

# POSITIONING HEINEKEN 0.0 FOR SOCIAL INCLUSION

CLIENT: HEINEKEN 0.0

WORD COUNT: 3000



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# EXECUTIVE SUMMARY

This report identifies how Heineken can accelerate the growth of Heineken 0.0 while protecting the authenticity and equity of its parent brand. It explores which messages create new drinking occasions without diluting brand identity and how to balance unified versus distinct positioning to ensure long-term brand health.

Guided by the Backward Market Research framework, the project progressed from managerial decision to data. A mixed-method design combined (i) secondary and industry sources, (ii) social listening (YouScan) to capture unprompted consumer conversations, (iii) two in-depth focus groups (n = 6; blind tasting of Heineken Original vs 0.0 followed by discussion each time), (iv) a synthetic survey experiment testing message frames and segment responses. This triangulated approach delivered qualitative depth and quantitative direction, ensuring analytical rigour.

## **Key Insights:**

**Sports as a Social Accelerator:** Social-listening data peaked around football and pub rituals, showing 0.0 acts as a social replacer, allowing participation in shared match-day moments and weekday gatherings. Focus-group participants described 0.0 as "crisper" and "better tasting," validating a taste-upgrade narrative that extends Heineken's relevance across new, alcohol-free occasions.

**Social Stigma as the Barrier:** Many consumers, especially men, fear judgement for choosing 0.0, viewing it as "fake beer." This is compounded by pricing perceptions, as 0.0 often costs more, creating a "premium for abstaining." Health-led messages performed weakly, while belonging and confidence frames resonated strongly.

## **Strategic Direction:**

Heineken should retain a unified masterbrand while giving 0.0 a distinct, confident tone that emphasises inclusion and taste innovation. Campaigns should centre on sports occasions and cultural humor, positioning 0.0 as socially empowering rather than abstinent. Pricing should also achieve value parity, removing the "premium penalty" while protecting brand prestige. Success should be tracked via brand warmth, public ordering comfort, and trial intent. Ultimately, Heineken 0.0 should embody belonging without compromise, a taste-led extension that reinforces Heineken's sociable identity.

# INTRODUCTION

The NoLo (no- and low-alcohol) category is expanding rapidly, driven by health awareness, shifting norms, and mindful drinking (Critchlow et al., 2025, Jagger, 2025; Nicholls, 2023). Yet, perceived inauthenticity and unclear “alcohol-free” definitions (0.0-0.5%) create brand-equity risk (Nicholls, 2022). Guided by the Backward Market Research framework (Andreasen, 1985), this report addresses how Heineken can grow 0.0 while protecting equity, overcoming stigma, and price perceptions via targeted communications. An exploratory-descriptive mixed-method design integrating secondary research, social listening, qualitative focus groups, and synthetic quantitative testing, captures both the attitudinal and behavioural dimensions. Together, these methods provide a rigorous foundation for actionable recommendations, supporting Heineken’s positioning of 0.0 as a credible and taste-driven extension within the NoLo market.

# METHODOLOGY

Following the Backward Market Research approach (Andreasen, 1985), each phase generated decision-relevant evidence.

## **Secondary Research**

The first phase established a foundation through academic and industry literature. Nicholls (2022; 2023) highlighted ambiguity of “alcohol-free” labelling (0.0-0.5%), persistence of social stigma, and consumer confusion. Bartram et al., (2024) and Peng et al., (2023) emphasized that brand extension success depends on attribute and value fit, taste, quality, and shared brand meaning, rather than usage fit alone. Keller’s (1993) Customer-Based Brand Equity (CBBE) model guided how perceptions of quality and sociability could transfer from Heineken Original to Heineken 0.0. These insights shaped focus groups protocol and the message frames tested in the synthetic survey.

## **Social Listening (YouScan Analysis)**

The second phase involved using YouScan, which aggregated public online mentions of Heineken and alcohol-free products between September 29th - October 5th (n = 2,598 mentions) (**Appendix A**). The data confirmed two dominant themes: (1) sports as a social accelerator where 0.0 appears most often in discussions about football, pubs, and group rituals, and (2) social stigma, where non-alcoholic choices are described as “fake” or “not real”. Only 0.08% of mentions referenced health, confirming 0.0’s relevance as social and not wellness-driven. These insights directly informed the development of the qualitative and quantitative design phases.

## **Focus Group**

Two focus groups of six UK-based adults (aged 25-34; four male and two female) explored perceptions of taste, brand genuineness, and social judgement. Participants were purposively selected based on residence, interest in sports and beer culture, and willingness to engage, ensuring relevance to Heineken's target demographic and alignment with consumption behavior. Each completed a blind tasting of Heineken original and 0.0, followed by a semi-structured discussion (**Appendix B**). Thematic coding identified five recurring themes from participant comments: taste perception, brand recognition, social stigma, price/value, and functionality. Echoing Gliszczyńska-Świgło et al., (2025), participants described Heineken 0.0 as "crisper" and nearly indistinguishable from the original suggesting sensory equivalence. However, stigma and pricing emerged as the strongest deterrents (Nicholls, 2023). This analysis was made possible through the use of open-ended questions, which encouraged participants to engage in genuine dialogue with the moderator, providing nuanced insights.

A 40-minute AI-simulated focus group mirrored the same participant profiles to test the transferability of observed themes. The dialogue closely replicated real findings, particularly around social stigma, situational usage, and the importance of branding as social cover. While no new themes emerged, this simulation reinforced the reliability and generalisability of the qualitative insights, increasing confidence that the interpretations were not context-bound.

## **Synthetic Validation**

The final phase employed a quantitative design using AI-generated synthetic data to replicate consumer decision-making patterns. This phase was structured across four steps.

The first step was survey design. Questions were constructed to reflect realistic consumer decision-making contexts based on the insights identified in the social listening phase. Participants responded using structured formats such as "most likely/least likely," "yes/no," and forced-choice ("pick one") options, ensuring clarity and comparability across segments. This format balanced attitudinal and behavioural measures, allowing the dataset to capture nuanced preferences while maintaining internal consistency.

