

DRINKING DIFFERENTLY: LOW+NO 2026



KAM In partnership with:
LUCKY SAINT

FOREWORD



LUKE BOASE, FOUNDER, LUCKY SAINT

Lucky Saint was founded as a dedicated alcohol-free only brand, with the vision to produce a beer and a brand that people are proud to drink.

Ten years ago, the alcohol-free category existed on the fringes of drinking culture. A dusty bottle in the back of the fridge, reserved for the designated driver, or maybe someone doing Dry January. I have seen first-hand how social acceptance has shifted over the past 10 years, and we should be proud that tens of millions of people regularly consume alcohol-free drinks throughout the year.

This year's Low+No report confirms many of the shifts that we instinctively know are happening, while also surfacing interesting consumer behaviours and highlighting the huge opportunity that is in front of us.

The rise of the "Stealth Pint" is perhaps the most fascinating behaviour and something I have observed first hand. This year's research confirms that 4 in 10 people have ordered an alcohol-free drink without telling their group. It shows how alcohol-free has become a normal part of how people socialise, even if they're not always talking about it openly.

Attitudes towards not drinking have changed enormously over the last ten years, with 6 in 10 saying there is less stigma than there used to be, but there remains work to do. I still hear from people who love having alcohol-free beer but would rather have it served in a plain glass, and the rise of the stealth pint is evidence of that. Over time we will see that stigma erode, as availability expands further, more people regularly consume alcohol-free products and see the health benefits from doing so.

Our job as an industry is to continue to increase availability and awareness of the category right across the country. The growing appetite for alcohol-free products is matching lifestyles which have become more health focussed.

We now need to ensure alcohol-free options are always visible, great tasting and fully integrated into the experience for pub goers and supermarket shoppers. If we do this, it is set to have a transformational impact on the health of drinkers throughout the UK.

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METHODOLOGY:
BASED ON AN ONLINE
SURVEY OF A NATIONALLY
REPRESENTATIVE SAMPLE OF
2,000 UK ADULTS (+18)
CONDUCTED FEB-MAR 2026.

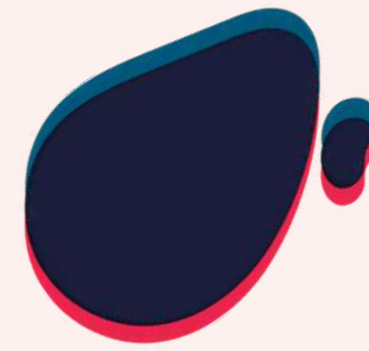
DRINKING DIFFERENTLY: A NEW DRINKING REALITY

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LUCKY SAINT 2026**



A NEW DRINKING REALITY

UNDERSTANDING TODAY'S DRINKING BEHAVIOUR



After years of decline in alcohol consumption and changes in how Brits drink, we've arrived at a more stable but fundamentally different drinking landscape. This has been driven by changing habits, economical, social and cultural drivers across today's generations.

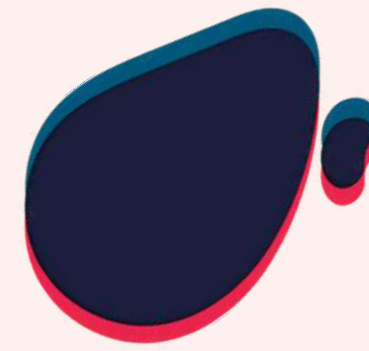
Consumers are no longer organising their behaviour around alcohol versus no alcohol, they are organising it around outcomes, occasions, mood states, functionality and control. Key considerations include drinking attitudes, repertoire expansion and occasion-led drinking.

Alcohol is no longer the default framework around which social drinking is organised.

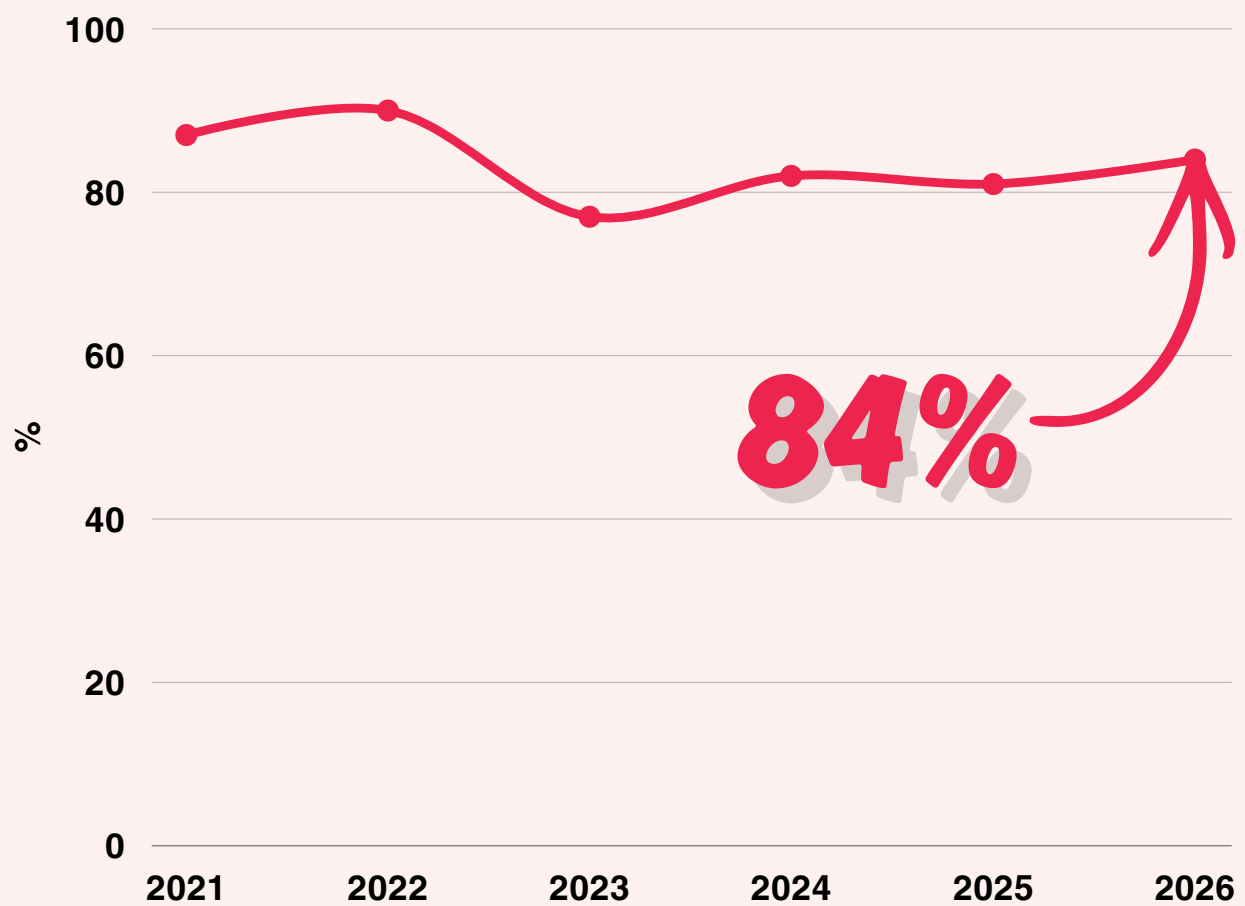


A NEW DRINKING REALITY

FREQUENCY OF ALCOHOL CONSUMPTION HAS STABILISED

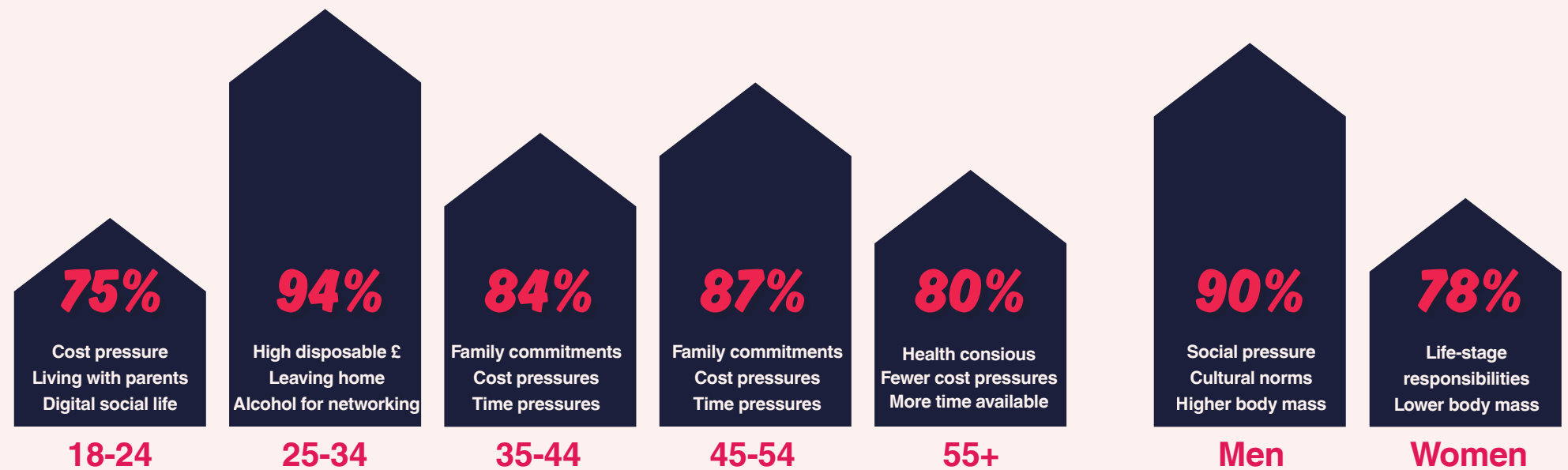


% of UK drinkers who claim to consume alcohol at least once a week or more



At an average level, the number of consumers drinking alcohol on a weekly basis has been relatively stable since 2023, but beneath this sits a growing divide. Drinking behaviour isn't moving in one clear direction but instead is diversifying across the life stages.

Growth will come from fitting into these shifting patterns and delivering against the growing repertoire of drinks across age groups and occasions.



% of alcohol drinkers who consume at least once a week

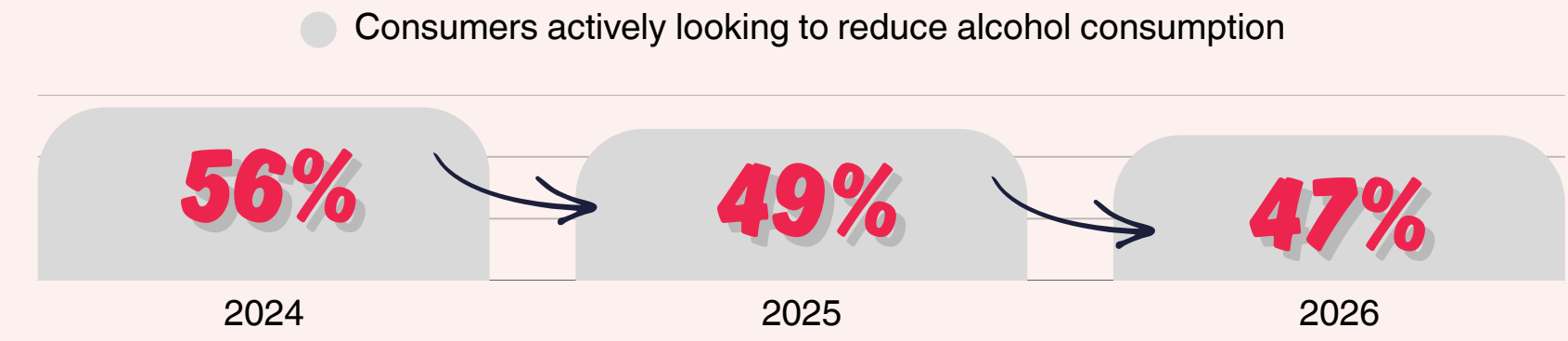


A NEW DRINKING REALITY

VOLUME OF ALCOHOL CONSUMED CONTINUES TO SLOWLY DECLINE

The proportion of UK adults drinking above recommended guidelines continues a gradual downward trend and is now beginning to plateau. The decline has been driven by older drinkers over the last two years, who previously drove higher-volume consumption.

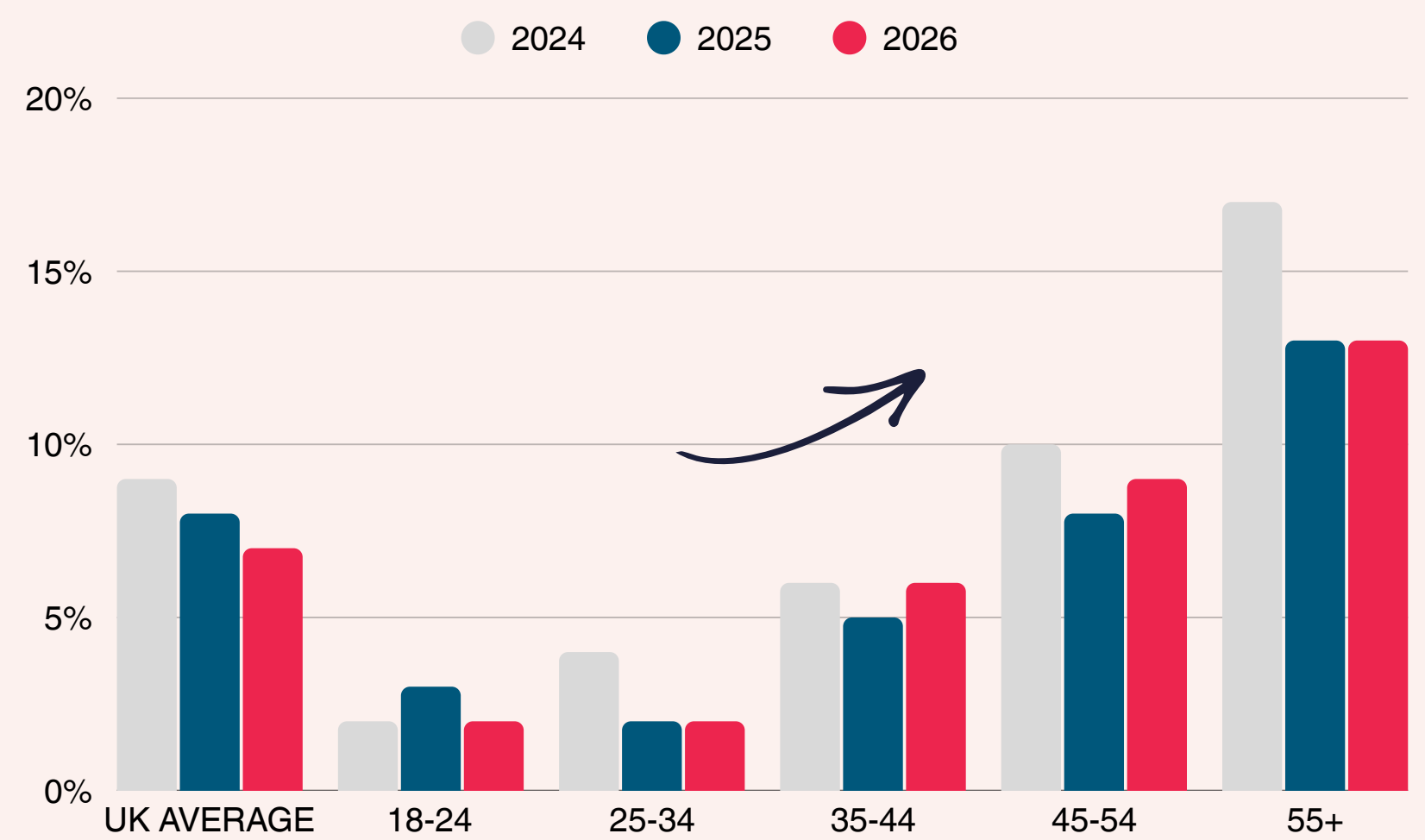
At the same time, half of consumers say they plan to maintain their current levels of alcohol consumption, while nearly as many are still actively looking to reduce.



It is likely that fewer people are actively trying to reduce their volume of alcohol consumption compared with previous years, as they have made reductions and are now at a stage of simply ***maintaining their preferred levels.***

Government guidelines specify a maximum of 14 units per week

The proportion of UK adults drinking above recommended guidelines:





A NEW DRINKING REALITY

WHAT'S DRIVING THE SHIFTS IN CONSUMPTION?

84% give a reason related to health, diet or fitness as one of their key drivers for wanting to drink less alcohol

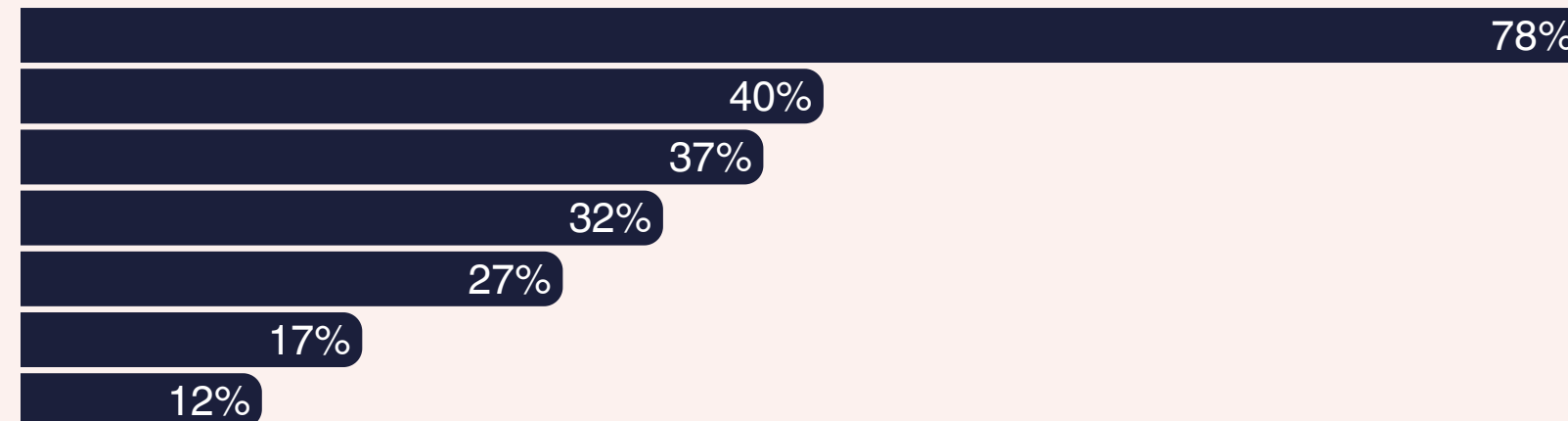
Overall, the reasons for consumers reducing their alcohol intake this year haven't changed significantly since 2025.

