

Stiegl: next on the agenda

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ABSTRACT

This objective of this paper is to gain an understanding of how Stiegl has risen to become the largest privately owned brewery in Austria and develop potential consolidation and growth strategies for Stiegl to remain competitive in the future. This will be done by first utilizing the Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis. Next, an analysis of both Stiegl's positioning strategy and marketing mix will be undertaken. The analysis would help us frame the recommendations for Stiegl., including potentially partnering with an established multinational corporation in order to expand substantially outside the borders of a saturated Austrian market.

INTRODUCTION

The Austrian beer market is well established and very saturated with hundreds of breweries currently in operation. The country indeed offers some of the best customers in the world. In 2006, Austrians were third in the world in terms of beer consumed on an annual basis at approximately 108.9 Litres of beer per capita. The only people that drank more were people from Germany who drink about 115.8 Litres of beer a year and the Czech Republic who drink an impressive 160 Litres of beer (IRUE, 2010). In 2008, however, Austria took over Germany to be "crowned the second-biggest beer drinkers in the world" (Austrian Times, 2010).

To help quench the thirst of the approximately 8.4 million Austrians breweries produced around 9 million hectolitres of beer in 2006. There is approximately one brewery per 56,860 people in Austria, which is one of the highest ratios in the entire European Union. Of course, not everyone in the country wants to drink the same beer; between these breweries they provide over 600 kinds of beer for their loyal customers (IRUE, 2010). These beers come in all kinds of shapes and sizes with the predominant drinking vessels being .5 Litre bottles and .5 Litre cans which accounted for 48% and 18.1%, respectively, of all beer sold in 2003 (Pattinson, 2010).

As one can imagine, the Austrian beer industry is very competitive. There are 146 establishments currently brewing beer, almost all of which are privately owned and 90 of which that are home breweries (IRUE, 2010). The 116 breweries that employ less than 20 people account for just 1.8% of the beer sold in Austria. The 10 slightly larger breweries of 20 to 50 people account for 3.9% of the total market share. 23.6% of the beer consumed can be credited to the nine breweries that have 100-500 workers. Finally, the 7 breweries that have 500-1500 employees have the majority of the market share at about 67.6% (Pattinson, 2010).

There are several significant points about the Austrian alcohol regulations worth mentioning that differ from that of North American countries such as the United States and Canada. Indeed, many of the people accounted for in the ratio of breweries to people are underage in the North American context;

however, similar to many other European countries, the drinking age in Austria is 16. Clearly, for beer companies this means a larger proportion of the population are potential customers. When one also considers that drinking age limits are very rarely enforced, the market becomes even bigger.

In 2006 a European Union commissioned report stated that “on average, [students] now start [drinking] when they’re just 12 and a half years old” (Oleksyn, 2008). The fact that beer in Austria is sold in vending machines further illustrates this point. In addition, there are no limits to what time alcohol can be served at. This means that bars and restaurants are open much earlier, often 6 o’clock in the morning, and that other places such as gas stations and other food establishments can sell alcohol all night.

Stiegl was established in 1492 in Salzburg, Austria. The company is such a significant part of the history of the city that when school children study the year 1492 they learn both about the founding of Stiegl and the discovery of America. However, the company only really started to emerge as a national contender when Dr. Heinrich Dieter Kiener became the owner in 1990; the brand quickly grew into the largest privately owned brewery in Austria. The company motto of “Whatever you do, do it fully,” still guides the company and illustrates their commitment to uncompromised quality (Stiegl Website 2010).

Under Dr. Kiener the Stiegl brand has grown to represent 13% of the entire Austrian beer market. With nine beer storage points strategically placed throughout Austria, there is no region hidden from Stiegl’s distribution channels (Rainer, 2010). Not surprisingly, the company has become a point of pride for not only the residents of Salzburg, but to anyone that calls Austria their home. There is still a lot of potential for growth of the Stiegl brand and market share.