The second step involved defining the synthetic sample. Demographic and psychographic parameters of the target audience mirrored Heineken's consumer base ensuring realism, 77% male and 23% female, aged 25-34, based in the UK, with strong interests in sports and beer-related social occasions. Additionally, participants' past purchase behaviours were embedded to simulate realistic variation. Following data generation, four distinct segments emerged: Core Loyalists, Social Flex Drinkers, Price-Conscious Switchers, and Taste Explorers. Each represented a unique behavioural profile, capturing key drivers of Heineken 0.0 consumption.

The third step focused on data generation. Responses were produced in batches of 10-20 simulated participants ensuring variation and preventing overfitting or mechanical uniformity.

The model was instructed to include at least 20% extreme ratings to replicate real-world polarity in consumer opinions. Controlled randomness was introduced, simulating the inconsistencies and noise typical of human survey data, such as minor contradictions or illogical responses, enhancing ecological validity.

The final step was analysing the synthetic data. Each dataset was assessed for plausibility and internal coherence, verifying that distributions resembled natural human response patterns and aligned with market benchmarks. Results were synthesised into actionable insights, highlighting obvious patterns (high-confidence insights) and areas of genuine uncertainty that warrant real-world testing. This multi-layered analytical process ensured rigour and reflected how synthetic methods can complement traditional research when resource or time constraints limit primary data collection.

# SPORTS AS AN ACCELERATOR

Heineken 0.0 serves less as a health-oriented beverage and more as a facilitator of social moments traditionally associated with drinking. While most NoLo brands lean on health narratives (Nicholls, 2023; Bartram et al., 2024), Heineken 0.0's power lies in preserving belonging within familiar cultural scripts, particularly sports. By mirroring the sensory and symbolic experience of beer, Heineken 0.0 enables individuals to engage in drinking rituals without exclusion.

## **Supporting Evidence:**

Social listening (**Appendix A**) revealed that approximately 0.65% of online conversations referenced sports, pubs, or group events, while only 0.08% mentioned health. While the numerical share appears small, the word cloud and interest map demonstrate that the majority of the mentions centre around football and pub culture (**Appendix A**). Mentions spiked during football tournaments and Formula 1 races, confirming alignment with communal sporting experiences. Importantly, tone and humour were defining features: memes and light-hearted content generated engagement rates 149% above average, signalling that Heineken 0.0 has become part of everyday social banter. This dynamic is crucial because humour acts as a social equaliser, reducing the stigma around abstaining from alcohol, allowing 0.0 drinkers to blend in seamlessly (Cialdini, 2001).

Focus group findings (**Appendix B**) reinforced this social integration. Participants described Heineken 0.0 as “lighter” and “even better than the original,” suggesting that taste realism eliminates social tension. Several noted that 0.0 enabled them to “blend in” at pubs or game nights, especially when driving or working early the next day. One participant admitted, “It's easier to cheers a Heineken bottle than a Coke can.” This reflects symbolic consumption, where the product's appearance and ritual use matter as much as its functional content.

In contrast, wellness benefits rarely emerged spontaneously, showing that consumers interpret 0.0 primarily as a vehicle for social belonging.

The synthetic focus group deepened this understanding, highlighting how Heineken 0.0 provides “social camouflage.” Several participants admitted they’d “get stick for holding a 0.0” during football nights, yet valued that the identical green bottle “doesn’t stand out.” This nuance reveals that acceptance of 0.0 is conditional, consumers rely on visual assimilation to preserve identity within masculine peer settings. Furthermore, Heineken’s design “gives you social cover” illustrating that brand cues perform a symbolic equalising function, aligning with Underwood & Klein’s (2002) argument that packaging communicates identity continuity. Similarly, the phrase “it’s more accepted now, but not on lads’ night” exposes the contextual fragility of normalisation: 0.0 succeeds in weekday or mixed-gender environments, but remains semi-taboo in core male rituals. These insights reframe Heineken 0.0’s sociability advantage as an adaptive social artefact, a brand that subtly bridges shifting drinking norms without fully replacing alcohol’s symbolic status.

Quantitatively, the synthetic survey data (**Appendix C**) confirmed these behavioural motivations. Among the Social Flex Drinkers segment, 88% cited “participating socially when others are drinking and watching sports games” as their primary reason for choosing 0.0. Likewise, Taste Explorers (95% citing flavour) further demonstrated the emotional and sensory appeal of Heineken 0.0, rather than its abstinent identity, driving preference.

### **Theoretical Interpretation:**

These patterns align with the Social Identity Theory (Tajfel, 1986) which posits that individuals derive part of their self-concept from group affiliation. In many social settings, alcoholic drinks serve as social badges signalling deviation. Heineken 0.0 solves this dissonance by replicating the visual and ritual cues of beer consumption (same bottle, same context), enabling nondrinkers to maintain social identity in sporting gatherings.

Complementary to this, Consumption Ritual Theory (Rook, 1985) explains how drinking behaviours symbolise participation in group ceremonies. Beer consumption during football matches functions as a ritual of belonging. By embedding itself in these rituals, Heineken 0.0 sustains beer’s cultural role while democratising participation, extending the “round” to those previously marginalised by alcohol norms. Similarly, Symbolic Interactionism (Belk, 1988) suggests consumers use brands to construct shared meanings. In this sense, Heineken 0.0 bridges abstainers and drinkers through shared performance rather than shared intoxication.

In sum, triangulated evidence from social listening, focus group dialogue, and quantitative simulation confirms that Heineken 0.0’s strength lies in sociability rather than abstinence. The brand enables inclusion in shared rituals, removing the social cost of abstaining while preserving belonging. By aligning with humour and collective fan culture, Heineken 0.0 reframes non-drinking as participation rather than withdrawal.

These insights indicate that the brand's future success depends on embedding 0.0 within social and cultural contexts, maintaining its identity as an inclusive, taste-led extension of Heineken's brand equity.

# SOCIAL STIGMA AS THE BARRIER

The primary barrier to Heineken 0.0's adoption lies not in product performance, but in social perception. Alcohol-free beer challenges cultural norms linking alcohol consumption with sociability, confidence, and masculinity (Nicholls, 2023). Within social contexts like pubs, football gatherings, or celebrations, drinking signals belonging; abstaining, by contrast, threatens one's social identity. This aligns with Social Identity Theory (Tajfel, 1986) and Belk's (1988) extended self framework, which suggests that consumption choices communicate social affiliation. The core challenge, therefore, is not taste acceptance, but demonstrating that 0.0 represents genuine participation in social rituals.

