



CONSUMER INSIGHTS

KNOWLEDGE OF INGREDIENT AND NUTRITION
INFORMATION OF ALCOHOLIC BEVERAGES

OFF-LABEL INFORMATION AND ITS USE

Report

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1. Executive summary

This report provides an analysis of European consumers' information needs and preferences regarding alcoholic beverages. The results show that whilst consumers' knowledge of the nutritional value and ingredient information of alcoholic beverages is very limited, there is interest to receive this kind of information, and an interest in accessing it through off-label channels such as websites and applications.

The Knowledge Gap in Europe

Although most European adults confirm that they consume alcohol, the majority of the 5,395 respondents under study demonstrated a limited knowledge of the nutritional values and ingredients of alcoholic beverages. It is to be noted, however, that there is a relatively high knowledge with regard to the most common ingredients of some alcoholic beverages (beer and wine).

These results indicate that consumers have a knowledge deficit of the carbohydrate, calorie and fat content of the different types of alcoholic beverages studied (beer, wine and spirits), and of the different ingredients that can be used in their production.

Many of those surveyed misjudged the impact of different drinks on their diet (many incorrectly believed some alcoholic beverages to have a higher calorie content than others, for example), which could be linked to their knowledge gap.

Interest in Product Information

The majority of consumers agreed that the same nutritional and ingredient information should be provided for all food and drink products. However, this is currently not the case, as European law exempts alcoholic beverages above 1.2% alcohol content from any obligation to provide consumers with a list of ingredients or nutritional declaration of food products.

Off-label Information Sources

This report also considered attitudes towards and use of off-label sources of product information, including websites, applications, and advertising, as well as their consumers' trust in these sources.

The study indicates that off-label sources are already being used to a certain extent and that information provided off-line can extend the information that is available on-label. Interest in using these platforms to access nutrition and ingredient information on alcoholic beverages ranged from 36-53%, although the degree to which consumers trust and prefer different types of off-label sources varies considerably. For example, the majority were predisposed towards using in-store communication and websites rather than applications or advertisements.

The Digital Era and Changing Consumer Needs

Consumers' interest in accessing product information through off-label sources falls against the backdrop of the digitisation of everyday life in Europe. The region is home to the highest rate of mobile and Internet penetration across the globe, and purchases are increasingly conducted via multiple devices, including computers, smartphones and tablets.

In summary, European consumers display a limited knowledge of nutritional and ingredient information of alcoholic beverages. Nevertheless, the majority agree that food and drink products should offer the same nutrition and ingredient labelling, regardless of whether they contain alcohol or not.

On the basis of these results, alternative ways of providing consumers with product information could be a fruitful topic for further analysis.

2. Introduction

This report focuses on the insight study that examined the information desires of consumers, the ways in which consumers of alcoholic beverages regard the information on nutrition values and ingredients via various information sources, and which information sources can be used to access information on nutrition values and ingredients.

The study was commissioned by 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 EU institutions and international organisations. Current members are the national brewers' associations from 26 EU Member States, plus Norway, Switzerland and Turkey. Further information can be accessed at: www.brewersofeurope.org.

The study was conducted and results were analysed by GfK Belgium. The GfK Group is one of the largest market research companies in the world. They deliver knowledge on markets and sectors that are needed to make business and policy decisions. Within the GfK group, a special unit at GfK Belgium has been developed to handle and coordinate centrally requests for pan-European and international studies within the sectors of Public and Professional services.

The goal of this insight study involved 3 main research topics:

1. Nutrition and ingredient knowledge
2. Interest in nutrition and ingredient information on alcoholic beverages
3. Accessing nutrition and ingredient information off-label

Nutrition and ingredient knowledge is the first subject of this study and centres on the factual knowledge of consumers regarding nutrition values and ingredients. Research questions posed include: Do consumers know what ingredients beer, wine and spirits could be composed of? Do consumers know the nutrition content of beer, wine and spirits?

Second, interest in nutrition and ingredient information for alcoholic beverages was investigated. This refers to the question of whether consumers would like to see the same information provided for alcoholic beverages as is currently available on food and drink products.

Finally, the third research topic in this report regards the off-label information sources that consumers can use to access information on nutrition and ingredients. Aside from their use in practice, research topics consider the following: What kind of off-label information are consumers interested in? What kind of off-label information do consumers prefer? What kind of off-label information is most trusted by consumers?

3. Approach

An online survey in six different countries was organised by GfK Belgium in April 2014. **The widespread use of Internet** across all EU countries means that online surveys are increasingly considered a robust representation of the general public.

The consumer insight survey was conducted in six EU countries that are considered representative of the European Union and its different regions, ensuring a balanced geographical spread. These six EU countries were Germany, Poland, Denmark, the Netherlands, Spain and the United Kingdom. A random sampling approach was applied and in total, 5,395 respondents were surveyed. The number of respondents per country is presented in the figure below.

Figure 1 Sample size per country under study

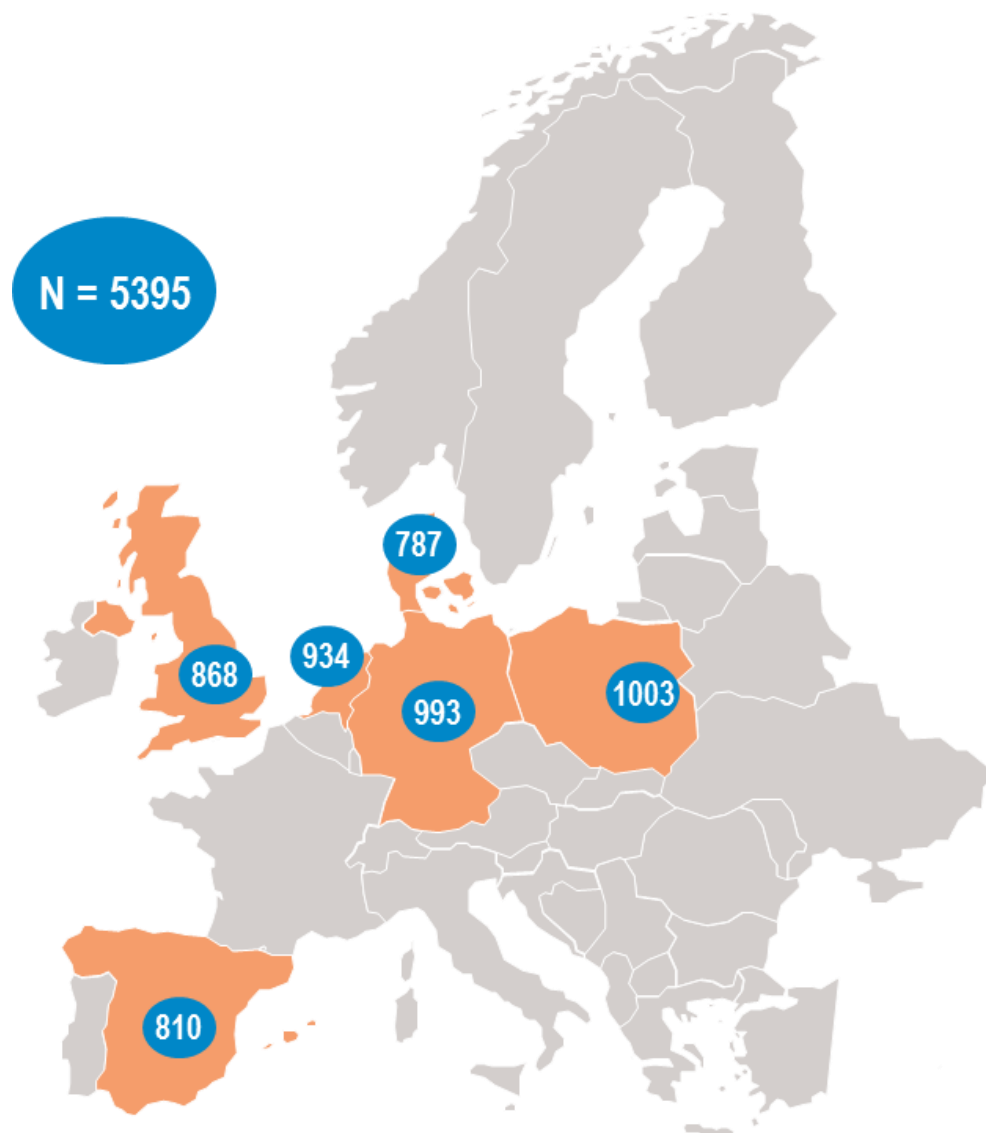


Table 1: Sample by country under study

| | DK | DE | UK | ES | NL | PL |
|--|-----|-----|-----|-----|-----|------|
| Sample (N) | 787 | 993 | 868 | 810 | 934 | 1003 |
| Gender | | | | | | |
| Male | 51% | 51% | 46% | 56% | 46% | 51% |
| Female | 49% | 49% | 54% | 44% | 54% | 49% |
| Age Groups | | | | | | |
| 18 – 25 | 16% | 17% | 14% | 22% | 20 | 19 |
| 26 – 35 | 14% | 23% | 23% | 26% | 15 | 20 |
| 36 – 45 | 16% | 20% | 26% | 27% | 19 | 21 |
| 46 – 55 | 24% | 21% | 22% | 18% | 22 | 20 |
| 56 – 65 | 30% | 20% | 16% | 8% | 25 | 21 |
| Education | | | | | | |
| No education completed (ISCED 0) | 3% | 2% | 1% | 1% | 2% | 1% |
| Primary education (ISCED 1) | 1% | 6% | 2% | 4% | 3% | 2% |
| Lower secondary education (ISCED 2) | 18% | 16% | 5% | 12% | 13% | 3% |
| Upper secondary education (ISCED 3) | 43% | 29% | 30% | 29% | 17% | 36% |
| Post-secondary including pré-vocational or vocational education but not tertiary (ISCED 4) | 22% | 23% | 25% | 13% | 53% | 18% |
| Tertiary education –first level (ISCED 5) | 11% | 22% | 23% | 37% | 7% | 17% |
| Tertiary education – advanced level (ISCED 6) | 1% | 2% | 15% | 4% | 5% | 24% |
| Children | | | | | | |
| Yes | 25% | 36% | 47% | 49% | 32% | 47% |
| No | 75% | 64% | 53% | 51% | 68% | 53% |

The population under study was the general public between 18 and 65 years old. From 18 years old onwards, consumers are allowed to buy any type of alcoholic beverage (including spirits) in these six countries. The data was made representative by means of weighting on country (equal weights), age groups and gender. For this, Eurostat data was taken as a point of reference.

3.1. EU policy background¹

With regard to the information concerning nutritional values and ingredients, the European Union emphasises the need for action to inform and educate the consumer. Labelling of alcoholic beverage packaging is one means of helping consumers to make informed decisions about their consumption of alcoholic beverages. Alcoholic beverages, apart from in some countries and some alcoholic beverages, do not provide the list of ingredients and the nutritional declaration to consumers. This historical fact is considered in an overview of the existing legislation.

European food information policies were first initiated in 1979 when the European Commission issued Directive 79/112/EEC on the approximation of the laws of the Member States relating to the labelling, presentation and advertising of foodstuffs for sale to the ultimate consumer. In 1987, the European

¹ Acknowledgements go to RAND Europe

Commission issued Directive 87/250/EEC on the indication of alcoholic strength by volume in the labelling of alcoholic beverages for sale to the consumer. Labels of alcoholic beverages were obliged to include an indicative message of alcoholic strength by volume when beverages contained more than 1.2% by volume of alcohol.²

Later, several EU Member States introduced mandatory labelling on a variety of issues. Labels of alcoholic beverages also contained additional information provided by manufacturers or information required by countries outside of the EU, for example the US. In addition, under platforms such as the European Alcohol and Health Forum, manufacturers undertook voluntary agreements on labelling. The provision of other information thus varied across countries and amongst manufacturers.

