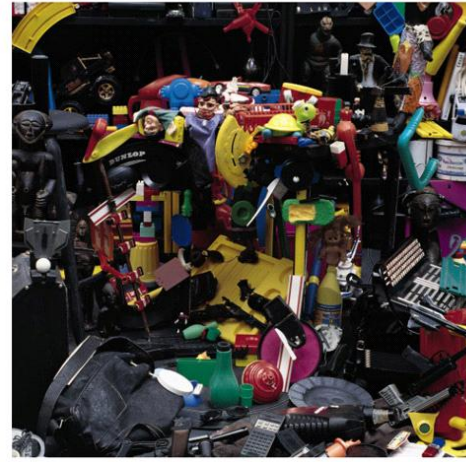




DON QUIXOTE AND HIS FAITHFUL COMPANION SANCHO PANZA?
OR DON QUIXOTE WITHOUT HIS FAITHFUL COMPANION SANCHO PANZA?



THE INGREDIENTS FOR A HEARTY STEW?
OR THE PORTRAIT OF A GARDENER?



A KID'S MESSY ROOM?
OR A PORTRAIT OF CHE GUEVARA?

Alcohol Price and Consumer Behaviour

Main results



Nobody's Unpredictable





Executive Summary

- The Brewers of Europe have charged IPSOS with conducting a survey assessing:
 - the effect of price increases of alcoholic beverages on consumers' purchasing and drinking patterns; and
 - European citizens' perceptions of the most effective measures to help reduce alcohol-related harm.
- The poll was carried out online during February and March 2009 in Denmark, Portugal, Czech Republic, and Germany.
- The sample size consisted of 1,000 interviews per country, chosen according to gender, age and region.
- The four countries surveyed were chosen as fairly representative of the different cultures, behaviours and attitudes of their respective regions - Northern, Southern, Eastern and Western Europe.

Key findings of the survey include:

- **The vast majority of Europeans are responsible consumers of alcoholic beverages** and only a small percentage regularly binge drinks or consumes over the recommended guidelines.
- **For 94% of Europeans, price is not the key criterion** when it comes to purchasing alcoholic beverages. For 46% taste is the main determinant, followed by the occasion for (or during) which the purchase is being made and the consumer's mood at that time.
- **Young adults, who comprise the largest group of people who 'binge drink', would be the least likely to reduce their alcohol consumption because of a price increase** – even of as much as 25%. Rather than reducing their alcohol consumption, they would instead tend to change their purchasing behaviour, e.g. turning to cheaper drinks, buying more in shops and less in bars, switching to other categories, etc.
- The minority of respondents who **regularly (6.2% of all adults surveyed) or occasionally (6.6% of all adults surveyed) drink irresponsibly are less likely than other consumers to reduce their alcohol consumption** in response to price increases. Hence, only 1.8% of all respondents fall into the category of being regular irresponsible drinkers who would drink less in general following a price increase.*
- Over 90% of the people who consume alcoholic drinks said that it is **not the drinks themselves but the abuse of alcohol that is the problem**. They argue that every consumer should be trusted to decide how much he or she drinks.

**This survey does not provide data on by how much these regular excessive drinkers would reduce their consumption.*

- Over 90% of Europeans also responded that instead of price increases **the focus should rather be on better education and information** about the effects of alcohol consumption and **proper law enforcement** in cases of alcohol abuse.
- The main message that can be drawn from this survey is that **raising prices completely misses the target audience and would not solve the problem of alcoholic misuse**, i.e. regularly drinking over recommended guidelines or binge drinking. Instead, price increases are most likely to impact the consumption levels of those who drink in moderation and responsibly.

Explanations:

- Even though only 4 countries and 4000 EU adult citizens were surveyed, the survey does represent a useful contribution to the study of consumer drinking and purchasing behaviours across the EU.
- The results can be helpful and should be used to inform the debate among policy makers, industry stakeholders and media in relation to alcohol pricing and consumer behaviour.



Executive Summary

About IPSOS

- IPSOS is an independent company, founded in 1975 and now present in 64 countries, whose sole focus is survey-based market research.
- For more on IPSOS, visit www.ipsos.com

About The Brewers of Europe

- The Brewers of Europe, founded in 1958 and based in Brussels, is the voice of the European brewing sector to the European institutions and international organisations.
- It has 27 members, comprising 24 national brewers' associations from EU Member States plus Norway, Switzerland and Turkey. Of the roughly 3,000 brewers across Europe, the vast majority are small and medium-sized, local and family-run establishments.
- Today, 2.6 million jobs are directly and indirectly attributable to the European brewing sector.
- For more on The Brewers of Europe, visit www.brewersofeurope.org



Presentation of the survey



1. General background & objectives

The Brewers of Europe asked Ipsos Belgium to carry out an opinion poll amongst the citizens of four European countries, in order to assess:

- the overall state of consumption habits
- the impact of a significant price increase on behaviour
- people's perception of the most efficient measures to help reduce alcohol abuse



The Brewers of Europe

- **The Brewers of Europe**, founded in 1958 and based in Brussels, is the voice of the European brewing sector to the European institutions and international organisations.
- It has 27 members, comprising 24 national brewers' associations from EU Member States plus Norway, Switzerland and Turkey. Of the roughly 3,000 brewers across Europe, the vast majority are small and medium-sized, local and family-run establishments.
- Today, over 2.5 million jobs are directly and indirectly attributable to the European brewing sector.
- For more on The Brewers of Europe, visit www.brewersofeurope.org



Ipsos Belgium

- Ipsos Belgium is the leading research agency in Belgium, and a unique centre of excellence for international opinion research.
- It is specialised in international coordination and social and opinion research is one of its main areas of activity.
- No less than 300 clients are served every year by 60 research specialists, generating an annual turnover of 11 million Euro in the framework of just below 700 projects. Ipsos Belgium conducted about 700.000 interviews last year.
- Ipsos Belgium has conducted research on behalf of institutions, governments, corporations, industry, professional associations and the non-profit sector for more than 30 years.
- For more on Ipsos Belgium, visit www.ipsos.be

2.1. Target population

Adult (18 years and older) population of Czech Republic, Denmark, Germany and Portugal.

2.2. Sample size

1000 interviews per country, representative of the natural population according to gender, age and region. Quotas were set to guarantee representativity on the three criteria.

2.3. Interview Technique

The interviews were carried out on-line, from February 27 to March 5, 2009.

2.5. Sample profile

		GLOBAL N=3995	CZ N=997	DK N=1000	GE N=1000	PT N=998
Gender	Male	50%	50%	50%	50%	50%
	Female	50%	50%	50%	50%	50%
Age	18 up to 25 year old	15%	16%	14%	15%	16%
	26 up to 34 year old	20%	23%	19%	16%	22%
	35 up to 54 year old	44%	40%	45%	49%	43%
	55 years old and more	21%	22%	23%	20%	19%
Family Status	Single	33%	26%	33%	34%	39%
	In partnership	21%	20%	27%	24%	14%
	Married	46%	54%	40%	41%	47%
Children	Yes	62%	71%	61%	57%	57%
	No	38%	29%	39%	43%	43%
Income	<1000 euros	19%	40%	5%	17%	16%
	1000-1500 euros	22%	37%	7%	18%	28%
	1500-3000 euros	26%	13%	23%	35%	32%
	3000-5000 euros	3%	1%	26%	13%	10%
	>5000 euros	8%	2%	24%	2%	3%
	DK/Refusal	12%	8%	15%	15%	11%

Results



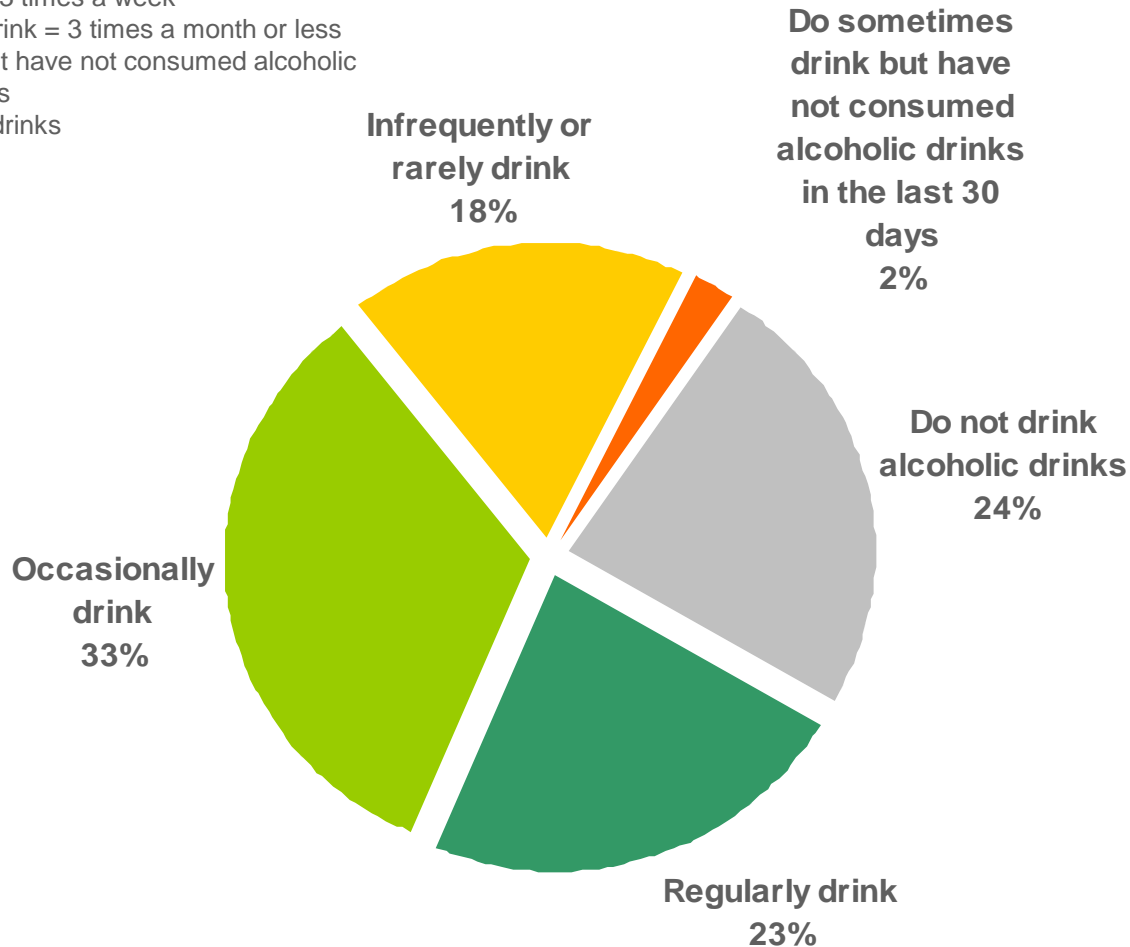
1. Consumption habits



How often did Europeans consume alcoholic drinks in the last 30 days?

- Regularly drink = 4 times a week or more
- Occasionally drink = 1-3 times a week
- Infrequently or rarely drink = 3 times a month or less
- Do sometimes drink but have not consumed alcoholic drinks in the last 30 days
- Do not drink alcoholic drinks

Base : Total surveyed population n=3995



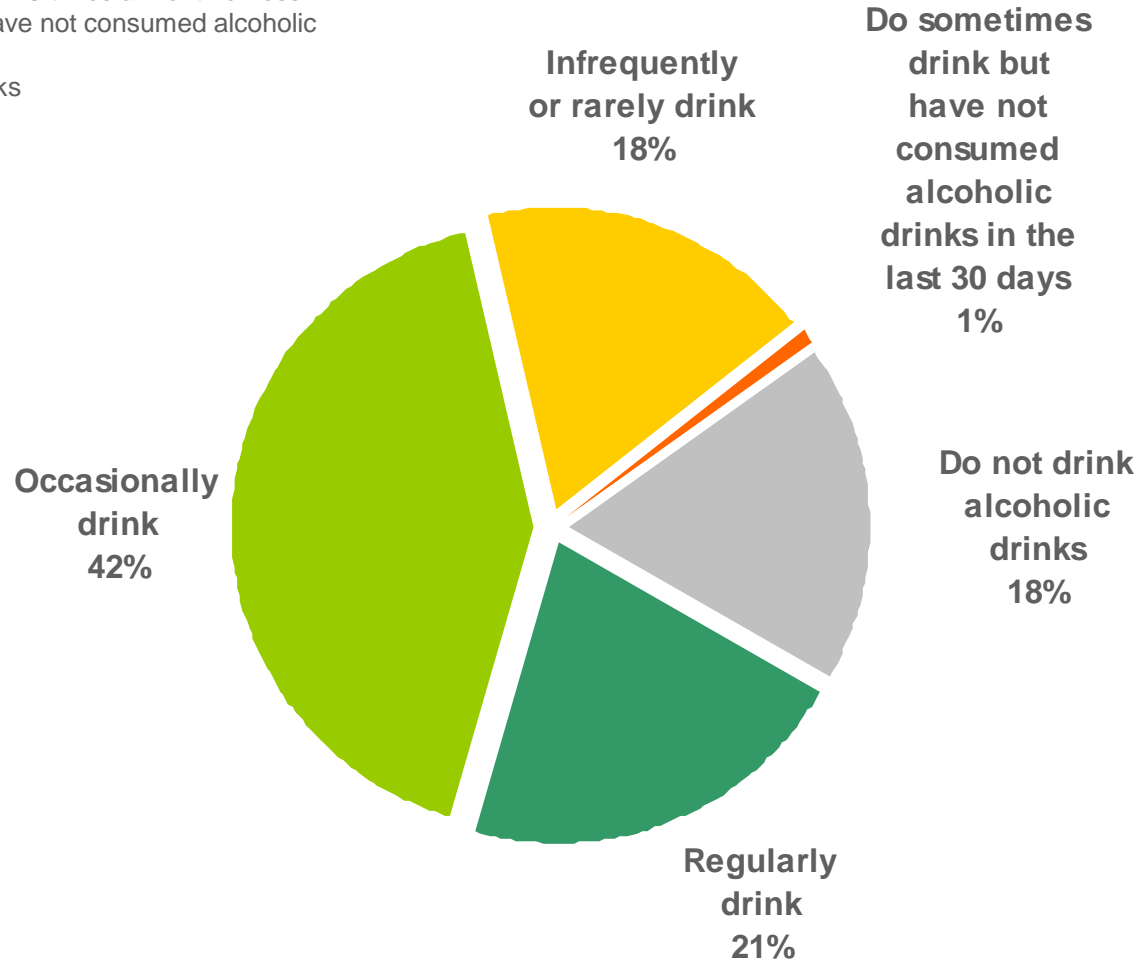


How often did Czechs consume alcoholic drinks in the last 30 days?

- Regularly drink = 4 times a week or more
- Occasionally drink = 1-3 times a week
- Infrequently or rarely drink = 3 times a month or less
- Do sometimes drink but have not consumed alcoholic drinks in the last 30 days
- Do not drink alcoholic drinks

Czech Republic

Base : Total surveyed population in CZ n=997



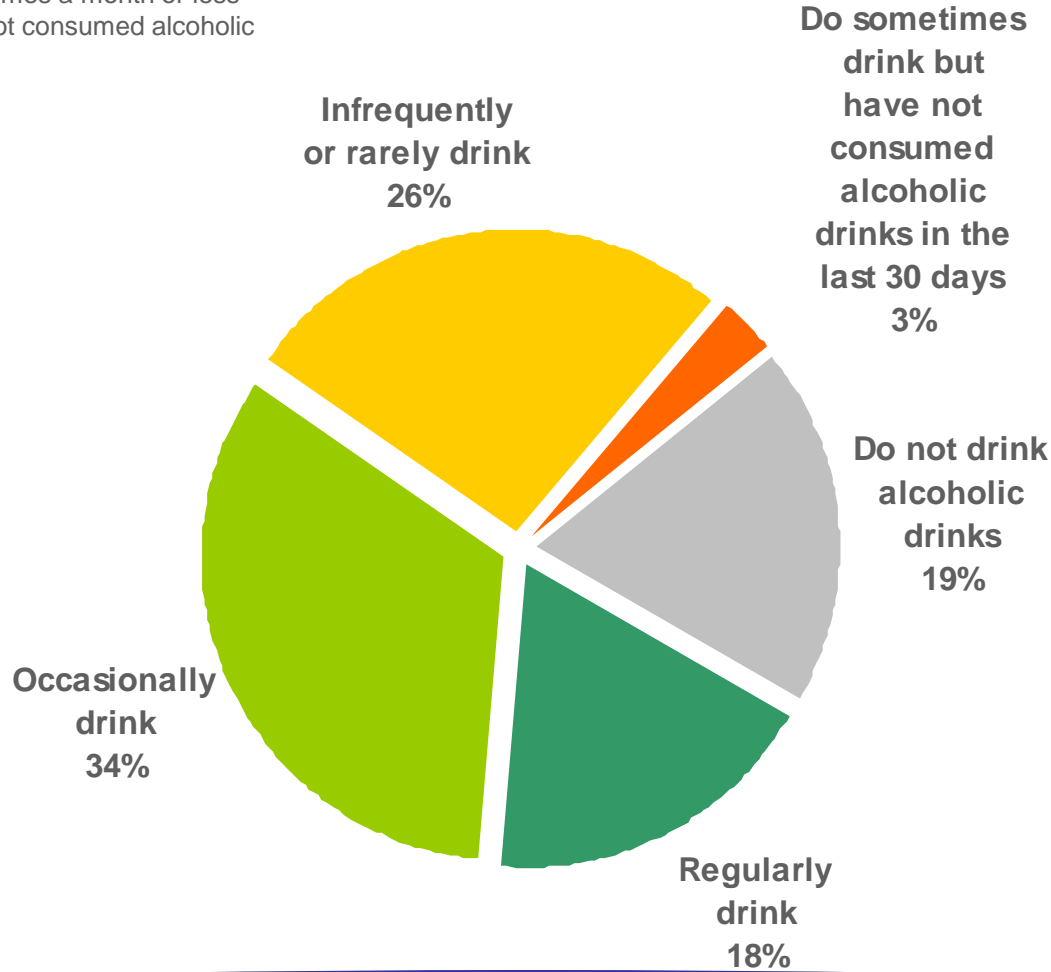


How often did Danes consume alcoholic drinks in the last 30 days?

- Regularly drink = 4 times a week or more
- Occasionally drink = 1-3 times a week
- Infrequently or rarely drink = 3 times a month or less
- Do sometimes drink but have not consumed alcoholic drinks in the last 30 days
- Do not drink alcoholic drinks

Denmark

Base : Total surveyed population in DK n=1000



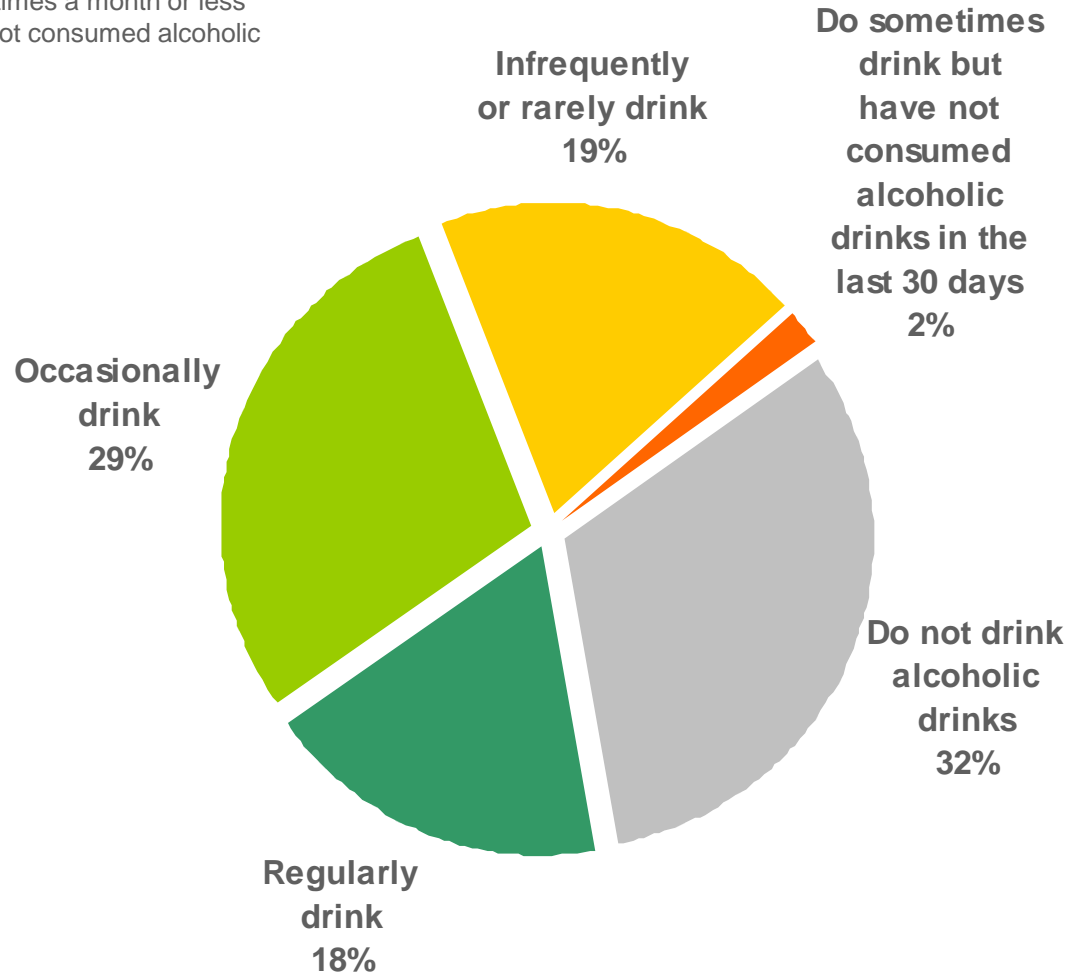


How often did Germans consume alcoholic drinks in the last 30 days?

