BRAND JOY LAB

THE 10/10/10 REPORT

PREPARED FOR OVERTIME



MADE-UP BRAND.
REAL INTELLIGENCE.

We created a fake NA beer to show the real potential of Brand Joy Lab to find emotional blindspots.

OVERTIME

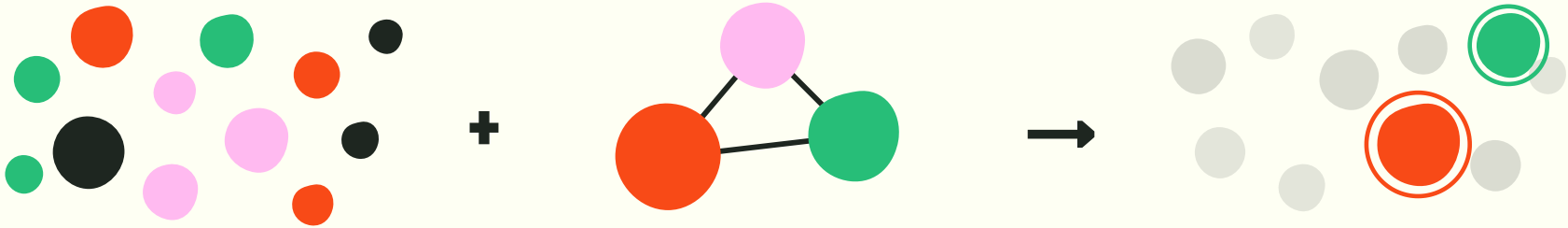
Overtime Lager is not real, but it could be, because Brand Joy Lab identified several ways that NA beer brands are leaving joy in the can.

This report shows how a challenger could win on price, occasion and message, with opportunities to match.



HOW THE LAB WORKS

Brand Joy Lab research, checked against what's happening in the market, turns into opportunities you can trace back to a data point. Every number in this report carries its sample size and date.



BRAND JOY LAB RESEARCH

2.4 million data points from 15,300 respondents, three years (August 2023 to September 2026), 70,000 open-ended answers. About 400 new respondents a month.

MARKETPLACE SIGNALS

What consumers say on Reddit, reviews and forums. What brands and markets show in news and ad libraries. What culture and competitors do on social and in partnerships.

CLEAR OPPORTUNITIES

A set of moves for the brand to press its emotional advantage, always informed by Brand Joy Lab research and what we see in the market.

BRAND JOY LAB

TEN OPPORTUNITIES IN TEN DAYS

We looked at the category, checked the competition, checked all sixteen places a brand can bring your customer joy and found the three where this customer's joy runs highest, and built ten moves, each with a first step and a way to measure it.

Overtime is one brand in one category. The same map exists for yours.

PETER MAYER



THE SITUATION

JOY INDEX · NON-ALCOHOLIC BEER

11 **out of 100**

Joy Index runs from -60 to 100.

The lowest of any drink we have ever measured, with four in ten people negative on it.

AS WE OFTEN FIND, CONSUMER JOY IS LURKING IN UNEXPECTED PLACES.

Overtime makes a non-alcoholic lager in a category that is growing fast and bringing almost nobody joy.

Non-alcoholic beer scores a Joy Index of 11 out of 100 in the Brand Joy Lab, the lowest of any drink we have ever measured, with four in ten people negative on it. The category has grown anyway by selling what the product lacks: the alcohol, the calories, the hangover.

Brand Joy Lab, Feb 2026, n=355.

THE PLAYING FIELD

Non-alcoholic beer has been in the Super Bowl since 2023, in the Premier League, the Olympics and Formula 1, and in more than 60 of Athletic's own sports deals. What we found is how they do it: through big-event sponsorship, athletes and moderation messages. We reviewed each brand's own channels, its paid ads, and fan conversation online in the week of October 8, 2026.

