

RESEARCH REPORT

ADDICTION

SSA

Are alcohol-free and low-alcohol drinks more expensive than regular-strength drinks? A descriptive analysis of sales data from Great Britain, 2024

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Abstract

Background and aims: Alcohol-free and low alcohol [no/lo; $\leq 1.2\%$ alcohol by volume (ABV)] drinks are increasingly popular in some high-income countries and offer potential public health benefits if used as substitutes for regular-strength drinks; however, perceived high prices may deter people from buying these products. This paper explored whether no/lo drinks are more expensive than regular-strength drinks. We compared for no/lo and regular-strength drinks: (i) average prices and price distributions; (ii) prices of products matched on brand and pack size; and (iii) average prices across different multi-pack sizes, container sizes and container types (e.g. bottle vs. can).

Design: Cross-sectional analysis of population-level, off-trade (i.e. shops) sales data.

Setting: Great Britain, 2024.

Cases: $N = 21\,147$ no/lo and regular-strength stock-keeping units (SKUs, e.g. 6x300ml Heineken 0.0).

Measurements: We analysed data from the market research company Circana. Analyses were stratified by beverage categories: beer, cider, wine, spirits and ready-to-drinks (RTDs). Our primary measures were median prices of all products available and median purchase prices (i.e. weighted by sales volume). Prices were per standard serving size for each beverage type. We used quantile regression to test differences in median prices.

Findings: In 2024, the median price of no/lo drinks available was lower than for regular-strength drinks (ranging from beer -19% to wine -44% ; $P < 0.001$), except for RTDs (11% higher; $P = 0.390$). In contrast, the purchase price of no/lo drinks was 7% higher for beer ($P < 0.001$), similar for cider (0.4% difference; $P < 0.001$) and lower for wine (-47% ; $P < 0.001$), spirits (-10% ; $P < 0.001$) and RTDs (-31% ; $P < 0.001$). Top-selling no/lo products were cheaper than matched regular-strength products of the same brand and pack size. For example, 15 of the 17 top-selling no/lo beers were between 6% and 42% cheaper than their regular-strength equivalents; however, the top-selling no/lo products were primarily premium brands, and no/lo beers and ciders were typically sold in smaller, less cost-efficient pack and container sizes.

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Conclusions: In Great Britain, the alcohol-free and low alcohol (no/lo) products available to buy in the off-trade (i.e. in shops) are cheaper on average than regular-strength drinks, but people still tend to pay more for no/lo beer than regular-strength beer and pay a similar price for no/lo cider as regular-strength cider. This discrepancy is partially because no/lo beers and ciders are often sold in smaller, less cost-efficient pack and container sizes. The premium branding of top-selling no/lo products may also contribute to higher prices.

INTRODUCTION

Alcohol-free and low-alcohol (no/lo) drinks are beers, ciders, wines and spirits that contain little or no alcohol, with the standard UK definition including products up to 1.2% alcohol-by-volume (ABV). Rapidly increasing sales of no/lo drinks in high-income countries have sparked debate about the potential impacts of these products on public health [1, 2]. In Great Britain, sales volume increased by 66% between 2020 and 2023 to 1.4% of total alcoholic drink sales [2]. Beer is the largest product category for no/lo drinks and accounted for 2.6% of off-trade (i.e. in shops) beer sales in 2023. However, there is only limited and inconclusive evidence on either positive or negative effects to date [3]. The main mechanism through which no/lo drinks could benefit public health is people substituting their consumption of regular-strength drinks with no/lo alternatives. It is therefore important to consider the potential enablers and barriers to this, which include the price of no/lo drinks, both in absolute terms and relative to regular-strength drinks.

There is public and political debate about the price of no/lo drinks, which consumers and commentators often perceive as expensive and offering poor value for money relative to regular-strength drinks [4–7]. Media reports also often note that alcohol excise duty is not paid on no/lo drinks, as it is charged on products above 1.2% ABV, and therefore argue that no/lo drinks should be cheaper than their regular-strength equivalents [8, 9]. However, other commentary notes the higher production cost of no/lo drinks, particularly the additional and longer manufacturing processes required to remove the alcohol from products [8, 10].