- Regularly drink = 4 times a week or more
- Occasionally drink = 1-3 times a week
- Infrequently or rarely drink = 3 times a month or less
- Do sometimes drink but have not consumed alcoholic drinks in the last 30 days
- Do not drink alcoholic drinks

Germany

Base : Total surveyed population in DE n=1000

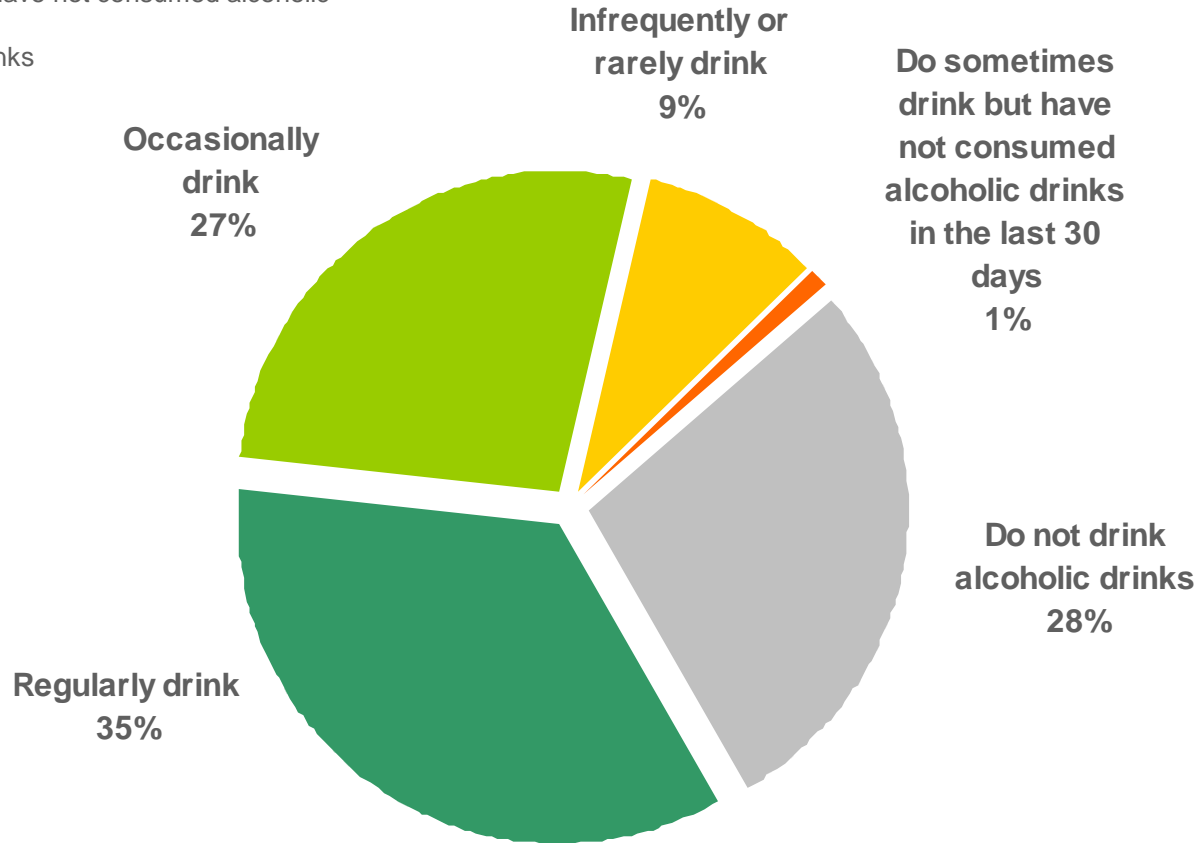


How often did Portuguese consume alcoholic drinks in the last 30 days?

- Regularly drink = 4 times a week or more
- Occasionally drink = 1-3 times a week
- Infrequently or rarely drink = 3 times a month or less
- Do sometimes drink but have not consumed alcoholic drinks in the last 30 days
- Do not drink alcoholic drinks

Portugal

Base : Total surveyed population in PT n=998

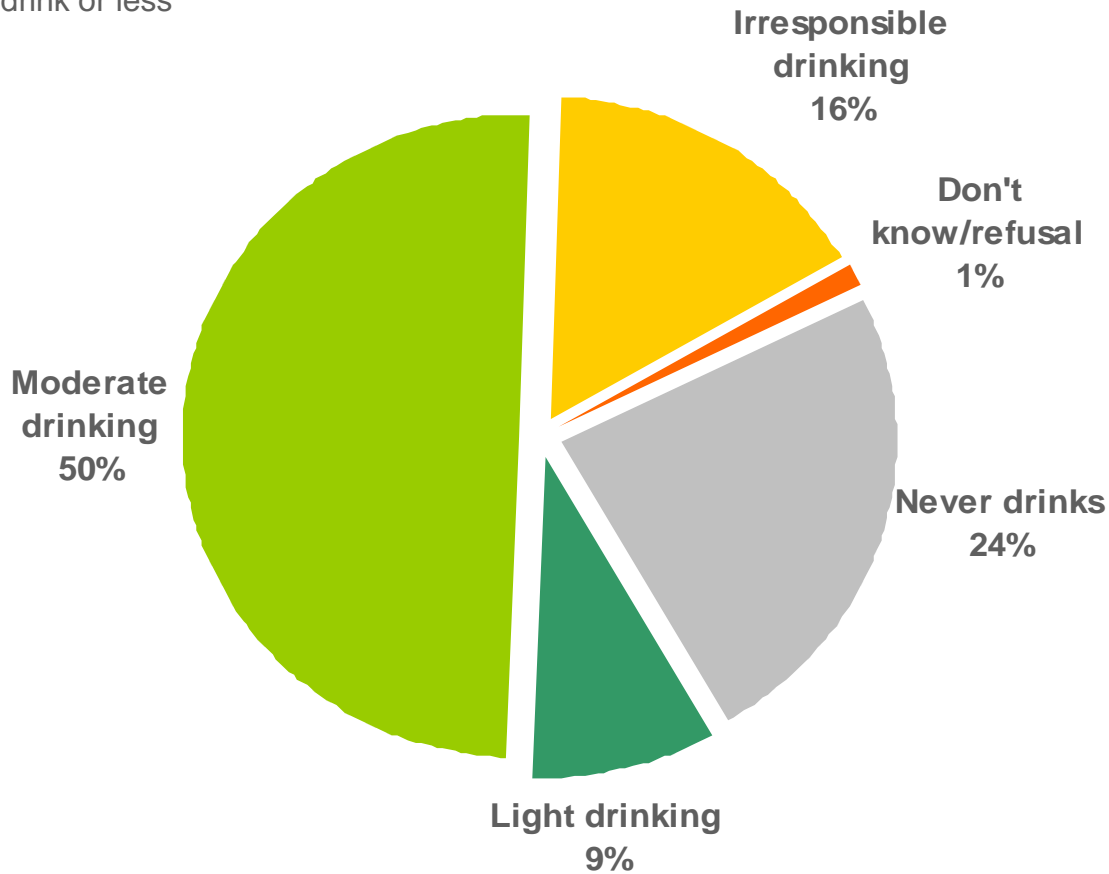




On a typical drinking occasion, how much do Europeans usually drink?

Irresponsible drinking = 5 drinks or more
Moderate drinking = 2-4 drinks
Light drinking = 1 drink or less
Never drinks

Base : Total surveyed population n=3995



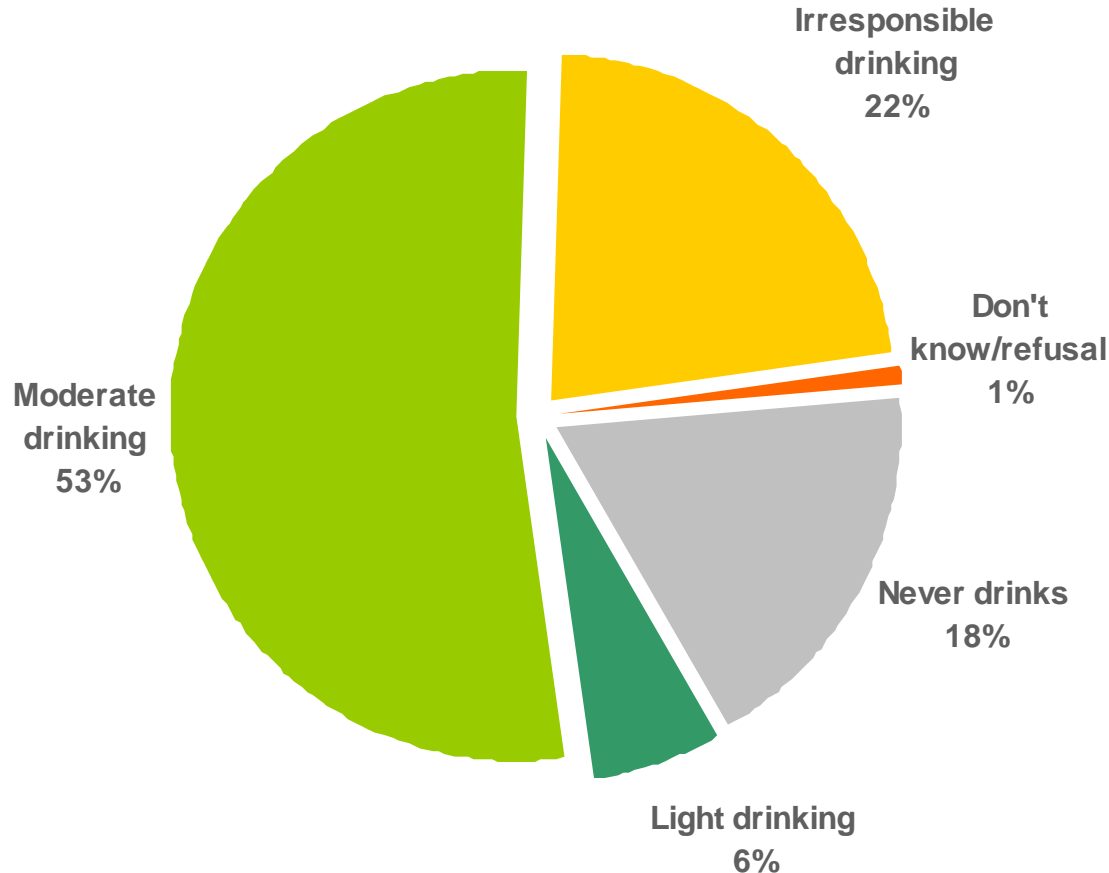


On a typical drinking occasion, how much do Czechs usually drink?

Irresponsible drinking = 5 drinks or more
Moderate drinking = 2-4 drinks
Light drinking = 1 drink or less
Never drinks

Czech Republic

Base : Total surveyed population in CZ n=997



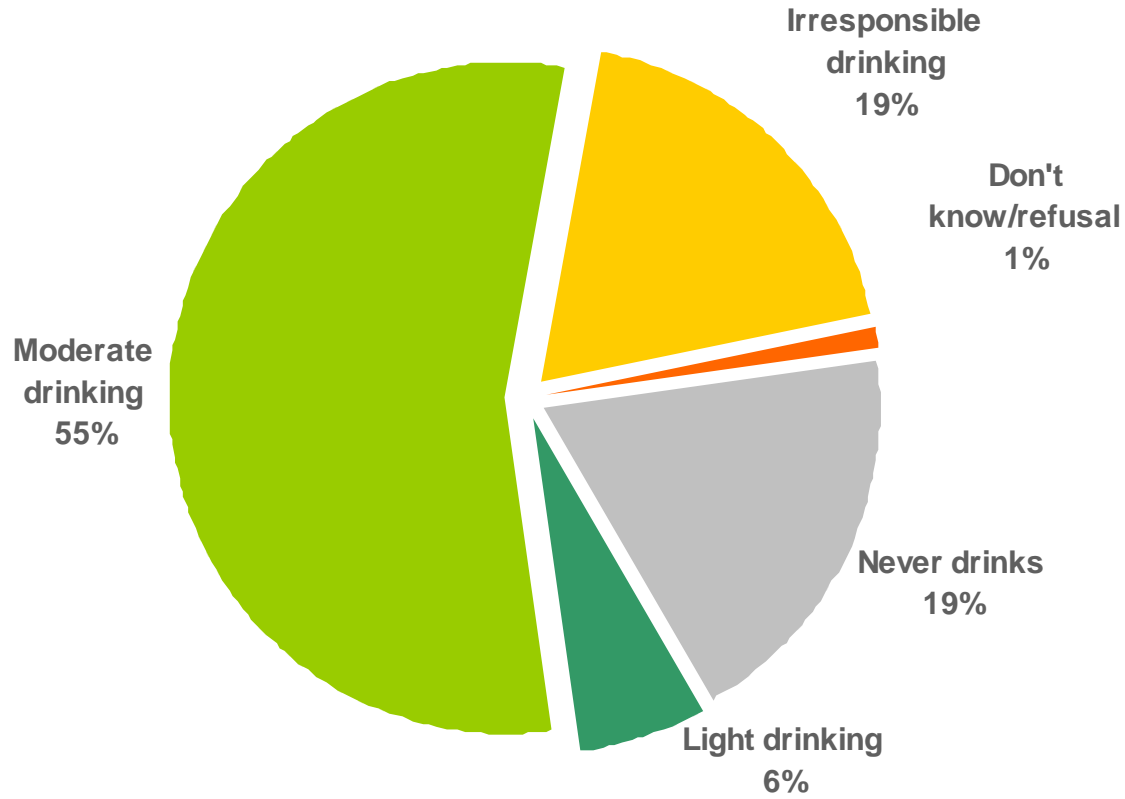


On a typical drinking occasion, how much do Danes usually drink?

Irresponsible drinking = 5 drinks or more
Moderate drinking = 2-4 drinks
Light drinking = 1 drink or less
Never drinks

Denmark

Base : Total surveyed population in DK n=1000



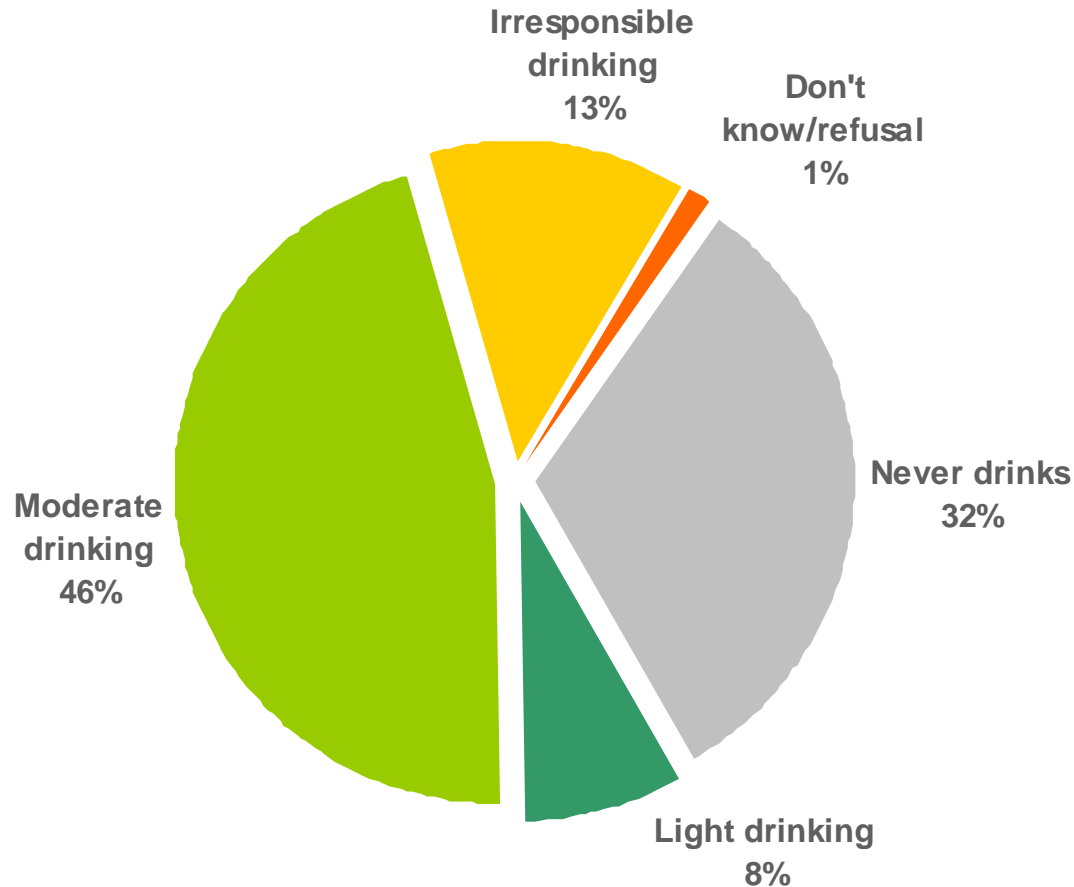


On a typical drinking occasion, how much do Germans usually drink?

Irresponsible drinking = 5 drinks or more
Moderate drinking = 2-4 drinks
Light drinking = 1 drink or less
Never drinks

Germany

Base : Total surveyed population in DE n=1000



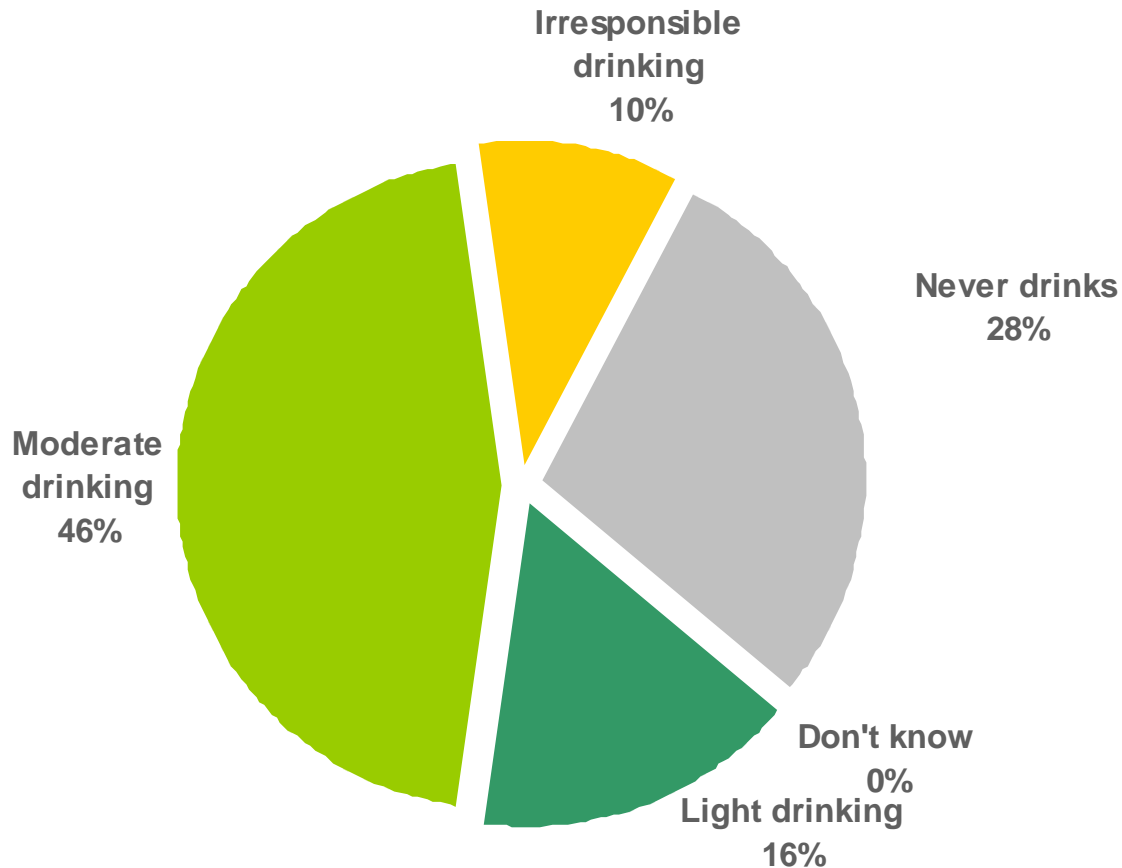


On a typical drinking occasion, how much do Portuguese usually drink?

Irresponsible drinking = 5 drinks or more
Moderate drinking = 2-4 drinks
Light drinking = 1 drink or less
Never drinks

Portugal

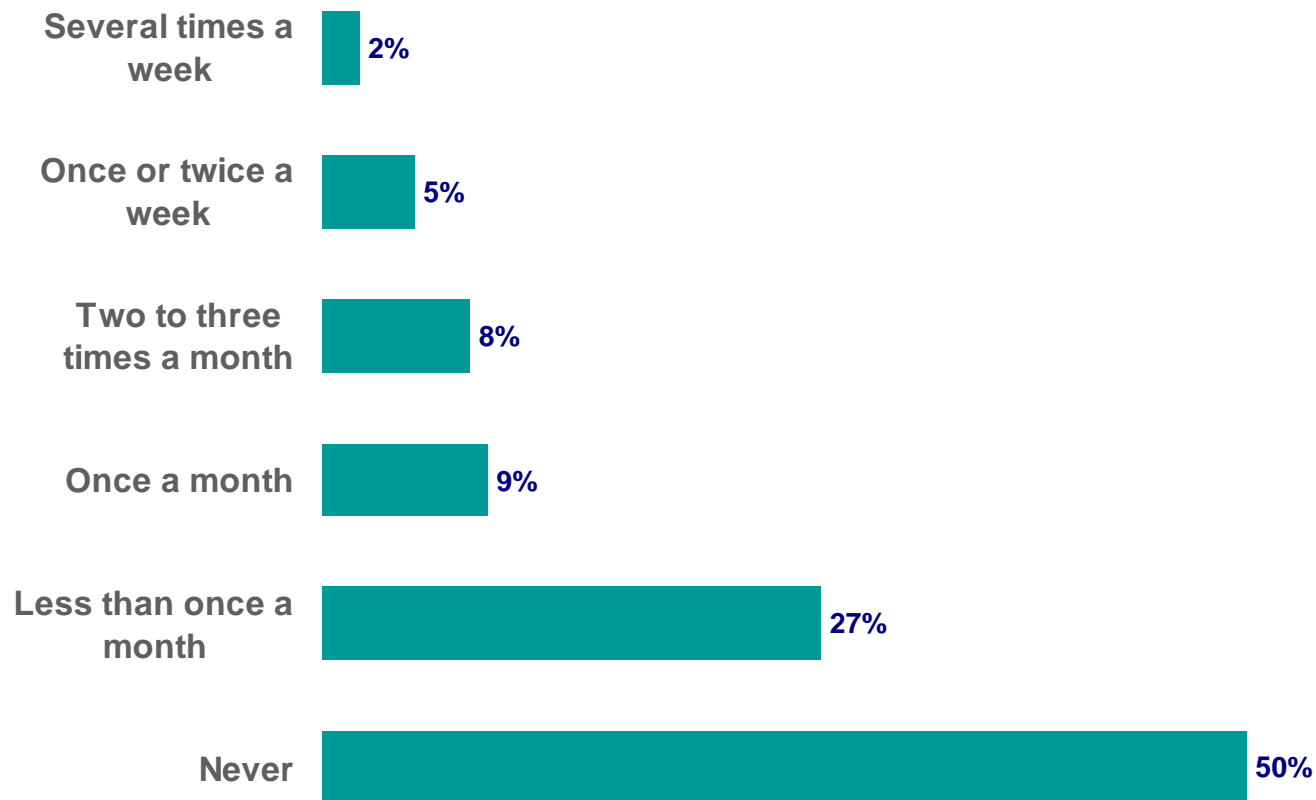
Base : Total surveyed population in PT n=998





How often do Europeans drink 5 or more drinks in a short period of time, e.g. a couple of hours?

