

The background is an abstract composition of swirling, marbled colors in shades of purple, pink, and orange. A prominent diagonal band of a darker, more saturated magenta color runs from the top-left towards the bottom-right, creating a sense of movement and depth.

KANTAR

# THE FUTURE OF ALCOHOL

KANTAR'S GUIDE TO THE TRENDS & CONSUMER  
ATTITUDES SHAPING THE ALCOHOL MARKET

**Winnie Cheng**

Senior Product Marketing Director at Kantar

## Chapter 1: Sober Curious

As wellness becomes a goal that permeates every area of consumers' lives, sober attitudes are changing the way people drink and **challenging brands to think of new ways** to create new products and promote their uses or benefits.

The biggest shift in this attitude is that being sober or choosing low-alcohol alternatives is not done out of necessity, but **lifestyle choice**. Post-Covid, having good health has gained new meaning as consumers were forced to **reassess their priorities**. It also meant that keeping your well-being in check was one way to be in control amongst such a chaotic world. According to Kantar Global Monitor (2022), 75% of global consumers are actively trying to improve their health.

**Flexibility is the new motivation**

More fluid lifestyles and changing health concerns mean consumers are dipping in and out of their drinking behaviours, with a focus on flexibility and making choices depending on context, goal or event.



The highest cohort of low/no alcohol (at 41%) are 'substituters', who choose these products when avoiding alcohol on certain occasions.<sup>1</sup>

<sup>1</sup>Source – ISWR, 2022

# The sober mindset matures

Led by Millennials and Gen Zs, the sober movement continues to grow and being **‘sober curious’ is now an acceptable, and often welcomed, social behaviour** as people adopt more balanced lifestyles.

In 2019, a survey of British workers showed that 56% of Millennials considered themselves mindful drinkers, versus 37% of Baby Boomers. Most recently in 2022, 20% of adults participated in Dry January, a rise from 13% in 2021<sup>2</sup>, with Sober October now also coming up the ranks. There has also been a 49% growth in searches for no-alcohol alternatives in the past 2 years, with 4.1m average monthly searches.<sup>3</sup>

## Three brands dominate

Lyre's, Seedlip and Gordon's generate the most interest as they make up the largest share of non-alcoholic spirit branded search in the UK.<sup>4</sup> Through presenting mocktail recipes on their website and engaging with consumers in key moments such as Sober October, Lyre's are able to lead the category in a way that demonstrates that alcohol-free can still be enjoyable.

## A niche community that continues to grow

From sober bars to pop-ups and support groups akin to running clubs, as this behaviour grows, so do opportunities for like-minded curious Millennials and Zoomers to explore low or no-alcohol options. Major capitals like New York and London are already littered with sober bars that emulate what bargoers have become accustomed to – from a trendy DJ to Instagrammable mocktails. Meanwhile, for those who are still choosing to drink, complex cocktails, using new techniques or a plethora of ingredients, are making people enjoy quality over quantity, and still have a reason to go to a bar, rather than (not) drinking at home.

# Cultural manifestation

## The Bartender asks what you're drinking

You're most likely to order...



Wine



Beer



Spirits neat  
or over ice



Mixed drinks  
or cocktails

## Low/no alcohol hubs

London's Club Soda is a platform that helps people drink more mindfully through low/no alcohol drinks. Its retail tasting room sells over 150 drinks brands, including cocktails, beer on tap, and master classes.

Across the pond in California, The New Bar offers a similar approach and includes guides on how to replace an alcoholic beverage of your usual choice, with a more mindful alternative.

## Post-pandemic 'dry dating'

Bumble has introduced a Sober badge to its dating profiles, encouraging its users to be their most authentic selves. This comes after research conducted by the dating platform showed 24% of singles who consumed alcohol said they would not do so when going on dates this year, while 56% of these singletons wanted to focus on getting to know people with a clear mind.

