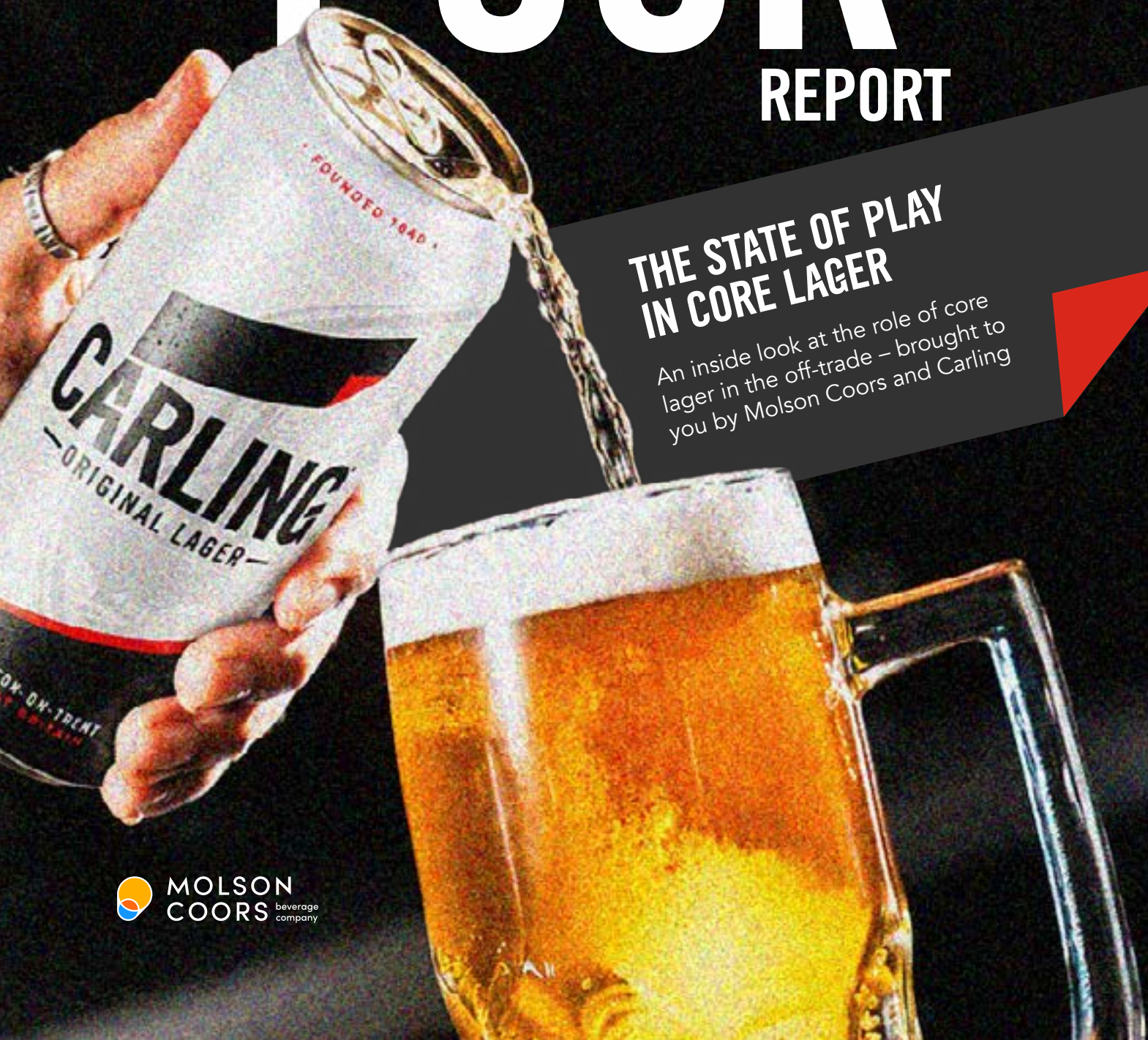




THE POUR REPORT

THE STATE OF PLAY IN CORE LAGER

An inside look at the role of core
lager in the off-trade – brought to
you by Molson Coors and Carling



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THE POUR REPORT: A NEW SOURCE OF INSIGHT AND ADVICE FOR DRINKS RETAILERS

Welcome to The Pour Report – a new source of insight for UK drinks retailers from Molson Coors, analysing some of the trends shaping how beer shows up in convenience stores, and how to maximise the opportunity.

