

LOW
+ NO

KAM

In partnership with:

LUCKY SAINT
ALCOHOL FREE HERITAGE BREWING. MODERN DRINKING.



**DRINKING
DIFFERENTLY** /2025

FOREWORD

“As a society, the choices around what we consume are changing. People are making deliberate decisions about how they use their time, how they take care of their physical and mental wellbeing, what they choose to eat and drink. Alcohol-free drinks are playing a major role in this for people, as the move of consciously choosing to drink less alcohol continues at pace.

Historically, alcohol-free consumption has been about specific times of the year, or for certain occasions. Now everyone is drinking it, right throughout the year and through the week. It’s changing throughout an individual day too – you can now buy an alcohol-free beer with your lunchtime meal deal in supermarkets.

People are adapting how they drink in more varied ways than ever. The continued rise of zebra striping and bookending are examples of how people are increasingly choosing to drink in a way that is more health-conscious, and better suits their lifestyles. Expectations have now shifted – more and more people are expecting quality alcohol-free options in their local pubs, bars and restaurants and it’s important we continue to respond to the demand.

The growth of the alcohol-free category is clear. To give an example closer to home, the IWSR predicts that this year alcohol-free is set to become the second largest overall beer category by volume worldwide, behind lager.

We’ve come a long way collectively as an industry, but there’s still lots to do throughout the country. The opportunity for alcohol-free drinks to deliver in positively impacting public health is huge, and I look forward to working with this amazing industry in taking the category forward in the years to come.



LUKE BOASE, FOUNDER, LUCKY SAINT

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The data in this report is based on online interviews with a nationally representative sample of 2,000 UK adults (over 18 years) carried out in April 2025.

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DRINKING DIFFERENTLY: THE RISE OF MODERATION

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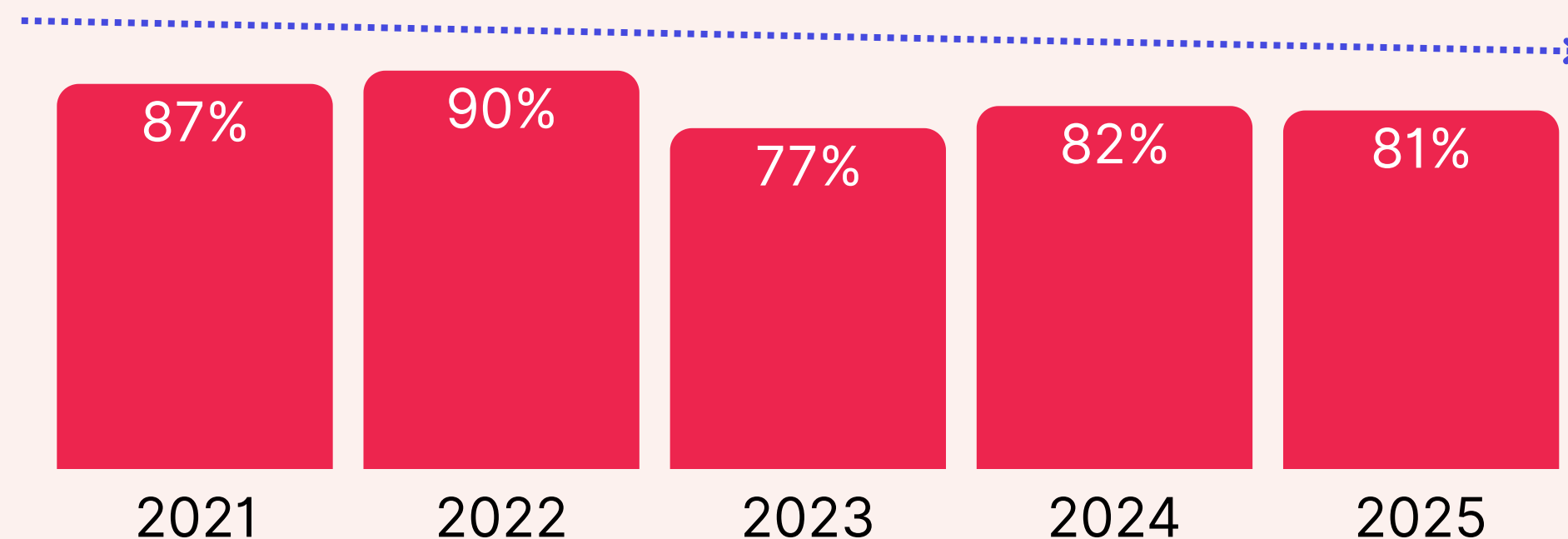


ALCOHOL CONSUMPTION CONTINUES ITS DOWNWARDS TREND

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Over the last 4 years, KAM data suggests an overall downward trajectory in the frequency of alcohol consumption by UK alcohol drinkers. **4.1 million fewer UK adults are consuming alcohol on a weekly basis in 2025 than in 2021.** 18-24 year-olds are consuming alcohol the least frequently, with 78% drinking once a week or more, whereas 25-34 year-olds are the most frequent consumers, with 85% drinking alcohol once a week or more. **49% of UK adults (who drink alcohol) say they are planning on reducing their alcohol intake in 2025 compared to 2024.**



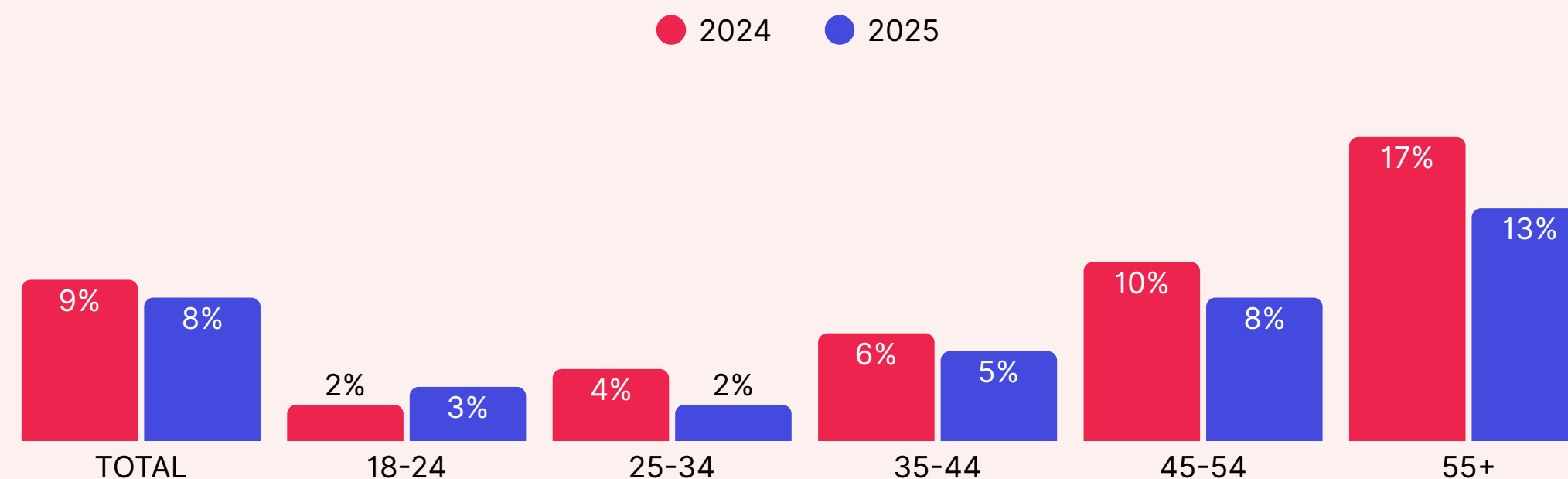
% of UK alcohol drinkers who claim to consume alcohol at least once a week or more.

VOLUME OF ALCOHOL CONSUMED HAS ALSO DROPPED

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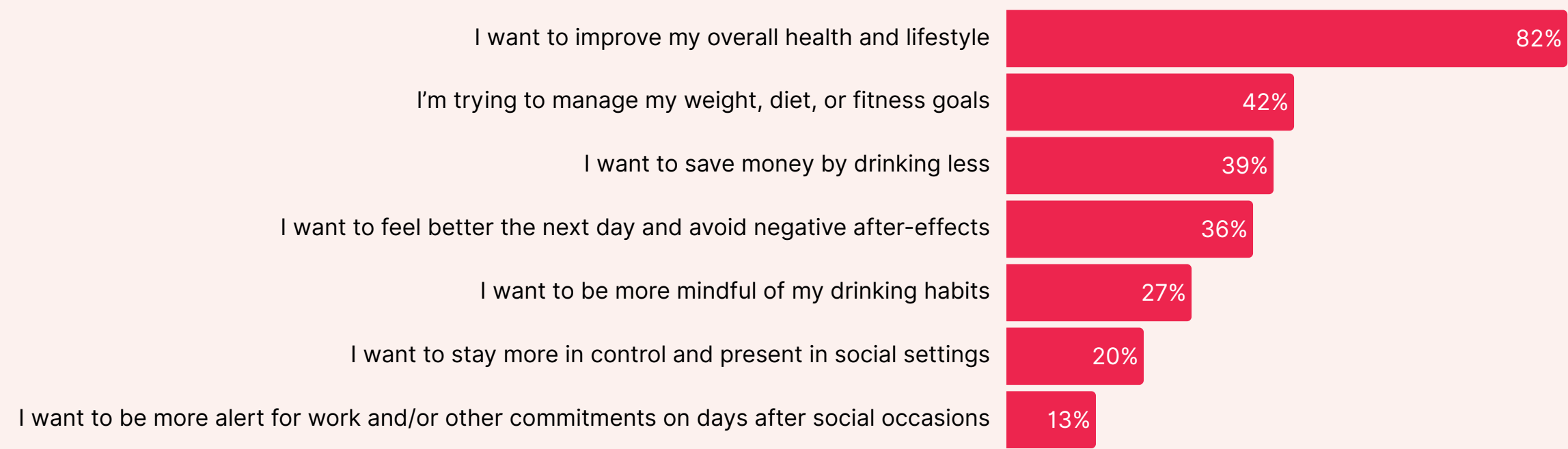
There has been a decline in volume of alcohol consumption over the past five years. The % of UK adults consuming 15 or more units per week has dropped 8ppts since 2021, with the most significant year-on-year change observed in individuals aged 55 and older. While it seems that the decrease in alcohol intake is stabilising, there remains a growing trend of people opting for low and no-alcohol options.



% of UK adults (18+) drinking 15+ units per week
(above UK CMO recommended no of units)

HEALTH IS THE MAIN REASON TO REDUCE ALCOHOL CONSUMPTION

In 2025, many plan to reduce alcohol intake for health reasons such as enhancing physical and mental wellbeing, managing weight, and improving sleep. Motivations include pursuing a healthier lifestyle, following their doctor's advice, avoiding addiction, and setting a positive example for others. This trend reflects a broader alignment with wellness goals as consumers increasingly see their drinking choices as part of their personal development and self-care, elevating low and no-alcohol options to essential elements of their identity. 30% of UK adults own a smartwatch (which tracks health data), rising to 46% of 18-34s.^(*) The increased prevalence of wearable technology gives consumers more feedback than ever on the impact of their alcohol consumption and indicates a growing interest in personal health goals.



Why UK alcohol drinkers are planning on reducing their alcohol intake in 2025.

(*) Source: YouGov Survey, March 6-7, 2025



MODERATION IS NOW PART OF EVERYDAY DRINKING CULTURE

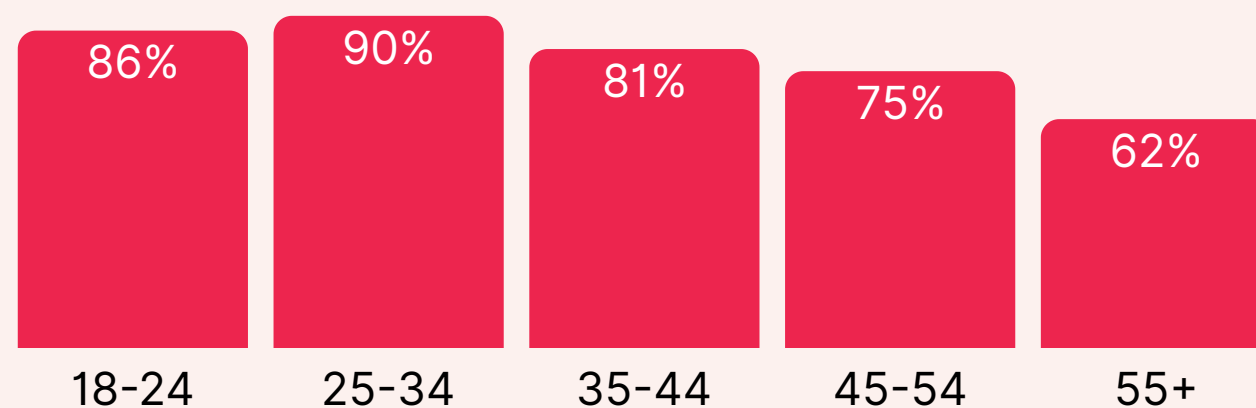
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76%

of Brits who drink alcohol say they are **'actively moderating'** their alcohol intake to some extent

Compared to 74% in 2024

% moderating by age group



The majority of consumers across all age groups are moderating, indicating a universal trend. Under 35s continue to be the most likely to claim to be moderating.

