Gemba

# Low-alcohol beer and wine preferences among sports fans

SPORT & ENTERTAINMENT INSIGHTS

APRIL 2021

# Gemba

Zero-alcohol and ultra low-alcohol beers and wines are the newest entrant into the crowded beverages market.

Brands such as Heineken are using including Football (through sponsorship of the Europa League) and Formula 1 to build awareness and drive sales.

Gemba Insights show that younger sports fans are particularly interested in this category, but barriers exist around awareness and consideration.

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# Non-alcoholic beer and wine is still a relative small part of the market

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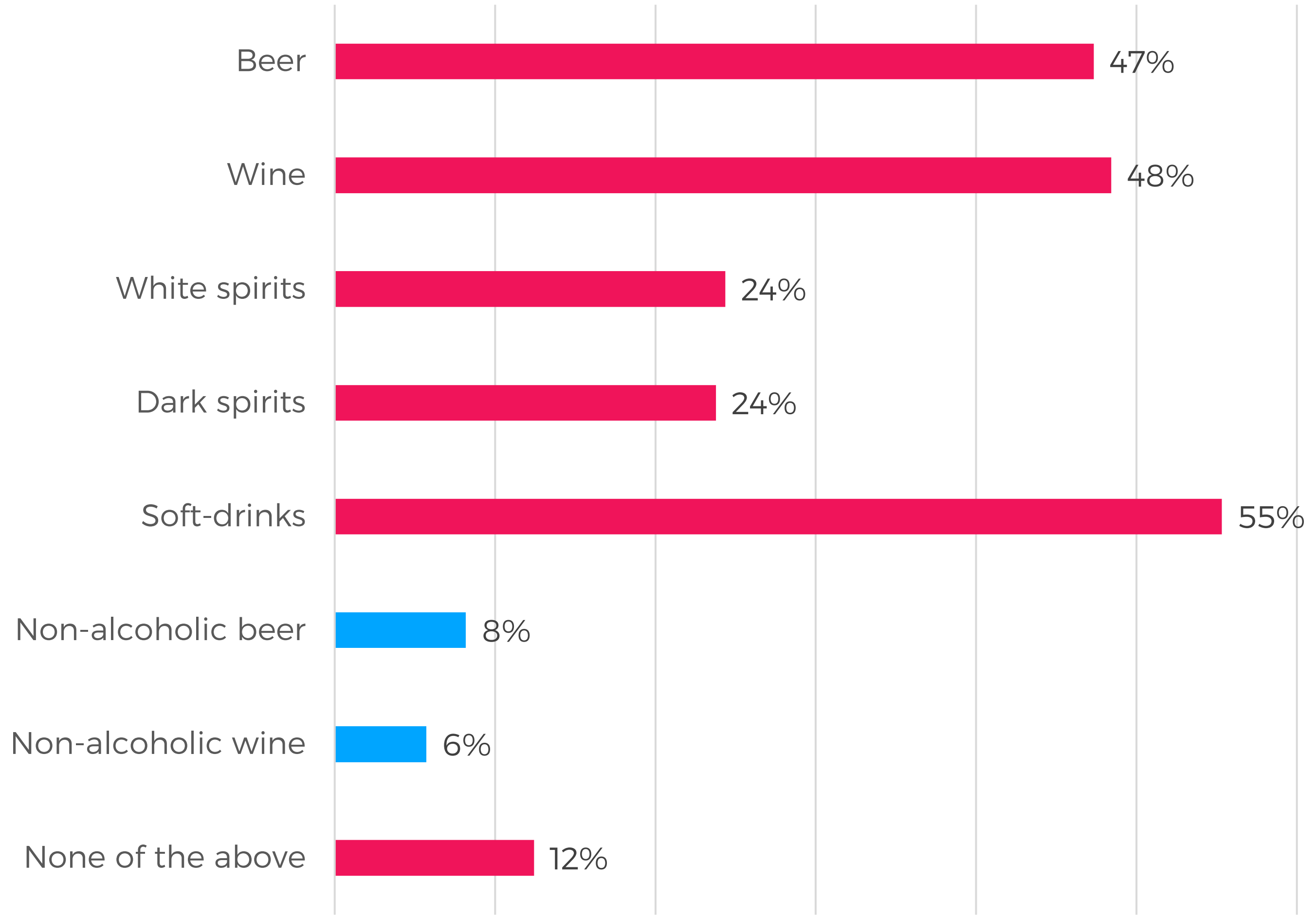
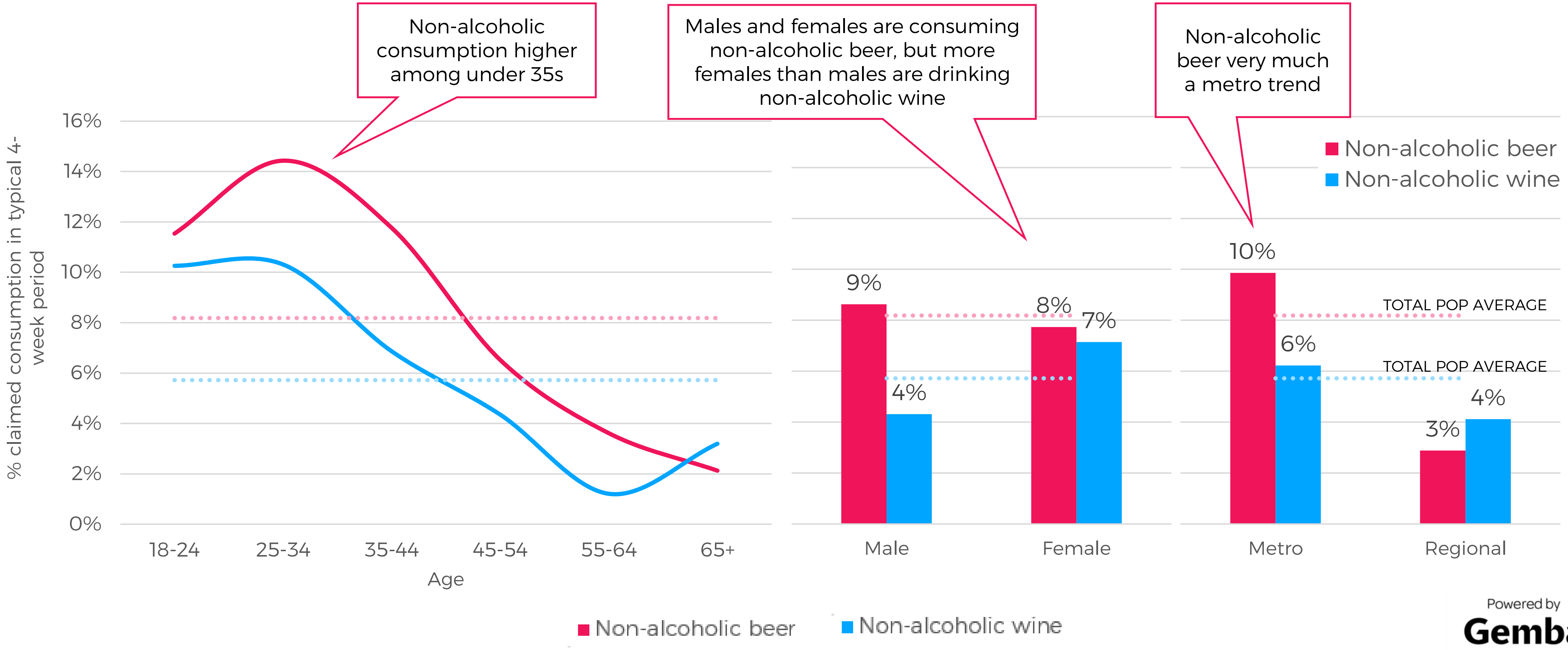
## CURRENT CLAIMED CONSUMPTION (TYPICAL 4-WEEK PERIOD)
### AUSTRALIAN POPULATION




