



# Supporting Local Communities : Assessing the Contribution of Europe's Brewers



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# Supporting Local Communities: Assessing the Contribution of Europe's Brewers

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# Table of contents

## Table of contents

About this report	6
Foreword by Sean Kelly, Member of The European Parliament	9
Foreword by Alberto Da Ponte, President of The Brewers of Europe	10
Foreword by Karen Earl, Chairman of The European Sponsorship Association	11
The author	12
Commissioned by The Brewers of Europe	14
Supported by The European Sponsorship Association	16
Executive Summary	18
<b>Part One   Theory of Community Involvement and Support for the Community</b>	<b>22</b>
Building community ties	23
Sponsorship and commercial support	27
Why sponsorship is different to advertising and is growing faster	27
Trends in Europe	31
Beer compared to other sectors	31
Comparison to levels in previous years	33
How is success measured by sponsors?	34
The outcomes from community support	34
Beer company support	43
Summary of Theory of Community Involvement and Support for the Community	49
<b>Part Two   Impact of Brewers' Involvement and Support for the Community</b>	<b>50</b>
Key research findings	51
What types of activities are supported by brewers?	52
Outcomes of brewery support as reported by brewers, recipients of support and the general public	54
Summary of Impact of Brewers' Involvement and Support for the Community	81
<b>Part Three   Evaluating the Value of Brewers' Community Involvement</b>	<b>82</b>
Economic value	83
Value for rights owners	84
Value for communities	85
Summary of Value of Brewers' Community Involvement for the Community	87
<b>Bibliography, Credits &amp; References</b>	<b>88</b>
<b>Glossary</b>	<b>90</b>
<b>Appendix - Questionnaire</b>	<b>92</b>

# About this report

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## About this report

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This report was commissioned by an invitation to tender issued from The Brewers of Europe through The European Sponsorship Association (ESA). The brief was to undertake a survey of breweries and recipients on their reach into the community and blend this with research and other data to build an independent picture of the size and importance of brewers' support to the community through sports, arts, education, and culture, at a national and local level.

The aim was to test the assumption that the 3,300 small, medium and large brewers across Europe make an important contribution to the wellbeing, culture, leisure time and knowledge of EU citizens and local citizens.

The brewing sector historically has a long tradition in small scale community and regional level sponsorship and support. To examine the practical result of this tradition this report attempts for the first time ever to quantify the scale and the value across Europe.

A consortium of ESA members combined to carry this out and their work was on several levels. It involved collecting data from brewing companies and recipients of support, surveying the general public on the effects of brewery funded support, and presenting case studies and viewpoints from breweries and events and organisations.

This approach was to identify as many as possible of the smaller actions and supports which receive much less exposure and attention than better known large sports sponsorships for example. The resulting data and viewpoints were set against a wider view of the trends being taken in modern sponsorship, especially in efforts being made by brands of all kinds to be seen to bring a tangible value and benefit to events, fans and organisations.

# Foreword

## Foreword by Sean Kelly, Member of The European Parliament

Community involvement benefits everybody involved, from the citizens themselves to the event organisers and, in this case, the brewers. The brewers are one particular sector that has played a continued role in community involvement and sponsorship. Their contribution and support has been imperative to the evolution of matters national, local and regional, from grassroots sport to cultural exhibitions to charity.



In my previous capacity as President of the Gaelic Athletic Association - the largest sporting organization in Ireland - there was criticism in some quarters that the All-Ireland Championships were sponsored by a famous Irish brand of stout.

I took a proactive approach to this matter by on the one hand vetting all advertisements before they were aired on national television and printed on billboards across the land. On the other hand I initiated the Alcohol and Substance Abuse Prevention Programme (ASAP) which saw dedicated officers appointed in all clubs to tackle these social ills from the grassroots upward.

We must also not forget the cultural, tourist and heritage value of brewers and beer consumption across Europe. A large proportion of brewers are SMEs and produce a quality, niche product which can attract cultural and touristic interest to particular regions, generating positive spin-offs for the local economy.

Of course, community involvement is very much sustained by the spirit of voluntarism and, as 2011 is the "European Year of Volunteering", it is imperative that voluntary organizations are supported now more so than ever as their contribution is even more critical in these difficult times we face.

In a time of economic austerity, the support given through sponsorship by the various brewers can help rebuild the people's morale and wellbeing. This is important for the health of Europe's social market economy. The brewers continue to take their social responsibility seriously, something which I welcome.

*Sean Kelly*

**Sean Kelly**  
Member of The European Parliament

## Foreword

by Alberto Da Ponte, President of The Brewers of Europe

Europe's brewers have traditionally been close to their local communities, brewing mostly local brands that are often only consumed locally.

Among brewers it has long been assumed that the thousands of small, medium and large brewers across Europe make a significant contribution to local culture and to the lives and leisure activities of Europe's citizens. 2011 is the year to test that assumption by having this tradition examined and quantified objectively.

The results are impressive, with this report's authors tracking down and capturing more than 8,000 examples of community involvement by Europe's brewers. Although there are almost certainly thousands more activities that have not been captured by this first exercise, it has been estimated that brewers' community support in the EU represents almost €1 billion annually. We can also see that the majority of brewers' contribution to communities is directed at the local level, with 62% of total beer funding going to community based events and only 11.9% for major sports events. These results highlight how the involvement of brewers in communities benefits not just brewers but especially event organisers and Europe's citizens.

Brewers are continuing to meet the growing expectations of citizens and government. There is a trend towards companies no longer merely focusing on economic success, but also focusing on their social and environmental impact and investing at grass roots levels in education, health, sport and culture. Through its commitment to communities, the brewing sector is embracing this role. We are therefore delighted to see from the report clear public support for our involvement and that there is also recognition from organisers that many local activities would not take place if they were not supported by the brewing sector. Europe's brewers are justifiably proud of the roles that they play in their local communities and collectively this support amounts to an important economic, social and cultural contribution to European society.

At a time when national, regional and local governments are reducing public funding for activities in these areas, they are looking to the private sector to plug the gap and despite recent dramatic increases in beer taxation across the EU and the impact that this has had on the sector, brewers will make every effort to maintain their commitment and contribution to their communities. When the European Commission publishes its Communication on Corporate Social Responsibility later this year, I am sure it will reflect that this kind of support can help to build and rebuild trust in business, which is vital for the health of Europe's social market economy.

On behalf of The Brewers of Europe, I would like to thank Sponsorship Ideas for carrying out this research project, and The European Sponsorship Association (ESA) for its support notably, though not exclusively, in reaching out to the event organisers who depend on brewers' support. This report shines a light on the important work that brewers across Europe are undertaking in their communities and the case studies highlighted herein serve as poignant examples of the need to keep up the good work and for governments to support this form of engagement and sponsorship of activities.



**Alberto Da Ponte**  
President of The Brewers of Europe

## Foreword

by Karen Earl, Chairman of The European Sponsorship Association

It has been interesting for The European Sponsorship Association to lend its support and knowledge to The Brewers of Europe on this research project. There has never before been such a detailed analysis of the breadth and range of support provided by breweries to community-run activities across Europe.

It is clear that many rights owners at all levels, from the organisers of local sports and social clubs to those managing major international events, have benefitted over a long period from the support of breweries. There has been a long-running association and close synergy between beer brands and the social and entertainment side of sport. Both through sponsorship and the provision of products and financial support, clubs and events have gained extensive support from the breweries. This report clearly demonstrates the massive value of that contribution, and how much this is appreciated, and relied on, by many rights owners throughout Europe.

As the trade association for sponsorship, ESA has members from all sides of this marketing activity, and we aim to raise standards and provide information and data that furthers knowledge and understanding regarding sponsorship. We have been working for many years to represent our rights-owner members and to promote their freedom to choose appropriate partners and work together to the benefit of their events. This research into brewery support of the community demonstrates how valuable such sponsorship is, how beneficial it can be for everyone involved, and how essential it is in supporting sport, culture and other activities that are part of the social fabric of Europe.

**Karen Earl**  
Chairman of The European Sponsorship Association



# The author

## William Fenton

William Fenton runs Sponsorship Ideas and is also Editor of The World Sponsorship Monitor. He is co-author of The Sponsorship Handbook and has 19 years of experience in sponsorship and a strong background in research.



He is Editor of The World Sponsorship Monitor, has been published in The International Journal of Sports Marketing & Sponsorship & The Journal of Sponsorship and lectures at the HUB Business School and the VUB University in Brussels as well as leading online webcasts. A frequent international conference speaker, he has appeared on CNBC television's Money and Sport, holds the Market Research Society's Advanced Certificate in Market and Social Research Practice, and is a founder member of The European Sponsorship Association's Continuous Professional Development Accreditation programme. To conduct the survey research in this report IFM Sports Marketing Surveys were appointed as sub-contractors.

### → About IFM Sports Marketing Surveys

IFM Sports Marketing Surveys is the leading global full-service provider of research and consultancy in sports marketing and sponsorship. The company offers informed services and integrated solutions of media analysis, market research and consultancy.

With group headquarters in Karlsruhe, Germany and Surrey, UK, IFM Sports Marketing Surveys operates out of many regional offices with representation on all continents. The company draws on the combined strength of some 280 personnel across its global office network to provide worldwide consultancy and business solutions for the industry.

IFM Sports Marketing Surveys adheres to the regulations of ESOMAR, the European Market Research Association. Company research executives are members of the Market Research Society and are thus bound by a strict code of conduct that ensures confidentiality and best practice.

# Commissioned by The Brewers of Europe

## Commissioned by The Brewers of Europe

In Europe there are around 3,300 breweries together producing around 380 million hectolitres of beer each year. Europe's breweries provide jobs directly for 132,000 people, whilst it has been estimated that 2.1 million jobs can be attributed to beer, notably in the supply, hospitality and retail sectors. The contribution of beer to the European economy in terms of value added has been calculated at 51 billion euros per year, equal to around 0.43% of total EU GDP.\*

The Brewers of Europe currently represents 27 national brewing associations and around 95% of the beer brewed in the EU. The Brewers of Europe is a founding member of the EU Alcohol and Health Forum and committed to being part of the solution when it comes to tackling alcohol misuse.

\* Figures taken from *The Contribution made by Beer to the European Economy*, Ernst & Young, 2011.





# Supported by The European Sponsorship Association

## Supported by The European Sponsorship Association

The European Sponsorship Association (ESA) is the trade organisation of the sponsorship industry in Europe. Its members are drawn from across Europe and range from brand owners, sponsorship agencies and consultancies, to rights owners (including sports teams, events, governing bodies and cultural organisations), and also include a number of suppliers and professional advisers such as lawyers and accountants associated with and working in the sponsorship industry. As such it is able to provide an independent, objective and authoritative view on all European sponsorship matters.

ESA is committed to corporate responsibility and best practice and strives to raise industry standards through establishing self-regulation and through education and the ESA Continuous Professional Development (CPD) scheme. It also runs education briefings and workshops and an annual two-day conference. It provides members with a library of information and encourages continued learning. In addition to its networking activities, ESA is active in policy and governance, representing the sponsorship industry at national and EU levels.

# Executive Summary

## Executive Summary

In times of growing pressure on public funding and when public-private partnerships are increasingly called upon to fill the gap, the involvement of all types of sectors including brewers is more than ever needed to support national, local and regional events within the community, from grassroots sport to cultural exhibitions to charity events.

### Why has this report been developed?

This independent report sets out to test the assumption that Europe's brewers have a long history of contributing to European society through sponsorships and other types of community support. It also examines the feeling that, while some major high-profile sports sponsorships may take prominence, in fact the majority of contributions by brewers takes place in local communities and benefits several different sections of society. It is the first report of its kind to attempt to assess the value of this support by brewers to rights owners (the organisers of the activity being supported) and to society in general.

## Assessing the impact of brewers' involvement in communities

The report looks into the theory of community involvement and support, and then using case studies and research conducted amongst brewers and rights owners (such as event organisers), it considers the brewers' involvement in the community and the views of those receiving this contribution as well as noting the opinions of the general public on this form of support by the brewing sector.

### Notable overall findings are:

- ▶ Well over €900 million (€928,079,225) is spent annually in the European Union by the brewing sector in supporting the community.
- ▶ The events supported by approximately 3,300 European breweries cover a wide breadth of activities, ranging from sports (grassroots and professional events) to culture and music, but the majority are community-related projects, which represent 62% of all activities supported.
- ▶ Community involvement by brewers is not just about mega-deals. Only 11.9% of the deals analysed go to professional sports. The average spend per deal is €68,208, which drops to €8,544 if taking out the major deals.
- ▶ The majority of the sponsorships and community supports studied are at either local (36%) or regional (48%) levels.
- ▶ Brewers have for a long time been involved in areas where there is big recent growth such as cause-related activities, festivals, and education. This marries up with a new trend in sponsorship for engagement with the community and employees. Sponsorship is now generally seen as a loyalty builder rather than just a sales medium.
- ▶ The brewing sector, rights owners and the general public think that community involvement of the brewers is legitimate and benefits citizens and events through greater publicity, lower ticket prices and enhanced events.
- ▶ Indeed there is a majority view that beer is appropriate to entertainment and social events such as sport, culture and music festivals and people have an expectation that beer will be involved. Beer is felt to be as appropriate a sponsor as any other sector.
- ▶ Only 12% of the public think that it would be easy to replace brewery sponsorship of an event, with 77% of brewers and rights holders saying that there would be significant impact from losing brewers' support.
- ▶ The public believe that taste, store promotions and word of mouth drive brand affiliation more than sponsorship and don't expect cheap beer to be served at events or for it to change their overall consumption habits.

The diversity of the brewing sector is reflected in the wide spread of over 8,000 activities supported by the brewing sector and analysed for this report. These include major and grassroots sport events, culture and arts, charity, conservation and environment, shows and exhibitions, and city and community events. There are also numerous other activities that were not captured by this report's attempt to assess and quantify the extent of brewers' support to Europe's communities.

Being involved in the community has always been a tradition for the thousands of breweries in Europe, with 52% of the public stating that beer should support local communities and 42% of them also saying that beer makes events more enjoyable.

Beer is a local product and European brewers are well rooted in their local community, where they support a considerable range of small activities, from the town festival to the local amateur sport club. They provide cash and in-kind support to events which the public believe would otherwise struggle to exist without it. Brewers therefore contribute to the development and to the coherence of the local life and community, providing social benefits to European citizens after playing or whilst watching sport, when enjoying a music festival, or whilst taking part in a charity or a local town festival.

The value of support by brewers is also considered in this report in the wider context against other research in this area. This analysis supported the findings that the value of such sponsorship and support is essential for rights owners, who rely on it to maintain their activities, and without it would struggle to find any alternative funding, since there are no other similar sectors that would provide such relevant and broad support. Additionally, this report established the enormous value to the community gained from this brewing sector support and that the general public have broad acceptance and appreciation of this, as it greatly enhances the social, economic and cultural benefits to individuals and to society in general.

## Conclusion

This report shows how important brewers' involvement in the community is for the European Union and its citizens. Brewers are recognised by the general public as traditional and legitimate supporters of many local and regional activities, ranging from sport to culture and from community to charity. The majority of brewers' support happens at local and regional level and so does not generate media attention, but it provides many benefits to the community and to the well-being of European citizens. The value of the provision of over €900 million per year by brewers is clearly an essential benefit and support both to rights owners and to the community as a whole.

# Part One

## Theory of Community Involvement and Support for the Community

### Building community ties

Community involvement is especially important to the brewing sector as it is often a very regional product and affects a good many of the local population with its economic presence as well as often being a big part of the fabric of community life and social life. While community involvement and sponsorship are often perceived to be the same, there is much activity that is indeed philanthropic or “bénévolat”/“mécénat”. Some breweries take part in the local community simply because the brewery, the owner and the employees are attached and belong to the community and want to contribute.

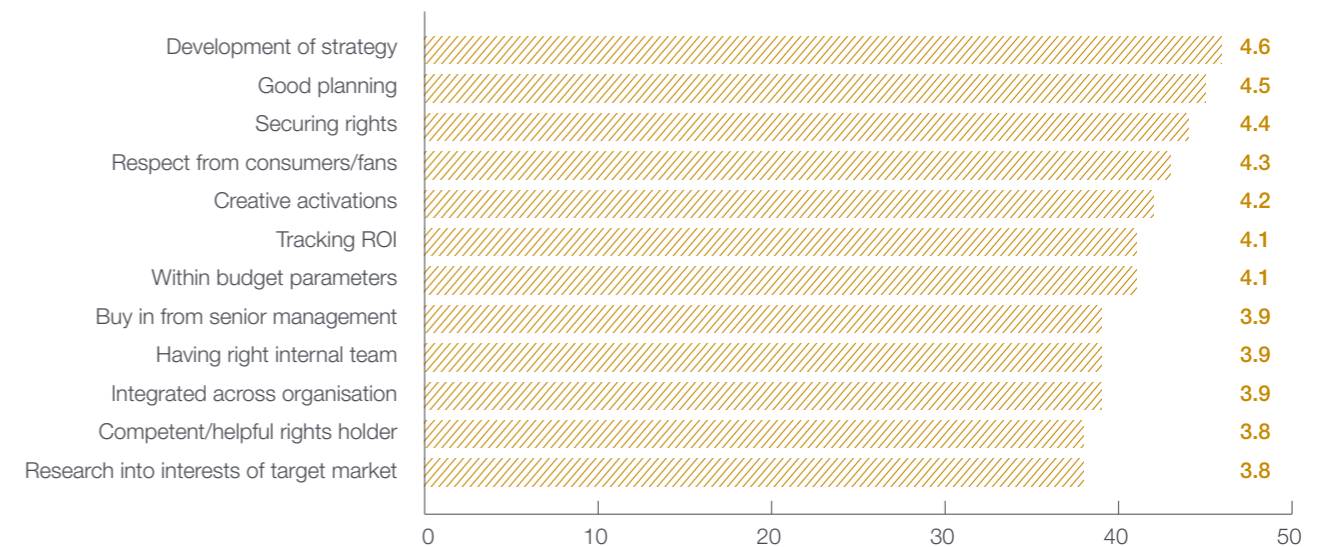
The word ‘sponsorship’ has a higher recognition and of course is used heavily by the brewing sector and most people are familiar with beer sponsorships of large sporting events. This type of support is resolutely a part of marketing although it is evolving into a much more sophisticated medium which in order to work well aims to establish a genuine connection and be seen to bring benefit other than just financial.

