Alcohol Price and Consumer Behaviour

Main results
The Brewers of Europe have charged IPSOS with conducting a survey assessing:

- the effect of price increases of alcoholic beverages on consumers’ purchasing and drinking patterns; and
- European citizens’ perceptions of the most effective measures to help reduce alcohol-related harm.

The poll was carried out online during February and March 2009 in Denmark, Portugal, Czech Republic, and Germany.

The sample size consisted of 1,000 interviews per country, chosen according to gender, age and region.

The four countries surveyed were chosen as fairly representative of the different cultures, behaviours and attitudes of their respective regions - Northern, Southern, Eastern and Western Europe.
Key findings of the survey include:

- The vast majority of Europeans are responsible consumers of alcoholic beverages and only a small percentage regularly binge drinks or consumes over the recommended guidelines.

- For 94% of Europeans, price is not the key criterion when it comes to purchasing alcoholic beverages. For 46% taste is the main determinant, followed by the occasion for (or during) which the purchase is being made and the consumer’s mood at that time.

- Young adults, who comprise the largest group of people who ‘binge drink’, would be the least likely to reduce their alcohol consumption because of a price increase—even of as much as 25%. Rather than reducing their alcohol consumption, they would instead tend to change their purchasing behaviour, e.g. turning to cheaper drinks, buying more in shops and less in bars, switching to other categories, etc.

- The minority of respondents who regularly (6.2% of all adults surveyed) or occasionally (6.6% of all adults surveyed) drink irresponsibly are less likely than other consumers to reduce their alcohol consumption in response to price increases. Hence, only 1.8% of all respondents fall into the category of being regular irresponsible drinkers who would drink less in general following a price increase.*

- Over 90% of the people who consume alcoholic drinks said that it is not the drinks themselves but the abuse of alcohol that is the problem. They argue that every consumer should be trusted to decide how much he or she drinks.

*This survey does not provide data on by how much these regular excessive drinkers would reduce their consumption.
Over 90% of Europeans also responded that instead of price increases the focus should rather be on better education and information about the effects of alcohol consumption and proper law enforcement in cases of alcohol abuse.

The main message that can be drawn from this survey is that raising prices completely misses the target audience and would not solve the problem of alcoholic misuse, i.e. regularly drinking over recommended guidelines or binge drinking. Instead, price increases are most likely to impact the consumption levels of those who drink in moderation and responsibly.

Explanations:

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

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

About The Brewers of Europe
- The Brewers of Europe, founded in 1958 and based in Brussels, is the voice of the European brewing sector to the European institutions and international organisations.
- It has 27 members, comprising 24 national brewers’ associations from EU Member States plus Norway, Switzerland and Turkey. Of the roughly 3,000 brewers across Europe, the vast majority are small and medium-sized, local and family-run establishments.
- Today, 2.6 million jobs are directly and indirectly attributable to the European brewing sector.
- For more on The Brewers of Europe, visit www.brewersofeurope.org
Presentation of the survey
The Brewers of Europe asked Ipsos Belgium to carry out an opinion poll amongst the citizens of four European countries, in order to assess:

- the overall state of consumption habits
- the impact of a significant price increase on behaviour
- people’s perception of the most efficient measures to help reduce alcohol abuse
The Brewers of Europe, founded in 1958 and based in Brussels, is the voice of the European brewing sector to the European institutions and international organisations.

It has 27 members, comprising 24 national brewers’ associations from EU Member States plus Norway, Switzerland and Turkey. Of the roughly 3,000 brewers across Europe, the vast majority are small and medium-sized, local and family-run establishments.

Today, over 2.5 million jobs are directly and indirectly attributable to the European brewing sector.

For more on The Brewers of Europe, visit www.brewersofeurope.org
Ipsos Belgium is the leading research agency in Belgium, and a unique centre of excellence for international opinion research.

It is specialised in international coordination and social and opinion research is one of its main areas of activity.

No less than 300 clients are served every year by 60 research specialists, generating an annual turnover of 11 million Euro in the framework of just below 700 projects. Ipsos Belgium conducted about 700,000 interviews last year.

Ipsos Belgium has conducted research on behalf of institutions, governments, corporations, industry, professional associations and the non-profit sector for more than 30 years.

For more on Ipsos Belgium, visit www.ipsos.be
2. Methodology

2.1. Target population

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

2.2. Sample size

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

2.3. Interview Technique

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

#### 2.5. Sample profile

<table>
<thead>
<tr>
<th></th>
<th>GLOBAL</th>
<th>CZ</th>
<th>DK</th>
<th>GE</th>
<th>PT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>50%</td>
<td>50%</td>
<td>50%</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>Female</td>
<td>50%</td>
<td>50%</td>
<td>50%</td>
<td>50%</td>
<td>50%</td>
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<tr>
<td>Age</td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>18 up to 25 year old</td>
<td>15%</td>
<td>16%</td>
<td>14%</td>
<td>15%</td>
<td>16%</td>
</tr>
<tr>
<td>26 up to 34 year old</td>
<td>20%</td>
<td>23%</td>
<td>19%</td>
<td>16%</td>
<td>22%</td>
</tr>
<tr>
<td>35 up to 54 year old</td>
<td>44%</td>
<td>40%</td>
<td>45%</td>
<td>49%</td>
<td>43%</td>
</tr>
<tr>
<td>55 years old and more</td>
<td>21%</td>
<td>22%</td>
<td>23%</td>
<td>20%</td>
<td>19%</td>
</tr>
<tr>
<td>Family Status</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Single</td>
<td>33%</td>
<td>26%</td>
<td>33%</td>
<td>34%</td>
<td>39%</td>
</tr>
<tr>
<td>In partnership</td>
<td>21%</td>
<td>20%</td>
<td>27%</td>
<td>24%</td>
<td>14%</td>
</tr>
<tr>
<td>Married</td>
<td>46%</td>
<td>54%</td>
<td>40%</td>
<td>41%</td>
<td>47%</td>
</tr>
<tr>
<td>Children</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>62%</td>
<td>71%</td>
<td>61%</td>
<td>57%</td>
<td>57%</td>
</tr>
<tr>
<td>No</td>
<td>38%</td>
<td>29%</td>
<td>39%</td>
<td>43%</td>
<td>43%</td>
</tr>
<tr>
<td>Income</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>&lt;1000 euros</td>
<td>19%</td>
<td>40%</td>
<td>5%</td>
<td>17%</td>
<td>16%</td>
</tr>
<tr>
<td>1000-1500 euros</td>
<td>22%</td>
<td>37%</td>
<td>7%</td>
<td>18%</td>
<td>28%</td>
</tr>
<tr>
<td>1500-3000 euros</td>
<td>26%</td>
<td>13%</td>
<td>23%</td>
<td>35%</td>
<td>32%</td>
</tr>
<tr>
<td>3000-5000 euros</td>
<td>3%</td>
<td>1%</td>
<td>26%</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>&gt;5000 euros</td>
<td>8%</td>
<td>2%</td>
<td>24%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>DK/Refusal</td>
<td>12%</td>
<td>8%</td>
<td>15%</td>
<td>15%</td>
<td>11%</td>
</tr>
</tbody>
</table>
Results
1. Consumption habits
How often did Europeans consume alcoholic drinks in the last 30 days?