BRAND	WHAT THEY SAY	WHERE THEY PLAY	WHAT THEY LEAVE OPEN
Athletic Brewing (leader or co-leader, depending on source and year)	Crafted for all. Calories, workouts, chores, weekday adventures, a $10.99 price cut	Brunch, post-workout, the pub, the after-party	**The living room, the tailgate, game day itself. Eleven active ads, zero sports creative**
Heineken 0.0	Cheers with no alcohol. Now you can	Super Bowl (2023), Formula 1, Champions League	**Weekly American sports. No active US paid social on the category**
Guinness 0.0	Same pint, no alcohol	Premier League, rugby, the pub	**The home. No active US paid social on the category**
Corona Cero	Official beer of the Olympics	Global games, Canadian Olympic Committee	**The weekly game and the drive to it**
BERO (Tom Holland)	The full beer experience without the alcohol	Premium variety packs, glassware bundles at $48.50	**Anyone who buys beer by the 12-pack**

THE CONSUMER PLAY

The Overtime drinker is the beer drinker. They just want one more, and they don't want to feel bad about it.

People who never drink reject non-alcoholic beer outright (-23 Joy Index). People who drink weekly or more are the only group warm to it (+29 Joy Index). The industry already knows this in sales terms: NIQ reports that 93% of non-alcoholic drink buyers also buy alcohol. What the Lab adds is where that buyer's joy actually lives: 86% of them call themselves sports fans, and their joy rises hardest at the tailgate, in front of the game, at home, and at the start of football season.

That gives Overtime a clear job: the fourth beer of the beer drinker's game day. Not a substitute for drinking, and not a moderation message. One more.

−23

Non-drinkers

+29

Weekly-or-more drinkers

9.8 MILLION

U.S. adults 21 to 54

Joy Index for non-alcoholic beer, by how often people drink.

Brand Joy Lab, Feb 2026, n=63 non-drinkers, n=161 weekly-or-more drinkers. Sports fans: n=2,444, Aug 2024 to Feb 2026. Audience size: MRI-Simmons, Spring 2026.

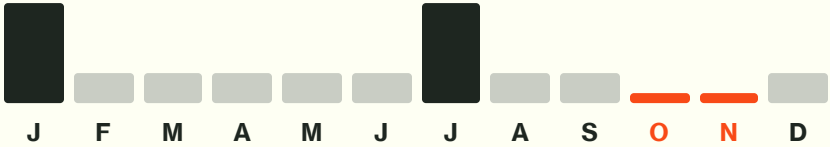
THE OPEN SEASON

THE ENTHUSIASTS

1. **Busch NA**
2. **Corona NA**
3. **Guinness 0**

The enthusiast community on r/NABEER ranks Busch NA, Corona NA and Guinness 0 in its top five, which says even the devoted want beer that drinks like the beer they already know. Athletic is now the official non-alcoholic beer of the NHL and put its name on the cooler at college games, so the open ground is the fan at home, not the fan at the venue.

THE EMPTY CALENDAR



Illustrative. Peaks and troughs from US search interest; bar heights not to scale.

US search interest for non-alcoholic beer peaks at New Year and July 4 and bottoms in October and November, the exact months the beer drinker rates highest.

Three things we could not find any competitor doing: speaking to the fan at home rather than the athlete or the venue; selling the product as a treat rather than a health or moderation choice; and owning the fall.

YOUR EMOTIONAL ADVANTAGE

We scored all sixteen places a brand can bring someone joy for Overtime's customer, the weekly-or-more drinker. Three stand well above his own baseline, and none of them is where the category's money goes.

+19

HOME & SANCTUARY

The household is where this fan’s joy runs highest. The sponsorships sit in stadiums.

+15

PROVIDING & CARE

The giver’s joy: bringing the cooler, stocking the fridge, hosting. The owned media is about workouts and calories.

+10

RITUAL

The daily liturgy: the first drink of the evening, the last one before the drive home. No competitor message sits here.

Brand Joy Lab, Aug 2023 to Sept 2026, n=4,526. The full sixteen-territory map, with competitor presence and effort ranking, is part of the Joy Map.

