

**BEVERAGE PREFERENCES,
ATTITUDES, & BEHAVIOR
OF
'SWEET' VS. 'TOLERANT'
WINE CONSUMERS**

TIM HANNI MW
VIRGINIA UTERMOHLEN MD

RESULTS OF AN
ON-LINE CONSUMER SURVEY
sponsored by the
CONSUMER WINE AWARDS at
LODI
with
LODI TOKAY ROTARY
&
DIVERSITY WINE AWARDS LLC





Our mission:
to explore and introduce
new ways
to understand, embrace,
engage,
and
cultivate
all wine consumers,
in order to create
a more sustainable
and healthy
wine industry.

ABOUT THE SURVEY

This report offers a brief overview of a survey of the preferences, attitudes, and behaviors of two groups of wine consumers

~ SWEET and TOLERANT ~
with wine stylistic preferences at the
extreme ends of the spectrum of wine styles.

The data presented in this report come from an on-line survey conducted in conjunction with the **CONSUMER WINE AWARDS at LODI**.

Filters were created to cluster respondents who preferred sweet wine types versus those with a preference for more intensely styled red wines—the tolerants.

This report contains comparative charts demonstrating significant differences between 'Sweet' and Tolerant' groups in:

- Gender
- Age
- Preferences for wine by variety/type
- Wine selection attitudes and confidence
Adult beverage consumption frequencies
- Desirable characteristics (flavor descriptors)
- Adult beverage preferences by occasion (home, fine dining, social/bar)
- Beer style and coffee preferences

For more information or to order the full report, contact: Tim Hanni, tim@timhanni.com or call 707-337-0327

SURVEY STATISTICS

Collection period:
December 2009 — March, 2010

Total started survey: 1,597

Survey response total for this analysis: 1,485

'Sweet' respondents: 324

'Tolerant' respondents: 341





ABOUT THE CONSUMER WINE AWARDS AT LODI

The Consumer Wine Awards at Lodi (CWAL), sponsored by the Lodi Tokay Rotary and the Diversity Wine Awards LLC, recognizes and celebrates the fact that every person has unique physiological and sensory differences that profoundly affect wine and food preferences.

The judges assessing each category of wine were the very consumers who are most inclined to buy and enjoy the wines of that category.

Consumers interested in becoming Evaluators for the CWAL were required to complete the survey analyzed in this report.

We received requests from over 1000 of people (from those who completed the survey) to become Consumer Wine Evaluators — in the end, 90 were selected for the event.

You can learn more about the CWAL evaluation methodology and view the 2010 results at:

www.consumerwineawards.com

ABOUT THE AUTHORS

TIM HANNI MW

Tim Hanni has worked in the wine industry for over 35 years and is one of the first two resident Americans to successfully complete the examination and earn the credential Master of Wine. He is also a professionally trained chef and a Certified Wine Educator accredited by the Society of Wine Educators.

Hanni has been involved with wine and food related businesses, education and consumer research. Hanni is renowned for his unique perspective on food and wine combined with his work on developing a better means for understanding of consumer wine preferences, attitudes and behaviors.

He has lectured in over 27 countries around the world on the topics of flavor balancing, sensory sciences, wine and culinary history.

VIRGINIA UTERMÖHLEN MD

Virginia Utermohlen grew up in a multi-lingual household, where the appreciation of good wine and good food was a given. After passing her French Baccalaureate exam with honors (one of the potential questions was “*Describe the wines and cheeses of France!*”) she turned her attention to the sciences, and completed a medical degree and board certification in pediatrics.

The mysteries of flavor perception were, however, never far from her thoughts. Her position in the Division of Nutritional Sciences at Cornell University has given her the opportunity to explore the science behind individual differences in flavor sensitivity, and their consequences for food choice, eating attitudes and behavior, and engagement in visual experience (of wine labels, for example).

