

Beer in figures

Value: £3.48 billion (2008: £3.33 billion)
Change: 5%
Volume: 18.7 million hl (2008 18.9 million hl)
Change: -1%

Source: Nielsen year to Oct 3, 2009 and October 4, 2008

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Beer Report 2009

Compiled by Nicola Collenette

Data in the OLN Beer Report covers sales in the off-trade and was sourced from Nielsen's Scantrack Service. Scantrack monitors weekly sales from a nationwide network of EPOS checkout scanners. Coverage includes grocery multiples, co-ops, multiple off-licences, independents, symbol groups and multiple

forecourts. Nielsen's retail measurement service provides comprehensive information on actual purchases, market shares, pricing, distribution and promotional activities. It is the fastest and most accurate monitor of consumer sales. The OLN Beer Report was compiled by The Nielsen Company exclusively for William Reed Business Media.

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Top of the drops

Nicola Collette highlights the winners and losers in the beer market over the past year

The landmark moment when the dominant force in the beer market shifts from being the on-trade to the off draws ever closer.

Industry estimates vary but, according to Nielsen analyst Graham Page, off-trade beer volume sales are set to overtake the on-trade in the last quarter of 2010 or first quarter of 2011 if current trends continue.

Figures from the British Beer & Pub

Association say the on-trade has a 56% share and the off-trade a 44% share of total annual beer sales.

"It's not that the off-trade is doing spectacularly well as it's pretty static – it's that the on-trade figures are spectacularly awful," says Page.

Off-trade value sales of beer have increased by 5% this year while volumes are down by 1%.

Page explains: "We've seen duty increases from March and December last

year, and again in March this year." Additionally, he says, when VAT returns to 17.5% next year it will have a further impact on the industry.

Page says there has also been a huge switch from 18 and 24 packs to smaller packs.

"Prices look very competitive on these smaller packs and consumers don't see them as more expensive," he adds.

The third "indifferent" summer in a row has also had an impact on sales, Page says.

"We had an Indian summer in September but the kids were back at school and it was outside the barbecue season. Put that together with the worst recession we have had for 80 years and compare it to previous summers where the market was rather different, and you can see why the category is struggling somewhat."

There has certainly been a big shake-up in this year's top 10.

Carling has seen value declines of 4% that has resulted in it dropping from second place to third, with Foster's climbing up to second position. And Grolsch, another of Molson Coors' brands, has dropped out of the top 10 altogether with a huge 38% sales decline.

Chief executive Mark Hunter says both Carling and Grolsch's declines were

"expected". He says: "We made a conscious decision to focus on profitable volume as we are trying to get the category away from focusing on price. We want to see added value instead."

He confirms Page's comments on a shift away from slabs: "With Grolsch we are moving away from larger packs to smaller and mid-size and swing-top formats," Hunter says.

"We are pretty comfortable where we are and were expecting this."

Budweiser Budvar, which has dropped seven places to number 50, puts its dip down to losing a big listing because of an equally hardline approach to pricing. Jon Whittle, director of take-home sales, says: "We have enjoyed another successful year's trading but lost a listing with Sainsbury's."

He says the Czech brand decided not to carry on with the listing due to "outrageous financial demands" from the supermarket.

Page thinks pricing will continue to be ferocious, saying Christmas pricing will be "a spectacular free-for-all".

"There is no evidence to suggest the grocers and off-licence trade are heeding the pressure of the government's calls for minimum pricing.

