THE STATE OF SOBER SOCIALIZING 2023

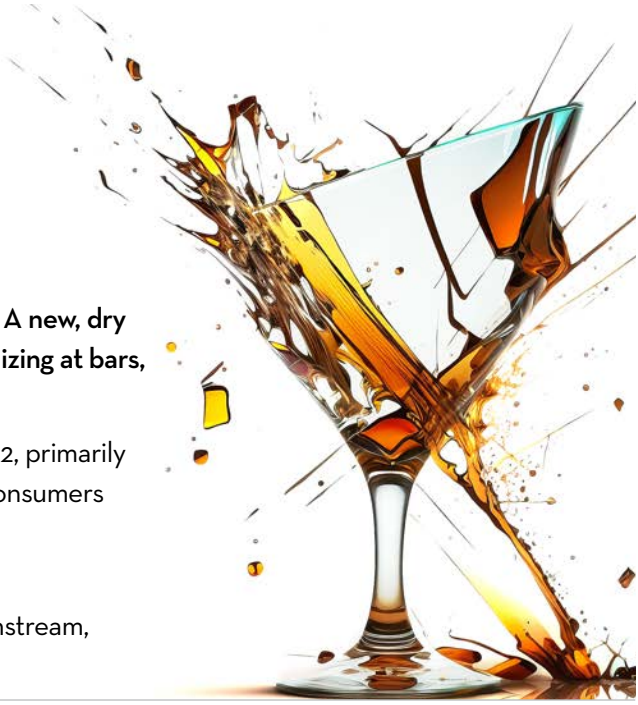
A look at how the drinking world is responding to the new dry culture.



An annual study by

BARE
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The sober movement is here to stay



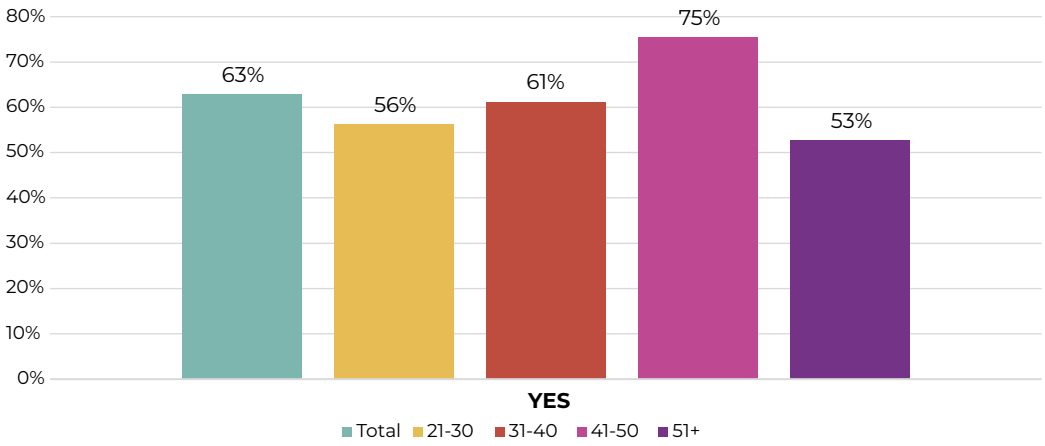
The era of boozy brunches, binge drinking, and bottle service has faded away. A new, dry culture has arrived which has unearthed challenges to existing norms of socializing at bars, restaurants, and parties that have been in place since the post WWII era.

Two-thirds of American adults consciously intended to drink less alcohol in 2022, primarily fueled by health and budget concerns. This mindset, held by 64% of younger consumers (ages 21-30) and 50% of all adults who drink alcohol, will continue into 2023.
That's almost 100 million people!

It is abundantly clear that mindfulness, moderation, and sobriety are going mainstream, as is consumption of non-alcoholic beer, wine, and spirits.

