CONSUMER INSIGHTS STUDY

Report for the Brewers of Europe by GfK Belgium

Table of Contents

List of figures

List of tables

1 Executive Summary

A growing call for alcoholic beverages to provide the same nutrition information per 100ml as non-alcoholic beverages

The survey shows that a vast and growing majority of the 9008 European consumers surveyed, believe consumers should have access to the same nutrition information per 100ml for alcoholic beverages (beer, wine and spirits) as they currently receive for any other food and drink product. Whilst 69% of consumers in 2014 believed the same nutrition information per 100ml should be provided for alcoholic beverages as for any other food and drink products, the proportion has grown to 86% in 2016.

It is also interesting to see that light (89%) and moderate (86%) drinkers are keener to receive the same ingredients and nutrition information than excessive drinkers (81%).

A growing call for alcoholic beverages to provide the same ingredient information as non-alcoholic beverages

The survey shows that a vast and growing majority of the 9008 European consumers surveyed, believe consumers should have access to the same ingredients information for alcoholic beverages (beer, wine and spirits) as they currently receive for any other food and drink product.

Whilst 74% of the consumers in 2014 believed the same ingredients information should be provided for alcoholic beverages, this proportion has grown to 86% in 2016.

It is also interesting to see that light (89%) and moderate (86%) drinkers are keener to receive the same ingredients and nutrition information than excessive drinkers (81%).

A high consumer interest in ingredients and nutrition information for alcoholic beverages

The level of interest for the three kinds of information - ingredients (74%), energy value (71%) and the full nutrition declaration (71%) - is also very high. The level of interest does vary significantly from country to country with a very high interest in Italy (93% for ingredients, 91% for energy value and 91% for full nutrition information) and much lower levels of interest in the Netherlands (44%, 48% and 49% respectively).

Consumer interest in these three types of information is again higher amongst light and moderate drinkers than amongst excessive drinkers.

Consumers increasingly use multiple sources to access the information

The study also reveals that a majority of consumers would use a variety of information sources to access this kind of ingredients and nutrition information, with nearly two thirds of the consumers considering two or more sources. Only about a third of the consumers would focus solely on one information source. This underlines the need for consumers to have access to a wide variety of sources for ingredients and nutrition information.

A growing use of digital platforms, combined with traditional information sources

The survey indicates an increased use of digital and online information sources to access ingredients and nutrition information for alcoholic beverages. Two thirds would use online platforms, either exclusively or combined with traditional sources. In 2014, over half of the consumers would never or only rarely access information via these online sources.

One can see that almost half of all consumers would use a mix of traditional sources of information (such as labels, in-store communication, and advertising) and digital online sources (such as websites and applications) to discover the ingredients and the nutritional values of alcoholic beverages. Just under a third would solely rely on traditional sources, whilst around a sixth would solely rely on digital and online platforms. Amongst the traditional sources and alongside digital online sources, the label still plays an important role. Whilst only around a fifth of consumers would rely exclusively on the label, when consumers indicated they would use one or more sources of information, the label was referenced by around 70% of the consumers.

High interest in brand-supported information sources

The label is one of a wide range of tools that companies use to provide mandatory, but also voluntary information to consumers alongside brand websites. It is interesting to note that three quarters of consumers would use a brand-supported source (the label and/or the company's website) to look for the ingredients and nutrition information for a product.

2 Introduction

2.1 The regulatory context

Food Information to Consumers has been governed by regulation at EU level since 1979[1]. In 1987, the European 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. Alcoholic strength of a beverage containing more than 1.2% alcohol by volume had to be indicated on the label.

The most recent development was the adoption of the Food Information to Consumers regulation (Regulation (EU) 1169/2011) in 2011 by the European Parliament and the Council of the European Union that recalled existing rules on the listing of ingredients (applicable since 13 December 2014) and introduced new rules on providing the nutrition information to consumers (fully applicable from the 13 December 2016 onwards). All food and drink products, excluding alcoholic beverages of more than 1.2% abv, have to provide consumers with the list of ingredients by descending order of weight and the full nutrition declaration (energy values in kcal and kJ, fat, saturated fats, carbohydrates, sugars, proteins and salt in g) by 100ml/g as a reference. The information per portion may be shared in addition to the 100ml/g reference.

Alcoholic beverages of more than 1.2% abv are exempted from these two requirements, unless national regulation provides otherwise which is true for beer in at least four European countries. They do not have to provide the list of ingredients or the nutrition declaration to consumers. They can however provide this information on a voluntary basis in which case they need to follow the rules laid down in the Regulation (i.e. the list of ingredients in descending order of weight), with a specific scheme for the nutrition information:

- Either the energy value in kcal/kJ by 100ml (which may be completed by the information per portion);
- Or the full nutrition declaration by 100ml (which may be completed by the information per portion).

We understand the Commission is now working on a report they have to produce and that shall look at whether alcoholic beverages should in future be covered, in particular, by the requirement to provide the information on the energy value, and the reasons justifying possible exemptions taking into account the need to ensure coherence with other relevant Union policies. The Commission might accompany that report by a legislative proposal, if appropriate, determining the rules for a list of ingredients or a mandatory nutrition declaration for those products.

With regard to the information concerning ingredients and nutritional values, the European Union emphasised 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 but other means exist and have been taken into account, to a certain extent, by the Food Information to Consumers Regulation in several Recitals and articles.

In conclusion, alcoholic beverages of more than 1.2% alcohol by volume (but beer in some markets) remain exempt from any obligation to provide the list of ingredients and the nutrition declaration (on energy content and the amounts of fat, saturates, carbohydrate, sugars, protein and salt) which are required for all other food products.

[1] 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

2.2 This study

This study builds upon a previous consumer survey done in 2014 in 6 European countries and released in March 2015. That survey – which looked into consumers' knowledge of beer, wine and some spirits' ingredients and nutritional values, their call for receiving the same information for alcoholic beverages as for any other food and drink product and their use of and interest in off-label platforms for receiving this information – showed interesting results. The majority of respondents demonstrated a limited knowledge of the nutritional values and ingredients of alcoholic beverages (despite a relatively high knowledge of the most common ingredients of beer and wine). The majority of consumers agreed that the same ingredients and nutritional information should be provided for all food and drink products (69% and 74% of respondents respectively supported these views). The study indicated that off-label sources are already being used to a certain extent and that information provided off-label can extend the information that is available on-label. Interest in using these platforms to access ingredients and nutrition information on alcoholic beverages ranged from 36-53%, although the degree to which consumers trust and prefer different types of off-label sources varied considerably.

The Brewers of Europe requested a follow-up survey that would specifically examines consumers' call for receiving the same ingredients and nutrition information for all alcoholic beverages as currently provided on all other food and drink products, the interest in the ingredients information, the calorie information and the full nutrition information on alcoholic beverages as well as the different information sources that consumers would like to use to access this information. This was requested because Europe's brewers recently committed to progressively sharing this information with consumers and are doing that using several platforms, including the label and companies' websites. GfK Belgium conducted the follow-up online survey in nine different European Union countries in April 2016**.** The nine countries were selected as representative of the European Union and its different regions, ensuring a balanced geographical spread. These nine EU countries were Germany, Poland, Denmark, the Netherlands, Spain, the United Kingdom, Italy, France and Romania. In total, they account for approximately 78% of the total European population[2] and about a third of all EU Member States.

[2] Eurostat data, 2015.

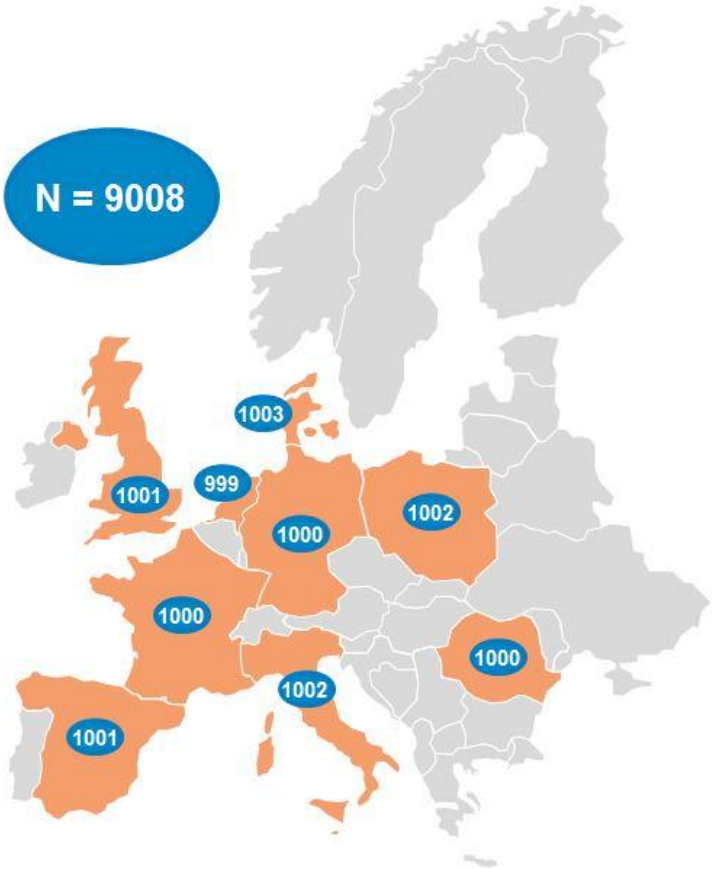
3 Approach

As mentioned above, an online survey in nine different European Union countries was conducted by GfK Belgium in April 2016**.** The widespread use of Internet across all EU countries means that online surveys are increasingly considered a robust representation of the general public. A random sampling approach was applied and in total, 9,008 respondents were surveyed. The number of respondents per country (Germany, Poland, Denmark, the Netherlands, Spain, the United Kingdom, Italy, France and Romania) is presented in Figure 1.