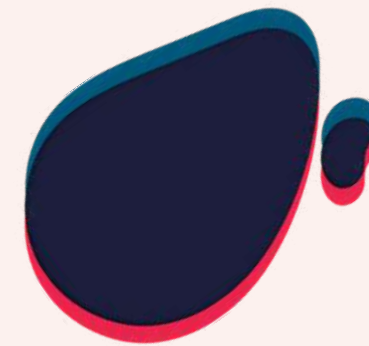
Health remains the dominant driver, with financial pressures and the desire to avoid hangovers also contributing. Wanting to "improve overall health and lifestyle" remains the dominant motivator across all demographics, tracking tightly between 74% and 83% across all age brackets and genders.



Reasons for reducing alcohol intake, from those planning to reduce in 2026

- I want to improve my overall health and lifestyle
- I want to save money by drinking less
- I'm trying to manage my weight, diet, or fitness goals
- I want to feel better the next day and avoid negative after-effects
- I want to be more mindful of my drinking habits
- I want to stay more in control and present in social settings
- I want to be more alert for work and/or other commitments on days after social occasions

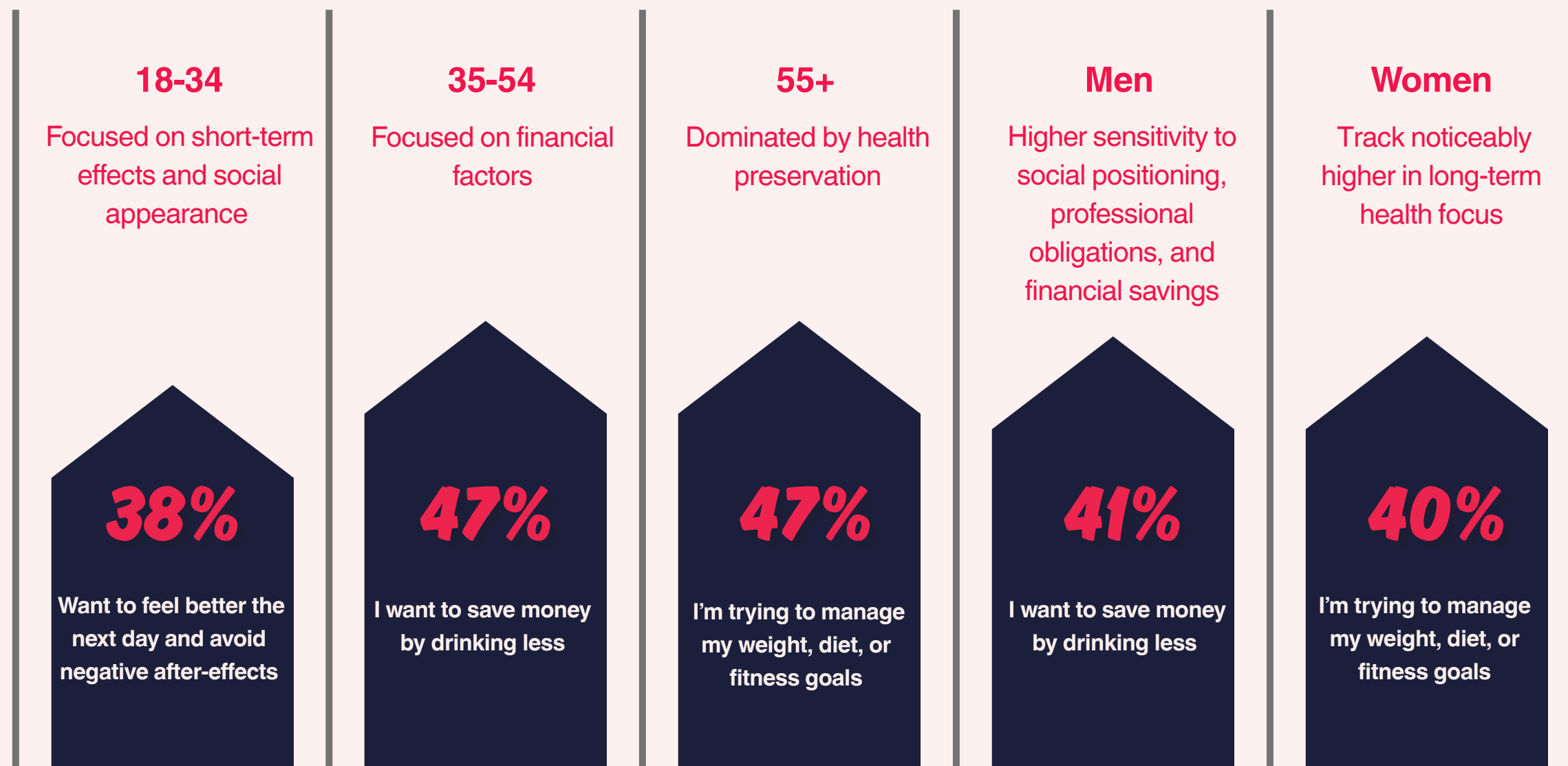




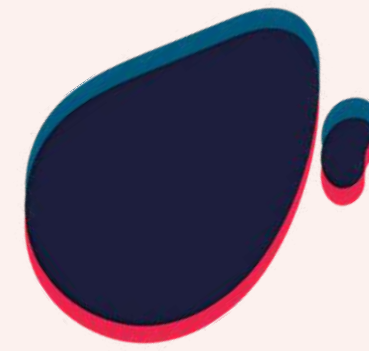
A NEW DRINKING REALITY

MODERATION DRIVERS VARY BY AGE AND GENDER

After 'improving overall health'
what are the top drivers by age:



A NEW DRINKING REALITY SUMMARY



After years of declining alcohol consumption, Britain has entered a new phase. Drinking frequency has stabilised, 84% of drinkers still consume alcohol weekly, yet fewer are drinking heavily and many are actively reshaping how, when and why they drink.

Rather than simply drinking less, consumers are becoming more deliberate. Health remains the dominant driver of change, with 84% citing health, diet or fitness-related motivations for cutting back, but financial pressures, lifestyle choices and changing social habits are also influencing behaviour.

Alcohol is no longer the default choice for every occasion. Consumers are increasingly building more flexible drinking repertoires, selecting different drinks depending on the occasion, mood, desired outcome and level of control they want.

The opportunity is no longer to serve consumers as either drinkers or non-drinkers. It is to understand the growing range of drinking occasions and provide the right drinks for each one.

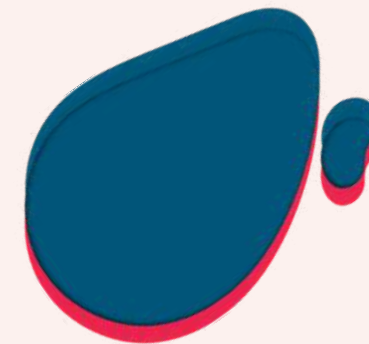
Britain isn't moving away from drinking. It's moving towards more flexible, intentional and occasion-led drinking.



DRINKING DIFFERENTLY: MODERN DRINKING STRATEGIES

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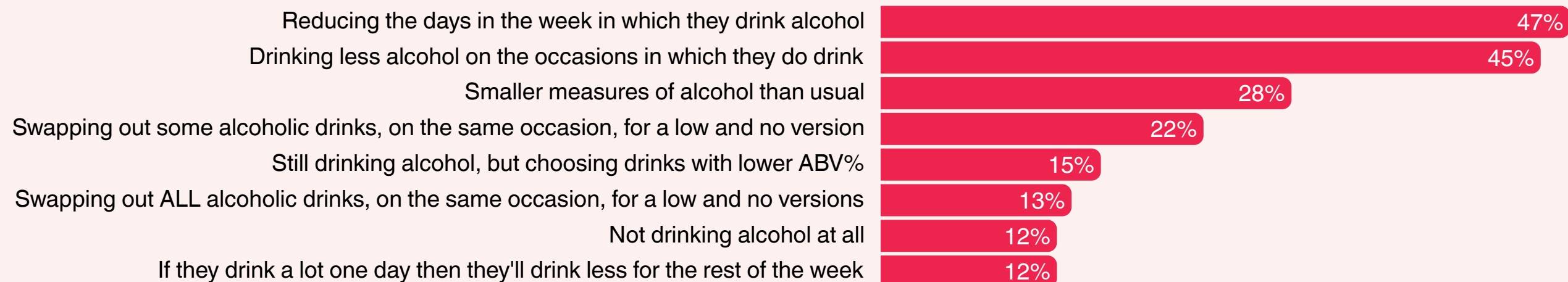


MODERN DRINKING STRATEGIES

'MODERATION TACTICS' ARE BEING ACTIVELY EMPLOYED

71% of those who consume alcohol are using multiple tactics to help manage their alcohol intake. (80% of those under 35's but just 53% of 55+ year old)

The tactics most likely to be used:



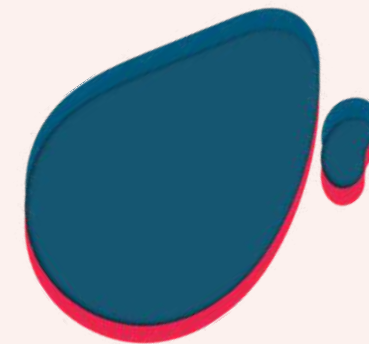
Managing alcohol intake has become conscious and deliberate

Many people are making the decision to drink on fewer days, consume less on each occasion, and adjust formats and measures to stay in control. Low and no is part of this mix, used alongside other practical choices as part of everyday drinking.

The 25–34 year olds are leading efforts across nearly all methods of moderation. This age group is increasing frequency but not increasing volume.

People aged 55+ lean toward simple choices, avoiding strategies or non-alcoholic alternatives in favour of complete abstinence.

Men lean toward product substitution methods like selecting lower ABV% options, while women are more inclined to cut alcohol out completely.



MODERN DRINKING STRATEGIES

MANAGING ALCOHOL INTAKE IS NOT TIED TO JUST ONE OCCASION

Cutting back is no longer reserved for specific moments in the calendar or during particular social occasions.

Moderation is not confined to Dry January or one-off resets; for many it is now consistent, year-round behaviour. People are actively managing their alcohol intake across both the 'everyday' and even traditionally alcohol-led occasions such as Christmas.

We see this coming through in sales data, with Christmas and summer now consistently the biggest periods for the category in both the on and off-trade.

What stands out is the spread of occasions- from family meals to sporting events- where drinking habits are being adjusted.

Occasions when moderators are attempting to reduce their alcohol intake this year:

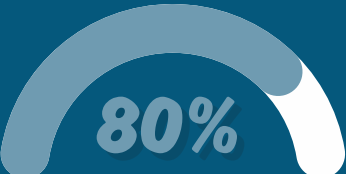


CASE STUDY: LUCKY SAINT'S "THOU SHALT GO TO THE PUB" CAMPAIGN: ZEBRA STRIPING OUR WAY THROUGH DRY JAN

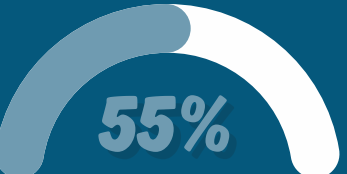
Dry January continues to play an important role in recruitment and trial for the category when health and behavioural resets are front of mind. However, it's now less about total abstinence and more about leveraging low and no to cut down on overall consumption

Lucky Saint's "Thou Shalt Go to the Pub" campaign encourages footfall in a tough month for the on-trade, by driving consumers to pubs to redeem a free pint.

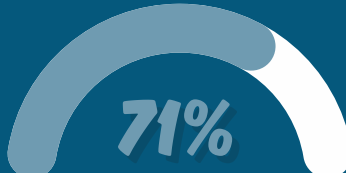
We've seen repeatedly that once they are in venue, consumers upweight their spend - this year we asked what else they were buying. 1 in 4 chose another Lucky Saint, but 1 in 5 went on to purchase an alcoholic drink after redeeming their free pint, highlighting both the zebra striping behaviour in action and the role of moderation versus complete abstinence.



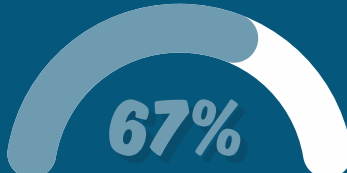
Brought someone with them to redeem their free pint



Purchased something else alongside their free pint



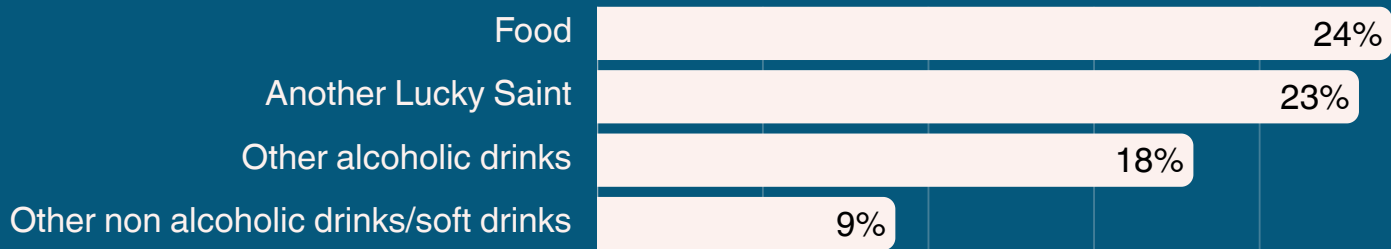
Weren't regulars at the pub they chose to redeem at



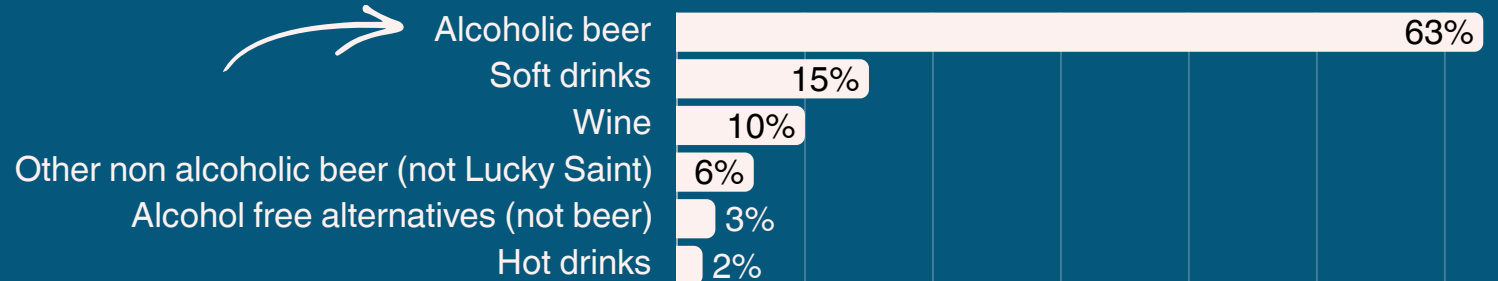
Visits were driven by a desire to claim their free pint



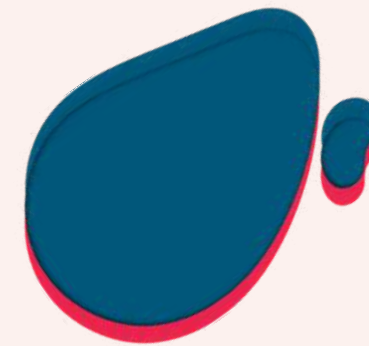
What else did consumers buy when they redeemed a free pint?



Which other drinks did consumers choose when redeeming a free pint?



Lucky Saint consumer survey 2,272 responses



MODERN DRINKING STRATEGIES

'DATA-LED DRINKING' IS INCREASING

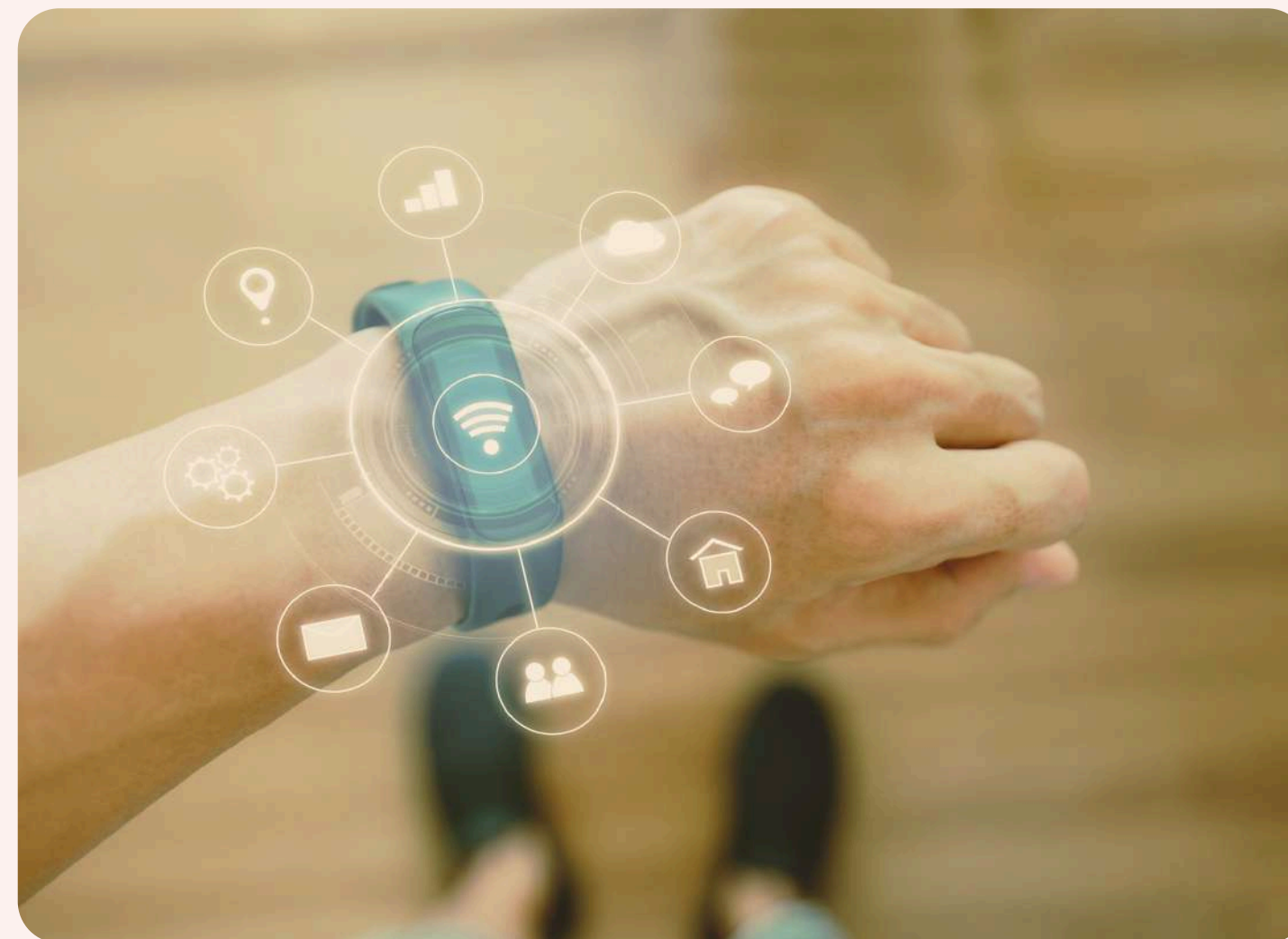
30% of UK adults now own a smartwatch*. Access to health data is making consumers more aware of the impact their drinking behaviour has on factors such as sleep, recovery and heart rate.

