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Submission of Thesis and Dissertation

National College of Ireland

Research Students Declaration Form

(Thesis/Author Declaration Form)

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Title of Thesis: *Exploring Non-Consumption and Consumer Behaviour of Men Age 25-35 Residing in Dublin, on their Attitudes Toward Purchase and Consumption Within the Non-Alcoholic Beverage Industry.*

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Material submitted for award

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Abstract

This dissertation explores the attitudes, experiences, and opinions that men age 25-35 living in Dublin have towards non-alcoholic beverages, to understand how their path to purchase is affected in social situations. The research statement and sub-objectives were formed after a deep review of the existing literature and theories were explored around this topic. The 'Heineken Now You Can Campaign' provides structure to the research statement, to understand the impact and appeal of non-alcoholic beverage (NAB) advertising. The objectives form a crucial component to support the research statement. This is to greater explore and analyse the findings of this research. Data were collected from eight semi-structured interviews to gather findings and compare them with the literature that was explored.

The researcher is content that this study revealed findings that are informative but also reliable, with the research objective that is primarily addressed. Limitations of the research are noted and recommendations for further studies are highlighted. Findings suggest that health concerns, promotional activity, sports events, and social pressures play a major role in the paths to purchase, or not purchase a NAB. This study expands upon current literature by acknowledging the potential that societal factors hold for consumers and non-consumers of NABs. These findings suggest that a considerable amount of thinking exists behind the reasons for an increase or decrease in sales from each financial year to the next for alcoholic drinks companies that produce NABs, as well as on-trade and off-trade vendors in Dublin.

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Chapter One: Introduction

In this dissertation, the research aims to understand why non-alcoholic beverages (NABs) are not as commonly chosen in social situations where alcohol is also not preferred. It is important to understand the factors or reasons as part of market research, for alcoholic beverage companies, to understand their target audience on a deeper level. This research is carried out in an attempt to help companies better engage, communicate and target their audience while increasing sales in Ireland. This research will be examining men in Dublin that are 25-35 years old.

The researcher seeks to examine the attractiveness of the current NAB market via this demographic. The researcher compares the consumer behaviour feedback from restaurant managers and publicans to ensure that NABs are as effectively positioned around the consumer values and needs as alcoholic beverages are.

The study explores the non-consumption behaviours of NABs to identify areas of disinterest (if any) among men in Dublin. The researcher decided to not explore NAB consumers, as it may incur difficult conversations for people experiencing alcoholism or addiction, that use NABs as a way to stop consuming alcohol in an unhealthy way. Additionally, the researcher did not want to interview people who may be vulnerable to this study and create ethical concerns. To learn how the representative non-consumer demographic views NABs, the researcher looks into the efficiency of the current NAB marketing campaigns. The Heineken *Now You Can* campaign will be the impetus for discussion with non-consumers in this study (Appendix 1).

This dissertation began with an equal interest in academically evaluating theories on consumer behaviour and non-consumption. The researcher believed these two viewpoints to be comparable and could perhaps complement each other. The Diageo Society 2030: Spirit of Progress action plan to promote positive drinking sparked the interest for this study (Diageo, 2022). Recent campaigns that promote drinking in moderation, and address harmful uses of alcohol stand as a timely initiative by the researcher. There are traditional and digital NAB campaigns displayed in Dublin that target a younger demographic (ibid).

Diageo has launched a multitude of multichannel campaigns to promote its NAB range, including Gordon's Gin, Guinness, Tanqueray, and Seedlip (Appendix 2) (Diageo, 2022). The researcher, however, has noticed a particular disinterest in Dublin, despite the creative campaigns. Casually discussing NABs with friends and family living in Dublin, the researcher noticed that the feedback was generally negative, or showed that there was a particular disinterest in NABs. It caused the researcher to wonder:

Why do people choose soft drinks over alcohol-free beverages at social occasions? Is there a stigma about choosing NABs? Are consumers embarrassed? Do consumers not want to be questioned about it? Is it expensive? Does it taste different? Is it just pointless?

Kokole et al. (2021) point out that researchers should explore more low-to-no alcohol consumption trends, as there is a gap in recorded research in the EU and UK (Appendix 3). The researcher wishes to interview those who do not feel engaged with NABs as often as they would with alcohol 'alternatives'. The research aim is to reposition NAB providers, to appear more accessible and attractive to this demographic.

In this dissertation, the researcher investigates the attitudes and consumer behaviour of young men aged 25 to 35 living in Dublin on their views of the NAB market. Using existing academic literature studies, Section Two examines research carried out on consumer behaviour, non-consumption, global non-alcoholic consumption, and significant alcohol corporations' marketing campaigns. Gaps in the literature have been identified, as non-consumer behaviour in NABs in Ireland is a relatively new topic. The research statement and sub-objectives are established after a thorough analysis of the pertinent literature.

Section Three provides examples of the investigation's methods. To address the primary research challenge, this part also identifies the research statement and its established research objectives. The Researcher will synthesize the semi-structured interviews before moving on to the next phase. Data collected from Section Four examines the developing themes. This Section also contrasts the results with the evaluated alternative theories from the Literature Review. Against this background, Section Five summarises the main findings while Section Six discusses the findings against the research statement. Finally, the conclusion will bring this dissertation to a close. Furthermore, the Researcher informs the reader of any limitations of future consumption habit studies, while discussing potential future research areas.

Chapter Two: Literature Review

2.1 Introduction

Beer is one of the most popular beverages worldwide as it produces nearly two billion hectolitres annually. Spirits are the most consumed alcoholic beverage in the world and beer is the second across America and Europe (World Health Organisation, 2014). The alcoholic beverage market competes with emerging health-oriented trends, legislation, religious prohibitions, consumer preference, and demographics. Large alcoholic beverage companies need to increase attention to consumers' health issues and supply the market with novel drinks concepts (Salanță, 2020).

This Literature Review aims to explore the various aspects of NA beverage consumption in Ireland. This will include consumption trends, health effects, innovation, and societal factors. The researcher wishes to provide a comprehensive understanding of current NAB challenges and opportunities that the industry is facing. A range of academic sources, that includes peer-reviewed journals and books will provide a rigorous and evidence-based analysis of the NA beverage industry. According to Zina (2005), a literature review is a core section that is “*a critical review of a body of knowledge, including findings, theoretical and methodological contributions.*” This research will identify gaps to provide insight into the Irish market concerning male consumption and behavioural trends.

2.2 Global NA Beverage Narratives

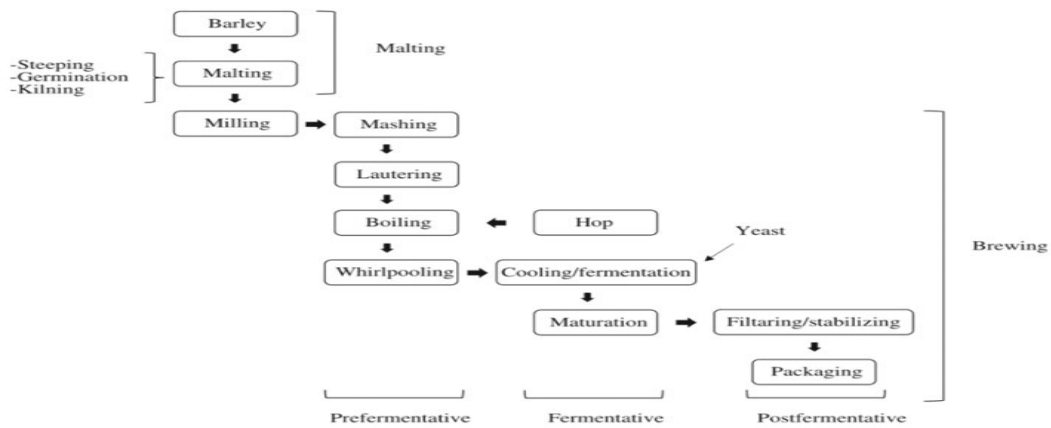
Existing research shows that labelling a low or no alcoholic beverage product reduces the appeal of the product and can harm the expectation of quality and taste. The expectation-disconfirmation model explains customer satisfaction as a function of ‘expectations, perceived performance, and disconfirmation of beliefs.’ It is crucial to adequately market low to no-alcoholic beverage products, so as not to taint the brand image, particularly to an established premium brand (Bucher et al., 2018).

2.2.2 Dealcoholisation

As consumption trends are changing and there is a noticeable increase in health awareness, consumers' drinking habits are changing to seek NA beverages. Although the production rates of NA beverages have increased, it is not easy to confirm how well accepted it has been by consumers (Galanakis, 2019). Due to ethanol being a key aroma constituent for beer, the

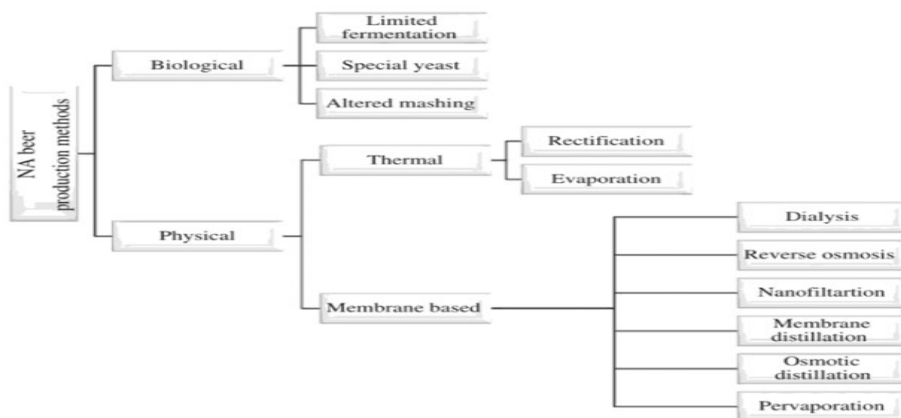
absence changes the sensorial characteristics. Dealcoholisation methods can taint the attractive caramelization, foam, and colour of the NA beers (Galanakis, 2019). Figure 2.2.3 highlights a flowchart of the production of beer, which is typically made up of barely, yeast, hops, and water. NA beer production has advanced significantly, reaching over 2.2 billion litres worldwide. Figure 2.2.4 demonstrates the comparison of NA beer production. NA beer undergoes intricate phases to carry out ‘membrane technology’ including dialysis, reverse osmosis, nanofiltration, etc. to remove the alcohol after fermentation. The entire membrane technology phase is critical to ensure there are no considerable traces of ethanol left in the beverage (Salanță, 2020).