This objective of this paper is to gain an understanding of how Stiegl has risen to become the largest privately owned brewery in Austria and develop potential consolidation and growth strategies for Stiegl to remain competitive in the future. This will be done by first utilizing the Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis. Next, an analysis of both Stiegl’s positioning strategy and marketing mix will be undertaken. The analysis would help us frame the recommendations for Stiegl.

1. SWOT ANALYSIS

The SWOT analysis matrix (Table 1) is given on the following page. I have utilized questionnaire survey data as well as company/industry reports for analysis. A discussion of each element follows.

<p>Strengths Most modern brewery in Europe - Able to use much less water Brews after the Bavarian Purity Law - People know it is a quality product It is a local company - People see it as a point of national pride - Can use this as strategic advantage of largest competitor</p>	<p>Weaknesses Funds are more limited than that of its biggest competitors - Harder to compete for market share when budget is more limited comparatively Costs more to produce beer - Because costs are higher they have less money to spend elsewhere</p>
<p>Opportunities Environmentally friendly company - Can market themselves as more environmentally friendly than competitors Large competitor bought by Heineken in 2003 - Has recently started to lose customers due to declining quality International expansion</p>	<p>Threats Austrian beer industry is saturated - Less room for growth and expansion Barley prices rapidly rising - Making it more expensive for them to brew compared to breweries that do not use barley</p>

Table 1: Stiegl SWOT analysis

1.1 STRENGTHS

Since the establishment of a new brewery in 2005 in Salzburg, Stiegl has owned the most modern brewery in Europe. Compared to its competitors, this means that they can produce much more efficiently and quickly. In terms of efficiency, they can actually produce one litre of beer using just four litres of water. To provide some perspective, the majority of breweries are usually using eight to ten litres of water per litre of beer (Rainer, 2010). This comparative advantage saves Stiegl money and makes them a more environmentally friendly brewery.

The beer at Stiegl is brewed using the Bavarian Purity Law. This law states that “just barley, water, hops, and yeast can be used” (Toronto Star, 2001) as ingredients. Together these ingredients make the highest quality and best tasting beer (Rainer, 2010). As not all beers are brewed using this law, many people look for the “brewed according to the Purity Law” (Carlsberg, 2010) label on a beer before they buy it. Due to this fact, people know they are getting a high quality product when they purchase Stiegl and are therefore willing to pay a premium to get it.

Stiegl is well established in the Austrian market. In 2001 it had a market share of approximately 9.3% of beer sold in Austria (Pattinson, 2010). Since then it has risen to take over approximately 13% of the Austrian beer market (Rainer, 2010). This figure makes it the single largest private brewery in the country and the second largest beer company overall. Another strength is that it is the largest local beer company. Some of its largest competitors cannot make this same claim because they are owned by Brau Union which is owned by Heineken, a large multinational from the Netherlands. Being such a well-known and popular beer means that Stiegl has a strong platform to start from in pursuing any of its opportunities.

1.2 WEAKNESSES

One of the weaknesses of Stiegl is that it does not have the same funds as that of the Brau Union. Since Brau Union owns and operates several of Stiegl’s direct competitors, including the Gösser, Zipfer, Schwechater, Wieselburger and Puntigamer breweries, this is one disadvantage that they must endure while they compete for further market share.

One of the consequences of Stiegl producing very high quality beer is of course that it costs them significantly more. For instance, many beer companies worldwide buy rice as a substitute for barley in their beers because it saves them a lot of money; however, to maintain their premium status, Stiegl continues to use barley even as the price is constantly rising.