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 in the countries under study. The data was made representative by means of weighting on country (equal weights), age groups and gender. For this, Eurostat data were taken as a point of reference.

This report considers the weighted results of the survey questions, as well as reports on some detailed results per country and alcohol consumption. In Table 1, the sample size per profile variable is reported.[3]

Figure 1 Sample size per country under study



[3] The technical report on the operationalization of concepts used throughout the report can be found in the Annex of this report.

Table 1 Unweighted sample sizes in total and per country

	Total	DK	PL	ES	NL	DE	UK	FR	RO	IT
Sample (N)	**9008**	**1001**	**1001**	**1001**	**1002**	**1001**	**1001**	**1002**	**1000**	**1000**
Gender										
Male	4286	429	486	484	496	522	473	461	457	478
Female	4722	574	516	517	503	478	528	539	543	524
Age Groups										
18 – 25	1140	173	135	109	110	98	127	132	118	138
26 – 35	1925	181	251	237	198	201	224	207	217	209
36 – 45	2106	197	209	264	231	223	227	222	263	270
46 – 55	2105	240	208	234	247	270	231	231	189	255
56 – 65	1732	212	199	157	213	208	192	208	213	130
Education										
Low	1061	214	26	111	198	198	115	75	8	116
Medium	4377	526	501	431	643	497	513	418	279	569
High	3570	263	475	459	158	305	373	507	713	317
Family status										
Single	2879	392	229	305	285	342	401	315	252	358
In Partnership	2096	287	206	242	243	232	173	353	141	219
Married	4033	324	567	454	471	426	427	332	607	425
Employment										
Employed	6190	522	738	724	709	734	648	671	771	673
Unemployed	782	113	43	121	88	32	125	104	26	130
Other	2036	368	221	156	202	234	228	225	203	199
Income										
Low	1585	127	79	216	138	74	257	144	284	266
Average	5281	527	687	623	600	553	507	633	585	566
High	770	174	57	36	40	215	86	105	19	38
Children										
No	5137	734	514	509	590	657	630	520	503	480
Yes, younger than 12	2288	158	288	287	240	219	221	283	284	308
Yes, older than 12	1583	111	200	205	169	124	150	197	213	214
Alcohol consumption frequency										
Abstainers	518	47	16	35	94	53	98	102	35	38
Infrequent or rarely	2286	372	253	154	323	332	264	243	231	114
Occasional	4071	444	532	448	413	440	455	422	529	388
Regular	2133	138	200	364	171	176	184	234	206	460
Alcohol consumption amount										
Abstainers	829	101	25	62	94	165	138	137	50	57
Light drinkers	4414	326	376	626	508	451	397	537	538	655
Moderate drinkers	2326	315	286	232	252	247	292	222	256	215
Excessive drinkers	1440	259	314	81	147	139	174	106	147	73

4 Insights

4.1 Call for ingredients and nutritional information per 100ml on all food and drink products

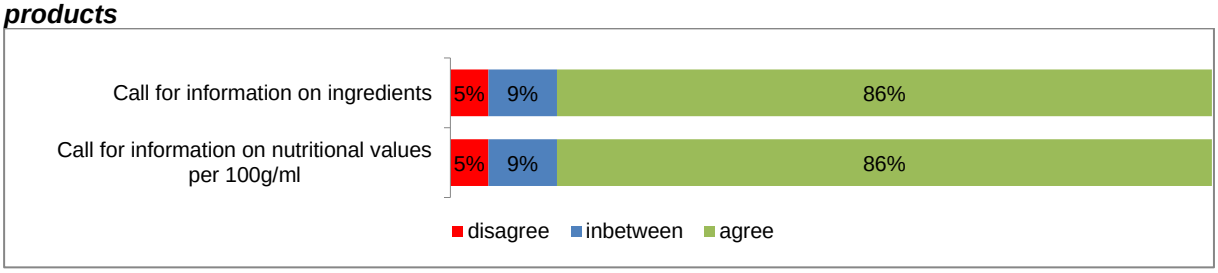
Consumers' call for ingredients and nutritional information on all food and drink products is measured via two questions that consider the extent to which European consumers agree with the statements that the nutrition declaration per 100 g/ml (energy value, fat, saturated fat, carbohydrates, sugars, proteins and salt) and ingredients information should be provided for all food and (alcoholic and non-alcoholic) drink products.

A majority of 86% of the European consumers agrees that ingredients information should be provided for all food and drink products (alcoholic and non-alcoholic beverages) and thus can be considered as calling for information on ingredients. Only 5% of the European consumers disagree that the ingredients information should be provided for all food and drink products (alcoholic and non-alcoholic beverages).

A majority of 86% of the European consumers agrees that nutritional information per 100 g/ml should be provided for all food and drink products (alcoholic and non-alcoholic beverages) and thus can be considered as calling for information on ingredients. Only 5% of the European consumers disagree that nutritional information should be provided for all food and drink products (alcoholic and non-alcoholic beverages).

Both calls are strongly linked to each other.

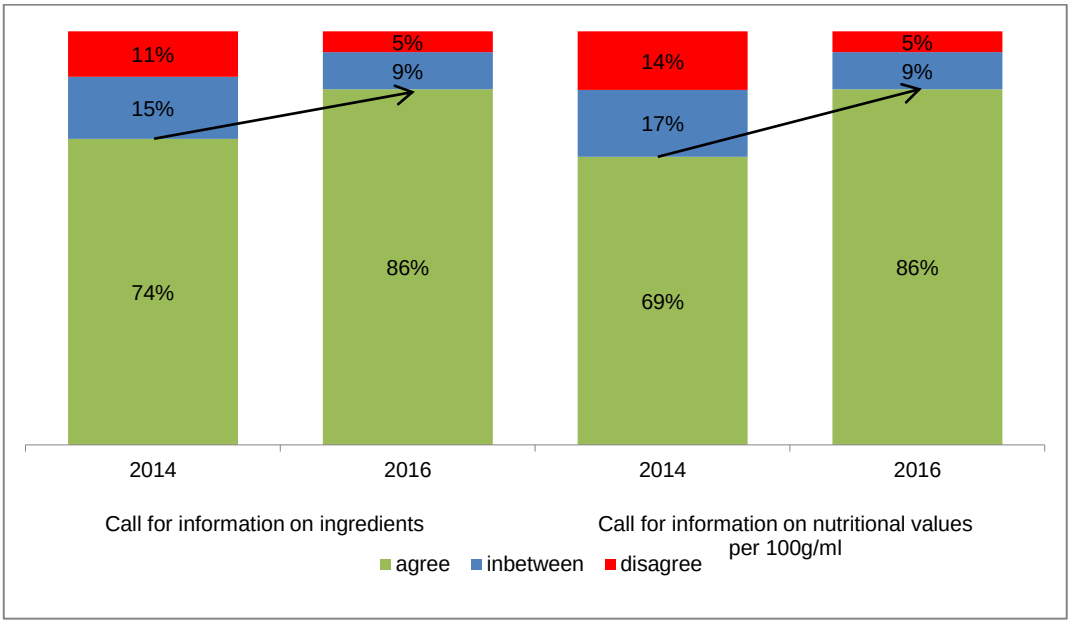
Figure 2 Call for ingredients and nutritional information per 100g/ml on all food and drink products



Note: Questions: Q1_1. All food and drink producers (including alcoholic and non-alcoholic) should provide the list of ingredients of their products according to the current rules. Q1_2. All food and drink producers should provide the nutrition declaration (energy value, fat, saturated fat, carbohydrates, sugars, proteins and salt) according to the current rules (per 100g/ml) 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 = 9.008.

The same questions about ingredients and nutritional information were asked in 2014. As in 2014, the vast majority of consumers called for receiving the same information for all food and drink products. In the survey of 2016, this view was even more pronounced, with more respondents indicating they agreed that this information should be provided. The comparison is presented in the following figure. The percentage that agreed increased with 16% when considering the call for information on ingredients. The percentage that agreed increased with 25% when considering the call for information on nutritional values per 100 g/ml. This is indicated by the trend arrow in the figure below.