In a year of evolution for our Carling brand, we are taking this opportunity to explore the state of play in the core lager segment, specifically: what role it's playing for retailers and why it still forms a vital part of the beer fixture in convenience stores up and down the country.

Our report comes at a time when our sector is faced by complex challenges, but also real opportunity. While the past year has tested the resilience of the convenience sector, we are seeing many retailers take significant steps forward in terms of enhancing their offering to keep shoppers coming back, and demonstrating the importance of their stores to local communities.

In this market context, the insights here aim to provide a fresh understanding of how beer shoppers perceive value, and how to calibrate a range to suit shoppers with extremely varied expectations on quality, experience and choice.

To help do that, we've combined exclusive consumer research – a poll of over 2,000 UK adults – and market data with real-world insights from convenience retailers across the UK. We've spoken to store owners from Derbyshire to Tenby to understand what's working – and what isn't. The result is a practical guide to help you make the most of core lager in your store.



Kevin Fawell

UK&I Sales Director at
Molson Coors Beverage Company



INTRODUCING OUR RETAILER PANEL

From day one, we knew we wanted **The Pour Report to include real voices. Molson Coors has one of the largest convenience retailer customer bases of any beverage company in the UK, and we wanted to showcase those businesses at the heart of this project. Industry data and polling are important, but nothing could be more valuable than hearing from you, the businesses at the coalface of this vibrant and vital sector.**

The voices in this report come from the front line. Independent retailers running convenience stores across England and Wales – from Nisa and Budgens to regional convenience groups and premium outlets.

Together, they represent a broad cross-section of the sector: different geographies, different customer bases, but all managing commercial pressures that resonate across the industry.

Throughout this report, you will hear directly from our panel – their observations on shifting consumer habits, the tactics that are driving sales, and their honest assessment of what core lager needs to do to stay relevant.



SUKHJINDER GILL
Nisa
(Derbyshire)

An independent Nisa operator with a strong local customer base.



KAM NIJJAR
Budgens
(London)

A Budgens store serving a mix of locals and seasonal visitors.



MAX BASHIR
Go Local
(Middlesbrough)

A Go Local retailer focused on new products and viral trends.



JACK MATTHEWS
Bradleys Supermarkets
(Leicestershire)

A regional convenience group serving families and professionals.



FIONA MALONE
Premier
(Tenby)

A Premier store with a stable, established customer base.

THE STATE OF THE CORE LAGER MARKET

Despite the rise of premiumisation, core lager continues to play an important role. Our research delves into where the category sits and, importantly, where it is delivering value.

Core, or standard-tier, lager brands still rank among the biggest and most popular in the UK, accounting for 17.9% of total beer volume sales in the off-trade – but the category faces real pressure. People are more health-conscious, value is under the microscope like never before, and an increasing number of customers are looking for a perceived elevated experience when drinking out of home.

Unavoidably, core lager finds itself as a category in flux at the moment, jostling for position among other segments that occupy far larger swathes of the market than they did in the past. Thinking around core lager must evolve as a consequence.

In our consumer polling, more than four in ten lager drinkers (41%) say they always or often opt for standard-tier lager over premium or craft options, compared to 24% who say they would rarely choose a standard-tier lager. Among those who would choose core, two-thirds (66%) agree it offers the best value for money compared to other beer types – with just 5% disagreeing.

That value proposition is important. Over half of lager drinkers (52%) say they're more likely to visit a shop if it offers a lager they recognise. And when a customer's usual choice isn't available, standard-tier lager is the most popular fallback – nearly two-thirds (60%) more likely to be chosen than spirits and mixers.

Core lager also punches above its weight for group occasions. When stocking up for an at-home group event like watching live sport, standard-tier lager is the most popular beer choice (24%), ahead of premium and world lager (16%).

