

The availability and promotion of low-alcohol beverages in licensed venues: an environmental audit on the Gold Coast, Australia

Blake Palmer^{a,b,c}, Christopher Irwin^{a,b}, Christina Mailer^a and Ben Desbrow^{a,b}

^a School of Health Sciences and Social Work, Griffith University, Gold Coast, Queensland, Australia

^b Menzies Health Institute Queensland, Griffith University, Gold Coast, Australia

^c Corresponding author: blake.palmer@griffith.edu.au

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Key points

- This study assessed the availability, visibility, advertising, and promotion of low-alcohol beverage (LAB) products at licensed venues on the Gold Coast, Queensland, Australia
- LABs were offered in 56% of venues audited
- Visibility of LABs at bar service areas and on beverage menus was limited
- No LAB-related advertising or promotion was identified at any venue
- There is significant capacity to improve access to lower alcohol alternatives available within licensed venues

Abstract

Objectives: Low-alcohol beverages (LABs) are becoming increasingly popular and more accepted in Australia. However, the extent to which these products are accessible in licensed venues remains unknown. This investigation aimed to explore the availability, visibility, advertising, and promotion of LAB products at licensed venues.

Study type: A cross-sectional environmental audit of licensed venues in four entertainment locations on the Gold Coast, Queensland.

Methods: An audit tool was developed. Licensed venues selected for auditing included bars, pubs, clubs, and nightclubs. Consent for conducting the audits was obtained from selected venues. Audits involved a walk-through of each venue's public areas and a review of their beverage menu to observe availability, visibility, advertising, and promotion of LAB products.

Results: A total of 58 venues were identified, with 32 (55%) providing written consent to audit. Overall, 18 venues (56%) offered patrons the opportunity to purchase LAB products. At bar service areas, LAB products were 'not visible' in 20 (63%) venues, and 'somewhat visible' in 12 (38%) venues. No bar service areas displayed LAB products with 'high visibility'. Of 29 beverage menus audited, 10 (34%) displayed LAB products, with varying levels of visibility. LAB-related advertising and/or promotion was not identified in any of the venues.

Conclusions: LABs were available in approximately half the licensed venues audited; however, the visibility and promotion of these products were poor. There is capacity to improve access to and promote lower alcohol alternatives within licensed venues.

Introduction

Many Australian adults regularly exceed the 'single occasion' drinking guidelines. Approximately 26% of people aged ≥ 18 years consumed >10 drinks in the last week and/or >4 drinks on any one day at least monthly in 2020–21.¹ The harmful use of alcohol is a complex public health issue with many environmental, social, and cultural factors underpinning drinking behaviours.^{2,3} However, recent market research has indicated that many Australian drinkers are consuming lower-strength alcohol products alongside full-strength products.⁴ Indeed, sales of non-alcoholic products have reportedly increased 150% in liquor stores since 2020, and 130% in pubs since 2021.⁵ Licensed venues often employ measures to increase sales of alcohol, but they also can act as a platform to moderate consumption.^{6–8} Contemporary licensed venues have recognised the importance of providing experiences for patrons associated with lifestyle and social enjoyment in addition to the potential to consume alcohol. Increases in the availability, marketing, and social acceptance of low-alcohol beverages (LABs), which are defined as having $\leq 1.15\%$ alcohol by volume⁹, may present an opportunity to moderate drinking behaviours.^{10–13} However, the extent to which these products are available, visible, and promoted to patrons in Australian licensed venues remains unknown.

Therefore, this investigation aimed to explore the availability, visibility, advertising, and promotion of LAB products in licensed venues in one popular Australian entertainment district.

Methods

Study design and sampling

A cross-sectional environmental audit of licensed venues in entertainment locations on the Gold Coast, Queensland, Australia, was undertaken. Licensed venues included bars, pubs, clubs, and nightclubs across four key audit tracts. This study was approved by the Griffith University Human Research Ethics Committee (GU Ref No: 2022/119) in March 2022. Staff at participating venues provided written informed consent prior to data collection occurring.

