

CSR Performance Beer Industry | 2013

IN A FAST-CHANGING WORLD, CONTEXT IS EVERYTHING.



evidence and ideas. applied

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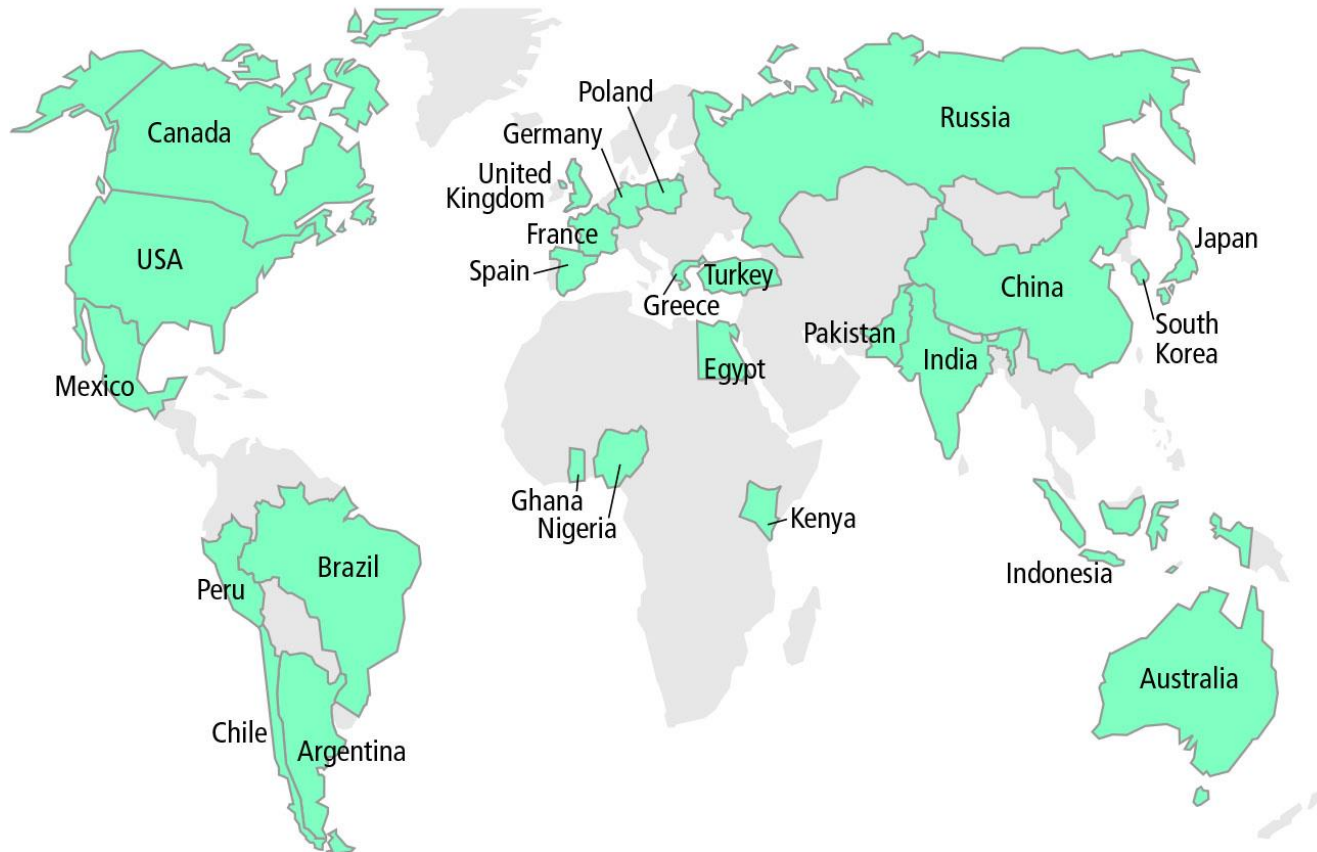
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Methodology

Participating Countries
2013



- Representative samples of 1,000 adults per country in 26 countries ($n=27,312$).
- Some urban-only surveying in certain developing countries.
- Face-to-face and telephone interviewing between December 2012 and April 2013.
- Within-country sample error of +/-2.8 to 4.9 per cent, 19 times out of 20.
- All figures in the charts are expressed in percentages, unless otherwise noted.

