

2021



2021 Overview **DRY JANUARY**

NBCUniversal



2020 cemented the NOLO alcohol category as a mainstay

At-home occasions and increased awareness of health and wellness prompted category growth. Where NOLO alcohol offerings were once almost stigmatized, the category has now become aspirational, with consumers increasingly willing to pay a premium for NOLO alcohol products.

+7.5%

projected CAGR for the non-alcoholic beer market by 2026, with a projected global revenue of \$29 billion

+42%

increase in online searches for 'mocktails' in the past year, according to Google Trends

Brands across the alcohol category are leaning into the NOLO space

Brands such as AB InBev and Diageo have indicated they will make heavy portfolio shifts towards NOLO in the coming years.

ABInBev

NOLO Brands:

Budweiser Zero, Stella Artois 0.0, O'Doul's

“Approximately 8% of AB InBev's global beer volumes come from no to low alcoholic beers, as the world's largest brewer works towards its goal of 20% by 2025. We're committed to innovation in this space.”

*Adam Warrington,
President of Corporate Social Responsibility*



NOLO Brands:

Heineken 0.0, Amstel 0.0

“The consumer landscape is changing as people seek healthier and more natural non-alcoholic beverages. Our low- and no-alcohol portfolio of brands continues to grow at scale, with some 348 line extensions across 123 brands.”

Heineken 2020 Full Year Report

DIAGEO

NOLO Brands:

Seedlip, Ritual Zero Proof, Pure Brew

“We must be beautiful in the no and low category. Gen Z is price-savvy and value-conscious, so the category must be premium, but consumers must engage with it in the same way they engage with alcoholic drinks.”

*Siobhan Hamilton,
Commercial Director for Guinness*



NOLO Brands:

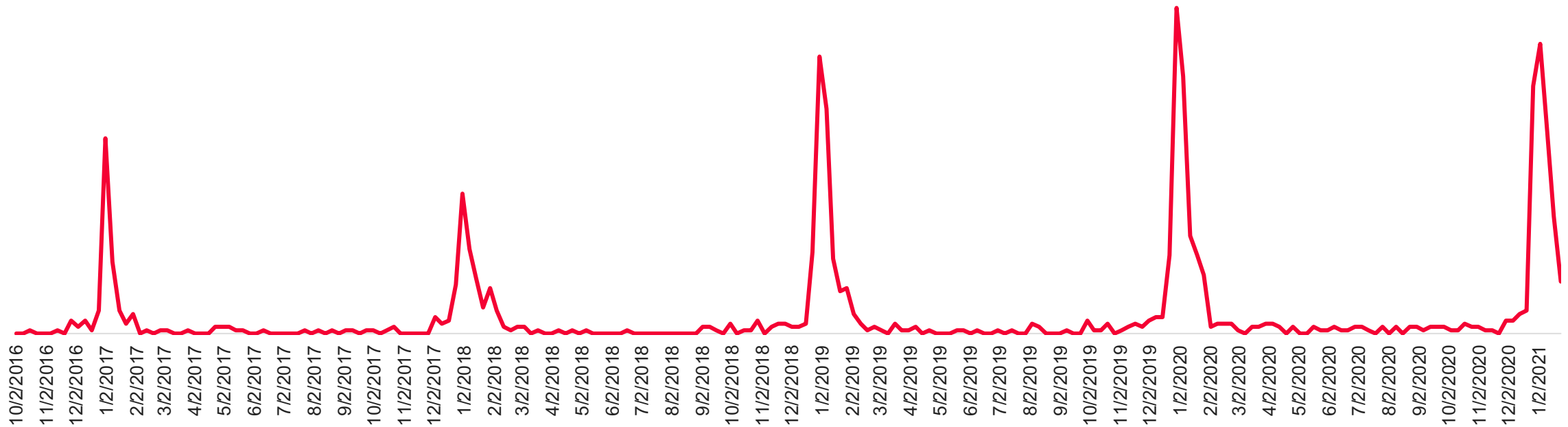
Coors Edge, L.A. Libations

“We're helping transform the Molson Coors Brewing Company into the Molson Coors Beverage Company. Within a month of unveiling its new name, Molson Coors made an important investment in beverage incubator L.A. Libations, a move aimed at developing a portfolio of “better-for-you” non-alcoholic brands.”

Pete Marino, President of Emerging Growth

As brands embrace the NOLO category, Dry January has become more of a cultural event

Dry January
(U.S. search interest over time)



WHAT IS DRY JANUARY?

What started as a campaign around increasing awareness of the health risks associated with alcohol in the U.K has transitioned into a **global cultural moment** where people engage with a re-set mindset and moderation in lifestyle.

Since its inception, the movement has grown quickly. In 2021, **13% of U.S. adults participated** in Dry January, up from 11% in the previous year.

Most participants are **younger legal age drinkers**, and the main reasons for participation included “trying to be healthier” and “trying to drink less overall.”



How did brands activate around Dry January in 2021?



Heineken 0.0 + The Bachelor

Leveraging the connection between NOLO and lifestyle, Heineken 0.0 ran a national commercial with contestants from The Bachelor, who toast to “seeing clearly.”



Budweiser Zero + Team Zero Athletes

Budweiser Zero assembled a squad of athlete ambassadors for a Team Zero campaign promoting Dry January, incorporating motivational emails and rewards atop a national TV campaign.



Truly's "Try January" Campaign

Truly Hard Seltzer, launched a "Try January" campaign and commerce microsite to promote the first alcoholic seltzer infused with tea, running contrary to the idea of alcohol abstinence.

Heineken and AB InBev led NOLO TV spend

Investment in Heineken 0.0 and Budweiser Zero led to increases in NOLO spend, spots, and airings



\$12.2M
NOLO TV Spend (Jan 2021), **+89%**

44%
of total megabrand spend (Jan 2021)

Primarily **Sports** and **Entertainment** spend



\$1.3M
NOLO TV Spend (Jan 2021)

2.6%
of total megabrand spend (Jan 2021)

Primarily **Sports** spend

Supporting the NOLO category

Thought Starters

Carving Out Areas of Ownership

As NOLO brands look to distinguish themselves from the growing pack, carving out areas of ownership among relatively untapped content areas such as News and Hispanic could allow brands to stand out and develop first mover advantages with key audiences.

Reaching Younger LDAs through Streaming

With NOLO's remarkable growth in the past few years powered by interest from younger legal age drinkers, brands can construct their marketing approach to most effectively target and heavy up on these audiences by incorporating streaming into their media approach.

Leaning into Tentpoles, IP, and Cultural Moments

With more NOLO launches forthcoming from big players, brands can leverage tentpole events, cultural moments, and IP to create buzz, build awareness around new offerings, and drive consideration and trial.



Thank you!

NBCUniversal