Market Research Module – Group Project:

Reinforcing Brand Loyalty and Expanding Market Reach of 0% Alcohol Beer in the UK Market (Case Study: Heineken 0.0)

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[Video Presentation Link]

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Executive Summary

This report focuses on the marketing strategy of a non-alcoholic beverage, Heineken 0.0, within the UK market landscape. The research is conducted following the 'backward market research' concept previously discussed in class. Following this strategy, we started this research with the goal to reinforce brand loyalty and expand market reach for Heineken 0.0 amidst changing consumer preferences and persistent social stigmas. Despite the UK beer market being strong, with sales of 3.7 billion liters in 2023, the non-alcohol segment is growing, particularly amongst health-conscious individuals and younger demographics. However, social stigma still becomes a barrier for it to reach a wider audience.

Through this research, we found interesting findings such as that non-alcoholic beverages are still often viewed as 'fake' or socially awkward in a social setting—where consuming alcohol is what most of the group members do, particularly with young adults. Heineken's current marketing strategy already promoted its health benefits, but it needs to do better in addressing the stigma to enhance the product to be more appealing to current or potential customers. From the focus groups, we can see that young adult consumers—those aged 18-24—wants a more innovative and inclusive branding that focuses on a distinct identity for non-alcoholic beverages rather than positioning them only as substitutes.

Beyond that, we also did secondary research through social listening. The data reveals a generally neutral consumer sentiment towards Heineken 0.0, with some negative perceptions tied to social pressures and price sensitivity. The report suggests that Heineken can leverage user-generated content (UGC) to further enhance their brand image and encourage more peer recommendations. Additionally, developing a better-taste beverage can increase consumer interests and purchase willingness.

The report concludes with recommendations for Heineken to focus on their distinct identity, health-conscious message, and enhance product quality (specifically on their flavor), since a better flavor will encourage people to choose Heineken 0.0 instead of other non-alcoholic beverages (e.g.., sodas) in a social setting. These strategies aim to align Heineken 0.0 with modern consumer values and expand market share in the evolving UK beer landscape.

1. Research Background

It is certainly eccentric that a brewing company with a long-standing tradition of producing globally renowned beers has made a significant investment in promoting Heineken 0.0, their non-alcoholic beer. This is particularly interesting considering that alcoholic beer consumption remains strong, with the UK selling 3.7 billion liters of beer by the end of 2023 (Statista, 2023). In this context, Heineken's decision to market their alcohol-free option with alcoholic beers raises important questions about consumer behavior, particularly concerning the social stigmas that persist around non-alcoholic beverages. Our research aims to explore how Heineken can further refine its marketing strategy for their non-alcoholic beer to address these stigmas and extend its appeal to a broader audience.

According to Heineken's website, their current strategy targets both men and women who enjoy the taste of beer but may not want the effects of alcohol at certain times of the day. They aim to emphasize the value of staying in control while still having fun, to encourage people to reflect on their drinking habits, particularly during social events, and to promote moderation as a positive choice by offering a non-alcoholic option. However, while effective, this strategy may benefit from addressing the persistent social stigmas that non-alcoholic beers face, particularly in social settings where alcohol consumption is a cultural norm.

Pubs have been engrained in the UK social culture since the 1940s, where beer is the most common beverage consumed. Despite a rise in the health-conscious market, beer drinking remains a big social activity. Although the UK beer market is forecast to grow by 7.81% between 2023 and 2027 (Dram, 2023), the rise of alcohol-free beers signals a shift in consumer preferences, especially among younger and health-focused demographics. Tesco reported a 25% increase in sales of no- and low-alcohol beers in June 2023 compared to the previous year, reflecting this changing landscape (The Guardian, 2023).

Public health initiatives like "Dry January" have also helped shift attitudes towards alcohol reduction, growing from 4,000 participants in 2013 to 175,000 by 2023, with significant positive social engagement (Alcohol Change UK, 2023). This reflects a broader trend among younger, health-conscious individuals who are open to alternatives like non-alcoholic beer. Celebrity involvement is also shaping this market. Bella Hadid's Kin Euphorics, launched in 2017, and Blake Lively's Betty Buzz, a premium soda line, both offer alcohol-free options. Heritage brands are also entering the growing market while maintaining their traditional appeal (Portman Group, 2023).