Drinking less alcohol this year was intentional for nearly two-thirds of adults

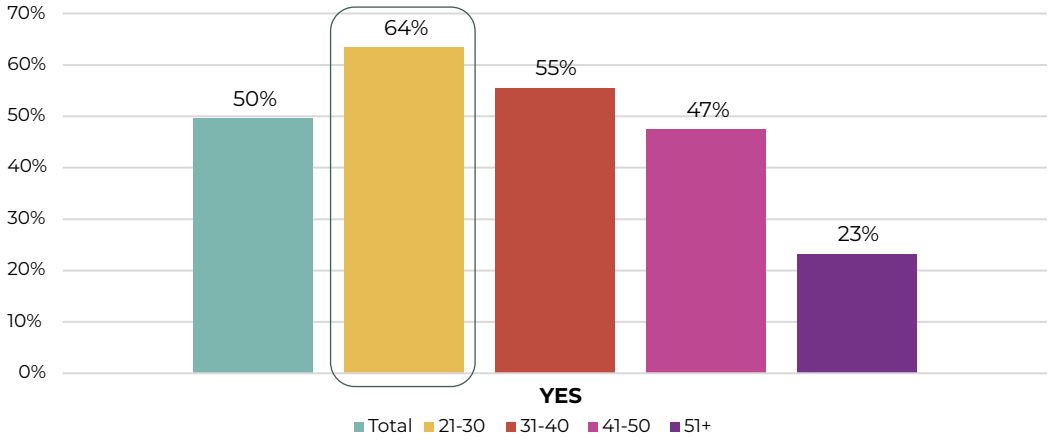
n=212 (those who drank less alcohol in 2022)



Did you intentionally decide to drink less alcohol this past year than before?

Half say they plan to drink less in 2023

The move to drink less in 2023 is more pronounced by younger adults (21-30) than any other generation
n=862 (those who drank alcoholic beverages this year)



Do you plan to reduce the amount of alcohol you drink in 2023?

Methodology – Quantitative survey of 1,020 adults 21-70 in the US, distributed across all regions, ages and approximately half male and half female. The survey was conducted by Toluna on December 14 – 15, 2022 using an online data collection methodology.



Two worlds collide in a new dry culture

As the sober-curious movement grows, with it, new socializing norms and behaviors will continue to emerge. **BARE Zero Proof's first annual "The State of Sober Socializing"** unpacks the changing motivations of those who choose not to drink alcohol, aims to track the evolution of this behavior change and its impact on socializing norms, and examines how the drinking community and the hospitality industry are addressing the needs, desires, and expectations of this emerging community.

As consumers experiment with alcohol-free socializing, they are navigating new territory within the established drinking culture attached to casual as well as special occasions. They desire acceptance and inclusion. They want allies who support and amplify this new way to have a good time. In addition to seeking support and empathy from their friends and family, they look to bartenders, servers, and restaurateurs to support the new dry culture with knowledge, a welcoming atmosphere, and great-tasting, elevated non-alcoholic beverages they are proud to hold.

What our research uncovered is what those who do not drink alcohol want from culture, bars/restaurants, friends and family and what they actually experience, are at odds.



Dry January: An on-ramp into the dry culture with bumps

The expedited integration of non-drinkers into a social and bar culture that has historically favored drinkers, creates an interesting new dynamic between those who drink alcohol and those who don't.

A significant majority of drinkers (71%) say they have someone close to them who does not drink alcohol. While the cross over between alcohol drinkers and non-drinkers is significant, there is a disconnect between them in how they experience social settings. That rift is most dramatic between those who drink alcohol and the sober curious (e.g., those who participate in Dry January or Sober October).

66% of regular alcohol drinkers say that bonds are stronger when both parties drink, but only 17% of those who rarely or never drink alcohol think this.

Overall, 21% of rare or non-drinkers say they feel left out in social situations. 56% of past Dry January participants feel the same.

Those who struggle the most to find support in mixed company are not those who have been sober for some time, but instead those who are regular drinkers who take opportunities to cut back (e.g., trying Dry January, Sober October, etc.).

Nearly 7 in 10 of all respondents (alcohol drinkers and non-drinkers) say they wish social settings were more conducive to accommodating those who drink alcohol and those who do not. The most uncomfortable for non-drinkers are bars and house parties.

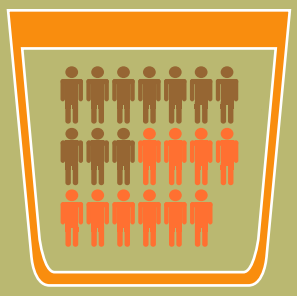
Good Vibes Only

The leading reasons for not drinking alcohol are ***positive*** motivations such as preserving long-term health, eliminating hangovers, and concerns about taste and cost. However, those who don't drink alcohol are not always met with a ***positive*** response. Instead, roadblocks and deterrents to experimenting with a sober experience are common. A lack of empathy, respect for privacy, and consideration is widespread, and those who feel it the most are Dry January and Sober October participants.