Social evolution has impacted how corporations see their role in society. Companies can no longer merely focus on economic success in terms of profit and dividends. Now they also have to focus on their social and environmental impact. This has led companies to invest at grass roots levels in education, health, sport and culture, aiming not only to make a contribution at the local community level but also to have a global impact. For the brewing sector this ties into a long-lasting tradition of community involvement. What is certain is that this type of support is more than just advertising, and these days creating an emotional association with the product and building loyalty is the primary aim.

Sponsors have to work hard to earn respect and legitimacy if they want to appear as more than just advertisers at an event. When The European Sponsorship Association asked sponsors the keys to success, gaining respect was amongst the most important criteria.

› Fig. 1

› Fig. 1 / Key factors to successful sponsorship



› Source: ESA

This case study is a good example of a brewer understanding the audience of a leisure activity.

On top of all this the last few years have seen a tremendous increase in sponsorships which try to work simultaneously on several different levels such as bundling grassroots community initiatives along with a major elite sport sponsorship. This case study from Scotland is a good example:

📄 **CASE STUDY**

<b>Brewer</b>	Foster's
<b>Title</b>	Edinburgh Comedy Awards
<b>When</b>	2010 and beyond
<b>Where</b>	Edinburgh, Scotland

Humour plays an important role in the lives of our target market.

Supporting a local sports, arts or city festival that is close to people's real interests and enthusiasms is a key way of building this respect and the brewing companies have long been masters at doing this.

**Commercial outcome**

- ▶ Local sales.

**Community impact**

"We know humour plays a large and important role in the lives of our target market. Foster's sponsorship of the Edinburgh Comedy Awards underlines our claim that "Foster's is serious about comedy"

**Mark Given**, *Brands Director at Heineken*

📄 **CASE STUDY**

<b>Brewer</b>	Tennent's
<b>Title</b>	'Could Have Been a Player'
<b>When</b>	2011
<b>Where</b>	Glasgow, Scotland

Fans can train on the club's pitches.

**What**

32 fans of Celtic and Rangers can train on the clubs' pitches, participate in a one-off match, attend a soccer boot camp or win a VIP day in the Tennent's lounge.

**Commercial outcome**

- ▶ Helps activate and publicise the bigger multi-year sponsorship of both clubs.

**Community impact**

- ▶ Once in a lifetime experience.
- ▶ Emphasis on soccer for physical fitness.

To underline this trend, and contrary to the perception, most forms of support are much smaller than the headline World Cup or Champion's League deals we hear so much about. Sponsorship is very strong at the very top (over \$10 million) and at the bottom. The most common sponsorship numerically speaking around the world is bought at between US\$150,000 and \$500,000, as seen in Fig. 2.

"The larger international sporting events attract major brands and significant sponsorship revenues and have traditionally been seen as potentially the most effective. However the consumer is aware that sponsorship can work beyond major events - 51% disagreeing with the statement "Sponsorship only works for large international sporting events". (IFM Sports Marketing Surveys 2004)

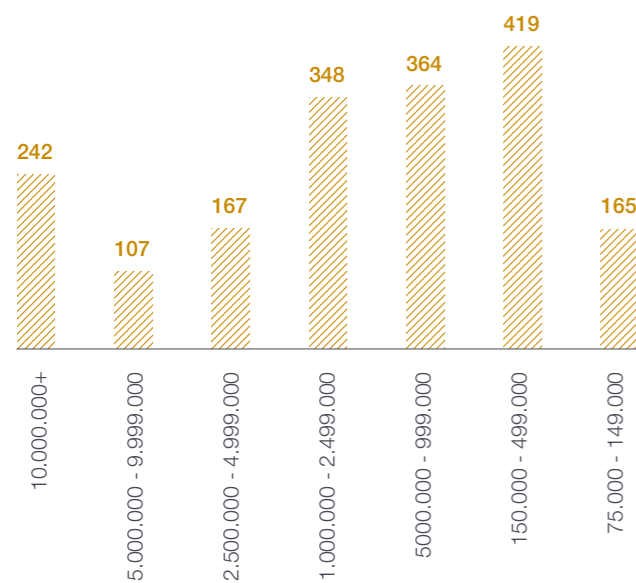
Indeed in spite of the familiarity with the perception of beer and very large international multi-million sports sponsorship the average spend on a support or sponsorship by brewers in Europe is €68,208, and very many of the funding supports, from breweries analysed in this report fall well below €10,000. Indeed when talking out of consideration the big sports sponsorships the average is €8,544. As these are so small they are never widely publicised but they do have positive outcomes at a local level.

Sponsors are looking for immersive sponsorship opportunities and the consensus (according to the SportBusiness Sponsors' Survey 2010) is that a multi-strand strategy is the best approach. What this means is that being seen to have helped in allowing individuals to experience arts, sporting and cultural events on a grassroots or local scale is felt to be beneficial.

Another trend is that public services such as museums, libraries and even government departments, who are always under budget pressure, will increasingly look at what assets they can offer to external funders. In addition as society and technology changes ever faster, those looking for support and sponsorship enter new arenas, the growth in live music being one good example.

› Fig. 2

› Fig. 2 / Reported Deals, all industry sectors worldwide / Number of Deals by \$ Value Band 2010



› Source: TWSM 2010

## Sponsorship and community support

## Why sponsorship is different to advertising and is growing faster

Sponsorship is a little easier to define than community support but calls to rename it 'partnership' are getting louder as sponsorship is seen to have a clear distinction from advertising in its ability to create genuine goodwill by allowing events and activities to occur that have a demonstrable benefit to those who follow them.

The International Chamber of Commerce (ICC) is working on a revised chapter on sponsorship within their Code of Marketing to reflect this but for now their current definition is the most quoted:

*"Any commercial agreement by which a sponsor, for the mutual benefit of the sponsor and sponsored party, contractually provides financing or other support in order to establish an association between the sponsor's image, brands or products and a sponsorship property in return for rights to promote this association and/or for the granting of certain agreed direct or indirect benefits."*

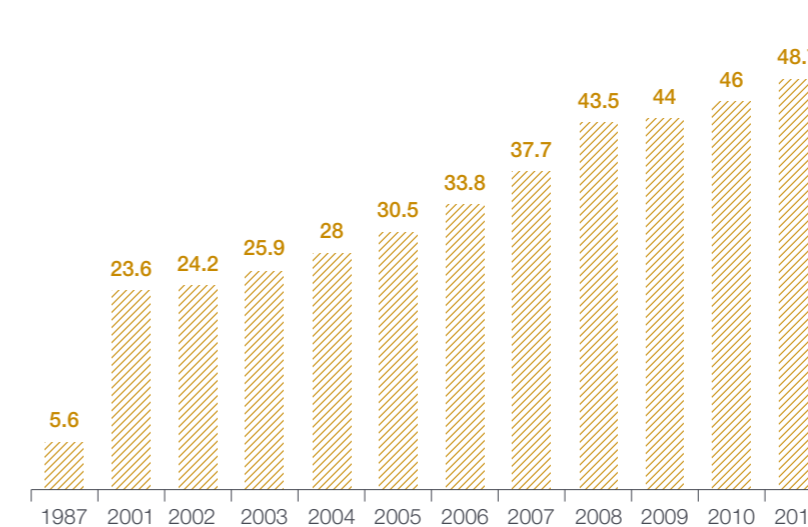
(ICC Consolidated Code 2006)

Economic development is currently focusing attention on sponsorship as a marketing tool because of the aspirations that greater economic freedom brings to individuals. As relative prosperity becomes the norm, so more money is available to allocate, first, to burden-reducing services, and then to leisure pursuits. Fully mature markets have now moved into an experience economy where people are looking for self-actualising experiences. This is a need to which brands are responding, whether it is the 'terrific experience' of dining at Pizza Hut, shopping at Apple or applying a grooming product. The challenge for many brands is to make these experiences real for customers. Sponsorship facilitates the bringing alive of brand experiences and offers the chance to build brand loyalty rather than simple customer acquisition. The days have gone when companies spent a major proportion of the advertising budget on TV, now it is spread across online and non-traditional advertising techniques which strive to talk directly to consumers.

It would be surprising if beer related sponsorship had not grown along with the growth of sponsorship in general which has shown impressive growth and maturity in the last ten years. There has been 90% growth in all forms of sponsorship compared to 50% in advertising in that period. (Source : IEG, Zenith Optimedia, WARC)

› Fig. 3

› Fig. 3 / Global Sponsorship Rights Spend \$USb. 1987-2011



› Source: IEG

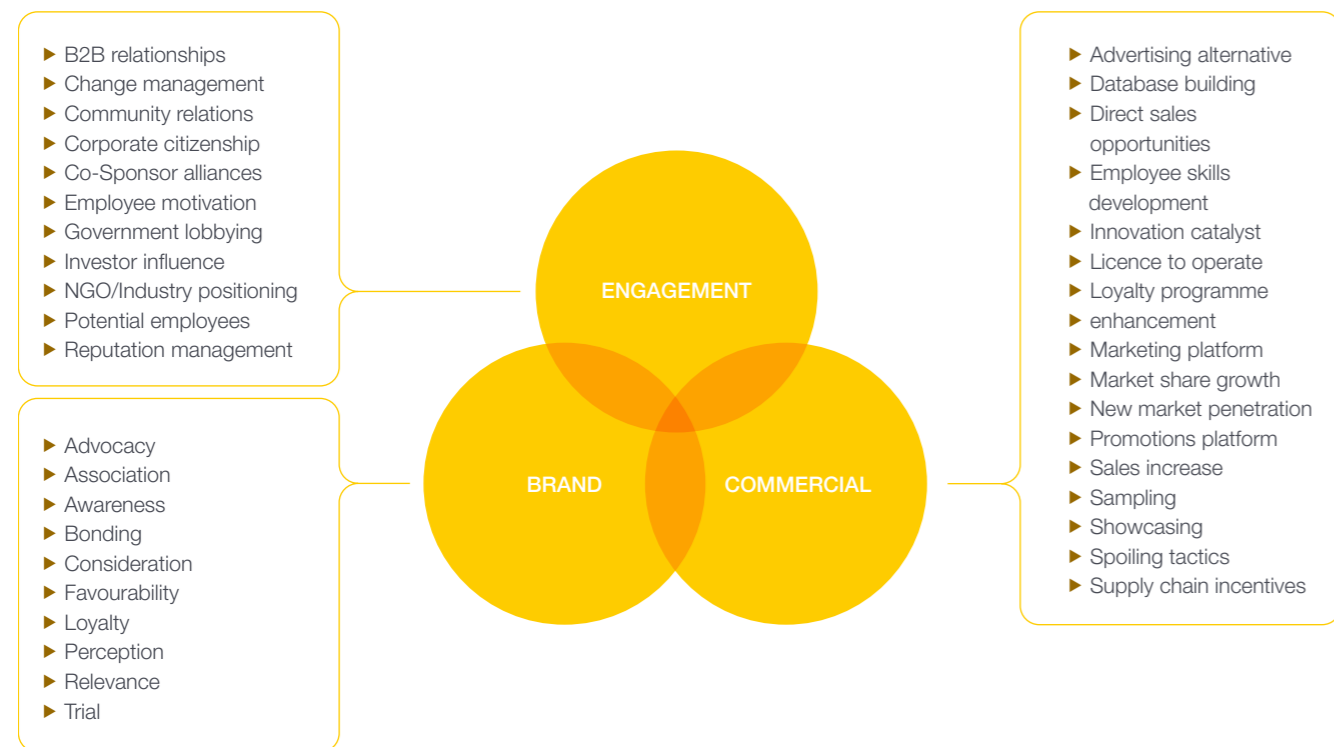
While advertising still outspends sponsorship by many times, most industry observers consider that (as a rough average) around the world sponsorship is equal to around 7% of advertising expenditure. Market watchers IEG in the USA expected global 2011 spending on rights fees to be around \$48.7 billion. This was backed by a June 2008 report by PricewaterhouseCoopers (PWC) on the global entertainment and media (E&M) market 2008-2012 predicting that global sponsorship expenditure will increase from US\$42.7 billion in 2007 to just under US\$60 billion by 2012.

Of particular note is the continued growth in sponsorship during the 2008-9 recession, albeit at a slower rate than previous years, at a time when advertising spend contracted by around 5%. The increased investment in sponsorship is also explained by the fact that sponsorship is an incredibly flexible medium that can perform many different jobs.

In its Sponsorship Assessment and Evaluation Guidelines, The European Sponsorship Association (ESA) distinguished three different groups of sponsorship objectives, as shown in Fig.4 below.

> Fig. 4

> Fig. 4



> Source: ESA

One key area in recent years has been an urge to offer benefits and a feeling of 'doing good' to the company's employees as in this case study from Ireland.

**CASE STUDY** 

<b>Brewer</b>	Guinness
<b>Title</b>	Arthur Guinness Fund
<b>When</b>	2009-2011 (and ongoing support)
<b>Where</b>	Ireland (though Arthur Guinness Fund is also a global initiative)

**What**

The Arthur Guinness Fund was established in 2009 as part of the Guinness 250 celebrations. For every consumer signature next to Arthur Guinness' in pubs, up to one million, Guinness donated €2.50 to the fund, creating a fund of €2.5 million for communities in Ireland.

The ethos of the fund is 'From one to many. Creating opportunities for communities'.

The Arthur Guinness Fund supports social entrepreneurs who have innovative initiatives that can deliver sustainable benefits for communities across Ireland.

The fund looks for people who have big ideas, from all walks of life and who are passionate about making a difference to the social, community and environmental landscape in Ireland. The Arthur Guinness Awards programme, working in partnership with Social Entrepreneurs Ireland, is looking to find and support up to 25 social entrepreneurs over a two-year period within Ireland.

Successful applicants benefit from a significant level of financial support up to €100,000 per project. The awardees also have access to a two year leadership development programme delivered by Guinness and access to the alumni network provided by Social Entrepreneurs Ireland.

Proceeds from ticket sales from the Arthur's Day annual music event in September also go to the Fund.

**Commercial outcome**

- ▶ Helps connect with target consumers.
- ▶ Builds loyalty and goodwill.
- ▶ Positive corporate social responsibility aspect to huge commercial success of Arthur's Day.
- ▶ The Guinness brand has a Facebook campaign with Irish sports stars and celebrities who have partnered with Arthur Guinness Fund awardees and give regular updates on progress of activities.

**Community impact**

- ▶ Hugely positive response from communities across Ireland. 2011 saw almost 500 applications to the fund with applications from every county in Ireland.
- ▶ Arthur Guinness Fund 2010 awardees are making positive social change in communities across Ireland.

**Once in a lifetime experience**

- ▶ Opportunity for consumers to get involved in driving positive social change in communities in Ireland.

**Employee engagement**

- ▶ High levels of engagement from employees in all sites across Ireland, employees from all sites review the applications to the fund and help decide which projects we should support.
- ▶ Employees from all Guinness Irish brewing and packaging sites are involved in reviewing applications and supporting the projects.
- ▶ Provide ongoing support workshops to awardees tailored to their specific needs. These workshops are run by Guinness employees who have expertise in that area.

This study from Bulgaria shows direct action helping NGOs.

CASE STUDY

<b>Brewer</b>	Zagorka Brewery
<b>Title</b>	Donation program 'Brewing a better future'
<b>When</b>	2011
<b>Where</b>	Stara Zagora, Bulgaria

All interested NGOs are eligible to submit structured applications for financial aid.

**What**

- ▶ Public Donation Tender on local level Stara Zagora region.
- ▶ All interested NGOs are eligible to submit structured applications for financial aid under one of the following Focus Areas:
  - Environment
  - Health
  - Education

**Commercial outcome**

- ▶ Increase awareness of Company's values and Social Responsibility activities.

**Community impact**

- ▶ Establish partnerships for progress.
- ▶ Meet the needs of region's citizens.

### Trends in Europe

In spite of recent growth in Asia, Europe is still the second biggest sponsorship region after the USA.

› Fig. 5

Worldwide 87% of sponsorship money goes to sport (source TWSM) but in Europe when The European Sponsorship Association asked sponsors the areas with the biggest potential for growth it was the non-sports sectors that were picked out. It should be noted that this report shows beer sponsors especially have been active in these sectors.

› Table

*Sponsorship Activities Likely To See Most Growth*

Cause related	40%
Concerts/Festivals	30%
Stadia/Venues	30%
Education	26%
Music	4%
Football	23%
Extreme Sports	21%

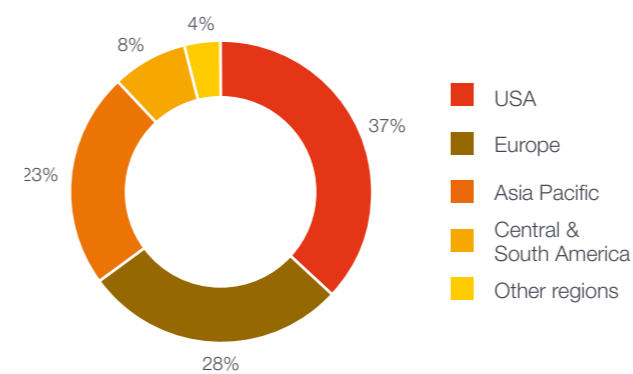
› Source: The European Sponsorship Association

### Beer compared to other sectors

The World Sponsorship Monitor (TWSM) provides a comparison of how beer's involvement (disregarding licensing and donations and other forms of support) compares to that of other sectors. The data is not limited to Europe only but provides a useful relative measure.