The Commission White Paper of 30 May 2007 on a Strategy for Europe on Nutrition, Overweight and Obesity related health issues highlighted nutrition messaging as one way to better inform consumers and ensure that information is available to support healthy decision-making in relation to the purchasing of food and drink.³ More recently in 2011, this Paper was superseded by Regulation No 1169/2011 on the provision of food information to consumers.⁴

In conclusion, alcoholic beverages of more than 1.2% alcohol by volume remain exempt from any obligation to provide a list of ingredients and a nutrition declaration containing information on energy content and the amounts of fat, saturates, carbohydrate, sugars, protein and salt contained, which are required for other food products.

4. Results

The subject of this study is the nutritional values and ingredients of alcoholic beverages. There have been several policies in the European Union to govern food information provided to consumers. These policies also apply to alcoholic beverages, although alcoholic beverages of more than 1.2% alcohol by volume form an exception, as they are not obliged to provide the nutrition declaration and ingredients list (although specific regulations apply to beer in some countries) to consumers.

In what follows, we consider the following:

- Knowledge of nutritional values and ingredients of alcoholic beverages
- Interest in receiving the same nutrition and ingredient information for all food and drink products (incl. alcoholic beverages)
- Use of and attitudes towards off-label information sources of nutrition values and ingredients

² European Commission. Commission Directive 87/250/EEC (15 April 1987) On the indication of alcoholic strength by volume in the labelling of alcoholic beverages for sale to the ultimate consumer. Off J Europ Comm. 1987; 113:57-58.

³ Commission of the European Communities. White Paper on A Strategy for Europe on Nutrition, Overweight and Obesity related health issues. Brussels. 2007.

⁴ European Parliament and European Council. Regulation (EU) No 1169/2011 of 25 October 2011 on the provision of food information to consumers.

4.1. Knowledge of nutritional values and ingredients of alcoholic beverages

In the context of the insight survey, respondents were asked questions regarding their knowledge of the nutritional values of alcoholic beverages and other food products, and the products that could be used in the production of alcoholic beverages (hereafter referred to as 'ingredients'⁵).

4.1.1. Knowledge of nutritional values

The most general question posed was: *How many calories per day (in kcal) do you think an average woman/man needs?* Men can consume 2500 kcal per day and women 2000 kcal per day.

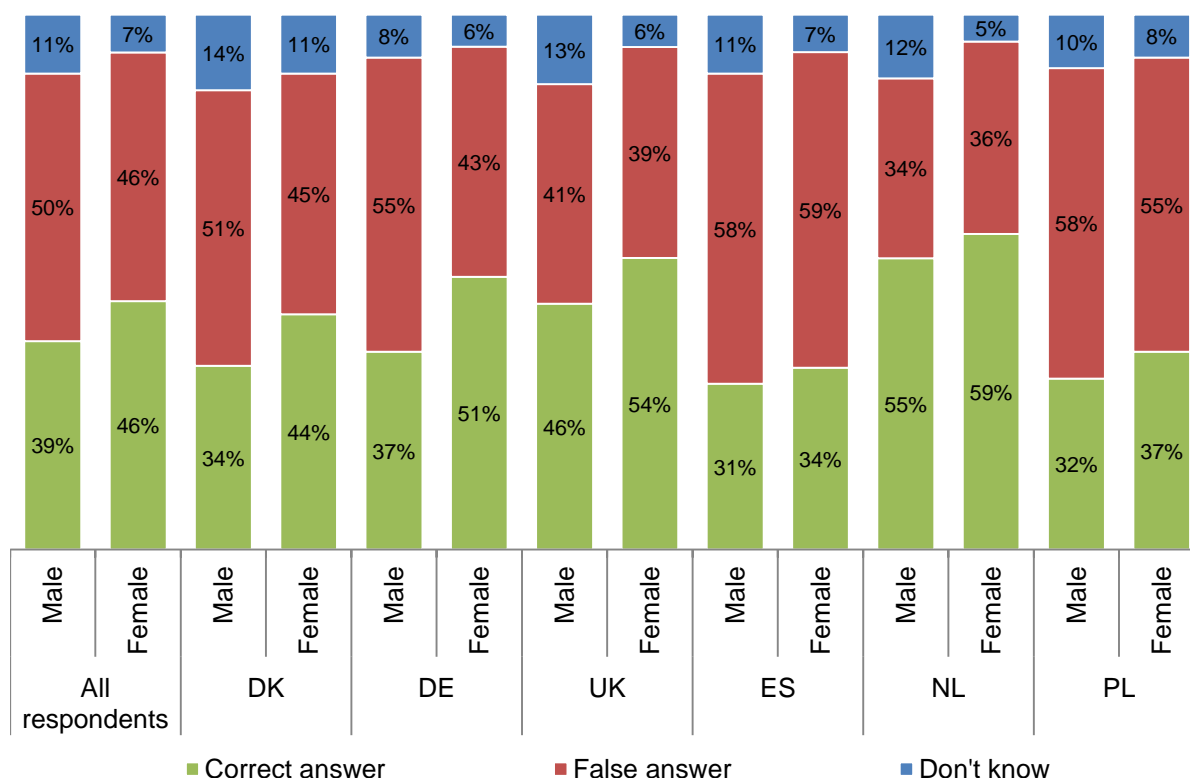
In Figure 2, the results are presented by gender. The answers to the question regarding the amount of calories per day a man needs is presented for the group of male respondents, the answers to the question regarding the amount of calories per day a woman needs is presented for the group of female respondents.

Overall, 39% of the male respondents answered correctly that men can consume 2500 kcal per day and 46% of the female respondents answered correctly that women can consume 2000 kcal per day.

When we consider these answers at country level, we see similarities and differences. Female respondents in all countries have a somewhat better knowledge than male respondents when considering the amount of calories one can consume per day. Respondents from the Netherlands know more often how many calories they can consume per day, while respondents in Spain and Poland know less often how many calories they can consume per day.

⁵ Please note that the term "ingredients" in this report does not refer to "ingredients" as defined in Regulation 1169/2011

Figure 2 Knowledge regarding the amount of calories an average adult can consume per day. Answer to the question: “How many calories per day (in kcal) do you think an average adult (male/female) needs?”



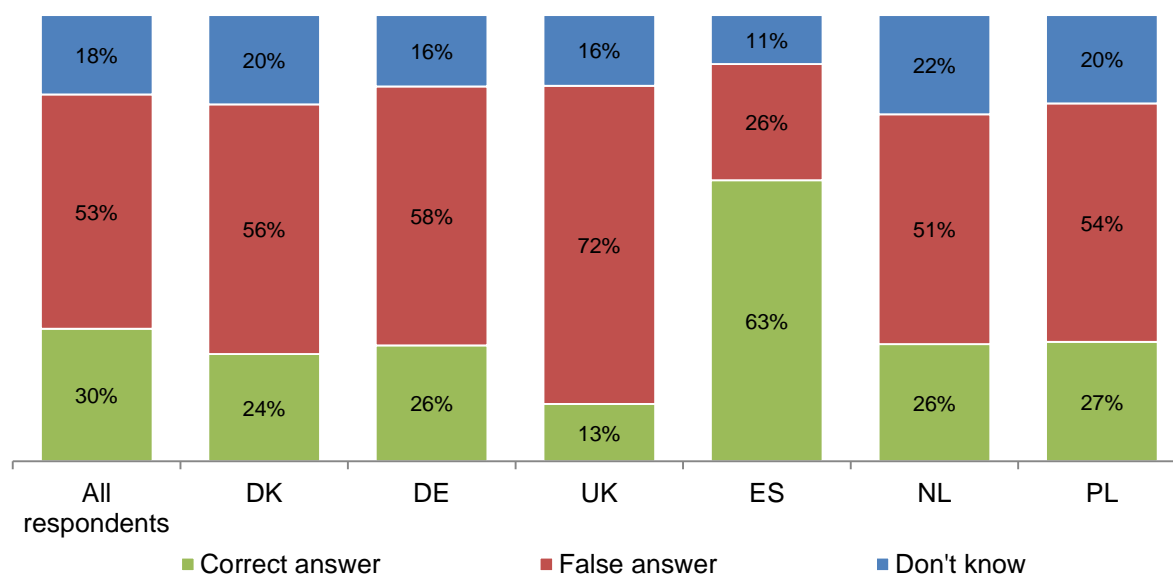
Note: Question: How many calories per day (in kcal) do you think an average adult needs? Please indicate separate answers for women and men. **Answer categories:** 1. 1000 kcal, 2. 1500 kcal, 3. 2000 kcal, 4. 2500 kcal, 5. 3000 kcal, 6. 3500 kcal, 7. 4000 kcal, 8. I don't know. **Correct answer for males:** 4, **correct answer for females:** 3. **N** = 5.395.

In Figure 3, another knowledge question regarding calories is reported upon. In this question, different types of beverages of the same volume (i.e. 100ml) are compared and the question is posed which beverage has the most calories for the same volume.

Three out of ten respondents knew that spirits contained the highest number of calories compared to orange juice, alcohol-free beer, regular beer, and wine. Around a fifth of the respondents were not sure of the right answer. Just over half of respondents thought incorrectly that another beverage than spirits had more calories for the same amount of volume.

At the country level, around a fourth of the respondents in the Netherlands, Denmark, Germany and Poland answered this question correctly. Spanish respondents knew most often that spirits contain the most calories for the same volume. Contrary, respondents in the UK were least likely to answer correctly that spirits contained the most calories for the same volume.

Figure 3 Knowledge regarding the amount of calories in different beverages. Answer to the question: “Which beverage contains the most calories for the same volume?”



Note: Question: Which one of the following beverages has the most calories for the same volume? **Answer categories:** 1. Orange juice (freshly squeezed orange juice), 2. Alcohol-free beer (less than 1% alcohol), 3. Regular beer (between 4.5% and 5.5% alcohol), 4. Wine (red or white wine), 5. Spirits (e.g. whiskey, vodka, gin, rum), 6. Not sure. **Correct answer:** 5, N = 5.395.

A set of different knowledge questions was posed that related to the nutrition values within different alcoholic beverages.

The results of the knowledge questions regarding calories within different alcoholic beverages are presented in Table 2, in which the correct answers are indicated in bold and in italic. With regard to calories, alcohol-free beer and regular beer contain less than 50 kcal per 100ml. This was the lowest possible answer, which meant that for calories, the majority of respondents overestimated the number of calories in beer. This is particularly the case for regular beer, where we see that the majority of those surveyed overestimated the number of calories in 100ml. Both white and red wine have between 51 and 100 calories per 100ml. The majority of respondents overestimated the number of calories in wine, and thus only a limited proportion underestimates the amount of calories in wine. Finally, the number of calories in whiskey lies between 201 and 250 kcal per 100ml. Most respondents underestimated the amount of calories in whiskey. The difference between overestimation and underestimation can be caused by the number of answer categories that overestimate the correct amount and underestimate the correct amount of calories. Because of this, we do not further report or draw conclusions on the differences between underestimating and overestimating the amount of calories, fat or carbohydrates within alcoholic beverages.

