

Alcohol-free and low-alcohol drinks in the UK: Trends, barriers, and opportunities

Background and aims

Alcohol-free and low-alcohol drinks are no longer niche. While young, affluent, and low-risk drinkers are driving their popularity, these products are increasingly reaching risky drinkers, those who drink above the Chief Medical Officers' low-risk guidelines. Their greatest potential for harm reduction lies in this shift; when these drinks replace, rather supplement, regular-strength alcohol.

This report explores who is using these drinks to moderate, how these habits have changed over time and what their use reveals about shifting drinking behaviours and cultural change in the UK.

Findings

- In the UK, moderating alcohol use with alcohol-free and low-alcohol drinks is growing in popularity, with 44% of UK drinkers using at least one of these products to moderate their drinking in 2025 (up from 31% in 2018).
- Alcohol-free drinks, in particular, have grown in use, with 31% of UK drinkers now moderating with these products (up from 18% in 2018). Moderation with low-alcohol products rose from 25% to 33%.
- Young, affluent, and low-risk drinkers currently lead this trend, but significant increases are also emerging among men and risky drinkers, whose use of these products has increased from 28% to 43% and 23% to 40%, respectively, between 2018 and 2025.
- Use of alcohol-free drinks among risky drinkers, in particular, has more than tripled from 7% to 23% between 2018 and 2025.
- While a small proportion of risky drinkers (9%) consume alcohol-free and low-alcohol drinks alongside regular alcohol, most (59%) use them as replacements rather than additions, highlighting their potential role in supporting moderation.
- Drinkers from less affluent backgrounds have only seen modest increases in uptake of both alcohol-free and low-alcohol drinks, increasing from 32% in 2018 to 40% in 2025, raising concerns of widening health inequalities.
- The most common reasons for drinking alcohol-free or low-alcohol products include needing to drive soon afterwards, curiosity, being in a situation where they couldn't or didn't want to drink alcohol, and the appeal of their similarity in taste to alcoholic drinks. The main barriers include a preference for soft drinks when not drinking, a lack of perceived need to cut back, a preference for conventional alcohol, and concerns about taste.

Conclusions

Overall, the role of alcohol-free and low-alcohol products in supporting moderation among drinkers is moving in the right direction. While young, affluent, and low-risk drinkers are leading the way, rising use among men and risky drinkers signals new opportunities for harm reduction, if these products replace, rather than supplement, regular-strength alcohol.

This shift has the potential to help bridge the gap between awareness of harmful drinking and practical strategies to reduce consumption, especially if risky drinkers are actively supported with affordable, accessible and appealing alternatives.

Policymakers, producers, and retailers have a window of opportunity to support and accelerate this shift by expanding shelf space in supermarkets, ensuring inclusive product ranges in on-trade venues, and designing campaigns that encourage their uptake among risky drinkers as substitutes, by tapping into their reasons for use.

Data

This report draws on data from the Drinkaware Monitor series, which is carried out by YouGov. Data are weighted by sex, age, region, and social grade to be representative of the UK adult population. Any differences reported between groups in this report are statistically significant at least a confidence level of 95% (i.e., $p < 0.05$) unless otherwise stated. More information on the survey and methodology of each Drinkaware Monitor can be found on our website.

Introduction

Alcohol misuse remains a leading cause of premature death and preventable illness in the UK.¹ Each year, approximately 10,000 deaths are directly attributable to alcohol and around one in five drinkers (18%) exceed the Chief Medical Officers' low-risk drinking guidelines of 14 units per week – an estimated 8.2 million adults.^{2,3,4} Despite this, Drinkaware Monitor data show declines in drinking frequency, binge drinking and weekly unit consumption, reflecting a shift towards more moderation across parts of the population.

Around 9 in 10 UK drinkers (87%) moderate their alcohol intake to some extent; rising from 84% in 2018. Women are slightly more likely to moderate than men (89% vs 85%), and younger drinkers aged 18 to 34 report higher rates of moderation than those aged 55 and over (89% vs 84%). Common motivations for moderation include improving health, avoiding hangovers, reducing long-term health risks, and saving money. The most widely used moderation strategies, according to Drinkaware Monitor data, include taking drink-free days, avoiding alcohol on school or work nights, and staying within the low risk guidelines.

Among the clearest signs of this behavioural shift is the growing use of alcohol-free and low-alcohol drinks. Alcohol-free products typically contain no more than 0.05% alcohol, while low-alcohol products contain up to 1.2%.⁵ The availability and quality of these products has improved significantly in recent years, with retail value and volume sales more than doubling between 2019 and 2024.⁶ The UK market is estimated to be worth £380 million; still a small fraction of the overall alcohol market, which was valued at £50 billion in 2023.^{6,7}

While the growth of this category signals a positive shift, its potential to reduce alcohol-related harm will only be realised if they are more widely adopted, and increasingly used, as alternatives to regular-strength alcoholic drinks, particularly among drinkers drinking over the low risk guidelines.

