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The lower alcohol wine landscape

Consumer demand and wine trade promotion

Whereas in the early days of lower alcohol wine these products chiefly remained the domain of fairly niche health-conscious producers such as Weight Watchers, they are now becoming more widespread among mainstream brands.¹

Torres Natureo
This wine is an example of a big brand getting on board the lower alcohol movement. It is a de-alcoholised Muscat, with an extremely low ABV%, thus targeting a health-conscious crowd.² (0.5% ABV)

Brancotto Estate Flight
Making use of an earlier harvest, these wines are intended to be naturally lighter in alcohol and fuller in flavour.³ (9% ABV)

Rainrock Station Light Shiraz Road
Modelling itself as a dieting option as well as an alternative for those wanting to avoid the negative effects of alcohol, this low-alcohol, low-calorie wine caters to the masses by promoting healthier drinking more generally.⁴ (ABV 4.5%)

Diets are another health concern for consumers which often accompanies a desire for lower alcohol content...

In response to consumer demand several products are now available on the market with a focus on lower alcohol content.

...some wines are therefore attempting to address both lower calories and lower alcohol.

Source: 1. www.theguardian.com/uk/2013/feb/06/wine-0.5
2. www.theguardian.com/food/2013/feb/06/wine-0.5
3. www.theguardian.com/food/2013/feb/06/wine-0.5
4. www.theguardian.com/food/2013/feb/06/wine-0.5

Why are consumers buying lower alcohol wines

motivated by the taste of lower alcohol wine, driving it Belgian

I would not consider drinking lower alcohol wines.

Most of my friends are drinking it.

It gives me fewer headaches.

Fewer calories than other wines.

It's better for my health.

Price is lower than standard wine.

I'm on a diet.

I like to stay in control.

I will be drinking.

Source: Wine Intelligence, Vintrac* March, June, October 2013 (n=628) and March 2014, April 2014, June 2014, regular wine drinkers and wine drinkers

Why do consumers consider buying lower alcohol wines

Buyers 28%
Potential buyers 18%
Non-buyers 54%

Age

Age Group	Buyers	Potential buyers	Non-buyers
18-24	20%	15%	65%
25-34	25%	20%	55%
35-44	30%	25%	45%
45-54	35%	30%	35%
55-64	40%	35%	25%
65+	45%	40%	15%

Consumption Frequency

Frequency	Buyers	Potential buyers	Non-buyers
1-2 times/week	35%	30%	35%
3-4 times/week	40%	35%	30%
5-6 times/week	45%	40%	25%
7-8 times/week	50%	45%	20%
9-10 times/week	55%	50%	15%

Involvement

Involvement Level	Buyers	Potential buyers	Non-buyers
Highly involved	30%	25%	45%
Medium involved	40%	35%	35%
Lowly involved	50%	40%	20%

© All sample data
* Statistically significantly higher than all sample at a 95% confidence level
* Statistically significantly lower than all sample at a 95% confidence level
Source: Wine Intelligence, Vintrac* Belgium, Jan 2013 (n=1000)

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

Contents



▪ Introduction	p.3
▪ Management summary	p. 6
▪ The lower alcohol wine landscape	p. 14
▪ Consumer estimation of alcohol content in wine	p. 25
▪ Current and potential usage of lower alcohol wine	p. 32
▪ Lower alcohol wine purchasing behaviour	p. 45
▪ Lower alcohol wine buyer groups profiling by market	p. 52
Belgium	p. 52
Canada	p. 56
France	p. 60
Germany	p. 64
Netherlands	p. 68
New Zealand*	p. 72
UK	p. 76
USA	p. 80
▪ Methodology	p. 84

* Tracking not available for this market

‘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



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

- 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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