"Competition is as tight as ever and

Top 50 off-trade beer brands

Position (Last year's in brackets)	Brand	Supplier	% sales change	Nielsen, year to October 3, 2009
1 (1) ◀▶	Stella Artois	A-B Inbev	5	
2 (3) ▲	Foster's	Scottish & Newcastle UK	18	
3 (2) ▼	Carling	Molson Coors	-4	
4 (4) ◀▶	Carlsberg	Carlsberg UK	-1	
5 (5) ◀▶	Budweiser	A-B Inbev	15	
6 (6) ◀▶	Carlsberg Export	Carlsberg UK	4	
7 (7) ◀▶	Kronenbourg 1664	Scottish & Newcastle UK	-9	
8 (9) ▲	Beck's	A-B Inbev	8	
9 (10) ▲	John Smith's Extra Smooth	Scottish & Newcastle UK	10	
10 (11) ▲	Tennent's	C&C Group	5	
11 (12) ▲	Guinness Draught	Diageo	2	
12 (58) ▲	Stella Artois 4%	A-B Inbev	887	
13 (8) ▼	Grolsch	Molson Coors	-38	
14 (13) ▼	Carlsberg Special Brew	Carlsberg UK	9	
15 (17) ▲	Peroni Nastro Azzurro	Miller Brands	47	
16 (14) ▼	San Miguel	Carlsberg UK	8	
17 (19) ▲	Corona Extra	Wells & Young's	26	
18 (16) ▼	Heineken	Scottish & Newcastle UK	3	
19 (18) ▼	Boddingtons	A-B Inbev	7	
20 (21) ▲	Old Speckled Hen	Greene King	21	
21 (15) ▼	Tennent's Super	A-B Inbev	-21	
22 (20) ▼	Guinness Original	Diageo	3	
23 (25) ▲	Cobra	Molson Coors	32	
24 (23) ▼	Holsten Pils	Carlsberg UK	16	
25 (22) ▼	Miller Genuine Draft	Miller Brands	4	

promotional activity has already started. It wouldn't surprise me if 50%-60% of all beer is sold on promotion in November and December," he says.

Stella Artois holds on to the top spot, with value sales up 5% after a 3% decline in 2008. Beck's double-digit rise in sales last year has slowed, but it's still showing a healthy uplift of 8% in 2009.

Budweiser, too, has seen a healthy 15% sales growth over the past year.

Andreas Hilger, marketing director for A-B Inbev UK & Ireland, denies growth is down to discounting. He says: "All three of our global flagship brands had a great year in 2009 despite tough market conditions. Both marketing investment and sales focus have helped grow brand equity.

"The Stella Artois eco-campaign Recyclage de Luxe was the first of its kind in this industry and was well received by consumers."

Carlsberg Export has remained at number six in the chart but has reversed its fortunes from last year, with growth of 4%.

Tennent's, which was acquired from A-B Inbev by Magners' owners C&C in September this year, has moved up a place to number 10.

"It was an incredibly attractive deal for

C&C. Tennent's is immensely strong in Scotland and commands about 50% of the market share in the off and on-trade." He says there is "huge potential" for C&C to move the brand further south.

Page says further rationalisation of brewers' portfolios will be on the cards in the future.

There is continued speculation about what other assets might go from A-B Inbev's range, following the sale of Tennent's, he says.

Alongside Grolsch, Kronenbourg is another premium lager that hasn't managed to turn things around, recording a decline of 9%.

The top 10 is once again dominated by lager brands, with the exception of Scottish & Newcastle's John Smith's Extra Smooth which has moved up one place to ninth position.

Heineken, now Britain's biggest brewer after last year's takeover of S&N, released its results last week. The company doesn't split out results for the UK but said there had been a growth in its British beer volumes in the third quarter.

Five brands have fallen out of the top 50, being replaced with some big names.

Marston's Pedigree has returned after being ousted last year, as has Coors Light,



which is now worth £12 million in the off-trade. Molson Coors' ale brand Worthington's Creamflow has dropped out of the top 50, together with Theakston's Old Peculier.

There are two noticeable absences, with Shepherd Neame's Oranjeboom and

the discontinued Peeterman Artois leaving the chart, being replaced with Carlsberg's Tuborg and Greene King's Abbot Ale. Similarly A-B Inbev's Castlemaine XXXX has seen a huge decline with a fall of 46% as stock of the axed brand is sold through.

