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Patterns of Consumption at the UK's First "Alcohol-Free Off-Licence": Who Engaged with No- and Low-Alcohol Drinks and Why?

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Abstract

No- and low-alcohol beverages are currently experiencing high sales growth in the UK, but academic research regarding the production, regulation, marketing and consumption of these drinks remains limited. This article presents research findings from ethnographic customer observations and semi-structured staff interviews at Club Soda's temporary "alcohol-free off-licence" in London – the UK's first shop that sold exclusively no- and low-alcohol drinks. I analyse the demographics of who came to the off-licence, and how and why they engaged with no- and low-alcohol drinks. Findings suggest that relatively equal numbers of non-drinkers and current drinkers were customers of the off-licence, but there were differences across gender, ethnicity, and age groups. No- and low-alcohol drinks supported customers' alcohol-free lifestyles or attempts to drink mindfully. However, whether customers were former drinkers, lifelong abstainers or current drinkers influenced what products they sought from the off-licence and shaped how these products were used in (non-)drinking practices. This paper also highlights the role of the off-licence as a stigma-free, sober space where customers could try no- and low-alcohol products, prior to purchase, and find connection with others.

Keywords

Alcohol-free; community; no and low-alcohol drinks; moderation; sobriety

Introduction

Take-home sales of premium and own label no- and low-alcohol beverages grew by £85.1m (48%) in the UK in 2021, creating a product category worth £714m in sales (Brown 2021). This new consumer product segment is rapidly infiltrating mainstream culture. In December 2021 British broadsheet (Moore 2021) and tabloid (Bryant 2021) newspapers discussed no- and low-alcohol drinks suggestions for the festive period. *Heineken 0.0* (an alcohol-free version of *Heineken*) was featured in the most iconic British film of 2021: *No Time to Die* – the latest instalment of the James Bond movie franchise (James Bond 007 2021). 2021 also saw the release of *Sex and the City*'s sequel, *And Just Like That*, which used alcohol-free wine in promotion material, decades after it positioned women's drinking as a symbol of female empowerment and success (McLaren 2021). These cultural trends could be reflective of declining alcohol

consumption in the UK (Institute of Alcohol Studies 2021; Office for National Statistics 2017). It could also be driven by the international trend towards teetotalism amongst young people in Western cultures (Pape et al. 2018; Vashishtha et al. 2020), partially because of greater awareness regarding the physical and mental health impacts of alcohol (Caluzzi et al. 2021; Törrönen et al. 2021).

Despite this growing demand for, and awareness of, no- and low-alcohol drinks, there remains limited academic research regarding this category and its impact on (non-)drinking behaviours. Two scoping reviews of existing literature demonstrate the requirement for more research and render a complicated and mixed picture regarding current understanding of no- and low-alcohol sales trends, drivers for consumption, and marketing strategies (Anderson et al. 2021a; Miller et al. 2021). Anderson et al. further emphasise that there is inadequate evidence regarding the impact of this product category on personal and public health, which is currently “very limited and needs considerable expansion” (2021a).

Club Soda, a “mindful drinking movement” that “helps people drink more mindfully and live well”, partnered with Fifty.io (“a technology company focused on large scale analysis of social media data”) to explore social media engagement with no- and low-alcohol drinks brands (Club Soda and Fifty.io 2021). Their findings concur with a report published by The Social Market Foundation (Corfe et al. 2020), which found that no- and low-alcohol drinks may be a millennial phenomenon. Furthermore, it has been suggested that men are more likely to consume these alternatives compared to women and are most likely to do so in situations when drinking a stronger ABV% would be inappropriate, i.e., prior to driving or exercise (Corfe et al. 2020).

Two quantitative studies have shown that those with higher incomes and socio-economic advantages are most likely to consume no- and low-alcohol drinks (Anderson et al. 2021b; Corfe et al. 2020). However, Anderson et al. contend that this is because those of higher income consume higher volumes of alcohol, and thus no- and low-alcohol products are used for “additional” consumption. This suggests that no- and low-alcohol drinks are not used as a tool to moderate alcohol consumption or to maintain abstinence. However, a more mixed picture is reflected in a recent, qualitative study by Nicholls (2022). While she concedes that social class is a factor in consumption, her participants reflected a balance between “exclusive consumption of NoLos” and “hybrid consumption” of both alcoholic and no- and low-alcohol drinks (Nicholls 2022, 6). As such, more research is needed to understand how no- and low-alcohol products are consumed within (non-)drinking practices.