Base : Total surveyed population n=3995

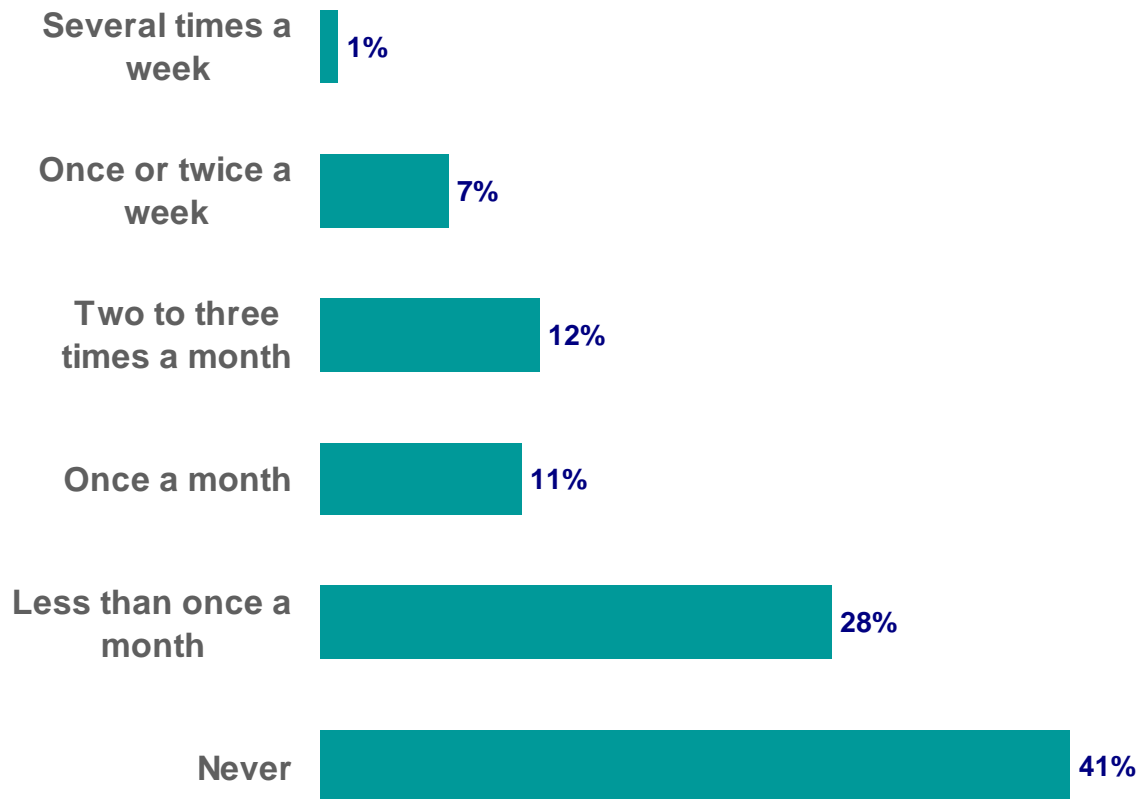




How often do Czechs drink 5 or more drinks in a short period of time, e.g. a couple of hours?

Czech Republic

Base : Total surveyed population in CZ n=997

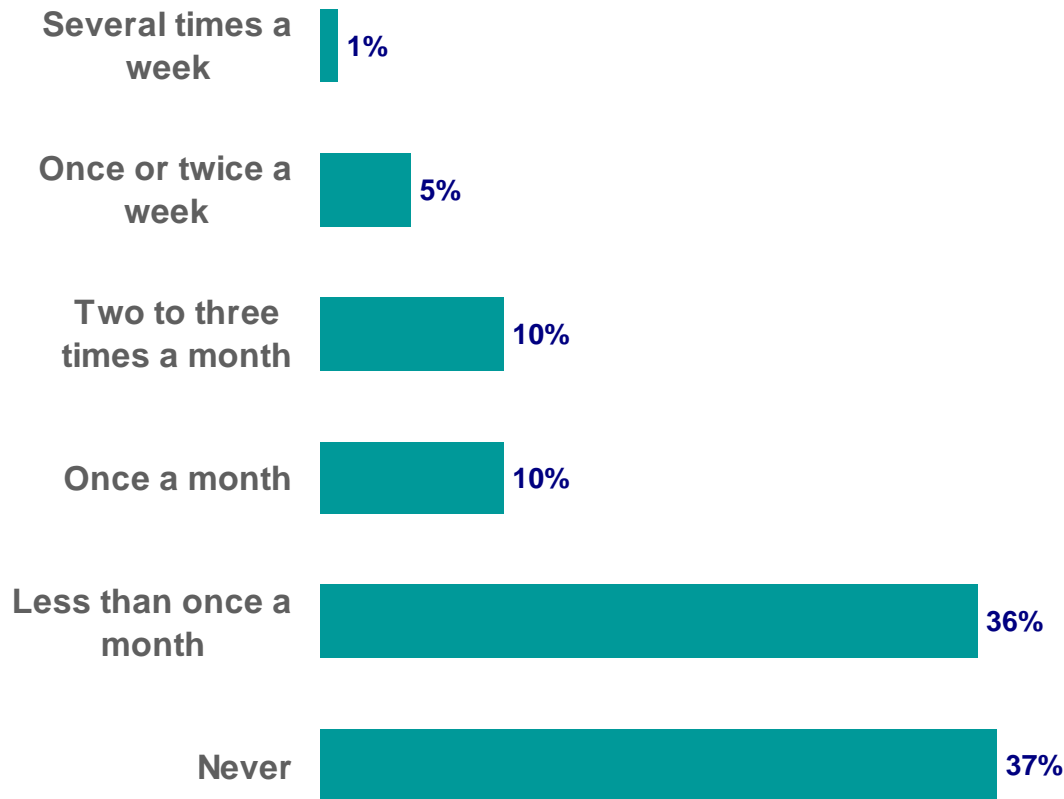




How often do Danes drink 5 or more drinks in a short period of time, e.g. a couple of hours?

Denmark

Base : Total surveyed population in DK n=1000

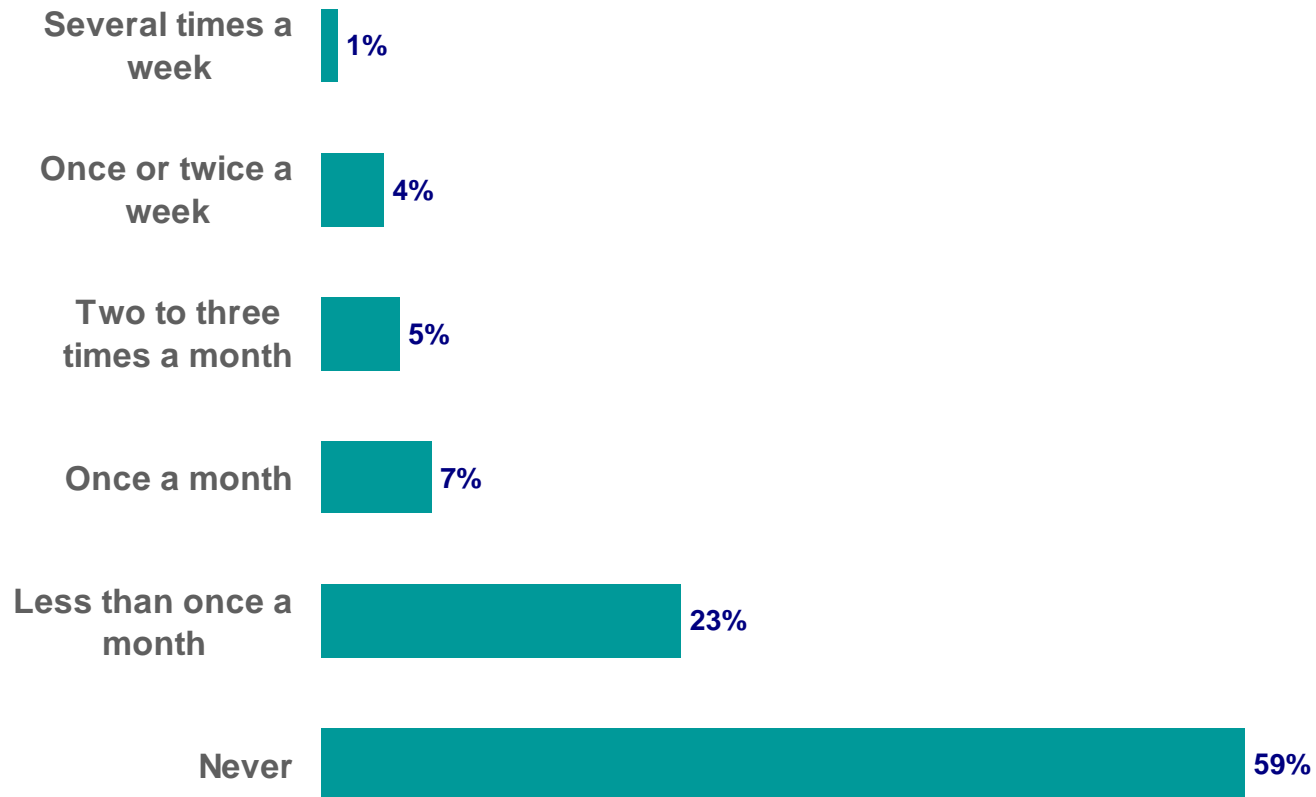




How often do Germans drink 5 or more drinks in a short period of time, e.g. a couple of hours?

Germany

Base : Total surveyed population in DE n=1000

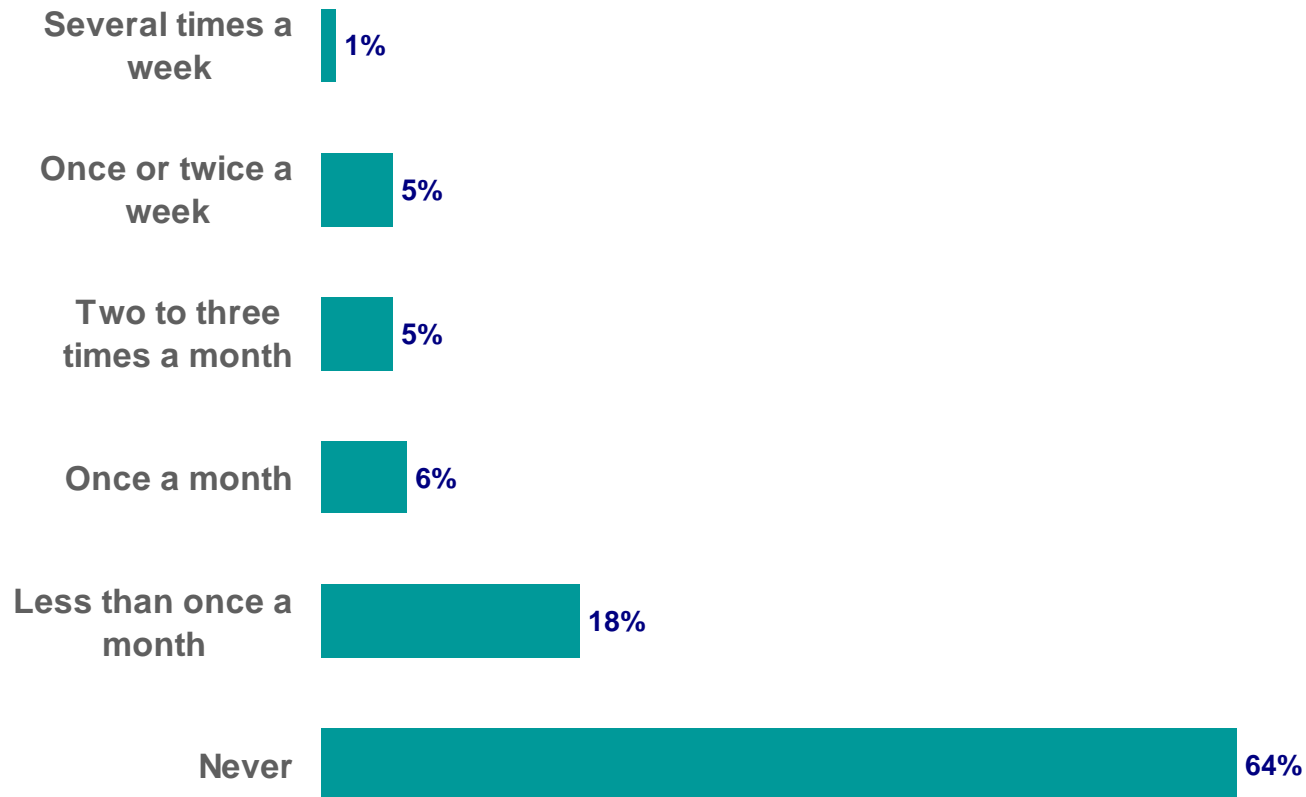




How often do Portuguese drink 5 or more drinks in a short period of time, e.g. a couple of hours?

Portugal

Base : Total surveyed population in PT n=998

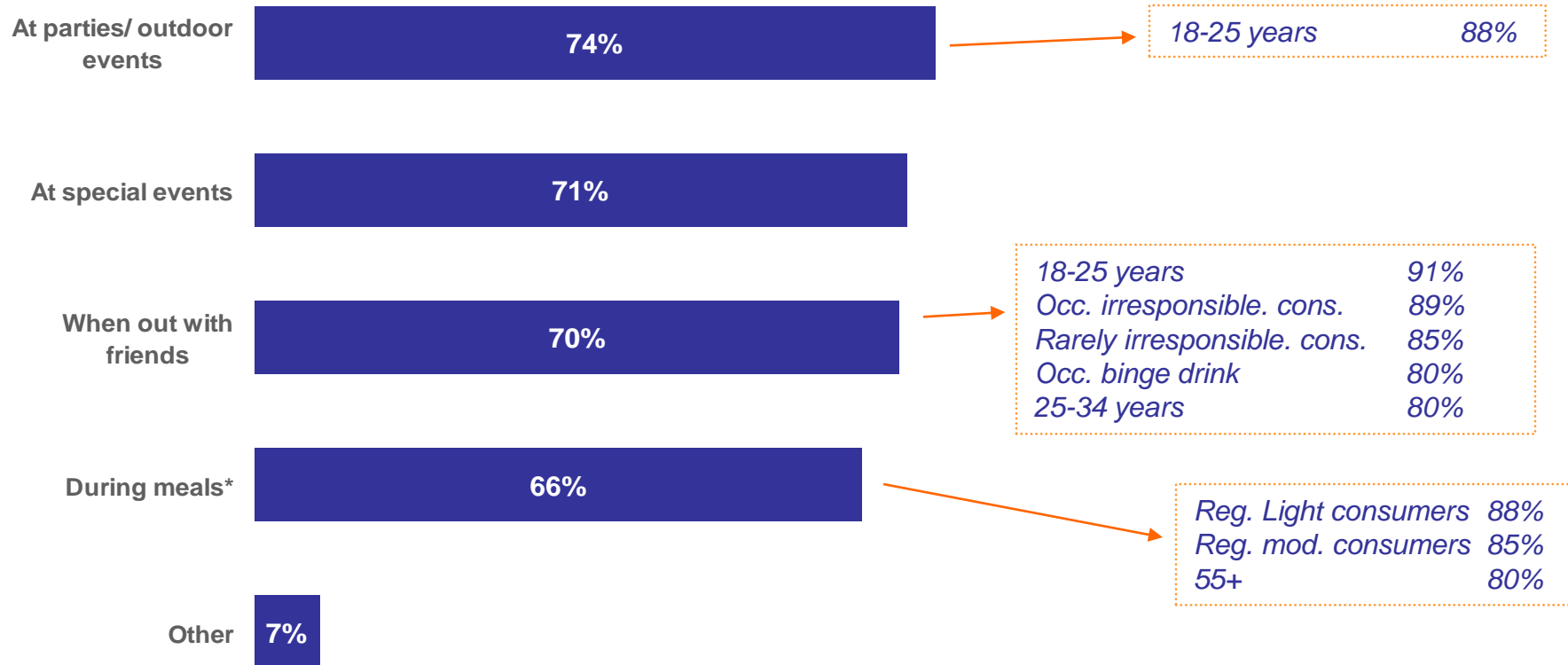




On which occasions do Europeans who drink typically have a drink?

Total drinkers

Base : Total Consumers of Alcoholic Drinks n=3018



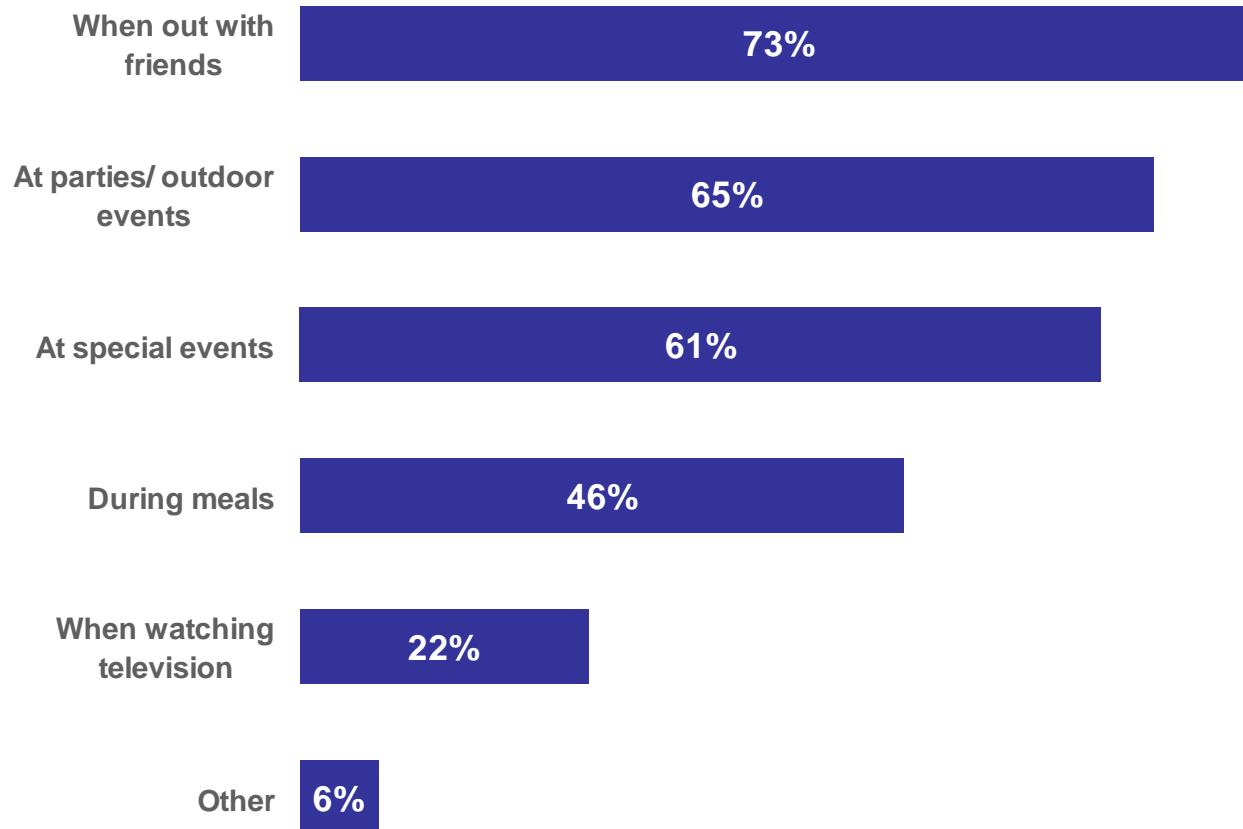
*During meals + over a meal with family, friends or colleagues.



On which occasions do Czechs who drink typically have a drink?