1.3 OPPORTUNITIES

In a survey conducted at Johannes Kepler University to help with my research, I was curious to find the answer to the yes or no question: “if you know a certain beer company is environmentally friendly, does it increase your chances of buying from them?” A majority of the 43 respondents, at 58.7%, answered yes (Please refer to Appendix 1 to see the rest of the survey questions and results). This is not surprising considering that more and more awareness is being created about the significance of human effects on the environment and the consequences they will and are having. Another one of the questions I asked was whether they had any idea Stiegl as a company was more or less sustainable than other beer companies in general; possible answers included “yes”, “no”, or “I don’t know”. Interestingly, 100% of the people surveyed answered with “I don’t know”. As a large number of the respondents were not from Austria and have only been in Austria for a few months, it is to be expected that the majority of them would not have any idea of this answer; however, the most unexpected part was that all of the

Austrians that filled out the survey also did not know. It is unexpected because Stiegl is very enthusiastic about how environmentally friendly the company is as compared to its competitors (Rainer, 2010).

Here Stiegl may have an opportunity to enter a potential market segment of environmentally conscious consumers. The company, as previously stated, uses less than half of the water that the average brewery uses. This is very significant because “water scarcity, not future oil shortages or global warming, is the greatest crisis facing humanity in the 21st century and possibly beyond” (Singh, 2008). In addition, “according to the UN, 1.2 billion people currently do not have access to clean drinking water, and half of the world’s population lacks adequate water purification” (Singh, 2008). If Stiegl can increase the awareness of their dedication to reducing water usage then they will be able to capture a larger part of the Austrian market that is concerned about the environment. Moreover if the company raises awareness of the crisis of water in general, it will complement their environmental marketing strategy.

Stiegl is also proud that they predominantly use glass for their beer containers. In fact 95% of their beer is sold in glass bottles; this is as opposed to the average of 70% for the other Austrian beer companies. This is significant because it is more environmentally friendly to manufacture glass bottles than cans; glass is highly recyclable and new bottles often contain a “significant percentage of post-consumer salvage” (Portland Tribune, 2009). This is as opposed to aluminum which during production can produce around 5 times its own weight in caustic waste. In addition, for whatever reason, people tend to recycle glass bottles much more than cans. In 2005 “more than half of the 100 billion cans sold in the United States...ended up incinerated or in the landfill” (Portland Tribune, 2009).

Stiegl also has the opportunity to further promote its organic products such as its Paracelsus Zwickl brand. The organic ingredients are grown by very tightly monitored, 100% organic farmers. However, although many people know that organic farming is a good thing, many people do not know exactly what it is and what the benefits really are. Since “organic farming practices are designed to encourage soil and water conservation and reduce pollution” (Mayo Clinic, 2008) it is another factor that can definitely bolster Stiegl’s reputation as an environmentally friendly brewery. One way that farmers do this is by using natural fertilizers, such as manure or compost, to feed soil and plants; this is as opposed to the chemical fertilizers used by conventional farmers. Further, organic farmers use “beneficial birds and insects, mating disruption or traps to reduce pests and disease” (Mayo Clinic, 2008) rather than simply spraying insecticides to achieve the same goal. They also manage the threat of weeds by avoiding herbicides all together, opting instead to use the old fashioned method of rotating crops, till, hand weed, or mulch (Mayo Clinic, 2008). Therefore, the other opportunity that is presented by these facts is that Stiegl can market itself as a healthier product.

The acquisition of Brau Union by Heineken in 2003 has slowly decreased the quality of the beer at each of their breweries (Rainer, 2010). This has opened up a window of opportunity for Stiegl to steal away some more of the market share. Although there is some brand loyalty for beer companies, it is relatively low; in the end people simply want to enjoy the best beer in their price range. That being said, there is enough brand loyalty that it takes time for customers to start consistently drinking a different beer if they have been drinking the same brand for years, even decades. The approximately 4% increase in market share since 2001 for Steigl can definitely be, in part, attributed to Heineken’s purchase of Brau Union and there is still room to capture more (Rainer, 2010).