Figure 3 Call for ingredients and nutritional information per 100g/ml on all food and drink products in 2014 and 2016



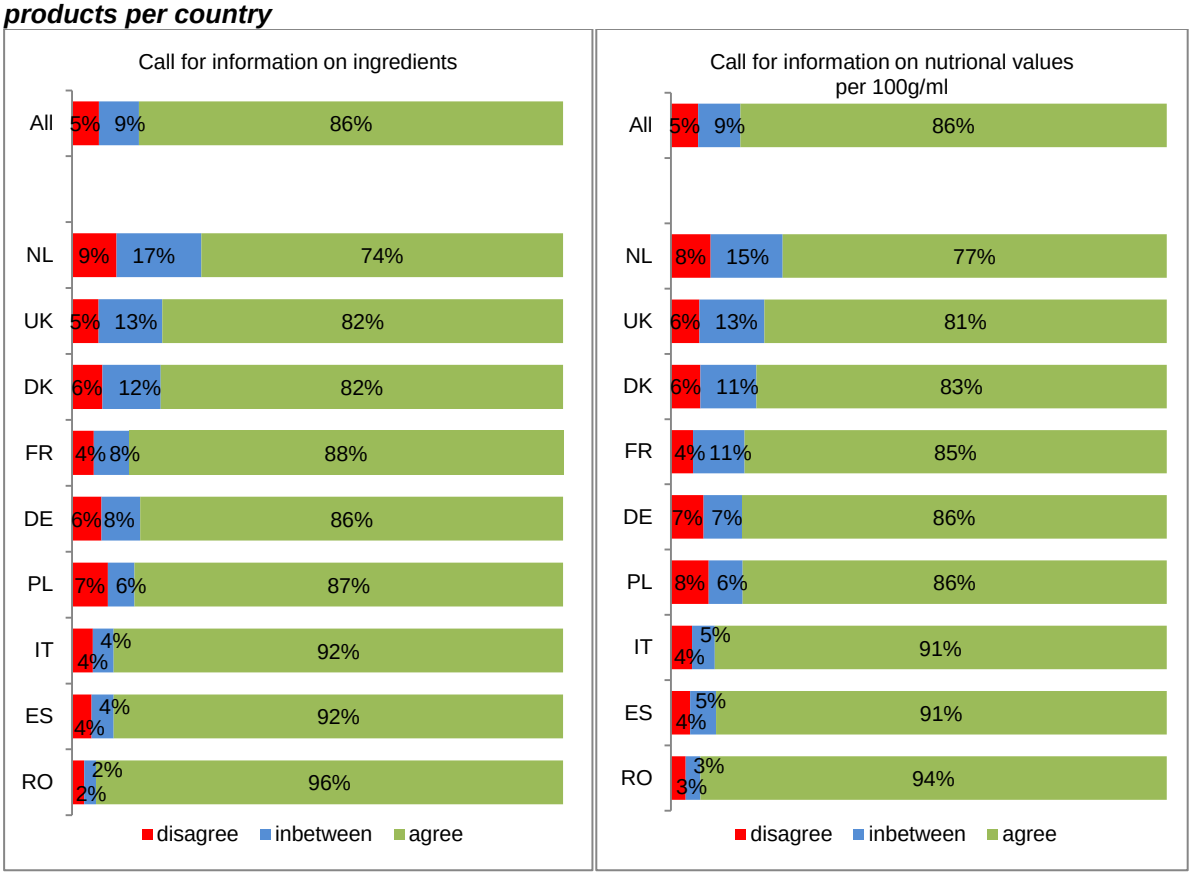
Note:
2014 Questions: 1. The same nutrition information (energy value, proteins, carbohydrates, sugars, fat, saturated fats, salt) should be provided for all food and drink products (alcoholic and non-alcoholic). 2. The list of ingredients should be provided for all food and drink products (alcoholic 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.

2016 Questions: Q1_1. All food and drink producers (including alcoholic and non-alcoholic) should provide the list of ingredients of their products according to the current rules. Q1_2. All food and drink producers should provide the nutrition declaration (energy value, fat, saturated fat, carbohydrates, sugars, proteins and salt) according to the current rules (per 100g/ml) 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 = 9.008.

In Figure 4, the country results of call for information on ingredients and nutritional values are presented. In most countries, the call for information is high and a majority of consumers agree that information should be made available on ingredients and nutritional values for all food and drink products. However, this majority varies from a majority of 74% the consumers in the Netherlands to a majority of 96% of the consumers in Romania when considering call for ingredients information. With regard to the call for nutritional information, the majority ranges from a majority of 77% of the consumers in the Netherlands to a majority of 94% of the consumers in Romania.

In most countries, the call for ingredients information is slightly higher than the call for information on nutritional values. Only in the Netherlands, the call for nutritional information is slightly higher than the call for information on ingredients.

Figure 4 Call for ingredients and nutrition information (per 100g/ml) on all food and drink products per country



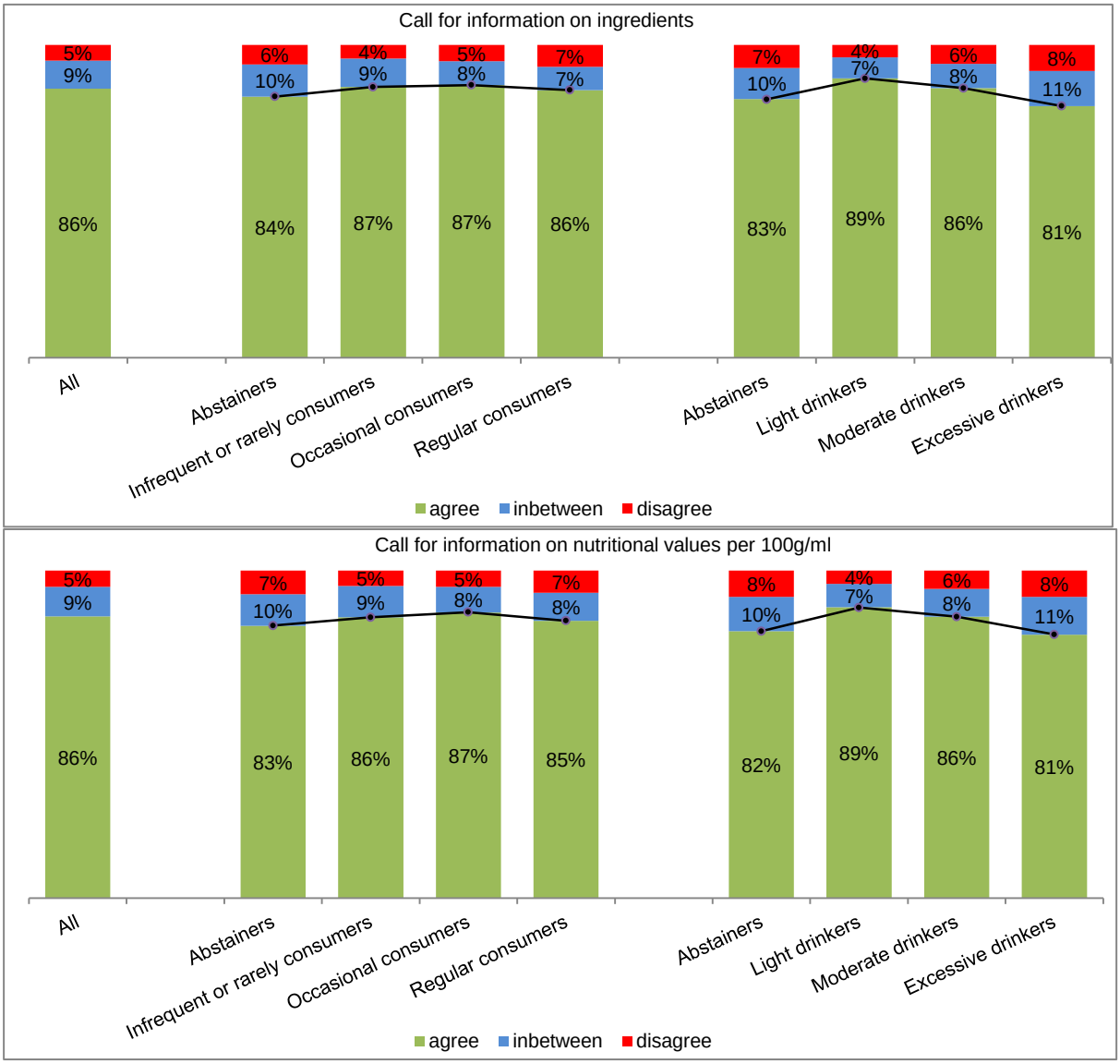
Note: Questions: Q1_1. All food and drink producers (including alcoholic and non-alcoholic) should provide the list of ingredients of their products according to the current rules. Q1_2. All food and drink producers should provide the nutrition declaration (energy value, fat, saturated fat, carbohydrates, sugars, proteins and salt) according to the current rules (per 100g/ml) 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 = 9.008.

The consumption of alcoholic beverages[4] and its relationship to the call for having information regarding ingredients and nutritional values provided is further researched in detail.

