Alcohol-free and low-alcohol drinks in Great Britain

Monitoring report on 2023 data

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Glossary of key terms and abbreviations

ABV	Alcohol by volume, the proportion of a product that is made up of pure alcohol.
All alcoholic drinks	Alcoholic drinks (e.g. beers, ciders, wines, spirits) irrespective of their alcohol content, including no/lo drinks.
ATS	Alcohol Toolkit Study, a monthly household survey that collects data on consumption of alcoholic and no/lo drinks.
EPOS	Electronic point of sale (e.g. tills in shops and bars).
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, a unique product (e.g. 6 x 330ml Heineken 0.0 or 700ml Gordon's Gin).

Executive Summary

Data from Circana and CGA by NIQ show that the alcohol-free and low-alcohol (no/lo) drinks market continued to grow in Great Britain in 2023, with increases in both sales volume and value. The proportion of all alcoholic drinks sales accounted for by no/lo drinks also continued to increase. However, there is mixed evidence on whether rising sales were due to more people buying no/lo drinks or existing customers buying larger amounts.

Retailers sold 1.5 litres of no/lo drinks per adult in Great Britain in 2023 and 78.4 million litres in total. The total value of these sales was £362m. The proportion of total alcohol drinks sales accounted for by no/lo drinks rose to 1.4% of sales volume and 0.8% of sales value. This proportion remained substantially higher in the off-trade (i.e. shops and supermarkets) at 1.9% than the on-trade (e.g. pubs, restaurants and nightclubs) at 0.7%. It also remained substantially higher for beer at 1.7% or 2.6% for off-trade beer. Beer continued to dominate the market, accounting for 78% of sales of no/lo drinks by volume and 70% of sales by value.

The average price of no/lo drinks has fallen in real-terms over recent years, but there is some evidence this decline has stalled. The average price of no/lo beer in the off-trade increased by £0.12 or 4% between 2022 and 2023. No/lo beer and cider also remained more expensive on average than standard beer and cider in the off-trade and on-trade. However, no/lo wine, spirits and RTDs (a collective name for alcopops or pre-mixed spirits) were cheaper than their standard alcoholic equivalents in the off-trade. The higher average price of no/lo beer and cider was mainly due to a lack of low-priced no/lo products rather than products being sold for particularly high prices.

The off-trade no/lo drinks market was still dominated by a small number of major brands, with the top ten products accounting for 77% of no/lo beer sales, 99% of no/lo cider sales and 94% of no/lo spirits sales. Products with a parent brand that is used for a standard alcoholic drink (e.g. Heineken for Heineken 0.0) also still dominated the market. Among the 100 top selling products by volume, 84% of sales came from products with a standard alcoholic parent brand.

"Among the 100 top selling products by volume, 84% of sales come from products with a standard alcoholic parent brand."

The availability of no/lo products in on-trade outlets continued to increase, with 74% of outlets selling no/lo beer. This was mostly bottles and cans, with only 5% of on-trade outlets selling no/lo beer on draught.

In data from the Alcohol Toolkit Study collected in 2024, 31% of adults in Great Britain reported consuming no/lo drinks at least once a year, with 18% doing so at least once a month and 9% doing so at least once a week. There has been little change in these figures since 2022. Consuming no/lo drinks remained more common among those of higher social grade and those who also drink standard alcoholic drinks. Frequent consumption of no/lo drinks remained more common among people consuming alcohol at risky levels.

Data from Kantar's Worldpanel Take Home Purchase panel shows that 20% of households bought a no/lo drink in the off-trade in 2023, up from 12% in 2018. In contrast, 88% of households bought a standard alcoholic drink in 2023. Almost all of the households (96%) who bought a no/lo drink in 2023 also bought a standard alcoholic drink. Among households who bought no/lo drinks, the average volume bought and amount of money spent had not increased since 2018. However, among households who bought both standard alcoholic and no/lo drinks, the proportion of their weekly purchases that are no/lo drinks has steadily increased over time.

Data sources

This report presents descriptive information from four datasets:

CGA by NIQ data on alcoholic drink sales in the on-trade (e.g. pubs, bars and restaurants) collected between 2014 and 2023.

Circana data on alcoholic drink sales in the off-trade (e.g. shops and supermarkets) collected between 2020 and 2023.

Kantar's Worldpanel Take Home Panel data on household purchasing collected between 1st January 2018 and 30th December 2023.

Alcohol Toolkit Survey data on individual consumption among adults collected in August, October, February and April between August 2022 and October 2024.

A note on timing of data and previous reports

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.

Figures for 2022 and earlier years may differ from those in our previous report [1] for two reasons. First the 2022 data in our previous report was incomplete for CGA by NIQ and Circana, but now covers the full year. Second, the same data providers update their datasets on a continuous basis to incorporate new information, correct errors or add products that previously did not meet their inclusion criteria. The current report therefore includes updated and improved estimates of figures for each year.

Terminology

Throughout this report, we refer to alcohol-free 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 alcoholic drinks combined as **all alcoholic drinks** for brevity but we recognise that many of the no/lo drinks sold in Great Britain contain little or no 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.

Alcohol-free and low-alcohol drink sales

Data on no/lo drink sales start from 2020 in the off-trade and 2014 in the on-trade and continue to the end of 2023.

Sales volumes in 2023

Retailers sold 1.5 litres of no/lo drinks per adult across the off-trade and on-trade in Great Britain in 2023 and 78.4m litres in total (Figure 1). This was split between 1.2 litres per adult in the off-trade and 0.3 litres per adult in the on-trade.

No/lo beer dominated total, off-trade and on-trade sales of no/lo drinks. It accounted for 78% of total sales volume, 77% of off-trade sales volume and 82% of on-trade sales volume in 2023 (Figure 2). In contrast, cider accounted for 11% of no/lo sales volume in the off-trade and 16% in the on-trade. Wine accounted for 9% of no/lo sales volume in the off-trade, but a negligible amount in the on-trade. Similarly, spirits and RTDs accounted for no more than 1% of no/lo sales volume in either trade sector.

No/lo drinks sales accounted for 1.4% of all alcoholic drink sales by volume in Great Britain in 2023. This figure was higher in the off-trade where no/lo drinks accounted for 1.9% of alcoholic drink sales, and lower in the on-trade where they accounted for only 0.7% of sales (Figure 3).

No/lo beer accounted for 1.7% of all beer sales by volume in 2023 (Figure 4). No/lo products also accounted for 1.3% of all cider sales, 0.8% of all wine sales, 0.3% of all spirits sales and 0.4% of all RTD sales.

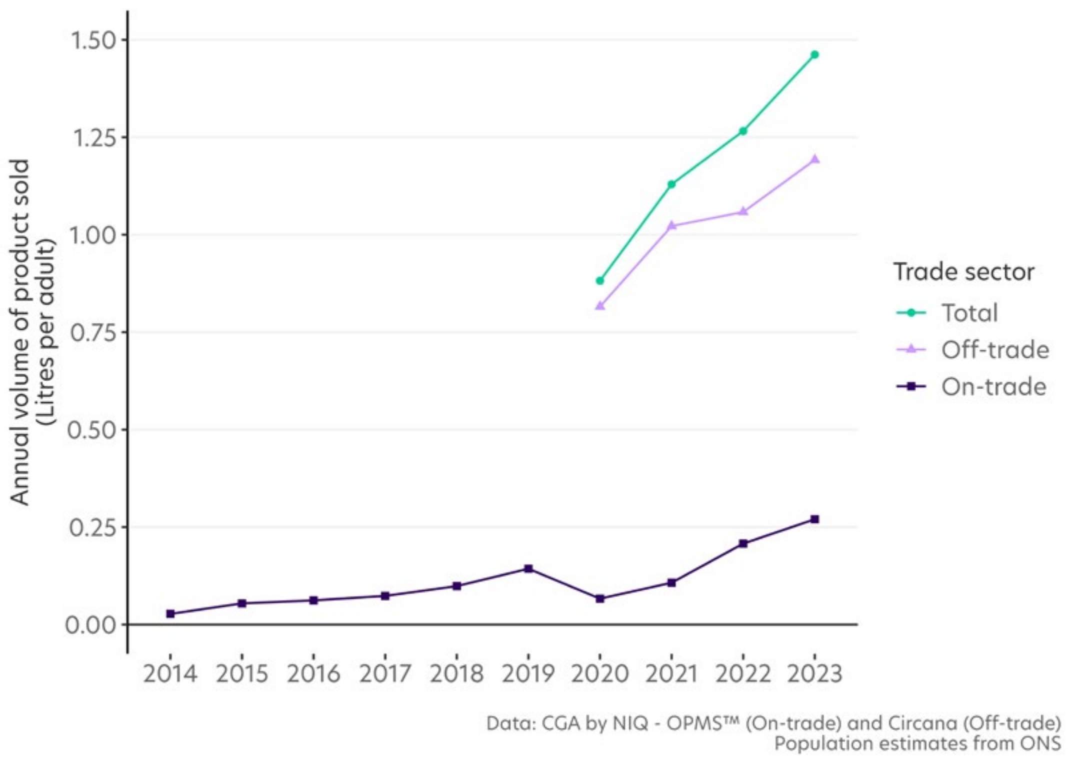

Figure 1. Annual volume of no/lo product sold in litres per adult by trade sector.

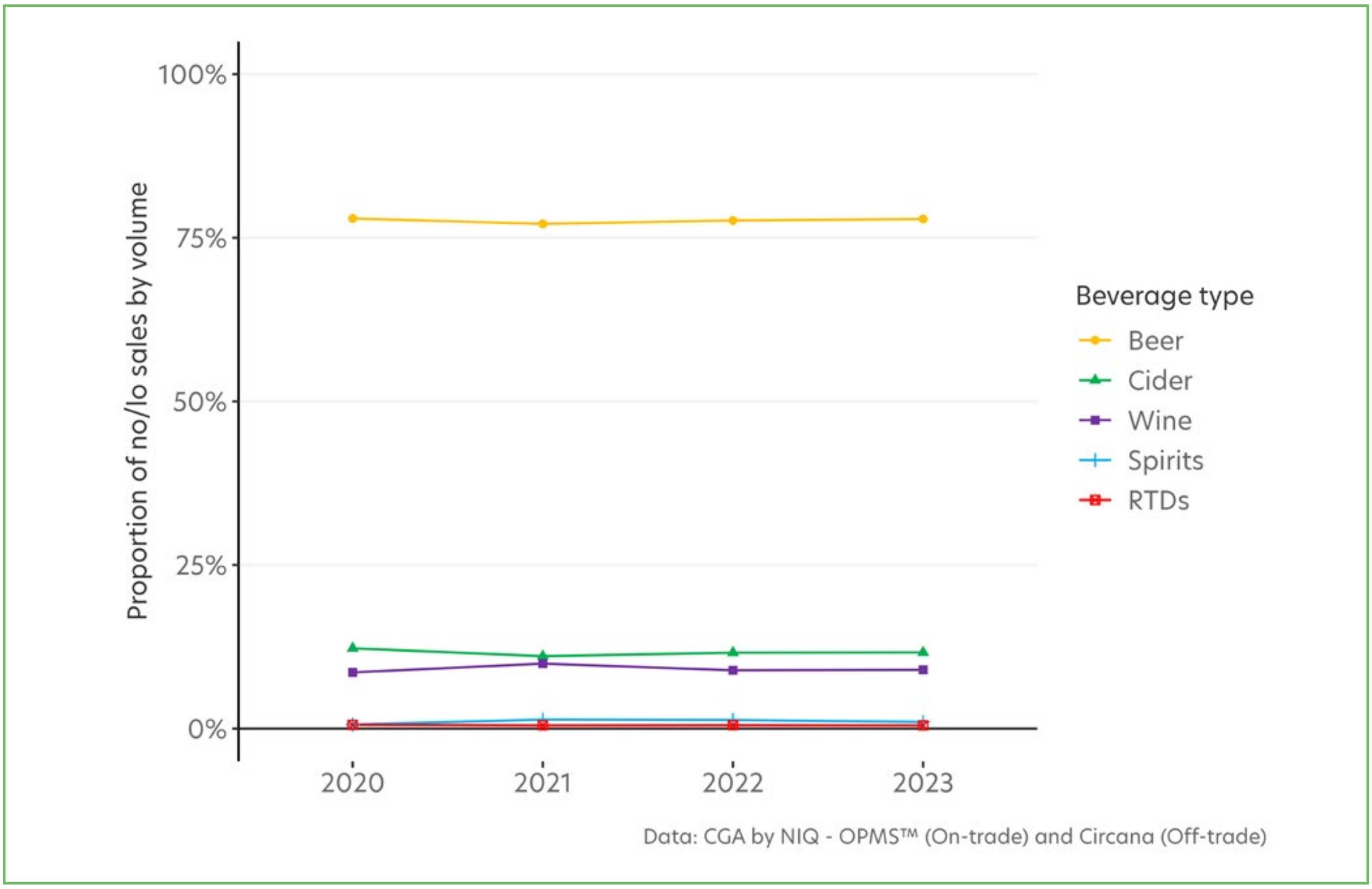

Figure 2. Proportion of the volume of no/lo product sold accounted for by beverage types (on- and off-trade combined).

