

Time for a beer?

When and where Europeans enjoy a beer

A report by SABMiller



A European walks into a bar...

Beer is big business in Europe with volumes increasing by more than 6% in recent years.¹ It plays a central part in many Europeans' social lives, but its role differs with each country displaying its own unique and varied beer drinking culture.

As one of the world's largest brewers, selling beer in over 60 countries across six continents, SABMiller is an industry expert. In Europe alone, the company has 19 breweries, over 12,000 employees, and last year produced a staggering 7 billion pints.

As a company committed to understanding consumer behaviour, SABMiller has developed and commissioned a landmark piece of pan-European research to reveal the latest beer drinking cultural trends in two exclusive reports.

The first report released in January 2008 focussed on the etiquette of beer drinking, with key findings and each nationality's idiosyncrasies analysed throughout. This second report looks at when and where people are drinking beer, and how patriotism affects their choices.

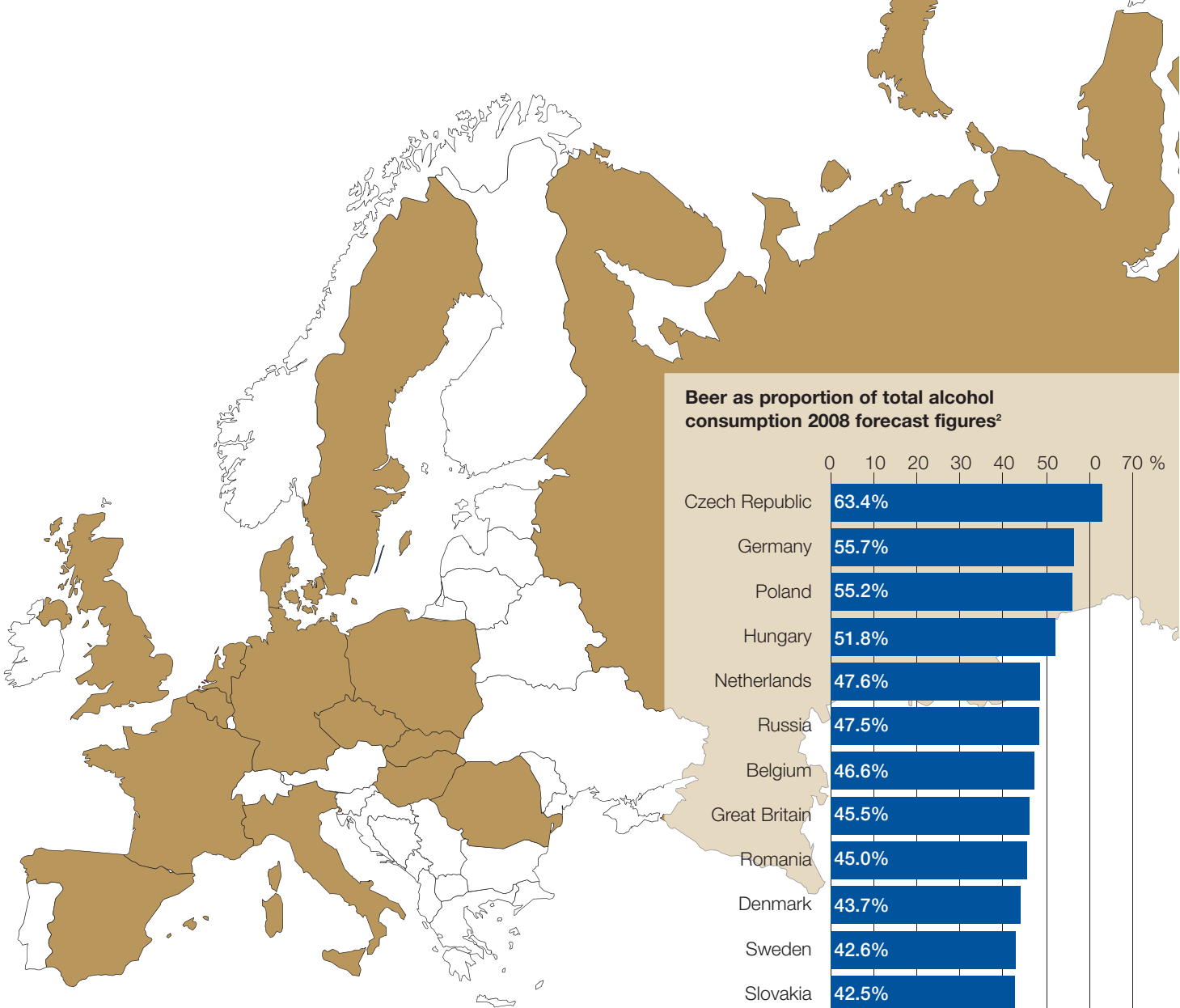
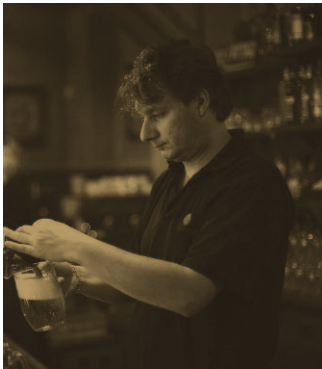
Both reports have been developed from research conducted by an independent marketing insight and brand development consultancy, Added Value, through online interviews with over 7,500 people across 15 European countries. A total of 500 people were interviewed in each country.

