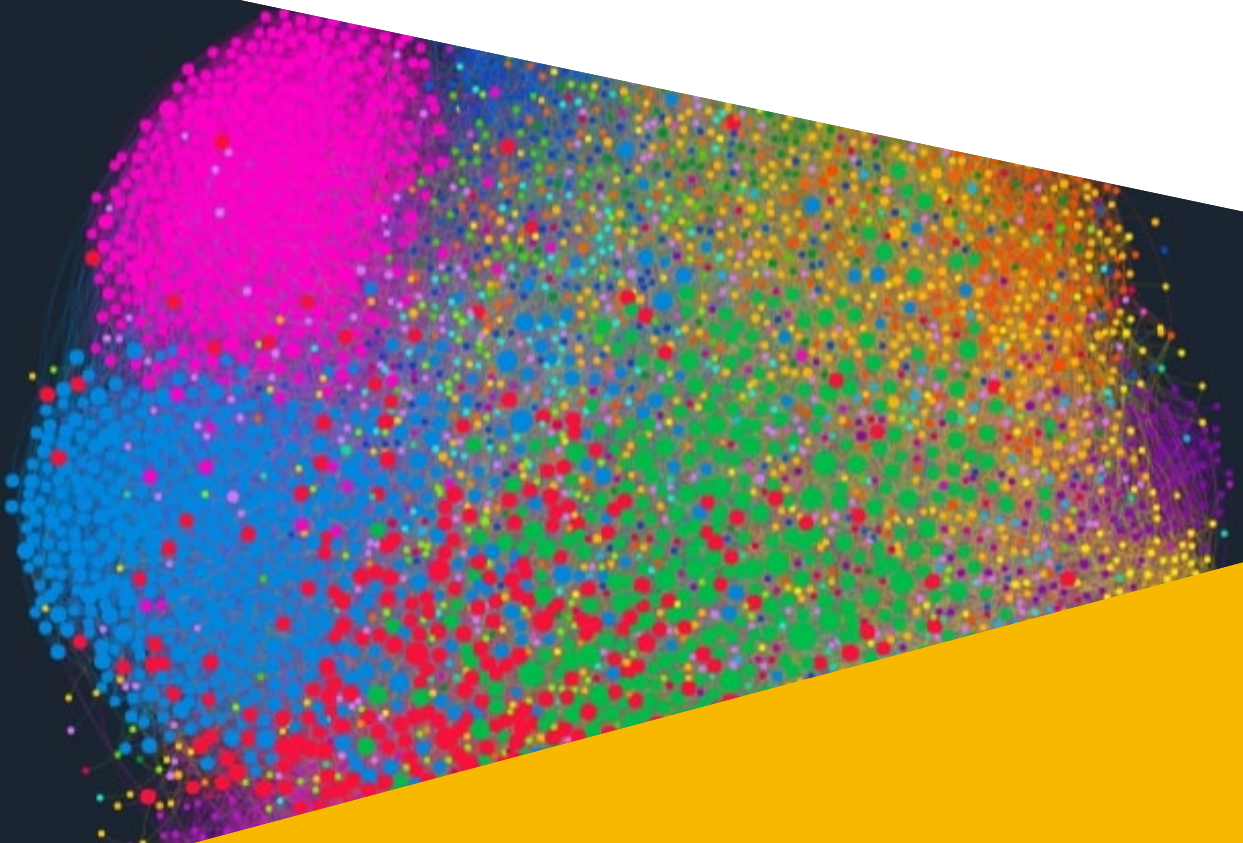




CLUB SODA RESEARCH REPORT

LOW AND NO ALCOHOL DRINK BRAND SOCIAL MEDIA AUDIENCES WITH FIFTY

MARCH 2021



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1. INTRODUCTION

Low and no alcohol has been the biggest trend in the drinks industry in the last few years. The number of adult alcohol-free brands in the UK market has grown from a handful five years ago to hundreds today. Low and no drink sales are growing fast, whereas alcohol sales are stable or even reducing.

There is still much that we don't know about this market though. For example, it's not yet clear who the low and no drink buyers are. Are the teetotal adults the earliest adopters, or do the mindful drinkers pick and mix both alcoholic and alcohol-free drinks?

This study by mindful drinking movement Club Soda and social media analytics and strategy experts Fifty looks at the low and no drinks market from one angle: the social media habits of UK consumers. We will analyse the main segments of the audience for low and no alcohol drink brands, and compare them to the audience for alcoholic drink brands.

2. DATA AND METHODOLOGY

Club Soda first created a list of 81 low and no alcohol drink brands. Fifty.io then discovered all the Twitter accounts (i.e. people) who follow or otherwise engage with these brands. Information on all other accounts these accounts follow and engage with was used to create clusters of audiences with similar characteristics. Analysing each audience in turn based on factors such as users' age, gender, location, types of accounts followed, they were given a descriptive name, and the total number of accounts in each audience tabulated.

