October 2025

The future of alcoholic beverages

From the living room to the bar

In brief

The drinking landscape in the UK is changing. From rising costs to conscious health choices, consumers are re-evaluating their alcohol consumption, especially younger and older drinkers. With both **cutbacks and evolving tastes,** this nationally representative research offers a detailed view of how drinking habits have shifted in just a year and how **age and gender** continue to shape what, where and how people drink.

Although we may not always realise it, our choice of drinks is surprisingly indicative of our generation. Everything from the type of soft drink we select at a restaurant, to how we share shots and whether we find attached caps annoying, links back to our prior experiences, culture, and expectations.

This report explores alcohol consumption at home and out-of-home, preferences for types of drinks, uptake of non-alcoholic options and attitudes toward pricing, painting a picture of a nation balancing tradition and transformation.

Methodology

Vypr is a leading global product intelligence and consumer insights platform **that helps brands make informed product decisions quickly and confidently.**

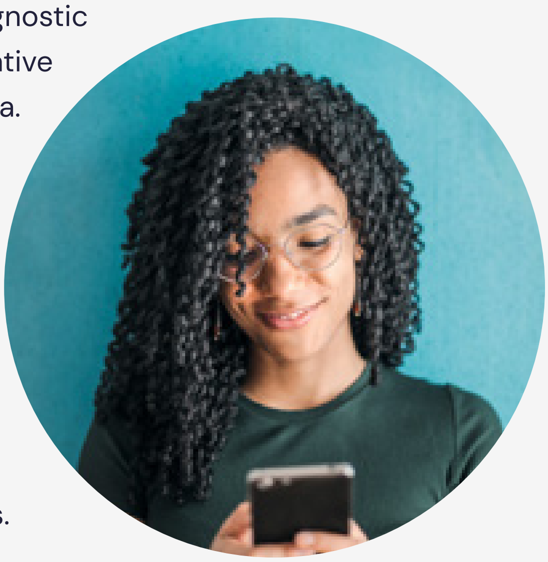
Our approach combines mobile-first research tools with engaged consumer communities, delivering insights that are accurate, actionable and agile. These principles guide how we collect and analyse data, ensuring it supports both immediate decisions and longer-term strategy.

Our methodology is rooted in behavioural science and focuses on capturing the immediate, instinctive reactions of consumers. Instead of lengthy questionnaires, our steers (quick questions) are short, targeted and optimised for mobile, gathering quick, intuitive responses that tap into System 1 thinking — the brain's automatic decision-making process responsible for most purchasing behaviour.

This approach helps brands accurately understand and predict consumer behaviour, act decisively on the evidence and **accelerate the creation of products that connect with their audiences.**

Research methodology

The findings in this report are based on research conducted between June 2025 and August 2025, using a mobile-friendly, device-agnostic application to collect feedback from nationally representative samples of 1,000 consumers in the UK and 200 in Australia. Representation in each market was based on the most recent population data to ensure proportional coverage across age and gender.



To provide a rounded view of consumer attitudes and behaviours, we combined quantitative and qualitative research methods, capturing both structured responses and open-ended feedback to explore the motivations, preferences and behaviours of consumers across markets.

Executive summary

The UK's drinking culture is in transition. Shaped by cost pressures, shifting health priorities, and evolving social behaviours, consumers are reassessing not just how much they drink, but **what, where, and why.** While traditional categories such as beer, wine, and gin continue to hold their ground, there is clear evidence of generational divergence in drinking habits. Younger consumers (18–24) are simultaneously driving growth in out-of-home occasions while also leading the **shift toward reduced or zero alcohol at home.** Meanwhile, men aged 35–44 emerge as the most engaged multi-category drinkers, fuelling sales across ready-made cocktails, low/no alcohol options, and IPAs.

Value remains a defining influence. Nearly three in four consumers (73%) believe pub and bar prices have risen too steeply, with many moderating spend or shifting occasions into the home. At the same time, flavour is the core battleground: from gin pairings that see tonic challenged by lemonade, to seasonal innovations like toffee apple shots, taste consistently outweighs factors such as brand trust or nostalgia.

Non-alcoholic drinks have edged into the mainstream, with over two-thirds (69%) of consumers purchasing them. Branded no/low alcohol lines are particularly popular with men aged 18–34, while older women are least likely to engage. Spirits, shots, and emerging categories also show strong generational divides: younger audiences lean into novelty and portability (mini bottles, sour shots), while older consumers favour tradition, premium quality, and sharing formats.

Overall, the UK alcohol market reflects both tradition and transformation. Brands that balance affordability with flavour-led innovation, while tailoring formats and messaging to life stage, will be best placed to capture the next wave of drinking occasions.