Top 50 off-trade beer brands

Position (Last year's in brackets)	Brand	Supplier	% sales change	Nielsen, year to October 3, 2009
26 (24) ▼	Newcastle Brown	Scottish & Newcastle UK	2	
27 (29) ▲	Beck's Vier	A-B Inbev	34	
28 (30) ▲	John Smith's Original	Scottish & Newcastle UK	18	
29 (27) ▼	McEwan's Export Ale	Scottish & Newcastle UK	1	
30 (34) ▲	Tetley's Smoothflow	Carlsberg UK	29	
31 (41) ▲	Sol	Molson Coors	41	
32 (39) ▲	Tiger	Scottish & Newcastle UK	26	
33 (42) ▲	Coors Light	Molson Coors	47	
34 (38) ▲	Lefte Blonde	A-B Inbev	20	
35 (35) ◀▶	London Pride	Fuller's	8	
36 (40) ▲	Tyskie	Miller Brands	16	
37 (33) ▼	Skol	Carlsberg	-10	
38 (32) ▼	Murphy's	A-B Inbev	-17	
39 (31) ▼	Caffrey's	Molson Coors	-17	
40 (46) ▲	Red Stripe	Wells & Young's	25	
41 (49) ▲	Brahma	A-B Inbev	30	
42 (37) ▼	Tetley's Original	Carlsberg UK	-10	
43 (48) ▲	Hobgoblin	Marston's	22	
44 (52) ▲	Marston's Pedigree	Marston's	30	
45 (60) ▲	Tuborg	Carlsberg UK	44	
46 (44) ▼	Skol Super	Carlsberg UK	5	
47 (28) ▼	Castlemaine XXXX	A-B Inbev	-46	
48 (54) ▲	Abbot Ale	Greene King	22	
49 (51) ▲	Tanglefoot Bitter	Hall & Woodhouse	13	
50 (43) ▼	Budweiser Budvar	Budweiser Budvar UK	-5	

Stella 4% soars into top 10

Stella Artois is the undisputed champ of lager. Nicola Collette charts the impact of its new brand extension

The most startling change to this year's line-up of top lager brands is just how forcefully Stella 4% has entered it. It has ousted Grolsch from the top 10 and is now worth £59 million, recording an incredible 887% increase in sales. Nielsen analyst Graham Page says: "The structure of the lager market has changed – pseudo premium brands such as Beck's Vier and Stella 4% are well-established and successfully so."

Andreas Hilger, marketing director for AB-Inbev UK & Ireland, says: "Following



Heavyweight advertising has helped net Stella 4% sales of £59 million

its launch in August 2008, Stella Artois 4% has enjoyed strong momentum in its first full year, fuelled by heavyweight marketing investment into advertising as well as visibility programmes at the point of connection." He says Beck's, which increased sales by 8%, has gained resonance with consumers from its Music Inspired Art marketing campaign, where musicians such as Hard Fi and Ladyhawke designed labels for the brand.

Axed Miller Beer has dropped out of the

top 20 but other than that the brands remain the same. Off-trade sales value in the lager category has increased by 4% this year, but what else can be done to drive the market?

Neil Whelpton, beer buyer at Waitrose, says: "New product development will always be a key driver of growth. There have been a lot of recent launches that are a variation on a current brand such as Grolsch Blond and Stella 4%, which have been well supported by strong advertising campaigns. But some true innovation is long overdue."

Hilger agrees: "Premium lager has always been a strong traffic builder in the off-trade and will continue to be in the future. But this category, as much as other categories, needs fresh ideas and innovation to build consumer attraction and improve relevance for consumers as they consider different products and brands."

Molson Coors' chief executive officer Mark Hunter thinks opportunities lie around packaging and dispense. The

brewer is now trialling Carling home draught containers in Sainsbury's, which have a CO₂ valve to keep the beer fresh for up to 30 days.

Page of Nielsen says: "The level of profitability is exceptionally thin for all the major brewers which is why we have seen so little true innovation in beer over the past four years. We've seen a little bit in packaging but with the exception of Stella and Beck's there's not been a huge raft of new brands."

Carlsberg UK's chief executive Isaac Sheps adds: "It's not so much only about margins. Whenever you go with innovation, if you go in big, it's a big risk and investment – especially with the market as it is. People are more cautious."

In May Carlsberg and Carlsberg Export both underwent packaging revamps.

Sheps says: "When the economy gets better no doubt we will see more innovation, but at the moment consumers aren't open to innovation as they are being careful with their money."

