Report Brochure

LOWER ALCOHOL WINES

A MULTI-MARKET PERSPECTIVE

JANUARY 2016

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3

91 page PowerPoint report

*All prices exclusive of VAT, GST, or relevant local sale taxes at the current rate

Contents

* Tracking not available for this market

Excerpts from the introduction

‘Societies and governments are increasingly coming to regard those dealing in alcohol as bearing some responsibility for safeguarding the wellbeing of their consumers. We expect them to promote a culture of safe and moderate drinking.’

‘Thankfully, hand-in-hand with this shift in alcohol awareness is a general growth in interest on the part of consumers in seeking out healthier alternatives to traditional wines. This has opened up a window of opportunity for lower-alcohol, zero-alcohol and lower-calorie wines, where the wine industry can expand amidst a culture where alcohol is seen first and foremost as an “intoxicant”.’

‘Lack of product awareness, in fact, would seem to be the principal barrier to the success of lower alcohol wines across the eight markets. Yet despite this formidable obstacle, several markets seem every part as promising for them as upon our last investigation in 2014. These include the US, the world’s largest wine market, the UK, where over half of consumers are at least open to buying, and Germany, where health concerns support a flourishing lower-alcohol market.’

‘Canada is showing a remarkable growth in its numbers of buyers and potential buyers of lower alcohol wine since 2014 and seems to have the potential to become a lucrative market for lower-alcohol products.’

‘It is evident that some change is afoot in the lower alcohol wine industry and, with limited exceptions, that lower alcohol wines have a strong potential to grow in multiple markets.’

David Thompson
Project Executive
Wine Intelligence

Methodology

Classification of the 3 segments

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

Vinitrac® methodology

- The data for these 8 markets was collected in November 2012, April 2013, November 2013, March 2014, April 2014, April 2015 and October 2015.
- Data was gathered via Wine Intelligence's Vinitrac® online survey platform with a minimum of 997 regular wine drinkers per country. Each sample is representative of regular wine drinkers (except France and Belgium – all wine drinkers) in that country.
- Respondents were required to drink at least red, white or rosé wine - and to drink wine at least once per month (except France and Belgium where they were required to drink wine)
- The surveys were quota-based; the following slides shows the sample distributions in each country
- Tracking is not available for New Zealand as this market was not tested in 2014

How does Vinitrac® work?

1) Defining the right samples: how many wine drinkers are there in each market?

- Wine Intelligence, with the support of global research companies (e.g. TNS, YouGov), regularly runs calibration studies in each market among all adults in order to define demographic specifications of the wine consumers and the size of the market (i.e. penetration of wine consumption)

2) Running the online survey: Targeting the right consumers

- Invitations to participate in an online survey programmed by Wine Intelligence are then distributed to residents in each market
- Respondents are directed to a URL address, which provides access to the online survey
- Based on given criteria (e.g. age, beverage, frequency of wine consumption) respondents will either proceed or screen out of the survey
- Wine Intelligence monitors completed responses to build samples representative of the target markets' wine drinking population based on the most recent calibration study

3) Cleaning the data: Achieving a valid sample

- When a representative sample is logged, the survey is closed
- Wine Intelligence will then clean out all invalid data points (e.g. those who sped through the survey or gave inconsistent answers to selected questions) and weight the data in order to ensure representability

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