## **Supporting Evidence:**

Focus group findings (**Appendix B**) revealed a tension between acceptance and hesitation. While participants acknowledged Heineken 0.0 as "tasting just like beer" and praised it as "lighter" and "smoother," several expressed discomfort with how it might be perceived in public. Comments such as "people might think it's fake beer" and "I'd feel judged if someone saw me drinking it" highlight the emotional and symbolic dimensions of stigma. Male participants reinforced gendered drinking norms Nicholls' (2023), and price intensified this stigma: "Why pay more for less?", framing Heineken 0.0 as a "premium for abstaining." This sentiment indicates a value dissonance, where the act of choosing an alcohol-free option not only risks social judgement but also feels financially irrational. From a psychological standpoint, this reflects normative influence (Cialdini, 2001), where individuals adjust consumption to align with perceived group expectations, even when personal preferences differ.

The synthetic focus group revealed stigma as an interplay between masculinity, genuinity, and peer perception. As described by participants, "drinking's social currency, if your mates see you drinking 0.0, it's like what's wrong with you?" This direct articulation underscores de Visser & Smith's (2007) findings that alcohol consumption functions as a performance of masculine identity, where abstention risks social demotion. However, the data adds a modern twist: participants also framed moderation as "smart" or "balanced," suggesting an emerging counter-narrative where responsible choices can enhance status rather than diminish it. This evolution hints at the reconstruction of masculinity around control rather than excess, a trend mirrored in Nicholls (2023) observations of shifting cultural scripts within the NoLo space.

The exchange highlights the persistent pricing paradox, “you’re taking something out, it should be cheaper,” revealing how economic rationality interacts with symbolic legitimacy. Together, these findings suggest that Heineken 0.0’s challenge is not just destigmatising sobriety, but reframing it as selective strength.

Qualitative insights position stigma as multidimensional, rooted in social signalling, perceived authenticity, and pricing parity, rather than taste rejection. In short, 0.0’s barrier lies less in its liquid performance than in its symbolic fit within the beer category.

Synthetic survey findings (**Appendix C**) confirmed that stigma-related resistance is concentrated among two key consumer groups. Social Flex Drinkers (Segment B), who regularly alternate between alcoholic and non-alcoholic options, show high openness to Heineken 0.0 in functional terms (88% choose it for social inclusion), but their loyalty is fragile and highly context-dependent. When tested with unified messaging (“The same legendary taste, now for every moment”), their responses indicated mild dilution of the parent brand, reflecting unease about authenticity.

Price-Conscious Switchers (Segment C) exhibited the strongest stigma-related resistance. They scored lowest on perceptions of brand authenticity (3.2 / 5) and highest on brand dilution risk (3.8 / 5). For this group, social legitimacy and price fairness jointly determine adoption, confirming that stigma and value are intertwined. By contrast, Taste Explorers (Segment D), who rated Heineken 0.0’s taste at (4.8 / 5) perceived no stigma, viewing it as a modern and credible innovation. This segmentation confirms that stigma is socially constructed, not inherent to the product itself.

These quantitative patterns mirror YouScan social listening results (**Appendix A**), where mentions of “fake beer” and “pretend” clustered around male-dominated sports discussions. Only 0.08% of mentions related to health, reinforcing that consumers frame 0.0 through a social lens rather than a wellness one.

### **Theoretical Interpretation:**

Heineken 0.0’s challenge lies in brand meaning transfer (Keller, 1993). The brand’s sociable, masculine, and authentic equity must transfer to a product that symbolically removes alcohol, the very attribute defining that identity. If poorly managed, this tension risks brand dilution (Peng et al., 2023), especially among segments like Price Switchers who equate “no alcohol” with “less real.” However, Heineken’s strong parent equity provides resilience. By reframing 0.0 as belonging without compromise, the brand can reinterpret its values of sociability, confidence, and taste, without losing authenticity. From a Backward Market Research perspective (Andreasen, 1985), this insight directly informs managerial decision-making: stigma is not solved through education or health messaging but through social normalisation. Marketing must embed Heineken 0.0 in shared experiences that symbolise connection and inclusion.

The findings confirm that consumers, particularly men, fear social judgement and perceive 0.0 as less “genuine”. These insights highlight that stigma reduction must be treated as a social marketing challenge, not a functional one.

Heineken should prioritise communications that emphasise confidence, taste parity, and shared enjoyment, rather than education or moderation messages. By portraying 0.0 as part of real social occasions, through humorous, relatable, and inclusive storytelling, the brand can redefine “not drinking” as a normal, confident choice preserving the masterbrand’s authenticity while expanding relevance to new drinking occasions.

# STRATEGIC RECOMMENDATION

Among the four segments identified through the synthetic quantitative research, Social Flex Drinkers (Segment B) and Taste Explorers (Segment D) should be prioritised. Social Flex Drinkers seek inclusive options that maintain social participation, while Taste Explorers are driven by taste innovation, key levers for reducing social stigma around non-alcoholic beer. In contrast, Price Switchers (Segment C) should be de-prioritised, as their price sensitivity limits long-term loyalty. To address pricing perceptions while maintaining profitability, short-term price parity during major sports events should be tested and monitored for effects on sales velocity, product mix, and cannibalisation.

Heineken 0.0’s positioning must sustain the masterbrand’s confidence and sociability, while building a distinct identity. Maintaining Heineken’s endorsement reinforces credibility while a differentiated tone builds 0.0’s identity. Meta-analytic findings (Peng et al., 2023), caution against relying on usage fit, promoting 0.0 as an “anytime drink”, as this weakens brand extension coherence. Instead, strategy should emphasise the fine taste and quality as the original Heineken, and value fit, underscoring the shared value of sociability. This framing ensures 0.0 is viewed not as a compromise, but as a credible continuation of the Heineken experience.