Audit tract formation

The Gold Coast is a popular tourist destination 66 km south of Brisbane, featuring a wide range of nightlife and entertainment venues. Audit tracts were initially developed using Google Maps™ to identify licensed venues in several Gold Coast suburbs. Street segments across four Gold Coast suburbs were selected based on their broad popularity as drinking locations and the variety of licensed venues catering for different patrons and drinking occasions. When conducting the audits, the researcher identified and included additional venues not

identified on Google Maps™. The final audit tract for each entertainment location is shown in the supplementary material (See Supplementary Figures S1–S4, available from: doi.org/10.6084/m9.figshare.22124216).

Audit instrument

The research team developed a draft audit tool and pilot tested at one venue by two researchers (BP and CM) to ensure content validity and feasibility. No major changes to the tool construction occurred following the pilot testing. The final audit tool considered visual stimuli from four domains: 1) availability; 2) advertising; 3) promotion; and 4) beverage menu (physical menu or digital menu used to determine availability of products that may not be visible from bar service areas – e.g. non-alcoholic cocktails, referred to as mocktails). Study data were collected on a mobile device and managed using the REDCap® electronic data capture tool (version 12.0.29). Details of the audit tool are outlined in Table 1.

Data collection process

One researcher (BP) conducted all visits over a 5-week period between June and July 2022. This individual is an accredited practising dietitian, 2 years into a research program exploring consumer attitudes, perceptions, and behaviours toward LABs. As such, they were familiar with the existing range of LAB products. Consent to conduct the audit was obtained from the venue manager or a senior staff member at each venue. Venue staff were not informed that the specific nature of the investigation was on LAB products. Instead, they were told that it was an audit of all beverages available to prevent potential bias. Audits took between 10–30 minutes and involved a walk-through of each venue's public areas. The timing of the audits was prioritised around the time the venue opened or during quiet periods. This was done to ensure sufficient space was available to observe the environment and that LAB product availability (should they exist) was maximised. The audit was designed to involve minimal contact with staff and patrons (i.e., no individuals were approached to assist in providing information for the audit). Beverage menus were audited last to prevent bias when assessing LAB product visibility at bar service areas.

Visibility of LABs in bar service areas, LAB advertising/promotion, and LABs on beverage menus were classified as either: 1) not visible, 2) somewhat visible, or 3) highly visible. The 'not visible' classification meant that LABs (both at the bar service area and on menus) and advertising/promotion were not identified. The 'somewhat visible' classification was used in cases when LABs and/or advertising/promotion were present, but not easily seen by the researcher. For example, located below eye-level on the bottom shelf of the bar fridge; small or infrequent posters detailing LABs in venues; or LABs listed on the menu, among other full-strength options. The classification 'highly visible' meant that LABs and/or

Table 1. Outline of the audit tool design and measurement of observations regarding low-alcohol beverage products

| Domain | Area of observation | Materials observed | Measurement |
|--|--|--|-----------------------------------|
| Availability | In venue: bar service areas | Number of bar areas | Open number field |
| | | Tap provisions | Dichotomous (Yes/No) |
| | | Bottles/cans | 3-point Likert scale ^a |
| | | Other/notes (type, brand, location/visibility behind the bar) | Open text field |
| Advertising and promotions | In venue: external to bar service areas | Bottles/cans | 3-point Likert scale ^a |
| | | Posters/signs/TVs | |
| | | Hung menu displays | |
| | | Bar mats/coastersW | |
| | In venue – Bar service areas | Other/notes (details of advertising and/or promotions visible) | Open text field |
| | | Posters/Signs/TVs | 3-point Likert scale ^a |
| | | Hung menu displays | |
| | | Bar mats/coasters | |
| | Other/notes (details of advertising and/or promotions visible) | Open text field | |
| | Outside venue – View from street | Banners/posters | 3-point Likert scale ^a |
| | | TVs/media | |
| | | Pamphlets/handouts | |
| Other/notes (details of advertising and/or promotions visible) | | Open text field | |
| Beverage menu | Physical menu or digital menu if physical unavailable | Menu available | Dichotomous (Yes/No) |
| | | Beverage provisions | 3-point Likert scale ^a |
| | | Beverage price | Open text field |
| | | Other/Notes (type, brand) | |

