



whose round?

How Europeans enjoyed their beer in 2009





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

Highlights

Spanish drinkers are the most likely to enjoy a beer at the weekend page 02

The popularity of 'rounds' is increasing across Europe – with Britain still the leading round-buying nation page 04

French bosses are the least sociable in Europe – whilst UK bosses are amongst those most likely to buy a round page 05

The least chivalrous men are to be found in Russia – they expect a date to pay her way! page 06

Europeans beginning to prefer weekend outings to drinking during the week page 08

Prague is the most popular European city for beer page 09

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Introduction

Brewing in Europe began over a thousand years ago and beer has played an important role in the development of European cultures. Beer is at the heart of many of the rituals, traditions, sayings and places which shape the societies we recognise today.

Beer continues to be an important industry in Europe but, like many consumer goods, it has not been unaffected by the recession. Many of Europe's beer markets have experienced declines in the last 24 months and in the UK, pubs continue to close at an alarming rate.

However, beer still plays a crucial part in many Europeans' lives - in friendships, communities and sociability; although the role it plays varies from country to country with each nation 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. Its breweries in Europe sold over 47 million hectolitres of beer in 2009 – the equivalent of nearly eight and a half billion pints, and it employs over 15 thousand people in its European operations.

It is important to us that people drink our beers responsibly. We have a range of highly targeted programmes in all our businesses around the world which aim to provide consumers with information to help them make informed choices. Our website www.talkingalcohol.com provides accurate and balanced information about alcohol and is available in nine European languages.

As a company committed to continuously analysing consumer behaviour, SABMiller has harnessed its expertise to reveal the latest beer drinking cultural trends in this exclusive report. Some of the research mirrors that carried out in 2007 for previous reports ('Beer Etiquette' and 'Time for a beer?') to enable direct comparisons and the identification of behavioural changes.

The report has been developed from research conducted through online interviews with over 6,000 people across 12 European countries, a total of 500 people were interviewed in each country. (Research was conducted by Added Value, an independent marketing and insight and brand development consultancy).

This report looks at attitudes to beer and beer drinking customs with key findings and each nationality's idiosyncrasies analysed throughout.

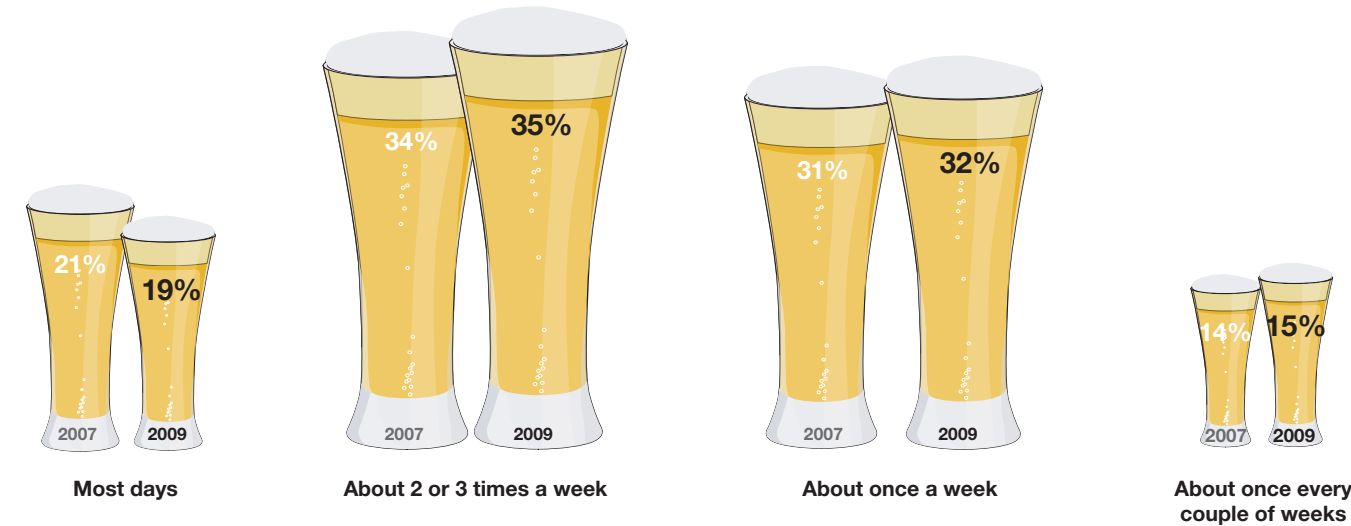
European beer consumption figures

2009 vs 2007 (Litres per capita)

Source: Plato consumption data for 2007 & 2009, applied to ILO figures for population aged 20 and over



Q: How often do you drink beer?



The good news is that, despite the economic downturn, beer seems to be proving resilient, with Europeans enjoying a beer approximately the same number of times per week as 2007.

How do we compare?

When it comes to paying for beer in the pub or bar, see how countries compare... And see what's changed since 2007.

We have looked at a couple of key social behaviours which illustrate how nationalities pay for their beers and how generous they are prepared to be, and compared them to 2007 to see what has changed.