Consumers who never consume alcoholic beverages (abstainers[5]) have a lower call for information on ingredients and nutritional values on all food and drink products. Consumers who do not drink alcohol frequently (infrequently or occasional) have a somewhat higher call for information on ingredients and nutritional values than consumers who drink more regularly, though the difference is negligible. The amount of glasses of alcoholic beverages one drinks on a single occasion is more related to the call for information on ingredients and nutritional values. Light drinkers (who consume 1 or 2 glasses of alcohol per occasion) have a higher call for information on ingredients and nutritional values than moderate drinkers (who consume 3 or 4 glasses of alcohol per occasion) and excessive drinkers (who consume 5 or more glasses of alcohol per occasion).

[4] The operationalization of alcohol consumption is discussed in the Annex of this report.
[5] The proportion of abstainers differs when considering alcohol consumption as the amount of glasses of alcohol one consumes per occasion and when considering alcohol consumption as the frequency of of consumption). This is caused by the answer categories and the operationalization of the two composed variables that is further explained in the Annex of this report.

Figure 5 Call for ingredients and nutrition information (per 100g/ml) on all food and drink products per alcohol consumption (amount of glasses of alcohol per occasion and frequency of consumption)



Note: Questions: Q1_1. All food and drink producers (including alcoholic and non-alcoholic) should provide the list of ingredients of their products according to the current rules. Q1_2. All food and drink producers should provide the nutrition declaration (energy value, fat, saturated fat, carbohydrates, sugars, proteins and salt) according to the current rules (per 100g/ml) 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. Alcohol consumption (amount of glasses of alcohol per occasion and frequency of consumption) were two composed variables, for which the operationalization can be found in the Annex of this report. N = 9.008.

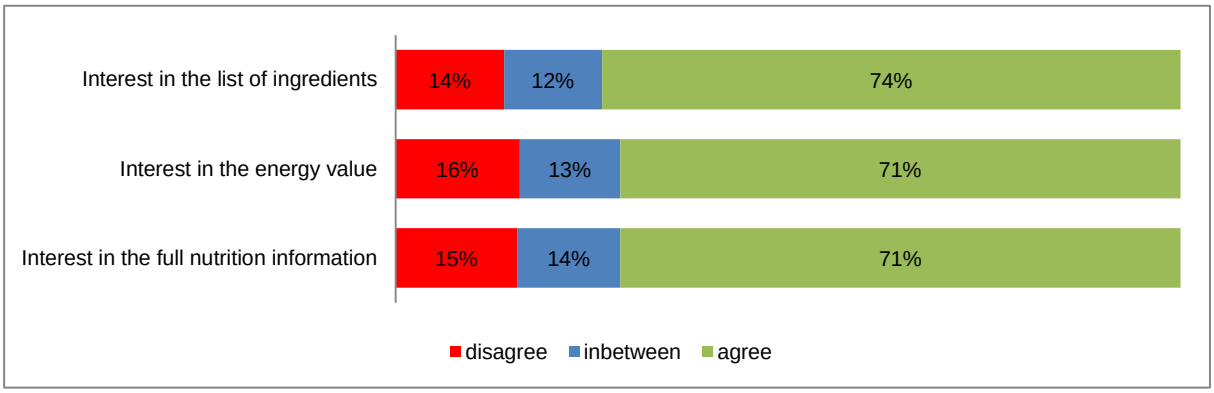
4.2 Interest in ingredients and nutrition information for alcoholic beverages

Additionally, consumers are asked about their interest in three types of information concerning alcoholic beverages in particular:

- List of ingredients
- Information on energy value (calorie content)
- Full nutrition information (energy value, fat, saturated fat, carbohydrates, sugars, proteins and salt) [6]

In Figure 6, the results are presented for all three types of information. Interest is high for all three types of information, though somewhat higher for the list of ingredients than for the energy value and the full nutrition information.

Figure 6 Interest in the list of ingredients, the energy value, and the full nutrition information for alcoholic beverages

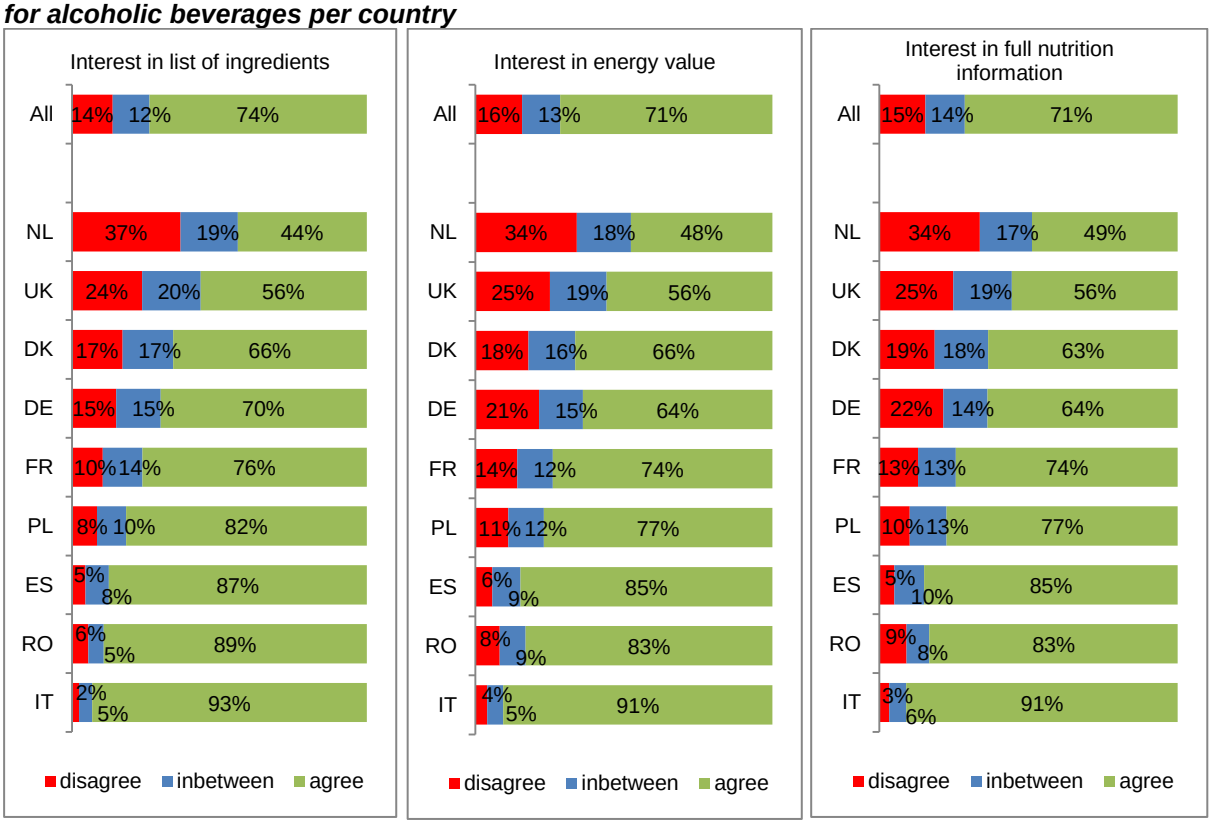


Note: Question: Q2 How interested are you to know the list of ingredients in the different alcoholic beverages that you buy? Q3 How interested are you to know the energy value (calorie content) in the different alcoholic beverages that you buy? Q4 How interested are you to know the full nutrition information (energy value, fat, saturated fat, carbohydrates, sugars, proteins and salt) in the different alcoholic beverages that you buy? Answer categories: scale from 1. I am not interested at all to 7. I am very interested. Categories agree: score 5 to 7, in-between: score 4, disagree: score 1 to 3. N = 9.008.

In Figure 7, the country results of interest in information on the list of ingredients, information on energy value and the full nutrition information for alcoholic beverages are presented. There is a strong variation between countries regarding the interest in these three types of information: a small proportion of 44% of the consumers in the Netherlands compared to a vast majority of 80% of the consumers in Italy indicate that they are strongly interested in knowing the list of ingredients for alcoholic beverages. Likewise, results range from 48% in the Netherlands to 91% in Italy when considering the proportion of consumers with a strong interest in the energy value; and from 49% in the Netherlands to 91% in Italy when considering the proportion of consumers with a strong interest in the full nutrition information. In countries such as Spain, Romania and Italy, an overall majority of consumers (i.e. at least 4 in 5 consumers) is very interested to know all three types of information regarding alcoholic beverages.

In most countries, the proportion of consumers that are very interested to know the list of ingredients is similar to the proportion of consumers that are very interested to know the energy value and the full nutrition information. Only in the Netherlands, Germany, Poland and Romania, there is variation in interest considering the types of information. In the Netherlands, the proportion of consumers with a high interest in information is less outspoken when considering the ingredients list (44%), than when considering the energy value (48%) or the full nutrition information (49%). In Germany, Poland, and Romania, the proportion of consumers with a high interest in information is more outspoken when considering the ingredients list (respectively 70%, 82% and 89%), than when considering the energy value (respectively 64%, 77% and 83%) or the full nutrition information (respectively 64%, 77% and 83%).