Key highlights

Women aged 18 to 24 are the most divided when it comes to alcohol. This group is the most likely to have both increased out-of-home drinking since last year and to have cut out alcohol altogether Page 4

Tonic is still the top mixer for gin, but lemonade is catching up fast with women aged 18 to 24, 1.7x more likely to opt for this blend. Page 8

Men aged 35 to 44 are the top customers for ready-made cocktails, putting 1.6x more into their shopping baskets than the overall average (42% vs 27%). Page 9

Fortitude Drinks Case Study

Two in three people (66%) buy shots at a pub or bar, classic shots like tequila and sambuca are the top choices Page 19

Younger consumers (under 35) are generally more drawn to unique flavours like blueberry matcha or spiced plum, while older customers tend to prefer classically sweet flavours. Page 20

Dive into our "future of alcoholic beverages" section to discover key insights and cross-sector takeaways.

At home, a friend's house or out? UK drinking patterns

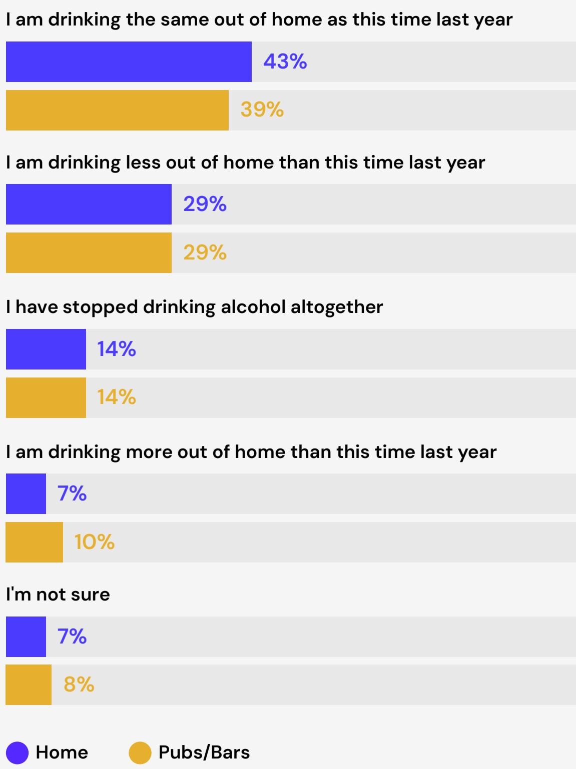
Both in the home and out in the pubs, most people self-report that they are drinking the same or less compared to last year. Just one in ten (10%) feel that they're currently consuming more out at bars, and fewer than this (7%) feel that they've increased their drinking at home.

Zooming in on those who have upped their intakes, men aged 35 to 44 are 2.9x more likely to have increased home drinking since last year, compared to the overall average (20% vs 7%). They are also getting more alcoholic beverages at bars, pubs and restaurants, albeit not as much as at home (18% vs 10%). This could imply that this group are still keen drinkers but increasingly prefer home comforts to the noise, cost and commute of a bar.

Younger men, such as those in the 18 to 34 age group, are also heading out to drink more than last year, more than their older counterparts. One in five (20%) of men aged 18 to 24 increased their out-of-home drinking, making them twice as likely to hit the streets for an alcoholic I am drinking the same out of home as this time last yearbeverage, compared to the population 43% average (20% vs 10%).

Out-of-home alcohol consumption among women aged 18–24 is on the rise, with 26% saying they're going out drinking more often this year, up from 23% in 2024. This growth stands out against the wider market, where overall figures have dropped from 16% to 10%. The contrast is even clearer when compared to one of the largest segments, men aged 25–44, who have seen a steep fall from 34% last year to 19% this year. Together, this points to a shift in market dynamics: younger women are driving growth while older male cohorts retreat, reshaping the out-of-home drinking landscape.

What is your consumption of alcohol in 1) pubs/bars/restaurants and 2) home?



Single-answer steer sent to a nationally representative sample

Interestingly, women aged 18 to 24 are also the most likely to have reduced their alcohol consumption in the home (34% vs an overall average of 29%), and to have stopped it altogether (20% vs an overall average of 14%). This paints a picture of cultural divergences within the 18 to 24 group, with some women hitting the bars harder while others lean into cleaner living.

Women in the following age groups were also more likely than average to have decreased their alcohol intake at home (34% of the 25 to 34 age group, 30% of the 35 to 44 age group, 29% of the 45 to 54 age group and 33% of the over 55s).