The total number of accounts included in this analysis was 3.4 million. 1.9 million (or 55.2% of the total) were clustered into 24 audiences.

As in any analysis of this type, the clustering of accounts into audiences is data-driven, but the naming of audiences is necessarily subjective.

All of the images in this report are from the Fifty.io platform, demonstrating some of the available analytics and data visualizations.

3. RESULTS - LOW AND NO AUDIENCES

The table below lists the largest of the identified audiences (all those with at least 10,000 people) with their audience sizes and the most common words found in the users' Twitter biographies to give a flavour of their main interests.

Audience name	Audience size	Most common bio keyword
Culinary Socialites	474.3K	food
London Millennials	449.2K	love
Digital Millennials	352.9K	music
Craft Alcohol Aficionados	158.1K	beer
Trendy Mums	147.1K	uk
Food & Beverage Industry Professionals	76.3K	food
Sporty Women	25.8K	netball
Health-Conscious Environmentalists	20.5K	love
Pregnant Women	20.2K	blogger
Startup Entrepreneurs	16.0K	business
Keen Gardeners	13.4K	garden
Healthcare Professionals	12.8K	health
Midlands Outdoors Adventurers	12.8K	birmingham
Design Creatives	12.7K	design
Sober Living	10.7K	health
Wellness & Fitness Enthusiasts	10.5K	fitness

A big part of the low and no audience seems to be younger people. The “London” and “Digital” millennial audiences share many characteristics and could perhaps even be considered as a single audience, with a total of 802k accounts (23.6% of the total in this sample).

There are big food and drink groupings. The second major low and no audience is called “Culinary Socialites” (474k accounts, 14.0% of the total), the third and the biggest drink related audience is “Craft Alcohol Aficionados” (158k accounts, 4.7% of the total).

TRIBE	SIZE	RANK	AUDIENCE VALUE
Culinary Socialites	474.3K	1/24	
London Millennials	449.2K	2/24	
Digital Millennials	352.9K	3/24	21
Craft Alcohol Aficionados	158.1K	4/24	
Trendy Mums	147.1K	5/24	
Food & Bev Industry Professionals	76.3K	6/24	23
Sporty Women	25.8K	7/24	30
Health-Conscious Environmentalists	20.5K	8/24	10
Pregnant Women	20.2K	9/24	20
Startup Entrepreneurs	16.0K	10/24	3
Keen Gardeners	13.4K	11/24	

The next three large audiences, “Trendy Mums” (147.1K accounts), “Food & Beverage Industry Professionals” (76.3K), and “Sporty Women” (25.8K) are very specific interest groups. It is perhaps no surprise that “Industry Professionals” are interested in all kinds of drinks, including low and no alcohol brands. And audiences with large numbers of women will also have many pregnant and breastfeeding members who will have an interest in alcohol-free drinks.

The next two audiences, and the last ones of over 20,000 individuals, are even more specific. “Health-Conscious Environmentalists” presumably are keen on lower alcohol drinks as part of their health interests (though many low and no brands are of course also actively working on their environmental credentials). And “Pregnant Women” have an obvious link to alcohol-free drinks as already mentioned.

Finally, it’s worth mentioning one more audience. “Sober Living” has just over 10,000 individuals. This emphasises the point already discovered that low and no drinks are not the preserve of teetotal people only: most of the alcohol-free drinks sold in the UK are bought by people who also drink alcohol.

4. COMPARISON WITH ALCOHOLIC DRINK BRAND AUDIENCES

Fifty also created another database of accounts who follow and engage with alcoholic drink brands, and repeated the same clustering analysis on these 3.27 million accounts.

