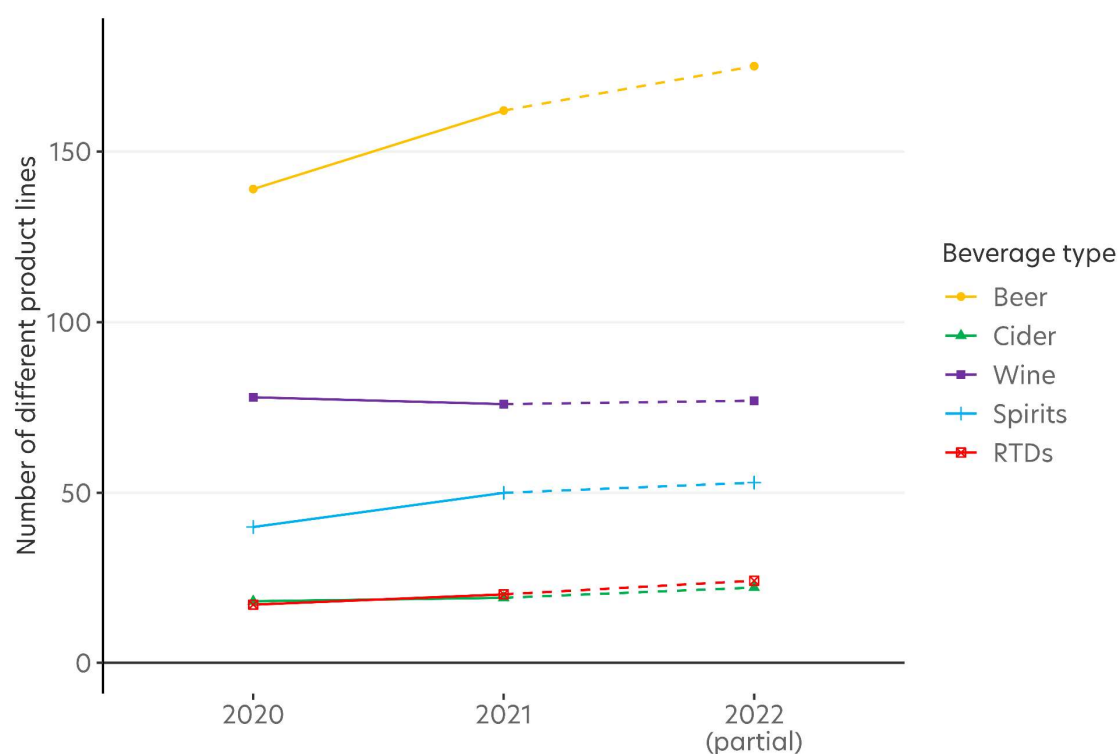
In the on-trade, the small number of products available in some beverage categories mean that price differences when compared to standard alcoholic drinks vary substantially from year to year. However, no/lo products remain more expensive in the beverage categories with larger numbers of products.

The average price of no/lo beer was 46% higher than standard beer in 2014 and this decreased to 24% higher in the incomplete 2022 data. The average price of no/lo spirits was 28% higher than standard spirits in 2017 and this decreased to 11% higher in 2022.

No- and low-alcohol products and availability

Figure 10

Number of different no/lo product lines sold in the off-trade by beverage type.



Data: IRI

Number of products

The number of different no/lo products sold increased over time in both the off-trade and on-trade data.

There were 351 different no/lo products sold in the off-trade in the incomplete 2022 data, up from 292 in 2020. The products sold in 2022 included 175 beers, 22 ciders, 77 wines, 53 spirits and 24 RTDs (Figure 10). Most of the increase between 2020 and 2022 came from beers and spirits.

There were 189 different no/lo products sold in the on-trade in the incomplete 2022 data, up from 23 in 2014. This includes an increase from 20 beers in 2014 to 98 beers in 2022

and an increase from 10 spirits in 2019 to 44 spirits in 2022. It also includes 17 ciders, 22 wines and 8 RTDs in 2022 (Figure 11).

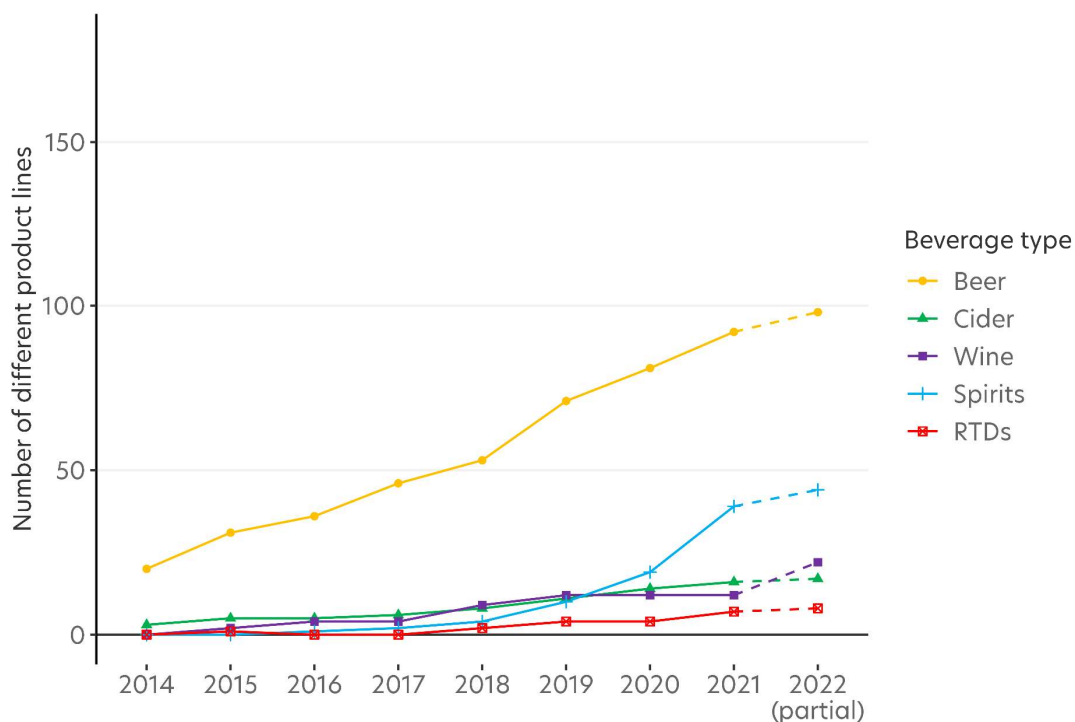
Best-selling products

A small number of major brands dominate most sectors of the no/lo market although there are some signs this is changing over time in the more developed sectors of the market.