Few previous studies have examined this topic and much of the evidence focuses on the early stages of market development before the launch of the current leading products [11]. Llopis *et al.* examined purchasing data from a quota sample of British households between 2015 and 2018 and during the first 6 months of 2020 [12]. They found the average price paid per millilitre of product in off-trade sales was lower for alcohol-free beers than for regular-strength beers, although the reverse was true for ciders. They also found purchases of alcohol-free beers and ciders were less likely to included price-based promotions than purchases of higher-strength products. A descriptive report by our team found the average price paid for no/lo drinks was higher than for regular-strength drinks for most beverage types in on-trade sales (e.g. pubs, restaurants and nightclubs) in 2023, but was lower for spirits, wine and ready-to-drink/pre-mixed spirits (RTDs) in off-trade sales [2]. The report also shows that average no/lo prices have decreased over time so that no/lo drinks have become cheaper

relative to regular-strength equivalents. A conference paper by Miller *et al.* used pricing data scraped from the websites of five large retailers in Australia to compare prices of no/lo products (e.g. Heineken 0.0) with regular-strength products of the same brand (e.g. Heineken) [13]. They found that no/lo products that shared branding with a regular-strength product were cheaper on average than those that did not share branding. Further, no/lo products were cheaper than the regular-strength product they shared branding with. Beyond studies focused on pricing, qualitative studies find higher risk drinkers or people motivated to reduce their drinking sometimes regard no/lo drinks as expensive [14–16]. A study of attitudes towards no/lo spirits found this was particularly the case when comparing these products with soft drinks [17]. While some basic survey research has found that price is not a major driver of people's decisions on whether to consume no/lo drinks rather than regular-strength drinks [10, 18], there is evidence using an alcohol purchase task that alcohol-free beer is a more effective substitute for regular-strength beer than soft drinks when it is substantially cheaper than regular-strength drinks [19].

Given this limited and inconsistent evidence base, further research is needed to explore the pricing of no/lo drinks in greater depth. The no/lo drinks available on the market may be cheaper or more expensive than regular-strength drinks, or there may be differences in the price owing to different purchasing patterns. Furthermore, differences in price could be associated with pack sizes, and container size and type. These aspects of no/lo pricing have not previously been studied. We therefore use a range of metrics to examine the pricing of no/lo and regular-strength drinks. We use two key measures of prices: prices available (average across all products in the market) and purchase prices (average weighted by annual sales volume). The prices available data provide information about the overall range of prices that consumers face 'on the shelves' and whether these tend to be more or less expensive. However, this gives equal weight to the prices of a significant number of products with lower sales volumes that may not be available in many stores. Purchase prices provide information about the prices consumers actually pay for products but may not represent products that consumers would prefer to buy if they could afford them. Examining both measures therefore provides a more complete understanding of the pricing of no/lo drinks, how that is reflected within purchasing behaviour and where consumer perceptions around the expensiveness of no/lo drinks may come from.

This article aims to use descriptive analyses of detailed alcohol pricing data for off-trade alcohol in Great Britain to first explore

whether no/lo drinks are more expensive than regular-strength drinks by comparing for no/lo and regular-strength drinks: (i) average prices of products available for sale, purchase prices and their price distributions; and (ii) prices of equivalent products that share branding, pack size, and container size and type. We then explore the associations between pack size, container size, and container type and pricing differences by comparing purchase prices and sales volumes across these factors.

METHODS

Data

The analysis uses a market research data set purchased under licence from the company Circana (Chicago, IL, USA). It contains sales records for no/lo and regular-strength drinks in the off-trade in Great Britain in 2024. Off-trade alcohol sales accounted for 73% of all alcohol sales [20] and 80% of all no/lo sales in 2023 [2]. Circana collect the data via a combination of electronic point of sale (EPOS) and wholesaler data. The EPOS data come from a census of supermarkets (which account for more than 75% of off-trade alcohol sales in Great Britain [20]), some smaller retailers and a weighted sample of the remaining stores. The wholesaler data provide supplementary information for some convenience stores where EPOS data are unavailable. Discount retailers (e.g. Aldi, Lidl) do not provide data to most market research companies.

The Circana data set provides weekly sales value and volume in hectolitres of product for $n = 21\,147$ ($n = 20\,690$ regular strength and $n = 457$ no/lo) named stock-keeping units (SKUs; e.g. 4×330 mL of Heineken, 700 mL of Gordon's Gin), after we excluded gift sets ($n = 120$ regular strength; $n = 1$ no/lo) because the prices include additional items such as glasses. For each SKU, it also provides the ABV, beverage type (i.e. beer, cider, wine, spirits, RTDs), packaging (e.g. glass, can), manufacturer and parent brand for products that have several variants or come in different flavours.

We aggregate the data across the year to avoid seasonal variation in price influencing the findings. As part of the data cleaning, we assessed the data for implausibly low- or high-priced products. To correct these, we identified for possible exclusion products with a price per litre below £1.00 for any beverage type or above £10.00 for beer and cider, £65.00 for RTDs, £700 for spirits and £500 for wine. These plausibility thresholds were identified by examining the price distribution for each beverage type and checking the prices of specific products online. We also checked the identified products with the highest sales volumes within each beverage category to identify whether their price per litre was plausible. This reduced the risk of incorrect exclusion of SKUs and ensured any incorrect exclusions that did happen would be for SKUs with small sales volumes that would be unlikely to affect our results. We ultimately excluded 603 SKUs (3%) with implausible prices, 79% of which were regular-strength beers, that accounted for 1% of the total volume of product sold. This leaves an analytical sample of 20 544 SKUs for analysis ($n = 20\,094$ regular-strength; $n = 450$ no/lo).