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

**Base:** Total surveyed population n=3995

- Regularly drink 23%
- Occasionally drink 33%
- Infrequently or rarely drink 18%
- Do not drink alcoholic drinks 24%
- Do sometimes drink but have not consumed alcoholic drinks in the last 30 days 2%
How often did Czechs consume alcoholic drinks in the last 30 days?

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

**Czech Republic**

- Regularly drink = 21%
- Occasionally drink = 42%
- Do not drink alcoholic drinks = 18%
- Do sometimes drink but have not consumed alcoholic drinks in the last 30 days = 1%
- Infrequently or rarely drink = 18%

*Base: Total surveyed population in CZ n=997*
How often did Danes consume alcoholic drinks in the last 30 days?

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

Base: Total surveyed population in DK n=1000

- Regularly drink = 18%
- Occasionally drink = 34%
- Infrequently or rarely drink = 26%
- Do not drink alcoholic drinks = 19%
- Do sometimes drink but have not consumed alcoholic drinks in the last 30 days = 3%

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

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

Base: Total surveyed population in DE  n=1000

- Regularly drink = 18%
- Occasionally drink = 29%
- Infrequently or rarely drink = 19%
- Do sometimes drink but have not consumed alcoholic drinks in the last 30 days = 2%
- Do not drink alcoholic drinks = 32%

Alcohol price and consumer behaviour
The Brewers of Europe / April 2009
How often did Portuguese consume alcoholic drinks in the last 30 days?

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

Base: Total surveyed population in PT  n=998

Portugal

- Occasionally drink 27%
- Regularly drink 35%
- Infrequently or rarely drink 9%
- Do sometimes drink but have not consumed alcoholic drinks in the last 30 days 1%
- Do not drink alcoholic drinks 28%
On a typical drinking occasion, how much do Europeans usually drink?

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

Base: Total surveyed population  n=3995
On a typical drinking occasion, how much do Czechs usually drink?

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

Czech Republic

- Irresponsible drinking: 22%
- Moderate drinking: 53%
- Never drinks: 18%
- Light drinking: 6%
- Don’t know/refusal: 1%

Base: Total surveyed population in CZ  n=997
On a typical drinking occasion, how much do Danes usually drink?

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

**Denmark**

- Irresponsible drinking: 19%
- Moderate drinking: 55%
- Light drinking: 6%
- Never drinks: 19%
- Don’t know/refusal: 1%

Base: Total surveyed population in DK n=1000
On a typical drinking occasion, how much do Germans usually drink?

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

Germany

Base : Total surveyed population in DE  n=1000

Don't know/refusal 1%

Irresponsible drinking 13%

Never drinks 32%

Moderate drinking 46%

Light drinking 8%
On a typical drinking occasion, how much do Portuguese usually drink?

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

Portugal

<table>
<thead>
<tr>
<th>Drinking Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Irresponsible drinking</td>
<td>10%</td>
</tr>
<tr>
<td>Never drinks</td>
<td>28%</td>
</tr>
<tr>
<td>Moderate drinking</td>
<td>46%</td>
</tr>
<tr>
<td>Light drinking</td>
<td>16%</td>
</tr>
<tr>
<td>Don't know</td>
<td>0%</td>
</tr>
</tbody>
</table>

Base: Total surveyed population in PT  n=998
How often do Europeans drink 5 or more drinks in a short period of time, e.g. a couple of hours?

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Several times a week</td>
<td>2%</td>
</tr>
<tr>
<td>Once or twice a week</td>
<td>5%</td>
</tr>
<tr>
<td>Two to three times a month</td>
<td>8%</td>
</tr>
<tr>
<td>Once a month</td>
<td>9%</td>
</tr>
<tr>
<td>Less than once a month</td>
<td>27%</td>
</tr>
<tr>
<td>Never</td>
<td>50%</td>
</tr>
</tbody>
</table>

Base: Total surveyed population n=3995
How often do Czechs drink 5 or more drinks in a short period of time, e.g. a couple of hours?

Czech Republic

Base: Total surveyed population in CZ n=997

- **Several times a week**: 1%
- **Once or twice a week**: 7%
- **Two to three times a month**: 12%
- **Once a month**: 11%
- **Less than once a month**: 28%
- **Never**: 41%
How often do Danes drink 5 or more drinks in a short period of time, e.g. a couple of hours?

**Denmark**

- **Several times a week**: 1%
- **Once or twice a week**: 5%
- **Two to three times a month**: 10%
- **Once a month**: 10%
- **Less than once a month**: 36%
- **Never**: 37%

*Base: Total surveyed population in DK n=1000*
How often do Germans drink 5 or more drinks in a short period of time, e.g. a couple of hours?

Germany

<table>
<thead>
<tr>
<th>Frequency</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Several times a week</td>
<td>1%</td>
</tr>
<tr>
<td>Once or twice a week</td>
<td>4%</td>
</tr>
<tr>
<td>Two to three times a month</td>
<td>5%</td>
</tr>
<tr>
<td>Once a month</td>
<td>7%</td>
</tr>
<tr>
<td>Less than once a month</td>
<td>23%</td>
</tr>
<tr>
<td>Never</td>
<td>59%</td>
</tr>
</tbody>
</table>

Base: Total surveyed population in DE  n=1000
How often do Portuguese drink 5 or more drinks in a short period of time, e.g. a couple of hours?

**Portugal**

<table>
<thead>
<tr>
<th>Frequency Description</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Several times a week</td>
<td>1%</td>
</tr>
<tr>
<td>Once or twice a week</td>
<td>5%</td>
</tr>
<tr>
<td>Two to three times a month</td>
<td>5%</td>
</tr>
<tr>
<td>Once a month</td>
<td>6%</td>
</tr>
<tr>
<td>Less than once a month</td>
<td>18%</td>
</tr>
<tr>
<td>Never</td>
<td>64%</td>
</tr>
</tbody>
</table>

*Base: Total surveyed population in PT n=998*
### Total drinkers

<table>
<thead>
<tr>
<th>Occasion</th>
<th>Percentage</th>
<th>Base</th>
</tr>
</thead>
<tbody>
<tr>
<td>At parties/ outdoor events</td>
<td>74%</td>
<td>18-25 years 88%</td>
</tr>
<tr>
<td>At special events</td>
<td>71%</td>
<td></td>
</tr>
<tr>
<td>When out with friends</td>
<td>70%</td>
<td>Occ. irresponsible. cons. 89%</td>
</tr>
<tr>
<td>During meals*</td>
<td>66%</td>
<td>Rarely irresponsible. cons. 85%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Occ. binge drink 80%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>25-34 years 80%</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
<td>Reg. Light consumers 88%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Reg. mod. consumers 85%</td>
</tr>
<tr>
<td></td>
<td></td>
<td>55+ 80%</td>
</tr>
</tbody>
</table>

*During meals + over a meal with family, friends or colleagues.
### On which occasions do Czechs who drink typically have a drink?