There are concerns about the lack of government guidelines and legislation regarding the marketing and sale of no- and low-alcohol drinks (Miller et al. 2021). Two separate studies that analyse marketing messages for no- and low-alcohol drinks suggest that they are often positioned as accompaniments to occasions where alcohol would not usually be consumed, such as lunchtime and fitness activities (Nicholls 2022; Vasiljevic et al. 2018). The marketing campaigns also draw connections between lower

strength beverages and their health benefits. As such, questions have been raised as to whether no- and low-alcohol drinks promote additional alcohol consumption, and if they serve as “gateway drinks” by introducing alcohol brands and alcohol-like drinks to under-age youth (Vasiljevic et al. 2018). Indeed, some labels and branding are not clearly differentiated from alcohol-full drinks (Miller et al. 2021). These concerns are perhaps most legitimate regarding no- and low-alcohol versions of established alcohol products and brands (such as *Heineken 0.0* and *McGuigan Zero*) compared to the new, independent drinks brands that exclusively produce alcohol-free drinks (such as *Big Drop* and *Thomson & Scott*).

The relatively recent consumer movement towards craft and artisanal drinks, particularly beer, has been identified and explored by academics (Thurnell-Read 2019; Waehning et al. 2018). Indeed, Club Soda and Fifty.io’s (2021) aforementioned report suggests that there is overlap between the consumers who engage with no- and low-alcohol drinks and those who are interested in craft/specialist drinks/food. Despite this, research on craft drink cultures remains focussed on alcohol-full drinks and has not yet expanded to the no- or low-alcohol alternatives. Furthermore, research of no- and low-alcohol products remains predominantly focussed on beer and wine alternatives produced by established brands, thus overlooking the rest of the category (Anderson et al. 2021a).

Evidently there remain many unanswered questions regarding the production, consumption, promotion, and regulation of no- and low-alcohol drinks, despite the increasing economic and social imperative to understand who is consuming these products and why. After an explanation of the present study’s research setting and methods, I explore the demographics of customers who visited the UK’s first “alcohol-free off-licence.” I will then draw from illustrative examples within the data to consider why customers engaged with these products, and how their experience of no- and low-alcohol drinks was influenced by whether they were abstinent or were consumers of alcohol.

Research setting and context

This research was conducted at a temporary “alcohol-free off-licence” owned by Club Soda, a “social business” and online sobriety community that “helps people drink more mindfully and live well” (Club Soda n.d.). It was located on Great Portland Street, London, and was open between December 13, 2021, and March 27, 2022.

This research site was selected due to the following unique factors:

1. It was the first physical retail store that sold exclusively no- and low-alcohol products.
2. The off-licence stocked the largest range of no- and low-alcohol products in one UK-based, physical shop — 345 products from 101 brands (all under 0.5% ABV), ranging from beers, wines, spirits, botanicals, kombucha, cocktails and more. The

majority of the brands and products were not widely available in retail stores (Club Soda 2022).

3. The shop operated on a Try-Before-You-Buy basis whereby customers could try multiple products, at no cost, prior to purchase.
4. The shop also served as space for events, organised by Club Soda and other online sobriety communities.¹

In summary, Club Soda's alcohol-free off-licence presented a site in which I could observe, understand, and clarify consumer engagement with a large number of no- and low-alcohol drinks in real time. In contrast with a typical UK supermarket, it provided opportunities for richer data collection, beyond sales figures, and centred on customer experience.

The aims of the study were to understand:

1. Who consumes no- and low-alcohol drinks, and why?
2. Purchasing trend variations across customer demographics.
3. How do no- and low-alcohol drinks influence (non-) drinking practices? Or, how do (non-)drinking practices influence no- and low-alcohol drinks consumption?

Methods

I have drawn from the ground-breaking methods of sociologist Annie Marion MacLean who pioneered early critical ethnography through immersive participant observations, in combination with qualitative, experiential, and quantitative methods (Deegan 2014; MacLean 1899; MacLean 1903; MacLean 1910). I conducted eight periods of ethnographic, situational, intermittent observations of customers within the temporary, commercial alcohol-free off-licence (Madden 2017). Customer observations occurred whilst I worked four shifts, each around six hours, on a voluntary basis, and attended four social events hosted within the shop, such as an alcohol-free wine masterclass. I observed the behaviour of consumers whilst I was serving them or whilst I was socialising and took notes in my field diary when possible. I then wrote up my field notes electronically after the shift or event and made any additions or edits from further recollections. In total, I collected data on 148 customers, which included: demographic data, "drinker" or "non-drinker" status, purchase data, and other (non-)drinking biographical information such as personal stories or accounts of (non-)drinking experiences. It was not possible to obtain complete data sets on all individuals due to the limitations of being the only researcher in a busy, commercial environment. However, I was still able to reach data saturation with the volume of data collected.