A FEW WORDS ABOUT TASTE (AND SMELL) SENSITIVITY AND WHY DIFFERENCES IN SENSITIVITY MATTER

What is taste?

Strictly speaking, taste is made up of the sensations coming from the mouth, and smell those from the nose, but our brains assign both taste and smell to the mouth. Therefore we commonly call the result “taste,” though “flavor” may be the more correct term.

What is taste sensitivity?

Taste sensitivity refers to the intensity with which you perceive tastes and flavors.

We differ considerably in what we each can taste and smell, and in how intense different tastes and smells are to us. People with high taste sensitivity experience tastes, and usually smells, too, as being very strong. They are also able to distinguish individual flavors in a mixture very well.

Is one taste sensitivity level better than another?

No! Greater (or lesser) sensory sensitivity does not make a person more expert or capable—just different.

Does taste sensitivity influence wine choice?

Yes!

Why does taste sensitivity influence wine choice?

The nerves that bring sensations from the nose and the mouth to our brain are closely linked to our emotional centers, our memory centers, and our centers for evaluation, judgment, and decision-making. Our taste sensitivity depends on the interactions of the taste and smell nerves with these centers in the brain.

Consequently our experience of taste—and therefore our wine preferences—are affected by the strength of the taste signals coming from the mouth and smell signals from the nose, and also by life experiences, aspirations, family, culture, learning/education, peer dynamics, just to name a few important influences.

All of these influences can contribute to shifts in preferences, attitudes and behaviors, but the physiological starting point is your fundamental taste sensitivity.

A common misconception is that “one’s palate matures and becomes more sophisticated over time”. The reality is that little children are generally *physiologically* more sensitive than adults, and that taste (and smell) sensitivity decreases with time, more sharply in some people than in others, so that by the end of adolescence we reach a plateau. The level of this plateau varies from person to person, and can also drop over time, but normally at a very slow pace.

As we grow older, we accumulate our psychological experiences—these in turn modulate our experience of the taste of wine. However, their effect carries by our taste sensitivity.

Does this mean that wine professionals should expand their definition of high aspiration wine?

Absolutely! Because each level of taste sensitivity brings with it a different palate—and with each different palate a fresh gamut of possibilities for the appreciation of excellence in wine.



THE TAKE-HOME MESSAGES

THE ‘SWEET’ CONSUMER

There’s a new market opportunity for wine out there: primarily female—but with a significant percentage of males as well—young, adventurous, and willing to try new wines—on their own terms. They are put off by the emphasis on dry wines, all the jargon surrounding wine-speak, and easily embarrassed when confronted by wine authority.

Trying to move them to dry wines on the theory that dry wines are inherently better or more appropriate with food will simply backfire.

You will have to engage them and build up their confidence in their wine preferences, if you want to lure them away from cocktails and light beer, and towards wine.

You will have to help them figure out how to pair wines with food in a new, friendly, and free-form way. They’re not sure how to do it and would love to learn—but your advice needs to be personalized to meet their expectations, and not simply dogma.

Preferred wine types include sangria, fruit wines, white zinfandel, and Riesling—especially Riesling—and sparkling wines. You must take care to get the right product to the Sweet consumer: sweet Riesling and Moscato in the 2-5% residual range are very desirable, not the dry, less fruity examples.

Among the reds, the best bets are Shiraz/Syrah, zinfandel, and pinot noir, but they aren’t liked as much as the whites—low alcohol with very little bitterness or astringency is mandatory, whether the wine is red or white. Pinot can be problematic for these Sweet consumers due to bitter phenolics commonly associated with this variety.

THE ‘TOLERANT’ CONSUMER

By contrast, if you have big red wines, then the Tolerant consumer will love them.

Who are the Tolerants? More likely to be male, a little older, and much more confident in choosing wine and in pairing wine with foods—maybe a bit cocky about wine, all told. They like jargon and they like authority.