What emerges from our research is that core, or standard-tier, lager is the linchpin of a beer range, with recognisable brands that put shoppers at ease. Core lager should be seen as the foundation of a pricing ladder up to more premium options, providing safe, trusted options to suit a variety of occasions.



DEMAND FOR CORE LAGER HAS REMAINED STRONG, WITH CARLING CONTINUING TO PERFORM AS A DEPENDABLE, HIGH-VOLUME BRAND. CORE LAGER WILL REMAIN A STAPLE CATEGORY - THE FUTURE WILL BE ABOUT BALANCING VALUE WITH QUALITY."

Jack Matthews,
Bradley's
Supermarkets



THE EVOLUTION OF THE NATION'S PALATE

For retailers, understanding how their shoppers and the wider drinking population think, choose and behave is critical to achieving a competitive advantage.

Even in a changing landscape with more choice across flavours and formats than ever for consumers to explore, many still gravitate to core lager. And the reasons go beyond simply thinking about price – experience, occasion and familiarity are all levers that retailers can pull to capitalise.

However, it is unsurprising that during a cost-of-living crisis, financial pressure is shaping decisions at the till. Among consumers who have changed how often they choose core lager, cost of living and financial hardship were the most commonly cited reasons, ahead of other trends such as moderation.

It's no surprise, then, that value for money is just as important as taste when it comes to choosing core. Price (42%) and taste (40%) are the top two factors driving core lager choice. Familiarity (27%), brand reputation (23%) and promotions (20%) also rank highly. However, only 13% of those that regularly choose core say they are influenced by ABV strength.

When asked why they choose core lager, 37% cite value for money, 31% point to familiarity and 26% say it's because it's widely available. For one in five (22%), it's simply a safe option that they can trust.

In-store promotions and discounts influence 22% of drink choices, recommendations from friends and family influence 17% and visibility at the bar or shelf influences 15%.



48%

of lager drinkers are more likely to try something new if they can see a familiar fallback lager