Snapshot of findings...

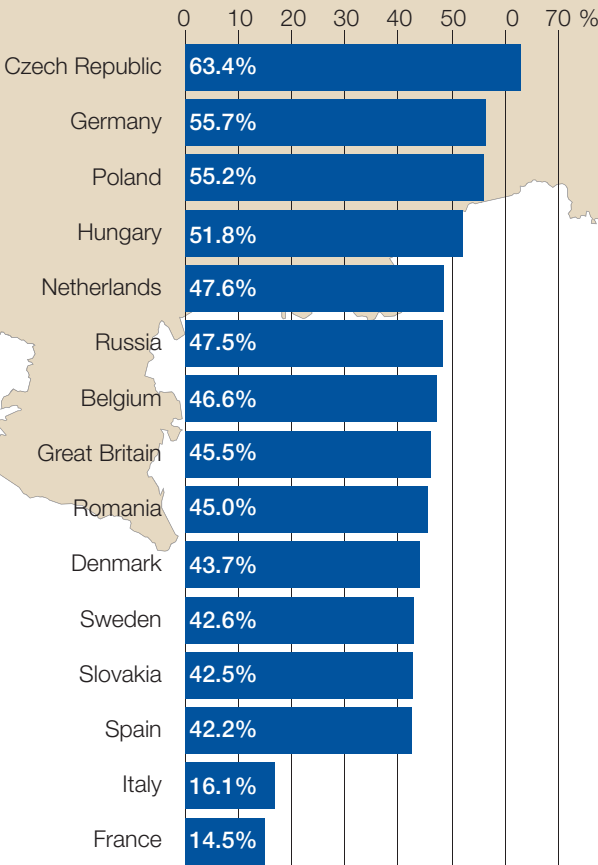
- On average Europeans enjoy their first daily beer at 18:08... see page 4
- More Italians than any other nationality drink beer at restaurants... see page 9
- Only 1 in 10 Europeans drink a beer during lunch... see page 4
- The most frequent beer drinkers are the Spanish... see page 7
- Danes are the most sociable people in Europe... see page p 10
- Czech Republic is most patriotic, preferring beers brewed in their own country... see page 11

About SABMiller

SABMiller's brands include premium international beers Peroni, Nastro Azzurro, Pilsner Urquell, Grolsch and Miller Genuine Draft, as well as favourite regional brews including Tyskie Gronie in Poland, Dreher Classic in Hungary and Ursus Premium in Romania.