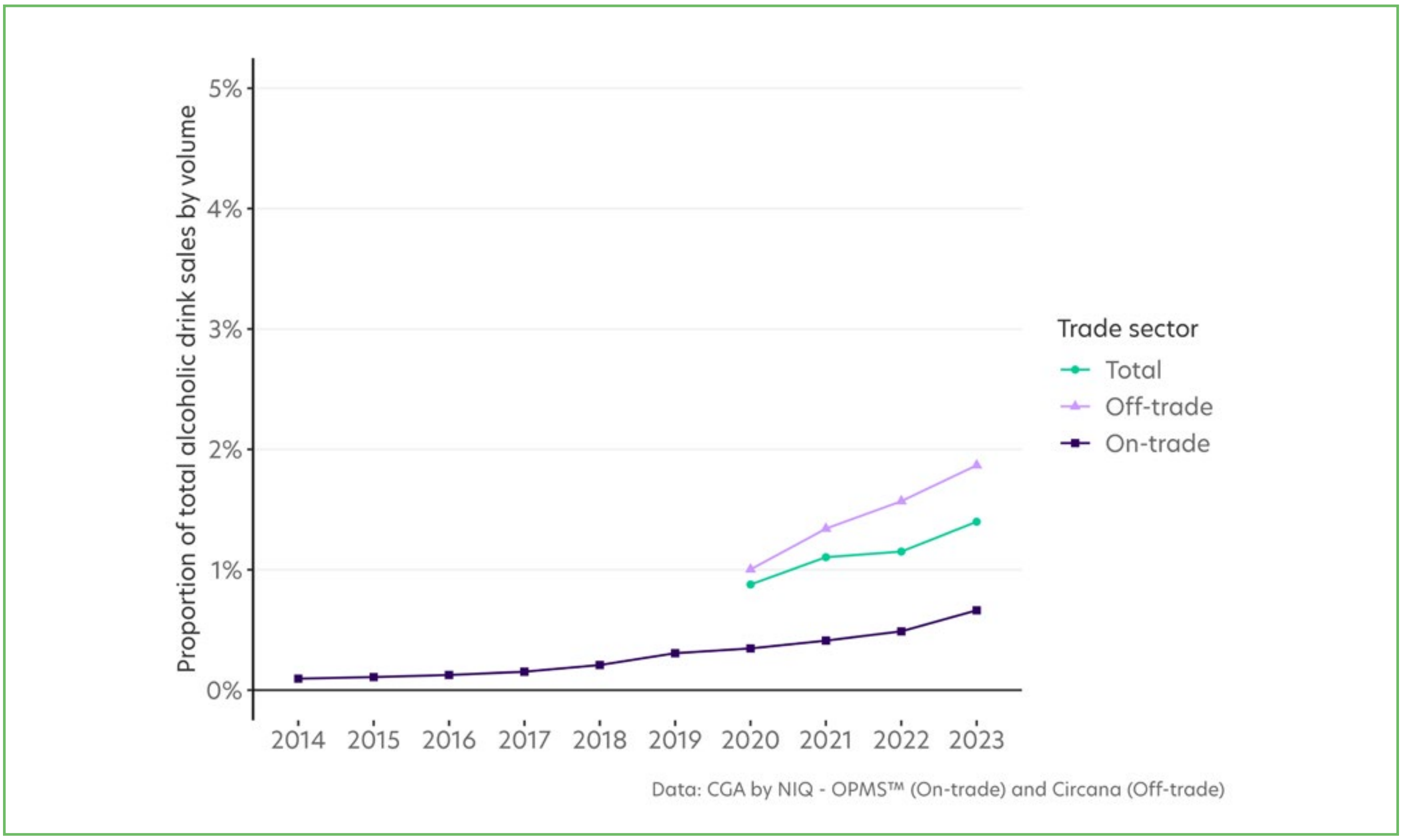

Figure 3. Proportion of total alcoholic drink sales volume accounted for by no/lo products by trade sector.

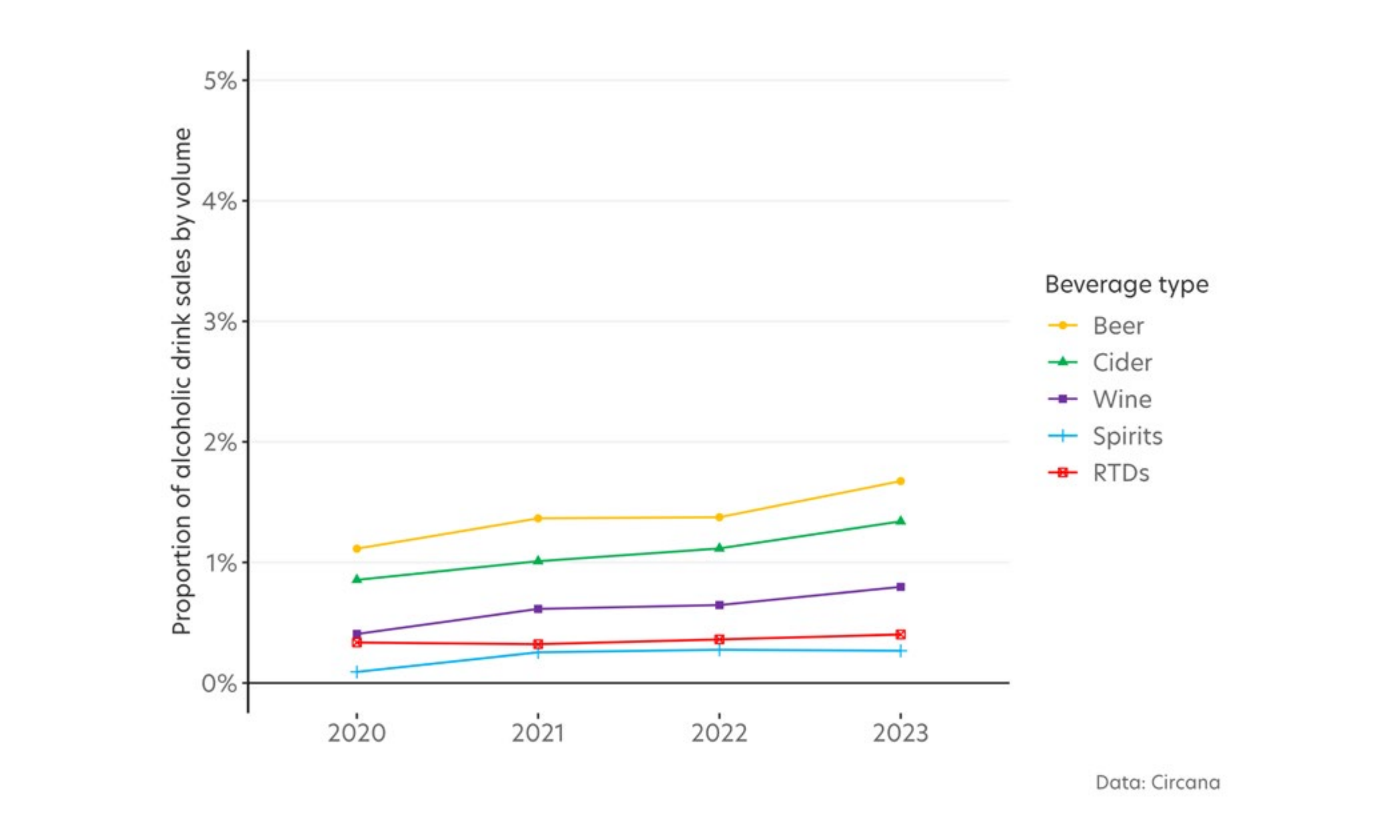

Figure 4. Proportion of alcoholic drink sales volume accounted for by no/lo products by beverage type (on- and off-trade combined).

The market share of no/lo beer and cider was larger in the off-trade where no/lo products accounted for 2.6% of all beer sales, 1.6% of all cider sales, 0.9% of all wine sales, 0.3% of all spirits sales and 0.4% of all RTD sales (Figure 5). In the on-trade, no/lo cider accounts for 0.9% of all cider sales, which was greater than the 0.7% of all beer sales accounted for by no/lo beer. Other no/lo beverages accounted for no more than 0.2% of sales within their category in the on-trade.

Sales value in 2023

The total value of no/lo drinks sales in Great Britain in 2023 was £362m, 0.8% of all alcoholic drinks sales by value. The value of no/lo drinks sales was £210m in the off-trade and £153m in the on-trade, accounting respectively for 1.1% and 0.6% of total alcoholic drinks sales.

As with sales volume, no/lo beer accounted for most of this sales value, with 70% of total value, 65% of off-trade value and 76% of on-trade value coming from no/lo beer in 2023. In contrast, cider, wine and spirits each accounted for between 8% and 11% of total sales value (Figure 6). Notably, no/lo wine accounted for 18% of no/lo sales value in the off-trade but only 1% in the on-trade.

No/lo beer accounted for a smaller share of no/lo sales value than sales volume because beer is sold in larger volumes per serving than most other drinks (e.g. 330ml bottles rather than a 25ml shot of spirits). Sales value therefore represents a more accurate measure of how no/lo sales are distributed across beverage types. However, the typically higher price per serving for spirits relative to beers and ciders means it is also an imperfect measure.

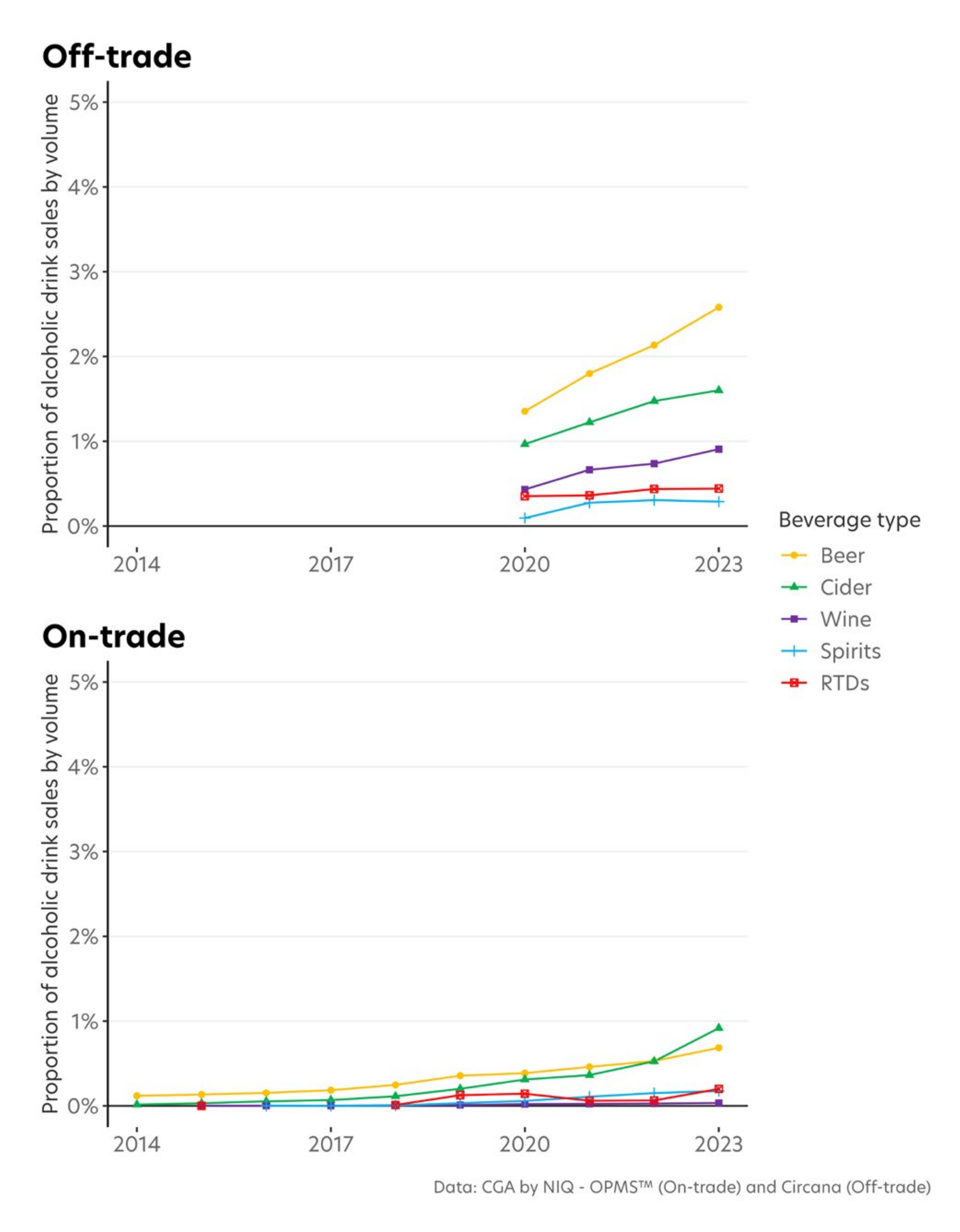

Figure 5. Proportion of alcoholic drink sales volume accounted for by no/lo products by beverage type.

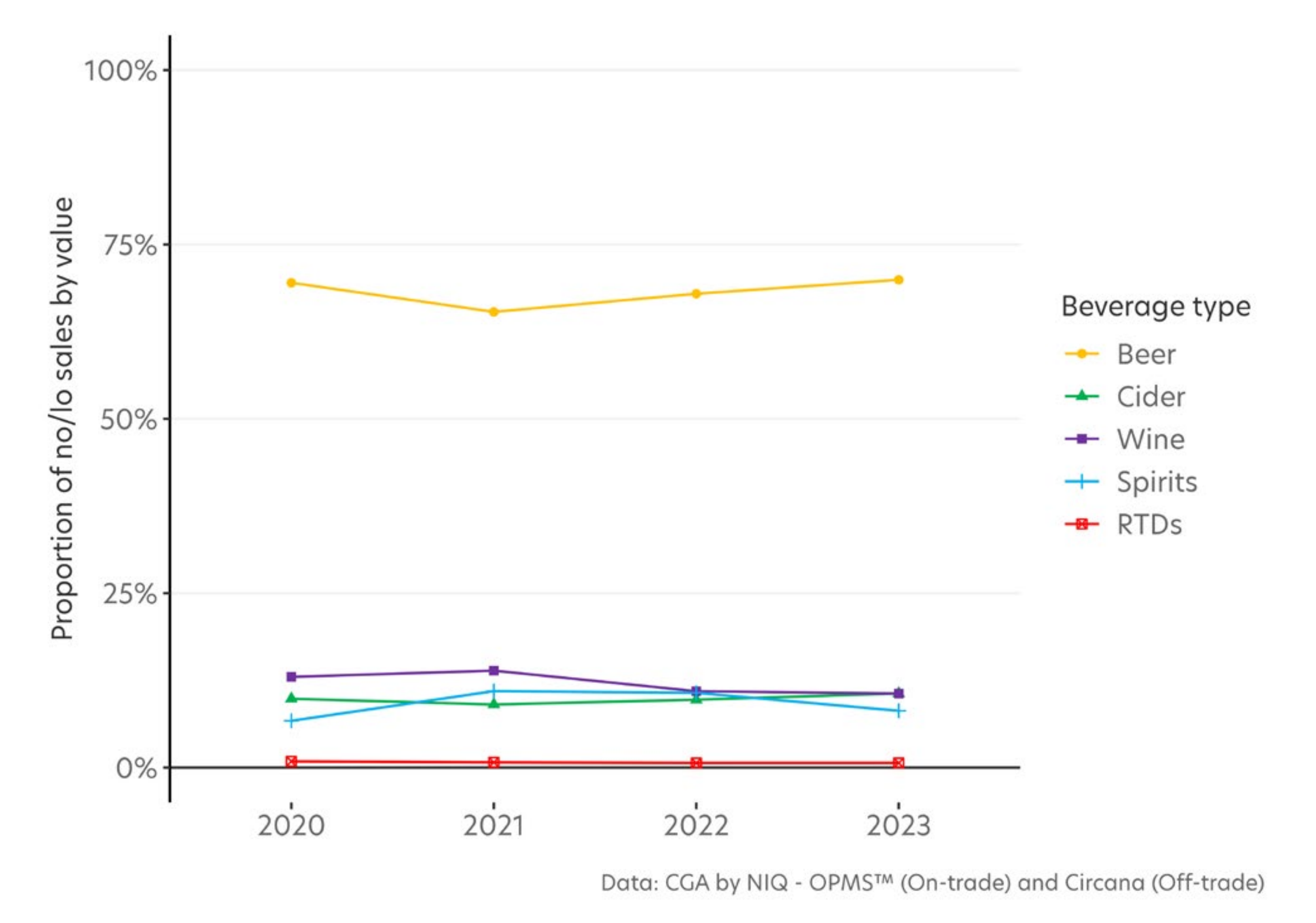

Figure 6. Proportion of no/lo drink sales value accounted for by beverage types (on- and off-trade combined).