In the off-trade, the four best-selling beer brands by volume account for 52% of all no/lo beer sales in 2022. The ten best-selling brands account for 76% of sales, although this is down from 85% in 2020.

Figure 11

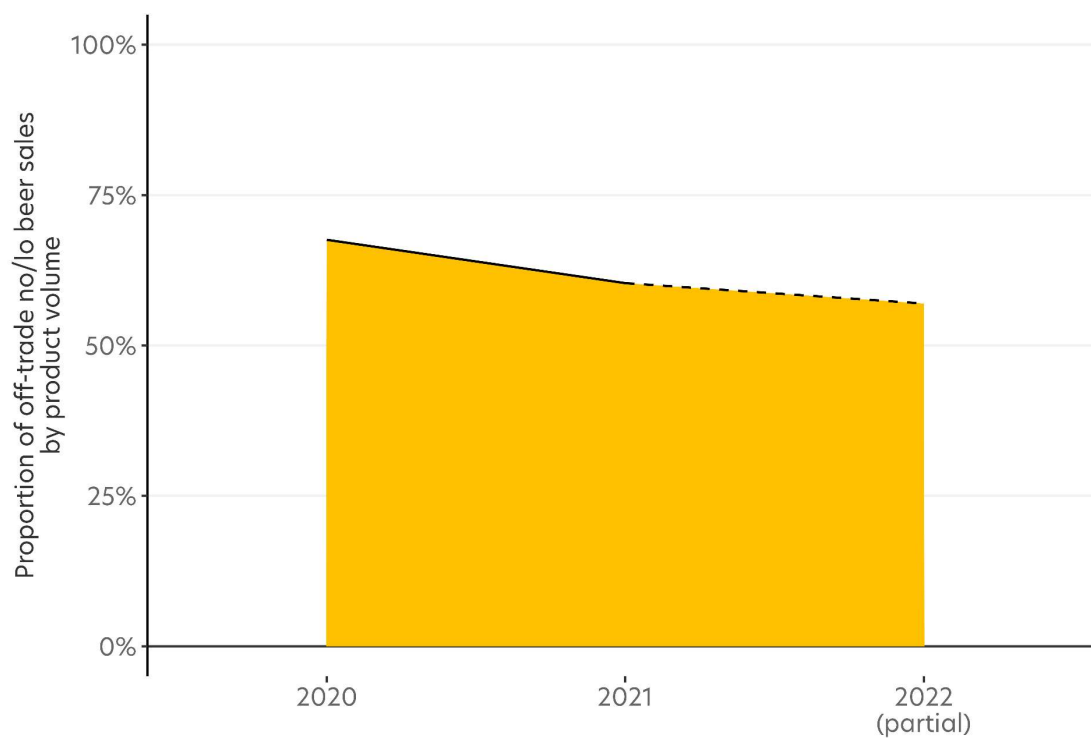
Number of different product lines sold in the on-trade by beverage type.



Data: CGA by NIQ - OPMS™

Figure 12

Proportion of off-trade no/lo beer sales volume accounted for by the best-selling products (only products with >5% market share shown).



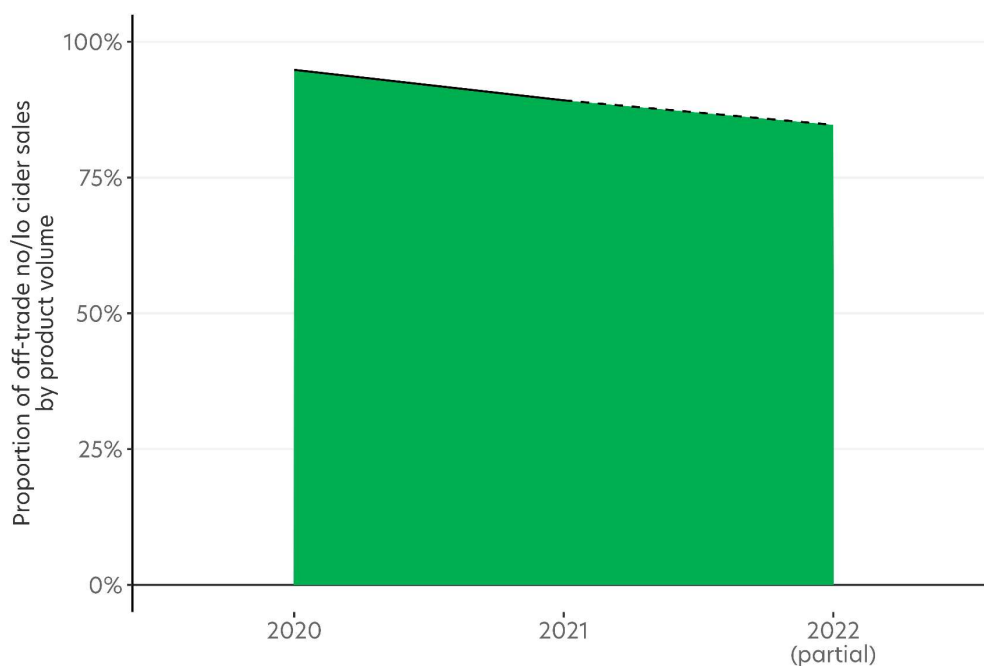
Data: IRI

The top five no/lo cider brands account for 85% of all no/lo cider sales and the ten best-selling brands account for 99% of sales (Figure 13).

The three best-selling spirits account for 75% of no/lo spirits sales (Figure 14).

Figure 13

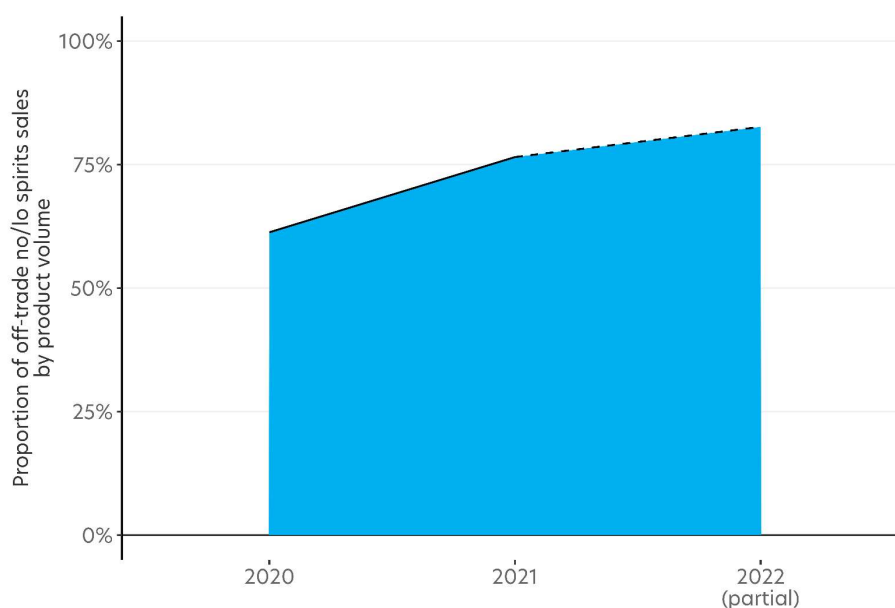
Proportion of off-trade no/lo cider sales volume accounted for by the best-selling products (only products with >5% market share shown).