## Mindful drinking coaching apps

More responsible behaviours have spurred a variety of apps claiming to coach and guide people into more mindful drinking. Using modern-day stressors, social occasions and mental health as major drivers, these apps help people meet their goals (from health to budget) through behavioural data, games and mindful activities.



<sup>2</sup> Sources – Jama (2022), Wired (2023)

<sup>3</sup> Source – Kantar Digital Analytics (2023) connection, and celebrating the shared spaces that play an important role in people's emotional and physical wellbeing.

<sup>4</sup> Source – Kantar Digital Analytics (2022)



## Bia Bezamat

Senior Strategy & Cultural Insight at Kantar

# Chapter 2: Spaces

Fragmented lifestyles and new behaviours around alcohol consumption and health are seeing consumers choose new moments to unwind, relax and socialise both in and out of home.

The hospitality industry globally has also taken a severe hit as a result of the pandemic, with clubs, bars and restaurants closing at an unprecedented rate. According to the Night Time Industries Association, **one third of all of UK's nightclubs closed by 2022.**

As a result, traditional drinking moments, which would take you from enjoy a drink at a restaurant through to partying into the early hours - are now competing with a wider range of occasions where people are still enjoying their tipples.

### Elevated in-spiriences

As the effects of the pandemic began to ease off, consumers were soon hit with a cost-of-living crisis that trumped any talks of 'revenge spending' or boundless displays of hedonism. But people are still looking for ways to escape and find joy in different moments of their lives, including elevating at home drinking experiences through new rituals, serves and flavours, with the help of some of their favourite brands.

For example, **Guinness' Microdraught** and **NitroSurge** products, which aimed to recreate the experience of pouring a perfect pint (with foam), helped increase searches of drinking the brand "at home", and subsequently the term **"pouring" by over +200% over the past 3 years**, successfully combining its iconic product feature with a growing moment.<sup>5</sup>



# 40%

of older millennials are drinking more at home, replacing most of their drinking at bars/restaurants (vs. 33% of all).

(Kantar Retail IQ, 2023)

## Day-drinking diversifies

Beyond a boozy brunch, consumers are finding new moments in the daytime to enjoy a drink or two – as the main activity, or post/before a main event.

Kantar Analytics data shows that for the ready to drink (RTD) category specifically, nearly **30 key moments are identified**, such as train journeys (which are popular in the UK) or post-exercise. Innovation in the category is also seeing formats (such as powdered cocktails and wine pouches) or serves (see Pocket Shots, silicon glasses, collapsible cups) formulated for people on the go, either camping, hiking or at festivals.

### Category stretch is at an all-time high

Being able to stretch your brand has been pivotal to ensure it fits into new conversations and occasions in consumers' lives. The pace of social media chatter, as well as smaller, more nimble new players entering the category, are making alcohol brands constantly innovate.

With over 250m views on TikTok, 'vodka sauce' inspired **Absolut** and **Heinz** to create a limited edition sauce that jumped on the viral trend and repositioned the alcoholic brand into a new moment, and for a new audience. Similarly, **Bailey's**' strategy to hijack dessert and piggyback coffee ensured the brand stretched beyond a Christmas treat to a year-round indulgence.

### Long live the third space

Adapting into new moments is important, but so is not losing sight of what traditional hospitality spaces mean for the fabric of society and people's sense of belonging. During the pandemic, people would join live streams of bars across the globe for virtual happy hours, seeking a sense of solace and normalcy. Meanwhile Mexico-based bar **Maverick** launched a platform ([www.imissmybar.com](http://www.imissmybar.com)) where visitors could play a playlist of bar noises – from a bartender working to chatter – to replicate some of its ambience while at home.

**Jim Beam's** recent **"People Are Good For You"** campaign is also emphasising the importance of in real life human connection, and celebrating the shared spaces that play an important role in people's emotional and physical wellbeing.



# 37%

of shoppers are replacing other alcoholic beverages with ready-to-drink/serve mixed drinks, partly to do with the convenience factor when drinking on the go.