Of those who track health metrics, the majority will make tactical changes as a result including drinking less, zebra-striping, and completely switching to alcohol-free options. Low and no drinks are increasingly becoming part of how consumers manage performance in their everyday lives. **Data-led drinking in action.**

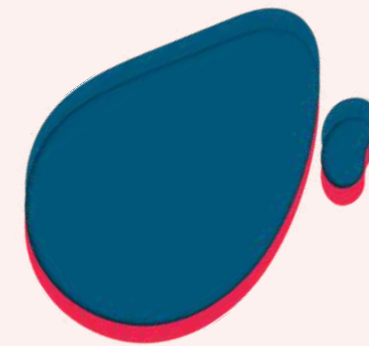
59% of UK adults say that they track their health metrics to some extent (e.g., sleep, heart rate, steps, calories, recovery etc.) when they have been out drinking alcohol (higher for younger age groups - 84% for 25-34s)

81% of those who track their health metrics make changes to their drinking behaviour as a direct result of seeing the impact of alcohol

Tactical changes being made on a night out as a result of tracking health metrics:



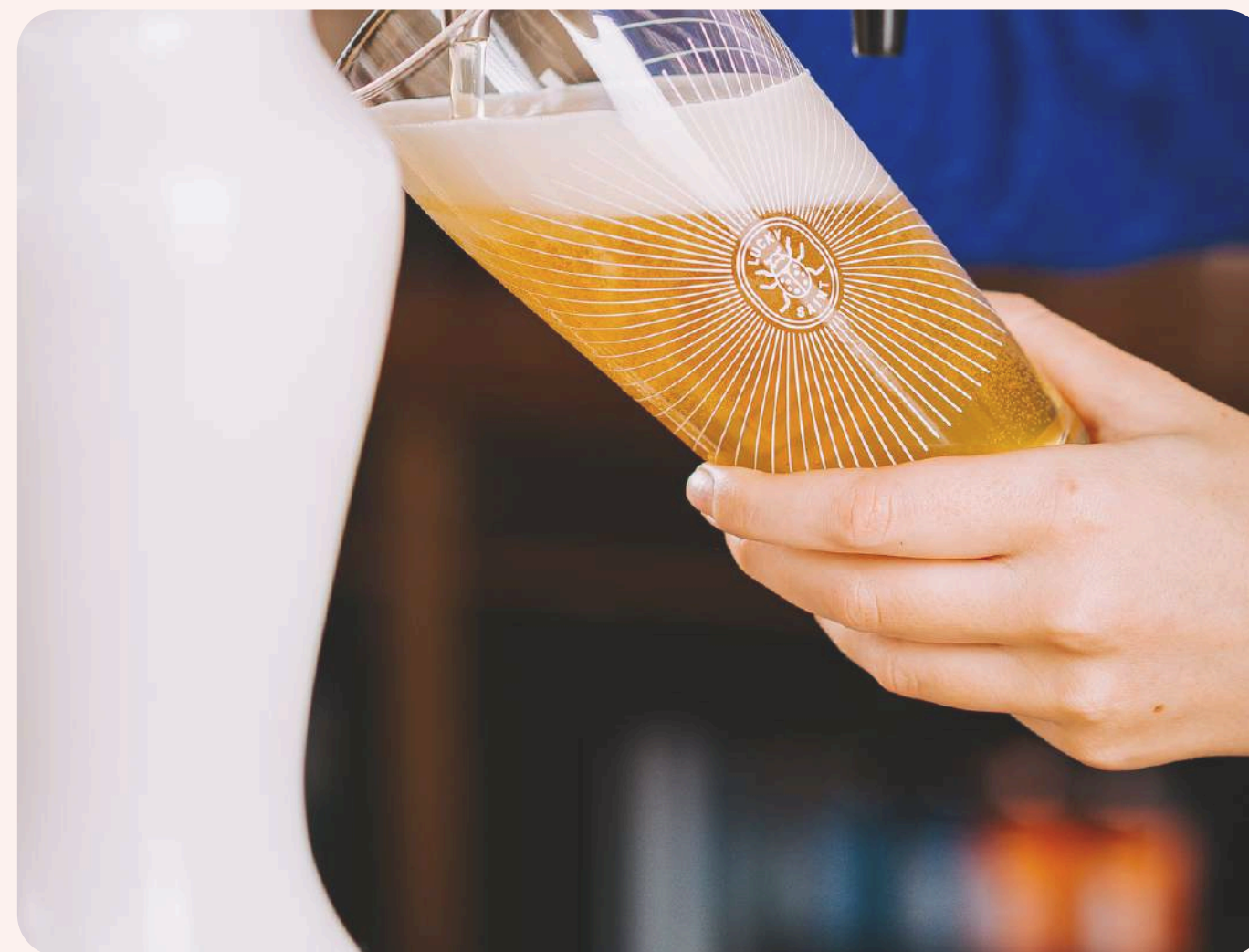
Source: *YouGov 2024-2025 survey



MODERN DRINKING STRATEGIES CONSUMERS RECOGNISE THE BENEFITS OF LOW AND NO

47% say that when they go out socially, how they feel the next day plays a role in their drink choices

Outcomes which consumers expect when they choose low and no:



MODERN DRINKING STRATEGIES

AN INCREASED INTEREST IN FUNCTIONAL DRINKS

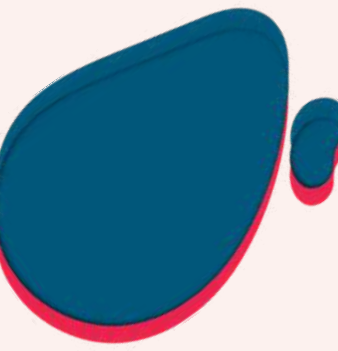
Consumers are also increasingly open to drinks which provide a functional benefit (alongside the benefits which come from being alcohol-free).

53% say they would be more likely to choose a low and no drink that also claims a specific functional benefit (e.g. hydration, enhanced mood, recovery, focus) over one that doesn't

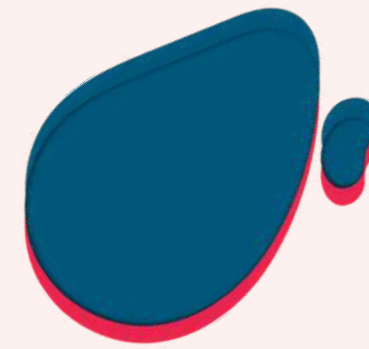
47% of UK adults consume a 'functional soft drink' (e.g. energy drinks, protein drinks) on a monthly basis.

People are becoming more outcome-driven in how they choose what to drink. Health tracking and greater awareness of cause and effect are shaping behaviour, with people actively seeking drinks that deliver clear, measurable benefits. These range from better sleep and recovery to improved energy and focus, influencing decisions both during and after the occasion.

This blurring of the lines between low and no and functional drinks means that both are being chosen for how they make people feel. They should not be treated as separate categories, but as part of a broader benefit-led offer. The opportunity lies in curating a range that meets different needs and outcomes, rather than organising around traditional linear category lines.



MODERN DRINKING STRATEGIES SUMMARY



Consumers are actively finding ways to balance their drinking and due to cultural and social changes, as well as more visible health metrics, alcohol is no longer the default choice for many. Consumers are seeking out different drinks that fit in with changing occasions and priorities.

Tactics to drink less alcohol are used across different occasions, from drinking on fewer days to alternating within a single night. These patterns are now structured, repeatable and widely adopted.

Balance is part of everyday behaviour, not limited to specific moments or short-term resets. It shows up consistently across the week, across occasions and across life stages. This creates a clear opportunity for brands and operators to align with these behaviours.

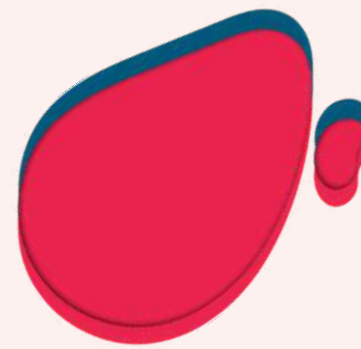
Low and no plays a clear role and needs to be visible, accessible and relevant, supporting consumers as they reshape how they drink.



DRINKING DIFFERENTLY: THE LOW AND NO LANDSCAPE

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LUCKY SAINT 2026**





THE LOW AND NO LANDSCAPE

LOW AND NO CONSUMPTION IS EXPANDING IN REACH AND DEPTH

29 million UK adults now consume low and no drinks on a monthly basis (53% of UK adults)

+7.1 million UK adults are 'monthly consumers' of low and no in 2026 vs 2023 (53% of UK adults vs 40%)

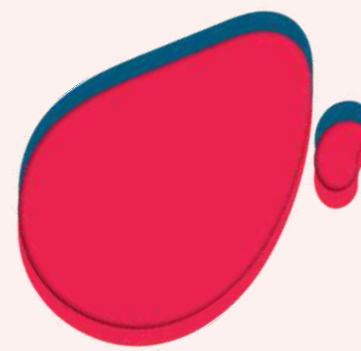
22% of low and no drinkers say they are drinking *more* alcohol-free drinks now compared to 12 months ago

60% of low and no drinkers have tried a NEW low or no brand in the last 12 months (i.e. a brand they'd never tried before)

The low and no category continues to grow, attracting new consumers while encouraging existing drinkers to explore more brands and products.

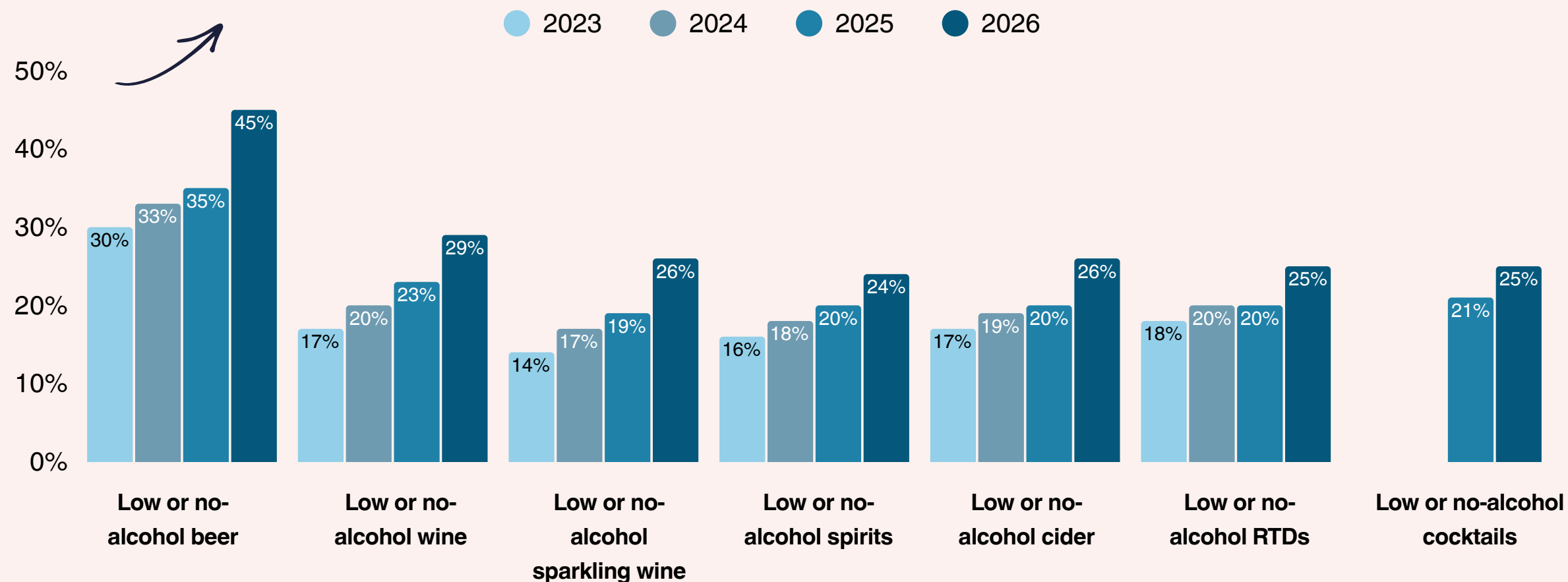
More than half of UK adults now consume low and no at least monthly, with only 24% saying they never drink low and no (down from 34% just two years ago.)

Strong levels of trial show consumers remain engaged and willing to experiment with new brands and products, with an impressive 60% of low and no drinkers trying a new brand in the last year.



THE LOW AND NO LANDSCAPE CONSUMERS ARE BUILDING BROADER LOW AND NO REPERTOIRES

% of UK adults who consume the following once a month or more:

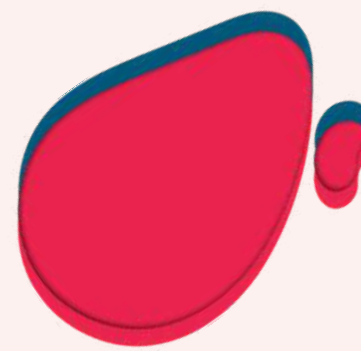


Low and no consumption continues to grow across every category, showing that consumer demand is broadening well beyond beer. An ongoing growth in monthly consumers across all low and no categories suggests low and no is becoming a more established and versatile part of how people drink.

While low and no beer remains the most widely consumed category, wine, spirits, cider, sparkling wine and cocktails have all seen a consistent rise in the number of regular consumers.

Consumers are increasingly building repertoires of different low and no drinks, rather than relying on a single substitute for alcohol.