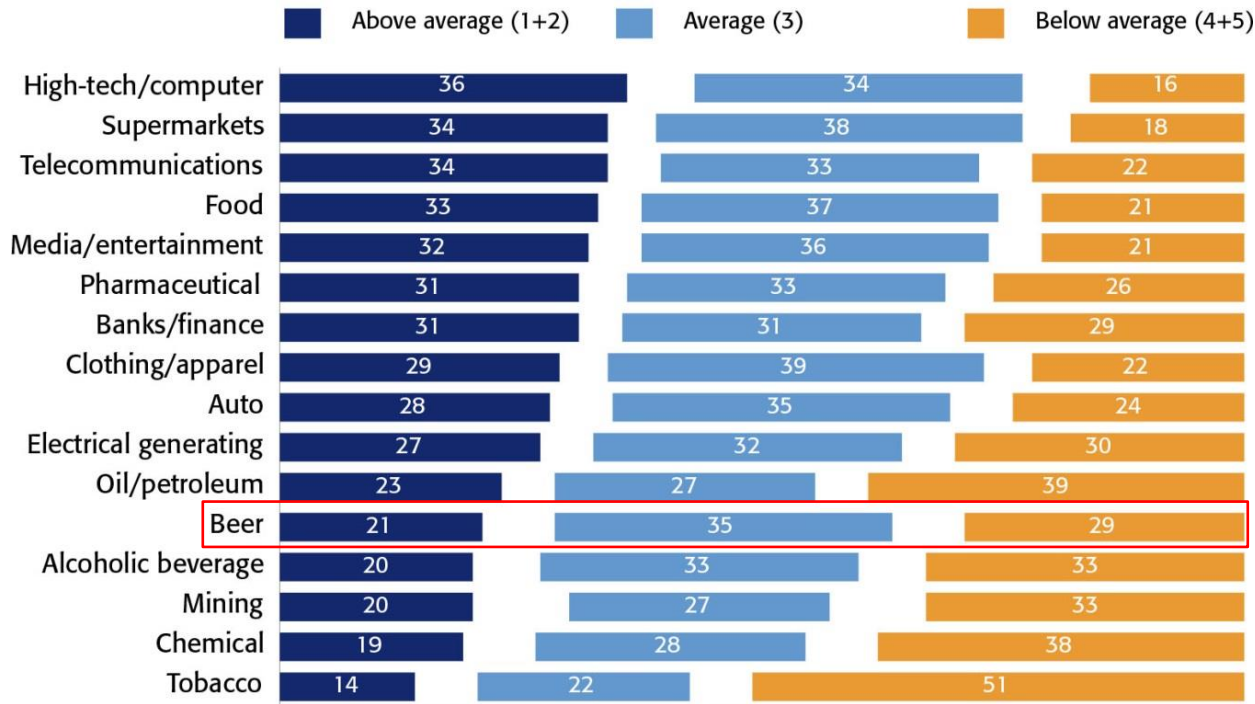
Key findings

- The beer industry is seen as being among the worse CSR performers and its net performance is seen as having declined since 2011.
- Nowhere is the beer industry seen as the top performer on CSR. Its ranking varies widely between nations, though it is considered the second highest performer among Germans.
- Among Indonesians however, the industry has an extremely negative perception in terms of its CSR performance. Ghanaians are most positive.
- The industry's CSR performance is seen as having fallen in many countries, including Germany and Russia. However, despite new restrictions imposed on the sale of alcohol, the beer industry's CSR performance has surged in Turkey since 2011.
- Unprompted, six per cent of respondents said they wanted to see the products from the alcohol industry become more socially responsible. This is half the number who said the same thing about the most-often cited industry, processed food.