Trends in sales volume and value over time

Overall, no/lo drinks sales increased rapidly on all measures between 2020 and 2023. The total volume of no/lo drinks sales increased by 66% since 2020 and the value of those sales more than doubled, with an increase of 126% (Figures 7 and 8).

The proportion of all alcoholic drinks sales accounted for by no/lo drinks also continued to increase, rising from 0.9% of sales volume in 2020 to 1.4% in 2023, an increase of 59% (Figure 3). This includes an increase of 50% for no/lo beer, 57% for no/lo cider, 96% for no/lo wine, 192% (almost threefold) for no/lo spirits and 20% for the smaller category of no/lo RTDs (Figure 5).

In the most recent year, although overall no/lo drinks sales continued to increase in volume and value, this was not seen across all beverages. Although the volume and value of no/lo beer, cider and wine sold all increased between 2022 and 2023, the volume of no/lo spirits sold decreased by 10% (Figure 9) and the value of those sales decreased by 3% (Figure 10). This particularly reflects a fall in no/lo spirits sales in the off-trade.

"The total volume of no/lo drinks sales increased by 66% since 2020."

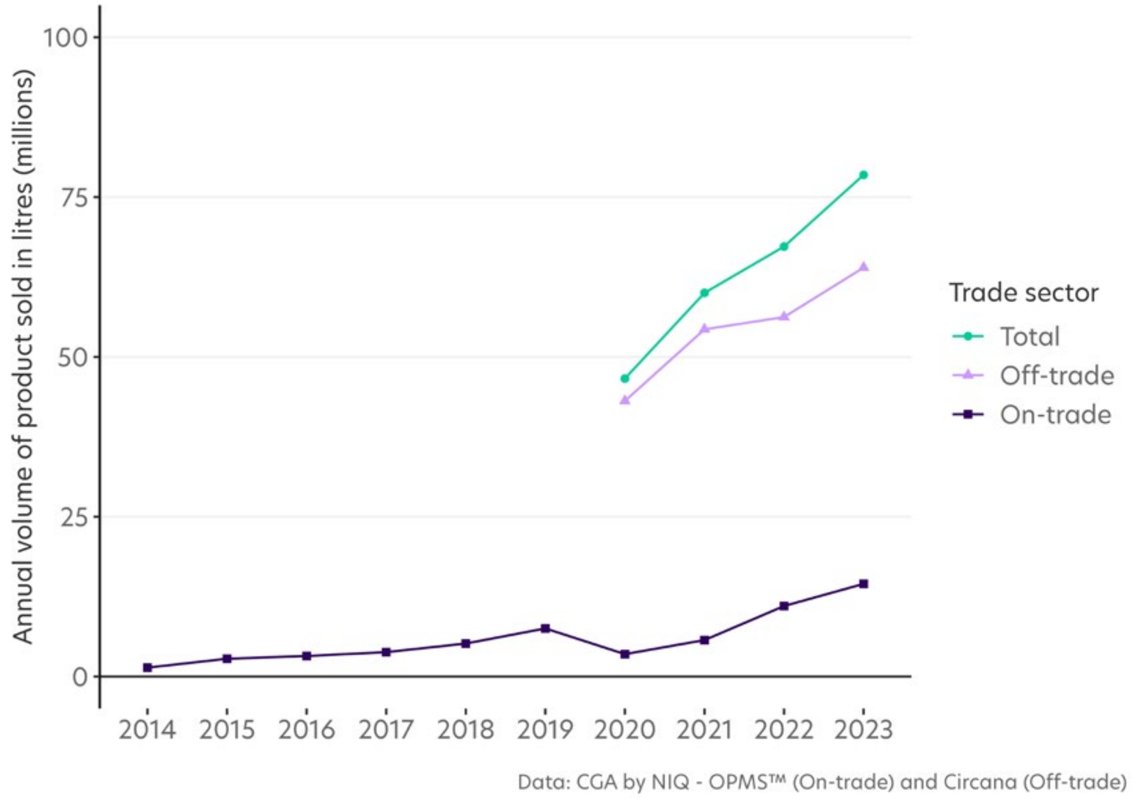

Figure 7. Annual volume of no/lo product sold by trade sector.

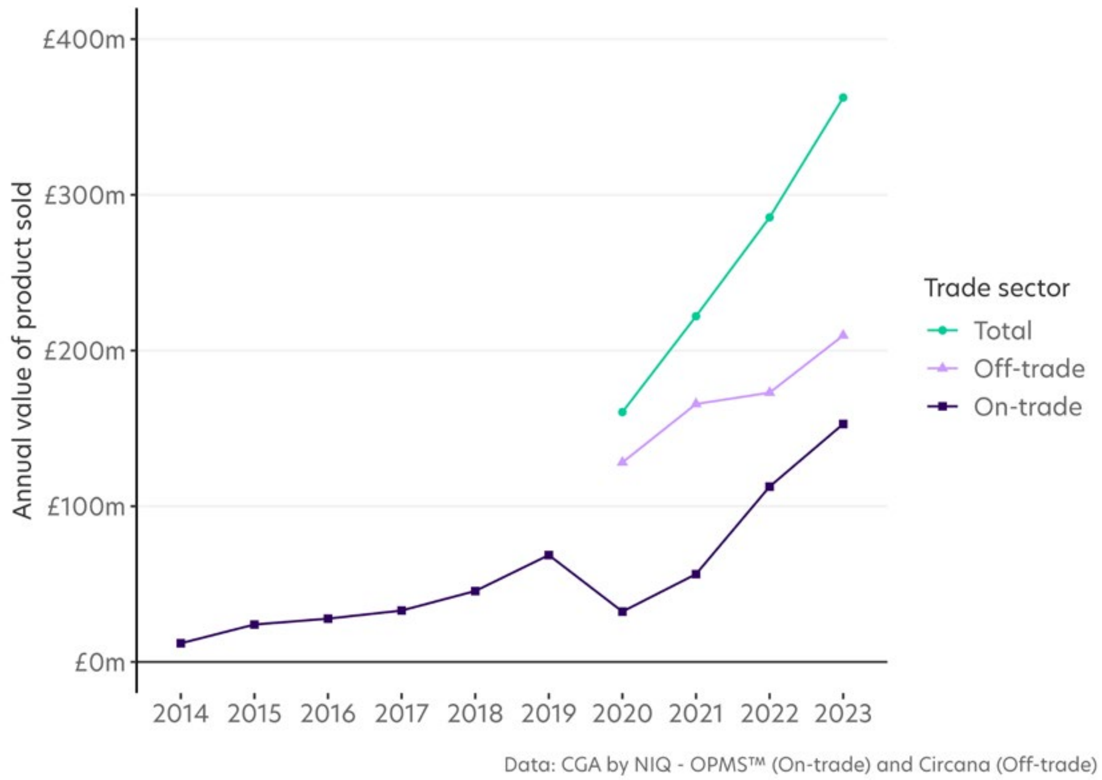

Figure 8. Annual value of no/lo product sold by trade sector.

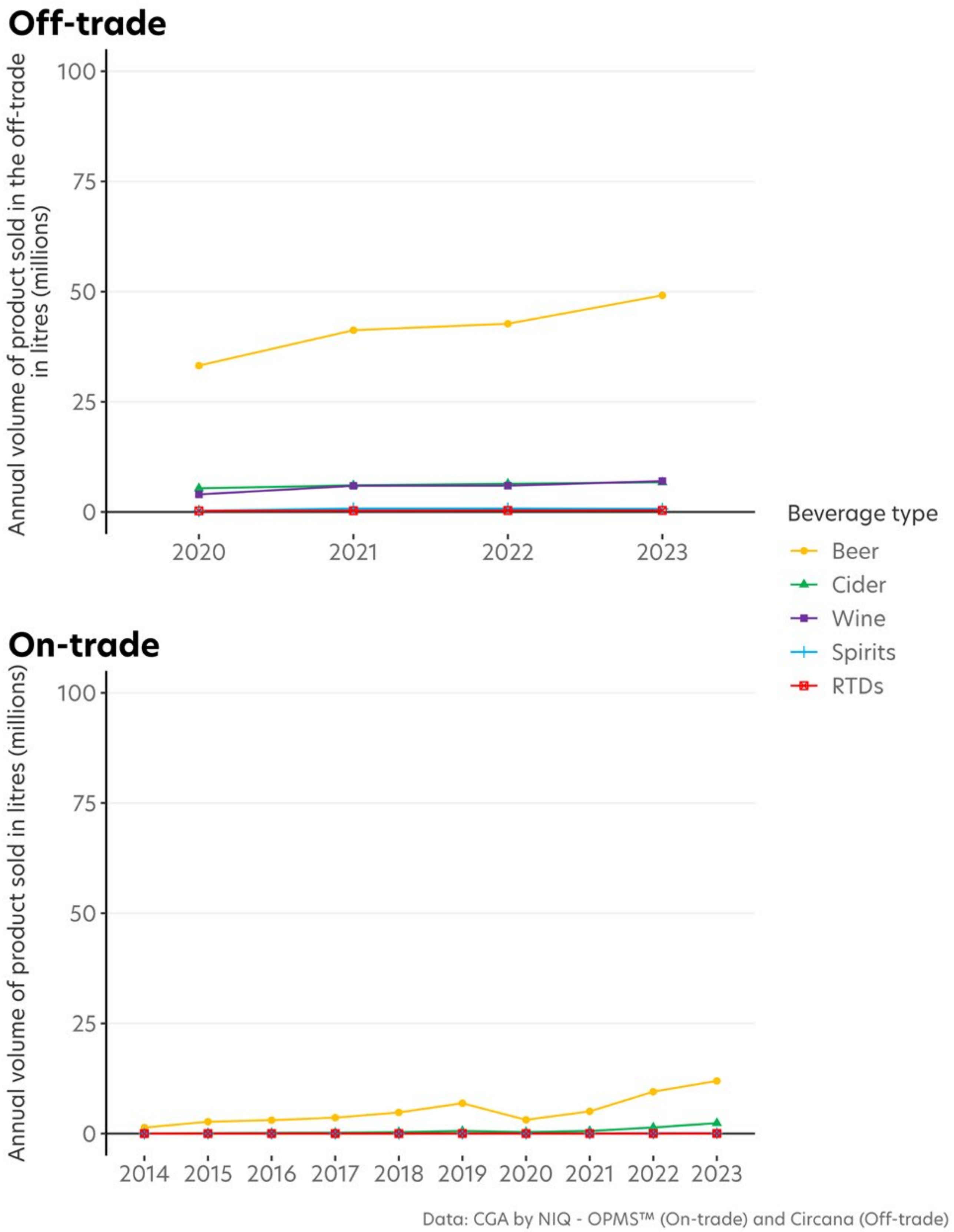

Figure 9. Annual volume of no/lo product sold by beverage type (on- and off-trade combined).

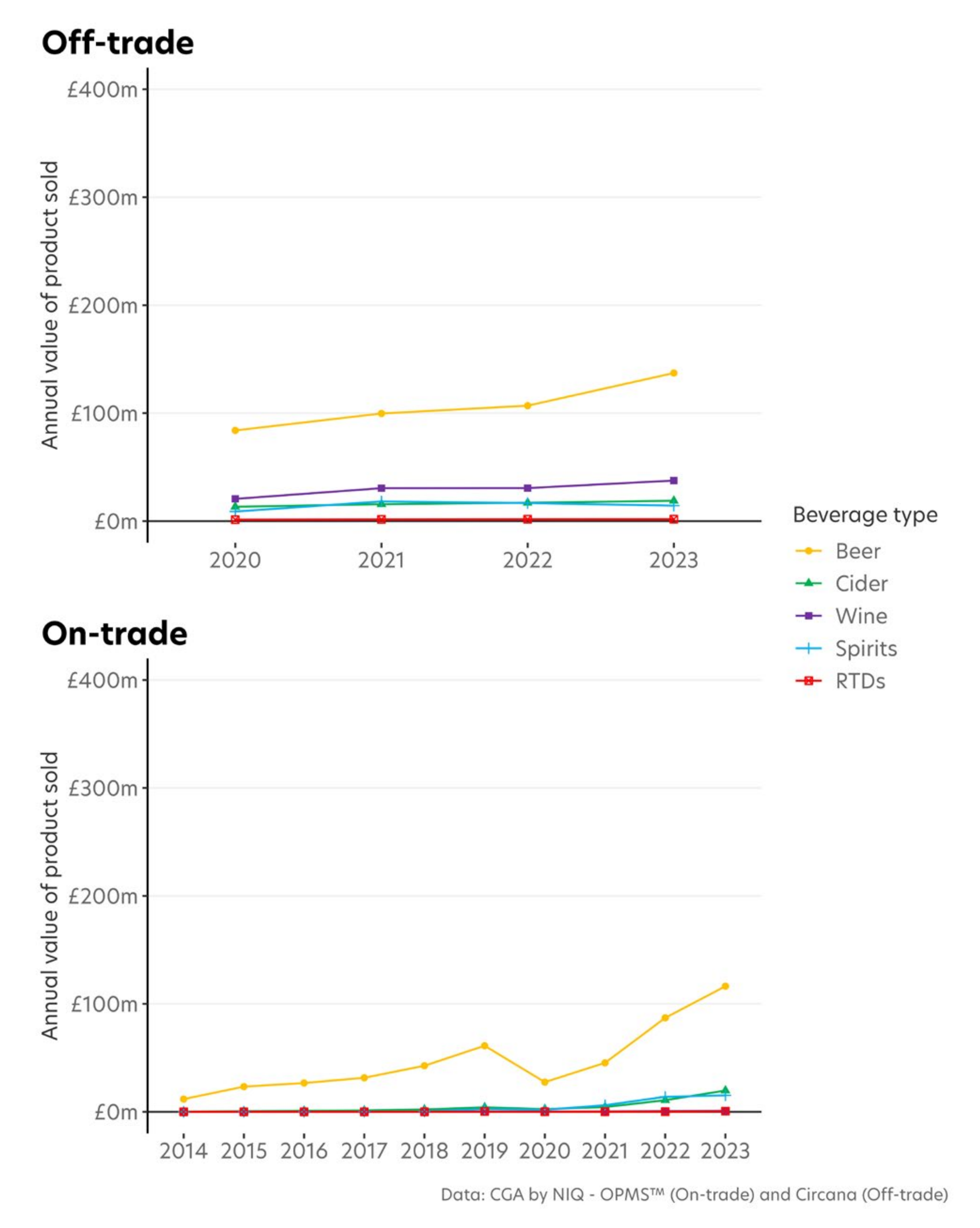

Figure 10. Annual value of no/lo product sold by beverage type (on- and off-trade combined).