40%

say taste drives their choices



42%

say price is a top factor driving core lager choice



22%

of drink choices are influenced by in-store promotions

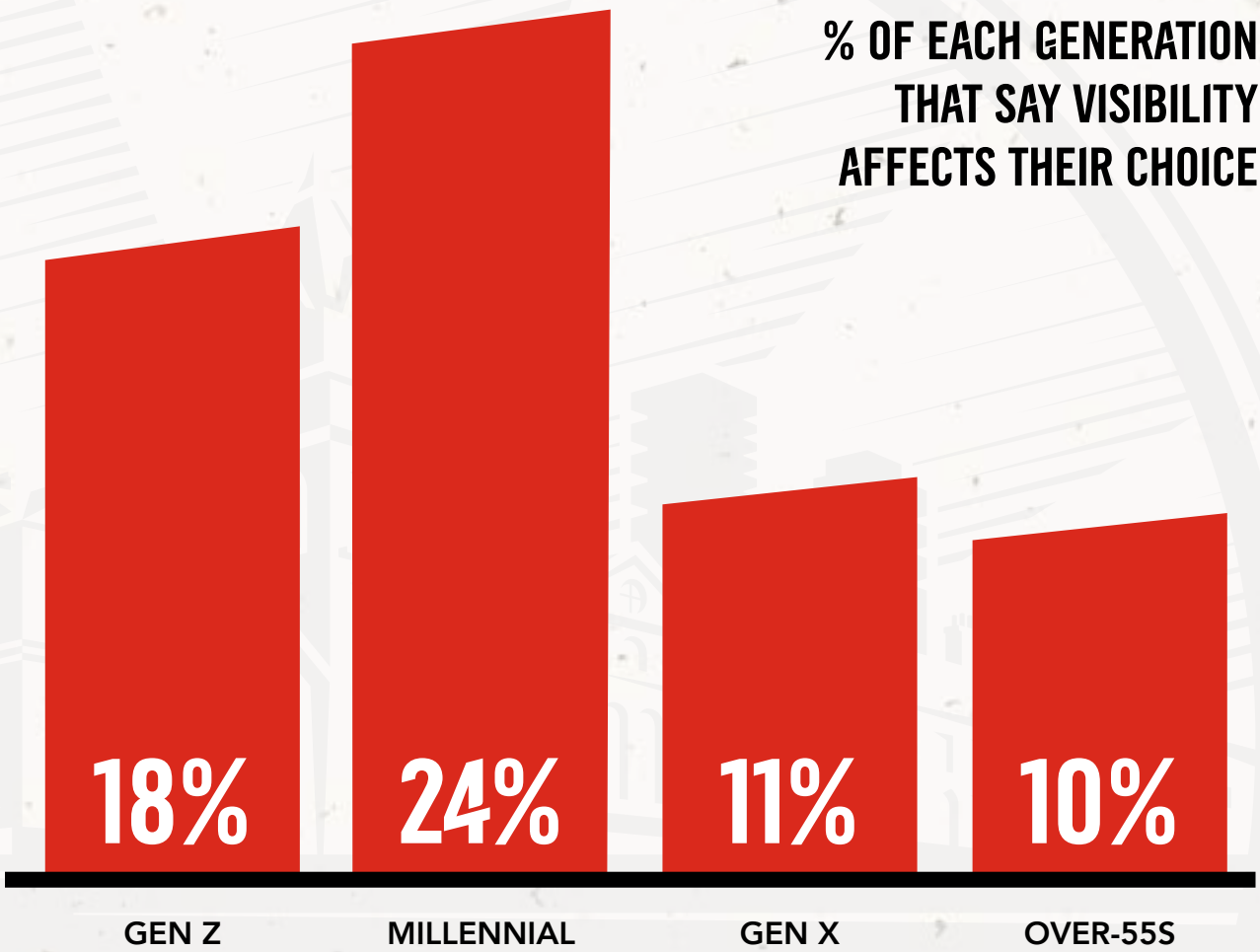
AGE IS NOT SIMPLY A NUMBER

More than half (53%) of over-55s say price is a key factor when choosing core lager – compared with fewer than three in ten Gen Z drinkers (29%). Cost sensitivity increases with age, challenging assumptions that younger consumers are the most value-led.

Meanwhile, visibility matters more to younger shoppers. Nearly one in five (18%) Gen Z and almost one quarter (24%) of millennial core lager drinkers say visibility on the shelf or at the bar affects their choice - compared with around one in ten Gen X (11%) and over-55s (10%).