^a3-point scale included: 'not visible'; 'somewhat visible'; 'highly visible'; where 'not visible' = material of interest not seen by researcher; 'somewhat visible' = material of interest present, but not easily seen by researcher; and 'highly visible' = material of interest easily seen by researcher.

promotion/advertising were easily seen by the researcher. For example, located in a dedicated no/low alcohol section of the bar fridge at eye level; prominent posters detailing LABs in venues; or LABs listed on the menu under a dedicated no- and/or a low-alcohol section.

Analysis

A descriptive analysis of quantitative variables was performed (i.e., open number, dichotomous, and Likert responses). Venues were classified into 'bar and restaurants'; 'bars'; 'pubs'; 'nightclubs'; and 'other' (e.g., karaoke, pool, and shisha bar). 'Bar and restaurants' included venues that sold alcohol and discrete meals (e.g., dinner); 'bars' included venues exclusively selling alcohol without food; 'pubs' included venues that sold alcohol, and an extended stay was expected (where food may be consumed); and 'nightclubs' included

venues with dancing and entertainment. Open text field descriptions were subsequently processed into quantitative descriptors (i.e., above, at, or below eye-level; top, middle, or bottom shelf).

Results

Venue recruitment and characteristics

In total, 58 venues were identified within the four audit tracts. Staff from 32 venues provided written consent to participate. Bar and restaurants were the most common venues audited (53%) (see Table 2). Venues ranged in size, offering between one and four bar service areas per venue. Additional recruitment information for each suburb audited is included in the supplementary material (See Table S1, available from doi.org/10.6084/m9.figshare.22124216).

Table 2. Overview of venue recruitment

| Venue type | Number approached | Number consented | Acceptance rate (%) |
|---------------------|-------------------|------------------|---------------------|
| Bar and restaurants | 23 | 17 | 74 |
| Bars | 8 | 5 | 63 |
| Pubs | 10 | 5 | 50 |
| Nightclubs | 13 | 2 | 15 |
| Other | 5 | 3 | 60 |
| Total venues | 58 | 32 | 55 |

Availability of low-alcohol beverages (LABs)

LABs were available to purchase in 18 (56%) of the audited venues, including products visible at bar service areas and on beverage menus. LABs were identified in 13 bar and restaurants (72% of total venues selling LABs), two pubs (11%), one bar (6%), and one nightclub (6%), and one other venue, with a total of 42 products available across all sites. Low-alcohol beers were available in 15 (47%) of total venues selling LABs, mocktails in seven (22%) venues, low-alcohol spirits in three (9%) venues, and low-alcohol wine in one (3%) venue. Additional information detailing product brands identified is included in the supplementary material (See Table S2, available from doi.org/10.6084/m9.figshare.22124216).

Bar service areas

LABs were considered 'not visible' in the bar service areas for the majority ($n = 20$, 63%) of all venues. Only 12 (38%) venues had LABs that were considered 'somewhat visible', while no venue had LABs prominently displayed (i.e., 'high visibility'). Across all venues, 17 LAB products were identified in bar service areas; these included 14 beers (82%), two spirits (12%), and one wine (6%). None of the LABs available were supplied at the bar via a tap dispensing system.

Beverage menu

A total of 29 venues (91%) provided a beverage menu. Of these, 10 (34%) menus had LAB options available. Table 3 describes the visibility of LAB products on beverage menus. For menus indicating LAB provisions, 29 LAB options were identified (including non-specific products such as 'create your own mocktail'). There were 18 mocktail (62% of LABs across menus), 10 low-alcohol beer (34% of LABs across menus), and one low-alcohol spirit option(s) (3% of LABs across menus) identified on beverage menus.