Alcohol-free and low-alcohol drink prices

Data on no/lo 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. All pricing data are converted to 2023 prices to facilitate real-terms comparison over time, with other years adjusted for inflation using the Consumer Price Index with Housing costs (CPIH).

The average price of no/lo drinks decreased in real-terms in the off-trade between 2020 and 2023 (Figure 11). In the off-trade, the average price per litre fell from £2.99 to £2.79 for no/lo beer, from £2.63 to £2.54 for no/lo cider, from £6.09 to £5.35 for no/lo wine and from £38.20 to £20.34 for no/lo spirits[1]. However, the real-terms price of no/lo beer did increase by £0.12 or 4% between 2022 and 2023 while the price of other beverages continued to fall.

There were similar trends in the on-trade (Figure 12). For example, the average price per litre of no/lo beer decreased in real-terms from £8.07 to £7.78 between 2020 and 2023 (and fell by £0.04 or 0.4% between 2022 and 2023). The smaller number of products sold in the on-trade means trends for other beverages are less meaningful as newly introduced products can have a large effect on average prices.

The overall decline in prices means some no/lo drinks were cheaper on average than standard alcoholic drinks, but this varied across beverages and between the off-trade and on-trade. The average price paid per litre for no/lo beer in 2023 remained 5% higher than for standard beer in the off-trade and 25% higher in the on-trade.

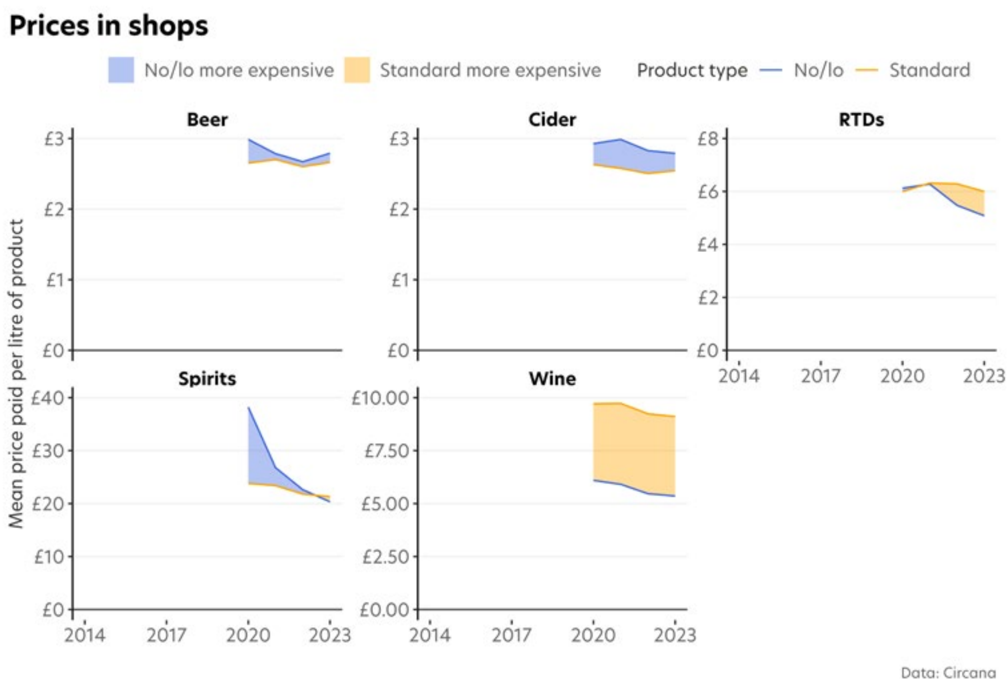

Figure 11. Mean price paid per litre of product in the off-trade for standard and no/lo drinks by beverage type.

1 This large change for spirits arose from the launch of new and lower cost products that are now market leaders.

In both cases, this was a small increase in the price difference since 2022.

On the same measure, no/lo cider was 10% more expensive than standard cider in the off-trade and 9% more expensive in the on-trade. In contrast, the average price paid for no/lo wine was 41% lower than for standard wine in the off-trade and 23% lower in the on-trade. Similarly, the average price paid was 5% lower for no/lo spirits and 15% lower for no/lo RTDs in the off-trade, although both beverages were more expensive than their standard equivalents in the on-trade.

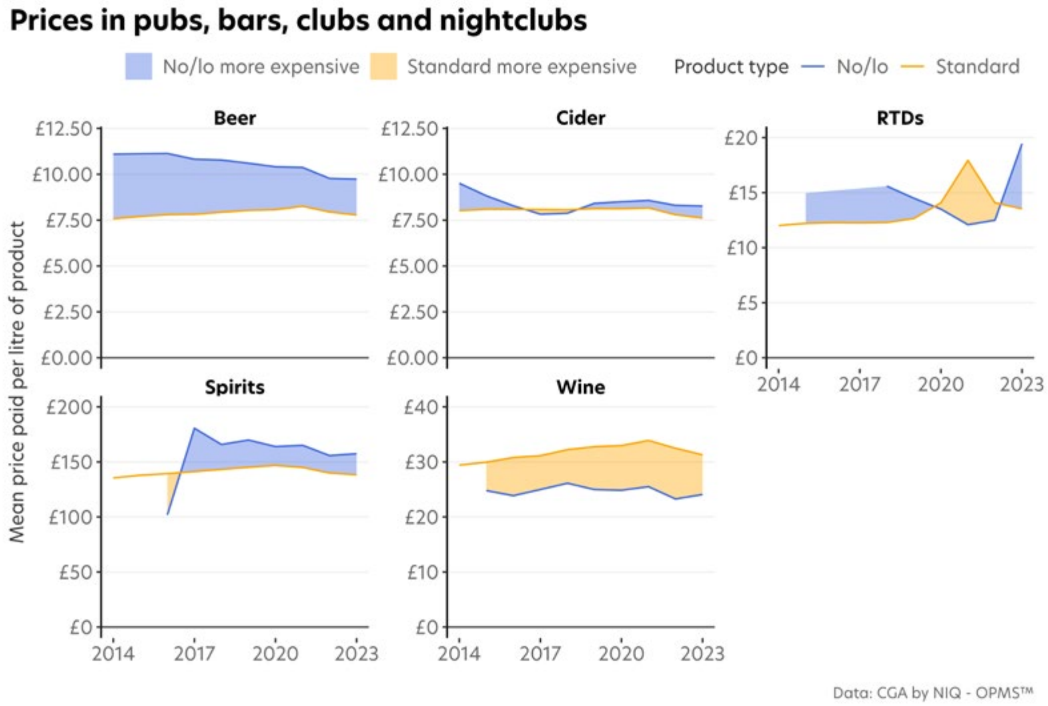

Figure 12. Mean price paid per litre of product in the on-trade for standard and no/lo drinks by beverage type.

Alcohol-free and low-alcohol products and availability

Number of products

The number of different no/lo products sold generally increased over time, although there were signs this growth was stalling.

There were 445 different no/lo Stock Keeping Units (SKUs) sold in the off-trade in 2023, up from 292 in 2020. These products comprised 209 beers, 29 ciders, 139 wines, 47 spirits and 21 RTDs (Figure 13). However, there were slightly fewer no/lo beer, cider, spirit and RTD SKUs sold in 2023 than in 2022, although the number of wines did increase.

The picture was different in the on-trade where there were 206 SKUs in 2023, up from 128 in 2020. This comprised 104 beers, 18 ciders, 17 wines, 62 spirits and 5 RTDs (Figure 14). Although the number of ciders and RTDs remained unchanged between 2022 and 2023, and the number of wines decreased, the number of beers and particularly spirits increased.

Alcohol-free vs. low-alcohol products

In the off-trade, the proportion of litres of product sold that are alcohol-free (i.e. ≤0.05% ABV) rather than low-alcohol (i.e. >0.05% and ≤1.2% ABV) has increased slightly over time, rising from 80% in 2020 to 83% in 2023 (Figure 15). Broadly, the same pattern is seen across all no/lo beverage types with 80-90% of litres of product sold being alcohol-free with little change over time. The exceptions are the no/lo spirits market, where the proportion of litres of product sold that are alcohol-free decreased from 91% in 2020 to 80% in 2023,

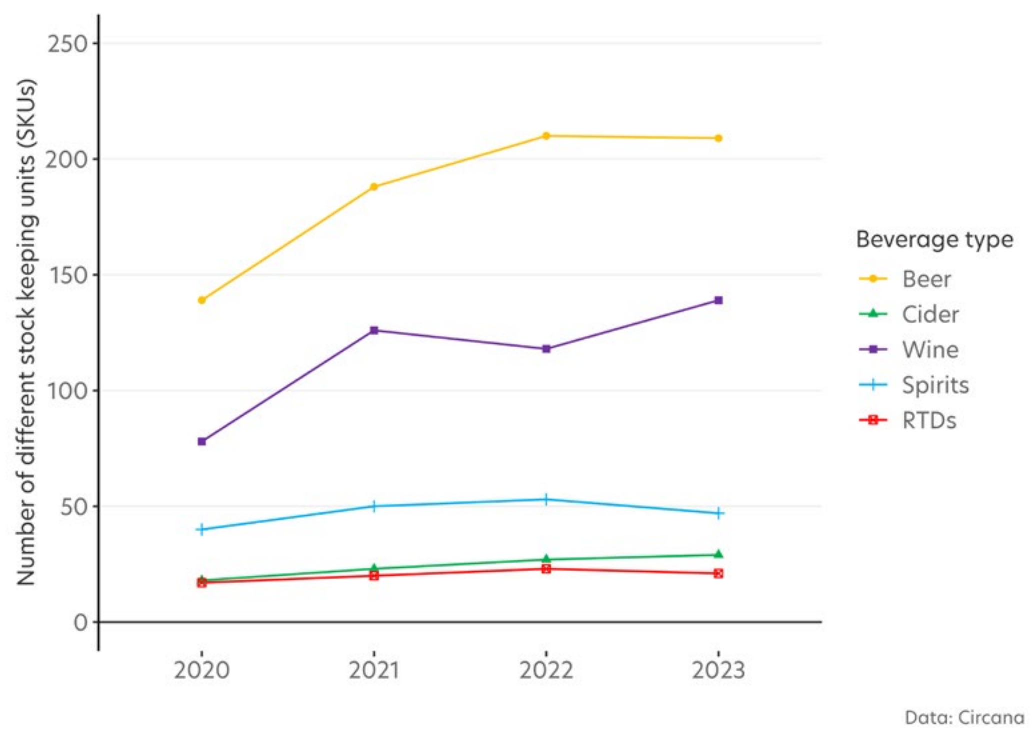

Figure 13. Number of different no/lo product lines sold in the off-trade by beverage type.

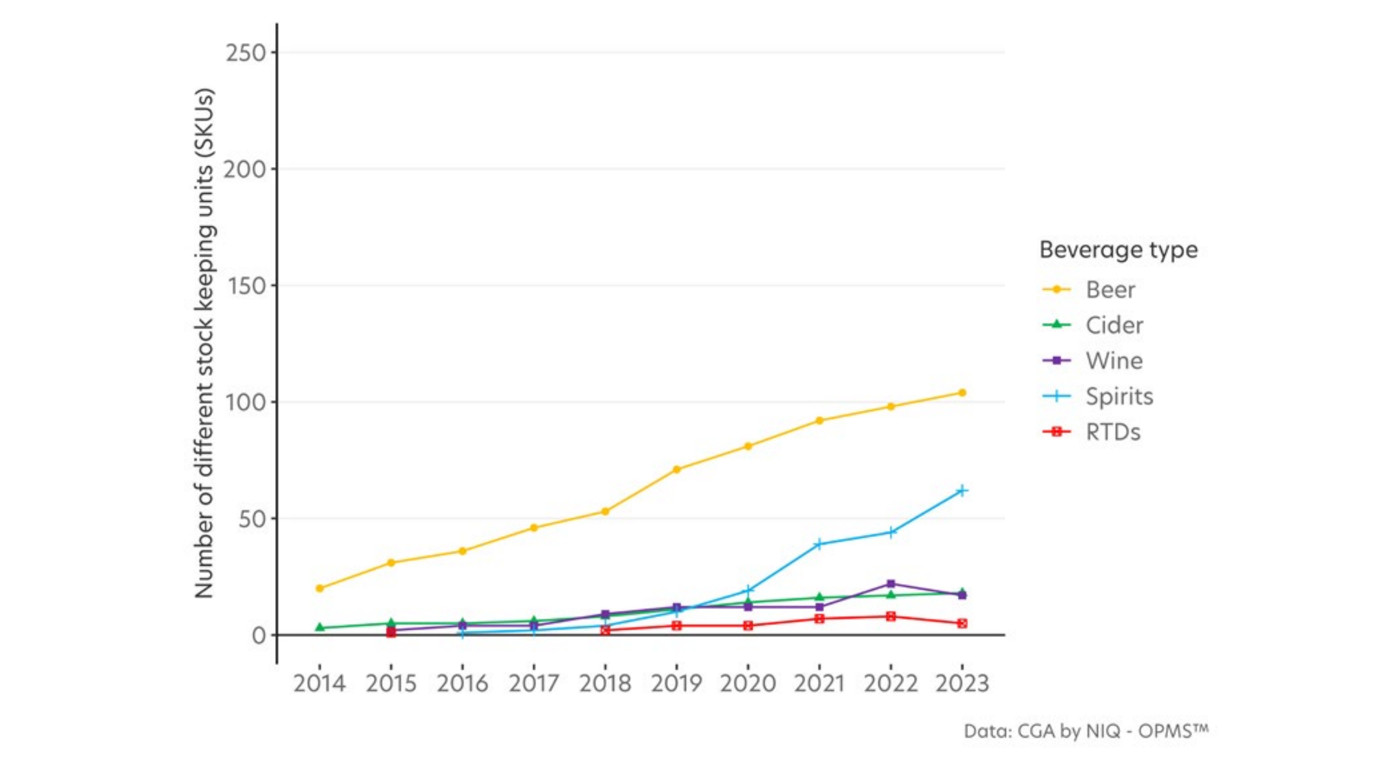

Figure 14. Number of different no/lo product lines sold in the on-trade by beverage type.