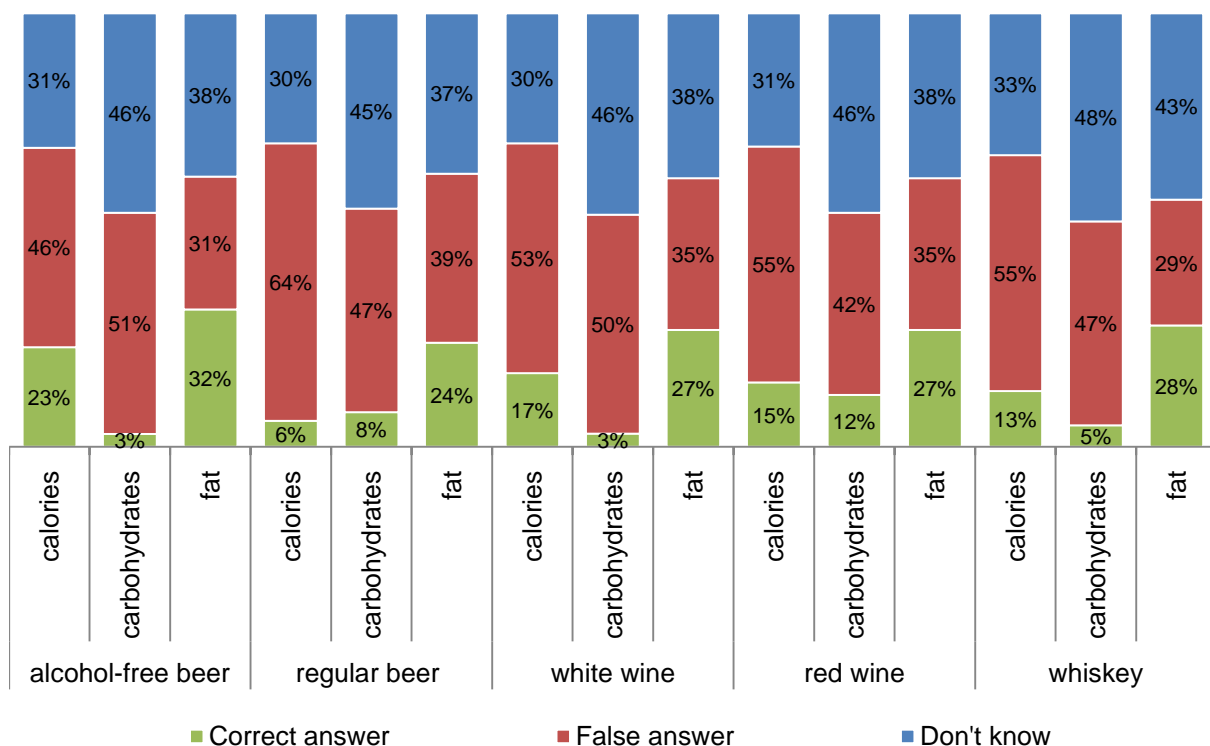
Table 2 Knowledge regarding the amount of calories in different beverages. Answer to the question: “How many calories (in kcal) do you think are provided by each of the following products?”

| | < 50 kcal | 51-100 kcal | 101-150 kcal | 151-200 kcal | 201-250 kcal | 251-300 kcal | > 300 kcal | I don't know |
|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|------------|--------------|
| Alcohol-free beer | 23,2% | 17,6% | 11,8% | 7,3% | 4,6% | 2,7% | 2,0% | 30,8% |
| Regular beer | 5,7% | 18,0% | 14,9% | 12,1% | 8,8% | 5,5% | 4,5% | 30,3% |
| White wine | 7,2% | 16,8% | 18,9% | 12,3% | 7,3% | 4,3% | 2,8% | 30,4% |
| Red wine | 6,3% | 14,8% | 16,8% | 13,6% | 8,9% | 6,0% | 3,0% | 30,7% |
| Whiskey | 5,7% | 9,0% | 11,2% | 12,1% | 12,5% | 8,7% | 8,2% | 32,6% |

Note: The correct answers are indicated in bold and in italic. **Question:** How many calories (in kcal) do you think are provided by each of the following products? 1x1. 100ml of alcohol-free beer (less than 1% alcohol), 1x2. 100ml of regular beer (between 4.5% and 5.5% alcohol), 1x3. 100ml of white wine, 1x4. 100ml of red wine, 1x5. 100ml of whiskey. **Answer categories:** 1. < 50 kcal, 2. 51-100 kcal, 3. 101-150 kcal, 4. 151-200 kcal, 201-250 kcal, 5. 251-300 kcal, 6. > 300 kcal, 7. I don't know. **Correct answers:** 1x1. 1, 1x2. 1, 1x3. 2, 1x4. 2, 1x5. 5. N = 5.395.

Figure 4 reports on the different knowledge questions that relate to the percentage of respondents who answer correctly how many calories, how many grams of carbohydrates and how many grams of fat different alcoholic beverages of 100ml contain.

Figure 4 Knowledge regarding the amount of calories, carbohydrates and fat in different alcoholic beverages.



Note: Question 1: How many calories (in kcal) do you think are provided by each of the following products? 1x1. 100ml of alcohol-free beer (less than 1% alcohol), 1x2. 100ml of regular beer (between 4.5% and 5.5% alcohol), 1x3. 100ml of white wine, 1x4. 100ml of red wine, 1x5. 100ml of whiskey. **Answer categories question 1:** 1. < 50 kcal, 2. 51-100 kcal, 3. 101-150 kcal, 4. 151-200 kcal, 201-250 kcal, 5. 251-300 kcal, 6. > 300 kcal, 7. I don't know. **Correct answers question 1:** 1x1. 1, 1x2. 1, 1x3. 2, 1x4. 2, 1x5. 5. **Question 2:** How many grams of carbohydrates do you think are in the following products? 2x1. 100ml of alcohol-free beer (less than 1% alcohol), 2x2. 100ml of regular beer (between 4.5% and 5.5% alcohol), 2x3. 100ml of white wine, 2x4. 100ml of red wine, 2x5. 100ml of whiskey. **Answer categories question 2:** 1. 0.0g, 2. 0.1 - 1.0g, 3. 1.1 - 2.0g, 4. 2.1 - 3.0g, 5. 3.1 - 4.0g, 6. 4.1 - 5.0g, 7. More than 5.0g, 8. Do not know/not sure. **Correct answers question 2:** 2x1. 7, 2x2. 5, 2x3. 7, 2x4. 4, 2x5. 5. **Question 3:** How many grams of fat do you think are in the following products? 3x1. 100ml of alcohol-free beer (less than 1% alcohol), 3x2. 100ml of regular beer (between 4.5% and 5.5% alcohol), 3x3. 100ml of white wine, 3x4. 100ml of red wine, 3x5. 100ml of whiskey. **Answer categories question 3:** 1. 0.0g, 2. 0.1 - 5.0g, 3. 5.1 - 10.0g, 4. More than 10.0g, 5. Do not know/Not sure. **Correct answers question 3:** 3x1. 1, 3x2. 1, 3x3. 1, 3x4. 1, 3x5. 1, N = 5.395.

The figure shows that knowledge regarding nutritional values of all 5 types of alcoholic beverages surveyed is limited, but varies per type of nutrition value. Respondents are most likely to know the correct amount of fat in each type of alcoholic beverage (correct answers per alcoholic beverage vary

between 24% and 32%). Respondents are least likely to know the correct amount of carbohydrates in each type of alcoholic beverage (correct answers per alcoholic beverage vary between 3% and 12%).

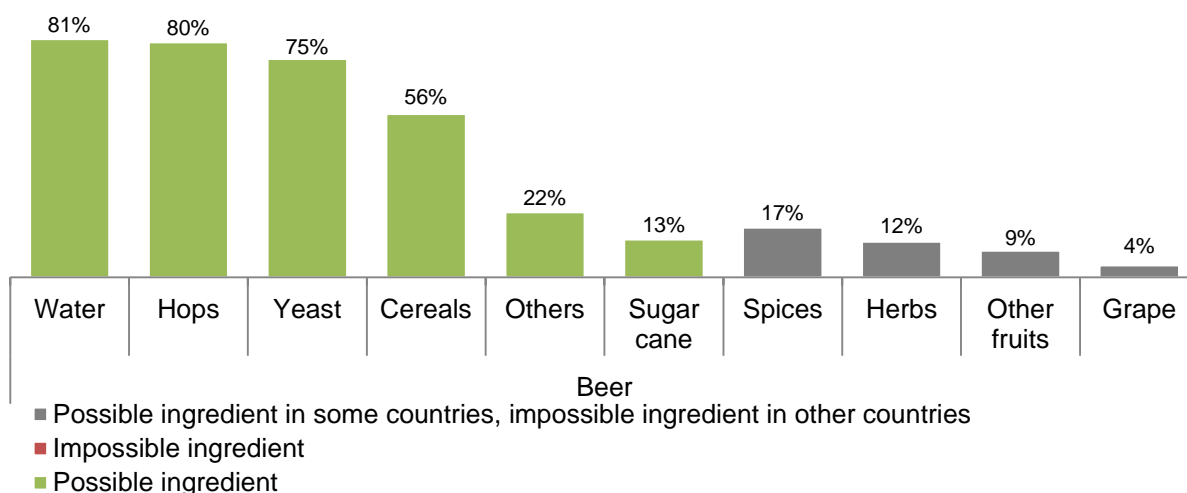
The majority of consumers therefore do not know the number of calories, carbohydrates and fat in alcoholic beverages.

There is no clear pattern of knowledge of different nutritional values. Knowledge regarding a specific type of alcoholic beverage is not always higher than that of another type of alcoholic beverage. For instance, knowledge of calories and fat content is lower for regular beer compared to alcohol-free beer, yet knowledge of carbohydrates is higher for regular beer compared to alcohol-free beer.

4.1.2. Knowledge of ingredients

With regard to ingredients, we asked respondents to indicate the main ingredients per type of alcoholic beverage. The percentages of consumers stating that the product may be used as an ingredient is stated in each bar, in the following figures, irrespective of whether the answer is correct or not. Correct answers are indicated in green and incorrect answers in red. The grey bars show ingredients that are only permitted in some countries but not in others.

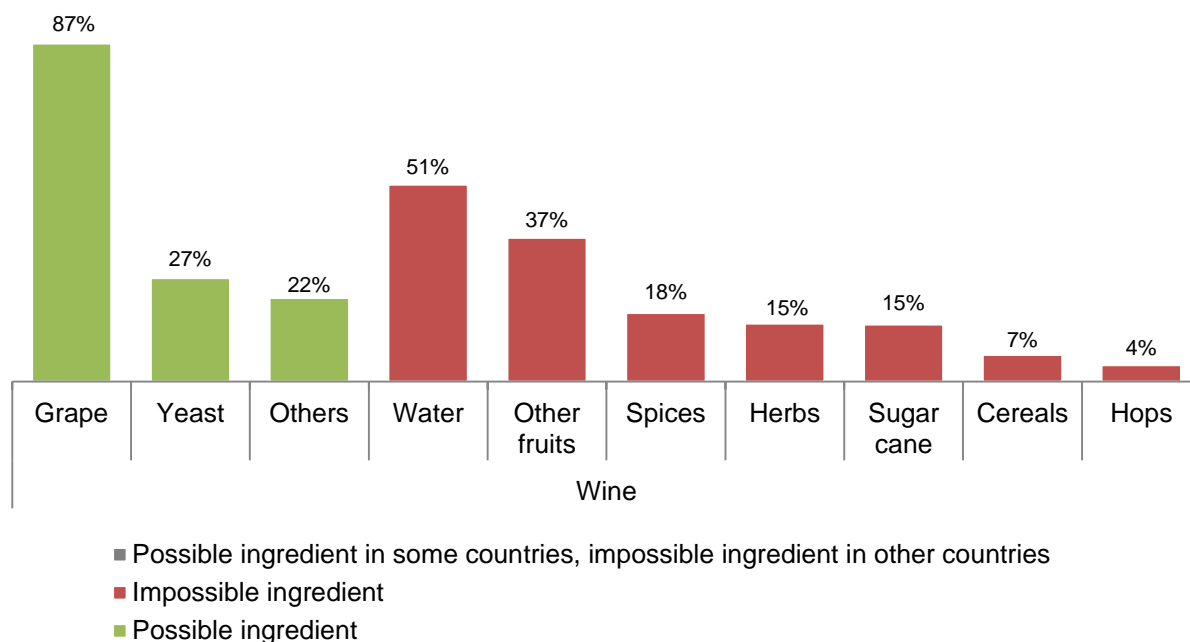
Figure 5 Knowledge regarding ingredients. Answer to the question: “Which of the following items do you think may be commonly used in the production of beer?”



Note: Question: Which of the following items do you think may be commonly used in the production of beer.
Answer categories: 1. Water 2. Cereals 3. Hops 4. Yeast 5. Grape 6. Other fruits 7. Sugar cane 8. Herbs 9. Spices 10. Others. **Correct answers** indicated in green, **incorrect answers** indicated in red. **N** = 5.395.