(Kantar Retail IQ, 2023)

# 48%

of US Gen Z shoppers look for inspiration for new alcoholic beverages and recipes on TikTok, while 59% of boomers turn to friends and family for inspiration.

(Kantar Retail IQ, 2023)





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## Chapter 3: Hedonism Redefined

How people find pleasure is changing. No-lo alcohol drinking behaviours are already a great indication of this, but much more could be attributed to this new mindset — from a bigger focus on wellbeing, to the cost-of-living crisis and the pandemic creating a desire for experiences that feel more enhanced after a period of sensory deprivation. This sees no signs of slowing down as we continue to grapple with anxiety-fuelled economic and climate uncertainty. In summary, people need fun.

Finding joy and alternative forms of pleasure is the new goal, and as such, new experiences and multisensorial touchpoints are becoming a great way for consumers to step away from their day-to-day and stumble into the unexpected.

During the pandemic, for instance, while many focused on their health and drank less alcohol, several surveys reported the rise of microdosing as a mental health coping mechanism.

Taking comfort in new forms of escapism can be achieved in different ways, from alternative spaces and places, to activating different senses. **Hedonism is evolving, and brands are following suit.**



**60%**  
of global consumers say  
it is extremely important  
to treat themselves to  
things that give them  
pleasure, comfort or joy.

(Kantar Retail IQ, 2022)

## Seeking subversion

Consumers are welcoming all manners of weird and wonderful as new ways to receive that much-needed dopamine hit. From subversive flavours and aesthetics through to conceptual or satirical takes on known experiences, products and flavours.

**Engine Gin** is subverting the norms with small batch **Pure Organic Gin** bottled in packaging designed like fuel cans, inspired by motor racing. Its interactive website, 'Engine Land', acts like a gamified car garage, inspiring users to shop, create cocktails and listen to music whilst learning about the gin's ingredients.


At New York bar **Bad Roman**, maximalist interiors trump 'visual boredom', and the quirkiness extends to its serves, such as shot glasses affixed to matchbox cars.

In fast food, **McDonald's** launch of a limited edition adult Happy Meal (including covetable toys) tapped into nostalgia and play and was a nod to us grownups who still enjoy a childhood favourite.

'Adult Happy Meal' was searched over **4m** times the month of its release, growing from complete obscurity (0 search terms before launch)

(Kantar Analytics 2023)





Research conducted by Kantar in US, UK and Japan across 38 brands found that the more positive and distinctive sensory impressions come to mind, the more loyal people are to a brand.

(Kantar Retail IQ, 2023)

## Transcending taste

Recent Kantar research shows that whilst taste is the most important driver of brand equity in food and beverage, the neuroscience of taste is highly complex and a multi-sensation which relies on the other senses to enhance customer experience.

**Coca-Cola** is among many brands that challenges consumer imagination through the unpredictable with their **limited-edition Coca-Cola Dreamworld**, which explores “the realms of the surreal, the imaginary, and the otherworldly.” Customers can further enhance their senses via an AR music experience and a metaverse fashion collection.

In fragrance, **Byredo** partnered with **RTFKT Studios** to transcend luxury fragrance into the metaverse, creating a directory of wearable auras using 26 NFT ingredients, helping consumers to visualise the intangibility of fragrance as a product.

This begs the question, how can brands move beyond a singular sense to elevate their product and experience through leveraging different platforms and formats?

# The power of viral

Whether we like it or not, social media and its potential for creating desirability and FOMO has a significant impact on alcohol consumption trends, with the shareable and social nature of content encouraging consumers to always want to try something new.

Whilst brands must avoid a 'flash in the pan' moment and focus on longevity, leveraging the platforms' influence will help drive appeal, demand and desirability. There are plenty of online trends that exemplify this well: **ASMR** is a highly popular cultural phenomenon that stimulates the senses through triggers like whispering, crisp sounds and slow movements, such as pouring something in a glass or stirring a drink. Meanwhile with almost 5bn views on **TikTok**, the #latteart hashtag encourages people to make beautiful caffeinated recipes at home.