Data: IRI

Figure 14

Proportion of off-trade no/lo spirits sales volume accounted for by the best-selling products (only products with >5% market share shown).



Data: IRI

In the on-trade, three products account for 61% of no/lo beer sales by volume and the ten best-selling no/lo beer products account for 80% of sales, down from 96% in 2014 (Figure 15).

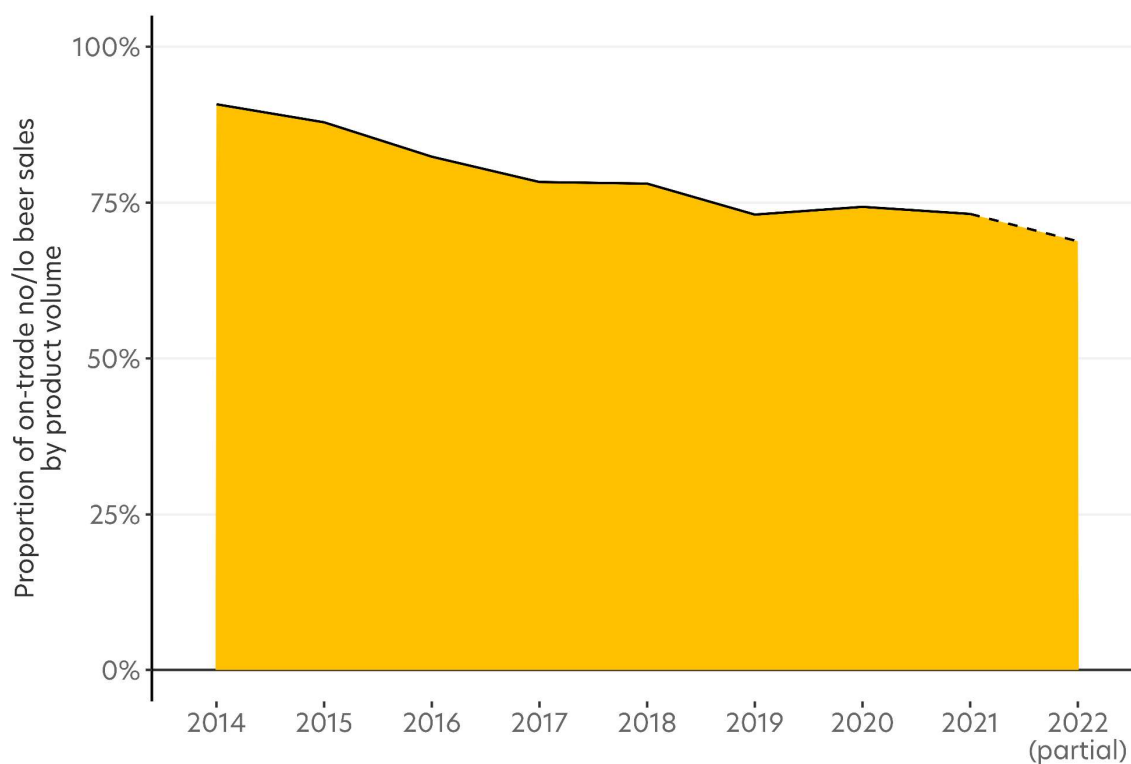
The five best-selling ciders account for 94% of on-trade sales (Figure 16).

The on-trade no/lo spirits market is more diverse with the three best-selling products accounting for 40% of sales and the ten best-selling products accounting for 73% of sales (Figure 17). However, many of these products are flavour variants of a small number of brands).



Figure 15

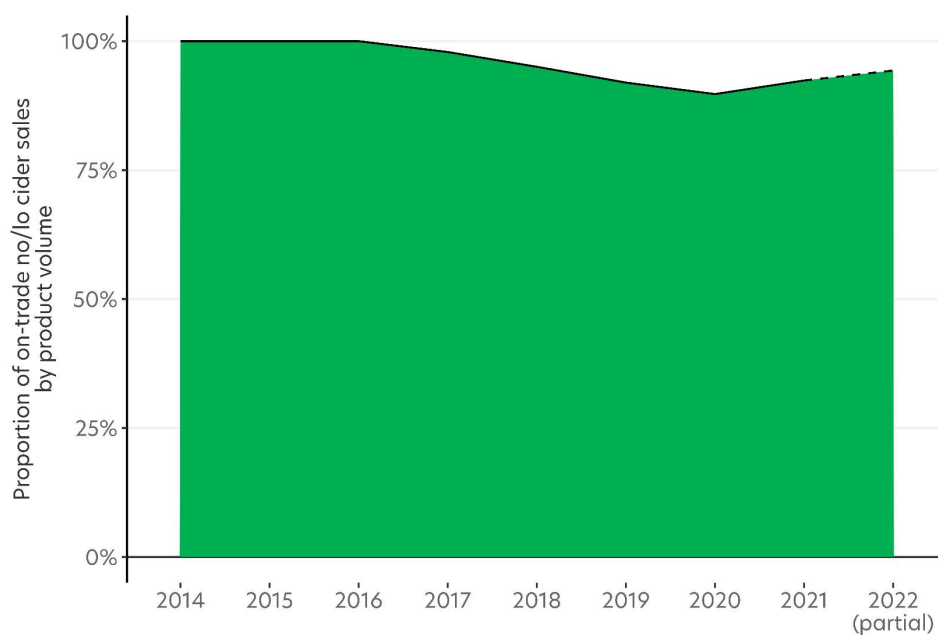
Proportion of on-trade no/lo beer sales volume accounted for by the best-selling products (only products with >5% market share shown).