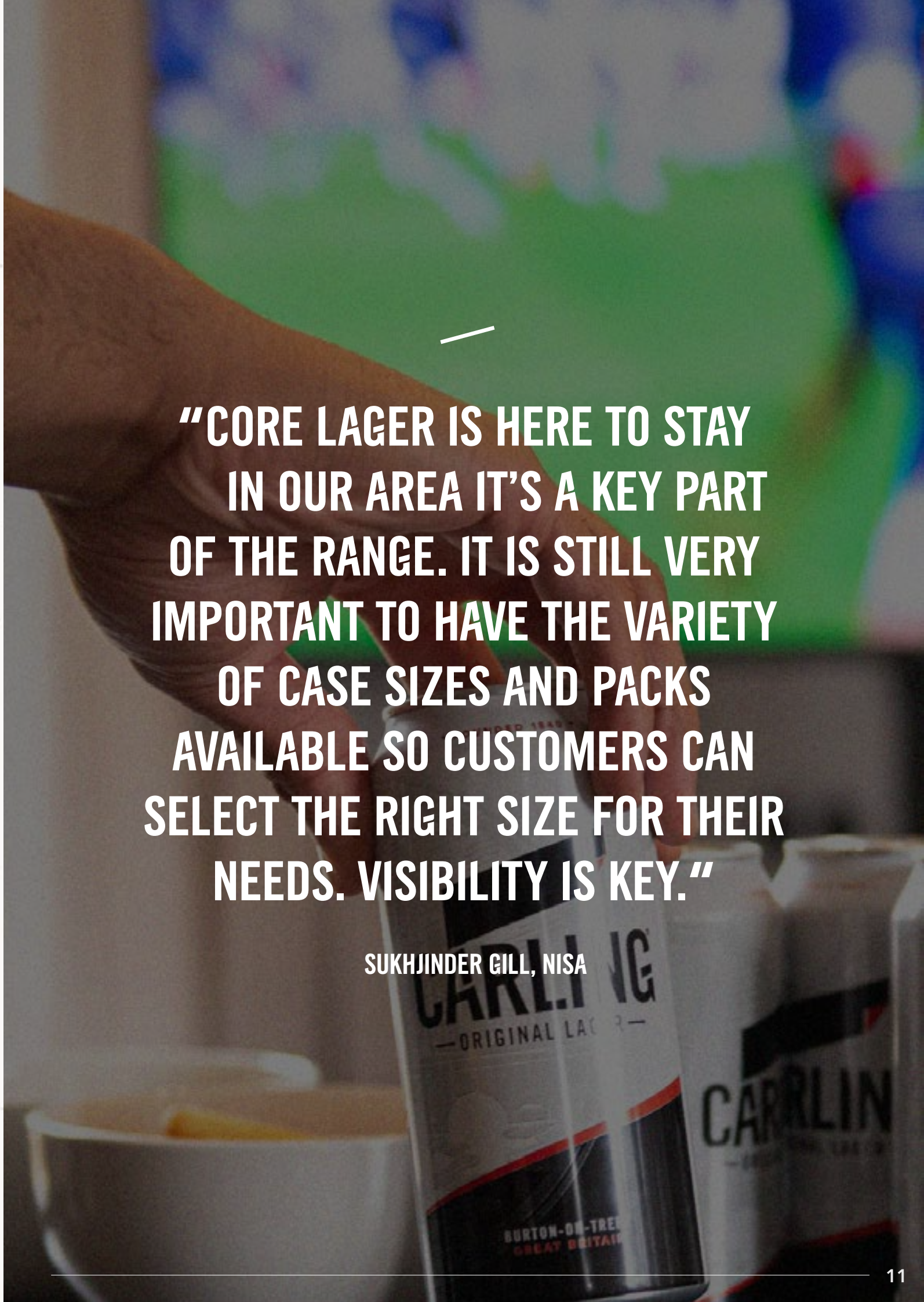
For retailers, the temptation may be to use prime shelf space exclusively to trade customers up to higher-margin world beers and craft options. But our research suggests a more balanced approach pays off.

Familiar brands create a safety net effect that has a noticeable impact on sales. Nearly half of lager drinkers (48%) say they're more likely to try something different if they can see a familiar core lager to fall back on. In other words, visible core lager doesn't hold back premium sales – it enables them. Shoppers feel more confident experimenting when they know a trusted option is close at hand.



“CORE LAGER IS HERE TO STAY
IN OUR AREA IT’S A KEY PART
OF THE RANGE. IT IS STILL VERY
IMPORTANT TO HAVE THE VARIETY
OF CASE SIZES AND PACKS
AVAILABLE SO CUSTOMERS CAN
SELECT THE RIGHT SIZE FOR THEIR
NEEDS. VISIBILITY IS KEY.”

SUKHJINDER GILL, NISA



THE ROLE OF LAGER DURING KEY CALENDAR MOMENTS

It's easy to think of core lager as a steady background note, but our research uncovers very notable correlations between big seasonal and occasion-based sales opportunities, and how people interact with the category.

Core lager's broad appeal makes it a natural fit for social occasions – but for convenience retailers, knowing how and when customers shop is what turns that popularity into sales.

When we asked lager drinkers which occasions they associate with standard-tier lager, the answers pointed to social and seasonal moments: Christmas socialising (40%), summer drinks (35%), nights out (34%), BBQs (32%), big sporting events (27%), at-home gatherings (26%) and bank holidays (22%).

Summer is the peak moment – 41% say that's when they're most likely to purchase. But 31% of drinkers say they consume lager equally across seasons, making a consistent year-round range just as important as being well stocked for the warmer months.

Getting the right format mix is critical. For at-home gatherings, multipack cans are most popular – followed by multipack and single bottles. For big sporting events, single bottles lead, followed by draught (for those going to the pub) and single cans. For BBQs and summer drinks, bottles dominate in singles and multipacks.