However, the harm reduction potential of these drinks is a subject of ongoing debate.^{8,9} On one hand, replacing regular-strength alcoholic drinks with alcohol-free and low-alcohol alternatives offers a practical way to reduce alcohol consumption and associated health risks, including liver disease, cancer, and cardiovascular disease.¹⁰ Even modest reductions in average drink strength, such as 10%,¹¹ can result in meaningful reductions in alcohol-attributable deaths. Crucially, these products offer a way to moderate without giving up the rituals, settings, and social aspects of drinking that other moderation strategies often fail to replicate and can make change difficult.¹²

At the same time, concerns remain. Alcohol-free and low-alcohol drinks may reinforce the normalisation of alcohol in everyday life, or be consumed alongside regular-strength alcohol, limiting their harm reduction potential.^{13,14,15}

There are also concerns around their appeal to young people, their appropriateness for pregnant women and individuals with alcohol dependence, for whom even small amounts of alcohol or alcohol-related cues may pose risks.^{16,17,18} These issues are currently being examined through the National Institute for Health Research (NIHR)-funded 'No/Lo Project' (NIHR135310), led by the University of Sheffield.¹⁹

These products are becoming an increasingly significant part of the UK's drinking landscape, with their expansion reflected in the 2025 NHS 10-year plan.²⁰ The UK government has signalled further support for this category, with proposals to consult on raising the upper strength of these products to align with international standards, and to introduce sales restrictions to under-18s.¹⁷ Given this momentum, there is now a timely opportunity to improve understanding of how this category can best contribute to alcohol harm reduction.

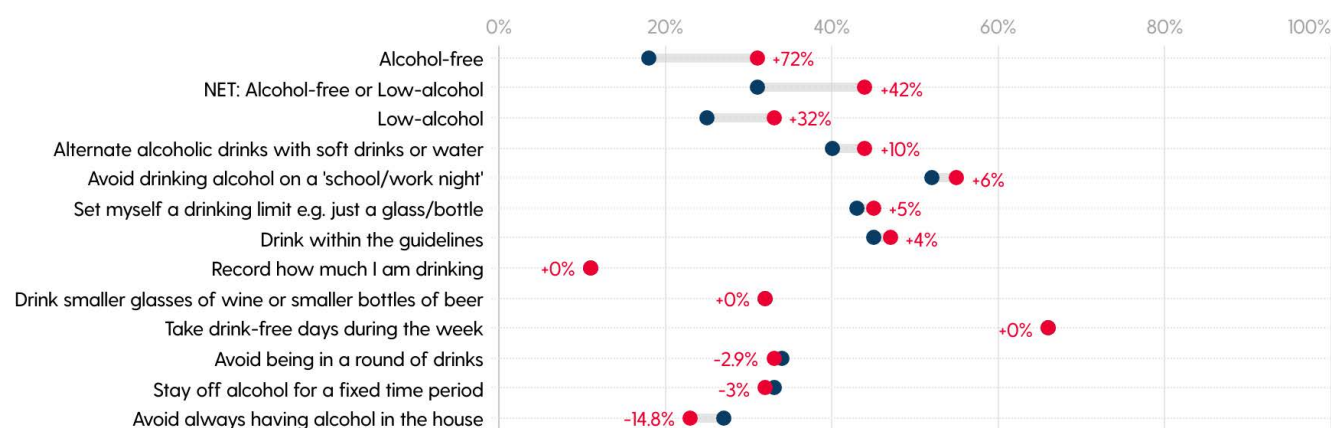
This report draws on data from the Drinkaware Monitor series and wider research to uncover who is moderating with alcohol-free and low-alcohol drinks, how these habits have evolved since 2018 and what they reveal about shifting drinking behaviours and cultural change in the UK.

The rise of alcohol free and low-alcohol drinks

The use of alcohol-free and low-alcohol drinks as moderation strategy has risen 42% since 2018; faster than any other approach in the UK (see **Figure 1**). By 2025, 44% of drinkers reported moderating with at least one of these products (up from 31% in 2018), marking the largest increase of any moderation technique during this period.

Figure 1. Alcohol-free & low-alcohol products are the fastest growing moderation methods in the UK between 2018 and 2025

Proportion of drinkers using each moderation method in 2018 and 2025, with % change over time reported.



Source: The Drinkaware Monitor. All adults who drink alcohol. 2018 (7,902); 2025 (n=6,074)

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Positively, it appears that the majority (64%) of users typically drink these products instead of regular-strength alcoholic drinks, while one quarter (23%) sometimes drink them as a replacement or as an addition depending on the situation. Key motivations for choosing these products include improving health, curiosity, taste, a desire to reduce alcohol intake, and practical reasons such as the need to drive.^{21, 22}

The most significant growth within this category has come from alcohol-free options, which has increased 72% since 2018; from 18% to 31%. Low-alcohol drinks have also experienced steady growth, up by almost one-third (32%); from 25% to 33% over the same period.