Conversely, **IRL** experiences such as **Dans Le Noir** in London focuses on removing sight by blindfolding customers throughout the meal which is served in the dark to overstimulate and heighten the others.

933.3Bn  
views on  
**#ASMR**  
on TikTok

(TikTok, 2023)



# 64%

of global consumers say that  
'looking for new experiences  
and sensations that will liven up  
everyday activities is extremely  
or very important'

(Kantar Global Monitor, 2023)



## Embracing the unexpected

Tapping into different senses is a great way to unlock new experiences and transport consumers out of their comfort zones, especially when for alcohol, drinking is no longer a linear experience and fragmented behaviours are the norm.

From **Marmite creating music** based on research around the intersection of sound and taste, to ice cream brand **Salt & Straw** launching **Culinary Perfumes to spray onto its products** to enhance flavour, brands are disrupting food & bev like never before.

Controversially, **Sushi Kanesaka** in London recently asked diners to avoid wearing scents which might interfere with the senses, highlighting the need for brands to consider how stimulating the senses in unexpected ways can enhance or detract from the experience.

Within the category, **Hendricks' Neptunia Sea Spa & Sip Kit** includes headphones, face masks and scented candles to facilitate a holistic self-care ritual, whilst every cocktail made at **Detroit's Casalita bar** is paired with a scent from its sister company, **Sfumato**, to elevate the taste experience given the inextricable link between flavour and fragrance.

It has become clear that consumers are expecting their experiences to go beyond and looking to provides to provide that much needed sense of hedonism, pleasure and just plain fun.



Conversation mentioning virtual tastings in the UK have dropped

**-90%**

since 2020, with search interest volume related to virtual tastings and online classes dropping

**-73%**

over the last 4 years (CAGR)

(Kantar Digital Analytics, 2024)



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# Chapter 4: Tech Imperative

Technology is now the norm in our daily lives, seamlessly integrated into our routines as consumers and individuals. But this can often be at odds with a category like alcohol, rooted in belonging and the need to feel connections with others in real life.

The pandemic may have sped up tech adoption and forced brands to quickly adapt and digitise, but for consumers, many of these behaviours were temporary coping mechanisms to the world around them. Since peaking in 2020, we have tracked a consistent decline in conversation and digital engagement when it comes to alcohol mentions and searches online such as ‘virtual tastings’ (-90%) and ‘online classes’ (-73%). But while it seems that in 2024, tech may have increasingly less of a role to play in socialisation, when it comes to everyday convenience, personalisation and supply chains it is becoming a fundamental tool for brands to deploy and invest in the long term.



## AI driving unprecedented personalisation

Across many industries, tech is facilitating an unprecedented level of personalisation, leveraging AI and algorithms to generate consumer insights that inspire products and services rooted in actual behaviours and needs.

In the alcohol category, AI is being deployed to help consumers discover their likes and dislikes, as well as add a level of futuristic theatrics to on-trade environments. Announced at this year's **Consumer Electronics Show (CES)**, the **Mixmaster Moodie** analyses a person's mood (angry, happy, sad, neutral, surprised, annoyed and afraid) through audio and visual cues to prepare a bespoke cocktail; **Cecilia.ai** performs a similar action while providing real time sales and marketing analytics.

Online no alcohol brand **Seedlip** is deploying an AI virtual assistant to share recipes and personal product reccos, while **Diageo's What's Your Whiskey?** takes consumers through a short quiz to discover their flavour palettes.



Doosan Robotic's MixMaster Moodie analyses a person's mood through audio and visual cues to prepare a bespoke cocktail.

# Barsys' connected coaster helps you measure the perfect cocktail pour.

## Bringing the bar experience into the home

Our desire for smart and connected living is continuing to increase, as are our expectations of what tech can deliver in the home. The number of active households in the smart appliances segment is due to reach 581.1M globally by 2028.<sup>6</sup>

Experience-driven consumers are showing a growing interest in at home devices that help replicate the experience of a premium drink at a bar. In Chapter 2 of this series, we explored the rise of 'in-speriences' with brands like Guinness launching products to elevate the at-home experience (in this case, with the Nitrosurge which helps drinkers pour the perfect pint).