53% of those who drink low and no beer will also drink low and no cider

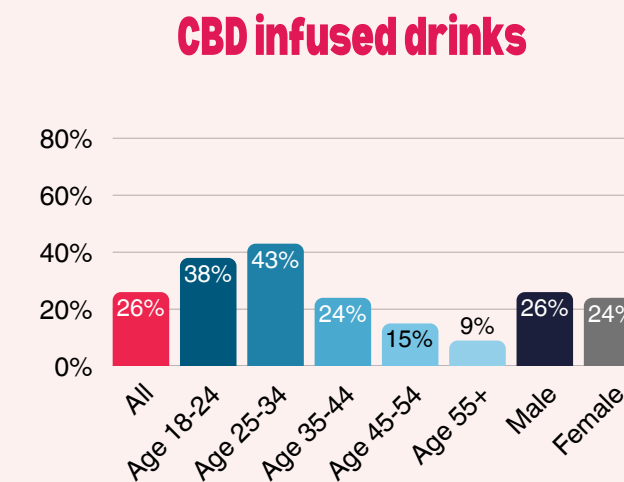
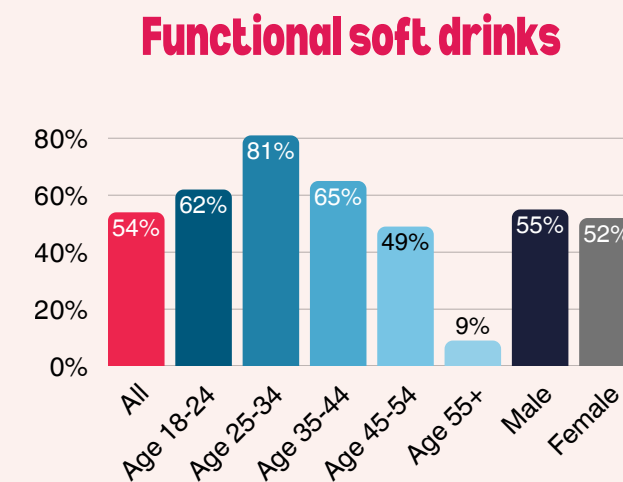
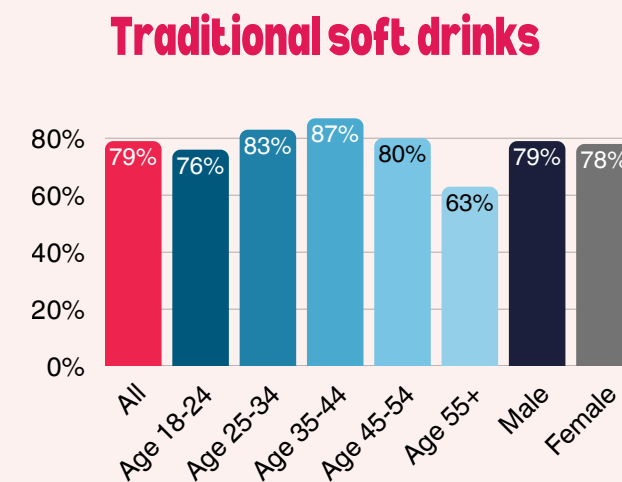
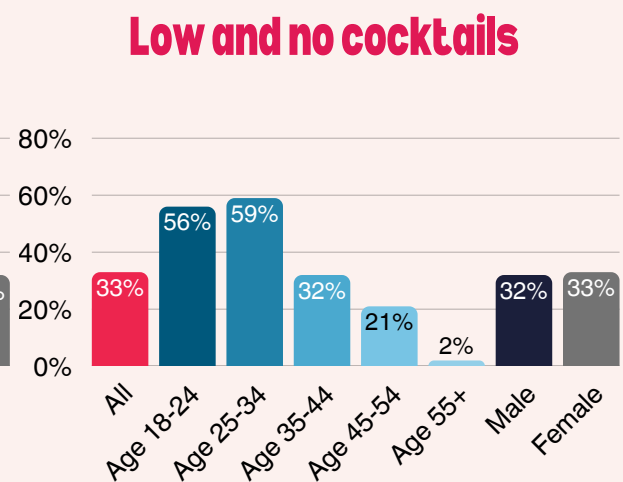
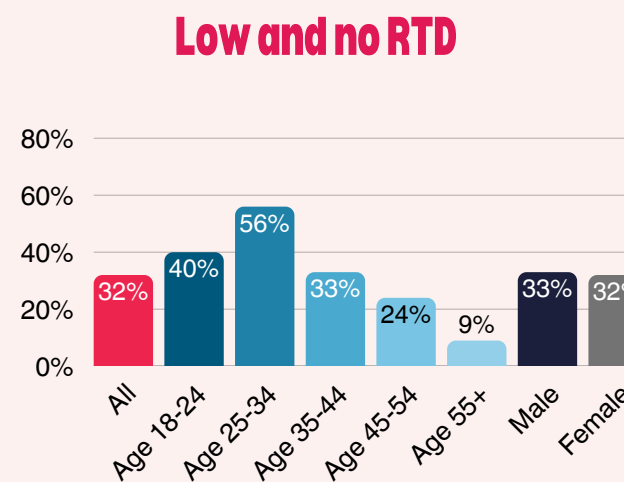
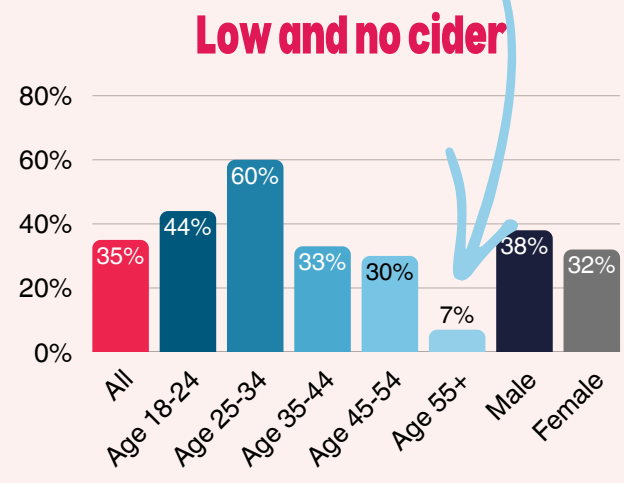
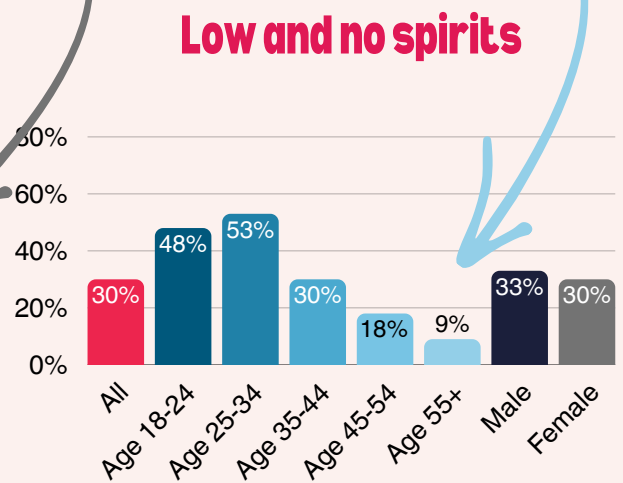
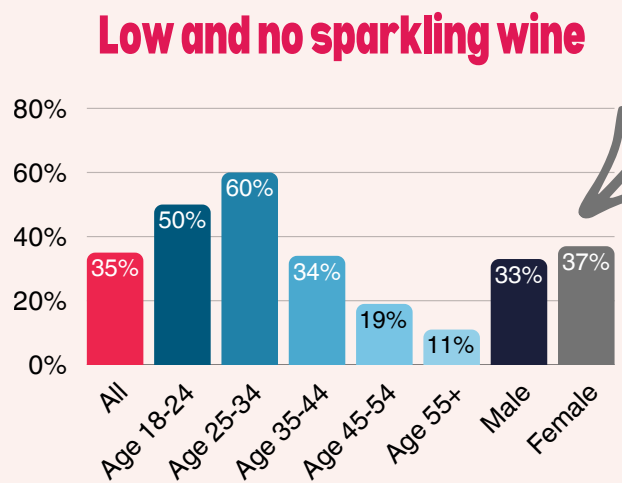
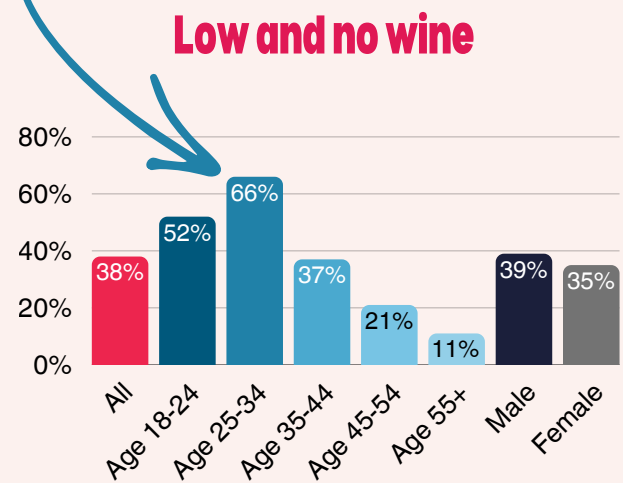
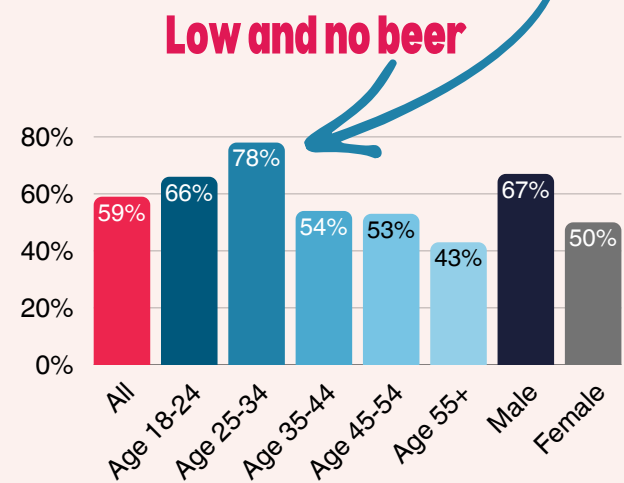


THE LOW AND NO LANDSCAPE CATEGORY CONSUMPTION FREQUENCY BY TYPE

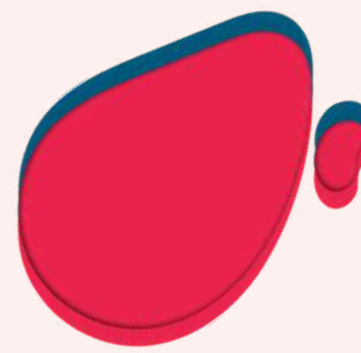
The younger age groups are more likely to be consuming all low and no categories on a monthly basis than the older age groups across all low and no categories.

Men are slightly more likely to consume low and no drinks on a monthly basis in all categories except sparkling wine and cocktails. Beer and cider see the biggest difference by gender.

There is a sharp drop-off in frequency of consumption in the over 55s, in all low and no options except for beer.



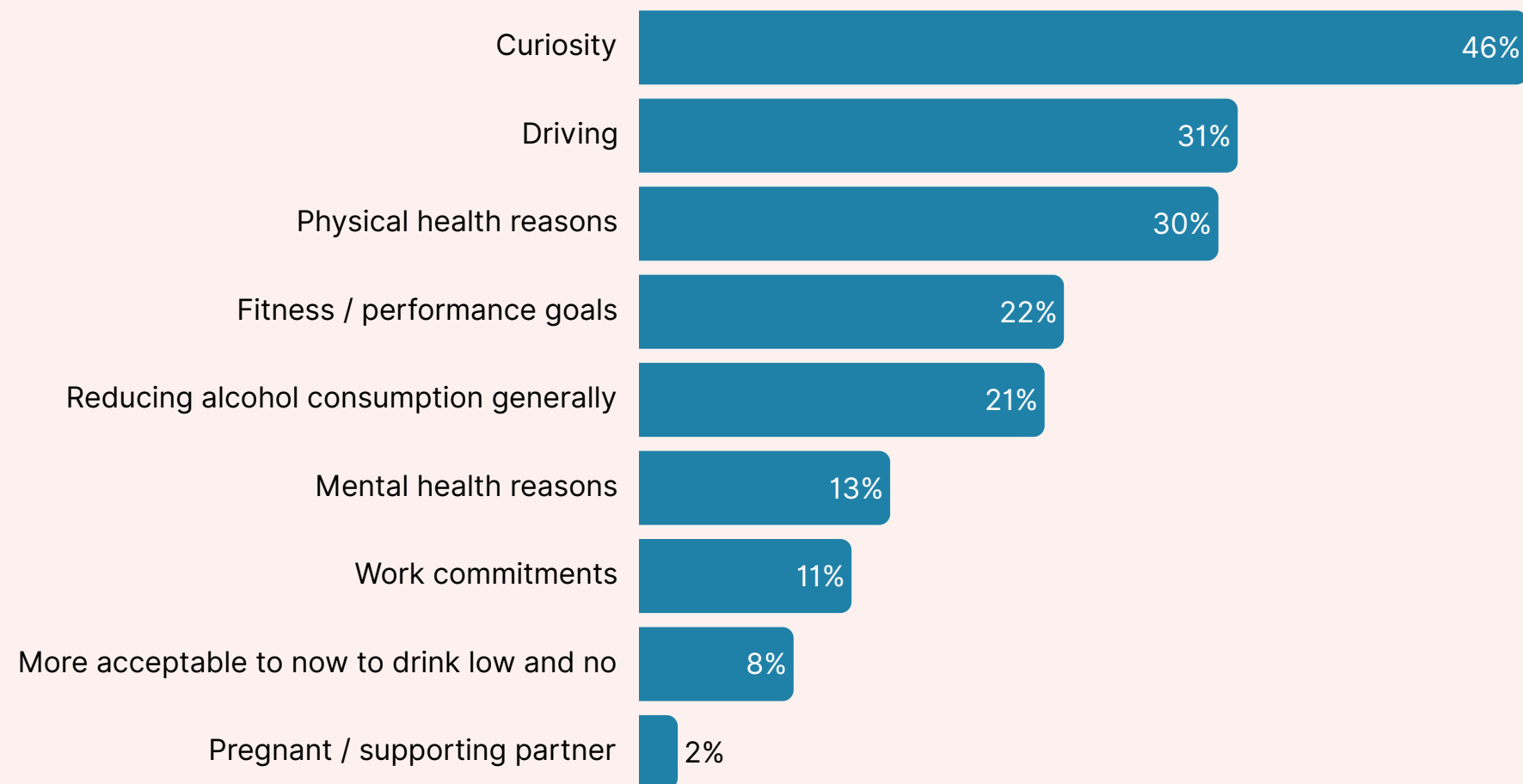
Frequency of consumption, once a month or more.



THE LOW AND NO LANDSCAPE

THE FIRST STEPS INTO LOW AND NO

What drives consumers to try low and no for the first time...

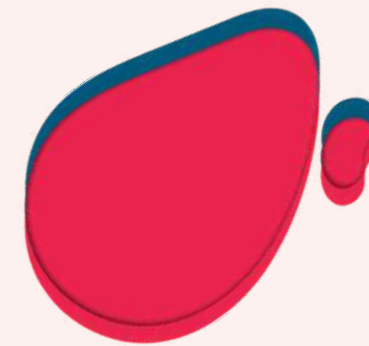


The journey into low and no is often driven by practical occasions rather than a conscious decision. Curiosity, driving and health-related goals are all key triggers for first-time trial. Consumers are increasingly making drink choices based on the needs of a specific occasion rather than a simple alcohol versus non-alcohol decision. As we've seen previously, health-related drivers are most likely to then sustain engagement in the category.

Drivers differ by age: while curiosity is the biggest driver across all age groups, younger drinkers highlight mental health reasons and fitness performance as key drivers, whereas 55+ year olds are much more likely to try low and no because they are driving or as a way to cut down on alcohol generally.

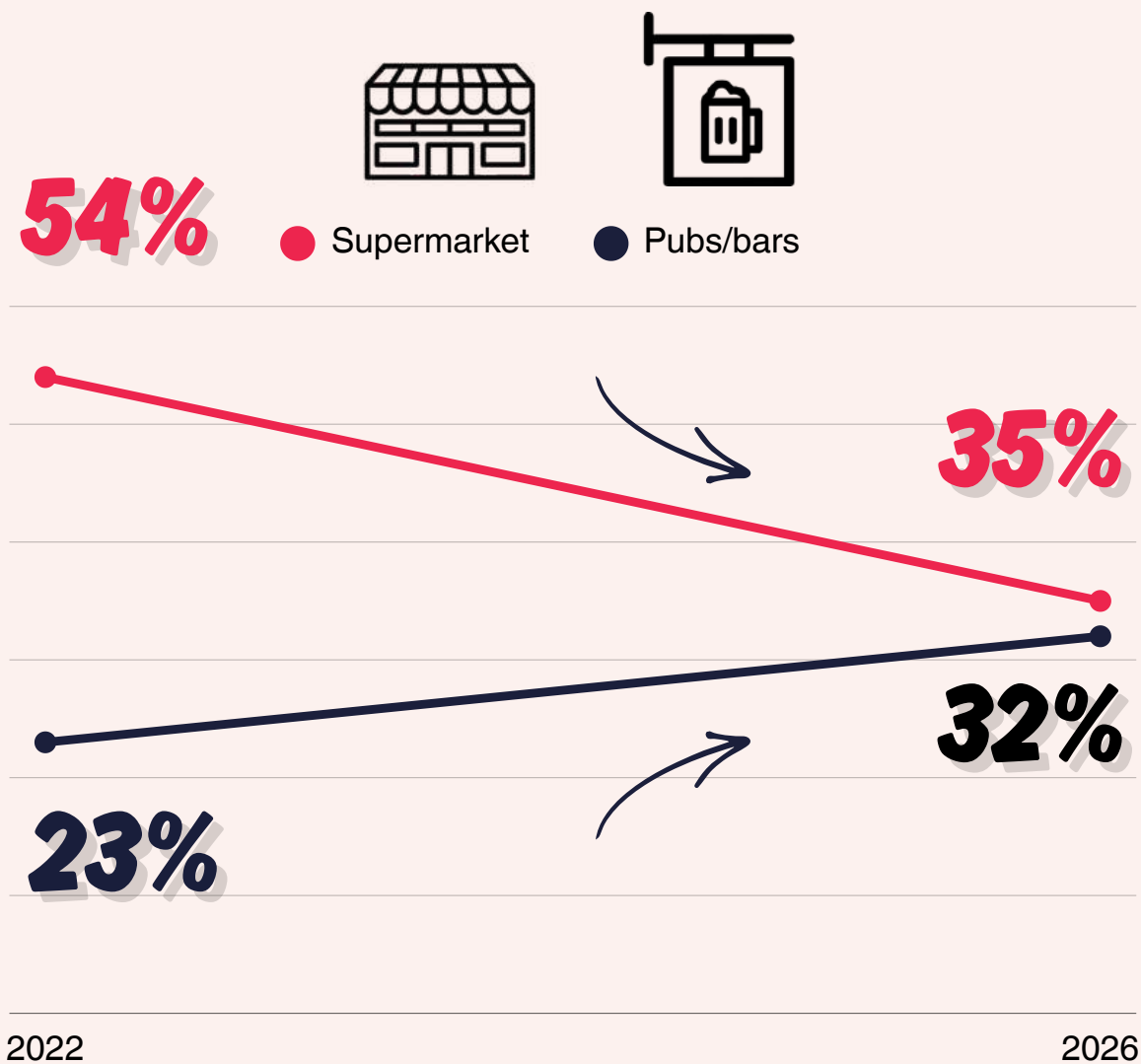
Most consumers first enter the category simply because they want to try something new. This highlights the importance of visibility, discovery and trial opportunities in attracting new consumers.

Consumers are actively choosing low and no, not simply settling for it as an alcohol-alternative.



THE LOW AND NO LANDSCAPE LOW AND NO CATEGORY DISCOVERY IS CHANGING

Where people discover new low or non-alcoholic drinks:



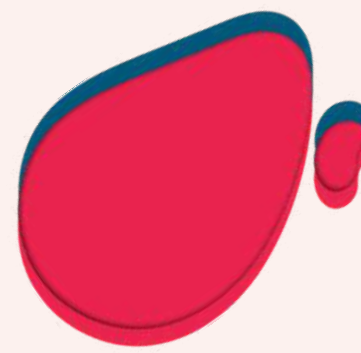
60% of low and no consumers say they have tried a NEW low or no brand in the last 12 months (i.e. a brand they'd never tried before)

People are still exploring different low and no brands as curiosity among consumers remains high and choice is expanding. Where they go to find them though, has changed considerably over the last four years.

Supermarkets were historically where the majority of consumers discovered new brands but hospitality is now growing in importance as a channel for low and no discovery. The brands and operators that make low and no visible, engaging and easy to navigate, matching their range to both occasions and visitors, will shape what consumers choose next.

Where *else* low and no consumers discover new low and no brands:

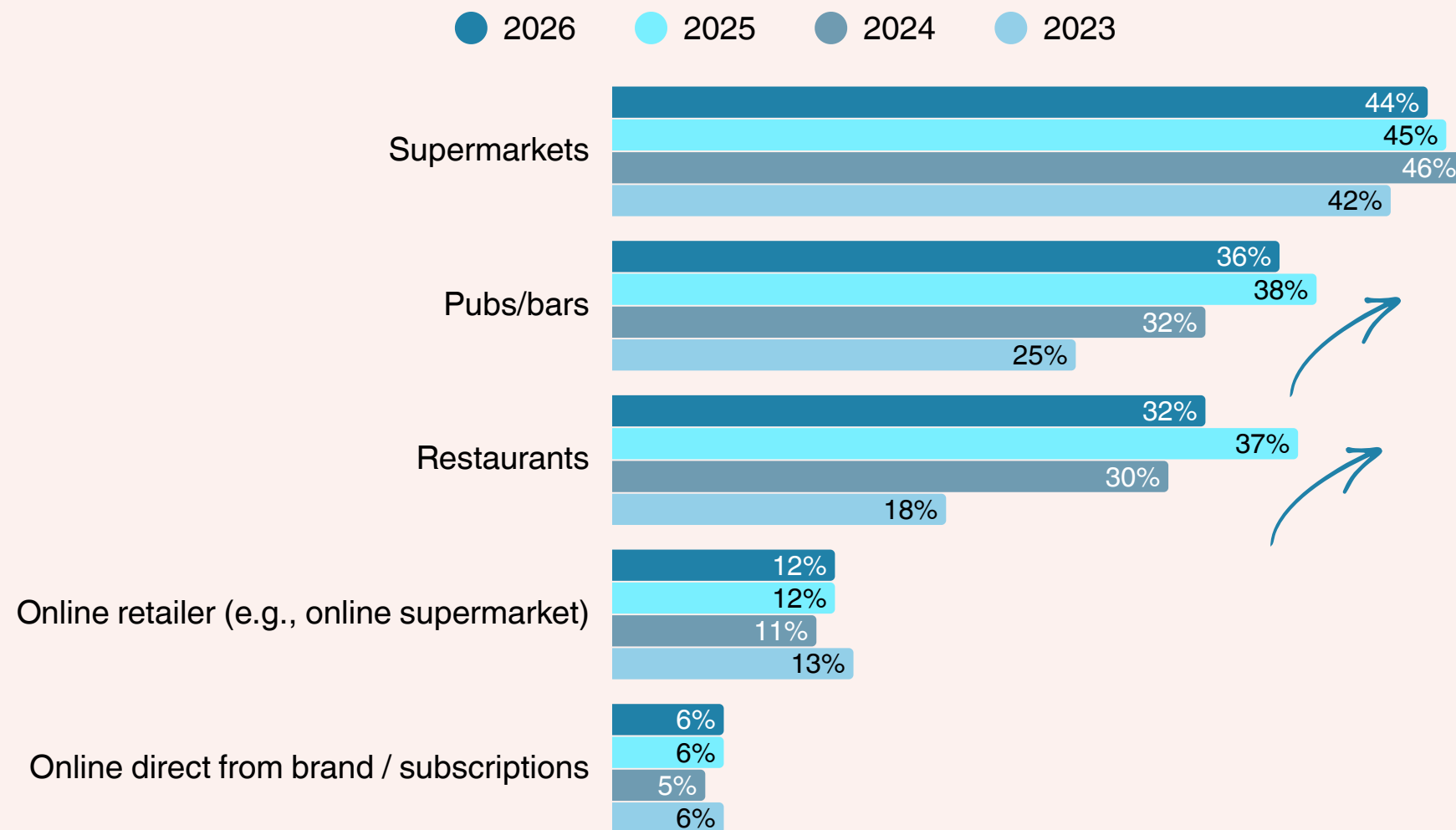
- Friends' recommendations **31%**
- Social media **26%**
- Internet search **17%**



THE LOW AND NO LANDSCAPE

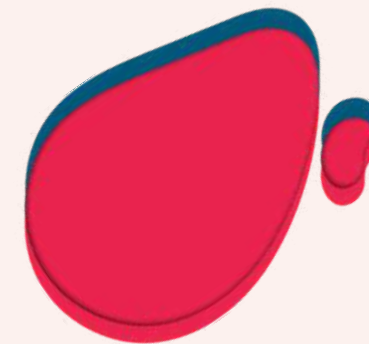
LOW AND NO IS BECOMING A MULTI-CHANNEL CATEGORY

% of UK adults who have bought low and no from the following retail environments in the last 3 months:



Consumers are becoming more comfortable choosing low and no wherever they drink. While supermarkets remain the largest route to purchase for low and no, strong growth in pubs and restaurants suggests low and no is becoming a more established part of social occasions rather than simply an at-home purchase.