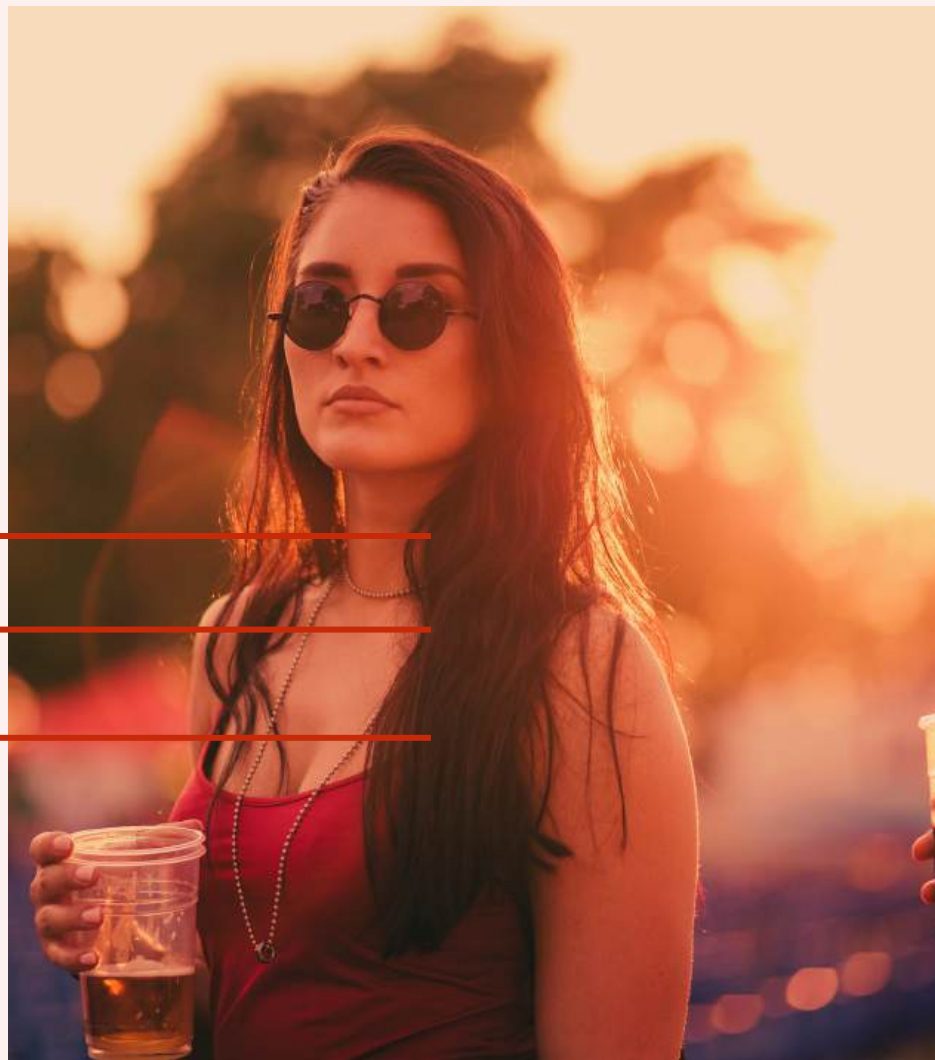


A CULTURAL SHIFT

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This year's survey results reflect a continued cultural shift toward conscious drinking, especially among younger adults. While alcohol remains widely consumed, the fact that over three-quarters are actively moderating suggests a substantial behavioural transition which is consistent year on year.

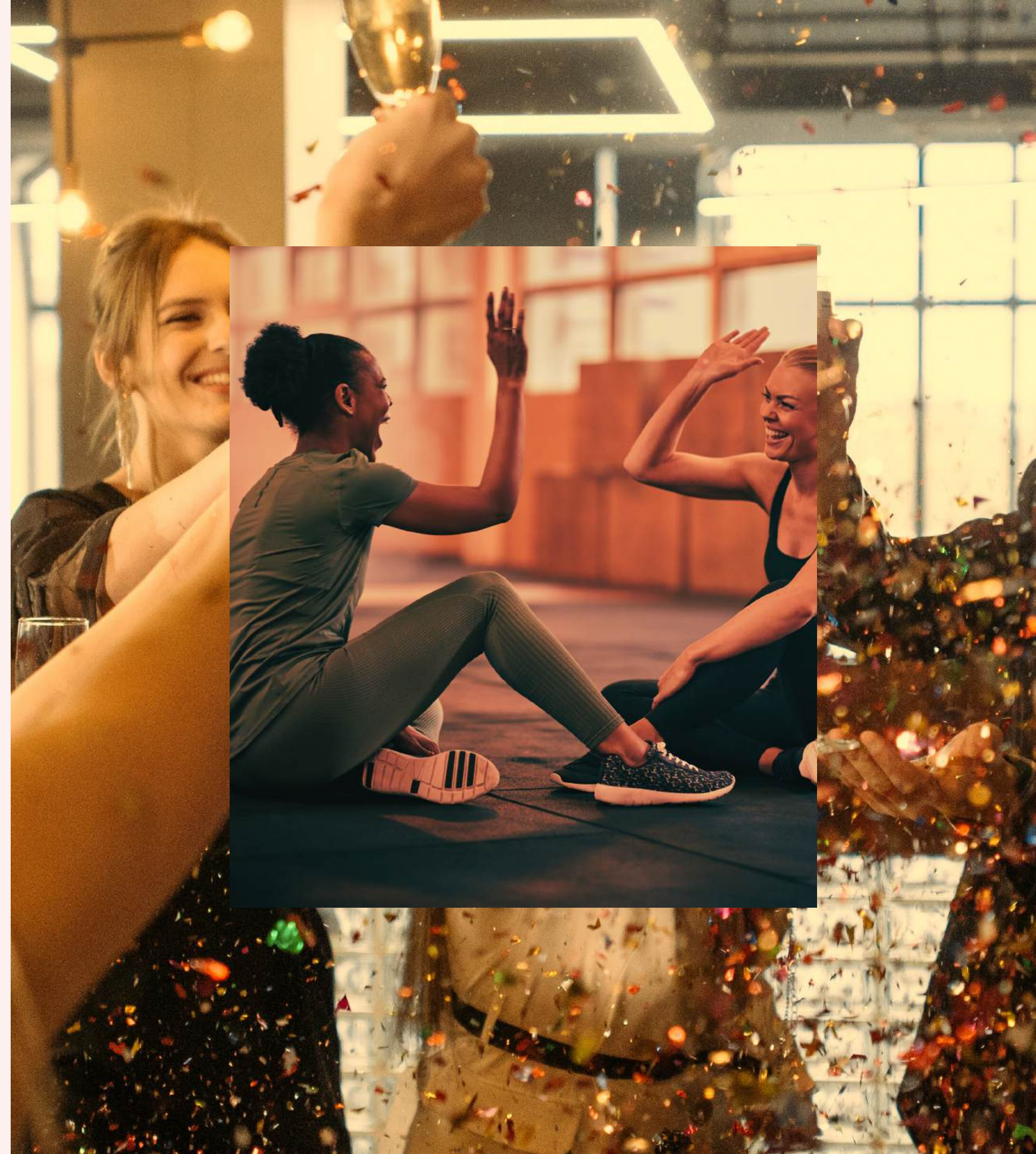
This duality - with high numbers both consuming alcohol and moderating - indicates that people aren't necessarily abandoning alcohol, but are approaching it with more intent. The 'mindful drinking' trend is solidifying into a long-term cultural shift, and brands that support more flexible, mindful drinking behaviours will be best positioned to stay relevant.



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SOCIETAL SHIFTS IN DRINKING CULTURE

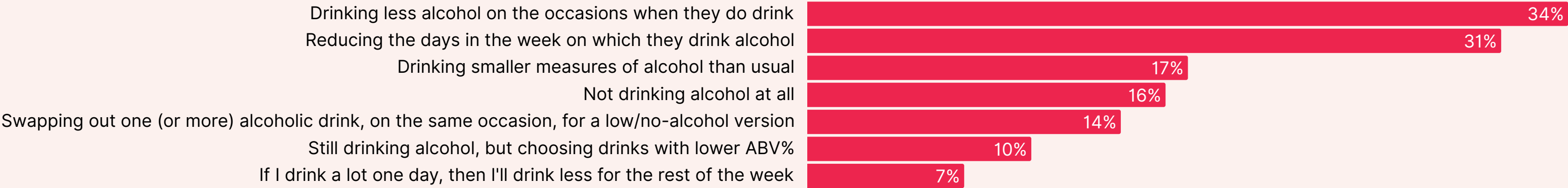
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MODERATION IS NOW PART OF EVERYDAY DRINKING CULTURE

3 in 4 UK adults are moderating their alcohol consumption to some extent. Within this group of moderators, the most popular approaches are:

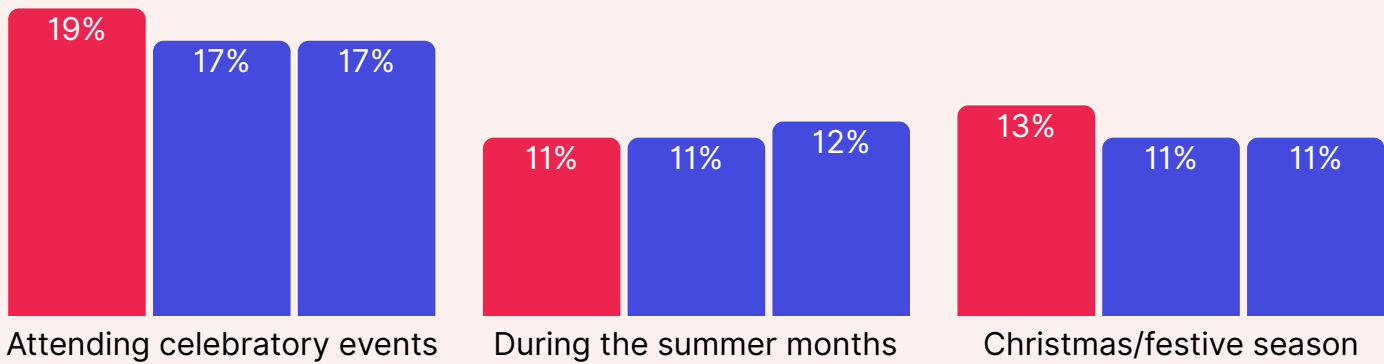
Q. If you are currently moderating your alcohol intake, how are you doing this?



% who plan to moderate their alcohol intake* across annual events/occasions

2025 2024 2023

Moderation habits are consistent year-on-year across annual events, suggesting they are ingrained social habits rather than seasonal trends.



We know that consumers aren't generally replacing alcohol outright, but are moderating strategically. This supports the rise of a flexible drinking model where consumers move between full-strength, mid-strength, and low & no depending on the context. Moderation exists equally across weekdays and weekends, and through traditional 'alcohol-led' events and seasons. Rather than viewing moderation as a linear reduction, it's a dynamic behaviour that accommodates lifestyle rhythms and individual moods.

SOCIETAL SHIFTS

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Social perception is a powerful driver of behaviour, and it's clear that abstaining or moderating from alcohol is becoming increasingly normalised. As cultural taboos around not drinking erode, more consumers now believe they are free to choose low & no drinks without fear of judgment. This marks a profound societal pivot: drinking less is no longer a solution to a problem, but actually reflects self-discipline, social awareness, and modernity. It's social empowerment for the new generation.

59% Say there is less stigma around drinking alcohol-free versions of drinks than there used to be

56% Say there is less stigma around not drinking alcohol when going out than there used to be

36% Are more careful now about how much alcohol they drink in front of work colleagues
Rising to 53% for 18-35s

36% Say it's less acceptable among their peers to 'get drunk'

28% Say it's less acceptable to buy alcohol using their work credit card

15% Drink less alcohol now because they are concerned about photos appearing on social media
Rising to 33% for 18-35s

“

The shift towards moderation in drinking culture has been hot topic in recent years, of course, influenced by growing health, wellness, and social trends

For us and our venues it only benefits our customers, as we attract mixed groups looking for a wide offering and variety of drinks, from fantastic beers and cocktails to lower alcohol drinks and of course a good selection of non-alcohol drinks.

With our main USP being the huge array of games, we offer, Ping Pong, Pool, Shuffleboard, Interactive Darts, Ten Pin Bowling, to name but a few, when we couple this with drinks that delight all our guests, and we can only see a strong offering developing.