Making the most out of Vypr Predict

Expert insight tip from Chloe Wilk (Head of CIT)

The shift away from alcohol, red meat and HFSS products is challenging some categories, but out-of-home consumption tells a more balanced story. Younger consumers may be drinking less, but they're still seeking social and experiential occasions, which is positive news for a sector hit hard in recent years.

Traditional tracking in this space can be costly, inaccurate or too high-level to act on, particularly for lower penetration brands. Vypr provides a more agile alternative - helping out-of-home customers translate trend-based insights into concepts and validate them with consumers, ensuring decisions are grounded in timely, reliable intelligence.

Top tip: *Use agile testing to bridge the gap between trend tracking and validation, so you can respond quickly to shifting behaviours in the out-of-home market.*

Looking at the 29% of people who are drinking less at home this year, the overall feeling is neutral, with some positive undertones. For around two in three (65%) of this group, the motivations to cut back are practical or health-related, with affordability coming up fairly frequently. One in four (25%) of people express positive feelings such as a sense of empowerment, improved quality of life and better health.

Top 6 motivations to cut back on alcohol in the home

When it came to pubs, bars and restaurants, there was a clear trajectory between drinking reduction and age. Customers seem to be steadily decreasing the amount they drink out, up to a peak of 45 to 54 (34% vs an overall average of 29%) when it drops back down again.

1. Health & Wellbeing
2. Cost & Affordability
3. Change in lifestyle
4. Personal choice
5. Medical reasons
6. Pregnancy or parenting

“It's more expensive and health reasons.”

M 35 - 44

“I have just decided to cut back, it’s a lifestyle choice.”

M 55 - 64

Chin chin for gin

More than one in two (56%) people buy gin. Most of them (69%, or 39% overall) put it into their basket at the local store or supermarket to drink at home, while around one in six (17%) prefer to get a glass poured for them at a bar.

Tonic water remains the most popular pairing for gin. Almost two-thirds (65%) of people who buy gin at the supermarket or store will use it as a choice of mixer. Shoppers over the age of 55 are the most likely to do this (80% vs 65%).

Younger age groups are more open to alternative mixers. Women aged 18 to 24 especially enjoy combining gin and lemonade, doing so 1.7x more than average (54% vs 32% overall). Led by younger and female customers, lemonade is the second most popular choice.

Citric and fruity pairings are also appreciated, such as orange juice (15% of votes), grapefruit (12%) or the sweeter passionfruit (10%).

Men aged 35 to 44 are shaking up the most pre-made cocktails at home

More than one in four (27%) consumers buy ready-made cocktails and spirit mixers at least monthly. Men aged 35 to 44 are the top customers, putting 1.6x more into their shopping baskets than the overall average (42% vs 27%).

This could be connected to the increase in men aged 35 to 44 drinking at home (see above). They could be craving the cocktail flavours and indulgence of the bar alongside the creature comforts of being at home.

Low or non-alcoholic drinks edge into the main-stream

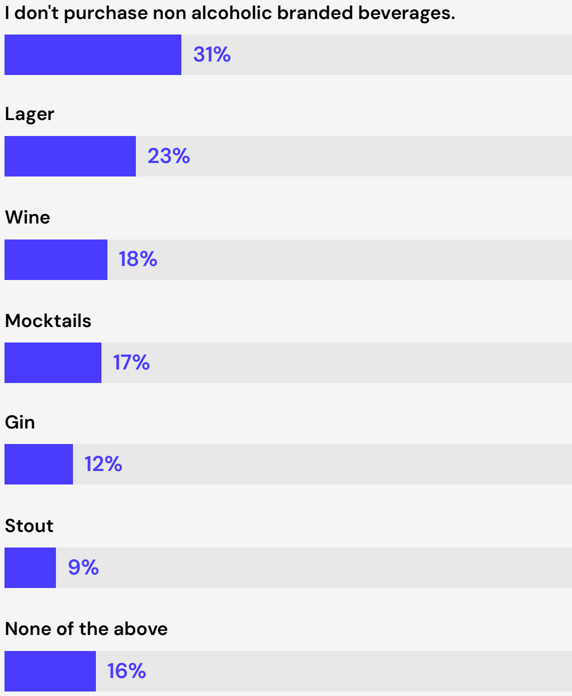
The UK drinking culture is starting to normalise non-alcoholic or low alcohol versions of classic drinks, with nosecco, 0% lager and mocktails all taking a growing market share. Today, picking up no or low alcohol alternatives has become standard for more than two-thirds (69%) of consumers.

Lager is the most popular choice, with 23% of votes. It is especially common for men aged 35 to 44, who are 1.9x more likely to put one in their shopping basket compared to the population average (45% vs 23%).

