



# RAISING THE BAR

How the UK On-Trade is failing to meet the demand for alcohol-free.

Everleaf<sup>®</sup>   
NON-ALCOHOLIC APERITIFS

**KAM**

# RAISING THE BAR

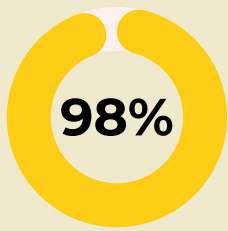


Over the past decade, the UK's drinking culture has shifted. British people are drinking less alcohol, less often, with younger generations leading the charge toward moderation.

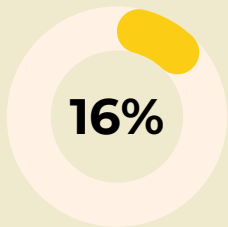
Even in social settings like pubs, bars, and restaurants - traditionally seen as the heart of British drinking culture - guests are increasingly looking for alcohol-free options. Yet, despite this shift, as an industry we are falling short in catering effectively to this growing demand.

In partnership with Everleaf – the UK's #1 independently owned non-alcoholic brand – KAM Insight conducted an in-depth audit across 131 venues in London and Manchester, representing 3,832 UK pubs, bars and restaurants, during November 2024. The metrics captured relate to the availability, accessibility, and visibility of alcohol-free options and find that ***UK pubs, bars and restaurants are a long way from having the credible and visible range of alcohol-free options which our guests are currently seeking.***

# Despite 1-in-3 visits to pubs, bars and restaurants being alcohol-free, customers *still* encounter *limited options*



of venues have **at least one alcohol-free option** (outside of traditional soft drinks)



of the venues **ONLY** offered alcohol-free beer



As the demand for credible alcohol-free beverages grows, so do customer expectations for a greater variety of options. **45% of customers expect more than one choice of alcohol-free beer and 31% expect more than one choice of alcohol-free spirit\***. Just with alcoholic drinks, consumers seek specific alcohol-free alternatives that align with their tastes and the current range in venues is leaving customers wanting.

## % of venues which offer alcohol-free (AF) options:



Source: KAM x Everleaf - Raising the Bar 2024, \*KAM x Lucky Saint - Low+No 2024

# Customers are forced to search for alcohol-free options at the bar

According to customers, **visibility has improved** over the last 12 months across all low & no categories in UK bars, pubs and restaurants\* but many venues are still not making them visible to customers at the bar - meaning customers are searching for them, and too often they're not visible at all.