BEN WARREN
COMMERCIAL DIRECTOR
PROFESSIONALS AT PLAY

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EVOLUTION OF THE LOW&NO DRINKER

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LOW & NO CONSUMPTION CONTINUES TO RISE AS CONSUMERS EXPAND THEIR REPERTOIRE OF BRANDS AND PRODUCTS

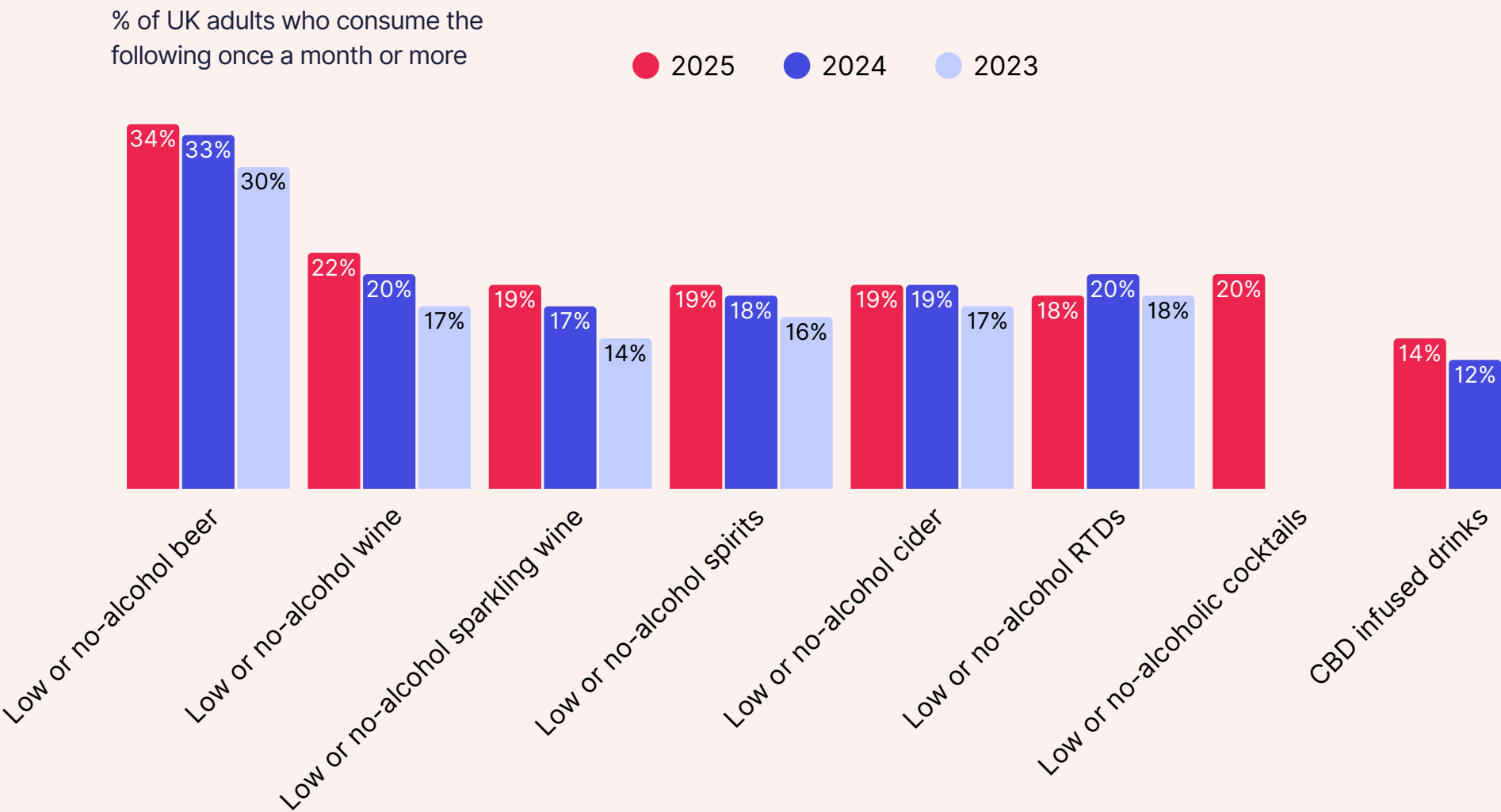
22%

say they are drinking more alcohol-free drinks now compared to 12 months ago

34% say more for 18-24s

40%

say they have tried more low & no alcohol brands this year compared to 12 months ago

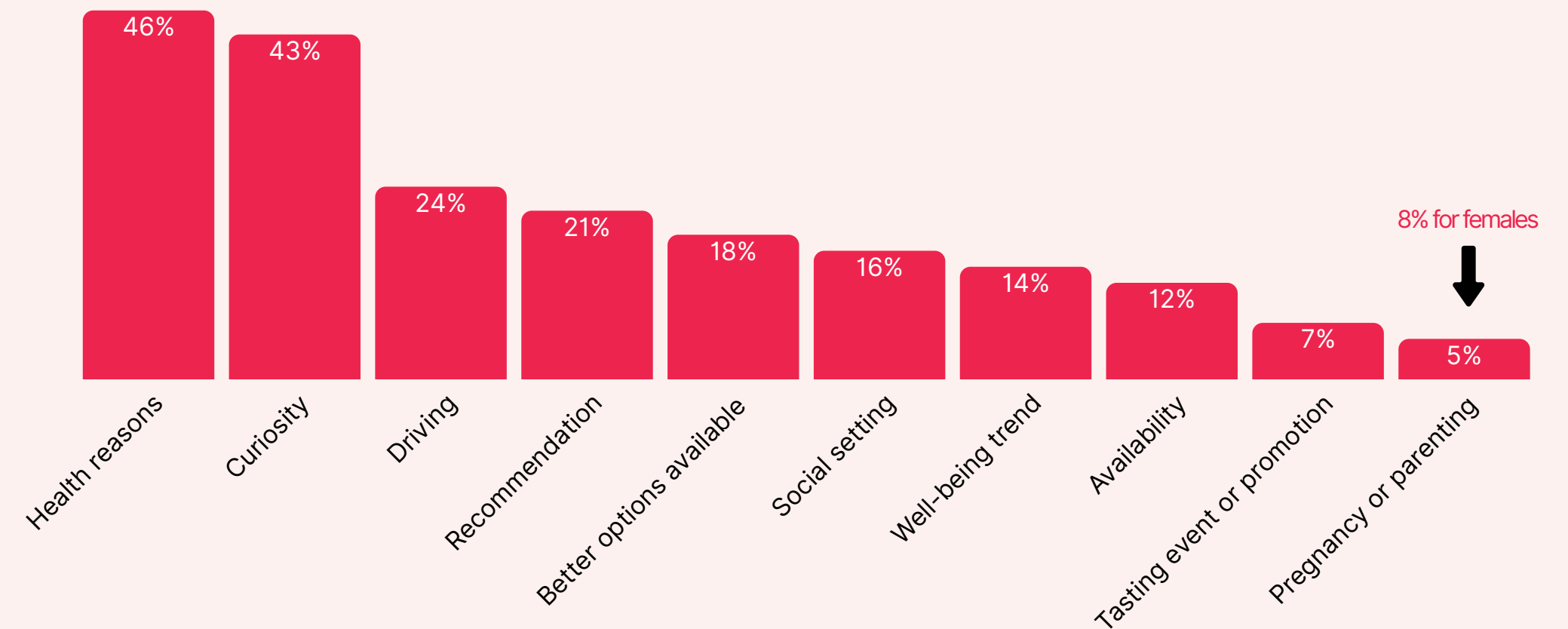


HEALTH REASONS ARE DRIVING LOW&NO TRIAL

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Health is the leading reason people try low and no-alcohol drinks for the first time, reflecting a strong shift towards wellness and mindful living. Curiosity is another major motivator, with many simply wanting to explore new options and experiences. Practical factors like the need to stay sober while driving, or recommendations from friends or influencers also play a role. As the quality of products improves, more consumers are willing to trial, especially in social settings where these drinks are increasingly accepted.



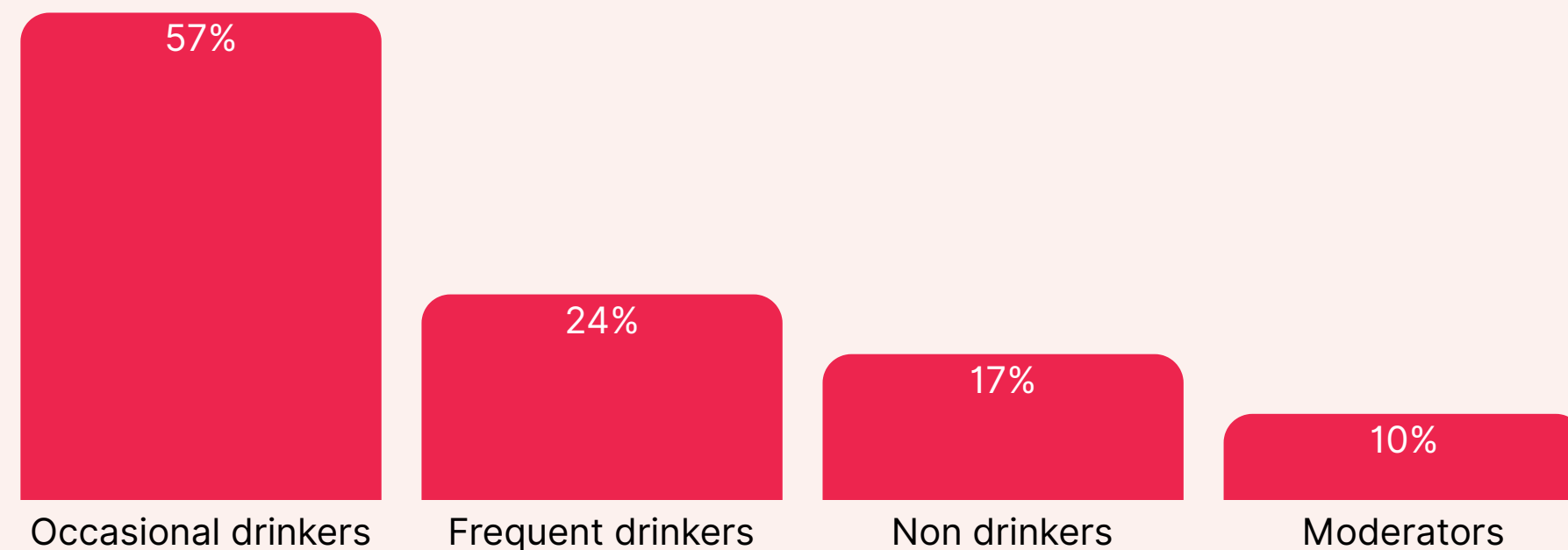
What encouraged consumers to try low & no for the first time?

BUILDING OUR PERSONAL IDENTITY

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Just like with food, our drinking habits are becoming part of how we define ourselves.

As is the case with labels like vegetarian or flexitarian, consumers are defining themselves as different types of drinkers. The majority of consumers identify themselves as occasional drinkers



Three out of four consumers are actively moderating their drinking habits, yet only 10% would identify themselves as moderators. This indicates that moderation may not be a label consumers use for themselves; instead, it's simply an evolution of what they perceive as their typical drinking behavior. Being mindful of how consumers describe their behaviour rather than using industry terminology can help brands become more relatable.



PEER INFLUENCE STILL PLAYS A PIVOTAL ROLE IN INFLUENCING BEHAVIOURS

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Despite increasing acceptance, many consumers still feel judged for choosing low or no-alcohol drinks. A significant number would prefer these options if they were under the radar. A small number feel uncomfortable ordering alcohol-free versions in social settings, though this discomfort lessens when others are moderating as well. Peer pressure is strong, especially among younger adults aged 18–34, with 4 out of 5 feeling compelled to drink if others do. Social dynamics are a major barrier to moderation, making it vital to normalise low and no-alcohol choices in group settings for broader acceptance.

39%

would be more likely to drink low & no if other people around them were unaware and/or wouldn't judge them (was 40% in 2024).

8%

feel uncomfortable ordering an alcohol-free version of an alcoholic drink when in a pub, bar or restaurant if everyone else they are with is drinking alcohol.

39%

would feel more comfortable if at least one other person was also moderating.

58%

feel the pressure to drink alcohol if everyone they are out with is drinking alcohol, even if they may be looking to moderate their alcohol consumption (80% for 18–34s).

SOCIAL ACCEPTANCE

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Social acceptance is both a barrier and a catalyst for change. While peer pressure persists, especially for young people, it also creates powerful positive reinforcement when peers collectively moderate. The insight here is not just about reducing stigma - it's about creating visible, inclusive environments where moderation feels like the norm. Promoting communal experiences around low & no that are aspirational rather than abstinent will ensure that everyone feels like they are at the party.



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MODERATION OCCASIONS AND TACTICS

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CONSUMERS HAVE A MIXED PORTFOLIO OF ABV STRENGTHS IN THEIR REPERTOIRE

Nearly 4 in every 10 ‘alcoholic’ drinks consumed are NOT full strength.