Notably, this growth appears to be accelerating. One in three (28%) current users say they started using alcohol-free and low-alcohol drinks as a moderation tool in the last two to three months – a marked increase from 22% in 2018. These trends align with market projections, with volume sales associated with this category expected to grow at 7% annually between 2024 and 2028.²³

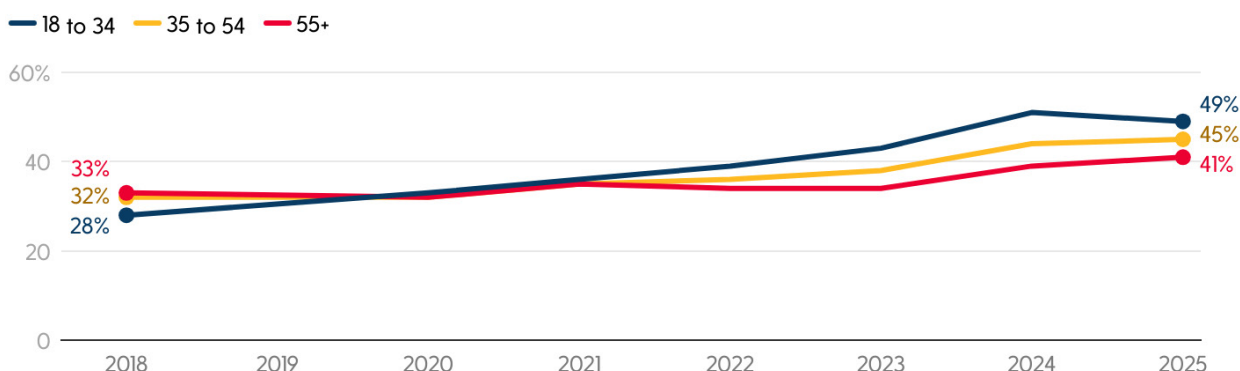
Young, affluent, and low-risk drinkers are leading the way

The growth of alcohol-free and low-alcohol drinks in the UK is being led by young, affluent, and low-risk drinkers. Market insight reports consistently highlight younger adults as the key drivers of growth, and this extends to their use for moderation.^{18, 19, 24}

Among young adults aged 18 to 34, moderation with alcohol-free and low-alcohol drinks has increased significantly, from 28% in 2018 to 49% in 2025; the largest increase of any age group (see **Figure 2**).

Figure 2. Younger drinkers have seen the largest increase in Alcohol-Free/Lower Strength use since 2018

% of drinkers who moderate with alcohol-free or lower strength products, by age group, 2018-2025



Note 1. Alcohol free and lower strength usage was not recorded in the 2019 edition of the Drinkaware Monitor

Source: The Drinkaware Monitor: UK drinkers who moderate with alcohol-free or lower strength products. 2018 (n=2,465), 2020 (n=2,488), 2021 (n=2,811), 2022 (n=1,947), 2023 (n=3,389), 2024 (n=1,868); 2025 (n=2,648)

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Use of alcohol-free drinks in particular has doubled, from 16% to 34%. Notably, younger drinkers have shifted from being the least likely to moderate with alcohol-free options in 2018 to the most likely by 2025, reflecting a cultural shift in attitudes towards drinking among this group.

Motivations behind this uptake among younger drinkers reflect broader generational trends in health and lifestyle. Younger drinkers report an active lifestyle, health consciousness, and a desire to avoid intoxication or hangovers as key motivations for choosing alcohol-free and low-alcohol drinks.²⁵ In addition, these products are viewed as socially acceptable tools for moderating drinking without compromising the social aspects of drinking.²⁵

Motivations also vary by gender.^{14,13} Men are more likely than women to choose them for practical reasons, such as needing to drive (41% vs 30%), to cut down on alcohol (25% vs 20%) and to improve their overall health (26% vs 22%). Women are more likely than men to drink these products during pregnancy or supporting a pregnant partner (5% vs 2%).

Socioeconomic status is also a differentiating factor. In 2025, 48% of adults in the ABC1 social grade reported moderating with alcohol-free or low-alcohol products, compared to 40% in the C2DE group. However, in 2018, there was little difference between these groups (31% vs 32%). In fact, C2DE drinkers were slightly more likely to use low-alcohol drinks compared to ABC1 drinkers (27% vs 24%). Since then, uptake has increased among ABC1 drinkers, especially those aged between 18 to 34, whose use of alcohol-free and low-alcohol drinks has doubled from 27% to 54%.

The greater uptake among ABC1 drinkers may reflect distinct motivations. They are more likely than C2DE drinkers to report drinking these products when in a situation where they would usually drink alcohol, but either couldn't or didn't want to (28% vs 23%), when they are trying to avoid intoxication (24% vs 19%), and when aiming to cut down on their alcohol intake (24% vs 18%). They are also more likely to choose these drinks because they feel more social than a soft drink (27% vs 20%), or due to commitments the next day (e.g., work) (19% vs 15%).

Finally, consumption patterns also vary by drinking risk level. Low-risk drinkers (i.e., those who drink within the Chief Medical Officers' low-risk guidelines of 14 units each week) are consistently more likely to moderate with alcohol-free and low-alcohol drinks than those drinking above the guidelines. Between 2018 and 2025, current usage among low-risk drinkers rose from 34% to 45%, with the largest increases again seen among younger adults (aged 18-34), rising from 30% to 49%.