Pubs and restaurants continue to grow their share of consumer engagement with 29% of UK adults having bought low and no in BOTH the on-trade and the off-trade, highlighting the increasingly important role hospitality plays in driving trial, discovery and repeat purchase.



THE LOW AND NO LANDSCAPE

LOW AND NO IS A SIGNIFICANT PART OF THE MODERN DRINKER'S REPERTOIRE

97% of monthly low and no drinkers ALSO drink alcohol

The split of consumption for the average consumer, between full-strength, mid-strength and low and no alcoholic drinks is as follows (As perceived by consumer - 0% included in average):



53% are full-strength

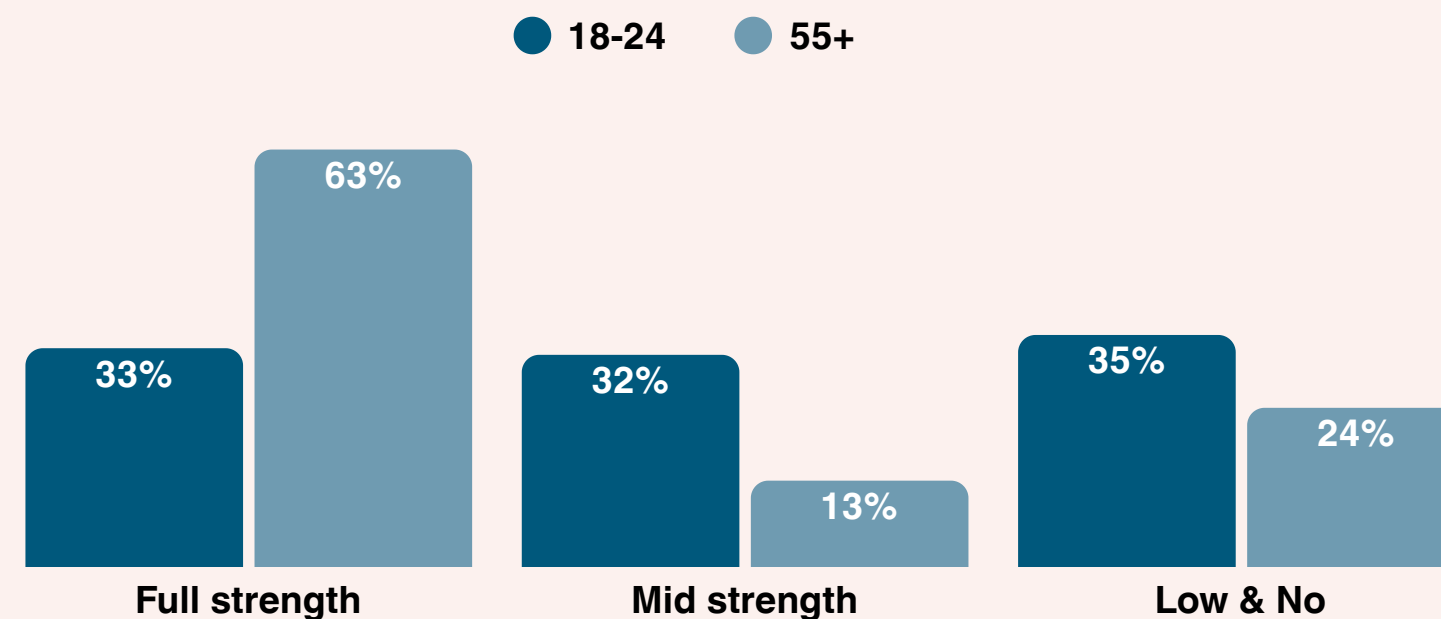


21% are mid-strength



26% are low and no

% of low vs mid vs full-strength consumption by age:

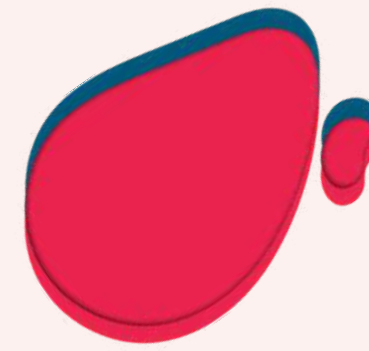


The split across the three core segments varies drastically by age groups. Younger consumers perceive themselves to be drinking more low and no and mid-strength compared to the over 55's. The older age group's drinking habits remain weighted towards full-strength alcoholic drinks but with a growth in low and no consumption vs last year.

KAM In partnership with: **LOW+NO LUCKY SAINT 2026**

Q. What percentage of the beer, wine or spirit drinks that you consume currently are alcoholic vs. mid-strength vs. low and no alcohol versions?

THE LOW AND NO LANDSCAPE SUMMARY



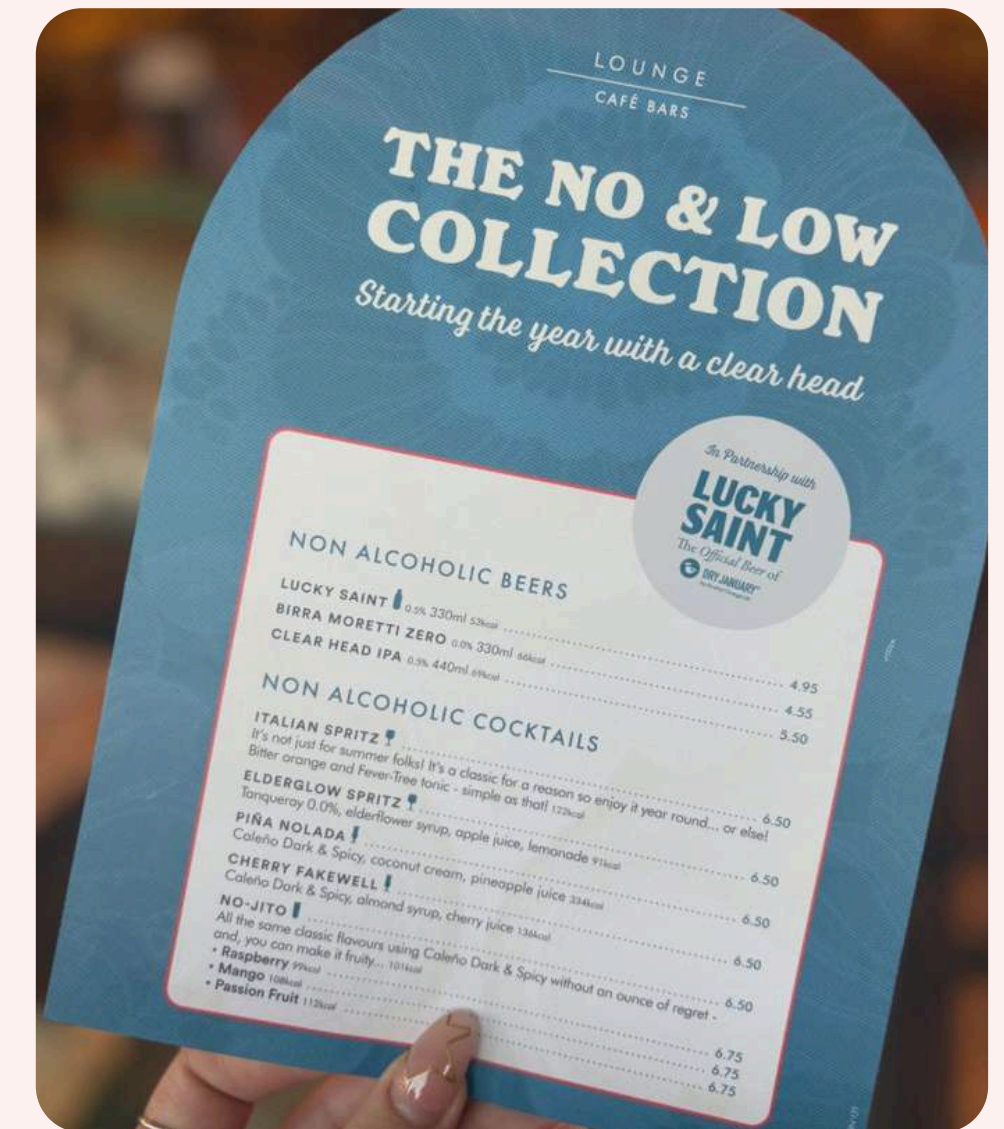
The low and no category has continued its transition from niche to mainstream, with more than half of UK adults now consuming low and no alcohol drinks on a monthly basis. However, the story is no longer simply one of category growth.

Today's consumers are building broader and more varied low and no repertoires, incorporating different drink types into different occasions rather than relying on a single alcohol-free alternative. While beer remains the largest category, wine, spirits, cider, RTDs and cocktails are all seeing growth, reflecting a consumer base that is becoming increasingly comfortable choosing low and no across a wider range of drinking occasions.

The category is also benefiting from high levels of engagement and exploration. 6-in-10 low and no consumers have tried a new brand in the last year, while hospitality is becoming an increasingly important channel for discovery, narrowing the gap with supermarkets as a source of trial and inspiration.

Perhaps most importantly, the research suggests that low and no is not a separate category sitting alongside alcohol - 97% of monthly low and no drinkers also drink alcohol. Instead, it is becoming an established part of modern drinking repertoires. Consumers are increasingly mixing full-strength, mid-strength and alcohol-free drinks depending on the occasion, their priorities and what they want from the experience.

The opportunity for retailers, hospitality operators and brands is shifting from simply offering a low and no option to understanding how low and no fits within a broader, more flexible approach to drinking.



CASE STUDY: GREENE KING - OUTLET SEGMENTATION AND RANGE

The word “segmentation” can send an entire room of sales people to sleep with a single utterance, but without any thought of it, a drinks range can be left looking at best odd, but at worst, damaging to the profitability of the pub. The importance of both drinks category segmentation (i.e standard lager vs world lager) and outlet segmentation, or “typology” (how we classify pubs), were drilled into me during almost a decade on the data agency side. It was that knowledge that has shaped what we are trying to do in leased and tenanted, helping our Partners run even better pub businesses by getting their ranging right.

Whilst most managed brands benefit from the consumer knowing what they are going to get when they walk in, with drinks ranges curated accordingly, the world of LandT pubs (and similarly free trade) is another story. Greene King Pub Partners have a vast array of sites in our estate, which we now classify all the way from wet-led high street “Civic Taverns” to Michelin-star “Destination Dining” gastropubs. We cannot discount the fact that our brilliant Partners, with their vast knowledge and experience, combined with our expert operations team, often have a great instinct for what should go on their bar (which in LandT, is ultimately up to the Partner). But without a ranging “blueprint” linked to typology in place, which is something we have recently introduced in Pub Partners for our draught range, our teams walk into business reviews with only half the picture of which brands would best suit the pub’s customers.

The guidance is based primarily on what we know is working on the bar in similar sites, but also incorporates elements such as regionality, consumer segmentation, commercial viability and wider category and insight information. And we know it works; looking at the average pints a week sold of a craft beer brand in a Community Champion vs a High Street’s Finest for example paints a very clear picture of why typology is important. We particularly encourage our ops teams to focus on what to do with low throughput lines, recognising the threat of a customer walking away from that pint, or even the pub, if they are served something that has been sat in the line for days.



This is all even more important when we come to talk about no and low offerings on draught. We are still very early in our journey on draught no and low and working with our supplier partners, we only recommend it in more premium sites where it is more likely to find its audience and ultimately, can justify its place on a crowded bar. But we recognise the importance of the how the category boosts inclusivity and can not just bring a group into our Partner’s pubs on the back of a draught listing, but also keep them in for longer.

Although the focus has very much been ranging in draught so far, we also sell a wide range of no and low options across packaged beer, cider, spirits and wine to our pubs. Similarly, putting thought into this and not just offering it as token gesture (a much easier job given the explosion of options now available), increases the chances of a pub profiting vs everyone’s greatest enemy, a pint of tap water. For example, a pub that offers a range of craft beers should look to offer Low and no options in the fridge, whilst those who trade well on mainstream cocktails should ensure they have equivalent no and low options on the back bar.

It certainly isn’t rocket-science, but outlet segmentation is often overlooked by operators and suppliers. Having even a basic grasp of what fits where means everyone is on the same page and gives brands the best chance of success.

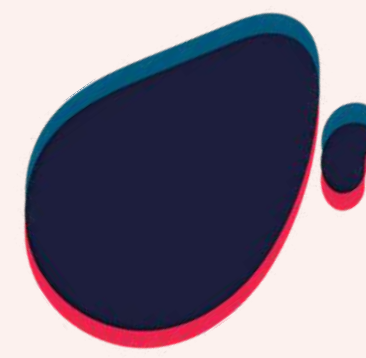
Paul Bolton

Commercial Category Manager - Greene King Pub Partners

DRINKING DIFFERENTLY: BEHAVIOUR IN HOSPITALITY VENUES

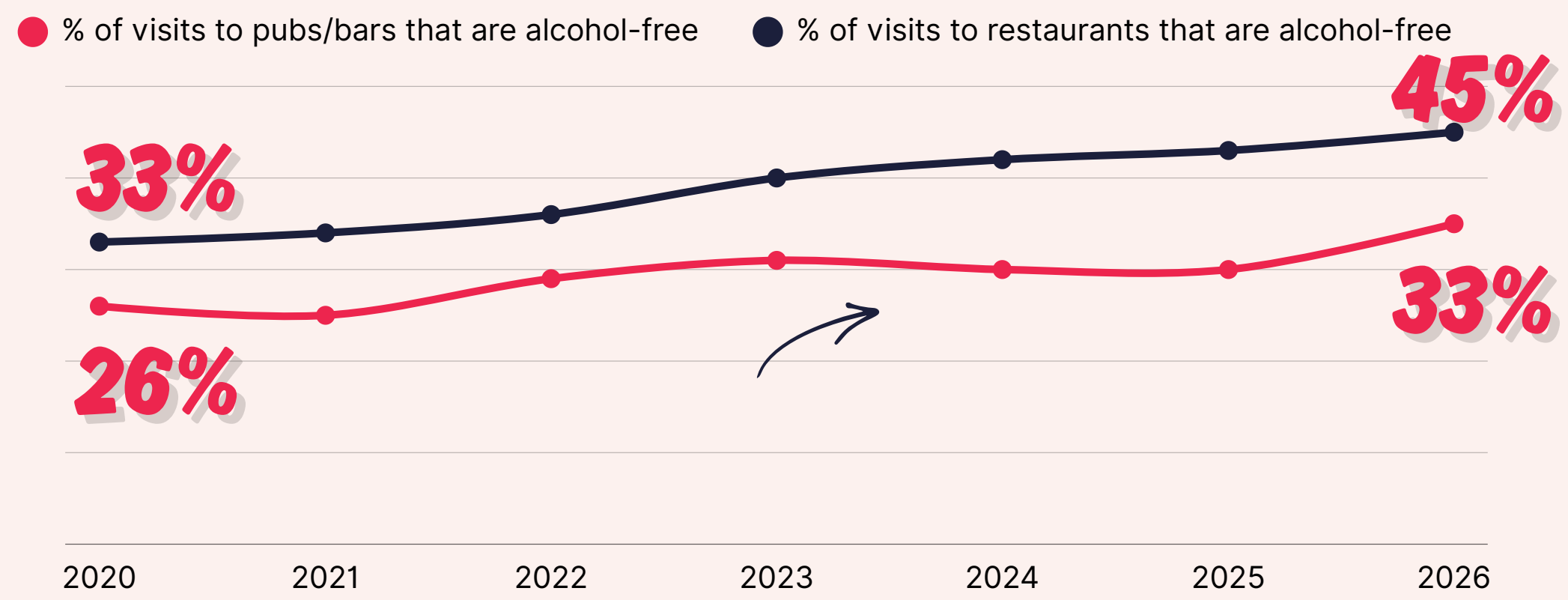
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LUCKY SAINT 2026**





BEHAVIOUR IN HOSPITALITY VENUES

ALCOHOL-FREE HOSPITALITY OCCASIONS CONTINUE TO GROW



Alcohol-free occasions are increasingly a core part of the hospitality landscape. Over a third of pub and bar visits are now completely alcohol-free, rising to 45% in restaurants. These are the highest levels we've seen since we started tracking this data back in 2020.



BEHAVIOUR IN HOSPITALITY VENUES

LOW AND NO MOVES UP THE DECISION HIERARCHY

When you visit a pub, bar, or restaurant and have a 'non-alcoholic' drink, which of these would you currently consider drinking?

	2021	2026	Change
Carbonated Soft	48%	38%	-10%
Non Alc Beer	11%	29%	+18%
Hot Drinks	30%	25%	-5%
Tap Water	23%	19%	-4%
Non-Alc Wine	4%	19%	+15%
Non-Alc Cider	7%	15%	+8%
Non-Alc Spirits	3%	11%	+8%
Non- Alc Cocktails	4%	10%	+6%

Fewer consumers are defaulting to tap water when not drinking alcohol, which means that more spend is being captured by credible alternatives.