To communicate these values effectively, messaging should foreground social empowerment and taste parity, supported by KPIs tracking brand warmth, stigma reduction, and incremental trial. In social contexts, especially sports occasions, Heineken should spotlight 0.0 as enabling full participation for all drinkers. Humorous, socially attuned content is effective in normalising behaviour change. Ryanair’s use of self-aware humour to turn customer complaints into engagement (Benady, 2025) illustrates how irony can build likability and approachability. Similarly, encouraging user-generated content that celebrates 0.0 consumption can humanise the brand and accelerate stigma reduction, positioning Heineken as a facilitator of authentic connection rather than abstinence.

However, ethical and regulatory considerations remain central. Advertising alcohol-free variants risks criticism for indirectly promoting alcoholic products (Maesen et al., 2024). Heineken must therefore ensure transparency in youth-safe media targeting and clearly separate 0.0 from alcoholic messaging.

Upholding responsible marketing protects brand equity and aligns with Heineken's broader sustainability commitments.

To validate this strategy, a controlled A/B experiment should compare two creative approaches. (Group A) Heineken 0.0's social empowerment value against (Group B) a health-focused advertisement. Success metrics should track changes in willingness to drink 0.0 publicly (stigma reduction) and stability of Heineken brand equity (avoidance of dilution). This approach quantifies message impact and guides long-term communication investment.

Overall, this research shows that Heineken 0.0's growth depends on sustaining the parent brand's authenticity, redefining non-alcohol consumption as socially confident and inclusive. The insights reveal a dual dynamic, sports as a social accelerator highlights belonging, whilst social stigma as the barrier exposes lingering inauthenticity limiting adoption. Addressing this requires framing stigma reduction as a social-marketing challenge, not a functional one. Heineken should therefore prioritise sports, humour, and cultural storytelling that normalise 0.0 in real social occasions. By positioning Heineken 0.0 as a beer of inclusion and confidence, preserving drinking without compromise, the brand strengthens sociable equity, protects genuinity, and expands relevance across new drinking occasions.

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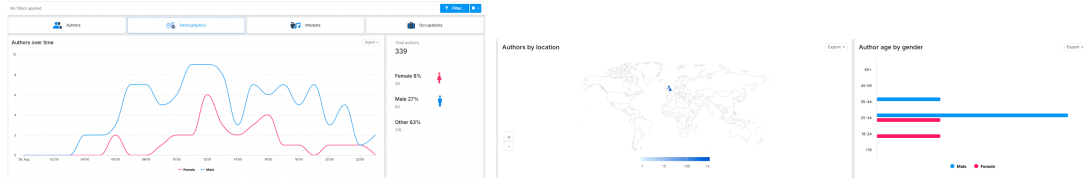
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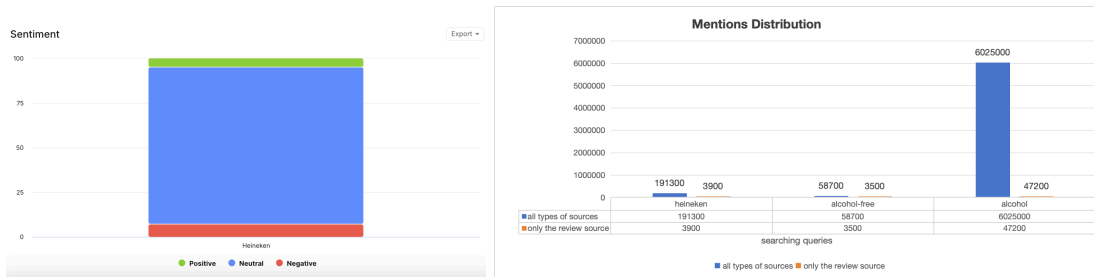
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# APPENDIX

## Appendix A - YouScan Insights Compiled



The social listening data shows that the typical Heineken consumer is a UK-based male aged 25-34, who makes up 27% of total online conversations. Engagement peaks around daytime and early evening, matching sports-viewing and pub hours. Men drive most of the discussion, while women make up 8%, and other users represent 63% of conversations. Most of this activity comes from the United Kingdom, confirming Heineken’s strong local presence.



Sentiment distribution				Sentiment distribution			
Category (for all types of sources)	Positive	Neutral	Negative	Category (only the review source)	Positive	Neutral	Negative
heineken	19.65%	74.54%	5.80%	heineken	48.72%	33.33%	17.95%
alcohol-free	23.00%	73.59%	3.41%	alcohol-free	6.03%	92.81%	1.16%
alcohol	15.63%	64.76%	19.61%	alcohol	52.75%	15.68%	31.57%

### Mentions Summary (September 29 – October 5)

Category	Number of Mentions	Percentage of Total Mentions
Total Mentions	2,598	100%
Social Context Mentions	17	0.65%
Health Mentions	2	0.08%

Reporting Period: September 29 - October 5, 2025

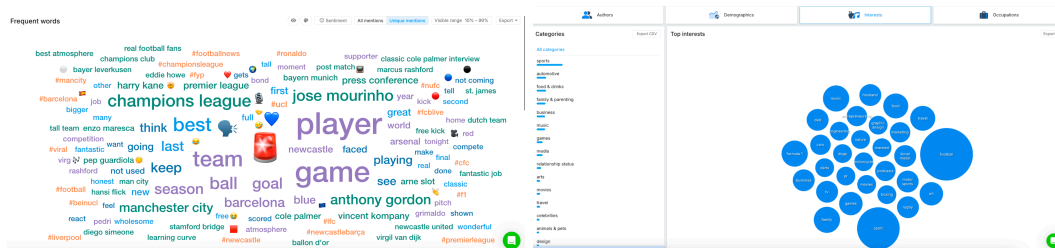
### Engagement Performance Comparison:

Metric	Humorous Posts	Topic Average	Variance
Sample Size	~20 posts	~150 posts	-
Avg. Engagement Rate	0.152%	0.061%	+149%

The data reveals that overall sentiment toward Heineken and alcohol-free beer remains largely neutral, indicating a stable and familiar brand image, but limited emotional engagement. Across all data sources: Heineken: 74.5% neutral, 19.7% positive, 5.8% negative, Alcohol-free: 73.6% neutral, 23.0% positive, 3.4% negative, Alcohol: 64.8% neutral, 15.6% positive, 19.6% negative. This pattern suggests that alcohol-free products generate fewer negative opinions and

slightly stronger positivity than alcohol-based ones, implying openness and curiosity toward 0.0 offerings. When filtered for review-type sources, which capture more explicit consumer opinions, the polarity increases: Heineken: 33.3% neutral, 48.7% positive, 18.0% negative, Alcohol-free: 92.8% neutral, 6.0% positive, 1.2% negative, Alcohol: 15.7% neutral, 52.8% positive, 31.6% negative.