These trends highlight a clear demographic profile of those leading the shift toward moderation with alcohol-free and low-alcohol drinks in the UK. While engagement with this category for moderation is increasing across the population, it is young, affluent, and low-risk drinkers who are setting the pace.

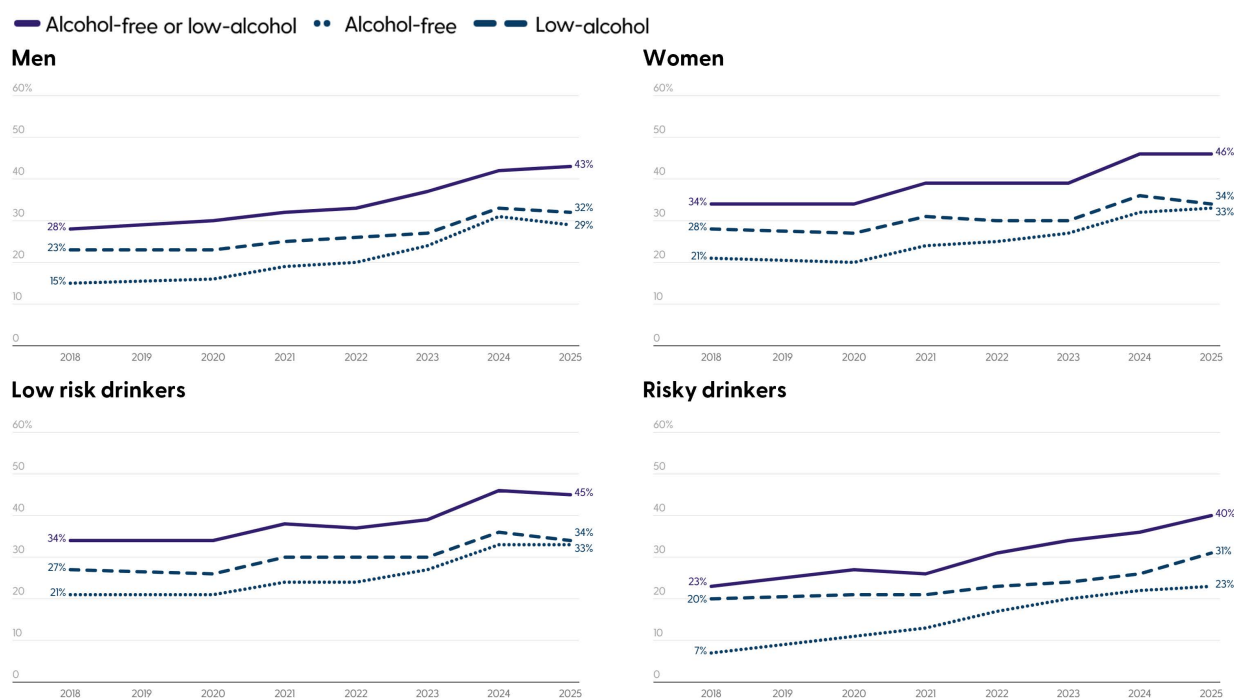
Realising the harm reduction potential

While the rise of alcohol-free and low-alcohol drinks has so far been led by young, affluent, and low-risk drinkers, their greatest potential lies in displacing regular-strength alcohol among those at higher risk of harm. Realising this potential will depend on increasing uptake among those drinking above the low-risk guidelines, for whom even small reductions in alcohol consumption could yield meaningful health benefits.

Encouragingly, recent trends suggest this shift is beginning to take place. Growing engagement among men and risky drinkers (groups historically less responsive to moderation messaging) indicates an important broadening of reach. Between 2018 and 2025, among male drinkers, moderation with these products rose from 28% to 43%, while use among risky drinkers increased from 23% to 40%; closing the gap with women and low risk drinkers (see **Figure 3**). Much of this growth was driven by alcohol-free products, with usage doubling among men (15% to 29%) and more than tripling among risky drinkers (7% to 23%), the largest increase of any group during this period.

Figure 3. Alcohol-free and low-alcohol use has increased significantly among men and risky drinkers

% of drinkers moderating with alcohol-free, low-alcohol, or either product, 2018–2025



Note 1. Alcohol-free and low-alcohol use was not recorded in the 2019 edition of the Drinkaware Monitor

Source: The Drinkaware Monitor, 2018 to 2025. All adults who drink alcohol. 2018 (Men[n=3,950], Women[n=3,952], Low-risk drinkers[n=6,055], Risky drinkers[n=1,847]); 2025 (Men[n=3,003], Women [n=3,071], Low-risk drinkers [n=5,002], Risky drinkers [n=1,072]).