Overall, respondents demonstrate an ability to correctly indicate the most commonly used ingredients of beer, namely water, hops, and yeast. This is shown in the above figure.

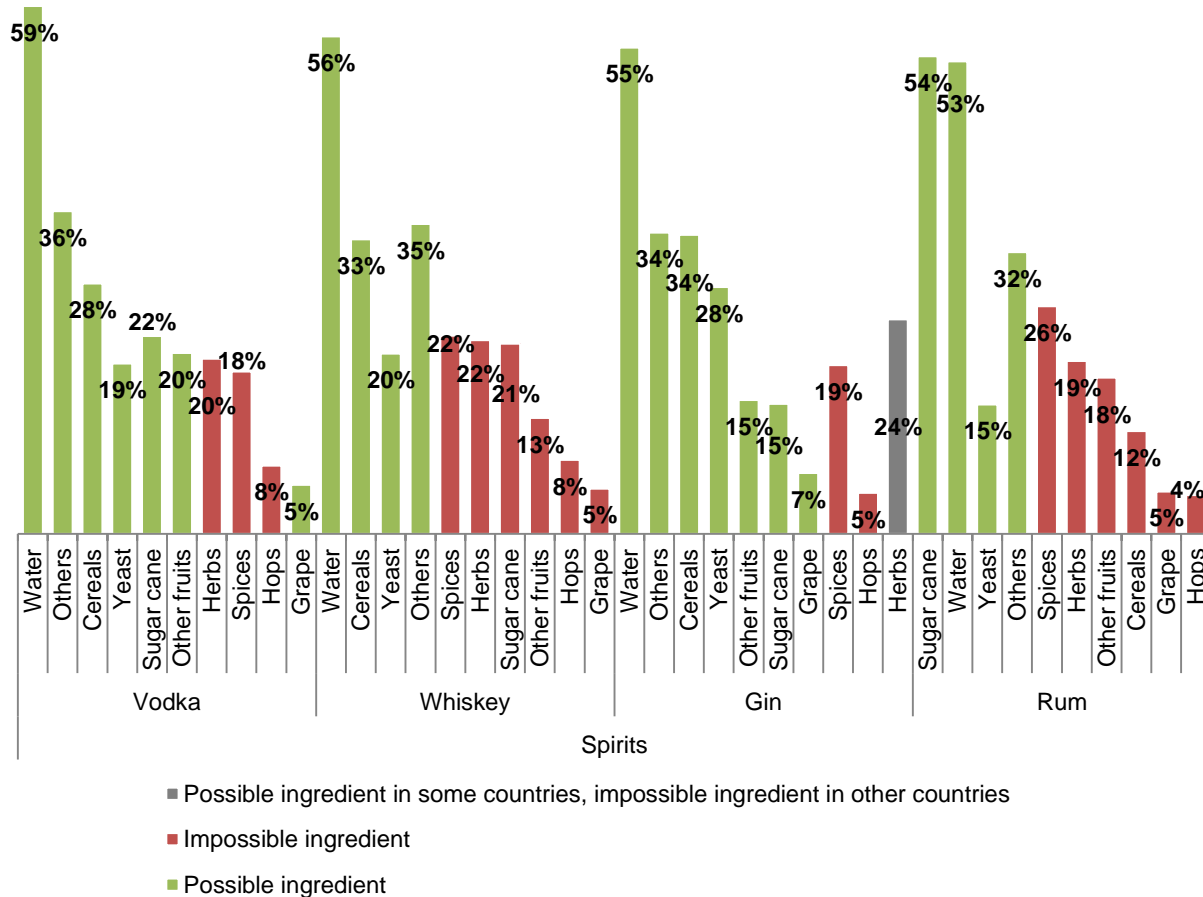
Figure 6 Knowledge regarding ingredients. Answer to the question: “Which of the following items do you think may be commonly used in the production of wine?”



Note: Question: Which of the following items do you think may be commonly used in the production of wine.
Answer categories: 1. Water 2. Cereals 3. Hops 4. Yeast 5. Grape 6. Other fruits 7. Sugar cane 8. Herbs 9. Spices 10. Others. **Correct answers** indicated in green, **incorrect answers** indicated in red. **N** = 5.395.

The ingredients of wine are not commonly known, except for grapes which are acknowledged as a main ingredient by the majority of respondents. Half of all respondents indicate incorrectly that water is an ingredient of wine and almost 2 in 5 respondents are under the false assumption that other fruits are an ingredient of wine.

Figure 7 Knowledge regarding ingredients. Answer to the question: “Which of the following items do you think may be commonly used in the production of spirits?”



Note: Questions: Which of the following items do you think may be commonly used in the production of Vodka (Spirits), Whiskey (Spirits), Gin (Spirits), Rum (Spirits). **Answer categories:** 1. Water 2. Cereals 3. Hops 4. Yeast 5. Grape 6. Other fruits 7. Sugar cane 8. Herbs 9. Spices 10. Others. **Correct answers** indicated in green, **incorrect answers** indicated in red. **N** = 5.395.

Knowledge regarding the main ingredients for different kinds of spirits is still lower than the knowledge regarding the main ingredients for beer and wine. A large proportion of respondents indicate other ingredients than those actually contained in spirits. Water is the most known main ingredient of the four different kinds of spirits.

4.1.3. Insights on knowledge of nutritional values and ingredients

Respondents often exhibited a limited knowledge of the main ingredients and nutritional values of alcoholic beverages. Moreover, although questions mainly concerned alcoholic beverages, those surveyed also revealed a low knowledge of general dietary information, such as the number of calories an adult needs per day.

When considering the different nutrients, the survey showed that respondents are more likely to know the correct content of fat within every type of alcoholic beverage than the correct number of carbohydrates or calories.

Respondents were also unable to indicate all the correct ingredients for the different types of alcoholic beverages. Knowledge of the main ingredients of beer (water, yeast and hop) was very high. Also, knowledge regarding the main ingredient of wine (grapes) was very high. Reversely, half of the respondents indicated incorrectly that water was a main ingredient of wine. Overall, knowledge of the main ingredients of spirits is lower than the knowledge of the main ingredients of beer and wine.

CONCLUSION

The majority of respondents do not know the calorie, carbohydrate or fat content of alcoholic beverages. As a result, knowledge of the nutritional values of alcoholic beverages can be considered scant.

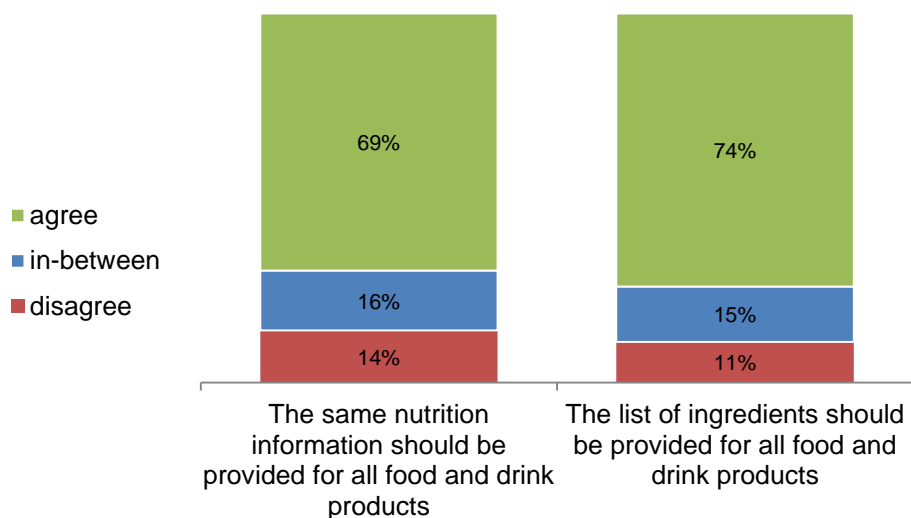
Although the majority of respondents show the ability to indicate the most commonly used ingredients of certain alcoholic beverages (beer and wine), findings revealed a number of incorrect beliefs regarding other possible ingredients of alcoholic beverages.

4.2. Interest in information about nutritional values and ingredients

4.2.1. Interest in the same nutrition and ingredients information for all food and drink products, regardless of whether they contain alcohol or not

Respondents' agreement in receiving the same nutritional and ingredient information for all food and drink products (including alcoholic beverages) was measured via two questions that considered whether the same nutrition and ingredients information should be provided for all food and drink products, regardless of whether they contain alcohol or not. This is reported in Figure 8.

Figure 8 Interest in the same nutrition and ingredients information for all food and drink products, regardless of whether they contain alcohol or not



Note: Questions: 1. The same nutrition information (energy value, proteins, carbohydrates, sugars, fat, saturated fats, salt) should be provided for all food and drink products (alcoholic and non-alcoholic). 2. The list of ingredients should be provided for all food and drink products (alcoholic and non-alcoholic). **Answer categories:** scale from 1. I strongly disagree to 7. I strongly agree. **Categories** agree: score 5 to 7, in-between: score 4, disagree: score 1 to 3. **N** = 5.395.

A majority of those surveyed agreed that the same ingredients and nutrition information should be provided for all food and drink products (alcoholic and non-alcoholic beverages) and thus can be considered as having a high appetite for information. 7 out of 10 respondents agree with the statement that the same nutrition information (energy value, fat, of which saturated, carbohydrates, of which sugars, proteins and salt) should be provided for all food and drink products, regardless of whether they contain alcohol or not. Even a larger majority of 3 out of 4 respondents agree with the statement that the same ingredients information (the list of ingredients) should be provided for all food and drink products, regardless of whether they contain alcohol or not.

The correlation between these two questions regarding the appetite for information for nutrition values and the appetite for information for ingredients is high, which means that the answers on one statement are positively and strongly related to the answers on the other statements.

Table 3 (on nutrition information) and Table 4 (on ingredient information) detail the results on a country-basis.

Table 3 Interest in nutrition information for all food and drink products, regardless of whether they contain alcohol or not – country level

| | Disagree | In-between | Agree |
|----|----------|------------|-------|
| DK | 18% | 21% | 60% |
| DE | 12% | 12% | 75% |
| UK | 13% | 21% | 66% |
| ES | 10% | 10% | 80% |
| NL | 15% | 21% | 64% |
| PL | 18% | 13% | 69% |

Note: Question: The same nutrition information (energy value, proteins, carbohydrates, sugars, fat, saturated fats, salt) should be provided for all food and drink products (alcoholic and non-alcoholic). **Answer categories:** scale from 1. I strongly disagree to 7. I strongly agree. **Categories** agree: score 5 to 7, in-between: score 4, disagree: score 1 to 3. **N** = 5.395.

Respondents in Spain are most interested in receiving the same nutrition information for all food and drinks, regardless of whether they contain alcohol or not. 4 out of 5 Spanish respondents agree with the statement that the same nutrition information (energy value, proteins, carbohydrates, sugars, fat, saturated fats, salt) should be provided for all food and drink products (alcoholic and non-alcoholic). Respondents in Denmark are least interested in receiving this information. 3 out of 5 respondents agree with the statement, and almost 1 in 5 respondents disagree with the statement.

Table 4 Interest in the ingredients list for all food and drink products, regardless of whether they contain alcohol or not – country level

| | Disagree | In-between | Agree |
|----|----------|------------|-------|
| DK | 13% | 22% | 65% |
| DE | 9% | 11% | 80% |
| UK | 10% | 18% | 73% |
| ES | 8% | 7% | 84% |
| NL | 13% | 20% | 68% |
| PL | 13% | 10% | 77% |

Note: Question: The list of ingredients should be provided for all food and drink products (alcoholic and non-alcoholic). **Answer categories:** scale from 1. I strongly disagree to 7. I strongly agree. **Categories** agree: score 5 to 7, in-between: score 4, disagree: score 1 to 3. **N** = 5.395.

Respondents in Spain are most interested in receiving the same ingredients information for all food and drinks, regardless of whether they contain alcohol or not. 4 out of 5 German and Spanish respondents agree with the statement that the list of ingredients should be provided for all food and drink products (alcoholic and non-alcoholic). Respondents in Denmark and the Netherlands are least interested in receiving this information.