Data: CGA by NIQ - OPMSTTM

Figure 16

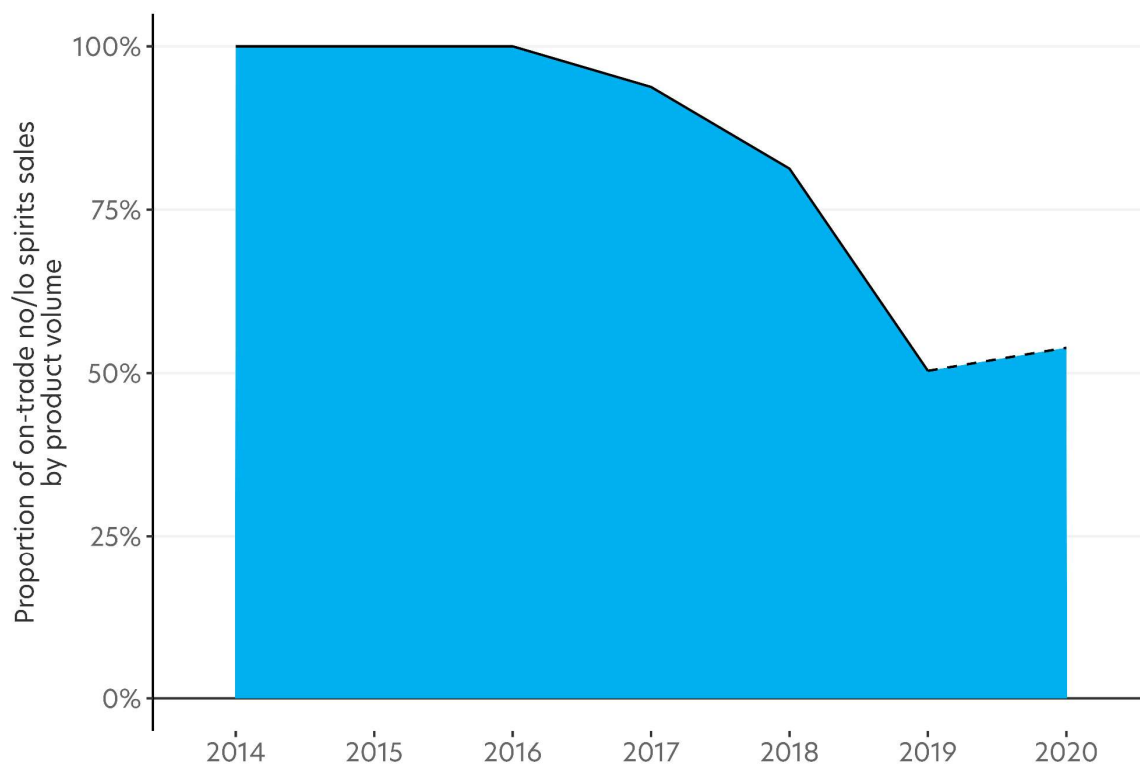
Proportion of on-trade no/lo cider sales volume accounted for by the best-selling products (only products with >5% market share shown).



Data: CGA by NIQ - OPMS™

Figure 17

Proportion of on-trade no/lo spirits sales volume accounted for by the best-selling products (only products with >5% market share shown).



Data: CGA by NIQ - OPMS™

Products with a standard alcoholic drink parent brand

No/lo sales largely come from products that have a standard alcoholic drink parent brand, such as Heineken for Heineken 0.0 or Budweiser for Budweiser Zero (Figure 18).

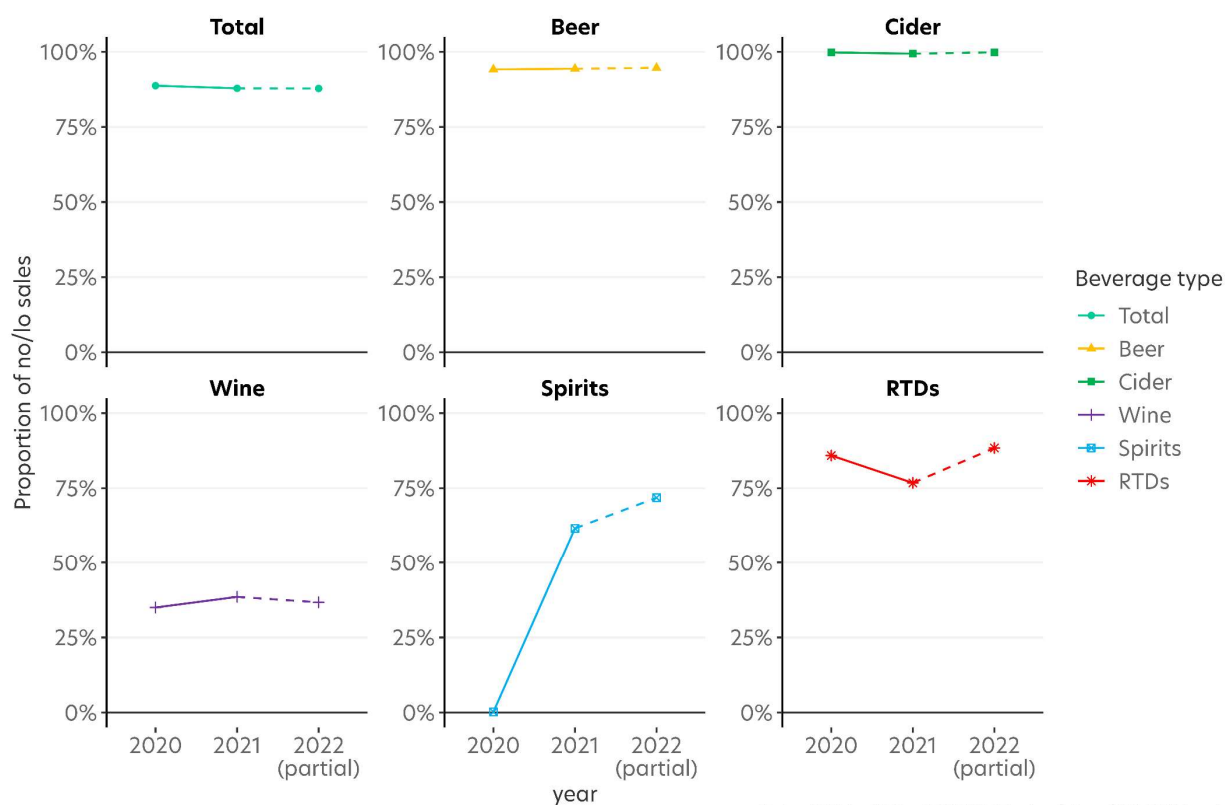
Of the 100 best-selling products by volume within each beverage category in the off-trade in 2021, 98% of no/lo beer sales come from products with a standard alcoholic drink parent brand.

