



# RAISING THE BAR 2026

How the UK On-Trade is currently meeting the demand for alcohol-free.

Everleaf®   
NON-ALCOHOLIC APERITIFS

**KAM**

# RAISING THE BAR



Over the past decade, the UK's drinking culture has undergone a fundamental shift. What was once a seasonal behaviour, driven by moments like "Dry January", has evolved into a year-round expectation for having credible alcohol-free options.

In 2024, our research highlighted a gap between rising consumer demand and the industry's ability to meet it. While interest in alcohol-free drinks was growing rapidly, availability, visibility and execution remained inconsistent. Two years on, the picture has changed significantly.

New data from our 2026 audit shows that alcohol-free is now firmly established across the UK on-trade. Almost all venues offer alcohol-free options beyond traditional soft drinks for 12 months of the year. This marks a clear departure from the idea of moderation as a seasonal trend.

Venues are also expanding their range beyond bottled beer, reflecting the growing importance of categories such as alcohol-free spirits, cocktails and cider. This diversification signals an expanding market that is beginning to respond to evolving consumer expectations.

However, while availability has improved, the question remains: is the industry truly keeping up with what consumers now expect from alcohol-free?

This report, conducted by KAM in partnership with Everleaf, explores how the UK on-trade has progressed over the past two years, and where the next opportunities lie to deliver a more compelling, consistent and high-quality alcohol-free experience. It is based on an in-depth audit across 100 venues in London, representing 4,400 UK pubs, bars and restaurants, during February 2026.



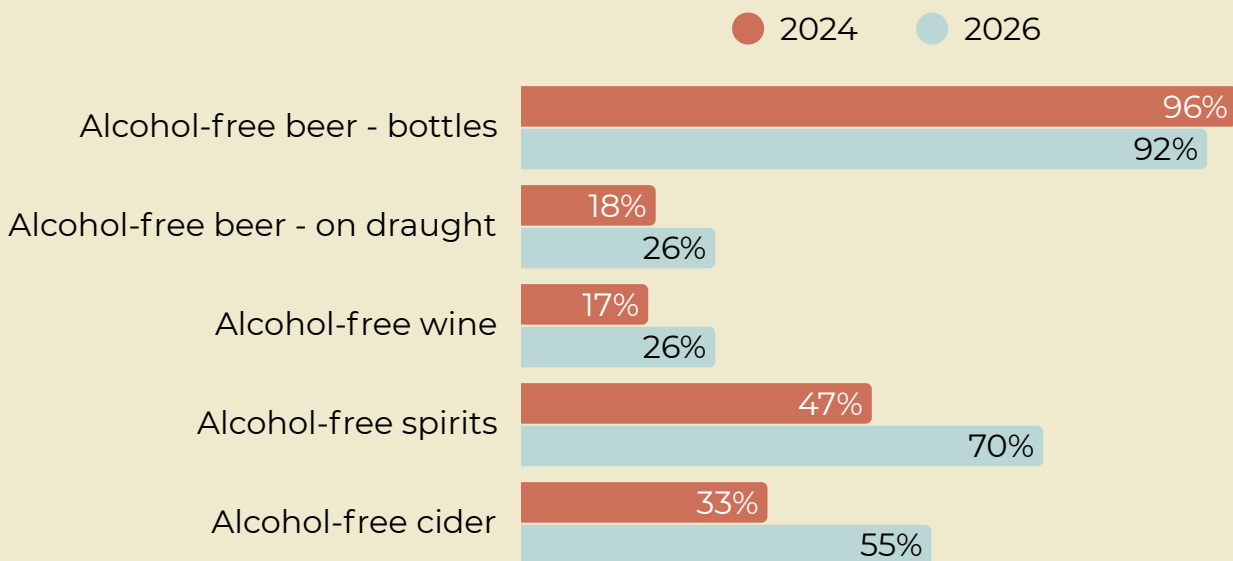
# As alcohol-free demand grows, venues are (finally!) expanding their offer beyond alcohol-free beer

Consumers are increasingly looking for more than just a single alcohol-free option when out socialising. With 1-in-3 visits to hospitality venues not featuring alcohol\*, expectations around choice and quality of alcohol-free alternatives are evolving rapidly.

In 2024, alcohol-free beer dominated the category, with limited availability of other alternatives. Two years on, the picture has shifted significantly, with venues expanding their offer across a wider range of alcohol-free drinks in order to meet a growing demand for other options.