Alcohol-free alternatives are increasingly trusted options when a guest does not want to consume alcohol, with increases across all low and categories. Low and no beer continues to perform strongly, it is now 2nd most popular choice behind soft drinks.

Low and no is an established part of the consumer repertoire. Awareness has grown. Credibility has improved. The focus is moving towards how well venues are delivering the offer within the wider drinks range.



BEHAVIOUR IN HOSPITALITY VENUES

GUESTS ARE LESS LIKELY TO

DEFAULT TO TAP WATER

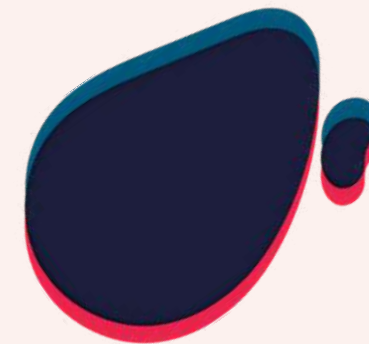
Back in 2024 KAM highlighted a **£800m missed opportunity** that brands and operators were missing out on due to 23% of consumers saying they defaulted to tap water in hospitality venues when not drinking alcohol.

In 2026 it's down to 19% - which suggests that the industry is finally starting to realise some of this missed opportunity and is **clawing back approx £140m a year.**



% who would choose tap water when wanting a 'non-alcoholic' drink in a pub, bar or restaurant



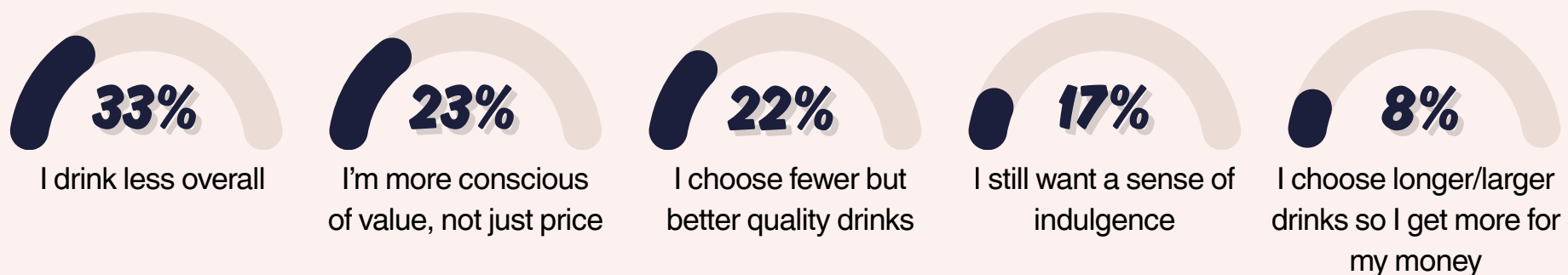


BEHAVIOUR IN HOSPITALITY VENUES

DRINK CHOICES ARE BECOMING MORE MEASURED

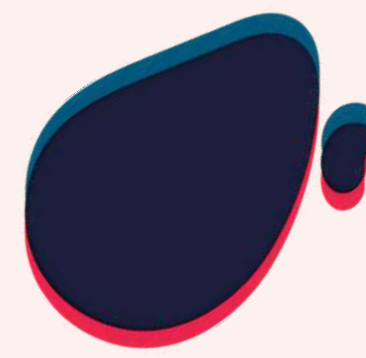
70% of UK adults say that cost pressures have changed their behaviour when visiting pubs, bars and restaurants, compared to 12 months ago.

Which of the following best reflects how cost pressures have changed your behaviour when visiting pubs, bars and restaurants, compared to 12 months ago?



Behaviours are becoming more measured, with many people drinking less but thinking more about what they choose. Value is not just about price alone, there is a clear move towards quality as people opt for fewer drinks, but better ones, while still holding onto a sense of occasion and indulgence. Cutting back does not mean cutting out the experience. Every drink needs to earn its place, delivering on quality, experience and perceived worth.





BEHAVIOUR IN HOSPITALITY VENUES

GUESTS PRIORITISE QUALITY OVER PRICE FOR LOW AND NO

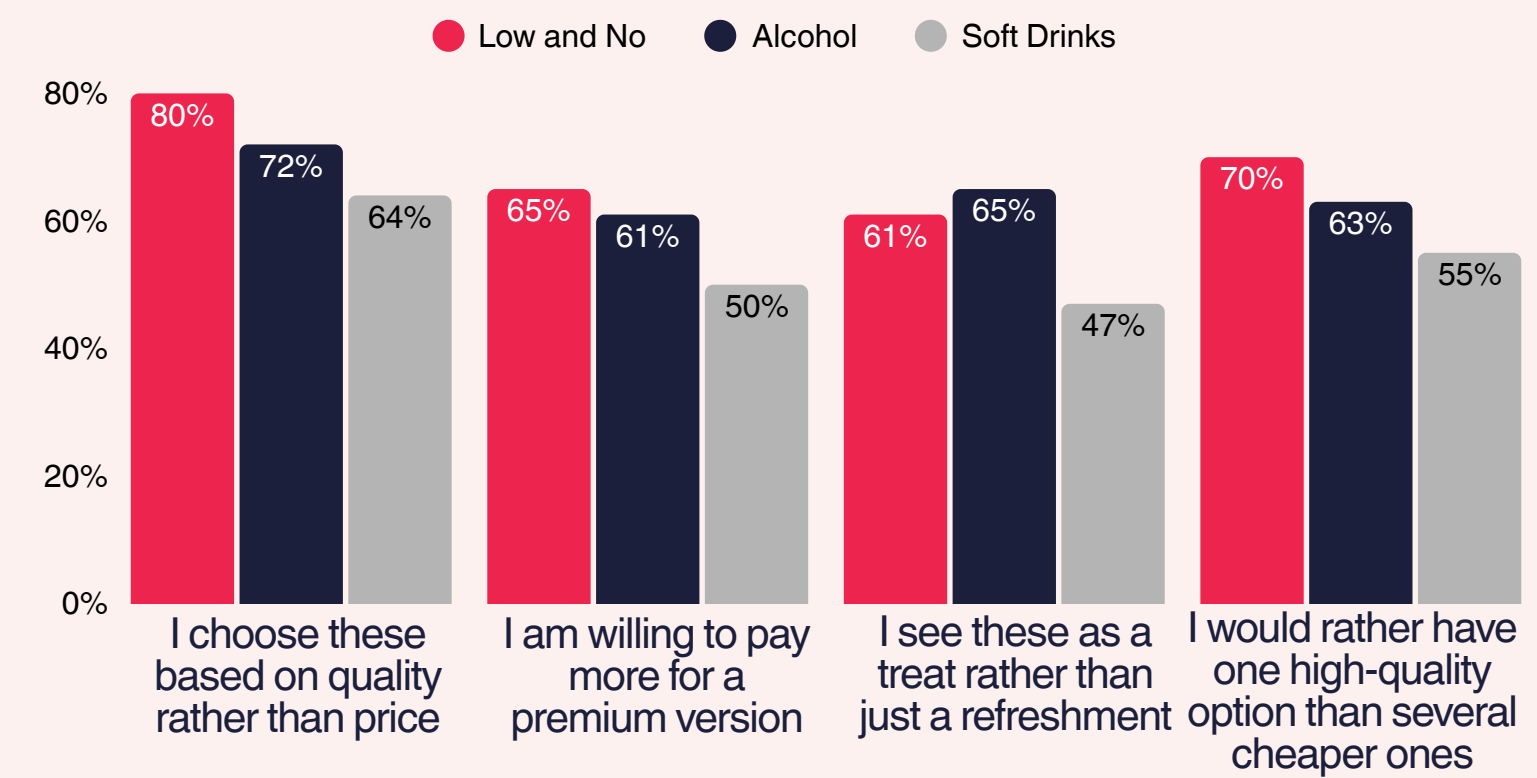
When choosing a low and no alcohol drink, consumers are VERY willing to pay more for...

- 49%** Better taste
- 38%** A drink that feels like a treat
- 29%** Premium branding
- 28%** Craft or specialist production

Guests are prioritising quality over price across low and no, alcoholic and soft drinks alike. Taste leads in importance, but experience and perception also carry weight. Importantly, Low and no is now being judged by the same standards as every other category behind the bar.

With this increase in importance comes a shift in expectation. A single, middle-ground offer is no longer enough as we look for a spectrum of choice, from accessible to premium, depending on the occasion. The category is maturing so it needs to reflect the same good, better, best structure that already exists elsewhere on the menu.

When choosing the following drinks in pubs, bars or restaurants, what are category consumers doing (% who agree/strongly agree with each statement):

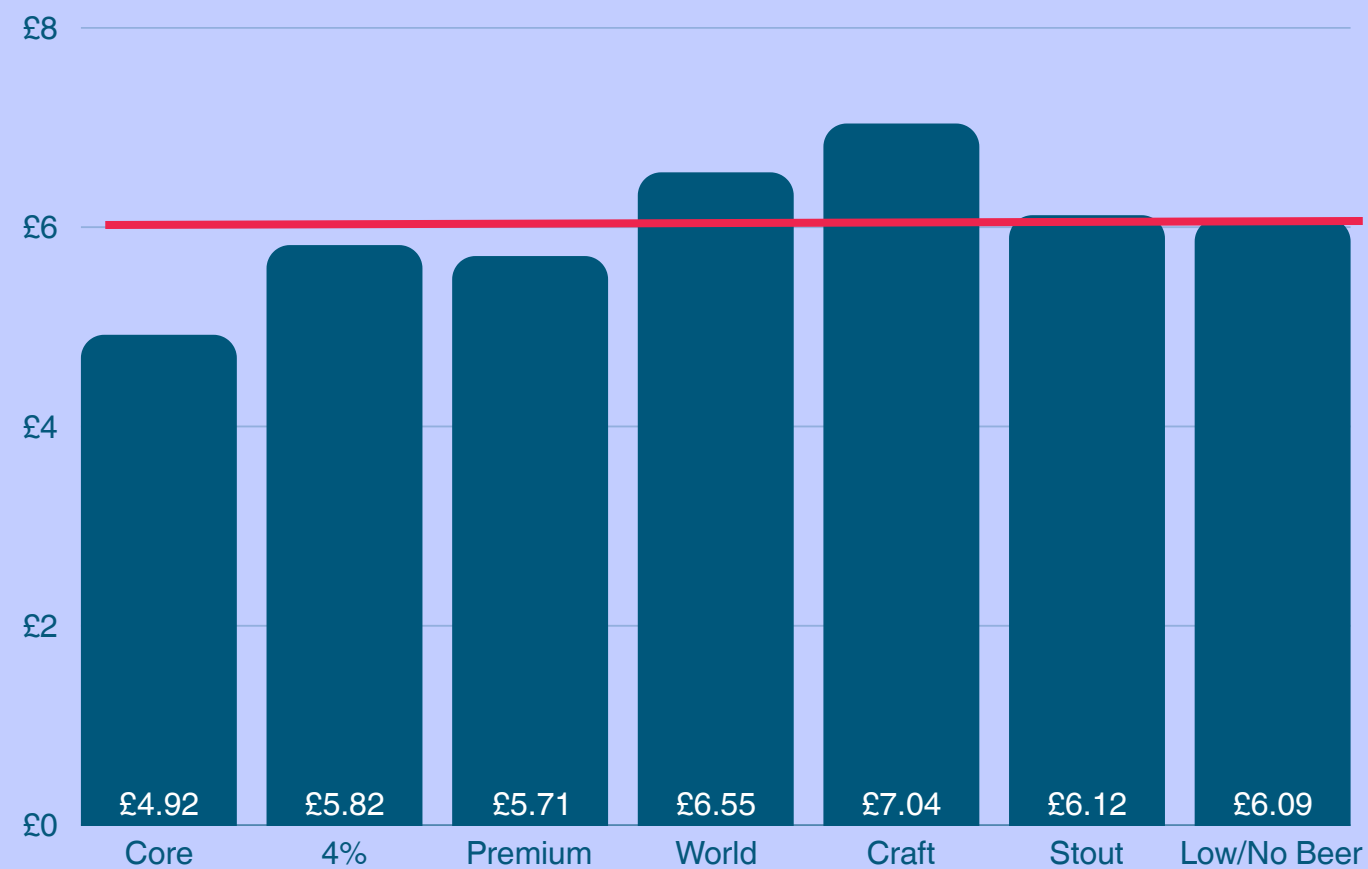


CASE STUDY: LOW AND NO DRAUGHT BEER PRICING

OXFORD
PARTNERSHIP

MARKET WATCH™

Low and no beer is showing that moderation and premiumisation can coexist. The category is opening up a significant new revenue stream for hospitality operators. Low and no draught beer has a higher price point, on average, than several alcoholic lager segments.



This Oxford Partnership report combines live trade data from Oxford Market Watch featuring c10k On Trade venues with flow meters across the entire draught range, Pricing data from c8k venues across the UK, mobile trace data from 58m devices overlaid across the UK On Trade c96k venues (NABLAB = No alcohol beer / low alcohol beer)



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BEHAVIOUR IN HOSPITALITY VENUES

IN-VENUE MODERATION TACTICS ARE INCREASINGLY WIDESPREAD

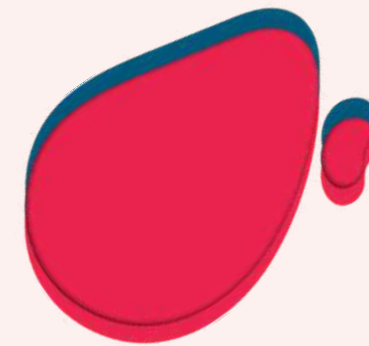
There is a growing use of “defined” tactics to moderate alcohol consumption in venues, this shows increasing awareness and confidence in how people are managing their drinking. These are repeatable patterns of behaviour that people are using to stay in control across an occasion. Low and no sits at the centre of these behaviours, playing a consistent role throughout rather than being confined to a single moment.

Older guests prefer to drink less overall, drink smaller measures or abstain, whereas younger guests are more likely to drink only low and no or moderate by switching between low and no or mid-strength on the same occasion.

% who currently adopt the following tactics to moderate alcohol intake, when visiting pubs, bars and restaurants:

● 2025 ● 2026





BEHAVIOUR IN HOSPITALITY VENUES 'ZEBRA STRIPING' IS ON THE RISE

"Zebra striping - alternating between low and no drinks and alcoholic drinks on the same occasion"



Zebra Striping is an increasingly popular moderation tactic, rising sharply among younger consumers. Many are doing it more often than they were a year ago. For some it is a pre-planned way to managed their alcohol in-take and the flow of an occasion, others are adjusting as the occasion unfolds or without consciously thinking about it at all. Younger guests are more likely to plan for it, whilst the older generations are more likely to do it without thinking, reflecting a more fluid approach to drinking, where balance is managed in real time.

45%

say they have ever "Zebra Striped" this number was just 34% in 2025

30%

of those who 'zebra stripe' say they are doing it **more** frequently this year

Of those who 'zebra stripe'...

28% ACTIVELY PLAN TO ZEBRA STRIPE

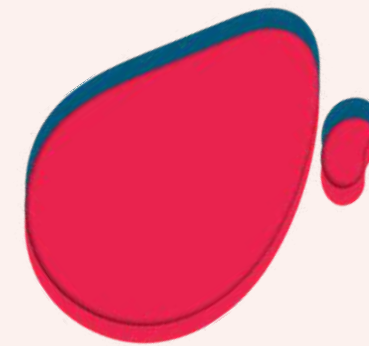


44% DECIDE AS THE OCCASION UNFOLDS



20% ZEBRA STRIPE WITHOUT THINKING





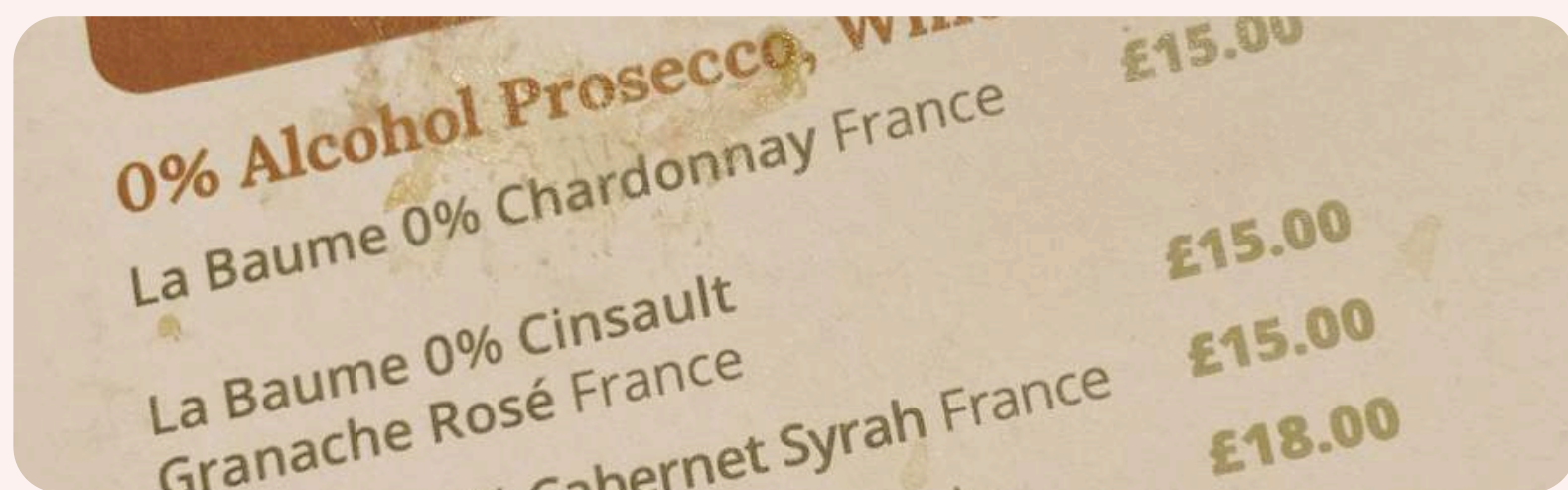
BEHAVIOUR IN HOSPITALITY VENUES

ZEBRA STRIPING CAN INCREASE DWELL TIME

36% of Zebra Strippers say that they do it to extend their social occasion AND moderate their drinking

50% of UK adults who watch sports in pubs/bars say that having alcohol-free beer would make it easier to stay and watch a major sporting event that finishes late on a work night

33% of UK adults say that if they could switch to a low and no drink, then they would be happy to stay longer

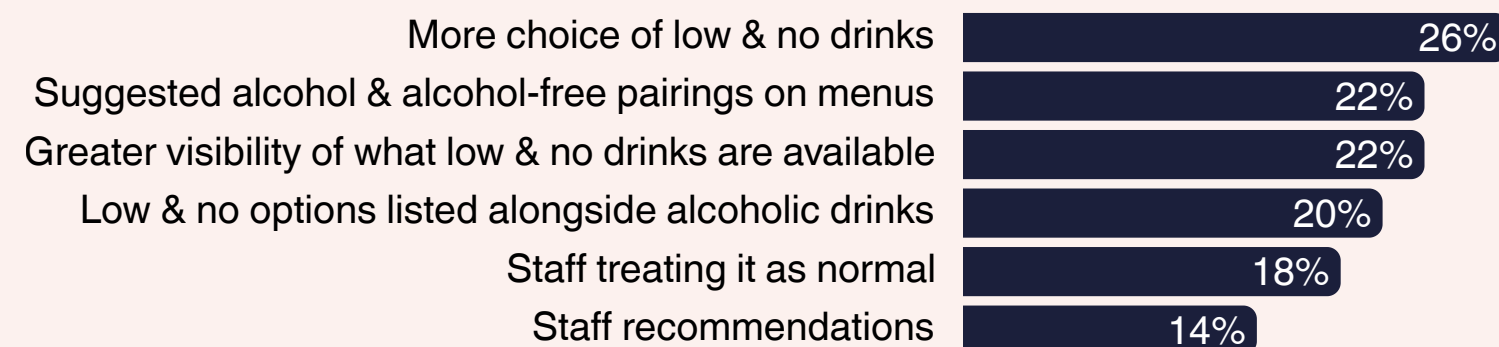


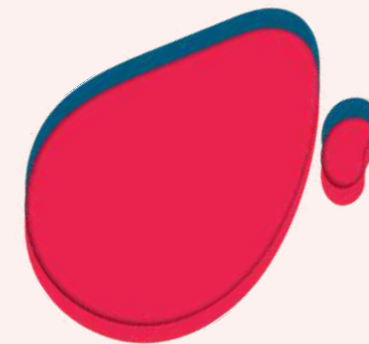
62% of UK adults say that venues could influence them to Zebra Stripe more

The option to switch in between low and no and alcohol can keep consumers in venue for longer. Greater choice, better visibility and simple integration into menus all make it easier for consumers to alternate alcohol and alcohol-free without friction.

