



Always a choice: How Socialising is Changing in Ireland

Insights into Ireland's Evolving Moderation Culture –
A HEINEKEN Ireland perspective

September 2025



THE CONTEXT: TODAY'S CHOICES

Ireland's relationship with alcohol is changing. Per-capita consumption of alcohol has fallen by 34% in the last two decades¹, 37% of Irish adults say they want to drink less (a 13 point rise from 2020 and the highest number to date)², and average consumption fell by 4.5% in the past year, down to 9.49 litres of alcohol per adult.³

This shift can be observed in the significant growth of non-alcoholic beer in Ireland. In 2024, sales of non-alcohol beer grew by 25% and production surged by 77%.⁴ This represents a 150% increase in market share over a five-year period.⁵

Yet culture is shifting faster in values than in behaviours - especially when it comes to younger generations. The latest Drinkaware barometer found that 54% of 18-24-year-olds say they would like to drink less often, and 57%, have already made small positive changes⁶.

¹ Drinks Ireland, Annual Beer Market Report

² Drinks Ireland, Annual Beer Market Report

³ Drinks Industry Group of Ireland, 2025

⁴ Drinks Ireland 2025

⁵ Drinks Ireland, Annual Beer Market Report

⁶ Drinkaware

Research Overview & Objectives

Sharon Walsh, Managing Director of HEINEKEN Ireland, highlights that moderation in alcohol consumption is becoming more popular among Irish adults: “The new research shows that this trend is not just temporary, as more people are choosing to drink less and want to continue doing so in various social situations. HEINEKEN Ireland sees potential for further growth in promoting a vibrant social life without compromising on moderation. The company aims to build on its leadership in the 0.0 alcohol category and support new cultural norms around moderation.”

Since the launch of Heineken 0.0 in 2018, HEINEKEN Ireland has been a leader in developing this category. To dig deeper into how moderation culture is evolving, we have now undertaken new national research,⁷ as part of the Brew a Better World Sustainability Strategy programme, to uncover the social realities and emerging cultural codes around alcohol moderation in Ireland, informing how the drinks and hospitality sectors can help shape a more inclusive, stigma-free socialising culture.

Key themes include: socialising and consumption patterns, stigma and social pressure, culture and changing norms, and the barriers to moderation.

This research provides insight into what moderation-based socialising looks like, and explores opportunities for businesses, brands and institutions to champion freedom of choice.

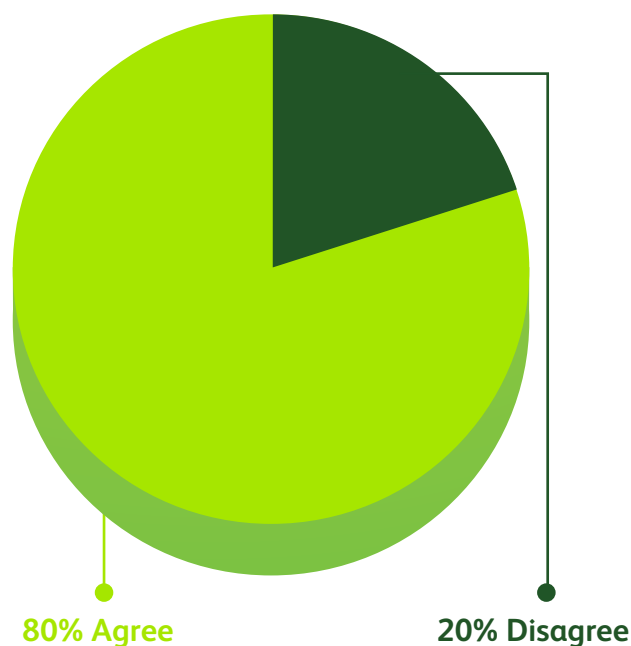


A Nation in Transition

Traditionally, alcohol has always been part of the Irish story of socialising, as a symbol of togetherness, celebration and connection. Today, that story is expanding, with moderation and choice becoming just as central to social occasions. This story is not about less socialising, but about greater choice. People want to enjoy nights out, family gatherings and workplace occasions in a way that feels right for them: sometimes with a drink, sometimes without. It is a cultural shift that reinforces that what we drink is always a choice. It reflects modern Ireland: health-conscious, socially inclusive and still deeply connected in the joy of coming together.