Low-alcohol or 0% wine comes in second position, with almost one in five (18%) votes, again driven by men aged 35 to 44 (27% vs 18%). This age group has come up several times in relation to home drinking as well as ready-made cocktails, suggesting that they are one of the most engaged in lower-cost (and potentially lower-hangover) drinking cultures.

In third place are mocktails (18% of votes), which are most popular with women aged 18 to 24 (32%).

What low or non-alcoholic beverages have you purchased (e.g. nosecco, 0% lagers)?



Multi-answer steer sent to a nationally representative sample

Whilst the majority of people have purchased some forms of low or no alcohol drinks, they do not buy non-alcoholic versions from alcoholic brands very often. Just one in five (20%) consumers do this at least once a month. Men aged 18 to 34 are the top consumers for branded non-alcoholic drinks, and they are 1.6x more likely to purchase them frequently compared to the rest of the population (33% vs 20%).

Older women buy alcohol free versions of branded drinks the least often. Those over the age of 55 are 1.4x more likely to have never put one in their shopping basket at all (61% vs 45% of the overall population). While women aged 45 to 54 are 1.5x more likely to only pop one in less than twice a year (30% vs 20%).

The data indicates that young men are the most frequent consumers of zero alcohol branded drinks. As we move further along the gender and age spectrum, older women are the least frequent consumers.

Guinness: The great global stout

Beyond the taste: from culture to health

Guinness is consumed by almost one in two (47%) people in the UK. However, not that many drink it often. Just 29% drink it at least monthly, 9% weekly and only 1% daily. Men are 2.3x more likely to drink Guinness at least monthly, compared to women (43% vs 19%). Instead, a surprisingly high (15%) proportion prefer to order a pint of Guinness just once a year. This suggests that it is viewed by around one in six as a drink for certain occasions such as St Patrick's day or possibly a trip to Ireland, rather than an everyday staple.

Slightly over half (57%) of people who drink Guinness stick only to Guinness, with a minority of this group trying other stouts (43%). Men are much more likely to venture into other stouts at 48% compared to only 35% for women in this same group. For the respondents who do not consume other stouts aside from Guinness, the majority commented that it is because they feel the taste is superior.

"Guinness has a much better flavour that other stouts", commented one participant. Along the same sentiment, many people felt that Guinness as a whole (not just the taste) is a premium beverage, or as one respondent put it, **"no other drink compares"**.

The availability factor is also a strong draw, as well as its powerful branding. "It's known as a premium drink", was a common sentiment. Significantly, the iron content also came up frequently. Some of Guinness' most famous early marketing campaigns were around health and vitality, such as "Guinness for strength", or "Guinness is good for you". This message has continued to transcend generations, with a handful of customers drinking it for the perceived iron content, even if they are not keen on the taste.

Most people spend around £10 on alcohol in supermarkets

Just over one in five (22%) people do not buy any alcohol at the supermarket, led by women aged 18 to 24 (30%). As the previous sections suggested, this group is split in terms of drinking habits, with some hitting the bars and clubs a lot more, while others are actively cutting back. This could help to explain why they are not putting bottles in their baskets as much as other demographics, as neither are drinking at home much.

Most people (56%) spend between £6 and £20 on alcohol in the supermarket each week. Overall, there is a slight preference towards the cheaper side (29% of people spend less than £10, while 28% go over).

Leading the way for those with a slightly more expensive taste, 45 to 54 age group are the most likely to veer towards the £20 mark (37%).

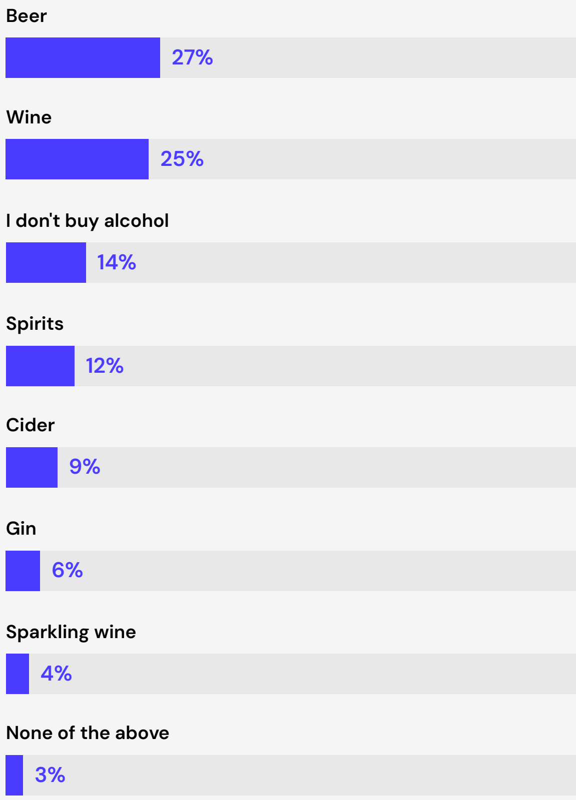
However, interestingly, men aged 45 to 54 are also the main drivers for the cheaper side of the spectrum, with 37% preferring to stay closer to the £6 price tag. This finding suggests that as well as being the largest consumer group, the 45 to 54 age group could be sitting in the middle, around the £10 mark with participants in this survey answering either side of this figure.