However, despite the growing appeal for non-alcoholic beverages, social stigmas continue to limit their broader acceptance. According to Sayette et al. (2012), humans have a fundamental need for social belonging, and alcohol plays a central role in fostering group bonds, particularly in social settings. A YouGov study revealed that 23% of people had been discouraged from

choosing low- or non-alcoholic beverages, and 35% had witnessed others being discouraged (Drinkaware, 2021). For many, especially younger adults, these stigmas are a significant barrier. Approximately 14% of respondents feared a negative reaction when drinking a non-alcoholic option, and 25% of UK men linked non-alcoholic beer with reduced masculinity. Moreover, 29% of consumers worried about peer judgment, and 35% viewed non-alcoholic beer as a compromise rather than a preferred choice.

Focus groups commissioned by YouGov provided additional insight into these social stigmas, with participants using terms like "fake," "pointless," and "boring" to describe alcohol-free drinks (Drinkaware, 2021). Many perceived these beverages as acceptable only in limited situations, such as for drivers or those with medical or religious reasons, rather than a viable everyday choice. This reflects how alcohol beverages are perceived in social norms, making non-alcoholic options seem "awkward" or less appealing in communal drinking settings.

To address these challenges, our research will explore consumer perceptions of 0.0% beer as a social construct and evaluate Heineken's marketing strategies. Using both primary and secondary data, including focus groups of 18-24-year-olds and social listening from YouScan, we aim to understand social stigma, peer pressure, and willingness to adopt non-alcoholic options. By understanding how different demographic groups perceive alcohol-free beers, particularly in social contexts, we aim to uncover barriers and opportunities for Heineken to better communicate the value of their 0.0 product.

2. **Social Listening Result**

Through the social listening study of Heineken 0.0, key factors can be identified that influence consumer perceptions and their purchase decision: its availability and accessibility of various venues, its taste and quality, the price sensitivity, social and environmental factors, and personal health considerations, such as sobriety and desire to avoid alcohol, in which we identify that social stigma is a significant factor influencing consumer sentiment. Among the total mentions, 79.2% are neutral, 14.6% are positive, and 6.2% are negative. The UK region is in line with the global trend. It implies that most consumers do not have a strong emotional disposition towards Heineken 0.0, with positive sentiments being twice as high as negative ones, suggesting an overall favorable image of the brand.

A crucial finding is that Heineken 0.0 is often perceived as "unorthodox" in social situations, especially in environments that emphasize an alcoholic culture, and consumers may feel embarrassed or undervalued for choosing a non-alcoholic beverage. This social stigma can make consumers feel incompatible when choosing 0.0 at events or reluctant to disclose their choice for fear of negatively affecting their image in social settings. This social pressure has weakened the

acceptance of Heineken 0.0 among traditional drinkers and limited the demand to those who are looking for a non-alcoholic beverage.

Nevertheless, Heineken 0.0 has already attracted several consumers, mainly due to its convenience, satisfying taste, and availability as an alternative to alcoholic beverages. Especially in many pubs and restaurants, Heineken 0.0 is easy to buy and considered a reasonable choice. Most consumers praise Heineken 0.0 for its good flavor profile among non-alcoholic beers and that it offers a healthy alternative for social occasions, enhancing the overall consumer experience.

Data shows that 133,616 mentions were made on Twitter, so brands can further increase interaction and marketing through Twitter. 113,026 reposts show that users are spreading the word spontaneously or engaging in discussions on the topic, and 51,408 mentions are related to word-of-mouth, which means that a lot of users learned about Heineken 0.0 through recommendations or discussions from others. However, Heineken 0.0 also faced some negative feedback. Some consumers felt that its flavor and quality were far short of expectations as a substitute for traditional beers, which are not comparable. The social stigma and negative feedback became a challenge that Heineken had to overcome to grow its market share and improve its brand identity.

3. Qualitative Research

a. Research Methodology

For this research, we employed focus groups as the primary method to collect qualitative data, with the objective of obtaining detailed and in-depth responses. In the context of our study, we aimed to understand the behaviors, motivations, and attitudes of our target population—individuals aged 18-24 in the UK—by facilitating group discussions that would allow participants to engage with the questions. We designed questions to be open-ended to allow for a range of responses. This method of questioning also allowed us to use probing techniques to delve deeper into participants' responses, encouraging them to clarify or expand on their points when necessary.