The same is true for 99% of no/lo cider sales, 68% of no/lo wine sales, 66% of no/lo spirits sales and 77% of no/lo RTD sales.



Figure 18

Proportion of no/lo sales volume that comes from products with a standard alcoholic drink parent brand.



Availability of no- and low-alcohol products

At the time of writing, we only have data for the on-trade on the proportion of outlets that sell no/lo products.



As with other on-trade data, the COVID-19 pandemic affects the figures due to the restrictions on on-trade activity during 2020 and 2021, while the 2022 data is incomplete.

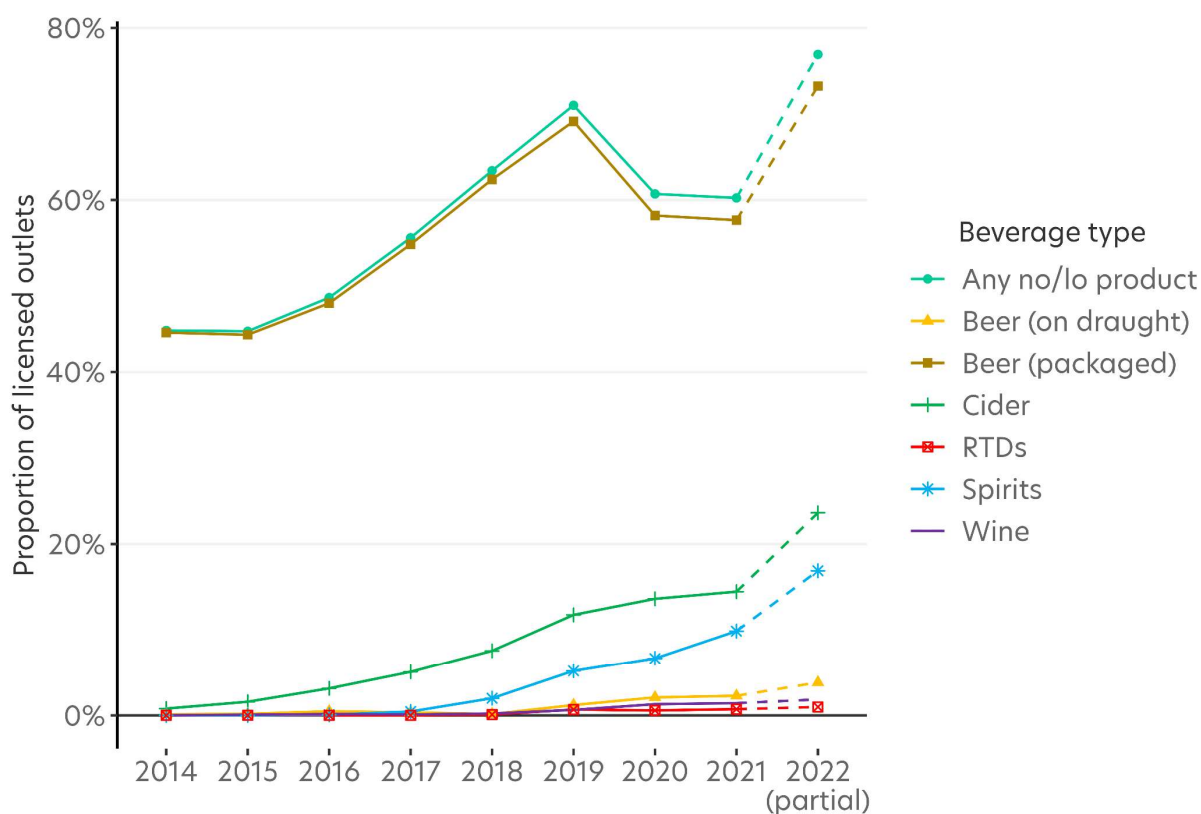
The proportion of on-trade outlets that sold packaged no/lo beer (i.e. beer in bottles or cans) increased from 45% in 2014 to 73% in the incomplete 2022 data (Figure 19).

The proportion selling draught no/lo beer was much lower but increased from 0.1% in 2014 to 3.8% in 2022. Other beverage types were less widely available.

The proportion of on-trade outlets selling no/lo products in 2022 was 24% for cider, 2% for wine, 17% for spirits and 1% for RTDs.

Figure 19

Proportion of on-trade outlets selling no/lo products by beverage type.



Data: CGA by NIQ - OPMS™

Consumption of no- and low-alcohol drinks

Data on consumption of no/lo drinks comes from adult (18+) respondents to the Alcohol Toolkit Survey in August and October 2022.

One-third (33%) of adults in Great Britain reported consuming no/lo drinks at least once in the last year (Figure 20).

Around half of these were more frequent consumers, with 18% consuming no/lo drinks at least once a month and 10% doing so at least once a week.