The majority of Irish people are observing this shift: the vast majority, 69%, agree that 'Irish drinking culture is changing - and moderation is finally starting to feel normal.' This sentiment is highest among adults aged 45–54 at 77%. Only 1% of the population strongly disagreed with this statement, with 9% disagreeing overall.

Rising Cultural Permission to Moderate



Q: Do you think there's more of a cultural permission to say 'I'm drinking less' than five years ago'

Research Overview Summary⁸

Key Data Points

Greater social permission to moderate:

80% believe there is more cultural acceptance today to say "I'm drinking less" than there was five years ago, and 69% agree that 'Irish drinking culture is changing - and moderation is finally starting to feel normal.'

Pacing & moderation becoming mainstream:

56% reported pacing themselves at recent social occasions; nearly a third were not consuming alcohol (either themselves or the entire group).

The joy of moderation:

87% have had some of their most enjoyable social moments when they are moderating or not drinking alcohol at all. 50% are more excited about socialising in groups of friends that moderate.

Lingering social stigma:

53% admitted to drinking even when they didn't want to and 31% find it hardest to moderate because they have to explain themselves, showing that social norms still influence behaviour.

Gender differences in moderation styles:

Women are more likely to moderate by drinking water, 0.0 or soft drinks, while men looking to moderate are more likely to abstain from drinking alcohol in social settings.

Drinking choices are influenced by a myriad of social and cultural cues. In order to create a mainstream culture of moderation, it is critical to understand the social context. In recent years, there has been a positive increase in cultural permission to drink less: 80% agree that 'there's more cultural permission to say 'I'm drinking less' today than five years ago.'

Growing Recognition of the Joy of Moderation

People are drinking less for many reasons - health, financial, social and beyond.⁹ Balance enhances the social experience.

- ◆ Most people (87%) claim to have some of their most enjoyable social moments when they are moderating or not drinking alcohol at all.
- ◆ When asked about a really enjoyable social occasion, the majority, 56%, said they were drinking alcohol and paced themselves.
- ◆ 19% reported having an enjoyable time abstaining from drinking, while others were drinking.

This data illustrates that whilst alcohol is part of many enjoyable socialising occasions, a vibrant social life is possible for both those who choose to enjoy alcohol in moderation and those who choose non-alcohol options.

There is great enthusiasm for socialising with those who moderate their drinking: Half of people surveyed (50%) are more excited about socialising in groups of friends that moderate.

Gender Nuance: Females reported a higher percentage of paced drinking: 62% of women say they paced themselves at an enjoyable social event in the past year, in comparison to 48% of men.

Demographic Nuance: This excitement was strongest among the younger (18-24-year-old) cohort at 55%, compared to 34% for older generations aged 55+.

Defining moderation in social occasions

The data makes clear that moderation does not carry a single definition. For some, it means reducing the number of drinks; for others, it means alternating by drinking water, soft drinks or with 0.0 options; for a smaller group, it means abstaining altogether. This variation underscores that moderation is not a fixed behaviour but a spectrum, shaped by individual preference, social context, and occasion. For businesses and brands, this represents a powerful opportunity: to support every interpretation of moderation and ensure that all choices feel valid and celebrated. At its heart, the insight is simple: it's always a choice.

'Drinking alcohol while also drinking water or soft drinks' is the most popular (33%) description of 'moderation'. This approach can be described as Zebra Stripping – swapping between alcohol and alcohol free drinks.