Our sampling strategy for this study was purposive, meaning that we specifically targeted individuals who would best represent the demographic of interest—people in the UK aged 18-24. We selected respondents based on their relevance to the study's objectives and used convenience sampling. This type of non-probability sampling involves selecting participants based on their availability and willingness to participate rather than through a random selection process. Due to the constraints of time and resources, we opted to recruit individuals from our personal networks, ensuring that they met the demographic and characteristic criteria of our target population. Importantly, we avoided selecting MSc Strategic Marketing students since it may cause bias in their response to our questions.

From there, we decided to conduct two focus groups. Each consisted of five participants within the 18–24-year-old age range, with a mix of people who drink alcohol and don't. We categorized the focus group questions based on key themes and designed a script as a guideline for

the moderator (see Appendix A to B). We tried to keep the participants engaged in a natural, conversational way of voicing out their thoughts. We chose not to use a pre-screening questionnaire for participant recruitment, as the individuals involved had been pre-qualified based on prior knowledge. Instead, we used direct outreach to confirm their availability and ensure they fit the target demographic.

The questions were carefully crafted to explore the participants' views on five key themes: *Awareness & Perception of Non-Alcoholic Beverages, Social Stigma & Consumption Behaviour, Motivations & Barriers to Consumption, Influence of Advertisement & Brand Perception, Purchase Willingness.* We also use probing questions to further facilitate the conversation between participants, as it encouraged them to elaborate more on the reasons behind certain behaviors around non-alcoholic beverage consumption. For example, in discussions about *Social Stigma & Consumption Behaviours*, we were able to probe whether participants felt pressured to drink in social situations or whether they made conscious decisions based on other concerns.

b. Results and Analysis

After conducting the focus groups, we code general responses with themes given in Table 1.

Focus Group Coding based on Key Themes (Table 1)				
Awareness and Perception of non-alcoholic beverages	***Social Stigma and consumption behavior***	***Motivations and Barriers to consumption***	***Influence of Advertisement and Brand Perception***	***Purchase Willingness***
"Prefers soda or coke"	"Does not believe there is any social stigma with non-alcoholic drinks"	"Believes non-alcoholic drinks does not have a separate identity"	"Companies should market its health benefits and the drawbacks of alcohol"	"Peer recommendations or out of curiosity, no real preference to non-alcoholic drinks"
"Has tried non-alcoholic drinks out of curiosity"	"Believes culture affects how people perceive non-alcoholic drinks"	"No exciting options at restaurants and bars for non-alcoholic drinks"	"Companies should market health benefits"	"Peer recommendations matter and there are other substitutes for people rather than non-alcoholic drinks"
"Thinks non-alcoholic drinks are not socially accepted like alcoholic drinks are"	"Believes there is a social stigma around a younger audience"	"Believes non-alcoholic drinks are healthier"	"Companies should bring awareness towards sobriety"	"Shows willingness as health-conscious drinking rises"

"Does not drink any alcohol or non-alcoholic drinks"	"Believes cultural traditions effect consumption"	"Does not find a difference in taste"	"Companies should brand it as an exciting product"	"People are drinking less due to substitutes that are not non-alcoholic drinks"
"Prefers coffee, and does not drink"	"Does not drink due to religious reasons"	"Younger audiences are more accepted socially with non-alcoholic beverages"	"Thinks current branding may be insensitive and non-appealing"	"Shows willingness only in case of Word of Mouth and believes people do not care too much otherwise"

Following our coding, we may then create a Customer Segmentation to derive our understanding of the Focus Groups, as shown on Table 2 below:

Customer Segmentation (Table 2)		
Bystanders	***Health Conscious***	***Value Driven***
This consumer segment believes that the non-alcoholic market is not too relevant, especially amongst drinkers who prefer the effects of alcohol and would not use a substitute. The segment also does not share significant simulation from marketing tactics and share the social stigma of non-alcoholic drinks being taboo.	This consumer segment believes that the non-alcoholic market is beneficial especially from a social and health point of view. Respondents react positively to marketing around sobriety and health-conscious drinking and believe non-alcoholic drinks should be more socially acceptable.	This consumer segment believes non-alcoholic drinks should be more product based, and preferences may change if the product offers good value and is marketed well. Respondents do not tie the product with social stigma and rather place emphasis on brand image and loyalty.