TEN OPPORTUNITIES

Ten moves, each built on a finding from the Lab and sized against the drinker on page 7. The creative work belongs to Overtime's team; this report names the ground to own and the decisions that get the brand there.

1 **The official non-alcoholic beer of proud beer drinkers**

2 **Own the couch**

3 **The last one**

4 **Never say sober**

5 **Priced like Modelo**

6 **The weeknight pour**

7 **Treat, not wellness**

8 **Our New Year is kickoff**

9 **Bring the cooler**

10 **The plate is the entry point**

OPPORTUNITY 1 OF 10

THE OFFICIAL NA BEER OF PROUD BEER DRINKERS



THE MOVE

Make Overtime the fourth beer of game day, for a fan, never a substitute for drinking.

THE FINDING

People who drink weekly or more are the only group warm to non-alcoholic beer (+29 Joy Index; non-drinkers sit at -23). Inside that group, this fan feels no penalty for a drink without alcohol and no special love for beer. He is there for the game. MRI-Simmons counts 9.8 million of him.

TACTICAL DECISIONS

Define the audience in every media and retail brief as the weekly drinker who watches football. Treat the second cocktail, not another beer, as the drink Overtime replaces.

HOW WE MEASURE IT

Share of first-time buyers who already buy beer (retail panel), target 70% or more. Brand joy among weekly drinkers, measured again in the Brand Joy Lab after one season, target +10 points over today's category score.

Brand Joy Lab, Feb 2026, n=63 and n=161. MRI-Simmons, Spring 2026.

OPPORTUNITY 2 OF 10

OWN THE COUCH



THE MOVE

Claim game day at home while competitors sponsor the stadium.

THE FINDING

Watching his team on TV is the single best predictor of this fan's joy. TV is his main entertainment, radio even more so, and social media is not. Nine in ten have a phone in hand while the game is on. Competitors' sponsorship money sits in stadiums and on athletes.

TACTICAL DECISIONS

Move paid weight out of social feeds and into live-game TV windows and audio (radio and sports podcasts). Keep social as a reminder layer only. Treat the phone during the game as a second screen: in-game, fantasy and team apps, not feeds. Build the ability to publish during games, not after.

HOW WE MEASURE IT

Sunday 1pm to 8pm share of weekly impressions, target 40%. Audio and connected-TV reach against the audience defined on page 7, tracked monthly. Unaided link between Overtime and watching at home, tracked quarterly.

Brand Joy Lab, n=2,139, Jun to Oct 2024 and Sept 2026. MRI-Simmons, Spring 2026. GWI, Q3 2025 to Q2 2026.

OPPORTUNITY 3 OF 10

THE LAST ONE

71

The drive home after a big family day scores 71 for parents. Heading home from vacation scores 35, the lowest phase of any experience we measure.

THE MOVE

Own the last beer of the night: the fourth quarter, the seventh-inning stretch, last call, the one in your hand when you are the one driving.

THE FINDING

Heading home from vacation is the lowest-scoring moment the Lab measures (35). The drive home after a big family day scores 71. Same road, opposite feeling, and this fan dislikes the drive home more than most. Drinkers who buy non-alcoholic beer already describe it as the beer you can have and still drive; their own ranking site is named beerfordriving.com.

TACTICAL DECISIONS

Put Overtime at every bar and stadium stand, not one, so the last round never means a search. Time communication to the closing stretch of games rather than kickoff. Choose a partner in the ride-home category over the responsibility campaigns the big brands already run.

HOW WE MEASURE IT

Share of bar and stadium sales in the last hour of game and event windows, target 30% of brand bar and stadium volume. Drive-home mentions in social listening, monthly. Ask it in the Brand Joy Lab: “The last beer of the night before you drive home,” target above 35 and within 10 points of 71.

Brand Joy Lab: heading home, n=3,184, Mar to Oct 2024; family-day drive home, n=183 parents, Aug 2026.

