

# Consumer & Trade Opinions on “Green” Wines



**Full Glass Research**



“Wine **Opinions**”

# Wine is Seen as Lower in Environmental Impact Than Other Products

Beverage	% Rating Impact Low (1)	% Rating Impact High (5)	Avg. Rating
Bottled water (still)	15%	20%	3.16
Vodka	17%	2%	2.62
Coffee	14%	5%	2.83
Orange Juice	18%	3%	2.64
<b>Wine</b>	<b>24%</b>	<b>3%</b>	<b>2.44</b>
Milk	17%	9%	2.93
Beer	14%	2%	2.70

Source: Full Glass Research 2007

# Demographic & Winedrinking Traits vs. “Green” Consumption

- ❖ Generally speaking, females are more concerned with “green” issues in food and beverages.
- ❖ California respondents placed more emphasis on origin and quality reputation, less on price. This may just be due to a higher proportion of High End and High Frequency buyers in CA.
- ❖ As you might expect, High Frequency and High End drinkers give more importance to origin and quality reputation. Both give somewhat higher importance to “green” issues BUT only High End are enough to be statistically significant.

Source: Full Glass Research 2007

# Production Information Importance (influence on food & beverage purchases)

1=Very Important; 2=Important; 3=Undecided; 4=Not important

Information	Average (total sample)	Average (those who purchased sustainable wine)
Country or region of origin	1.9	1.8
Reputation for quality	1.6	1.5
Grown with reduced inputs	2.2	1.9
Grown using less fuel/emissions	2.8	2.5
Organically grown	2.5	2.2
Not genetically modified	2.4	2.2
Very competitive prices	1.6	1.6

Source: Full Glass Research 2007

# What is “Sustainable”?

answer options	% Agreeing
Protection of natural resources	61%
Minimize use of synthetic pesticides/fertilizer	54%
Use only renewable resources	50%
Economically self-sustaining	46%
Minimized CO2 or greenhouse gas output	43%
Greater benefits for workers and local residents	28%
Organically produced	28%
Certification by an independent or government agency	24%
Produced and sold locally	24%
Produced biodynamically	14%
Other (please specify)	4%

# Primary Reason for Purchasing Sustainable Products

<i>Base: those who purchased category</i>	Healthier for me or my family	Better for the planet or environment	To make a personal or political statement
Produce, meat or dairy products	77%	23%	1%
Cleaning or bathroom products	37%	61%	1%
Canned or bottled foods/beverages	57%	41%	2%

Source: Full Glass Research 2007

# Reasons for Purchasing Sustainable Wines

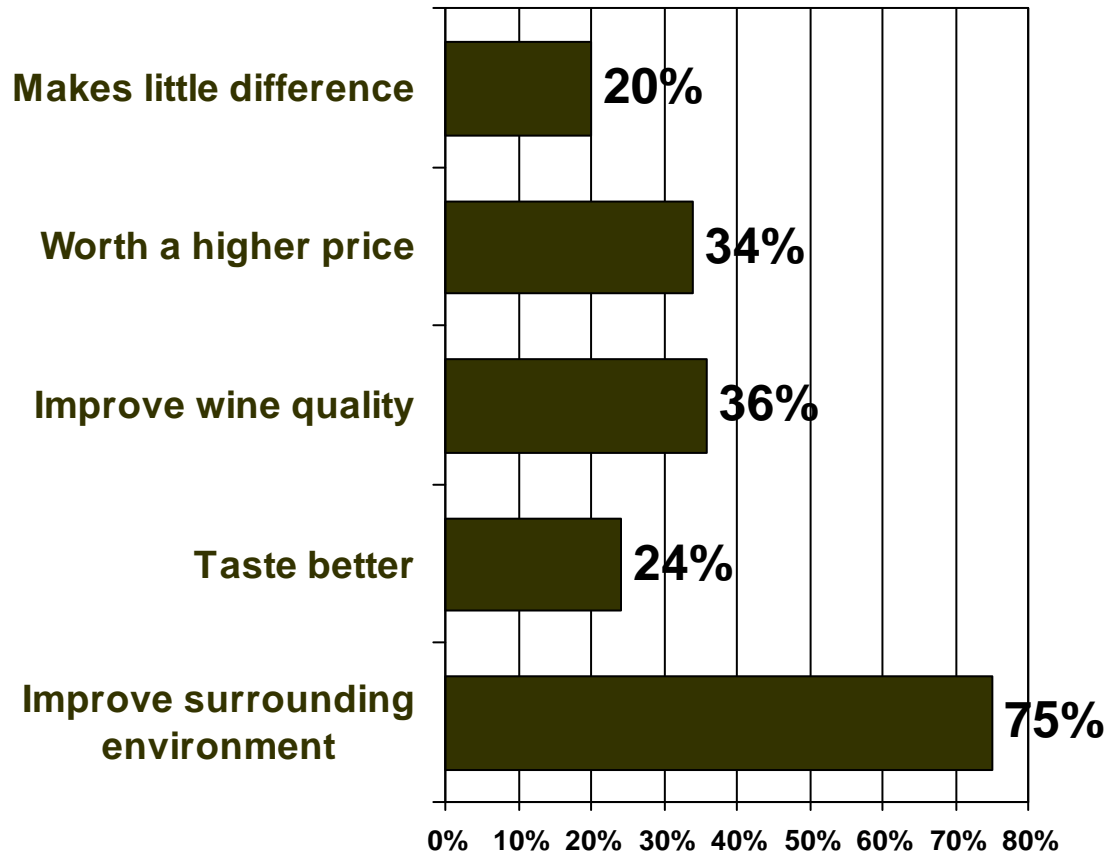
Reason	Response Percent
I like supporting producers of sustainable products.	55%
Sustainable products are better for the earth/environment.	49%
Sustainable products are better for me and my family.	36%
I'm influencing society and the economy by purchasing sustainable products	22%
Sustainable wines taste better	17%
I am making a statement about my values when purchasing sustainable products.	16%
It's my way of offsetting things that I do that are bad for the environment.	14%
Other	9%