It's heartening to see that the recession hasn't dented Europeans' generosity – the number of people we are prepared to buy beers for at any one time has remained largely unchanged.

European generosity

Q: Would you be prepared to buy beers for other people even if you weren't sure of getting one in return?

Q: If you were buying beers for several people, what is the maximum number of people you would be prepared to buy for at one time?

The most generous nation is Romania.
52% of people would definitely buy a round whilst 5% of the French (the highest of any country) say they definitely wouldn't!



Number of people you would be prepared to buy a beer for in one round/order.



Buying a round even if you weren't sure of getting one in return.



Italy

37% Definitely would
36% Probably would
20% Not sure
5% Probably not
2% Definitely not



Slovakia

21% Definitely would
53% Probably would
16% Not sure
8% Probably not
2% Definitely not



Czech Rep.

19% Definitely would
42% Probably would
26% Not sure
11% Probably not
2% Definitely not



France

34% Definitely would
37% Probably would
18% Not sure
6% Probably not
5% Definitely not



Spain

27% Definitely would
38% Probably would
21% Not sure
11% Probably not
3% Definitely not



UK

19% Definately would
50% Probably would
19% Not sure
10% Probably not
2% Definitely not



Romania

52% Definitely would
32% Probably would
12% Not sure
3% Probably not
1% Definitely not



Poland

29% Definitely would
52% Probably would
13% Not sure
4% Probably not
2% Definitely not



Russia

35% Definitely would
47% Probably would
13% Not sure
4% Probably not
1% Definitely not



Hungary

21% Definitely would
48% Probably would
22% Not sure
7% Probably not
2% Definitely not



Netherlands

34% Definitely would
49% Probably would
12% Not sure
4% Probably not
1% Definitely not



Germany

31% Definitely would
44% Probably would
20% Not sure
4% Probably not
1% Definitely not

whose round?

(% who responded that one person pays each time).

The majority of Europeans favour buying beers in rounds – rather than paying individually.

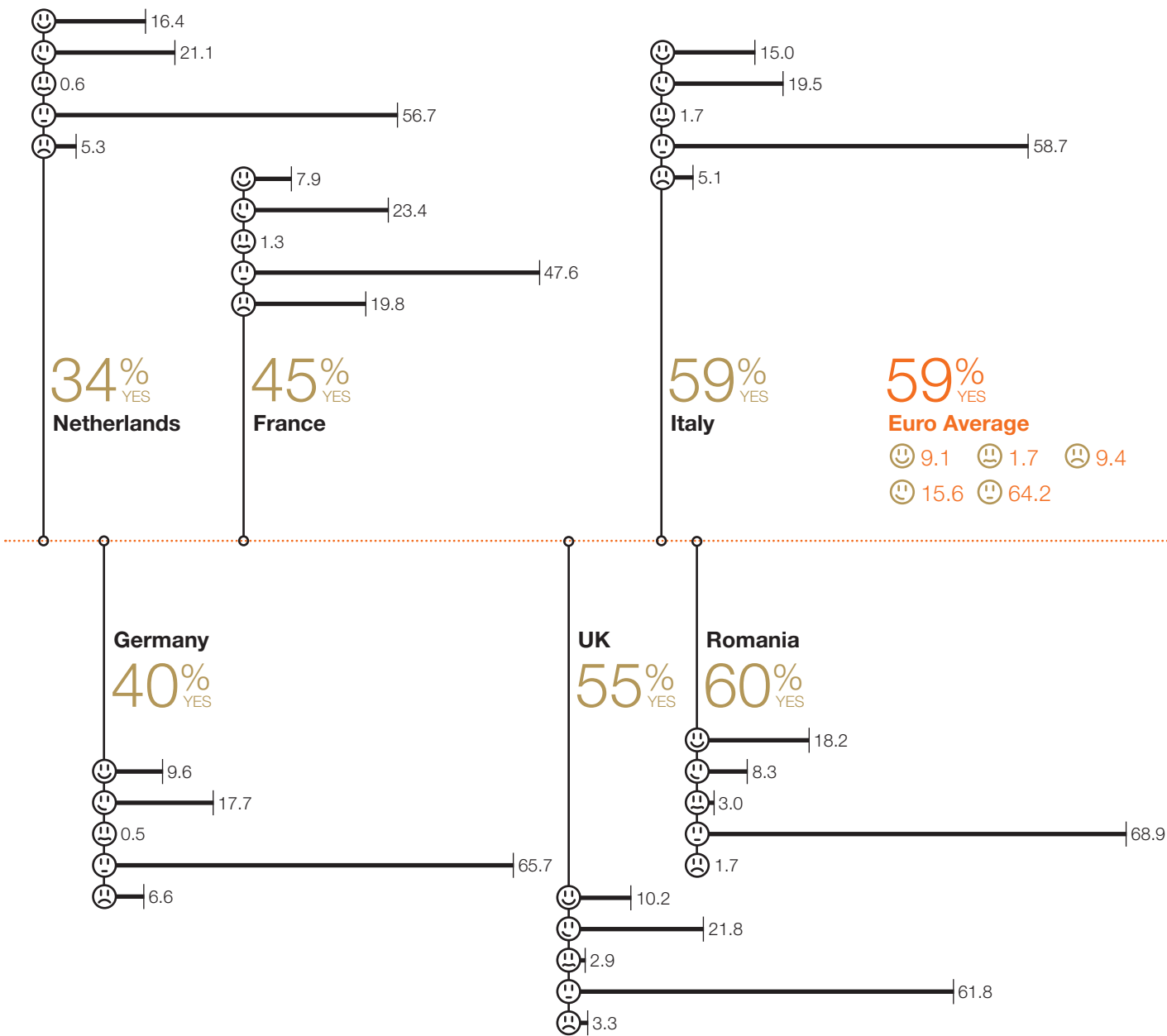
But round-buying is still dominated by the Brits, we're leading the pack and increasing our lead!