OPPORTUNITY 4 OF 10

NEVER SAY SOBER

8 IN 10

of non-drinkers pick “not applicable” for every joy of beer.

THE MOVE

Write the guardrail into the brand. No sobriety, no Dry January, no zero as the headline, nothing that implies he drinks too much.

THE FINDING

Non-drinkers reject anything that imitates drinking (non-alcoholic beer -23, mocktails -45). This fan drinks two to eight beers a week. And in fan culture, non-alcoholic beer is still the joke: when the NFL fined a player for miming a beer chug, the most-shared reply was “just say it was a non-alcoholic beer.”

TACTICAL DECISIONS

Adopt the guardrail as written policy and add it to creative review. Move January spend to the NFL playoffs instead of the category's Dry January window.

HOW WE MEASURE IT

Contextual sentiment in forum and social mentions: the share that talk about Overtime as a beer rather than as abstaining, tracked monthly. Playoff-week sales ahead of Dry January week.

Brand Joy Lab: non-alcoholic beer, n=63, Feb 2026; mocktails, n=274 to 762, 2024 and Oct 2026; “not applicable,” 66 of 82, Feb 2026. MRI-Simmons, Spring 2026.

OPPORTUNITY 5 OF 10

PRICED LIKE MODELO

61%

put value for the price first when choosing an evening drink, far ahead of a compelling story (29%).

THE MOVE

Price at the premium domestic shelf, not the craft non-alcoholic shelf.

THE FINDING

Value for the price is the top reason people choose an evening drink (61%), far ahead of a good story (29%). This fan's beers are Modelo, Michelob Ultra, Coors Light and Blue Moon: the premium domestic shelf, not craft. The category prices like craft.

TACTICAL DECISIONS

Set the price at Modelo and Michelob Ultra parity, with the 12-pack as the lead format and a launch rebate to seed trial. Seek shelf adjacency with those brands rather than the non-alcoholic set. Make value, not provenance, the lead retail message.

HOW WE MEASURE IT

Price index against Modelo Especial, target 100 to 105. Velocity per point of distribution against Athletic in matched stores.

Brand Joy Lab, Apr 2026, n=401. MRI-Simmons, Spring 2026.

OPPORTUNITY 6 OF 10

THE WEEKNIGHT POUR



THE MOVE

Claim the first drink of the evening, the one before the bourbon.

THE FINDING

A drink at the end of the day brings joy to 89% of weekly drinkers and 16% of non-drinkers. For this fan that drink is usually bourbon, not beer. Drinkers who have tried non-alcoholic beer describe exactly this swap: “I stopped cracking open real beers at home to unwind after work and started reaching for NA ones instead. Same ritual, same satisfaction.”

TACTICAL DECISIONS

Name the weeknight the brand's second occasion with its own share of plan. Weight weekday spend to Tuesday through Thursday evenings. Choose audio and sports-talk partners, where the weeknight game lives.

HOW WE MEASURE IT

Share of consumption occasions logged on weeknights (panel diary), target 40%. Podcast promo-code redemptions week over week.

Brand Joy Lab, Apr 2025, n=146 weekly-or-more drinkers, n=120 non-drinkers. MRI-Simmons, Spring 2026.

OPPORTUNITY 7 OF 10

TREAT, NOT WELLNESS

38%

Only 38% of people rate non-alcoholic beer healthy. The leader sells calories and workouts.

THE MOVE

While the category preaches moderation, we own indulgence.

THE FINDING

Non-alcoholic beer joy rises with light beer (+23) and candy bars (+19) and runs against fresh vegetables (-24). This fan ignores health trends but thinks of himself as fitter than his friends, and Michelob Ultra is already in his fridge.

TACTICAL DECISIONS

Remove calorie, fitness and nutrition claims from the pack and the plan. Set a context rule for all imagery and partnerships: food and games, never workouts. Brief partners on indulgence, not wellness, as the brand's home ground.