There was little difference in the frequency

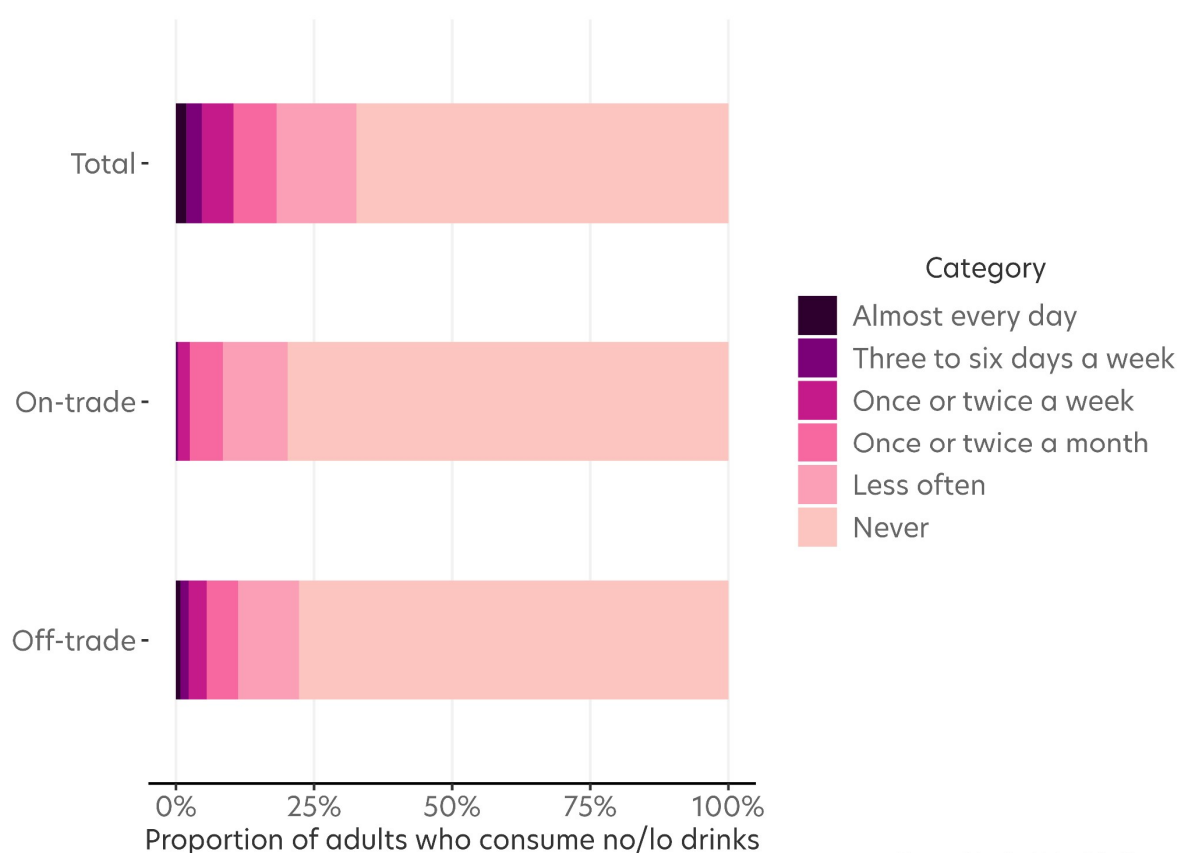
of consumption between the off-trade and on-trade.

Less than one in four adults reported consuming no/lo drinks in the last year in the off-trade (22%) or on-trade (20%).

Around one in ten consumed no/lo drinks at least once a month in the off-trade (11%) or on-trade (9%).

Figure 20

Frequency of no/lo drink consumption among adults by trade sector.



Data: Alcohol Toolkit Survey

There are only small differences in the frequency of consuming no/lo products across age groups (Figure 21).

Approximately one in three adults consumed no/lo products in the last year across all age groups, ranging from 31% of 45-54 year-olds to 36% of 35-44 year-olds.

Similarly, the proportion of adults consuming no/lo products at least once a month varied

only a small amount with age, ranging between 16% of 45-54 year-olds to 20% of 35-44 year-olds.

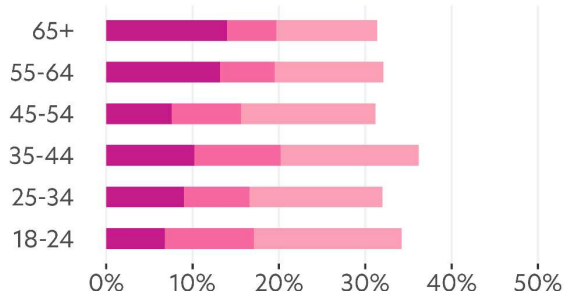
However, older adults were more likely to consume no/lo products at least once a week, with 14% of those aged 65+ doing so compared to 7% of 18-24 year-olds.

There were also small differences across age groups in the off- and on-trade.

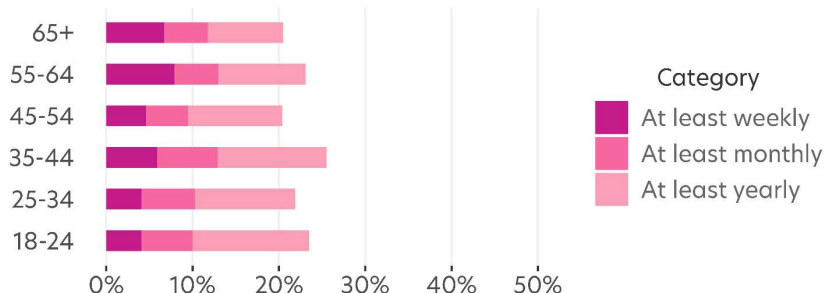
Figure 21

Frequency of no/lo drink consumption among adults by age and trade sector.

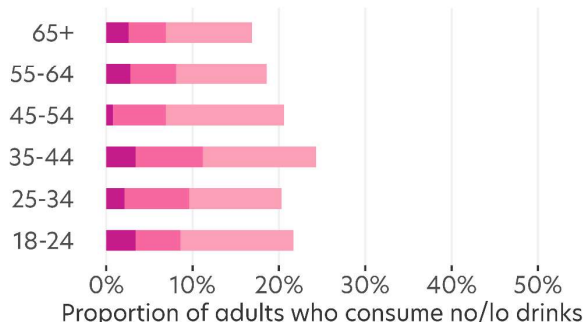
Total



Off-trade



On-trade



Data: Alcohol Toolkit Survey

People who consumed standard alcoholic drinks were more likely to consume no/lo drinks than non-drinkers (Figure 22).

Among non-drinkers, 14% had consumed a no/lo product in the last year compared to 38% of non-risky drinkers and 40% of risky drinkers*.

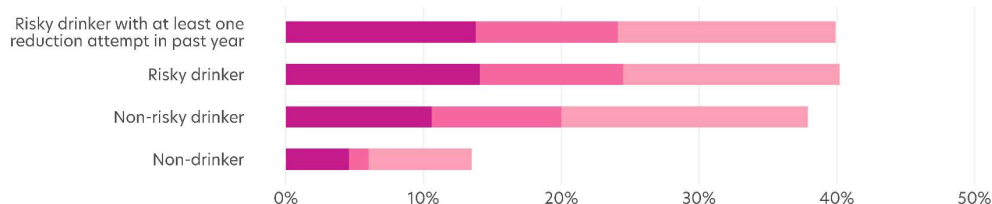
Similarly, 6% of non-drinkers consumed no/lo products monthly, compared to 20% of non-risky drinkers and 25% of risky drinkers.

The patterns are similar for consumption of no/lo products in the off-trade and on-trade.

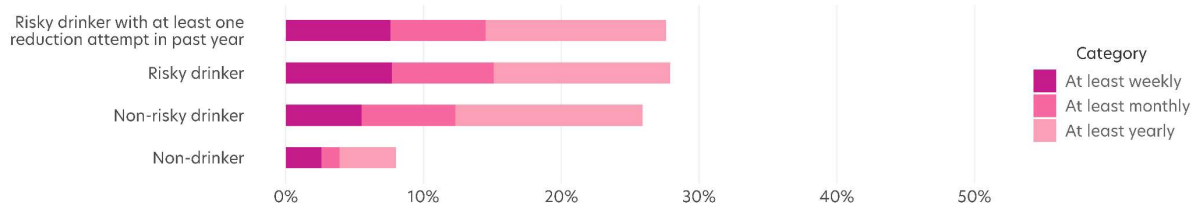
Figure 22

Frequency of no/lo drink consumption among adults by drinker group and trade sector.