4.2.2. Insights on the interest in nutrition and ingredients information

Previous studies found high levels of public support for health information and warning messages on alcoholic beverages, including for nutritional information, alcohol content and health warnings.⁶ Although the knowledge is limited, this insight survey confirms an interest amongst consumers for nutrition and ingredient information on all food and drink products, regardless of whether they contain alcohol or not.

As previously mentioned, alcoholic beverages of more than 1.2% alcohol by volume represent an exception to existing EU legislation whereby they are not obligated to provide the nutrition declaration and ingredients list to consumers (although specific regulations apply to beer in some countries). This begs the question of what can be done to better meet the expectations of consumers. Although there is no regulation, and studies have shown that respondents may want the same information (even if there seem to be doubts as to whether people will then consult, or increase their knowledge from the provided information), distributors and manufacturers of alcoholic beverages have already considered other means of providing the consumer with information.

CONCLUSION

There is a general interest to receive the same information on ingredient and nutrition information for alcoholic beverages as is currently provided for other food and drink products.

4.3. Use of and attitudes towards off-label information platforms to access information on nutrition values and ingredients of alcoholic beverages

In the previous section, we discussed respondents' interest in receiving the same nutrition and ingredient information for all food and drink products, including alcoholic beverages. This section will look to the different information sources through which this information can be accessed. All sources looked at are 'off-label', meaning they present alternatives to the standard product labelling. We investigate consumers' interest in accessing information regarding nutrition and ingredients off-label, their preferences among these sources, which off-label information sources are most trusted and how often respondents actually use these off-label information sources.

Seven off-label information sources were made operational. First of all, commercial information can be given to consumers via advertisements. We included two off-label information sources that related to advertisements. Advertisements can be accessed via magazines or television or outdoors, and it can also be accessed via in-store communication such as banners, posters, information in the aisle or on the shelf. Second, online information can be given to consumers via websites. We included three off-label information sources that related to websites: product or brand-related websites such as official brand websites and Facebook pages, public health authorities' websites, and other health and nutrition websites. Third, new media tools, labelled applications, can be considered as off-label information sources. Both offline applications and online applications are considered as two separate off-label information sources. Offline applications do not require internet. This means that it is not

⁶ Thomson LM, Vandenberg B, Fitzgerald JL. An exploratory study of drinkers views of health information and warning labels on alcohol containers. Drug Alcohol Rev. 2012; 31(2): 240-247.

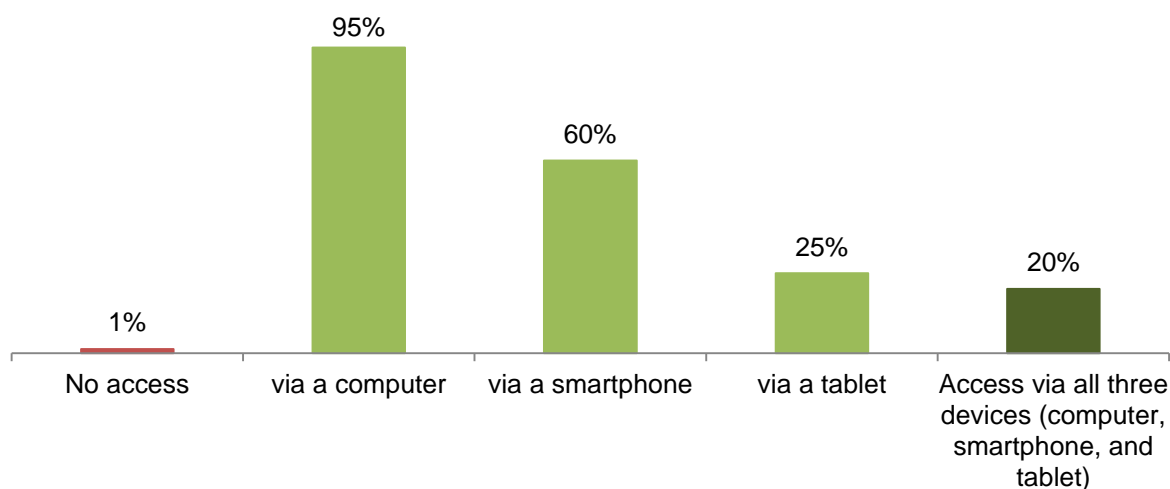
necessary to be connected to internet to use these types of applications, as they just have to be downloaded, installed and updated with an internet connection and thereafter used offline. Online applications often use QR codes, which is a Quick Response or two-dimensional barcode that can be scanned and which can direct consumers to online tools and webpages.

The reason for which we consider these off-label and mostly digital information sources is because global fixed and mobile Internet penetration is continuously growing. Europe is the region in which the fixed and mobile internet penetration is at its highest. The fixed internet penetration is 74% in Europe and the mobile internet penetration in Europe is 67%.⁷ It is therefore necessary to examine information sources that European consumers can use to self-inform about the nutritional values and ingredients of alcoholic beverages.

Increasingly complex consumer journeys are driven by multi-media usage and a multitude of touch points (online and offline) that change the way people live and interact with products and services. We are living in a fast-changing consumer-driven digital age. People around the world connect to the Internet in different ways. This explosion of digital devices and internet accessibility has changed the way consumers shop, search, communicate, gather information and engage with brands. The hyper-connected is happening now and is driven by multi-device usage.⁸

If we consider the insight consumer survey in Figure 9, almost all respondents (99%) have access to the Internet, as it is an online survey, and the computer remains the main device used. Furthermore, more than half of all respondents confirmed their access to the Internet via smartphone. The tablet is the least popular device to access the Internet, as it is the most recent development. Overall, one in five respondents had access to Internet via all three devices.

Figure 9 Access to internet



Note: Question: Which of the following items do you own or have access to? **Multiple response:** 1. A computer without internet 2. A computer with internet 3. A tablet without a mobile internet subscription (only WIFI connection) 4. A tablet with mobile internet (WIFI connection and mobile internet subscription) 5. A smartphone without internet subscription (only WIFI connection) 6. A smartphone with mobile internet (WIFI connection and mobile internet subscription) 7. None of the above. Bar charts represent response 7, 2, 4, 6 and the computed score if response 2 AND 4 AND 6 is given. **N** = 5.395.

⁷ International Telecommunication Union 2013. CIS – Commonwealth of Independent States (Former Soviet Republics: Armenia, Azerbaijan, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Russian Federation, Tajikistan, Turkmenistan, Ukraine, and Uzbekistan).

⁸ GfK, Digital Market Intelligence team

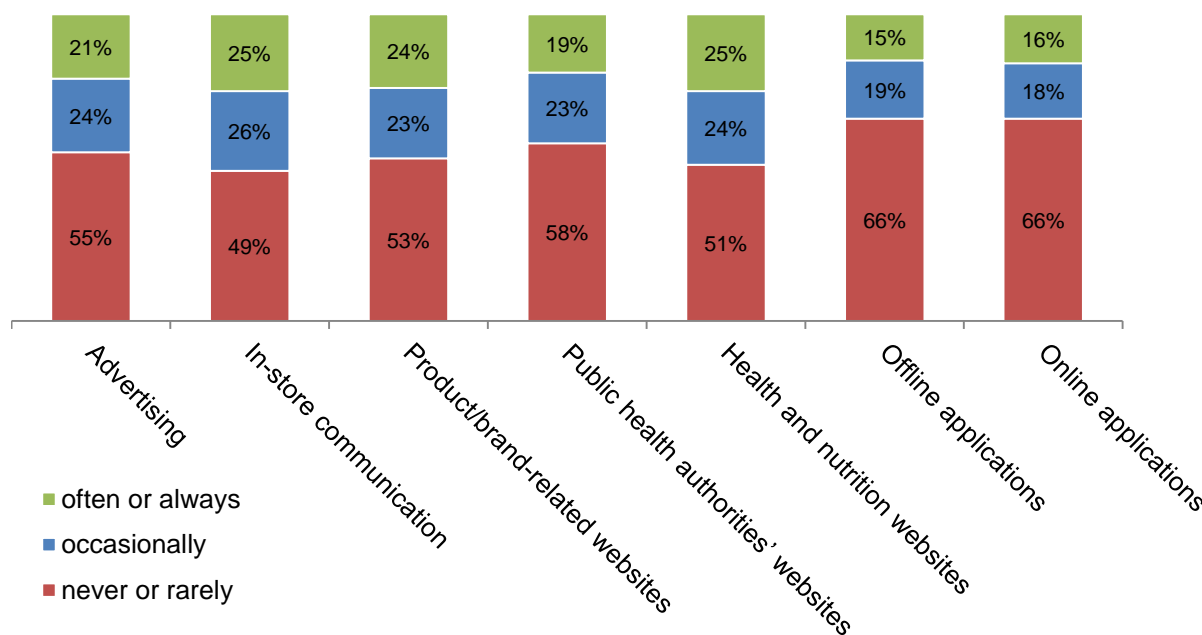
Many organisations and companies invest in the use of these new online tools and applications. Policy is also increasingly focused on dealing with a hyper-connected Europe. For instance, Europe 2020 included Europe’s Digital Agenda to support the dialogue between citizens and decision-makers via social media and mobile technologies.

One single question, combining nutrition and ingredient information, was asked for each of the following: use of, preference for and trust in off-label information sources. When questioning the interest in off-label sources, a specific question addressed ingredient information and another specific question addressed nutrition information.

4.3.1. Use of off-label information sources to access nutrition and ingredient information for alcoholic beverages

The use of these seven off-label sources to access information on nutrition values and ingredients of alcoholic beverages is illustrated in Figure 10. Respondents answered to what extent they used these seven off-label information sources to search for nutrition and ingredient information.

Figure 10 Use of off-label information sources to access information on nutrition values and ingredients of alcoholic beverages



Note: Question: How often do you use the following information sources to access ingredient and nutrition information for alcoholic beverages? Please indicate your use on a scale of 1 (Never) to 5 (Always). **Answer categories:** 1. Never, 2. Rarely, 3. Occasionally, 4. Often, 5. Always **Categories** never or rarely: score 1 and 2, occasionally: score 3, often or always: score 4 and 5. **N** = 5.395.

Health and nutrition websites, in-store communication, and product or brand-related websites are most often used to search for information on nutrition and ingredients. A quarter of the respondents often or always use these off-label information sources to access ingredient and nutrition information for alcoholic beverages. Offline and online applications are least often used to search for information on nutrition and ingredients. Two in three respondents never or rarely use these off-label information sources to access ingredient and nutrition information for alcoholic beverages.

Table 5: Use of off-label information sources to access information on nutrition values and ingredients of alcoholic beverages – country level

| Advertising | never or rarely | occasionally | often or always |
|-------------------------------------|-----------------|--------------|-----------------|
| DK | 73% | 16% | 11% |
| DE | 51% | 27% | 22% |
| UK | 54% | 22% | 24% |
| ES | 34% | 28% | 38% |
| NL | 71% | 20% | 9% |
| PL | 48% | 28% | 24% |
| In-store communication | never or rarely | occasionally | often or always |
| DK | 65% | 20% | 15% |
| DE | 46% | 28% | 27% |
| UK | 48% | 24% | 28% |
| ES | 30% | 28% | 42% |
| NL | 66% | 23% | 11% |
| PL | 41% | 32% | 26% |
| Product/brand-related websites | never or rarely | occasionally | often or always |
| DK | 69% | 17% | 14% |
| DE | 54% | 25% | 21% |
| UK | 54% | 19% | 27% |
| ES | 30% | 29% | 40% |
| NL | 69% | 19% | 12% |
| PL | 44% | 28% | 28% |
| Public health authorities' websites | never or rarely | occasionally | often or always |
| DK | 70% | 21% | 9% |
| DE | 60% | 25% | 15% |
| UK | 58% | 19% | 23% |
| ES | 37% | 31% | 32% |
| NL | 71% | 20% | 9% |
| PL | 51% | 25% | 24% |
| Health and nutrition websites | never or rarely | occasionally | often or always |
| DK | 67% | 20% | 13% |
| DE | 50% | 27% | 23% |
| UK | 54% | 20% | 26% |
| ES | 31% | 30% | 39% |
| NL | 64% | 23% | 13% |
| PL | 39% | 27% | 34% |
| Offline applications | never or rarely | occasionally | often or always |
| DK | 80% | 14% | 6% |
| DE | 62% | 22% | 16% |
| UK | 62% | 17% | 21% |
| ES | 51% | 24% | 25% |
| NL | 80% | 14% | 6% |
| PL | 61% | 24% | 15% |
| Online applications | never or rarely | occasionally | often or always |
| DK | 76% | 16% | 8% |
| DE | 63% | 20% | 17% |
| UK | 63% | 15% | 22% |
| ES | 47% | 25% | 28% |
| NL | 81% | 12% | 6% |
| PL | 65% | 20% | 15% |

Note: Question: How often do you use the following information sources to access ingredient and nutrition information for alcoholic beverages? Please indicate your use on a scale of 1 (Never) to 5 (Always). **Answer categories:** 1. Never, 2. Rarely, 3. Occasionally, 4. Often, 5. Always **Categories** never or rarely: score 1 and 2, occasionally: score 3, often or always: score 4 and 5. **N** = 5.395.

