

ATTITUDES TOWARDS LOW- AND NO-ALCOHOL DRINKS – GERMANY

There is huge potential for brands to extend the range of low-/no-alcohol drinks available as a growing number of Germans limit/reduce their alcohol intake.



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Report Content

EXECUTIVE SUMMARY

Key issues covered in this report

- Overview

The impact of COVID-19 on attitudes towards low- and no-alcohol drinks

- Impact of COVID-19 on Attitudes towards Low- and No-alcohol Drinks

Market context

- Cater to rising numbers of alcohol reducers
- Ensure differentiation with competing soft drinks
 - Graph 1: types of soft drinks drunk in the last three months, 2019, 2020 and 2021

Mintel predicts

- Help drinkers stick to their resolutions
 - Graph 2: expected change to alcohol consumption after the outbreak eases compared to before the COVID-19 outbreak, 2021
- People reduce their alcohol consumption as they age

Opportunities

- Reassure drinkers of the benefits of 'better-for-you' low-/no-alcohol drinks
- Align messaging with health and fitness
- Focus on taste to reassure sceptical consumers
- Encourage trial of spirit alternatives with drink recommendations
 - Graph 3: experience of and interest in spirit alternatives, 2021
- Tap into demand for low-/no-alcohol RTDs
- Reassure on quality to justify prices
- Get on party organisers' shopping lists
- Quick download resources

MARKET DRIVERS

- COVID-19: market context
- The impact of COVID-19 on the German economy
 - Graph 4: key economic data, in real terms, 2019-22
- Alcohol consumption is declining in Germany...
- ...presenting a huge opportunity for the drinks industry

Attitudes towards Low- and No-alcohol Drinks – Germany

- Appeal to consumers with low-sugar options
- Functional benefits can extend a healthier image for low-/no-alcohol drinks
- Lower calorie content is also an important selling point
- Appeal to eco-conscious drinkers
- Soft drinks are natural competitors
 - Graph 5: types of soft drinks drunk in the last three months, 2019, 2020 and 2021
- Alcohol brands campaign against misuse

WHAT CONSUMERS WANT AND WHY

The impact of COVID-19 on consumer behaviour

- On-trade is hit hard by lockdowns
 - Graph 6: change in spending habits on drinks compared to before the COVID-19 outbreak, 2021
- Alcohol moderation to gain further momentum
- Low-/no-alcohol beer drinkers increase their consumption
 - Graph 7: low-/no-alcohol beer drinkers surveyed who were drinking more low-/no-alcohol beer (as of December 2020) than before the COVID-19 outbreak, by age, 2020

Change to alcohol consumption in the last 12 months

- One in five Germans have reduced their alcohol intake
 - Graph 8: consumers who have limited/reduced the amount of alcohol drunk in the last 12 months in comparison to how much is normally consumed, 2021
- Over-55s are most likely to not drink alcohol
 - Graph 9: consumers who have limited alcohol consumption in the last 12 months or don't drink alcohol, by age, 2021

Reasons for limiting/reducing or not drinking alcohol

- Improving health drives alcohol moderation...
 - Graph 10: reasons for limiting/reducing amount of alcohol consumed in the last 12 months, 2021
- ...especially among older adults
- Men and younger adults are most interested in saving money
 - Graph 11: netted reasons to limit/reduce alcohol consumption in the last 12 months, by gender and age group, 2021
- Non-drinkers are very health aware
 - Graph 12: reasons for not drinking alcohol, 2021

Strength of alcoholic drinks consumed by alcohol drinkers

- Lower-alcohol drinks appeal mostly to younger drinkers
 - Graph 13: strength of alcoholic drinks consumed in the last three months, 2021
- Low-/no-alcohol beers are popular
- Beer brands experiment with new flavours
- Lower-alcohol spirits have more potential...

Attitudes towards Low- and No-alcohol Drinks – Germany

- ...especially gins...
- ...along with lower-alcohol RTDs

Low-/no-alcohol drinks consumed in the last three months by non-drinkers

- Modest appeal to non-drinkers
 - Graph 14: types of low-/no-alcohol drinks consumed in the last three months by non-drinkers, 2021
- Greater take-up among men
 - Graph 15: frequency of drinking no-alcohol drinks in the last three months, 2021

Interest and behaviours towards spirit alternatives

- Spirit alternatives have a clear youth appeal
 - Graph 16: experience of and interest in spirit alternatives, 2021
- Smaller bottles would encourage trial
 - Graph 17: behaviours towards low-/no-alcohol drinks, 2021
- Inspire usage with recommendations and long drink suggestions
- Non-drinkers need recommendations
- Taste concerns are a turn-off for some...
- ...but alternative benefits could overcome this
- Low-/no-alcohol beers feature functional ingredients

Attitudes towards low-/no-alcohol drinks

- Drinkers agree the taste has improved over time
 - Graph 18: attitudes towards low-/no-alcohol drinks, 2021
- Price points need some justification
- Explain the process to prove taste credentials (and price)
- Tap into celebrations and drinking as an occasional treat
- Encourage low-/no-alcohol drink pairings with meals

LAUNCH ACTIVITY AND INNOVATION

- Niche, but growing share of NPD
- Brewers in the lead
 - Graph 19: low-/non-alcoholic NPD by leading sectors, 12 months to Sept 2021
- Low-/no-alcohol drinks NPD mirrors wider food & drink trends
- Low-/no-alcohol drinks NPD mirrors wider food & drink trends
- Vegan, organic or free from artificial additives claims tap into broader food & drink trends
- Providing premium cues for on-shelf standout
- Moral brands appeal to ethical shoppers
- International inspiration: flavours

APPENDIX

Appendix – products covered, abbreviations, consumer research methodology and language usage

- Products covered in this Report
- Abbreviations
- Consumer research methodology
- A note on language

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