Beer as proportion of total alcohol consumption 2008 forecast figures²



¹ European beer volumes grew by 6.2% in 2006. Source: Plato Logic 2007 data

² Source Canadian Wisdom, 2007. Litres of alcohol equivalent.
Countries in colour on the map relate to markets interviewed.

What time do Europeans have their first beer?

Beer O'clock

It really is a hard working day in Europe, as our research confirms that for most, Beer O’Clock starts after work, and not at lunchtime.

When it comes to marking the end of a hard working day, it’s no surprise that we Europeans like to relax with a beer. What is surprising is the national differences as to when we start and finish our drinks.

SABMiller asked the question: on a typical working day, when is the earliest time you would normally have your first beer in the afternoon or evening?

According to our results, only 10% of Europeans would consider a lunchtime beer, with the vast majority opting for a beer after work. In fact, across Europe, Beer O’clock starts at an average time of 18:08.

Final proof that with age, comes wisdom, as the older generation can’t wait to escape to the pub after work with 45 yrs+ having their first beer at 17:49 compared to 18:27 for 18–24 yrs.

Our survey also confirms that men are first to the bar. On average, they buy a beer earlier than women – 17:57 compared to 18:34.

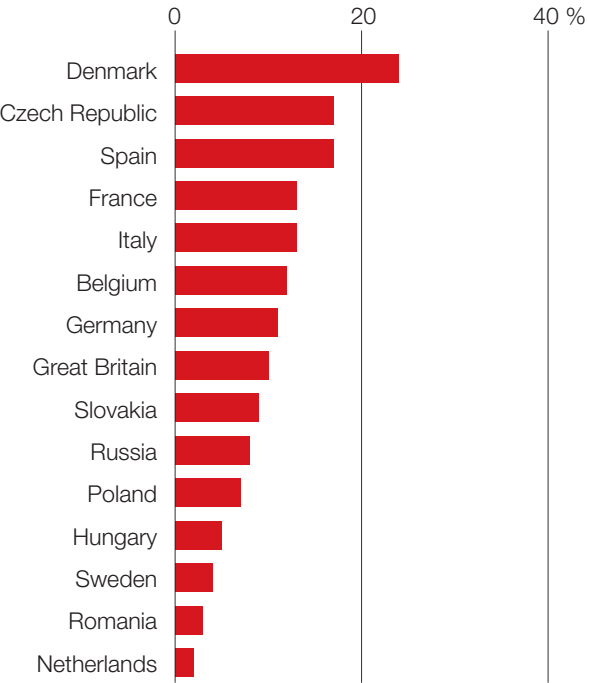
On a typical working day, average drinking up time is 22:10 (the time people have their last beer).

With age comes restraint – those 45 years and over finish early at 21:32 whilst on average the time for 18–24 year olds to order their final beer is 22:59.

Lunchtime drinking is perhaps not as popular as it used to be, with only 1 in 10 Europeans claiming to regularly drink a beer during lunch. You are least likely to see a Dutch person in a pub (2%) and most likely to see the Danes (24%) and the Spanish and Czechs (both 17%).

- At the weekends:
- The average time that Europeans have their first beer is at 18:11 on Saturday and 17:00 on Sunday
 - And their last beer is ordered, on average, at 21:54 on Saturday and 19:56 on Sundays

Liquid lunch
Percentage of people who have their first beer between 12.00–1.30pm



One night in Europe

The European average time to have the first beer is **18:08** and the average time to have the last beer is **22.10**.



16:41
First out of the gate in the race to the pub, the Danish have a beer earlier than any other nation

19:19
Working late? The people of The Netherlands have their first beer later than any other nation

20:33
If you fancy an early night, head to France whose last beer is earlier than any other country

22:59
If you fancy a late night, head to Germany whose last beer is later than any other country

First & last beers



Which days are people drinking beers?

Dates for the diary

One thing Europeans can all agree on is that we emphatically believe beer can be enjoyed every day of the week.