○ 2007 ○ 2009



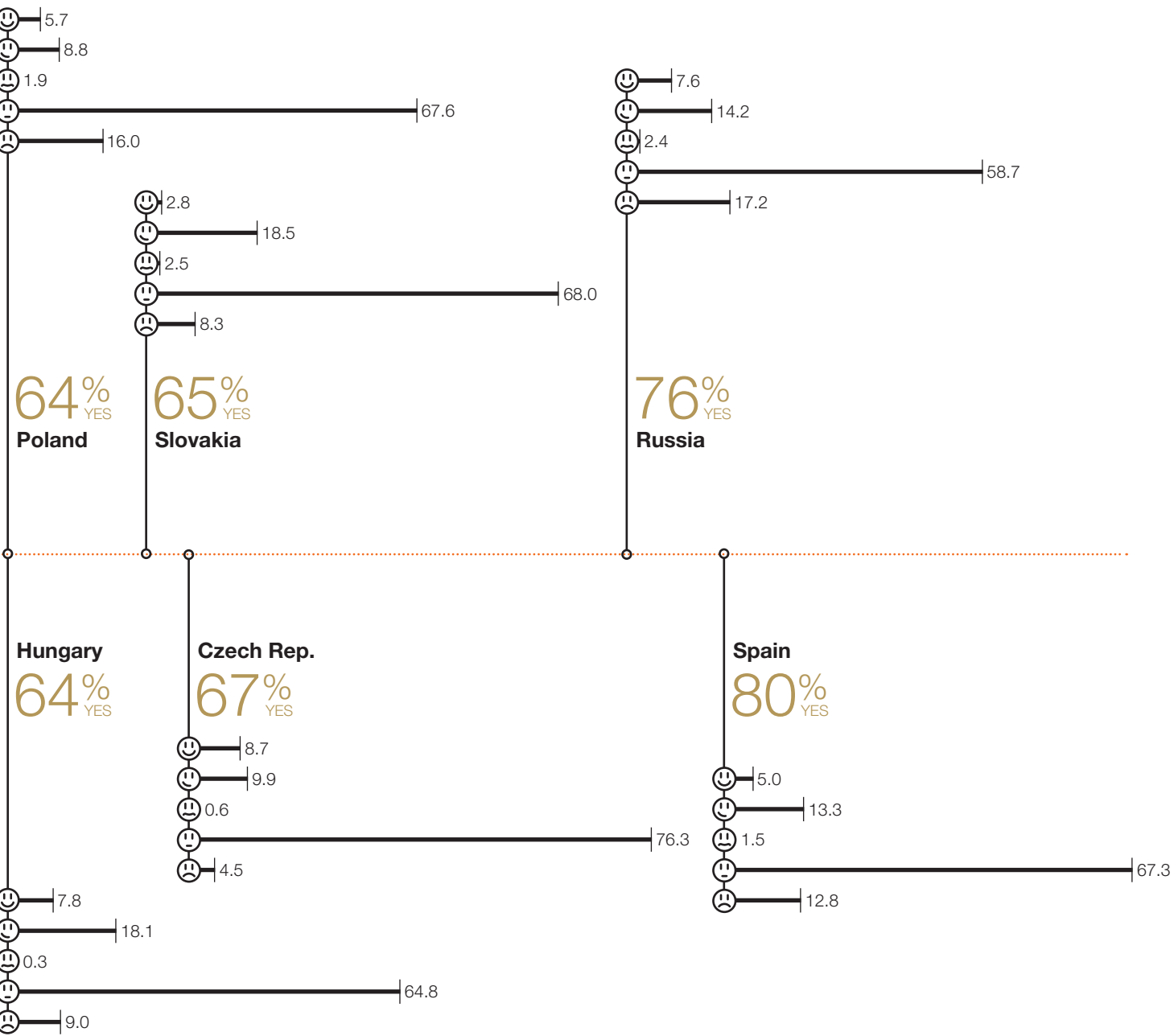
Q: How do you usually pay for one round or order?

Q: Have you been out with work colleagues in the last 3 months? And who typically paid?



Who would typically pay for beers? (%)

😊 The boss always pays 😊 The boss occasionally pays 😊 The boss never pays
😊 We pay for ourselves or share the round 😊 The boss never comes out with us



Going Dutch?