Consumers therefore express stronger emotions toward alcoholic products, while alcohol-free options are discussed with detachment. Alcohol-free drinks are accepted but not loved, a sign of low controversy yet low emotional connection, highlighting the opportunity for 0.0 to build stronger identity and engagement. Volume analysis reinforced the imbalance between alcohol and alcohol-free discourse. “Alcohol” dominates with approximately 6 million mentions. “Alcohol-free” trails at approximately 58 thousand. “Heineken” appears in approximately 191 thousand mentions. This 13x difference illustrates that non-alcoholic categories remain niche within wider beverage conversations. However, the comparable sentiment profiles of “Heineken” and “alcohol-free” indicate room to normalise 0.0 as part of mainstream drinking culture. Between September 29 - October 5, there were 2,598 total mentions. Of these, only 0.65% related to social content and 0.08% to health. This confirms that discussions around Heineken 0.0 are socially driven rather than health-motivated. Consumers focus on belonging, participation, and shared experiences (e.g., watching football, group outings) rather than wellness or moderation benefits. Additionally, the data shows that humorous posts have a 149% higher engagement rate, meaning consumers highly relate to this type of content.



The above word cloud highlights that football dominates Heineken-related online conversations, with frequent mentions of terms such as “player,” “team,” “game,” “ball,” “Champions League,” and “Manchester City.” This confirms that the brand's online engagement is anchored in sports culture, particularly around major football tournaments and live match discussions. The accompanying interest map reinforces this link that sports-related topics form the largest cluster, followed by automotive, music, and gaming, reflecting the lifestyle dimensions surrounding Heineken’s consumer base. Mentions of “Jose Mourinho,” “Anthony Gordon,” and “Ronaldo” illustrate how the brand naturally enters conversations about well-known players, managers, and teams, positioning it within shared cultural moments and fan rituals. Building on the YouScan findings, two dominant behavioural insights emerged that reveal how consumers perceive and use Heineken 0.0, as a social substitute within shared occasions and as a taste-led evolution redefining the beer experience.

## Appendix B - Focus Group Key Takeaways

### **Purpose and Design:**

Two real focus groups and 1 synthetic one were conducted to explore how young UK consumers perceive Heineken 0.0 in comparison with the core Heineken brand, focusing on taste, brand associations, and social perceptions. Each session involved six UK-based participants aged 25-34 years old (four male, two female), representing typical young adult beer consumers. Participants completed a blind taste test of Heineken Original vs Heineken 0.0, followed by a guided discussion exploring attitudes toward taste, brand, authenticity, social acceptance, and pricing perceptions. Findings directly informed the project's two main insights: Sports as a Social Accelerator and Social Stigma as the Barrier.

### **Thematic Coding Summary:**

<b>Theme</b>	<b>Real Representative Quotes</b>	<b>Synthetic Representative Quotes</b>	<b>Linked Insight</b>
Taste Perception	“Lighter, smoother, fruitier.” “The regular one tastes sharper, more authentic.” “You can’t tell the difference.”	“If they can make it taste exactly like the real one, people will switch.”	Supports the taste-upgrade narrative, Heineken 0.0 can be positioned as a quality match, not a compromise.
Brand Recognition	“Heineken makes me think of the Champions League and Formula One.” “I’ve seen 0.0 more in pubs lately than before.”	“I like that it looks the same, not screaming ‘I’m sober tonight.’”	Reinforcing sports as a social anchor, Heineken’s event sponsorships drive awareness and normalisation of 0.0.
Social Stigma	“People might think it’s fake beer.” “I’d feel judged if someone saw me drinking it.”	“It’s more accepted now, but not on lads’ night,” “I’d have it after the gym or on a hot day. Not on a big night out.”	Reveals social scrutiny as a major adoption barrier; stigma strongest among young men.
Price and Value	“Why pay more for less?” “You basically are paying a premium for not drinking.”	“You’re taking something out that should be cheaper.”	Indicates need to remove the premium penalty, value parity required for wider adoption.

Functional Benefit	“I can drive after a night out if I drink 0.0.” “I’d get better sleep at night.”	It’s normal at lunch or during the week.”	Confirms control and confidence motivators but less emotionally resonant than social belonging.
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**Narrative Summary by Theme:**

**Taste Perception:** Four of six participants preferred the non-alcoholic version, describing it as “lighter” and “smoother.” Those favoring the original called it “sharper” and “more authentic.” The group agreed that the difference was minimal, suggesting that Heineken 0.0 can credibly match the sensory experience of regular beer, a strong platform for messaging around taste without compromise. **Brand Recognition:** Participants instantly associated Heineken with sports events such as Formula 1 and the UEFA Champions League. Many noticed Heineken 0.0’s growing visibility at these venues and in pubs. This reinforced the opportunity to embed 0.0 within sports-based social rituals, positioning it as a natural part of the fan culture rather than a wellness choice. **Social Stigma:** Despite increasing familiarity, participants expressed hesitation about ordering 0.0 in social settings, fearing judgement or being perceived as drinking “fake beer.” This stigma was strongest among male participants, highlighting a need for campaigns that reframe 0.0 as socially empowering and aligned with confidence and belonging. **Price and Value:** Most participants perceived Heineken 0.0 as too expensive for a non-alcoholic option. The phrase “premium for abstaining” emerged repeatedly, showing that current pricing undermines its accessibility. Consumers expect value parity with alcoholic beer to legitimise 0.0 as an everyday choice. Some also noted they would opt for a soft drink instead, viewing it as both cheaper and lower in calories, a more logical alternative when not drinking. **Functional Benefit:** The ability to be able to drive after a night out and to be able to retain better sleep at night were mentioned as practical advantages, but these were secondary to social and taste factors. This indicates that health or functionality messaging alone will not drive trial, emotional relevance and social normalisation remain more powerful levers.