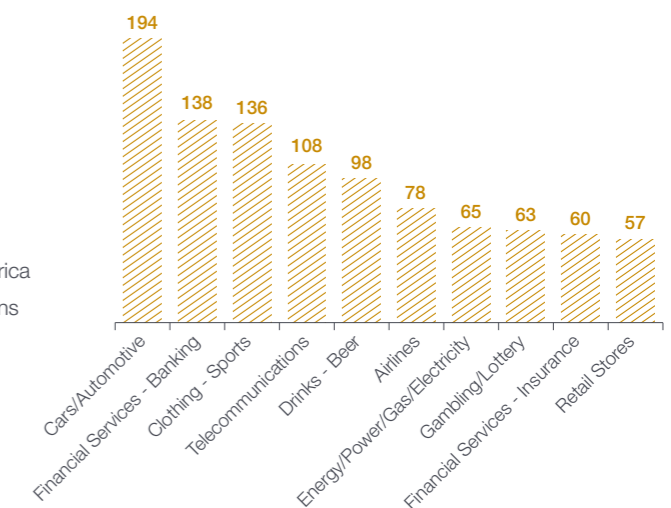
› Fig. 6

› Fig. 5



› Source: IEG

› Fig. 6 / Top 10 Sponsoring Industries in number of deals reported 2010



› Source: TWSM



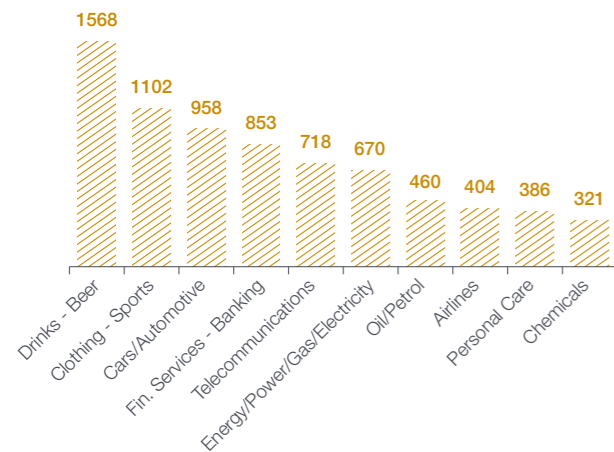
When looking at the investment compared to other sectors based on the sample of international deals in TWSM, beer was the top category. However it should be noted that the top position of beer worldwide in 2010 was largely accounted for by Bud Light's 6 year \$1.2 billion NFL (American football) deal replacing Coors Light, the NFL's official beer since 2002.

› Fig. 7

When looking at Europe in isolation and at the sample of deals in the TWSM database beer was the third biggest sponsor in 2010.

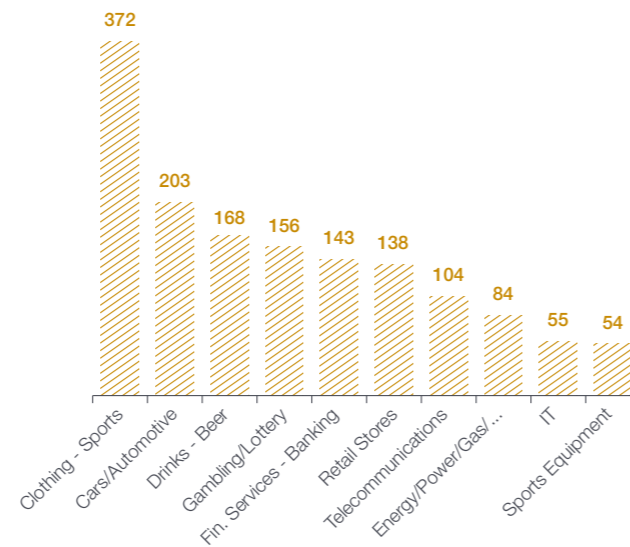
› Fig. 8

› Fig. 7 / Top 10 Spending Industries in Total Reported Value 2010\$m.



› Source: TWSM

› Fig. 8 / Top 10 Sponsoring Industries Europe 2010 in number of deals reported



› Source: TWSM

## Comparison to levels in previous years

This pattern has been consistent over many years.

› Number of reported deals 2005- 2010

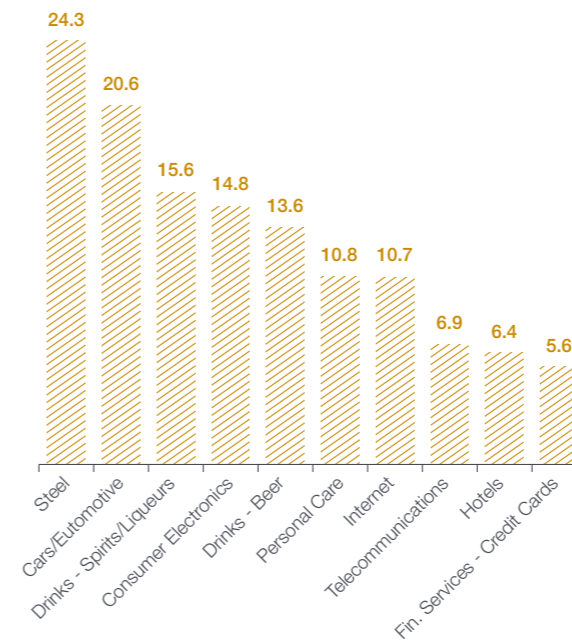
2005	2006	2007	2008	2009	2010
Cars/Automotive 186	Cars/Automotive 115	Banking 129	Cars/Automotive 156	Clothing-Sports 186	Cars/Automotive 194
Telecommunications 141	Banking 102	Cars/Automotive 125	Banking 123	Cars/Automotive 145	Banking 138
Clothing-Sports 139	Telecommunications 72	Drinks-Beer 76	Clothing-Sports 100	Telecoms 99	Clothing sports 136
Banking 138	Sports clothing 65	Clothing-sports 68	Drinks-beer 83	Banking 98	Telecommunications 108
Drinks-Beer 89	Drinks-Beer 59	Con.Electronics 55	Telecoms 80	Airlines 73	Drinks-Beer 98

› Source: TWSM

Isolating sport and looking only at Arts & Culture deals in the TWSM sample we see beer in 5th position relative to other sectors in reported spend in the TWSM Top 10.

› Fig. 9

› Fig. 9 / Top 10 Sponsoring Industries in Arts & Culture 2010 in reported commitment \$m.



› Source: TWSM

## How is success measured by sponsors?

The new emphasis on building authentic connections with consumers means that sponsoring companies are moving from measuring media gained as a result of sponsorship to trying to gain insight on whether the sponsorship is having an influence on brand consideration, propensity to purchase, loyalty and image. Modern sponsorship is much more about creative marketing than just buying exposure.

The Holy Grail of sponsorship evaluation is calculating the real outcomes from a sponsorship. The figure that most senior managers would like to have reported is the link between sales and sponsorship activity.

This is difficult because it is hard to isolate sponsorships from the other elements of the marketing mix; there are external events, competitor activity, even seasonal variations (especially in the beer market) that affect sales. This report shows that European consumers don't see sponsorship as an aggressive sales medium but a loyalty builder for supporting brand share and that brewers, like most sponsors, therefore rely on soft measures such as generating goodwill, building local roots or making employees feel proud of the company.

## The outcomes from community support

### → What benefits this offers to EU citizens

As this report shows there are numerous sporting, artistic and community activities that simply would not be able to exist without support from the commercial world.

Even if the event were able to self-finance, ticket prices would need to be higher and support therefore softens the cost burden on the public. The survey conducted amongst the general public for this report clearly shows an understanding that not only do supporters help with finance but they can also help the event or organisation to promote itself more widely. As this report shows when interviewing the general public in six European countries the ability of sponsors and supporters to enhance an event ranks above even the ability to keep ticket prices lower. These enhancements include, having the product available for sampling at the event, having the budget to help bring the event to more people by online means, and conferring a certain prestige upon the event or activity by having commercial supporters. In short these enhancements increase the enjoyment of leisure time and cultural pursuits of the citizens of Europe.

This report goes on to show that in the case of beer 62% of total beer funding goes to community based events, more than major sports events at 11.9%.

Sport has a recognised role in European society for health and wellbeing and major sports are just the most visible part of most sports, with many millions either enjoying following the sport as fans or participating themselves at a grass roots level.

The following case studies show examples of how this blend of elite and mass sport is supported by the brewing sector. The Estonian brewer in the case study below has produced benefits to society through associating with a venue.

## CASE STUDY

**Brewer** A. Le Coq

**Title** A. Le Coq Arena

**When** Since 2001

**Where** Tallinn, Estonia

## Estonia's largest and most modern Training Complex.

### What

The A. Le Coq Arena is the main Estonian football arena in Tallinn and also Estonia's largest and most modern Training Complex which contains a football stadium which meets the requirements of UEFA and FIFA and there are also two natural grass and two artificial grass covered training grounds.

A. Le Coq Arena has capacity of 9,692 seats plus seats in the stadium VIP sectors.

### Commercial outcome

- ▶ Supports Estonian Football Association.
- ▶ Supports football as a team sport.
- ▶ Backed by a yearly payment of the long term agreement with FC Flora which is Estonia's number one football club.

### Community impact

- ▶ 15 years grant agreement with FC Flora.
- ▶ Brings world class football to Estonia.
- ▶ Also brings to Estonia world-famous rock-stars like Lenny Kravitz and Aerosmith.

This case study looks at support of mass participation events.

## CASE STUDY

**Brewer** A. Le Coq

**Title** SEB Tartu Complex Event  
(Tartu Maraton)

**When** Since 2000

**Where** Estonia

### Fostering active weekends in nature with friends and family.

#### What

Club Tartu Maraton is the organiser of Estonia's best-known multi-discipline public mass-sport events series. Club Tartu Maraton organises the SEB Tartu Complex Event consisting of Tartu Maraton (cross country skiing marathon), Tartu Jooksumaraton (running and nordic walking race), Tartu Rattaralli (cycling road race) and Tartu Rattamaraton (mountain bike race). More than 27,000 people from Estonia and other countries attend and the number of participants is growing every year.

#### Commercial outcome

- ▶ Supports SEB Tartu Complex Event (financial and drinks).

#### Community impact

- ▶ To foster sport and outdoor activities in Estonia.
- ▶ To foster active weekends in the nature with friends and family.
- ▶ To introduce places of natural beauty in Estonia through sport activity.
- ▶ To also support people not well trained or just having started training as all events also have shorter distances.

#### → What benefits this offers to the brewers

As we have seen there is an agreement that sponsorship is a commercial agreement conducted for business benefit. However this is not by any means just in generating sales but in communicating with audiences that the company needs to engage with and to explain its activities to. Nearly all companies need some kind of dialogue with special interest groups and support of activities is often used to help in achieving this.

Deepening relationships with both local and wider communities is a prized asset. Many of Europe's 3,300 breweries (Ernst & Young 2011) are based in local communities and according to Ernst & Young there are "a significant number of independent small and medium brewing companies and microbreweries." Some of them often have a monopoly on the products sold there and employ a significant number in their community. For these types of companies local benefits and relationships are very important.

#### → What benefits this offers to the recipient organisations

Most sports, arts, community and charity organisations (rights holders) are starved of funds and resources which prevents them from maximising their objectives or their reach and awareness. While cash is often vital in allowing an event to take place the recession has accelerated a process where sponsors and rights-holders have been looking at ways of collaborating using other assets. When switching to look at non-cash value there are two broad headings: Value in kind and Marketing in kind.

#### Value in kind

Receiving materials and products, as long as they are budget-relieving because they were needed anyway, is an obvious benefit. The most obvious examples are companies like Nestlé's Pure Life water sponsoring the Virgin London Marathon. In the case of beer obviously supply of product either free of cost or discounted to the organiser is a revenue source for sports clubs, charitable events and functions. The event thus saves on an item that the event would have otherwise have had to purchase from its operating budget. Agreements with clubs and venues for a brewer to have the rights to pour their brands at that location are often offset with branding at the venue. This report shows that the European general public is used to the idea of a beer being marketed and served at a venue such as sports or concert facilities and this adds value to the experience.

Locality is everything in the case study below.

📄 **CASE STUDY**

<b>Brewer</b>	Wells and Young's
<b>Title</b>	Wells Eagle – the Beer of Bedford
<b>When</b>	2010-2011
<b>Where</b>	Bedford, UK

Provided a premium branding to the River Festival.

**What**

Wells Eagle re-launched in 2010 to cement its position as the “beer of Bedford” by supporting community events and local sports teams. It has rebranded the Bedford Blues rugby ground and Bedford Town Football Club, as well as being the principle sponsor of the UK's second largest outdoor festival, the Bedford River Festival.

**Commercial outcome**

- ▶ Helped to rejuvenate Wells Eagle in its heartland with higher awareness and sales and acted as a driver for the parent pub company, Charles Wells Pub Company.

**Community impact**

- ▶ Provided a premium branding to the River Festival and brought cask beer to an outdoor festival.
- ▶ Has helped to drive people to Bedford Rugby home matches and provided extra support for beer sales and promotions in the ground.

📄 **CASE STUDY**

<b>Brewer</b>	Heineken
<b>Event</b>	dance4life
<b>When</b>	Since 2004
<b>Where</b>	Netherlands plus 19 other countries

Building an active youth movement for social change.

**What**

- ▶ Building an active youth movement for social change.
- ▶ Charity started in Netherlands in 2004.
- ▶ Encourages young people (13 -19) to take action to push back HIV and AIDS.
- ▶ Uses dance to inspire and ignite interest, empower and educate, and encourage action to change lifestyles.
- ▶ Has reached almost 500,000 youth in 20 countries.

**Involvement with beer support**

- ▶ Partners who support dance4life gain visibility, so the rights holder would not have any alcohol partners due to the age of the target group.
- ▶ “If an alcohol company wants to fundraise for dance4life, or make a donation without receiving any promotion from dance4life, then we would accept this money. The support or donation would remain anonymous and would not be mentioned in any dance4life communications.”

**Rupert Springfield, *Fund-raising Manager 2009.***

- ▶ However, alcohol brands can promote their support for charity elsewhere, for instance Heineken provided free drinks to the organisers of a major fundraising invitation dinner in Amsterdam for adults only without any credit being given.

The case study below is typical. A brewer in the Netherlands provided drinks free of cost to the organisers of a major fundraising invitation dinner by a charity. The event has a young audience and so branding is inappropriate but Heineken demonstrate solidarity with social issues affecting youth.

### Marketing in kind

Marketing in kind (MIK) takes advantage of the often considerable marketing and communication assets owned by sponsors which can be used to enhance the rights-holder's responsibilities. It feeds into the whole new idea of sponsorship, which is about being a platform, about engaging the consumer, and enriching the experience that the sponsor's customers can have.

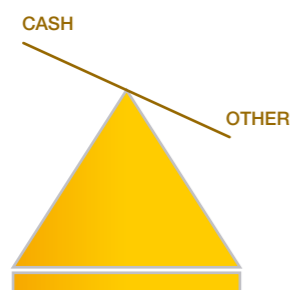
Sponsors will enter a sponsorship because it delivers them something they can then offer to their employees, customers or would-be customers.

➤ Fig. 10

➤ Fig. 10 / A new balance

#### CASH

Scheduled payments  
Performance bonuses



#### OTHER

##### Value in kind

- ▶ Personnel
- ▶ Technology
- ▶ Administrative resources
- ▶ Materials provision
- ▶ Specialist skills/expertise

##### Marketing kind

- ▶ Database
- ▶ Communications
- ▶ Introductions
- ▶ Brand enhancement

##### Enhanced visitor experience

### CASE STUDY

<b>Brewer</b>	Plzenský Prazdroj, a. s.
<b>Title</b>	Social investment programme <b>PRAZDROJ LIDEM</b>
<b>When</b>	2002-2010
<b>Where</b>	Czech Republic

### Funding 274 regional projects of local NGOs.

#### What

PRAZDROJ LIDEM (Prazdroj to the People) is a social investment programme established in 2002. Its main objective is to help improve the quality of life in the regions where the company operates (Pilsen and Moravia).

Together with the regions' representatives and with the engagement of the general public, employees and regional opinion makers, the company supports the activities of non-profit organisations. Citizens and the company's employees participate in the decision-making by voting which projects should be supported. Furthermore, thanks to their nomination in the programme, the participating organisations receive additional financial fund via donor's text messages and are given the opportunity to present themselves in the media. PRAZDROJ LIDEM focuses in particular on investing in education, enhancing citizens' leisure time activities, improving health and social welfare, protecting cultural heritage. Over the previous nine years, the programme saw the distribution of over 60 million Czech Crowns among 274 projects.

#### Commercial outcome

- ▶ Positive company reputation built.
- ▶ Prazdroj promoted as responsible company.

#### Community impact

- ▶ Supporting 274 regional projects of local NGOs.
- ▶ Helping to develop community and improve life in regions the company operates in.
- ▶ Helping to raise additional financial grants (via donors text messages).
- ▶ Increasing publicity of the NGO's activities and awareness of the projects among public by engaging multiple stakeholders selecting projects the regions consider important.

This action in the Czech Republic has direct and measurable beneficial impacts.

## CASE STUDY

**Brewer** Birell

**Title** Non-alcoholic Birell helps to stop fall in blood donors

**When** 2010

**Where** Czech Republic

### Increasing the numbers of blood donors.

#### What

In the past few years the number of people voluntarily donating blood has been decreasing in the Czech Republic. Plzensky Prazdroj's project has helped to stop this trend, yet there are still some 128,000 non-remunerated blood donors lacking in the country.

The second year of 'Become a Blood Donor!' nationwide campaign focused on raising awareness, calling for new donors to join the initiative and preventing this negative trend.

Birell brand promoted blood donations by using communication tools that the transfusion centres themselves do not have, launched a special website related to this issue, and developed a special campaign on Facebook with some 60,000 supporters. Besides, the brand provided 50,000 thousand cans of Birell as a part of a small snack package given to each donor when donating 450ml of blood.

#### Commercial outcome

- ▶ Positive brand perception enhanced (as a brand which is helping to solve blood donation).