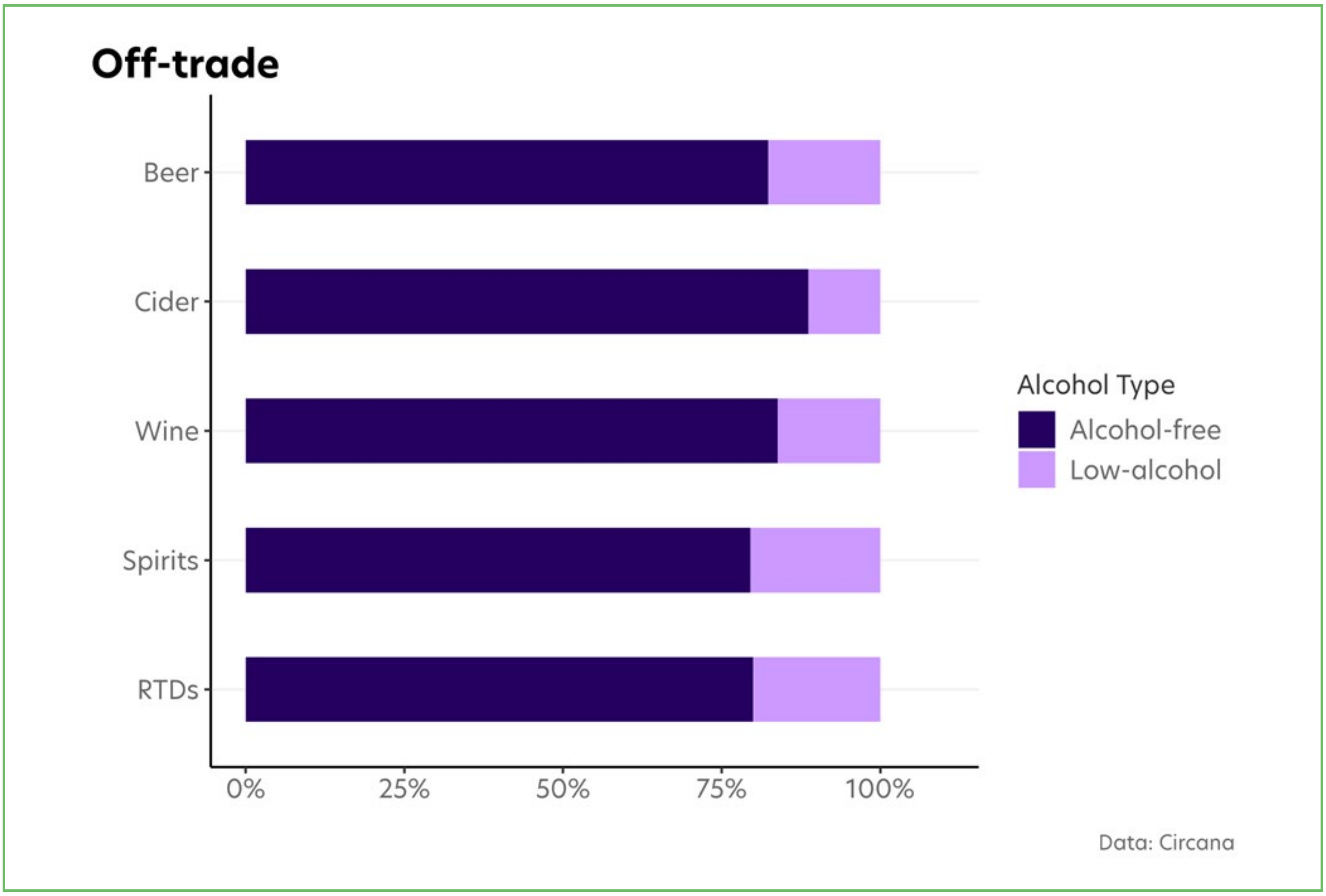

Figure 15. Proportion of products which are alcohol-free (up to 0.05% ABV) or low-alcohol (>0.05% and up to 1.2% ABV) in the off-trade by beverage type in the last year.

and no/lo RTDs where the trend is volatile due to the small number of products available.

In the on-trade, the proportion of litres of product sold that are alcohol-free remained at approximately 78% from 2018 onwards, with similar proportions and stable trend for no/lo beer and no/lo cider (Figure 16). However, 93% of no/lo wine and 94% of litres of product sold of no/lo spirits in the on-trade were alcohol-free in 2023 after sharp increases over recent years. As with the off-trade, the figures for the smaller no/lo RTDs market were more volatile.

Best-selling products

The no/lo drinks market continues to be dominated by a small number of products, with only modest signs that other products are gaining market share and reducing this dominance.

In the off-trade, the three best-selling no/lo beer products accounted for 49% of all no/lo beer sales, while the top ten products accounted for 77% of sales. Although the share accounted for by the top ten products is down from 85% in 2020, it remained unchanged since 2022.

The five best-selling no/lo cider products accounted for 89% of all no/lo cider sales and the top ten products accounted for 99% of all sales. The three best-selling spirits products accounted for 76% of sales and the top ten products accounted for 94% of sales.

In the on-trade, three products accounted for 54% of all no/lo beer sales and the ten best-selling products accounted for more than 83% of sales. Similarly, the three top-selling products accounted for 81% of no/lo cider sales and 50% of no/lo spirits sales.

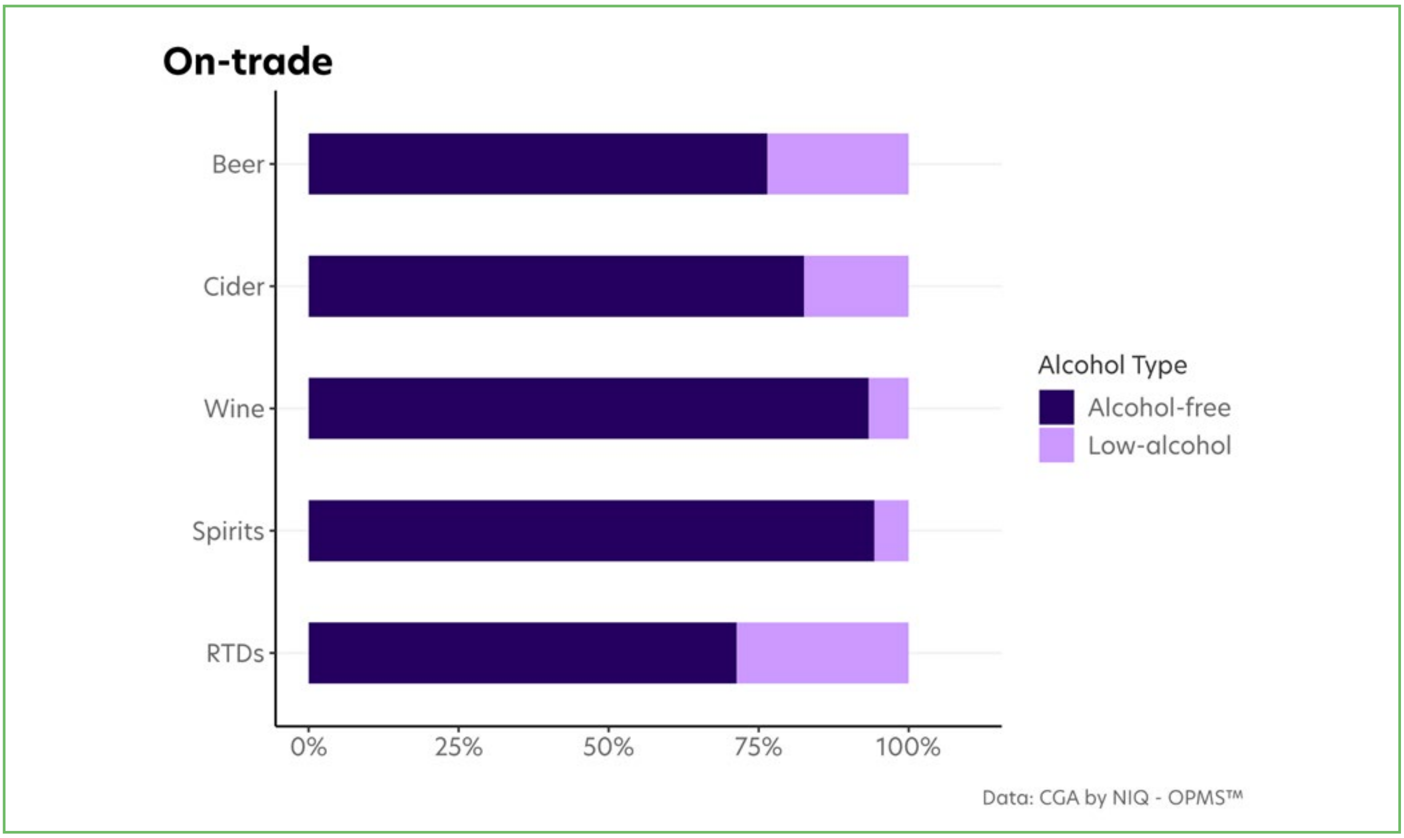

Figure 16. Proportion of products which are alcohol-free (up to 0.05% ABV) or low-alcohol (>0.05% and up to 1.2% ABV) in the on-trade by beverage type in the last year.

Products with a standard alcoholic drink parent brand

No/lo sales continued to largely come from products that have a parent brand that is used for a standard alcoholic drink, such as Heineken for Heineken 0.0 or Gordon's for Gordon's 0.0 (Figure 17).

Among the 100 best-selling no/lo products by volume within each beverage type in the off-trade, 84% of sales came from products that have a standard alcoholic parent brand. This included 89% of beer sales, 100% of cider sales, 71% of spirits sales and 97% of RTDs sales. In contrast, only 40% of sales for the best-selling no/lo wines came from products with a standard alcoholic parent-brand.

These figures showed some evidence of change compared to previous years. The overall volume of off-trade no/lo sales that came from products with a standard alcoholic parent brand was down from 89% in 2022 to 84% in 2023. Similarly, the proportion of no/lo beer sales that came from products with a standard alcoholic parent brand was down from 95% in 2022 to 89% in 2023.

There was less evidence of change in cider, wine or spirits.

The proportion of no/lo RTDs sales that came from products with a standard alcoholic parent brand increased, although this market remains small and subject to large changes from new products.

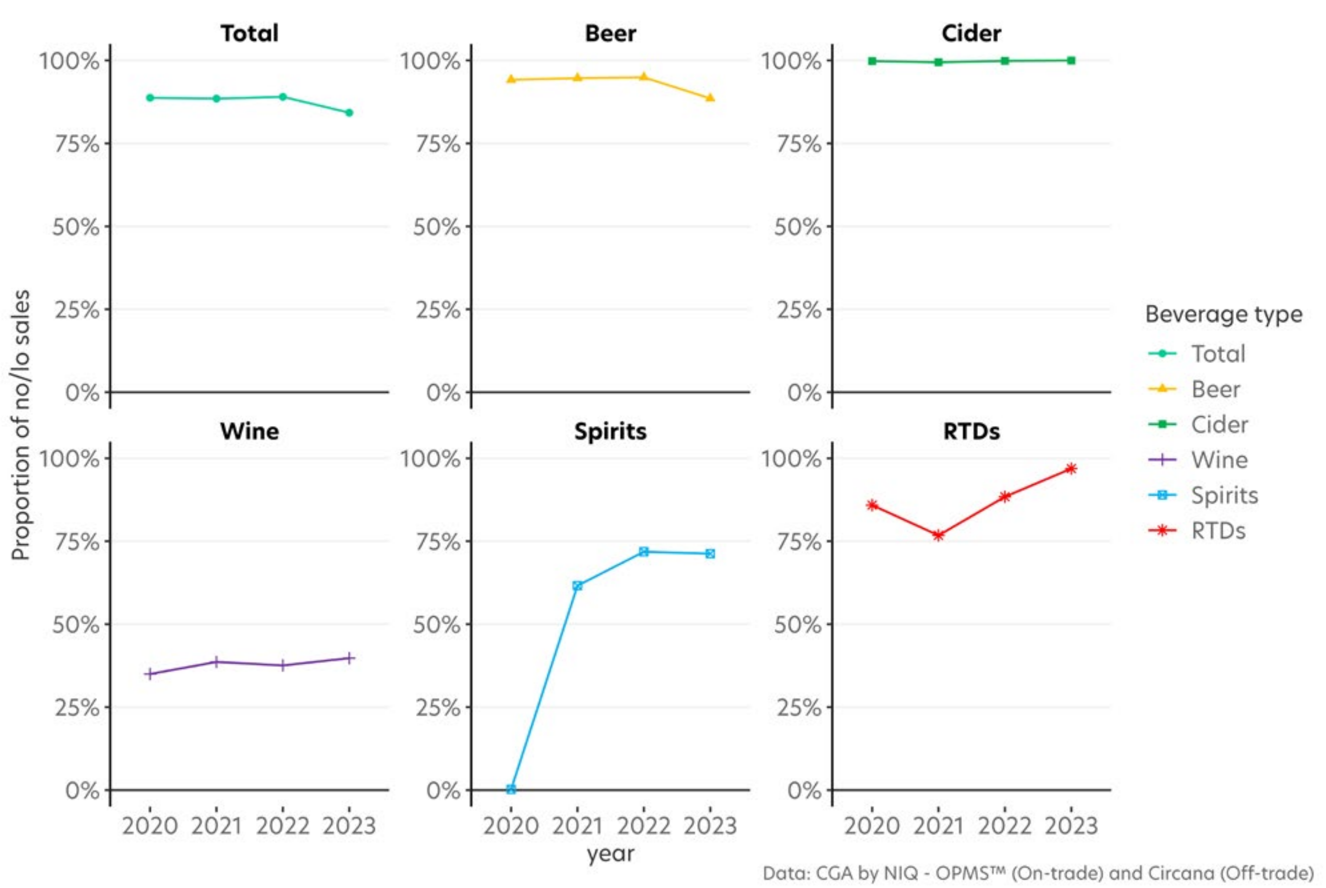

Figure 17. Proportion of no/lo sales volume that comes from products with a standard alcoholic drink parent brand.