Figure 7 Interest in the list of ingredients, the energy value, and the full nutrition information for alcoholic beverages per country



Note: Question: Q2 How interested are you to know the list of ingredients in the different alcoholic beverages that you buy? Q3 How interested are you to know the energy value (calorie content) in the different alcoholic beverages that you buy? Q4 How interested are you to know the full nutrition information (energy value, fat, saturated fat, carbohydrates, sugars, proteins and

salt) in the different alcoholic beverages that you buy? Answer categories: scale from 1. I am not interested at all to 7. I am very interested. Categories agree: score 5 to 7, in-between: score 4, disagree: score 1 to 3. N = 9.008.

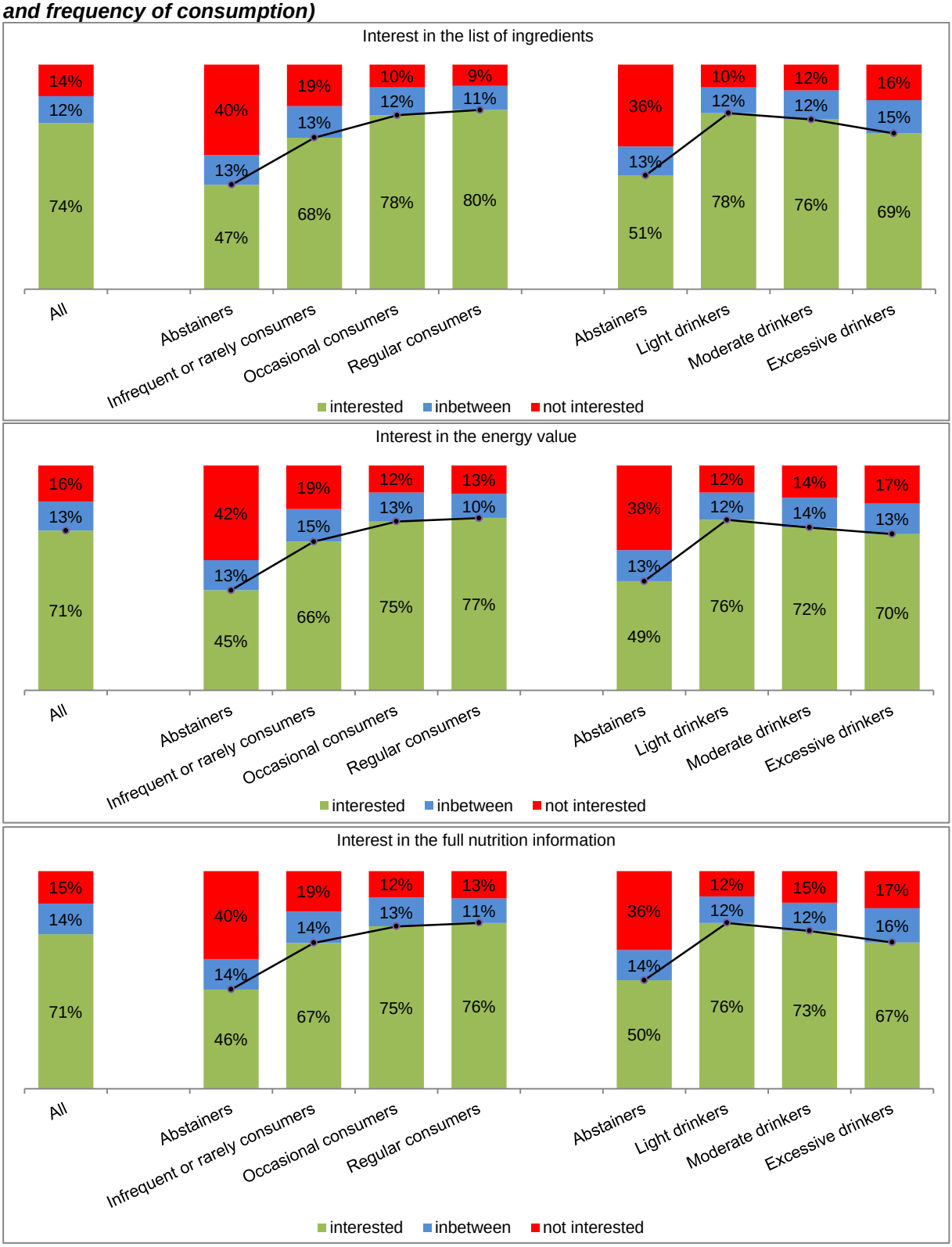
The consumption of alcoholic beverages and its relationship to the interest to know the three types of information for alcoholic beverages is also researched in detail in the following figures.

Overall, abstainers seem to be the least interested to know the three types of information for alcoholic beverages. When considering consumers that do consume alcohol, the following relationships appear. The frequency of consuming alcoholic beverages is positively related to the interest to know the three types of information for alcoholic beverages, while the amount of glasses consumed per occasion is negatively related to be interested to know the three types of information for alcoholic beverages.

The proportion of consumers who are interested to know the three types of information diminishes when consumers more frequently consume alcohol.

The amount of glasses of alcoholic beverages one drinks on a single occasion is negatively related to the interest to know the three types of information for alcoholic beverages. Light drinkers (who consume 1 or 2 glasses of alcohol per occasion) have a higher interest in information on ingredients and nutritional values than moderate drinkers (who consume 3 or 4 glasses of alcohol per occasion) and excessive drinkers (who consume 5 or more glasses of alcohol per occasion).

Figure 8 Interest in the list of ingredients, the energy value, and the full nutrition information for alcoholic beverages per alcohol consumption (amount of glasses of alcohol per occasion and frequency of consumption)



Note: Questions: Q2 How interested are you to know the list of ingredients in the different alcoholic beverages that you buy? Q3 How interested are you to know the energy value (calorie content) in the different alcoholic beverages that you buy? Q4 How interested are you to know the full nutrition information (energy value, fat, saturated fat, carbohydrates, sugars, proteins and salt) in the different alcoholic beverages that you buy? Answer categories: scale from 1. I am not interested at all to 7. I am very interested. Categories agree: score 5 to 7, in-between: score 4, disagree: score 1 to 3. N = 9.008.

The call for having the same information on ingredients for all food and drink products is strongly and positively linked with the call for having the same information on nutritional values for all food and drink products. Also interest in different information types is strongly and positively linked to each other. Furthermore, the call of consumers to have identical information on ingredients and nutrition information for food and drinks is also positively related to the interest to know ingredients and nutrition information of alcoholic beverages.

4.3 Information sources to access ingredients and nutrition information for food and drink products

In the previous section, we discussed consumers' call for ingredients and nutrition information for food and drink products, and interest in these types of information for alcoholic beverages in particular. In this section, we investigate the types of information sources that consumers would use to acquire this kind of information Various sources of information, both traditional offline as digital online information sources, are considered.

Traditional offline sources[7] include:

- Brand labels: the label that is attached to the food or drink product;
- In-store or in-bar communication: all types of information sources that are found in public places where people consume food or drink products, such as posters or on-shelf communication;
- Offline advertising: all types of advertising, for instance on TV, in magazines or outdoors.

Digital online sources include:

- Smartphone or tablet applications;
- Brand or company websites or owned webpages;
- Public health authorities' websites;
- More general health and nutrition websites.

Another classification of these information sources is the grouping of brand labels and brand or company websites or owned webpages into the group of "brand-supported information source" that cover the information sources that are controlled and edited by the company/brand.

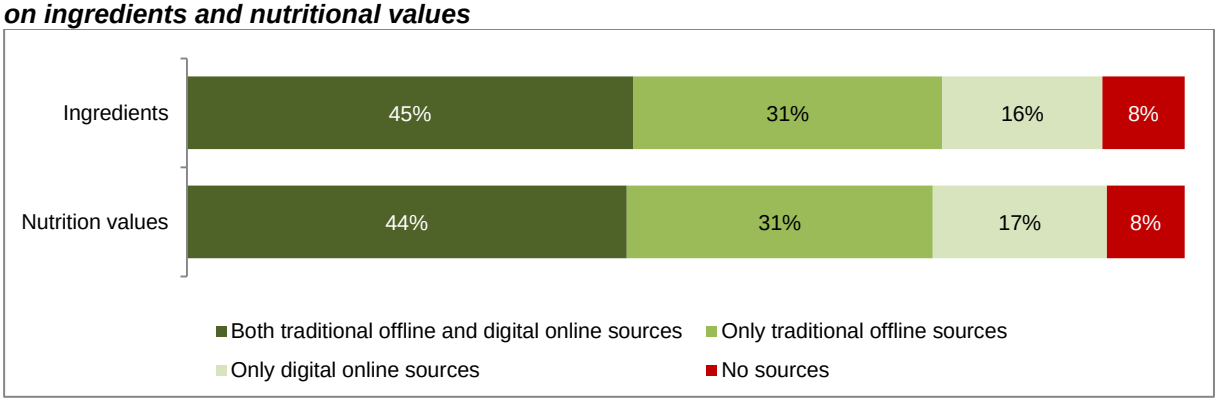
In the following figures, the results for using information sources to access information on ingredients and nutritional values are presented.