Beer industry seen as being among the worse CSR performers

CSR Performance of Industry Sectors

Average of 23 Countries,* 2013



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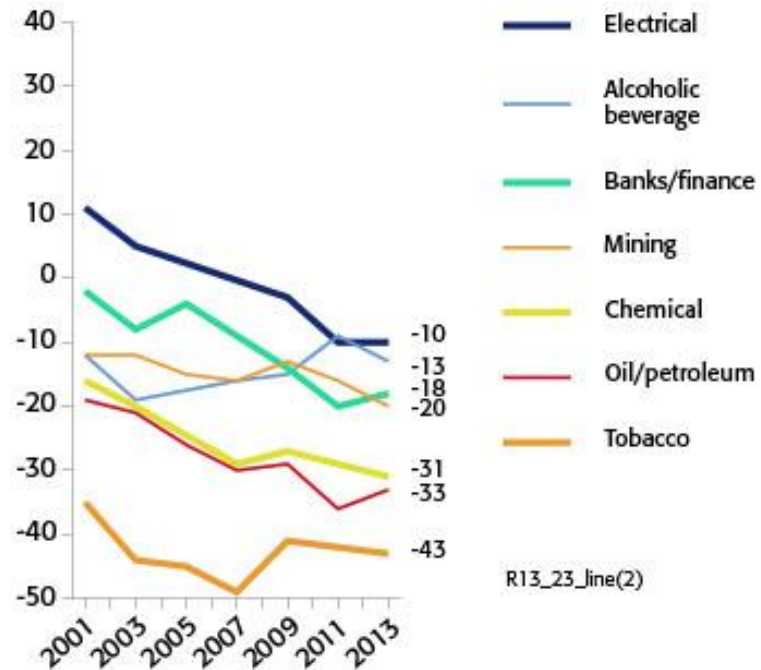
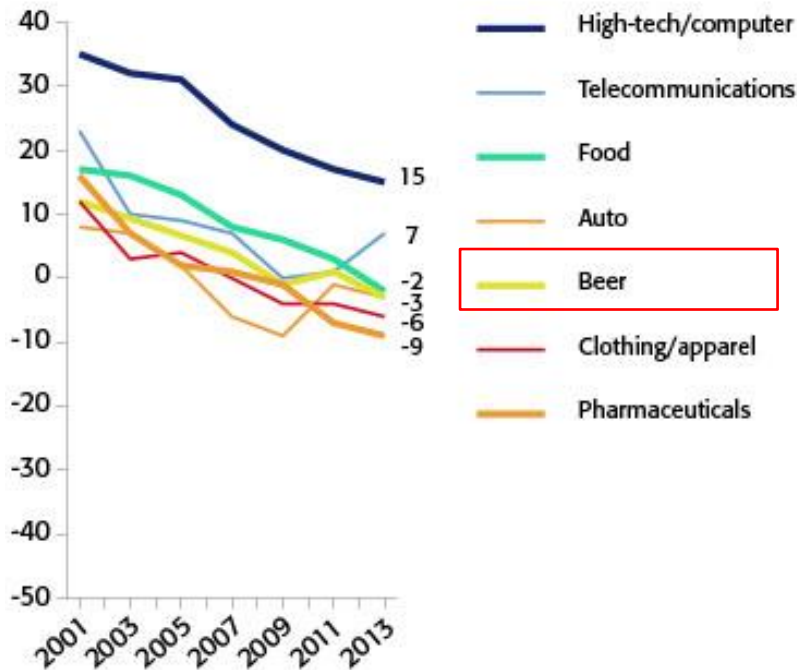
The white space in this chart represents "Depends," "No opinion," and "DK/NA."

*Includes Argentina, Australia, Brazil, Canada, Chile, China, France, Germany, Ghana, Greece, India, Indonesia, Kenya, Mexico, Nigeria, Pakistan, Peru, Russia, South Korea, Spain, Turkey, UK, and USA

Industry's CSR perception shows slight fall since 2011

CSR Performance of Industry Sectors

Net,* Average of 11 Countries,** 2001–2013



**"Among the best" and "Above average" minus "Below average" and "Among the worst"

**Includes Australia, Canada, Chile, China, France, Germany, Mexico, Russia, Turkey, UK, and USA

The following sectors were not asked in France in 2005: telecommunications, banks, auto, chemical, electrical, beer and alcoholic beverage. Telecommunications, banks/finance not asked in France in 2006.