Execution matters, so listing low and no alongside alcoholic drinks, offering pairings and ensuring staff treat it as a normal choice, all help enable the behaviour. The more seamlessly low and no fits into the experience, the more naturally it becomes part of how people drink.

The top ways for venues to influence Zebra striping:





BEHAVIOUR IN HOSPITALITY VENUES

SAY HELLO TO 'STEALTH DRINKING'... SOCIAL DYNAMICS STILL SHAPE BEHAVIOURS

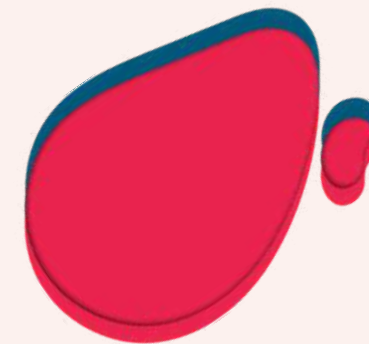
'Stealth Drinking' describes the practice of consumers choosing alcohol-free versions of drinks without signalling it to others. The serve looks the same, but the intention is private. Social dynamics are driving this behaviour, with nearly a third still feeling uncomfortable ordering alcohol-free options in group settings.

Confidence increases slightly when others are making similar choices, showing how visible behaviour influences acceptance. **Low and no is now widely consumed, but still not always openly expressed.**

31% of low and no consumers still don't feel comfortable ordering an alcohol-free version of an alcoholic drink when out in a pub, bar or restaurant. This is similar for all ages and genders

4-IN-10 UK adults have ordered a low and no drink *without letting others know* that it is low or no. This is as high for 25-34s and declines as age increases





BEHAVIOUR IN HOSPITALITY VENUES

WHEN AND WHY ARE 'STEALTH DRINKING' HAPPENING

'Stealth Drinking' occurs most in group settings where alcohol is the norm. Nights out with friends, work occasions and meeting new people all drive higher levels of discreet low and no consumption. This behaviour is allowing consumers to stay aligned with the group without drawing focus to their decision.

When....

51% When out with friends who are drinking alcohol

37% When out with work colleagues

35% When meeting new people

27% When staying out late

24% On early drinks at the start of a night

17% When watching live sport

Situations when people would order a low and no drink without letting others know it was low and no.

Why....

37% I don't want to explain why I'm not drinking alcohol

34% I don't want to draw attention to my drink choice

28% I want to feel part of the group

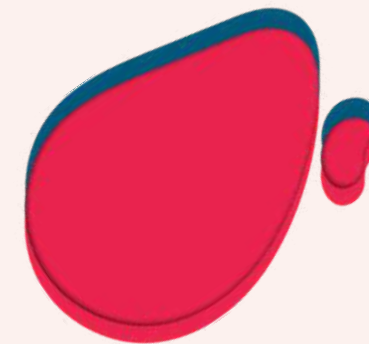
25% I still want the experience to feel "normal"

24% I don't want to disrupt the mood

22% I'm just trying to moderate quietly

18% I don't want people to treat me differently

Reasons people would order a low and no drink without letting others know it was low and no.

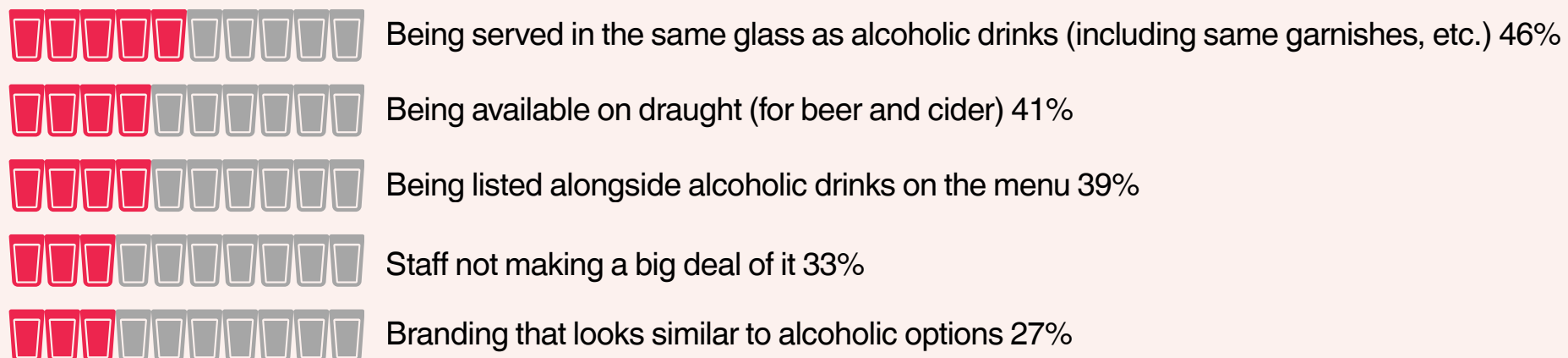


BEHAVIOUR IN HOSPITALITY VENUES

BREAKING DOWN THE BARRIERS AND MAKING 'STEALTH DRINKING' EASIER

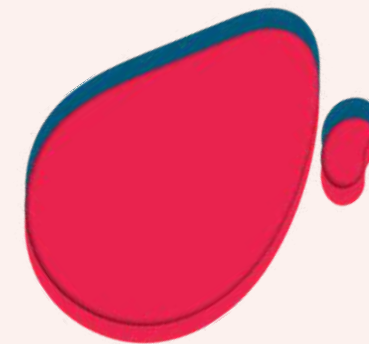
Small details in serve, range and presentation play a critical role in making low and no feel fully integrated into the occasion. Building acceptance is an important part of making venues inclusive to all, where all drink choices feel natural, visible or not.

Which of the following make it easier to order a low or no drink 'under the radar'?



46% of consumers who have ordered a 'stealth drink' say that being able to order drinks 'under the radar' makes it more likely they would still go out and socialise at pubs, bars and restaurants. (This rises to **58%** for 25-34s.)



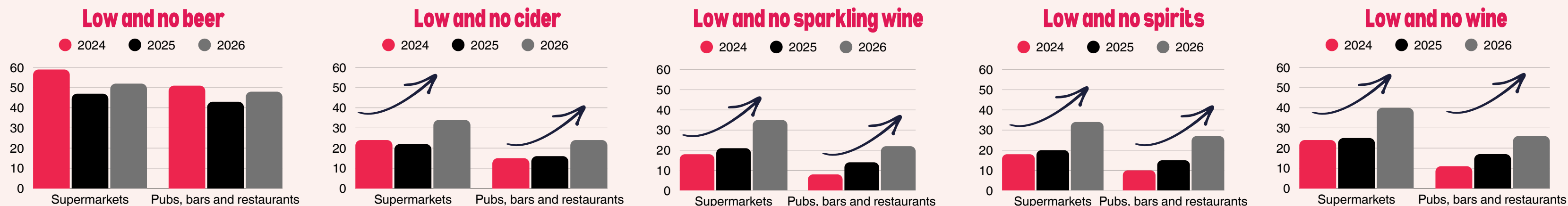


BEHAVIOUR IN HOSPITALITY VENUES

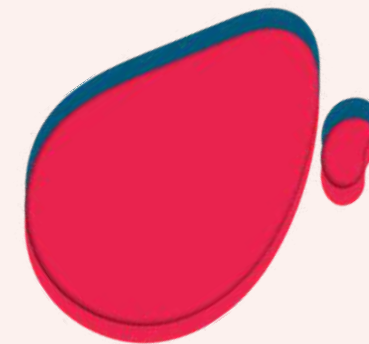
SATISFACTION OF LOW AND NO RANGE IS IMPROVING

Satisfaction with low and no ranges is improving, but expectations are rising faster.

Across both retail and hospitality, perceptions of choice have strengthened. Categories like wine, spirits and cider are seeing notable gains, reflecting broader investment, better quality options and growing consumer interest. The gap between the two channels remains tight. Supermarkets still lead, but pubs and bars are catching up, especially now consumers expect more than a single token option. As consumers start to explore more, so their expectations are likely to evolve- and rise.



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



BEHAVIOUR IN HOSPITALITY VENUES

OPPORTUNITIES EXIST TO BETTER MEET LOW AND NO EXPECTATIONS

14%

of UK adults have left a venue disappointed as a result of poor low and no options available in the last 3 months

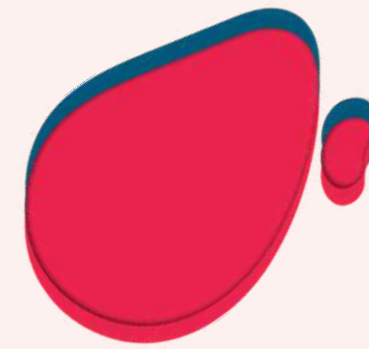
9%

of UK adults have left a venue early because of poor alcohol-free options in the last 3 months

This signals a clear opportunity for the low and no category as the expectations and sophistication of the consumer has evolved, it would suggest that some venues are not keeping up at the same fast pace, especially as these figures have not improved over the last three years. The risk is tangible as when expectations are not met, it directly impacts dwell time, spend and return visits.



BEHAVIOUR IN HOSPITALITY VENUES SUMMARY



In-venue moderation tactics are repeatable patterns of behaviour that many UK adults are using to stay in control across a social occasion. Low and no sits at the centre of these behaviours, playing a consistent role throughout rather than being confined to a single moment. Also, the growing use of defined tactics signals increasing awareness and confidence in how people are managing their drinking.

The low and no category is growing, people want to drink it (but don't always want to say so!) therefore hospitality venues need to be aware of stealth zebras and other tactics... and be able to cater for them accordingly!

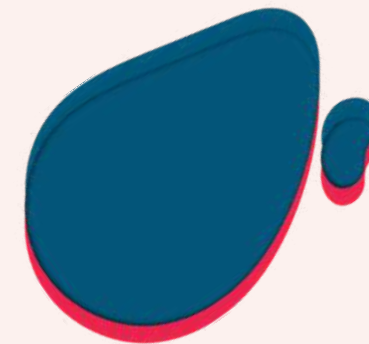
Low and no needs to be treated as a driver for growth and not a supporting category. Visibility, range and ease of navigation are no longer nice to have, they directly influence what gets ordered.

For venues, this means moving beyond a limited, static offer. Low and no should be ranged, signposted and integrated into menus in a way that drives discovery. For brands, it means building presence across multiple touchpoints, not relying on one channel to do the work. The prize is clear - get it right and you shape choice, get it wrong and the customer looks elsewhere.

DRINKING DIFFERENTLY: THE WIDER ROLE OF LOW AND NO IN HOSPITALITY

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THE WIDER ROLE OF LOW AND NO IN HOSPITALITY CREATING A WELCOMING ENVIRONMENT FOR ALL

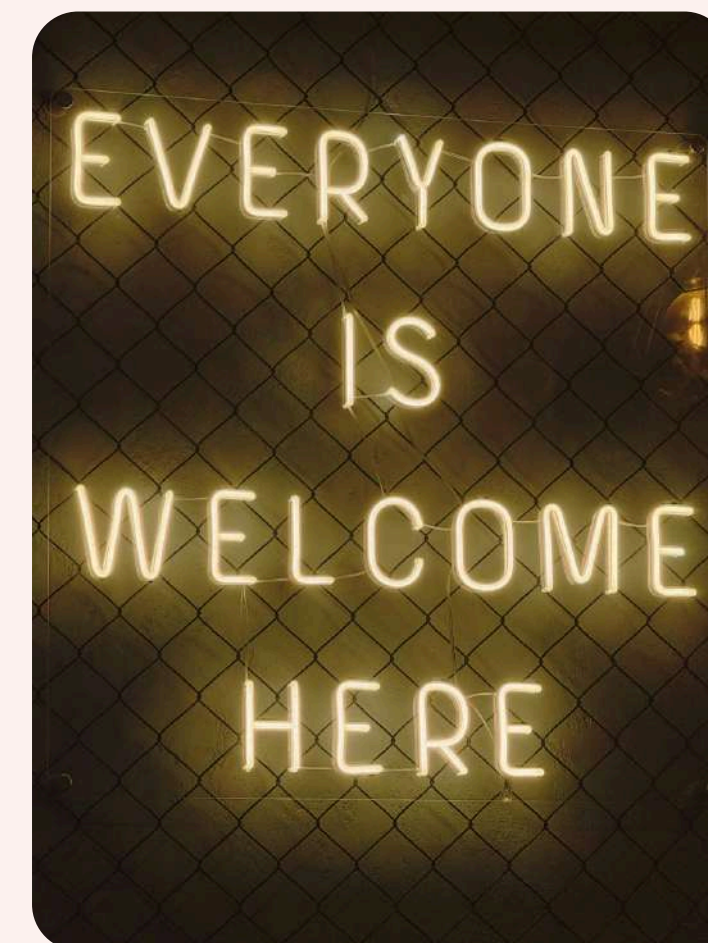
Low and no is helping redefine the role of hospitality, making it more accessible across a wider range of occasions, needs and lifestyles. Expectations have shifted as going out is no longer tied intrinsically to drinking alcohol.

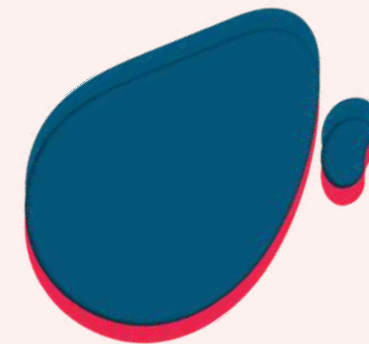
Low and no is a critical part of the picture that enables more people to feel considered, comfortable and able to participate in social experiences.

63% of UK adults agree that having good low and no options makes pubs, bars and restaurants feel more welcoming

52% agree that low and no availability makes it easier for them to say yes to social plans if they're trying to reduce alcohol consumption or not drink alcohol on that occasion

60% agree that pubs, bars and restaurants now feel a suitable choice even if they're trying to reduce alcohol consumption or not want to drink alcohol on that particular occasion





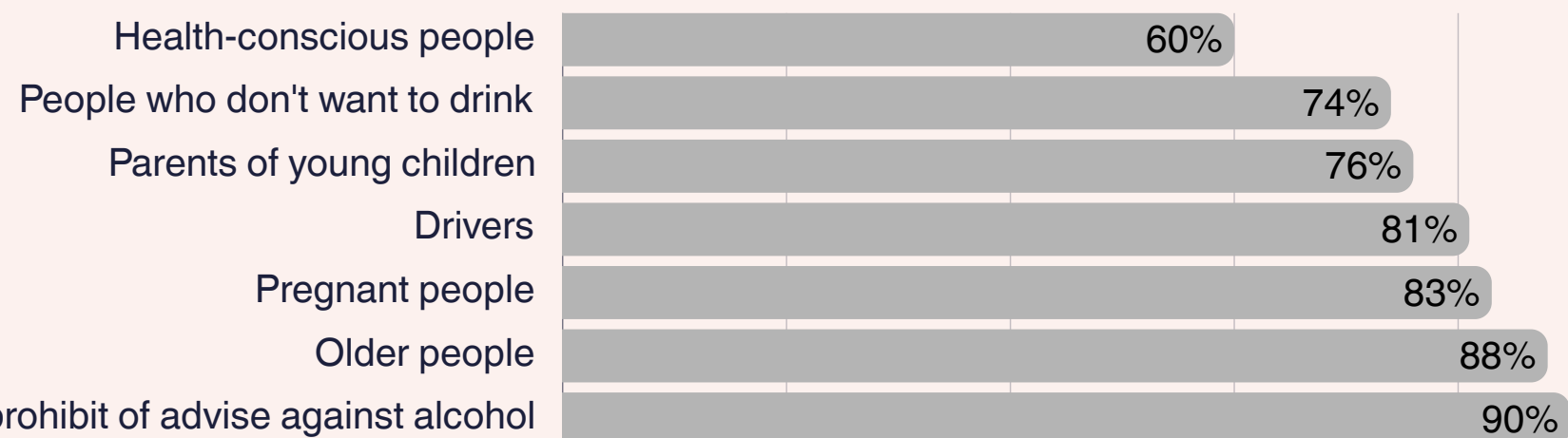
THE WIDER ROLE OF LOW AND NO IN HOSPITALITY

LOW AND NO IS KEY TO AN INCLUSIVE VENUE

Low and no has a key role to play in widening the definition of who hospitality venues are for. From drivers and parents to older consumers and those guided by religion or health, there is strong agreement that better low and no options make venues feel more inclusive. For many of these groups, it is a decisive factor of where they spend their money.