Czech Republic

Base : Consumers of Alcoholic Drinks in CZ n=813

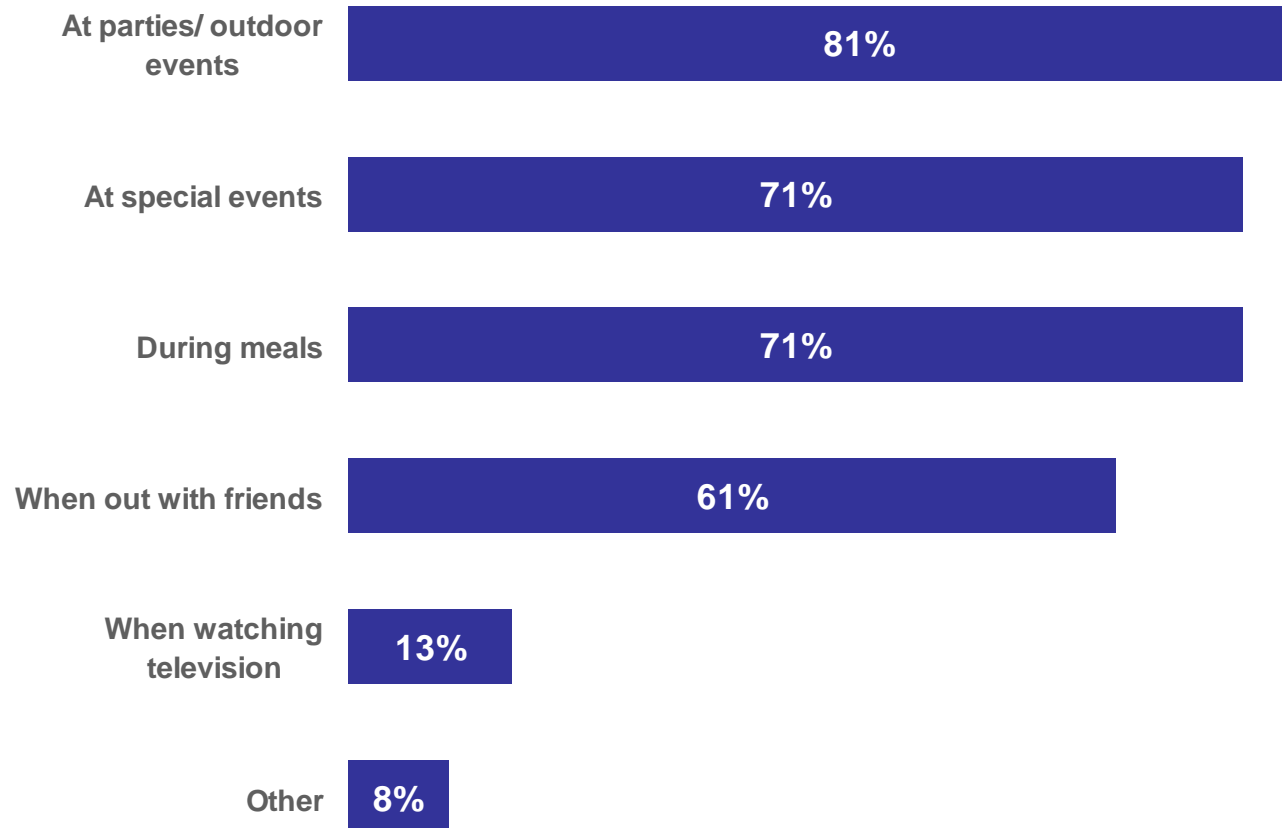




On which occasions do Danes who drink typically have a drink?

Denmark

Base : Consumers of Alcoholic Drinks in DK n=808

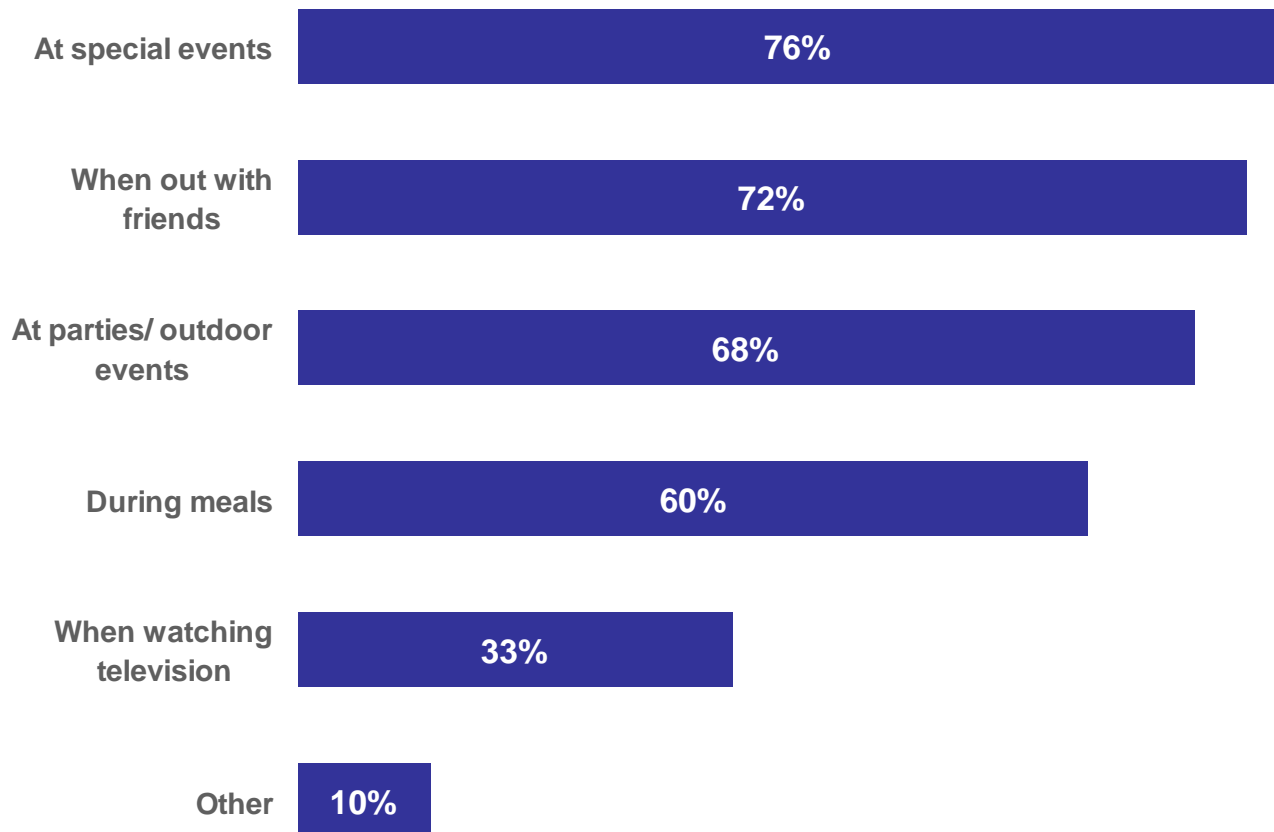




On which occasions do Germans who drink typically have a drink?

Germany

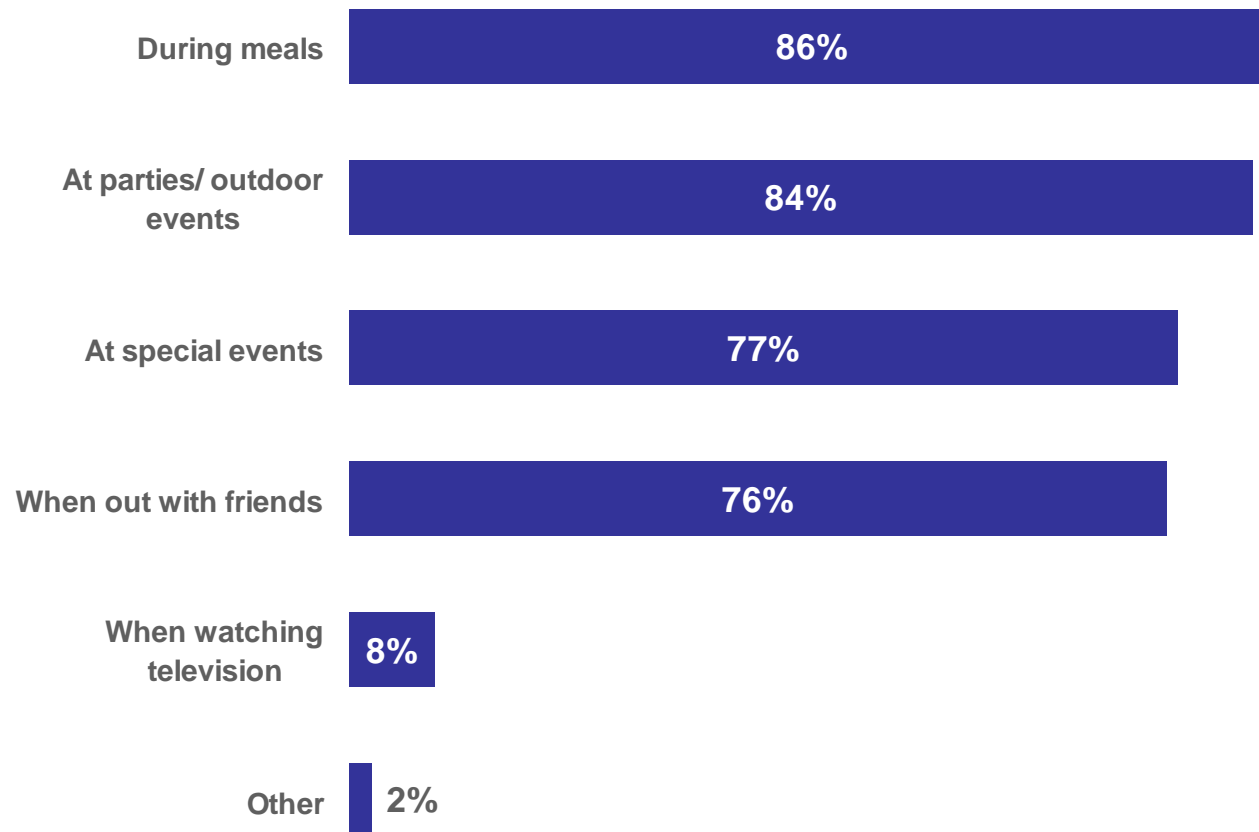
Base : Consumers of Alcoholic Drinks in DE n=677



On which occasions do Portuguese who drink typically have a drink?

Portugal

Base : Consumers of Alcoholic Drinks in PT n=719



How to read the results

In order to allow useful analysis and a clear overview of the main findings, we have built the following indicators based on the questions directly asked in the questionnaire

■ In the last 30 days, how often did people drink alcoholic beverages? (Based on Q2)

- Daily
 - 4-5 times a week
 - 2-3 times a week
 - Once a week
 - 2-3 times a month
 - Once
 - Did not drink in the last 30 years
 - Non-drinkers
- « Regular consumers »
- « Occasional consumers »
- « Infrequent or rarely consumers »

■ On a typical consuming occasion, how much do they drink? (Based on Q3)

- Non-drinkers
 - Less than one drink
 - 1 drinks/glass
 - 2 drinks/glasses
 - 3 drinks/glasses
 - 4 drinks/glasses
 - 5 drinks/glasses
 - 6 drinks/glasses or more
- « Light drinking »
- « Moderate drinking »
- « Irresponsible drinking »

Frequency of alcohol consumption general

	Total surveyed population (n=3995)	CZ (n=997)	DK (n=1000)	DE (n=1000)	PT (n=998)
Do not drink	24%	18%	20%	32%	28%
No drink in last 30 days	2%	1%	3%	2%	1%
Infrequent consumers	18%	18%	26%	19%	9%
Occasional consumers	32%	42%	33%	28%	27%
Regular consumers	23%*	21%	19%	18%	35%

*Of the 23% of regular consumers: 71% are males, 36% are aged 55+ and 26% have a monthly income of 1,000€-1,500€.

European drinking behaviours

Based on how often people drink and how many glasses they typically drink, we can observe the following drinking behaviour:

	Total surveyed population (n=3995)	Regular consumers	Occasional consumers	Infrequent consumers
Do not drink	24%			
No drink in last 30 days	2%			
Light drinking	9%	3%	3%	3%
Moderate drinking	50%	14%	22%	12%
Irresponsible drinking	16%	6%	7%	3%

Based on how often people drink and how many glasses they typically drink, we can observe the following drinking behaviour

	Total surveyed population in CZ (n=997)	Regular consumers	Occasional consumers	Infrequent consumers
Do not drink	18%			
No drink in last 30 days	1%			
Light drinking	6%	1%	2%	3%
Moderate drinking	53%	11%	27%	13%
Irresponsible drinking	22%	9%	11%	2%

Based on how often people drink and how many glasses they typically drink, we can observe the following drinking behaviour

	Total surveyed population in DK (n=1000)	Regular consumers	Occasional consumers	Infrequent consumers
Do not drink	19%			
No drink in last 30 days	3%			
Light drinking	1%	2%	1%	2%
Moderate drinking	55%	12%	24%	17%
Irresponsible drinking	23%	5%	8%	6%

The National Board of Health in Denmark recommends women have a max. alcohol intake of 14 units/week, and men max. 21 units/week. National studies have shown 85 % of the population has a drinking behaviour in compliance with these recommendations (<http://www.si-folkesundhed.dk/Forskning/Befolkningens%20sundhedstilstand/Sundhed%20og%20sygelighed%20SUSY.aspx?lang=en>)

German drinking behaviours

Based on how often people drink and how many glasses they typically drink, we can observe the following drinking behaviour

	Total surveyed population in GE (n=1000)	Regular consumers	Occasional consumers	Infrequent consumers
Do not drink	32%			
No drink in last 30 days	2%			
Light drinking	8%	1%	3%	3%
Moderate drinking	46%	12%	20%	13%
Irresponsible drinking	13%	5%	5%	3%

Portuguese drinking behaviours

Based on how often people drink and how many glasses they typically drink, we can observe the following drinking behaviour

	Total surveyed population in PT (n=998)	Regular consumers	Occasional consumers	Infrequent consumers
Do not drink	28%			
No drink in last 30 days	-			
Light drinking	16%	7%	6%	3%
Moderate drinking	45%	21%	19%	6%
Irresponsible drinking	10%	7%	2%	0.4%

■ How often do people drink 5 or more drinks in a short period of time (= binge drinking)?

- Several times a week
 - Once or twice a week
 - Two or three times a month
 - Once a month
 - Less than once a month
 - Never
 - Non-drinkers
- « Regularly binge drink »
- « Occasionally binge drink »
- « Extremely rarely or never binge drink »

Binge drinking frequency

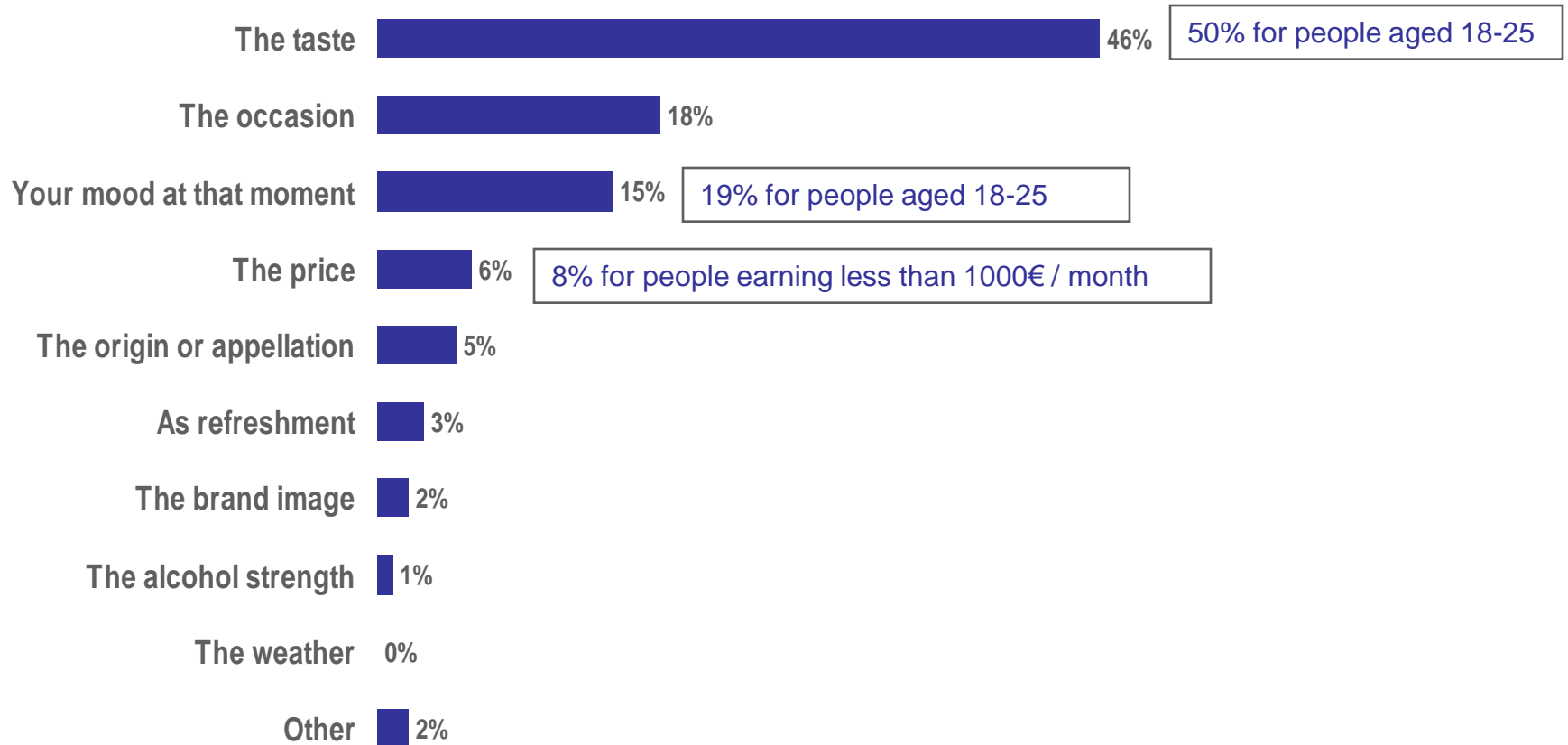
	Total surveyed population (n=3995)	Czech Republic (n=997)	Denmark (n=1000)	Germany (n=1000)	Portugal (n=998)
Extremely rarely or never binge drink (non-drinkers included)	77%	70%	73%	82%	80%
Occasionally binge drink	17%	23%	21%	13%	13%
Regularly binge drink	7%	7%	6%	5%	7%

2. Consequences of price policy on the purchasing and consumption behaviour of people who drink *(Sample size: 3018 out of 3995)*



What is the first criterion for Europeans who drink when buying alcohol?

Base : Total Consumers of Alcoholic Drinks n=3018

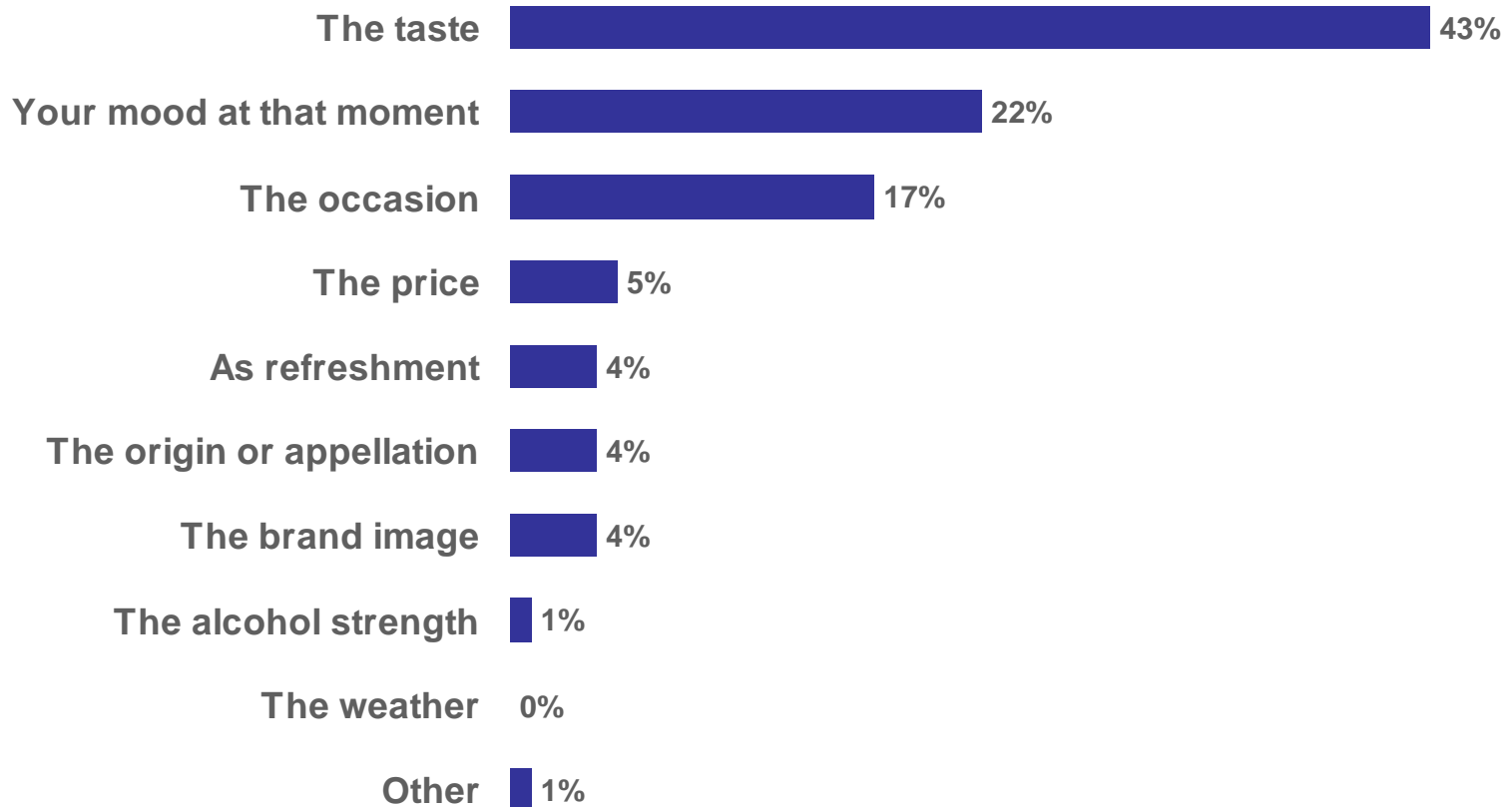




What is the first criterion for Czechs who drink when buying alcohol?