**FULL TRANSCRIPT AND THEMATIC CODING AVAILABLE UPON REQUEST.**

**Appendix C - Quantitative Survey Data and Results**

A synthetic survey was designed using AI-assisted generation to replicate consumer responses while maintaining methodological rigour. Questions were built around predefined objectives drawn from qualitative insights, ensuring language remained clear, unbiased, and adaptive through dynamic sequencing based on participant inputs. AI tools were used both to simulate responses and to analyse outputs through automated data processing, predictive trend detection, segmentation, sentiment analysis, and visualisation. The synthetic sample collected was (N = 400) reflected the demographic and psychographic profile identified in social listening: primarily UK-based males (77%) aged 25-34, with strong interests in sports and automotive topics, representing typical Heineken consumers. Segmentation variables included user type (heavy vs light drinkers), decision style (price-sensitive vs quality-driven), and consumption context (social vs individual occasions). These parameters allowed the model to produce diverse and

contextually grounded data, supporting triangulation between qualitative insights and quantitative direction. Consumer types analysed were **Core Loyalists (25%)** are high-frequency beer drinkers who prioritise authenticity and help assess the risk of brand dilution. **Social Flex Drinkers (25%)** switch between alcoholic and non-alcoholic options, testing 0.0's role as a social replacer for new drinking occasions. **Price-Conscious Switchers (25%)** are low-loyalty, promotion-driven consumers whose reactions reveal how discounting affects long-term equity. Finally, **Taste Explorers & Brand Upgraders (25%)** are quality-oriented drinkers drawn to innovation and taste, validating 0.0's potential as a premium extension. Together, these segments capture the functional, social, and perceptual dynamics shaping Heineken 0.0's growth strategy.

Questions asked in the Survey
<p><b>Please rate your overall feeling about the following brands:</b></p> <p>a) Heineken Original (Alcoholic Beer)</p> <p>b) Heineken 0.0 (Alcohol-Free Beer)</p>
<p>Have you tried Heineken 0.0?</p>
<p>To what extent do you agree with the following statement: "Heineken 0.0 is the best-tasting alcohol-free beer I have tried."</p>
<p>When you choose to drink Heineken 0.0, which of the following reasons are most important to you? (Select all that apply):</p> <p>A. I can still participate socially when others are drinking alcohol.</p> <p>B. I am driving or need to be fully alert soon after.</p> <p>C. I prefer the taste/flavour profile of 0.0 over other options.</p> <p>D. It helps me reduce my alcohol intake/support a healthy lifestyle.</p> <p>E. It's suitable for daytime/mid-week drinking occasions.</p>
<p>On a weekday evening (e.g., Tuesday) when you are having dinner with friends, which option makes you feel the most included in the social atmosphere?:</p> <p>A. Having a regular alcoholic beer (e.g., Heineken Original).</p> <p>B. Having an alcohol-free beer (e.g., Heineken 0.0).</p> <p>C. Having a soft drink/water.</p> <p>D. I do not feel included regardless of what I drink.</p>
<p>Imagine a campaign that strongly links Heineken 0.0 to the main brand, using the slogan: "The same legendary taste, now for every moment." How does this statement impact your perception of...</p> <p>a) Heineken 0.0?</p> <p>b) Heineken Original?</p>
<p>Now, consider a campaign for Heineken 0.0 that uses the slogan: "Taste Innovation: A crisp upgrade to your daily rituals." Does this message make you more likely to try 0.0 in new</p>

situations (e.g., lunch, mid-afternoon)?

Thinking only about Heineken Original (the alcoholic beer), how much does the existence of Heineken 0.0 make you think the main brand is:

- a) More modern and innovative?
- b) Less authentic or "beer-like"?

Imagine Heineken has \$10 million to invest in advertising for both products. How should this budget be split to ensure the long-term health and growth of the overall Heineken brand?:

- a) Percentage to invest in Heineken 0.0 campaigns (focused on sales volume/new occasions)
- b) Percentage to invest in Heineken Original campaigns (focused on core brand value/equity)

If you saw Heineken 0.0 heavily discounted (e.g., 50% off) for a sustained period, how would this affect your willingness to pay a premium price for the Original Heineken?

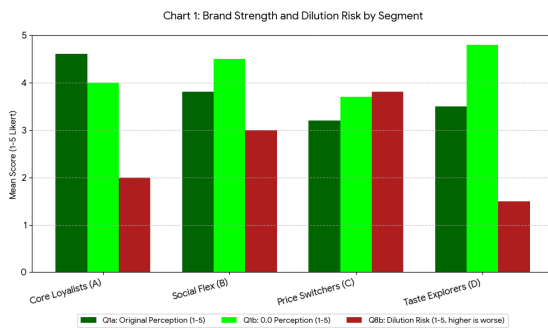
What is your gender?

What is your age group?

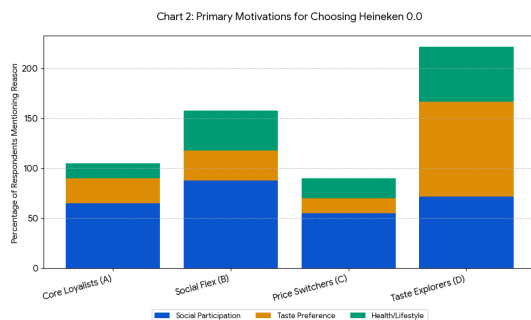
In a typical week, how often do you consume any type of beer (alcoholic or alcohol-free)?

Do you regularly purchase and consume alcohol-free beers?

### Summary of Data Insights:



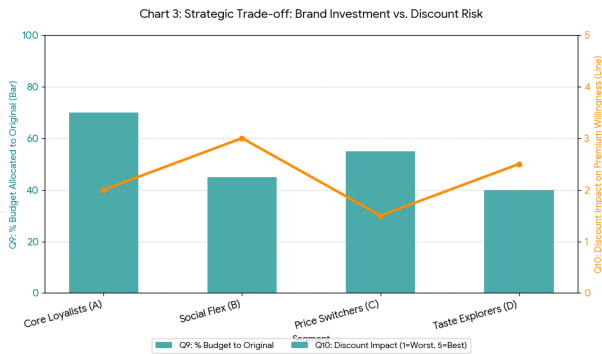
the lowest perception of the Original brand (Avg 3.2) and poses the highest risk of brand dilution (Avg 3.8). They are the most skeptical of 0.0's existence damaging the core brand's authenticity.