2.2.3 Beer Production Flow Chart



(Galanakis, 2019)

2.2.4 NA Beer Production Flow Chart



(Galanakis, 2019)

2.2.5 Misconceptions

The perceptions surrounding NA beer are a complex combination of expectations. The consumer is somewhat impacted by the colour, flavour, aroma, and aftertaste of the beverage. Sensory perceptions are typically not in the control of the brewer, however, the execution of clever marketing and branding techniques can disguise any suspected disappointment. However, brewers are still working on altering the essence of NA beers to acquire new consumers, as consumers can convey an expected taste or emotion to follow the consumption of the beverage. It is believed that consumers are willing to pay a higher price for premium beers (Salanță, 2020). A recent study showed that the most preferred NA beer possesses tropical, stone fruit, and citrusy aromas (Moss et al., 2022).

2.2.6 Conceptualisation of Beer v NA Beer

The overall sensory experience is associated with a multitude of emotions. Silva et al., (2016) demonstrate responses regarding taste factors from Dutch and Portuguese research participants, who were a combination of alcoholic and NA beer consumers. The authors carried out qualitative approaches to gather feedback from the participants. One participant responded “*Non-alcoholic beer works like a medicinal product. I’m going to drink this because it has interesting health properties but in terms of flavour and taste and pleasure, it’s a remedy when compared to an alcoholic beer*”.

2.2.7 Emotional Response

In terms of emotional responses from NA beer, it was recorded to be more ‘*rational*’, ‘*indifferent*’, and ‘*far from an emotional beverage*’ (Staub et al., 2022). Overall, the difference in conceptualisation between alcoholic beverages and NA beverages narrows down to the lack of emotional response. It means that a NA beer must resemble a beverage independent of alcoholic beverages. A higher tier of congruence among ‘expectation and experience’ could be managed by communicating NA beer in an energetic and convivial way. For example, Heineken 0.0 could make a consumer assume that they will experience disappointment, as they compare it to a regular Heineken, upon consumption. Whereas, the same consumer is not expecting a soft drink to give them the same effects a Heineken would. Thus, the non-alcoholic versions of drinks such as Heineken 0.0 should be communicated as a drink independent of its alcohol-derived brand to diminish the disappointing assumptions mentioned (ibid.). Patterns of NA beer consumption suggest a disappointing experience from

consumers. It develops a general understanding that choosing a NA beer will result in less 'fun'. NA beer has the potential to be an attractive alternative to alcoholic beverages when positioned creatively. The authors suggest that by marketing NA beer, not as an alcohol alternative, but as a stand-alone option when in a social setting, the expectation for disappointment should be diminished (Staub et al., 2022).

2.3 Influential and Non-Influential Factors

Literature containing experimental studies suggests that individuals are typically influenced to consume more alcohol when they are with a person who drinks alcohol. Studies show that peers mirror each other's actions in situations where alcohol is consumed (Larsen et al., 2010).

2.3.2 Stereotypes

Consumers will mentally convey an image of how they are perceived by their peers when choosing something to drink. Choosing or not choosing a NAB can be influenced by subjective norms in an attempt to accommodate peer behaviour. Staub et al. (2022) explain how stereotypes affect NA beer sales, as it has associations with being classed as health conscious, rational, motivated, feminine, and emasculating during social occasions. The authors claim that women proved to be accepted as NA beverage consumers more than men. These stereotypes can largely influence behaviour, especially in social situations where alcohol is likely to be consumed.

2.3.3 Taste

Alternatively, taste and consumer preference could influence their decision to consume a NAB. '*Expected positive outcomes*' from consuming alcohol resulted in a positive influence on drink selection. An experiment conducted by Staub et al. in Germany in 2021, highlights the percentages of adults in Germany that choose alcoholic beer or NA beer in particular situations. NA beer proved most consumed at home and least consumed in Clubs/Parties/Other. The expected positive outcomes mentioned by the authors can be counteracted by positioning NA beer in a similar way to Coca-Cola and other soft drinks (Kokole et al., 2022). The absence of taste factors including bitterness, bite, and aftertaste affects consumers' attitudes toward the general taste of the NA beer.

2.3.4 Impressions

A focus group study in North America conducted by Moss et al. (2022) reports that those who identified as NA beer consumers were typically interested in a healthy lifestyle and most likely to consume in a social setting, but not at restaurants. Another study conducted by Lafontaine et al. (2020) explored the reasons for NA beer interest in consumers. The results concluded that consumers enjoyed it due to their health reasons, being a thirst-quenching alternative to alcohol, abstaining from alcohol for a while, and flavour. In this study, 43% of consumers had not tried NA beer before the survey. This supports that there are opportunities to develop NA beers further in terms of taste, variety, and as a healthy option. The results support market trends that indicate that lifestyle factors are a key influence to purchase NA beverages (ibid.).

2.3.5 Health Concerns

The increase in health concerns is a protruding factor for the influence of NA consumption. Studies suggest that moderate beer consumption has reduced risks of cardiovascular disease, cholesterol levels, diabetes, and dementia due to its valuable source of vitamins, antioxidants, and minerals. Low-alcoholic beers have been developed using alternative methods of brewing. Alternative ingredients such as wheat, rice, maize, and unmalted barley have been experimented with to promote foam stability and explore new flavours. Brewers and retailers commonly aim to improve public health matters for their consumers to deliver NA beers that perform well on the aroma, taste, and texture. Breweries in the late 20th Century were dedicated to (i) increasing the overall production of NA beer by designing new products among competitive markets, (ii) giving beer consumers more options while performing daily activities. This included driving, working, exercising, etc. and (iii) entering into beverage markets where alcohol is disallowed due to religious prohibitions. Since then, the NA market has seen total volume growth of 20% from 2011 to 2016 (Salañă, 2020).

2.3.6 Presumptions

Rodríguez et al. (2021) agree that there is scarce research on the variables that influence NA beverage emotions and sensory expectations. Evidence shows that NA beers are viewed as functional non-hedonic drinks. The authors conducted a study where participants sampled mislabelled NA beers, to which the results concluded that it was the label that induced the negative emotions, and not the beer itself. On the other hand, NA beers mislabelled as 'beer'

received positive feedback with joyous emotions. Various companies have been experimenting with packaging sounds to assess the “*premium-ness*” of a beer. The sounds of opening bottles were seen as more premium in comparison to cans. Moreover, louder opening noises made the bottle appear more premium than quieter ones.

2.4 Off-Trade

Economic theory demonstrates that the increase in the price of off-trade alcohol is in place to reduce alcohol consumption levels in the UK. Minimum Pricing per Unit (MUP) has been implemented in an attempt to slow the health-related risks that arise with excessive alcohol purchasing from off-trade sellers such as Tesco and Sainsbury. This remains the same for low-alcoholic beverages. However, pricing remains cheaper for NA beverages in supermarkets, whereas on-trade stockists continue to raise the prices of NA beverages (Ludbrook et al., 2012).

2.4.2 Global Production

Kokole et al. (2021) found that in 2019, around 1.38 billion litres of NA beer was produced and valued at 1.28 billion euro. It was a substantial increase in the percentage of production and sales compared to 2013 when the sold production volume was 0.59 billion litres and valued at 0.42 billion euro. However, the authors mention that researchers should uncover more information on low to no-alcohol consumption trends by inspecting what the 'key drivers' are behind supermarket sales.

2.4.3 NA Beer Production and Sales Volume

Blackwell, et al. report that there is a lack of naturalistic studies performed to determine the availability impact on the reduction of alcohol purchase and consumption. A higher choice range of NA beverages could grasp the attention of potential consumers. The volume and value-related indicators for NA beer consumption excluded Ireland from its sample, as seen in Figure 3 (Kokole et al., 2022). In a report by Llopis et al. (2021), the authors conducted a four-year experiment UK where it was recorded that purchases of NA beverages increased over time. It was found that cheaper pricing sold more NA beverages and they discovered that NA beverages are less likely to be on price promotion.

2.4.4 Impact of Choice Variety on NA Beverage Purchases

Research conducted by Blackwell et al. (2020) examined how the lack of choice among NA beverages affects the influence to purchase. The authors reported that better choice of NA beverages stocked in supermarkets leads to a higher purchase rate in the UK. The authors conducted an experiment where 808 alcohol consumers in the UK were examined on their choices when presented with a high and low variety of NA beverages and alcohol drinks under low and high time pressure. The results concluded that 49% of participants chose a NA beer when the range exceeded alcoholic beverages

2.4.5 Naturalistic Studies on Availability Impact

The researcher found a current 0.0 promotion on Tesco's Irish website where a 4-pack of Heineken 330ml bottles are on offer for €7.50, or €6.00 Clubcard Price. Guinness 0.0 is being sold for €7 for four 500ml cans. Figures 4 and 5 compare off-trade and on-trade NA beverage pricing found in popular bars in Dublin. The markup is considerably high in comparison to a single can from a store and a single pint from a bar (Tesco, 2023).

More research should be carried out to compare the influence of a customer ordering a new NA beverage in a restaurant versus a bar. This information can highlight consumer behaviour and the influence of branding and brand awareness of premium and non-premium NA beverages. Examples of Off-trade Pricing are seen in Figures 4 and 75.

2.5 Recent 0.0 Innovations & Campaigns

Heineken has promptly adapted innovatively to create an eye-catching and memorable contraption to produce Heineken 0.0 on 'draught' from its latest Blade. This large tap is used as a refrigerated done and does not use cellar space or chilling facilities. It is simply a compact draught dispenser designed to serve premium Heineken without alcohol (Heineken, 2023).

Additionally, Diageo has adopted a similar method to the Guinness Micro Draught. This cutting-edge technology serves Guinness lovers with the beautiful stout minus the alcohol in bars and restaurants all over Ireland. The tap uses an air pump as opposed to a gas cylinder to create the same creamy and desirable Guinness with no added ethanol. This development took two years to develop, but it is now available across 150 countries (Guinness, 2023).

2.5.2 Sensory Profile

The flavour is becoming a leading factor in opposing NA beer, as proved by Silva et al. (2016). Breweries have been working to enhance the sensory profile of NA beer through their innovative product formulations. Blackmore et al. (2022), explain how it has been reported that the impact of psychological perception can be overlooked, as people tend to '*eat with their eyes*'. Consumers are always predicting their experiences based on their environment and the appearance of what they are about to consume. Brewing companies should approach their brewing formulation with taste innovation as the main propriety to drive appeal to consumers.