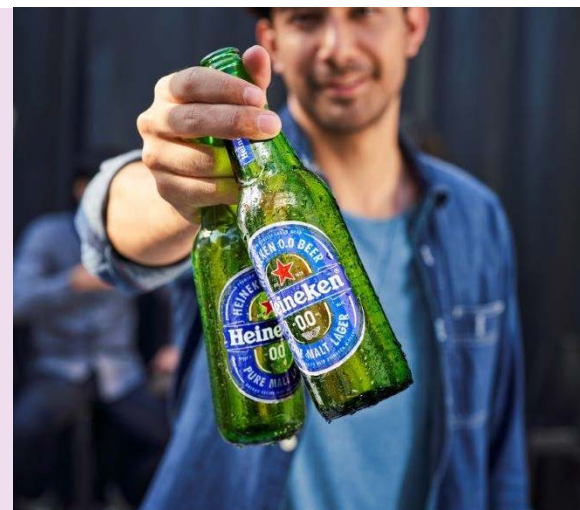


"Drinking habits are shifting. More people are choosing to moderate in ways that suit them, and Zebra Stripping is just one example that's really taking off. It's all about being thoughtful and creative with new habits, so there's always a choice, the end result is equality of experience."

Laura Willoughby MBE, Co-Founder at Club Soda, a social impact business that exists to help people drink more mindfully and live well.

"Irish rounds are a particular thing, a ritual intrinsically linked to our drinking and pub culture. There are unique rules, peculiarities and complexities. When it comes to moderation, people are becoming more confident in speaking up at the beginning of a round - making sure that people aren't making presumptions for them."

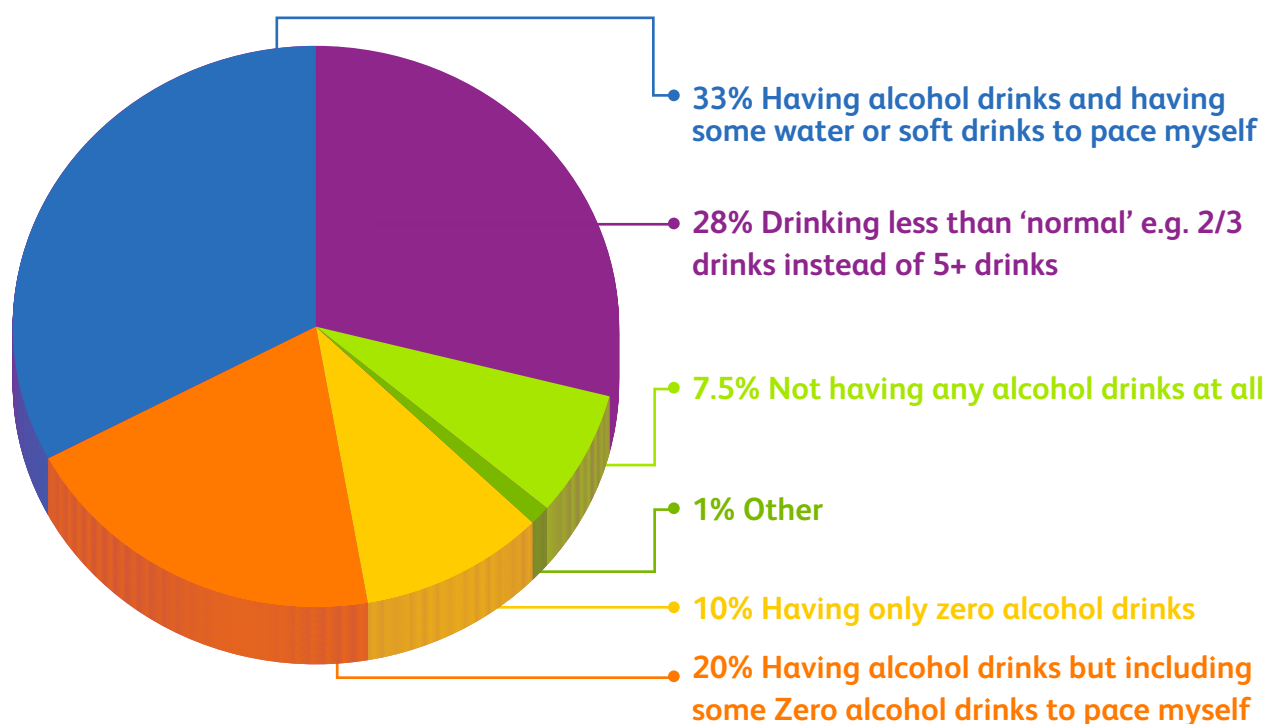
**Ali Dunworth, Author of
A Compendium of Irish Pints:
The Culture, Customs and Craic**