HOW WE MEASURE IT

Share of brand content with a food or game context, target 80%. Treat and reward associations in a quarterly tracker, target ahead of healthy within two waves.

Brand Joy Lab, Feb 2026, n=331 to 354 (pairs), n=368 (healthy). MRI-Simmons, Spring 2026.

OPPORTUNITY 8 OF 10

OUR NEW YEAR IS KICKOFF

+40

The start of football season is this fan's single biggest joy: +40 above everyone else, the largest gap of anything we measured for him.

THE MOVE

Treat kickoff as Overtime's New Year.

THE FINDING

Search interest for non-alcoholic beer peaks at New Year and July 4 and bottoms in October and November. The start of football season is this fan's single biggest joy: +40 above everyone else, the largest gap of anything we measured for him.

TACTICAL DECISIONS

Rebalance the annual plan so the heaviest spend lands August through November. This fall, a counter-programmed burst, inclusive of paid search and a light social layer, in October and November while competitors run seasonal flavors. For 2027, a kickoff-timed pack in the product calendar and a September plan locked by July.

HOW WE MEASURE IT

Share of annual volume sold September through November, target 35%. Branded search in those months, target double the category's trough.

Brand Joy Lab, Aug 2024, n=90 vs 309. Google Trends, US, to Oct 8, 2026.

OPPORTUNITY 9 OF 10

BRING THE COOLER



THE MOVE

Be the thing you bring, and the thing the host stocks.

THE FINDING

At the tailgate, contributing to the party brings joy to 58% and getting together with friends to 74%. This fan thrives at big parties and has the income to host. Athletic has put its name on the cooler at the college game, so the home cooler is the open one.

TACTICAL DECISIONS

Add a 24-can bring-along format and a host-sized pack to the product plan. Seek party-aisle and front-of-store placement timed to home openers, Thanksgiving weekend and the playoffs. Brief retail on the giver, not the drinker, as the buyer for these formats.

HOW WE MEASURE IT

24-pack share of brand volume, target 25% by the playoffs. Party-aisle placement count and velocity against beer-aisle facings.

Brand Joy Lab, Jun to Jul 2025, n=339. MRI-Simmons, Spring 2026.

OPPORTUNITY 10 OF 10

THE PLATE IS THE ENTRY POINT



THE MOVE

Enter through food, where the joy already lives.

THE FINDING

Tailgating joy rises with the food around you (+16) and bringing your favorite dish (+15). Beer joy rises with eating a steak (+12). When fans who drink non-alcoholic beer post about game day, it is steaks on the grill and a domestic can.

TACTICAL DECISIONS

Pursue a co-promotion partner in grill food (a regional meat or wing brand) rather than another beverage. Seek cross-merchandising at the meat case and the grill set during grill season and the playoffs. Treat the meal, not the drink, as the entry point in retail and partnership planning.

HOW WE MEASURE IT

Incremental units from meat-case placement against control stores. Basket overlap between Overtime and the partner brand.

Brand Joy Lab: tailgating pairs, n=339, Jun to Jul 2025; beer and steak, n=1,364, 2024.

WHAT HAPPENS NEXT

DAYS 1–30

NO NEW PRODUCTION

The audience definition

The messaging guardrail

The food-and-games rule

The weeknight occasion

The live-game media timing

WEEKS 4–8

SPEND AND DISTRIBUTION

The fall spend rebalance

The bar and stadium priority

DECISIONS

FOR THE BUSINESS, NOT THE AGENCY

Pricing

The new pack formats

WHAT THE JOY MAP ADDS

The 10/10/10 finds the ground to own from what the Lab already knows. The Joy Map builds the map for your brand alone.

Your own questions on the panel.

One custom battery fielded to the Brand Joy Lab, so the thin cells in this report (63 non-drinkers, 90 on the kickoff score, 183 parents on the drive home) become your numbers at full sample.

The full map.