2.5.3 Heineken

Europe represents 51.9% of total cider consumption worldwide, and beer accounts for 14.3% of total consumption. The Heineken company is present in twenty-two countries with their top two products being Heineken and Desperados. To lever on current global trends, Heineken hopped on the low to no alcohol market. 10% of Heineken's marketing budget is spent on its initiatives to promote moderate alcohol consumption. The price of Heineken 0.0 is similar to the Heineken pricing to appear as a premium NA brand. As the NA beer falls into lower tax brackets, it widens the margins to collect higher profits (Heineken, 2022)

2.5.4 Heineken 0.0 Campaign

Heineken employs strategic partnerships to enhance their ROI on its marketing expenditure. The company is very well-established in sports, music, and cinema. Heineken forms strategic alliances with the sports industry, according to the University of Minnesota: "*48% of the audience at a sporting event would drink at least one beer.*" Heineken uses their marketing alliances to address the dangers that follow alcohol consumption such as its TV and digital campaign with Formula 1: "When You Drink, Never Drive". This campaign has been extended to the end of 2023, allowing it to reach almost 500 million viewers and spectators (Gaspar and Massa, 2019).

2.5.5 Diageo

Diageo is committed to promoting alcohol consumption in moderation while addressing the harmful uses of alcohol at home or the workplace. Diageo encourages consumers to ‘*drink better, not more*’ and deems this as an essential part of its Performance Ambition. The global company is the founder of the International Alliance for Responsible Drinking (IARD) to reduce harmful alcohol use by at least 10% by 2025. Diageo empowers its consumers to make responsible choices with the DRINKIQ platform. Diageo accounts for responsible marketing by setting minimum standards for its advertisements to ensure all activities depict moderate usage and never target people under the age of 18. Diageo launched its “Wrong Side of The Road” campaign live in 24 countries. In particular, the campaign was viewed by over 26,000 people in China in the first four weeks of activation. (Diageo Annual Report, 2022).

2.5.6 Guinness 0.0 Campaign

Diageo’s most recent campaign for Guinness 0.0 encourages St. Patrick’s Day goers to avail of a free Guinness 0.0 for one day only. The company estimate to give away 50,000 pints of Guinness 0.0 around Ireland in participating bars and restaurants, as seen in Figure 6. Diageo’s clever invitation to trial the product can be measured with their CTA metrics from the QR code that users must scan to find their free pint. Diageo launched an associated video advertisement with the campaign called “Make it a St. Patrick’s Day to Remember”. It is the largest promotion of Guinness 0.0 that has been undertaken by the brewer since it was originally launched in 2020, as seen in Appendix 7 (Diageo, 2023).

2.6 Conclusion

The attempts to wholly understand these overarching theories in the relevant field of NA beverages allow the researcher to further grasp a foundation of existing knowledge. The research will bridge the current studies to recognize gaps in the literature. This research will attempt to conceptualise a question to fill a void in the literature and gain a further understanding of the relationship between Irish adult consumers and NA beverages. There is a gap in research produced in Ireland surrounding the factors affecting NA beverage consumption, as well as how the Irish market conceptualises NA beverages as a whole. As

Stivers (2019) points out that alcohol consumption has been historically seen as a stereotype in Ireland, yet fails to include research on the Irish NA beer market in Figure 8. More research surrounding the opinions and experiences of Irish adults must be carried out to fill this void, including if there is still a stigma among men consuming NA beverages.

This Literature Review explores the most important aspects of relative NA beverage consumption including trends, health effects, environmental impacts, and marketing and advertising factors. By examining these themes, the researcher was enabled to shed light on the need for a comprehensive evidence-based approach. This can be carried out by addressing the challenges and opportunities facing the NA industry.

The researcher identified several key areas for further research, including the need for a more in-depth analysis of the latest attitudes and behaviour from men in Dublin. Additionally, the researcher highlighted the need for innovation to promote sustainable alcohol beverage consumption. It underscores the importance of continued research and dialogue as the NA industry continues to evolve and adapt to changing consumer preferences and societal expectations.

To gain a more comprehensive understanding of the NA industry in Dublin, further research will be carried out by the researcher to fill the gap in the existing literature and make informed recommendations and provide valuable insights to increase the NA beverage consumption among men living in Dublin.

Chapter Three: Contextualisation

3.1 Introduction

This chapter aims to gain a concise comprehension of the NA beverage industry by analysing current market research data and publications to present the most current figures and statistics. Furthermore, this chapter will examine the companies that have incorporated a NA beverage range or product in the NA industry. As the research focuses on a global perspective, apparent consumption will be introduced, as data regarding Irish consumption is limited.

3.2 Alcohol Industry CSR

Corporate social responsibility (CSR) refers to “*business practices that help companies manage their economic, social and environmental impacts, and their relationships in areas of influence*”. Alcoholic beverage industries are obliged to perform measures of harmful alcohol reduction, as Babor et al. (2018) explain. CSR has been etched as the last remaining strategy for unhealthy substance industries including alcohol, to present the company in a positive light. The authors sought to compare companies that used CSR to differentiate how ‘doing good’ was making such companies ‘do better’. It was concluded that the alcohol industry’s CSR activities are unlikely to diminish harmful alcohol use, however, it provides a commercial and strategic win, while the company appears to have a public health purpose.

3.3 Non-Alcoholic Beverage Industry

Several policy drivers were derived from Anderson et al. (2020) that included marketing, labelling of low or zero-strength beverages, and price. It was deemed from the authors’ survey that these beverages were marketed in association with occasions suitable for their consumption, such as lunchtime, barbecues, sporting events, etc. The study also found that NA products that used verbal descriptors concerning their labelling had a lesser impact when compared to alcoholic beverage labelling. Finally, concerning price, the authors found that the introduction of ‘minimum unit pricing’ in the UK shifted purchases from high-strength to lower-strength products. This was mainly seen in cider than beer.

3.4 Mocktail Innovation

Lyre's has created a range of crafted non-alcoholic spirits to "*make the impossible possible*". They aim to ensure its consumers can share the same enjoyable spirit and cocktail experience without the added ethanol. The non-alcoholic beverage company ensures this by using inviting aromas, and visuals and paying homage to classic spirits. Lyre's provide consumers with alcohol-free spirits encased in premium packaging to match their premium prices. The website offers alcohol-free spirits, mocktail sets, and no-secco (Lyre's, 2023).

Seedlip is also on a mission to "*change the way the world drinks*" by producing high-quality NA beverages. The company claim to be the world's pioneering NA spirit range and produce three unique blends that are the ideal base for mocktails. Diageo's landing page for Seedlip provides insightful blogs for people in the hospitality industry on ways to incorporate more creative alcohol-free options for customers. Seedlip was acquired by Diageo in 2019 after Ben Branson founded the brand in 2015, addressing the dilemma of "*what to drink when you're not drinking*" (Diageo and Seedlip, 2019).

3.5 Conclusion

By examining the concept of corporate social responsibility within the alcohol industry, the researcher found that while CSR may present a strategic win for alcohol companies, it does not reduce the harmful effects that consumers indulge in. Furthermore, this chapter explored relevant policy drivers that NA companies use to increase brand awareness and market share. Lyre's and Seedlip are two of the leading early adopters of zero-percent-alcohol spirits that non-alcoholic drinkers can enjoy without the cause of a hangover. As the NA beverage industry is continuously growing and evolving, these companies are examples that cater to the needs of consumers seeking a healthier lifestyle. There is a growing importance and potential of the Na beverage industry in the global and Irish markets.

Chapter Four: Methodology

4.1 Introduction

The research explores the concept of non-consumption of NA beverages with a specific focus on men residing in Dublin who are 25-35 years old. As the evaluation of the current literature highlights specific themes and gaps in the Irish market, a comprehensive understanding of the research problem is vital to planning the research appropriately. Therefore, the research topic and objectives will be discussed in this chapter to serve as the foundation for the chosen research strategy. The data-gathering techniques that are chosen will be analysed and discussed. Finally, the researcher will highlight the reasons for the chosen approach and the strategy of how these findings will be presented. Moreover, this chapter addresses the process of the research, as well as the design and limitations to support this study.

4.2 Research Statement and Objectives

It is important to understand the nature and topic of the research that is undertaken. It is also critical to formulating the most appropriate research statement (Malhotra, 2019). Identifying gaps in current literature allows the literature review to serve as a base for the research statement and its objectives. From this, the researcher identified the research statement:

Exploring Non-Consumption and Consumer Behaviour of Men Ages 25-35 Residing in Dublin, on their Attitudes Towards Purchase and Consumption Within the Non-Alcoholic Beverage Industry.

The literature review revealed a significant theoretical gap in the Irish NA beverage consumption market and the cause for particular dissatisfaction with this market. Thus, the researcher aims to contribute to the lack of literature that is available. Linehan (2008) explores the effect that culture has on the effect of purchasing influence, specifically in Ireland. “The traditional Irish custom of socialising in pubs underwent a change in recent years as newer eating and drinking habits prevailed”. It is clear that consumption patterns in Ireland are evolving, but there is a lack of supporting literature on the topic of the NA beverage industry.

Objective One:

To explore the attitudes and experiences non-consumers have toward NA beverages and identify factors that influence any negative beliefs.

The first objective is to grasp a richer understanding of how non-consumers shape their attitudes toward NA beverages. The researcher is interested in understanding why soft drinks may appear more appealing in a situation where alcohol is consumed, but not preferred at that time. As Anderson et al., (2020) mentioned in the previous chapter, some labelling might not be appealing enough to potential consumers. Thus, this research can unravel the reasons for non-consumers attitudes toward choosing alternative soft drinks within a social context.

Objective Two:

To gain insights into non-consumers responses to companies who promote NA beverages through advertisement campaigns, to find how they resonate with current advertising.

Objective two investigates the responses to current advertising campaigns that NA beverage providers are promoting. This objective will support the research statement that the factors that should be influencing purchase behaviours might not be working to the best of their ability. A study by Kinnucan et al., (2001) mentioned that a two-stage Rotterdam model that is used in the United States to estimate the effects of advertising, suggests that advertising does not affect the NA beverage demand. The researcher believes that recognising advertisement patterns may determine the buying patterns and behaviours of the Irish male market with a system such as the authors’.