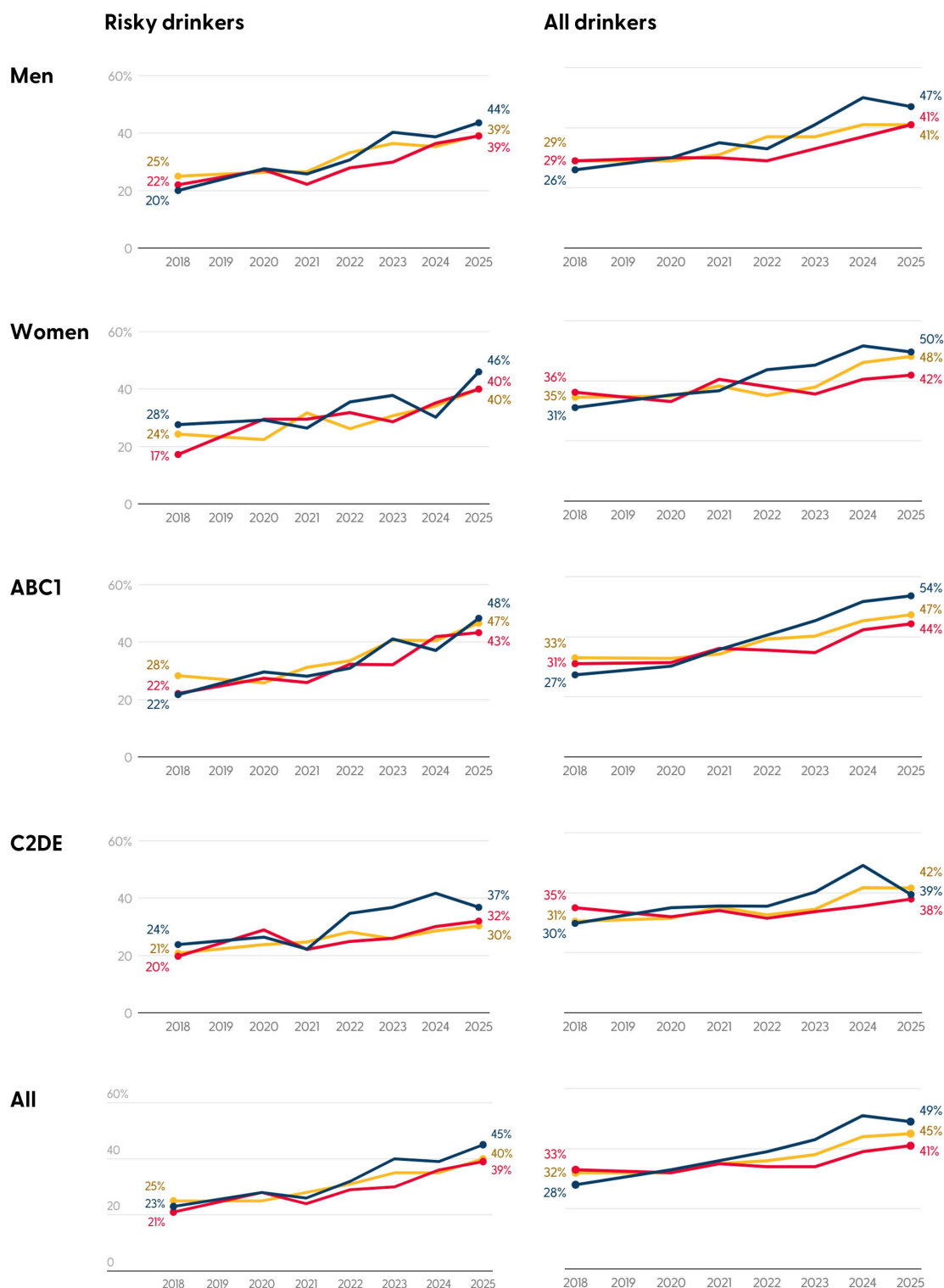
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Notably, uptake among men appears to be predominantly driven by younger age groups, whereas among risky drinkers, growth is occurring across the age spectrum (see **Figure 4**).

Figure 4. Alcohol-free & low-alcohol use has increased among all risky drinkers since 2018

Trends by age group among men, women, and ABC1 social grades, shown separately for all drinkers and risky drinkers.

— 18 to 34 year olds — 35 to 54 year olds — 55+ year olds



Note 1. Alcohol-free and low-alcohol use was not recorded in the 2019 edition of the Drinkaware Monitor Note 2. %s for risky female drinkers (18-34) are only indicative as sample size was less than 100 in 2025 (n=77) Note 3. %s for risky C2DE drinkers (18-34) are only indicative as sample size was less than 100 in 2025 (n=68)

Source: The Drinkaware Monitor, 2018 to 2025. All adults who drink alcohol. 2018 (n=7,902), 2020 (n=7,834), 2021 (n=7,911), 2022 (n=5,428), 2023 (n=9,035), 2024 (n=4,376), 2025 (n=6,074)

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For instance, the proportion of risky drinkers aged 18 to 34 years moderating with alcohol-free and low-alcohol drinks almost doubled from 23% to 45% between 2018 and 2025. Among those aged 55 and over, usage also almost doubled, rising from 21% to 39%. The latter stands in contrast to the general trend in uptake in the UK, which typically shows more modest increases in uptake among older drinkers.