The split of consumption for the average consumer, between full strength, mid-strength and low & no alcoholic drinks is as follows:



64% are full strength



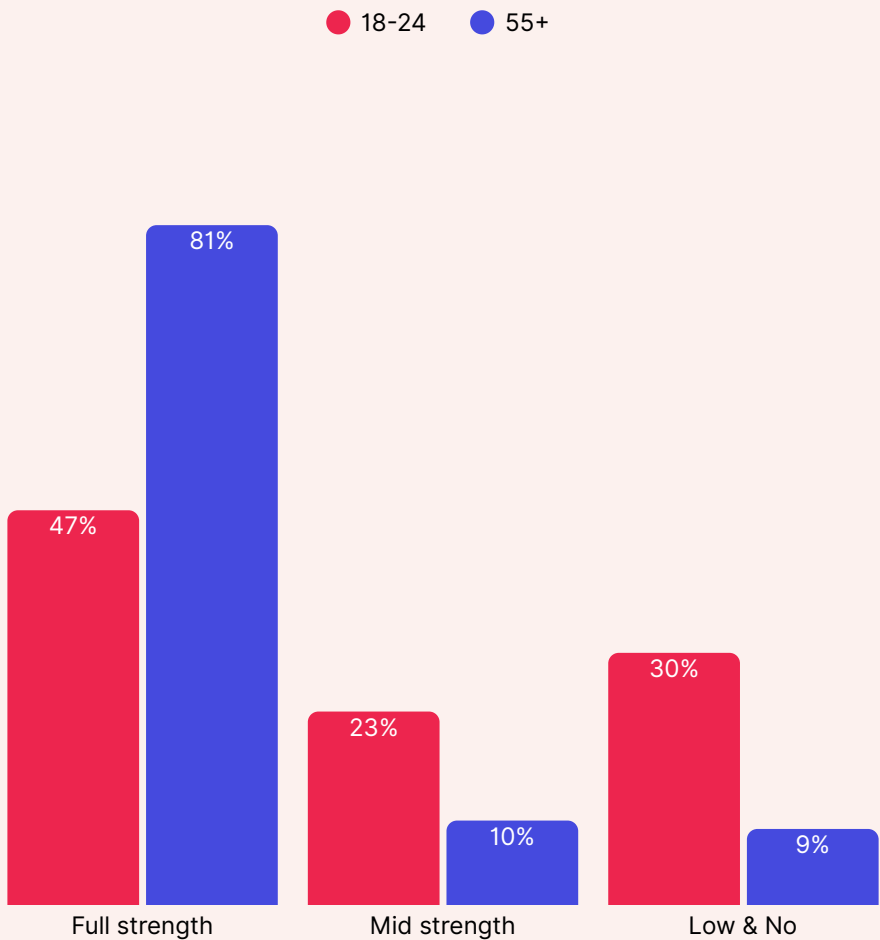
16% are mid-strength



20% are low & no

The split across the three core segments varies drastically by age groups. Younger consumers are drinking more low & no and mid-strength compared to the over 55's, whose drinking habits remain heavily weighted to full-strength alcoholic drinks.

Low, mid & full-strength consumption:
18-24-year-olds vs. those 55+



MODERATION TACTICS DURING SOCIAL DRINKING OCCASIONS

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The following are the key tactics that consumers are employing when they are actively moderating on a social occasion.



34% have ZEBRA STRIPED

Alternating between alcohol-free
or low & no and alcoholic drinks

Was 28% in 2024



20% have COASTED

Drinking mid-strength
alcoholic drinks throughout

Was 25% in 2024



30% have GONE NO

Drinking only alcohol-free
drinks throughout

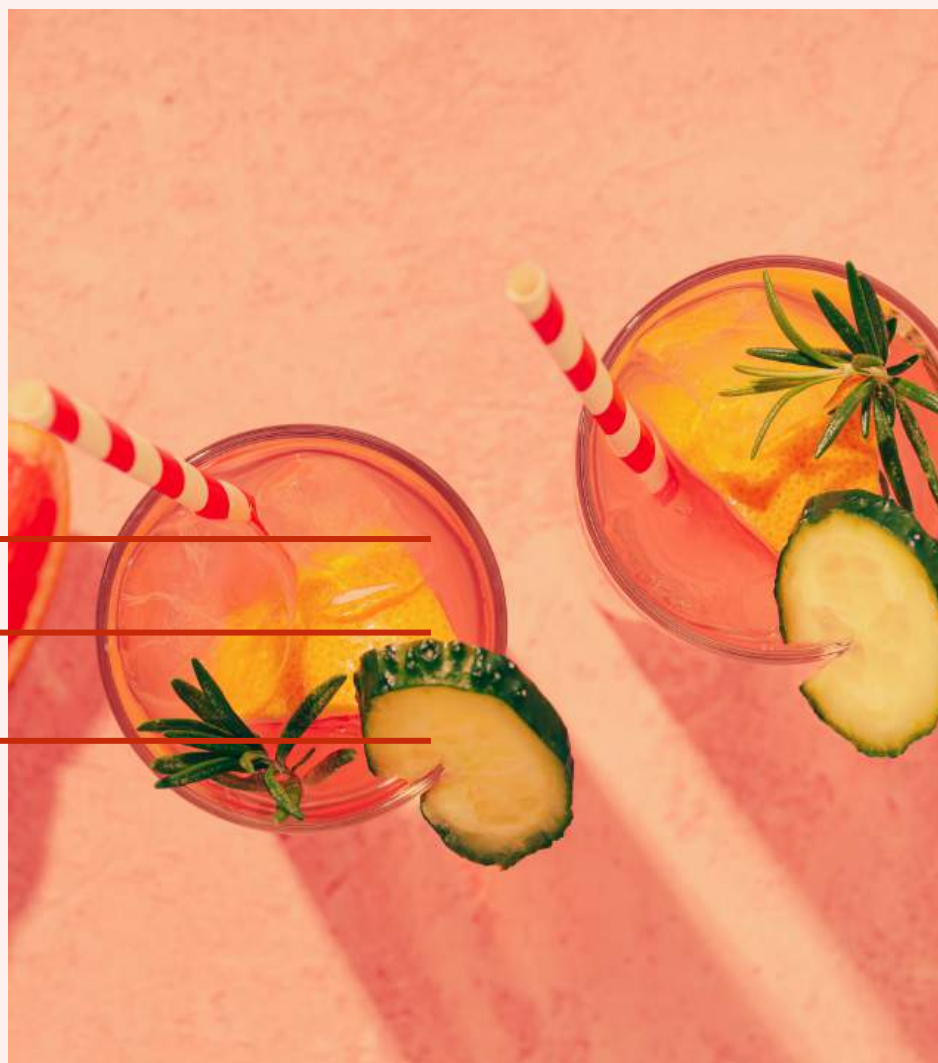
Was 30% in 2024

Moderation has become strategic and responsive to how people feel throughout an occasion. These patterns suggest that low & no offerings should not be confined to the start or end of a night - they have relevance throughout the drinking journey and across less traditional alcohol occasions. Ensuring availability, appeal, and quality/experience parity with alcoholic options at all stages will be key to supporting these evolving consumption rhythms.

Having a glass of water in between alcoholic drinks is not necessarily a new thing, but by putting a name to these tactics, it helps cement them in people's minds and allows customers to feel more comfortable embracing this behaviour.

THE NORMALISATION OF LOW & NO

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The steady increase in low & no consumption, particularly among younger generations, demonstrates its firm foothold in the drinking repertoire. Notably, this isn't about niche adoption anymore; low & no is becoming a normalised segment of the overall beverage mix for all age groups. Furthermore, the growth trajectory will continue as more young drinkers age into higher-spending brackets and seek quality, functionality, and social alignment in their choices.

THE LOW & NO HOUR

Bookending refers to the practice of beginning and/or ending a social gathering with a low or non alcoholic beverage. This technique helps to manage alcohol intake, aiming to lower overall consumption while still allowing for enjoyment of a drink during an event.

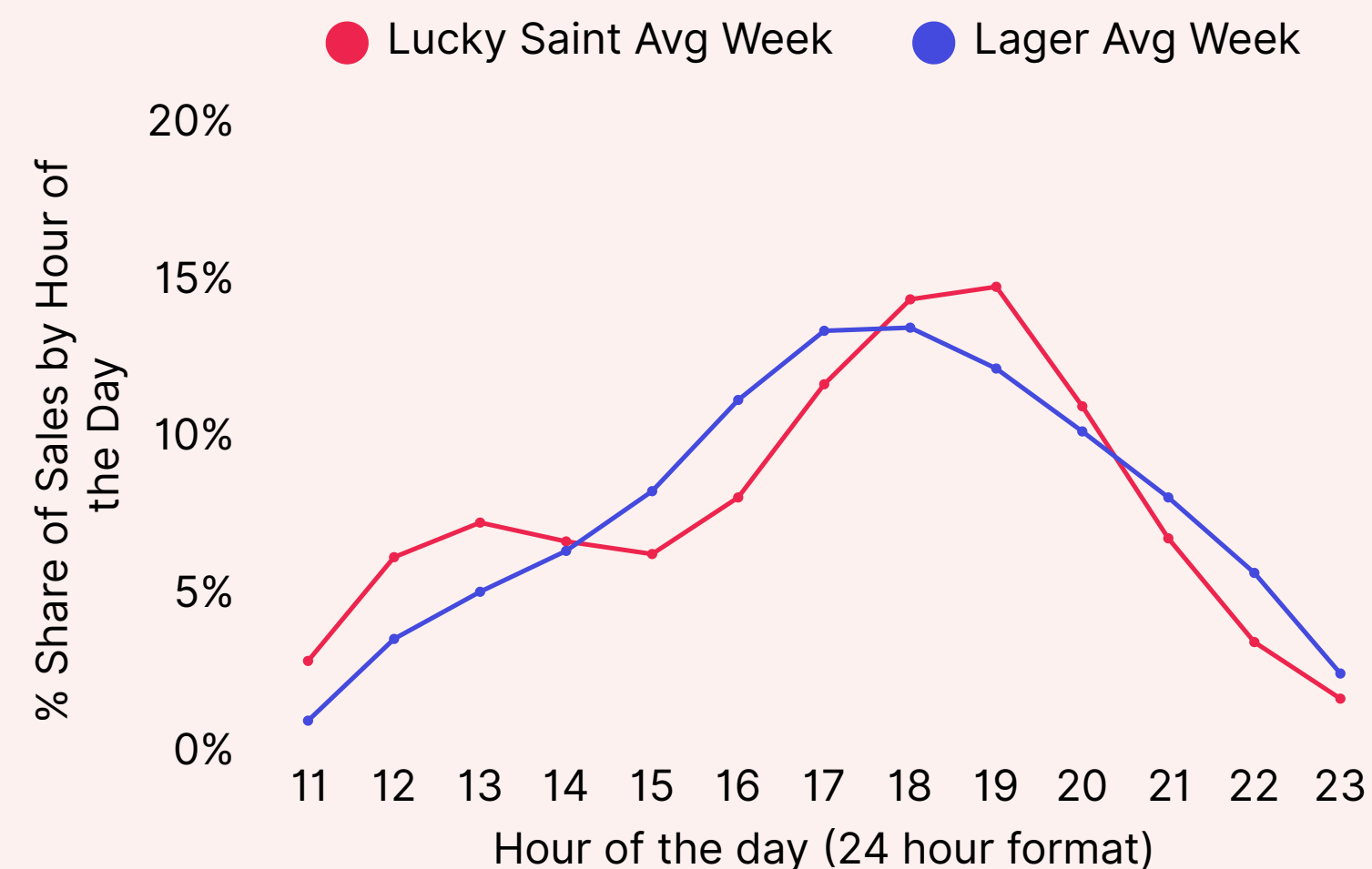
26%

say they have **started** a social event on an alcohol-free drink

29%

say they have **ended** a social event on an alcohol-free drink

Data from Oxford Partnership reveals a notable increase in Lucky Saint draught sales at 100 locations during the lunchtime period (11am to 1pm) and the early evening period (6pm to 8pm), surpassing the overall share of total draught lager sales in those same timeframes. Through strategies like bookending and zebra striping, customers are consciously shaping their drinking habits. This trend presents an opportunity for low and no-alcohol options to extend customer visits, drive lunchtime occasions and potentially counteract the earlier quiet times that pubs and bars are experiencing. These 'low & no hours' can effectively draw customers into venues while also encouraging them to linger longer.



THE MODERATION OCCASION IS IMPROVING THE HOSPITALITY EXPERIENCE

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Why are we currently moderating our alcohol consumption on specific social occasions? For most people the reasons are the same as why they are moderating in the first place, that is that they are aiming to protect their health, avoid hangovers, stay in control, and feel better the next day. Others mention driving responsibilities, cost concerns, social pressure, or medical advice as key reasons. Some are choosing moderation to lose weight, set a good example, or because they no longer enjoy alcohol as much. Many also highlight a shift in lifestyle or personal priorities, such as parenting, religious beliefs, or wanting to be more mindful and present during events.