If past Dry January participants' experiences are any indication, the biggest downside to being sober curious may just be how you experience it with those who drink alcohol.

Those who do not drink alcohol are more likely to feel left out, most noticeably amongst Dry January participants (59%) and 4 in 10 feel like they are bringing the party down. It's not surprising, as they may be asked by those they are with, "why aren't you drinking?" or made faces at, told they are disappointing their alcohol-drinking friends, or "no fun" because they are not drinking. Some may even be asked if they have an "alcohol problem." 50% of regular alcohol drinkers admit to even excluding someone that doesn't drink alcohol from a social gathering.

To be fair, there are also those who support sober friends and family, but negative reactions tend to dominate.

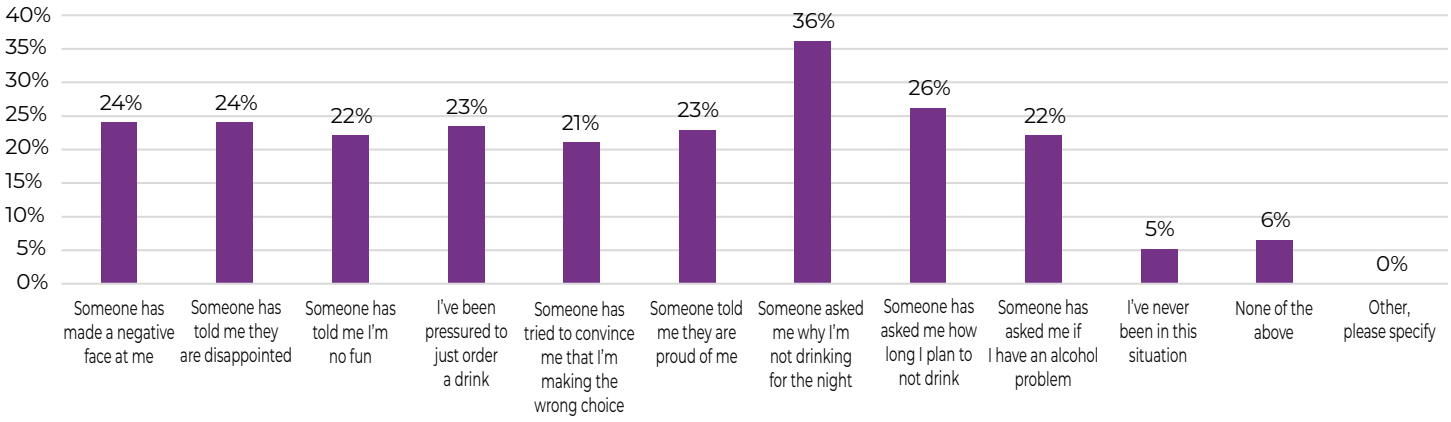


50%

of regular alcohol drinkers admit to excluding someone (from a social gathering) that they know to not drink alcohol.

Dry January participants experience the coldest reception from their alcohol-drinking friends and family for not drinking, more so than those who don't drink or rarely drink alcohol.

n=371 (Dry Jan Participants)



Which of the following have happened to you if you've ever been in a social situation when you say you're not drinking alcohol for the night? (Select all that apply)



The Socializing Clash

Here are some experiences of past Dry January drinkers that show that socializing culture has a long way to go to make those who don't drink alcohol feel included without hesitation.

Faces that don't signal support

25% of past Dry January respondents have had a face made at them by their friends or family members when they disclose they aren't drinking alcohol.

An inquisition

36% of past Dry January respondents have been asked why they aren't drinking and 3 in 5 alcohol drinkers admit to asking. 62% on the receiving end of that question agree that they hate when people ask them that.

A timeline for how long their sober-curiosity will take

Nearly 1/3 of past Dry January respondents said they are asked how long they intend to not drink alcohol.