Table 3. Low alcohol beverage (LAB) visibility on beverage menus ($N = 29$)

| Beverage type | Visibility ^a | Number beverage menus ^b | Percentage (%) ^c |
|---------------|-------------------------|------------------------------------|-----------------------------|
| Beer | Highly visible | 3 | 10 |
| | Somewhat visible | 5 | 17 |
| Mocktail | Highly visible | 4 | 14 |
| | Somewhat visible | 3 | 10 |
| Spirit | Somewhat visible | 1 | 3 |

^a 'Somewhat visible' = low-alcohol beverages listed on beverage menus among other full-strength options; 'highly visible' = low-alcohol beverages listed on beverage menus under a dedicated no-and/or a low-alcohol section.

^b 10 venues had low-alcohol beverages identified on their beverage menu, with several menus offering multiple beverage types.

^c % from total number of venues that provided a beverage menu ($N = 29$).

Advertising and promotion of low-alcohol beverages (LABs)

No LAB-related advertising or promotion was identified on entry to, or within any of the audited venues.

Discussion

This environmental audit examined the availability, visibility, advertising, and promotion of LABs in licensed venues located in select suburbs of the Gold Coast. LABs were available in approximately half the licensed venues audited; however, the visibility and promotion of these products were generally poor. No venues displayed LABs with high visibility at bar service areas nor displayed any form of advertising/promotion to encourage uptake of these products. Thus, there is capacity to improve access to (and promote) lower alcohol alternatives in licensed venues.

Individuals intending to consume lower-alcohol alternatives have some opportunity to do so in the venues audited in the current study. However, the range of products available in these venues does not reflect the diversity of product options offered outside licensed venues (i.e., in grocery and liquor stores).¹⁴⁻¹⁶ Currently, more than 90 zero-alcohol wine products and more than 60 zero-alcohol beer products are available to Australian consumers via one national liquor retailer alone.^{17,18} While licensed venues may not have the capacity to offer such a large variety of LAB products, some availability increases could be expected due to market

diversification. However, the current findings indicate that the variety of low-alcohol beer products available was limited in the venues audited. Indeed, only one venue offered a craft/independent low-alcohol beer product, despite these products representing a large portion of the LAB segment in Australia. Additionally, very few varieties of low-alcohol wine were available in venues, with only one venue offering a single option.

While the venues audited do not provide a diverse range of products, Australia's largest alcohol retail network has reported a 130% increase in demand for zero-alcohol products in pubs, with beer the most popular choice.⁵ Our findings suggest that licensed venues (at least those audited) have been slow to respond in providing access to the increased market diversification and demand for lower strength alcohol products. Therefore, those individuals intending to consume LABs will likely experience limited variety available in venues within the audited geographical location.

No LAB advertising and/or promotion was identified, and the limited product visibility demonstrates that licensed venues currently do little to encourage consumers to choose lower-alcohol products at the point-of-sale. It is possible that operators of licensed venues do not see LAB products as appropriate for consumption in their environments (i.e. where patrons typically consume alcohol). However, LAB product availability is increasing in other environments where customers purchase alcohol products, such as liquor and grocery stores.¹⁴⁻¹⁶ As the consumption of LABs becomes more normalised, and patrons look to purchase these products, it is possible that adequate visibility and promotion of these products in licensed venues may become increasingly important. Concerns have been raised about alcohol companies' brand extension via increased promotion of their non-alcohol products, for example, children's exposure to non-alcoholic beverage marketing through public mediums like bus stop and television advertising.¹⁹ However, in the context of environments where alcohol is already served, increased promotion of low-alcohol alternatives may prove beneficial to encourage safer point-of-sale decision-making. The extent to which increased LAB visibility and promotion can alter drinking behaviours, for example, by moderating the consumption of full-strength alcoholic products as a harm-minimisation strategy, is yet to be elucidated.