Just over one in ten (12%) shoppers spend more than £21 at the supermarket, driven by men aged 34 to 44. The top supermarket spenders are the men aged 18 to 24, who are almost three times (2.9x) more likely to splurge over £30 on drinks than average (14% vs 5%). This could imply that they are more likely to opt for higher ticket items, such as several bottles of spirits, possibly for pre-drinks with friends before heading out.

Across the whole UK, beer is the most frequently purchased alcohol. More than one in four (27%) pick this as their go-to drink. Men are more than twice (2.6x) as likely to grab a beer at the bar or store, compared to women (39% vs 15%). This is a trend which gets stronger with age, peaking with the 45 to 50 years men (50%).

Wine is the second most popular drink, with one in four (25%) pouring or ordering themselves a glass. This time, its women who drive consumption levels (29% of women selected wine as their most purchased alcohol, compared to 21% of men).
Almost one in two (47%) people buy India Pale Ales (IPAs) at least once a year, and more than one in three (36%) will pick some up at least monthly.

What type of alcoholic beverage is the one you buy the most?

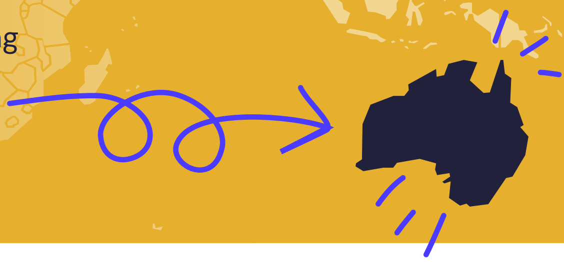


Single-answer steer sent to a nationally representative sample

Spirits come in third position, accounting for 12% of votes, this time led by women aged 18 to 24 (23%). As we see from previous sections, this group does not seem to be buying many spirits in stores and supermarkets, indicating that they could be more inclined to opt for a spirit at restaurants, bars or clubs instead.

Australian shopper spotlight

In contrast to the UK, wine is the most purchased alcoholic drink with 35% doing so, in comparison to the 28% that regularly purchase beer in Australia.



IPAs remain popular, led by men aged 35 to 44

Men aged 35 to 44 are the top consumers, they are 1.7x more likely to buy IPAs at least monthly (60% vs 36%). Men sitting either side of this age group are also among the most frequent buyers. More than half (55%) of men aged 45 to 54 and men aged 25 to 34 (54%) buy IPAs at least monthly.

Overall, IPAs are the most consumed alcohol for just under one in six (15%) people in the UK, driven by men aged 35 to 34 (35%).

The rising costs of alcohol leave some in low spirits

Almost three in four (73%) people have noticed the creeping prices in pubs and bars over the past five years. While most people (48%) are somewhat sympathetic to the plight of business owners in difficult economic environments, one in four (25%) think it's unfair to the customer.

We asked the panel what they would consider to be a fair price for their favourite pint of lager. Assuming the unit cost is £1, we calculated that the most profit-maximising price would be £4.38, hitting the sweet spot between affordability and value. After £4.94 there is a strong drop-off although 35-to-44 year olds are still willing to pay this.

Case study

Exploring how different generations drink, share and shop

Fortitude Spirits Group
Category: Alcoholic beverages

Fortitude Spirits Group is making bold moves in the alcohol category, building a reputation for standout innovation and premium production. This case study explores consumer behaviours around one of their key products: Cactus Jack's, a sour shot drink. The research uncovers when and where people drink shots, how preferences differ by age, and how factors like flavour, format and placement influence purchasing decisions.

Drawing on Vypr research with both nationally representative and targeted audiences, the findings offer a blueprint for how Fortitude can position Cactus Jack's to win across multiple generations and drinking occasions.

How different generations approach shots

The UK’s approach to shots like tequila, sambuca, cream-based, sour or fruity varieties is not universal. There are distinct generational shifts and patterns. The way that shot drinkers buy and share drinks is just as different as the places they chose to enjoy them.