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



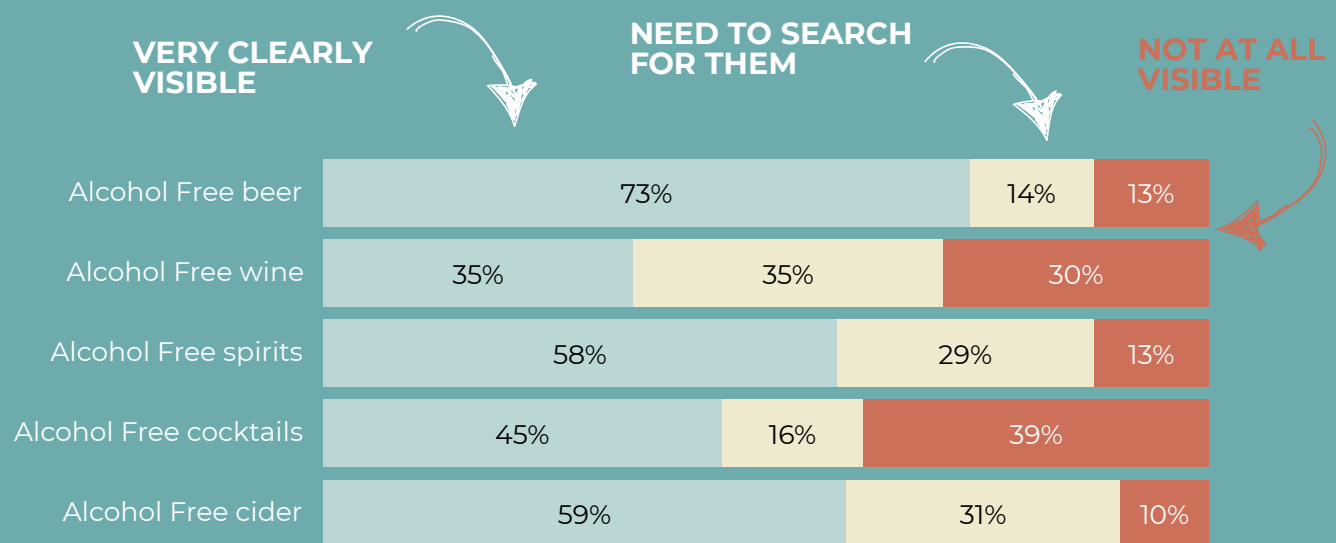
Source: KAM x Everleaf - Raising the Bar 2026. \*KAM x Lucky Saint - Low + No 2025

# Alcohol-free drinks are now more visible at the bar, but venues still fail to give them equal prominence

In 2024, alcohol-free drinks were often difficult to spot, with many customers needing to actively search for them or missing them altogether. Two years on, visibility has improved significantly across all categories. Alcohol-free beer has seen the most dramatic shift, with the proportion of venues where it is “**very clearly visible**” rising from **39% to 73%**. Alcohol-free spirits have also made strong progress, reflecting their growing importance on the back bar. At the same time, the number of venues where customers have to search for alcohol-free options has fallen sharply, and fewer venues now fail to display them at all. Great news for customers wanting alcohol-free!

However, visibility remains inconsistent with many venues still not giving alcohol-free drinks enough prominence on the bar, particularly in categories such as wine and cocktails where visibility remains lower.

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



Source: KAM x Everleaf - Raising the Bar 2024.

# Menus are evolving, but lacking consistency

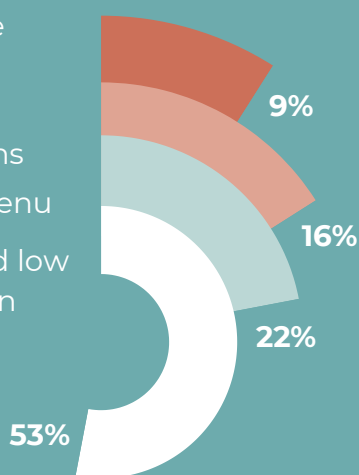


More venues are now giving alcohol-free drinks a dedicated space on the menu, with specific sections for “low and no” growing across all categories. Alcohol-free wine and spirits in particular have seen strong gains in menu inclusion, while alcohol-free cocktails are now well established.

However, many venues still treat alcohol-free as secondary. A significant proportion of options, particularly spirits, remain unlisted, and placement is often inconsistent, split between dedicated sections, mixed listings, or separate menus. This lack of clarity makes it harder for customers to find and choose alcohol-free options, limiting the impact of improvements that have been made.