Maybe it's due to that weekend feeling, or catching a match on TV, because when it comes to choosing the most popular day of the week for drinking beer, 49% of us chose Saturday. While Saturday remains the popular choice for most countries, SABMiller research has uncovered that not all of us are weekend beer drinkers...

- Strangely, the most popular beer drinking day for the French is Wednesday, with 36% drinking beer compared to 35% on a Saturday
- The biggest mid-week beer drinkers are the Spanish – drinking beer more regularly on Mondays, Tuesdays and Wednesdays than any other nation
- Monday is the quietest day of the week, with 28% of Europeans enjoying a beer, compared to averages of 31% for Tuesday, 33% for Wednesday and 30% for Thursday.
- Most Europeans drink beer 2 or 3 times a week (33%), the most frequent beer drinkers being the Spanish, of whom 31% drink beer most days of the week.
- While nearly 10% of Europeans drink every day, the least frequent drinkers are the Swedes, with only 8% drinking beer most days. Even so, 41% of Swedes drink beer once a week.

Weekday beers

Three countries prefer to drink beer between Monday and Thursday. In Hungary, 65% of respondents drank beer on a weekday compared to 51% at weekends. There is a similar story in France, with 60% of people drinking beer on a weekday, 9% more than drink beer on weekends.

Sunday drinking























35% of people think Sunday is a good time to kick back and take it easy with a beer. Sunday shows the greatest difference in country behaviours – 36% difference between biggest Sunday drinkers Romania (53%) and smallest Sunday beer drinkers Sweden, with only 17%.



Where most people are drinking beer tonight

Beer drinkers' guide...

Most popular days

Day	Top beer drinking country on each day		Those enjoying beer in a pub!¹		Most popular day for drinking beer (ranked)	
Monday	Spain 41%		Slovakia 54%		7th (28%)	
Tuesday	Spain 47%		Spain 50%		5th (31%)	
Wednesday	Spain 44%		Slovakia 49%		4th (33%)	
Thursday	Belgium and Sweden 50%	 	Slovakia 50%		6th (30%)	
Friday	Romania 38%		Great Britain 54%		2nd (41%)	
Saturday*	Belgium 62%		Spain 55%		1st (49%)	
Sunday	Romania 53%		Spain 42%		3rd (35%)	

* Saturday is the most popular day for beer

1 Figures for those enjoying a beer either in a pub, bar or tavern depending on the market

Where do people prefer to drink beer?

Your place or mine?

The Brits would be surprised to hear that Spain is home to European pub culture with the highest number of beer drinkers who regularly drink beer at pubs/bars/taverns (81%). Contrary to popular belief that Italy is home to wine-lovers, more Italians than any other nationality regularly drink beer at restaurants (45%), almost twice the European average.

The move away from drinking in pubs and bars continues; as our research finds that more Europeans drink beer regularly in their homes or garden rather than at pubs, nightclubs, restaurants – 83% compared 63%.

The only countries which preferred to drink outside the home were Slovakia, with a small margin (64% off trade v 62% on trade) and Czech Republic (75% off trade v 55% on trade).

When we are not drinking in our own home and garden, you might just find us drinking beers in yours. While 76% of Europeans drink beer more regularly in their own home or garden, 37% of us like to drink in someone else's. That's a lot of dinner parties and barbeques. The social aspects of drinking at someone else's house are more attractive to women, as they regularly drink beer in someone else's home or garden (40% of women compared to 36% of men). This was the only location where women drank beer more regularly then men.

The most popular on-trade location is bars/pubs/taverns with 53% of Europeans drinking beer in them 'regularly'. This is twice more than next most popular location, restaurants at 24%, and much more than nightclubs (12%) and sports events (10%).