Q. Over a typical 4-week period, which of the following types of beverage do you typically consume?
Source: Gemba Insights, March 2021, n=1.014

# However, non-alcoholic beer and wine is gaining a foothold among younger men and women in metro areas

## CURRENT CLAIMED CONSUMPTION (TYPICAL 4-WEEK PERIOD) | BY AGE AND METRO/REGIONAL




Q. Over a typical 4-week period, which of the following types of beverage do you typically consume?
Source: Gemba Insights, March 2021, n=1,014

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Sports fans in general over-index on consumption of non-alcoholic beer and wine varieties, with Esports, Basketball and Netball fanatics having the highest likelihood of all sports fans to consume.

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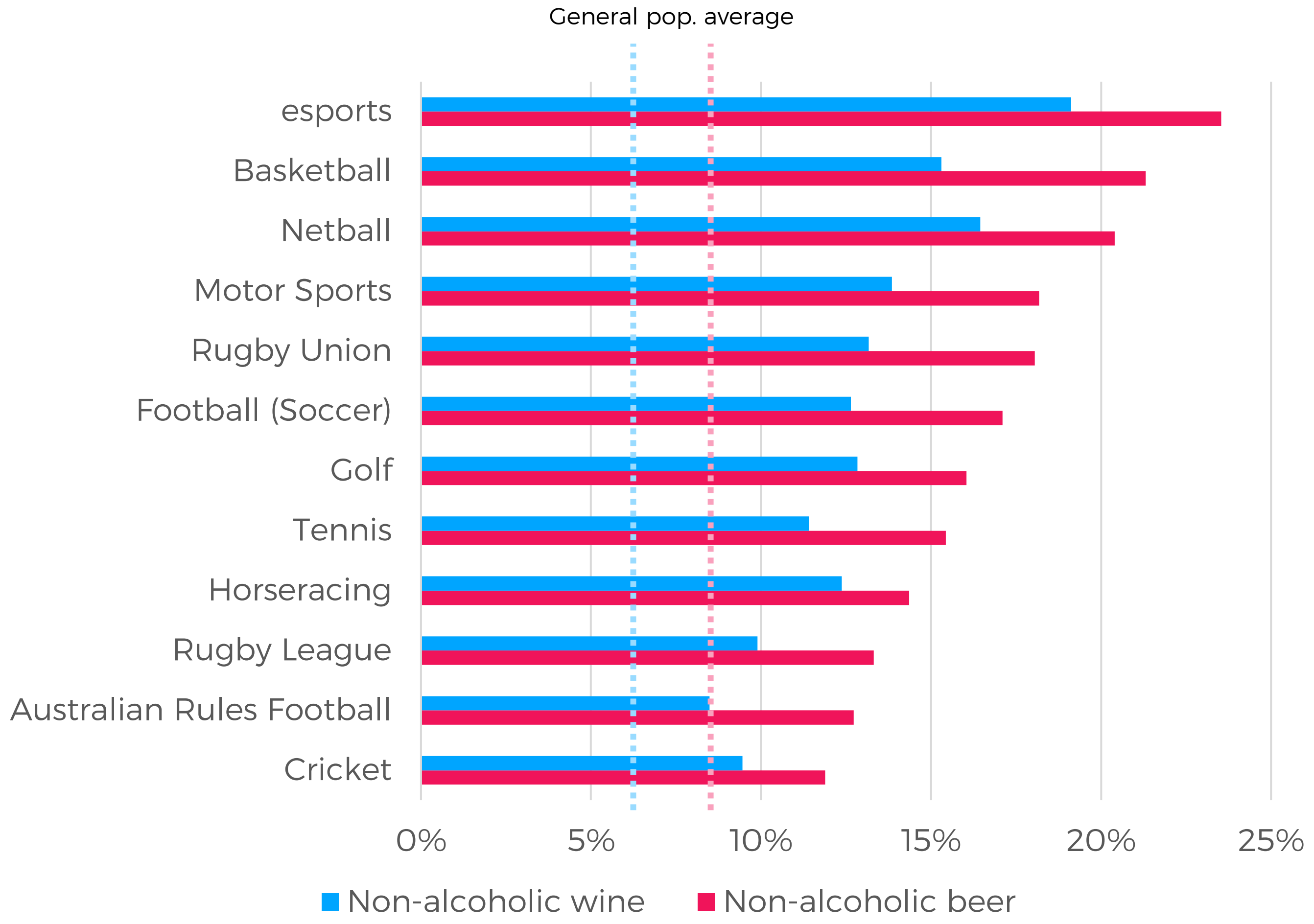
## CURRENT CLAIMED CONSUMPTION (TYPICAL 4-WEEK PERIOD)

### AUSTRALIAN POPULATION | SPORTS FANATICS




Q. Over a typical 4-week period, which of the following types of beverage do you typically consume?
Source: Gemba Insights, March 2021, n=1.014

Awareness, knowledge and consideration of non-alcoholic options are the key barriers to greater uptake.

Will brands look to leverage sport sponsorships and pourage rights at venues to grow the category?