## Where on the menu do alcohol-free variants feature?

- On a separate menu
- Mixed in with alcohol options
- Not on the menu
- In a dedicated low and no section



25%

Of venues did not include alcohol-free beer on the menu

19%

Of venues did not include alcohol-free wine on the menu

23%

Of venues did not include alcohol-free spirits on the menu

22%

Of venues did not include alcohol-free cider on the menu

Source: KAM x Everleaf - Raising the Bar 2026.

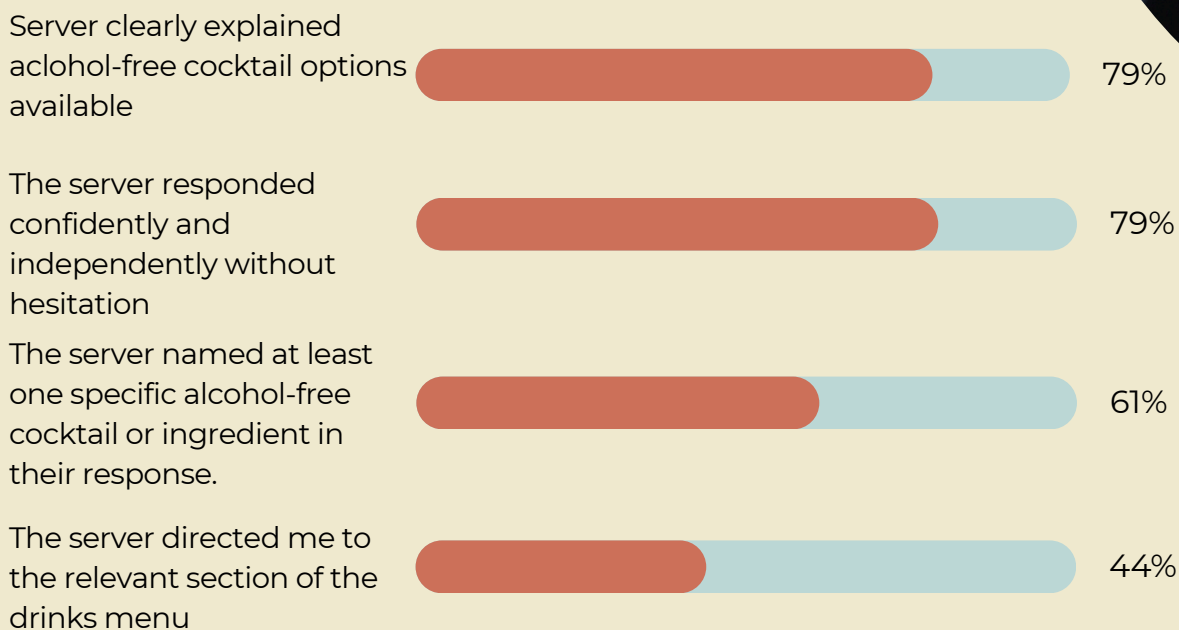
# Staff confidence when serving alcohol-free is on the rise

Staff knowledge and confidence in the alcohol-free is continuing to rise, reflecting growing familiarity with the category. The proportion of staff who feel “very confident” in their knowledge has increased from **70% in 2024 to 82% in 2026**, and most servers respond clearly and without hesitation when asked about what alcohol-free options were available.

This suggests that alcohol-free is becoming part of everyday service, rather than an exception. As the category grows, staff are becoming more comfortable discussing options and engaging with customers.



## % who agreed or strongly agreed that their server met the following criteria



Source: KAM x Everleaf - Raising the Bar 2026

# Seen, Said, Served - where guest experience is lacking

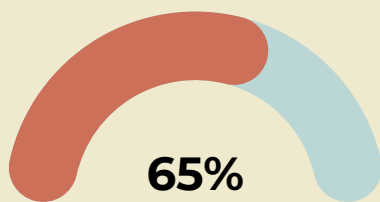


While staff appear confident, the quality of service of alcohol-free drinks remains inconsistent. Although many servers can explain what alcohol-free options are available, fewer are able to name a specific alcohol-free drink, brand or ingredient, and only a minority actively direct customers to the relevant section of the menu.

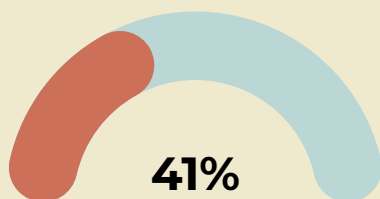
When it comes to preparation, bartenders are generally comfortable serving alcohol-free drinks, but opportunities to elevate the experience are often missed. For example, relatively few offer the guest a choice of alcohol-free spirits or mixers, limiting the sense of occasion and personalisation.