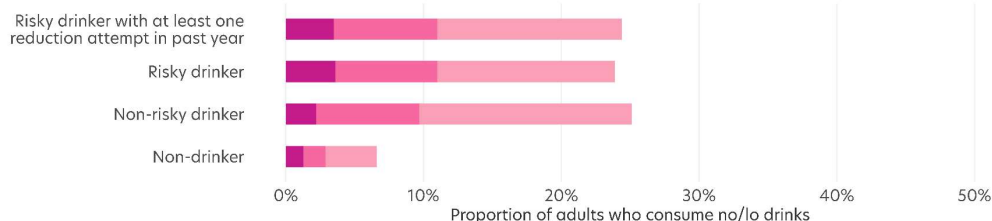
Total



Off-trade



On-trade



Data: Alcohol Toolkit Survey



There were few differences in the frequency of consumption of no/lo products between men and women (Figure 23).

Those in higher social grades are more likely to consume no/lo products and do so more frequently than those in lower social grades (Figure 24).

Almost two in five (38%) of adults in higher & intermediate managerial, administrative,

* Risky drinkers are those with an Alcohol Use Disorders Identification Test Consumption questions (AUDIT-C) score above 4.

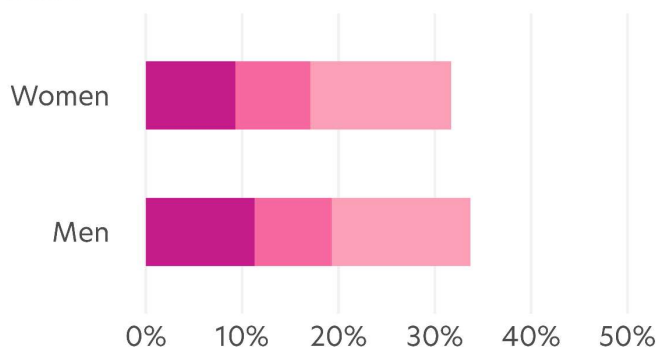
professional occupations (Grade AB) consumed no/lo products in the last year compared to 24% of those in semi-skilled and unskilled manual occupations, unemployed and lowest grade occupations (Grade E). Similarly, 26% of those in Grade

AB and 11% of those in Grade E consumed no/lo products at least once a month and 14% of those in Grade AB and 6% of those in Grade E consumed them at least once a week. The patterns were similar for off-trade and on-trade consumption.

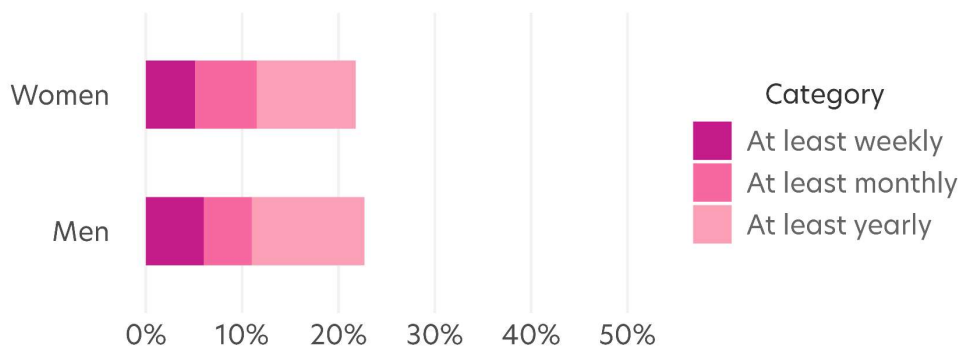
Figure 23

Frequency of no/lo drink consumption among adults by gender and trade sector.

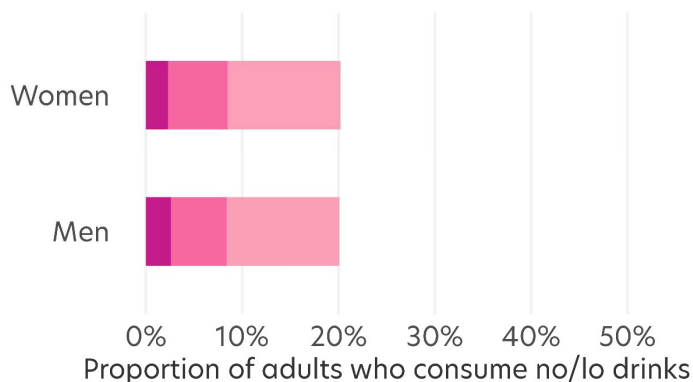
Total



Off-trade



On-trade

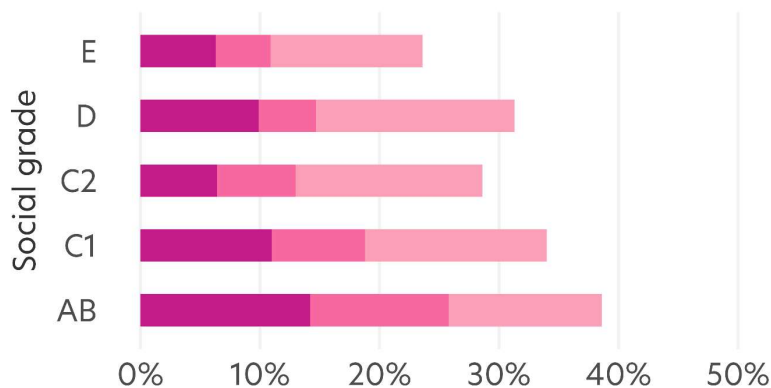


Data: Alcohol Toolkit Survey

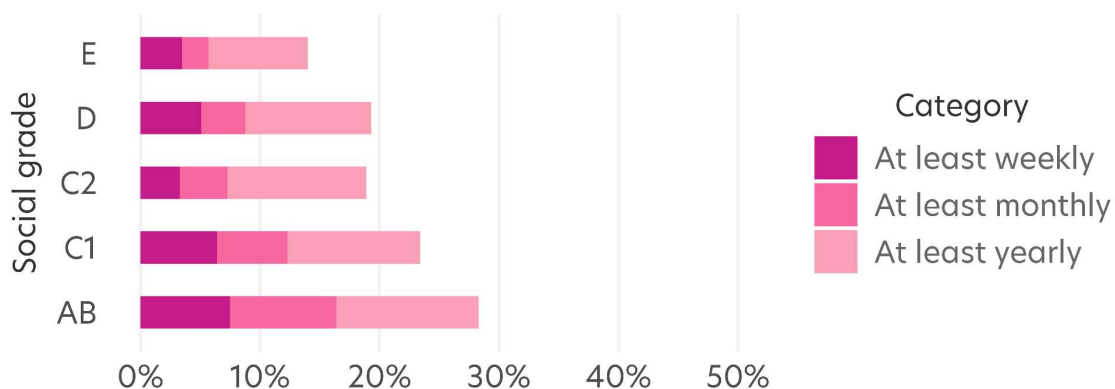
Figure 24

Frequency of no/lo drink consumption among adults by social grade and trade sector.