¹ Online sobriety communities are web or social media-based communities that have emerged since 2012. They offer a range of services to support people in sobriety, including online peer-to-peer support, online courses, webinars and in-person events. For further reading see Davey 2021.

I also conducted semi-structured, one-to-one interviews with five staff members to understand their observations. During the interviews I used a discussion prompt on 12 topics including, but not limited to: customer demographics; gendered differences in shopping behaviours; differences in shopping behaviours between drinkers and non-drinkers; common requests and feedback from customers; and, how customers interacted with social media in the shop. At the time of interviews, staff members had worked at the off-licence for between three and 15 weeks. All five were white and aged between 30 and 60. Three identified as women, one non-binary, and one man. All interviews were conducted via Zoom, lasted an average of 59 minutes, and were conducted whilst staff were either at the shop or in their homes. These were recorded and later transcribed and pseudonymised by me. Staff interview data was subsequently triangulated with my field data.

Transcripts and observational notes were read twice prior to coding to ensure understanding and to identify patterns across the data. Using NVivo 12, codes were then applied to link data to categories, such as “women”, “non-drinker”, and “online sobriety communities.” These were then sorted into a hierarchy chart and thematically analysed (Coffey and Atkinson 1996). In response to the aforementioned research questions, these codes were then collated into the two most prominent themes: non-drinkers and current drinkers. This manual method of analysis by one researcher does create potential for errors and bias. However, it is appropriate for a relatively small, largely qualitative, data sample. It also facilitates a close reading of the data by a researcher who is familiar with product- and industry-specific terminology and community practices.

My own positionality within this research is that I am an “intimate insider” (Taylor 2011) to some London-based and online sober spaces. I had previously conducted some academic engagement work with Club Soda on a voluntary basis, and I utilised their online community during my own sobriety journey four years ago. I was also aware of other online sobriety communities, and some of their members, through my research. My track-record of trustworthiness, diligence, and respectfulness towards individuals within these spaces facilitated my access to this unique research opportunity. My insider status also provided me with a foundation of knowledge regarding experiences and terminology to craft appropriate research questions and questions for participants.

However, at the time of data collection, I had limited knowledge and experience of no- and low-alcohol drinks – I documented my evolving feelings and experiences regarding specific products, and the category more generally, within my field diary. Having achieved (and maintained) sobriety without the tool of alcohol-free drinks, I was not reliant upon them to socialise or to manage cravings. Some I found to be disconcerting due to their similarity to alcoholic drinks, and I avoided many due to a medical requirement to maintain a low sugar intake. Whilst working in the off-licence I tried many drinks in order to enhance my ability to serve and advise customers, and

I subsequently purchased a number of them. Since the closure of the shop, I consume and purchase vastly less but retain a higher level of interest and consumption than prior to conducting this research.

Continually reflecting on these personal experiences helped to minimise my bias during the research, however limitations persist. The data collected for this research could have been influenced by temporality; I did not work full-time nor every day at the off-licence. I worked to off-set this impact by working different shift patterns on different days of the week. However, this article only reflects the experiences of those whom I had contact with. It may have been the case that my positionality as a 31-year-old, white, middle-class woman influenced whether customers were likely to ask me for assistance, and the rapport I had with customers. Due to COVID-19 restrictions, I was also wearing a face-covering at all times in the shop which could have further impacted rapport with customers. Yet the triangulation of my observational field data with the observations of other staff members, obtained during semi-structured interviews, facilitated the identification of outliers or bias-based data.

This research received ethical approval from Canterbury Christ Church University in February 2021 as part of a mixed-methods, ethnographic research project regarding online sobriety communities and women's identities in sobriety, and subsequently received gatekeeper approval from Club Soda in December 2021.

Findings

Who purchased no- and low-alcohol drinks?

This section provides quantitative analysis of who visited the off-licence and engaged with no- and low-alcohol drinks. Customer demographic data was collected by me during observations whilst on shift and at events. Unless specifically disclosed to me by customers whilst I was serving them, the demographics of customers are based on my interpretation of their presentation of gender, ethnicity and age. As such, the data is limited in its reliability but can be used to identify general patterns.