Czech Republic

Base : Total Consumers of Alcoholic Drinks in CZ n=813

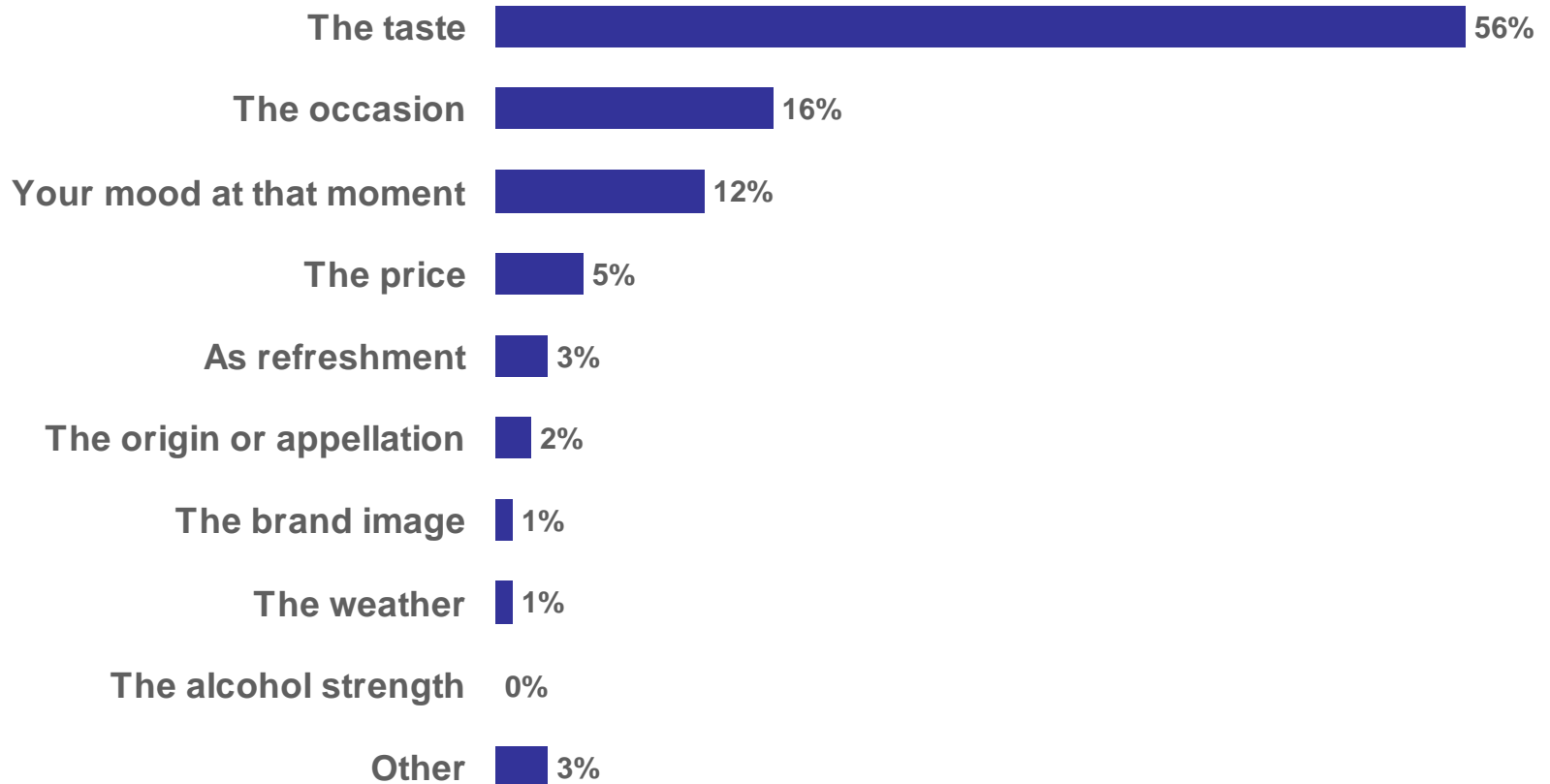




What is the first criterion for Danes who drink when buying alcohol?

Denmark

Base : Total Consumers of Alcoholic Drinks in DK n=808

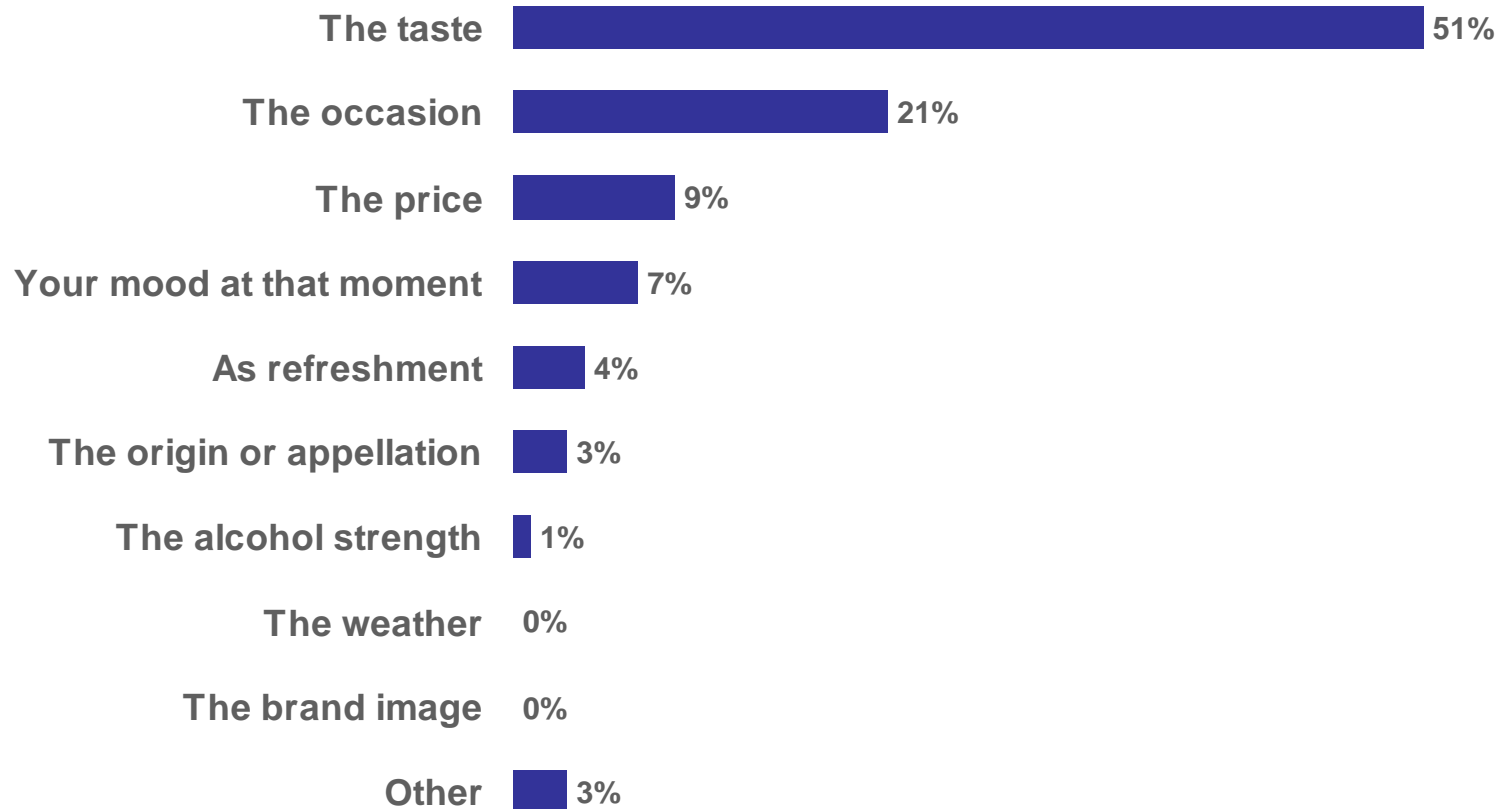




What is the first criterion for Germans who drink when buying alcohol?

Germany

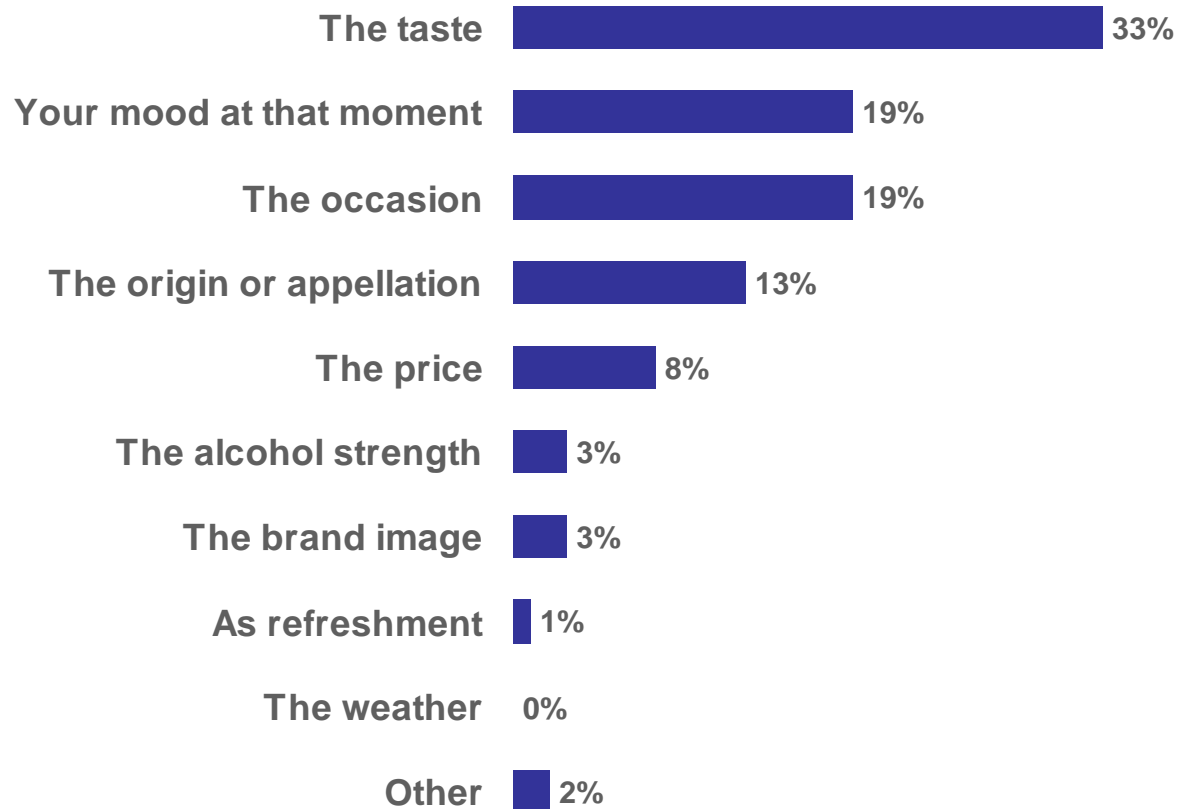
Base : Total Consumers of Alcoholic Drinks in DE n=677



What is the first criterion for Portuguese who drink when buying alcohol?

Portugal

Base : Total Consumers of Alcoholic Drinks in PT n=677

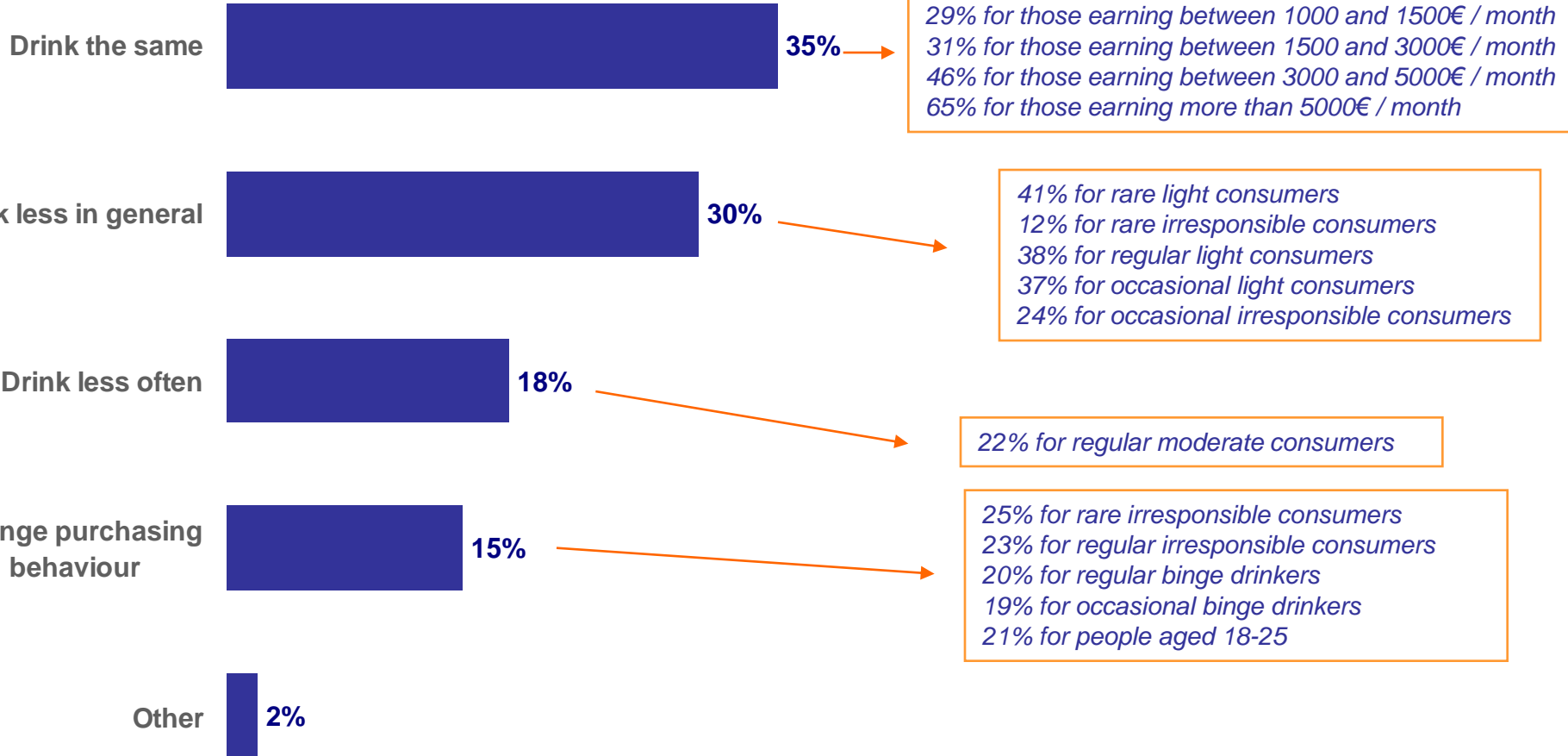




If the price of all drinks were to increase by 25%, what would Europeans who drink most likely do?

Total Drinkers

Base : Total Consumers of Alcoholic Drinks n=3018

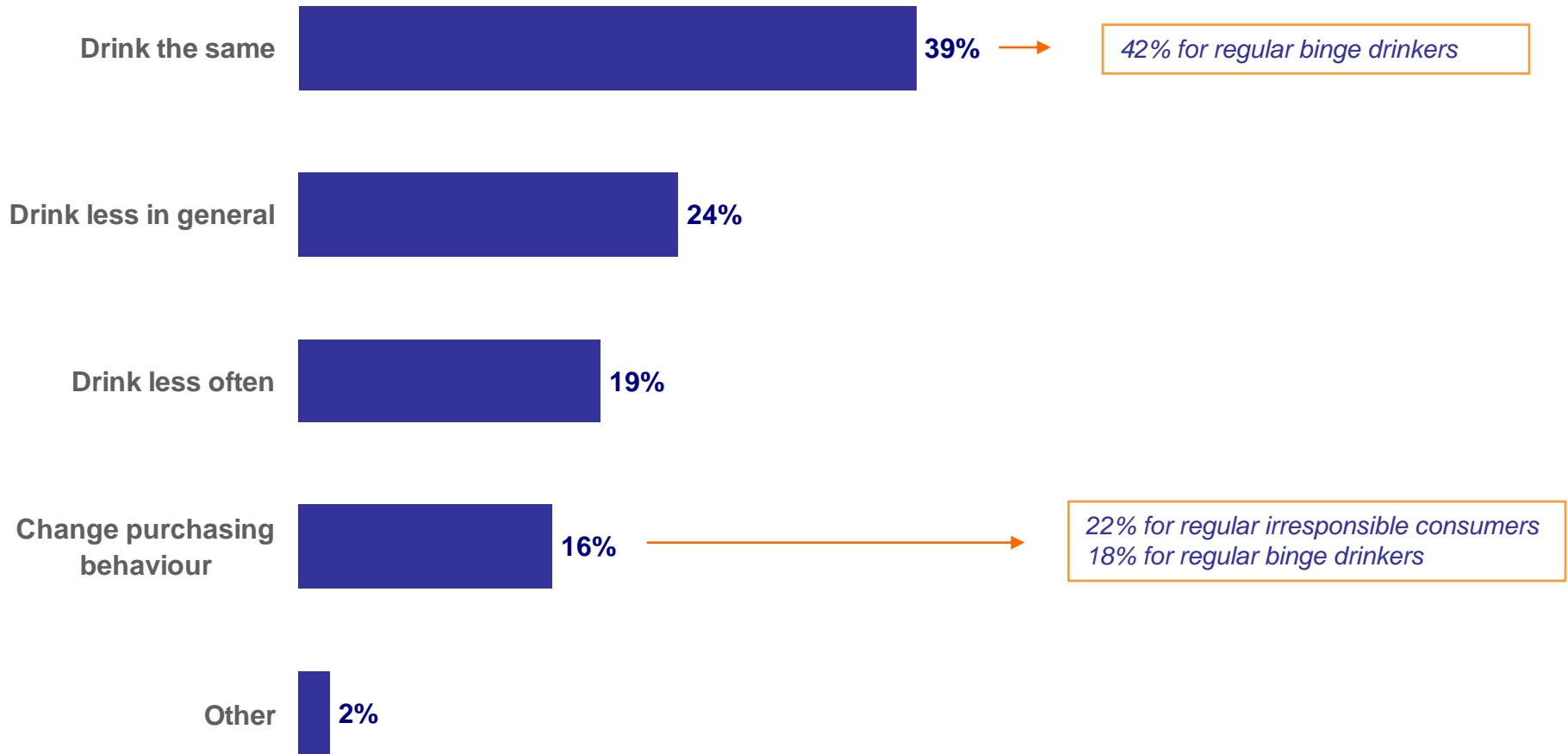




If the price of all drinks were to increase by 25%, what would Czechs who drink most likely do?

Czech Republic

Base : Total Consumers of Alcoholic Drinks in CZ n=813

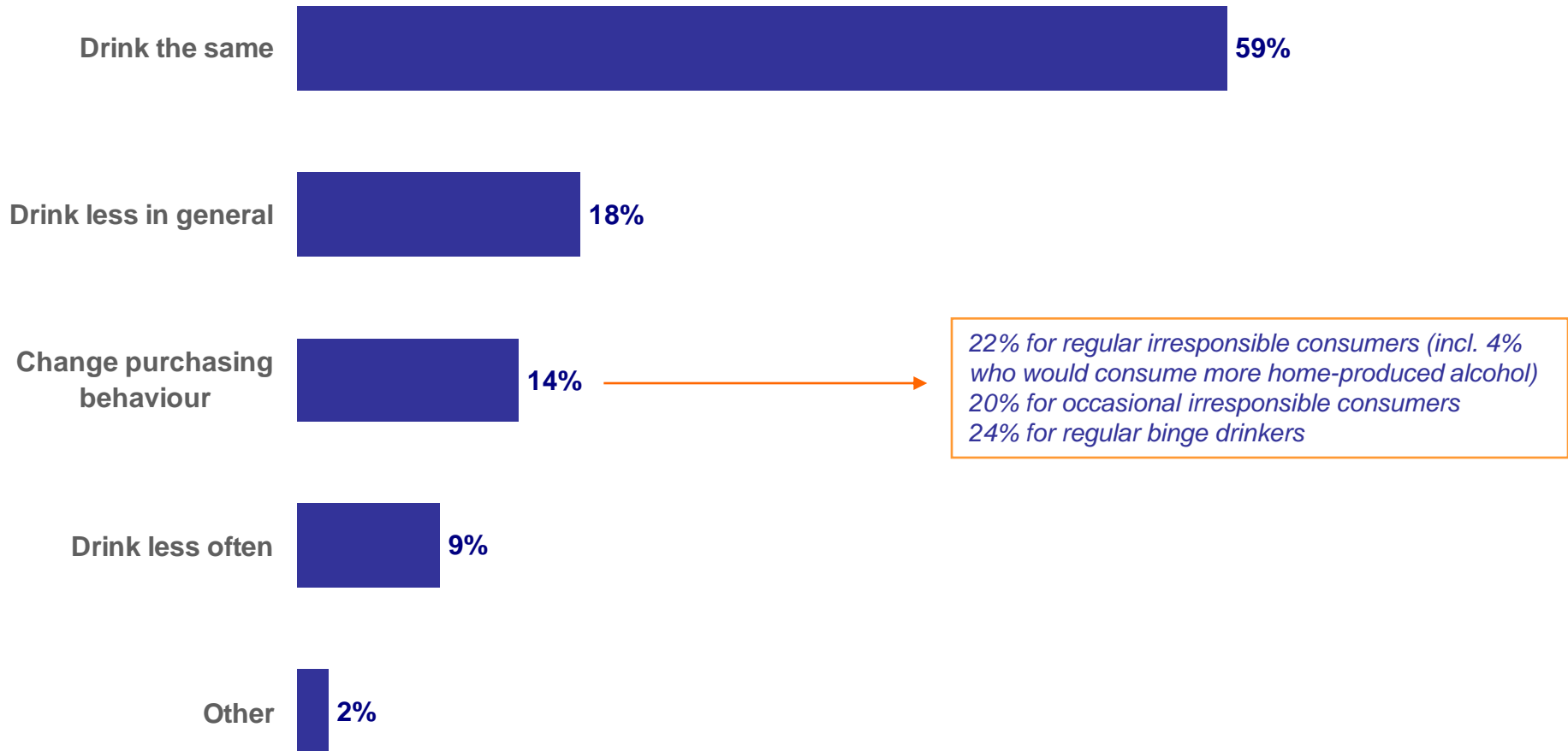




If the price of all drinks were to increase by 25%, what would Danes who drink most likely do?