[7] The operationalization of these grouping variables are discussed in the Annex of this report

First of all, one can consider the proportion of consumers that considers traditional offline sources, digital online sources, or both kind of sources to access information on ingredients and nutritional values.

As presented in the figure below, 45% of the consumers would use both traditional offline as well as digital online information sources to access information on ingredients. 31% of the consumers would only use traditional offline sources and 16% of the consumers would only use digital online sources. When it comes to accessing information regarding nutritional values, the data are very similar. 44% of the consumers would use a mix of both traditional offline and digital online sources to access this kind of information, whilst 31% would only use traditional offline sources and 17% would only use digital online sources.

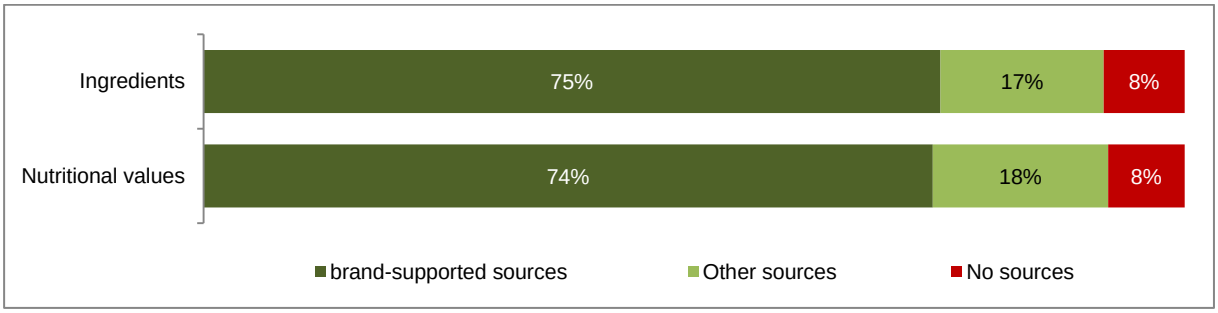
Figure 9 Use of traditional offline and digital online information sources to access information on ingredients and nutritional values



Note: Questions: Q5. Which of the following sources would you use to access ingredients information for food and drink products? Q6. Which of the following sources would you use to access nutrition information for food and drink products? N=9008.

Subsequently, we can take into account the classification of brand-supported information sources. Respectively 75% and 74% of all consumers would use brand-supported information sources, such as brand labels or brand websites, to access information on ingredients and nutritional values. Other information sources are less important when one would access information on ingredients or nutritional values.

Figure 10 Use of brand-supported information sources to access information on ingredients and nutritional values



Note: Questions: Q5. Which of the following sources would you use to access ingredients information for food and drink products? Q6. Which of the following sources would you use to access nutrition information for food and drink products? N=9008.

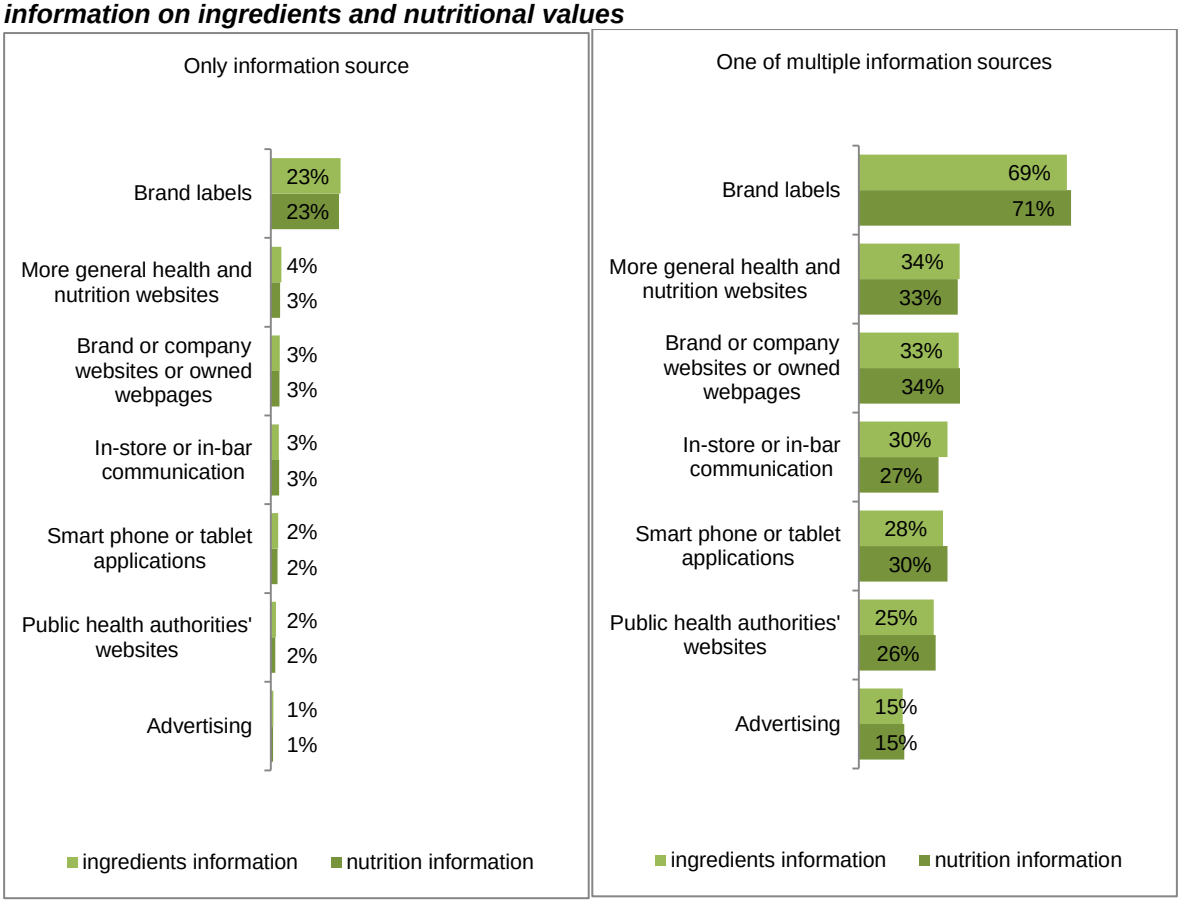
Next, one can consider the results per type of information source. We do not consider the 8% of the consumers that are not interested and do not indicate any information source.

Brand labels appear to be the information source that consumers would use the most often to access information on ingredients and nutrition information for food and drink products. When looking at the label used as one of the sources of information used, 69% and 71% of consumers would use the label as a source to access the information. When looking at the label used as the only source of information, only 22% and 21% of consumers would exclusively use the label to access the information.

Considering this latter result, this means that 7 out of 10 consumers consider other information sources next to the label to access information on ingredients and nutritional values.

Other information sources than brand labels are only considered by smaller proportions of consumers. More traditional offline information sources such as in-store or in-bar communication and advertising are sources that are considered by a minority of consumers. Amongst digital online information sources, the most popular to access information on ingredients and nutritional values are websites. Smart phone or tablet applications are less likely to be used to access ingredients and nutrition information.

Figure 11 Use of information sources (only or one of multiple information sources) to access information on ingredients and nutritional values



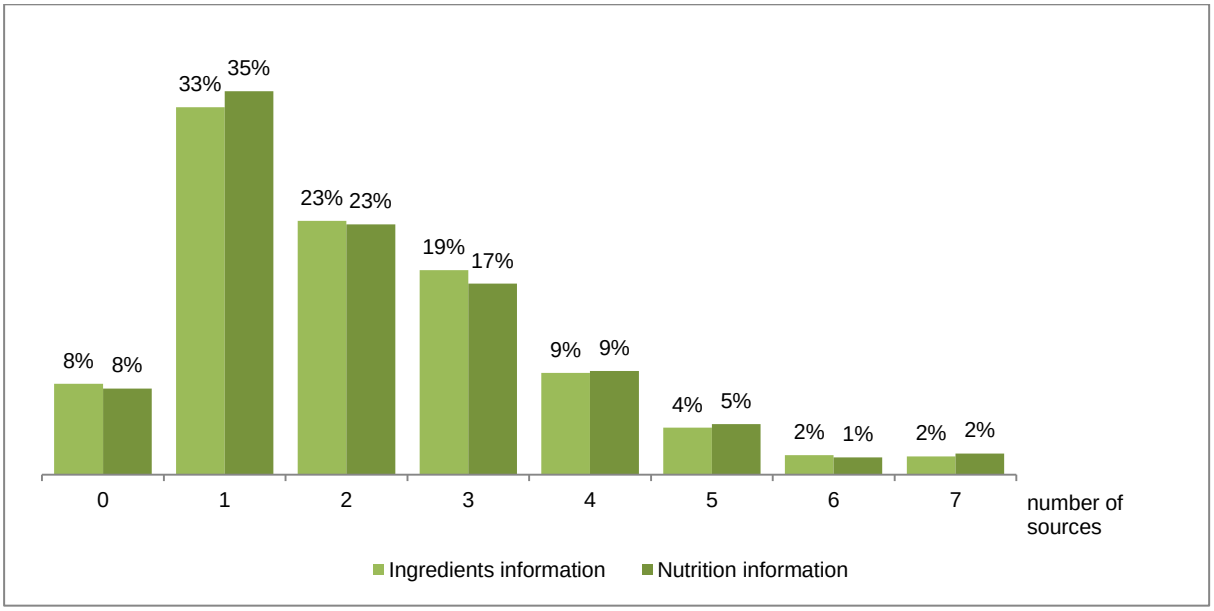
Note: Questions: Q5. Which of the following sources would you use to access ingredients information for food and drink products? Q6. Which of the following sources would you use to access nutrition information for food and drink products? N=9008.