1.4 THREATS

The rising price of barley is a major threat. Since April 2008 the price has risen from approximately \$82.80 US dollars per metric ton to \$174.60 per metric ton (Monga Bay, 2010). Stiegl uses approximately 20,000 tons a year of barley a year. This means that compared to two and a half years ago, they spend

approximately \$1,836,000 more per year (Rainer, 2010). Clearly this is a figure that cannot be ignored. The question for Stiegl then becomes: when is it no longer worthwhile for them to stay committed to the Bavarian Purity Law? That is, when does it become more economical for them to sacrifice quality and start using rice? One way to help answer this question is to perform a cost-benefit analysis of the two options and see which one proves to be the best option. There are also many qualitative factors to consider in making such a decision. In the survey question that was posed for respondents that gave them the chance to select from a list of options to explain why they buy Stiegl, the majority weighed in at 35.5% and claimed it was because of its quality taste. Indeed, this would be a difficult decision and one that Stiegl may have to face in the not too distant future considering that barley prices are still consistently and quickly growing (MangoBay.com).

2. POSITIONING STRATEGY

2.1 SCOPE

Stiegl is a premium beer brand catering to the portion of the Austrian market that wants a high quality local beer in terms of taste. Although they still do all their brewing in Salzburg, they have expanded their reach across all of Austria by building eight other large storage points in Wien, St. Stefan, Flachau, Traun, Neuhofen, Bruck, Wörgl, and Inzing. Although this gradual expansion has vastly increased Stiegl's capacity and is a large reason for why they are the largest private Austrian beer company, they are able to maintain their competitive advantage of being a local Austrian company. The company has also relatively recently entered into the international market; however, thus far only 2.7% of its total sales are outside of its home country (Rainer, 2010).

2.2 STRATEGIC ORIENTATION

Stiegl's products are offered as premium quality refreshments. The company is a well known local brand from Salzburg city offering its customers high quality beer. Their beers are available in supermarkets, restaurants and other food related establishments, and bars and pubs, which make them accessible and convenient for their customers. Since their target market is simply Austrians, a very wide customer segment, Stiegl has decided that the best way to reach their customers is by offering their beers in as many locations as possible.

2.3 DIFFERENTIATION

Stiegl beers are brewed using unique recipes that have been perfected over hundreds of years. They claim to have a beer that is less bitter than their competitors which people like and are able to drink more of. Being a premium brand, the company brews using the Bavarian Purity Law. They are marketed as being a very local and traditional Austrian beer and are identified by their very familiar red staircase (Rainer, 2010).

2.4 DEFENSE

Beer recipes and brewing techniques have been mastered since the brewery's establishment and therefore cannot be copied by competitors. My survey revealed that 58.1% of people rate Stiegl as having an "above average" taste as compared to other beers and the majority of people, at 32.6%, buy Stiegl because it tastes the best. The evidence based on the survey states that a large percentage of people enjoy Stiegl's beer. In addition, the brand is clearly established and recognized for their quality and for being a local Austrian company. They also have well established distribution channels.

2.5 BRAND PERSONALITY

Stiegl is a local Austrian product. When a thirsty customer is looking up and down the aisle of his local supermarket he knows that “it has to be a Stiegl”. The products stand out as being premium with their famous red staircase which has come to be “an unmistakable symbol in Austria for “the art of brewing at the highest level”” (Stiegl Website 2010). The product is associated with being some of the best that Austria has to offer and is a point of national pride.



Figure 1: Famous red staircase logo

3. MARKETING MIX

3.1 PRODUCT MIX

3.1.1 Concept

The core product that Stiegl provides is partly comprised of the feelings that the customer experiences during the purchase and consumption of the beer. The company’s customers feel a sense of national pride when they drink Stiegl because they know it is a local product and because of the unique and vivid red and white logo. In addition, the customer feels satisfied that their thirst is quenched with a delicious tasting beer. Finally, the core product also provides the customer the benefit of having a beer that is a status symbol in Austria as it is a premium product. The value that Stiegl provides is derived from its ability to elicit these feelings of pride, satisfaction, and status.