Zero (0.0) alcohol drinks are becoming more central to people's definition of moderation in social occasions, highlighting how important this category is in shaping habits and normalising more flexible drinking habits.

"We've seen a rapid growth in interest and curiosity from customers in 0.0 offerings in the last 12 months. It's a meaningful cultural shift and presents a real opportunity to drive new kinds of social occasions within the trade."

Michael O' Donovan, President of the Vintners' Federation of Ireland (VFI)



Q: What does moderation mean to you in a social occasion?

Demographic Nuance: The data shows some significant gender differences in moderation styles – women are more likely to pace themselves (62%), while men are more likely to go completely sober in social settings (24%).

Accelerating Moderation: The Social Script

Nearly one in five (18%) say they don't find it difficult to moderate at all.

Socialising without alcohol is 'just as good'

When asked about socialising without alcohol, nearly one in three (29%) say that it's 'just as good' as socialising with alcohol - reinforcing how mainstream moderation is becoming.

Yet for many, choosing to moderate or not to drink can feel like disrupting invisible group dynamics - a fear of breaking with tradition or social expectations.



Nearly one in five (18%) say they don't find it difficult to moderate at all.

◆ The desire to blend in

Over half of Irish people (53%) have said they've drunk even when they didn't really want to.

◆ People respond to perceived social expectations

Almost half (48%) of people have made up an excuse to avoid drinking and 34% have 'pretended to drink alcohol in a social setting to avoid questions.'

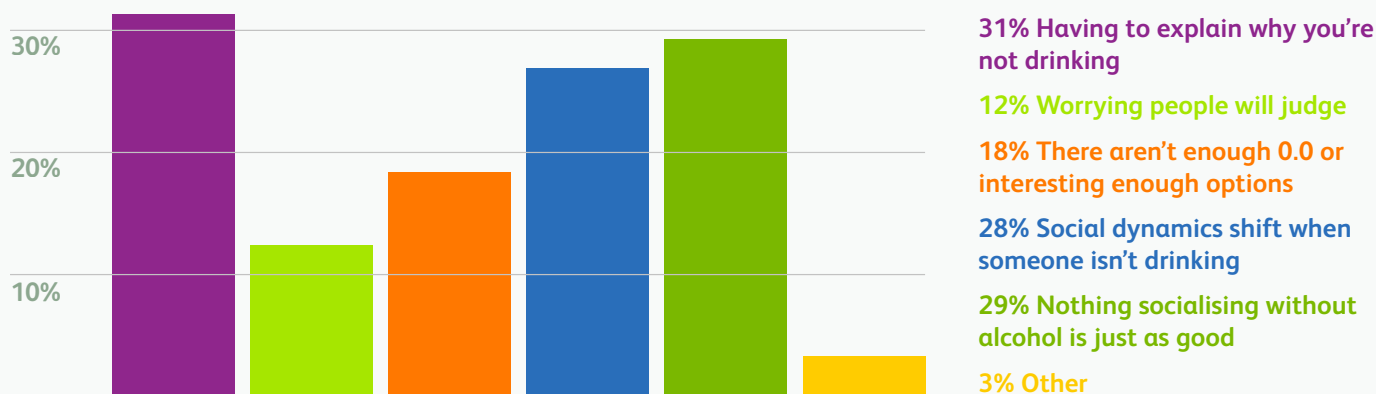
◆ Opportunity for greater acceptance

31% find it hardest to not drink when socialising because they feel like they have to explain why to those around them.