Subsequently, one can consider the number of different information sources that consumers use to access information on ingredients and nutrition. This is presented in the following figure.

A third of all consumers would regard only one source of information to access ingredients and nutrition information; a quarter of all consumers would regard two sources of information to access ingredients and nutrition information; 4 in 5 consumers would regard three or more sources of information to access ingredients and nutrition information.

Overall, 57% and 57% would consider more than one source of information to access information on respectively ingredients and nutritional values.

Figure 12 Number of information sources used to access information on ingredients and nutritional values



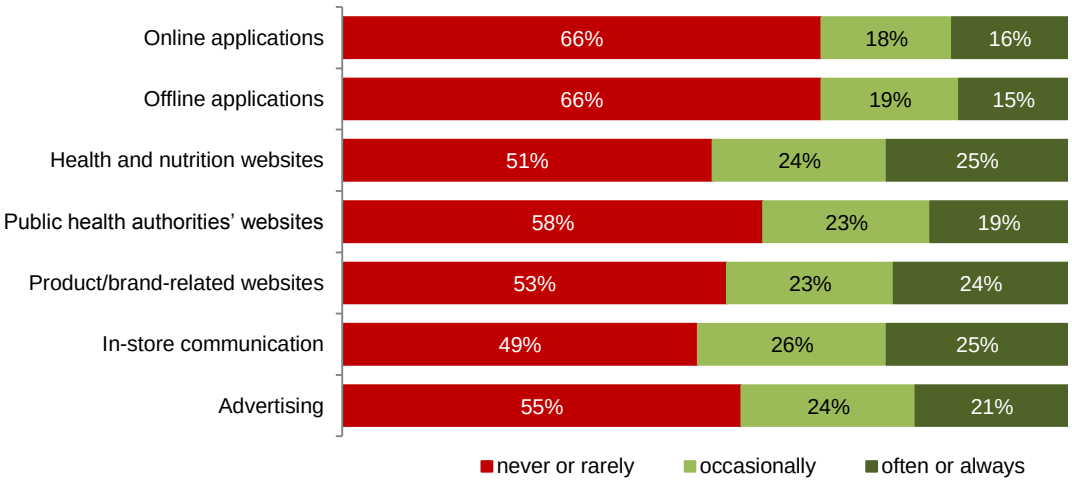
Note: Questions: Q5. Which of the following sources would you use to access ingredients information for food and drink products? Q6. Which of the following sources would you use to access nutrition information for food and drink products? N=9008.

When only one source of information was indicated to access information on ingredients and nutritional values (in 35% and 33% of the cases), this was most likely to be a brand label. When two different sources of information were indicated to access information on ingredients and nutrition (23% in both cases), the label was also more likely to be mentioned as one of those two sources than any other source of information. Other information sources that were often considered as well were in-store or in-bar communication, and brand or company websites or owned webpages. When three different sources of information were indicated to access information on ingredients and nutritional values (in 17% and 19% of the cases), the label was more likely to be mentioned as one of those three sources than any other source of information. Other sources that were often considered as well were in-store or in-bar communication, more general health and nutrition websites, and brand or company websites or owned webpages.

The 2014 survey measured the use of different information sources for alcoholic drinks specifically. When compared to the results for all food and drink products, very similar patterns emerge. In-store communication, health and nutrition websites, and product or brand-related websites top the list of consulted sources for alcoholic drinks as well as all foods and drinks. The present study in 2016 added the importance of labels compared to other sources of information. Overall, it appears that the use of sources for alcoholic drinks is very similar to that of all food and drink products.

Furthermore, the results of 2016 seem to indicate that the role of digital online information sources is growing. A majority of 3 out of 5 consumers would in 2016 access information via these digital online sources. Contrary, a majority of the consumers (ranging from 53% to 66%) in 2014 indicated that they would never or only rarely use these digital online sources to access information. This is illustrated in the figure below.

Figure 13 Use of off-label information sources to access information on nutritional values and ingredients of alcoholic beverages (2014 data)



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.

5 Conclusion

This study looked at consumers' call for and interest in ingredients and nutrition information, as well as the sources they would use to access this information. Several EU policies are now in place to govern the provision of food information to consumers. Currently, alcoholic beverages of more than 1.2% alcohol by volume remain exempt from any EU obligation to provide the list of ingredients and the nutrition declarations per 100ml of energy content and the amounts of fat, saturates, carbohydrate, sugars, protein and salt, as is currently required for all other food and drink products.

This report considered insights on consumers' call for the ingredients and nutrition information on alcoholic beverages, their interest in this information and the various information sources that can be used to access them.

The consumers' insight survey was conducted in nine EU countries that were representative of 80% of the EU population, also ensuring a balanced geographical spread. 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 variations exist.

Three research questions were posed and can be answered as follows.

What should be the information requirements regarding ingredients and nutrition information for alcoholic beverages?

There is a general and growing call for consumers to receive the list of ingredients and the nutritional values per 100ml for alcoholic beverages, as is currently required for other food and drink products. There is some country variation to take into consideration, though it is in line with the previous results of 2014. It seems that national contexts and histories slightly interact with the call for information. For example, in the Netherlands the list of ingredients and the nutrition declaration per 100ml for beer is shared with consumers. However, these national contexts are not looked into detail, as this report does not include country chapters. Light and moderate drinkers are most interested in receiving the same information on ingredients and nutritional values for all food and drink products whilst excessive drinkers show a lower interest in this information.

What is the interest in ingredients and nutrition information on alcoholic beverages in particular?

More than 7 out of 10 consumers are interested in accessing ingredients and nutrition information for alcoholic beverages, with little variation in the interest in different types of information - list of ingredients, energy value, and information on all seven nutrition values (energy, fat, saturated fats, carbohydrates, sugar, proteins and salt).

With regard to the interest in the different types of information, there is a great deal of country variation. This seems to be linked with national contexts and histories, such as:

- In Spain and Italy, the culture of drinking alcoholic beverages in accompaniment to a meal may explain the high interest Spanish and Italian consumers show in these different kinds of information.
- In Germany, the 'Reinheitsgebot' or 'German Beer Purity Law' is an existing regulation concerning the production of beer which stipulates the only ingredients that can be used in the

production of beer. As a result, German consumers may be less interested in these types of information, as they already know them.

- In Denmark and the Netherlands, self-regulation lays down that the information concerning beer nutritional values and beer ingredients should be shared with the consumers.

With regard to alcohol consumption, there seems to be a clear pattern between interest in information and frequency of alcohol consumption, as the more often consumers drink alcoholic beverages, the more often they are interested in the three different types of information (ingredients, energy value, and full nutrition information). However, when considering the amount of alcoholic drinks one consumes per occasion, light and moderate drinkers are most interested in information on the list of ingredients, energy value, and nutrition information.

Which information sources would consumers use to access information on ingredients and nutrition information?

Labels remain the most popular source for information, but are often not the sole source of information. Both more traditional offline as well as digital online sources would be accessed to gather information on ingredients and nutritional values. Compared to 2014, online sources would be increasingly used to access information. Furthermore, more and more different platforms are used, with the proportion of consumers only considering a single source of information limited to just a third of the consumers, while more than half of consumers would access the ingredients and nutrition information via two or more sources of information.

6 Annex. Operationalization of variables

6.1 Operationalization of call for and interest in ingredients and nutrition information

The questions regarding call for and interest in ingredients and nutrition information (Q1, Q2, Q3, and Q4) were operationalized as follows:

1. Question 1:
    a. Disagree was the grouping of the answer categories '1. I strongly disagree', '2.' and '3.'
    b. In-between was answer category '4.'
    c. Agree was the grouping of the answer categories '5.', '6.' and '7. I strongly agree'
2. Question 2, 3 and 4:
    a. Not interested was the grouping of the answer categories '1. I am not interested at all', '2.' and '3.'
    b. In-between was answer category '4.'
    c. Interested was the grouping of the answer categories '5.', '6.' and '7. I am very interested'

Both calls were strongly linked to each other. The Pearson correlation coefficient of 0.821 was significant at the 0.01 level (2-tailed), which means that the answers on the statement regarding ingredients information were positively and strongly related to the answers on the statement regarding nutrition information.