The actual product is very simple and can be described as being a beer that comes in several containers, including .33 and .5 Litre bottles or .5 Litre Cans, and is made using quality ingredients that abide by the Bavarian Purity Law. The labels spell out Stiegl in large red letters that incline from left to right up the red staircase and includes “Salzburger” across the top. The brand name, Stiegl, is enough to make customers confident that they are going to get a quality product because of the company’s hundreds of years of experience in the art of brewing beer. All of these aspects of the actual product are carefully designed to deliver the desired core product.

3.1.2 Mix

The product mix consists of one brand, Stiegl. Under this brand umbrella is a width of 10 products including individual beers, packs of six, twelve, and eighteen, and miniature kegs, each of which comes in either cans or bottles. The length of each of these 10 products is 6 and consists of Goldbräu, Paracelsus Zwickl, Leicht, Pils, Radler, and Weizen Gold beers.

3.1.3 Service Strategy

Since Stiegl’s products are tangible goods and in general they do not sell them themselves, their service strategy is not very extensive. However, they do interact directly with the public through hosting tours of their state of the art brewery and Museum, both of which are located in Salzburg. The museum gives its customers an idea of the rich history that is behind the Steigl brand. It gives visitors the chance to see how the business began and how it has



Figure 2: Stiegl museum in Salzburg

evolved over time. The brewery on the other hand gives customers the opportunity to see how Stiegl is operated and performs in the present. At the end of each of the tours, visitors are given a free gift and three free beers from the Stiegl pubs. Both experiences give the customer a chance to identify more closely with Stiegl, essentially creating or strengthening brand loyalty to the company.

3.2 PRICING

3.2.1 Objective

The main pricing objective of Stiegl has been the image enhancement objective. They would have chosen this objective because it supports their premium product brand image. They would not have chosen profit maximization because their goal was to make Stiegl known for being a high quality beer rather than just a cheap beer that is no different than any other on the shelf. Similarly, the high volume objective would not have suited Stiegl because they again want to be known for being a high quality beer rather than a beer that people buy on any occasion.

3.2.2 Strategy

To support their image enhancement objective Stiegl implemented a premium pricing policy that they still maintain. In addition, the brand uses uniform delivered pricing, meaning that a uniform shipping cost is added to the price regardless of where the product is distributed to in Austria. The goal of the former pricing strategy is to ensure that people actually perceive the company's beer as being of a very high quality; of the latter it is to make sure that people know how much they will pay no matter where they are in the country. This pricing strategy makes sense because people are willing to pay for the quality they perceive Stiegl as offering and because the brewery already has a strong customer base. As a bonus, Stiegl prices, although more expensive than the majority of its domestic competitors, is just under most of the prices of imported beers. Since people know that imported beers are always more expensive, regardless of quality, simply because they are imported, they know that they can pay a bit less and get a very high quality Stiegl beer.

3.3 PLACEMENT & DISTRIBUTION

Stiegl uses a variety of channels to get their products into the hands of the customers, including supermarkets, bars, pubs, restaurants, gas stations, and virtually any type of establishment that sells drinks and food. The company's channel design approach is therefore primarily traditional. The company does have a relatively small novel approach as well; Stiegl has a variety of souvenirs that can be bought through their website.

Stiegl has a strong distribution system established and uses a manufacturer-retailer-consumer indirect channel design. The product is delivered to the retailers who then sell to customers. The company has made it easy to maintain this type of channel by building nine storage points throughout Austria. The company delivers beer to these storage points from their brewery in Salzburg primarily using their own trucks. From these points the beer can be delivered to local retailers as needed (Rainer, 2010).