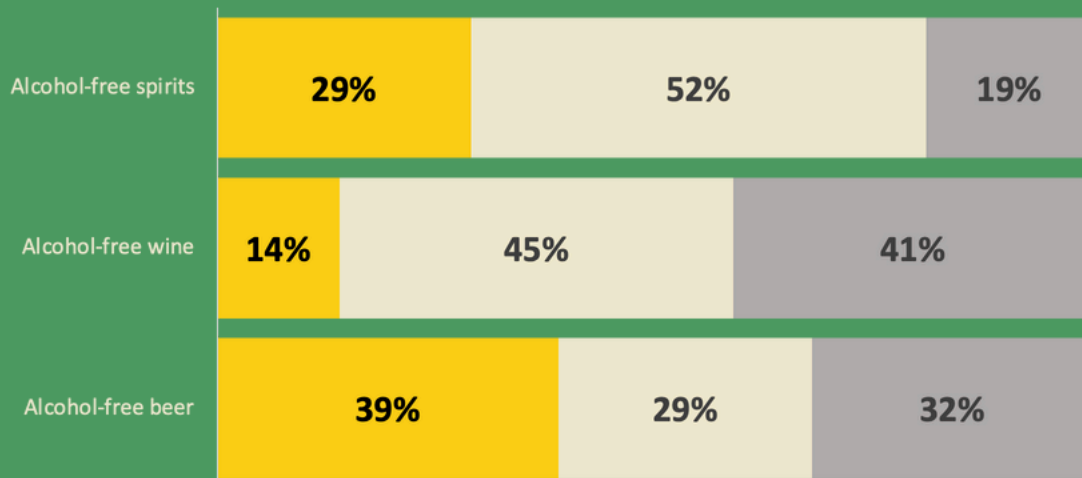


## How visible are the alcohol-free options when standing at the bar?

**VERY CLEARLY VISIBLE**

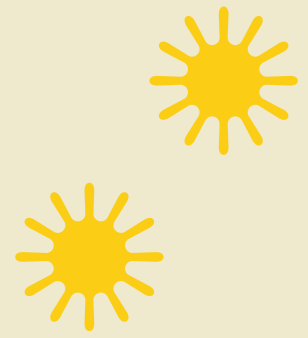
**NEED TO SEARCH FOR THEM**

**NOT AT ALL VISIBLE**



Source: KAM x Everleaf - Raising the Bar 2024, \*KAM x Lucky Saint - Low+No 2024

# Alcohol-free options are still often omitted from the menu



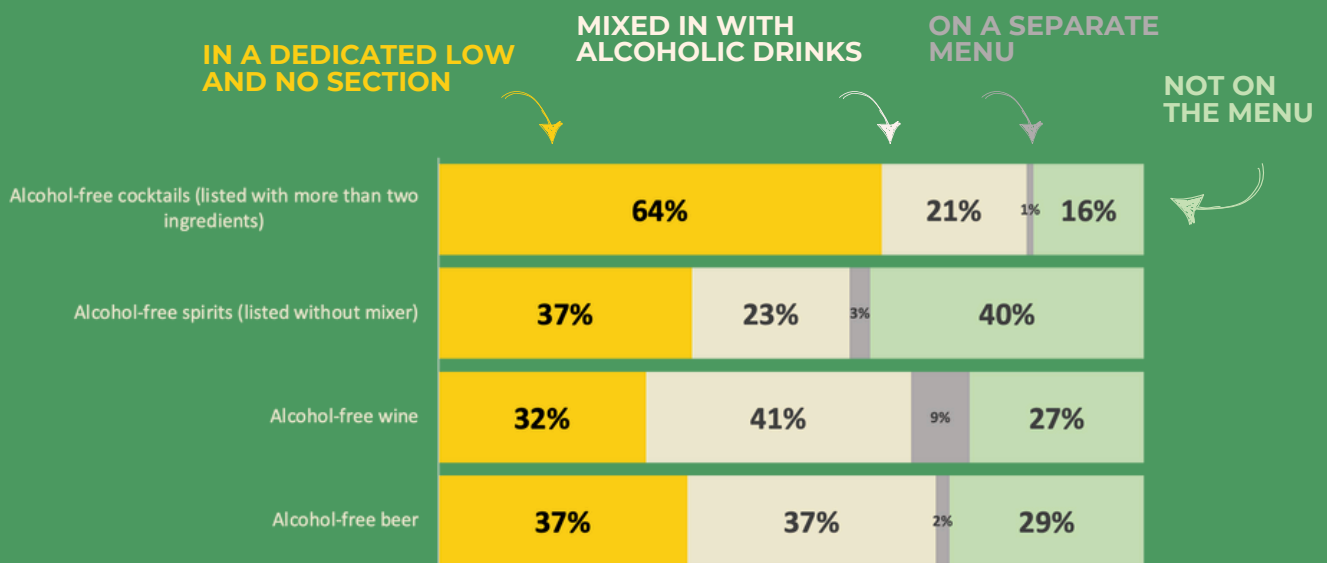
**40%**

of customers say if venues improved the visibility of low and no drinks it would encourage them to try them\*

**52%**

needed to actively search for alcohol-free spirits when looking at the bar (19% said the alcohol-free spirits weren't visible at all)

## Where on the drink menu do alcohol-free variants feature? (where alcohol-free versions are available)



Source: KAM x Everleaf - Raising the Bar 2024, \*KAM x Lucky Saint - Low+No 2024

# Venues *hide* alcohol-free spirits and customers are *unclear* where to look for them



**8.9 million** UK adults tried an alcohol-free spirit for the first time last year, and 18% of Brits now say they drink an alcohol-free spirit at least once a month\*. Yet, despite this increasing demand from consumers venues are still hiding them from their customer!

40%

Of venues who stock alcohol-free spirits **don't list them on their menu**

75%

Of venues who stock alcohol-free spirits **don't feature ANY alcohol-free cocktails** on the menu

And when alcohol-free cocktails are listed, there's inconsistency in placement on the menu meaning customers are often unclear where to find them (and of course if they're available at all.)

64%

Of venues have a dedicated "low and no" cocktail section

21%

Of venues Integrate alcohol-free cocktails with alcoholic options

1%

Of venues use a separate alcohol-free menu entirely

Everleaf advises listing alcohol-free cocktails in both the main cocktail menu *and* a dedicated "low and no" section – **yet only 1.5% of surveyed venues currently do this.**

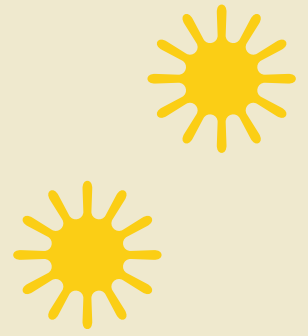


Source: KAM x Everleaf - Raising the Bar 2024, \*KAM x Lucky Saint - Low+No 2024

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# Moderators are the 'new vegetarians' (but have fewer options)



## 2-in-3

UK adults say non-drinkers in their group **influence the choice** of venue(s) in some way (rising to 85% of 18-24 year olds)\*

Just as vegetarians, vegans, and those with allergies influence venue choice, non-drinkers often sway group decisions. Yet, despite the growing number of teetotalers and moderators, alcohol-free options remain limited.