Beer industry's CSR performance rated second highest among Germans

CSR Performance of Industry Sectors
Ranking by Net* Rating, by Country, 2013

	Argentina	Australia	Brazil	Canada	Chile	China	France	Germany	Ghana	Greece	India	Indonesia	Kenya	Mexico	Nigeria	Pakistan	Peru	Russia	South Korea	Spain	Turkey	UK	USA
High-tech/computer	2	1	7	2	1	2	5	2	9	1	3	3	7	5	6	7	4	1	1	3	2	1	1
Supermarkets	3	8	5	1	5	7	7	7	8	4	7	6	4	3	3	2	2	2	12	1	1	6	2
Telecommunications	11	3	10	4	7	3	1	5	5	2	10	1	3	6	4	8	9	2	5	10	4	2	3
Food	1	4	1	7	2	15	10	11	3	6	7	9	8	1	2	6	1	9	9	2	6	8	4
Media/entertainment	7	6	2	5	9	4	2	4	3	12	2	11	2	4	1	3	7	4	4	7	10	5	11
Pharmaceutical	4	5	3	12	15	13	8	8	2	9	4	5	10	2	6	9	4	9	7	4	6	3	10
Banks/finance	10	10	8	8	12	1	13	15	1	14	1	2	1	12	5	1	6	8	3	16	8	15	12
Clothing/apparel	5	9	11	11	4	6	9	9	6	5	5	10	5	7	6	4	3	7	6	5	5	9	9
Auto	8	2	9	10	7	7	11	1	10	7	6	6	9	8	9	5	13	11	12	6	3	7	7
Electrical generating	12	12	6	9	14	10	3	12	15	10	11	4	5	9	12	14	8	5	2	9	9	11	5
Oil/petroleum	14	15	4	15	11	5	15	16	13	15	9	8	13	15	11	10	14	12	14	15	10	14	15
Beer	6	7	12	3	6	9	4	2	11	2	15	16	12	10	14	16	10	14	8	11	12	4	6
Alcoholic beverage	8	10	13	6	10	11	6	6	12	8	14	15	11	11	15	13	12	16	9	13	15	10	8
Mining	15	13	14	13	3	15	12	10	14	11	11	12	14	16	13	11	15	6	9	12	14	12	13
Chemical	13	14	15	14	13	12	14	14	7	16	13	13	16	13	10	12	11	13	15	8	13	13	14
Tobacco	16	16	16	16	16	14	16	13	16	13	16	14	15	13	16	15	16	15	16	14	16	16	16

R13_CSR_table_2

■ Increase in "Among the very best" and "Above average" ratings compared to 2011
 ■ Decrease in "Among the very best" and "Above average" ratings compared to 2011
 ■ Tracking data not available

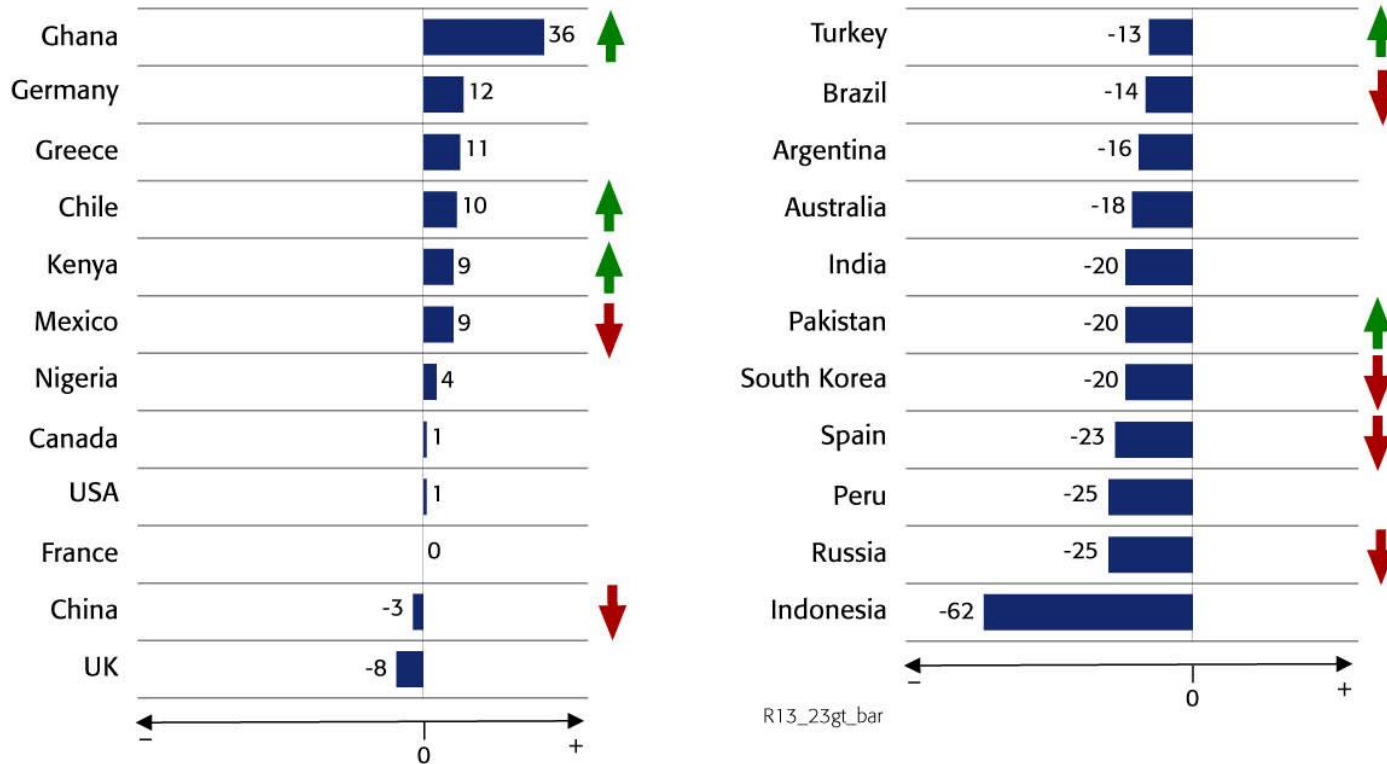
*Net equals "Among the best" and "Above average" minus "Below average" and "Among the worst." Highlighting refers to a change of 6% or more since 2011.