#### Community impact

- ▶ The issue of critical lack of blood in Czech hospitals and decreasing number of new blood donors brought to public attention.
- ▶ Number of donors increased. (14 % year on year increase)

## Beer company support

### → Economic rationale for community involvement

The challenge for beer marketers is in overcoming fierce brand loyalty to move consumers to switch brands. Switching brand preference in the beer market is one of the hardest challenges in marketing of any consumer product as people have strong feelings and loyalties to individual beers. However it is precisely this loyalty that makes brand switching so valuable. This report goes on to show that the public are generally not influenced by sponsorship to start drinking if they do not already, but that they might consider changing brands due to loyalty and a link to the sponsor. Sampling is a big benefit that sponsorship can offer by physically getting the product in people's hands. This is by no means always done at events however, in fact in Scotland for example where beer companies are major soccer sponsors they have signage but no product is sold in the stadia whatsoever.

### → Non-economic rationale for community involvement

There has been a long tradition of brewing and community involvement and in an extreme form that spirit still exists in the non-profit, charitable work of the Trappist tradition. Drinking beer is a social activity and marks many festivals and important traditions in the life of communities.

In modern times a major driver for the bigger brewers are their own CSR (corporate social responsibility) programmes and many large brewers such as Tuborg in Denmark and Kronenbourg in France have their own foundations.

The following case studies from Denmark illustrate the diverse range of help given to Danish society by the Foundation of a major brewer.

## CASE STUDY

**Supporter** Tuborg Foundation

**Title** European Year of Volunteering

**When** 2010

**Where** Denmark

The foundation has granted approximately €120 million in current value for non-profit purposes.

### What

€600,000 was given to Denmark's Idræts Forbund (The Danish Sports Association) for a university research project investigating the conditions for volunteering and starting projects to ensure that in 25 years Denmark will still have sports clubs driven on a voluntary basis.

### Commercial outcome

- ▶ Goodwill.

### Community impact

- ▶ The foundation was founded in 1931 and since then has granted approximately €120 million in current value for non-profit purposes. The funds are dividends from brewery shares and 2010 was granted more than €3.3 million for approx. 700 large and small projects. Most of the funds are granted to societies and clubs and are typically in the range of €3-6,000 each.

## CASE STUDY

**Supporter** Tuborg Foundation

**Title** Research: What Shall Denmark Live On In The Future?

**When** Since 2006

**Where** Denmark

Long term strength of Denmark.

### What

€4 million to fund four research projects in Danish universities and business schools looking at the future demand for skilled labour in Denmark, the influence from internationalisation and globalisation on occupation, salaries and working conditions in Denmark, competitive power in the Danish experience economy and Denmark's export abilities and potential.

### Commercial outcome

- ▶ Long term strength of Denmark.

### Community impact

- ▶ Funding for academia and long term economic wellbeing of Denmark.

For the smaller brewers their sales area is often quite limited and they need high penetration and acceptance on that terrain. In addition many of their employees live nearby and have a personal investment in the community.

## CASE STUDY

**Supporter** Tuborg Foundation

**Title** Ferris wheel at Denmark's largest rock festival to drive environmental awareness

**When** Since 2006

**Where** Denmark

### Generating awareness of energy efficiency.

#### What

To make young people more interested in the environment, the Tuborg Foundation placed a Ferris wheel at Denmark's largest rock festival. To get a free tour on the wheel people had to ride a bicycle for 15 minutes to generate electricity. More than 17,000 made use of the opportunity. The same bicycle concept was used the next year to heat up and clean a swimming pool.

#### Commercial outcome

- ▶ Link with environmental responsibly.

#### Community impact

- ▶ Awareness of energy efficiency.
- ▶ Pleasure while learning valuable lessons.

## CASE STUDY

**Brewer** Ringwood

**Title** "Salisbury Live" part of Salisbury International Arts Festival

**When** 20th to 22nd May 2011 and 2012

**Where** Salisbury, England

### Extending the boundaries of the brewery's heartland.

#### What

Sponsored by Ringwood Brewery, Salisbury Live is a free music event taking place in pubs in and around Salisbury town centre. Ringwood Brewery is running an Ale Trail in Salisbury which will coincide with the event.

**Sponsorship** £3,500

#### Commercial outcome

- ▶ Helps publicise Ringwood Brewery.
- ▶ Extending the boundaries of the brewery's heartland.
- ▶ Take on new stockists of Ringwood beer.

#### Community impact

- ▶ Builds loyalty and goodwill towards Ringwood Brewery in Salisbury/Wiltshire.



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## Summary of Theory of Community Involvement and Support

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*Consumers across Europe are increasingly aware of marketing techniques and are indifferent and even sometimes cynical towards direct classical advertising. This has prompted brands to find new ways to establish connections with their consumers engaging them at the heart of what they really are passionate about, be this sports, arts, education, social issues or their local community. This new reality plays well to a long established tradition of beer being a major part of the life and activities in local communities.*

*In the beer sector, building brand attributes and loyalty is the key for the marketing departments of breweries and large and small breweries work hard to gain respect at a community level. This job is performed in part by funding a huge variety of sports, cultural activities, charities, festivals - and being seen to have made a genuine difference.*



# Part Two

## Impact of Brewers' Involvement and Support for the Community

### Key research findings

#### → Industry survey methodology

For the first time ever a list has been made of the many activities and events supported by brewers in order to demonstrate and quantify the contribution brewers across Europe make to the well-being, culture, leisure time and knowledge of EU citizens. The collection of data was made from brewers and "rights-owners" (organisers of events that have received support or sponsorship from breweries). This was compiled using an online survey open to both brewers and rights-holders during late January and early February 2011, together with desk research, the membership of The European Sponsorship Association and many other associations concerned with funding for arts, sports and other activities, plus database sources such as The World Sponsorship Monitor. This is referred to in this report as the 'industry survey'.

At the same time 3054 members of the general public were surveyed online with nationally representative panels of approximately 510 in the UK, Germany, Spain, Italy, Denmark and Poland. These countries were felt to be representative of Europe as a whole. Of those people, 78% were beer drinkers, the highest proportion being the 35-44 age group. Overall, men were the more likely to be beer drinkers at 54.5%, against women at 45.5%. This survey is referred to in the report as the 'general public survey'.

Brewers and rights-holders around Europe were invited by The Brewers of Europe, national brewing associations and by The European Sponsorship Association to detail their current sponsorships and community support projects. As the information was supplied on a confidential basis, and as individual brewer's information was aggregated into the whole, the brewers were able to give more assistance than is normally the case with this highly market sensitive information. In all, 8,182 separate support projects and sponsorships were collected and analysed for this study. Where information was not available, extrapolations were made for each individual country based on the national market share of those brewers who did supply information. Information was received from 24 countries as well as pan-European campaigns (International).

Sponsorship and community support is never as easy to measure and evaluate as advertising, which is a straight commercial payment for space or airtime, but as far as is known no such level of detail has ever been attempted before. With such a large sample it is possible to analyse in more depth than ever before the scope of sponsorship and community support by brewers across Europe.

In Part Three: Evaluating the Economic Impact of Brewer's Community Involvement, the research data is used to calculate the total amounts of money spent in Europe on community support, while in this section an assessment is made of the activities composing the various community supports and sponsorships.

## What types of activities are supported by brewers?

Looking across the responses from the 24 countries as a whole it can be seen that support to cities and communities outstrips even sport, and by quite some margin. The term City/Community is used to apply to a range of activities, but largely covers festivals of all types including food festivals, city celebrations, and venues. It should also be noted that, whilst the table is a representative sample of the distribution of support amongst different activities there will be thousands of other activities that are not catalogued here.

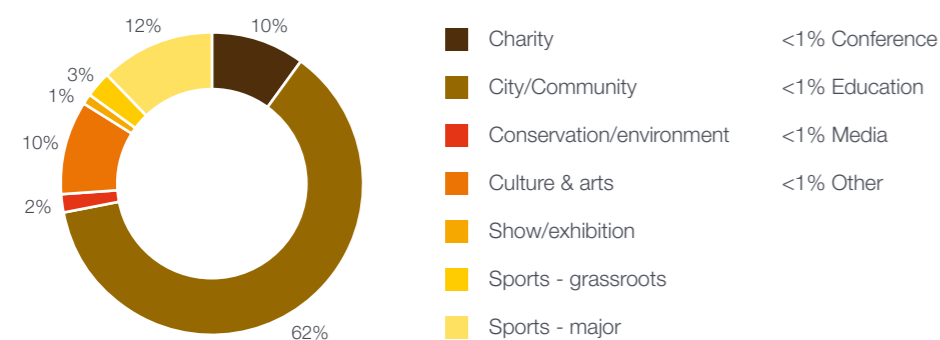
These broad activities can be further analysed to reveal the very wide spread of areas where brewers have chosen to invest community support or sponsorship.

› Table / Proportion of Support by Activity - number of events

Charity	781
City/Community	5,062
Conference	4
Conservation/environment	166
Culture and arts	800
Education	8
Media	12
Other	11
Show/exhibition	83
Sports - grassroots	285
Sports - major	970
<b>Total</b>	<b>8,182</b>

› Fig. 11

› Fig. 11 / Breakdown number of activities



› Table / Breakdown of activities

<b>Charity</b>	<b>781</b>
Charity	780
Sport - undefined	1
<b>City/Community</b>	<b>5,062</b>
City/Community	621
Festivals	4431
Food Festival	7
Venues	3
<b>Conference</b>	<b>4</b>
Conference	4
<b>Conservation/environment</b>	<b>166</b>
Charity	1
Conservation/environment	165
<b>Culture and arts</b>	<b>800</b>
Arts Festival/Exhibitions	201
Culture	131
Fashion Shows	1
Festivals	7
Film Festival/Exhibitions	12
Food Festival	4
Jazz Music	1
Media	8
Museums	3
Music Festival	77
Other	343
Pop/Rock Music	1
Show/exhibition	1
Theatre	2
Venues	8
<b>Education</b>	<b>8</b>
Education	8
Media	12
Broadcast Sponsorship: Light Entertainment	3
Broadcast Sponsorship: Sports Programmes	8
<b>Media</b>	<b>1</b>
Other	11
Charity	1
<b>Other</b>	<b>8</b>
Venues	2
<b>Show/exhibition</b>	<b>83</b>
Show/exhibition	83

<b>Sports - grassroots</b>	<b>285</b>
Athletics	5
Equestrian	1
Extreme sports	1
Fishing	2
Golf	24
Handball	1
Hockey [Ice]	4
Horse Racing	1
Other sport	8
Rallying	1
Sailing/Yachting	5
Soccer	21
Sport	1
Sport - undefined	202
Surfing/windsurfing	7
Volleyball	1
<b>Sports - major</b>	<b>970</b>
Athletics	1
Basketball	9
Cricket	14
Cycling	2
Equestrian	1
Golf	6
Handball	2
Hockey [Ice]	8
Horse Racing	7
Hurling	1
Motorcycle Racing	1
Motorsport - Formula 1	1
Motorsport - other	1
Olympics	2
Rugby League	4
Rugby Union	26
Sailing/Yachting	2
Skiing/Snowboarding	4
Snooker/Pool	1
Soccer	407
Sport - undefined	458
Tennis	4
Venues	5
Volleyball	1
Waterpolo	2
<b>Total</b>	<b>8,182</b>

## Outcomes of brewery support as reported by brewers, recipients of support and the general public

› Table / Split of Local, Regional, National and International Activity - number of events

Nearly half of the sponsorships and support covered in this report were at a regional level, the next group being local (defined as being small community level). 84.2% were either regional or local.

Regional	3,919
Local	2,973
National	1,269
International	21
<b>Grand Total</b>	<b>8,182</b>

› Fig. 12

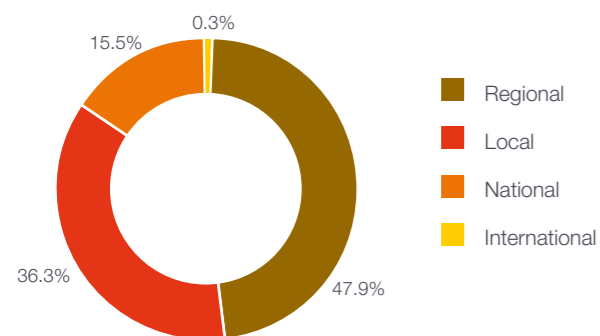
While collecting this information about brewery supported activities further qualitative questions were asked in some depth to a group of brewers and the recipients of sponsorship or community support about the results of brewer support in individual cases.

The industry survey was conducted online in January and February 2011 and was composed of 65% breweries and 35% rights-holders. Of the brewers surveyed 51% were large, 36% medium and 13% were small. The questions mirrored many in the general public survey but the longer questionnaire length allowed an extra layer of analysis to complement the general public survey. There was detailed analysis of a range of events surveyed in 19 countries: Austria, Belgium Bulgaria, Czech Republic, Denmark, France, Germany, Hungary, Ireland, Italy, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain and UK.

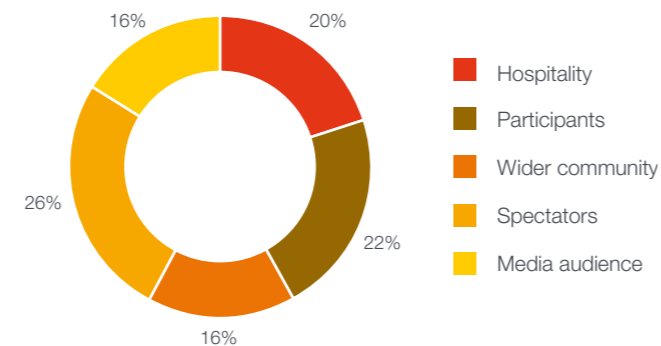
The collection of data on sponsorship and support around Europe provided a number of additional insights as the respondents were asked to go into quite some detail about the outcomes of each sponsorship or supported activity that they had reported.

Looking at up to the first ten of the events described by the respondents and grouping them together across Europe allowed the following conclusions about the outcomes of brewery support to be drawn.

› Fig. 12 / Type of activity



› Fig. 13 / Who are the main beneficiaries of the support?



› Source: industry survey 2011

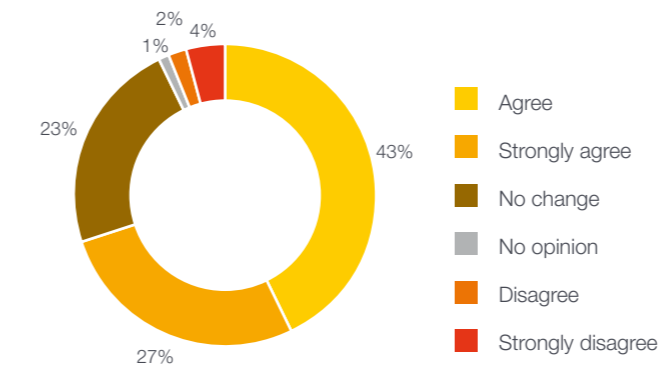
### › Spectators and participants benefit most and beer support enhances the quality of the event

In the opinion of the analysed events, spectators and participants were considered the groups to benefit most widely from the beer support which helps the events to occur.

› Fig. 13

70% of the brewers and rights holders agreed that beer support or sponsorship was necessary for the event to take place, with 23% believing there would have been no change without brewery support.

› Fig. 14 / Beer support allowing the event to take place



› Source: industry survey 2011

› Fig. 14

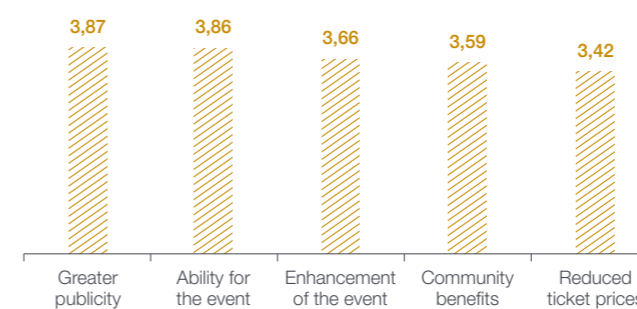
In addition to the event being able to take place, just over a third (36%) of respondents felt that commercial support from brewers helps to keep ticket prices down. The general public too appreciate support equally for its ability to publicise events and to help them take place. When asked to rank from 1 - 5 the benefits that sponsorship can bring it is interesting that the ability of a sponsor to help spread the word about an event is highly valued, in fact as much as being the means for the event to occur at all.

› Fig. 15

95% of the responses in the industry survey stated that sponsorship adds to the quality of an event.

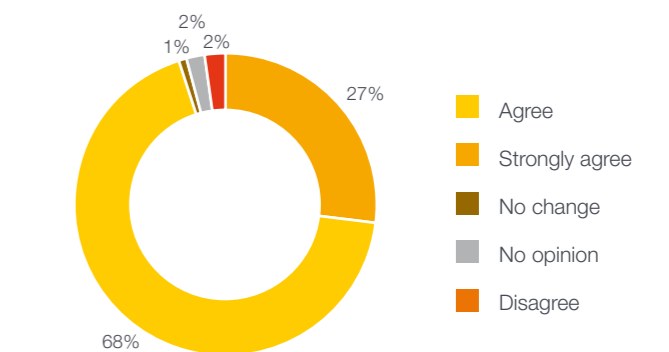
› Fig. 16

› Fig. 15 / To what extent do you agree that the following outcomes can result from sponsorship? (1-5 scale)



› Source: general public survey 2011

› Fig. 16 / Enhancement of the event



› Source: industry survey 2011

When asking just the rights holders alone and isolating the brewers' responses there is still an 86% agreement that beer support leads to an enhancement of the event.

› Fig. 17

That proposition was less widely supported amongst the general public with over a third not taking an opinion but still 42% feeling that commercially supported events are made more enjoyable.

› Fig. 18

When asked specifically about whether monies provided by beer brands are needed to maintain the quality of the activity there was agreement that beer support does

maintain quality, especially from respondents in Spain and Poland. Only 13% of non-beer drinkers disagreed, as opposed to 34.8% of them who agreed.

› Fig. 19

Beer drinkers feel that sponsorship contributes to the development of both sports and arts events. When contrasting those in the survey that were beer drinkers against those who were not we see a slightly higher acceptance of this proposition amongst beer drinkers.