**Czech Republic**

<table>
<thead>
<tr>
<th>Occasion</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>When out with friends</td>
<td>73%</td>
</tr>
<tr>
<td>At parties/ outdoor events</td>
<td>65%</td>
</tr>
<tr>
<td>At special events</td>
<td>61%</td>
</tr>
<tr>
<td>During meals</td>
<td>46%</td>
</tr>
<tr>
<td>When watching television</td>
<td>22%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
</tr>
</tbody>
</table>

*Base: Consumers of Alcoholic Drinks in CZ n=813*
On which occasions do Danes who drink typically have a drink?

**Denmark**

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

- **At parties/ outdoor events**: 81%
- **At special events**: 71%
- **During meals**: 71%
- **When out with friends**: 61%
- **When watching television**: 13%
- **Other**: 8%
On which occasions do Germans who drink typically have a drink?

Germany

Base: Consumers of Alcoholic Drinks in DE  n=677

- At special events: 76%
- When out with friends: 72%
- At parties/outdoor events: 68%
- During meals: 60%
- When watching television: 33%
- Other: 10%
On which occasions do Portuguese who drink typically have a drink?

**Portugal**

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

- During meals: 86%
- At parties/ outdoor events: 84%
- At special events: 77%
- When out with friends: 76%
- When watching television: 8%
- Other: 2%
In order to allow useful analysis and a clear overview of the main findings, we have built the following indicators based on the questions directly asked in the questionnaire:

- In the last 30 days, how often did people drink alcoholic beverages? (Based on Q2)
  - Daily
  - 4-5 times a week
  - 2-3 times a week
  - Once a week
  - 2-3 times a month
  - Once
  - Did not drink in the last 30 years
  - Non-drinkers

- On a typical consuming occasion, how much do they drink? (Based on Q3)
  - Non-drinkers
  - Less than one drink
  - 1 drinks/glass
  - 2 drinks/glasses
  - 3 drinks/glasses
  - 4 drinks/glasses
  - 5 drinks/glasses
  - 6 drinks/glasses or more
  - « Light drinking »
  - « Moderate drinking »
  - « Irresponsible drinking »

How to read the results

« Light drinking »
« Irresponsible drinking »
« Regular consumers »
« Occasional consumers »
« Infrequent or rarely consumers »
## Frequency of alcohol consumption general

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

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

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

<table>
<thead>
<tr>
<th>Drinking Behaviour</th>
<th>Total surveyed population (n=3995)</th>
<th>Regular consumers</th>
<th>Occasional consumers</th>
<th>Infrequent consumers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not drink</td>
<td>24%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No drink in last 30 days</td>
<td>2%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Light drinking</td>
<td>9%</td>
<td>3%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Moderate drinking</td>
<td>50%</td>
<td>14%</td>
<td>22%</td>
<td>12%</td>
</tr>
<tr>
<td>Irresponsible drinking</td>
<td>16%</td>
<td>6%</td>
<td>7%</td>
<td>3%</td>
</tr>
</tbody>
</table>
Based on how often people drink and how many glasses they typically drink, we can observe the following drinking behaviour

<table>
<thead>
<tr>
<th>Drinking Behaviour</th>
<th>Total surveyed population in CZ (n=997)</th>
<th>Regular consumers</th>
<th>Occasional consumers</th>
<th>Infrequent consumers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not drink</td>
<td>18%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No drink in last 30 days</td>
<td>1%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Light drinking</td>
<td>6%</td>
<td>1%</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Moderate drinking</td>
<td>53%</td>
<td>11%</td>
<td>27%</td>
<td>13%</td>
</tr>
<tr>
<td>Irresponsible drinking</td>
<td>22%</td>
<td>9%</td>
<td>11%</td>
<td>2%</td>
</tr>
</tbody>
</table>
## Danish drinking behaviours

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

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

The National Board of Health in Denmark recommends women have a max. alcohol intake of 14 units/week, and men max. 21 units/week. National studies have shown 85% of the population has a drinking behaviour in compliance with these recommendations ([http://www.si-folkesundhed.dk/Forskning/Befolkningens%20sundhedstilstand/Sundhed%20og%20sygelighed%20SUSY.aspx?lang=en](http://www.si-folkesundhed.dk/Forskning/Befolkningens%20sundhedstilstand/Sundhed%20og%20sygelighed%20SUSY.aspx?lang=en))
Based on how often people drink and how many glasses they typically drink, we can observe the following drinking behaviour:

<table>
<thead>
<tr>
<th>Frequency of Drinking</th>
<th>Total surveyed population in GE (n=1000)</th>
<th>Regular consumers</th>
<th>Occasional consumers</th>
<th>Infrequent consumers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not drink</td>
<td>32%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No drink in last 30 days</td>
<td>2%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Light drinking</td>
<td>8%</td>
<td>1%</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Moderate drinking</td>
<td>46%</td>
<td>12%</td>
<td>20%</td>
<td>13%</td>
</tr>
<tr>
<td>Irresponsible drinking</td>
<td>13%</td>
<td>5%</td>
<td>5%</td>
<td>3%</td>
</tr>
</tbody>
</table>
Based on how often people drink and how many glasses they typically drink, we can observe the following drinking behaviour.

<table>
<thead>
<tr>
<th>Drinking Behaviour</th>
<th>Total surveyed population in PT (n=998)</th>
<th>Regular consumers</th>
<th>Occasional consumers</th>
<th>Infrequent consumers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not drink</td>
<td>28%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No drink in last 30 days</td>
<td>-</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Light drinking</td>
<td>16%</td>
<td>7%</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>Moderate drinking</td>
<td>45%</td>
<td>21%</td>
<td>19%</td>
<td>6%</td>
</tr>
<tr>
<td>Irresponsible drinking</td>
<td>10%</td>
<td>7%</td>
<td>2%</td>
<td>0.4%</td>
</tr>
</tbody>
</table>
How often do people drink 5 or more drinks in a short period of time (= binge drinking)?