Measures

We define no/lo drinks as those containing up to and including 1.2% ABV, in line with the UK Government definition, and separate SKUs into no/lo and regular-strength drinks [21]. The sales value and volume data permit calculation of the price per litre of product for each SKU. However, to enable us to present findings in an accessible form, we calculate the prices per standard serving size for each beverage type separately, based on the median product size in our data set weighted by product sales for beer, cider and RTDs and estimates of typical servings sizes for wine and spirits taken from previous studies, as these products are typically poured rather than consumed in one serving from a single container [22]. The standard product sizes are 330 mL for beer, 440 mL for cider, 175 mL for wine, 50 mL for spirits and 250 mL for RTDs.

We use two measures of prices. For prices available, we calculate the median and interquartile range of prices across all SKUs. For purchase prices we calculate the median and interquartile range of prices across all SKUs while weighting each SKU to account for its sales volume in litres of product. We distinguish between prices available and purchase prices because there are SKUs that are available with low sales volumes. Sales, and therefore purchase prices, are dominated by a smaller number of SKUs from leading brands. We weight by volume of liquid (hectolitres) sold rather than number of sales for each SKU as this avoids giving equal weight to sales of products of different sizes (e.g. a 330 mL bottle and a 500 mL bottle) when calculating measures that are expressed as price per volume (e.g. median price per 330 mL of beer).

Other measures used in our analyses include: pack size (number of containers that are packaged and sold together, e.g. a four-pack of beer); container size (millilitres per container, e.g. 330 mL); container type (packaging used, i.e. bottle, can); and sales volume (natural volume of liquid sold in hectolitres).

Analysis

We conducted exploratory descriptive analyses that compared the price of no/lo and regular-strength drinks. We have not calculated confidence intervals because the near-complete coverage of the market research data set of off-trade alcohol sales in the UK means there is likely to be minimal sampling bias. We have used interquartile range and standard deviation to measure variability.

Are no/lo drinks more expensive than regular-strength drinks?

To understand price differences across the whole off-trade market, we compared the median prices available and purchase prices of no/lo and regular-strength drinks across all SKUs. We used quantile regression to test for the statistical significance of differences between median no/lo and regular-strength drinks prices. This approach is the direct equivalent of the *t*-test for comparing medians [23]. To aid interpretation of average price differences, we also plotted the distributions for these measures using kernel density plots.

To understand price differences between comparable no/lo and regular-strength products, we identified the 20 top-selling no/lo SKUs by sales volume for each beverage type. We then matched these with the highest selling regular-strength SKUs of the same brand, pack size, container size and container type. Where there were multiple flavour variants, we selected the closest match available (e.g. the no/lo product was 'berries & cherries' flavour while the regular-strength product was 'summer berries' flavour). This matching was generally straightforward but was more challenging for wines where no/lo wines were often given simple branding (e.g. 'white') while regular-strength wine brands were categorised by grape varieties or vintage. The wine comparisons should therefore be interpreted with greater caution. We were not able to match several of the top-selling no/lo SKUs because they did not have a corresponding regular-strength SKU or, if they did, these were only sold in different pack sizes or containers and were therefore not comparable. After identifying a set of matched SKUs, we calculated the percentage difference in price per standard serving size for each matched pair.

Are price differences associated with pack size and container type and size?

We expected prices to vary by pack size and container type and size, with larger packs and containers likely to be more cost-efficient for the consumer. Therefore, if no/lo products are more often sold in smaller packs or containers than regular-strength products, this may contribute to higher purchase prices per serving.

We compared how the price difference between no/lo and regular-strength drinks varied depending on how the product was packaged in two ways. First, we compared the median purchase prices for each beverage type by pack size for beer, cider and RTDs. We also calculated the average savings available for each pack size relative to the smallest pack size and then calculated an overall measure of pack size savings by taking the mean of these savings weighted by the volume sold at each pack size. We did not include wine and spirits as they are rarely sold in multi-packs.

Second, for all beverage types, we compared prices across combinations of container size and type (i.e. 440 mL can, 330 mL bottle) that accounted for at least 5% of either regular-strength or no/lo sales volume. In both analyses, we also calculated the proportion of total sales volume within the beverage type that was accounted for by each pack size or container size and type combination.

RESULTS

Are no/lo drinks more expensive than regular-strength drinks across the whole off-trade market?