› Fig. 20 › Fig. 21

There is a higher propensity to believe that sponsorship contributes to the development of sports (66%) than in

arts (60%) as shown in Fig. 20.

› Fig. 22

The feeling that support and sponsorship improve the quality of the experience at events is backed by the nomination by the general public of the activities and events they deem appropriate for beer support. On a 1 - 5 scale, and comparing the appropriateness of supporting sports with other activities, it is significant that it was felt that for a beer brand to be supporting a venue is the most appropriate of all. There is perhaps a feeling that consumption of beer in a sports hall or a cultural centre is a natural association. The wisdom brewers wish to be seen to be local and to build links with the local community is confirmed by this finding which was backed up by a following question where 47% of respondents agreed that it was appropriate.

→ There are community benefits from beer support

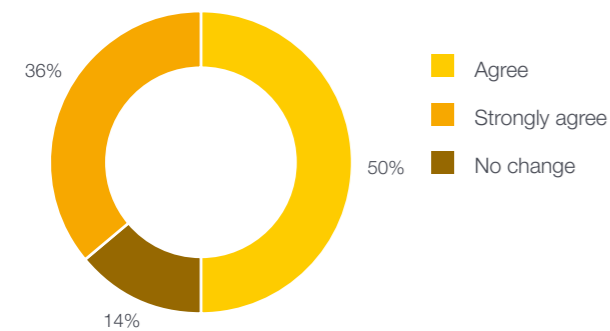
60% of the industry felt that beer support represented a benefit for the community with just over a quarter believing there was no effect on the community.

› Fig. 23

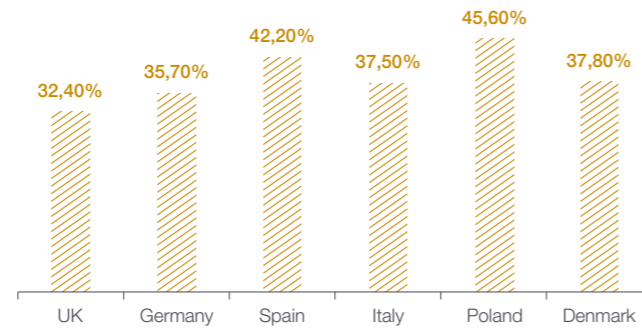
When looking at the events alone, slightly fewer, but still the majority thought that the community benefited.

› Fig. 24

› Fig. 17 / Beer support enhances events - rights holders opinion

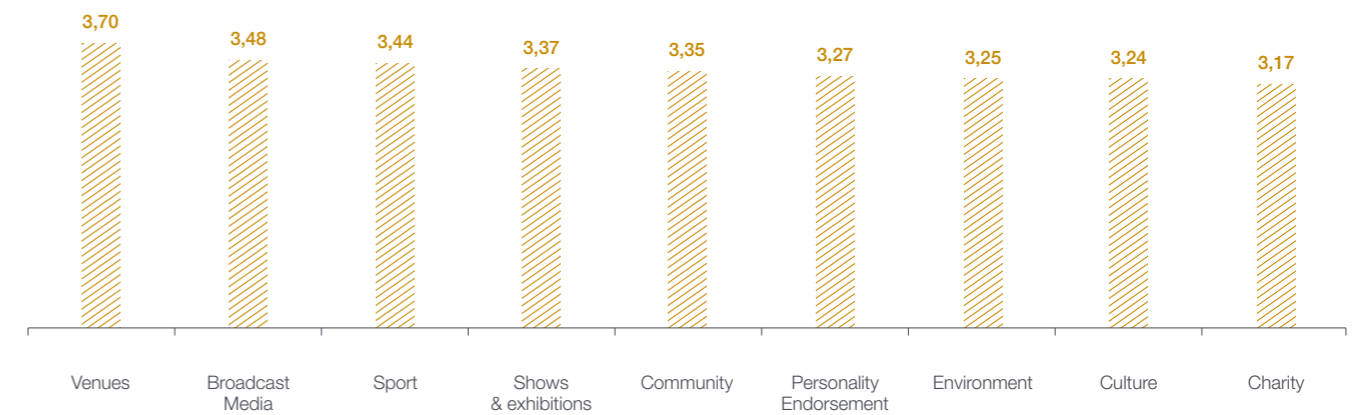


› Fig. 19 / Monies provided by beer brands are needed to maintain the quality of the activity



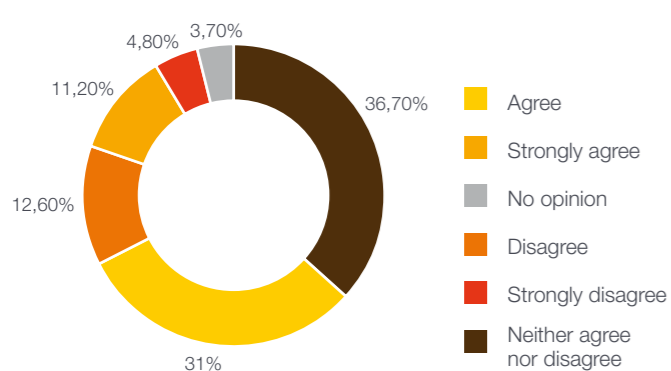
› Source: general public survey 2011

› Fig. 22 / How appropriate do you think it is for beer brands to sponsor each of the following? (1 to 5 scale)



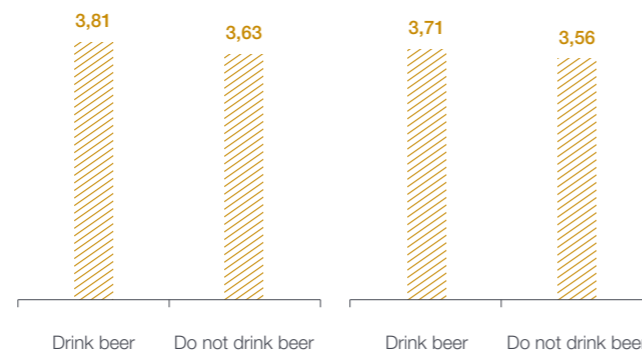
› Source: general public survey 2011

› Fig. 18 / Sponsors help to make events more enjoyable



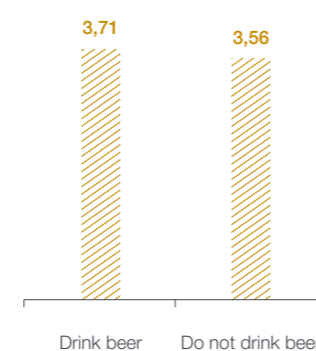
› Source: general public survey 2011

› Fig. 20 / Sponsorship contributes to the development of sports events (mean score 1-5)

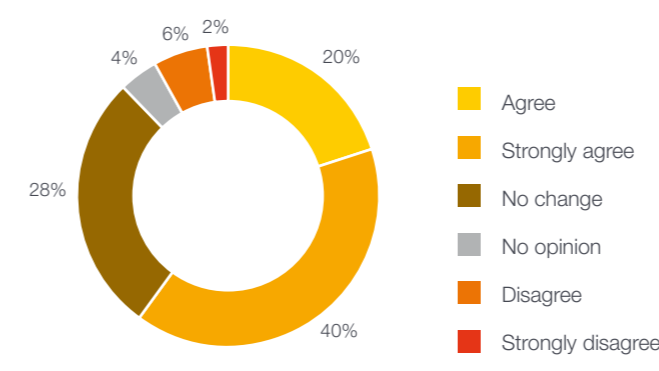


› Source: general public survey 2011

› Fig. 21 / Sponsorship contributes to the development of arts events (mean score 1-5)

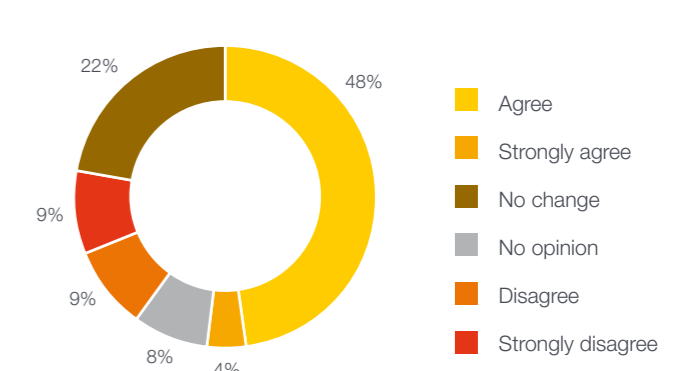


› Fig. 23 / Community benefits - rights holder opinions



› Source: industry survey 2011

› Fig. 24 / Community benefits - rights holders opinions



42.4% of respondents in the general public survey felt that community is an appropriate area for beer brands to support and sponsor but there was still almost 40% who were undecided with under 14% actively disagreeing with the notion.

› Fig. 25

There is a clear difference on the acceptance of the appropriateness of involvement with communities between the extremes of the UK and Poland.

› Fig. 26

→ Beer sponsors should fund local communities

At 52.2% there was majority agreement that beer sponsors should fund local communities, but just over a third was not moved in any one direction by the idea.

› Fig. 27

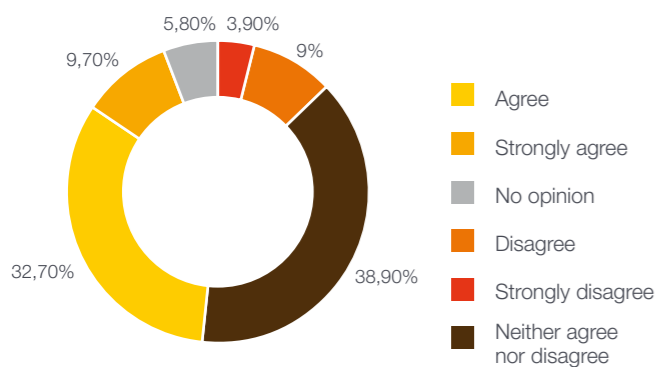
There was an even spread of opinion on this throughout Europe with the Poles showing the highest agreement at 44%. Non-beer drinkers were 7% less concerned than beer drinkers at 31.2%.

→ Beer support allows greater publicity for events

The finding that 86% of the events believed that greater publicity is an important reward for support by brewers is echoed in the finding of the public survey which ranked it the second highest benefit.

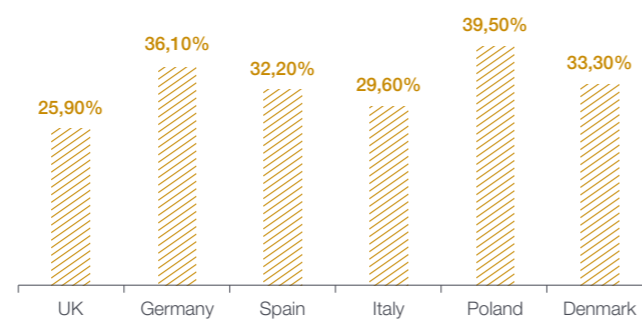
› Fig. 28

› Fig. 25 / Community activities are appropriate opportunities for beer brands to be involved



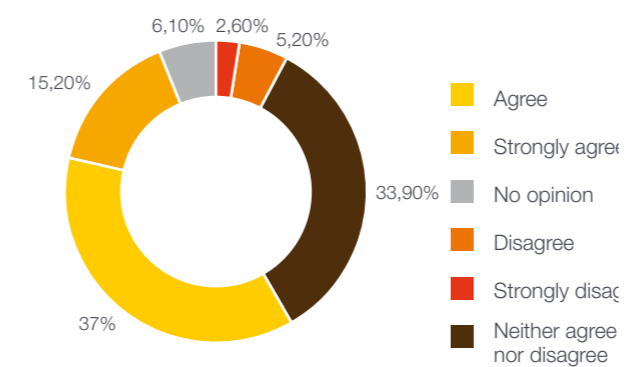
› Source: general public survey 2011

› Fig. 26 / Community activities are appropriate opportunities for beer brands to be involved



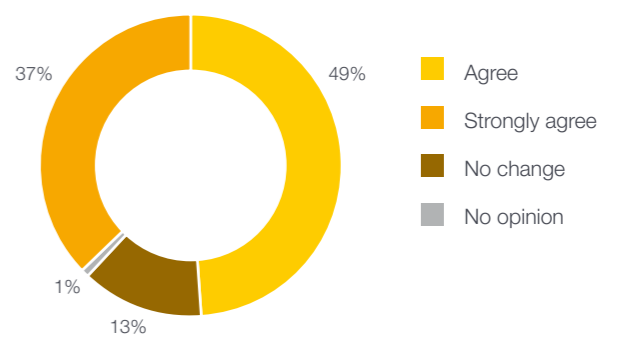
› Source: general public survey 2011

› Fig. 27 / It is very important that beer brand sponsors also put funding into local communities



› Source: general public survey 2011

› Fig. 28 / Greater publicity



› Source: industry survey 2011

It is not just events that benefit from the communications reach made possible by linking with a brewery as this case study shows.

**CASE STUDY** 

<b>Brewer</b>	Plzenský Prazdroj, a. s.
<b>Title</b>	Promile INFO service
<b>When</b>	2007 - 2010
<b>Where</b>	Czech Republic

The service calculates current blood alcohol level and also the time when it is safe to drive.

**What**

Everyone knows that you cannot drive after drinking alcohol. But for how long is it safe to get behind the wheel the morning after a party? How long does alcohol stay in your body? These answers can be obtained through one simple SMS provided by Promile INFO, a service of NGO SANANIM supported by Prazdroj since 2007. Based on the input data sent via a text message, filled in via the WAP interface or entered into a new application, the service calculates current blood alcohol level and also the time when it is safe to drive. In order to receive the information, the user needs to enter his or her weight and sex followed by the amount, type and time of the alcohol consumed. The reading is an estimate and users are informed about this. The service provides general, mean data based on a scientific formula of the Widmark's curve (which allows to calculate the expected time of elimination of ethanol from the human body), while the true level may only be defined through a blood test or with the use of a reliable breath analyser.

**Commercial outcome**

- ▶ Positive company perception as responsible producer enhanced.

**Community impact**

- ▶ The issue of drinking and driving brought to public attention (Enlarged the number of knowledgeable people through special education on festivals and other big events and through communication on promotional materials, internet websites and in the media).
- ▶ Use of the service increased.
- ▶ New ways of use - upgraded by a new JAVA application.

→ Hospitality is a valued benefit on site for events

69% believed that the hospitality facilities had been increased with brewery support or sponsorship.

› Fig. 29

→ The ability to sample is a benefit

Exactly half of the events and brewers thought that sampling of brewer's products on site was an advantage. The event gains an asset in terms of a welcome facility on site and consumers gain from a bonus should they wish to drink beer on site while the brewers can attempt to build brand loyalty or even brand switching in a convivial and relaxed setting.

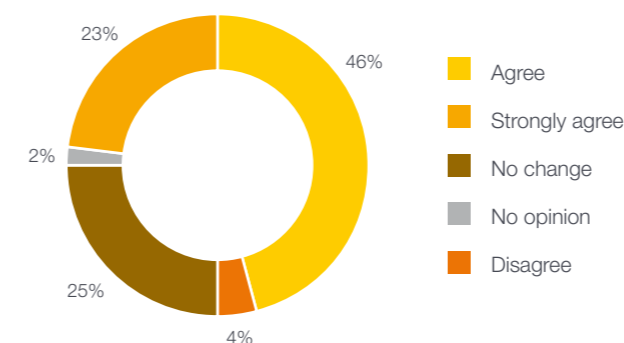
› Fig. 30

→ Very few alcohol related problems reported by brewers and events

Only 5% of the industry survey believed that they had experienced problems from the support with 68% claiming not to have had problems.

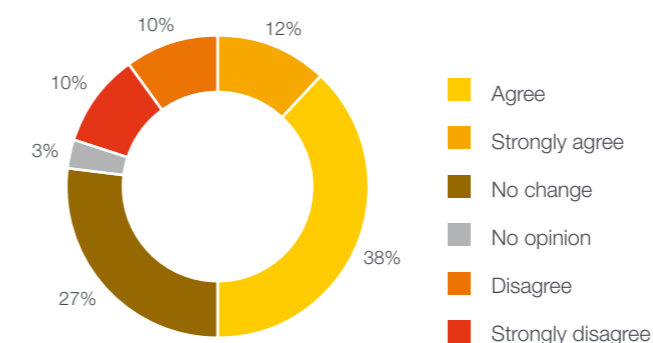
› Fig. 31

› Fig. 29 / Hospitality is a benefit



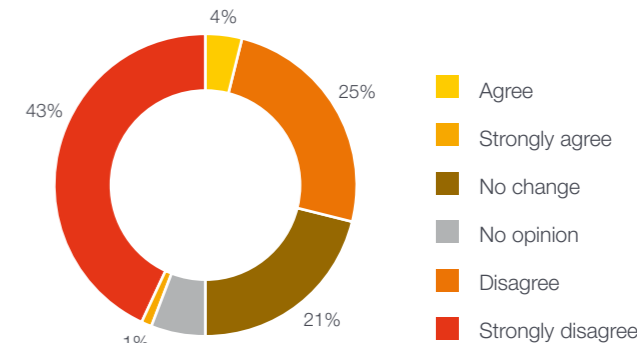
› Source: industry survey 2011

› Fig. 30 / Sampling on site an advantage



› Source: industry survey 2011

› Fig. 31 / Alcohol related problems resulting from the support of the activity from the brewery?



› Source: industry survey 2011

This finding echoes a case study from the 2008 UEFA European Championships.

**CASE STUDY** 

<b>Brewer</b>	Carlsberg
<b>Title</b>	EURO 2008
<b>When</b>	2008
<b>Where</b>	Austria and Switzerland

UEFA reported good fan behaviour at most matches and virtually no incidents of crowd disorder or obsessive drinking.

**Commercial outcome**

- ▶ Sales.