Some key takeaways from our focus group findings are:

- *Current non-alcoholic branding is unsuitable and does not feel inclusive to non-alcoholic drinkers.*
- *The product itself lacks innovation: no new taste and not enough variety.*
- *Companies only market it as a substitute, which many may find disorienting to the company image as they appear to do it for profit.*

- *Companies do not focus enough on the sobriety and health benefits of switching to 0.0 alcohol.*
- *Brands may need to create a separate and distinct identity for the product.*

4. Recommendations

Based on the research results, below are our recommendations for Heineken 0.0 to further strengthen their brand loyalty and expand its presence in the UK market:

A. Distinct Identity to Minimize Social Stigma

As per our research, most respondents felt like the non-alcoholic beverages lack a distinct identity. Therefore, a shift of brand image from being a "substitute" to being a lifestyle product is important to alter consumer perception of the product itself. Heineken can develop a separate brand identity for Heineken 0.0 by highlighting its health benefits rather than positioning it simply as an alternative to regular beer. Heineken can also create a standalone narrative around sobriety and wellness to appeal to a more Health-Conscious segment of consumers.

B. Leverage User Generated Content (UGC)

Through social listening and focus groups, we identify that peer recommendations are highly effective in terms of raising purchase willingness. Hence, Heineken can utilize user-generated content (UGC) to build their brand image and increase word-of-mouth. Especially with the rising demand for non-alcoholic beer among young consumers, Heineken 0.0 could increase market acceptance through better product education and brand storytelling through social media.

C. Enhancing Product Placement/Availability

Heineken 0.0 needs to enhance their presence in social gathering places such as pubs and bars. This is because, whilst many people have already heard about Heineken 0.0, this availability is not made clear in pubs or bars. Which makes it harder for people to keep Heineken 0.0 as their top-of-mind in terms of choosing a non-alcoholic alternative during their social gatherings.

D. Innovation in Product Variety/Offering

The lack of variety and innovation in the non-alcoholic beer category was another major drawback identified by focus group participants. Introducing new flavors or limited-edition

variants of Heineken 0.0 could excite the market and give consumers more reasons to choose it over other beverages. This could be supplemented by offering sample packs or multi-bottle discounts to encourage trial and repeat purchases.

5. Limitations and Future Research

While most of the learnings from the focus groups were suitable for this study, it is important to acknowledge technical limitations such as:

- Small sample size, which was constrained by timing and resources. As a result, the data we collected may not fully capture the diversity of perspectives within the wider population of 18-24-year-olds in the UK.
- Similar backgrounds of respondents (students). There is a tendency of bias towards socially attractive responses being in a group with other people of generally the same age bracket. For example, participants who are more health-conscious may have been overrepresented due to our personal interests in health and wellness.
- Segmentation Analysis. The segments of Bystanders will have the possibility to overlap with the value-driven segment due to both segments having similar responses to several questions, like why they prefer alcoholic beverages over non-alcoholic beverages.
- Some results are not easy to interpret. Topics on cultural issues in response to their perception of alcohol may be very subjective to them and not formally representative of a larger share of the consumer population.
- Consensus about questions about personal preferences. With consensus about answers like their preferences of what to drink (generally respondents take peer recommendations), it is hard to interpret what the respondents' perceptions are about people who drink non-alcoholic drinks in a social setting.

Despite these limitations, the use of focus groups was justified by our objective to explore in-depth the motivations and attitudes of specific lifestyle groups. By choosing participants who fit well within the demographic and thematic scope of our study, we were able to gather valuable insights that could inform future research or interventions targeting this age group.

For future research, a more suitable alternative to these questions would be to ask consumers categorically about their direct opinion of what they think about an individual who drinks a non-alcoholic beverage in a social setting, along with allowing respondents to describe what image you would associate with that individual. This would give more concrete evidence on the social stigma and perceptions surrounding these non-alcoholic beverages.