Compared to 2007, Europeans in general are more likely to go out for a beer with their partner (74% in 2009 vs 69% in 2007).

The recession hasn't impacted on romance at a European level – there has been no significant change in opinions on who should pay for beers on a date.

However, at a country level, there are some interesting differences in attitude from 2007 to 2009 and between men and women.

First dates

84%
2007

82%
2009

At a European level men generally still think they should pay on the first date.

58%
2007

73%
2009

Women in the Czech Republic are more likely than ever to expect their partner to pay for all the beers.

31%
2007

21%
2009

British ladies are taking pity on the men; less of them now think it is the man's role to buy the beers.

92%
2007

66%
2009

And in Russia, less men are prepared to splash out and buy all the beers.

Current partners

48%
2007

57%
2009

Husbands and boyfriends in Hungary will be feeling the pinch – the percentage of women in both countries who expect their other half to pay for all the beers has increased.

91%
First date

76%
Current partner

78%
First date

92%
Current partner

In the Netherlands the majority of men would pay for everything on a first date, but slightly less with their current partner.

In Germany, by contrast, the majority of men would pay for all the beers with their current partner, whereas far fewer would be prepared to pay for everything on a first date.

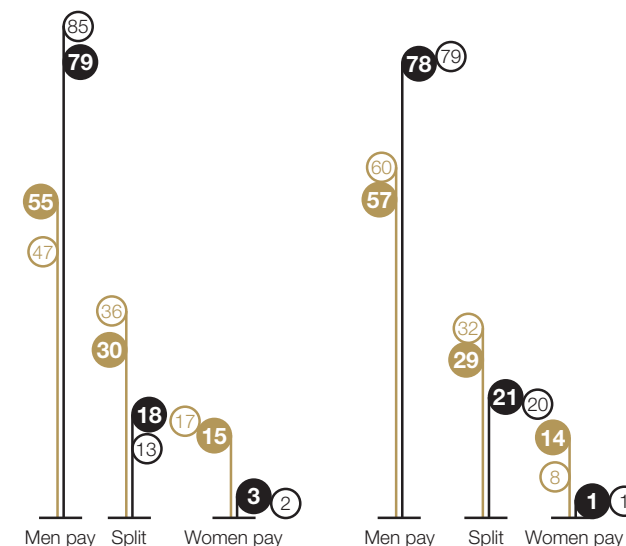
Q: Who should pay for beer?