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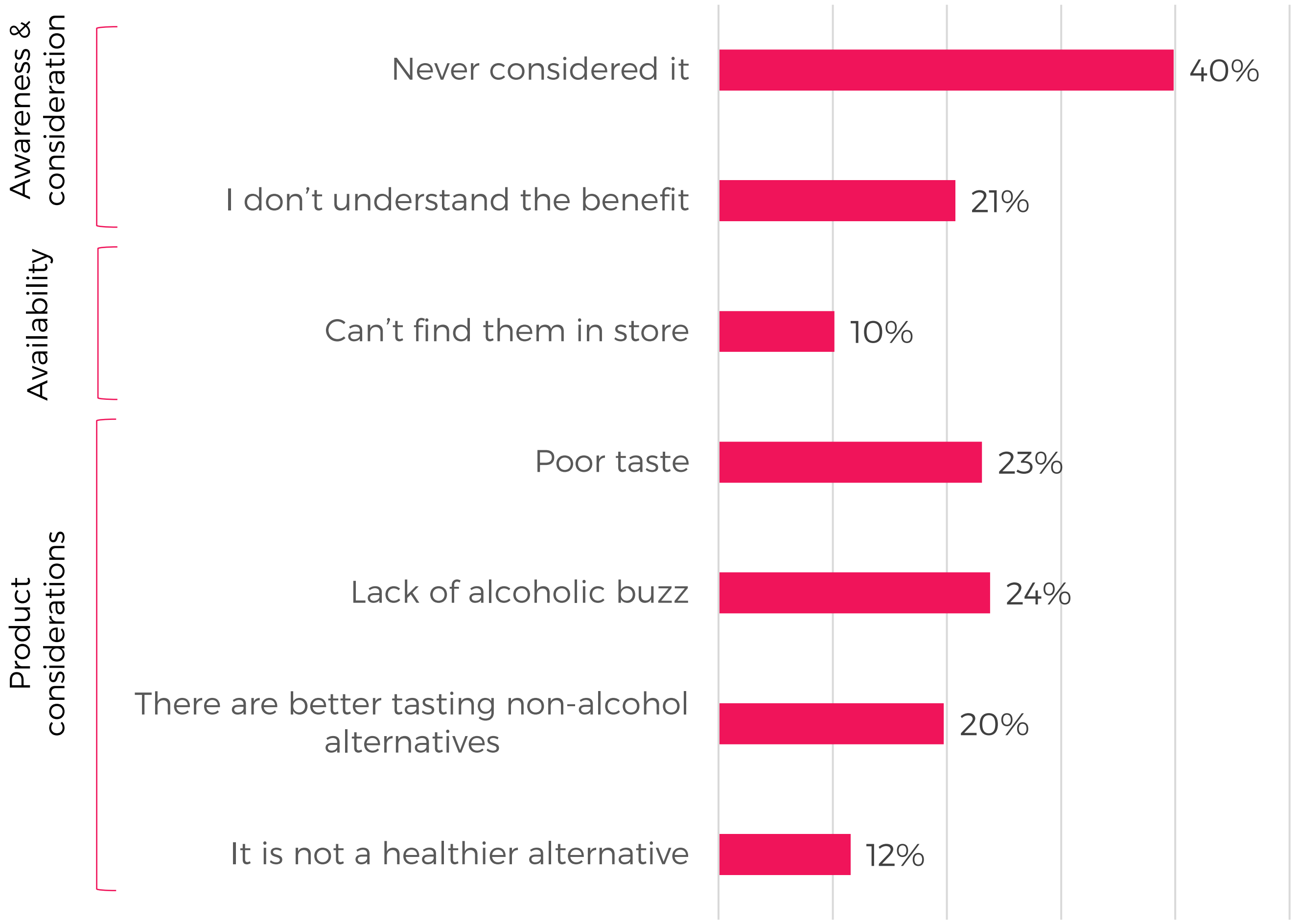
### AUSTRALIAN POPULATION




Q. What are the main reasons you would not consider non-alcoholic beer or wine?
Source: Gemba Insights, March 2021, n=1.014

With the non-alcoholic beverage category growing 12-fold since 2018, its increasing prevalence has the potential to cause issues for rights holders.

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### Normalisation of Drinking

- There are growing concerns around the accessibility for under 18s to freely purchase and potentially normalise the consumption of alcohol
- The potential "gateway effect" of non-alcoholic beverages is also considered to potentially be conditioning people to crave the taste of beer, wine and spirts

### Category Definition

- Soft-drink brands typically lock up all non-alcoholic beverages within an exclusive category sponsorship, leaving beer and wine companies excluded from using their sponsorship channels to promote these products
- The increasing popularity and growing awareness of non-alcoholic beverages will increase competitive tension amongst traditional soft-drink brands

### A Healthy Option?

- There is an ongoing debate as to the overall health benefits of non-alcoholic varieties – many low alcohol beers have higher sugar content than full strength beer, for example

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**MELBOURNE OFFICE**
1/175 Sturt Street
Southbank VIC 3006

**T** +61 3 9526 5700

**SYDNEY OFFICE**
Level 3, 4-14 Foster Street
Surry Hills NSW 2010

**T** +61 2 8020 6550

**LONDON OFFICE**
Chancery Lane: Fox Court
14 Gray's Inn Road
London WC1X, 8HN, UK

**T** +44 (0)7 848 104 130

info@thegembagroup.com

www.thegembagroup.com/insights

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