For younger consumers, shots tend to lead up to the main event. Pre-drinks are the most popular environment for 18-to-34 year olds to enjoy shots, with more than two in five (41%) selecting this as the most normal situation. The data suggests that pre-drinking is usually a social activity, with 22% of 18-to-24 year olds enjoying shots at somebody else’s house. As the 18 to 34 age group leave their predrinks and head into the nightclub, the shots usually continue but to a lesser extent (at least 33%).

By contrast, for the older 55 to 64 age groups, shots are not a lead-up to the main event, they are part of the main event. More than one in four (27%) of this demographic enjoy them most at house parties or nights out (27%). Slightly less will pour a round of drinks as part of a drinking game.

18 – 34 years

Predrinks (41%)

Night out (35%)

55 – 64 years

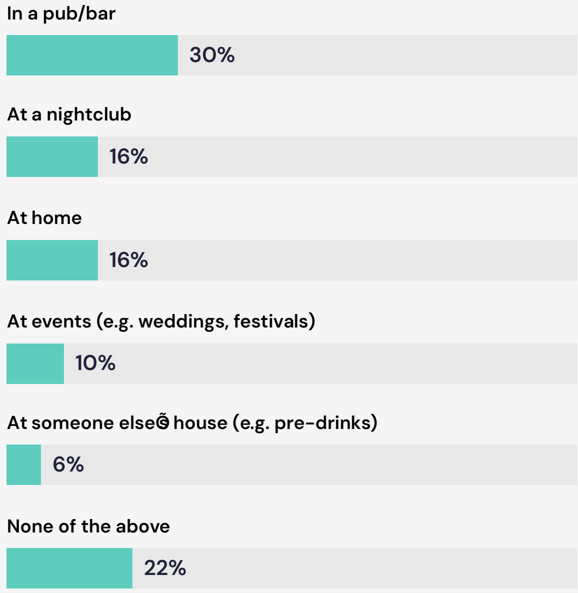
House party (27%)

Night out (27%)

Part of a drinking game (22%)

There is a limited appetite for shots at events like festivals or weddings (consumed here by just 10% of the population).

Where do you most often drink shots?



Single-answer steer sent to a nationally representative sample

Fortitude
SPIRITS GROUP

Shot preferences: Sour vs creamy vs classic

Two in three people (66%) buy shots at a pub or bar. Overall, they are most likely to stick with classic spirits like tequila or sambuca (25%), followed by cream-based shots like baby Guinness or Baileys (20%). Consumers aged 18 to 24 are especially keen on these sweeter, creamier versions (33%). Slightly over one in six (17%) are drawn to fruit or novelty varieties, including bubble gum and watermelon (17%).

Sour shots appeal to just under one in seven (14%) people, but they stand out as being the favourite for the 25 to 34 age group (27%). This could possibly be tied to some feelings of nostalgia, as affordable brands like Cactus Jack's, Apple Sourz or Mickey Finn were coming into prominence around the time that this group may have started drinking. For many, a sour shot could signify the taste of excitement or young adulthood.

This age group (25 to 34) is even more likely to buy sour shots in the supermarket to be drunk at home (37% vs an overall average of 19%). This could further reinforce the idea that the flavours are a fun or reminiscent way to start the night.

Generally, most people buy the same types of shots at home as they would in a bar or pub with similar patterns emerging between the two environments. Classic spirits remain the top choice for home drinkers (36%), followed by cream-based shots (24%), fruity or novelty shots (21%) then finally sour shots (19%).

Seasonal flavours have broad appeal

Almost three in four (72%) people would be at least open to trying a limited-edition flavoured shot for autumn, driven by the 25 to 34 age group and older.
The youngest consumers (aged 18 to 24) were the least interested, with almost two in five (38%) rejecting the idea.

For the people who would like to try an autumn-inspired limited edition shot, toffee apple and cinnamon emerged as the top choice, garnering 37% of votes. This would especially appeal to older customers, the 55 to 64 age group would be 1.3x more likely to try it than the population average (50% vs 37%).

Spiced honey also appealed to one in three (33%), earning second position. Blueberry Matcha was an interesting flavour choice. While less than one in three (31%) of the overall population were drawn to it, it resonated strongly with the 25 to 34 age range.

Spiced plum was another one which drew less than one in four (21%) votes overall, but would be a niche hit for 18-to-24-year-olds (67%), who were more than thrice (3.2x) as likely to vote for this flavour.

Classic sweet autumn flavours tend to appeal to broader audiences and especially older consumers. Meanwhile, distinctive flavours like spice or matcha tend to attract younger crowds.

Share or sneak in? Generational differences to bottle sizes

More than two in three (72%) people would bring a bottle of sour shots to a party or event. Most of them from this (45%) would opt for a large bottle to share around. However, younger groups who may be more cost sensitive (or possibly meeting people they don't know already) are more inclined to buy smaller bottles.