% Men in 2009 % Men in 2007 % Women in 2009 % Women in 2007

France

Current partner

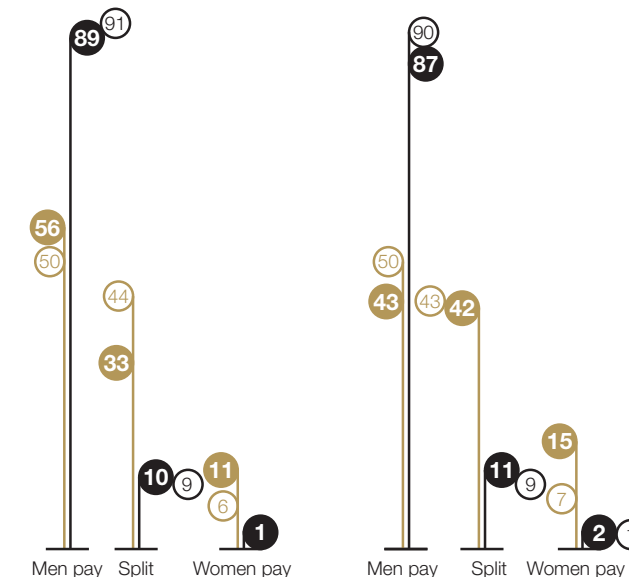
Potential partner



Italy

Current partner

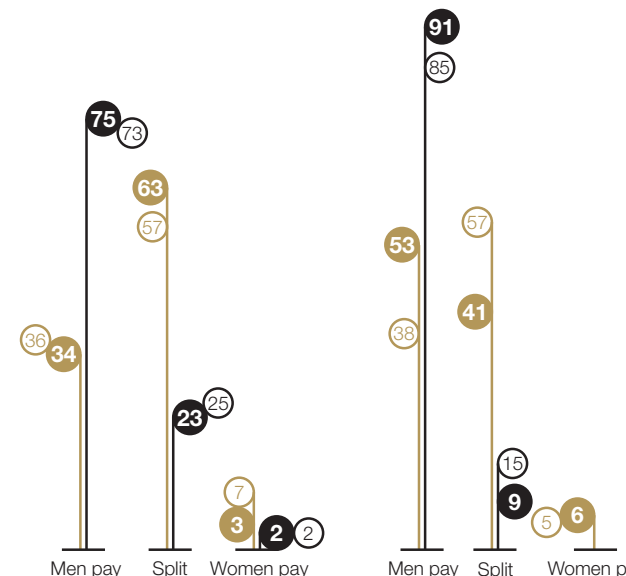
Potential partner



Netherlands

Current partner

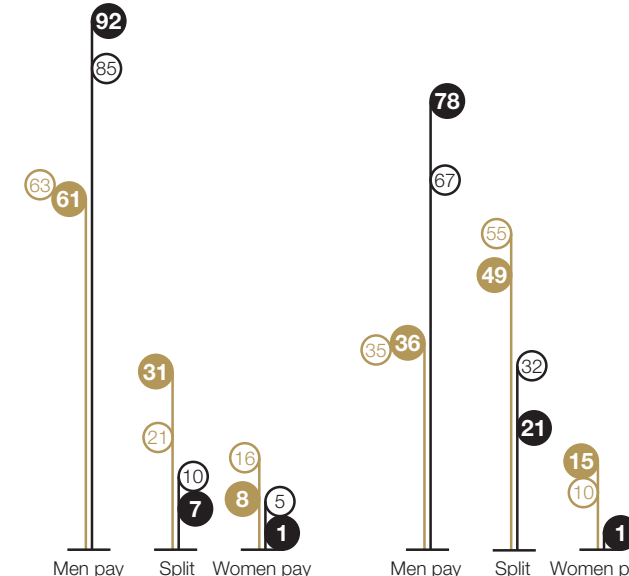
Potential partner



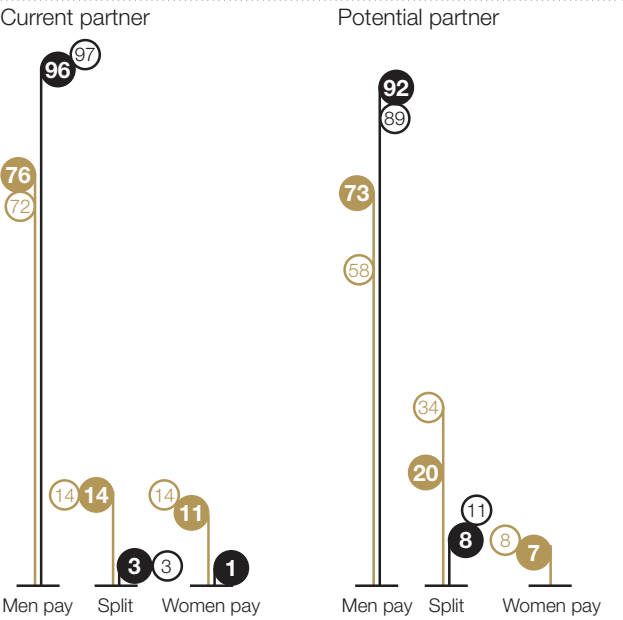
Germany

Current partner

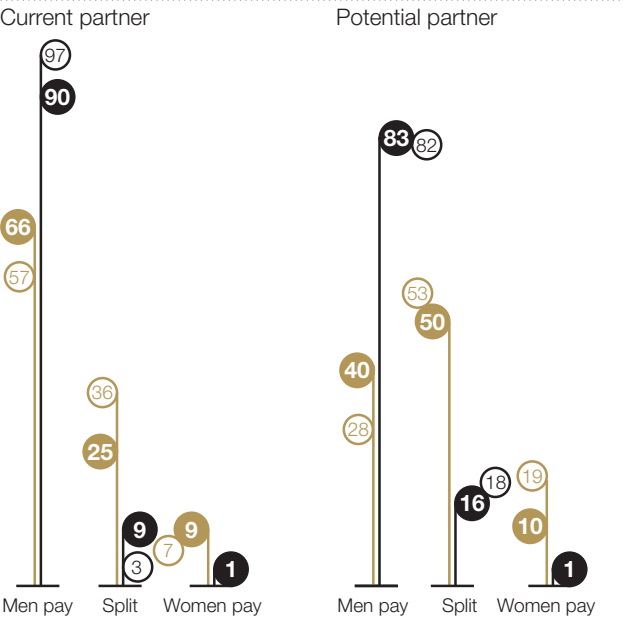
Potential partner



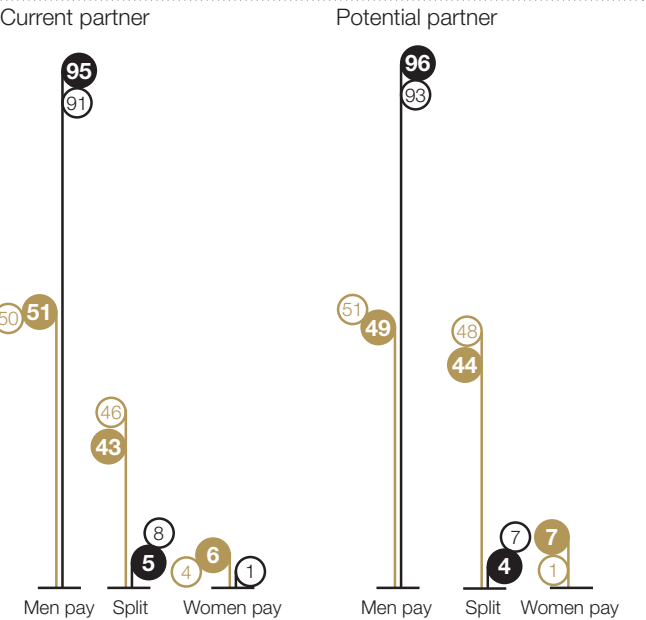
Czech Rep.