- Several times a week
- Once or twice a week
- Two or three times a month
- Once a month
- Less than once a month
- Never
- Non-drinkers

« Regularly binge drink »
« Occasionally binge drink »
« Extremely rarely or never binge drink »
## Binge drinking frequency

<table>
<thead>
<tr>
<th>Category</th>
<th>Total surveyed population (n=3995)</th>
<th>Czech Republic (n=997)</th>
<th>Denmark (n=1000)</th>
<th>Germany (n=1000)</th>
<th>Portugal (n=998)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extremely rarely or never binge drink (non-drinkers included)</td>
<td>77%</td>
<td>70%</td>
<td>73%</td>
<td>82%</td>
<td>80%</td>
</tr>
<tr>
<td>Occasionally binge drink</td>
<td>17%</td>
<td>23%</td>
<td>21%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Regularly binge drink</td>
<td>7%</td>
<td>7%</td>
<td>6%</td>
<td>5%</td>
<td>7%</td>
</tr>
</tbody>
</table>
2. Consequences of price policy on the purchasing and consumption behaviour of people who drink

(*Sample size: 3018 out of 3995*)
What is the first criterion for Europeans who drink when buying alcohol?

Base: Total Consumers of Alcoholic Drinks n=3018

- **The taste**: 46%
  - 50% for people aged 18-25
- **The occasion**: 18%
- **Your mood at that moment**: 15%
  - 19% for people aged 18-25
- **The price**: 6%
  - 8% for people earning less than 1000€/month
- **The origin or appellation**: 5%
- **As refreshment**: 3%
- **The brand image**: 2%
- **The alcohol strength**: 1%
- **The weather**: 0%
- **Other**: 2%
What is the first criterion for Czechs who drink when buying alcohol?

Czech Republic

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

- The taste: 43%
- Your mood at that moment: 22%
- The occasion: 17%
- The price: 5%
- As refreshment: 4%
- The origin or appellation: 4%
- The brand image: 4%
- The alcohol strength: 1%
- The weather: 0%
- Other: 1%
What is the first criterion for Danes who drink when buying alcohol?

**Denmark**

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

- **The taste**: 56%
- **The occasion**: 16%
- **Your mood at that moment**: 12%
- **The price**: 5%
- **As refreshment**: 3%
- **The origin or appellation**: 2%
- **The brand image**: 1%
- **The weather**: 1%
- **The alcohol strength**: 0%
- **Other**: 3%
What is the first criterion for Germans who drink when buying alcohol?

**Germany**

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

- The taste: 51%
- The occasion: 21%
- The price: 9%
- Your mood at that moment: 7%
- As refreshment: 4%
- The origin or appellation: 3%
- The alcohol strength: 1%
- The weather: 0%
- The brand image: 0%
- Other: 3%
What is the first criterion for Portuguese who drink when buying alcohol?

**Portugal**

- The taste: 33%
- Your mood at that moment: 19%
- The occasion: 19%
- The origin or appellation: 13%
- The price: 8%
- The alcohol strength: 3%
- The brand image: 3%
- As refreshment: 1%
- The weather: 0%
- Other: 2%

Base: Total Consumers of Alcoholic Drinks in PT n=677
If the price of all drinks were to increase by 25%, what would Europeans who drink most likely do?

### Total Drinkers

- **Drink the same**: 35%
- **Drink less in general**: 30%
- **Drink less often**: 18%
- **Change purchasing behaviour**: 15%
- **Other**: 2%

**Base**: Total Consumers of Alcoholic Drinks n=3018

- **26%** for those earning less than 1000€ / month
- **29%** for those earning between 1000 and 1500€ / month
- **31%** for those earning between 1500 and 3000€ / month
- **46%** for those earning between 3000 and 5000€ / month
- **65%** for those earning more than 5000€ / month

- **41%** for rare light consumers
- **12%** for rare irresponsible consumers
- **38%** for regular light consumers
- **37%** for occasional light consumers
- **24%** for occasional irresponsible consumers

- **22%** for regular moderate consumers

- **25%** for rare irresponsible consumers
- **23%** for regular irresponsible consumers
- **20%** for regular binge drinkers
- **19%** for occasional binge drinkers
- **21%** for people aged 18-25
If the price of all drinks were to increase by 25%, what would Czechs who drink most likely do?

**Czech Republic**

- **Drink the same**: 39% (42% for regular binge drinkers)
- **Drink less in general**: 24%
- **Drink less often**: 19%
- **Change purchasing behaviour**: 16% (22% for regular irresponsible consumers; 18% for regular binge drinkers)
- **Other**: 2%
If the price of all drinks were to increase by 25%, what would Danes who drink most likely do?

**Denmark**

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

- **Drink the same**: 59%
- **Drink less in general**: 18%
- **Change purchasing behaviour**: 14%
- **Drink less often**: 9%
- **Other**: 2%

---

22% for regular irresponsible consumers (incl. 4% who would consume more home-produced alcohol)
20% for occasional irresponsible consumers
24% for regular binge drinkers
If the price of all drinks were to increase by 25%, what would Germans who drink most likely do?

**Germany**

- **Drink less in general** 34%
- **Drink less often** 28%
- **Drink the same** 18%
- **Change purchasing behaviour** 17%
- **Other** 3%

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

- **27% for regular binge drinkers**
- **21% for regular irresponsible consumers**
- **26% for occasional irresponsible consumers**
- **20% for regular binge drinkers**
If the price of all drinks were to increase by 25%, what would Portuguese who drink most likely do?

**Portugal**

- **Drink less in general**: 47%
- **Drink less often**: 20%
- **Drink the same**: 19%
- **Change purchasing behaviour**: 13%
- **Other**: 2%

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

- 42% for regular irresponsible consumers
- 27% for occasional irresponsible consumers
- 43% for regular binge drinkers
- 23% for regular excessive consumers
- 27% for occasional excessive consumers
- 27% for regular binge drinkers
3. Measures to reduce alcohol abuse
General attitude amongst Europeans who drink towards price policy

Base: Total Consumers of Alcoholic Drinks n= 3018

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree</th>
<th>Disagree</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>I don’t want to pay more for my alcoholic drinks just because some people drink irresponsibly</td>
<td></td>
<td>84%</td>
<td>13%</td>
</tr>
<tr>
<td>I should be trusted to make my own decisions about how much I drink</td>
<td></td>
<td>94%</td>
<td>5%</td>
</tr>
<tr>
<td>Alcohol abuse is the problem, not the drinks themselves</td>
<td></td>
<td>91%</td>
<td>7%</td>
</tr>
</tbody>
</table>
General attitude amongst Czechs who drink towards price policy

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

<table>
<thead>
<tr>
<th>Agree</th>
<th>Disagree</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>I don't want to pay more for my alcoholic drinks just because some people drink irresponsibly</td>
<td>81%</td>
<td>14% 5%</td>
</tr>
<tr>
<td>I should be trusted to make my own decisions about how much I drink</td>
<td>90%</td>
<td>7%</td>
</tr>
<tr>
<td>Alcohol abuse is the problem, not the drinks themselves</td>
<td>92%</td>
<td>5%</td>
</tr>
</tbody>
</table>
I don't want to pay more for my alcoholic drinks just because some people drink irresponsibly

- Agree: 76%
- Disagree: 21%
- Don't know: 3%

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

- Agree: 95%
- Disagree: 1%
- Don't know: 4%

Alcohol abuse is the problem, not the drinks themselves

- Agree: 85%
- Disagree: 4%
- Don't know: 11%
General attitude amongst Germans who drink towards price policy