Objective Three:

To identify how efficient on-trade and off-trade vendors are at engaging potential consumers to purchase a NA beverage product

The final objective is to investigate how it may not be the fault of the market that there is a low appeal of NA beverages. The third objective seeks to uncover how well the on and off-trade stockists are advertising, promoting, upselling, and displaying NA beverage products in their locations. Research is limited in locations in Dublin about the effectiveness of product display promotions on NA beverages. Consequently, the objective aims to identify where stockists are not utilising this industry to push sales.

4.3 Research Strategy

Research studies such as this one, are typically moulded around the subject or a question that must be addressed. Saunders, Lewis, and Thornhill's (2019) seminal study was used to provide an adequate structure to the methodological approach of this study. The author's reputable 'onion' strategy (Appendix 9). Allowed the researcher to create a strategy that supplied a consistent academic foundation of research with the techniques of analysis. The research onion will be beneficial to the progression of the findings within this study. This model should outline a part of the underlying challenges in data collection, its tools, or any analysis procedures (Saunders et al., 2019).

4.4 Research Philosophy

Saunders et al. (2019) suggest that philosophy is a "system of beliefs and assumptions about the development of knowledge". How the researcher views the world is how philosophy is adopted by researchers. With these assumptions, the researcher will underpin the strategy of the research as well as the chosen methods. The authors identify 'positivism', 'critical realism', 'interpretivism', 'postmodernism', and 'pragmatism' as research philosophies. Moreover, Epistemology, ontology, and axiology characterise these on a deeper level (Saunders et al., 2019). Epistemology explores the perspectives of reality by the researcher, whereas Axiology explores how to answer questions in a societal context (Handriana 2013).

Following these ideologies, they can be classified as either 'objective' or 'subjective'.

Saunders et al. (2019) describe objectivism as "assumptions of the natural sciences, arguing that the social reality is moulded by the perceptions and subsequent acts of social actors".

Subsequently, subjectivism emphasizes data-driven research (Hammersley, 2013).

4.4.2 Interpretivism

An interpretivism approach is to understand the way consumers envelope meaning or reach conclusions that respond to their social circumstances. An interpretive perspective is a "critique of positivism from a subjective standpoint" (Saunders, et al., 2019). This means that they are constructing very unique meanings. Despite this, it is argued by Bryman and Bell (2015) that "interpretivism is concerned with understanding human behaviour and action". This is an opposition's standpoint, with an understanding that humans are influenced by particular situations within their social environment.

The researcher believes that this standpoint is apparent in this study, as people are dictated by their social surroundings when faced with decision-making in a social context (Sanfey, 2007). The researcher is exploring why non-consumers do not wish to order NA beverages in a social context to understand if a stigma or embarrassment factor is diminishing the appeal. Interpretivism seemed like the most appropriate option to efficiently carry out this research. Interpretivism is dependent on ‘meaning-oriented’ approaches. For example, semi-structured interviews and focus groups are replied heavily on interaction between the researcher and the individual (Antwi and Hamza, 2015).

An interpretivism approach allowed the researcher to suggest and explore topics of interest. Consequently, interpretivism supports this research entirely. The interpretive paradigm concerns itself with observation and interpretation. The ‘interpretation’ element suggests to the researcher that collecting and observing information is required to draw meaning and understanding of the results obtained (Appendix 10). The research will be enabled. To conclude, the semi-structured interviews were used to find deeper meanings behind the attitude and opinions of non-consumers of NA beverages. The results will allow the researcher to wholly understand how marketing teams in alcohol companies can better attract these non-consumers in the future.

4.5 Quantitative vs Qualitative

Saunders et al. (2019) have defined quantitative data as “research that examines relationships between variables, which are measured numerically and analyzed using a range of statistical and graphical techniques”. However, Park and Park (2016) mention that the quantitative method seeks to understand, estimate and control phenomena by applications of measurement and evaluation of findings, which can become generalised. Quantitative research concerns itself with the measurement of quantity on a particular idea that is transcribed into a set of numbers and figures in chart, graph, or table formulation. Payne and Payne (2004) understand that quantitative approaches are the root of the positivist research philosophy, which sought to uncover any correlations or similarities among facts and how it aligns with previous research results. Antwi and Hamza (2015) express that quantitative research is related to “cognition and behaviour” in a way that is highly predictable and explainable. Researchers may find “cause-and-effect” correlations in an attempt to formulate predictions or

generalisations. Despite this, Saunders et al. (2016) believe that quantitative research strengthens the validity and measurability as well as diminishing researcher bias via the data-gathering process.

The alternative method, using a qualitative approach is set to understand a phenome as opposed to defining it. Malhorta (2013) has described qualitative research as “an unstructured, exploratory research methodology based on small samples that provide insights and understanding of the problem setting”. This sort of approach is focused on observation and data interpretation. This type of research allows the researcher to delve deep into the results to uncover more rich data that is comprehensive and used in an attempt to understand desired topics on a deeper level among a particular sample size. Antwi and Hamza (2015) offer that when there is not enough research available in the current literature, this method is the most appropriate. Typically, this sort of approach is required to understand anecdotal experiences related to a particular topic that the researcher is aiming to comprehend. This can be carried out verbally or with the aid of visual cues and open-ended questions. This type of data is more easily accessible in comparison to quantitative data. (Park and Park, 2016).

It is clear that quantitative and qualitative methodologies have their strengths and weaknesses, regardless of the approach. Limitations arise in subjectivity where the researcher fails to detach their experience from those interviewed. Moreover, having smaller data samples among quantitative-driven results may generalize the results and not have an accurate representation of the entire population (Harry and Lipsky, 2014). In contrast, qualitative data may also be a generalisation to the population of a larger sample size, due to its significantly smaller scale. Quantitative data contends to allow for easier measurability and reduction of bias during the data collection. Furthermore, quantitative data can fail to provide deeper insights into the data collected. This method does not always come with an explanation of the results and is closed off for interpretation. (Rahman, 2020).

4.5.2 Rationale for Choosing Qualitative

To reach the maximum potential for the research of this study, the researcher must choose the most appropriate design. This research study focuses on the non-consumption and consumer behaviour of NA beverages in the male Irish market. Thus, individual perspectives must be obtained for this study. Qualitative research is used to explore the behaviours and attitudes

that will allow the researcher to explore in depth in this particular field of research and to extract emotions during the procedure (McGivern, 2006). The researcher aims to adhere to this approach due to the obvious gaps in the Irish non-consumer NA beverage market. This approach is optimum for the researcher as there is an opportunity to ask open-ended and broad questions to explore attitudes, perceptions, and experiences. Furthermore, this approach was the most suitable to deep-dive into the perceptions of NA beverages from the individual participants. Using open-ended questions allows the researcher to explore the answers further, by comparing opinions from other respondents to form themes. The researcher can obtain rich data in small clusters and work with the collected responses more efficiently, as opposed to finding hundreds of qualifying respondents to answer surveys, with no room for flexibility or anecdotes in the responses.

4.6 Research Design

Saunders and Tosey (2013) express that selecting the most efficient research approach is crucial to evaluate the information that the researcher wishes to present. Consequently, the researcher should decide whether to use a qualitative or quantitative approach for their research (Malhotra, 2019). Choosing the right approach would influence the type of data to be collected and how it is analysed. Saunders et al. (2016) show the importance of how the philosophy, strategy, and aims impact the research methodology that is adopted. This results in the researcher ensuring that there is a clear path as they define the topics and objectives with the most efficient resources (Appendix 11).

4.6.2 Rationale for Chosen Design

Using existing literature allows the research objectives of this dissertation to be met, by comprehending existing insights into perceptions and attitudes toward NA beverages in the Irish market. It is vital for the nature of this study, that the participants engage in subjective and prompting information to explore their feelings and attitudes, appropriate for the study. This resulted in the researcher using a single-method qualitative study (Saunders et al., 2019). The semi-structured interviews let the researcher explore detailed data, insights, and opinions on the behaviours and anecdotal experiences of the participants. This approach allowed the participants to speak openly and honestly and discuss in-depth conversations with the researcher. This particular strategy gave insight to the researcher regarding the effectiveness of NA beverage branding, packaging, advertising, appeal, and perceptions. Thus, the data

collection method for this study will be semi-structured interviews. The researcher aims to find a minimum of five themes to conclude the study. The themes expected to be concerned with health, price, and societal factors – such as ‘being the only one’. These themes will help the researcher focus on the problems that are arising and preventing on-trade and off-trade sales in Ireland.

The researcher decided that using semi-structured interviews would allow the respondents to openly express their beliefs, attitudes, experiences, and opinions without any bias or pressure by not involving other people in the conversation. This method of collection allows the interviewer to carve a loose path of how the conversation would flow, while leaving space for the respondent to have a genuine and natural conversation. This particular method is better suited than a focus group, as the researcher does not want respondents to be influenced by their peer’s answers. The researcher wants to gain a true representation of their target group and believes that interviewing people one-on-one would allow the single respondent to speak without fear of judgement or skewing results.

The researcher hopes to gain rich feedback by using open-ended questions. The researcher can prepare the questions before the interview to ensure that the conversation does not stray, and no that questions are left unresolved. The researcher can also ask to clarify, elaborate or rephrase any unclear answers. The questions are specifically designed to be open-ended, with a request for any anecdotal experiences if possible. This is to allow the respondent to speak from experience in an emotional response, rather than a rational response.

For example, did the researcher wants to avoid the respondent answering what they ‘think’ they should say, but perhaps speak from a time when they were offered a NA beverage, and reasons they refused it at that time. Each of the respondents' feedback will be grouped into themes, to find commonalities among the target group. The themes will represent factors that influence or de-influence purchase behaviour of NA beverages from men in Dublin.

4.6.3 Sampling Strategy

Once the researcher decided to use a qualitative methodological approach for this study, they followed a sample strategy in order to interpret data accurately. This is done in order to avoid the dilution of findings (Saunders et al., 2019). Malhorta (2017) mentions that a sample is “a

subset of the target population chosen to participate in the data collection process". Sampling is used to reduce the time it takes to gather large data collection groups.

By selecting the sample, the researcher is exposed to rich data in smaller amounts and avoids becoming overwhelmed with too much data to interpret or analyse. Additionally, it adds to the importance of the sample's willingness to go ahead with participation and the ability to communicate experiences and opinions articulately and expressively (Patton, 2022).

For this study, the researcher will choose someone of the same target demographic, whose responses will not be used for the study. This is to see that the pre-prepared questions flow naturally in the semi-structured interview. The researcher wants to ensure that the questions make sense when verbalised, and that they are easily understood by the respondent, with the absence of academic jargon. The researcher wants to time the interview to ensure it does not run too long or too short. Finally, the researcher wants to ensure that all of the questions that are asked lead to answer the objectives of this research.