The fun loving Danes are the most sociable beer drinking neighbours. More Danes than any other nationality regularly drink beer in someone else's home or garden (64%). The Czechs and Slovaks are least likely to drink beer at someone else's place (17%)

But beer goes hand in hand with sport in Belgium and Poland. Drinkers in these countries drink beer more regularly at sports events (17% and 19%) than at nightclubs or restaurants

Most popular day for drinking beer in:
Pubs/bars/taverns
Friday (35%)
Restaurants
Thursday (12%)
Nightclubs
Saturday (6%)
At home
Monday (58%)
At someone else's home
Saturday (24%)



Who do we drink beer with?

Drinking buddies

Beer is certainly a social drink, and we all enjoy sharing an occasion to drink beer together. But who do we drink with?

Actually, for us Europeans, our loved ones really are our favourite beer buddies. Most beer drinking occasions are with our partner (29%) followed by with a small group of mixed sex friends (26%).

Of all of Europe, the romantic Brits are most likely to drink beer with a partner (38%) followed by the Polish (37%), while

- Danes and Belgians are most likely to drink beer with large groups (same sex or mixed sex) – both 9% of occasions
- Czech Republic is most likely to drink beer with a small group (same sex or mixed sex) – 46%

People mostly drink beer with:

- Small groups in someone else's home (58%)
- Their partner at home (42%) or in restaurants (28%)
- Large groups in nightclubs (21%)

Drinking beer with mixed groups is over twice as popular as drinking beer with same sex groups (of any size) – 38% v 15%

Romantics

Drink beer with a partner

Great Britain 38%
Poland 37%



Countries above the European average of 29%:

- Sweden 36%
- Romania 35%
- Italy 34%

Most Sociable

Least likely to drink on your own...

Poland 96%
Romania 94%
Belgium 91%



Party Animals

Most likely to drink in large groups – same sex or mixed

Denmark 9%
Belgium 9%



Most likely to drink in small groups – same sex or mixed

Czech Republic 46%

Me time...!

Those who prefer their own company

Netherlands 21%
France 18%
Russia 15%

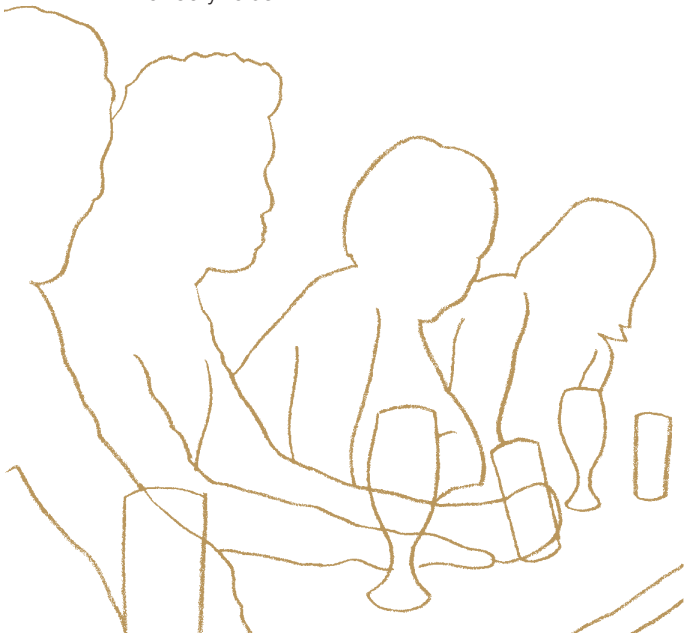


Where do we like our beer to come from?

Patriotic tastes

Europeans are patriotic when it comes to enjoying beer – 45% of Europeans prefer beer brewed in their own country and only 17% preferred imported beer.

- Czech Republic is most patriotic with 91% preferring beers brewed in their own country
- Followed by Belgium (81%) and Germany (79%)
- Sweden is least patriotic with only 18% preferring beers brewed in their own country
- Followed by Italy (19%) and France (20%)
- Patriotism definitely increases with age – 40% of 18–24 yr olds prefer local beers, rising steadily across age groups to 49% of 45–60 yr olds





Live beer!

Brand news from SABMiller



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