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

<table>
<thead>
<tr>
<th>Agree</th>
<th>Disagree</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>I don't want to pay more for my alcoholic drinks just because some people drink irresponsably</td>
<td>88%</td>
<td>2%</td>
</tr>
<tr>
<td>I should be trusted to make my own decisions about how much I drink</td>
<td>95%</td>
<td>1%</td>
</tr>
<tr>
<td>Alcohol abuse is the problem, not the drinks themselves</td>
<td>92%</td>
<td>7%</td>
</tr>
</tbody>
</table>
General attitude amongst Portuguese who drink towards price policy

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

<table>
<thead>
<tr>
<th>Statement</th>
<th>Agree</th>
<th>Disagree</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>I don't want to pay more for my alcoholic drinks just because some people drink irresponsibly</td>
<td></td>
<td>92%</td>
<td>1%</td>
</tr>
<tr>
<td>I should be trusted to make my own decisions about how much I drink</td>
<td></td>
<td>96%</td>
<td>4%</td>
</tr>
<tr>
<td>Alcohol abuse is the problem, not the drinks themselves</td>
<td></td>
<td>96%</td>
<td>4%</td>
</tr>
</tbody>
</table>
Efficient measures to reduce alcohol abuse according to Europeans who drink in the total surveyed population

<table>
<thead>
<tr>
<th>Measure</th>
<th>Very efficient</th>
<th>Quite efficient</th>
<th>Not very efficient</th>
<th>Not efficient at all</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education within the family</td>
<td>50%</td>
<td></td>
<td>33%</td>
<td>12%</td>
<td>3%</td>
</tr>
<tr>
<td>Enforce the drink driving laws</td>
<td>43%</td>
<td></td>
<td>33%</td>
<td>17%</td>
<td>5%</td>
</tr>
<tr>
<td>Education at school</td>
<td>35%</td>
<td></td>
<td>42%</td>
<td>18%</td>
<td>42%</td>
</tr>
<tr>
<td>Enforce the legal purchasing age laws</td>
<td>24%</td>
<td></td>
<td>32%</td>
<td>29%</td>
<td>12%</td>
</tr>
<tr>
<td>Specific communication campaigns</td>
<td>18%</td>
<td></td>
<td>35%</td>
<td>33%</td>
<td>11%</td>
</tr>
<tr>
<td>Training programmes for vendors/servers</td>
<td>18%</td>
<td></td>
<td>30%</td>
<td>30%</td>
<td>15%</td>
</tr>
<tr>
<td>Involve more the doctors</td>
<td>17%</td>
<td></td>
<td>43%</td>
<td>29%</td>
<td>6%</td>
</tr>
<tr>
<td>Increase the price of alcoholic beverages</td>
<td>7%</td>
<td></td>
<td>45%</td>
<td>27%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Base: Total Consumers of Alcoholic Drinks n=3018
### Efficient measures to reduce alcohol abuse according to non-drinkers in the total surveyed population

<table>
<thead>
<tr>
<th>Measure</th>
<th>Very efficient</th>
<th>Quite efficient</th>
<th>Not very efficient</th>
<th>Not efficient at all</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education within the family</td>
<td>48%</td>
<td>30%</td>
<td>12%</td>
<td>3%</td>
<td>8%</td>
</tr>
<tr>
<td>Enforce the drink driving laws</td>
<td>47%</td>
<td>23%</td>
<td>18%</td>
<td>5%</td>
<td>7%</td>
</tr>
<tr>
<td>Education at school</td>
<td>35%</td>
<td>35%</td>
<td>17%</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>Enforce the legal purchasing age laws</td>
<td>32%</td>
<td>25%</td>
<td>23%</td>
<td>13%</td>
<td>7%</td>
</tr>
<tr>
<td>Increase the price of alcoholic beverages</td>
<td>27%</td>
<td>24%</td>
<td>26%</td>
<td>15%</td>
<td>9%</td>
</tr>
<tr>
<td>Specific communication campaigns</td>
<td>24%</td>
<td>29%</td>
<td>28%</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Training programmes for vendors/servers</td>
<td>23%</td>
<td>27%</td>
<td>28%</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Involve more the doctors</td>
<td>22%</td>
<td>37%</td>
<td>23%</td>
<td>7%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Base: Total non-drinkers n=977
Efficient measures to reduce alcohol abuse according to people who drink in the Czech Republic

<table>
<thead>
<tr>
<th>Measure</th>
<th>Very efficient</th>
<th>Quite efficient</th>
<th>Not very efficient</th>
<th>Not efficient at all</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education within the family</td>
<td>62%</td>
<td>30%</td>
<td>5%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enforce the drink driving laws</td>
<td>41%</td>
<td>31%</td>
<td>20%</td>
<td>5%</td>
<td></td>
</tr>
<tr>
<td>Enforce the legal purchasing age laws</td>
<td>22%</td>
<td>27%</td>
<td>37%</td>
<td>12%</td>
<td></td>
</tr>
<tr>
<td>Education at school</td>
<td>20%</td>
<td>44%</td>
<td>29%</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Involve more the doctors</td>
<td>11%</td>
<td>31%</td>
<td>43%</td>
<td>10%</td>
<td>3%</td>
</tr>
<tr>
<td>Specific communication campaigns on TV, radio and posters</td>
<td>10%</td>
<td>28%</td>
<td>42%</td>
<td>17%</td>
<td>3%</td>
</tr>
<tr>
<td>Training programs for vendors/servers in shops, bars, etc.</td>
<td>9%</td>
<td>24%</td>
<td>38%</td>
<td>24%</td>
<td>6%</td>
</tr>
<tr>
<td>Increase the price of alcoholic beverages</td>
<td>9%</td>
<td>19%</td>
<td>46%</td>
<td>24%</td>
<td>1%</td>
</tr>
</tbody>
</table>
### Efficient measures to reduce alcohol abuse according to non-drinkers in the Czech Republic

<table>
<thead>
<tr>
<th>Measure</th>
<th>Very efficient</th>
<th>Quite efficient</th>
<th>Not very efficient</th>
<th>Not efficient at all</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education within the family</td>
<td>54%</td>
<td>30%</td>
<td>7%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Enforce the drink driving laws</td>
<td>38%</td>
<td>25%</td>
<td>28%</td>
<td>3%</td>
<td></td>
</tr>
<tr>
<td>Enforce the legal purchasing age laws</td>
<td>21%</td>
<td>23%</td>
<td>35%</td>
<td>14%</td>
<td>7%</td>
</tr>
<tr>
<td>Increase the price of alcoholic beverages</td>
<td>18%</td>
<td>23%</td>
<td>30%</td>
<td>22%</td>
<td>7%</td>
</tr>
<tr>
<td>Education at school</td>
<td>17%</td>
<td>32%</td>
<td>34%</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>Involve more the doctors</td>
<td>11%</td>
<td>29%</td>
<td>38%</td>
<td>8%</td>
<td>13%</td>
</tr>
<tr>
<td>Specific communication campaigns on TV, radio and posters</td>
<td>11%</td>
<td>24%</td>
<td>41%</td>
<td>15%</td>
<td>9%</td>
</tr>
<tr>
<td>Training programs for vendors/servers in shops, bars, etc.</td>
<td>9%</td>
<td>19%</td>
<td>36%</td>
<td>24%</td>
<td>12%</td>
</tr>
</tbody>
</table>