Lager in figures

Value: £2.89 billion
(2008: £2.77 billion)

Change: 4%

Volume: 15.9 million hl
(2008: 16.1 million hl)

Change: -1%

Source: Nielsen year to Oct 3 2009 and October 4 2008

Top 20 lagers		
Position	Brand	% change
1	Stella Artois	5
2	Foster's	18
3	Carling	-4
4	Carlsberg	-1
5	Budweiser	15
6	Carlsberg Export	4
7	Kronenbourg 1664	-9
8	Beck's	8
9	Tennent's	5
10	Stella Artois 4%	887
11	Grolsch	-38
12	Carlsberg Special Brew	9
13	Peroni Nastro Azzuro	47
14	San Miguel	8
15	Corona	26
16	Heineken	3
17	Tennent's Super	-21
18	Cobra	32
19	Holsten Pils	16
20	Miller Genuine Draft	4

Ones to watch

Looking beyond the top 10 list, Nielsen's Graham Page says: "If there's been any growth it's been small imported brands with true provenance, but these are comparatively small beer to the total marketplace. The Far East is an area to watch, and I'd expect to see some fairly big brands penetrating over here."

Tim Sprake, sales director at Wells & Young's, which imports Corona and brews Red Stripe and Kirin Ichiban, says: "In the world beer category we're still seeing great growth and it hasn't slowed down. A number of other players are trying to enter the category."

"There's a great opportunity for retailers but they tend to look for large returns and squeeze the value, which is a missed opportunity. We've seen it happening in premium bottled ales – they've got to be careful not to take all the value out of the category."

Ale sales stage come back

Ales have returned to growth in the last year as Nicola Collenette reports

What a difference a year makes. Overall sales of ales have increased by 7% this year, compared to the flat market of just a year ago.

In this year's top 20 ale brands, only three are down in sales, compared to 2008 figures which showed almost half were losing market share. This year, renewed interest in ale seems to have filtered through to have a positive effect on sales for the majority of the brands.

Widget beer John Smith's Extra Smooth is up 10% yet again and holds on to its number one position, thanks to its continuing promotions around the Grand National, sponsorship of which is now set to run until 2013. Last year its running mate, John Smith's Original, was in at number six and down 20%. The latest figures reveal it won back lost sales with a rise of 18% and leapfrogged McEwan's Export to take fifth place.

Shaun Heyes, S&N's head of customer marketing for off-trade, says: "Ale is still a profitable category for retailers and we have continued to lead the sector and drive investment.

"Our commitment to horseracing and darts, through John Smith's Extra Smooth, has maintained strong consumer loyalty in the category."

Boddingtons has managed to hold on to second place with sales up by a healthy 7% in 2009, compared with a 15% drop in 2008. Greene King's Old Speckled Hen is hot on its heels at number three and is now worth a hefty £31 million, up 21%. Perhaps 2010 will be the year it eclipses Boddingtons.

Greene King's take-home director Neil Jardine says around £3.5 million has been invested in marketing the brand over the past year. "The sponsorship of TV channel Dave has proven to be very successful and it continues to attract and recruit new consumers. I'm confident we can keep growing at this rate," he says.

S&N brands Newcastle Brown and McEwan's have been reaping the benefits of being managed by the Jigsaw team, and both their fortunes have improved thanks to the attention they've received.



John Smith's Extra Smooth galloped into first place again, thanks largely to its sponsorship of the Grand National

This year the brands have seen a 2% and a 1% increase in sales respectively. And new packaging for McEwan's Export, brought in just last month could drive it further.

Despite this turnaround, Newcastle Brown still faces a lot of challenges, including S&N's recent announcement it is closing its Dunston brewery in Gateshead. This will see brewing of Newky Brown move away from its Tyneside heartland to Tadcaster.

Double-digit growth

Nielsen analyst Graham Page says: "It's an interesting one but it's not the first time where an ale's point of production has changed."

Rival Tetley's is in the same position, with its Leeds brewery closing in 2011. Tetley's Smoothflow at number seven and Fuller's London Pride at number eight have both overtaken Caffrey's.

Caffrey's has had a challenging year and has dropped 17%. Number 10 brand Tetley's Original is also down 10%.

If Marston's Pedigree, stablemate Hobgoblin and Greene King's Abbot Ale all continue their impressive double-digit growth they could be hot contenders to push both Caffrey's and Tetley's Original out of the top 10 next year.

Carlsberg UK's chief executive Isaac Sheps says Tetley's remains an important brand for the brewing giant and reaffirmed his commitment to supporting it even though the brewery is closing.