4.6.4 Participant Selection

Due to the nature of the research and its contextualisation, there were natural inclusion and exclusion criteria involved when selecting the most appropriate participants. The inclusion criteria are related to specific characteristics of the target group. This can include geographic, demographic, psychographic, or cultural factors. Alternatively, exclusion criteria are seen as those who would not fulfil the requirements or attributes to engage with the research (Bryman and Bell, 2011). The following are the researcher's inclusion and exclusion criteria that were developed prior to the study.

It was clear that due to the gap in the existing literature in Ireland, the attitudes and behaviours surrounding the non-consumption of NA beverages intended to be explored. As the researcher explored the NA beverage industry in a consumer behaviour context, the participants were required to identify themselves as non-consumers of NA beverages, who actively would rather have an alternative option at a time when alcohol was being consumed by peers, but was not preferred to the participant. The respondents were specifically males, aged between 25-35 years old who are residing in Dublin, as the researcher noticed a particular disinterest in this demographic. Through a second semi-structured interview, the

researcher sought after bar and restaurant managers to explore the selling and advertising factors of their consumers.

The researcher thought it was appropriate to have participants with mixed experiences where they were met with the choice to consume a NA beverage, but chose not to. In addition, the researcher found it necessary to speak to people in the NA beverages industry who stock or promote the products. Participants that were not eligible for participation were those who heavily engaged in NA beverage options or those who felt any particular personal reason to choose NA beverages as an actual alternative to quitting alcohol consumption. Appendix 12 outlines a self-developed table of interview participants for the study.

McDaniel and Gates (2008) emphasise that smaller sample sizes work best to conduct semi-structured interviews in a short time frame. It is beneficial to use this approach to develop themes from the data and draw conclusions and recommendations for future analysis. The sample for this research offers eight participants a variety of ages between 25-25 years with the same gender and living location, who do not choose to consume NA beverages, for a variety of reasons. This sample selection was used in an attempt to fill the gap in existing research. The names of the participants have been left out to provide anonymity, in conformity with their signed consent forms.

4.7 Data Collection: Semi-Structured Interviews

The researcher conducted eight in-depth semi-structured interviews that ranged from 30 to 40 minutes. The relaxed tone and setting of the semi-structured interviews allowed the researcher to mildly adapt each interview to suit the individual, which in return, resulted in more organic and conclusive findings. Singh (2007), suggests that probing emotional, open, and closed questions should be carried out to obtain feedback for the study and reach the subconscious of the individual.

The interviews with the non-consumers begin with the participant describing their previous encounters with NA beverages, followed by a brief explanation of why they choose to actively choose alternative beverages. The researcher also wanted to know prior to the discussion, which NA beverage brands they could casually recall. This allowed the researcher to adapt and change some follow-up questions to relate to each unique experience. The

interviewer took notes during the interview to remember any key points they wished to revisit and probe further questions if applicable for further discussion. Voice recordings were taken of each interview to aid the researcher when transcribing the process to amplify the accuracy and reliability of the recorded data. The transcribed interviews let the researcher make basic summaries and findings from the main points addressed and discussed during the interview (Saunders et al., 2009).

4.7.2 Stimulus Material

After confirming the participants' relationships with NA beverages and their familiarity with particular brands, the participants were assigned an interactive task, which formed the basis of the interview. For this study, the 'stimulus' serves the Heineken 'Now You Can' campaign. The 'organism for this study represents the participants' emotional responses and attitudes toward NA beverage brands. The 'response' will represent the behavioural responses to their perceptions and feelings towards NA beverage products.

The task involved participants watching a thirty-second advertisement from Heineken's 'Now You Can campaign'. As discussed in the contextualisation chapter, alcoholic beverage producers such as Heineken have a corporate social responsibility (CSR) for the interest of their customers. Having said this, the ad provided for the participant was showing a man in his thirties, consuming what appears to be a regular Heineken. As a policeman shows up, the actor turns the bottle around to show it is a 0.0% Heineken, however, the policeman continues to issue a parking ticket, as he is parked illegally. The ad is a representation of Heineken's continuous commitment to their CSR, with a humorous approach to their NA beers, clearly aimed at the demographic the researcher is interviewing – seen in Appendix 13.

4.7.3 Procedure

The participants in the study were instructed to watch the video and then asked to give some feedback regarding how much they resonated with the ad. The interviewer asked open-ended questions to find out how they think it would impact their relationship with non-alcoholic beer, and how much it would influence them to purchase one. This opened up an avenue of information provided by the participants to explain how effective or ineffective these types of advertisements are for the demographics targeted by Heineken. After this was completed with

each participant, follow-up questions were asked to start the flow of conversation and form a discussion to find answers to the research objectives.

4.7.4 Theme Sheet

Semi-structured interviews welcome the identification of wider topics for discussion as it allows all respondents to openly and willingly comment on the nature of the topics at hand (Bryman and Bell, 2011). Some sample questions and topics were used to carve a path to address the research statement, the objectives, and the particular areas of interest from the evaluation of the current and existing literature. The theme sheet ensures that areas outlined by the researcher before the semi-structured interview were adequately discussed. Saunders et al. (2019) argue that questions and topics that are asked should always be “rooted in theory to counter any subjectivity” from the opinions of the researcher.

The interviewer must predetermined questions with a ‘topic guide’ to help answer the research objectives. The interviewer used this as a prompt while interviewing the participants to guarantee a swift process throughout. The researcher must not go off-topic or veer off, where the objectives of the research end up not being met. The pre-determined questions assist the interviewer to stay on course, with enough room for the participant to feel flexible to give their natural thoughts and opinions throughout (Malhorta, 2008; Saunders et al., 2019).

4.8 Data Analysis: Thematic Analysis

The data analysis is one of the last parts of the research process. To conduct a research study effectively, it is vital to analyse data. The formulation of themes from the data obtained becomes the core basis of qualitative data (McGivern, 2009; Saunders et al., 2019). The researcher’s use of thematic analysis used a particular structure created by Braun and Clarke (2016). The thematic analysis is an identifier for specific themes that were created from multiple various discussions (Blaxter et al., 2010). Braun and Clarke’s (2006) six-step guide to help adopt a thematic analysis approach to guarantee that qualitative interviews were recorded and analysed most effectively. It included being familiar with the data, coding to create a systematic process, identifying themes to cluster codes into relevant points, reviewing themes to check that the themes offer analytical points for the research, defining

and naming themes, and finally writing up the relevant data to extract compelling examples and relate the analysis to the research question.

4.9 Ethics and Biased

Sanjari et al. (2014) share how while conducting qualitative research, it is vital to address ethical issues such as consent, anonymity, and confidentiality before the interview. All participants should be provided with a consent form to confirm that they are familiar and content with the purpose of the study and understand the role that their feedback will play. Furthermore, the consent forms should be held strictly and confidential, for the participants' use only, and to confirm that the participant has agreed to sign off their responses.

As discussed in the qualitative data limitations section, semi-structured interviews may inflict subjectivity. This should be made clear that the researcher attempts to distance themselves from any data obtained from the sample to ensure unprejudiced answers.

4.10 Limitations

The major limitation of the study was using a small sample size for the research. As the researcher completed eight interviews with non-consumers and two interviews with industry managers, the data obtained was rich but was not enough to generalise an entire population. Therefore in his case, the researcher could draw some restricted assumptions about a reduced population. Furthermore, as the researcher is not deemed an expert as an interviewer, with no substantial experience, the process of conducting and analysing interviews proved to be somewhat difficult and time-consuming. Despite these limitations, the researcher proceeds as confident that the objectives of this research study were accordingly answered and the data acquired was honest, accurate, and viable (Rahman, 2017).

Chapter Five: Data Analysis and Findings

5.1 Introduction

This chapter aims to present the most important findings extracted from the primary research that was conducted by the researcher. The data analysis in this chapter represents the results of collecting primary data that was obtained from eight semi-structured interviews. This chapter should explore the data via thematic analysis. The researcher utilized Braun and Clarke's (2006) thematic analysis to discover a range of themes to explore a deep insight to reach the research objectives of this study. The themes in this chapter were curated by gradually combining the axial and selected codes that were derived from raw data, following on then to integrate this data into six concluding themes. Themes 5.2 to 5.5 are derived from the interview with the non-consumer sample and Themes 5.6 and 5.7 are derived from the interviews with the industry managers.

5.2 Social Pressures

A consistent finding throughout the interviews was how the participants felt about particularly not consuming alcohol when surrounded by their peers who were. Several participants noted feelings of awkwardness, feeling left out, missing out on 'the craic', or feeling easily persuaded to drink otherwise. The social pressures that arise when the participants found themselves in situations to not drink found that they would order a soft drink, or go home earlier than usual. Participant One (1) states how he would handle a situation where he was not drinking while socialising with his friends.

"It would not be often that I would refuse a beer on a night out with the lads, but if I had football training or a match on the weekend I would usually just go home earlier than I would typically on a night in the local. In saying that though, I would feel some type of feelings of missing out on the craic that they are having but I would still stay for a while to show my face. And then I'd probably head home."

Participant three (3) shared this view:

"If I knew I didn't want to have a drink that night I don't think I'd go out into town or the likes. Mainly to save money because I know the lads will be enjoying their few rounds and I don't want to be the one ordering a load of soft drinks all night. When I think about it, I don't

like that I would stay in if I am not participating in rounds, etc. but I just don't think I'd have as much of a good time as they are having to be on the same buzz as each other."

Several participants found that when they reflected on their attitudes to avoid alcohol, they were surprised about their responses at those moments. It is prevalent that there are some misconceptions and urges to give in to social pressures, and the researcher believes that although the participants are mature enough to make their own choices, it can still be difficult when put in such a position.

Participant four (4) shared his experiences with a recent night he had where he was participating in not drinking for a month:

"It wasn't hard to not drink for the entire month of February than I had imagined. I don't tend to give in to peer pressure, but I felt like having an ice-cold pint on a Friday after work with my friends. I don't think my friends pressured me at all, I think it was more in my head that I looked like the odd one out because I was drinking mocktails or sparkling water with lime cordial. I think that raised a few more eyebrows than anything else haha. I think I had the odd 00 but I didn't enjoy it enough to drink it all night."