Table 1 compares the average prices per standard serving size across all no/lo and regular-strength SKUs in 2024 by beverage type. For all beverage types except RTDs, the median price available for no/lo

drinks is lower than for regular-strength drinks, ranging between 19% lower for beer and 44% lower for wine. However, when looking at the median purchase price, although the prices of no/lo wine, spirits and RTDs are lower than their regular-strength equivalents, no/lo beer is 7% more expensive than regular-strength beer and the prices are similar for no/lo and regular-strength cider. All differences are statistically significant except prices available for RTDs, though we note that some differences are statistically significant but not practically significant (e.g. the <£0.01 difference in purchase prices for cider). Table S1 presents the same analyses using means and standard deviations and shows similar findings.

Tlo and regu/lo and regular-strength beer and cider show that there are more unique no/lo SKUs available at lower prices (in Figure 1 the blue dashed line is higher than the red at lower prices), but more regular-strength beer and cider is sold at lower prices (in Figure 1 the red solid line is higher than the blue at lower prices) (Figure 1). In general, the distributions of no/lo purchase prices are narrower and their peak is at a higher price point than for regular-strength drinks. However, no/lo wine, spirits and RTDs have more products available at lower prices and lower purchase prices than regular-strength wine, spirits and RTDs. There are also long tails of more expensive regular-strength drinks for these beverage types that are not available in the no/lo market.

Are no/lo drinks more expensive than regular-strength drinks across comparable no/lo and regular-strength products?

The 20 top-selling no/lo SKUs for beer and cider mostly had equivalent regular-strength SKUs with the same branding, pack size, container size and container type (17/20 beer, 19/20 cider), while the leading no/lo wine, spirit and RTD SKUs were less likely to have equivalent regular-strength products (9/20 wine, 3/20 spirits, 4/19 RTDs). The matched top-selling no/lo products account for 75% of the total no/lo sales volume for beer, 99% for cider, 34% for wine, 76% for spirits and 75% for RTDs. The lower coverage for wine reflects that no/lo wines less often have an equivalent regular-strength brand [2].

For 37 out of 52 matched products, the no/lo SKU was at least 20% cheaper than the regular-strength SKU (Figure 2). Only three matched pairs had no/lo SKUs that were not cheaper than their regular-strength equivalents. Two beers in large pack sizes had slightly more expensive no/lo SKUs, and one wine had the same price for its no/lo and regular-strength SKUs.

Are price differences associated with pack size and container type and size?

Regular-strength beer and cider are more often sold in larger pack sizes than no/lo beer and cider, with 32% of regular-strength beer and 13% of regular-strength cider sold in packs of 12+ (Table 2). Larger

TABLE 1 Prices of products available and products purchased for regular-strength and no/lo drinks in 2024 by beverage type.

		Prices available ^a				Purchase prices ^b			
	<i>n</i> SKUs ^c	Median	% diff. ^d	IQR ^e	<i>P</i> ^f	Median	% diff.	IQR	<i>P</i>
Beer (per 330 mL)									
Regular strength	4657	£1.62		£0.92		£0.88		£0.39	
No/lo	248	£1.31	−19%	£0.84	<0.001	£0.94	7%	£0.26	<0.001
Cider (per 440 mL)									
Regular strength	1085	£1.87		£1.17		£1.10		£0.59	
No/lo	35	£1.36	−27%	£0.58	0.003	£1.10	0.4% ^g	£0.31	<0.001
Wine (per 175 mL)									
Regular strength	9257	£2.23		£1.54		£1.52		£0.35	
No/lo	98	£1.25	−44%	£0.60	<0.001	£0.81	−47%	£0.23	<0.001
Spirits (per 50 mL)									
Regular strength	4225	£1.65		£1.29		£1.02		£0.31	
No/lo	50	£1.12	−32%	£0.50	0.003	£0.91	−10%	£0.15	<0.001
RTDs (per 250 mL) ^h									
Regular strength	870	£1.81		£1.17		£1.74		£0.69	
No/lo	19	£2.00	11%	£0.78	0.390	£1.19	−31%	£0.26	<0.001

^aPrices of products available for sale with no accounting for sales volumes.

^bPurchase prices are the prices of products sold such that products with higher sales values contribute proportionately more to the average price.

^cSKU: stock-keeping units (unique products such as 6 × 330 mL of Heineken 0.0).