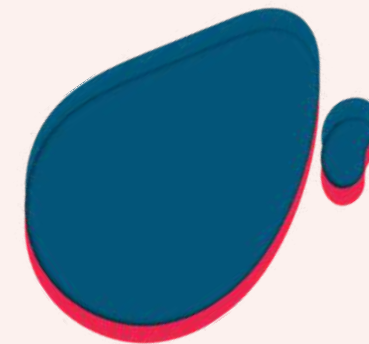
Alcohol is no longer at the core of many social occasions and the best venues are recognising that by offering a diverse range of food, drink and activities in-line with this. Pubs in particular are offering more activity-led reasons to visit such as The Lucky Saint pub in London hosting a “Pints and Ponytails” workshop encouraging connection between dads, that isn’t centred around alcohol.

% who think low and no alcohol options make pubs, bars and restaurants feel more inclusive for them:



“PINTS AND PONYTAILS” CAMPAIGN





THE WIDER ROLE OF LOW AND NO IN HOSPITALITY

LOW AND NO SUPPORTS EVOLVING SOCIALISING HABITS

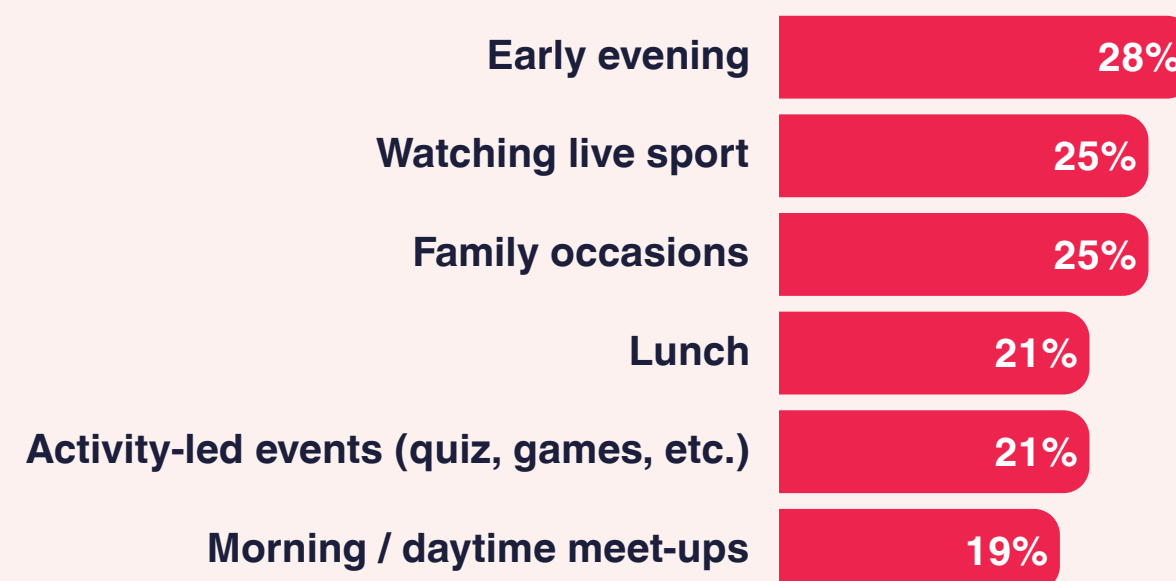
38% of UK adults are actively choosing to go out to pubs, bars and restaurants earlier in the day than before

45% are choosing more activity/experience-led activities when they go out rather than occasions that are just focussed on drinking

Many UK adults are shifting their use of pubs, bars and restaurants into earlier day parts. Early evenings, daytime meet-ups and activity-led experiences are all seeing increased engagement, supported by the improved availability of low and no options.

Hospitality visits are becoming more experience-led, with less emphasis on drinking as the central focus. Low and no plays a critical role in enabling this change, helping venues stay relevant across more moments in the day and creating new reasons for consumers to visit beyond traditional drinking occasions.

% UK adults who are more likely to visit pubs, bars or restaurants for the following occasions as a direct result of more low and no options being available:



CASE STUDY: KEY TAKEOUTS FOR WINNING THE WEEKDAY MODERATION OCCASION

OXFORD
PARTNERSHIP

MARKET WATCH™

By creating new Monday-to-Thursday occasions alongside existing weekend occasions, the low and no category is opening up a significant new revenue stream for hospitality operators.

- For low and no beer, average pints sold spike after work on weekdays, while weekends are driven by a strong lunchtime peak
- Tuesday to Thursday 18:00–21:00 saw the strongest growth in low and no beer (YoY)

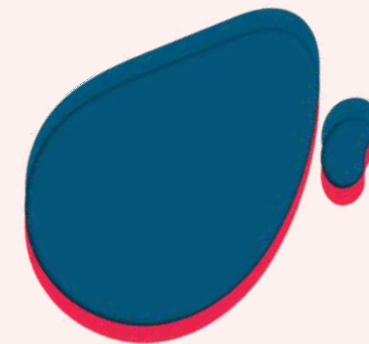
Top tips for operators:

- Make low and no highly visible with eye-level placement and clear font signage
- Merchandise the low and no beer alongside premium lager to signify quality positioning
- Focus activations from 5-8pm with targeted staff prompting
- Build Monday - Thursday occasions with loyalty and event planning
- Target office workers and after-work groups as the primary consumer



This Oxford Partnership report combines live trade data from Oxford Market Watch featuring c10k On Trade venues with flow meters across the entire draught range, Pricing data from c8k venues across the UK, mobile trace data from 58m devices overlaid across the UK On Trade c96k venues

LOW+NO
KAM LUCKY SAINT 2026



THE WIDER ROLE OF LOW AND NO IN HOSPITALITY

THE VALUE OF LOW AND NO FOR HOSPITALITY

Commercial benefits:

- Increases dwell time: groups are less likely to leave when some members have finished drinking alcohol.
- Keeps mixed groups together, everyone can participate
- Encourages additional visit occasions, e.g. customers may be more willing to visit on weekdays, lunch occasions, or early evenings.
- Supports family dining occasions as designated drivers can still enjoy a premium drink experience.
- Reduces barriers to visiting as consumers don't need to choose between socialising and avoiding alcohol.
- Low and no can increase total spend as premium low/no drinks often have higher prices than soft drinks and may also be ordered alongside food.
- As with vegetarian/vegan customers, the person in a group who is looking to drink low and no is the influencer for venue choice

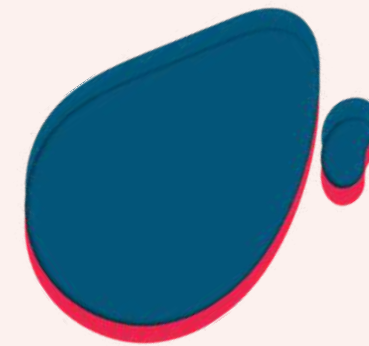
Strategic benefits

- Future-proofs businesses against long-term moderation trends.
- Broadens the addressable customer base.
- Enhances venue perception (modern and customer-focused)
- Supports ESG and wellbeing positioning.



THE WIDER ROLE OF LOW AND NO IN HOSPITALITY

SUMMARY



Hospitality is being redefined by broader, more flexible consumer needs. Venues that continue to centre their offer around alcohol, risk narrowing their relevance. People are looking for spaces that work across different moments and for different groups of people with mixed needs and expectations.

A credible low and no range plays a key role in unlocking this. It enables venues to serve wider audiences, extend into new dayparts and create experiences that are not dependent on alcohol to succeed.

Low and no isn't just changing what's in the glass, it's changing what pubs, bars and social spaces mean.



DRINKING DIFFERENTLY: TOP TAKE OUTS

KAM In partnership with: **LOW+NO
LUCKY SAINT 2026**



DRINKING DIFFERENTLY - LOW+NO 2026

TOP 10 TAKEOUTS



- 1. Drinking habits have stabilised but drinking behaviour has changed.** 84% of drinkers consume alcohol weekly (index 103 vs PY), but attitudes towards alcohol, health and socialising continue to evolve.
- 2. Brits are drinking more flexibly.** Alcohol is no longer the default choice, with consumers increasingly switching between alcoholic, low and no and other non-alcoholic drinks depending on the occasion, mood and desired outcome.
- 3. Consumers are building more flexible drinking repertoires.** 71% of alcohol drinkers now actively use strategies to shape what, when and how they drink, with younger consumers particularly likely to switch between alcoholic, low and no and other non-alcoholic options.
- 4. Health remains the dominant driver of change.** 84% cite health, diet or fitness-related motivations for drinking something other than alcohol. Meanwhile, 59% track health metrics and 81% of those have changed their drinking behaviour as a result.
- 5. Consumers increasingly choose drinks for outcomes.** Sleep, recovery, hydration and energy are becoming important decision drivers, while functional and alcohol-free drinks are increasingly viewed through a benefits lens rather than a category lens.

- 6. Low and no continues to attract and engage consumers.** 53% of UK adults now consume low and no monthly, while 60% of low and no consumers have tried a new low and no brand in the last year.
- 7. The on-trade is becoming increasingly important for low and No discovery.** 36% of consumers have purchased low and no in pubs and bars in the last three months, up from 25% in 2023.
- 8. Alcohol-free occasions are now a mainstream part of hospitality.** More than a third of pub and bar visits are alcohol-free, rising to 45% in restaurants.
- 9. Consumers are willing to pay for quality.** 80% of low and no drinkers prioritise quality over price and 65% are willing to pay more for a premium option.
- 10. The opportunity extends beyond abstainers.** 63% say good low and no options make venues feel more welcoming, yet 34% of low and no drinkers have left a venue or been disappointed by a poor alcohol-free range.

The future of drinks isn't alcohol versus alcohol-free, it's giving consumers the right drink for the right moment.

DRINKING DIFFERENTLY: LOW+NO 2026

CALLS TO ACTION FOR OPERATORS



- 1. Think beyond designated drivers:** More than a third of pub and bar visits are now completely alcohol-free, rising to 45% in restaurants. Alcohol-free occasions are increasingly being driven by lifestyle, health and personal preference rather than necessity alone.
- 2. The biggest opportunity may be sitting at your existing tables:** Many consumers are no longer choosing between alcohol and no alcohol. They are switching between both throughout the same occasion. Operators should think about how low and no fits across the entire guest journey, not just as an alternative at the start of it.
- 3. One beer and one spirit is no longer enough:** Consumption continues to grow across low and no beer, wine, spirits, sparkling wine, RTDs, cocktails and cider. Consumers are building broader repertoires and expect venues to reflect that choice. Today's guests are increasingly knowledgeable about the category and expect quality, variety and relevance but also open to trial.
- 4. Hospitality is becoming a discovery channel:** 36% of UK adults have purchased low and no in pubs and bars in the last three months, up from 25% in 2023. 60% of low and no consumers have tried a new brand in the last year. Venues are increasingly influencing which brands consumers discover and adopt.
- 5. Your menu may be creating barriers to purchase:** 31% of low and no consumers still don't feel comfortable ordering an alcohol-free version of an alcoholic drink in a pub, while 4 in 10 consumers have ordered a low and no drink without telling others. Visibility, language, staff training and menu design matter more than many operators realise.
- 6. Design for switching, not just choosing:** Increasingly, guests are moving between alcoholic, low and no and other non-alcoholic drinks within the same occasion, creating opportunities for operators to encourage multiple drink purchases rather than a single drink choice.
- 7. Rethink how you structure drinks menus:** Consumers are increasingly choosing drinks based on occasion, mood and desired outcomes rather than alcohol content alone. Operators should consider whether traditional alcohol versus alcohol-free menu structures still reflect how guests make decisions.
- 8. Low and no is now a guest experience issue:** 63% of consumers agree that good low and no options make pubs, bars and restaurants feel more welcoming. Increasingly, the quality of a venue's alcohol-free offer influences perceptions of the overall guest experience.
- 9. Think less about alcohol content and more about guest needs**
Consumers are increasingly choosing drinks based on the occasion, how they want to feel and what they are doing next. The most successful operators will design drinks ranges around guest needs rather than traditional category structures.

The opportunity is no longer to offer a substitution for alcohol- it's to win a greater share of modern drinking occasions.

DRINKING DIFFERENTLY: LOW+NO 2026 CALLS TO ACTION FOR DRINKS BRANDS



- 1. The category is still recruiting new consumers:** Low and no has not reached maturity. 53% of UK adults now consume low and no monthly and penetration continues to grow, demonstrating there is still significant headroom for recruitment.
- 2. Trial remains one of the category's biggest growth drivers:** 60% of low and no consumers have tried a new brand in the last 12 months. Consumers remain open to experimentation, creating opportunities for innovation, NPD and challenger brands.
- 3. Consumers are drinking across multiple low and no categories:** Increased numbers of consumers are increasingly engaging with low and no beer, wine, spirits, cider, RTDs and cocktails, with many drinking across multiple low and no categories, creating opportunities for brands to win across a broader range of occasions.
- 4. Hospitality has become a key discovery channel:** 36% of consumers have purchased low and no drinks in pubs and bars in the last three months, up from 25% in 2023. Increasingly, brands cannot rely on retail alone to drive awareness and trial.
- 5. Premium positioning is working:** 80% of consumers prioritise quality over price and 65% are willing to pay more for a premium low and no product. The category's future growth is likely to be driven by quality and experience rather than discounting.
- 6. Consumers are becoming more outcome-driven:** 47% say how they feel the next day influences their drink choices and 53% would be more likely to choose a low and no drink with an added functional benefit. Consumers are increasingly evaluating drinks based on what they deliver, not simply what they contain- marketing of low and no should reflect this
- 7. Health has become more visible:** 59% of consumers now track health metrics after drinking and 81% of those have changed their drinking behaviour as a result. Consumers increasingly see the impact of alcohol in real time, creating new opportunities for brands that align with health and wellbeing goals.
- 8. The category is competing with more than alcohol:** Many consumers enjoy a mix of alcoholic drinks, low and no drinks, soft drinks and functional beverages within their drinking repertoire and often enjoy on the same occasion. Brands should think beyond category competitors and focus on the needs they fulfil.
- 9. Poor visibility is costing sales in hospitality venues:** 34% of low and no consumers have left a venue or been disappointed due to poor alcohol-free options. Despite category growth, execution remains inconsistent and there is still a significant opportunity to improve visibility and availability.
- 10. The next phase of growth is about preference, not substitution:** The most successful brands will be those that consumers actively seek out and enjoy in their own right, rather than those that are simply chosen as an alternative to alcohol.

The brands that win will be those which consumers actively seek out, not simply those they substitute for alcohol.



THE KNOWLEDGE HUB

Get informed on the latest hospitality trends with the KAM Knowledge Hub. From in-depth trend reports and whitepapers to infographics, webinars and expert opinion, we deliver the data and trends you need to stay ahead - all in one place. One login, endless insights.

Scan the QR code for FREE standard access or upgrade to an 'Access All Areas' pass (£595/yr) for even more eye-opening data and insights!



The collage features the following content pieces:

- FAMILY DINING**: What families want from hospitality venues in 2022 and beyond. KAM logo.
- RAISING THE BAR**: How the UK On-Trade is failing to meet the demand for alcohol-free. Everleaf and KAM logos.
- LOW + NO**: DRINKING DIFFERENTLY 2025. In partnership with LUCKY SAINT. KAM logo.
- THE COMPETITIVE SOCIALISING CUSTOMER 2025**: Customer trends for activity-led venues. KAM logo.
- GENERATION Z ALL GROWN UP**. KAM logo.
- THE UK'S LARGEST HOSPITALITY SALARY SURVEY 2025**. UK KAM logo.
- Socialising Differently.**: How we socialise is evolving. How is it changing and what can we expect going forward... Presented at imbibe live. KAM logo.
- GOLDEN YEARS**. KAM logo.
- PUB ROADMAP**: CREATING PUB SUPERFANS. KAM, BII, and brakes logos.
- DRINK MID Strength**: THE MID STRENGTH OPPORTUNITY. UNDERSTANDING CONSUMER DEMAND AND TRADE POTENTIAL. DRINK MID, Club Soda, and KAM logos.
- State of Social**: THE BENCHMARK FOR HOSPITALITY SOCIAL METRICS. KAM x Kitch logo.
- wellbeing**: WELLBEING AT WORK: Where are we now? Katy Moses Founder/MD. KAM logo.
- PLAN TO PLATE.**: How hospitality brands and operators can understand, engage and influence the customer journey. KAM logo.
- PUB ROADMAP.**: EVOLVING PUB BUSINESSES. KAM, BII, hdi, brakes, and BRISTON logos.
- People & productivity insights**: What's stopping your people from being productive in 2023. Sona and KAM logos.

ABOUT US....



KAM is a specialist hospitality, food and drink insight consultancy that helps operators, suppliers and investors better understand their customers and make smarter commercial decisions.

Through insight-led consultancy, bespoke consumer research and market intelligence, KAM helps clients identify opportunities, improve performance and respond to changing consumer behaviour.

Alongside its bespoke consultancy work, KAM publishes industry-leading sector reports and hosts events that bring together senior leaders from across hospitality, food and drink.

Visit www.kaminsight.com

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Email hello@kaminsight.com



Founded in 2018, Lucky Saint was driven by the mission to finally reward those not drinking with the beer they deserve, and continues to lead the way in changing perceptions of alcohol-free beer.

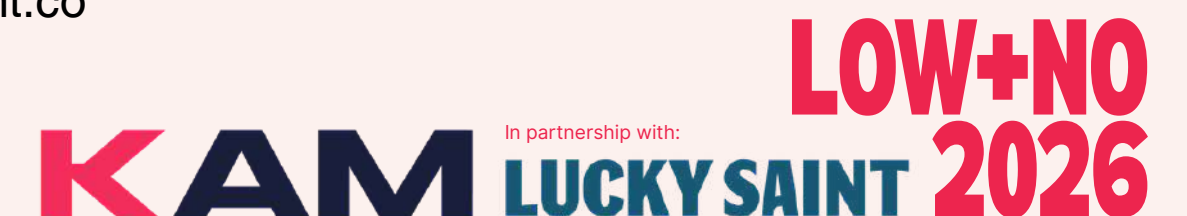
Lucky Saint is the UK's #1 dedicated alcohol-free beer brand, and the UK's #4 alcohol-free beer brand. Lucky Saint is now available in 10,000+ of the best pubs, bars, and restaurants in the UK, 1,300 pubs on draught, major supermarkets across the UK, and over 85 Michelin star venues.

Its range includes the Superior Unfiltered Lager, Hazy IPA, Superior Lemon Lager, Superior German Weissbier and Lime & Sea Salt Lager.

Visit luckysaint.co

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Email hello@luckysaint.co



DRINKING DIFFERENTLY

LOW+NO 2026



KAM In partnership with:
LUCKY SAINT

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CAN YOU FIND?



STEALTH PINTS



STEALTH ZEBRAS



QUIZ NIGHT
TUESDAYS
8PM

CRAFT BEERS	
PALE ALE	4.2%
IPA	5.4%
STOUT	4.8%
HEFEWEIZEN	5.0%
LAGER	4.1%

LIVE
FRIDAY
SATURDAY
9PM