Women were most likely to be customers at the off-licence (n=88 of 148) which contradicts the limited understanding of gendered patterns of no- and low-alcohol drink consumption presented within existing research (Corfe et al. 2020). Furthermore, non-drinking women outnumbered non-drinking men by over 100% which would suggest that sober women are engaging with off-trade no- and low-alcohol drinks at a higher rate than sober men.

The vast majority of customers that I observed were of White ethnicity (n=117), with smaller numbers of Black, Asian and minority ethnic communities (n=31). While these findings are somewhat reflective of the UK's demographics on race, they are not representative of London where the shop was located (Gov.UK 2018). The race and

ethnicity of those who engage with no- and low-alcohol drinks is largely absent from existing research and thus requires further investigation.

Despite the recent focus on adolescent alcohol refusal (Caluzzi et al. 2021; Vashishtha et al. 2020), customers were typically older than teenagers or adolescents. There were customers across a range of age groups, with a clear dominance of individuals from the millennial generation which supports some findings in this field (Anderson et al. 2021b; Club Soda and Fifty.io 2021; Corfe et al. 2020; Nicholls 2022): 20s (n=24), 30s (n=41), 40s (n=29), 50s (n=31), 60s+ (n=13). The age profile of customers challenges some concerns raised about the potential for no- and low-alcohol products to act as “gateway” drinks for underage drinkers (Miller et al. 2021). Some children attended the off-licence with their parents, but these were not recognised within data collection as independent customers.

Lastly, the off-licence attracted relatively equal proportions of those who do not consume alcohol at all (n= 62) and those who still consume alcohol (n=63) (unknown: n=23). This balance contradicts some existing research that suggests consumers of no- and low-alcohol drinks are most likely to be consumers of alcohol (Anderson et al. 2021b; Corfe et al. 2020; Miller et al. 2021), and instead supports the more mixed picture reflected in a recent qualitative study by Nicholls (2022).

This quantitative analysis of observational data provides a high-level overview of who engaged with no- and low-alcohol drinks at the off-licence but is subject to the limitations previously highlighted. Nevertheless, the data suggests a pattern that customers were more likely to be women, white, and of the millennial generation. It is likely that Club Soda’s role as an online sobriety community could have influenced the demographics of those who visited their shop, including the higher volume of non-drinkers than has previously been reflected in studies (Anderson et al. 2021b). These findings are generally aligned with the demographics of those who use online alcohol support groups/communities and temporary abstinence initiatives (Davey 2021), such as Club Soda.

This pattern of gendered consumption could also be because women are most likely to consume (alcohol-free) drinks within the domestic setting (Emslie et al. 2015; Lyons and Willott 2008; Waite and Clement 2016), and therefore purchase drinks from retailers, compared to men who may still be more likely to consume within public spaces, in on-trade venues. In addition, men are more likely to consume alcohol-free beers (Anderson et al. 2021b) due to gendered (non-) drinking behaviours (Conroy and de Visser 2012; Thurnell-Read 2011) — reinforced by marketing campaigns (Nicholls 2022) — and no- and low-alcohol beers are increasingly available within mainstream supermarkets. Consequently, for men (and other beer drinkers) there may be less incentive to visit a specialist alcohol-free off-licence.

The location of the shop, in central London, is also likely to have impacted who engaged with no- and low-alcohol drinks. While it served as a destination for some

who lived outside of London, there is a financial and temporal cost to visiting central London, and there are physical challenges to navigating the city. These findings emphasise the need for more research to greater understand the demographics of those who purchase no- and low-alcohol drinks, and the barriers to participation for those who do not.

Next, qualitative findings from customer observations and staff interviews will be considered to inform further understanding regarding why individuals purchased alcohol alternatives from the off-licence, and how no- and low-alcohol beverages form part of their (non-)drinking practices. First, I will explore patterns amongst non-drinkers (those who have never consumed, or who no longer consume, alcohol), and then subsequently discuss the patterns amongst those who still consume alcohol.