The 25-to-34 age group are the most individualistic when it comes to shots at an event, with 30% choosing to bring a pocket-sized mini bottle for discreet personal use, three times (3x) the average (10%).

Share or sneak in? Generational differences to bottle sizes

Meanwhile, 18-to 24-year-olds are the most likely to bring a small bottle of sour shots that they can share with a friend (37% vs an overall average of 24%).

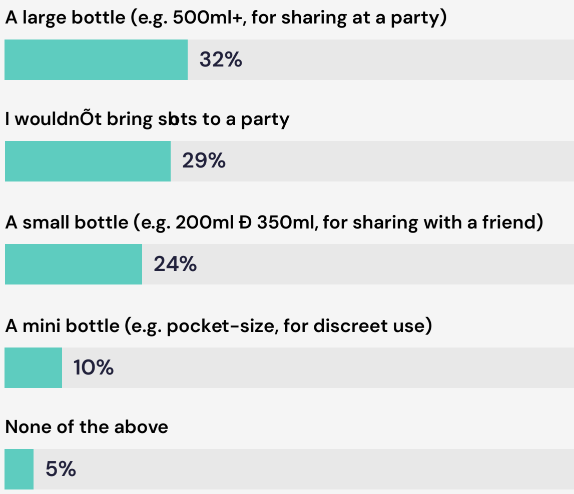
This sheds light on the varying generational attitudes towards drinking. The data suggests that younger people may view shots as a lead-up to the night out, preferring to save money and share less. While for older people, sharing the shots are the night out is at the heart of socialising with friends and new acquaintances.

Focusing in on the people who buy mini bottles of sour shots, they are most likely to buy them for social and celebratory moments, especially on nights out, house parties and special events like barbecues or birthdays. They are most popular in fun, low-pressure environments where novelty and sociability are high.

The individual bottles are considered celebratory and light-hearted, which opens a second competing theory. It could be that younger people prefer to hand out smaller bottles to their friends (possibly discreetly, away from the bartender's eye in a club or pub) rather than pouring many shots from a large bottle.

The novelty factor could be an important element for this group as they seek to delight with moments of fun and surprise.

Which bottle size for sour shots would you bring to a party/event?



Single-answer steer sent to a nationally representative sample

Sour shots are best placed on a liquor shelf within eyeshot of the beer aisle

When it comes to product placement, sour shots would be best positioned on a shelf with other liquors and spirits. Almost one in four (23%) of people would notice a bottle there compared to 19% at the end of the aisle, 18% on a dedicated stand or 8% by the tills.

Older consumers aged 55 to 64 are 1.7x more likely to appreciate a dedicated stand (31% vs 18%).

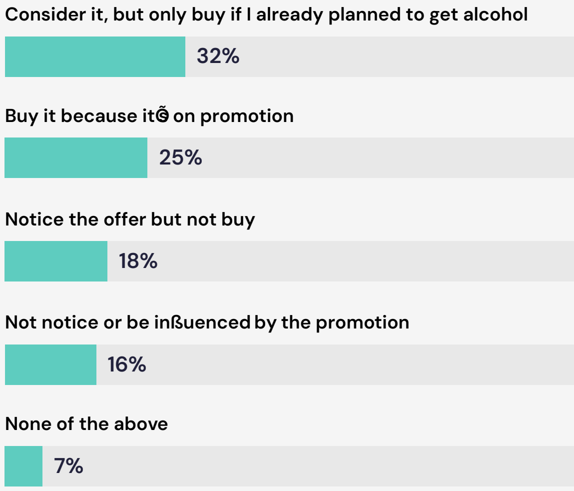
More than two in five (44%) people would consider buying a bottle of sour apple if it caught their eye near the beer section of a supermarket, especially 18-to-24-year-olds who would be 1.6x more likely to clock it (70% vs 44%).

If a large bottle of sour shots were reduced from £10.50 down to £8.25, one in four (25%) shot drinkers would be tempted to buy it because of the promotion alone. Almost three in five (58%) would purchase it either because of the promotion alone, or because they planned to buy it anyway (32%).

The brand of supermarket or store where the promotion is displayed makes a difference, with a strong skew towards premium retailers. Among shot drinkers who shop at Booths, all (100%) said they would be likely to buy the reduced bottle. This compares to 67% of those who shop at M&S, 63% at Co-op, 50% at Iceland, 48% at Morrisons, 50% at Waitrose, 42% at Sainsbury's, and 40% at Tesco.

If a friend brought flavoured shots to a party, more than four in five (84%) would be open to trying one, although for some (37%) it would depend on the flavour. Younger generations are more likely to give them a go, whereas older generations are slightly more cautious about the flavour.