Appendix A

Focus Group Discussion (FGD) Guideline

A. Task Description of Focus Group Members:
   1. Participants Requirements:
      a. Consisted of 5 people in a group
      b. Age range: 18 – 34 years old
      c. Have consumed alcohol in a social setting before the focus group
   2. Moderator:
      a. Give brief to participants on the general purpose of the discussion
      b. Explain the presence and purpose of recorded meeting (via Zoom)
      c. Address the issue of confidentiality *(as written on the script)*
      d. Remind participants to fill out the consent form link
      e. Conduct & lead the focus group discussion
   3. Assistant Moderator
      a. Operating the zoom platform and necessary links distribution
      b. Preparing the zoom platform *(video conference link)*
      c. Distribute zoom link to participants
      d. Ensure the attendance of all participants before FGD is conducted
      e. Record the focus group process and ensure the recording is saved
      f. Distribute the consent form link in the beginning of FGD to participants
      g. Allowed to take additional notes to support moderator's notes *(with no participation in the discussion itself)*
      h. Do final check on participant consent form submissions before closing the video conference

B. Additional Information
   1. At a certain point of focus group discussion, participants will be shown 2 advertisements about non-alcoholic beverages on a PowerPoint slide. This slide will be referred to **'Slide 1'** in the script.

Appendix B

Focus Group Discussion (FGD) Script

(Coding Standard: M stands for Moderator; P for Participant; AM for Assistant Moderator)

Introduction & General Purpose of the Discussion

M : Welcome everyone and thank you for being here today. I am _____ and I will guide you as a moderator in today's discussion. We'll be doing a focus group on consumers' perception in consuming a 0% alcohol. Specifically, we want to understand the social factors in non-alcoholic beverages consumption. Once we understand your perspective, we will be able to put out a product that is more suitable to your preference. That is why today we want to hear more from you. There is no right or wrong answer to the questions I'm going to ask you, so feel free to voice out your thoughts on the questions.

General Brief, Purpose of Recording and Consent Form

M : Before we started, I want to brief you on several important things. **First**, we will compile the information we gathered today into a final report that will include a summary of your responses and recommendations. It will be shared with the academic body of Imperial Business School, Strategic Marketing department. **Secondly**, we will ensure your anonymity & confidentiality. "Anonymous" means we will not use your real name or your individual identity in our report, and "Confidential" means that what we asked you here should not be repeated or distributed outside of this Zoom meeting. Since we'll be running several focus groups, it is important that your response here is not repeated by a member of another focus groups. **Lastly,** you can see that we will be recording this focus group session. We will only use the recording to ensure we're making the right notes. This recording will not be heard by anyone outside of this project members.

(make sure everyone understands the brief/ask whether anyone have any questions)

Focus Group Questions (All Asked by Moderator)

Opening & General Awareness Question

- *Please share with us your name, what is your favorite drink and what you love to do in your free time*
- Have you consumed non-alcoholic beverages before? Why or why not?

Probing Question (if necessary): How do you think others perceive non-alcoholic beverages?

Transition Questions #1

- When you think about non-alcoholic beverages, what brand comes to mind?

Key Questions (Social Stigma in correlation to Consumption Behaviour)

- What is your general opinion of non-alcoholic beverages?
- Do you feel there is any stigma associated with drinking non-alcoholic beverages, either in private or social settings?
- How comfortable are you ordering and drinking non-alcoholic beverages in public? Why?
- Are there specific settings where you would not drink non-alcoholic beverages because of fear of judgment or stigma? Can you give examples?
- What factors would make people more comfortable in consuming non-alcoholic beverages?

Probing Question (if necessary): Does anyone else had a similar (or very different) experience?

Transition Questions #2

- How do you think advertisements affect people's buying decision?
- Have you seen an advertisement for non-alcoholic beverages?
- What do you like or not from the advertisement?

Key Questions (Influence of Advertising & Brand Perception)

(show 'Slide 1')

- How do you feel about these advertisements?
- Does this affect your perception of people consuming non-alcoholic beverages?
- How does the idea of Heineken, a popular alcoholic beer brand, launching a non-alcoholic product affect your opinion of the product?

Probing Question (if necessary) : Does anyone else feels the same way about Heineken's non-alcoholic advertisement?

Transition Questions #3

- When you hear the brand: Heineken, what comes to mind?
- How much does peer recommendation impact your purchase decision?

Key Questions (Purchase Willingness & Behavioural Insights)

- Are there any specific moments or events where you would be more likely to purchase Heineken 0.0 (e.g., social gatherings, work events, sports)?
- Do you think campaigns or promotions focused on inclusivity, or social acceptance would change people's perceptions?
- What changes could Heineken 0.0 or similar non-alcoholic beverage make to reduce social stigma?