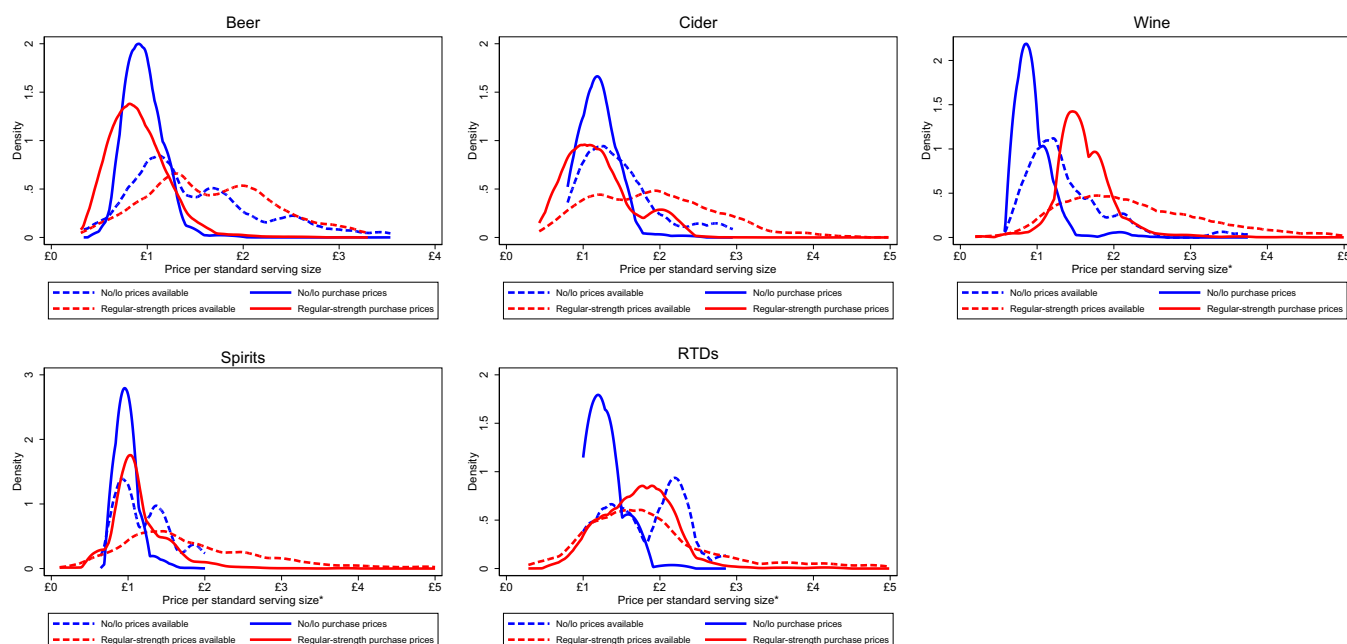
^dPercentage difference in the price of no/lo and regular-strength drinks.

^eIQR: interquartile range.

^fP-value for non-parametric test of equality of medians.

^gThis percentage difference is presented to an additional decimal place to avoid implying that the median prices are identical. The difference between them is less than £0.01.

^hRTDs: ready-to-drink or pre-mixed spirits.

**FIGURE 1** Price of products available and products purchased for regular-strength and no/lo beer, cider, wine, spirits and ready-to-drink (RTDs) in 2024. *Axis truncated at £5 for legibility