We're now witnessing a bevy of brands and startups entering this space – from Eurocave (which offers domestic wine preservation and cooler systems), through to Barsys (app-connected cocktail coaster), and Bartsian, a premium cocktail dispenser that has risen in search interest by 36% over the past 12 months.<sup>7</sup>

While at home devices may already be at maturing stage in industries such as beauty, alcohol still feels prone for innovation that feels truly convenient, fun to use, and most importantly, just as good as the real thing (having it prepared on-trade for you). We are closely monitoring this space as it continues to grow.

<sup>6</sup> Source – Statista, 2024  
<sup>7</sup> Source – Kantar Analytics, 2024

# Elevating engagement

Hoping to achieve engagement and ultimately, loyalty from consumers, brands are leveraging technologies to become accessible in different ways – whether it be through facilitating communities or supercharging convenience.

**Crurated** is a members-only retail platform and community for next-gen wine lovers which has experienced 82% search increase over the past 12 months, according to Kantar Analytics. Bottles purchased on the platform are issued an individual NFT to certify authenticity, while a metaverse world allows members to learn about, and discover, virtual wine cellars.

Meanwhile **Spirits Network** is a shoppable channel have provides 24/7 access to programming dedicated to spirits, from shoppable videos to virtual tastings and lessons.

Merging IRL with URL, at last year’s **Coachella** festival **Absolut** brought back its **Absolut.LAND** metaverse platform, this time focused on friendships and connections translating on-premise experiences to the virtual world. Teaming up with friendship app **Vina**, metaverse users could partake in dance battles, socialise virtually and order a cocktail kit to their door step via a digital vending machine.



82%

Interest in digital wine platform Crurated has increased by 82% in the past 12 months.

(Kantar Digital Analytics, 2024)



# Future-proofing supply chains

While technology is often deployed to enhance the customer experience, it is playing a pivotal role in ensuring supply chains remain robust and future ready, no matter what. From production through delivery, R&D and agriculture, leveraging technology is the key tool to sustain a competitive advantage in a constantly changing, uncertain climate.

In the English wine industry, a partnership between **Queen Mary University, Extend Robotics** and wine producer **Saffron Grange** is seeking to develop cloud-connected AI components that will enable robotic automation of general tasks, such as pruning and harvesting grapes. The partnership will also enable the wine producer to remotely monitor crop health, identify and course correct potential issues early on, and ultimately reduce labour costs, emissions and reliance on seasonal migration.

Meanwhile with a vision to transform wine into a \$1 trillion carbon-neutral industry, **Terraviva** has partnered with over 100 wineries to gather data-backed insights to help the industry adapt to climate change. It combines satellite imagery with historical weather and yield data, short- and long-term forecasts and segmentation to deliver more specific insights with the assist of machine learning.

Multinational alcohol organisations such as **Diageo** and its **Fusion incubator** are arriving early in the conversation by growing tech talent through programmes that help them develop new tools and platforms for the future, showing that there is a tangible drive to stay ahead with innovation.



# 5 million

Kantar Analytics reports approx. 5 million mentions in online media related to supply chains and tech/digital in the past 12 months.

(Kantar Digital Analytics, 2024)

**40%** of older millennials are drinking more at home (vs. 33% of everyone).

(Kantar Retail IQ 2023)

**37%** of shoppers are replacing other alcoholic beverages with RTD mixed drinks.

(Kantar Retail IQ 2023)

Searches for no-alcohol alternatives have increased by **49%** over the last 2 years.