3.4 PROMOTION & COMMUNICATION

Stiegl has invested heavily in many different kinds of promotional tools in order to effectively advertise and promote the brand image it wishes to convey. The majority of this is done using television, radio, flyers, magazines, the internet, and banners and billboards. Potential customers do not have to travel far before they see an advertisement reminding them that Stiegl is the beer they should buy. The company

does not engage in promotional activities that relate to reducing the price of their beer (Rainer, 2010). This is because by doing so the company is essentially telling people that, if you want the quality product that is Stiegl, you have to pay for it, effectively supporting their premium product status.

Sponsorship is another form of promotion that Stiegl is heavily invested in. Their two biggest sponsorship contracts are with the Austrian Nordic ski team and the Austrian football team (Rainer, 2010). Since football is not only the most popular sport in all of Austria, but also Europe and the rest of the world, this is a very significant sponsorship deal. Stiegl's trademark red and white logo perfectly fits in with the sea of red and white fans that appear at any given Austrian sports event. As Brau Union sponsors the Austrian slalom ski team, the rivalry is heated not only by the competition to be the best between the ski teams, but also by the competition of their sponsors. Fortunately for Stiegl, the Nordic ski team has for a long time been much more successful (Rainer, 2010).

RECOMMENDATIONS & CONCLUSIONS

It is recommended that Stiegl increase the general awareness of their dedication to reducing water usage; by doing so they will be able to capture a larger part of the Austrian market that is concerned about the environment. Based on the survey results, this part of the Austrian market is large; 89% of the Austrian respondents said they would be more likely to purchase from a brewery if they know that they are more environmentally friendly than their competitors. In addition, if the company raises awareness of the crisis of water in general it will complement their environmental marketing strategy. This can be done for instance, through their website or briefly on some of their products; or Stiegl could invest in a full marketing campaign that raises this awareness. In addition, the company should raise awareness of its commitment to using the more environmentally friendly glass, as opposed to aluminum. Stiegl can eventually eliminate cans from its production altogether.

It is also recommended that Stiegl further promote its organic products such as Paracelsus Zwickl. Indeed, Stiegl has its own biological farm in Upper Austria where they grow their own organic wheat, hops, and barley. Therefore, the other opportunity that is presented by these facts and that Stiegl should capitalize on is that Stiegl can market itself as a healthier product than its competitors.

Stiegl up until now has made a point not to use promotional techniques that give discounts or "freebies" to customers as they do not want to take away from their image as a premium product; however, this mindset limits their possibilities for effectively engaging customers through Customer Relationship Management (CRM) programs. It is recommended that Stiegl invest in a customer loyalty program that rewards customers for purchasing any Stiegl product. Since Stiegl only sells its beers through retailers, it makes most sense to put codes on the inside of boxes. Customers could then take these codes to the website in order to enter them and earn points. Of course, beforehand they will have had to have created an account at their website. This approach offers several advantages. First, customers can be informed of upcoming events that Stiegl may be sponsoring. This information could be customized based on the information that the customer has provided. For instance, a university student might be told about a party at a night club on campus whereas an older customer may have a restaurant recommended to them. Next, when customers visit the website and login to their account they can have information pushed onto them that they may not otherwise see such as information about how Stiegl is environmentally friendly or how they are involved with the community. Finally, the prizes they receive



Figure 3: Stiegl advent calendar

can also be based on the customer information. Based on site preferences the website can recommend products that they might also enjoy and also offer these recommended products as prizes so that the customer is more likely to try them. In the end, this CRM strategy will promote customer loyalty to a level beyond that which would have ever been possible in the past.

Stiegl already has a popular Christmas item that packages several of their beer products together. It is the Stiegl advent calendar and, as one would guess, it contains a different beer for each day that the customer opens it. It is recommended that the company take this proven idea of packaging products together and put on promotions where they package souvenirs with their beers. They already have an array of souvenir products; however, they are only available online or in the store in Salzburg. If the company starts packaging these products with their beers or giving them out at bars and pubs then they will benefit in two ways: firstly, potential customers will be more likely to purchase Stiegl beer; secondly, these products provide for an easy form of relatively cheap marketing. An example of this cheap marketing is when customers wear Stiegl clothing in public.