When asked what would improve their in-store experience, shoppers gave practical answers: 34% want better promotions and discounts, 22% want clearer pricing and shelf signage, and 22% cited better product availability. More chilled stock also features – and it matters most to younger shoppers, with 30% of 18-24s flagging it versus just 12% of over-55s.

40%

of core lager drinkers
associate it with
Christmas socialising

41%

say summer is when
they're most likely
to purchase lager

34%

say better promotions
and discounts would
most improve their
buying experience



“

The conversation around beer often focuses on what's new, but this research highlights why established brands remain so important. Even as tastes evolve and consumers have more choice than ever, familiarity still matters. Few brands exemplify that more than Carling – the lager most associated with football and part of British culture for decades.

“Core lagers like Carling give drinkers something to rely on, which is particularly important in those moments that bring people together. From live sport to summer barbecues, drinkers want to feel confident in what they're buying without compromising on the experience – and that's exactly where core lager earns its place.”



HANNAH NORBURY
UK&I Marketing Director at
Molson Coors Beverage Company

THIS SUMMER'S WORLD CUP WAS A BIG DRIVER FOR CORE LAGER SALES, ALONG WITH SUMMER EVENTS, BBQS AND BANK HOLIDAYS BOOSTED BY GOOD WEATHER. AT CHRISTMAS, IT'S MORE CHALLENGING AS CUSTOMERS TEND TO BUY FROM THE BIG SUPERMARKETS IN LARGE CASE FORMATS."

Sukhjinder Gill,
Nisa



WITH SPORT, PEOPLE ALWAYS LOOK FOR LAGER DEALS. CARLING DEALS ARE GREAT - FREE FOOTBALL PROMOTIONS, THEY ALL MAKE A BIG DIFFERENCE."

Kam Nijjar,
Budgens



WE MAKE SURE WE HAVE GOOD AVAILABILITY AND PLAN AHEAD FOR EVENTS. WE KEEP THE FRIDGE COLDER AND MERCHANDISE THE WHOLE DEPARTMENT."

Fiona Malone,
Premier



THE RIGHT FORMATS FOR THE RIGHT OCCASIONS

Multipacks come into their own when shoppers are hosting or stocking up. They're easy to share and strong on value, and a safe bet for big groups. In these moments, a well-known core lager is often the go-to: familiar, reliable, and unlikely to disappoint.

For those not ordering a draught pint in a pub or bar, singles are the format of choice for more immediate, on-the-day purchases, whether that's a couple of bottles for tonight, something to grab on the way to a BBQ or before kick-off - showing that those big midweek games still present a significant sales opportunity. That's why single bottles index so strongly around sport, seasonal get-togethers, and spontaneous summer occasions.

THE TOP THREE PREFERRED FORMATS BY OCCASION

	1	2	3
At home gatherings			
Big sporting events			
BBQs			
Summer drinks			
Christmas socialising			
Bank holidays			

KEY



Single cans



Draught



Single bottles



Multipack bottles



Multipack cans

RETAILER INNOVATION SPOTLIGHT

There's no single formula for driving sales – but retailers across the off-trade are finding creative ways to boost performance. In this section, we ask our retailer panel what's working for them.

THE INCENTIVES GAME

"It's all an incentives game," says Kam Nijjar of Budgens in London. "What can I get if I buy X, Y and Z? Free glassware, Carling deals, free football promotions – they all make a big difference."

Sukhjinder Gill has found success linking physical promotions with digital engagement: "Create more in-store theatre and link deals to big tournament competitions on social media – offer free footballs or drink/beer packs if you guess the correct score in a particular game."



THE CHILLER IS KING

Sometimes the most effective tactics are the simplest. Nijjar has found that chilling multipacks makes a genuine difference.

"People prefer the fridge packs," he explains. "Keep 10-packs in the chiller so people have cold cans." On a hot day, or on the way to watch the football, who wants to wait for their beer to cool down?

EYE LEVEL IS BUY LEVEL

Visibility matters more than ever. "Make eye-level stacks of lager," says Nijjar. "A lot of customers are lazy when browsing and will just pick up the first thing they see."

Max Bashir of Go Local agrees: "Visibility is massively important. Having prime place in the chiller is definitely key."