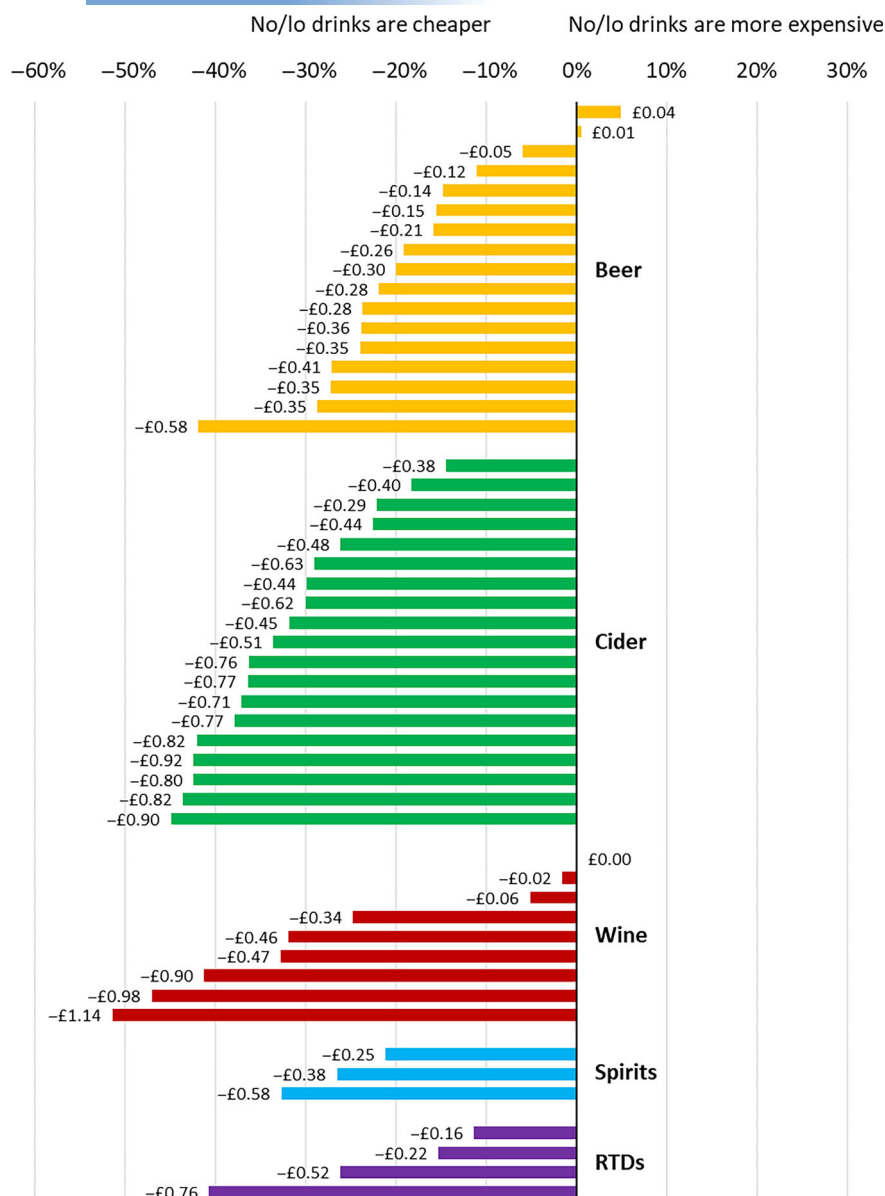


FIGURE 2 Difference in price per standard serving between no/lo and regular-strength products that share the same brand, pack size, container size and type. Positive values indicate that no/lo drinks are more expensive than regular-strength drinks and negative values indicate that they are cheaper

pack sizes are more cost-efficient (i.e. have a lower purchase price per standard serving size) across all three beverage categories for both regular-strength and no/lo drinks (e.g. 55% savings for regular-strength beer in pack sizes of 18+; Table 2).

As a result of higher sales volume at larger pack sizes, regular-strength beer and cider have larger overall pack size savings (~30% and ~16%, respectively) than no/lo beer and cider (~12% and ~10%, respectively). Regular-strength RTDs have overall pack size savings of ~5%.

Across both regular-strength and no/lo drinks, larger container sizes are less consistently available at cheaper prices than larger pack sizes (Table 3). Despite this, larger overall container size and type savings are evident for regular-strength cider, spirits and RTDs (~21%, ~23%, ~12%, respectively) than for no/lo cider, spirits and RTDs (which are predominantly sold in 500 mL bottles, 700 mL bottles and 250 mL cans, respectively). There are slightly larger overall container size and type savings for no/lo beer than for regular-

strength beer (~9% vs. ~5%). Wine is almost exclusively sold in 750 mL bottles.

DISCUSSION

The median price of the no/lo drinks that are available to buy is lower than the median price for regular-strength drinks across all beverage categories except RTDs. No/lo drinks are also cheaper when comparing equivalent no/lo and regular-strength products. However, the median price per serving that people actually pay is higher for no/lo beers and is similar for no/lo ciders compared with regular-strength beers and ciders. This discrepancy partially arises because regular-strength beer and cider is more often sold in larger, more cost-efficient, containers or multi-packs. Drawing on the authors' knowledge and trade press descriptions of products (e.g. [24]) in the UK

TABLE 2 Number of SKUs, proportion of sales, and prices of products purchased for regular-strength and no/lo drinks by pack size and beverage type.

Pack size ^e	Regular strength				No/lo			
	<i>n</i> SKUs ^a	Sales volume (%) ^b	Purchase prices ^c	Savings (%) ^d	<i>n</i> SKUs	Sales volume (%)	Purchase prices	Savings (%)
Beer (per 330 mL)								
1–3	3502	13	£1.24		171	8	£1.08	
4–5	674	33	£0.96	–23%	58	48	£1.09	None
6–7 (6+)	105	1	£0.99	–21%	19	44	£0.80	–26%
8–9	37	1	£0.98	–21%				
10–11	106	20	£0.76	–39%				
12–17	164	12	£0.91	–27%				
18+	66	20	£0.56	–55%				
% average savings ^f				–30%				–12%
Cider (per 440 mL)								
1–3	823	32	£1.45		25	54	£1.34	
4–5 (4+)	159	28	£1.28	–12%	10	47	£1.05	–22%
6–9	24	2	£1.50	None				
10–11	50	24	£1.09	–25%				
12+	28	13	£0.79	–46%				
% average savings				–16%				–10%
RTDs (per 250 mL) ^g								
1–3 (1+)	770	87	£1.80		19	100	£1.32	
4–5	46	3	£1.30	–28%				
6–9	21	3	£1.11	–38%				
10+	29	6	£1.08	–40%				
% average savings				–5%				N/A

Wine and spirits not included as they are rarely sold in multi-packs.