This highlights the influence of socialising on drinking behaviours and underlines the importance of creating supportive environments where moderation in all forms is always a choice, to make socialising in moderation even easier and more popular.

There is an opportunity and openness to innovation in the 0.0 drinks category to continue to evolve and grow the category.

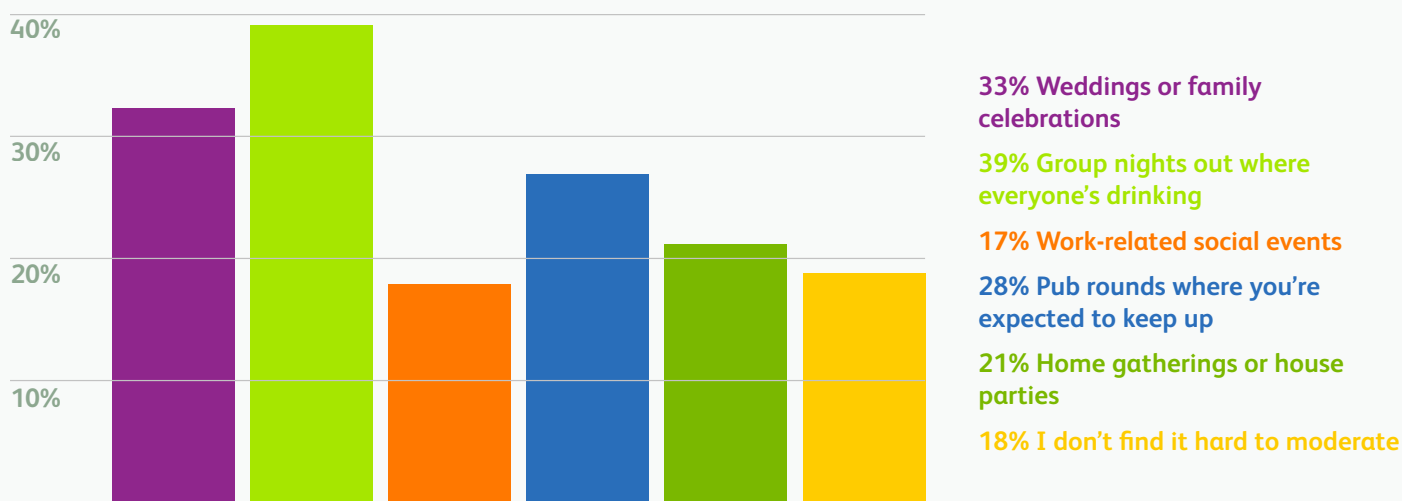
Q: What's the hardest part of socialising without alcohol?



Social occasions matter when it comes to moderation

Irish adults report that, on average, 'first dates or romantic settings' are the least difficult social occasions to moderate alcohol consumption. Big group nights out (39%), weddings and family celebrations (33%), and pub rounds (28%) are the occasions where people find it more of a challenge to moderate.

Q: In which situations do you find it hardest to moderate your drinking (or not drink at all) - even when you want to?



Demographic Nuances: The data shows that demographics experience moderation differently in a variety of social occasions. Younger adults (18–24) find it hardest to moderate on big nights out (53%) and house parties (34%) and find it easiest to moderate at funerals or wakes (only 2% find it hard).

In contrast, older groups (55+) find it harder to moderate at family events (43%) or during funerals/wakes (24%) and easiest at sports events or match days (only 5% find it hard).

Meanwhile, men find it more difficult to moderate in pub rounds (32%) and sports events (18%), while women find moderation more difficult at weddings (36%) and group nights out (37%).

These insights present a clear opportunity for even greater normalisation of moderation in culture through changing social norms. People are looking for even greater social permission to choose to moderate on their own terms.