Outward disappointment

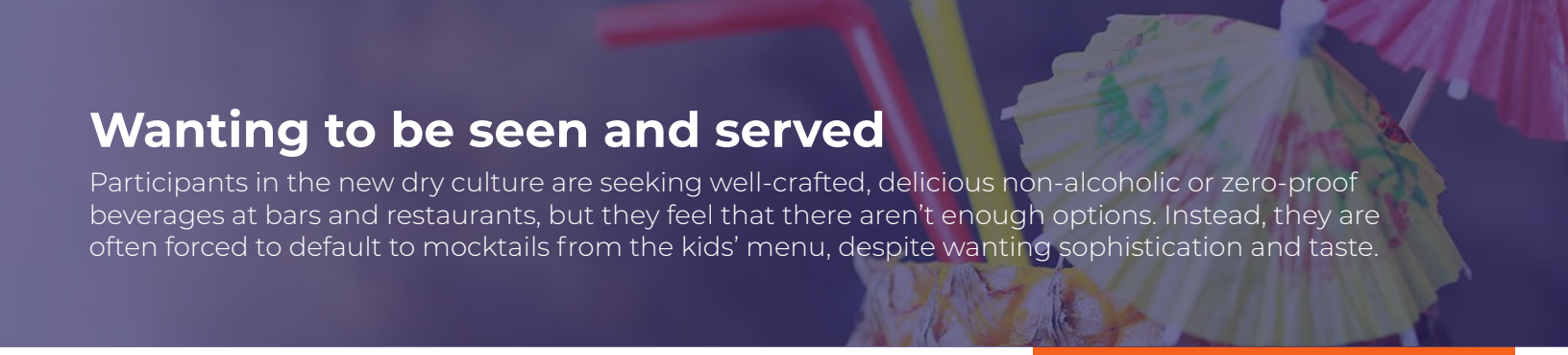
24% of past Dry January participants have been told by their alcohol-drinking friend or family member that they are "disappointed," when they disclose they are not drinking.
22% have been told they are "no fun."

Good old-fashioned peer pressure

71% of past Dry January participants feel pressured to drink alcohol around drinkers and 23% of past Dry January respondents say they have actually been pressured to order an alcoholic drink by their friend or family member when they are abstaining.

Feeling sidelined

56% of past Dry January respondents say they feel left out when they don't drink alcohol around friends or loved ones and it isn't just a feeling. Nearly half of alcohol drinkers have admitted to leaving their sober friends and family out of plans.



Wanting to be seen and served

Participants in the new dry culture are seeking well-crafted, delicious non-alcoholic or zero-proof beverages at bars and restaurants, but they feel that there aren't enough options. Instead, they are often forced to default to mocktails from the kids' menu, despite wanting sophistication and taste.

More than half of adults wish more bars and restaurants had any/more non-alcoholic or zero-proof options, led by past Dry January participants at almost 70%.

55%
of all respondents wish more bars and restaurants had any/more non-alcoholic/ zero-proof options

	% agree
Don't drink alcohol	46%
Dry January participant	68%
Regular alcohol drinkers	64%

Almost 70% of past Dry January participants, 64% of regular alcohol drinkers, and 46% of those who abstain from alcohol wish bars and restaurants had any or more zero-proof options.

More than a third of adults feel uncomfortable ordering soda or substitutes from a bartender/server and nearly half wish they could order a non-alcoholic beverage that is less obvious.

35%
Feel uncomfortable ordering soda/sparkling water/juice from a bartender or server

	% agree
Don't drink alcohol	13%
Dry January participant	56%
Regular alcohol drinkers	50%

44%
Wish I could order a non-alcoholic beverage that is less obvious to others that I'm not drinking

	% agree
Don't drink alcohol	22%
Dry January participant	65%
Regular alcohol drinkers	58%

Those who aren't drinking alcohol would order a zero-proof cocktail instead of a soda or juice to...



BLEND IN

31% of those who are abstaining from alcohol would order a zero-proof or non-alcoholic drink to fit in.



FEEL MORE SOPHISTICATED

Almost 30% of past Dry January participants would order a zero-proof cocktail instead of a juice or soda to feel more sophisticated.



TO ELIMINATE AWKWARDNESS BETWEEN THEM AND THE SERVER

28% of past Dry January participants would order a zero-proof drink to avoid feeling awkward to a bartender or server.