61% say that moderating doesn't stop them going out as much as they would do normally

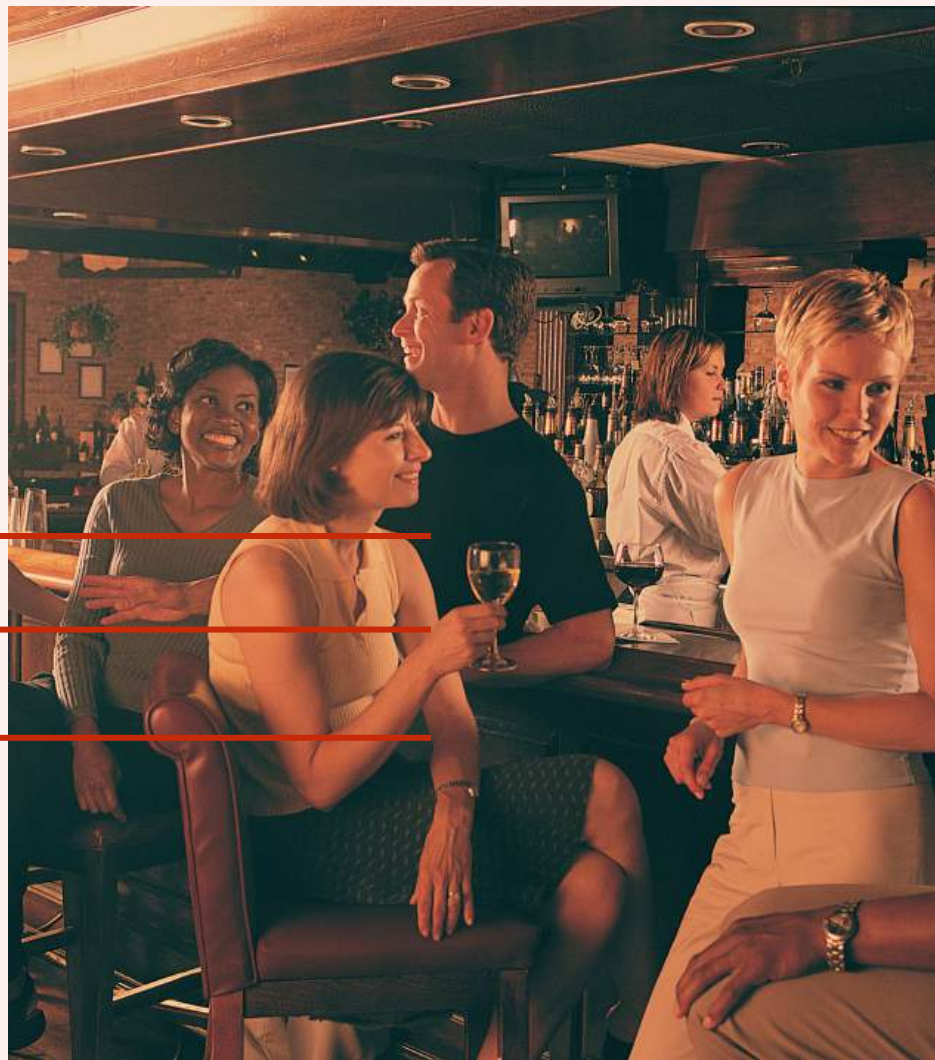
12% actually say that moderation makes them go out more often!

Since they've started moderating, 35% consumers say that their social experiences have IMPROVED as a whole

35%

THE SOCIAL ENABLER

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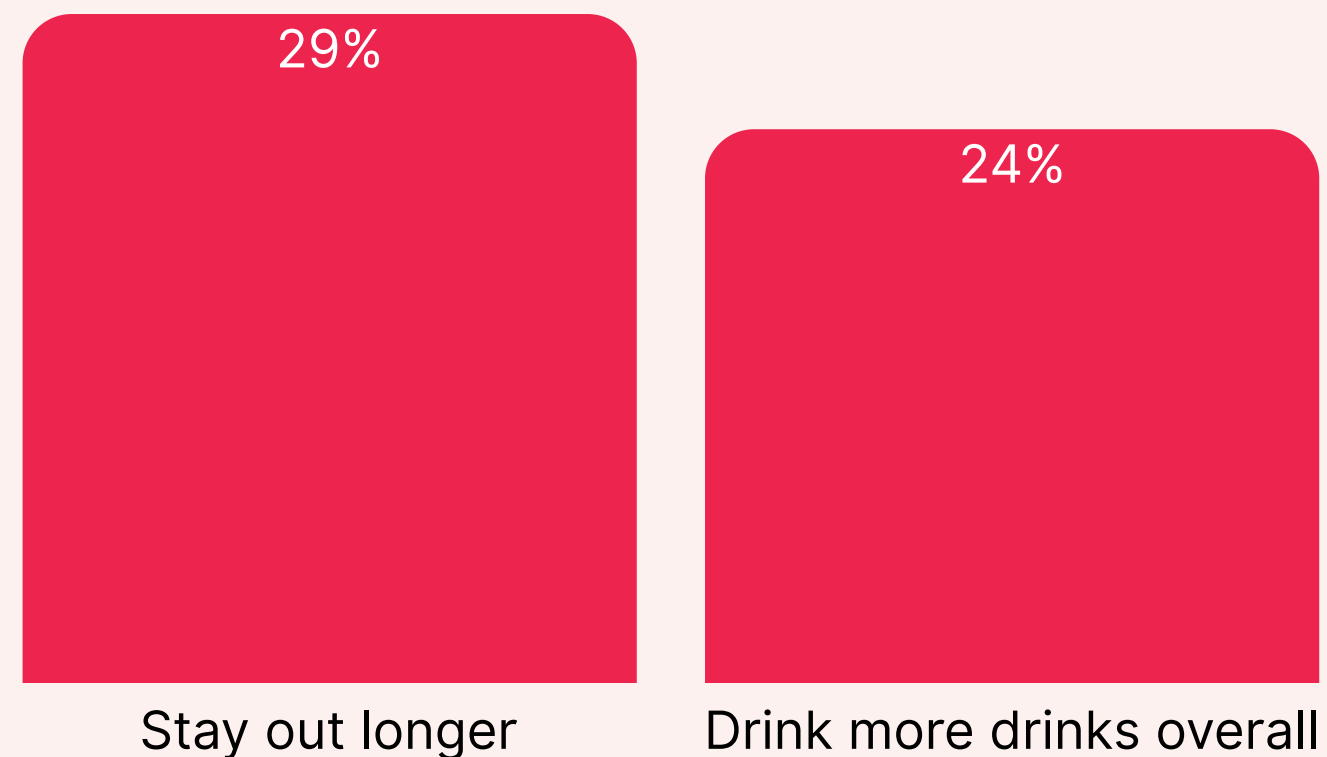


Moderation isn't a constraint; it's an enabler for better social experiences. Consumers feel more in control, spend more on food, and are more likely to prolong outings when drinking low & no. This insight turns the assumption that alcohol is essential to nightlife on its head. It shows that low & no can drive more engaging, profitable experiences for both consumers and venues. It's time for hospitality to view moderation not as a compromise but as a commercial opportunity.

MODERATION OCCASIONS CAN BE GOOD FOR BUSINESS

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Choosing low and no-alcohol options on a night out isn't about cutting the fun short — it's often the opposite. For many, swapping in a non-alcoholic drink means they stay out longer, enjoy more drinks overall, and crucially, feel more in control of their alcohol intake. While some drinkers maintain their usual alcohol consumption, a growing number are finding balance by mixing in low & no options without compromising the experience. Over half say they enjoy the night just as much, proving that moderation doesn't mean missing out. Far from being a buzzkill, low & no is emerging as a smart companion to socialising: helping people pace themselves, stay longer, and still be part of the moment.



WHEN I DRINK LOW & NO ALCOHOL VERSIONS OF ALCOHOLIC DRINKS I....





Lucky Saint's 'free pint' campaign.

Lucky Saint delivered an innovative free pint initiative this Dry January, supporting hospitality venues across the UK with our 'Thou Shalt Go To The Pub' campaign. The drive to get people to visit pubs during the traditionally quiet month of January saw us offer up 100,000 free pints of Lucky Saint across 15 pub operators' sites.

A campaign redemption rate of 32% outshone the industry benchmark of 9% by 23 percentage points. More importantly, our research found that **for every free pint served we delivered an incremental £16 revenue** in venue.

85% of people redeeming their free pint voucher brought at least one other person with them to the pub, contributing to this incremental spend. This was backed up by the finding that two in three of those claiming their free pint bought additional food or drink while at the pub.

We are really proud of our ability to unite hospitality at a challenging time of year and introduce new consumers to the Lucky Saint brand, while driving this incremental value.



LOU POLLITT
CATEGORY & INSIGHTS DIRECTOR
LUCKY SAINT

MODERATORS ARE LIKELY TO INDULGE IN OTHER WAYS

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43%

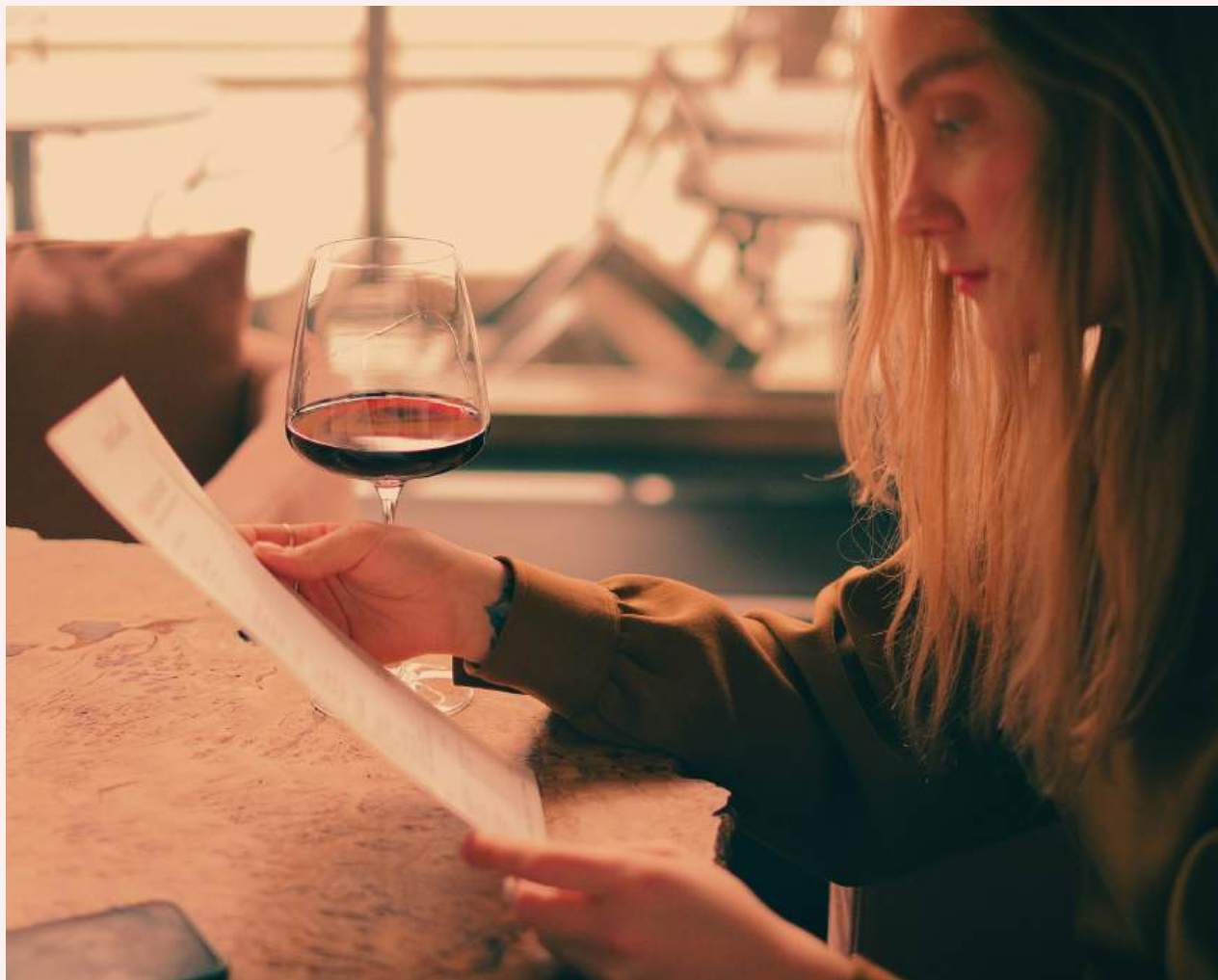
are more likely to 'indulge' in other ways if they are not drinking alcohol on a visit to a pub, bar or restaurant, for example by spending more on food, ordering a dessert, etc.

There is still opportunity for venues to maximise spend, even if it isn't coming from alcohol.



AS THE LOW & NO CATEGORY GROWS, CONSUMERS ARE BECOMING MORE DEMANDING

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37%

of UK adults have left an on-trade venue early or been left disappointed as a result of poor low & no options available in the last 3 months

An increase from 31% in 2024

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MAKING HEALTHY CHOICES

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HEALTH IS A MAJOR INFLUENCE BUT CONFUSION EXISTS

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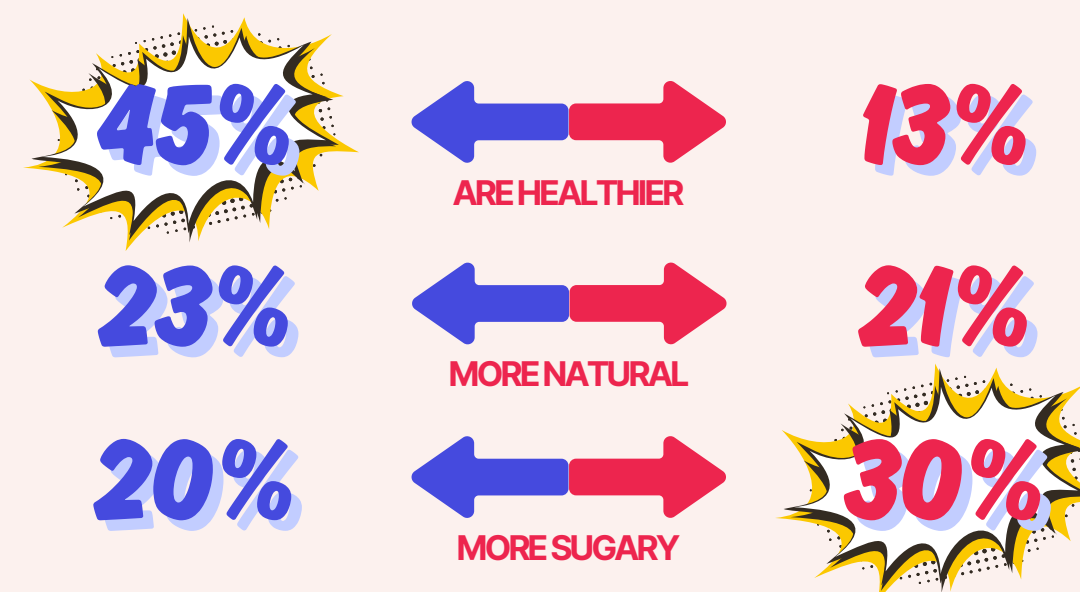
71%

of UK adults say that health influences the drinks they choose to drink in pubs, bars and restaurants to some extent. (90% for 25-34s and 52% for 55+)

Consumer opinion on low & no alcoholic drinks compared to traditional soft drinks, for the following...