Interest in information types was strongly linked to each other. The Pearson correlation coefficients were the following:

- Correlation coefficient of 0.751, significant at the 0.01 level (2-tailed) between interest in list of ingredients and interest in information on energy value. This means that the answers on the interest statement regarding the ingredients list were positively and strongly related to the answers on the interest statement regarding energy content.
- Correlation coefficient of 0.771, significant at the 0.01 level (2-tailed) between interest in list of ingredients and interest in the full nutrition information. This means that the answers on the interest statement regarding the ingredients list were positively and strongly related to the answers on the interest statement regarding the full nutrition information.
- Correlation coefficient of 0.858, significant at the 0.01 level (2-tailed) between interest in information on energy value and interest in the full nutrition information. This means that the answers on the interest statement regarding information on energy value were positively and strongly related to the answers on the interest statement regarding the full nutrition information.

The call of consumers to have identical information on ingredients and nutrition information for food and drinks is related to the interest to know ingredients and nutrition information of alcoholic beverages. Investigating the Pearson correlations coefficients between the 7-point answer questions, it was apparent that all relationships were positive and significant at the 0.01 level (2-tailed):

- Correlation coefficient of 0.414, significant at the 0.01 level (2-tailed) between interest in the list of ingredients and call for information on ingredients on food and drinks
- Correlation coefficient of 0.398, significant at the 0.01 level (2-tailed) between interest in the list of ingredients and call for information on nutritional values on food and drinks
- Correlation coefficient of 0.333, significant at the 0.01 level (2-tailed) between interest in the energy value and call for information on ingredients on food and drinks
- Correlation coefficient of 0.411, significant at the 0.01 level (2-tailed) between interest in the energy value and call for information on nutritional values on food and drinks
- Correlation coefficient of 0.345, significant at the 0.01 level (2-tailed) between interest in the full nutrition information and call for information on ingredients on food and drinks
- Correlation coefficient of 0.414, significant at the 0.01 level (2-tailed) between interest in the full nutrition information and call for information on nutritional values on food and drinks

Relationships are all moderate in strength, positive and significant. The call of consumers to have identical information on ingredients is somewhat more linked to the interest in the list of ingredients for alcoholic beverages than to the interest in the energy value and the full nutrition information for alcoholic beverages. The call of consumers to have identical information on nutritional values is somewhat more linked to the interest in the energy value and the full nutrition information for alcoholic beverages than to the interest in the list of ingredients for alcoholic beverages.

6.2 Operationalization of alcohol consumption

Alcoholic consumption (amount of glasses of alcohol consumed on a single occasion) was operationalized as follows:

1. Abstainers:
    a. People indicating to never drink (code 6 in question Q7)
    b. People indicating to never drink (code 1 in Q9 taking into account beer, wine, and spirits)
2. Light drinkers
    a. People indicating to drink 1 or 2 glasses of alcohol (code 2 in Q9 taking into account beer, wine, and spirits)
3. Moderate drinkers
    a. People indicating to drink 3 or 4 glasses of alcohol (code 3 in Q9 taking into account beer, wine, and spirits)
4. Excessive drinkers
    a. People indicating to drink 5 or 6 glasses of alcohol (code 4 in Q9 taking into account beer, wine, and spirits)
    b. People indicating to drink 7 or 8 glasses of alcohol (code 5 in Q9 taking into account beer, wine, and spirits)
    c. People indicating to drink 9 or 10 glasses of alcohol (code 6 in Q9 taking into account beer, wine, and spirits)
    d. People indicating to drink more than 10 glasses of alcohol (code 7 in Q9 taking into account beer, wine, and spirits)

Alcoholic consumption (frequency of drinking alcohol) was operationalized as follows:

1. Never:
    a. People indicating to never drink (code 6 in Q7)
2. Infrequent or rarely consumers
    a. People indicating to drink once a month (code 5 in Q8 taking into account beer, wine, and spirits)
    b. People indicating to drink once every 2-3 months to once every 4-6 months (code 6 in Q8 taking into account beer, wine, and spirits)
    c. People indicating to drink less (including once a year…) (code 7 in Q8 taking into account beer, wine, and spirits)
3. Occasional consumers
    a. People indicating to drink once a week (code 3 in Q8 taking into account beer, wine, and spirits)
    b. People indicating to drink every two weeks (code 4 in Q8 taking into account beer, wine, and spirits)
4. Regular consumers
    a. People indicating to drink every day (code 1 in Q8 taking into account beer, wine, and spirits)
    b. People indicating to drink almost every day (code 2 in Q8 taking into account beer, wine, and spirits)

6.3 Operationalization of education

Education (question Z2) was operationalized as follows:

2. Lowly educated was the grouping of the following answer categories:
    a. No education completed (ISCED 0)
    b. Primary education (ISCED 1)
    c. Lower secondary education (ISCED 2)
3. Average educated was the grouping of the following answer categories:
    a. Upper secondary education (ISCED 3)
    b. Post-secondary including pre-vocational or vocational education but not tertiary (ISCED 4)
4. Highly educated was the grouping of the following answer categories:
    a. Tertiary education – first level (ISCED 5)
    b. Tertiary education – advanced level (ISCED 6)

6.4 Operationalization of employment

Employment (question Z3) was operationalized as follows:

1. Employed was the grouping of the following answer categories
    a. Self-employed
    b. Manager
    c. Other white collar
    d. Blue collar
2. Unemployed was the grouping of the following answer categories
    a. Unemployed
3. Other was the grouping of the following answer categories
    a. Students
    b. House-person
    c. Retired

6.5 Operationalization of income

Income (question Z7) was operationalized differently per country.

Income was operationalized in Denmark as follows:

1. Low income was the grouping of the following answer categories:
    a. Less than 2200 DKK a month
    b. Between 2200 DKK and 5599 DKK a month
2. Average income was the grouping of the following answer categories:
    a. Between 6000 DKK and 11999 DKK a month
    b. Between 12000 DKK and 22000 DKK a month
3. High income was the grouping of the following answer categories:
    a. More than 22000 DKK a month

Income was operationalized in Germany as follows:

1. Low income was the grouping of the following answer categories:
    a. Less than 350€ a month
    b. Between 350€ and 899€ a month
2. Average income was the grouping of the following answer categories:
    a. Between 900€ and 1.949€ a month
    b. Between 1.950€ and 3.600€ a month
3. High income was the grouping of the following answer categories:
    a. More than 3.600€ a month

Income was operationalized in the United Kingdom as follows:

1. Low income was the grouping of the following answer categories:
    a. Less than £300 a month
    b. Between £300 and £749 a month
2. Average income was the grouping of the following answer categories:
    a. Between £750 and £1,599 a month
    b. Between £1,600 and £3,000 a month
3. High income was the grouping of the following answer categories:
    a. More than £3,000 a month

Income was operationalized in Spain as follows:

1. Low income was the grouping of the following answer categories:
    a. Less than 350€ a month
    b. Between 350€ and 899€ a month
2. Average income was the grouping of the following answer categories:
    a. Between 900€ and 1.949€ a month
3. High income was the grouping of the following answer categories:
    a. Between 1.950€ and 3.600€ a month
    b. More than 3.600€ a month

Income was operationalized in France as follows:

1. Low income was the grouping of the following answer categories:
    a. Less than 350€ a month
    b. Between 350€ and 899€ a month
2. Average income was the grouping of the following answer categories:
    a. Between 900€ and 1.949€ a month
3. High income was the grouping of the following answer categories:
    a. Between 1.950€ and 3.600€ a month
    b. More than 3.600€ a month

Income was operationalized in Italy as follows:

1. Low income was the grouping of the following answer categories:
    a. Less than 350€ a month
    b. Between 350€ and 899€ a month
2. Average income was the grouping of the following answer categories:
    a. Between 900€ and 1.949€ a month
3. High income was the grouping of the following answer categories:
    a. Between 1.950€ and 3.600€ a month
    b. More than 3.600€ a month

Income was operationalized in the Netherlands as follows:

1. Low income was the grouping of the following answer categories:
    a. Less than 350€ a month
    b. Between 350€ and 899€ a month
2. Average income was the grouping of the following answer categories:
    a. Between 900€ and 1.949€ a month
    b. Between 1.950€ and 3.600€ a month
3. High income was the grouping of the following answer categories:
    a. More than 3.600€ a month

Income was operationalized in Poland as follows:

1. Low income was the grouping of the following answer categories:
    a. Less than 1200 zł a month
2. Average income was the grouping of the following answer categories:
    a. Between 1200 zł and 3099 zł a month
    b. Between 3100 zł and 6699 zł a month
3. High income was the grouping of the following answer categories:
    a. Between 6700 zł and 13000 zł a month
    b. More than 13000 zł a month

Income was operationalized in Romania as follows:

1. Low income was the grouping of the following answer categories:
    a. Less than 1560 RON a month
2. Average income was the grouping of the following answer categories:
    a. Between 1560 RON and 4019 RON a month
    b. Between 4020 RON and 8699 RON a month
3. High income was the grouping of the following answer categories:
    a. Between 8700 RON and 16080 RON a month
    b. More than 16080 RON a month