Denmark

Base : Total Consumers of Alcoholic Drinks in DK n=808

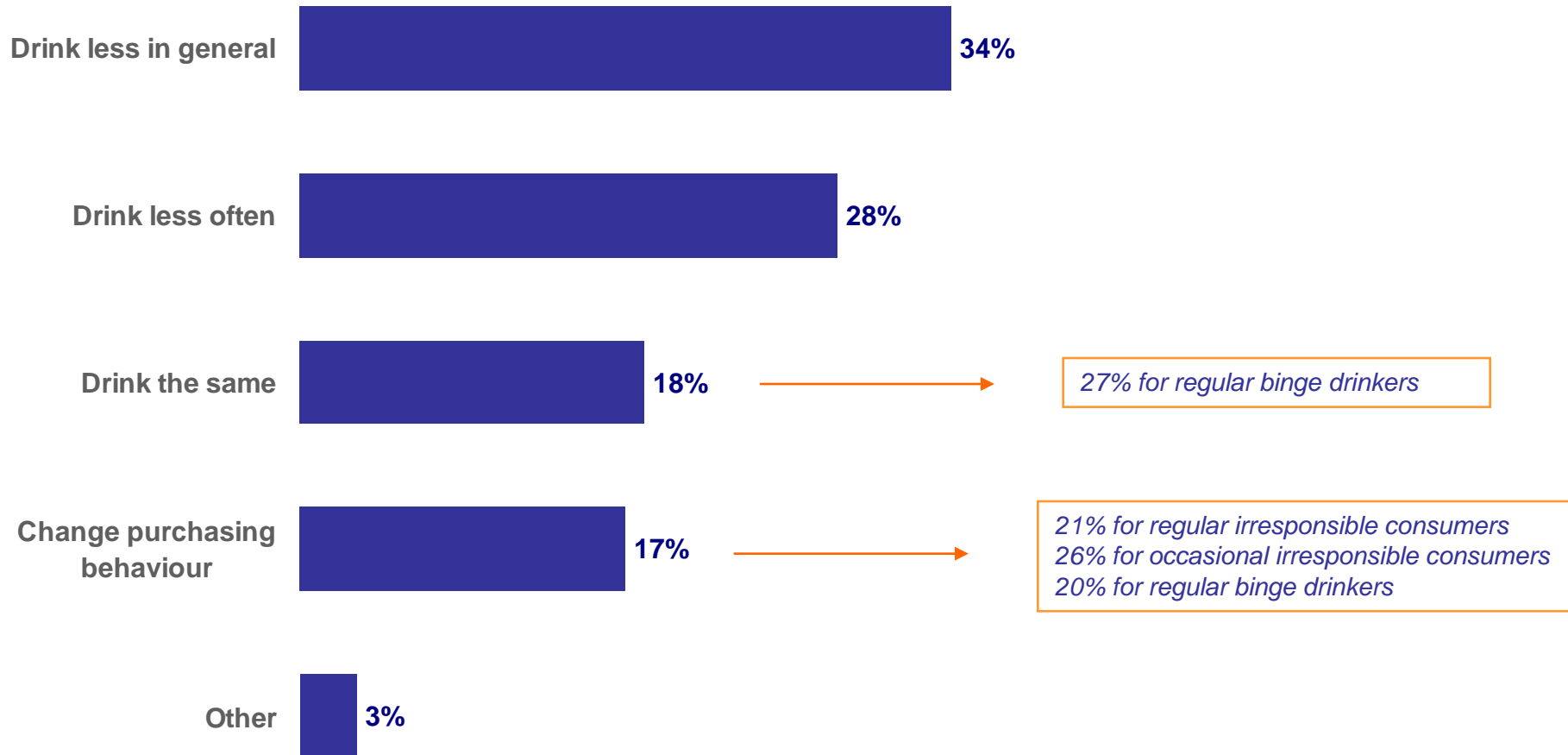




If the price of all drinks were to increase by 25%, what would Germans who drink most likely do?

Germany

Base : Total Consumers of Alcoholic Drinks in DE n=677

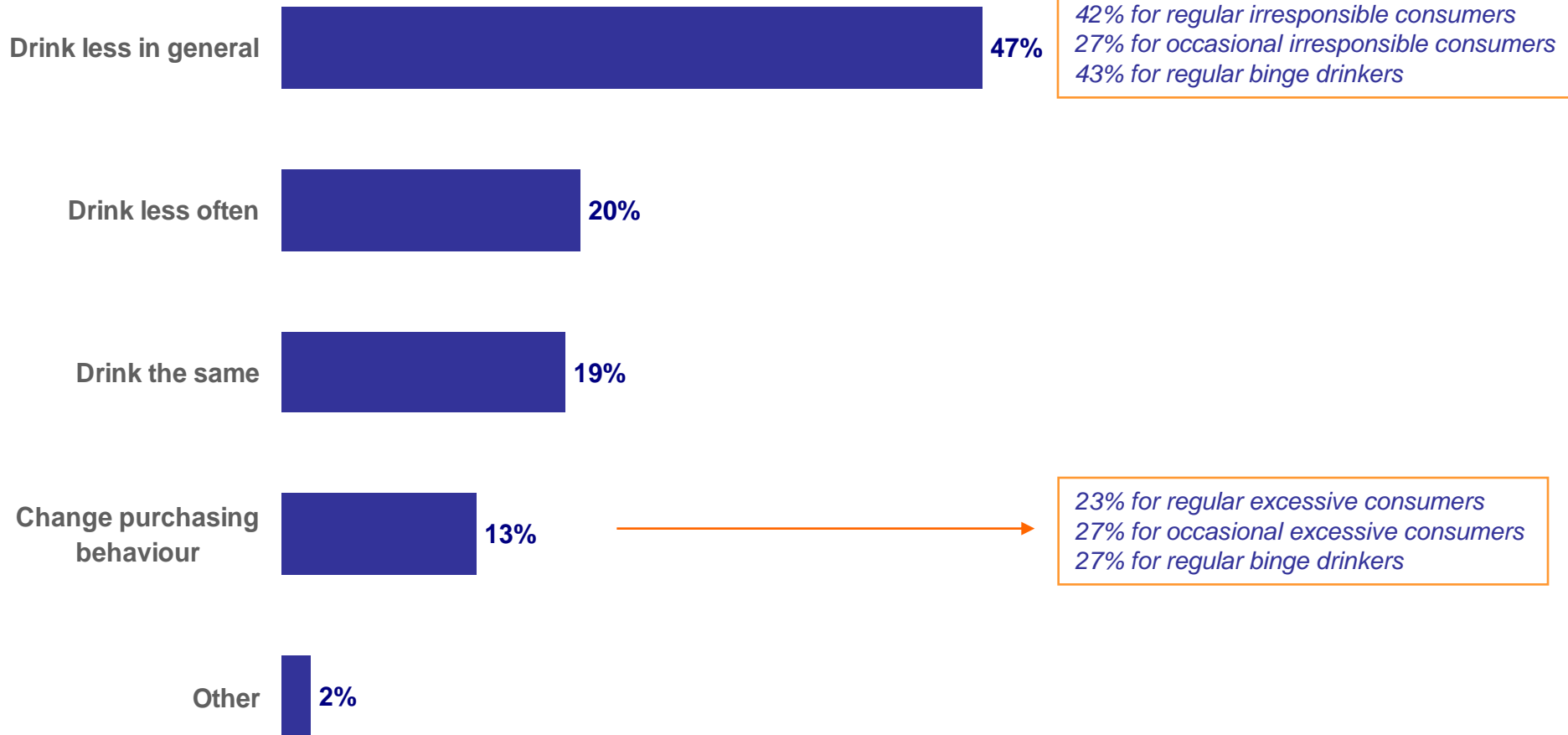




If the price of all drinks were to increase by 25%, what would Portuguese who drink most likely do?

Portugal

Base : Total Consumers of Alcoholic Drinks in PT n=719

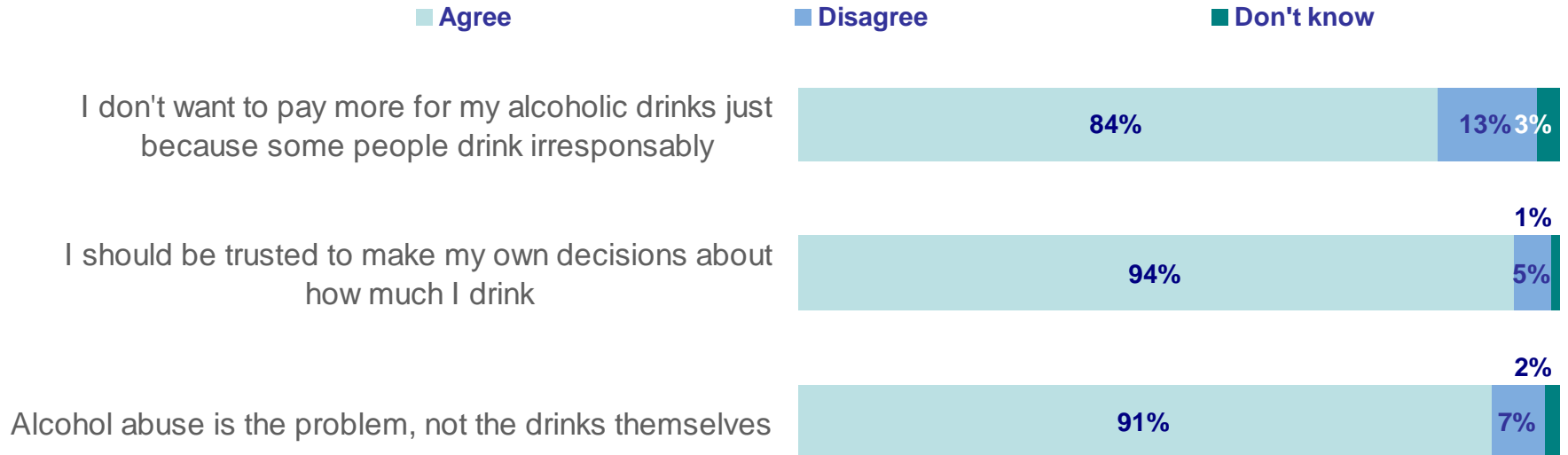


3. Measures to reduce alcohol abuse



General attitude amongst Europeans who drink towards price policy

Base : Total Consumers of Alcoholic Drinks n= 3018





General attitude amongst Czechs who drink towards price policy

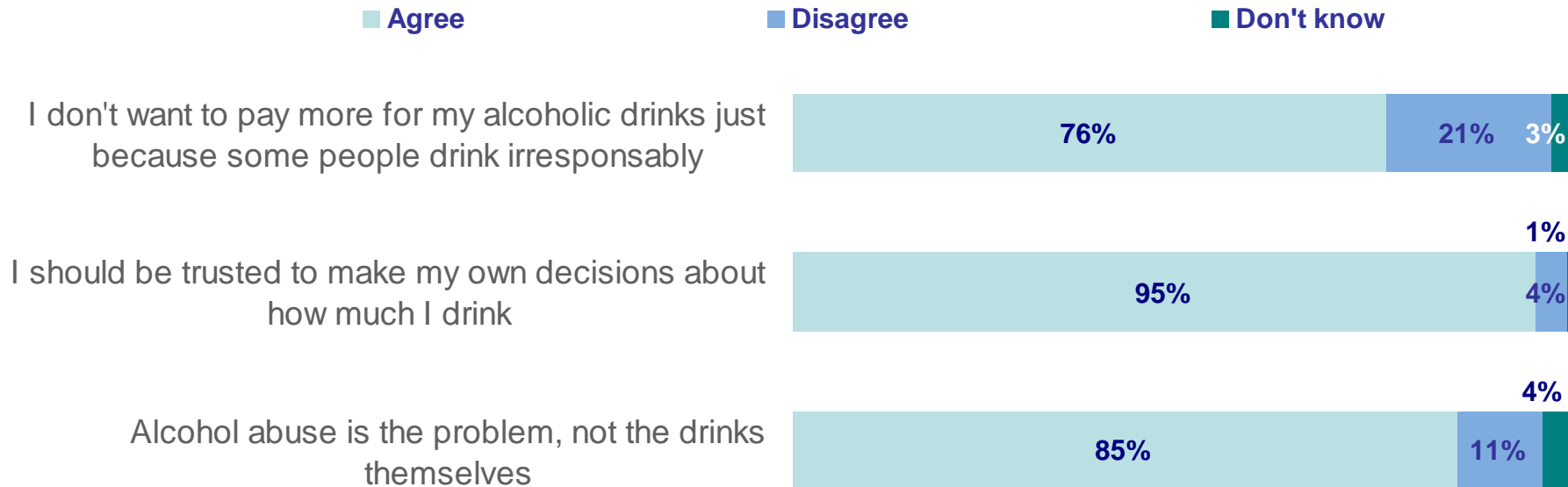
Base : Total Consumers of Alcoholic Drinks in CZ n= 813





General attitude amongst Danes who drink towards price policy

Base : Total Consumers of Alcoholic Drinks in DK n= 808





General attitude amongst Germans who drink towards price policy

Base : Total Consumers of Alcoholic Drinks in DE n= 677





General attitude amongst Portuguese who drink towards price policy

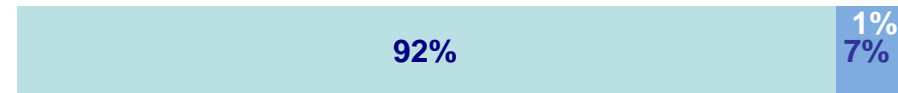
Base : Total Consumers of Alcoholic Drinks in PT n= 719

■ Agree

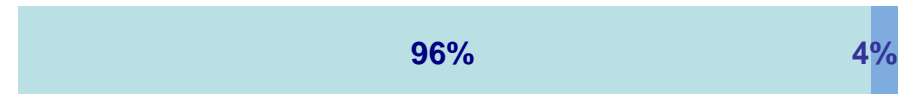
■ Disagree

■ Don't know

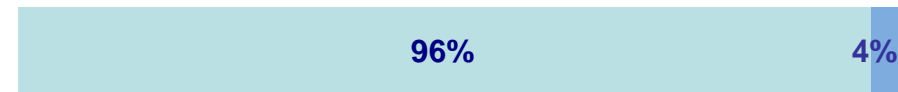
I don't want to pay more for my alcoholic drinks just because some people drink irresponsably



I should be trusted to make my own decisions about how much I drink

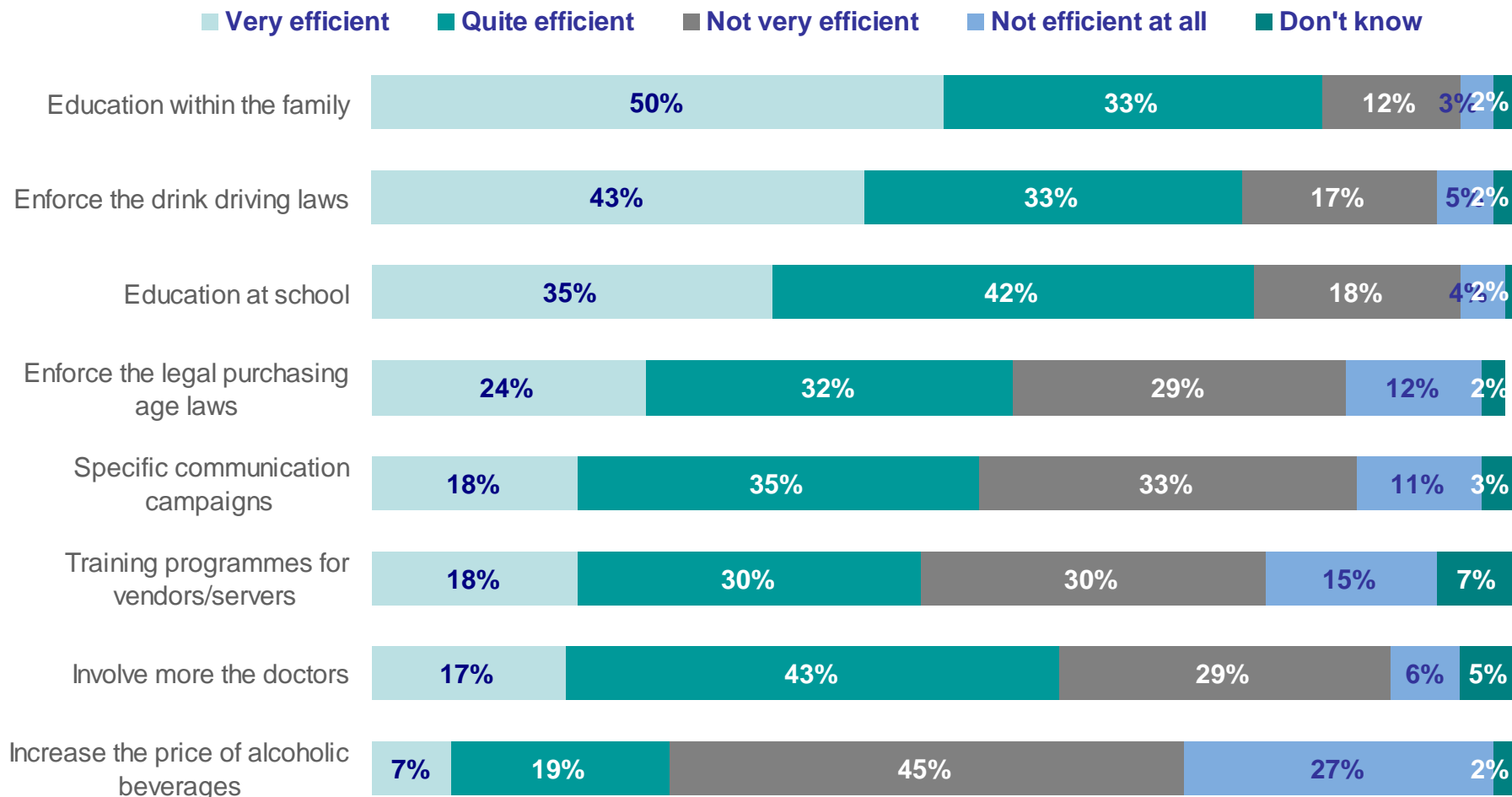


Alcohol abuse is the problem, not the drinks themselves



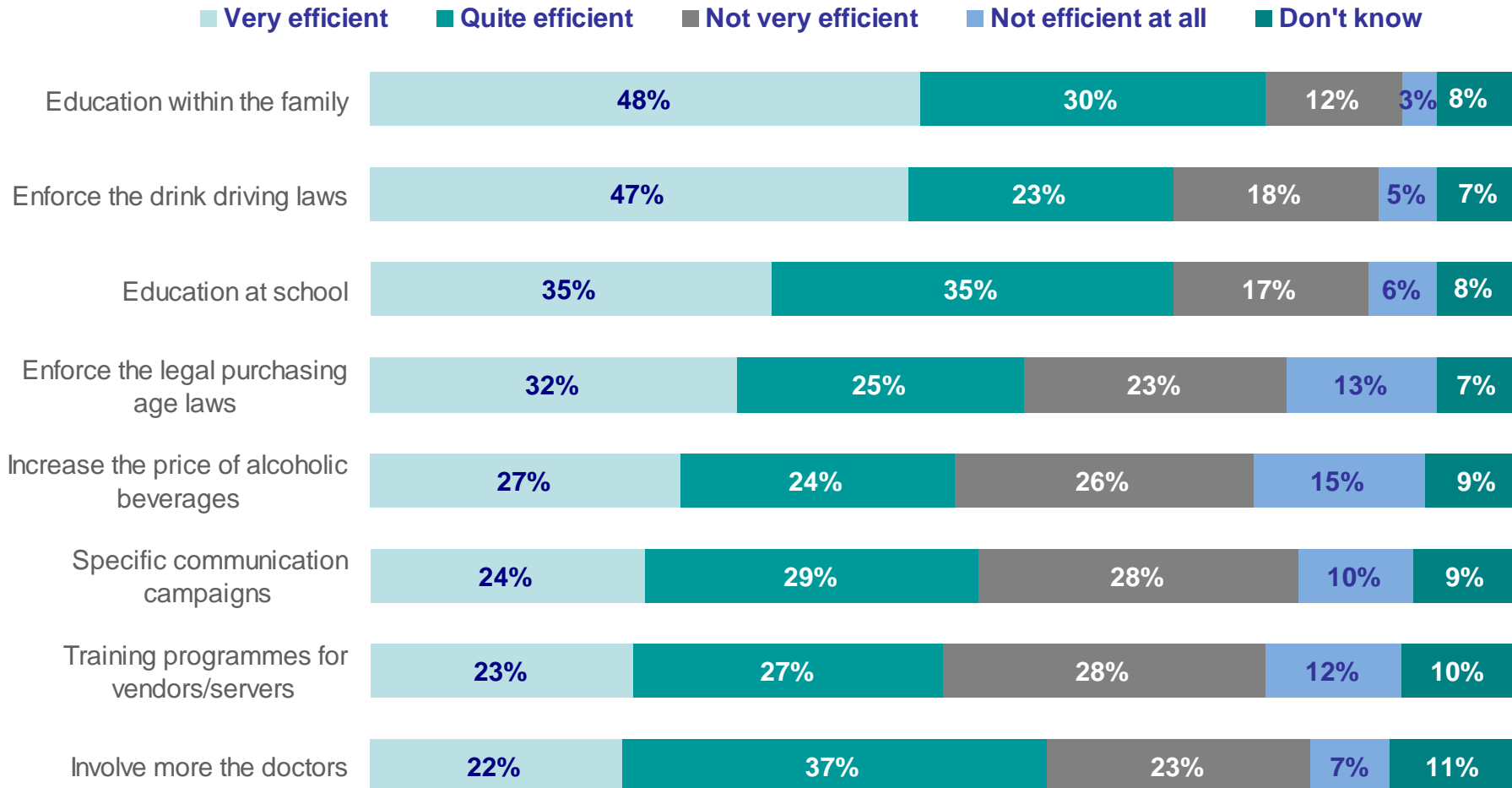
Efficient measures to reduce alcohol abuse according to Europeans who drink in the total surveyed population