Low & no alcoholic drinks

Traditional soft drinks



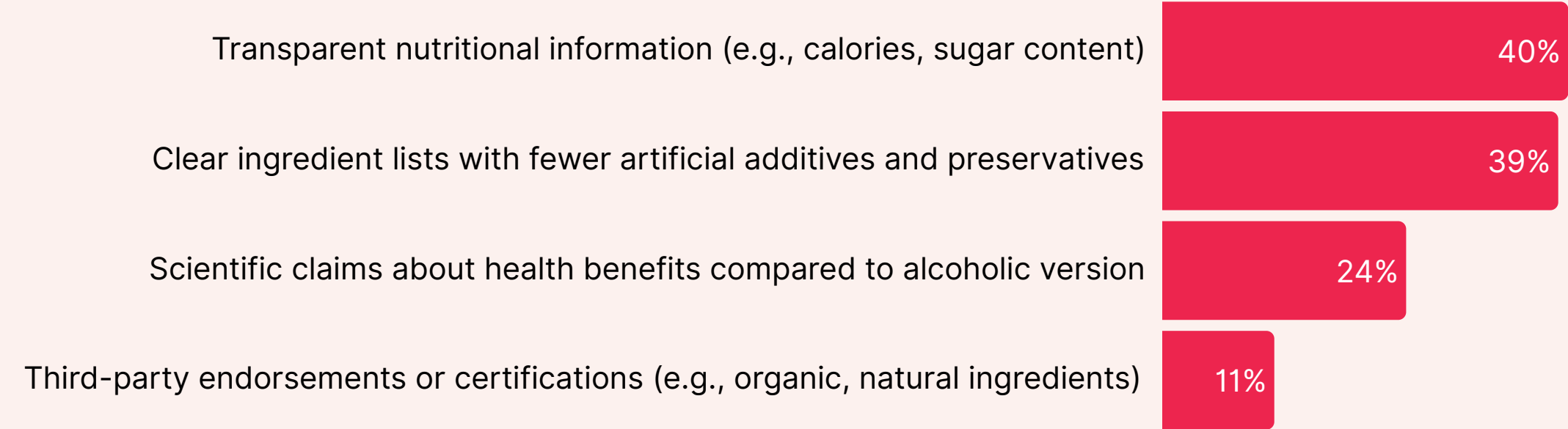
Perceptions are that low & no alcoholic drinks are healthier than traditional soft drinks, but there is confusion as perhaps to why – with most consumers thinking that they are as processed as traditional soft drinks. 'Less sugary' would appear to be a factor that is influencing this overall perception. The confusion potentially arises from a lack of knowledge about these drinks and an incomplete understanding of the benefits of low & no, as well as the wide range of product types in the category.

HEALTH INFORMATION AND TRANSPARENCY IS WANTED

65%

of UK adults say they look at the health information when choosing alcohol-free drinks

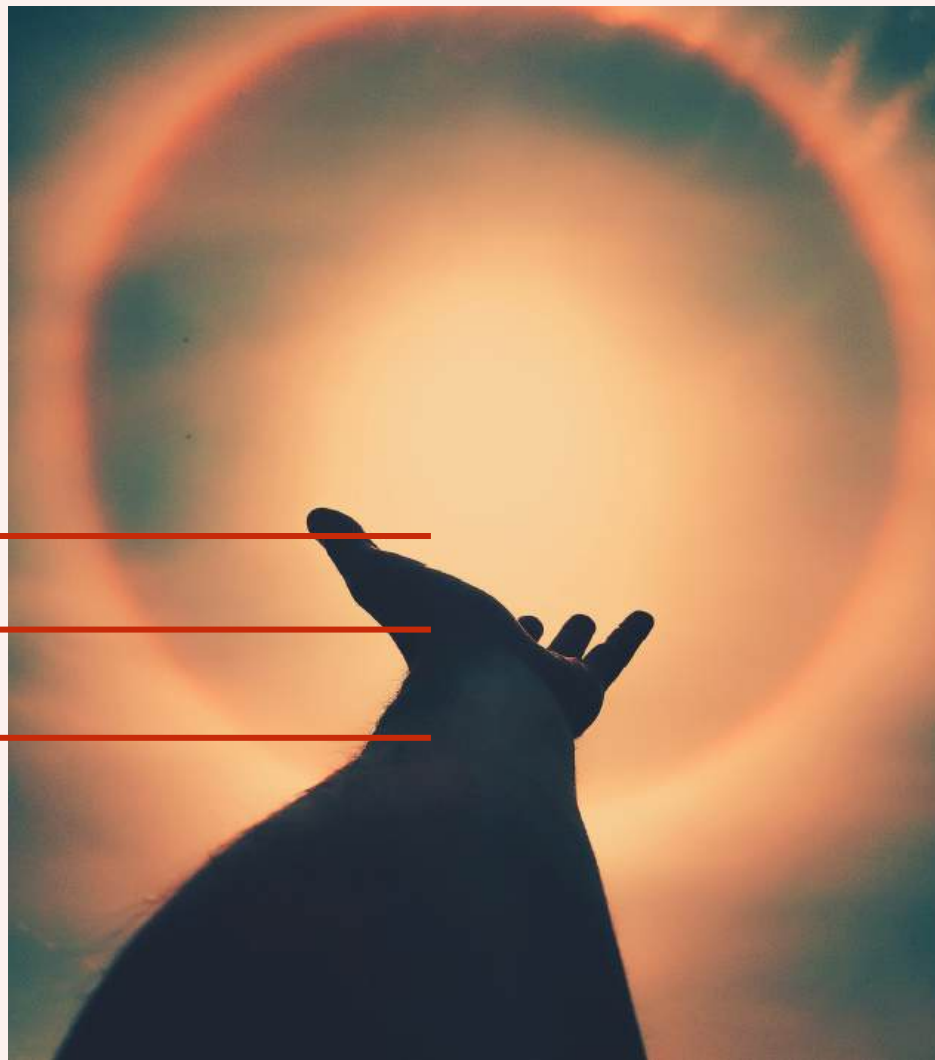
The following information would help consumers to be more confident in choosing low & no alcoholic drinks for health reasons.



A HEALTH HALO

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The low & no category enjoys somewhat of a 'health halo', but it's fragile. Consumers perceive these drinks as healthier but lack specific knowledge, which means transparency and education are critical. Brands must address the gap by offering clear, credible health claims, nutritional labels, and natural ingredient profiles. As scrutiny of ingredients intensifies, trust and transparency will become key differentiators.



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THE EVOLVING ROLE OF ALCOHOL IN SOCIALISING

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WE ARE SOCIAL ANIMALS

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66%

say that the main reason they go out to a pub, bar or restaurant is to socialise with friends/family/colleagues, etc.

2nd



10%

To experience an atmosphere you can't replicate at home

3rd



8%

To meet new people

Drinking alcohol is the 4th main reason' that people go out to pubs, bars and restaurants (6%), signalling that it has an impact, but that this impact pales in comparison to the need for social interactions. It's this evolution of social interaction, which for many does not have alcohol at its core, which is fuelling the demand for low & no options, enabling customers to moderate at their pace whilst still enjoying the thrill of a night out.

ALCOHOL, OF COURSE,
PLAYS A ROLE IN SOCIAL
OCCASIONS BUT IT'S NOT
WHAT IT'S ALL ABOUT

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54%

say that alcohol is **not** a factor in
bringing them joy when going
out to a pub, bar or restaurant

37% say alcohol improves the 'joy' of going out, with 9% saying it worsens their 'joy'.



LOW & NO CAN ENHANCE THE SOCIAL EXPERIENCE

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The joy of going out is anchored in connection, not consumption. This decoupling of alcohol from enjoyment repositions low & no drinks as experience enablers rather than substitutes. Consumers are seeking products that allow them to engage fully, stay present and connect more deeply. Low & no products are increasingly being chosen not because they lack alcohol, but because they add value to social interactions in new ways.

36%

of UK adults say that having a good choice of low & no alcohol options available enhances the social experience when they visit pubs, bars and restaurants

34%

of UK adults say that drinking low & no on nights out improves the quality of their interactions and/or allows them to stay more present in social settings

“

2022 we were converting one in every 15 cocktails, 2023 when we launched our zero-proof cocktail mirror menu we shifted that to one in 12, in 2024 we benchmarked one in 8 and in 2025 we are now serving one in every 6 cocktails as a non-alcoholic option. This transition is also mirrored in our back bar, where we have an excellent selection of products that the bartenders can use to create flavours and enhance the guest experience.

We are successful with our no & low strategy because we focus on adults’ approach to drinking, we take our famous signature cocktails locally and internationally, for example ‘Haka’ and ‘Sea of Clouds’, and we zero proof them so they are authentic copies of the alcoholic versions working with zero proof spirits embracing the same flavour and look of the cocktails which brings fun in to play so our guests feel more comfortable with what they are getting because they know the alcoholic serve. You also feel like you have a nice good-looking cocktail in your hand which the bartender has put a lot of effort into making. Since the proven success with our signatures, we are now using this approach to margaritas, sours, spritz, collins and daiquiris.

We have a 13-16% uplift in non-alcohol sales year on year. One of the latest hottest trends is non-alcoholic wines and sodas. We are also very proud of our ‘Za’atar Paloma’ zero proof.



WENDY HOPKINS
DIRECTOR OF BEVERAGE UK & INTERNATIONAL
TAO GROUP HOSPITALITY

LOW+NO /2025

LOW & NO CONSUMPTION BEHAVIOURS IN THE OFF AND ON TRADE

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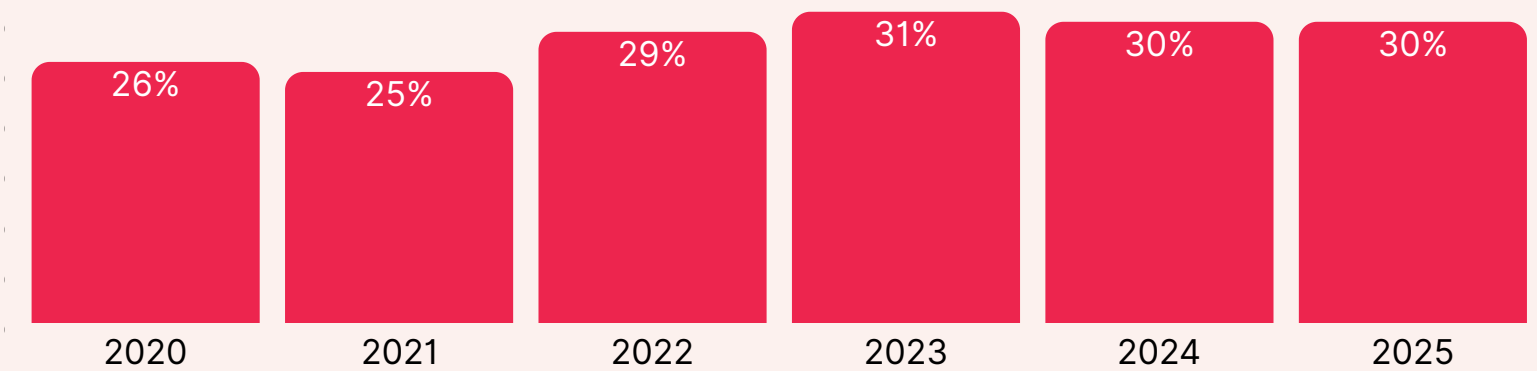