Jack Matthews of Bradleys Supermarkets takes the same view: "Good visibility directly translates into increased sales. Products perform strongly when placed in high-traffic areas."

STAYING AHEAD OF THE CURVE

Bashir has built his store's reputation on speed to market: "Being first to viral products has become really important for us. We've created a reputation that customers know we will have all the new and viral products in first."

For retailers plugged into social media trends, there's real competitive advantage in being the store that always has the new thing first.

STOCK WHAT THEY DRINK IN THE PUB

Perhaps the simplest advice comes from Nijjar, who has found that aligning his range with local on-trade preferences pays dividends.

"See what local pubs are selling – ask people, 'What do you drink in the pub?' Then stock what they tell you," he says. "If they drink it in the pub, they'll want to buy it in the shop."

It's a useful reminder that for many customers, the off-trade occasion is an extension of the on-trade experience. Match the two, and you make the purchase decision easy.

TAKING ACTION

Data and insights are useful, but we know retailers want real advice on how to put them into action to help their stores.

5 STEPS TO DRIVING CORE LAGER SALES IN THE OFF-TRADE

01

Maximise availability and visibility.

22% of shoppers say clearer signage would improve their experience; another 22% cite out-of-stocks as a frustration. Promotions matter too – deals influence 22% of purchasing decisions, and 34% want better in-store offers. As Fiona Malone says: “Align promotions with sporting events and look for unique opportunities – an ice bucket giveaway gave us a 100% sales uplift.”

02

Keep stock chilled.

20% of shoppers want more chilled stock – rising to 30% among 18-24s. Impulse purchases are driven by immediacy. As Kam Nijjar notes: “People prefer fridge packs. Simple changes like chilling stock already make a difference.”

03

Stock a range of formats.

Different occasions demand different formats. Multipack cans lead for at-home gatherings; single bottles dominate for sporting events and BBQs. Align your range with the occasions your customers are shopping for.

04

Prepare early for key moments.

Sporting moments, alongside summer and BBQ season, drive the biggest sales spikes. Christmas matters less in convenience, with customers doing larger shops in supermarkets. But make sure you're ready for the last-minute stock-up mission.

05

Use incentives and giveaways.

On-pack deals, branded glassware and event-linked promotions consistently drive conversion. As Kam Nijjar puts it: “It's all an incentives game; what can I get if I buy X, Y and Z?”



ABOUT CARLING

Carling is the best-selling core lager brand in Great Britain¹. Brewed in Burton upon Trent, a town synonymous with British brewing heritage, it uses locally sourced ingredients to deliver the balanced taste that has made it a firm favourite with beer drinkers across the UK.

Rooted in British culture and communities, Carling is the lager brand consumers most associate with football². Its connection to the beautiful game spans decades, supported by long-standing investment in grassroots initiatives and sponsorship of major competitions including the Emirates FA Cup and Adobe Women's FA Cup.

As one of the UK's leading beer brands, Carling has earned its place at the heart of the nation's drinking culture. Known for its quality and accessibility, it remains a trusted choice for consumers across a wide range of occasions. Built around its "Beer of Mates" ethos, the brand has long been associated with bringing people together, whether that's over a pint at the local pub, watching live sport or spending time with friends and family.

Carling is part of the Molson Coors Beverage Company portfolio, one of the UK's leading brewers, which includes brands such as Coors, Madrí Excepcional, Pravha, Staropramen, Cobra and Doom Bar. Together, these brands help consumers celebrate life's moments and support customers across the on- and off-trade.



METHODOLOGY

Consumer research was conducted by Censuswide among a sample of 2,001 UK adults aged 18+. Fieldwork was carried out between 3-5 December 2025. Censuswide abides by and employs members of the Market Research Society, follows the MRS code of conduct and ESOMAR principles, and is a member of the British Polling Council. Retailer insights were gathered through in-depth interviews with a panel of off-trade retailers from across the UK.

¹ CGA GB On Trade Volume 52 w/e 16-May-2026 / Circana GB Off Trade 52 w/e 16-May-2026

² ProQuo "Which of the following brands do you most associate with football?" 19 May 2023 to 31 March 2025)



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