Source: Wine Opinions 2007

# Why NOT Buy Sustainable Wine?

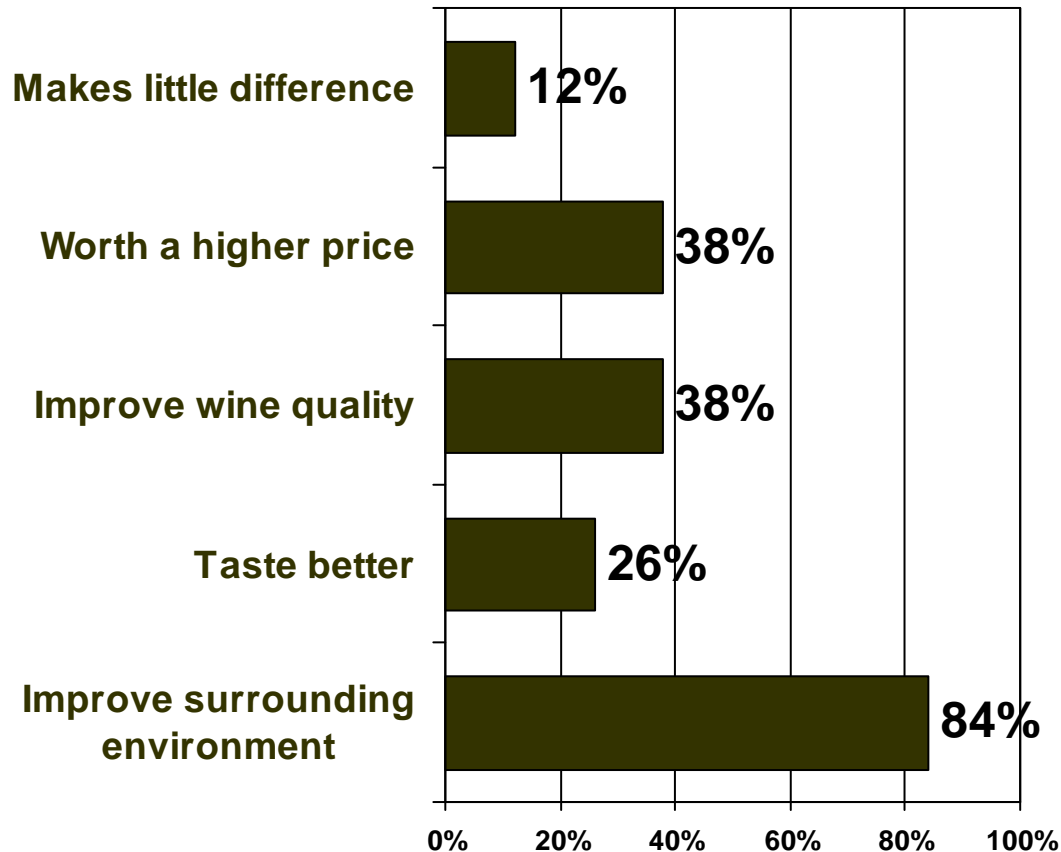
Reasons for not purchasing	Response Percent
I rarely or never see sustainable wines in the market.	49%
I don't care whether wines are produced sustainably.	18%
All or almost all wine is produced sustainably, so I don't need to choose sustainable wines.	9%
I don't buy enough wine to bother looking for sustainable wines.	7%
Sustainably produced wine doesn't taste as good as conventional wine.	3%
Sustainably produced wine is too expensive.	3%
The process of winemaking removes unhealthy chemicals.	3%
Wine cannot be sustainably produced.	0%