A GROWING NUMBER OF VISITS TO PUBS, BARS AND RESTAURANTS ARE ALCOHOL-FREE

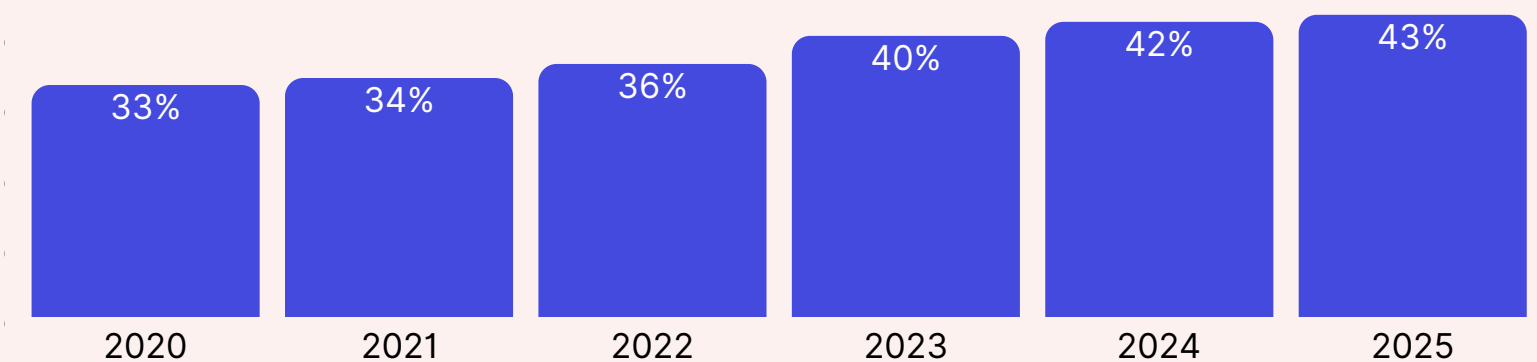
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● % of visits to pubs/bars that are alcohol-free



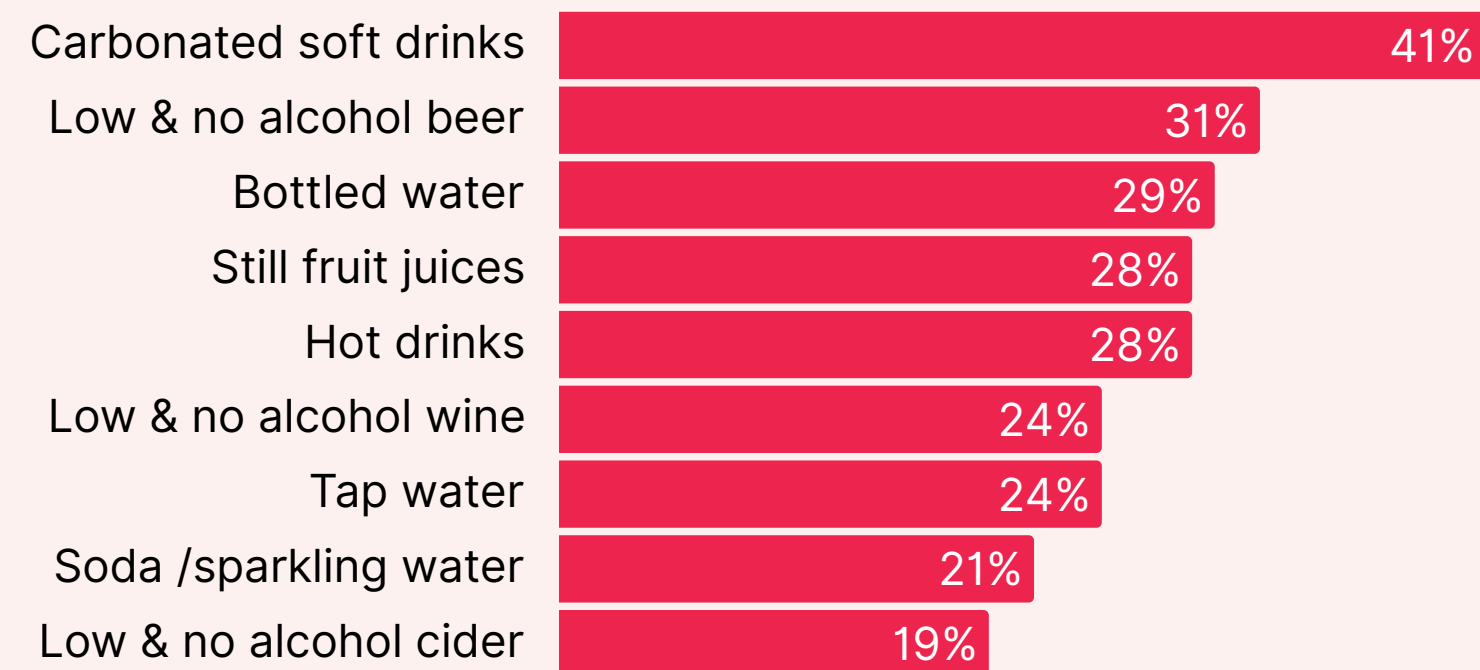
● % of visits to restaurants that are alcohol-free



CONSUMPTION CONSIDERATION FOR LOW & NO IN THE ON TRADE

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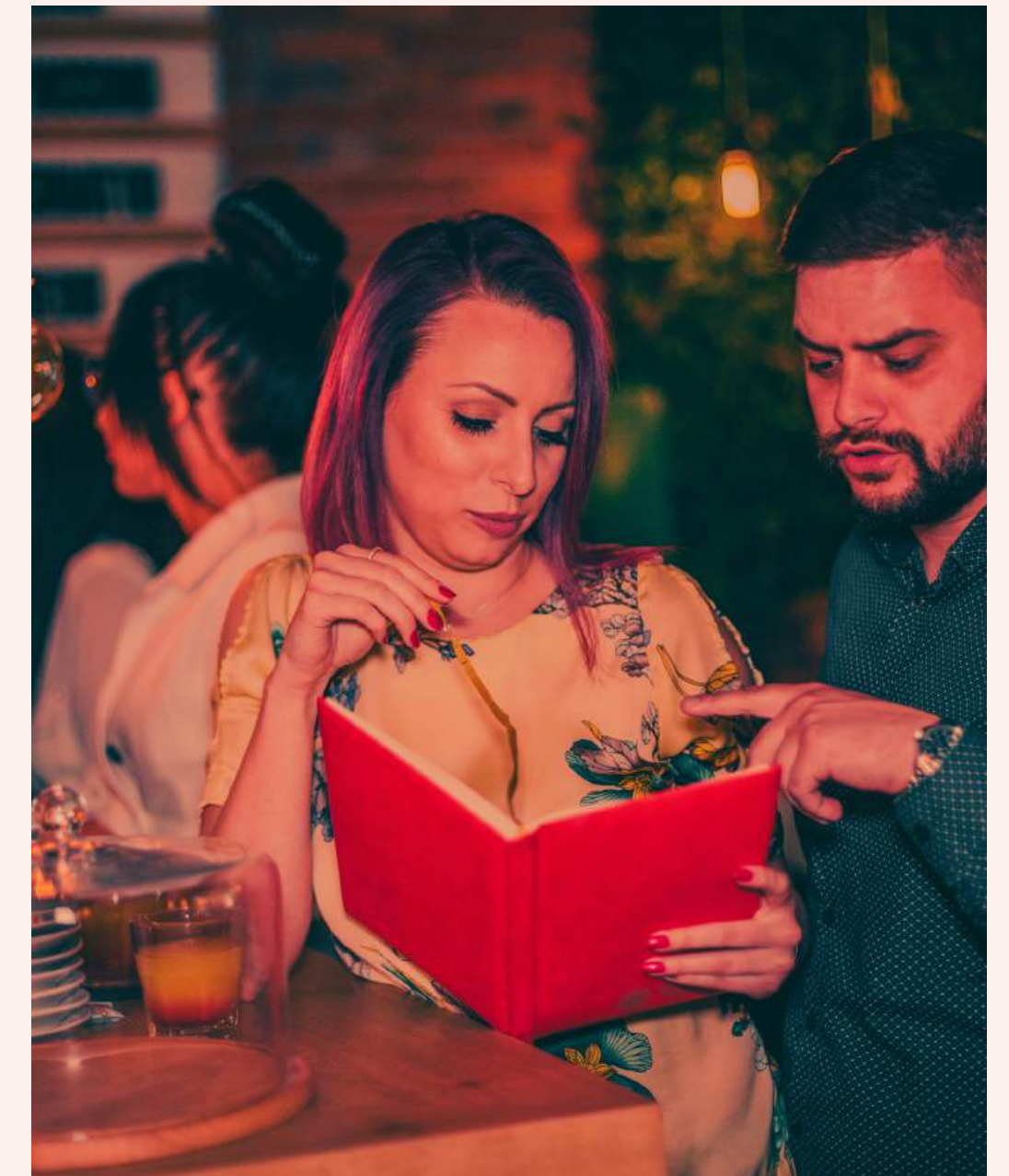
Top 10 categories that consumers would choose to order in a pub, bar or restaurant when not drinking alcohol are:



Those who would choose a low & no beer has increased to 31% from 23% last year and up from 9% just 5 years ago! It's now the 2nd most popular choice when customer s aren't drinking alcohol (7th in 2024).

24% of customers still default to tap water in venue. (23% in 2024) - down only very slightly from 28% in 2020. **This remains a £800m missed opportunity for the trade.**

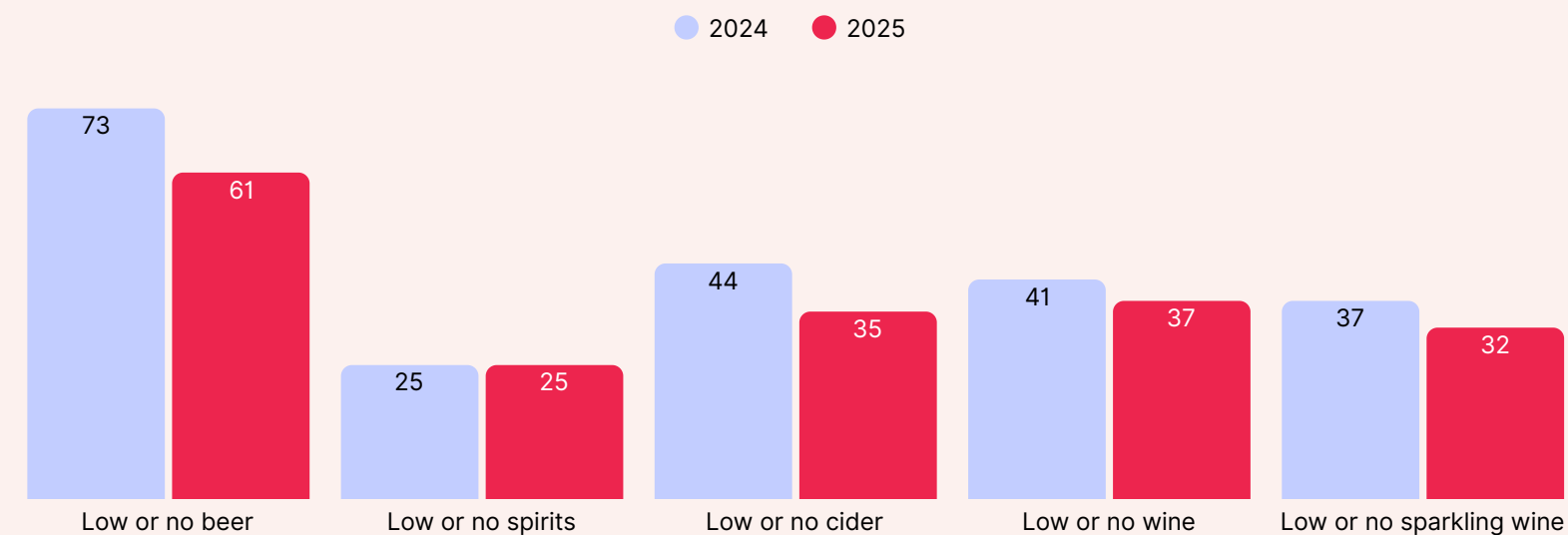
Low & no is not only gaining share but it's entering the consideration set ahead of more traditional soft drinks. This elevation in perceived desirability signals growing consumer familiarity and confidence. Venues that want to capture spend from moderating consumers need to ensure visibility and variety in low & no options. There's a window now to convert occasional curiosity into habitual preference. This is already happening in the beer category and the opportunity is there for the other low & no segments.