The largest increases among risky drinkers occurred among older female drinkers aged 55 and over and younger ABC1 drinkers aged 18 to 34. Between 2018 and 2025, uptake more than doubled among older female risky drinkers (from 17% to 40%) and among younger ABC1 risky drinkers (from 22% to 48%). Significant increases were also observed among older ABC1 risky drinkers (from 22% to 43%) and older male risky drinkers (from 22% to 39%). While older C2DE risky drinkers also reported increased use, the growth was less pronounced, rising from 20% to 32% (see **Figure 4**).

Although alcohol-free and low-alcohol drinks remain underused by risky drinkers overall, these increases suggest untapped potential. As interest in these products continues to grow, there is an opportunity to support wider behaviour change, especially through interventions designed to align with the specific motivations and barriers experienced by these groups to using these products for moderation.

Practical needs, taste, cutting down and marketing are driving uptake among risky drinkers

Drinkaware Monitor data shows that risky drinkers tend to have distinct motivations for consuming alcohol-free and low-alcohol products. Compared to all drinkers of these products, risky drinkers are more likely to cite practical needs, such as needing to drive (47% vs 35%), being in situations where they couldn't or didn't want to drink alcohol (40% vs 26%) and wanting to cut down their alcohol intake (39% vs 22%).

Motivations also vary among risky drinkers. Male risky drinkers are more likely than female risky drinkers to report practical reasons such as the need to drive (53% vs 36%), while women are more likely to report using these products when in situations where they couldn't or didn't want to drink alcohol (53% vs 34%) or because they replicate the experience of (or feel like) drinking alcohol (32% vs 20%).

Compared to all risky drinkers, younger risky drinkers report motivations related to fitting in, including wanting to feel part of an occasion (20% vs 11%) and to avoid questions on why they are not drinking (14% vs 5%). On the other hand, older risky drinkers are more likely to cite practical needs, such as needing to drive (55% vs 47%).

Risky drinkers from ABC1 social grades are more likely than their C2DE counterparts to choose these products to fulfil commitments the next day, such as work (23% vs 12%), while risky drinkers from C2DE social grades are not more likely to report any motivation for drinking these products.

Marketing practices may also be influencing uptake, particularly among men and risky drinkers. Research suggests that young men are a key target audience for alcohol-free and low-alcohol drinks, especially in the beer category, which accounts for most sales in this segment.²⁶ Alcohol-free and low-alcohol beer are most likely to be purchased by heavier drinkers, men, younger adults and those from higher socioeconomic groups.²⁷

The purchasing behaviour surrounding alcohol-free beer often means the branding and promotions of these products draw on masculine cultural cues, such as associations with sports and traditional drinking rituals.¹⁵ While some alcohol-free and low-alcohol drinks are marketed towards women and often align with gendered themes like dieting and wellness, the prominence of beer in this category means that much of the marketing may disproportionately target groups such as men and risky drinkers.^{15,13} This may help explain the notable increases in uptake of these products among these groups between 2018 and 2025.

The growing acceptability and declining social stigma around these products may also help to explain the increases in uptake among men and risky drinkers. A multi-country study found that four in five consumers (80%) believe alcohol-free and low-alcohol drinks are more acceptable now than they were five years ago.²⁸ A separate study found that among 'daily heavy drinkers' specifically, over four in five (86%) view these products as important for cutting back alcohol, with nearly three-quarters (73%) considering them 'essential' or 'very important' to their attempts to cut back.²⁹ This suggests that shifting perceptions of these products are not only making them more socially acceptable to consume, they are also positioning them as legitimate tools for harm reduction among those drinking at risky levels.

Who's being left behind? Age, socioeconomic and regional disparities

While the uptake of alcohol-free and low-alcohol drinks for moderation continues to grow, this shift is not reaching all groups equally. Emerging disparities, particularly by age, socioeconomic status and region, suggest some populations are being left behind. Alcohol-free and low-alcohol drinks have the potential to offer a widely accessible option for harm reduction; however unequal access and adoption could increase existing health inequalities.

Older drinkers are lagging behind

In 2018, older drinkers aged 55 and over were the most likely to use alcohol-free and low-alcohol drinks to moderate their drinking. However, by 2025, they have become the least likely age group to do so. Uptake among older adults rose from 33% to 41%, the smallest increase of any age group. Yet, it is among this age group where consumption and alcohol harm is highest. In addition, age-related factors, such as comorbid health conditions, medication use, and slower alcohol metabolism make this group more vulnerable to harm.^{30,31} As a result, they may represent an important audience for alcohol-free and low-alcohol products and the harm reduction potential they offer.

The socioeconomic gap is widening

Between 2018 and 2025, uptake of alcohol-free and low-alcohol products increased across socioeconomic groups. Among ABC1 drinkers, uptake rose from 31% to 48%, compared to a smaller increase among C2DE drinkers (from 32% to 40%). While both groups saw progress, the widening gap suggests that drinkers from higher social grades are adopting these products at a faster rate, potentially reinforcing existing inequalities in who benefits from harm reduction strategies.

This trend is particularly concerning in the context of the Alcohol Harm Paradox, whereby less affluent groups experience disproportionately greater alcohol-related harm despite often consuming alcohol at similar, or even lower levels, than more affluent groups.³² This disparity is thought to partially reflect compounding behavioural risk factors (such as higher rates of smoking, obesity and physical inactivity), which tend to be more common among lower socioeconomic groups.³² Slower uptake of alcohol-free and low-alcohol drinks among these groups risks widening the very health inequalities these products have the potential to help reduce.