Similarly, participant two (2) found it easy to be around their friends when not drinking but just assumed other people wondered why they were drinking tea, coffee, or mocktails in the pub. *"I didn't care to not drink, I just love having a coffee or tea in the evening so I thought it was a good time to have it when I wasn't drinking one night with the lads. I'm sure it might have looked a bit strange but my friends didn't care."*

The researcher found it interesting and surprising that the participants were worried about what strangers were thinking about if they were not consuming alcohol more than what their friends were thinking. It was interesting that although there were some feelings of exclusion, awkwardness, or embarrassment, the participants would still not order a NA beer to 'appear' to be drinking alcohol.

Staub et al. (2022) remark on the patterns of NA beverage consumption to understand that consuming a NA beverage will result in the expectations of having less 'fun'. It is clear from the participants in this study, that there was no intent of ordering any NA beverages to feel

more included in the ‘fun’ that their friends would have been having while consuming alcohol. The difference in the conceptualisation between alcoholic and NA beverages was the lack of emotional response while purchasing, opening, or consuming a NA beverage. It was assumed by the research in Staub et al. (2022) study that drinking NA was considered useless if the person wished to have any extra ‘fun’ while consuming it. The research in this study shows how the participants did not feel the need to ‘fit in’ among their friends, but to feel like they did not stand out to the other people in the pub. The respondents did not feel that pretending to be drinking alcohol would i) make them have more fun or ii) make them appear to be having more fun. It appeared that their intention was not to get drunk to feel better in the pub, however, they did not want people around the pub to assume they were ‘boring’ or ‘weird’ for not having alcohol.

5.3 Health Benefits/Concerns

There appears to be a robust theoretical consensus within the literature that contends that moderate beer consumption results in a reduced risk of heart disease, high cholesterol, and diabetes. Thus, NA beverages must be concocted with the same valuable vitamins, antioxidants, and minerals to produce a sustainable alcohol alternative (Salaňă, 2020).

Participant One (1) continued his discussion by mentioning his health-related issues with consuming NA beverages:

“ I think if I did stay out I’d still want to enjoy some sort of beverage so I’d probably enjoy a Coke Zero the most because it has no calories. I think it would be a waste of my calorie intake to drink four or five non-alcoholic pints just to feel like I’m drinking”.

Likewise, participant five (5) mentioned that he usually has stomach issues after drinking NA beverages that lead to bloating due to how ‘gassy’ the NA beer is. *“I try to avoid drinking NA beers that contain gluten. I struggle to find a NA beer that doesn’t upset my stomach – especially if I am out for the day or night. I think Peroni has a gluten-free beer, but I must double check if they have a 0.0 version of it.”*

It became apparent to the researcher that there is a lack of gluten-free NA beverages that are not considered ‘premium’ brands. According to Allsopp (2005), the reasons customers are

engaging with premium markets are becoming more complex. Customers perceive high quality with a high price, and will therefore justify reasons to ‘splash out’ and pay for the more expensive versions of a particular product or service. The researcher, in this case, can justify companies such as Heineken, Diageo, and Pernod Ricard as ‘premium’ beer and spirit producers. Assuming this is true, the NA or gluten-free beverage products produced by these companies should follow the same standard and reputation as their core products. The researcher believes that the same standard of production should be carried out without regard for what other purposes the beverages serve besides having alcohol in them. For example, a low-calorie ‘premium’ brand should have incredible flavour, depth, and a sense of enjoyment when being consumed. The researcher believes that these companies can fall short. As discussed earlier, ‘gluten-free’ or ‘low-calorie’ labelling can result in the public having a negative attitude towards the branding and image, thus assuming it is not going to be nice. If the premium companies do not go over the top to produce a very well-crafted and well-executed alternative version of a beverage, it is poor behaviour and disregard for their consumer market.

Participant Five (5) continued by saying:

“Regardless of my gluten intolerance, I wouldn’t care to trust a non-premium or unrecognised brand. No particular reason I just have more trust in beer brands I am already familiar with. I don’t think I would start experimenting in a situation like that, as I am not a regular consumer. I will probably wait to find a Peroni 0.0 that is gluten-free. Then I might start to become a regular consumer.”

All of the participants mentioned that the lack of NA beers with no perceived health benefit was a major factor in their decision to purchase. As many NA beers on the market are de-alcoholized versions of the original drink, there is no apparent consideration of health benefits, other than an attempt to replicate the taste of the alcoholic versions. The participants collectively mentioned that having a sugar-free, low-calorie, less gassy, or light version of a NA beer would appeal to them more. Participant Six (6) shared this view *“I think we need like a 0.0 Zero - If you get me? Like a Coke Zero, but it’s a Heineken - with no alcohol or calories. I’m sure that would be pretty hard to produce, but that would appeal to me while I am training for my marathon. Also, I think people are very much more health-conscience these days, so I would imagine there is an opportunity to target health-focused people”*.

5.4 Advertising Awareness and Live Sports

A discovery found within the study was how there is a lack of awareness of NA beverage advertising. After showing the participants the advertisement for Heineken's Now You Can Campaign, five out of the six participants could not recall seeing the advertisement before. Despite no recollection, the participants found that the campaign was mildly appealing, but would not encourage them to purchase a NA beer, and had no impact on their relationship with Heineken 0.0 as a product itself.

Participant Four (4) recalled a memory of when Heineken 0.0 became a UEFA Europa League Partner, as seen in Appendix 14. *"That ad reminded me of when Heineken 0.0 sponsored the UEFA League in 2022. I remember because it was Amstel for a good few years before, so it stuck with me when they took over with a non-alcoholic brand. It was a good move by Heineken."* Despite this participant's recall, no other participants could recall any major advertising of NA beverages that were not associated with live sporting events.

When the researcher challenged participant one (1) to recall any other advertising for NA beverages, he remembered seeing an ad that was part of Heineken's Cheers to All Fans campaign. *"I do remember Heineken doing a 0.0 ad during the Champions League, I thought it was a nice ad."* Participant Two (2) also recalled an advertisement by Budweiser during the FIFA World Cup. *"I can't even remember the ad, I just remember seeing a 'Bud' 0.0 and thinking about what that would taste like."* The participants noted that having seen and recalled these ads, it had not influenced them to actively seek and purchase one.

The researcher noticed patterns of interest where the only time the participants noticed any NA beverage advertising was during live sports events, who were sponsors of particular events, or just ads shown on television around the same time as the events. As research by Gaspar and Massa (2019) point out that 48% of the audience at a sporting event would drink at least one beer, proving that fans are very widely exposed to appropriate advertising of NA beverages in these situations. For marketers, it is an (expensive) opportunity to encourage moderate alcohol consumption in this space to enhance their CSR actions.

Participant 3 shared that *"I do notice alcohol advertisements on my way to work, particularly coming through the Malahide Road. There appear to be lots of alcoholic brands using*

billboard advertising heading toward town. Now, maybe some of them were for 0.0s but I didn't realize while I was driving. Some ads for Guinness 0.0 pop up on my Instagram stories too. The only one I can recall at the moment is the St Patricks Day Guinness 0.0 giveaway.”

The research shows that this demographic is highly exposed to advertising of alcoholic brands including Heineken and Guinness. However, there seems to be a lack of engagement and brand recall for other brands such as Peroni, Gordons, Erdinger, etc. that are advertising in the 0.0 range.

5.5 Increased Interest and Accessibility

During the semi-structured interviews, the interviewer asked participants how on-trade (pub/restaurant/club) or off-trade (supermarket) NA beverage sellers might engage more closely with them. The goal was to find out what the main issues were that prevented the participant from becoming a regular consumer of NA beverages. Similarly, the researcher wanted to know what could be done to attract their custom. Participant Five (5) shared that the selection of off-trade providers is better than on-trade in his area.

“The pubs I frequently visit have a poor selection of 00 options available. I have seen the Heineken 0.0 blades and it's pretty eye-catching. I also saw only recently that the Guinness 0.0 is poured from a can. That turned me off definitely, it just doesn't seem like pub etiquette to be served a drink from a can – unless it's a soft drink. I think the look just doesn't match the tone of the pub atmosphere. It feels like buying a six-pack of Guinness cans to have at home.”

Similarly, participant one (1) mentioned that local supermarkets do a great job at promoting the 'Zero Zone' (Appendix 15). *“My local Tesco is usually well-stocked for 0.0s. I think they look more appealing when they are all displayed together and it makes you stop to see what's currently on the market. I like that it's presented invitingly – it would nearly influence me to buy some just to taste some random flavours – like a Kopparberg 0.0 or something for the craic. I would say if bars were stocked more presentably to show the 0.0 options, they would have a higher interest of 0.0 sales”*

The literature stated how the selection and availability in supermarkets do have an impact on sales. Tesco's Club Card pricing reduces the prices of some NA beverages shown in the table of Appendix 4, compared to Dunnes Stores and Supervalu pricing. Research by Blackwell et al. (2020) reported how variety among shoppers impacts supermarket sales, especially for NA beverages, where 49% of participants in the study chose an NA beverage when it exceeded the number of options for alcoholic beverages.

Participant Four (4) commented on the pricing strategies, particularly of local on-trade providers of NA beverages. *"A regular bottle of Heineken in my local is €6.20, but so is the Heineken 0.0. I think that's a bit of a joke. It is extortionate considering that I can probably buy four bottles of Heineken 0.0 in the shop for the same price. It's a big turn off in my opinion. I get the pricing of regular alcoholic drinks, as there is an added alcohol tax. So it is clear that they overcharge customers, hoping that no one would notice. I understand that the pubs come up with their prices to match competition pricing in the area but 0.0 drinks should have some sort of ceiling whereby, just because Heineken becomes more expensive to buy for publicans shouldn't mean that the NA versions increase so much too."*

The study found that all six participants commented on the price of the NA beverages being sold in pubs and restaurants. It is considered to be one of the main reasons why this sample does not have an interest in purchasing them when they are socializing in these places.

Participant Three (3) mentioned that he had previously purchased bottles of Carlsberg 0.0 from Tesco to have at home, but would not consider paying for the bottles in a pub.