THE LOW & NO CUSTOMER IS BECOMING MORE DEMANDING

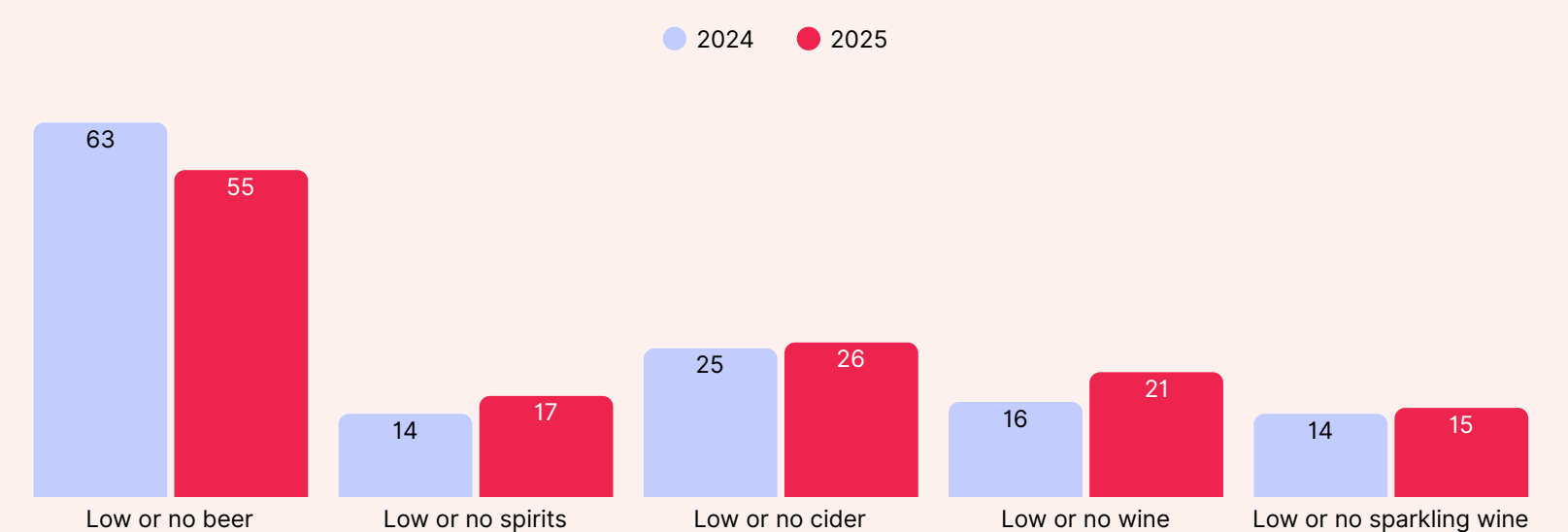
Low or no beer is the only category to see significant decline in 'ease of finding' across both off and on trade. This could be due to an increase in customers looking for specific brands and/or new products (i.e. a more discerning customer with an increasing demand of range/products they are seeking out), as well as increasing demand for draught options which aren't being satisfied. As demand matures, expectations rise. Consumers are no longer impressed simply by availability - they want variety, quality, and discovery. A decline in "ease of finding" signals that the bar has been raised. Retailers and venues need to treat low & no not as fringe products but as core SKUs that deserve strategic placement, promotion, and range rotation. These findings may also point to why we've seen an increase in the percentage of who have left an on-trade venue early or been left disappointed as a result of poor low & no options available in the last 3 months (up from 31% to 37%).

Is it becoming easier for customers to find low & no in supermarkets?



Customer satisfaction with 'ease of finding/accessing' low and no
(net rating: % 'very easy/easy' minus % 'very difficult/difficult')

Is it becoming easier for customers to find low & no in pubs, bars and restaurants?



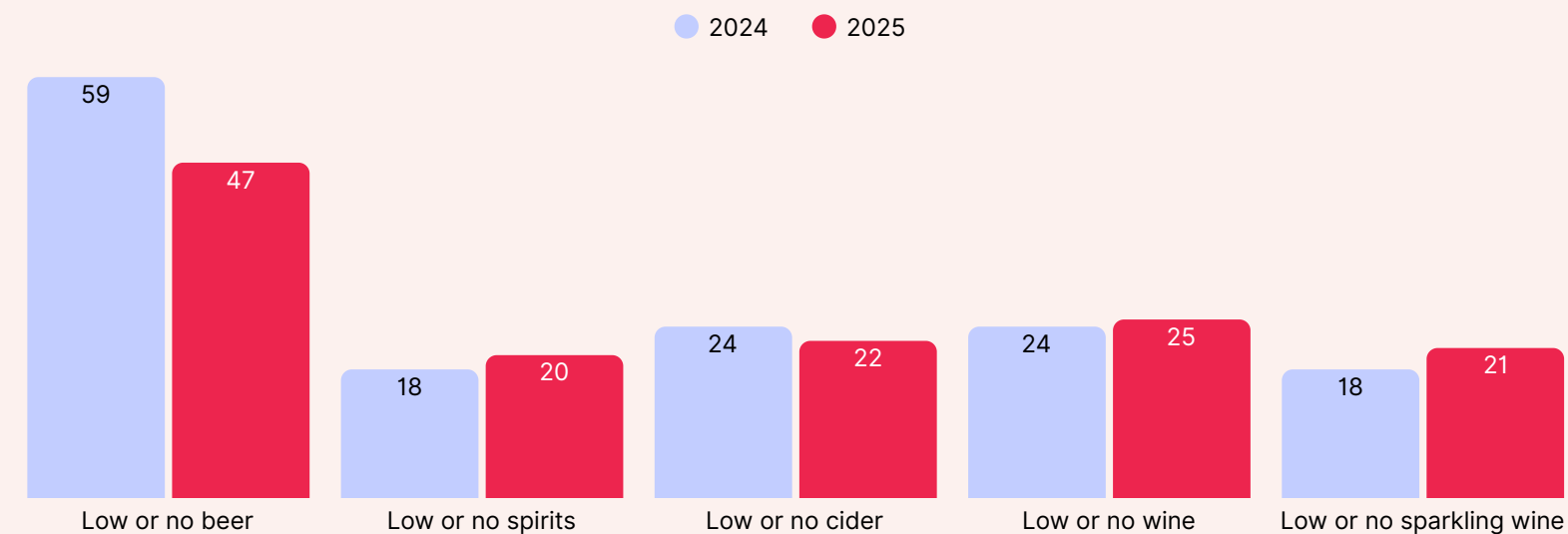
Customer satisfaction with 'ease of finding/accessing' low and no
(net rating: % 'very easy/easy' minus % 'very difficult/difficult')

A GOOD RANGE OF LOW & NO IS NO LONGER GOOD ENOUGH

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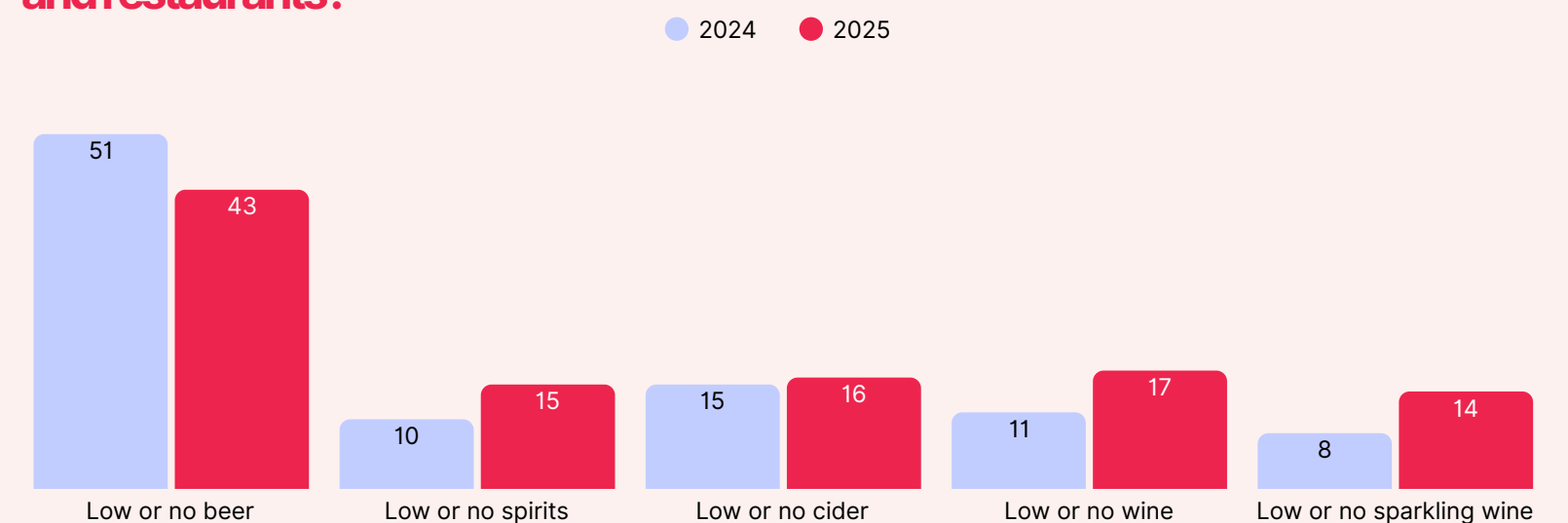
Although in previous years we have seen continued improvements in visibility and range satisfaction from consumers, this years' data suggests that, despite some improvement for low and no spirits and wines, expectations are now not being met. With regards to range, it's no longer sufficient to offer just one or two token options, customers now expect parity in range between alcoholic and non-alcoholic categories. The sophistication of the low & no drinker demands breadth, depth, and quality in choice - especially in pubs and bars. This is an urgent call for operators to expand and curate their offerings in line with rising expectations and consumer standards.

Is the range of low & no improving in the eyes of customers in supermarkets?



Customer satisfaction with choice/range of low & no
(net rating – % 'very good/good' minus % 'very poor/poor'):

Is the range of low & no improving in the eyes of customers in pubs, bars and restaurants?



Customer satisfaction with choice/range of low & no
(net rating – % 'very good/good' minus % 'very poor/poor'):

ALCOHOL FREE BEER ON DRAUGHT REMAINS A KEY SELLING POINT

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35%

Say it's important for pubs and bars to have at least one draught alcohol-free beer available (was 36% in 2024).

With research showing that customers spend 22.4 seconds looking at the bar vs 6.4 seconds looking at the fridge^(†), the availability of alcohol-free beer on draught will likely provide a halo effect for 'visibility' of the low & no category in general.



“

It's clear that our guests now expect a wider variety of non-alcoholic drinks, and these expectations are growing year after year. This shift presents a fantastic opportunity for operators, but it also comes with its own set of challenges. At Mitchells & Butlers, our strategy revolves around growing our non-alcoholic offerings at the right pace, in the right fascia, and with the right products. Our broad range of occasions, geography and guest demographics means that we require a tailored approach for each fascia.

Innovation in the mixed drinks non-alcoholic space is a priority for several areas of our estate. Our goal is to offer guests exciting non-alcoholic serves that aren't easily replicated at home. Additionally, non-alcoholic variants from established brands provide our guests with the quality reassurance needed to drive trial and growth within this segment.



ROB ZIELSKI, CATEGORY MANAGER
NON ALC & SPIRITS
MITCHELLS & BUTLERS

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TOP 10 MODERATION TRENDS FOR 2026

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TOP 10 KEY TAKEOUTS

- 1. Moderation is mainstream.** 76% of UK adults are actively moderating. This isn't a niche trend, it's a new norm, especially among under 35s who are choosing flexibility and control over excess.
- 2. Drinking less, socialising more.** Lower alcohol consumption isn't keeping people at home. In fact, many people report improved social lives due to low & no options.
- 3. Low & no = big growth.** There is significant growth in low & no products, particularly among younger drinkers, driven by health and social acceptance.
- 4. Quality and visibility now matter most.** One token option is no longer good enough. Consumers expect a quality range of low & no options that are easily accessible and comparable to alcoholic drinks.
- 5. Social acceptance is evolving.** It's becoming more socially acceptable to say no to alcohol, but peer pressure still exists. Operators can lead cultural change by normalising low & no in group settings.
- 6. Low & no can boost footfall, dwell time & spend.** Moderators often stay out longer, and bring others with them. Over 40% say they indulge more in food when not drinking.
- 7. Operators missing the moment.** Nearly 4 in 10 have felt disappointed or left early, because of poor low & no options in venues. That figure is rising as consumers come to expect more from the category. Tap water is still the fallback for too many, representing a major revenue loss.
- 8. On-Trade needs to catch up.** Retail is outpacing hospitality for low & no range and visibility. Satisfaction with range in pubs and bars is declining. Consumers want breadth, depth, and brands they trust.
- 9. Bookending and zebra striping are shaping behaviour.** Customers are strategically using low & no drinks throughout their night, opening up opportunities across all dayparts, especially quieter early-evening slots.
- 10. Moderation is good for business.** Embracing moderation can enhance business revenue, as low & no products elevate the hospitality experience.

CALLS TO ACTION FOR OPERATORS



- 1. Treat low & no as a core category.** Stop hiding alcohol-free options in the bottom corner of the menu. Integrate them into your main drinks list with the same care as beers, wines, and cocktails.
- 2. Stock a broad, balanced range.** Offer more than one token beer. Think across formats (draught, bottled, canned) and categories (mid-strength, low & no). Aim for parity in variety and appeal.
- 3. Put low & no on draught.** A third of consumers want at least one draught alcohol-free beer. Visibility matters - having low & no on tap signals credibility and makes moderation feel mainstream.
- 4. Empower and train staff to recommend.** Train your teams to confidently recommend low & no drinks. Build in-upselling prompts just as you would for food pairings or high-margin cocktails.
- 5. Promote Low & No at the right moments.** Activate low & no during quieter trading periods, like early evenings, midweek or lunchtimes, and link it to moderation trends like “zebra striping” and “bookending.” These are prime opportunities to increase dwell time.
- 6. Host low & no-friendly events.** Create inclusive experiences such as mindful socials, tasting nights, or dry brunches. Don’t just include non-drinkers, celebrate them. It’s an untapped audience hungry for spaces where moderation is normal.
- 7. Make health-transparency easy.** Consumers perceive low & no as “healthier” but want more clarity. Add simple health cues on menus (e.g. sugar content, calories, natural ingredients) to build trust and confidence.
- 8. Use language that elevates, not apologises.** Describe low & no products with the same flavour-forward, premium language as alcoholic drinks. Position them as desirable choices, not second-best.
- 9. Create social ‘shareability’.** Help guests feel proud of their low & no choice. Invest in stylish glassware, garnishes, and branding. These drinks should be photogenic and social media-worthy.
- 10. Track and optimise performance.** Monitor what sells, when, and to whom. Treat low & no as you would any growth category - test, learn, rotate, and promote based on data. This isn’t a passing phase, it’s an evolving market.

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**DRINKING
DIFFERENTLY /2025**

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