Regional disparities across the UK

In addition to age and socioeconomic gaps, regional variation in uptake is also emerging. Between 2018 and 2025, Wales saw the smallest increase of any UK nation in the uptake of alcohol-free and low-alcohol drinks, rising from 33% to 39%, with Scotland just behind (rising 32% to 40%).

In contrast, the proportion of drinkers in England using these products increased from 31% to 45% and Northern Ireland saw the largest increase, from 33% to 48%. These disparities may reflect demographic and cultural differences between these nations. For example, Scotland and Wales have older populations, who generally report lower uptake of these products. To better understand and address these regional disparities, further research is needed that focuses on perceptions and attitudes towards these products across the UK.

Low understanding, perceptions, and availability prevent wider uptake

While the growth in alcohol-free and low-alcohol drinks is promising, Drinkaware Monitor data and wider evidence point to several barriers that could continue to limit their wider adoption, particularly among groups who could benefit from moderation. Addressing these barriers can help these products realise their potential as a harm reduction tool.

Low understanding of product definitions

A fundamental obstacle is the lack of consumer understanding around what qualifies as 'alcohol-free' or 'low-alcohol'.³³ According to a 2024 Drinkaware report, only 26% of drinkers could correctly define 'alcohol-free', and just 16% were familiar with the definition of 'low-alcohol'.

Understanding of these terms may be lower among older adults who were found to be less likely to know the definition of alcohol free (20%).³⁴ Without clear understanding, many drinkers may be unsure of how these drinks align with their moderation goals or may not recognise their potential value at all, particularly those with slower uptake, such as older adults.

Taste and preference for soft drinks

Taste also remains a barrier to the trial and adoption of these products. Among drinkers who have never consumed one of these products, and who do not currently moderate with them, half (52%) said they would prefer a soft drink if not drinking a regular-strength alcoholic drink. Additionally, 18% thought alcohol-free and low-alcohol drinks would taste worse than conventional products; a figure that rises to 28% among risky drinkers. These perceptions suggest that, for many, alcohol-free and low-alcohol drinks are yet to be considered compelling enough alternatives to regular-strength alcohol.

Negative perceptions among risky drinkers

Even though uptake is increasing among risky drinkers, this uptake is occurring despite several psychological and cultural barriers, which mean risky drinkers still have the lowest rates of moderation with these products in the UK. While the appeal of these products is growing, obstacles remain and addressing them could unlock further uptake of these products as a moderation tool.

Some risky drinkers perceive these products as triggering or as reminders of alcohol, making them less appealing during attempts to cut down.³⁵ This may help explain why risky drinkers tend to be more likely than all drinkers to view these products as ineffective in helping them to reduce their alcohol intake.

Around one in four risky drinkers (28%) view both alcohol-free and low-alcohol drinks as ineffective (compared with 14% and 13%, respectively, among all drinkers). Nevertheless, the majority of risky drinkers regard these products as useful tools for cutting back, with 68% considering alcohol-free drinks effective (vs 77% of all drinkers), and 69% saying the same for low-alcohol drinks (vs 78%).³⁶

There is also some concern that risky drinkers may consume these products in addition to regular alcoholic drinks.^{13, 14} Drinkaware Monitor data finds that one in ten (9%) risky drinkers who drink alcohol-free and low-alcohol do so alongside (or in addition) to their usual consumption (vs 6% of all drinkers of these products), while one in four (25%) report using them either as an addition or as a substitute depending on the situation (vs 23% of all drinkers). Despite this, most risky drinkers (59%) who use these products to moderate tend to do so as a replacement for regular alcoholic drinks (vs 64% of all drinkers).

Additionally, the effects of regular-strength alcohol continue to play an important role in the drinking motivations of risky drinkers, which may undermine the appeal of alcohol-free and low-alcohol drinks among this group. While broader public perceptions of these drinks have become more positive, 2024 Drinkaware Monitor data also shows that risky drinkers who currently use or are interested in these drinks are more likely than all drinkers to face disapproval from friends, family and colleagues (18% vs 11%). Although their social networks are generally supportive, this lack of approval in some circles may make these products less appealing in certain situations, creating a barrier to wider uptake among those drinking at higher levels.

Affordability, availability and access

While the alcohol-free and low-alcohol category has grown in recent years, concerns remain about the accessibility of these products, particularly in on-trade settings. Research from KAM Insight shows that many consumers still struggle to find alcohol-free and low-alcohol options on menus or at the bar, despite 40% of customers saying that increasing the visibility of these products would encourage them to try them.³⁷

Increasing the availability of these products could be good for business as well as reducing alcohol-harm, especially given that people's drinking settings are increasingly being influenced by both non-drinkers and moderators. For example, the vast majority (85%) of 18 to 24 year olds say the needs of non-drinkers inform where they choose to drink with their social group.³⁷ Therefore, ensuring alcohol-free and low-alcohol options are visible and accessible could support broader uptake, contribute to harm reduction and align with consumer needs.