Closing Questions

- How do you think the market for non-alcoholic beverages will evolve in the coming years, especially in terms of public perception?
- Do you have any change of perceptions on Heineken 0.0 before and after this discussion?
- Would you consider buying or consuming Heineken 0.0 in the future? Why or why not?

Probing Question (if necessary) : Does anyone else want to share their opinions too?

- Is there anything you want to add on how to engage more people to try non-alcoholic beers?

Closing Statement

M : That is the end of our discussion today. Thank you everyone for your active participation and helpful input on our research. Have a great day!

Appendix C

Focus Group Discussion Recap

Group 1

FOCUS GROUP 1	*Respondent 1*	*Respondent 2*	*Respondent 3*	*Respondent 4*	*Respondent 5*
Fav Drink	Beer / Jaegerbomb	Prosperous (Vodka) & Wine	Coffee	Beer (Corona)	Coffee, beer, cider, soju
What do you do on your free time	Football & Music	Sports & Socializing	Watching sports	Plays football	Korean culture (kpop, kdrama)
Have you consumed non-alcoholic beverages before? Why or why not?	Have. Out of curiousity. Personally don't prefer it because when I drink I want to feel the effect of the alcohol	Have, out of curiousity. A good alternative when you drive	Have tried non-alcoholic drinks (on fine-dining restaurant) to match with other people that's eating	Have, out of curiousity. Never tried it again afterwards. Same reason with Akash	Have, out of curiousity. I do recommend it to my non-drinker friends,
When you think about non-alcoholic beverages, what brand comes to mind?	Heineken, Bacardi	Heineken, German brands	Home-country	Heineken	Heineken, Bintang (local)
What is your general opinion of non-alcoholic beverages? + Do you feel there is any stigma associated with drinking non-alcoholic beverages, either in private or social settings?	when younger there's a pressure, but now I don't really drink non-alcoholic drinks	good alternative for those who doesn't want to drink bcs if everyone's drinking there's a a feeling of pressure to join in	it's good alternative for people who want to stop consuming non-alcoholic drink. since now there's a health & sobrierity concern	a good option for non-drinker who would feel a bit left out within a public setting	I personally never consider takin non-alcoholic drinks. never felt pressured to drink within a social settings
Are there specific settings where you would not drink non-alcoholic beverages because of fear of judgment or stigma? Can you give examples?	When I want/need to be sober but I'm going out with friends	yeah I would go for the non-alcohlic if I need to be sober	yes there's a social pressure when everyone is holding drinks, but I would still choose coke	No. still choose to not drink non-alcoholic eventough it's in a social settings	
What factors would make people more comfortable in consuming non-alcoholic beverage?	I don't really think we can influence anyone's preferences (even with marketing)	increased marketing around it. More presented in bars (so that it'll be seen as something normal), so we can be more comfortable on choosing the non-alcoholic drink	if it seen as something more normal to others	more inclusion around consuming non-alcoholic beer (not being seen as weird/out of place)	agree with Lilly (marketing is necessary) because not many bars are offering non-alcoholic drinks; make the taste a bit different (it has the taste of beer but not that good)
Which one of you have seen an advertisement for non-alcoholic beverage?	Have	Have not	Have not	Have not	Have not
Do you think these advertisements affects people's buying decision?	Yes. In a positive way	Yes. In a positive way		Yes. In a negative way	Yes. In a positive way
How do you feel about these advertisements?	1: doesn't strike as a non-alcoholic advertisement for me from the first look 2: the religion reference makes it more reconigzable	1: not easy to recognize that the first one is an ad for non-alcoholic drink 2: a bit more recognizable, but not super clear either	1: doesn't say that much 2: has message/objective of not drinking much alcohol –> delivers the message of non-alcoholic beverage better	1: it's not clear that it is an ad for non-alcoholic beer 2: clearer because of the religion reference	1: same. Doesn't directly showing about non-alcoholic drink (unless I zoom in and see the 0.0) 2: more clear about the non-alcoholic beverage reference, but not convincing either as an advertisement (no other interseting facts)