Finally, the taste was a factor that turned participants off ordering NA beverages, having tried a variety of brands in the past. Participant Five (5) shared *"More brands seem to be offering 0.0 versions of their original products. I do admire that, but they need to try to match the taste as best as possible so as not to ruin the idea of the drink altogether, For example, I ordered a Guinness 0.0 on St Patrick's weekend when I saw the ad for a free pint, so I thought 'no better time than now to try it'. Unfortunately, I think I received a gammy pint, and it kind of turned me off Guinness for the night. I was planning on drinking alcohol that night anyway, it was just early on, so I gave it a go. I ended up drinking Smithwick's for the rest of the night because the taste just put me off a pint of Guinness altogether. It was bland and watery, I wouldn't order it again anytime soon."*

Participant Two (2) had a similar experience with a NA wine that his friend once brought home. *“I tried a red wine from the Naturo range, and it was just so bad. I don’t know how people enjoy it.”*

Despite this, some participants recalled having Peroni 0.0 before and commenting on the fact that it tasted the closest to the original drink. It was clear from the research that this particular sample would not be interested in ordering NA beverages that were not premium, as they would not trust that it tasted ‘nice’. The sample all admitted that they were expected to only enjoy it if it tasted the same, and was fearful of that not being the desired result. Current literature proves that presumptions around NA beverages can lead to disappointing expectations before trying the beverage. Evidence produced by Rodríguez et al. (2021) proved that labelling and branding affected the perceived taste of participants who consumed mislabelled bottles of alcoholic and NA beverages.

5.6 Promotions

The researcher was interested in discussing how effectively the hospitality industry managers actively try to promote their NA products with promotional activity. Khan (2014) describes promotional strategies as a means to improve product awareness and promote products to potential customers. This can be done with coupons, offers, deals, and pricing strategies or as a method of customer acquisition.

Participant Seven (7) admitted that their bar does not advertise NA beverages very well and that they could define a better effort to.

“Our display for 0.0 is very poor, we've no bunting, maybe the odd Guinness 0.0 beer mat. The Heineken 0.0 beer mat is double sided so that gives us both options, but wouldn't have been by choice. That would probably be the only advertising we have for it. If I am right we don't get offered anything for 0.0 ads. Mainly the beer mats and drip trays or drip mats, and cardboard displays come in but it's always the alcoholic version. Heineken is the best at the 0.0 ads I believe.”

Participant Seven (7) continued to describe the setting in which the available NA beverages are displayed for customers:

“Display-wise - they are mixed in with the alcoholic bottles in the fridges, as the 0.0 cannot come in a keg. We have them mixed in but it does not spot people from buying them. If they can't see them, they'll ask if it doesn't stand out. We have no separate 0.0 freedoms in display in any way. We have two crates of bottles beside the soft drinks, but they get lost there a bit. People usually ask and they're not shy so don't think it puts them off. Maybe we would sell more if they could see it but it definitely ing them”

The researcher probed questions to uncover what other factors may arise for people who want to consume NA beverages. The respondent said:

I don't think many difficulties arise for customers looking for 0.0s unless it's a personal reason. There are so many choices of 0.0s available now, it is just more so who stocks what. We only have three options so that would be a pain point maybe for our customers who come in. I feel like men can encourage their friends to 'have the one' because everyone else is drinking. Some people ask for a plain glass for their bottles, a few drafts, but if getting a Heineken 0.0. on draught, they want a plain glass. They're quite personal difficulties that arise from their personal sil think some people prefer that the drinks come in bottles or cans because of the blade.

The researcher asked how loyal Guinness drinkers feel about the cans of 0.0:

“We have the Guinness 00 surge machine but that is used in conjunction with cans. When people order a Guinness 00 and see me take a can out of the fridge, it can become a bit awkward if someone has never had it before - I think Guinness drinking that are new to drinking Guinness 0.0 would have a hard time adjusting to ordering cans of Guinness in a pub and paying a high price.”

Participant eight (8) admitted to similar experiences whereby, their promotional activities are minimum when it comes to NA beverages. This participant works particularly in a restaurant, and so customers are more exposed to the entire selection of drinks available on premises with the use of menus, in comparison to participant seven (7) who have no menu and do not

offer table service – requiring customers to visit the bar and choose a drink by what is visible to them.

“We don’t promote 0.0 drinks at all. We have a micro draft tap for the Guinness 0.0 people do spot it and ask about it. We used to have Guinness micro draft but we were not happy with the products that Diageo provided, so replaced one tap for 5 Lamps and kept one 0.0 tap. Otherwise, nothing is advertised, just Heineken 0.0 on the menu. Our fridges aren’t on display for customers - table service only.

Finally, the researcher asked participant eight (8) about how menus might influence or hinder sales of their beverages, due to the absence of branding, but added the description of the beverages:

“ I think menus can give a nice description of say an IPA and a person might order it because it sounds appealing. However, if the same person went to the bar and saw the same drink not like the branding and doesn’t know anything about the brand. So maybe yeah it can influence in both ways - not sure which is better.

5.7 Perceived Target Market

The final theme of the research study explored the perceived target market, through the experiences of the hospitality industry managers.

Participant Seven (7) concluded that they would be older, have more disposable income and usually look after themselves in terms of fitness and diet. Participant Eight (8) suggested that it would typically be a male, with his family on a weekend day. He would be dressed well and be trim or sporty. He would appear to be making a good salary and would enjoy a couple of NA beverages while out for lunch.

“Usually if there is a couple within with their kids, one parent will be the designated driver. So they usually decide quickly between them when I come to take their order. In most cases actually, it is usually the woman who says she will drive home, and so she orders the NA beverage.” This supports the theory of stereotyping mentioned by Staub et al. (2022).

Whereby sometimes NA beverages can be classified as rational, feminine, and health conscience. In both cases, where it is usually consumed by a 'fit' looking man or a 'rational' woman, the research suggests that the stereotypes can massively influence behaviour, especially in social settings.

5.8 Conclusion

This section presented the most important findings and analysis that was gathered using exploratory research. Six themes were developed as a result, to answer the research questions and objectives that were pre-stated in Chapter Four of this study. Subsequently, the themes in this chapter highlight the issues surrounding non-consumption habits and consumer behaviours that apply to men residing in Dublin. This study showed the impact that engagement and promotional activities have on this particular target market. Finally, the overachieving theme of the findings is that there is a disconnect between the sample target market and the consumption of NA beverages in Dublin.

Chapter Six: Discussion

6.1 Introduction

This chapter of the dissertation discusses the whole collection of findings that were obtained throughout the study. This chapter is aimed at drawing viable conclusions about the leading factors regarding the opinions and attitudes of men in Dublin around the non-consumption of NABs. Additionally, this chapter will analyse any implications and recommendations of future research avenues in an attempt to build upon the conclusions of this research.

6.2 Objective One

To explore the attitudes and experiences non-consumers have toward NA beverages and identify factors that influence any negative beliefs.

With the increase of health-related concerns in Ireland, it is clear that customers are valuing low-calorie or sugar-free beverages. The sample for the study all concluded that they feel no desire to consume NA beverages that do not benefit their health. Given the broad scope of this objective, the participants all mentioned that they would choose alternative soft drinks in a situation where they did not want to consume alcohol in a social setting. Coke Zero proved to be the most influential purchase in such a situation, due to its zero-calorie, zero-sugar, and zero-caffeine features. Participants also remarked that NA beer would cause feelings of bloat and discomfort after coming to a couple of pints or bottles. Thus, the lack of gluten-free options is deemed a substantial barrier to purchase. There is a lack of perceived benefits to consuming a NAB.

By using themes of social pressures and health benefits/concerns to answer Objective One, the researcher understood that the participants do not contest to questioning why their peers were not drinking alcohol. However, the participants were concerned with others asking about why they were not drinking. Thus, there is more personal pressure that the participants appear to put on themselves than on their peers. However, the main factors that caused disinterest in consuming NA beverages were a result of price and taste. This study further complimented arguments presented by Kokole et al. (2022), whereby the ‘excepted positive outcomes’ of consuming a NA beverage assume poor quality taste concerning the price.

As a result, the author concludes that the participants in the study would care to become consumers of NA beverage products if the price reflected the quality more. However, brands such as Diageo and Heineken should focus on producing better-tasting and lower-calorie products. Moreover, the participants are open to purchasing from premium brands, therefore these companies have the opportunity to acquire new customers by introducing health-related NA beverages.

6.3 Objective Two

To gain insights into non-consumers responses to companies who promote NA beverages through advertisement campaigns, to find how they resonate with current advertising.

The second objective of this study was to understand the effects of current marketing following recent campaigns from premium drinks companies. The researcher aimed to understand the resonance that the target market receives from the campaigns. Gaspar and Massa (2019) reported that Heineken has a strategic approach to targeting their customers by sponsoring major sporting events. The study found that this complemented the research of this study, as most of the participants who did notice any marketing efforts were during the UEFA League and FIFA World Cup. Despite this, it is clear that the participants were not aware of any out-of-home, television, or radio advertising for any NA products. As one participant mentioned that they were aware of particular billboard advertising, however, he could not distinguish if it was for alcoholic or NA beverages.

In terms of resonance, when presented with the stimuli for the research topic, the participants mentioned that they felt that it was aimed at their particular demographic. However, it was clear to the researcher that the participants did not find the ad campaign to have any effect on their relationship or attitude with Heineken 0.0. As a result, the author may conclude that companies should find more relatable and meaningful ways to advertise NA products. Further, some participants reported the campaign advertisements as ‘cringy’ and ‘mildly funny’.

Despite this, with the existing research targeting sports fans appears to be the best way to attract consumers. However, the researcher believes that there should be more strategies to acquire customers when there are no major sporting events on, or during the off-season to appeal to non-sports fans who do not want to consume alcohol.

6.4 Objective Three

To identify how efficient on-trade and off-trade stockists are at engaging potential consumers to purchase a NA beverage product

The final research objective from the Methodology Chapter was to determine if the on-trade and off-trade sectors are making an effort to advertise or promote NA beverages in-store. A study by Blackwell et al. (2020) suggested how the lack of choice results in a disinterest in customers to purchase a product, particularly where alcoholic and NA beverages are present. This appeared to be true as a result of the research when 49% of participants chose a NA beer when there were fewer options for alcoholic beers during the author's study.

It is clear that supermarkets are taking better action to incorporate the 'Zero Zone', to entice consumers to consider purchasing NA beverages before entering the liquor section of the store. The Zero Zone could be something that is implemented in pubs and bars to make the NA beverages stand out. As Participant Seven (7) mentioned that they mixing the NA and alcoholic beverages in the same fridges probably causes a decrease in sales and interest in the NA products available on the premises. The research would recommend that more attention is brought to the presentation of the NA beverage stock to encourage safer and more responsible drinking. As Diageo was mentioned in the current literature as an advocate to support positive drinking with their DRINKIQ initiative (2023), the researcher believes that the company could apply better paths to purchase in bars and restaurants.