^aSKUs: stock-keeping units (unique products such as 6 × 330 mL of Heineken 0.0).

^bPercentage of total volume across the included categories (i.e. percentages always sum to 100 including for container size and type breakdowns, which do not comprehensively include all products).

^cPurchase prices are the prices of products sold such that products with higher sales values contribute proportionately more to the average price.

^dPercentage savings vs. the smallest pack size and the smallest container size.

^eTable includes pack size ranges where the start of each range is a common pack size and the category contains a minimum of 10 SKUs.

^fThe volume-weighted average savings, with the savings of the smallest pack size or container size, and any sizes with higher prices accounted for as 0%.

^gRTDs: ready-to-drink or pre-mixed spirits.

alcohol market, we also found that the top-selling no/lo products mostly share branding with regular-strength drinks that are positioned and marketed as premium drinks rather than popular budget brands, which may further contribute to higher prices.

This article provides the most detailed comparison to date of the price of no/lo and regular-strength drinks, using different price measures and groups of products. The main strengths of our analysis are the large and detailed data set, which allowed us to explore pricing from several perspectives in a way that was not possible in previous studies. Our sales data comprise near-complete information on off-trade alcohol sales in Great Britain, including all sales from major supermarkets (excluding discount retailers), making them more robust than previous analyses that relied on data from non-random samples or self-report data sets. However, the results may be less

generalisable to shoppers who regularly use discount retailers and convenience stores. The main limitation of the analysis is the focus on off-trade sales. On-trade sales (e.g. in pubs, restaurants or night-clubs) account for only a quarter of UK alcohol sales [20] and 20% of no/lo sales [2], but on-trade pricing patterns may differ substantially from the off-trade owing to the narrower range of products available and the additional costs faced by premises that lead to higher prices for all products. Although our data set is comprehensive and both Circana and our research team use extensive quality control procedures, the scale of the data and the data collection processes make it vulnerable to errors that are difficult to detect or correct. These include incorrect prices, ABVs and container sizes linked to problems such as undetected errors in the data reported to Circana, corrupt data and the inconsistent updating of product

TABLE 3 Number of SKUs, proportion of sales, and prices of products purchased for regular-strength and no/lo drinks by container (size and type) and beverage type..

Container size and type	Regular strength				No/lo			
	<i>n</i> SKUs ^a	Sales volume (%) ^b	Purchase prices ^c	Savings (%) ^d	<i>n</i> SKUs	Sales volume (%)	Purchase prices	Savings (%)
Beer (per 330 mL)								
275 mL bottle	30	0	£0.82					
330 mL bottle	491	13	£1.00	None	80	45	£1.09	
330 mL can	564	6	£1.20	None	85	20	£0.83	-24%
440 mL can	1173	61	£0.76	-8%	18	28	£0.94	-14%
500 mL bottle	1456	5	£1.25	None	29	7	£1.08	None
568 mL can	130	15	£0.93	None				
% average savings ^f				-5%				-9%
Cider (per 440 mL)								
330 mL can	97	10	£1.41					
440 mL can	127	54	£1.02	-28%				
500 mL bottle	471	20	£2.01	None	16	100	£1.34	
500 mL can	71	9	£1.14	-20%				
2 L plastic bottle	35	7	£0.66	-54%				
% average savings				-21%				N/A
Wine (per 175 mL)								
750 mL bottle	8427	100	£1.67		89	100	£0.81	
% average savings				N/A				N/A
Spirits (per 50 mL)								
350 mL bottle	251	7	£1.49					
700 mL bottle	2647	46	£1.25	-16%	38	100	£0.91	
1 L bottle	158	47	£1.00	-33%				
% average savings				-23%				N/A
RTDs (per 250 mL) ^g								
250 mL can	322	44	£2.00		14	100	£1.19	
330 mL can	99	27	£1.76	-12%				
500 mL can	42	11	£1.64	-18%				
700 mL bottle	106	19	£1.24	-38%				
% average savings				-12%				N/A

^aSKUs: stock-keeping units (unique products such as 6 × 330 mL of Heineken 0.0).

^bPercentage of total volume across the included categories (i.e. percentages always sum to 100 including for container size and type breakdowns, which do not comprehensively include all products).

^cPurchase prices are the prices of products sold such that products with higher sales values contribute proportionately more to the average price.

^dPercentage savings vs. the smallest pack size and the smallest container size.

^eTable includes combinations of container size and type that account for at least 5% of either regular-strength or no/lo sales volume and the category contains a minimum of 10 SKUs.

^fThe volume-weighted average savings, with the savings of the smallest pack size or container size, and any sizes with higher prices accounted for as 0%.