**Chart 1: Brand Strength and Dilution Risk:** This chart compares the average perception scores (1-5 Likert scale) for both brands and the perceived risk that 0.0 makes the Original brand feel "Less authentic/beer-like" (where 5 is the highest risk). **Segment D** (Taste Explorers) is the most enthusiastic about Heineken 0.0 (Avg 4.8) and perceives the lowest risk of dilution (Avg 1.5), suggesting they view 0.0 as a brand upgrade. **Segment C** (Price Switchers) holds the lowest perception of the Original brand (Avg 3.2) and poses the highest risk of brand dilution (Avg 3.8). They are the most skeptical of 0.0's existence damaging the core brand's authenticity.

**Chart 2: Primary Motivations for Choosing Heineken 0.0:** This stacked bar chart shows the percentage of respondents in each segment who selected specific reasons for choosing Heineken 0.0 (multiple choice). **Segment B (Social Flex)** is the primary target for the "Social Replacer" insight, with

**88%** citing social participation without alcohol as a key driver. Their choice is functional. **Segment D (Taste Explorers)** is the primary target for the **"Taste-Redefining Extension"** insight, with **95%** choosing it for the taste itself. Their choice is sensorial and premium-driven. This confirms that 0.0 needs distinct messaging to capture both the functional (B) and the taste-driven (D) growth occasions.



**Chart 3: Strategic Trade-off: Brand Investment vs. Discount Risk:** This dual-axis chart visualizes the conflict between investing in the core brand's equity (Q9) and the risk posed by potential short-term sales tactics (Q10). **Brand Equity Protection (Q4):** Core Loyalists (A) demand the largest investment in the Original brand (**70%** budget allocation), underlining the necessity of safeguarding the main brand's

long-term health. **Short-Term Risk:** Segment C (Price Switchers) confirms the risk of **commoditization**, rating the potential impact of 0.0 discounting on their willingness to pay a premium for Original as the lowest (**Avg 1.5**). The data strongly suggests that the right balance between the efficiency of one unified campaign and the clarity of distinct messaging lies in a **"Unified Masterbrand, Segmented Value Proposition"** approach.

### High-Confidence Insights vs Genuine Uncertainty

1. High-Confidence Insights (What the Data Strongly Confirms): These patterns align with established marketing theory and the clear segment definitions, making them reliable cornerstones for the strategy.

Insight Area	Confirmed Pattern	Strategic Implication
Brand Dilution Risk	Price-Conscious Switchers (Segment C) are the most critical weak link. Their low perception of Original (Avg 3.2) combined with high sensitivity to discounting (Q10: Avg 1.5) proves that pricing tactics on 0.0 directly threaten the premium equity of the core brand.	Heineken must maintain price discipline and avoid deep, frequent discounts on 0.0 to protect the Original brand's value.
Growth Drivers	The two key growth pillars are clearly defined: Function (Social Flex Drinkers, 88% choosing 0.0 for inclusion) and Taste (Taste Explorers, 95% choosing	The 0.0 marketing strategy cannot be singular; it must employ distinct messaging to efficiently target these two different, highly motivated consumer

	0.0 for flavour).	groups.
Brand Protection Mandate	Core Loyalists (Segment A) demand that long-term strategy prioritise the core brand (70% budget allocation to Original, Q9).	Any growth strategy for 0.0 must be framed as complementary to, not replacing, the Original brand's premium status and core consumption occasions.
Brand Modernization	Segments A and D view 0.0 as making Heineken more modern and innovative (Q8a Avg 4.0 and 4.5).	Positioning 0.0 as a taste-driven innovation, rather than a health compromise, actively strengthens the overall Heineken masterbrand image.

**2. Genuine Uncertainty (Areas Worth Real-World Testing):** These findings suggest strong relationships, but their magnitude and practical implications in a dynamic market need external validation to inform major investment decisions.

Uncertainty Area	Synthetic Data Finding	Necessity for Real-World Testing
The True Cost of Dilution	Segment C is highly sensitive to unified messaging (Q6b, Avg 3.0) and severe discounts (Q10, Avg 1.5).	How much purchasing volume does Segment C represent? We need to validate if their negative perception translates into a measurable decrease in actual Heineken Original sales, or if they are a low-value segment whose opinions can be strategically ignored.
Scalability of the Taste Message	The "Taste Innovation" message generated near-perfect intent for new usage occasions within Segment D (Avg 4.9).	Does the Taste message resonate beyond the highly engaged Segment D? We need to test if emphasizing "upgrade to your ritual" can convert less taste-focused consumers (A, B) and scale the premium positioning to the mass market.
Competitive Context of 0.0	Social Flex Drinkers (B) prioritise the social function of 0.0 over taste.	Is Heineken 0.0 competing for 'share of throat' against other non-alcoholic beers, or against general non-alcoholic beverages (soda, water)? The answer dictates optimal distribution (bar/pub vs. supermarket aisle) and messaging focus (taste-off vs. inclusion).

## **Appendix D - Secondary Research Key Findings**

### **1. Consumer Perceptions and Social Context (Stigma & Inclusion)**

- a. UK consumers are confused by “alcohol-free” definitions (0.0%, 0.5%, etc). Social Stigma remains a key adoption barrier, especially among men, who fear judgement for choosing non-alcoholic beer. **(Nicholls, 2022)**
- b. Group settings amplify reluctance to choose NoLo drinks; social acceptance and normalisation messaging reduce perceived stigma. **(Nicholls, 2023)**
- c. Social identity strongly predicts willingness to try non-alcoholic beer. Inclusion-based messages (“part of the moment”) outperform health-led ones. **(Bartram et al., 2024)**

Relevance: communication should target normalisation and belonging rather than abstinence.

## **2. Taste, Sensory Quality, and Product Perception**

- a. Taste, availability, and price are top drivers; consumers prioritise sensory parity over health benefits. NAB’s matching regular beer on bitterness and colour scores higher on acceptance. **(Gliszczyńska-Świgło et al., 2025)**
- b. Poor taste perception remains the most cited barrier; even health-conscious consumers reject products that don’t match the expected flavour profile. **(Ramírez Pagès et al., 2024)**

Relevance: leading with flavour and quality reframes 0.0 as an upgrade, not compromise.