Q23. Please rate each of the following types of companies on how well they fulfill their responsibilities to society. Compared to other types of companies, would you say [INSERT COMPANY TYPE] are?

World's largest Muslim nation most negative about beer industry's CSR performance

CSR Performance of the Beer Industry

Net Ratings,* by Country, 2013



*Net ratings equal "Among the best" and "Above average" minus "Below average" and "Among the worst."

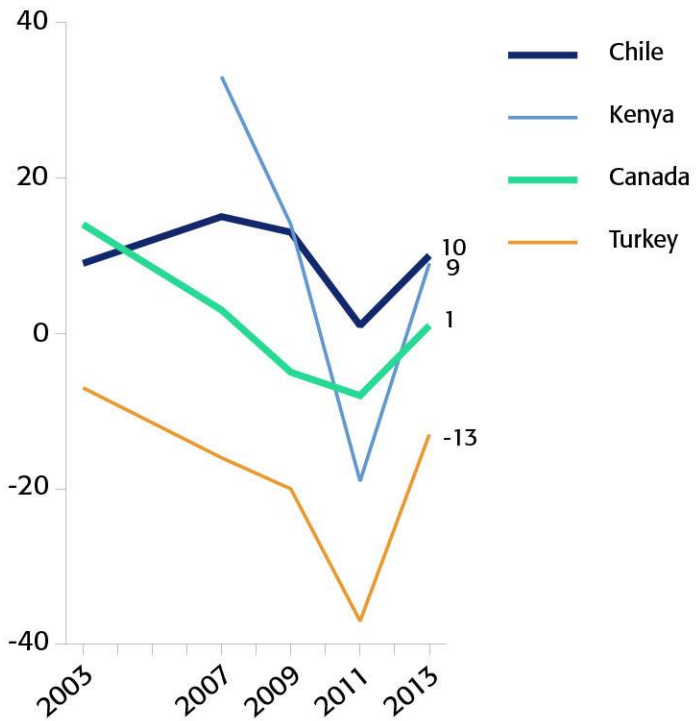
Green arrows indicate an increase of 6% or more in "Among the very best" and "Above average" ratings compared to 2011, while red arrows indicate a decrease of 6% or more.

Despite new restrictions on alcohol, perceptions of beer industry's CSR efforts rebound in Turkey