Availability of alcohol-free and low-alcohol products in the on-trade

The proportion of on-trade outlets (e.g. bars, pubs, restaurants, nightclubs) that sold no/lo beer products was 74% in 2023, up from 69% in 2019 and 45% in 2014 (Figure 18). Most of this availability was as packaged beer (i.e. bottles or cans), with 74% of outlets selling packaged no/lo beer and only 5% selling it on draught, up from 4% in 2022.

Availability of other beverages was lower with 31% of outlets selling no/lo cider (up from 25% since 2022), 20% selling no/lo spirits (up from 17%), and less than 2% selling no/lo wine or RTDs.

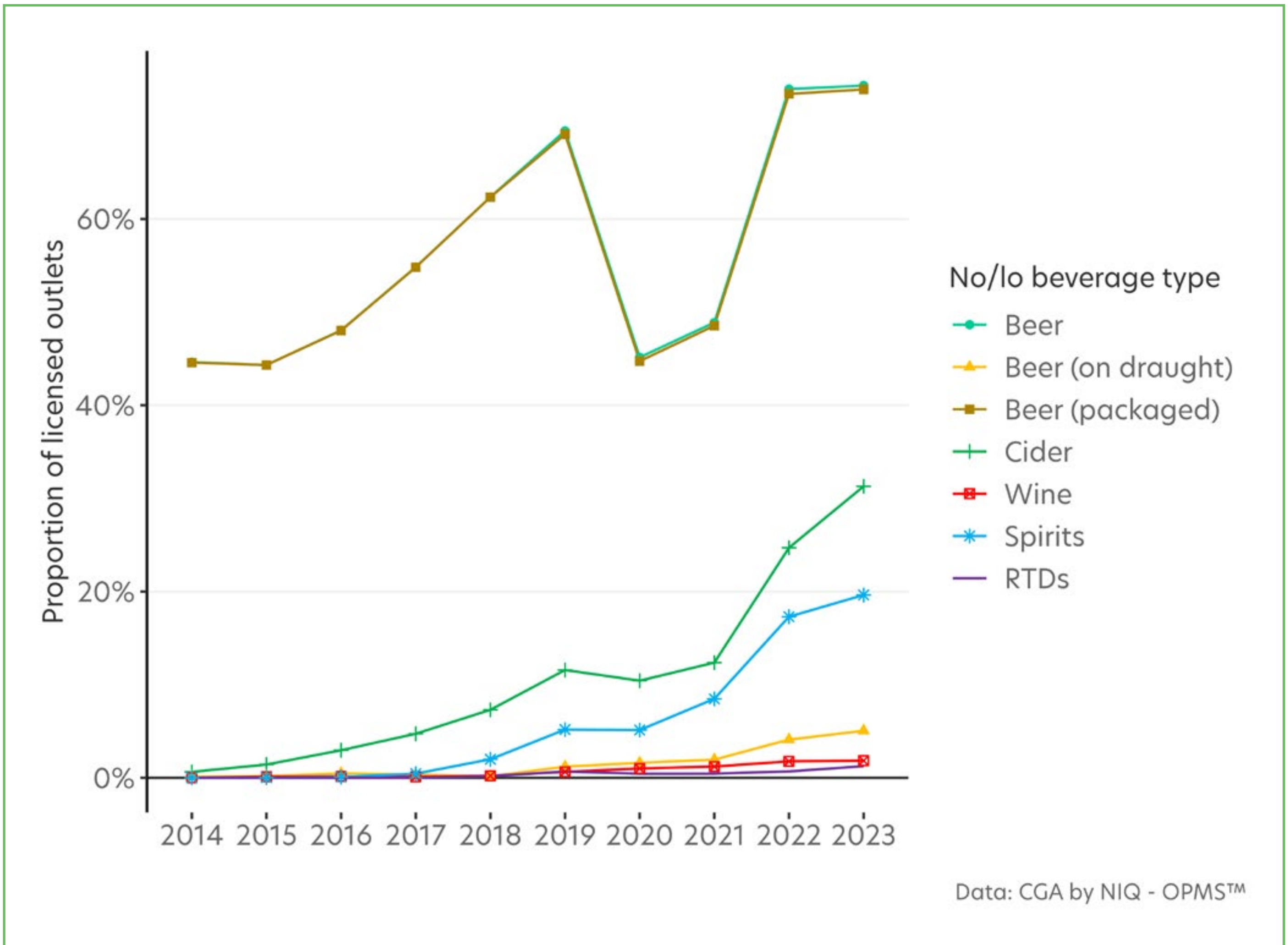

Figure 18. Proportion of on-trade outlets selling no/lo products by beverage type.

Consumption of alcohol-free 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 of 2022 and then February, April, August and October of 2023 and 2024.

One-third (31%) of adults in Great Britain said they consumed no/lo drinks at least once a year in 2024, with 18% doing so at least once a month and 9% doing so at least once a week (Figure 19). There was little difference in how often people consumed no/lo drinks between the off-trade and on-trade, with approximately 20% doing so at least once a year and approximately 10% doing so at least once a month in both cases. There has been little change in the proportion of adults consuming no/lo drinks at any frequency or in any trade sector since 2022.

There was a small age gradient in the frequency of consuming no/lo drinks in 2024, with older age groups more likely to do so and particularly to do so at least weekly (Figure 20). While 26% of 18-24 year-olds consumed no/lo drinks at least once a year, between 30% and 33% did so in other age groups. Similarly, while 5% of 18-24 year-olds consumed no/lo drinks at least once a week, this percentage generally increased with age to reach 13% among those aged 65+. Although there was some evidence that 18-24 year-olds became less likely to consume no/lo drinks between 2022 and 2024, there were no clear pattern of changes across other age groups.

Those in higher social grades were more likely to consume no/lo drinks and to do so more frequently than those in lower social grades (Figure 21). Almost two in five (39%) of adults

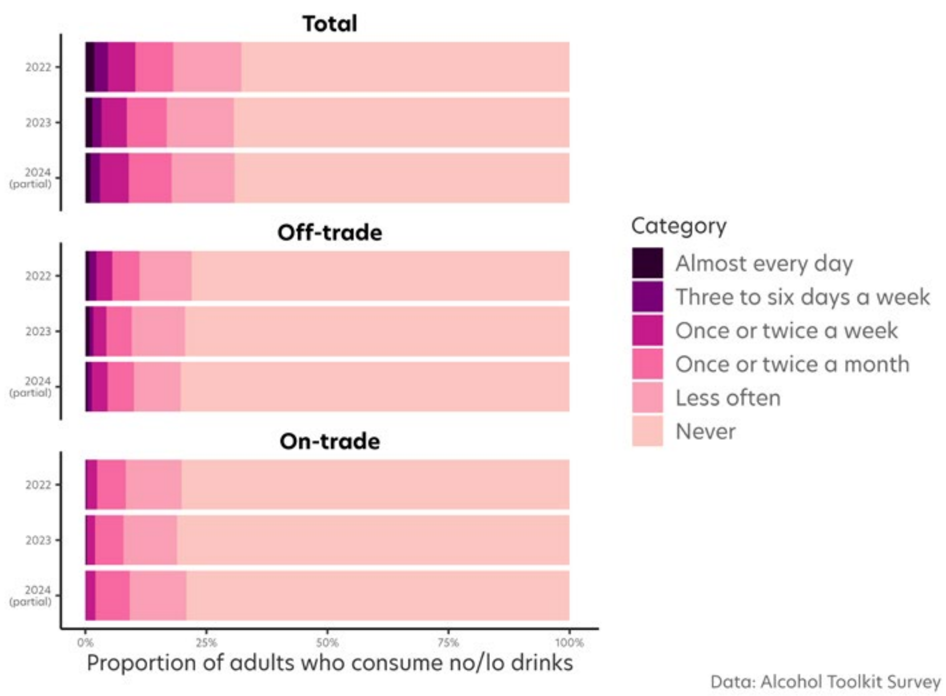

Figure 19. Frequency of no/lo drink consumption among adults by trade sector.

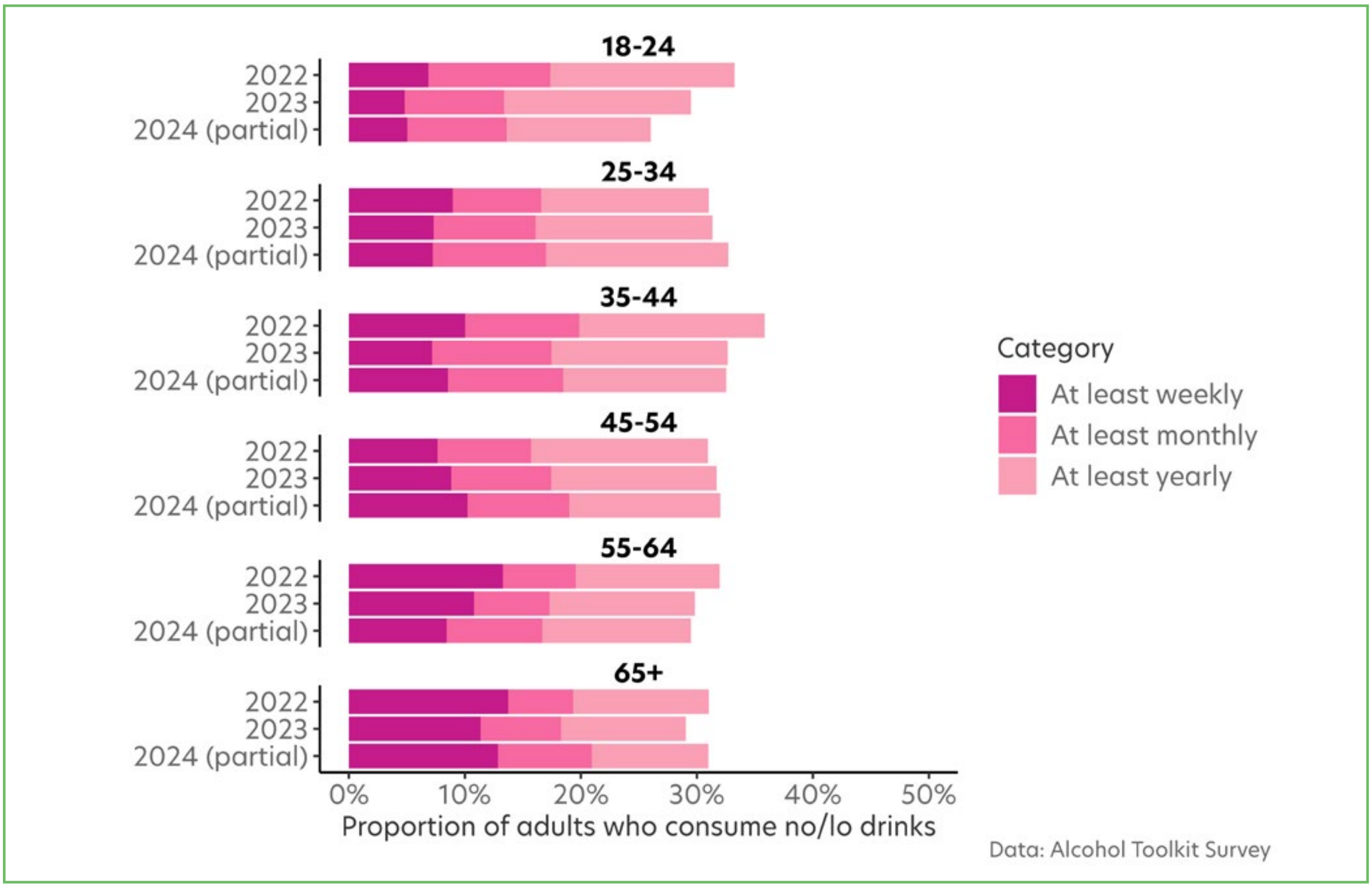

Figure 20. Frequency of no/lo drink consumption among adults by age.