**Community impact**

- ▶ 1.3 m were in the stadia and 5.2 m people visited the fan parks.
- ▶ Live attendance was predominantly over 18 years old.
- ▶ Only non-alcoholic beer provided in stadia, and also made available in all fan parks, being sold by concessionaires (not Carlsberg).
- ▶ Promotion of "Carlsberg supports fair play on and off the pitch, 'Please drink responsibly' within stadia, on fan park cups etc.
- ▶ UEFA reported good fan behaviour at most matches and virtually no incidents of crowd disorder or obsessive drinking.

→ **Beer is considered by the general public to be an appropriate sponsor category**

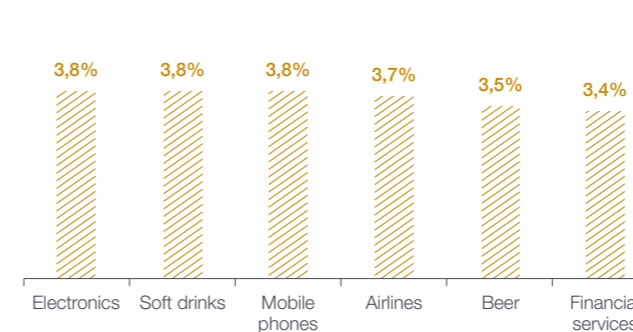
Amongst the general public beer is considered to be in line with other sectors as an appropriate sponsor category. Respondents were asked to rate on a 1-5 scale "How appropriate do you think the following brand sectors are as sponsors?" There were no huge difference across the six European countries, but beer was seen as being very slightly less appropriate when compared to other categories.

› Fig. 32

When looking at beer specifically, the overwhelming statement was that it is an appropriate sector, but with almost as many not having a strong opinion either way.

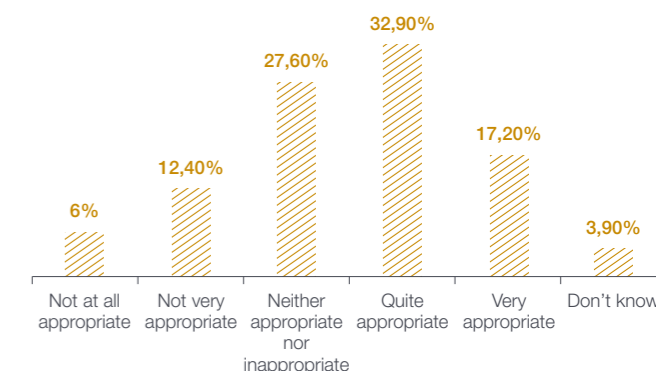
› Fig. 33

› Fig. 32 / How appropriate do you think the following brand sectors are as sponsors? (1-5 scale)



› Source: general public survey 2011

› Fig. 33 / How appropriate do you think beer is as a sponsor?



› Source: general public survey 2011



The question of acceptance of beer support is revealing. When asked "How appropriate do you think it is for beer brands to sponsor sport?", total negative statements were 21% across the six countries with a 52% total positive.

› Fig. 34

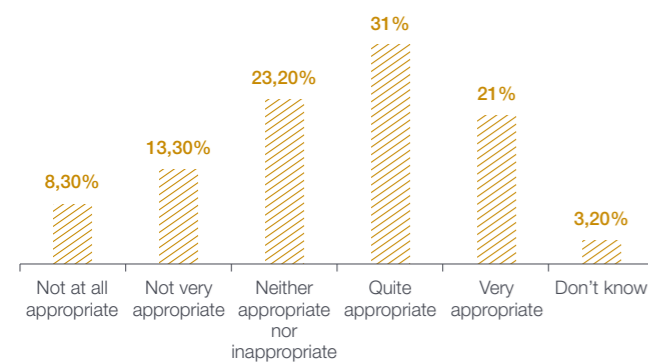
→ **Not many concerns reported from brewers or events about beer support**

12% in total of the industry survey reported concerns with 60% disagreeing that there had been any concerns and 22% not being affected by the issue either way.

As 73% of the events surveyed claimed that responsible drinking messages featured in the activity there may be an acceptance that beer consumed on site should be drunk in a responsible manner.

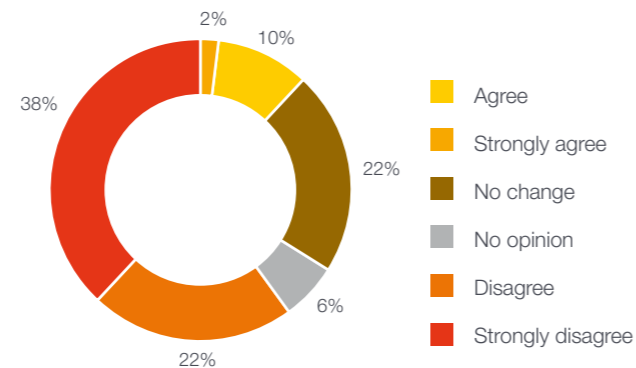
› Fig. 35

› Fig. 34 / How appropriate do you think it is for beer brands to sponsor sport:



› Source: general public survey 2011

› Fig. 35 / Concerns about support from a brewery?



› Source: industry survey 2011

The following case studies highlight the stance of two international sports federations.

**CASE STUDY** 

<b>Brewer</b>	<b>Krombacher</b>
<b>Sport</b>	<b>FISA - Fédération Internationale des Sociétés d'Aviron</b>

Traditional, with values of team spirit, respect, commitment, integrity.

**Background**

- ▶ International rights holder for all world rowing.
- ▶ Membership by national associations.
- ▶ 65% male / 35% female with 80% over 16.
- ▶ Over 50% are professionals or key-decision makers
- ▶ Traditional, with values of team spirit, respect, commitment, integrity.

**Attitude to Alcohol Sponsorship**

- ▶ Would take an alcohol sponsor if below 14% alcohol by volume (ABV).
- ▶ Krombacher brewery was sponsor of Rowing World Cup in 1998.
- ▶ Would not allow alcohol sponsorship of youth regattas.

"As an outdoor sport with its accompanying water-side hospitality facilities, FISA acknowledges that drinking – provided it is conducted in a responsible manner - is very much part of the leisure/pleasure ambience at an international regatta."

**Andrew Couper**, Marketing Director 2009

The sport of basketball had a slightly different perspective to that of rowing.

**CASE STUDY** 

<b>Brewer</b>	San Miguel
<b>Event</b>	FIBA – Federation Internationale de Basketball

Second most popular team sport with 450m followers.

**Background**

- ▶ International world rights holder for amateur basketball.
- ▶ Second most popular team sport with 450m followers.
- ▶ Younger audience than average population around 70% male, with higher than average disposable income and levels of education.
- ▶ “Cool” image, with few image problems of poor behaviour etc.

**Attitude to Alcohol Sponsorship**

- ▶ Would take an alcohol sponsor, but not a hard liquor brand.
- ▶ Had San Miguel as sponsors for Eurobasket in Spain in 2007, but due to national laws, sponsoring brand was alcohol-free beer.
- ▶ Would not allow any beer sponsorship of youth events.

“We believe that beer can be a part of a fan’s enjoyment of a game at the arena or on TV and therefore we are comfortable being associated with a beer brand as a FIBA sponsor. We also believe very strongly in responsible drinking and recognise we have a role in encouraging this.”

**Matthew Osman**, Commercial Director 2009

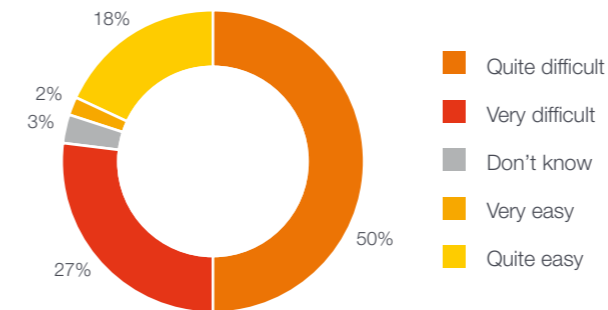
→ **Is beer support replaceable while still maintaining a similar outcome for the activity?**

77% of the events under study reported that finding a non-beer sponsor or supporter to replace the current supporters would be difficult.

› Fig. 36

Only 11% of the general public thought it would be easy to replace beer support, with beer drinkers feeling more strongly, and both groups in agreement with the statement.

› Fig. 36 / Ease of replacement by a non-beer sponsor



› Source: industry survey 2011

50% of the public felt that finding replacement sponsors would be hard.

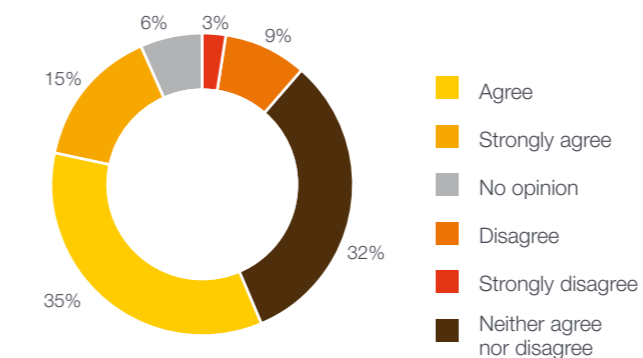
› Fig. 37

→ **Damage would be felt without beer sponsorship or promotion**

78% of the industry survey of brewers and events claimed that some form of damage would occur without beer support.

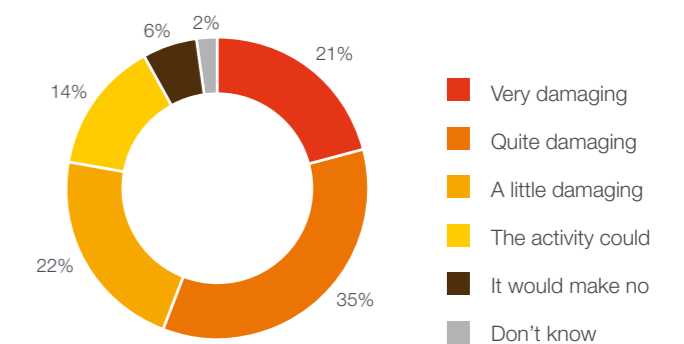
› Fig. 38

› Fig. 37 / Without beer brand support it would be difficult for some activities to get replacement sponsors



› Source: general public survey 2011

› Fig. 38 / How damaging would it be if the beer support or promotion ceased to exist?



› Source: industry survey 2011

The following case studies emphasise responsible drinking being built into the partnership.

## CASE STUDY

**Brewer** Tennent's

**Event** T in the Park

**When** Since 1994

**Where** Scotland

180 artists performing on  
11 stages over 3 days.

- ▶ In 1994 leading promoters DF Concerts teamed up with InBev brand Tennent's Lager as "founding partner" to create a new live pop music festival.
- ▶ In its 16th year, with 180 artists performing on 11 stages over 3 days.
- ▶ Over 85,000 music fans from all over world daily, mostly aged over 18.
- ▶ Generates c. £21million for the Scottish economy.

### Involvement with beer support

- ▶ Responsible drinking messages fully promoted, with 50% of advertising space given to The Drinkaware Trust to raise consumer awareness.
- ▶ 500 bar staff specifically trained by Servewise.
- ▶ July 2007 consumer tracking scores of 18-24's showed:
  - 93% spontaneous awareness of T in the Park.
  - 97% know that Tennent's Lager is the sponsor of T in the Park.
- ▶ T in the Park is the largest carbon neutral festival in the world and in addition to posting responsible alcohol messages, it also promotes healthy eating and drugs education.

"T in the Park is now one of the most successful festivals in Europe. It has developed into one of Scotland's most prominent cultural gatherings, and provides the perfect opportunity to nurture home-grown talent."

**Alex Salmond**, *First Minister of Scotland*

## CASE STUDY

**Brewer** Carlsberg and Becks Alcohol Free

**Event** THINK! Drink Drive campaign by UK government for Social Marketing

Reaching over 2 million  
football fans.

### Background

- ▶ Title sponsorship of the Think! British Superbikes Championships.
- ▶ Previous sponsors of the Football League and the Great Britain Rugby League teams, using THINK! Road Safety message.

### Involvement with beer support

- ▶ Joint Government Campaigns with Alcohol brands.
- ▶ With Carlsberg:
  - COI production of 3 posters with messages such as "We want you here, not down the nick" linked to Carlsberg football sponsorship.
  - Placed in football stadiums and printed in match day programmes.
  - Reach over 2 million football fans.
- ▶ With InBev:
  - Becks Alcohol Free beer support of the THINK! campaign.

This example shows sponsorship by a government to promote a driving safety campaign, which has been linked into joint promotions with breweries in order to promote the national responsible drinking campaigns at sporting events.

Brewers do support outreach to young people under the legal purchasing age but only under very controlled self-imposed conditions and the requirements and policies of the organisation they are supporting as these case studies show.

## CASE STUDY

**Brewer** Shepherd Neame

**Title** Kent Safe Schools Alcohol Awareness Drama Competition

**When** Tuesday 8 March 2011

**Where** Sevenoaks, Kent, UK

Providing cash prizes for the development of school drama departments.

### What

Kent brewer Shepherd Neame has been the principal sponsor of the Kent Peer Education Drama Competition for four years, providing cash prizes for the development of school drama departments.

Visitor Centre Manager, Graham Hukins, and Assistant Manager, Laura Salway assisted in running and judging the competition.

Helping to short list finalists by reviewing Kent schools through watching DVD performances. Finals were staged at the Stag Theatre, Sevenoaks; Laura Salway was one of the back stage team liaising with the students and teachers, assisting with rehearsals and production as well as giving tips to the students on their performances. Graham Hukins was on the panel of expert judges.

### Commercial outcome

- ▶ The event features no Shepherd Neame branding, nor does the company actively seek any publicity over its support of the competition.

### Community impact

- ▶ The competition increases awareness of the issues surrounding alcohol and lets young people discuss various consequences and ideas in a safe and constructive environment.
- ▶ Showcasing the benefits of moderate alcohol consumption and the dangers of excessive drinking, which can then be used as teaching tools by Kent County Councils Schools Education Advisors.
- ▶ As the students have to write their drama piece themselves they have to thoroughly research alcohol and its role in society. This research coincides with what they are learning in their PSHE and citizenship lessons and acting it out helps them to bring to life their research.
- ▶ The students also get to partake in a proper theatre production, whilst highlighting their acting and drama abilities, in particular their public-speaking abilities.
- ▶ The winners of the competition are invited to Shepherd Neame for a Brewery Tour and to have a responsible drinking presentation.

## CASE STUDY

**Brewer** JW Lees, Daniel Thwaites

**Title** Partner in "Onside"

**When** Ongoing, annual

**Where** North-West England

Gives a strong education and mentoring approach.

### What

Network of youth centres.

### Commercial outcome

- ▶ Engagement with local communities.
- ▶ Demonstrates commitment to improving the local area.

### Community impact

- ▶ Provides young people with a safe environment in which to spend their leisure time.
- ▶ Gives a strong education and mentoring approach to help the most disadvantaged young people in society become good citizens.


**CASE STUDY**


**Brewer** A. Le Coq

**Title** Scholarship for vocational education students

**When** Since 2007

**Where** Tartu and Võru, Estonia

## Stimulating youth to get vocational education.

### What

Scholarships competition for Tartu and Võru Vocational Education Centre students who are studying a subject which has the practical value for the beer sector such as mechatronics, information technology systems, also electricians and locksmith professions. The scholarship of 2,600 EUR is granted for the two most successful candidates. The grantee also has the opportunity to implement training in the enterprise and if an available position occurs then they might receive also a job offer.

### Commercial outcome

- ▶ Supports Tartu and Võru Vocational Education Centre's two most successful students.

### Community impact

- ▶ To stimulate the young to get vocational education.
- ▶ To give training opportunities for students.
- ▶ To give grantees financial support while studying and to grow motivation to develop themselves in the chosen field.
- ▶ To give students a realistic overview of beverage and food industry functioning.


**CASE STUDY**


**Brewer** A. Le Coq

**Title** Young athlete of the year

**When** Since 2006

**Where** Estonia

## Rewarding sporting excellence in youth.

### What

The annual grant (63,912 EUR) for young athletes up to the age of 21 is awarded each year to a young sports man or woman who has exhibited excellent results at the international level and the desire and ability to aim even higher in professional sports.

The recipient is chosen from a single group of male and female candidates by representatives of Estonian Sports Associations and the Association of Estonian Sports Journalists.

### Commercial outcome

- ▶ Supports Estonian young athletes.

### Community impact

- ▶ To foster young sports and Estonian athletes.
- ▶ To develop the Olympic and sports movement and to support a chosen young athlete to reach high International sports results.

→ Lower beer prices are not a key factor

The industry survey shows that over half felt that lower beer prices was not an outcome of sponsorship and support or had no opinion on the matter. This seems to suggest that there is no expectation that a beer company is simply at the event to provide lower priced beer and hence boost consumption on site.

› Fig. 39

Sponsorship and support of an activity by a beer brand does not mean that those exposed to it will drink more beer.

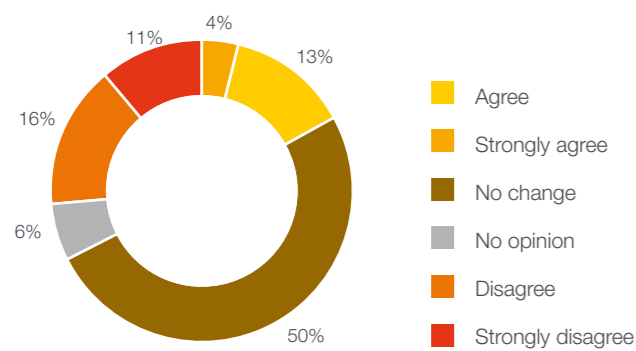
Across Europe there was a low incidence at 16.2% of people disagreeing with this notion as opposed to almost 55% who agreed with the proposition that it does not lead to more drinking of beer.

› Fig. 40

Non-beer drinkers and beer drinkers were fairly well aligned on this point.