*Base: Total non-drinkers in CZ n=184*
Efficient measures to reduce alcohol abuse according to people who drink in Denmark

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

- **Enforce the drink driving laws**: 41% Very efficient, 32% Quite efficient, 17% Not very efficient, 6% Not efficient at all, 3% Don't know
- **Education at school**: 22% Very efficient, 49% Quite efficient, 23% Not very efficient, 3% Not efficient at all, 3% Don't know
- **Enforce the legal purchasing age laws**: 22% Very efficient, 33% Quite efficient, 29% Not very efficient, 13% Not efficient at all, 3% Don't know
- **Education within the family**: 19% Very efficient, 46% Quite efficient, 23% Not very efficient, 5% Not efficient at all, 7% Don't know
- **Involve more the doctors**: 14% Very efficient, 45% Quite efficient, 27% Not very efficient, 4% Not efficient at all, 9% Don't know
- **Specific communication campaigns on TV, radio and posters**: 13% Very efficient, 36% Quite efficient, 36% Not very efficient, 9% Not efficient at all, 6% Don't know
- **Training programs for vendors/servers in shops, bars, etc.**: 11% Very efficient, 27% Quite efficient, 33% Not very efficient, 17% Not efficient at all, 12% Don't know
- **Increase the price of alcoholic beverages**: 7% Very efficient, 20% Quite efficient, 42% Not very efficient, 27% Not efficient at all, 3% Don't know
### Efficient measures to reduce alcohol abuse according to non-drinkers in Denmark

<table>
<thead>
<tr>
<th>Measure</th>
<th>Very efficient</th>
<th>Quite efficient</th>
<th>Not very efficient</th>
<th>Not efficient at all</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enforce the drink driving laws</td>
<td>45%</td>
<td>25%</td>
<td>13%</td>
<td>5%</td>
<td>12%</td>
</tr>
<tr>
<td>Enforce the legal purchasing age laws</td>
<td>34%</td>
<td>26%</td>
<td>17%</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Increase the price of alcoholic beverages</td>
<td>28%</td>
<td>20%</td>
<td>24%</td>
<td>15%</td>
<td>13%</td>
</tr>
<tr>
<td>Education at school</td>
<td>21%</td>
<td>40%</td>
<td>21%</td>
<td>7%</td>
<td>12%</td>
</tr>
<tr>
<td>Education within the family</td>
<td>20%</td>
<td>37%</td>
<td>22%</td>
<td>4%</td>
<td>17%</td>
</tr>
<tr>
<td>Specific communication campaigns on TV, radio and posters</td>
<td>20%</td>
<td>25%</td>
<td>32%</td>
<td>9%</td>
<td>14%</td>
</tr>
<tr>
<td>Training programs for vendors/servers in shops, bars, etc.</td>
<td>19%</td>
<td>23%</td>
<td>30%</td>
<td>11%</td>
<td>17%</td>
</tr>
<tr>
<td>Involve more the doctors</td>
<td>12%</td>
<td>37%</td>
<td>25%</td>
<td>10%</td>
<td>16%</td>
</tr>
</tbody>
</table>

Base: Total non-drinkers in DK  n=192
## Efficient measures to reduce alcohol abuse according to people who drink in Germany

**Base**: Total Consumers of Alcoholic Drinks in DE  \( n=677 \)

<table>
<thead>
<tr>
<th>Measure</th>
<th>Very efficient</th>
<th>Quite efficient</th>
<th>Not very efficient</th>
<th>Not efficient at all</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education within the family</td>
<td>41%</td>
<td>38%</td>
<td>16%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Education at school</td>
<td>36%</td>
<td>42%</td>
<td>17%</td>
<td>2%</td>
<td></td>
</tr>
<tr>
<td>Enforce the drink driving laws</td>
<td>36%</td>
<td>34%</td>
<td>20%</td>
<td>7% and 2%</td>
<td></td>
</tr>
<tr>
<td>Training programs for vendors/servers in shops, bars, etc.</td>
<td>25%</td>
<td>35%</td>
<td>25%</td>
<td>10% and 5%</td>
<td></td>
</tr>
<tr>
<td>Involve more the doctors</td>
<td>24%</td>
<td>48%</td>
<td>20%</td>
<td>3% and 5%</td>
<td></td>
</tr>
<tr>
<td>Enforce the legal purchasing age laws</td>
<td>21%</td>
<td>30%</td>
<td>29%</td>
<td>17% and 3%</td>
<td></td>
</tr>
<tr>
<td>Specific communication campaigns on TV, radio and posters</td>
<td>15%</td>
<td>33%</td>
<td>35%</td>
<td>13% and 4%</td>
<td></td>
</tr>
<tr>
<td>Increase the price of alcoholic beverages</td>
<td>6%</td>
<td>18%</td>
<td>45%</td>
<td>28% and 3%</td>
<td></td>
</tr>
</tbody>
</table>
## Efficient measures to reduce alcohol abuse according to non-drinkers in Germany

### Base: Total non-drinkers in DE  n=323

<table>
<thead>
<tr>
<th>Measure</th>
<th>Very efficient</th>
<th>Quite efficient</th>
<th>Not very efficient</th>
<th>Not efficient at all</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enforce the drink driving laws</td>
<td>42%</td>
<td>25%</td>
<td>18%</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>Education at school</td>
<td>34%</td>
<td>34%</td>
<td>15%</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>Education within the family</td>
<td>33%</td>
<td>35%</td>
<td>18%</td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>Involve more the doctors</td>
<td>31%</td>
<td>38%</td>
<td>14%</td>
<td>5%</td>
<td>12%</td>
</tr>
<tr>
<td>Enforce the legal purchasing age laws</td>
<td>29%</td>
<td>19%</td>
<td>25%</td>
<td>18%</td>
<td>8%</td>
</tr>
<tr>
<td>Increase the price of alcoholic beverages</td>
<td>28%</td>
<td>21%</td>
<td>25%</td>
<td>18%</td>
<td>9%</td>
</tr>
<tr>
<td>Training programs for vendors/servers in shops, bars, etc.</td>
<td>27%</td>
<td>30%</td>
<td>26%</td>
<td>7%</td>
<td>11%</td>
</tr>
<tr>
<td>Specific communication campaigns on TV, radio and posters</td>
<td>18%</td>
<td>27%</td>
<td>30%</td>
<td>14%</td>
<td>11%</td>
</tr>
</tbody>
</table>
Efficient measures to reduce alcohol abuse according to people who drink in Portugal