BUT OVERWHELMINGLY, THEY WANT SOMETHING THAT TASTES BETTER

Taste is by far the biggest reason those who aren't drinking alcohol would trade in a soda or juice for a zero-proof cocktail. 37% of past Dry January respondents think it would taste better.

Becoming an Ally in The New Dry Culture

As drinking behaviors change, the culture of happy hours, parties, sporting events, bars and restaurants must inevitably evolve to embrace the growing population on the sober journey for a night, a month or a lifetime. **Respecting the new dry culture as a friend or hospitality professional means adopting new do's and abandoning don'ts.**

FOR FRIENDS AND FAMILY

Do

Offer support, encouragement and positivity

Include your non-alcohol drinking friends in your social occasions as you normally would

Be happy with the choice your friend or family member has made, no matter how long it lasts

Include zero-proof options if hosting an event

Help your family member or friend find the zero-proof options on a menu

Don't

Ask why someone isn't drinking alcohol

Make a face that signals disappointment when a friend or family member declines alcohol

Ask them how long they plan to not drink alcohol

Pressure someone to order a drink

Exclude a non-drinker

Feel guilty for drinking alcohol (if that is your choice)

Assume the non-drinker doesn't want a crafted cocktail

FOR THOSE IN THE HOSPITALITY INDUSTRY

Do

Be positive and open-minded with patrons who want a non-alcoholic drink

Improve visibility and variety of the zero-proof cocktails you serve

Make/serve zero-proof cocktails that are adult, sophisticated and above all, tasty

Suggest non-alcoholic and alcoholic cocktails equally

Use the term non-alcoholic and zero-proof instead of mocktails

Don't

Ask why someone isn't drinking alcohol

Pressure someone to order a drink

Assume the non-drinker doesn't want a crafted zero-proof cocktail

Assume the non-drinker doesn't care about how their drink tastes

Don't use the term mocktail

Bury the zero-proof options at the back or bottom of the menu

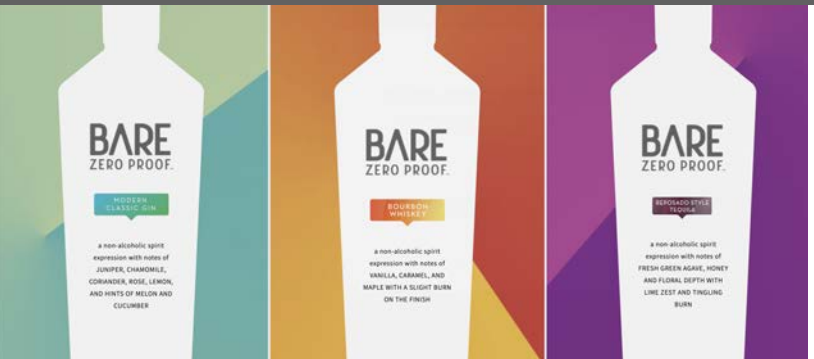
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CHEERS TO THE FUTURE OF ZERO-PROOF SOCIALIZING!

The emergence of the new dry culture is changing the rules of socializing and challenging alcohol drinkers, bartenders and bar owners to provide equitable treatment to those who do not drink alcohol. From the perspective of those who have decided to embark on a sober journey, feeling free, welcomed, and accepted by others regardless of what they are drinking should be today's reality. According to "The State of Sober Socializing," there is work to be done to make social occasions equally enjoyable for those who drink alcohol as those who do not. BARE Zero Proof will continue to monitor progress in this space and report our findings each year as uptake of an alcohol-free lifestyle grows. **We are dedicated to supporting consumers as well as bartenders and owners as they navigate this emerging dry culture.**

"At BARE Zero Proof, we are on a mission to advocate for and support this seismic shift to the new dry culture. We believe that inclusion transcends your choice of drink. All people have the right to make the most of every night out, celebration, concert or game without reservation or embarrassment. BARE Zero Proof Bourbon, Tequila and Gin make sophisticated, great tasting cocktails you are proud to order and enjoy. We raise a glass to you, whomever you are, and however you choose to enjoy life. We believe that when your choices are accepted you truly can be yourself."

– James Kempland, Founder, BARE Zero Proof



For media inquiries or more information on this study, please contact: brittany@sedcommunications.com

For more information about BARE Zero Proof, please visit our website www.enjoybare.com

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