Opportunity for Cultural Growth: Create More Space for Every Choice

How can businesses, brands, and institutions enable more behavioral flexibility and champion more freedom of choice? The way we socialise is evolving. Businesses that respond to this shift in demand (by enabling even greater freedom for people to choose what suits them best) can expand their relevance, increase participation in social occasions, and lead the charge in modern Irish culture.

“There is a growing opportunity for cultural and commercial leadership in the moderation space. The fact that so many more people (across all age groups) are aspiring to moderate, even while navigating social pressures, shows how deeply the desire for balance is embedded. By creating spaces, products, and narratives that normalise moderation, we can empower this generation to live out the choices they already want to make. At HEINEKEN, our sustainability programme Brew a Better World provides a mandate for moderation - empowering consumers by providing choice, ensuring transparency of information and using the power of our strategic brand to advance responsible consumption campaigns.”

Barbara-Anne Richardson, Sustainability and Public Affairs Manager, Heineken® Ireland

Choice in Hospitality & Venues

- ◆ People increasingly want a choice - not a binary between “drinking” or “not drinking.”
- ◆ Pubs, bars, and restaurants can win loyalty by accelerating even greater availability and elevating alcohol-free and low-alcohol options to the same level as traditional serves (presentation, ritual, visibility).

Choice in the Beverage Industry

- ◆ Younger demographics are already mixing traditional drinks with non-alcoholic ones.
- ◆ Brands that create and champion desirable, high-quality moderation options will be seen as leaders in shaping the “new normal” of socialising.

From Now to Next: From Mainstream to Popular

Mainstream usually suggests something widely accepted, safe, or part of the status quo. Popular, on the other hand, often implies cultural resonance, trend-setting, and desirability beyond just wide adoption.

CULTURAL SHIFTS REQUIRES TO MAKE MODERATION POPULAR

From	To
Sometimes a Choice	Always a Choice
Blending in	Pride Confidence in saying no/less
Explanations	Acceptance No justification required
Social Expectations	Social Support and Encouragement
Limited choice Perceived as limited in availability & occasions	More choice Balanced & exciting 0.0 options for all occasions

Heineken Ireland's commitment to moderation in Ireland

HEINEKEN Ireland has invested over €30 million to grow the Heineken® 0.0 brand locally, with a strong focus on responsible consumption. In 2023, globally, over 15% of Heineken® media spend was invested by our operating companies in dedicated responsible consumption campaigns.

Their campaigns are tailored to resonate with Irish consumers. The “When You Drive, Never Drink” campaign featuring Max Verstappen has been widely recognised, and sponsorship of the UEFA Europa League Final in Dublin brought the message of choice and moderation to a national stage.



Their latest campaign, “Always a Choice”, champions Ireland’s growing moderation culture by exploring both the barriers and the opportunities that shape it, supporting stigma-free socialising, whether with alcohol or without. We want to make sure consumers always have a choice when it comes to low and no-alcohol beers and ciders and to give them the information they need to make that choice.

HEINEKEN Ireland is proud to lead the moderation movement in Ireland. Since launching Heineken® 0.0% in 2018, they have consistently invested in innovation, education, and visibility to make alcohol-free beer a confident, everyday choice. Holding a 43.2% market share, their pioneering draught systems that are now available in 3,000 outlets, strategic partnerships, and culturally resonant campaigns have positioned us as the market leader in the non-alcoholic beer category. From new glassware that celebrates the perfect pour to occasion-led activations and ambassador-led campaigns, they are shaping the future of socialising—one choice at a time.

“At Heineken, we never compromised on quality – and that’s especially true for Heineken® 0.0%,” said PJ Tierney, HEINEKEN Ireland’s Master Brewer. **“Every pint of 0.0% is brewed with the same care, craft, and ingredients as our original lager.”**

For more, visit:

<https://www.heinekenireland.ie/sustainability/brewing-better-world-2030>