Examining country differences, we see strong differences in the use of these seven different off-label information sources to access information on ingredients and nutrition values for alcoholic beverages.

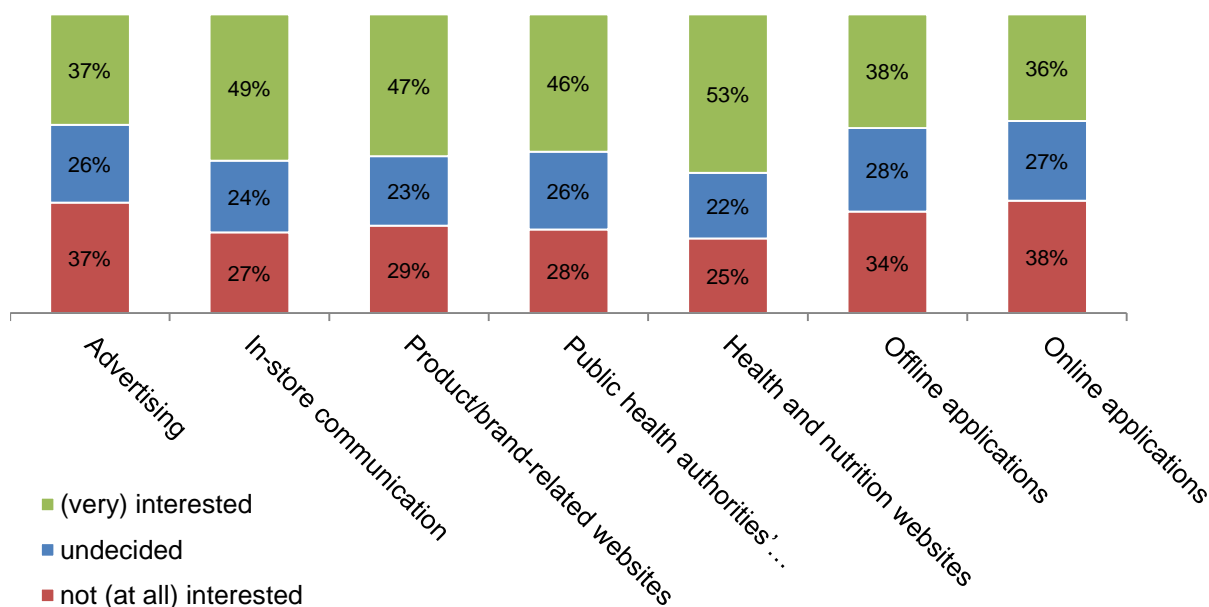
Respondents in Denmark and the Netherlands are more likely to never or rarely use these seven off-label information sources (percentages never or rarely use vary between 65% and 80% in Denmark, between 64% and 81% in the Netherlands). Respondents in Spain are most likely to often or always use these seven off-label information sources (percentages often or always use vary between 25% and 42%).

4.3.2. Interest in off-label information sources to access ingredient and nutrition information for alcoholic beverages

4.3.2.1. Interest in off-label information sources to access ingredient information for alcoholic beverages

The interest in these seven off-label sources to access information on nutrition values of alcoholic beverages is illustrated in Figure 11. Respondents answered to what extent they were interested in these seven off-label information sources to search for information on ingredients, in case the information would not be available on the label.

Figure 11 Interest in off-label information sources to access information on ingredients of alcoholic beverages



Note: Question: In case the information would not be available on the label, how interested would you be in accessing ingredient information (the list of ingredients) for alcoholic beverages, from the following types of information sources? Please indicate your interest on a scale of 1 (Not at all interested) to 5 (Very interested). **Answer categories:** 1. Not at all interested, 2. Not interested, 3. Undecided, 4. Interested, 5. Very interested. **Categories not (at all) interested:** score 1 and 2, undecided: score 3, (very) interested: score 4 and 5. **N** = 5.395.

Interest is highest in health and nutrition websites, in-store communication, product or brand-related websites, and public health authorities' websites to search for information on ingredients of alcoholic beverages. Around half of the respondents are (very) interested in these off-label information sources to access ingredient information for alcoholic beverages. Interest in online applications, offline applications and advertising is lowest to search for information on ingredients.

Table 6: Interest in off-label information sources to access information on ingredients of alcoholic beverages – country level

| Advertising | not (at all) interested | undecided | (very) interested |
|-------------------------------------|-------------------------|-----------|-------------------|
| DK | 56% | 23% | 21% |
| DE | 35% | 31% | 34% |
| UK | 35% | 22% | 43% |
| ES | 20% | 20% | 60% |
| NL | 40% | 36% | 24% |
| PL | 35% | 22% | 43% |
| In-store communication | not (at all) interested | undecided | (very) interested |
| DK | 40% | 25% | 35% |
| DE | 24% | 29% | 47% |
| UK | 27% | 20% | 52% |
| ES | 16% | 17% | 67% |
| NL | 28% | 34% | 38% |
| PL | 25% | 22% | 53% |
| Product/brand-related websites | not (at all) interested | undecided | (very) interested |
| DK | 46% | 22% | 32% |
| DE | 31% | 25% | 44% |
| UK | 28% | 20% | 51% |
| ES | 13% | 14% | 73% |
| NL | 32% | 36% | 32% |
| PL | 26% | 21% | 53% |
| Public health authorities' websites | not (at all) interested | undecided | (very) interested |
| DK | 40% | 22% | 38% |
| DE | 28% | 28% | 44% |
| UK | 32% | 24% | 44% |
| ES | 15% | 18% | 67% |
| NL | 26% | 37% | 37% |
| PL | 28% | 25% | 47% |
| Health and nutrition websites | not (at all) interested | undecided | (very) interested |
| DK | 42% | 23% | 35% |
| DE | 22% | 24% | 55% |
| UK | 29% | 20% | 52% |
| ES | 13% | 15% | 72% |
| NL | 22% | 33% | 46% |
| PL | 23% | 16% | 61% |
| Offline applications | not (at all) interested | undecided | (very) interested |
| DK | 51% | 28% | 21% |
| DE | 30% | 28% | 42% |
| UK | 33% | 27% | 39% |
| ES | 21% | 20% | 59% |
| NL | 34% | 38% | 28% |
| PL | 32% | 27% | 41% |
| Online applications | not (at all) interested | undecided | (very) interested |
| DK | 50% | 25% | 25% |
| DE | 34% | 28% | 38% |
| UK | 37% | 23% | 40% |
| ES | 22% | 20% | 57% |
| NL | 43% | 35% | 22% |
| PL | 39% | 29% | 32% |

Note: Question: In case the information would not be available on the label, how interested would you be in accessing ingredient information (the list of ingredients) for alcoholic beverages, from the following types of information sources? Please indicate your interest on a scale of 1 (Not at all interested) to 5 (Very interested).

Answer categories: 1. Not at all interested, 2. Not interested, 3. Undecided, 4. Interested, 5. Very interested.

Categories not (at all) interested: score 1 and 2, **undecided:** score 3, **(very) interested:** score 4 and 5. **N** = 5.395.

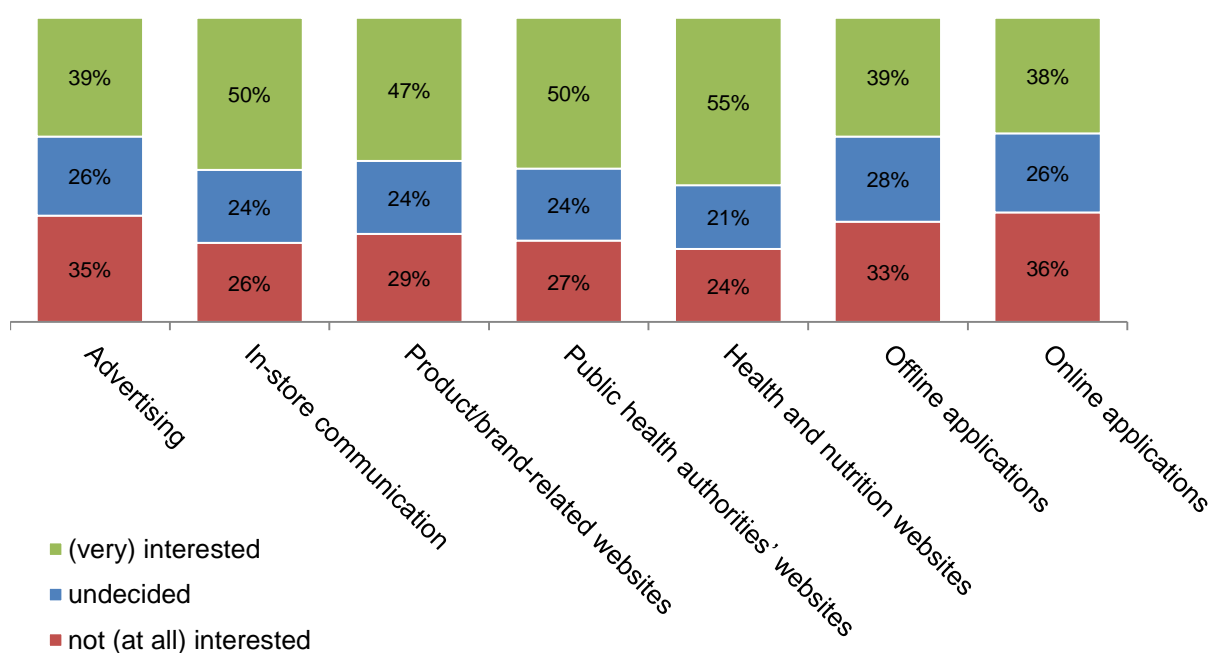
Examining country differences, we see strong differences in the interest in these seven different off-label information sources to access information on ingredients of alcoholic beverages.

Respondents in Denmark are always the least interested to access ingredient information (the list of ingredients) for alcoholic beverages in case the information would not be available on the label, regardless of the off-label source of information (percentages not (at all) interested vary between 40% and 65%). Respondents in Spain are always the most interested in accessing ingredient information via the seven off-label information sources (percentages (very) interested vary between 57% and 73%).

4.3.2.2. Interest in off-label information sources to access nutrition information for alcoholic beverages

The interest in these seven off-label sources to access information on nutrition values of alcoholic beverages is illustrated in Figure 12. Respondents answered to what extent they were interested in these seven off-label information sources to search for nutrition information, in case the information would not be available on the label.

Figure 12 Interest in off-label information sources to access information on nutrition values of alcoholic beverages



Note: Question: In case the information would not be available on the label, how interested would you be in accessing nutrition information (energy value, proteins, carbohydrates, sugars, fat, saturated fats, salt) for alcoholic beverages, from the following types of information sources? Please indicate your interest on a scale of 1 (Not at all interested) to 5 (Very interested). **Answer categories:** 1. Not at all interested, 2. Not interested, 3. Undecided, 4. Interested, 5. Very interested. **Categories not (at all) interested:** score 1 and 2, undecided: score 3, (very) interested: score 4 and 5. **N** = 5.395.