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

<table>
<thead>
<tr>
<th>Measure</th>
<th>Very efficient</th>
<th>Quite efficient</th>
<th>Not very efficient</th>
<th>Not efficient at all</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Education within the family</td>
<td>82%</td>
<td>15%</td>
<td>3%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education at school</td>
<td>66%</td>
<td>31%</td>
<td>3%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enforce the drink driving laws</td>
<td>53%</td>
<td>34%</td>
<td>10%</td>
<td></td>
<td>3%</td>
</tr>
<tr>
<td>Specific communication campaigns on TV, radio and posters</td>
<td>37%</td>
<td>45%</td>
<td>16%</td>
<td></td>
<td>2%</td>
</tr>
<tr>
<td>Enforce the legal purchasing age laws</td>
<td>32%</td>
<td>39%</td>
<td>21%</td>
<td></td>
<td>8%</td>
</tr>
<tr>
<td>Training programs for vendors/servers in shops, bars, etc.</td>
<td>31%</td>
<td>33%</td>
<td>25%</td>
<td></td>
<td>8%</td>
</tr>
<tr>
<td>Involve more the doctors</td>
<td>20%</td>
<td>48%</td>
<td>26%</td>
<td></td>
<td>4%</td>
</tr>
<tr>
<td>Increase the price of alcoholic beverages</td>
<td>4%</td>
<td>19%</td>
<td>45%</td>
<td></td>
<td>30%</td>
</tr>
</tbody>
</table>

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

Base: Total non-drinkers in PT  n=279

- **Education within the family**: 78% Very efficient, 19% Not very efficient, 1% Don’t know
- **Enforce the drink driving laws**: 60% Very efficient, 20% Not very efficient, 13% Not efficient at all, 7% Don’t know
- **Education at school**: 57% Very efficient, 33% Not very efficient, 4% Don’t know
- **Specific communication campaigns on TV, radio and posters**: 42% Very efficient, 36% Not very efficient, 16% Not efficient at all, 4% Don’t know
- **Enforce the legal purchasing age laws**: 42% Very efficient, 33% Not very efficient, 17% Not efficient at all, 6% Don’t know
- **Training programs for vendors/servers in shops, bars, etc.**: 30% Very efficient, 33% Not very efficient, 23% Not efficient at all, 11% Don’t know
- **Increase the price of alcoholic beverages**: 30% Very efficient, 30% Not very efficient, 25% Not efficient at all, 9% Don’t know
- **Involve more the doctors**: 25% Very efficient, 41% Not very efficient, 21% Not efficient at all, 6% Don’t know

Alcohol price and consumer behaviour
The Brewers of Europe / April 2009

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Conclusions
Taste, occasion and mood are the first criteria of choice

- For 8 consumers in 10, taste of the drinks, occasion of consumption and their mood at that moment determine the choice of alcoholic drinks.

- For only 6% of consumers, price is the first criterion of choice. There are no significant differences by age group.

- Consumers in all 4 countries have similar profiles in terms of criteria of choice.

- The most typical occasions when alcoholic drinks are consumed for more than 7 consumers in 10 are social events outside the home: parties/outdoor events, special occasions, when out with friends.
For a majority of people, a price increase would not affect their overall level of alcohol consumption

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

- A price increase has the biggest impact on the people who alcohol policies should not be targeting and has the smallest impact on the target problem.

- A price increase would hit the light and moderate consumers’ consumption levels most, whilst the regular irresponsible and regular binge drinkers are much more likely than the average consumer to just change their purchasing behaviour.

- A price increase can affect all categories of consumers, yet:
  - Only 1.8% of Europeans fall into the category of being regular irresponsible consumers who would drink less in general as a result.
  - Only 1.65% of Europeans are regular binge drinkers who would drink less in general as a result.
A price increase would have a different impact according to the country

- Only 18% of Danes and 24% of Czechs, but 34% of Germans and 47% of Portuguese would drink less in general if the price of all alcoholic drinks were to increase.

- Whatever the countries though, it is the binge drinkers and the regular irresponsible consumers who are generally most likely to drink the same or simply change their purchasing behaviour to get round the issue.

- In Denmark, for example, 59% of all the consumers interviewed would drink the same, but 81% of regular irresponsible consumers would either just drink the same or simply change their purchasing behaviour.
General negative attitude towards a price increase

- For more than 90% of consumers, price policies do not tackle the real problem: alcohol abuse. Instead, it is perceived as unfair towards those who drink responsibly (84%). In addition, it limits people’s freedom of choice (94%).

- Similar attitude patterns are observed in all 4 countries.

- Only 32% of Europeans think that the increase of price of alcoholic beverages could be efficient to reduce alcohol abuse, but twice as many people think it wouldn’t be efficient. 24% think pricing policy is even not efficient at all.

- Instead, for more than 80% of people, education within the family would be the most efficient measure. Other efficient measures are education at school (75%) and enforcing the drink driving laws (74%).
Appendix: questionnaire
D1. You are:
   1. Male
   2. Female

D2. How old are you?
1. 18-25 years old
2. 26-34 years old
3. 35-54 years old
4. 55 years old and more

D3. What is your family status?
1. Single
2. In partnership
3. Married

D4. Do you have any children?
1. Yes
2. No

D5. What is the monthly net (post-tax) income of your household?
1. Less than 1.000 €
2. Between 1.000 and 1.500 €
3. Between 1.500 and 3.000 €
4. Between 3.000 and 5.000 €
5. More than 5.000 €
6. Don’t know/Don’t want to answer

D6. In which region do you live?
### Consumption habits

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

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

<table>
<thead>
<tr>
<th></th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Beer</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>2</td>
<td>Cider</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>3</td>
<td>Champagne Sparkling wine</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>4</td>
<td>Wine</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>5</td>
<td>Spirits</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>6</td>
<td>Pre-mixed drinks (e.g. alcohol with soda)</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

7 ☐ I don’t drink alcoholic drinks ➔ Q. 10
2) In the last 30 days, how often did you drink the following alcoholic drinks?
One single answer by column