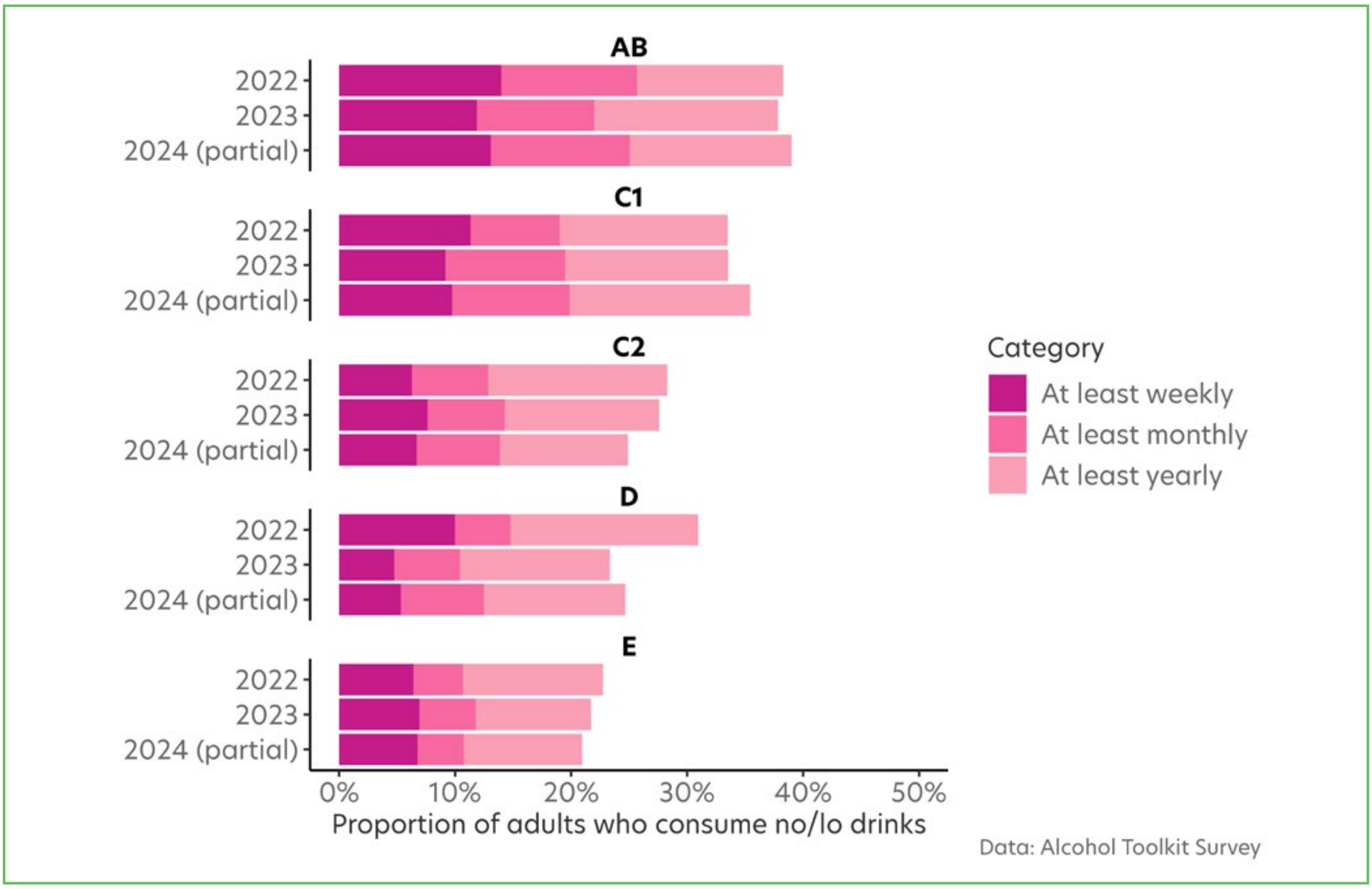

Figure 21. Frequency of no/lo drink consumption among adults by social grade.

in higher and professional occupations (Grade AB) consumed no/lo products in the last year compared to 21% of those in semi-skilled and unskilled manual occupations, unemployed and lowest grade occupations (Grade E).

Similarly, 25% of those in Grade AB and 11% of those in Grade E consumed no/lo products at least once a month and 13% of those in Grade AB and 7% of those in Grade E consumed them at least once a week.

There was some evidence that this difference was increasing over time with those in lower grades becoming less likely to consume no/lo drinks at least once a year between 2022 and 2024. However, there was little evidence of change in consuming no/lo drinks at least once a month or week.

People who consumed standard alcoholic drinks were much more likely to consume no/lo drinks than non-drinkers (Figure 22). Among non-drinkers, 10% had consumed no/lo products in the last year, compared to 38% of low-risk drinkers and 40% of risky drinkers[2]. Similarly, 4% of non-drinkers consumed no/lo drinks at least once a month compared to 21% of low-risk drinkers and 26% of risky drinkers.

There was little difference in the frequency of consuming no/lo drinks between all risky drinkers and risky drinkers who had attempted to reduce their alcohol consumption in the last year. There was also little change over time in the frequencies for all groups.

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

2 Risky drinkers are those with an Alcohol Use Disorders Identification Test Consumption questions (AUDIT-C) score of 5 or more.

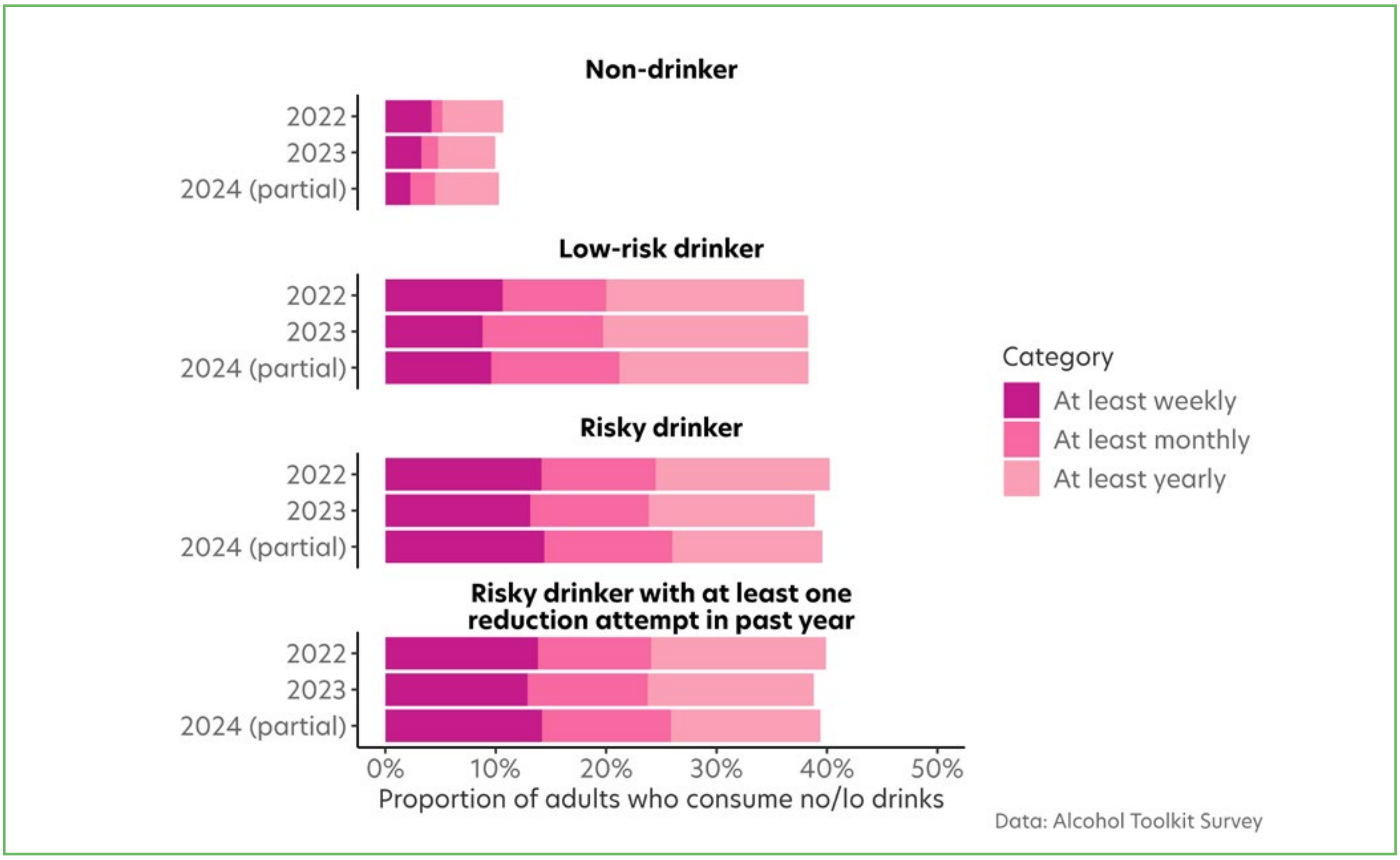

Figure 22. Frequency of no/lo drink consumption among adults by drinker group.

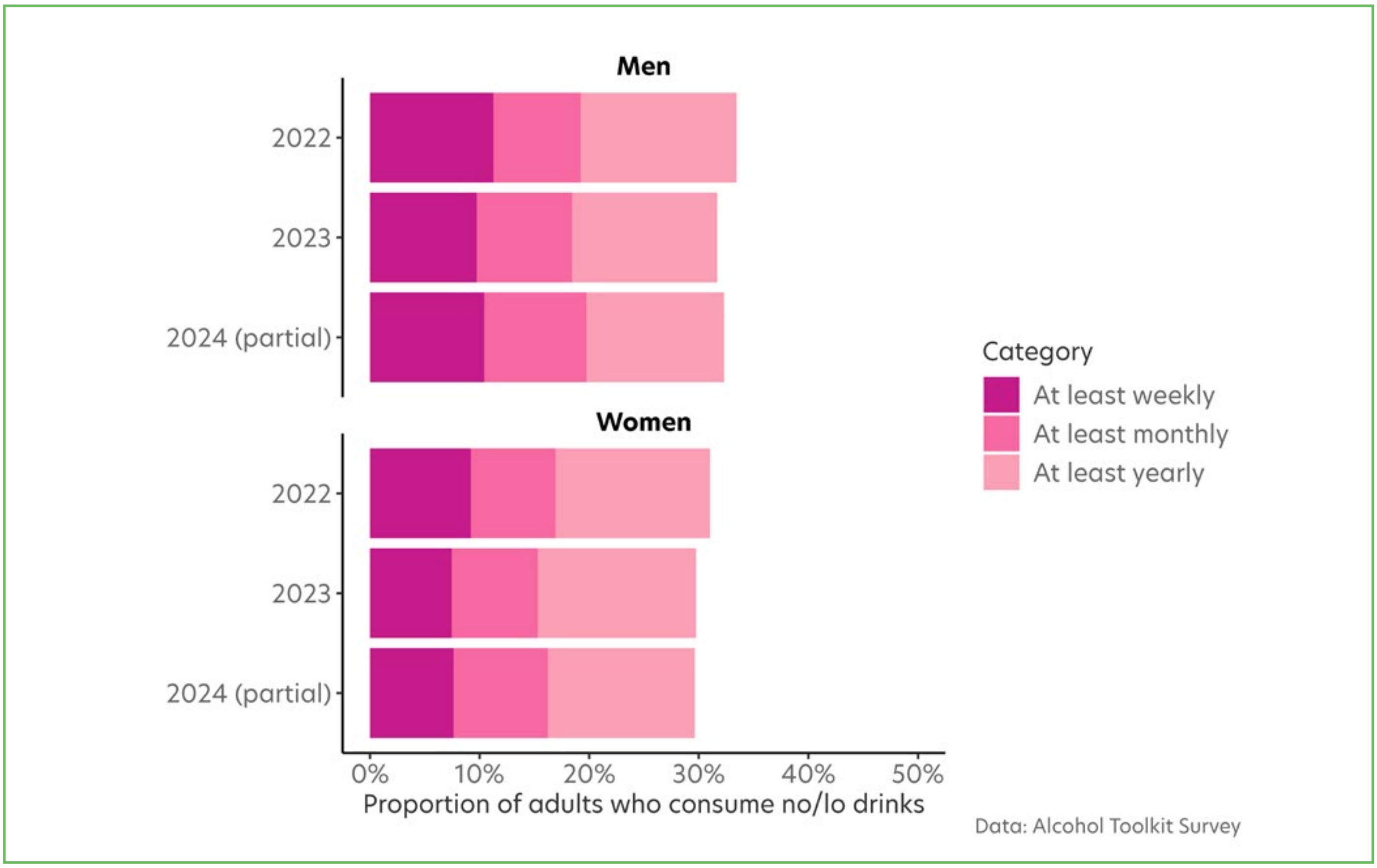

Figure 23. Frequency of no/lo drink consumption among adults by sex.

Household purchasing of alcohol-free and low-alcohol drinks

Data on household purchasing comes from Kantar's Worldpanel Take Home panel and is available from 1st January 2018 to 30th December 2023.

One in five (20%) households bought a no/lo drink in the off-trade in 2023, up from 12% in 2018 (Figure 24). This includes the 13% of households who bought no/lo beer, 5% of households who bought no/lo cider, 7% of households who bought no/lo wine, and less than 2% who bought either no/lo spirits or RTDs.

In contrast, 88% of households bought a standard alcoholic drink in the off-trade in 2023, including the 59% of households who bought beer, 39% who bought cider, 71% who bought wine, 60% who bought spirits and 25% who bought RTDs (Figure 25).

Almost all (96%) households who bought no/lo drinks in the off-trade in 2023 also bought a standard alcoholic drink (Figure 26).

In contrast, only 22% of households who bought a standard alcoholic drink also bought a no/lo drink of the same beverage type.

Although the proportion of households that bought no/lo drinks who also bought standard alcoholic drinks has not changed since 2018, the proportion of households that bought standard alcoholic drinks that also bought no/lo drinks has steadily increased (Figure 27).

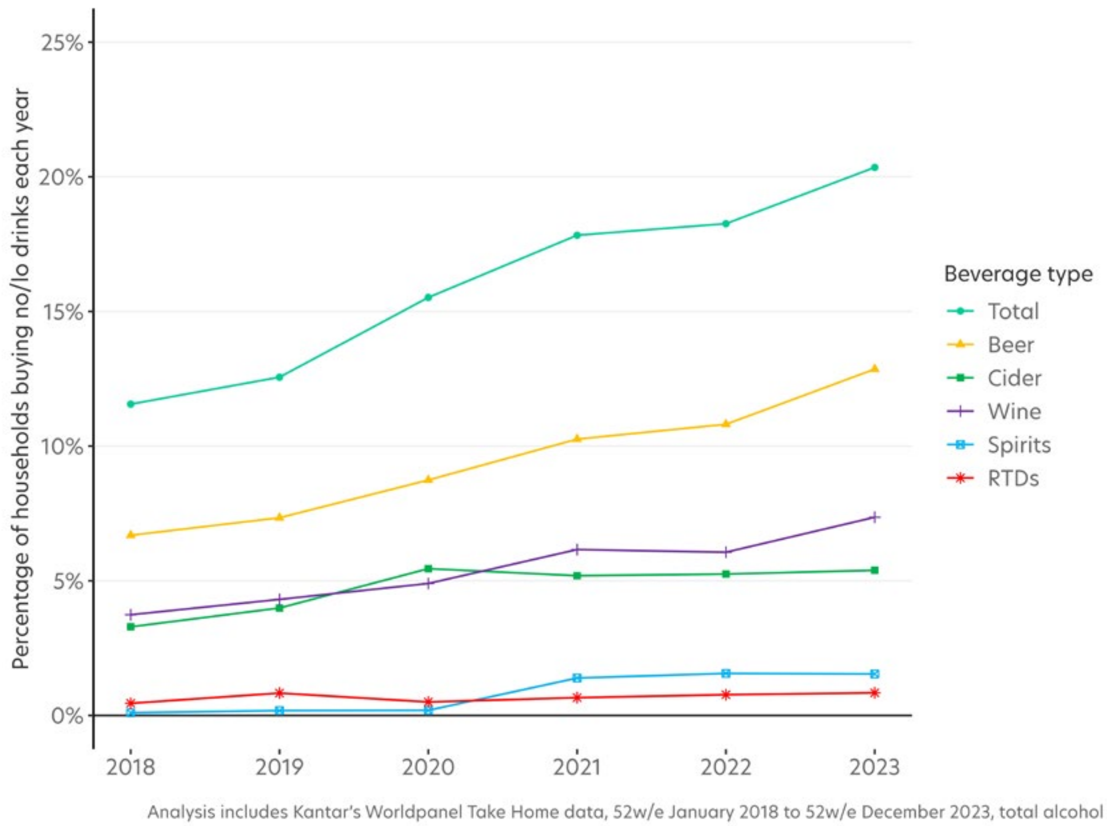

Figure 24. Percentage of households buying no/lo drinks in the off-trade each year by beverage type.