Interest to access information on nutrition values is highest via the three types of websites (health and nutrition websites, public health authorities' websites, product or brand-related websites), and via in-store communication. Around half of the respondents indicate to be (very) interested in these off-label information sources to access nutrition information for alcoholic beverages, when the information cannot be found on the label.

In Table 7, we consider these results on a country-level.

Table 7: Interest in off-label information sources to access information on nutrition values of alcoholic beverages – country level

| Advertising | not (at all) interested | undecided | (very) interested |
|-------------------------------------|-------------------------|-----------|-------------------|
| DK | 56% | 21% | 23% |
| DE | 33% | 31% | 36% |
| UK | 32% | 24% | 44% |
| ES | 19% | 19% | 62% |
| NL | 39% | 37% | 24% |
| PL | 31% | 23% | 45% |
| In-store communication | not (at all) interested | undecided | (very) interested |
| DK | 42% | 24% | 34% |
| DE | 22% | 28% | 50% |
| UK | 25% | 20% | 55% |
| ES | 14% | 15% | 71% |
| NL | 30% | 34% | 35% |
| PL | 23% | 21% | 56% |
| Product/brand-related websites | not (at all) interested | undecided | (very) interested |
| DK | 45% | 22% | 33% |
| DE | 28% | 29% | 43% |
| UK | 28% | 21% | 51% |
| ES | 14% | 14% | 72% |
| NL | 34% | 36% | 30% |
| PL | 23% | 21% | 55% |
| Public health authorities' websites | not (at all) interested | undecided | (very) interested |
| DK | 40% | 20% | 40% |
| DE | 26% | 26% | 48% |
| UK | 28% | 24% | 48% |
| ES | 13% | 15% | 72% |
| NL | 28% | 35% | 36% |
| PL | 25% | 22% | 53% |
| Health and nutrition websites | not (at all) interested | undecided | (very) interested |
| DK | 40% | 22% | 38% |
| DE | 22% | 21% | 57% |
| UK | 25% | 20% | 55% |
| ES | 13% | 14% | 73% |
| NL | 26% | 31% | 44% |
| PL | 20% | 18% | 62% |
| Offline applications | not (at all) interested | undecided | (very) interested |
| DK | 50% | 27% | 23% |
| DE | 29% | 28% | 43% |
| UK | 33% | 26% | 41% |
| ES | 19% | 21% | 60% |
| NL | 37% | 38% | 25% |
| PL | 29% | 28% | 43% |
| Online applications | not (at all) interested | undecided | (very) interested |
| DK | 50% | 24% | 26% |
| DE | 34% | 26% | 40% |
| UK | 35% | 21% | 44% |
| ES | 20% | 22% | 58% |
| NL | 43% | 35% | 21% |
| PL | 35% | 29% | 35% |

Note: Question: In case the information would not be available on the label, how interested would you be in accessing nutrition information (energy value, proteins, carbohydrates, sugars, fat, saturated fats, salt) for alcoholic beverages, from the following types of information sources? Please indicate your interest on a scale of 1 (Not at all interested) to 5 (Very interested). **Answer categories:** 1. Not at all interested, 2. Not interested, 3. Undecided, 4. Interested, 5. Very interested. **Categories** not (at all) interested: score 1 and 2, undecided: score 3, (very) interested: score 4 and 5. **N** = 5.395.

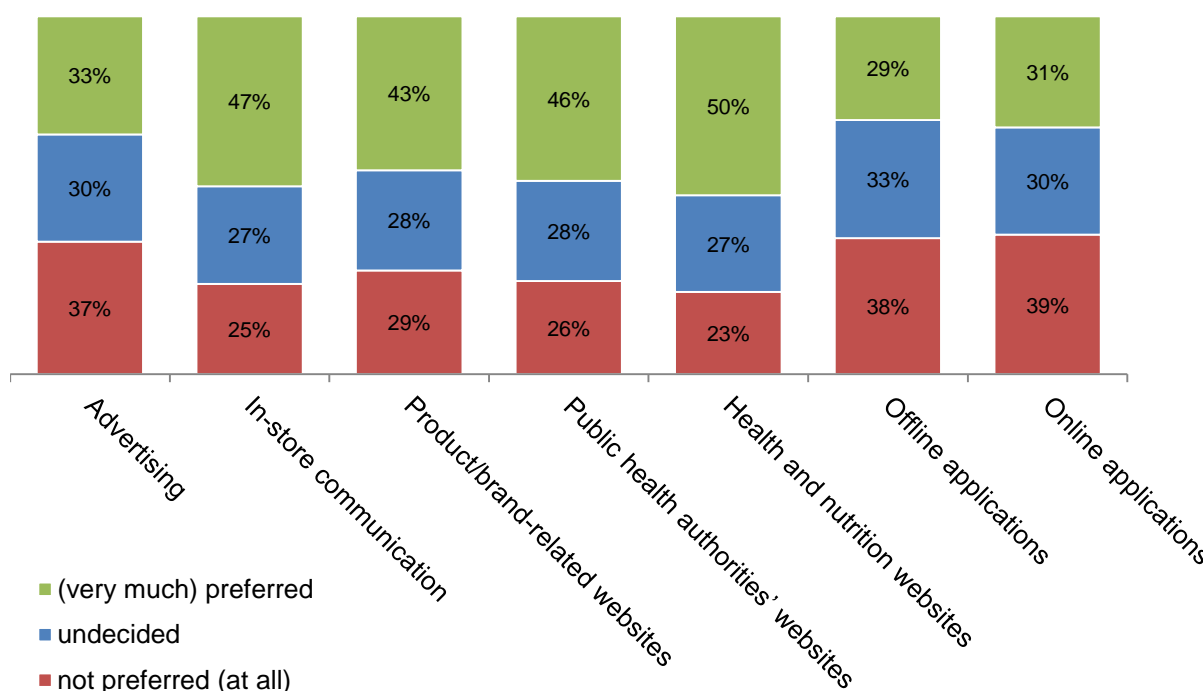
Examining country differences, we see strong differences in the interest in these seven different off-label information sources to access information on nutrition information of alcoholic beverages.

Respondents in Denmark are always the least interested to access nutrition information (energy value, proteins, carbohydrates, sugars, fat, saturated fats, salt) for alcoholic beverages in case the information would not be available on the label, regardless of the off-label source of information (percentages not (at all) interested vary between 40% and 56%). Respondents in Spain are always the most interested in accessing nutrition information via the seven off-label information sources in case the information would not be available on the label (percentages (very) interested vary between 58% and 73%).

4.3.3. Preference for off-label information sources to access nutrition and ingredient information for alcoholic beverages

Next, in Figure 13, we consider respondents' preference for using off-label sources to access information on nutrition values and ingredients of alcoholic beverages. Respondents answered to what extent they would prefer these seven off-label information sources to search for ingredients and nutrition information, in case the information would not be available on the label.

Figure 13 Preference for off-label information sources to access ingredients and nutrition information of alcoholic beverages



Note: Question: In case the information would not be available on the label, where would you prefer to find this information from the following information sources? Please indicate your preference on a scale of 1 (Not preferred at all) to 5 (Very much preferred). **Answer categories:** 1. Not preferred at all, 2. Not preferred, 3. Undecided, 4. Preferred, 5. Very much preferred **Categories not preferred (at all):** score 1 and 2, undecided: score 3, (very much) preferred: score 4 and 5. **N** = 5.395.



Preference to access ingredients and nutrition information is highest via the three types of websites (health and nutrition websites, public health authorities' websites, product or brand-related websites), and via in-store communication. Reversely, almost 4 out of 10 respondents indicate that the off-label sources advertising, offline and online applications are not preferred (at all) to access ingredients and nutrition information for alcoholic beverages, when the information cannot be found on the label.

In Table 8, we consider the results on a country-basis.

Table 8: Preference for off-label information sources to access ingredients and nutrition information of alcoholic beverages – country level

| Advertising | not preferred (at all) | undecided | (very much) preferred |
|-------------------------------------|------------------------|-----------|-----------------------|
| DK | 54% | 29% | 17% |
| DE | 37% | 36% | 27% |
| UK | 34% | 25% | 41% |
| ES | 21% | 25% | 54% |
| NL | 42% | 38% | 19% |
| PL | 33% | 26% | 41% |
| In-store communication | not preferred (at all) | undecided | (very much) preferred |
| DK | 37% | 28% | 35% |
| DE | 25% | 32% | 44% |
| UK | 22% | 25% | 53% |
| ES | 14% | 19% | 67% |
| NL | 28% | 36% | 35% |
| PL | 24% | 25% | 51% |
| Product/brand-related websites | not preferred (at all) | undecided | (very much) preferred |
| DK | 44% | 29% | 27% |
| DE | 32% | 32% | 36% |
| UK | 28% | 24% | 48% |
| ES | 15% | 19% | 66% |
| NL | 36% | 37% | 27% |
| PL | 20% | 24% | 55% |
| Public health authorities' websites | not preferred (at all) | undecided | (very much) preferred |
| DK | 35% | 26% | 39% |
| DE | 29% | 31% | 40% |
| UK | 27% | 27% | 46% |
| ES | 13% | 19% | 68% |
| NL | 28% | 37% | 35% |
| PL | 23% | 27% | 50% |
| Health and nutrition websites | not preferred (at all) | undecided | (very much) preferred |
| DK | 37% | 28% | 35% |
| DE | 23% | 31% | 46% |
| UK | 24% | 26% | 50% |
| ES | 12% | 18% | 69% |
| NL | 24% | 35% | 41% |
| PL | 18% | 21% | 61% |
| Offline applications | not preferred (at all) | undecided | (very much) preferred |
| DK | 54% | 31% | 15% |
| DE | 37% | 35% | 28% |
| UK | 36% | 32% | 32% |
| ES | 22% | 28% | 50% |
| NL | 44% | 38% | 18% |
| PL | 34% | 33% | 33% |
| Online applications | not preferred (at all) | undecided | (very much) preferred |
| DK | 49% | 29% | 22% |
| DE | 39% | 28% | 33% |
| UK | 36% | 28% | 36% |
| ES | 22% | 27% | 52% |
| NL | 47% | 37% | 16% |
| PL | 38% | 33% | 29% |

Note: Question: In case the information would not be available on the label, where would you prefer to find this information from the following information sources? Please indicate your preference on a scale of 1 (Not preferred at all) to 5 (Very much preferred). **Answer categories:** 1. Not preferred at all, 2. Not preferred, 3. Undecided, 4. Preferred, 5. Very much preferred **Categories not preferred (at all):** score 1 and 2, **undecided:** score 3, **(very much) preferred:** score 4 and 5. **N** = 5.395.