The researcher found that the managers in the hospitality industry admit that more promotional activities can be undertaken to make NA beverages more apparent and accessible to the public. Participants Seven (7) and Eight (8) both believe that they do not receive many benefits from the premium companies to promote NA products.

The results of the data show that there are barriers to purchase by on-trade stockists concerning promotional activity as well as product display issues. It appears that the probable cause is a result of the lack of support to advertise the NA beverage products. Perhaps better support for publicans to generate sales would help to engage customers more with consuming NA beverages. As companies carry out CSR efforts, it is clear that there is more focus on off-trade stocks to reduce harmful drinking as opposed to controlling the levels of alcohol intake for those socialising in restaurants and bars.

6.5 Practical Implications

Based on the discussion above, the following implications for alcoholic beverage companies in terms of the development of NAB sales have been identified:

1. **Advertising:** The data analysis indicates that males among the studied demographic are accustomed to recognising NA beverage advertisements mostly during sports events. Therefore, marketers should implement different types of advertising when there are no major sporting events in different seasons to keep the product at the forefront of their minds. This can be achieved by creating an engaging campaign that gets consumers involved – such as the Guinness 0.0 St. Patrick’s Day campaign.
2. **Inclusion:** The research confirms a lack of inclusivity in terms of producing NA beverages that are ‘free-from’ or low-calorie in the premium NAB sector. This illustrates the lack of engagement with potential customers who are coeliac or health conscience. This implication for the companies is essential. A lack of inclusivity within dietary options proves a design justice flaw. If consumers notice the lack of inclusivity for dietary preferences, it may impact a potential consumer’s desire to purchase as a result of negative word of mouth.

6.6 Recommendations for the Industry

Throughout the data analysis process, the researcher was able to identify key findings that might assist the non-alcoholic drinks industry in enhancing their sensory experiences for consumers. The researcher suggests that product displays in on-trade vendors are to work dutifully to make the NAB range stand out better. The publicans should be provided with

efficient promotional signs, packaging, stands, etc. that make the NA products more appealing and influence the consumers' path to purchase. Furthermore, if the brands are considering implementing taps at the bar, that it not be served through a can – such as the Guinness 0.0 micro draught tap.

Additionally, several participants were concerned about not trying NA beverages when they were not familiar with the brand. The companies could provide extra bottles or mini bottled servings to give to on-trade vendors, to get more consumers to sample the product in a busy setting. This would potentially increase word of mouth and provide an incentive to order from a 'new' brand in the future.

6.7 Limitations and Future Research

As with any research study, several limitations were experienced and acknowledged. A prominent limitation of this research was derived from purposive sampling. The researcher interviewed participants that were between the ages of 25 to 35 and were known to the researcher. Selecting participants may have caused further insight to be neglected that is excluded from the used sample. The study had not taken the path of random sampling and so findings should not be generalised to the whole population of this target market. Research carried out in the future should include a more extensive selection of people at random or through snowball sampling.

Additionally, the stimulus for this study did not reflect all advertising that could have possibly allowed the participants to recall other advertisements in the past. Further research should be carried out for NA spirit advertising, or possible alcohol-mixer advertising such as Schweppes or Fever Tree, to explore the effects of NA advertising more thoroughly.

Chapter Seven: Conclusion

This study furthers the understanding of the experiences that males in Dublin between the ages of 25-35 face when not consuming alcohol in a social context. The research statement explored the non-consumption and consumer behaviour of this target demographic to discover their attitudes and purchase intent of NABs. To understand this, the research objectives explored anecdotal experiences from the respondents as well as the effect of advertising campaigns and how on-trade and off-trade vendors try to push NAB sales. The study confirmed that there are contributing factors that de-influence people to purchase NABs including taste, variety, health-related factors, pricing, and availability in supermarkets or pubs and restaurants. The study concludes that when the sellers of the NAB products do not promote them to their customers, there is a decline in interest, and eventually sales.

Through six interviews with non-consumers and two interviews with publicans, essential data on the impact of advertising, promotion, and variety on NABs were identified. The study aims to strengthen the current literature on the factors that cause dissatisfaction or lack of engagement with NABs among this target demographic. Additionally, this study concludes that alcohol brand companies and marketers must proceed creatively and openly when promoting NABs online and offline. This study provides insightful data whereby consumer inclusivity, promotional activity, and wider availability may drive sales in the non-alcoholic beverage industry.

Chapter Eight: Bibliography

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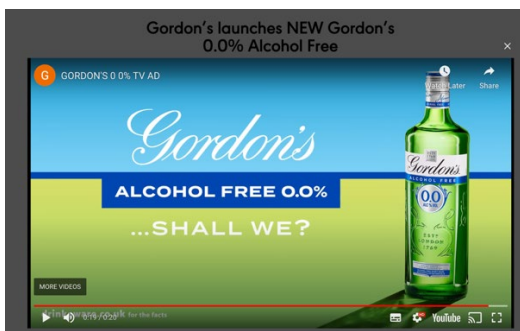
Chapter Nine: Appendices

1. Heineken 0.0 Campaign.



(Heineken, 2022)

2. Diageo: Gordons 0.0 Campaign.



(Diageo, 2022)

3. Lack of apparent consumption research conducted in Ireland.

	Average apparent consumption	Average per capita consumption	Average % non-alcoholic beer as % total beer
Germany	292 465 250	3.5	3.9%
Greece	954 858	0.1	0.2%
Hungary	32 990 049	3.4	4.7%
Ireland ^a			

(Kokole et al., 2022)

4. Off-Trade Pricing Examples

	Tesco (€)	Supervalu (€)	Dunnes Stores (€)
Guinness 0.0 4-Pack 500ml	7.00	7.00	7.00
Heineken 0.0 4-Pack 330ml	7.50 6 (Club Price)	7.25	7.15
Peroni 0.0 4-Pack 330ml	6.50	5.75	5.50
Birra Moretti 4-Pack	7.50 6 (Club Price)	7.80	7.45
Carlsberg 0.0 4-Pack 33ml	6.00	7.50	6.00
Beck's 6-Pack 275ml	5.25	5.50	5.25
Brew Dog 0.0 4-Pack 330ml	7.00	7.00	N/a
Gordon's Gin 0.0 70cl	19.00	17.00	19.00

5. On-Trade Pricing Examples

P = Pint B = Bottle	Lemon & Duke Dublin (€)	Fowler's Malahide Dublin (€)	Café Bar Swords Dublin (€)
(P) Guinness 0.0	N/a	€6.20	5.10
(B) Heineken 0.0	4.60	€6.20	5.40
(B) Peroni 0.0	4.60	N/a	N/a
(B) Erdinger 0.0	5.00	N/a	N/a
(B) Bulmer's 0.0	N/a	N/a	N/a

6. Guinness 0.0 St. Patrick's Day Campaign



(Adworld, 2023)

7. Social Media Ad Guinness 0.0 St. Patrick's Day Campaign



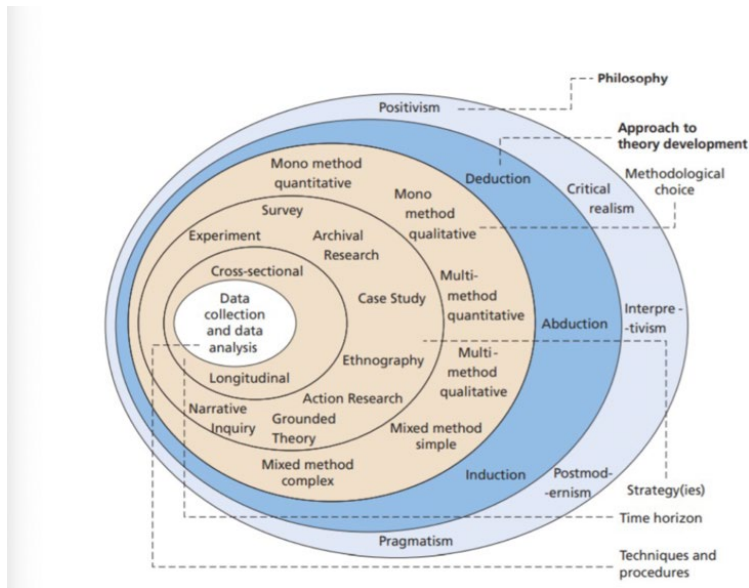
(Guinness, 2023)

8 Gap in Irish NA Beer Volume

	Volume (L)	Value (EUR)	Value per 1 L (EUR)	% Within all EU-27 countries ^a		% Of non-alcoholic beer within all beer	
				Volume	Value	Volume	Value
France	81 012 800	118 632 131	1.46	5.9	9.3	3.8	4.1
Germany	419 781 500	360 508 400	0.86	30.5	28.3	5.0	5.8
Greece	0	0		0.0	0.0	0.0	0.0
Hungary	23 671 000	19 704 749	0.83	1.7	1.5	4.0	6.1
Ireland	:C	:C					
Italy	:C	:C					

(Stivers. 2019)

Figure 9. Research Onion



(Saunders, Lewis, and Thornhill, 2019).

Figure 10. Adapted Characteristics of Positivism and Interpretivism

Positivism	Interpretivism
Quantitative	Qualitative
Objective	Subjective
Theory Verification	Problem Centred
Empirical Measurement	Real World Practice
Empiricism	Understanding
Scientific	Humanist

(Hadadidi et al., 2017)

Figure 11. Adapted Qualitative vs Quantitative Research Methods

Qualitative	Quantitative
Inductive	Deductive
Objectivism	Subjectivity is Accepted/Inevitable
Theory Emerging	Theory Testing
Transformational Knowledge Claims	Hard, Reliable Data
Open Ended Questions	Objectivity is Sought
Rich Deep Data	Numerical Data, Fixed Questions/Approach

(Creswell, 2013)

Figure 12. Self-Development Table of Interview Participants

Participant No.	Gender	Age	Previously tried NA beverage	Actively chooses NA beverage over a soft drink (1= never, 5= always)	Hospitality Industry Manager
1	Male	28	Yes	1	No
2	Male	30	Yes	1	No
3	Male	30	Yes	2	No
4	Male	35	No	1	No
5	Male	25	Yes	2	No
6	Male	32	Yes	1	No
7	Male	28	No	1	Yes
8	Male	31	Yes	3	Yes

Figure 13. Heineken, Now You Can Campaign



(Heineken, 2023)

Figure 14. Heineken 0.0 sponsor of UEFA Europa League



(UEFA, 2020)

Figure. 15 Tesco's Zero Zone