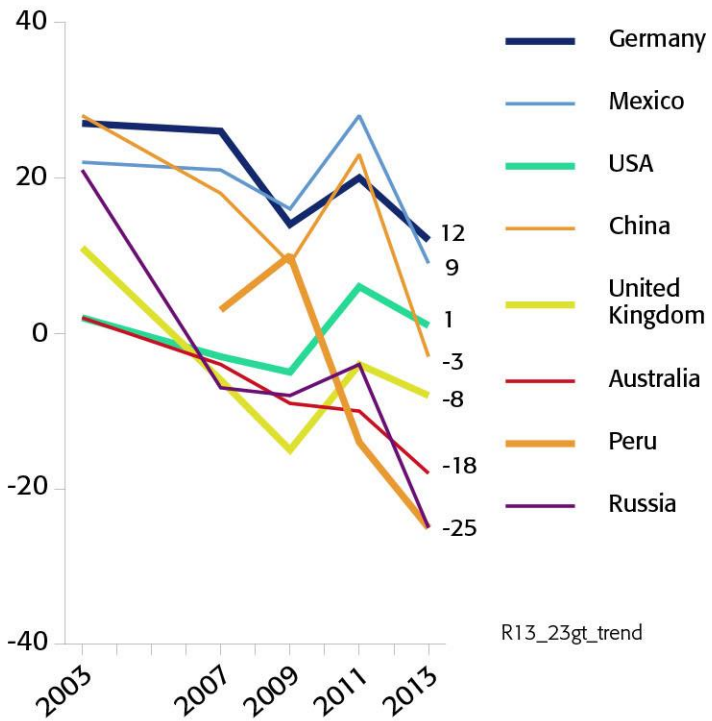
CSR Performance of Beer Companies

Net Ratings,* Trends: 2003–2013

Increases and stable



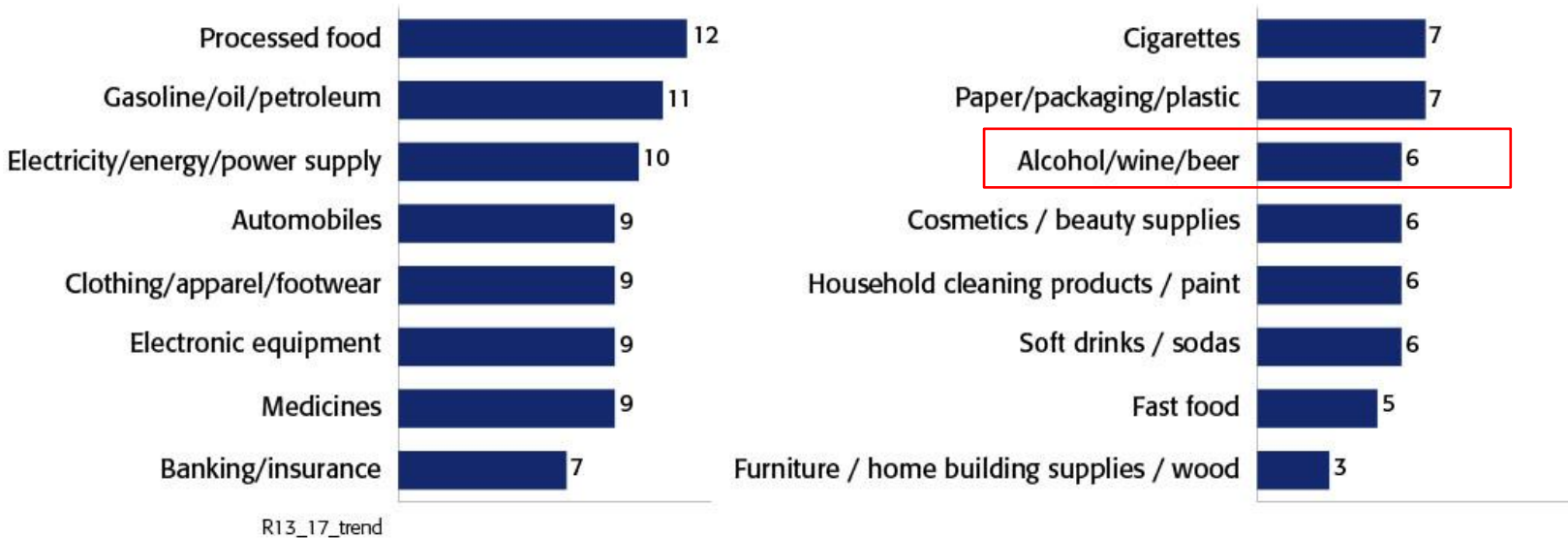
Decreases



*Net ratings represent "Among the very best" and "Above average" minus "Below average" and "Among the very worst."

Six per cent, unprompted, want to see more socially responsible beer

CSR Product Offerings Most Wanted
Unprompted, Average of 18 Countries,* 2013



*Includes Argentina, Australia, Canada, Chile, China, France, Germany, Ghana, Greece, India, Indonesia, Kenya, Mexico, Nigeria, Peru, Turkey, UK, and USA

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For more information, please contact:

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