At a store, a bottle of sour shots is usually £10.50, but it's currently £8.25. Do you..



Single-answer steer sent to a nationally representative sample

Summary

The research reveals a clear link between shot consumption and sociability, with strong generational differences shaping how, when and why people choose sour shots. Younger consumers (18–34) see shots as part of the pre-party ritual, often bought in smaller bottles for portability, convenience or novelty. In contrast, older drinkers treat shots as part of the main event, often favouring classic or cream-based varieties to share with others.

Flavour innovation is welcome, especially seasonal, nostalgic profiles like toffee apple and cinnamon but interest varies by age. Whilst younger audiences lean into bold or niche flavours like blueberry matcha or spiced plum, older groups prefer familiar autumnal tastes.

Purchase behaviour is heavily influenced by in-store visibility and price promotions, particularly when shots are positioned near beer or cider. Mini formats and flavoured variants thrive in settings that prioritise fun, flexibility and informal group occasions.

Applying the insights

This research offers a detailed understanding of how consumers engage with sour shots and how preferences shift by age, flavour, occasion and context. It helps Fortitude Drinks sharpen the positioning of Cactus Jack's to meet demand across key usage moments and retail channels.

To take these findings forward, Fortitude Drinks and retail partners may wish to consider the following next steps:

Lean into occasion-led formats develop messaging around common shot moments like pre-drinks, house parties and celebrations. Position mini bottles as ideal for gifting, pocket-sized convenience or light-hearted sharing at group events.

Refine in-store placement strategy, place shots near beer and cider to tap into impulse behaviour, especially among 18–34s. Consider dedicated endcaps or dual-siting opportunities to boost visibility.

Segment messaging by generation, younger audiences respond to fun, convenience and novelty. Older shoppers prioritise flavour familiarity and social sharing. Tailor bottle sizes, language and positioning accordingly.

Focus flavour innovation on seasonal launches, create limited-edition flavours with broad appeal (e.g. Toffee Apple & Cinnamon), while also testing niche variants that target younger audiences (e.g. Blueberry Matcha). Use seasonal drops to build urgency and social trial.

Support promotions with purpose, price drops can drive impulse trial but tie them to broader campaigns such as new flavour launches or event occasions to build relevance and memorability.

These actions can help Fortitude Drinks align product, format and marketing strategy to the distinct needs and behaviours of sour shot drinkers delivering standout impact both in-store and at the party.

Key takeaways

1. 35–44 males – the most engaged multi-category consumers

Men aged 35–44 emerge as the most engaged consumer segment across multiple categories, from home drinking growth and ready-made cocktails to IPAs, low/no alcohol lager and premium price tolerance for beer. Over the next year, brands should recognise the importance of this group's breadth of engagement and spending power, while also identifying untapped opportunities among other segments that have yet to reach the same level of cross-category involvement.

2. Compete on taste in low/no alcohol

With over two-thirds of consumers purchasing low/no alcohol drinks, the battleground is shifting from awareness to preference. Large-format lagers and mocktails lead the category but men 18–34 are key adopters of branded non-alcoholic lines. Over the next 12–18 months, successful brands will balance authenticity, flavour appeal and clear positioning, especially when extending from existing alcohol brands.

3. Match flavours and formats to life stage

Autumnal limited editions such as toffee apple and cinnamon appeal broadly, while distinct flavours like spiced plum resonate with younger consumers seeking novelty. Older consumers prefer lager bottles for sharing while younger drinkers lean into smaller, individual formats for cost control and novelty value. Aligning flavour releases and pack formats to life-stage drinking habits will drive both uptake and repeat purchase.

Conclusion

The future of alcohol in the UK is defined by divergence. Consumers are drinking less overall, but in **more intentional ways shaped by cost, health, and lifestyle**. Younger audiences drive experimentation, whether through low/no alcohol, seasonal flavours, or novel formats designed for sociability and fun. **Older consumers, in contrast, remain loyal** to established tastes and brands, rewarding consistency and perceived value.

This duality creates both challenge and opportunity. Established categories such as beer, wine, and gin remain resilient but must adapt to shifting consumption patterns, especially as younger cohorts place experience and variety at the heart of their choices. The rise of low/no alcohol products shows that moderation does not equate to disengagement, but rather a **demand for alternatives that feel authentic, flavourful, and affordable.**

For brands, success will come from segmenting strategies by life stage, **investing in flavour innovation that resonates with different generations**, and ensuring price points align with consumer expectations. Above all, the market rewards those who understand that while the UK may be drinking less, it is drinking smarter with quality, occasion, and value driving the choices that will shape tomorrow's industry.