(Kantar Digital Analytics 2023)



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Brand Strategy Consultant at Kantar

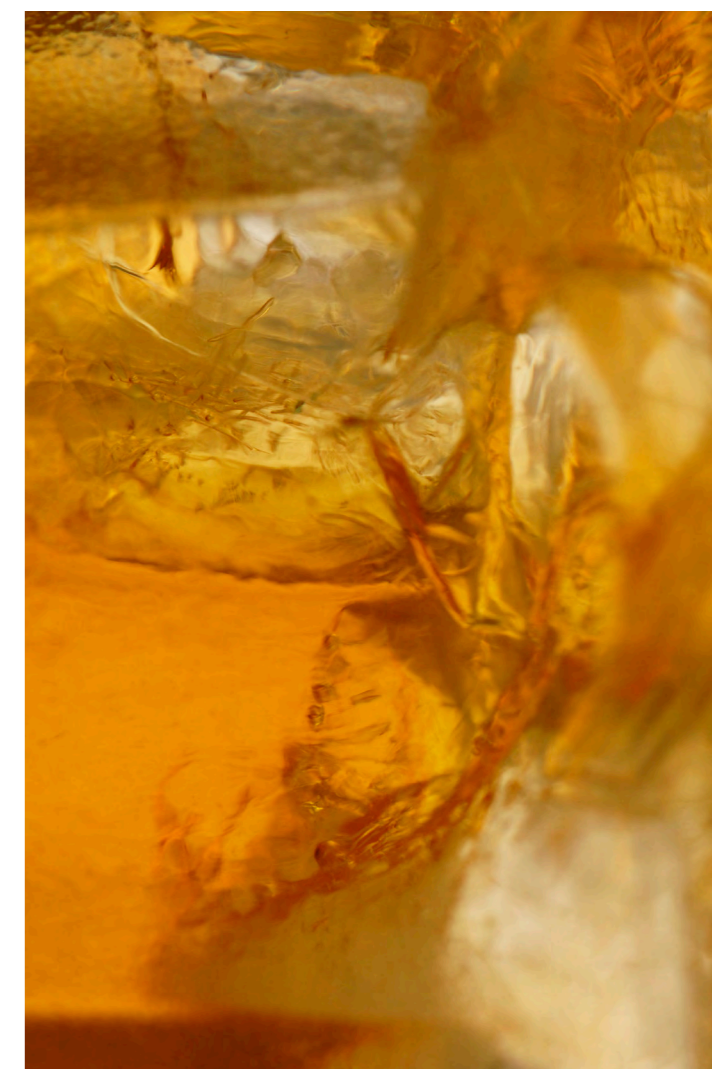
## Chapter 5: Brand

In previous chapters we have explored the trends shaping the landscape, ranging from flexible sobriety to elevated drinking experiences at home; from hedonism to health; from subversive flavours to carefully curated aesthetics; and from tech to facilitate cocktail mixing and choice, to tech to elevate engagement.

### Dynamic markets need dynamic brands

These trends have led to an explosion of new products and new rituals to meet new needs. **Bartesian** cocktail mixers and **Guinness Nitrosurge** are facilitating elevated drinking at home. **Lyre's** non-alcoholic spirits and **Bumble Sober** Dating badges are making mindful drinking permissible and enjoyable. **Malibu** and **Oatly** have opened up new spaces and connected to new audiences with their summertime indulgence collab, the **Piña Oatlada**. And wherever you look, there is now a tantalising array of **RTD cocktails** catering for moments of on-the-go hedonism. Demand for these affordable indulgences also offers brands opportunities to premiumise.

To stay timely and unlock growth, alcohol brands are having to navigate all this change with the skill and agility of a Beat Saber pro, constantly seeking ways to evolve in sync with changing demand and culture.



The danger is that in pursuing the zeitgeist, brands stray too far from their own values or heritage. This can make brands blend in, appear generic, or worse, be perceived as faking it. **How do alcohol brands avoid this?**

# Prioritise Meaningful Difference

Kantar data shows that brands seen as Meaningfully Different have a real edge. They predispose more people to buy the brand more often, in more places, and for a higher price.