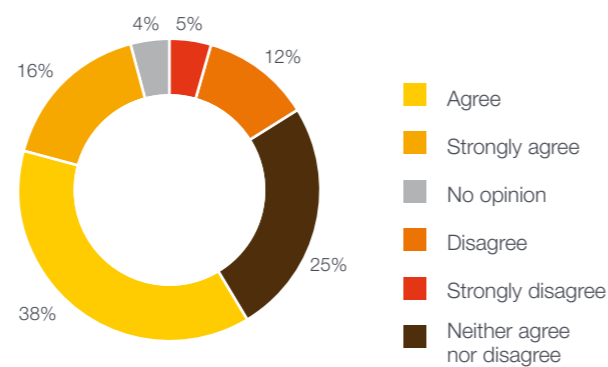
› Fig. 41

› Fig. 39 / Lower beer prices



› Source: industry survey 2011

› Fig. 40 / Sponsorship of an activity by a beer brand does not mean that those exposed to it will drink more beer

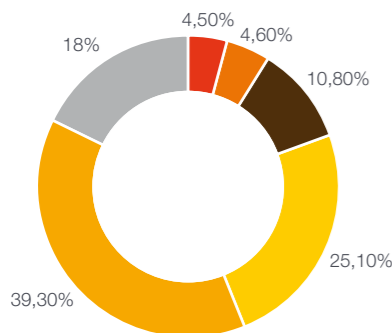


› Source: general public survey 2011

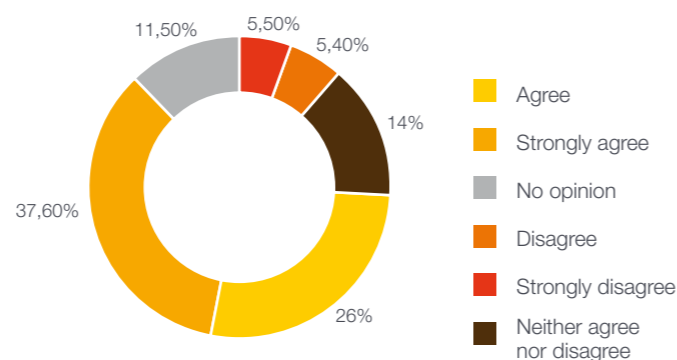
› Fig. 41 / Sponsorship of an activity by a beer brand does not mean that those exposed to it will drink more beer

Drink beer

Do not drink beer



› Source: general public survey 2011



› Source: general public survey 2011

CASE STUDY

<b>Brewer</b>	Dreher
<b>Title</b>	University Festival sponsorship
<b>When</b>	2010
<b>Where</b>	Pécs-Orfű, Hungary

Supporting the largest summer event of college and university students.

What

EFOTT is the largest summer event of Hungarian college and university students. Several well-known Hungarian music bands have concerts there, and more-and-more international musicians are coming to the festival. Concerts are accompanied by several other cultural programs (standup comedy, introduction of civil organization etc.).

Commercial outcome

- ▶ More visitors but less beer consumption than last year.
  - Visitors: 68.512 (+7%)
  - Beer sales: -17%

Community impact

The objective was to provide an experience based, unique and engaging concept that is inviting for our target group. Music and events play an important role in their life. The festival has a community-forming effect where young people from all over the country can meet and interact in a dignified manner.

➔ Little agreement that beer should not be supplied

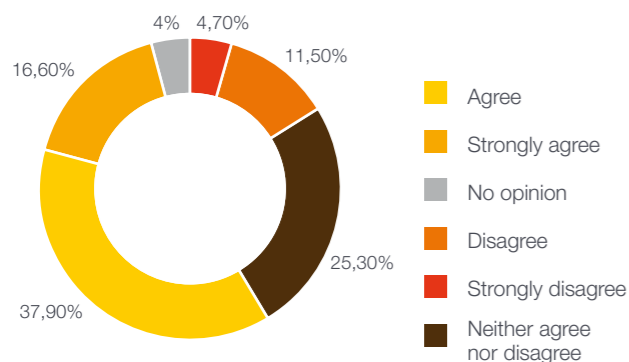
The general public were asked if beer brands should not be allowed to sponsor or supply products and there was little agreement with this notion (19.9%). Over 30% of non-drinkers felt that beer brands should be allowed to sponsor but in fact there was an overwhelming ambivalence on the issue.

➔ Fig. 42

There were some national differences on this issue. Denmark stood out with the lowest proportion (6.5%) of people believing that beer brands should not be allowed to sponsor or supply product. The highest level was in Italy at 18.8%.

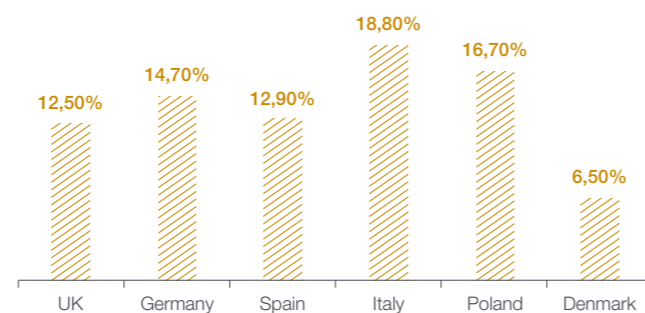
➔ Fig. 43

➔ Fig. 42 / Beer brands should not be allowed to sponsor or supply product?



➔ Source: general public survey 2011

➔ Fig. 43 / Beer brands should not be allowed to sponsor or supply product?



➔ Source: general public survey 2011

➔ Taste and personal recommendation are more powerful drivers in brand choice than support or sponsorship

The evidence here is that advertising and sponsorship are equally effective in helping drive brand affiliation. Both though are considered to be much less important factors than taste, promotions and personal recommendation.

➔ Fig. 44

➔ Taste is what most encourages purchase or drinking beer in those not originally planning to

When it comes to unplanned consumption or purchase of beer, advertising and sponsorship are ranked almost together as a driver in spontaneous buying of beer amongst the most insignificant drivers.

➔ Fig. 45

➔ Fig. 44 / In the past, which of the following have made you choose one particular brand of beer instead of another brand?



➔ Source: general public survey 2011

➔ Fig. 45 / And in the past, which of the following have encouraged you to buy or drink beer when you were not originally planning to?



➔ Source: general public survey 2011

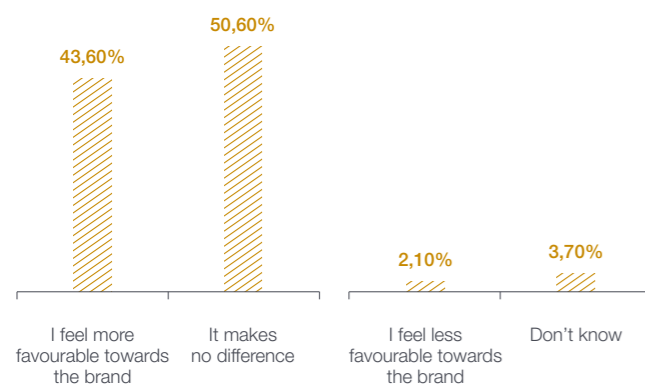
The evidence from this survey of the general public is that there is an even split between those who say their favourability is unchanged by support of an activity in which they have an interest and those who say they are unaffected.

› Fig. 46

The general public say that sponsorship is different to advertising and in the eyes of Europeans more agree (45.7%) than disagree (22%), but there is a large group who have no real opinion on whether there is a clear distinction. Local and community support and sponsorships are probably seen more favourably, as it is more tangible than large sponsorships which don't impact the lives of individuals very directly and are perceived as being closer to advertising.

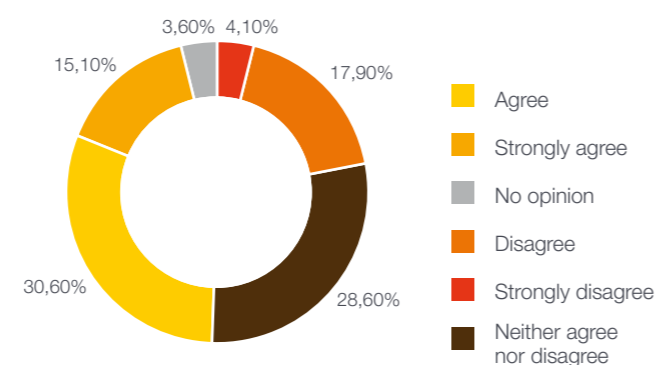
› Fig. 47

› Fig. 46 / Favourability towards a sponsor of an event of interest



› Source: general public survey 2011

› Fig. 47



› Source: general public survey 2011

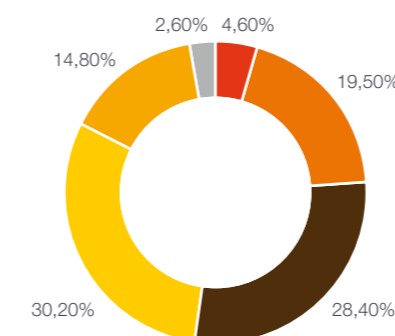
Nor was there much difference in this perception between beer drinkers and non-drinkers.

› Fig. 48

It is clear though that sponsorship is seen as being a benefit to brands with only 12% disagreeing with the statement: "Sponsorship is carried out purely for commercial reasons". This recognition does not seem to make people averse to sponsorship though. When asked: "Is there is too much sponsorship nowadays?" 36% were not worried, with another 20% ambivalent. There is an acceptance that "sponsorship is now standard practice" with 72% of the sample agreeing with that statement. Sponsorship within different mediums, such as arts or broadcast sponsorship does generate variations in opinions. For example, just over 40% of Europeans think that sponsoring a television broadcast is acceptable, possibly because of the perceived similarity with advertising. When it comes to sponsorship's ability to make statements about a brand's attributes, the going is harder as can be seen when asking if sponsoring the arts brings an increase in goodwill towards that brand. Only 23% agreed to this proposition, with uniformity around this statement in all countries, except Denmark which was exceptionally low at 15.6%.

› Fig. 48 / Sponsorship is no different to advertising

Drink beer



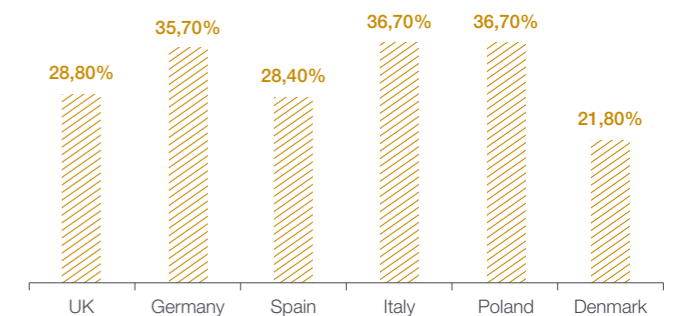
› Source: general public survey 2011

› Do sponsors have too much influence?

On average 31.4% felt this way with significantly less agreement in Spain, and especially Denmark.

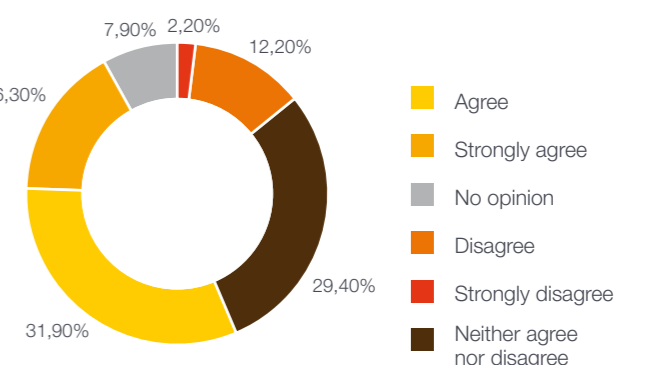
› Fig. 49

› Fig. 49 / Do sponsors have too much influence?



› Source: general public survey 2011

Do not drink beer



› Source: general public survey 2011



➔ **No strong views on beer brands being allowed to have advertising around venues**

Over a third of the general public had no real opinion on this issue, whilst only a quarter believed that such advertising should not be permitted.

➔ Fig. 50

➔ **Beer companies should sponsor and support more activities**

Just 10% of people (and only 3.5% strongly) disagreed with this idea, whilst the remainder either agreed (42%) that beer companies should sponsor and support more activities, or had no opinion either way (48%).

➔ Fig. 51

**Summary of Impact of Brewers' Involvement and Support for the Community**

*The beer brands and rights holder survey results show that support to cities and communities outstrips even sport, and by quite some margin. Brewers are also very active in the arts and culture supporting a huge spread of activities from gastronomic festivals, to music festivals and museums. In sports there is an emphasis on the grassroots as well as the big events and teams, and in general terms 84% of the activities under study were either local or regional.*

*The survey shows that beer funding is considered very important in allowing many of these activities to take place and that the biggest beneficiaries are the spectators and participants. Development of the activity, publicity for the event, enhancement of the experience at the event and lower ticket prices were all mentioned as benefits of beer involvement.*

*Beer was felt to be as appropriate a type of partner as any other industry and there was a strong feeling that for a beer brand to be supporting a venue such as a sports hall or a cultural centre is the most appropriate of all. Funding communities was seen by the majority as acceptable with 52% saying that beer funds should be supporting local communities.*

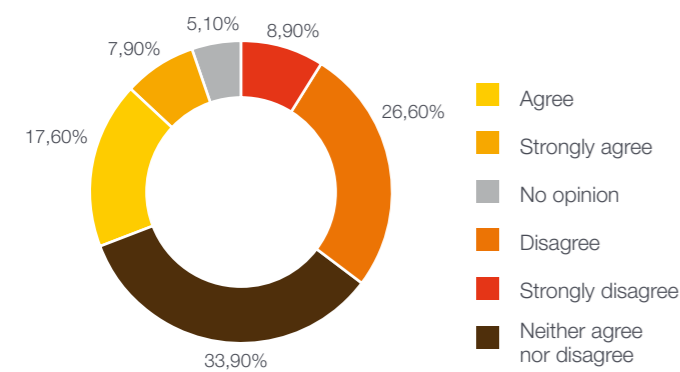
*When probing for negative effects it was found that only 5% of the industry survey believed that they had experienced problems from the support of beer companies with 68% claiming not to have had problems.*

*A number of case studies from sports federations such as UEFA and FISU showed that responsible drinking messages are part of the package and the industry survey showed that 73% of brewers and events claimed that their activities do highlight responsible drinking. The public felt that beer support does not lead to increased consumption and the industry felt that lower beer prices are not a key outcome of sponsorship and support.*

*77% of the events under study and 50% of the general public thought that finding a non-beer sponsor or supporter to replace the current supporters would be difficult.*

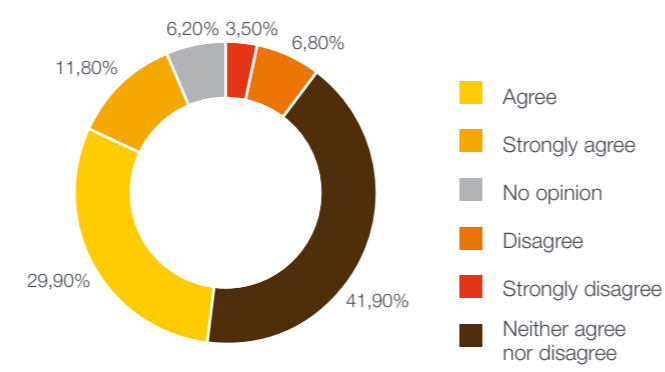
*The general public have no very strong views on the issue of beer support, nor do they really feel that sponsorship is a big driver in their behaviour and certainly not when it comes to purchase consideration. This is linked far more to the taste, word of mouth, personal recommendation and even the weather.*

➔ Fig. 50 / Beer brands should not openly have advertising around venues



➔ Source: general public survey 2011

➔ Fig. 51 / Beer companies should sponsor and support more activities



➔ Source: general public survey 2011

# Part Three

## Evaluating the Value of Brewers' Community Involvement



### Economic value

By considering and measuring the economic impact of the support by breweries, in terms of financial contributions and the provision of products to activities across Europe, then an overall value of the amount can be calculated. This sum, which has not been assessed before, indicates the benefit in economic terms that brewers provide to the community.

#### → Methodology

The total expenditure by breweries has been estimated in three different ways in order to arrive at the most accurate overall figure possible:

#### → Method 1

Leading international sponsorship research agency IEG in Chicago states that total worldwide spend on sponsorship (not including community support) in 2011 is US\$ 48.7 billion, or €34.36 billion. IEG calculates the share of this in Europe to be 28%. This results in a total European market size for sponsorship of €9.59 billion.

Using the sample of beer sponsorships publically reported in 2010 by The World Sponsorship Monitor (TWSM), 9% of European sponsorship spend was accounted for by beer companies. This seems a reasonable assumption as IEG separately has calculated in 1995 that alcohol (in general) sponsorship made up 11% of all sponsorship expenditure. Using the latest figure given by TWSM, this means that on the basis of this method, European sponsorship by the beer sector would account for **€863 million**.

#### → Method 2

Taking the analysis of the 8,182 separate community supports and sponsorships gathered from European brewers through the industry survey undertaken as part of this report, and comparing this to the market share in each country, gives an extrapolated combined total of **€1,095,316,759** spent over the course of one year.

The first conclusion is that this is already higher than the figure obtained in Method 1, which accounts for just sponsorship alone. This means that when the number of community based sponsorship that have been received from the survey is added in, brewers are spending more than the sum defined by the narrow term 'sponsorship', which is a reasonable assumption.

#### → Method 3

However if the figures gained from the industry survey by individual country are analysed, more data was received from some countries than others and the data was not always presented in a uniform way. Therefore a gap analysis has been made to see which breweries sent information and then extrapolate the remainder for that country using the market share of those breweries that did send information.

To try to correct this, another measure has been used. Most sponsorship experts believe that the proportion of sponsorship spend to total marketing spend on average internationally is between 7 and 12%, so a factor of 10% is used here.

If the level of paid advertising spend is considered, and given that beer spends more on the community support than just sponsorship alone, the percentage of 40% of figures available on total advertising spend has been taken and cross referenced against all the numbers for each country to find a sensible estimate.