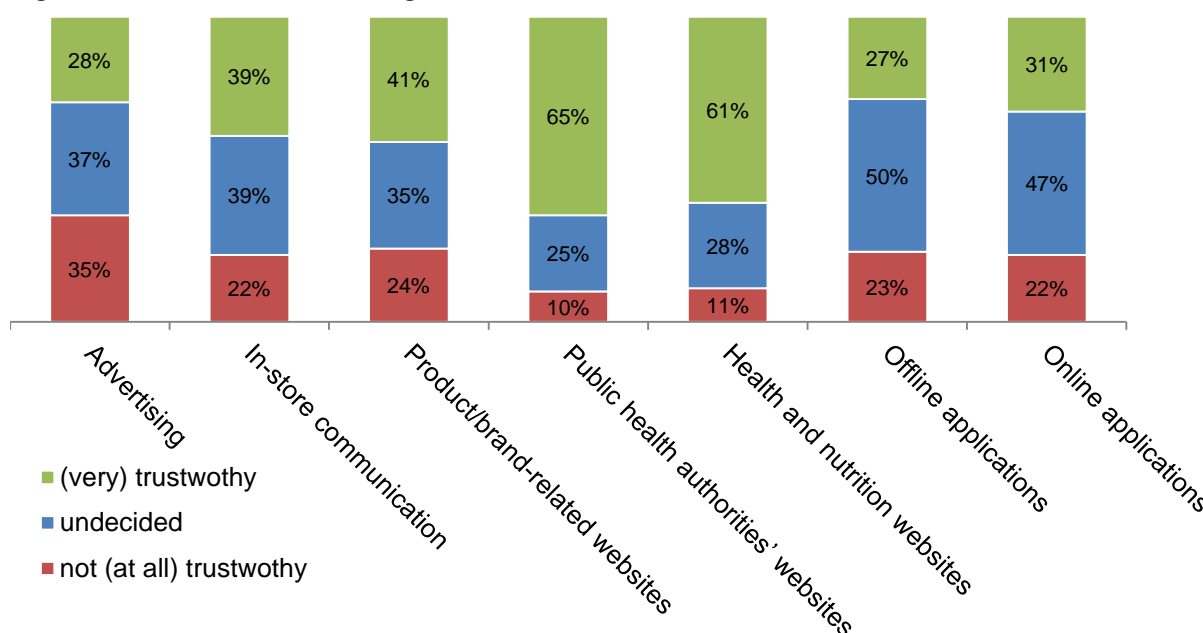
Examining country differences, we see differences in the preference for these seven different off-label information sources to access ingredients and nutrition information of alcoholic beverages.

Respondents in Denmark always indicate to not prefer (at all) to access information for alcoholic beverages in case the information would not be available on the label via these seven off-label sources (percentages not preferred (at all) vary between 37% and 54%). Also respondents in the Netherlands show a lack of preference to access information via offline and online applications, advertising and product or brand-related websites. Respondents in Spain always prefer the most often the seven off-label sources to access ingredient and nutrition information (percentages (very much) preferred vary between 50% and 69%). Also respondents in Poland prefer more often to access this kind of information via websites (product or brand-related websites, public health authorities' websites, health and nutrition websites).

4.3.4. Trust in off-label information sources to access information on nutrition values and ingredients of alcoholic beverages

Subsequently, we consider respondents' level of trust in these off-label sources to access information on nutrition values and ingredients of alcoholic beverages in Figure 14.

Figure 14 Trust in off-label information sources to access information on nutrition values and ingredients of alcoholic beverages



Note: Question: When it comes to accessing ingredient and nutrition information, to what extent do you trust the following information sources? Please indicate your trust on a scale of 1 (Not at all trustworthy) to 5 (Very trustworthy). **Answer categories:** 1. Not at all trustworthy, 2. Not trustworthy, 3. Undecided, 4. Trustworthy, 5. Very trustworthy **Categories not (at all) trustworthy:** score 1 and 2, undecided: score 3, (very) trustworthy: score 4 and 5. **N** = 5.395.

Trust to access information on nutrition values and ingredients of alcoholic beverages is very high when websites as type of off-label source is considered, more in particular the public health authorities' websites and the health and nutrition websites. Trust is not that frequently placed in advertising, a third of the respondents don't trust this type of off-label source to access information on ingredients and nutrition values of alcoholic beverages.

Table 9: Trust in off-label information sources to access information on nutrition values and ingredients of alcoholic beverages – country level

| Advertising | not (at all) trustworthy | undecided | (very) trustworthy |
|-------------------------------------|--------------------------|-----------|--------------------|
| DK | 48% | 36% | 15% |
| DE | 37% | 41% | 22% |
| UK | 24% | 38% | 38% |
| ES | 25% | 30% | 44% |
| NL | 36% | 46% | 18% |
| PL | 40% | 29% | 31% |
| In-store communication | not (at all) trustworthy | undecided | (very) trustworthy |
| DK | 30% | 42% | 28% |
| DE | 22% | 43% | 35% |
| UK | 14% | 42% | 44% |
| ES | 16% | 25% | 59% |
| NL | 20% | 51% | 30% |
| PL | 27% | 32% | 41% |
| Product/brand-related websites | not (at all) trustworthy | undecided | (very) trustworthy |
| DK | 33% | 41% | 26% |
| DE | 28% | 39% | 33% |
| UK | 17% | 37% | 46% |
| ES | 17% | 23% | 60% |
| NL | 26% | 44% | 30% |
| PL | 21% | 28% | 51% |
| Public health authorities' websites | not (at all) trustworthy | undecided | (very) trustworthy |
| DK | 14% | 26% | 60% |
| DE | 10% | 25% | 66% |
| UK | 7% | 25% | 67% |
| ES | 9% | 15% | 76% |
| NL | 10% | 34% | 55% |
| PL | 12% | 25% | 63% |
| Health and nutrition websites | not (at all) trustworthy | undecided | (very) trustworthy |
| DK | 19% | 32% | 50% |
| DE | 10% | 31% | 59% |
| UK | 7% | 30% | 63% |
| ES | 8% | 16% | 76% |
| NL | 10% | 36% | 54% |
| PL | 12% | 25% | 63% |
| Offline applications | not (at all) trustworthy | undecided | (very) trustworthy |
| DK | 26% | 59% | 16% |
| DE | 22% | 50% | 28% |
| UK | 15% | 51% | 34% |
| ES | 22% | 37% | 41% |
| NL | 26% | 56% | 19% |
| PL | 24% | 48% | 28% |
| Online applications | not (at all) trustworthy | undecided | (very) trustworthy |
| DK | 25% | 54% | 21% |
| DE | 23% | 43% | 35% |
| UK | 15% | 49% | 36% |
| ES | 18% | 35% | 47% |
| NL | 27% | 53% | 20% |
| PL | 23% | 48% | 29% |

Note: Question: When it comes to accessing ingredient and nutrition information, to what extent do you trust the following information sources? Please indicate your trust on a scale of 1 (Not at all trustworthy) to 5 (Very trustworthy). **Answer categories:** 1. Not at all trustworthy, 2. Not trustworthy, 3. Undecided, 4. Trustworthy, 5. Very trustworthy **Categories** not (at all) trustworthy: score 1 and 2, undecided: score 3, (very) trustworthy: score 4 and 5. **N** = 5.395.

Again, we see country differences similar to the country results when considering other attitudes such as interest and preference. Spanish respondents tend to have more trust in all types of off-label sources to access information, while especially Danish respondents tend to have the least trust in all types of off-label sources. Next to these general country differences, we see that trust in offline and online applications, is especially less given by respondents from the Netherlands, trust in in-store communication is lower in Poland.

4.3.5. Insights on off-label information sources to access information on nutrition values and ingredients of alcoholic beverages

Seven different off-label information sources were considered: commercial off-line information sources (advertisements and in-store communications), online information sources (product or brand-related websites, public health authorities' websites, health and nutrition websites), and new media tools (offline applications and online applications). As aforementioned, the reason for which we focus on these off-label and mostly digital information sources is because global fixed and mobile internet penetration is continuously growing.

The use is limited, as half of the respondents never or rarely use these seven different off-label information sources to access information on ingredients and nutrition values. Applications (offline and online) are least often used to search for information on nutrition and ingredients than advertisement sources or websites, two thirds of the respondents never or rarely use these two new media tools.

Interest in accessing information via these resources does not differ for ingredient and nutrition information. Around half of the respondents are interested in finding information on the three different types of websites and via advertising, a much smaller proportion is interested in using applications for the same purpose.

While there is considerable interest in accessing the information off-label, the percentage of respondents preferring a certain off-label information source in case nutrition and ingredient information was not available on the label is somewhat lower. Again, preference is lower when considering applications compared to other types of off-label information sources such as websites and advertisements.

Trust in these off-label information sources is high for websites, especially websites run by public health authorities' and other health and nutrition websites. Trust in both offline and online applications is lower: about half of the respondents indicated that they were undecided whether to trust or distrust these types of off-label information sources.

CONCLUSIONS

European citizens are increasingly connected to fixed and mobile Internet via computers, smartphones and tablets.

European citizens already use off-label sources to a certain extent, to access nutritional and ingredients information about alcoholic beverages.

A majority of European citizens trust public health authorities' websites and the health and nutrition websites as reliable sources of information to know more about alcoholic beverages nutritional values and ingredients.

5. Conclusions and discussion

The subject of this study was the nutritional values and ingredients of alcoholic beverages. Several EU policies are now in place to govern which information on food and drinks should be provided to consumers. Currently, alcoholic beverages of more than 1.2% alcohol by volume remain exempt from any obligation to provide the list of ingredients and the nutrition declaration containing information on energy content and the amounts of fat, saturates, carbohydrate, sugars, protein and salt contained, both of which are required for other food and drink products.

This report considered insights on the information appetite of consumers of alcoholic beverages and how they regard information on nutritional values and ingredients and the various off-label information sources that can be used to access it. We therefore examined the factual and objective knowledge of nutritional values and ingredients, the appetite for information on nutritional values and ingredients, and the use of and attitudes towards off-label information sources.

Knowledge of nutritional values and ingredients of alcoholic beverages

- The majority of respondents did not know the calorie, carbohydrate or fat content of alcoholic beverages. As a result, knowledge of the nutritional values of alcoholic beverages can be considered limited.
- Although the majority of respondents demonstrated the ability to indicate certain ingredients of alcoholic beverages, most of them were unable to correctly identify all ingredients of alcoholic beverages.

Interest in information about nutritional values and ingredients

- Consumers are interested in receiving the same information on ingredient and nutritional values for alcoholic beverages as currently provided for other food and drink products.

Use of off-label information platforms

- European citizens are connected to the fixed and mobile Internet via computer, smartphones and tablets.
- European citizens already use off-label sources to a certain extent to access nutritional and ingredients information about alcoholic beverages.
- A majority of European citizens trust public health authorities' websites and the health and nutrition websites as a reliable source of information to know more about alcoholic beverages nutritional values and ingredients.

The consumers' insight survey was conducted within six EU countries that were representative of the European Union and its different regions, ensuring a balanced geographical spread: Germany, Poland, Denmark, the Netherlands, Spain and the United Kingdom. Although the focus was on an aggregated level and the total research population was representative of all the regions of the European Union, we can conclude that country variation exists. Respondents in Spain were shown to be the most receptive to using off-label information sources, a direct result of their higher levels of product involvement and interest in health and products more generally. Respondents in the Netherlands and Denmark were the least likely to be interested in nutrition and ingredient information.

Although this report does not include country chapters, national contexts and histories is important to consider:

- In Spain, results are likely to be affected by relatively large-scale investment in consumer education.
- In Spain, results are also likely to be influenced by the Mediterranean diet or the culture which involves drinking alcoholic beverages in accompaniment to a meal.
- In Germany, the 'Reinheitsgebot' or 'German Beer Purity Law' is an existing regulation concerning the production of beer which stipulates that the only ingredients that can be used in the production of beer were water, barley and hops. As a result, Germans may be less interested to search for information as they already have trust and knowledge regarding the product.
- In Denmark and the Netherlands, self-regulations lay down that the information concerning beer nutritional values and beer ingredients should be shared with the consumers. However, this does not seem to have had an effect on knowledge, as their results are not more positive than the results in the other countries.

When we consider the insights of this study, we see that although respondents agree that alcoholic beverages should be labelled the same way as food and drink products are for nutrition and ingredient information, they are not yet actively seeking the information that is already available. Nonetheless, off-label information sources can be considered an opportunity to inform the consumer on a voluntary basis. More and more information can and is accessed at different levels. Several companies are proactively informing consumers about their products via websites, applications and advertisements. New tools and digital consumer information such as QR codes allow information to be provided with a lot of detail, an option which should be further explored.

Also, the growth of digital devices and internet accessibility has changed the way people shop, search, and gather information. The hyper-connected world is driven by multi-device usage: more and more people access the Internet using more than one device.

In conclusion, the fact that consumers are interested in and already use off-label channels to try to access information falls against the backdrop of a real knowledge deficit regarding nutritional values and ingredients. Analysing the potential for off-label sources to further and better act as a means for closing the knowledge gap and educating consumers on the ingredients and nutritional values of the products they consume would be an important subject for further analysis.