The way alcohol-free and low-alcohol products are positioned and marketed may also be contributing to disparities in uptake. These drinks are often framed as part of a 'high status' lifestyle, with messaging that may resonate more with younger, more affluent consumers.³⁸ This premium positioning not only reinforces exclusivity but can drive up prices, making these products less accessible or appealing to lower-income groups.^{26,39}

Although Drinkaware Monitor data finds no significant differences between ABC1 and C2DE groups in their propensity to report price as a barrier to these products, affordability remains an issue, particularly for risky drinkers. Cost was cited as a reason for not consuming alcohol-free and low-alcohol drinks by 17% of risky drinkers, compared to 12% of all drinkers.

Risky drinkers are also significantly more likely to say they would rather buy conventional alcoholic drinks (45% vs 31%), perhaps due to them being considered better value for money. This would be consistent with qualitative research showing that many view alcohol-free and low-alcohol options as poorer value for money.⁴⁰ Improving the affordability or perceived value of these products could help broaden their appeal among the wider population, and especially higher-risk groups.

Another concern is the limited variety within the alcohol-free and low-alcohol category, which continues to be dominated by beer and cider.⁴¹ Research shows that drinkers are more than twice as likely to have tried an alcohol-free beer (20%) in the past three months than an alcohol-free sparkling wine (10%), still wine (9%) or spirit (8%).⁶ This imbalance may reflect the difficulty in developing appealing, high-quality alternatives for wine and spirit drinkers, who may perceive current options as poor value or inferior in taste.^{42, 43}

Expanding the range and quality of alcohol-free and low-alcohol options, or tapping into the growing popularity of the mid-strength category, could help to encourage moderation among a wider group of drinkers, and contribute to reducing alcohol-related harm.

Conclusions

The rise in popularity of alcohol-free and low-alcohol products reflects a broader cultural shift towards moderation in the UK. Drinkaware Monitor data shows that this trend is largely driven by the increasing uptake of alcohol-free products, which have grown from 18% in 2018 to 31% in 2025. This growth likely reflects improvements in product quality, wider availability, and targeted marketing.

While young, affluent and low-risk drinkers remain at the forefront, increasing uptake among men and risky drinkers points to emerging opportunities for harm reduction. Between 2018 and 2025, moderation with these drinks among risky drinkers almost doubled from 23% to 40%, with alcohol-free use more than tripling from 7% to 23%. However, the public health benefit of this trend depends not only on rising usage but on the extent to which alcohol-free and low-alcohol drinks are being used as substitutes for regular-strength alcohol; displacing consumption rather than being added to it.

Initial evidence suggests that substitution is occurring which is consistent among risky drinkers as well. Research also finds that these products are considered important to reducing consumption among those who drink large amounts daily.²⁹ However, some risky drinkers continue to question the effectiveness of these drinks in reducing consumption, and are slightly more likely than all drinkers to use them alongside, rather than instead of, regular alcohol. Without stronger messaging and structural supports to encourage substitution, such as pricing strategies, availability in key settings, and reinforcement through social norms, the harm reduction potential of this category may not be fully realised.

Accessibility and visibility remain key barriers, particularly in the on-trade. Research shows that many consumers struggle to find alcohol-free and low-alcohol options on menus or at the bar.³⁷ This is despite better visibility in hospitality venues being cited by consumers as a way to encourage them to try these products. Additionally, non-drinkers and moderators are increasingly influencing venue choice, especially among 18 to 24 year olds whose decisions on where to drink are heavily influenced by the needs of non-drinkers in their social groups.³⁷ Therefore, increasing the availability of these products could support business as well as efforts to reduce alcohol-harm.

Motivations for choosing these products are varied and context-specific, ranging from taste and curiosity to cutting down or more practical reasons such as needing to drive. Tapping into these motivations could provide a way to increase uptake among those where uptake has been slower.

However, as these products become more popular, it is important to remember that they may not be suitable for everyone. This is particularly relevant in light of the UK government's plans to raise the alcohol-free threshold from 0.05% to 0.5% as part of the NHS 10-year plan to support category growth.²⁰ Increasing visibility and availability could risk normalising alcohol consumption among children, pregnant women, or individuals in recovery. Additionally, recommending these drinks to risky drinkers may complicate efforts to reduce intake if they lead to prolonged drinking occasions rather than replace alcohol. Therefore, clear guidance, responsible marketing, and education is required to ensure the growth of this category supports, rather than undermines, harm reduction efforts in the UK.

Policymakers, producers, and retailers have a window of opportunity to shape the direction of this growing category. This includes ensuring affordability, increasing availability in both retail and on-trade settings, designing inclusive product ranges, and delivering campaigns that support substitution, particularly among those at higher risk of alcohol-related harm.

Overall, the role of alcohol-free and low-alcohol products in supporting moderation among drinkers represents a promising development. But their potential as harm reduction tools depends on how they are used. Ongoing monitoring is essential to understand whether these drinks are meaningfully displacing alcohol consumption, and to ensure their harm reduction potential reaches populations most at risk of harm.

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