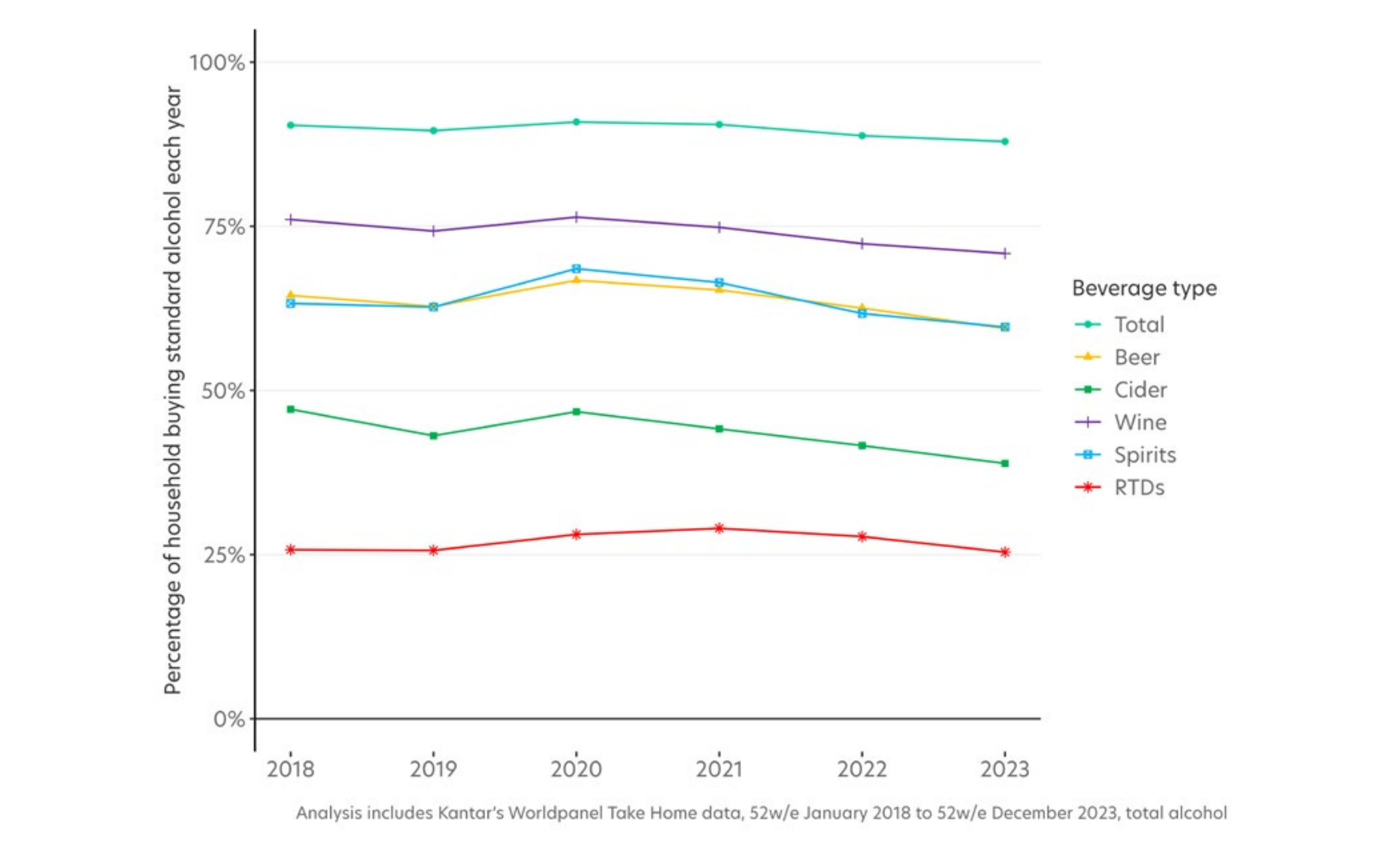

Figure 25. Percentage of households buying standard alcoholic drinks in the off-trade each year by beverage type.

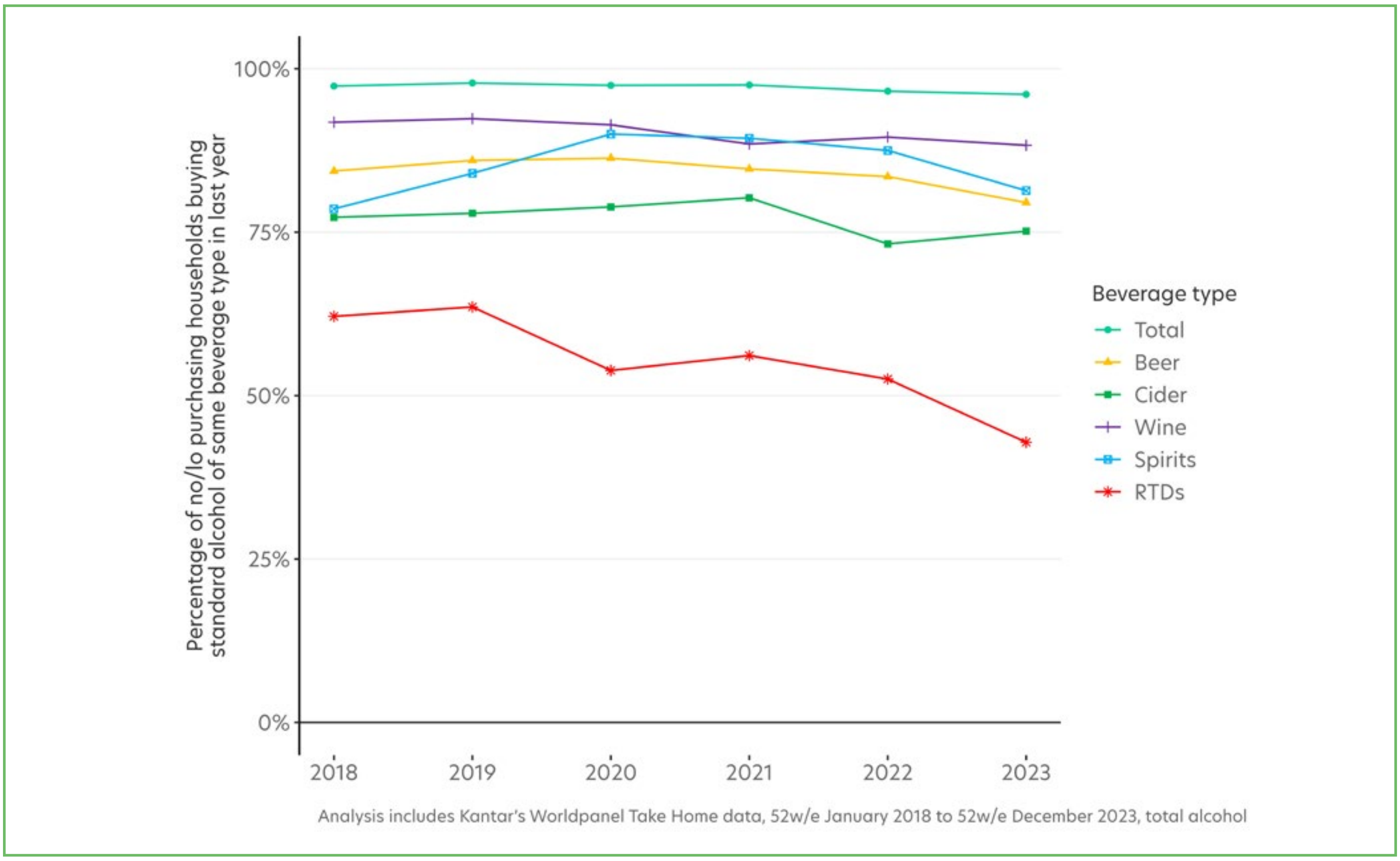

Figure 26. Percentage of no/lo purchasing households buying standard alcohol of the same beverage type in the last year.

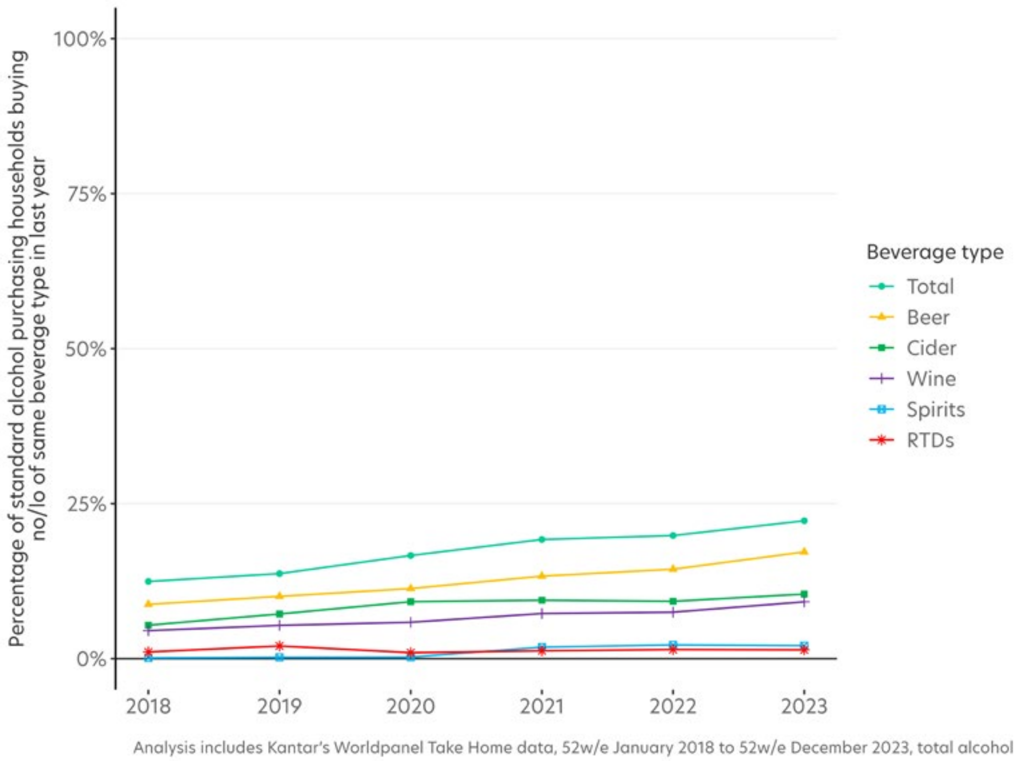

Figure 27. Percentage of standard alcohol purchasing households buying no/lo of the same beverage type in the last year.

Among households that bought no/lo drinks, they did so on an average of 0.05 days per week (or 3 days per year). Households that bought standard alcoholic drinks did so on an average of 0.41 days per week (or 21 days per year). These figures have not changed substantially since 2018.

Households that bought no/lo drinks bought an average of 0.2 litres of no/lo drinks per week and spent an average of £0.54 per week on these. In contrast, households that bought standard alcoholic drinks bought an average of 1.3 litres of standard alcoholic drinks per week and spent an average of £6.82 per week on these.

Although the volume of standard alcoholic drinks bought by households purchasing these drinks has not changed substantially over time[3] and spending has increased by 13% in cash terms[4], households that buy no/lo drinks are buying and spending substantially more. The average weekly volume of no/lo drinks purchased by these households increased by 50% and spending increased by 80% in cash terms between 2018 and 2023.

Among households that buy both no/lo and standard alcoholic drinks, 18% of the volume in litres and 17% of the cost of the average weekly purchase is accounted for by no/lo drinks. For households that buy both no/lo and standard beers, no/lo beers account for 32% of both the volume and cost of all beer purchases. This percentage has risen steadily over time for both overall purchases and beer purchases, as well as for purchases of all other beverages except RTDs.

3 There were changes in alcohol purchasing following the start of the COVID-19 pandemic, but figures eventually returned to previous levels.

4 Cash terms means spending without accounting for inflation.

Appendix A: Methodological information

Circana data on off-trade alcoholic drink sales

Circana 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. Circana 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 Circana and our findings therefore do not apply to this section of the market.

Circana 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 cover the period from 1st January 2020 to 31st December 2023.

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 30th December 2023.

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 a nationally representative sample of 2,450 adults (16+) living in households in Great Britain each month (1,700 in England, 450 in Scotland, 300 in Wales). The analyses here only use data from respondents aged 18+.

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 alcohol-free 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.

Kantar's Worldpanel data on household off-trade alcohol purchasing

Kantar provide data from their World Panel dataset on household purchasing of alcohol in the off-trade. The data come from a continuous household purchasing panel in which a household member scans the barcode of food and drink products brought into the home.

The panel comprises 30,000 households chosen to be representative of all households in Great Britain by region and demographics including household size, presence of children and age of main shopper. Socioeconomic group is not included in the sample targets but is part of the weightings used to ensure the survey population is representative of Great Britain. Population targets (i.e. quotas) for the panel come from the results of the BARB Establishment Survey and the Office for National Statistics (ONS). Kantar replace households that leave the sample on a continuous basis to ensure it remains representative of households in Great Britain.

Households must meet quality standards to be included in the dastaset and these include meeting thresholds informed by household size for data recording and purchasing volume and spend every four weeks. Households also upload digital images of their shopping receipts and Kantar uses these to verify the accuracy of the data. The available data covers the period from 1st January 2018 to 30th December 2023.

For analysis, we divided the data for

each year into periods of four weeks, with each year containing thirteen periods. Only individuals who were present in the sample in all periods of a given year were included. All figures reported from Kantar's Worldpanel Take Home data are calculated using panel weights provided by Kantar.

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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