“I don’t want to drink but...I want to feel part of it”: the use of no- and low-alcohol drinks to support abstinence

Based on customer observations, former drinkers appeared to engage most enthusiastically with the number of no- and low-alcohol options available and eagerly participated in the Try-Before-You-Buy experience. Whilst being served, these individuals typically spoke of the absence of alcohol-free choices when they had first stopped drinking. One customer — a man in his 50s, who had been sober for 21 years — told me of his experiences whilst he was sampling drinks:

I was always given the dusty bottle of tomato juice that had been sat at the back of the fridge for a few years. I stopped going out to the pub in the end. (Man, customer)

This man’s story shows how no- and low-alcohol drinks could facilitate the return of sober people to some alcohol-centric spaces, such as the pub, if they feel catered for, and in turn support the “reinvigoration” of these spaces (Markham 2020). This customer went on to tell me about his sobriety and the reasons why he gave up drinking; he wanted to be a better role model for his young daughters instead of being the father who “rolled in drunk from the pub every night.”

Similar disclosures by former drinkers were encountered by other staff members too; during her interview, staff member Lisa reflected on this phenomenon:

The off-licence offered not only a place where people could explore alcohol-free drinks but also a place of community and safety, where people could come in and open up a little more about where they’re at than they could have done in another space. (Lisa, staff member)

As such, observations suggest that former drinkers identified the off-licence to be a place where recovery and sobriety were de-stigmatised which enabled them to feel comfortable when talking to staff about their challenges and experiences of sobriety — they were no longer the stigmatised, excluded other (Herman-Kinney and Kinney 2013; Hill and Leeming 2014).



Figure 1: Picture of the off-licence shop floor, taken on January 22, 2022, by the author.

Figure 1 above shows the premises during a social event hosted by an online sobriety community. This was one of two events by online sobriety communities that I observed, and staff observed a further two. This picture conveys how former drinkers utilised the boutique retail space to sample the drinks, and learn about them directly from product representatives, whilst socialising with others. Thus, the off-licence became a meeting place for those in sobriety, and the drinks offered a conversation-

starter amongst strangers who were there to build connections in sobriety. These observations support existing research that emphasises the role of craft drinks in identity formation and consumption politics (Schnell and Reese 2014; Withers 2017). Furthermore, it suggests that sober spaces and alcohol-free alternatives can create connection and community that has traditionally been the domain of the village pub (Markham 2013; Thurnell-Read 2021). Such spaces may also attract a more diverse customer demographic than have historically been served by pubs or bars; Figure 1 conveys largely female customers, one of whom is wearing a hijab. Drinking and socialising within an affirmatively alcohol-free space may reduce the gendered, or cultural, stigma associated with drinking in public places (Lyons and Willott 2008; Waitt and Clement 2016). Women may also feel safer in an alcohol-free environment which omits the aggressive heterosexual pursuit that occurs within the Night-Time-Economy (MacLean 2016; Peralta 2008).

Based on conversations I had with customers during the sale process, I observed that those who had stopped drinking recently were more likely to purchase no- and low-alcohol drinks for regular consumption in the domestic setting. In December purchases of sparkling wine alternatives were particularly high; customers who were non-drinkers often disclosed how this product would help them to “fit in” with family or friends during festive occasions. Furthermore, five women told me that they were nervous about how to “get through” their first Christmas without drinking; they typically purchased a number of no- and low- alcohol drinks so they had options for different social situations.

These findings provide a strong challenge to existing narratives regarding “addiction” consumption (Anderson et al. 2021b; Corfe et al. 2020; Miller et al. 2021) by showing how no- and low-alcohol alternatives are used as a support tool by those who are trying to give up alcohol. These shopping behaviours suggest that some customers seek to mirror their previous consumption of alcohol-full drinks, manage cravings, and behavioural dependency using no- and low-alcohol drinks. However, those who had entered sobriety recently were more likely to have used no- and low-alcohol drinks as a tool in their early recovery, compared to those who entered sobriety over two years ago when product choice and availability were limited.

A minority of individuals in recovery sought advice on appropriate alcohol-free alternatives after raising fears that drinks which smelled or tasted too much like alcohol could prompt them to start drinking again. One man in his 30s, who had been sober for 10 years, was curious to try some products but confessed to me that he had “always been hesitant about alcohol-free drinks” for this reason. He purposefully avoided “alcohol-tasting items” but wanted “to give it another go” in order to find something suitable. His experience shows how former drinkers consciously navigate and negotiate the drink choices available to support their sobriety and echoes previously documented concerns about an individual’s risk of relapse after exposure to no- and low-alcohol drinks (Corfe et al. 2020). However, these findings identify how former

drinkers sought specialist knowledge from staff, and a safe, supportive environment in which they could sample small volumes, to minimise risk.