Being Different is about creating brand memories that separate your brand from others. Kantar has identified four strategies for creating brand Difference:

**1. Lead the way:** Set trends and challenge the status quo, as exemplified by Johnnie Walker<sup>8</sup> who most recently unveiled the world's lightest whiskey bottle.

**2. Create a distinctive look and feel:** Develop a suite of brand assets to reinforce brand identity. Guinness have done this with their iconic quarter white and three quarters black pint which Guinness Marketing Director, Anna MacDonald says they always try to use them in a way that is relevant in people's lives.<sup>9</sup>

**3. Build a clear emotive connection with consumers:** Aperol<sup>10</sup> has built strong associations with their 'sunset state of mind', cueing uplifting socialising and Italian lifestyle. This feeling permeates every level of brand connection from experience to comms. The brand recently brought aperitivo hour to winter apres-ski and piazza and terrazza vibes to the Coachella music festival.

**4. Functional benefits:** Superior qualities that set them apart. Dom Pérignon is recognised for exceptional craftsmanship and the scarcity of each vintage.<sup>11</sup> This exclusivity is reinforced with collaborations with powerful, admired artists like Lady Gaga and Juliet Clovis.



<sup>8</sup> Source – Kantar BrandZ, South Africa, 2023 – Leading the way 121.

<sup>9</sup> Source – Kantar BrandZ, UK, 2021 – Have a distinctive look and feel 147.

<sup>10</sup> Source – Kantar BrandZ, Netherlands, 2024 – Emotive clarity= Strong.

<sup>11</sup> Source – Kantar BrandZ, Japan, 2024 – Superior 129.



# Create consistent connection

Consistency is key to establishing brand Difference. If a brand is showing up in a consistent, congruent way, each encounter reinforces the next and the brand's mental connections in people's brains become stronger and stronger.

**So, how do brands balance the change vs. consistency conundrum? In short, they drive consistent connection.**

The imperative is to master the art of evolving yet staying the same. Staying timely, yet timeless by following three mantras.

- **Keep a finger on the pulse and look to the future.** Find ways to connect across generations and enrich relevance.
- **Be clear on the difference you need to keep consistent.** Define the brand DNA that is not going to change and stay true to taking it forward.
- **Be disciplined in creating congruent connections** across the myriad fragmented brand encounters: from messaging to tonal delivery, to innovation and experience.

## Baileys have mastered the art

Baileys are a great example of a brand that has evolved to find growth, expanding into the 'adult treating' space, while staying true to its roots.

Baileys have enabled mindful drinking and tapped into hedonism with alcohol free options at its **Treat Bars**, reduced calorie **Baileys Light** and dairy-free **Baileys Almande**. The brand has reached new audiences through collaborations with **Carte D'Or** ice cream and **Eurovision**. The brand has also opened up new occasions by tapping into coffee culture through its 4% **Baileys Iced Coffee** RTD cans and its summer collaboration with **Grind**, a B-Corp coffee company, whose cosy, comforting treaty image fits hand in glove with Baileys'. Baileys have leveraged tech in their **Sound Scales** app that uses the sound waves created when you blow over the bottle to determine how much is left. A lovely Baileys way to inspire and reduce waste. In this way, the brand is breaking the boundaries of the business they're in, without losing their 'Baileys-ness' along the way.

**The imperative:** Stay relevant by connecting fluidly with culture, but connect consistently to defend brand Difference.



**60%** of global consumers say it is extremely important to treat themselves to things that give them pleasure, comfort or joy.

(Kantar Retail IQ 2022)

**64%** of global consumers say its very important to 'look for new experiences and sensations that will liven up everyday activities'.

(Kantar Global Monitor, 2023)



# We would love to hear your thoughts.

Understanding consumer needs driving behaviours today helps us predict and prepare for shifts in the future. Through a combination of digital insights, horizon scanning and primary research, Kantar Consulting x Analytics applies a wide lens to observe changes in the world and identify themes which are early signals of tomorrow. This enables brands to future-proof their businesses and ensure they remain relevant and continue to grow in the years to come.

Please reach out if you'd like to find out more:

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