Base : Total Consumers of Alcoholic Drinks n=3018



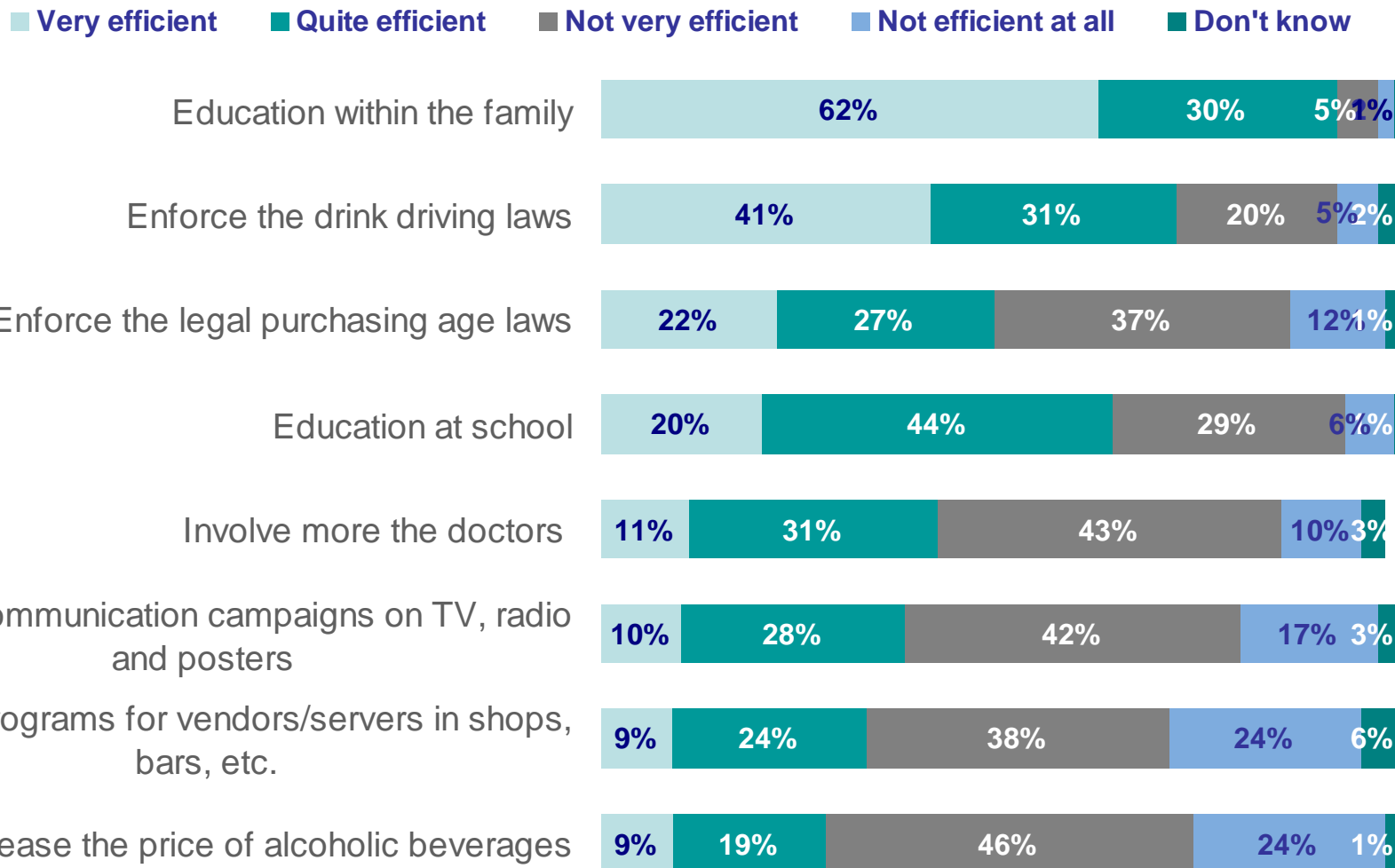
Efficient measures to reduce alcohol abuse according to non-drinkers in the total surveyed population

Base : Total non-drinkers n=977



Efficient measures to reduce alcohol abuse according to people who drink in the Czech Republic

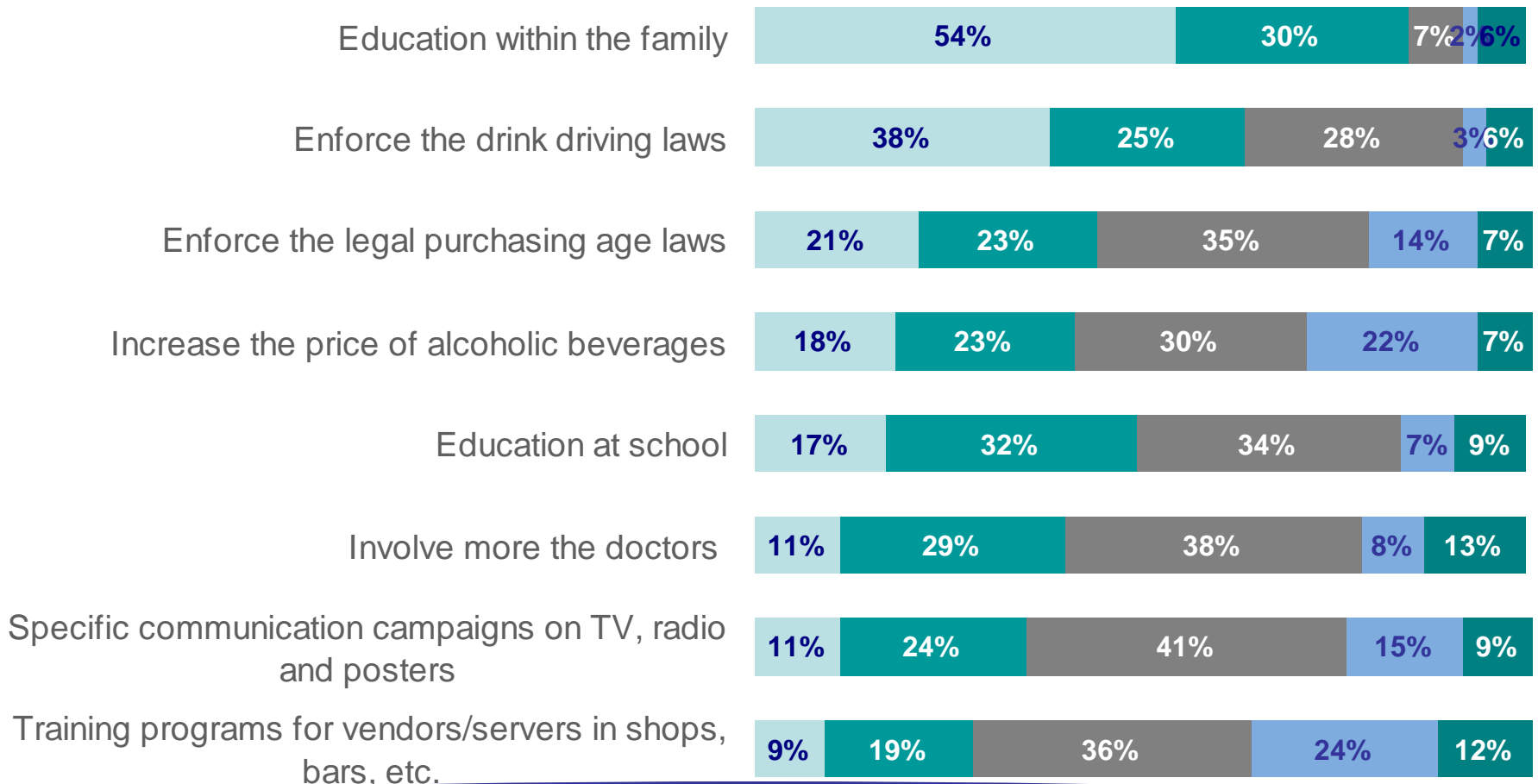
Base : Total Consumers of Alcoholic Drinks in CZ n=813



Efficient measures to reduce alcohol abuse according to non-drinkers in the Czech Republic

Base : Total non-drinkers in CZ n=184

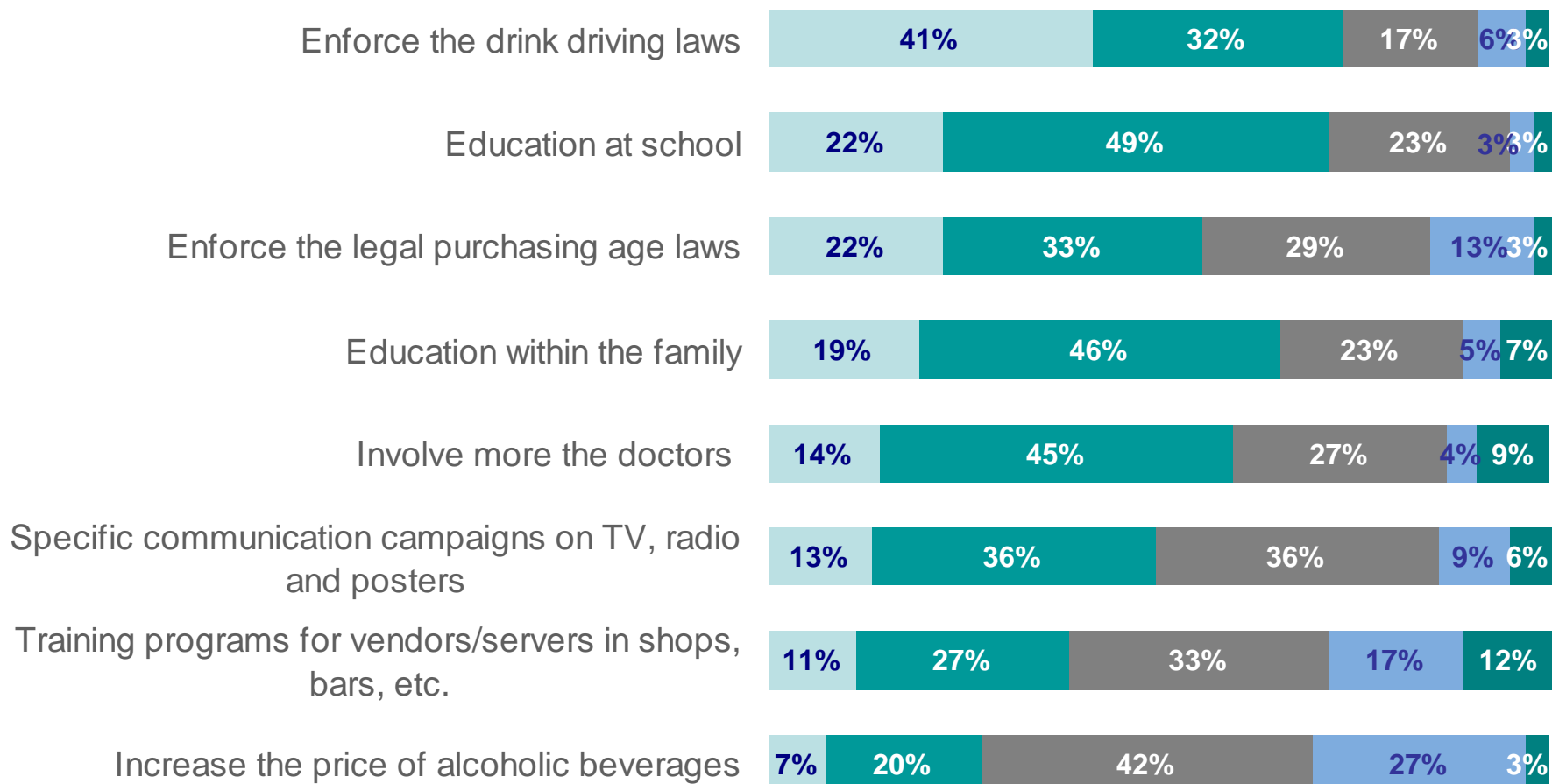
■ Very efficient
 ■ Quite efficient
 ■ Not very efficient
 ■ Not efficient at all
 ■ Don't know



Efficient measures to reduce alcohol abuse according to people who drink in Denmark

Base : Total Consumers of Alcoholic Drinks in DK n=808

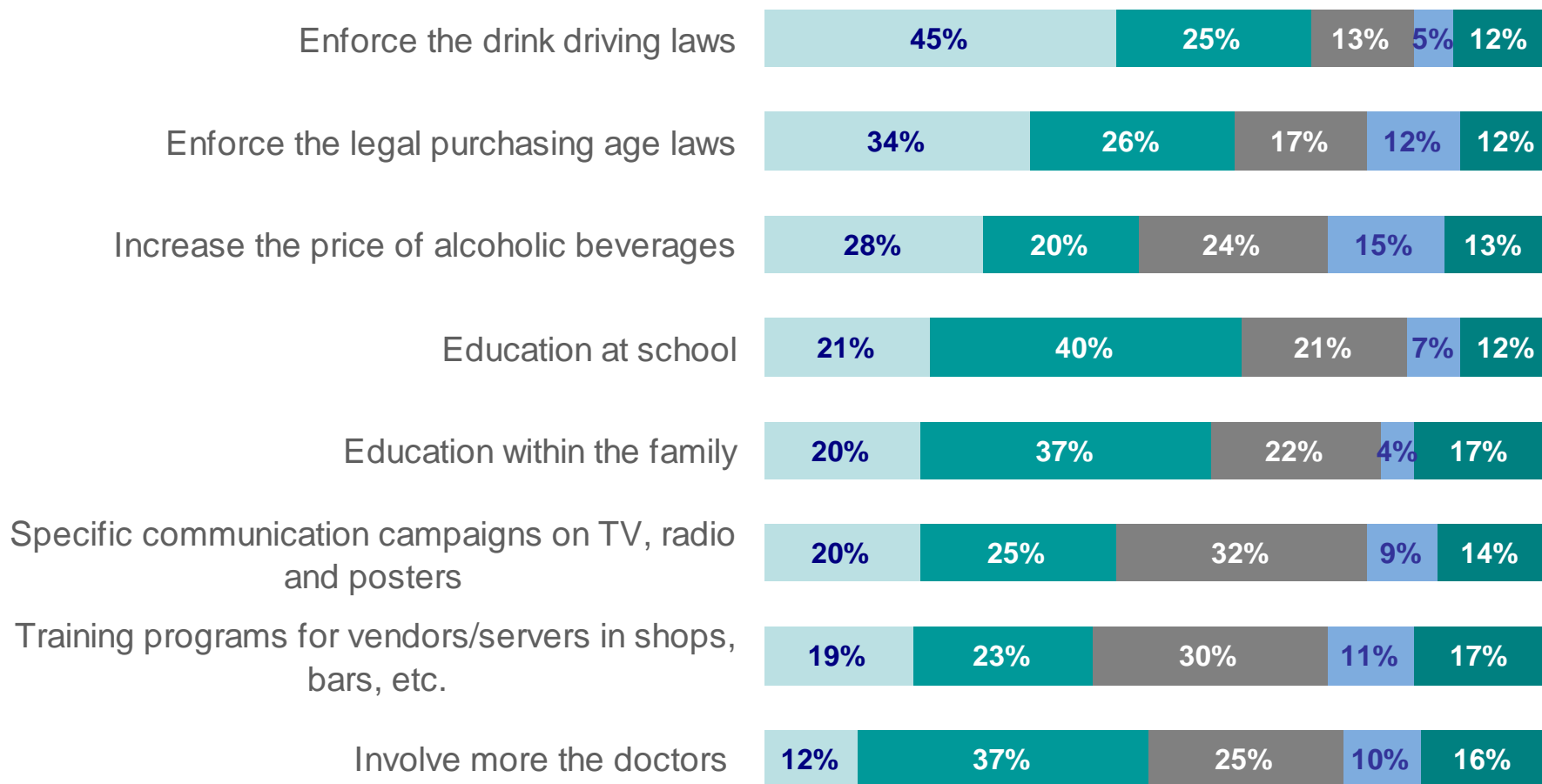
■ Very efficient
 ■ Quite efficient
 ■ Not very efficient
 ■ Not efficient at all
 ■ Don't know



Efficient measures to reduce alcohol abuse according to non-drinkers in Denmark

Base : Total non-drinkers in DK n=192

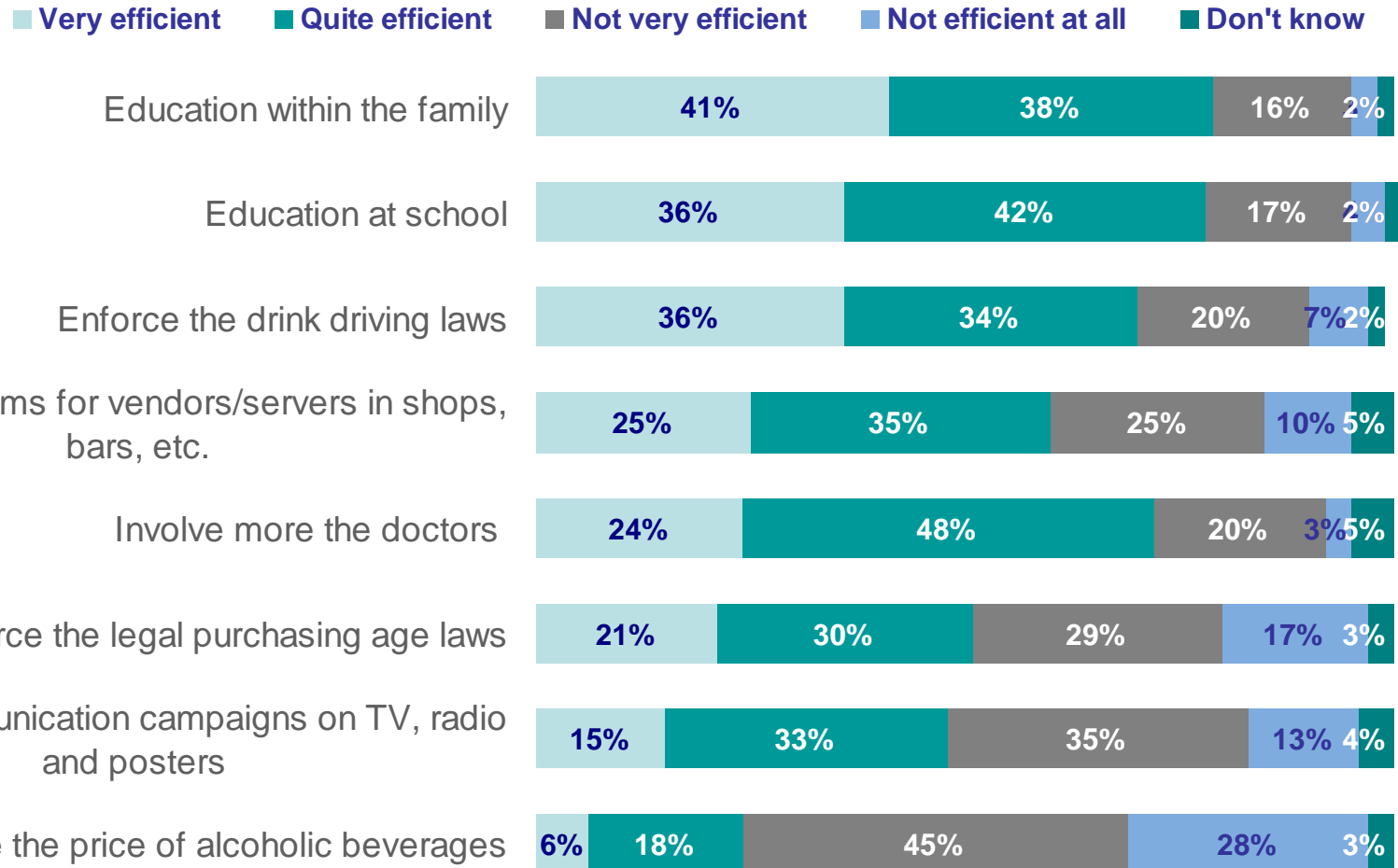
■ Very efficient
 ■ Quite efficient
 ■ Not very efficient
 ■ Not efficient at all
 ■ Don't know





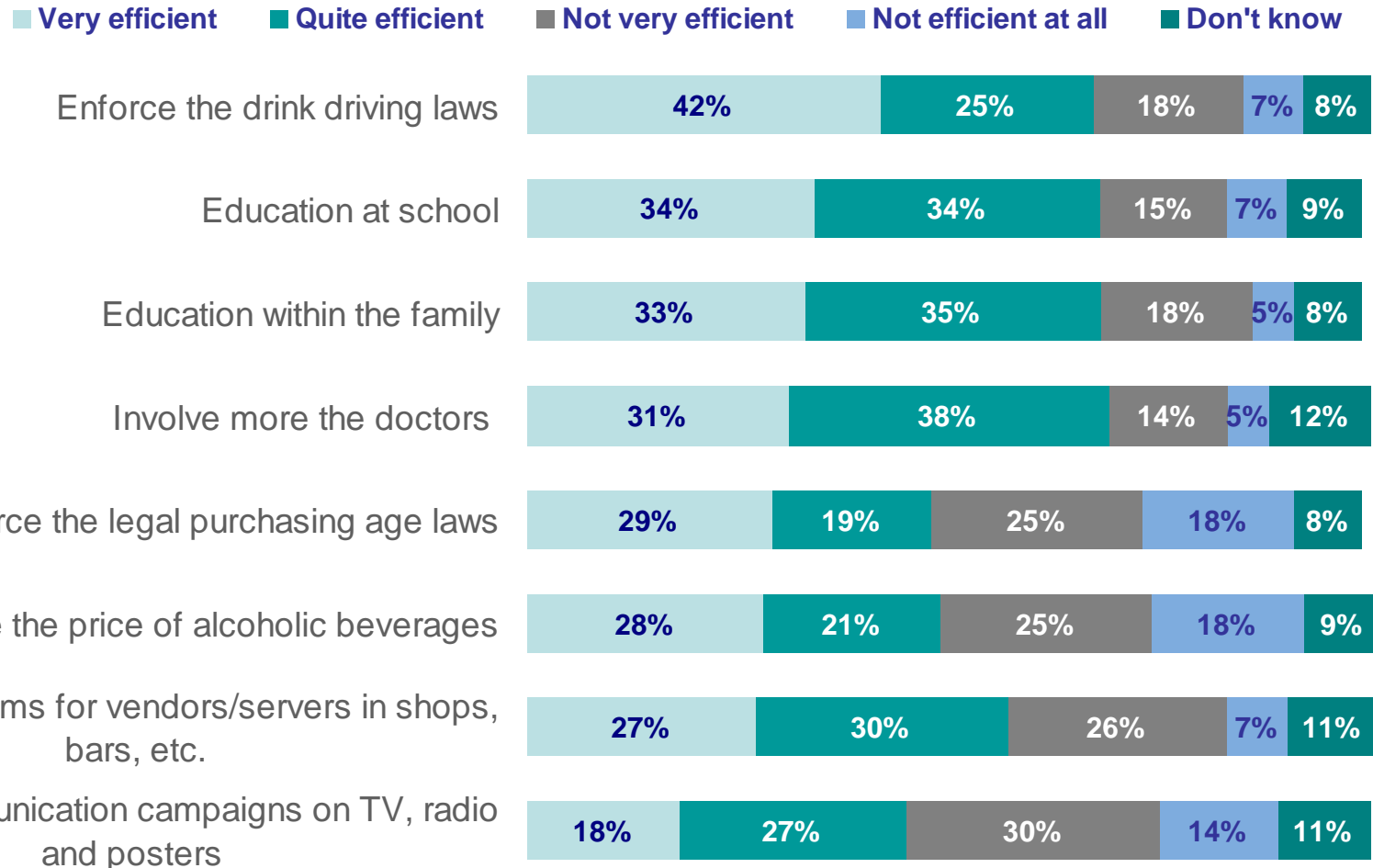
Efficient measures to reduce alcohol abuse according to people who drink in Germany