Overall, while the basics are being delivered, many venues are not yet providing the confident, engaging and premium experience that customers increasingly expect from alcohol-free.

## % of guests who agreed or strongly agreed that their alcohol-free drink experience met the following criteria:



The alcohol-free drink was served in appropriate and clean glassware.



Server offered a choice of alcohol-free gins and/or mixers

“Customers often ask for alcohol-free draft beer which we now have. We also get requests for other non alcoholic drinks that we don't have that people expect, like alcohol free spirits, and we get asked about alcohol free wine sometimes.”

Source: KAM x Everleaf - Raising the Bar 2026

# Digital visibility of alcohol-free options is improving but remains underutilised



As consumers increasingly research venues before visiting, digital visibility of alcohol-free options is becoming just as important as what's available at the bar.

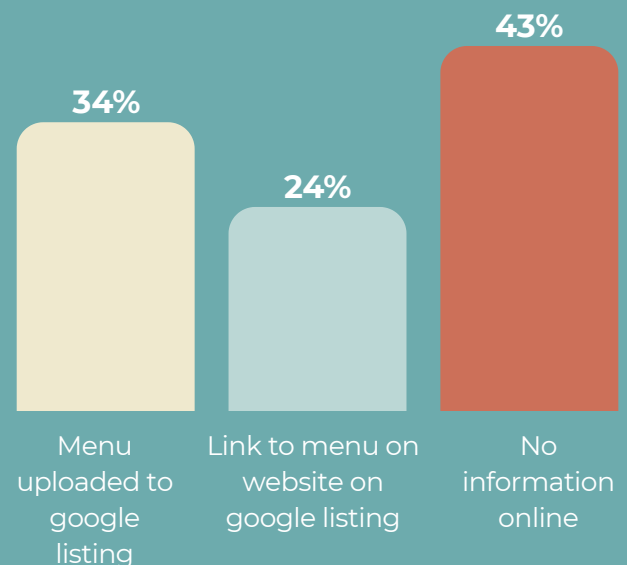
Encouragingly, more venues are now listing alcohol-free options online. For example, availability of alcohol-free wines on websites has reached **65% compared with 50% in 2024**, while beer listings have also improved, making it easier for customers to plan ahead.

However, digital visibility still lags behind in-venue progress. A significant number of venues still provide little or no information about their alcohol-free offer online, and listings across Google and websites remain inconsistent. As search behaviour evolves, including the growing role of AI in digital discovery, venues that clearly communicate their alcohol-free range online are more likely to attract and convert customers before they walk through the door..

## 31%

Of guests use internet searches to help them find and/or choose a pub, bar or restaurant\*