<table>
<thead>
<tr>
<th></th>
<th>Beer</th>
<th>Cider</th>
<th>Champagne / Sparkling Wine</th>
<th>Wine</th>
<th>Spirits</th>
<th>Pre-mixed drink</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Daily</td>
<td>1.☐</td>
<td>1.☐</td>
<td>1.☐</td>
<td>1.☐</td>
<td>1.☐</td>
<td>1.☐</td>
</tr>
<tr>
<td>2 4-5 times a week</td>
<td>2.☐</td>
<td>2.☐</td>
<td>2.☐</td>
<td>2.☐</td>
<td>2.☐</td>
<td>2.☐</td>
</tr>
<tr>
<td>3 2-3 times a week</td>
<td>3.☐</td>
<td>3.☐</td>
<td>3.☐</td>
<td>3.☐</td>
<td>3.☐</td>
<td>3.☐</td>
</tr>
<tr>
<td>4 Once a week</td>
<td>4.☐</td>
<td>4.☐</td>
<td>4.☐</td>
<td>4.☐</td>
<td>4.☐</td>
<td>4.☐</td>
</tr>
<tr>
<td>5 2-3 times a month</td>
<td>5.☐</td>
<td>5.☐</td>
<td>5.☐</td>
<td>5.☐</td>
<td>5.☐</td>
<td>5.☐</td>
</tr>
<tr>
<td>6 Once</td>
<td>6.☐</td>
<td>6.☐</td>
<td>6.☐</td>
<td>6.☐</td>
<td>6.☐</td>
<td>6.☐</td>
</tr>
<tr>
<td>7 Not at all</td>
<td>7.☐</td>
<td>7.☐</td>
<td>7.☐</td>
<td>7.☐</td>
<td>7.☐</td>
<td>7.☐</td>
</tr>
</tbody>
</table>

In German, beer must include beer mixes (Biermischgetränke)

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

<table>
<thead>
<tr>
<th></th>
<th>Beer (25cl or 33cl)</th>
<th>Cider</th>
<th>Champagne / Sparkling</th>
<th>Wine</th>
<th>Spirits</th>
<th>Pre-mixed drink</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Less than one drink</td>
<td>1.☐</td>
<td>1.☐</td>
<td>1.☐</td>
<td>1.☐</td>
<td>1.☐</td>
<td>1.☐</td>
</tr>
<tr>
<td>2 1 drink/glass</td>
<td>2.☐</td>
<td>2.☐</td>
<td>2.☐</td>
<td>2.☐</td>
<td>2.☐</td>
<td>2.☐</td>
</tr>
<tr>
<td>3 2 drinks/glasses</td>
<td>3.☐</td>
<td>3.☐</td>
<td>3.☐</td>
<td>3.☐</td>
<td>3.☐</td>
<td>3.☐</td>
</tr>
<tr>
<td>4 3 drinks/glasses</td>
<td>4.☐</td>
<td>4.☐</td>
<td>4.☐</td>
<td>4.☐</td>
<td>4.☐</td>
<td>4.☐</td>
</tr>
<tr>
<td>5 4 drinks/glasses</td>
<td>5.☐</td>
<td>5.☐</td>
<td>5.☐</td>
<td>5.☐</td>
<td>5.☐</td>
<td>5.☐</td>
</tr>
<tr>
<td>6 5 drinks/glasses</td>
<td>6.☐</td>
<td>6.☐</td>
<td>6.☐</td>
<td>6.☐</td>
<td>6.☐</td>
<td>6.☐</td>
</tr>
<tr>
<td>7 5 drinks/glasses or more</td>
<td>7.☐</td>
<td>7.☐</td>
<td>7.☐</td>
<td>7.☐</td>
<td>7.☐</td>
<td>7.☐</td>
</tr>
<tr>
<td>8 Don't know/Refusal</td>
<td>8.☐</td>
<td>8.☐</td>
<td>8.☐</td>
<td>8.☐</td>
<td>8.☐</td>
<td>8.☐</td>
</tr>
</tbody>
</table>
4) How often do you drink 5 or more drinks in a short period of time, e.g. a couple of hours?

**One single answer**

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

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

**You can choose several answers**

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

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

One single answer

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

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

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

One single answer

1) The taste
2) The alcohol strength
3) The occasion
4) The price
5) The brand image
6) The weather
7) Your mood at that moment
8) The origin or appellation
9) As refreshment
10) Other
Show the same list as in Q.6a, except the items chosen in Q.6a and Q. 6b

6c) What is your third criterion of choice when buying alcohol?

One single answer

1) The taste
2) The alcohol strength
3) The occasion
4) The price
5) The brand image
6) The weather
7) Your mood at that moment
8) The origin or appellation
9) As refreshment
10) Other
7) If the price of all drinks were to increase by 25%, would you most likely?
One single answer
1) Drink less in general
2) Drink less often
3) Drink the same
4) Drink less often on weekdays but the same at weekends
5) Drink the same but switch to products that were previously cheaper
6) Drink the same amount but switch to another alcoholic drinks category
7) Buy more in shops and less in the on-trade such as pubs, bars, restaurants, clubs
8) Bring back more / cheaper alcoholic drinks from abroad
9) Consume more home-produced alcoholic beverages
10) Other

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

<table>
<thead>
<tr>
<th></th>
<th>Totally agree</th>
<th>Tend to agree</th>
<th>Tend to disagree</th>
<th>Totally disagree</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. I don’t want to pay more for my alcoholic drinks just because some people drink irresponsibly</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B. I should be trusted to make my own decisions about how much I drink</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. Alcohol abuse is the problem not the drinks themselves</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
10) To what extent can the following measures play an efficient role to help reduce alcohol abuse?

One single answer by column

<table>
<thead>
<tr>
<th>Measure</th>
<th>Very efficient</th>
<th>Quite efficient</th>
<th>Not very efficient</th>
<th>Not efficient at all</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Involve more the doctors who are best placed to advise their patients</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>B. Education at school</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C. Education within the family</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D. Increase the price of alcoholic beverages</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E. Enforce the legal purchasing age laws</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F. Enforce the drink driving laws</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>G. Specific communication campaigns on TV, radio and posters</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>H. Training programs for vendors/servers in shops, bars, restaurants, clubs etc.</td>
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"As a corporate socially responsible company, Ipsos adheres to the United Nations Global Compact principles."

The UN Global Compact's 10 principles in the areas of human rights, labour, the environment and anti-corruption enjoy universal consensus and are derived from:
- The Universal Declaration of Human Rights
- The International Labour Organization's Declaration on Fundamental Principles and Rights at Work
- The Rio Declaration on Environment and Development
- The United Nations Convention Against Corruption
- The Global Compact asks companies to embrace, support and enact, within their sphere of influence, a set of core values in the areas of human rights, labour standards, the environment, and anti-corruption:

Human Rights

- Principle 1: Businesses should support and respect the protection of internationally proclaimed human rights; and
- Principle 2: make sure that they are not complicit in human rights abuses.

Labour Standards

- Principle 3: Businesses should uphold the freedom of association and the effective recognition of the right to collective bargaining;
- Principle 4: the elimination of all forms of forced and compulsory labour;
- Principle 5: the effective abolition of child labour; and
- Principle 6: the elimination of discrimination in respect of employment and occupation.

Environment

- Principle 7: Businesses should support a precautionary approach to environmental challenges;
- Principle 8: undertake initiatives to promote greater environmental responsibility; and
- Principle 9: encourage the development and diffusion of environmentally friendly technologies.

Anti-Corruption

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