All sixteen territories scored for your customer and shaded by where competitors already message, so you see what is open, what is contested, and what to leave alone.

The matrix.

Every opportunity ranked by effort and payoff, so the plan sequences itself.

HOW TO READ THE NUMBERS

−60 TO 100

Joy Index runs from -60 to 100; nothing we have measured with a solid sample scores above 79.

+ / −

A plus or minus number is how far above or below their own average a group rates something, which is the only fair way to compare people who rate everything differently.

15,300

Every figure here comes from the Brand Joy Lab, PETERMAYER's own study of what brings Americans joy, with 15,300 respondents across 37 months, August 2023 to September 2026, and from a review of the market on October 8, 2026.

Brand Joy Lab, n=15,300, Aug 2023 to Sept 2026. Market review Oct 8, 2026.

SOURCES (1 OF 3)

Every marketplace claim in this report and where it comes from.

CLAIM	SOURCE
Heineken 0.0 integrated across Champions League, Europa League and rugby sponsorship; the at-home viewing occasion named by the brand	Sport for Business, Apr 2021
Heineken ends Champions League partnership Aug 2027	Heineken statement via Yahoo Finance, Oct 30 2025
Heineken 0.0 first non-alc Super Bowl ad (2023); NIQ: 93% of non-alc buyers also buy alcohol	inside.beer, Feb 8 2025
Guinness 0.0 official non-alcoholic beer of the Premier League, four years from 2024/25	Marketing Week, Aug 16 2024
Guinness Premier League deal valued at £52m	The Telegraph, Jun 12 2024
Athletic 60+ sports sponsorships; Heineken 0.0 official N/A beer of F1; A-B official beer of the four largest US leagues	N/ATION, Mar 8 2024
Athletic college basketball campaign, 2025	Trend Hunter, Mar 2025
Athletic owned-media occasions, calories, price cut	athleticbrewing.com, read Oct 8 2026
Athletic and BERO active US Meta ads on the category keyword	Meta Ad Library, pulled Oct 8 2026

SOURCES (2 OF 3)

CLAIM	SOURCE
Corona Cero official beer of the Olympics, extended by the IOC	Inside the Games, Feb 2025
Corona Cero and the Canadian Olympic Committee	Yahoo Finance, Jan 28 2026
Athletic reported as top-selling US non-alc brand (AP, syndicated); earlier sources place Heineken 0.0 first	AP via Facebook, Sept 2026 Sports Business Journal, Aug 2024
r/NABEER community ranking from 46,141 comments	r/NABEER, Sept 2026
US search interest for non-alcoholic beer, five years	Google Trends, pulled Oct 8 2026
AB InBev: ~60% of non-alc growth from new occasions and consumers	Boardroom via LinkedIn, Jun 2026
Audience size: 9.8 million adults 21 to 54	MRI-Simmons USA, 2026 Spring Doublebase, crosstab run Oct 13, 2026

SOURCES (3 OF 3)

CLAIM	SOURCE
Phone in hand while watching TV, 92%	GWI Core, Affluent NFL Beer Drinkers panel, Q3 2025 to Q2 2026
Athletic Brewing an official non-alcoholic beer of the NHL	Athletic Brewing on X, Oct 8, 2026
Athletic cooler and ticket prize pack with Cincinnati Bearcats	Cincinnati Bearcats on X, Sept 29, 2026
“Just say it was a non-alcoholic beer” reply to the Juszczyk fine	Sowell Brother on X quoting Adam Schefter, Sept 25, 2026
“Same ritual, same satisfaction”	r/NABEER, Dec 23, 2025
“Have a beer and drive home safely”; community ranking hosted at beerfordriving.com	r/NABEER, Dec 13, 2025 and Sept 23, 2026
“$3.99, great game day beer”	r/NABEER, Oct 4, 2026
NA beer at several stands at Comerica Park	r/NABEER, June 8, 2026

SEIZE YOUR EMOTIONAL ADVANTAGE

Book a call with the Brand Joy Lab