### Proportion of venues with alcohol-free drinks available that list them on the following



Source: KAM x Everleaf - Raising the Bar 2026  
\*KAM - Plan to Plate 2025

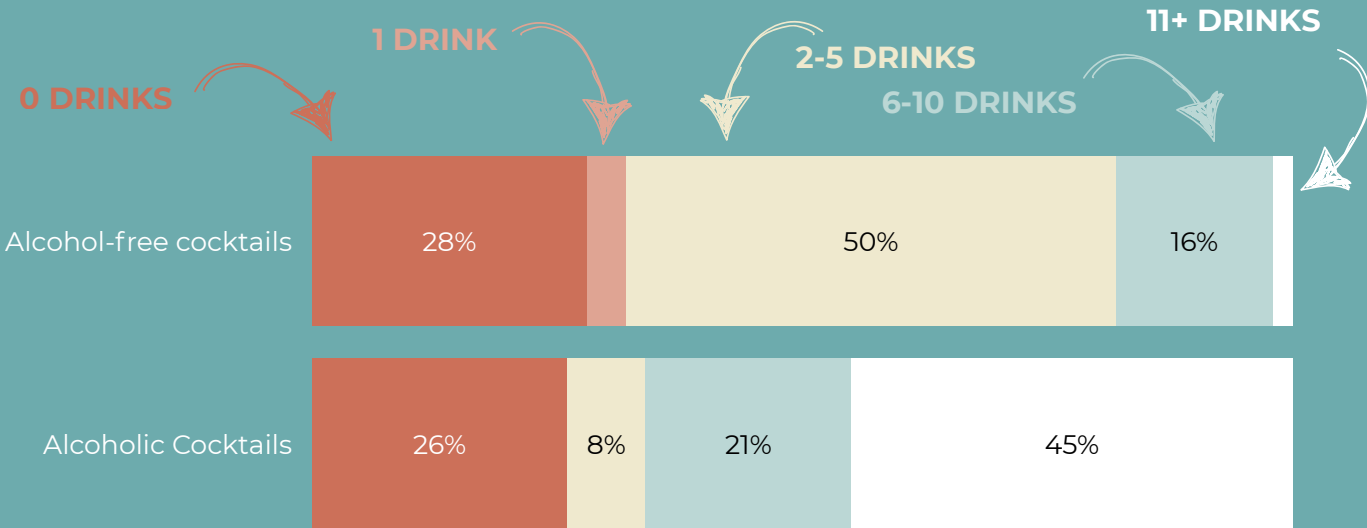
# The Alcohol-Free Spirit Boom



The growth of alcohol-free spirits is now translating into more developed cocktail menus, as venues begin to expand their alcohol-free offer beyond simple serves. The number of alcohol-free cocktails available has increased significantly since 2024. The proportion of venues offering no alcohol-free cocktails has fallen from **46% to 28%**, while those offering **between 6 and 10** options have more than tripled. On average, venues now offer **3.2** alcohol-free cocktails, up from just **1.9** two years ago. This reflects a shift towards more premium, experience-led alcohol-free options, driven by the rise of alcohol-free spirits.

However, a clear gap remains when compared to alcoholic cocktails. Venues still offer, on average, three times as many alcoholic cocktails, with many menus featuring 11 or more options.

## How many non-alcoholic cocktails (with more than two ingredients) are on the menu?



# TOP 5 TIPS



## to raise the bar for alcohol-free drinks

**Recommendations from Dan I'Anson, Commercial & Trade Marketing Director, Everleaf.**



### **Stop hiding the choice**

The data is stark: 40% of operators are still failing to give alcohol-free drinks the prominence they deserve. If a product isn't visible on the back-bar, you're quite literally turning away profit. Give premium AF spirits the same 'stage' and real estate as your lead gin or whisky brands.

### **Fix the menus, or risk losing the sale to water or a soft drink**

Adoption within the trade is improving, but menus are lagging behind. If your AF spirits and cocktails aren't listed explicitly, they simply don't exist to the guest. Don't make your customers go on a treasure hunt for a sophisticated NA drink.

### **Train staff to increase knowledge and sales**

It is a commercial failure that 25% of servers still tell guests there are no AF options when 98% of venues actually have them in stock. This isn't a supply issue; it's a training breakdown. It is up to brands and operators to work closely together to get the liquid into the team's hands so they can talk about flavours and serves with genuine confidence.

### **Own the digital doorstep**

Two-thirds of venues now list their AF spirits online before a guest even sets foot through the door. If your website and Google listing aren't shouting about your sophisticated non-alcoholic range, you are actively driving the mindful drinker straight to your competitor down the street.

### **Move from 'available' to 'as good as anything else on the bar'**

Simple availability is now the baseline; execution is the new battleground. Stop settling for basic AF serves with watery non alc brand extensions. Use high quality non alc products with complexity and flavour, premium glassware, and sophisticated garnishes to deliver the memorable experience that guests now rightly expect. Make sure the serve justifies the price point.



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



# RAISING THE BAR

How the UK On-Trade can continue to develop alongside Alcohol-Free

The 2026 Raising the Bar report confirms that alcohol-free has moved far beyond a seasonal trend. Moderation is now a permanent part of UK drinking culture, with venues responding to sustained consumer demand by making alcohol-free a year-round offering.

Over the past two years, the category has evolved rapidly. Availability has increased significantly, particularly in alcohol-free spirits, while visibility at the bar, menu presence and staff confidence have all improved.

However, while the foundations are in place, the execution remains inconsistent. Many venues are still failing to give alcohol-free drinks equal prominence, both physically and on menus. Digital visibility continues to lag behind, limiting pre-visit discovery, and gaps in staff knowledge mean that customers are not always being guided effectively. In too many cases, alcohol-free options are available, but not fully realised as part of the experience.

The next phase of growth will be defined not by availability, but by quality of execution. As consumer expectations continue to rise, venues that deliver a visible, well-communicated and engaging alcohol-free offer will be best placed to stand out.



Everleaf was founded by a conservation biologist turned bartender who knows the world's plants and how to use them. They make 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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