

Consumer Perspectives on Organic/Sustainable: an Update



Full Glass Research



“Wine Opinions”

December 2, 2009

In the past three months, from which of these categories have you purchased organic or sustainably-produced products?

- ❖ Beer - 14%
- ❖ Tea or Coffee - 48%
- ❖ Fresh fruits or vegetables - 93%
- ❖ Wine - 47%

What is “Sustainable”?

answer options	2007 % Agreeing		2009 % Agreeing
Protection of natural resources	61%	→	54%
Minimize use of synthetic pesticides/fertilizer	54%	→	44%
Use only renewable resources	50%		49%
Economically self-sustaining	46%	→	34%
Minimized CO2 or greenhouse gas output	43%	→	30%
Greater benefits for workers and local residents	28%		25%
Made from organic grapes	na		30%
Certification by an independent or government agency	24%		28%
Produced and sold locally	24%		17%
Produced biodynamically	14%	→	22%

What is “Organic”?

answer options	2009 % Agreeing
Protection of natural resources	26%
Minimized CO2 or greenhouse gas output	17%
Biodynamic methods	17%
No use of synthetic pesticides/fertilizers	75%
Certification by an independent or government agency	41%
No use of Sulfur Dioxide	24%
Made from organic grapes	65%
No Genetically modified organisms or grapes permitted	44%

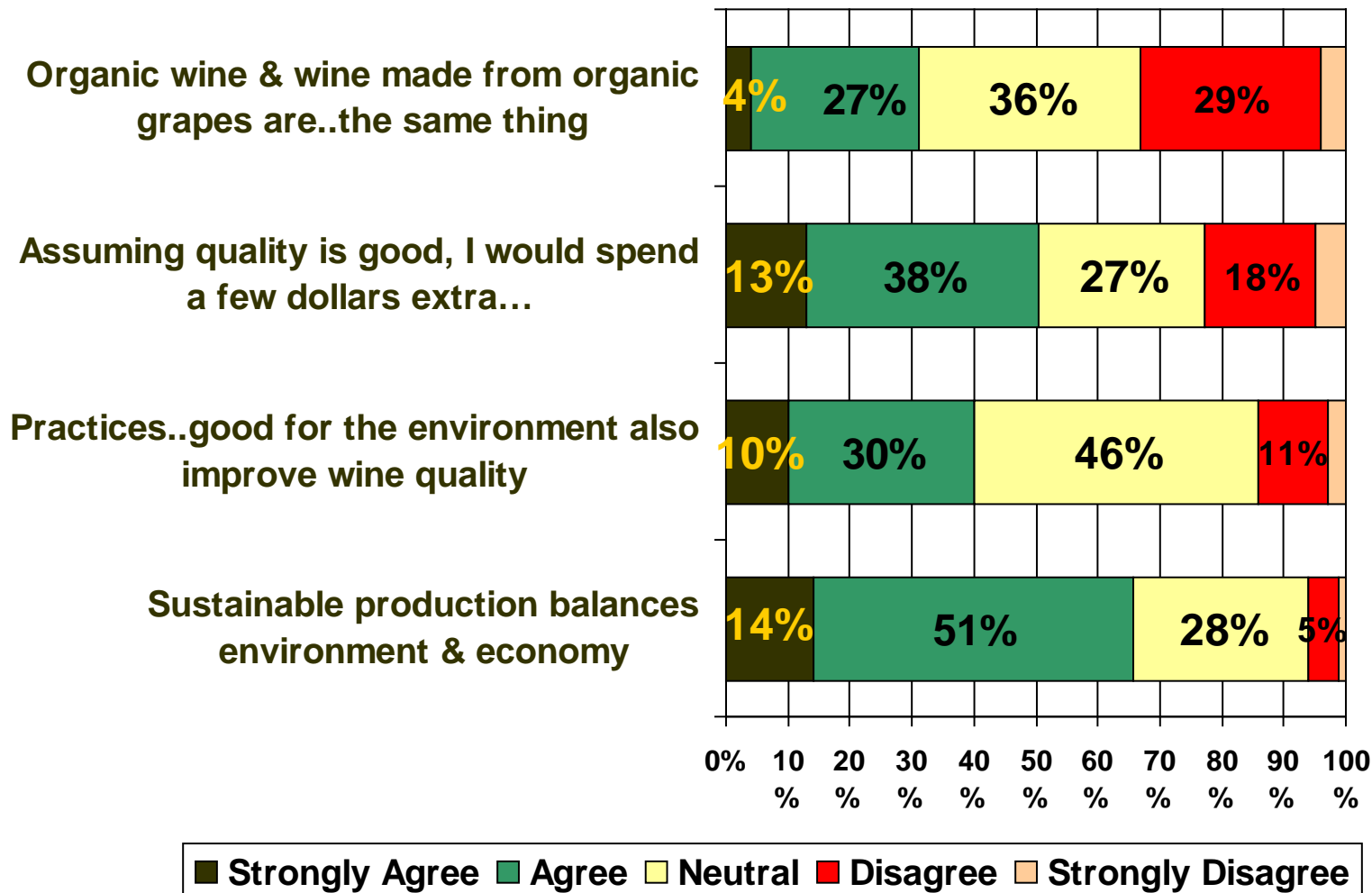
Reasons for Purchasing Organic or Sustainable

Reason	Response % 2007*	Response % 2009
Sustainable products are better for the earth/environment.	49%	59%
Sustainable products are better for me and my family.	47%	47%
I'm influencing society and the economy by purchasing sustainable products	22%	33%
Sustainable wines taste better	17%	14%
I am making a statement about my values when purchasing sustainable products.	16%	30%
It's my way of offsetting things that I do that are bad for the environment.	14%	19%
Other	9%	21%