During staff interviews, I learned that footage of the off-licence had been widely shared on TikTok amongst London's Muslim community. Consequently, large numbers of Muslim customers visited the shop for the proceeding week. One customer, a young woman of faith, said to me whilst sampling: "I don't want to drink but my friends drink, and I want to feel part of it." She hoped, therefore, that alcohol-free drinks would enable her to negotiate contemporary drinking practices in the UK, and maintain her friendships, whilst honouring her religious beliefs. While previous studies have shown mixed findings regarding the role of no- and low-alcohol drinks in enabling non-drinkers to fit in with peers (Corfe et al. 2020; Nicholls 2022), this woman's experiences demonstrate how these drinks can support religious-based cultural non-drinking practices. As Nicholls argues, "a simple 'addition versus substitution' model may be too rigid to account for participants' *changing* [her emphasis] relationships with no- and low-alcohol drinks and fail to accurately capture the experiences of non-drinkers (for whom addition does not fit as a concept)" (2022, 24; see also Nicholls 2021).

Both I and staff members observed, whilst serving lifelong non-drinkers, who typically abstained for religious reasons, that they often preferred drinks that were based on flavours already known to them, such as a sparkling tea, or a fruit-based alcohol-free cocktail. Some declined dealcoholized products, sometimes for religious reasons, but more often it was due to the savoury, dry taste of dealcoholized drinks compared to alcohol-free alternatives, as staff member Louisah reflected during her interview: "People who had never drank before wanted something sweeter." This highlights the differences in purchasing behaviours between those who have never consumed alcohol compared to those who have stopped consuming alcohol; not all customers of alcohol-free products sought drinks that mimic the taste, smell or appearance of alcohol. This cultural nuance has hitherto been overlooked within existing studies which have predominantly focussed on beers and wines. These findings also convey how products require clear labelling regarding their no or low alcohol content — including whether they have been dealcoholized — and how specialist staff knowledge can help customers of faith navigate the category.

Despite some concerns regarding the potential of no- and low-alcohol beverages to be "gateway" drinks for under-age drinkers (Miller et al. 2021), adolescents under the age of 18 did not generally visit the off-licence. In some instances, young children were brought along with parents who wanted to sample drinks. In December, a South Asian family visited the shop. The mother purchased each of the three children an alcohol-free cocktail and beer that were all 0%. Whilst in the shop, she tasted a few drinks and the children excitedly engaged in the process. Despite their ages of roughly 10-14 years old, the children "performed" tasting in the way that one would expect experienced drinkers to do. They swilled the drink in the glass, smelled the drink, and held the drink

in their mouths to taste. Similar encounters were recalled by Ashley during interview. It was evident from discussions that this family did not consume alcohol and yet the children mimicked cultural practices that society associates with alcoholic drinks. At the time, this situation felt odd and uncomfortable to me. On reflection, this observation supports a number of pre-existing research findings. First, marketing strategies of no- and low-alcohol products can be effective in positioning alcohol-free drinks as “adult” drinks despite their 0% content (Nicholls 2022; Vasiljevic et al. 2018); and second, within British culture, young people’s interactions with alcohol and its alternatives are stigmatised (Plant and Miller 2001). Lastly, as Miller et al. argue, more research could be conducted regarding the role of no- and low-alcohol products on the (non-)drinking practices of under-age youth (2021).

“I flirt with sobriety”: no- and low-alcohol drinks as a tool for moderation

Customers who were still consumers of alcohol but were interested in no- and low-alcohol drinks as a tool to moderate or drink “mindfully” (Tolvi 2017), formed almost half of my sample. This group includes the “sober curious” (Warrington 2019), those completing temporary periods of abstinence, and pregnant women. The dominance of this segment aligns with existing research which suggests that those who consume the most alcohol are driving the demand for alcohol-free drinks (Anderson et al. 2021b). However, there were discernible differences in how this customer segment navigated and experienced the off-licence, compared to abstinent individuals, which this section will go on to explore.

On entering the off-licence, some male customers who were drinkers strongly emphasised to staff, “I’m a drinker” or “I still drink.” As explained by staff member Veronica during her interview, “they tell you very actively...they want you to be very aware of that.” I interpreted this as a warning to staff not to “convert” them to sobriety and to manage expectations. It could also be read as a self-affirming attestation of identity, emphasising their positionality in the sober/drinker binary (Advocat and Lindsay 2015; Romo et al. 2015), and to mitigate any damage to masculinity as a result of their interest in alcohol-free options (Conroy and de Visser 2012). After asserting their positionality, I observed that drinkers quickly self-corrected and said something similar to: “But I don’t drink too much, well maybe sometimes, but not regularly.” Therefore, some drinkers were consciously aware of the tightrope of acceptability regarding drinking behaviours and actively managed the stigma associated with problem or heavy drinking. Such pro-active declarations of self were not typically issued by non-drinkers and instead arose more naturally within the flow of conversation during the sales process. As such, the off-licence provided a previously unknown and untested space in which, perhaps for the first time, drinkers felt that alcohol consumption was not the norm and they, as drinkers, were no longer in the overwhelming majority. Thus, there became a role reversal between non-drinkers and

drinkers where the latter worked harder to assert identity and justify their drinking practices.