How does the idea of Heineken, a popular alcoholic beer brand, launching a non-alcoholic product affect your opinion of the product?	the adverts doesn't serve clear purpose; don't really know what they're trying to do/feels like they're just wing it (following the trend)	it's nice that they provide options for non-alcoholic drinks.	heineken = alcoholic brand still sticks more to me; the adverts doesnt really made the impression of non-alcoholic beverage	it's good to introduce it for first timers drinkers	I don't really see Heineken differently. But it's nice that having non alcoholic drink because I can introduce my fav drink to my friends who don't drink for personal reasons
Are there any specific moments or events where you would be more likely to purchase Heineken 0.0 (e.g., social gatherings, work events, sports)?	No. because it soesnt taste good and my main reason to drink is to feel the effect of the alcohol	at work settings or with a new group that I just met (bcs Im not comfortable yet to be drunk around them)	since I don't drink alcohol, I think I most probably would take 0.0 on a party.	when I hung out with younger group, I would recommend them the non-alcoholic drink. Or when I need to drive	maybe in certain situation when I cant drink but I want to feel the 'taste' of beer – but most likely I'll grab soda bcs non-alcoholic drinks doesn't taste that good
How much does peer recommendation impact your purchase decision?	same as lilly	Yes if a friend recommends things to me I will most likely to try it	Yes. If I don't try it I'll be curious about it everytime I see it	Yeah I think I'll try once	Yes. Because my friends have similar taste with me
Do you think campaigns or promotions focused on inclusivity, or social acceptance would change people's perceptions?	personally I don't think it will affect me. But I think it's possible to affects people's decisions	yes it will change perspectives since it makes it more 'normal' --> if it's more hyped up I think more people will drink it	personally I wont go and try, but I think for health-concious people may be affected by those campaigns	yeah a good campaign may change people persepective. Try to combine it with another drinks' strategy (coke, redbull etc) -> focusing on its' usp (unique selling proposition)	it may affects perspective, but for non-alcoholic drinks I don't think it affects things that much.
What changes could Heineken 0.0 or similar non-alcoholic beverage make to reduce social stigma?	feasibility & customer education. But most importantly is to **make it taste better** bcs now it taste a lot worse and without the alcoholic effects	(no answer)	what matters: the taste, brand identity and presentation.	they could market it in some other fashion	The main issue is that there's not really any innovative change in terms of taste. Because we drink for the alcoholic effect, so **we need to be convinced with a better taste of beverage**
Do you have any change of perceptions on Heineken 0.0 before and after this discussion?	Nothing's change. I still think them as an alcohol producer company	yeah I will think a bit more about it and inclined to buy it now	yes I think I'm considering it more now because of the brand identity	Not changing my decision.	there's new awareness about the social stigma around non-alcoholic drinks consumption
What makes you more inclined to buy it now?	Not inclined to buy (prefer water or coke for non-alcohol option)	Because I know more about it know (raised awareness)	because of curiousity & brand name	Not inclined to buy (I'll go with coke if I want non-alcoholic drinks)	I'll still choose coke over non-alcoholic
Is there anything you want to add on how to engage more people to try non-alcoholic beers?	companies would get more success by **not trying to replicate how alcohol would taste**	it's good that they start focusing on non-alcoholic drinks (you should still have fun even without alcohol) but they need to do more marketing around it	the marketing; if they are selling non-alcoholic beverages, they're inviting new market segments to buy their products	(no comment)	(no comment)