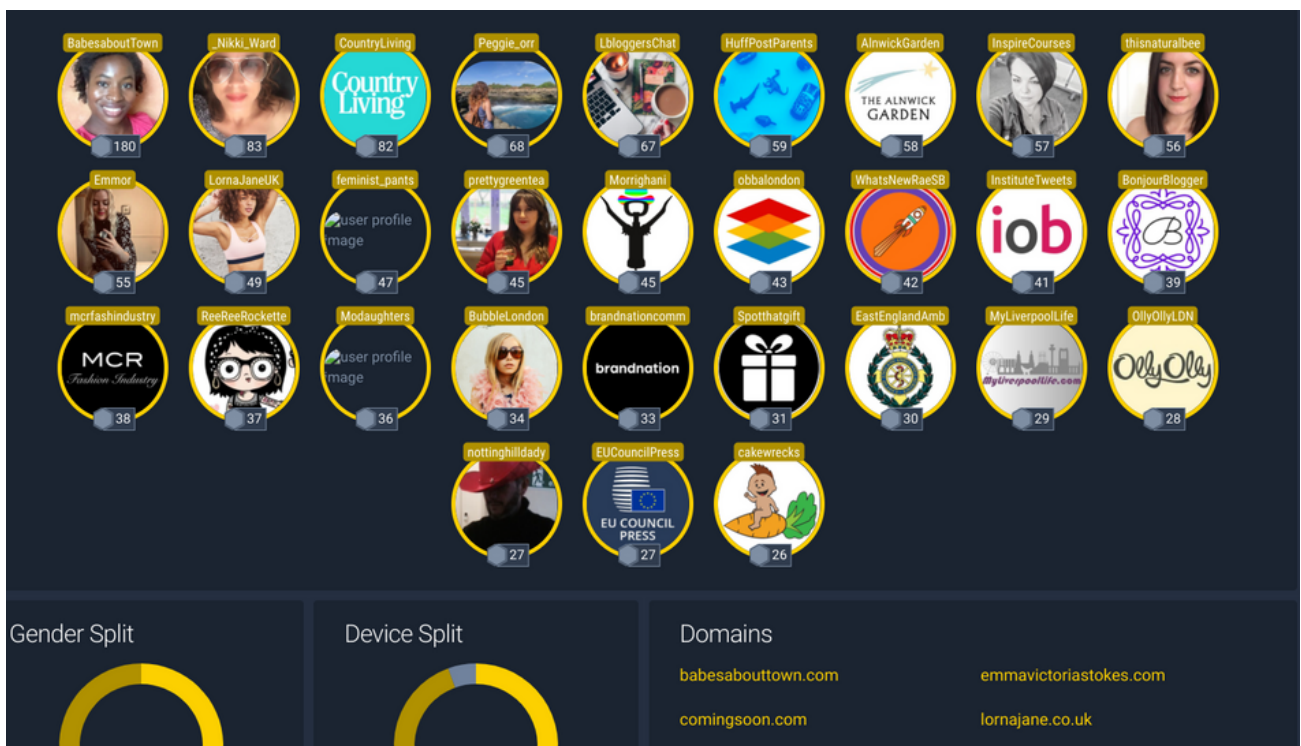
If an audience appears in the low and no study but not in this alcohol brand study, it would suggest that this is not due to a switch from alcoholic to low and no tastes, but rather an “organic growth” of a low and no audience.

There is a much smaller “Millennial Professionals” audience in the alcohol brands study (42.3k accounts) which would suggest that millennials are a newly formed audience for low and no brands.

There are a number of interesting audiences in the low and no brands audience that do not have corresponding groups in the alcoholic brand audience: eg “Health-Conscious Environmentalists”, “Pregnant Women” and “Culinary socialites”. These are therefore indicative of purely low and no brand segments.

The low and no “Craft Alcohol Aficionados” audience seems quite similar to the “Sophisticated Drinkers” alcoholic brand audience; these users have expanded their drink choices to include low and no drinks too.

Three large audiences do appear in both audiences: “Trendy Mums”, “Food & Beverage Industry Professionals”, and “Sporty Women” - these groups seem to have made a switch from alcoholic brands to also following low and no brands. It is not a surprise that “Industry Professionals” are interested in all kinds of drinks, but what is noteworthy is that the audience size in the low and no brands study is only one fourth of the size of the alcohol brand audience. An indication that the drinks professionals are only slowly catching up with the low and no trend?



5. WHAT DOES THIS TELL US?

This simple study confirms that the potential market for low and no alcohol drinks is not limited to small numbers of teetotal or sober curious people. There are large numbers of current and potential future consumers of low and no alcohol drinks, and they can be found in many segments of the UK adult population. Much of this is driven by people who also follow alcoholic drink brands (and presumably drink alcohol!), but there are also segments of low and no drink fans who may never have engaged with alcoholic drink brands.

And what could a low and no alcohol drink brand do with this information? It gives them an easy way of finding their future consumers, for example by targeting their social media marketing at people most likely to be interested in their drinks. The Fifty platform offers many tools to analyse the identified audiences and connections between users.

CLUB SODA

Club Soda is the mindful drinking movement. We help individuals drink mindfully and live well. Club Soda believes that the choice of what you drink is a major part of changing your drinking habits, and promotes low and no alcohol drinks by organising mindful drinking festivals and running our low/no drinks listing site www.clubsodaguide.com.

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FIFTY.IO

Fifty is a technology company focused on large scale analysis of Social Media data to fundamentally redefine how organisations understand and engage their customers. Fifty's consumer insight takes the guesswork out of creating strategy. By diving deeply into the minds of your consumers, Fifty helps you test new product, make marketing more efficient, and take the risk out of new marketing campaigns.

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CLUB SODA

THE MINDFUL DRINKING MOVEMENT

CREATING A WORLD WHERE NOBODY HAS TO FEEL OUT OF PLACE IF THEY'RE NOT DRINKING

Club Soda is the Mindful Drinking Movement. We want to make mindful drinking widely accepted so that everyone feels confident to change their drinking habits if they want to. Society can make this easier by making sure that people who aren't drinking alcohol are just as comfortable as drinkers who are, especially in social spaces where alcohol is served.

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