

ALCOHOL & 0%

Where a drinks repertoire
is first built, in company,
with room for both ends of
the category

An Eighteen24 White Paper · Oct 2026



EXECUTIVE SUMMARY

**A preview of how UK students drink,
where their choices get made, and how
drinks brands earn a place in a
repertoire that is still forming.**

University packs in more social occasions than any other stage of adult life, with a drink, alcoholic or not, at the centre, and catches students at their most open to new people and brands. The full paper follows them across the category and campus, and shows why the brands they meet here hold an advantage for years afterwards.

FOR THE FULL PAPER

Email

sales@eighteen24.com

INSIDE THIS SUMMARY

- Section guide
- Six headline insights
- How to access the full paper

A complete guide to alcohol, 0% and the UK student drinks occasion.

The full paper runs to 23 pages of category data, behavioural evidence, brand examples and media planning implications, drawn from over 70 sources including IWSR, UCL, Drinkaware, CGA by NIQ and SOS-UK.

- | | | | |
|----|---|----|---|
| 01 | The Category, Defined | 02 | The Sober Generation Myth, Examined |
| 03 | How They Drink | 04 | What Changes at University |
| 05 | Where the Occasions Are | 06 | Student Spend and the Loan Calendar |
| 07 | The Shape of the Night | 08 | The Student Drinks Year |
| 09 | What They Reach For: Cocktails and RTDs | 10 | Beer and Cider, Refreshed |
| 11 | The 0% Story | 12 | Beyond the Category: Functional Drinks |
| 13 | How a Drink Gets Found | 14 | Brands Winning with UK Gen Z |
| 15 | Why the Timing Matters | 16 | How Drinks Build Fame: The Case for OOH |
| 17 | Advertising Alcohol on Campus | 18 | Heart of Campus: The Students' Union |
| 19 | Full-Motion, Full Portfolio | 20 | Meet Eighteen24 & the Formula |

This summary covers six headline insights. The full paper goes deeper, with the four stages of a typical student night, a term-by-term drinks calendar, lessons from brands winning in wine, beer, spirits and alcohol-free, and the Eighteen24 formula for reaching students across the year in the spaces where their social life is organised.

How this audience really drinks.

INSIGHT 01 • THE MYTH, EXAMINED

The data has overtaken the sober generation story.

The idea that Gen Z had walked away from alcohol took hold in 2023, built on a cohort that came of age into closed pubs and cancelled Freshers weeks. Three years on, Gen Z participation sits close to the adult average, with Boomers now drinking least. Gen Z drinkers are also the most likely to have drunk cocktails recently, been out in a group of five or more, and followed health guidance.

76%

of UK Gen Z of legal drinking age drank alcohol in the past six months, up from 66% three years ago

Source: IWSR Bevtrac, H1 2026

INSIGHT 02 • HOW THEY DRINK

Moderation is now part of a good night out.

Big nights out remain central to student life, with 41% of UK students regularly pre-drinking before heading out. Moderation happens inside those nights. Zebra striping has gone mainstream, with 45% of UK adults doing it on a night out, and 43% of 18 to 24s now drink low and no semi-regularly, more than any other age group. A recognisable 0% keeps someone in the round without a conversation: 59% of UK 18 to 24s have ordered alcohol-free without telling their friends. Moments that once meant a soft drink or tap water now end in a branded, premium serve.

91%

of UK drinkers use at least one moderation technique, up from 87% and the highest level Drinkaware has measured

Source: Drinkaware Monitor 2026

INSIGHT 03 • WHERE THE OCCASIONS ARE

Young adults go out more than anyone, and university packs the calendar.

Most UK drinkers are around twice as likely to drink socially at home in a typical week as on a night out. Young adults sit at the other end of the scale, and university fills their weeks with societies, sport and fixtures, much of it organised through the Students' Union. Socialising is the largest single activity in student spending, at £105.70 a month, and a student's drinks repertoire is still being assembled, in public, alongside friends doing the same.

28%

Gen Z share of all GB on-premise visits, against 20% of the population

Source: CGA by NIQ via The Morning Advertiser, October 2025

How brands earn the order.

INSIGHT 04 • WHAT THEY REACH FOR

Flavour, format and 0% are reshaping what young adults order.

Britain's favourite cocktail, the Gin and Tonic, misses the top ten for UK 18 to 29s, whose number one is the Spritz. That taste for cocktails is also lifting ready-to-drinks. Beer and cider are changing in their own way, through fruit, stout and draught, and low and no is the fastest-growing segment of UK on-trade beer. In a flat market, growth is going to the brands that have found a new way in.

+17%

Rise in RTD sales value in UK shops and supermarkets, with volumes up 12% as spirits lost ground

Source: WSTA Sip 2 Report, via The Drinks Business, May 2026

INSIGHT 05 • WHY THE TIMING MATTERS

Once a drinks repertoire settles, it is expensive to get into.

Ehrenberg-Bass research shows spirits to be a high-loyalty category: brands hold a far larger share of their buyers' spend than is typical in grocery, which makes life hard for those not yet on the shortlist. Growth comes from reaching people who don't yet buy a brand, and that describes a large proportion of first-year students. University brings independence, new friends and a packed social life all at once. A brand chosen in those years has a head start that rivals find costly to close later.

41-45%

Average share of category spend a spirits brand holds among its own buyers, compared with 25-29% across comparable grocery categories

Source: Dawes, Ehrenberg-Bass Institute, 2023

INSIGHT 06 • CLOSE TO THE DECISION

A brand seen in the Students' Union is a few steps from the round.

Students use their union day and night, to eat, study, shop, work out and socialise, and many nights out start here. Eighteen24's screens are part of that daily life. Union visits average 40+ minutes, and the audience is overwhelmingly 18 and over. Seen together as plans are made, a brand builds familiarity in a space students trust. Campaigns can target proximity, sales, weather, time and day, so every pound works harder.

66%

of UK on-premise visitors decide what to drink once they are inside the venue

Source: CGA, Path to Purchase Report

GET THE FULL PAPER

Ready for the full picture?

We share the full white paper directly with brands, agencies and media planners. It's a short conversation, and we'll send the complete report straight back to you.

Email us for the full paper.

Tell us a bit about your brand, portfolio or planning brief and we'll send the complete Alcohol and 0% white paper, along with answers to any questions about reaching UK students on campus.

sales@eighteen24.com

Already chatting with someone at Eighteen24?
Reply to their last email and ask for the Alcohol and 0% paper.

Curated research

Over 70 sources including IWSR, UCL, Drinkaware, NIQ, CGA by NIQ, KAM, the Portman Group, Heineken UK and SOS-UK.

Built for planners

Lessons from the brands winning with UK Gen Z, behavioural frameworks and media planning implications, structured for use in briefs, decks and recommendations.

Calendar-aligned

Maps the student drinks year term by term, from Freshers to summer balls, and the four stages of a typical night out.

The UK's largest student DOOH network

Over 400 premium full-motion D6 screens placed inside Students' Unions across 130+ campuses and 90+ universities, including 21 of the top 25. Positioned in cafés, study areas, social spaces and walkways where dwell time is highest.

400+

SCREENS

90+

UNIVERSITIES

2M

STUDENTS
REACHED

116M

IMPRESSIONS
PER FORTNIGHT

Our formula for effective Gen Z engagement

Be where they
are

Be where they
care

Be where they
share

Be where they
see you

**Be the brand they keep
in the round.**

At university, drinks habits form among friends, across more occasions than any later stage of life. The brands that earn attention while they settle, at both ends of the portfolio, are the ones still being asked for at the bar long after graduation.

sales@eighteen24.com