Some drinkers visited the off-licence with their non-drinking friends and subsequently became involved in tasting different drinks which generated new interest around no- and low-alcohol drinks. Sam, another member of staff, spoke of an instance when a group of three women had travelled to London, from Scotland, for their annual weekend away. One of them was a non-drinker and brought her two friends who were drinkers:

They were quite blown away about the drinks...how good they are. She was quite anxious...but once they actually got to the shop and on a “wine journey” she relaxed, they relaxed, and the two drinking friends were quite happy with the experience and what they had been able to try. (Sam, staff member)

This observation from Sam conveys another role reversal; typically, alcohol-free drinks are used by the non-drinker to fit in to a drinking event (Nicholls 2022). In this instance, the off-licence became a way to introduce drinking friends to alcohol-free products and spaces, in which they had to consume no- and low-alcohol products to assimilate. It provided an alternative, alcohol-free venue in their typically alco-centric Girls’ Night Out (Nicholls 2019).

Although the pop-up off-licence sought to target the trade generated by widespread engagement with Dry January (Alcohol Change UK 2020; Beer 2020), relatively few of the customers I served were affirmatively taking part in Dry January. I worked two shifts in January and would typically ask customers, ‘Are you doing Dry January?’ as a way to open conversation. Of the 70 customers I served during January, only six affirmed that they intended to abstain for January. This low proportion suggests that those who are only abstaining for a month may not be interested in obtaining alcohol-free alternatives. It could also be the case that having a dry January additionally serves to reduce spending after the festive season, which conflicts with expenditure on no- and low-alcohol drinks (de Visser and Nicholls 2020; Taylor 2019). However, those who attended the alcohol-free cocktail masterclass that I observed in January were more likely to be doing Dry January – almost all 21 hands were raised in response to the question, “Who’s having a Dry January?”, yet this question could have been answered positively by those who are long-term abstinent which subsequently “muddied the waters” (Ashley, staff member).

Instead, it was more common that customers aligned with “new year, new you” discourses to renegotiate their drinking behaviours (Yeomans 2019). By way of example, a woman who lived near the off-licence saw January and alcohol-free drinks as an opportunity to “get back into a good routine” and create long-term behavioural change by no longer consuming alcohol at home. A few female customers suggested they were trying to not drink during January but hoped it would become a more permanent choice if they enjoyed the alcohol-free alternatives. These sentiments echo

Nicholls' findings that some people use no and low-alcohol drinks as a "nice little life hack" (2022, 27).

There were a number of customers, typically young females, who suggested that they "flirted with sobriety", were "sober-curious," or regularly undertook periods of temporary abstinence, which seemed to reflect recent research regarding young people's ambivalence regarding alcohol (Caluzzi et al. 2020; Törrönen et al. 2019). For these customers, no- and low-alcohol drinks were not consumed as a daily placebo to manage cravings. Instead, these customers sought something interesting and creative for occasional use; there was more intrigue about different flavours, pairings and ingredients by these customers, and products were usually purchased with a special event in mind – they were the emerging alcohol-free "craft aficionados" (Club Soda and Fifty.io 2021, 4).

Staff members Veronica and Ashley observed that another sub-group of drinkers who engaged with no- and low-alcohol drinks were sports people, or those who were interested in fitness:

They're often middle-aged people training for a marathon or a cycle thing and just don't want to drink and actually don't want to have something that's high in sugar or high in calories. (Veronica, staff member)

This non-drinking practice is aligned with existing research which suggests that no- and low-alcohol drinks are consumed when alcoholic drinks would be inappropriate, such as prior to (or because of) exercise and productivity (Corfe et al. 2020; Nicholls 2022; Vasiljevic et al. 2018). Indeed, when I observed a wine masterclass in January which consisted of eight people, four of whom were drinkers, sugar content of alcohol-full and alcohol-free wine were both of concern and interest to participants, and thus marketing of no- and low-alcohol drinks as healthier alternatives (Nicholls 2022; Vasiljevic et al. 2018) may serve to attract customers who are drinkers.