## **3. Brand Architecture, Extension, and Equity**

- a. Zero-alcohol variants can transfer positive brand equity but risk dilution if the fit feels inconsistent with the parent brand. **(Bartram et al., 2024)**
- b. Meta-analysis of 250+ brand extensions shows success depends on attribute fit (taste/quality consistency) and value fit (same brand meaning), not just usage fit (“beer can drink anytime.”) **(Peng et al., 2023)**
- c. Advertising alcohol-free variants can boost sales of the main alcoholic brand, especially when campaigns stress sociability or taste rather than health. **(Kharismatyawati & Sihite, 2023)**
- d. The CBBE model underlines that positive brand equity depends on strong, favourable, and unique associations, for Heineken 0.0, this means aligning sociability and quality cues. **(Keller, 1993)**

Relevance: supports strategic direction to keep a unified visual identity, but a distinct tone, preventing “brand contamination.”

## **Appendix E - Generative AI Usage**

The use of AI was used in three ways during this project. The first use of AI was Google Gemini in order to build the survey data, these are some of the prompts used:

“Gemini, think you are an expert market researcher. You are going to run a synthetic survey to drive insights to answer the questions below.[questions given]. Before structuring the survey, I did secondary research and social listening about the topic. And we should build the survey questions based on the insights from the research and try to make questions that can also answer

the given questions above.[insights explained]. Funnel the questions, from more general to more specific. Overall measures (attitude, satisfaction) should come first, demographics should come last. Make sure to mix likert and multiple choice.”

“Set sample size at N = 400), Set demographics and segments based on social listening insights: Male (77%) Female (23%) in the 25-34 age group who is located primarily in the UK. The overwhelmingly high interest in Sports and Automotive, combined with frequent conversation about "player & game," Specify past buyer behaviour: frequency, spend, loyalty, etc., Include usage context (e.g., when/where the product is consumed), Vary decision styles: price-sensitive vs quality-driven, impulse vs planned.”

“Refer to the previous survey + sampling definition, Run in batches (e.g. 10–20 respondents at a time) to increase variation, Produce distributions, not just average ensuring at least 20% of respondents give extreme ratings (1 or 5)”, Add randomness/ noise: occasional inconsistent or illogical answers.”

The second use of AI was ChatGpt being used to create the synthetic focus group results, some of the prompts used was as follows:

“You are acting as an experienced market research moderator conducting a synthetic focus group to explore perceptions of Heineken 0.0 (alcohol-free beer) among UK adults aged 20–30. Please simulate a 40-minuted focus group discussion with 6 participants (4 men, 2 women) representing distinct consumer segments relevant to Heineken 0.0:

1. Core Loyalist – drinks Heineken Original frequently, skeptical about 0.0.
2. Social Flex Drinker – alternates between alcoholic and non-alcoholic drinks, socially motivated.
3. Price-Conscious Switcher – buys what’s on promotion, low brand loyalty.
4. Taste Explorer / Brand Upgrader – quality-oriented, curious about innovation.
5. Health-Motivated Moderator – interested in moderation for wellness.
6. Image-Conscious Social Drinker – concerned about peer perception and social judgement.

The discussion should run for around 40 minutes and use open-ended questions that encourage depth, interaction, and emotional reflection. Encourage natural group dynamics agreement, disagreement, interruptions, humour, pauses, or moments of hesitation.”

The third use of AI was to fix grammar and come up with different phrasings/words that could replace the one we currently had. ChatGpt was used for this and some of the prompts were as follows:

“Could you please suggest a more academic phrasing to the following sentence: *This approach will reinforce consumer confidence and minimize the risk of brand dilution.*”

# PROJECT COMMENTARY

This report was structured by following the Backward Market Research framework (Andreasen, 1985), which shaped our approach from problem identification to insight generation. At its essence, this report addressed Heineken's managerial decision problem: *How can Heineken expand its 0.0 category, while maintaining brand equity, and overcoming social stigma and negative pricing perceptions?*

Instead of starting with data collection, Heineken's decision context was identified to ensure that every research step directly supported the brand positioning objective within the NoLo beverage market. In line with the project requirements, a mixed-method approach was adopted, integrating qualitative exploration and quantitative validation. This signalled our understanding that topics such as non-alcoholic beverage consumption require both emotional depth and behavioural confirmation. Through this integration, this report demonstrated the distinction between exploratory and descriptive research, enabling qualitative identification of the underlying reasons for consumer attitudes and the quantitative testing of message framing effects. Together, these methods illustrate the concept of triangulation, which increases the robustness by combining different data sources around a unified managerial objective. Through this approach, the Backward Market Research framework's decision-oriented research emphasis was applied, aiming to turn insights into strategic recommendations instead of being purely descriptive.

Throughout the research process, several key principles were applied to ensure both design and interpretation. Social listening concepts guided us to analyse organic consumer conversations by using thematic and sentiment analysis to identify common associations around credibility, flavour, and social norms. Additionally, the rationale behind the experimental design guided the design of the synthetic survey, where different message versions were tested to evaluate their influence on consumer attitudes and intentions towards Heineken 0.0.

While this approach was effective in meeting the research objectives, several limitations remain to be acknowledged. While the focus group size (n=6) each time was appropriate for qualitative research, the narrow age range of participants (25-34) might have limited the variation in perspectives and generalisability of the findings to the broader Heineken 0.0 target market. As alcohol consumption involves a certain level of sensitivity, participants may have adjusted their answers to match perceived social norms, and group dynamics might have shaped the participants' willingness to share their experiences. However, the focus groups were valuable in generating interaction-based insights. In fact, different opinions expressed during the discussion suggest that participants were comfortable and not hesitant to share their views, suggesting that social sensitivity did not pose a significant limitation. Beyond this, social listening analysis (YouScan) provided real consumer conversations but the quantitative section was based on a synthetic dataset demonstrating experimental testing rather than representing actual consumer reactions. This research design achieved the intended goal of practising quantitative validation but inevitably diminished external validity.

Despite these constraints, this report effectively illustrated the application of research frameworks to real-world marketing contexts that guide managerial decision-making.