The diversity of products available is one factor that may shift patronage between licensed venues. Licensed venues have used this strategy to attract customers for some time (e.g., bars or liquor stores advertising the number of products available). Furthermore, with the increase in popularity of low-alcohol alternatives, some venues have been established solely with the intent to sell no- and low-alcohol versions of regular alcoholic products. For example, a bar specialising in non-alcoholic beverages opened in Melbourne, Victoria in 2021²⁰, and a retail store specialising in non-alcoholic beverages opened in Perth, Western Australia in 2022.²¹

Currently there is an opportunity for licensed venues to diversify their LAB product range and therefore potentially differentiate themselves from other licensed venues. Increasing the variety of LAB products available may offer a unique opportunity for licensed venues to create popular social environments while potentially reducing large consumption of alcohol.

Limitations

This study was conducted within a small geographical region of the Gold Coast, where approximately half the venues approached agreed to be audited. As such, our findings may not be generalisable to all venues within the locations audited or, more broadly, across Australia. There was a higher representation of non-consent from venues that were owned/managed by larger corporations, which often required an escalation of authorisation to give consent. A verbal consent mechanism may have facilitated a greater number of venues consenting to the audit. It is possible that venues managed/owned by larger corporations may provide a greater variety or promotion of LAB products than observed in the venues that were audited. Furthermore, having one researcher conduct all audits may have introduced systematic errors in the results. It is possible that the researcher missed some LAB products visible in bar service areas during the audit. However, this individual was familiar with a wide range of LAB products. Thus, if LAB products displayed at bar service areas were missed, their visibility was likely poor, and the prospect of patrons being able to identify them was low. Lastly, there may be financial factors influencing licensed venues' decision to sell LAB products (e.g., less desirable profit margins), however, it was not within the scope of this study to investigate financial factors affecting the sale of these products.

Overcoming challenges

Lastly, no low-alcohol beer products were identified as being sold by large volume distribution systems (i.e., taps). One explanation for the lack of large volume distribution may be that no- and low-alcohol beer support greater microbial growth and higher spoilage rates than products with higher ethanol concentrations.²² Overcoming the challenges associated with large volume distribution of no- and low-alcohol beer products may be an important step to increase the availability and visibility of no and low-alcohol beer products at bar service areas.

Behaviour change models highlight the importance of facilitating opportunities to make safe choices.²³ Additionally, exposure to advertising and promotion can alter consumer perceptions of products.²⁴ Licensed venues have an opportunity to contemporise their setting by promoting LABs and increasing the normalisation of these products within their environments. This may present an opportunity for patrons to potentially moderate their alcohol consumption in environments where large amounts of alcohol are typically sold. Currently, our

understanding of consumers' attitudes, behaviours, and beliefs about LAB consumption is limited within these environments and warrants further investigation.

Conclusion

This study explored the availability, visibility, advertising, and promotion of LAB products at licensed venues. LABs were available in approximately half the licensed venues audited, but the variety, visibility and promotion of these products were poor. Individuals seeking LAB products have some opportunity to purchase them, but this choice is rarely highlighted to patrons due to a lack of visibility, advertising, and promotion in these venues. As such, licensed venues are currently missing a potential opportunity to expose patrons to LAB products and their potential harm-minimising effects.

Peer review and provenance

Externally peer reviewed, not commissioned.

Competing interests

BD has held a consultancy within the alcohol industry (Tribe Brewing Pty Ltd), providing advice and support for developing a non-alcoholic beer. No ongoing financial conflicts of interest exist.

Author contributions

All authors were responsible for designing, reviewing and editing the manuscript. BP was responsible for data collection, analysis, and manuscript drafting. CI was responsible for overseeing the data analysis, and BD was responsible for providing analytical advice.

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