During customer tastings, I observed that drinkers were more likely to compare alcohol-free drinks with alcoholic drinks and felt that some no- and low-alcohol alternatives were lacking the strength and heat that ethanol provides. For this customer segment, their experience of no- and low-alcohol drinks was more likely to be affected by how staff introduced the products, as staff-member Ashley explained:

It's about leading people in, prepping people before you're offering them something that's a bit outside of the box...to lead people from "I want a full whiskey alternative" to "this can be done in the same way as a whiskey...there's some smokiness in there, but it's something different"...if you offer it unprompted their reaction is "well it's nothing like a whiskey" and it's thrown away. (Ashley, staff member)

Our observations highlight the difference in experiences of, and attitudes towards, no- and low-alcohol drinks for those who still drink and may have pre-conceived ideas or pre-learned flavours. It also suggests that the Try-Before-You-Buy shopping

experience could work to overcome customer bias regarding these products. I observed that the most disappointed customers were women who were searching for alcohol-free alternatives for consumption during pregnancy; some expressed a longing for what they could no longer have. They also experienced heightened sensitivity to flavours, smells and sweetness that may be typical of sensory changes during pregnancy (Nordin et al. 2004) and thus I found it more challenging to advise this customer segment. It also became apparent that some alcohol-free drinks advised that they were not suitable for pregnant women, likely due to the herbal or caffeine content. As Miller et al. (2021) highlight, this is an important area which deserves further attention considering the numbers of women who will experience pregnancy, and due to the known health risks associated with alcohol consumption during pregnancy (NHS 2020).

Conclusion

Within this article I have presented insights regarding who engaged with no- and low-alcohol products at a specialist shop that also served as a destination venue and events space. In doing so, I have conveyed how online sober communities can influence customer engagement with no- and low-alcohol products, and shape (non-)drinking practices in physical spaces. Furthermore, the importance of the Try-Before-You-Buy model has been identified for both non-drinkers and drinkers; the ability of customers to taste, smell and mix drinks within this shopping environment, which also assisted connection with like-minded individuals, impacted their experiences of no- and low-alcohol products. The Try-Before-You-Buy model facilitated greater customer engagement with no- and low-alcohol drinks, and consequently, offered richer opportunities for customer observations than would have been afforded in a typical supermarket retailer. However, this was a relatively small-scale study which largely captured consumers based in London and the surrounding areas. The location of the shop (in central London) also impacted how much customers could buy (and carry), due to reliance on public transport.

Quantitative findings suggest that the off-licence attracted a more diverse customer segment than presented within existing research of no- and low-alcohol products, with greater racial and gender diversity than previously identified. Future quantitative research should continue to explore purchase trends and customer demographics, with a focus on specialist shops (online and offline) and alcohol-free bars that stock a wider variety of no- and low-alcohol products (compared to supermarkets and pubs), and who offer informed product knowledge to customers.

Qualitative findings suggest that the most prominent influence on how customers experienced and used no- and low-alcohol beverages was whether the customer was a drinker or non-drinker. While I have demonstrated how no- and low-alcohol products are used by non-drinkers to support an alcohol-free lifestyle, I have also contextualised customer experiences; customers' use of no- and low-alcohol drinks is impacted by

how long they have been abstinent; short-term, long-term, or for life. This paper has also explored how drinkers engage with no- and low-alcohol beverages, and how these products are used to manage a “mindful” approach to drinking. Of particular interest was the phenomena of role reversal between drinkers and non-drinkers, whereby drinkers engaged with no- and low-alcohol products to “fit in” with their non-drinking friends or family and appeared to work harder at asserting their drinking identity in an alcohol-free space. Future qualitative research should continue to examine the role of no- and low-alcohol drinks within individuals’ (non-)drinking biographies and practices, particularly their ability to reduce alcohol-related harms, and alcohol-related harm inequalities.

In light of the plethora of emerging independent no- and low-alcohol brands, there are significant opportunities to explore themes of craft and entrepreneurship within this segment. There is also a need to greater understand the role of social media in driving sales of no- and low-alcohol drinks; advertisements, influencer endorsements and sobriety community promotions are emerging across social media platforms — how do these inform (non-)drinking practices? Such explorations would benefit from greater cross-collaboration between academia and online sobriety communities who are gatekeepers to data and experiences of those engaging with, and purchasing, no- and low-alcohol drinks.

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