# Impact of Organic/Sustainable/Natural Growing Methods - Consumers



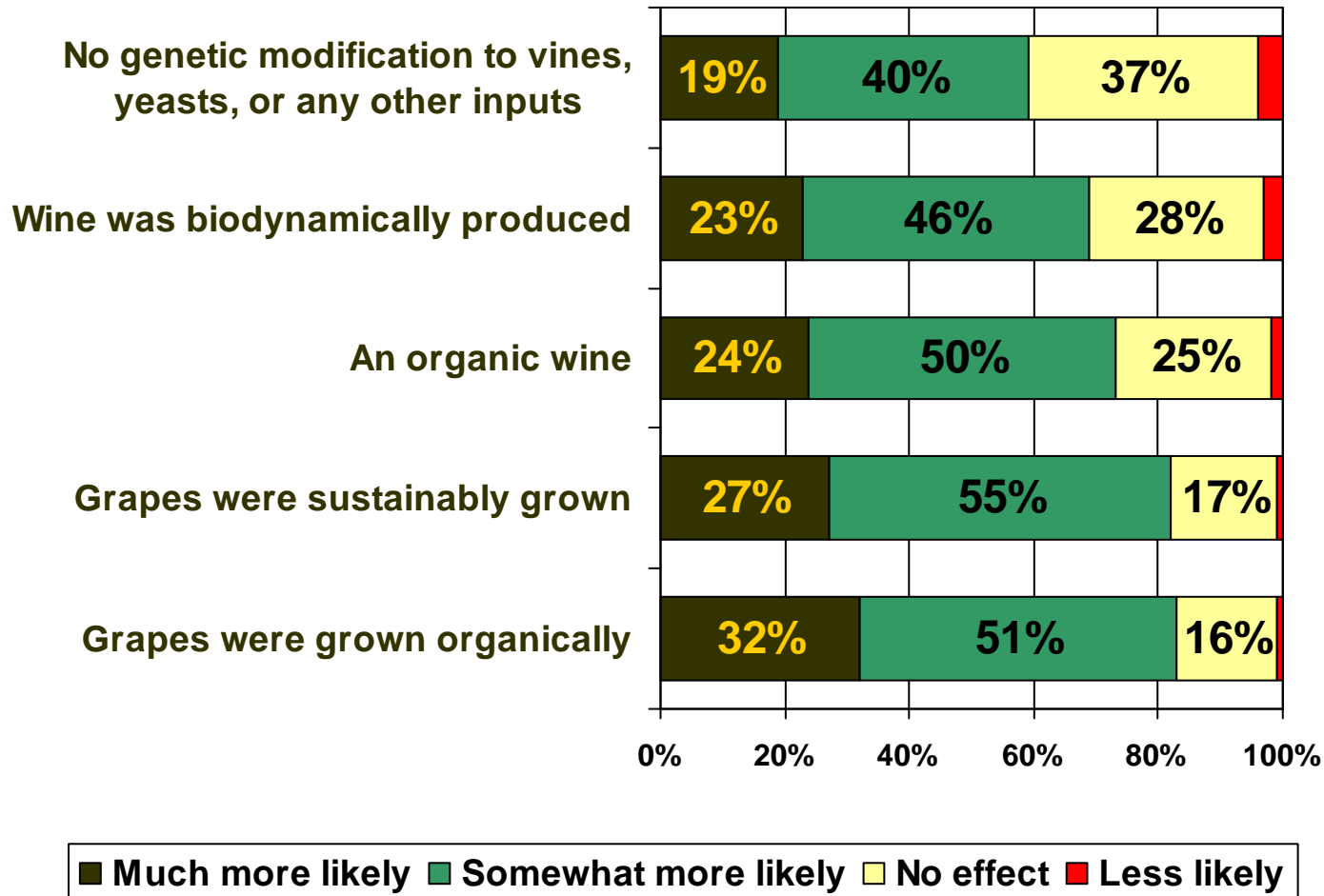
Source: Wine Opinions 2007

# Impact of Organic/Sustainable/Natural Growing Methods - Trade

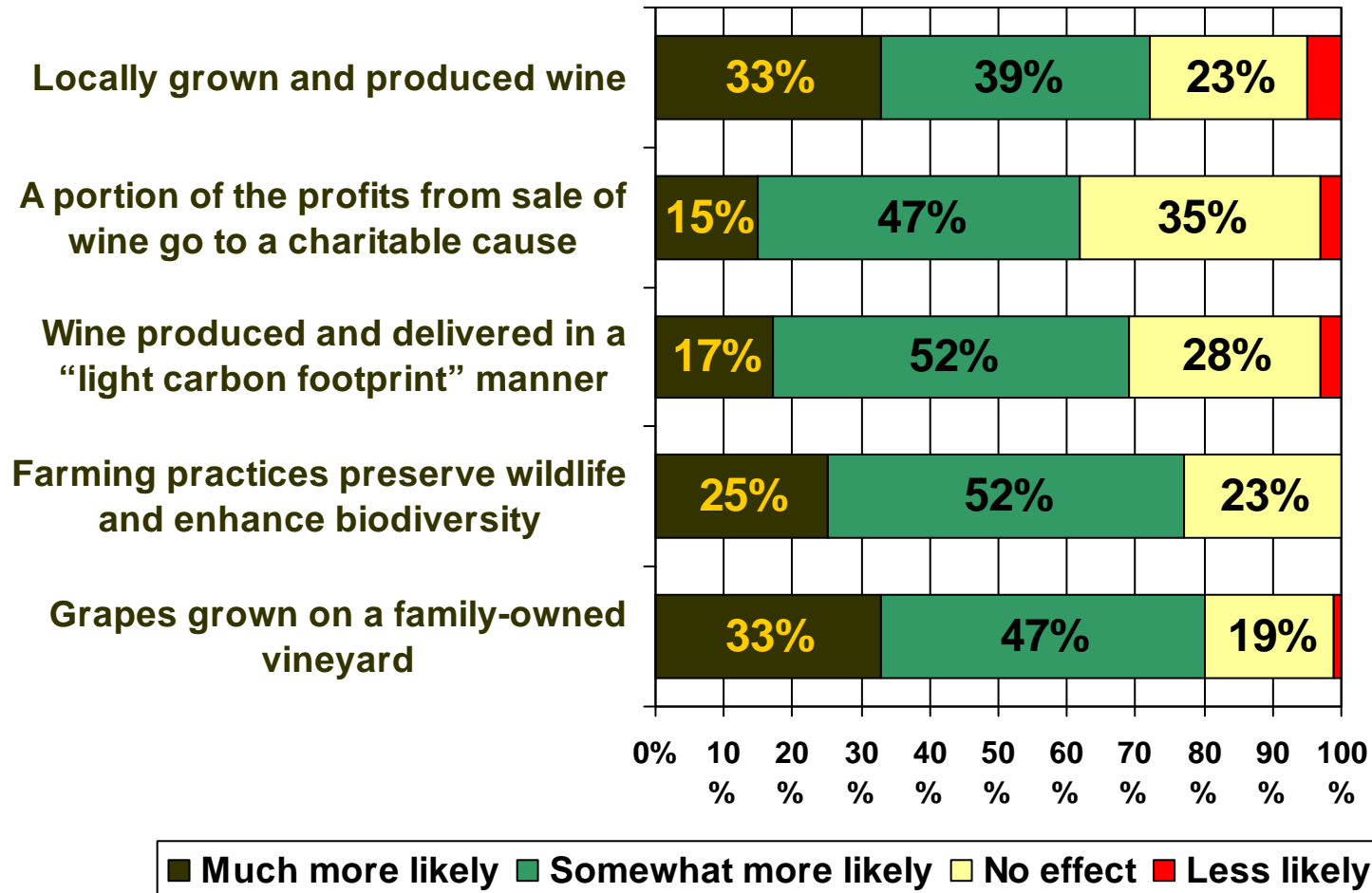


Source: Wine Opinions 2007

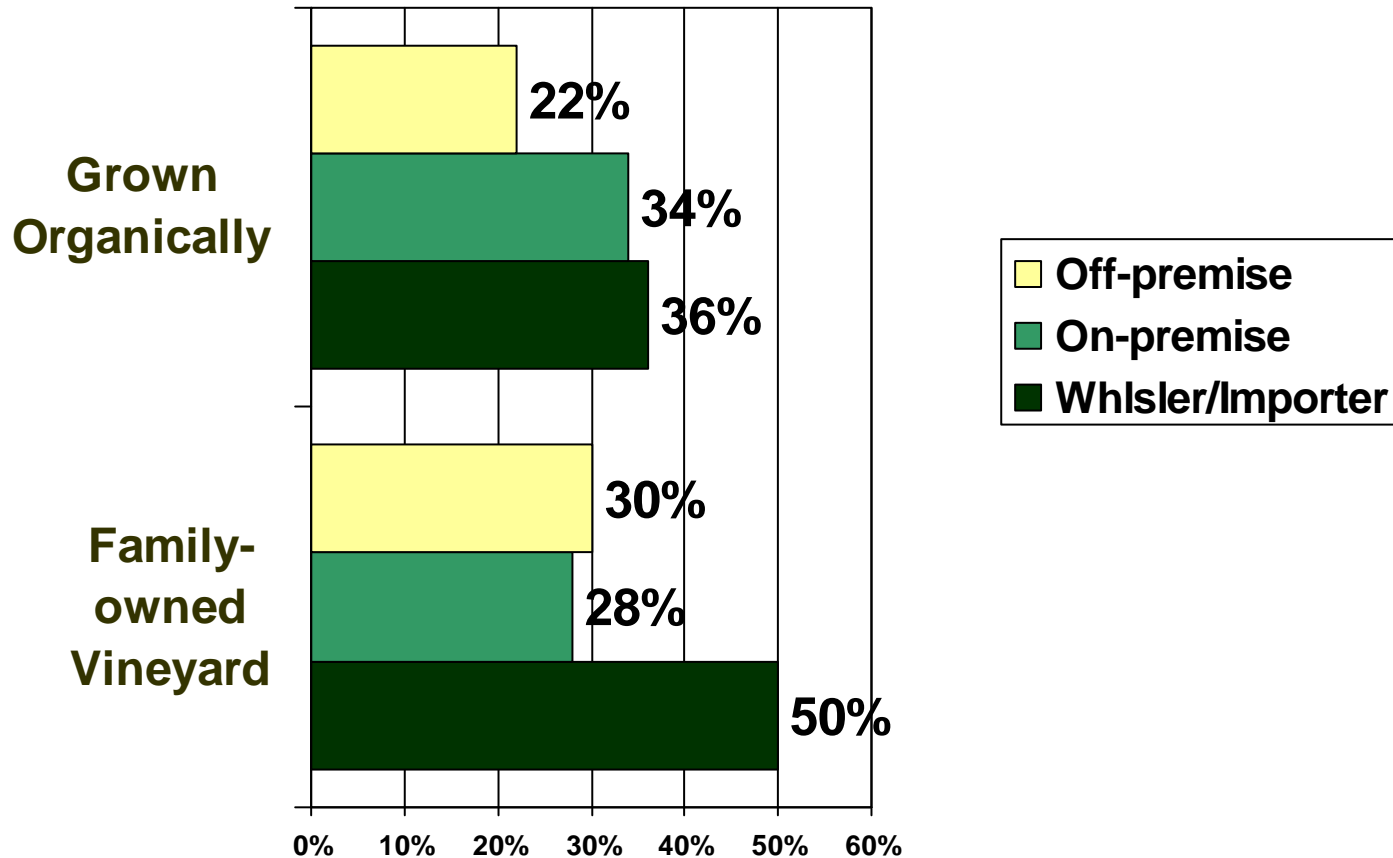
# Trade: Impact of Growing/Winemaking Process on Likelihood of Carrying & Selling a Wine



# Trade: Impact of Growing/Winemaking Process on Likelihood of Carrying & Selling a Wine (2)



# Trade: Winery Aspects that make it “Much More Likely” to Carry & Sell their Wine



Source: Wine Opinions 2008

# Trade: Biggest Change or New Development in 2009...(open-ended)

Change/Development	% Respondents
The economy (effect on spending, etc.)	34%
"Turning green" (organics, packaging, sustainable, consumer demand for, global warming, etc.)	19%
Value wines (due to economy, supply, consumer savvy, etc)	18%
Less spending on wine by consumers	9%
Increase in sales of low-priced wines (under \$10, sometimes much lower)	9%
Packaging (screwcaps, lighter weight, greener, box wines)	7%
Corporate issues - consolidation, bankruptcies, distributor consolidation, etc.)	6%
Drop in sales of High End wines	5%

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