Top 20 ales

Position	Brand	% change
1	John Smith's Extra Smooth	10
2	Boddingtons	7
3	Old Speckled Hen	21
4	Newcastle Brown Ale	2
5	John Smith's Original	18
6	McEwan's Export Ale	1
7	Tetley's Smoothflow	29
8	London Pride	8
9	Caffrey's	-17
10	Tetley's Original	-10
11	Hobgoblin	22
12	Marston's Pedigree	30
13	Abbot Ale	22
14	Tanglefoot Bitter	13
15	Theakston's Old Peculier	0
16	Spitfire Ale	17
17	Bombardier	2
18	Ruddles County	24
19	Greene King IPA	4
20	Bass	-5

Ale in figures

Value: £475 million
(2008: £442 million)
Change: 7%
Volume: 2.3 million hl
(2008: 2.3 million hl)
Change: 1%
Source: Nielsen year to October 3, 2009 and October 4, 2008

What's hot in the shops

Nicola Collenette quizzes three supermarket buyers about future trends in the beer market



Neil Whelpton, beer buyer at Waitrose



Dave Smith, beer buyer at Booths



Nic Storey, beer buyer at Sainsbury's

Trends to watch for in the year ahead

What new trends have you noticed in beer sales over the past year?

Neil Whelpton, Waitrose: There has been a large swing towards more premium beers. With more and more people switching to staying in, we've found they have increased their spend in the beer category and are treating themselves to something special more often. Brands such as Birra Moretti and Pilsner Urquell have seen phenomenal growth, while stalwarts such as Peroni and Beck's added fantastic value to our category.

Dave Smith, Booths: There's been a lot of interest in world beers and genuine imported beers such as Peroni, Sol, Corona and Staropramen. People are going abroad and trying to replicate the

occasion from when on holiday. The restaurant side has an impact too – nine out of 10 people will drink Peroni when eating at an Italian restaurant. People's eating habits have changed and they're experimenting more. We did a Desperados match with Mexican food in about 18 of our 26 shops and that went very well.

Nic Storey, Sainsbury's: We have seen some movement in customers trading down abv without wanting to sacrifice a premium taste. Stella Artois 4% and Beck's Vier are examples of this, with Grolsch Blond also launching just this month. Stubbies (25cl) have shown massive growth following our really bold and simple packaging redesign, combined with round-pound pricing in a financial

environment where customers are looking to really seek out great value.

What trends are you expecting to see over the next 12 months?

NW: With England having already qualified for the 2010 World Cup, it is set to be a bumper year for beer sales. There will undoubtedly be more brewers following in the footsteps of reduced-abv beer as they look to keep price down against an ever-increasing duty rate in order to remain competitive.

DS: It's going to be very interesting with England qualifying for the World Cup. I'm interested in stocking more South African brands. We brought in some Australian beers from small breweries for the Ashes and there was

a lot of interest. It gave us a point of difference as they weren't available anywhere else.

NS: I'm expecting customers to seek out increasing value – this doesn't mean just opting for cheaper beers, but good value for money. In some places this will actually involve spending more, but in exchange for much better quality. We've seen off-trade growth for some time now and there is little to suggest this will change. What customers will continue to look for is inspiration for creating quality eating and drinking experiences in their own homes. I also expect to see lager drinkers continue to trade up into world and speciality beers as they explore more challenging flavours.

Successes in the beer aisle

What beers are doing particularly well for you?

NW: All beers are doing well. Our range of PBAs continues to drive sales growth for us ahead of the rest of the market. We've done a lot this year to make the fixture clearer for customers to shop and introduced some real gems to the range that aren't available anywhere else, such as Skinner's Betty Stogs.

Our world beer fixture has also gone from strength to strength with the new mid-size packs driving sales at more than 40% year on year.

DS: World beers are doing well. Standard bitters aren't doing so well in cans and standard lagers have levelled off because of the summer. It was a bit brighter and warmer than last year – but you really need barbecue weather and we've not had that this year.

NS: Our whole range of Sainsbury's French stubbies are really performing superbly for us. They are a perfect example of where customers are realising they can still get great quality, but at excellent prices.

Preparing for the festive push

How was summer for you in terms of beer sales and what are you predicting for Christmas?

NW: July and August were cracking months for us. The hot weather in July saw sales soar, and this carried on into August and September. I'm sure Christmas sales will be equally strong.

DS: Summer was pretty good and June with Wimbledon was very good. We'll have to see how silly things get over the next couple of months. We try and be a bit different as we can't afford those silly prices. You see beer being sold more

cheaply than three years ago, even though there have been manufacturing and duty increases.