Group 2

FOCUS GROUP 2	Respondent 1	Respondent 2	Respondent 3	Respondent 4	Respondent 5
Fav Drink	Apple Spritz or cocktail	Guinness	Cider	Doesn't drink (no n.a beer, wine, or cider)	Coffee
What do you do in your free time	Sports and socializing	Sports	Socializing and going out to eat	Likes history and reading	Coffee and sight-seeing
Have you consumed non-alcoholic beverages before? Why or why not?	Yes, soda or coke out of curiosity	Yes, tried n.a drinks out of interest	Yes, for health reasons	Doesn't drink	Doesn't drink due to religious reasons
When you think about non-alcoholic beverages, what brand comes to mind?	Heineken (from memory or adverts)	Guinness 0%	Heineken	Heineken	Heineken
What's your general opinion of non-alcoholic beverages?	Non-alcoholic drinks usually have alcohol but now don't (no separate identity for n.a drinks)	Believes more exciting n.a options should be available. Thinks n.a should have more variety, taste, and identity	Believes n.a beverages face social stigma, especially among younger people	Thinks companies should make n.a drinks more exciting	Believes youngsters are more accepted with n.a drinks than older people
Are there specific settings when you drink non-alcoholic beverages?	Would like n.a drinks available in social settings, restaurants	Feels social stigma in bars, bartenders may judge	Thinks n.a should be made more inclusive and not targeted at drinkers	Believes sobriety should be celebrated	Thinks some branding of n.a drinks is insensitive
Do you feel that there is any stigma associated with drinking non-alcoholic beverages?	No apparent social stigma	Yes, especially in bars, and influenced by cultural and religious reasons (Lebanese and French cultures)	Yes, particularly with younger crowds and in French culture where n.a drinks are taboo	No, feels people are respectful of her choice	Yes, thinks there can be stigma depending on the branding and cultural influence
Can you give examples?		Social stigma arises mostly in bars	Word of mouth and peer recommendations are key	Doesn't see a difference between drinkers and non-drinkers, but ads like "Cheers or No Cheers" could be harmful	Feels people don't care much about the n.a market
Have you ever seen non-alcoholic drinks advertised?	Yes, remembers Heineken adverts	Yes, saw Guinness 0% but felt the company was more focused on profit	Yes, but feels some ads are socially targeting non-drinkers	Yes, but doesn't like branding that touches on religion	Yes, but thinks the branding isn't that appealing
Do you think these advertisements affect people's buying decisions?	Yes, good ads matter because the company's image matters	Thinks ads affect people's perception of the brand, especially when they seem profit-driven	Word of mouth is more important	Thinks advertising matters if it's about brand identity and social responsibility	Thinks it affects young people's buying decisions
How do you feel about these advertisements?	Focus more on the 0-alcohol message, not just the Heineken branding	Feels ads ruined the perception because they seemed focused on profit	Thinks some ads target social acceptability, which is unnecessary	Doesn't like branding using sensitive issues like religion	Thinks some branding is insensitive
How has the idea of Heineken, a popular alcoholic beer, launching a non-alcoholic product affected your opinion of it?	Feels it should focus on the health and social responsibility benefits of being 0% alcohol, not the brand name	New label and identity are important for n.a drinks, companies should focus on that	Feels n.a drinks need to focus less on alcohol and more on inclusion	Should make n.a drinks more exciting, but not by using sensitive cultural topics like religion	Feels people are not too interested in the n.a market and there should be more sensitivity
Do you think campaigns around non-alcoholic drinks can influence people's choices?	Yes, especially if marketed like sugar-free drinks, focusing on health benefits	Campaigns seem like a company just trying to make money, ruins perception	Feels word of mouth is much more influential than campaigns	Yes, but only if it promotes the positives of sobriety	Thinks campaigns won't change people's choices
Have you noticed any major changes in the way people are drinking?	More focus on health and avoiding alcohol	Yes, campaigns could hype it up but people have other ways of relaxing, they may not choose n.a drinks	Yes, rise of health-conscious drinking	Yes, sees a rise in non-drinking habits and marijuana use	Yes, more youth are opting for n.a drinks than older people
Do you think Heineken 0.0 or similar non-alcoholic beers should be rebranded?	Yes, using the sugar-free drink approach and focusing on health benefits	Yes, new identity and taste should be a priority	Yes, should focus less on alcohol-based comparisons and more on social inclusion	Yes, make it more exciting	Yes, should focus on a new and better taste
How would you change the branding of non-alcoholic drinks?	Focus on health benefits, not the alcohol-free comparison	Rebrand the label and identity for n.a beverages	Focus more on social inclusion, less on comparing to alcohol-based drinks	Avoid sensitive topics in advertising, like religion	Make it more appealing and sensitive to different cultural contexts
What motivates you to try or not try non-alcoholic beverages?	Would try due to health benefits and curiosity	Social norms and word of mouth	Peer recommendations are important	Doesn't drink	Doesn't drink due to religious reasons
How would you rate the success of current non-alcoholic beverage advertising?	Believes better focus on social responsibility can improve it	Believes it's profit-driven and that ruins the brand perception	Feels it needs to be more inclusive	Thinks advertising is not very effective due to insensitivity	Thinks advertising is insensitive, people don't care much about it

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