^gRTDs: ready-to-drink or pre-mixed spirits.

information. Excluding extreme prices mitigates one type of error but does not eliminate it and may also remove some genuine prices from the analysis. However, it is likely these errors mainly affect

products with lower sales volumes and therefore should not substantially impact our findings. The limitations of market research data sets should also be weighed against decreasing response rates

and substantial under-estimation of alcohol purchasing and consumption in survey-based data sets in countries with privatised alcohol markets, including the UK [25].

Research published in the 2010s, as the no/lo market was starting to grow, showed that consumers found no/lo drinks less appealing than regular-strength drinks and bought them mostly in situations where it would be inappropriate to consume alcohol (e.g. when driving or pregnant) [18, 26]. Marketing campaigns for the new generation of no/lo drinks have sought to change this viewpoint. For example, the Heineken 0.0 'Now you can' campaign sought to disrupt perceptions and present the alcohol-free beer as an all-purpose product for everyone by placing them in unexpected and amusing everyday contexts [27]. Nonetheless, recent research suggests consumers still view no/lo drinks as offering poor value for money, because of the absence of the intoxicating effects of alcohol, and compare their prices unfavourably with those of soft drinks [15, 28, 29]. We found that no/lo drinks are mostly available in smaller, less cost-efficient pack and container sizes, which may contribute to their perceived poor value. Furthermore, the top-selling no/lo products are premium brands, which may lead to both actual and perceived higher prices. This may reflect a deliberate premiumisation strategy, with alcohol producers and retailers seeking to overcome perceptions that no/lo drinks are low-quality products by associating them with reputable brands and marketing them as high-status beverages, 'not just an alternative for when you are unable to drink' [30].

The price of no/lo drinks may be of particular concern for those in lower socio-economic groups who prioritise value and do not routinely purchase premium regular-strength drinks. As this group experiences higher rates of alcohol-related harm and would benefit more from reducing their alcohol consumption than higher socio-economic groups, the perceived price barrier may limit the public health impact of no/lo drinks [31].

Future research should monitor how pricing develops as the no/lo drinks market evolves, including the emerging markets for wine, spirits and RTDs. It should also seek to compare data from Great Britain with other jurisdictions with different alcohol tax rates, beverage preferences and popular brands. Research is also needed to explore the role that no/lo drink prices, both in absolute terms and relative to regular-strength drinks, play in the use of these products to support attempts to reduce alcohol consumption. One important uncertainty is the size of price difference required to prompt people to switch from regular-strength to no/lo drinks, and how much this differs across population subgroups (e.g. by socio-economic status). There is currently little direct research on this, although Acuff *et al.* find the difference may need to be as much as 50% based on the results of a US experimental purchase study [19].

Interventions that reduce the price of no/lo products and therefore increase the price difference with regular-strength drinks, such as exempting them from standard rate value added tax (VAT; 20% in the UK), are a potential policy response. However, public health actors have raised concerns about negative impacts of these products [32]. These may arise from mechanisms including marketing practices that indirectly promote regular-strength drinks (e.g. brand sharing or

surrogate marketing), encroachment of no/lo products into alcohol-free spaces and alcohol producers using their promotion of no/lo products to discourage or distract governments from introducing effective alcohol control policies [1, 32, 33]. Alcohol pricing policies such as increasing taxes and introducing minimum unit pricing are among the most effective and cost-effective measures to reduce alcohol-related harms and would also act to increase the price difference between no/lo drinks and regular-strength drinks [34].

CONCLUSION

Consumers and media commentators often consider no/lo drinks to be expensive and poor value for money. We find that the no/lo products available in the off-trade are cheaper on average than regular-strength drinks, and that top-selling no/lo products are mostly cheaper than regular-strength equivalents. However, people pay more on average for no/lo beer and pay the same price for no/lo cider as regular-strength cider. This discrepancy is partially because no/lo beer and cider are sold in smaller less cost-efficient pack and container sizes than regular-strength drinks, and the premium branding of top-selling no/lo products may contribute to higher prices.

AUTHOR CONTRIBUTIONS

Luke B. Wilson: Writing—review and editing; data curation; methodology. **Abigail K. Stevely:** Writing—original draft; writing—review and editing; methodology; data curation; formal analysis; funding acquisition; visualization; conceptualization. **Colin Angus:** Writing—review and editing; data curation; funding acquisition; methodology. **John Holmes:** Writing—review and editing; conceptualization; methodology; supervision; formal analysis; funding acquisition; visualization; writing—original draft; data curation; project administration. **Mingchuan Tian:** Formal analysis; methodology; data curation; writing—review and editing. **Nathan Critchlow:** Writing—review and editing; funding acquisition; methodology. **Inge Kersbergen:** Writing—review and editing; funding acquisition; methodology.

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DATA AVAILABILITY STATEMENT

Research data are not shared.

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SUPPORTING INFORMATION

Additional supporting information can be found online in the Supporting Information section at the end of this article.

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