drinkaware

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

Introduction

Alcohol-free products typically contain no more than 0.05% alcohol, while low-alcohol products contain up to 1.2%. These drinks are becoming a significant part of the UK's drinking landscape, with their expansion reflected in the 2025 NHS 10-year plan, which emphasises these drinks as part of a broader strategy to reduce alcohol-related harm.[1]

While young, affluent, 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.

The full 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.

Key findings

- UK drinkers are increasingly moderating their alcohol intake with alcohol-free and low-alcohol drinks (44% in 2025 vs 31% in 2018).
- Young, affluent and low-risk drinkers lead this trend, but increases are also emerging among men and risky drinkers.
- 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.
- Less affluent and older drinkers (aged 55+) have seen more modest increases in moderation with alcohol-free and low-alcohol drinks.
- The main motivations for drinking these products include needing to drive, curiosity, being in situations where people couldn't or didn't want to drink alcohol, and the appeal of their similarity in taste to alcoholic drinks.
- Barriers to wider uptake 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. Wider evidence also points to low understanding of product definitions, and limited visibility and availability, particularly in on-trade settings.

Alcohol-free and low-alcohol use is rising in the UK

The use of alcohol-free and low-alcohol drinks as moderation tools is rising faster than any other approach in the UK, such as taking drink-free days, swapping alcoholic drinks for soft drinks or water, or drinking within the guidelines.

In 2025, 44% of drinkers reported moderating with at least one of these products – up from 31% in 2018.[2] Alcohol-free use has seen the largest rise, increasing from 18% in 2018 to 31% in 2025. Low-alcohol drinks also experienced steady growth, rising from 25% to 33% over the same period.

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

Alcohol-free and low-alcohol uptake has increased among drinkers aged 18 to 34, from 28% in 2018 to 49% in 2025; the largest increase of any age group.[2]

Additionally, more affluent drinkers have emerged as key drivers of these products, with usage increasing among ABC1 drinkers from 31% to 48% in 2025.[2] Low-risk drinkers have also seen significant increases in uptake, rising from 34% to 45% between 2018 and 2025.[2]

Realising the harm reduction potential

To fulfill their harm reduction potential, alcohol-free and low-alcohol products need to displace regular-strength alcohol among those at higher risk of harm.

Encouragingly, moderation with at least one of these products rose among risky drinkers, from 23% in 2018 to 40% in 2025, with alcohol-free use more than tripling from 7% to 23%.[2]

Practical needs and cutting down are driving uptake among risky drinkers

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%), as reasons to choose these products. This suggests that use among risky drinkers is motivated as much by convenience and circumstance as by health concerns.

However, risky drinkers are less likely than all drinkers of these to drink these products to help them avoid a hangover (13% vs 17%) or because it helped them feel part of a social occasion (11% vs 14%).[2]

Who's being left behind?

Some disparities in uptake are emerging, particularly by age, socioeconomic status and region. For example, older drinkers aged 55 and over saw the smallest increase in uptake of any age group (from 33% in 2018 to 41% in 2025), despite these drinkers having the highest rates of use in 2018.[2]

Less affluent drinkers from the C2DE social grade have also seen smaller increases in uptake (from 32% in 2018 to 40% in 2025) compared to more affluent drinkers (31% in 2018 to 48% in 2025).[2] This widening gap in usage is particularly concerning as drinkers from low-income backgrounds are at increased risk of alcohol harm despite often consuming alcohol at similar, or even lower, levels than more affluent groups.[3]

Northern Ireland and England saw the largest increases in uptake in the UK. However, only modest increases were observed among drinkers in Wales and Scotland.[2]

Low understanding, perceptions, and availability prevent wider uptake

There is a lack of understanding around what qualifies as 'alcohol-free' or 'low-alcohol'. Just 26% of drinkers can correctly define 'alcohol-free' while just 16% know the definition of 'low-alcohol'.[4] The perceived taste of these products is a significant barrier among non-drinkers of these products with 54% saying they would prefer soft drinks, while 18% say these options would taste worse than regular alcohol; the latter rising to 28% among risky drinkers.[2]

Risky drinkers are more likely than all drinkers to view alcohol-free and low-alcohol products as ineffective in reducing alcohol intake (both 28%, compared with 14% and 13%, respectively, among all drinkers). They are also more likely to drink these products in addition to regular alcohol (9% vs 6%), and to report disapproval from friends (18% vs 11%).[2] However, the majority of risky drinkers still find these products helpful to cutting down, with 68% considering alcohol-free drinks effective (vs 77% of all drinkers), and 69% saying the same for low-alcohol drinks (vs 78%).[5]

Accessibility is another barrier to wider uptake, particularly in on-trade settings where many consumers report difficulty finding these products on menus or at the bar.[6] Marketing practices may also contribute to disparities in uptake, as alcohol-free and low-alcohol drinks are often framed as part of a high-status, health-conscious lifestyle,[7] which may resonate more with younger, affluent consumers and reinforce their perceived exclusivity.

Cost is another barrier, and 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 were also more likely to say they would rather buy conventional alcoholic drinks (45% vs 31% of all drinkers).[2]

The alcohol-free and low-alcohol category also continues to be dominated by beer and cider with limited alternatives for wine and spirits drinkers.[8] Expanding the range of these options could help to encourage uptake among a wider group of drinkers.

Conclusion

The rise in alcohol-free and low-alcohol drinks is promising, particularly among risky drinkers. However, the harm reduction potential of these products should be supported through pricing strategies, wider availability and stronger messaging that reinforces these drinks as effective ways to moderate alcohol use.

Policymakers, producers and retailers have a window of opportunity to shape the direction of this growing category which should be monitored closely to ensure it is reducing alcohol consumption and reaching those most at risk of alcohol harm.

References

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[2] All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 7256 adults. Fieldwork was undertaken between 4th - 26th June 2025. The survey was carried out online. The figures have been weighted by age, gender, social grade, region, and devolved nation and are representative of all UK adults (aged 18 to 85).

[3] Bellis, M. A., Hughes, K., Nicholls, J., Sheron, N., Gilmore, I., & Jones, L. (2016). The alcohol harm paradox: Using a national survey to explore how alcohol may disproportionately impact health in deprived individuals. BMC Public Health, 16(1), 111. https://doi.org/10.1186/s12889-016-2766-x

[4] Drinkaware. (2024). Baseline survey of people's awareness and perceptions of no and low alcoholic drinks. https://media.drinkaware.co.uk/media/sebjql5u/drinkaware-low-and-no-report.pdf

[5] All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 5,143 adults. Fieldwork was undertaken between 29th May - 11th June 2024. The survey was carried out online. The figures have been weighted by age, gender, social grade, region, and devolved nation and are representative of all UK adults (aged 18 to 85).

[6] Everleaf & KAM Insight. (2024). Raising the bar: How the UK On-Trade is failing to meet the demand for alcohol-free. Available at: https://kaminsight.com/wp-content/uploads/sites/2044/2025/01/Everleaf-x-KAM-Raising-the-Bar-Nov-2024-6.pdf

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