A final recommendation for Stiegl is that they expand beyond the borders of Austria in a more significant way. Although they have begun to expand slightly, exports still only account for 2.7% of their total revenues and have not increased significantly in recent years. It is important for Stiegl to do this because, even though they can steal away market share from their competitors in Austria, it is a saturated market, meaning their growth potential is limited. It is recommended that Stiegl consider partnering with a large multinational so that they can reasonably compete on an international stage.

The important point here, however, is that Stiegl has to make sure that they do not make the same mistake Brau Union did when they were bought by Heineken; they must hold on to their national identity and be proud of it. Although Brau Union and all of its subsidiaries are very popular in Austria, Stiegl's competitive advantage over them is that they are a local brewery. They can hold on to their national identity in a few ways. First, they must ensure that people know worldwide that Stiegl is an Austrian beer. They must make sure that "Salzburger" remains at the top of their logo and that their international advertising campaigns are centered on their Austrian heritage. The Molson Brewing Company of Canada proved that this type of international expansion is possible while still maintaining the feel of a local brand. In 2005, it partnered with Coors, an American company, and risked losing its local appeal; however, it maintained a large part of its competitive advantage by using the "Canadian" marketing campaign. This campaign has been very successful at fostering feelings of national pride, especially through its television commercials. If Stiegl can put on a similar campaign in Austria that elicits feelings of national pride after they partner with another company they will be able to maintain most of their competitive advantage.

Stiegl is well established in the Austrian beer market; they have a strong customer base that has been built on their commitment to quality and the competitive advantage of being a local company. This market is saturated, with over 140 breweries providing roughly 600 beers for customers to choose from; however, if Stiegl can implement the aforementioned recommendations regarding marketing their relative sustainability, implementing a CRM system, and providing more packaged products, the company will be able to continue their trend of gradually increasing their market share. In addition, in the long run, if they can strategically partner with a multinational without sacrificing their competitive advantage of being perceived local company, then they will be able to drastically increase profits in the long run.

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APPENDIX 1

1. How often do you consume beer per week?

Never	Once	2-3 times	4-7 times
0%	32.6%	53.5%	14.0%

2. Which of these Austrian beers do you usually buy?

Egger	Stiegl	Gösser	Ottakringer	Zipfer	Other
2.3%	48.8%	4.7%	20.9%	11.6%	11.6%

3. How do you rate Stiegl, based on these attributes, compared to other beers in general?

Attribute	Poor	Below Average	Average	Above Average	Great
Taste	2.3%	4.7%	20.9%	58.1%	14.0%
Value	2.3%	2.3%	53.5%	37.9%	14.0%
Quality	2.3%	2.3%	37.2%	44.2%	14.0%
Can/Bottle Design	0%	14.0%	44.2%	30.2%	11.6%

4. Why do you buy Stiegl?

Best taste	Best value (best taste for price)	It is a status symbol	Most visually appealing	Other
32.6%	23.3%	16.3%	4.7%	23.3%

5. Where do you most often purchase Stiegl?

	Most Often	Second Most Often	Least Often
Supermarket	74.4%	11.6%	14.0%
Restaurant	4.8%	33.3%	61.9%
Pub or Bar	20.9%	55.8%	23.3%

6. When you buy Stiegl from the supermarket, which of these products do you most often purchase?

Can	Small Bottle (.3L)	Large Bottle (.5L)	Other
14.0%	11.6%	69.8%	4.7%

7. How do you drink Stiegl? (May select multiple answers)

Casually/Socially	Binge Drinking	Special Occasions	Other
72.1%	37.2%	18.6%	7.0%

8. If you know a certain beer company is environmentally friendly, does it increase your chances of buying from them?

Yes	No
58.7%	41.3%

9. Do you think of Stiegl as being more or less environmentally friendly than other beer companies?

More	Less	I Don't Know
0%	0%	100%