Report Brochure

LOWER ALCOHOL WINES

A MULTI MARKET PERSPECTIVE

JULY 2013

REPORT PRICE: GBP 1,000 or 2 Report Credits

Contents

Excerpts from the introduction

"Once considered a niche, outsider product category, lower alcohol wines are now growing in stature in many markets around the world. Across the 8 markets looked at in this report buyers of sub 10.5% ABV wines now account for 38% of consumers, or in other terms, over 80 million regular wine drinkers / wine drinkers - making a rather compelling case that this is a market sector which can no longer be ignored"

"From the 8 markets analysed in this report lower alcohol wines are currently performing best in the USA, Germany, Canada and UK where the number of lower alcohol buyers and consumption of sub 10.5% ABV wine is the highest"

"One of the main challenges for the lower alcohol category is the breadth and depth of legislation affecting it. Given the almost constant negotiations involving the EU, and various governments taking ever more stringent positions with their alcohol policies, it is unlikely the landscape will remain stable for long."

"The picture is made more complicated because, aside from the questions of taxation and regulation, there is not yet a universally accepted definition of what constitutes a lower alcohol wine. But while the trade worries about these technicalities, consumers are deciding – in growing numbers – that this is a category that fits in with their changing priorities."

"Although countries such as Denmark and France could be seen as currently lagging behind this does not tell the whole story as France may be the place to watch in the future, having the highest proportion of 'potential' buyers. It will be through successfully targeting the 'potential' buyer segment, currently numbering some 35 million regular wine drinkers / wine drinkers across the 8 markets, that lower alcohol wines may make that final push into the mainstream."

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Methodology (1)

3 segments of lower alcohol wine / wine based beverage drinkers based on likelihood to buy wine in the 1-5.5%, 6-8.5% and 9-10.5% categories

- Buyers
  = those who answered "I have bought and will continue to buy" in at least 1 of the 3 categories
- Potentials
  = those who answered "I haven't bought but am open to buying" to at least 1 of the 3 categories and who are not currently buyers
- Non-buyers
  = those who are not buyers nor potentials, and reject buying lower alcohol wine in the future

Methodology (2)

- The data for these 8 studies* was collected between November 2012 (France) and April 2013 (Germany, Switzerland, UK, US)
- Data was gathered via Wine Intelligence's Vinitrac® online survey platform with a minimum of 541 regular wine drinkers (Switzerland) and 609 wine drinkers (Sweden) per country. Each sample was constructed to be representative of regular wine drinkers (Canada, Switzerland, UK, USA) or wine drinkers (Denmark, France, Germany, Sweden) in that country
- Respondents were required to drink at least red, white or rosé wine - and to drink wine at least once per month <u>only</u> for countries where regular wine drinkers were interviewed (Canada, Switzerland, UK, USA)
- The surveys are quota-based to represent regular wine drinkers / wine drinkers in each market

*Canada, Denmark, France, Germany, Sweden, Switzerland, UK, USA

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