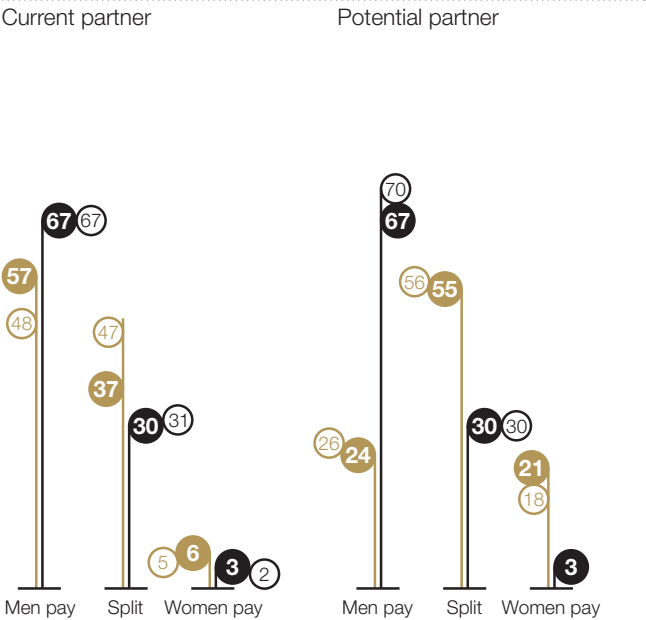
Slovakia



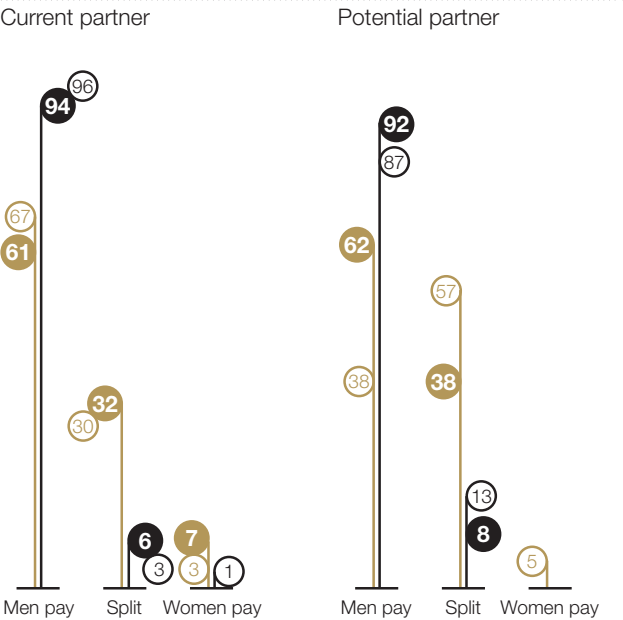
Poland



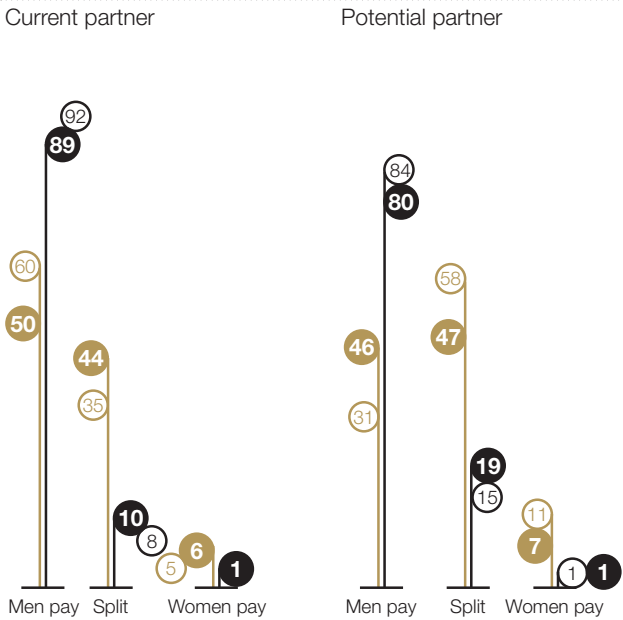
Spain



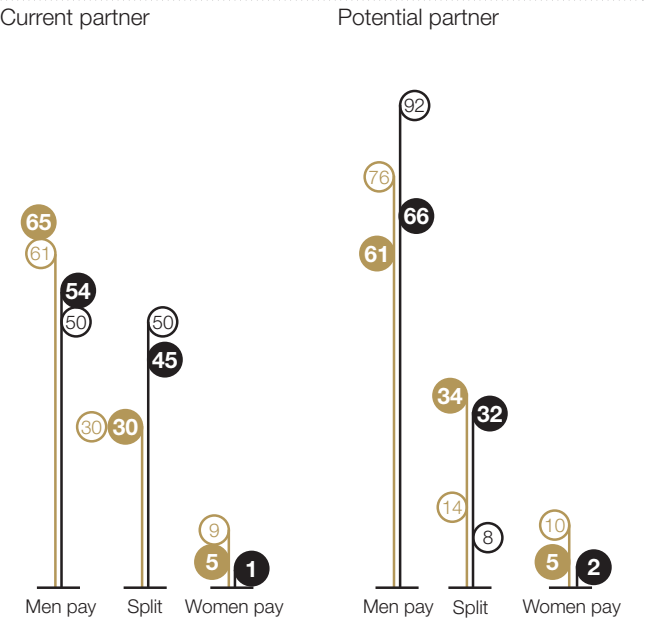
Hungary



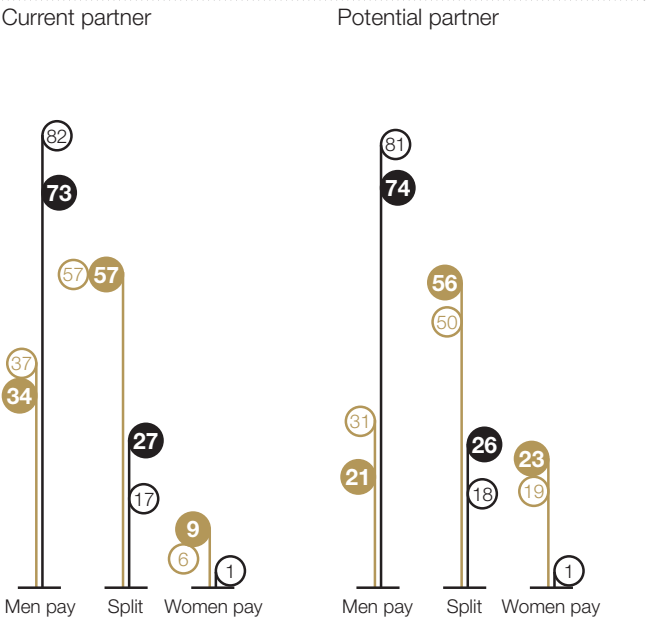
Romania



Russia



UK



When people are enjoying a beer... And where?

In 2007, 48% of Europeans were to be found having a beer on a Saturday night. Not surprising maybe, but what is startling is the fact that in 2009 this increased to 58%. Sunday beer drinking has also increased in popularity, although the Brits are the least likely to sink a Sunday pint.

This significant increase is offset by a reduction in the number of people drinking on weekdays (Monday – Thursday).

Weekdays beer drinking 54% 60% (Total % of Europeans enjoying a beer on one or more weekdays)

2009	MONDAY 27%	TUESDAY 27%	WEDNESDAY 29%	THURSDAY 26%
	29%	32%	34%	30%
2007	Euro average 27% Most likely: Poland 33% Least likely: France/Russia 21%	Euro average 27% Most likely: Spain 34% Least likely: Russia 17%	Euro average 29% Most likely: Czech Rep. 42% Least likely: Netherlands 23%	Euro average 26% Most likely: Spain 39% Least likely: Russia 17%
	Euro average 28% Most likely: Spain 41% Least likely: Slovakia 17%	Euro average 31% Most likely: Spain 47% Least likely: Slovakia 20%	Euro average 33% Most likely: Spain 44% Least likely: Slovakia 21%	Euro average 30% Most likely: Romania 38% Least likely: Slovakia 20%

Q: Thinking back over the last seven days not including today, on which of these days did you drink any beer?



Weekend beer drinking 77% 69% (Total % of Europeans enjoying a beer on one or more days on the weekend)

FRIDAY 41%	SATURDAY 58%	SUNDAY 41%	All of the week 10% 11%
39%	48%	36%	None of them 8% 10%
Euro average 41% Most likely: Spain 60% Least likely: Slovakia 29%	Euro average 58% Most likely: Spain 73% Least likely: Slovakia 42%	Euro average 41% Most likely: Spain 58% Least likely: UK 33%	
Euro average 41% Most likely: Romania 49% Least likely: France 25%	Euro average 49% Most likely: Spain 60% Least likely: Hungary 32%	Euro average 35% Most likely: Romania 53% Least likely: Hungary 26%	

Q: Which city would you most like to have a beer in?