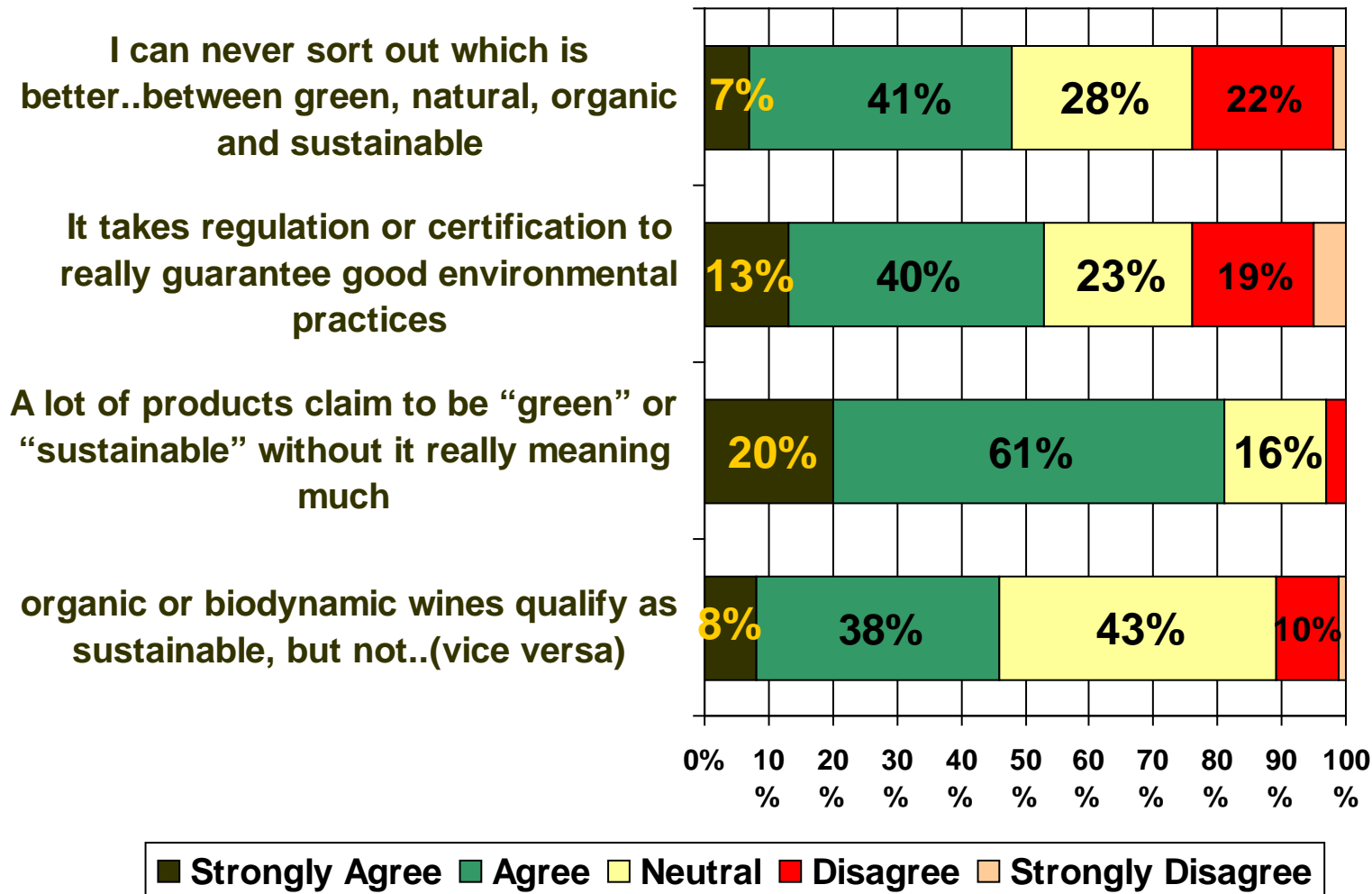
Why NOT Purchase Organic /Sustainable?

Reason	Response % 2007*	Response % 2009
I rarely or never see sustainable wines in the market.	49%	38% (41%)
I don't care whether wines are produced sustainably or organically.	18%	33%
All or almost all wine is produced in this manner, so I don't need to choose sustainable or organic wines.	9%	6%
I don't buy enough wine to bother looking for sustainable wines.	7%	4%
Sustainably produced wine doesn't taste as good as conventional wine.	3%	5%
Sustainably produced wine is too expensive.	3%	4%
The process of winemaking removes unhealthy chemicals.	3%	1%

Agreement with Statements on Organic & Sustainable Wines



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Green Perceptions for Select Brands

Brand/Winery	Use only Organic Grapes	Use Sustainably farmed grapes	Neither of those methods	Don't Know
Fetzer	3%	8%	18%	70%
Bonterra	14%	6%	3%	77%
Frog's Leap	5%	10%	7%	78%
Benziger	5%	9%	10%	76%
Red Truck	2%	6%	13%	80%
Rodney Strong	1%	6%	12%	81%
King Estate	2%	8%	5%	86%
Barefoot	2%	6%	19%	73%

Green Perceptions: Don't Know Removed

Brand/Winery	Use only Organic Grapes	Use Sustainably farmed grapes	Neither of those methods
Fetzer	11%	28%	61%
Bonterra	58%	27%	15%
Frog's Leap	21%	46%	33%
Benziger	20%	39%	42%
Red Truck	11%	28%	61%
Rodney Strong	7%	33%	60%
King Estate	13%	54%	33%
Barefoot	8%	24%	68%

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