NS: We had a good summer, building on our strong corporate performance. Christmas is always an exciting time for customers, and a busy one for retailers. This one promises to be no different, with some great offers available, no doubt. I think people will be savvy and look for bargains on big sellers, but they will also trade up for Christmas as they won't be willing to sacrifice quality.

All eyes on England

Take-home lager sales for the 2010 World Cup are estimated to be worth at least £85 million finds Nicola Collenette, depending on England's success

Next year's World Cup will offer retailers "pennies from heaven", says Nielsen's Graham Page.

Research from Carlsberg, the official beer of the England team, puts it at a slightly more impressive figure. Using Nielsen data, Carlsberg estimates the incremental sales for take-home lager for the last World Cup in 2006 were worth £70 million, with a further £15 million up for grabs in 2010.

David Scott, Carlsberg UK's customer marketing director, says: "Consumers switch into lager more than any other drink while watching football." He says sales uplift is closely linked to how well the England team do in the tournament.

Gareth Jones, owner of Beer Essentials in Horsham, West Sussex, says it's crucial to start thinking about the World Cup early. "There's always the potential for sales even if England does get knocked out but it's best to start talking it up well ahead of time. It's starting in June so you need to be thinking about it several months beforehand," he says.

Scott adds: "The key thing we learned from Euro 2008 is that it's really all about England." Carlsberg found England's failure to qualify for Euro 2008 was estimated to have cost more than £35 million in beer sales alone.

He says the 2006 World Cup attracted 4.6 million more beer shopping trips than Euro 2006, with an increase of 1.3 million shoppers. With a total media spend of £10 million, Scott says marketing has been "massively" up-weighted this time round and a new TV ad will appear on screens in December to support the brand.

Budweiser is also gearing up for the event. Andreas Hilger, marketing director of Inbev UK & Ireland, says: "Over the

next several months, Budweiser will be using its official sponsorship to activate on-pack promotions across the majority of packs, which will also link to our advertising and online activity.

"This is a great opportunity for retailers to capitalise on excitement in the run-up to the tournament. Visibility in-store will be key to making this promotion work at its hardest. Retailers should take advantage of the growth of beer during the World Cup by devoting space to beer usually used for other products."

Despite its distance, South Africa shares a distinct advantage with Germany, which hosted the World Cup in 2006.

Page says: "The good news is the time zone is going to be the same as the UK."

Plato Logic's recent report "Does beer consumption increase in a World Cup Year?" found the beer market grows more when it's held on another continent rather than a close European neighbour. This is thanks to more fans staying at home to watch it on TV, although time zones and match scheduling plays a vital part.

South African sources

Ann Binns, of Bitter Virtue in Southampton, says she is looking forward to next year's World Cup. "Overall it makes a lot of difference. Up until recently, 2006 was our best year," she says. The shop, which only sells speciality beers, tried to stock beers from all the different nations taking part in the World Cup.

"Some from Africa and East Asia were difficult to source," admits Binns. "Castle beer from South Africa isn't distributed anymore but Robson's does a lager, a pale ale and some fruit beers so we'll be sourcing that."

Robson's is brewed at the Shongweni



The World Cup is expected to be more important than Christmas to lager sales

microbrewery in KwaZulu-Natal and consists of a range of beers including three tropical fruit beers, a Durban Pale Ale, an East Coast Ale and a wheat beer.

The range uses ingredients native to the region, including local mangoes, pineapples and strawberries in the fruit beer.

Michael Cook, director of imported beers at Pierhead Purchasing, which

imports Robson's, says: "We're talking to a number of retailers about doing mixed six and eight packs, each of which will feature beers from South Africa and other countries in the tournament. I'm expecting great things for Robson's."

But it's more important to have a good range of beer than an eclectic mix for the sake of it, Jones at Beer Essentials warns.



The World Cup in figures

Research from Carlsberg found that:

- 72% of adult males actively follow football
- A TV audience of 27.6 million people watched the World Cup 2006 in the UK – one person for every UK household
- 1.7 million more households bought beer in the first week of

the World Cup than the average week in 2006

- Lager sales in World Cup 2006 were more important than Christmas for grocery sales
- Beer was the best-performing grocery category, outperforming soft drinks
- 64% of the viewing audience watched England games at home.