04 Dublin

11% average

Italy	17	Poland	8
France	14	Russia	1
Spain	9	Czech Rep.	13
UK	14	Hungary	13
Slovakia	12	Netherlands	6
Romania	6	Germany	17

05 London

10% average

Italy	11	Poland	8
France	9	Russia	5
Spain	6	Czech Rep.	14
UK	16	Hungary	9
Slovakia	8	Netherlands	12
Romania	11	Germany	13

06 Paris

9% average

Italy	5	Poland	8
France	22	Russia	5
Spain	8	Czech Rep.	10
UK	7	Hungary	7
Slovakia	8	Netherlands	12
Romania	13	Germany	6

07 Madrid

6% average

Italy	5	Poland	5
France	5	Russia	2
Spain	10	Czech Rep.	5
UK	9	Hungary	5
Slovakia	3	Netherlands	12
Romania	5	Germany	4

02 Amsterdam

13% average

Italy	13	Poland	12
France	11	Russia	10
Spain	20	Czech Rep.	11
UK	12	Hungary	14
Slovakia	17	Netherlands	16
Romania	16	Germany	5

09 Brussels

4% average

Italy	3	Poland	1
France	17	Russia	1
Spain	4	Czech Rep.	3
UK	3	Hungary	5
Slovakia	3	Netherlands	8
Romania	3	Germany	0

08 Rome

5% average

Italy	3	Poland	3
France	2	Russia	3
Spain	8	Czech Rep.	3
UK	11	Hungary	5
Slovakia	3	Netherlands	11
Romania	6	Germany	6

10 Copenhagen

3% average

Italy	5	Poland	3
France	2	Russia	2
Spain	2	Czech Rep.	1
UK	4	Hungary	2
Slovakia	2	Netherlands	3
Romania	3	Germany	2

03 Berlin

12% average

Italy	22	Poland	6
France	12	Russia	20
Spain	15	Czech Rep.	4
UK	5	Hungary	8
Slovakia	4	Netherlands	6
Romania	17	Germany	24

15 Bucharest

1% average

Italy	0	Poland	0
France	0	Russia	0
Spain	0	Czech Rep.	0
UK	0	Hungary	0
Slovakia	0	Netherlands	1
Romania	5	Germany	1

13 Bratislava

1% average

Italy	1	Poland	1
France	0	Russia	1
Spain	1	Czech Rep.	3
UK	0	Hungary	3
Slovakia	2	Netherlands	1
Romania	2	Germany	1

12 Budapest

2% average

Italy	2	Poland	2
France	1	Russia	1
Spain	2	Czech Rep.	1
UK	3	Hungary	3
Slovakia	0	Netherlands	2
Romania	2	Germany	3

11 Moscow

2% average

Italy	1	Poland	0
France	2	Russia	3
Spain	5	Czech Rep.	1
UK	3	Hungary	1
Slovakia	2	Netherlands	2
Romania	2	Germany	2

14 Warsaw

1% average

Italy	1	Poland	3
France	0	Russia	3
Spain	1	Czech Rep.	0
UK	1	Hungary	0
Slovakia	0	Netherlands	0
Romania	1	Germany	1

01 Prague

20% average

Italy	9	Poland	41
France	4	Russia	43
Spain	9	Czech Rep.	31
UK	11	Hungary	24
Slovakia	35	Netherlands	8
Romania	9	Germany	14

Respondents were asked to choose in which of the cities listed they would most like to have a beer.

Prague was a clear winner, taking the number one spot in five countries and 20% of the total vote, followed a pretty distant second by Amsterdam, with 13% of the vote.

Beer babes and buddies

It's time to find out who you would choose as your drinking partner of choice. We asked you to pick the most attractive person you know who can hold their own with a beer. And you've spoken. Here are the results.

In the UK

Stephen Fry

emerged as people's beer-drinking buddy of choice

National sweetheart

Cheryl Cole

represents the beer babes at the bar

Who would you choose as your drinking partner of choice?

Respondents were given 20 men and 20 women to choose from – some of whom were internationally famous, and others of whom were famous in their own countries.

Of the 'international' celebrities, there was a resounding approval for **Barack Obama** and **Angelina Jolie** who came out on top.

At a local level it was the male sports stars and female music stars that performed best.

Some countries seem to have great affection for their politicians, with **45% of Russians** choosing **Vladimir Putin** as a drinking buddy and **31% of Slovaks** choosing female politician **Iveta Radicová**.

	Men	Women
Stephen Fry	39	29
Jeremy Clarkson	41	25
Barack Obama	33	25
Will Smith	28	31
Jonathan Ross	18	19
Ross Kemp	17	13
Nelson Mandela	16	11
Robbie Williams	11	21
Daniel Craig	10	21
David Beckham	15	9
Brad Pitt	9	19
Steven Gerrard	14	5
Arnold Schwarzenegger	12	7
Prince Harry	9	13
Peter Andre	5	19
Usain Bolt	8	4
Justin Timberlake	4	13
Tom Cruise	4	8
Rafael Nadal	4	3
Gordon Brown	3	3

Who would you choose as your drinking partner of choice?

	Men	Women
Cheryl Cole	40	44
Angelina Jolie	34	13
Helen Mirren	25	33
Holly Willoughby	26	27
JK Rowling	16	28
Beyonce	19	16
Babs Windsor	11	27
Maria Sharapova	21	2
Queen Elizabeth II	16	11
Katie Price (aka Jordan)	8	19
Hilary Clinton	11	9
Madonna	10	10
Anne Widdecome	9	13
Kate Moss	10	9
Carla Bruni	12	2
Amy Winehouse	7	13
Paris Hilton	9	5
Victoria Pendleton	8	3
Victoria Beckham	5	8
Kerry Katona	4	8





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