These paid advertising spend figures come from The European Association of Communication Agencies (EACA) and The Brewers of Europe and represent the cost of expenditure on advertising in newspapers, television, radio and internet, but not on other below-the-line activities like sponsorship. Therefore, assuming that sponsorship is approximately 20% of each EACA sum in proportion, there is also the community activity to add in on top which is an equivalent amount as the measured sponsorship, so the figure of 40% is felt to be a fair reflection of the size of the overall beer support for community and sponsorship spend.

The methodology then used has been for each country where there are two or more potential figures, to assess them and compare them to take the most appropriate figure as the recommended figure for each country, so that it is proportionate and fair. The figure gained through this method is found to be **€928,079,225**.

## Value for rights owners

### → Final Financial Calculation

A comparison of the figures provided by these three methods, shows that they range from €863 million in Method 1 to (around) €928 million from Method 3 and up to approximately €1,095 million on Method 2.

It is felt, therefore, that these sums are all relatively consistent, with an average of €962 million. It is also felt that the middle sum should be taken as being the best estimate of the most probable reasonably accurate amount of beer sponsorship and community support.

This gives the overall figure of well over **€900 million** that can be confidently published as the amount given by breweries to support community projects and sponsorship during the past year.

As established earlier in this research, support by beer companies is seen by many of them to be of considerable value and importance. The industry survey showed showed in fig 23 that only 8% of those that responded felt that such sponsorship and support did not benefit the community as opposed to 60% believing that this was a positive benefit. From the rights owners' perspective, only 12% were concerned about having a beer sponsor but the clear majority recognised the core benefits that this partnership could offer.

For countless years, beer companies have provided financial support to community events, mostly through low-key contributions but increasingly through the medium of high-profile support and sponsorship, which can gain mass awareness.

The association of beer companies and community activities, such as sport in particular, is long-standing and, in most people's view, acceptable. Certainly, rights owners have their own criteria for selecting the best sponsorship partner, and would only accept a beer sponsor or supplier if they were totally happy that it matched their needs, was not targeted at underage, and did not detract from the event and from their members and supporters.

As expected, there was a close link between alcoholic drinks companies and sports bodies and clubs, not just via sponsorship but also through other forms of support such as provision of product. This is particularly important to regional and local community clubs and organisations. A research project in New Zealand undertaken for the government recently calculated that around 9% of clubs' income is received from alcoholic drinks sector sponsorship (including an estimated value of products/ supplied "in kind"). The sale of alcoholic drinks was a "key source of revenue for many licensed clubs" with around 13% of all liquor licenses in New Zealand being at these sports clubs, and for these, on average "around 34% of club's income is received from the sale of alcohol".

*(SPARC 2010)*

What is often forgotten is that recipients of support (rights owners), whether they are international sports bodies or regional cultural organisations, will all have their own internal rules and regulations which they have developed and agreed democratically over many decades as to their commercial partnerships. They might decide never to take an alcohol sponsor or only a low alcohol level sponsor, but overall will only take a beer sponsor if they feel it is appropriate to them and their activity. For instance, two of the case histories within this report show how international sports federations, rowing and basketball, take different approaches, depending on their participants and profile.

In recent years, breweries have become more transparent about their support, and have linked into wide campaigns regarding responsible drinking as part of larger educational programmes. Similarly, recipients of support are taking more action to bring in self-regulation and take on responsibility themselves for their participants and supporters.

As public sector support of activities has decreased over the years, organisers have become more reliant on financial and product support in order to be viable. The figures given earlier from The World Sponsorship Monitor demonstrate that beer is the fifth highest form of publicly-announced sponsorship, but when the additional low-key support to community activities is added in, this is likely to be much higher. Looking at the other top high-profile industry categories (automotive, banking, clothing, gambling, telecommunications and airlines) none of these have the same spread of small companies with local community links as the breweries do, and therefore, they would never have the same additional grassroots community support involvement. The overall value of beer company support to rights holders at all levels is absolutely clear.

Due to the close link between the social aspect of community events and drinking, beer companies have a close synergy and relevance to many recipients and their activities. The industry survey earlier in Fig. 36 shows that 77% of those surveyed would find it hard to find a replacement non-beer sponsor, should they not retain their current beer company support. This is backed up by another survey undertaken by Comperio for The European Sponsorship Association which found that if there was a reduction in beer company support in future, over 55% of rights holders stated their events would be affected.

*(ESA 2009)*

The scoping study by SPARC in New Zealand said that "any reduction in revenue or additional compliance costs may put many clubs' viability at risk or will result in reduced activities", which in turn "may have implications for the social capital that having strong community-centred clubs provides".

*(SPARC 2010)*

Another antipodean report for the Foundation of Advertising Research (FAR) looked at the economic impact of alcohol sponsorship on events, with the contribution ranging from 8% up to 50% of total income for rights owners. It was clear that all their budgets were tight, and if there was any reduction in the percentage level of support, "the organisations would need to make significant cuts and this would be at the community level."

*(Harker et al 2006)*

While elite activities are likely to be more attractive and able to find alternative funds to beer companies if they wish due to the high profile they are able to offer alternative sponsors, most community grassroots activities would find it hard to replace this income, since there are few others that have the same synergy and social connection as that of a beer company. In the longer term, the FAR report also predicted that while elite teams might survive for a while, in the long term the quality of these teams would erode with the lack of new, quality participants.

All these points demonstrate that the provision of the support by brewers has immense value to rights owners of all types and levels of activity, and that the obvious association between them both is something that is long-standing and seen to be highly appropriate. In particular, at grass-roots level, there are no other types of companies that would give as much support of the same highly-significant amount as currently provided by breweries.

## Value for communities

Beer company support of the community has been around for many years and it has a long association with sport and cultural events. As stated at the beginning of the Irish government's report into alcohol industry sponsorship: "Ireland has a long love affair with alcohol throughout its history and the use of alcohol is linked to many of our cultural events and lifestyle".

*(Breen 2007)*

There is proven value in the benefits given by beer supporters of community events, with public appreciation of its importance to local community events through long-term association and its support for culture and sport, by providing opportunities and funding that would not otherwise be there.

Earlier in this report, the public survey gave clear results on their views on beer support of community activities, which demonstrated that the majority of people were in favour of this and only 18,4% not believing breweries were an appropriate sponsor (fig 33) and 21.6% feeling that such support was not suitable for sports sponsorship (fig 34).

In fact, there was a clear opinion of the general public shown in fig 27, with 52.2% agreeing that breweries ought to be putting funding into community activities (with only 7.8% against this), and even the majority of non-drinkers not seeing a problem in having beer brand support of events.

This acceptance of beer support was covered in the New Zealand FAR report, which felt that alcohol companies were leading sports sponsors for two key reasons: firstly the loyalty factor - in that some companies had been supporters for over 20 years and remained loyal through good and bad times - and secondly, the close link between sport and social drinking at entertainment events, where alcohol companies had licenses and pourage rights.

*(Harker et al 2006)*

Their investigation into how the community views support by alcohol companies was considered through research of a range of events and public opinions. It was found that there was strong public endorsement of the support by alcohol companies of community events, as there was limited other funding and the view was that alcohol brands encourage social and cultural well-being through providing added value. In particular, having "alcohol sponsorship of arts events and organisations has enabled the development of innovative ideas and professional quality", which would not have been possible if there was alternative public funding instead.

The importance of beer company support at community level has also been recognised by experienced politicians and decision-makers. In November 2008, when he was the UK's Shadow Minister for Sport and Olympics, Hugh Robertson said in an interview to SportBusiness: "I know both from my own experience of growing up playing sport in Kent and my work as a constituency MP that the sponsorship offered by alcohol companies to community sports clubs brings a considerable number of benefits, both financially and in kind. This allows sports clubs to reach out to more people or improve their offer in a way that would not otherwise be possible."

The affect that any reduction in such support would have has been looked at in other research done at Cardiff University amongst young people. It commented that "it could well be the less high-profile sports and events which would suffer most, thus decreasing sporting opportunities for young people" and that "this would be a high price to pay".

*(Davies 2009)*

It is not just sport that benefits, although this is the most well-known area of beer company funding. Considering the many case histories included in this report, there is an enormous range of activities that receive support from breweries at all levels. Clearly cultural activities (from concerts to theatre and from pop music festivals to exhibitions), social programmes in education and health, and trust funds and charities are all significant beneficiaries from brewery support.

Clearly, communities gain much from being the recipients of beer sponsorship and support, not only in financial and product terms, but also in terms of improved quality and added-value. This high level of brewery support provides benefits, some of which are measurable but others that are related to providing a range of intangible benefits and opportunities. The implications of not having this extensive support would be enormous. As the FAR report concludes, quite strongly, "If alcohol sponsorship was removed, the social, economic, environmental and cultural capital of New Zealand communities would be eroded."

*(Harker et al 2006)*

## Summary of Value of Brewers' Community Involvement

*The details of almost all sponsorship and support activities are extremely confidential. Not only is the price paid often not revealed but even the duration of the agreement is kept secret making it difficult to obtain market information, and there is also a further sum spent on leveraging that is sometimes mentioned but at other times ignored. As so many of the brewers' activities are local and relatively low cost there is no reporting of them at all, making it hard to estimate the extent of this type of support. This study is the most comprehensive attempt yet made to evaluate the amount of funding to the community made through European breweries but still relies on best estimates and extrapolation.*

*However there is no doubt that at least €900 million is being committed over a 12 month period by breweries to community activities and sponsorship across Europe. The amount of money and goods provided to grassroots sports, charity and culture and community are lower in proportion than that provided to major sports agreements but in most countries these grassroots activities are numerically the highest.*

*The value of this funding to rights owners is major, being a massive provision of finance and support, not just to elite high-profile events, but also to local grass-roots community activities, for instance to sport, culture, education and charities. There has been a long-term reliance on this support, and for many it is a natural partnership linked to the social aspects of their activities.*

*Similarly, the individuals within communities benefit, whether as participants, members or spectators. This research has demonstrated clearly their acceptance and appreciation of the brewery companies for this support, and their concerns as to the potential impact if this vital source of funding was ever to be reduced. In fact, there is the strong wish that this support is increased, since the value and synergy of such funding is clearly understood and recognised. As pressure on public spending increases, it is the low-key community activities that are increasingly dependent on commercial funding by breweries to support their existence.*

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## Bibliography, Credits & References

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# Glossary

## Glossary

### **EACA**

European Association of Communication Agencies

### **ESA**

European Sponsorship Association

### **Evaluation**

The process of establishing whether a sponsorship has achieved the objectives ascribed to it at the outset. This includes both measurement and interpretation of outcomes.

### **ICC**

International Chamber of Commerce

### **Leveraging**

An alternative way of referring to sponsorship activation, the process by which sponsors develop programmes around the rights they have purchased to bring their sponsorships to life for their target audiences.

### **Legal drinking age (LDA)**

Legal drinking age, being the youngest age at which a person is legally permitted to drink alcoholic beverages. It is often different from the age at which one is permitted to buy alcohol. This age and the laws vary from country to country.

### **Marketing in Kind (MIK)**

Where a sponsor uses its own marketing reach to amplify the marketing efforts of the sponsored property to increase awareness and interest in the property and so drive, e.g. property ticket sales, property database registrations or influencers' opinions.

### **Non-governmental organisation (NGO)**

Non-governmental organisation, a non-profit, voluntary citizens' group which is organized on a local, national or international level.

### **Property**

A project, event, team, venue or other entity offered on the market for sponsorship, usually but not exclusively from the sports, cultural, entertainment, charity or grassroots sectors, e.g. a specific art exhibition, a music festival or a sports team.

### **Qualitative research**

Provides contextual information through focus groups, interviews.

### **Quantitative research**

Provides statistical information based on a sufficient large sample of people to be considered representative of the audience. Usually involves the completion of a questionnaire on paper, by phone or online.

### **Rights owner**

The person or organization that owns the physical or intellectual rights to the sponsorship property, e.g. Tate Modern or FIFA. (Also can be called rights holder, or event organiser, or sponsorship property owner)

### **Sponsor**

A person, brand or corporation that gives money to a project, individual, etc., for a specific purpose, in exchange for directly related benefits such as publicity, hospitality or sales opportunities.

### **TWSM**

The World Sponsorship Monitor. An annual publication providing an on-going survey of sponsorship deals happening worldwide reported through the press and internet.

### **Value in Kind (VIK)**

Where sponsors provide goods and services to the sponsored property in full or part payment for their rights of association. These goods and services may be budget-relieving (e.g. provision of beer) or may enhance.



# Appendix Questionnaire

## Questionnaire: Public Survey on Brewers' Support and Sponsorship of the Community

This survey aims to find out your view about the role that sponsorship and support by beer companies represents for communities through sports, arts and culture and other activities. Thank you for your time.

### Q1. How old are you? (If Under 18, then stop survey)

- Under 18
- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65+

### Q4. Which of these activities are you particularly interested in or support?

- Sport
- Culture
- Community
- Charity
- Environment
- Shows and Exhibitions
- Media

### Q2. Are you...

- Male
- Female

### Q3. What is your occupation?

- Higher managerial, administrative or professional
- Intermediate managerial, administrative or professional
- Junior managerial, administrative or professional/clerical
- Skilled manual
- Semi-skilled manual
- Unskilled manual & casual work
- Student
- Retired
- Housewife / househusband
- Unemployed
- Other

**Q5. How much do you agree with the following statements about sponsorship?**

	Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	No opinion
Sponsorship is no different to advertising						
Sponsorship is carried out purely for commercial reasons						
There is too much sponsorship nowadays						
Sponsorship is now standard practice						
Sponsorship of television programmes is acceptable						
Sponsors of the arts and culture show more goodwill than sponsors of sports						
Sponsors have too much influence						
Sponsors help to make events more enjoyable						
When I see a company sponsoring an event I become more favourable towards them						
Sponsorship contributes to the development of sports events						
Sponsorship contributes to the development of arts and cultural events						

**Q6. Generally, if a particular company sponsors or supports an activity you are interested in, how does the involvement make you feel about that brand over another one?**

- I feel more favourable towards the brand
- It makes no difference
- I feel less favourable towards the brand
- Don't know

**Q7. How does a brand's involvement in an activity you are interested in affect the likelihood of you considering that brand over another in the future?**

- I am much more likely to consider that brand
- I am slightly more likely to consider that brand
- It wouldn't make any difference to my consideration
- I would deliberately not consider that brand in the future
- Don't know

**Q8. How appropriate do you think the following brand sectors are as sponsors?**

	Not at all appropriate	Not very appropriate	Neither appropriate nor inappropriate	Quite appropriate	Very appropriate	Don't know
Electronics						
Mobile phones						
Beer brands						
Financial services						
Soft drinks						
Airlines						

**Q9. To what extent do you agree that the following outcomes can result from sponsorship?**

	Strongly Agree	Agree	No change	Disagree	Strongly disagree	No opinion
Reduced ticket prices						
Enhancement of the event						
Community benefits						
Greater publicity						
Ability for the event to take place						

**Q10. Do you drink beer?**

- Yes
- No

**Q11. How often do you drink beer?**

- Less than once a month
- About once a month
- A few times a month
- Once a week
- More than once a week
- Every day

**Q12. How aware are you that beer brands sponsor or support community activities?**

- Very aware
- Quite aware
- Not really aware
- Not at all aware
- Don't know



**Q13. How appropriate do you think it is for beer brands to sponsor each of the following:**

	Not at all appropriate	Not very appropriate	Neither appropriate nor inappropriate	Quite appropriate	Very appropriate	Don't know
Sport						
Culture						
Community						
Charity						
Environment						
Shows and Exhibitions						
Broadcast / media / digital						
Personality Endorsement						
Venues						

**Q14. How much do you agree with the following statements about beer brands and sponsorship and promotional activity?**

	Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree	No opinion
Sponsorship of an activity by a beer brand does not mean that those exposed to it will drink more beer						
Those exposed to it will shift their preference to the beer brand that is sponsoring the activity						
It is appropriate that beer brands are official suppliers or licensees to venues						
Sponsorship is more effective than promotional activities by beer brands						
Beer brands should not be allowed to sponsor or supply product						
Sponsorship of a activity by a beer brand raises the event's profile						
Beer brands should not openly have advertising around venues						
It is very important that beer brand sponsors also put funding into local communities						
Without beer brand support it would be difficult for some activities to get replacement sponsors						
Monies provided by beer brands in sponsorship is needed to maintain the quality of the activity						
Restrictions should be placed on beer brands engaged in sponsorship						
Beer brands should not aim their sponsorship at under 18 year olds						
All beer promotions should include responsible drinking messages						
Beer companies should sponsor and support more activities						
Community activities are appropriate opportunities for beer brands to be involved						

**Q15. Have you seen any responsible drinking messages from beer brands or breweries around sponsorship?**

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- Yes definitely
- Yes I think so
- No
- Don't know

**Q16. GERMANY: Do you specifically remember seeing the "Bier Bewusst Genieben" responsible drinking campaign?**

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- Yes definitely
- Yes I think so
- No
- Don't know

**Q17. IRELAND: Do you specifically remember seeing the "Wake Up Call" responsible drinking campaign?**

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- Yes definitely
- Yes I think so
- No
- Don't know

**Q18. PORTUGAL: Do you specifically remember seeing the "Seja Responsavel" or "Beba com Moderacao" responsible drinking campaigns?**

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- Yes definitely
- Yes I think so
- No
- Don't know

**Q19. NETHERLANDS: Do you specifically remember seeing the "Geniet Maar Met Mate" responsible drinking campaign?**

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- Yes definitely
- Yes I think so
- No
- Don't know

**Q20. UK: Do you specifically remember seeing the "Drinkaware" responsible drinking campaign?**

---

- Yes definitely
- Yes I think so
- No
- Don't know

**Q21. In the past, which of the following have made you choose one particular brand of beer instead of another brand?**

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- In-store promotions and discounts
- Advertising in the media
- Sponsorship or support of events or activities
- Personal recommendation
- Taste
- The weather
- None of these
- Other

**Q22. And in the past, which of the following have encouraged you to buy or drink beer when you were not originally planning to?**

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- In-store promotions and discounts
- Advertising in the media
- Sponsorship or support of events or activities
- Personal recommendation
- Taste
- The weather
- None of these
- Other

### Sponsorship Ideas

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