Base : Total Consumers of Alcoholic Drinks in DE n=677



Efficient measures to reduce alcohol abuse according to non-drinkers in Germany

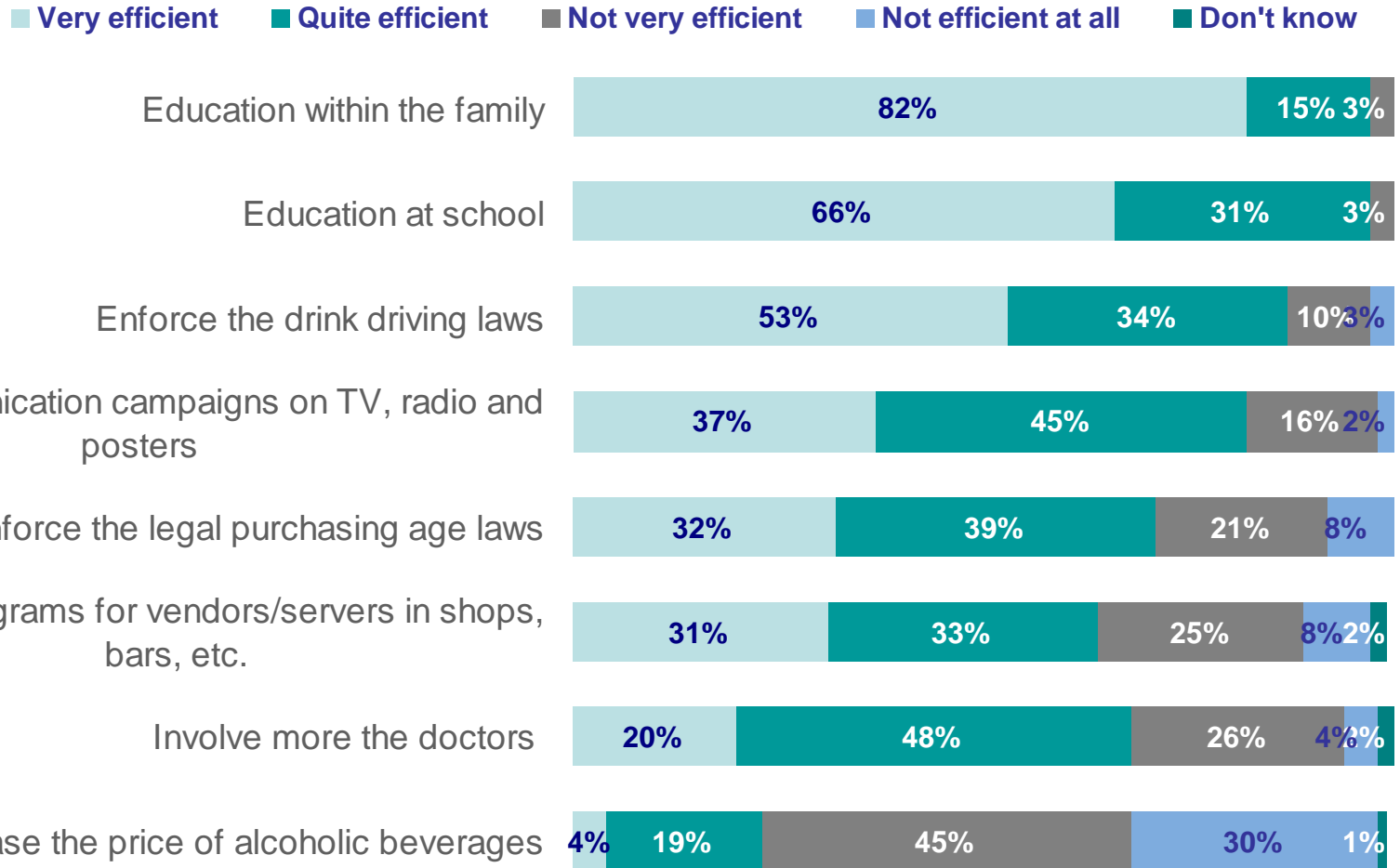
Base : Total non-drinkers in DE n=323





Efficient measures to reduce alcohol abuse according to people who drink in Portugal

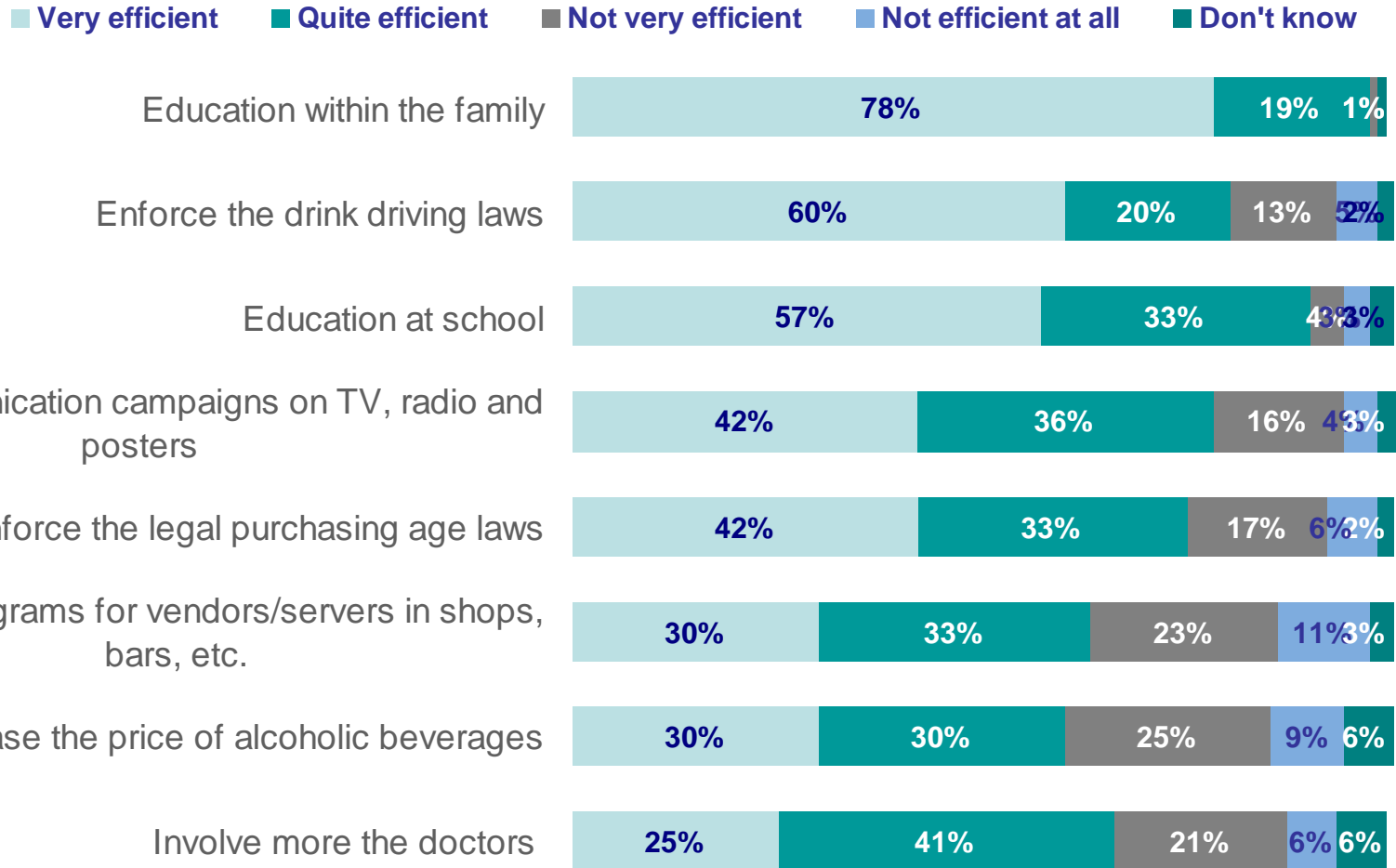
Base : Total Consumers of Alcoholic Drinks in PT n=719





Efficient measures to reduce alcohol abuse according to non-drinkers in Portugal

Base : Total non-drinkers in PT n=279

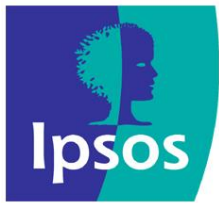


Conclusions



Taste, occasion and mood are the first criteria of choice

- For 8 consumers in 10, taste of the drinks, occasion of consumption and their mood at that moment determine the choice of alcoholic drinks.
- For only 6% of consumers, price is the first criterion of choice. There are no significant differences by age group.
- Consumers in all 4 countries have similar profiles in terms of criteria of choice.
- The most typical occasions when alcoholic drinks are consumed for more than 7 consumers in 10 are **social events outside the home**: parties/outdoor events, special occasions, when out with friends.



For a majority of people, a price increase would not affect their overall level of alcohol consumption

- Only 30% of consumers would drink less in general if the price of all alcoholic drinks were to increase by 25%.
- 35% would just drink the same whilst 15% would just change their purchasing behaviour
- 18% would drink less often but not necessarily drink less in general.
- The price increase would, unsurprisingly, hit the poorest sections of the population most, whilst the richest people are most likely to just continue consuming the same.
- Meanwhile, the youngest group (aged 18-25) would be the most likely to just change their purchasing behaviour (e.g. Turn to the cheaper options).



A price increase would miss the target

- A price increase has the biggest impact on the people who alcohol policies should not be targeting and has the smallest impact on the target problem.
- A price increase would hit the light and moderate consumers' consumption levels most, whilst the regular irresponsible and regular binge drinkers are much more likely than the average consumer to just change their purchasing behaviour.
- A price increase can affect all categories of consumers, yet:
 - Only 1.8% of Europeans fall into the category of being regular irresponsible consumers who would drink less in general as a result.
 - Only 1.65% of Europeans are regular binge drinkers who would drink less in general as a result.



A price increase would have a different impact according to the country

- Only 18% of Danes and 24% of Czechs, but 34% of Germans and 47% of Portuguese would drink less in general if the price of all alcoholic drinks were to increase.
- Whatever the countries though, it is the binge drinkers and the regular irresponsible consumers who are generally most likely to drink the same or simply change their purchasing behaviour to get round the issue.
- In Denmark, for example, 59% of all the consumers interviewed would drink the same, but 81% of regular irresponsible consumers would either just drink the same or simply change their purchasing behaviour.



General negative attitude towards a price increase

- For more than 90% of consumers, price policies do not tackle the real problem: alcohol abuse. Instead, it is perceived as unfair towards those who drink responsibly (84%). In addition, it limits people's freedom of choice (94%).
- Similar attitude patterns are observed in all 4 countries.
- Only 32% of Europeans think that the increase of price of alcoholic beverages could be efficient to reduce alcohol abuse, but twice as many people think it wouldn't be efficient. 24% think pricing policy is even **not efficient at all**.
- Instead, for more than 80% of people, education within the family would be the most efficient measure. Other efficient measures are education at school (75%) and enforcing the drink driving laws (74%).

Appendix: questionnaire

D1. You are:

1. Male
2. Female

D2. How old are you?

1. 18-25 years old
2. 26-34 years old
3. 35-54 years old
4. 55 years old and more

D3. What is your family status?

1. Single
2. In partnership
3. Married

D4. Do you have any children?

1. Yes
2. No

D5. What is the monthly net (post-tax) income of your household?

1. Less than 1.000 €
2. Between 1.000 and 1.500 €
3. Between 1.500 and 3.000 €
4. Between 3.000 and 5.000 €
5. More than 5.000 €
6. Don't know/Don't want to answer

D6. In which region do you live?

Consumption habits

- 1) Which of the following alcoholic drinks do you consume most often? Could you please rank them from 1 to 6, where 1 means that it is the alcoholic drink that you consume the most frequently and where 6 means that you consume it the least frequently?

Ranking from 1 to 6 – one answer per row and per column

	1	2	3	4	5	6
1 Beer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 Cider	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 Champagne Sparkling wine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4 Wine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 Spirits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6 Pre-mixed drinks (e g alcohol with soda)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7 <input type="checkbox"/> I don't drink alcoholic drinks → Q. 10						

- 2) In the last 30 days, how often did you drink the following alcoholic drinks?
One single answer by column

	Beer	Cider	Champagne / Sparkling Wine	Wine	Spirits	Pre-mi: drink
1 Daily	1. <input type="checkbox"/>	1. <input type="checkbox"/>	1. <input type="checkbox"/>	1. <input type="checkbox"/>	1. <input type="checkbox"/>	1. <input type="checkbox"/>
2 4-5 times a week	2. <input type="checkbox"/>	2. <input type="checkbox"/>	2. <input type="checkbox"/>	2. <input type="checkbox"/>	2. <input type="checkbox"/>	2. <input type="checkbox"/>
3 2-3 times a week	3. <input type="checkbox"/>	3. <input type="checkbox"/>	3. <input type="checkbox"/>	3. <input type="checkbox"/>	3. <input type="checkbox"/>	3. <input type="checkbox"/>
4 Once a week	4. <input type="checkbox"/>	4. <input type="checkbox"/>	4. <input type="checkbox"/>	4. <input type="checkbox"/>	4. <input type="checkbox"/>	4. <input type="checkbox"/>
5 2-3 times a month	5. <input type="checkbox"/>	5. <input type="checkbox"/>	5. <input type="checkbox"/>	5. <input type="checkbox"/>	5. <input type="checkbox"/>	5. <input type="checkbox"/>
6 Once	6. <input type="checkbox"/>	6. <input type="checkbox"/>	6. <input type="checkbox"/>	6. <input type="checkbox"/>	6. <input type="checkbox"/>	6. <input type="checkbox"/>
7 Not at all	7. <input type="checkbox"/>	7. <input type="checkbox"/>	7. <input type="checkbox"/>	7. <input type="checkbox"/>	7. <input type="checkbox"/>	7. <input type="checkbox"/>

In German, beer must include beer mixes (Biermischgetränke)

- 3) On your typical drinking occasion, how much do you usually drink of the following?
One single answer by column

	Beer (25cl or 33cl)	Cider	Champagne / Sparkling	Wine	Spirits	Pre-mi: drink
1 Less than one drink	1. <input type="checkbox"/>	1. <input type="checkbox"/>	1. <input type="checkbox"/>	1. <input type="checkbox"/>	1. <input type="checkbox"/>	1. <input type="checkbox"/>
2 1 drink/glass	2. <input type="checkbox"/>	2. <input type="checkbox"/>	2. <input type="checkbox"/>	2. <input type="checkbox"/>	2. <input type="checkbox"/>	2. <input type="checkbox"/>
3 2 drinks/glasses	3. <input type="checkbox"/>	3. <input type="checkbox"/>	3. <input type="checkbox"/>	3. <input type="checkbox"/>	3. <input type="checkbox"/>	3. <input type="checkbox"/>
4 3 drinks/glasses	4. <input type="checkbox"/>	4. <input type="checkbox"/>	4. <input type="checkbox"/>	4. <input type="checkbox"/>	4. <input type="checkbox"/>	4. <input type="checkbox"/>
5 4 drinks/glasses	5. <input type="checkbox"/>	5. <input type="checkbox"/>	5. <input type="checkbox"/>	5. <input type="checkbox"/>	5. <input type="checkbox"/>	5. <input type="checkbox"/>
6 5 drinks/glasses	6. <input type="checkbox"/>	6. <input type="checkbox"/>	6. <input type="checkbox"/>	6. <input type="checkbox"/>	6. <input type="checkbox"/>	6. <input type="checkbox"/>
7 5 drinks/glasses or more	7. <input type="checkbox"/>	7. <input type="checkbox"/>	7. <input type="checkbox"/>	7. <input type="checkbox"/>	7. <input type="checkbox"/>	7. <input type="checkbox"/>
8 Don't know/Refusal	8. <input type="checkbox"/>	8. <input type="checkbox"/>	8. <input type="checkbox"/>	8. <input type="checkbox"/>	8. <input type="checkbox"/>	8. <input type="checkbox"/>

4) How often do you drink 5 or more drinks in a short period of time, e.g. a couple of hours?

One single answer

- 1) Several times a week
- 2) Once or twice a week
- 3) Two to three times a month
- 4) Once a month
- 5) Less than once a month
- 6) Never

5) On which occasions do you typically have a drink?

You can choose several answers

1. During my meals
2. Over a meal with the family / colleagues / friends
3. At parties / outdoor events
4. When out with friends, e.g. in a bar
5. When watching television
6. Special events such as weddings, receptions
7. Other

Consequence of price policy on your consumption behaviour

6a) What is your main criterion of choice when buying alcohol?

One single answer

- 1) The taste
- 2) The alcohol strength
- 3) The occasion
- 4) The price
- 5) The brand image
- 6) The weather
- 7) Your mood at that moment
- 8) The origin or appellation
- 9) As refreshment
- 10) Other

Show the same list as in Q.6a, except the item chosen in Q.6a

6b) What is your second criterion of choice when buying alcohol?

One single answer

- 1) The taste
- 2) The alcohol strength
- 3) The occasion
- 4) The price
- 5) The brand image
- 6) The weather
- 7) Your mood at that moment
- 8) The origin or appellation
- 9) As refreshment
- 10) Other

- 6c) **Show the same list as in Q.6a, except the items chosen in Q.6a and Q. 6b**
What is your third criterion of choice when buying alcohol?

One single answer

- 1) The taste
- 2) The alcohol strength
- 3) The occasion
- 4) The price
- 5) The brand image
- 6) The weather
- 7) Your mood at that moment
- 8) The origin or appellation
- 9) As refreshment
- 10) Other

- 7) If the price of all drinks were to increase by 25%, would you most likely?
- One single answer**
- 1) Drink less in general
 - 2) Drink less often
 - 3) Drink the same
 - 4) Drink less often on weekdays but the same at weekends
 - 5) Drink the same but switch to products that were previously cheaper
 - 6) Drink the same amount but switch to another alcoholic drinks category
 - 7) Buy more in shops and less in the on-trade such as pubs, bars, restaurants, clubs
 - 8) Bring back more / cheaper alcoholic drinks from abroad
 - 9) Consume more home-produced alcoholic beverages
 - 10) Other
- 8) If the price only of the drink you consume most often were to increase by 25% would you most likely?
- One single answer**
- 1) Drink less in general
 - 2) Drink less often
 - 3) Drink the same
 - 4) Drink less often on weekdays but the same at weekends
 - 5) Drink the same but switch to products that were previously cheaper
 - 6) Drink the same amount but switch to another alcoholic drinks category
 - 7) Buy more in shops and less in the on-trade such as pubs, bars, restaurants, clubs
 - 8) Bring back more / cheaper alcoholic drinks from abroad
 - 9) Consume more home-produced alcoholic beverages
 - 10) Other

9) To what extent do you agree or disagree with the following?

One single answer by column

	Total y agree	Tend to agree	Tend to disagre e	Totally disagre e	Don't know
	1	2	3	4	5
A. I don't want to pay more for my alcoholic drinks just because some people drink irresponsibly					
B. I should be trusted to make my own decisions about how much I drink					
C. Alcohol abuse is the problem not the drinks themselves					

10) To what extent can the following measures play an efficient role to help reduce alcohol abuse?
One single answer by column

	Very efficient	Quite efficient	Not very efficient	Not efficient at all	Don't know
	1	2	3	4	5
A. Involve more the doctors who are best placed to advise their patients					
B. Education at school					
C. Education within the family					
D. Increase the price of alcoholic beverages					
E. Enforce the legal purchasing age laws					
F. Enforce the drink driving laws					
G. Specific communication campaigns on TV, radio and posters					
H. Training programs for vendors/servers in shops, bars, restaurants, clubs etc.					



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"As a corporate socially responsible company, Ipsos adheres to the United Nations Global Compact principles."

The UN Global Compact's 10 principles in the areas of human rights, labour, the environment and anti-corruption enjoy universal consensus and are derived from:

The Universal Declaration of Human Rights

The International Labour Organization's Declaration on Fundamental Principles and Rights at Work

The Rio Declaration on Environment and Development

The United Nations Convention Against Corruption

The Global Compact asks companies to embrace, support and enact, within their sphere of influence, a set of core values in the areas of human rights, labour standards, the environment, and anti-corruption:

Human Rights

Principle 1: Businesses should support and respect the protection of internationally proclaimed human rights; and

Principle 2: make sure that they are not complicit in human rights abuses.

Labour Standards

Principle 3: Businesses should uphold the freedom of association and the effective recognition of the right to collective bargaining;

Principle 4: the elimination of all forms of forced and compulsory labour;

Principle 5: the effective abolition of child labour; and

Principle 6: the elimination of discrimination in respect of employment and occupation.

Environment

Principle 7: Businesses should support a precautionary approach to environmental challenges;

Principle 8: undertake initiatives to promote greater environmental responsibility; and

Principle 9: encourage the development and diffusion of environmentally friendly technologies.

Anti-Corruption

Principle 10: Businesses should work against corruption in all its forms, including extortion and bribery.