Of Brits are vegetarian\*\*

**7%**

**V**

**16%**

Of UK adults don't drink any alcohol\*\*

Of food menus audited had vegetarian options

**100%**

**V**

**70%**

Of drinks menus had AF options listed

Of dishes on menus were suitable for vegetarians

**37%**

**V**

**18%**

Of cocktails on drinks menus were alcohol-free or available alcohol-free

Source: KAM x Everleaf - Raising the Bar 2024, \*KAM x Lucky Saint - Low+No 2024, \*\*YouGov

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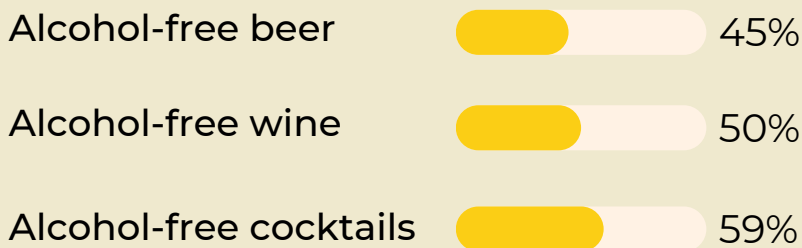
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# Finding venues with a credible range of alcohol-free options *remains a challenge*



Of Brits will research low & no options ahead of time if they're moderating, when choosing a venue (this rises to 61% of 18-24 year olds)\*

**% of venues who have their alcohol-free drinks listed on a menu *on the venue's website*:**



**1-in-2** Venues **DO NOT** have any alcohol-free drinks listed via their google business listing

**1-in-5** Have a **menu uploaded to their google listing** which features alcohol-free drinks

**1-in-5** Have a **link from their google listing to their website** which features alcohol-free drinks

Source: KAM x Everleaf - Raising the Bar 2024, \*KAM x Lucky Saint - Low+No 2024



# TOP 5 TIPS



## to raise the bar for alcohol-free drinks

Everleaf is one of the most widely distributed brands in our survey, present in 16% of the outlets represented. Since their launch in 2019, they have been testing and optimising menu placements to see what operators should consider to get the most out of this category.



**Visibility** - If it's not on the menu, it won't be in the order. Ensure your non-alcoholic drinks are prominently featured to catch the customer's eye. Don't hide alcohol-free options at the back. Consider placing alcohol-free cocktails upfront or in a box at the top of your food menu.

**Flavour First** - Make it sound irresistible by highlighting flavours in the title - creating a sensory experience. "Cherry Blossom Spritz" outperforms "Virgin Gin and Tonic." We also found that consumers are increasingly saying no to terms such as 'Mocktail' or 'Virgin'.

**Pricing** - Consider this carefully, to ensure your pricing reflects the value of the craft and care you have put into the cocktail. Anything less than 75% of the standard cocktail price may send the wrong message, but ultimately, it's your call.

**Showcase the Brand** - Mention the brand in the description to anchor the price and value proposition. For instance, "Everleaf is a B-Corp non-alcoholic aperitif made from the world's most wonderful plants."

**Take Pride** - Be proud of your low and no-alcohol offerings. We know that when you have a good range, you attract the 1-in-3 people looking for alcohol-free drinks, and they will bring their friends.

To download a detailed guide from Everleaf on these menu tips, visit [HERE](#).



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How the UK On-Trade is failing to meet the demand for alcohol-free.



*The growth in low and no has moved rapidly past a 'trend' into the mainstream, but the true size of the opportunity is yet to be fully unlocked by many pubs, bars and restaurants.*

*Visibility of alcohol-free drinks is the key to success - behind the bar, on the menu and clearly shown on the website.*

*This is crucial to attracting more customers, who will stay for longer, and spend more in venues if they feel they are in an inclusive environment where everyone is welcome; whatever drink they happen to have in their hand.*

Daniel l'Anson, Commercial Director, Everleaf



FIND MORE TOP TIPS ON EVOLVING YOUR ALCOHOL-FREE RANGE AND MENU [CLICK HERE](#) OR SCAN QR CODE.



Everleaf was founded by a conservation biologist turned bartender who knows the world's plants and how to use them. They distil non-alcoholic aperitifs with nature's tastes, textures and aromas so bartenders and consumers can craft great drinks.

For more information, contact  
**[hello@everleafdrinks.com](mailto:hello@everleafdrinks.com)**



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