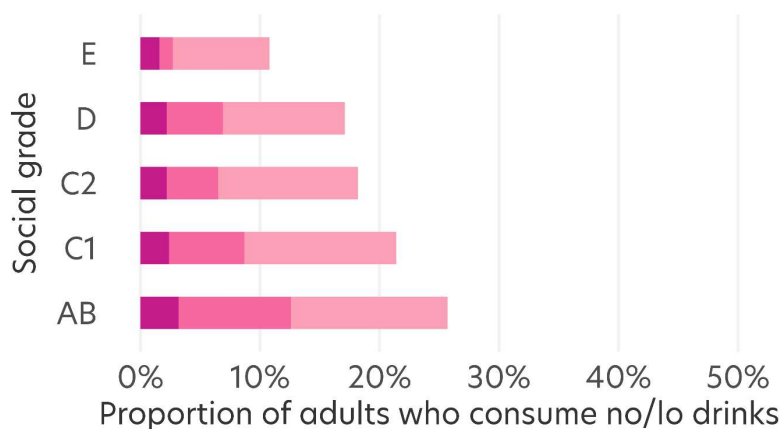
Total



Off-trade



On-trade



Proportion of adults who consume no/lo drinks

Data: Alcohol Toolkit Survey

Appendix A: Methodological information

IRI data on off-trade alcoholic drink sales

IRI provide data on off-trade alcoholic and no/lo drink sales based on a combination of electronic point of sale (EPOS) data and wholesaler data. The EPOS data come from a census of large multiple retailers, some smaller retailers and a sample of the remaining retailers. IRI then use modelling techniques to ensure the sampled data are representative of the retailer group.

Wholesaler data provides supplementary information for some convenience retailers where EPOS data is not available for all stores. Discount retailers such as Aldi and Lidl do not provide data to IRI and our findings therefore do not apply to this section of the market.

IRI provided weekly data on natural volume of sales in hectolitres of product and value of sales in millions for each stock keeping unit (SKU) in the following categories: beer, cider, perry, wine, fortified wine, spirits, and flavoured alcoholic beverages (FABs; synonymous with RTDs in the CGA by NIQ data).

SKUs are unique product identifiers that correspond to specific packages of a product that are available for purchase (e.g. 8x440ml Guinness, 700ml Smirnoff Red Label Vodka). The SKU data include the product name, package size and ABV.

Data on retailer own-brand products were only provided as a single SKU covering all products in this category. This means we cannot separate no/lo and standard own-

brand products. However, data from trade press suggests own-brand no/lo products constitute a negligible proportion of the market, so this limitation should not affect our findings.

The data were also disaggregated into 14 geographic regions within Great Britain that correspond to Broadcasters' Audience Research Board regions, including North Scotland, Central Scotland, Borders, North East England, North West England, Yorkshire, Wales, Midlands, East England, South West England, West England, London, and South and South East England.

The data cover the period from 1st January 2019 to 30th October 2022.

We aggregated SKUs into brands (e.g. Guinness 0.0%, Smirnoff Red Label), standard vs. no/lo products and beverage types for analysis.

CGA by NIQ data on on-trade alcoholic drink sales

CGA by NIQ provide data on on-trade alcoholic drinks, no/lo and soft drink sales based on a representative sample and modelling process that draws on data from more than 80,000 outlets comprising approximately three-quarters of all on-trade outlets.

The data sources include: (i) daily or weekly EPOS, wholesaler and delivery information; (ii) information from a stratified random sample of outlets on the products they stock and (iii) the outlet type and location of all on-trade premises in Great Britain.

CGA by NIQ combine these data sources to produce estimates for the whole market for four-week periods by brands and beverage types for different outlet types and geographies. They also convert four-week period data to a weekly time series using seasonality parameters for volume and value. A linear interpolation process was applied to the four-week period distribution data.

As CGA by NIQ use a sample-based approach, some products will not appear in the dataset if they are not sold in any of the sample points. This will only affect products with a low volume of sales or limited distribution.

CGA by NIQ provided weekly data on natural volume of sales in hectolitres of product and value of sales in millions for each no/lo SKU as well as aggregated totals for all standard alcoholic drinks in the following beverage categories: beer, cider, wine, spirits, and RTDs.

The data cover the period from 15th June 2014 to 13th August 2022.

Data for GB included the following regions: Scotland, North East England, Lancashire, Yorkshire, Wales, Central England, East England, South West England, London, and South and South East England.

As above, we aggregated no/lo SKUs into brands or beverage types for analysis.

Alcohol Toolkit Survey data on individual alcohol consumption

The Alcohol Toolkit Study (ATS) is a repeat cross-sectional survey that collects data from 2,450 adults (16+) living in households in Great Britain each month (1,700 in England, 450 in Scotland, 300 in Wales).

The ATS is part of a larger omnibus survey conducted via computer-assisted telephone interviews by *Ipsos Mori*. It uses a form of random location sampling that combines stratified random sampling of small geographic areas weighted by their population and, for mobile phone numbers, mobile network share with random digit dialling of numbers within the selected areas (see Kock et al. [2] for further information).

We added questions on consumption of no- and low-alcohol drinks to the August and October 2022 waves of the ATS. These asked how often respondents consumed no/lo drinks (i) overall, (ii) in the off-trade, (iii) in the on-trade and (iv) in the same occasions as standard alcoholic drinks.

All figures reported from the ATS data are calculated using survey weights.

Population data

Per-adult alcohol sales were calculated by dividing pure alcohol volumes (litres of pure alcohol) by the total population aged 16 years or older.

Estimates of the population size for England and Wales are taken from the ONS [3]. Our population estimates from Scotland are taken from the National Records of Scotland [4].

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