They look for dry wines, complex wines, balanced wines and full-bodied ones, and will order wine even in a bar or non-dining social situation—in fact they drink wine almost every day. They tend to think of themselves as connoisseurs of wine.

Why do we call them Tolerants, then? Because they are physiologically predisposed to *tolerate* the bitterness and astringency of intense red wines and are relatively impervious to the burning sensation caused by wines with high alcohol content. In fact, high alcohol often tastes “sweet” to the Tolerant group.

Tolerants choose a very narrow range of wine types. They go primarily for Cabernet Sauvignon and Cabernet Sauvignon based blends.

Interestingly, they share a liking for Pinto Noir and Shiraz/Syrah with the lovers of sweet wines—so if you offer rich yet very smooth examples of these varieties, you can catch both audiences.

Remember, coffee companies struck gold with the ‘Sweet’ consumer: sweetened and flavored coffee often sells for 3 to 4 times the price of a regular cup of coffee.

THE NEW MARKET OPPORTUNITY:

**UPSCALE PRODUCTS FOR ‘SWEET’ CONSUMERS,
WHO ARE TASTE SENSITIVE AND PREFER SWEETER WINES**

AFFINITY GROUPS

A brief overview of traits, preferences and opportunities of the four consumer groups

SWEET

Highest level of taste sensitivity ~ needs sweetness to offset other tastes

Prefer sweet wines by declaration

Preferred wines: Riesling, White Zinfandel, Sangria, fruit flavored wines, Chardonnay

Language: Sweet, smooth, fruity

Sell opportunities: Moscato, sweet Riesling and other sweet wines

Avoid: overplaying wine-food pairing, selling dry wines

HYPER-SENSITIVE

Very high taste sensitivity

Primarily prefer dry and slightly off-dry wines by declaration

Preferred wines: Pinot Grigio, dry Riesling, light reds

Language: dry, light, fruity

Sell opportunities: dry, less intense whites or rosés and very smooth, lighter intensity reds.

SENSITIVE

Moderate taste sensitivity

Wine preferences run a complete spectrum of styles and flavors

Language: dry, balanced, fruity

Sell opportunities: very open to exploring, have very wide range of flavor acceptability

TOLERANT

Least likely to have problems with taste sensitivity ~ the stronger the better

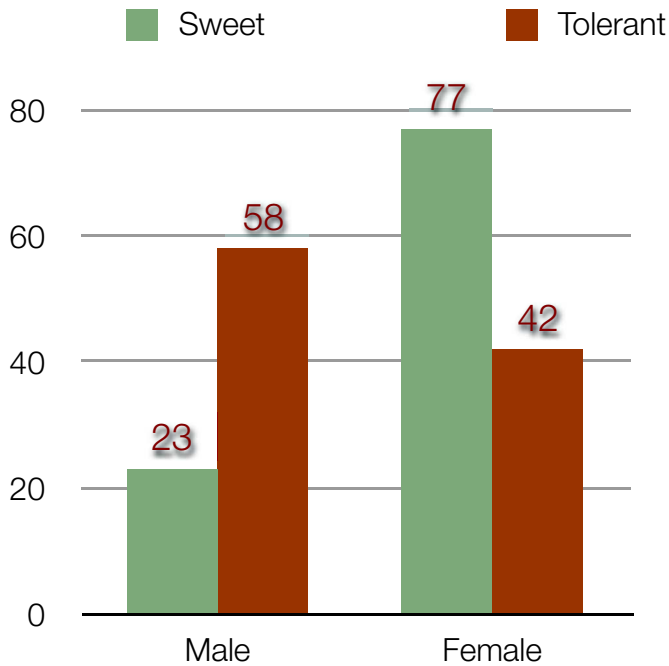
Prefer big red wines

Language: point ratings, complex, bold, intense

Sell opportunities: big reds

We have identified
four primary consumer groups,
who span the spectrum of
wine style preferences,
from light & sweet
to intense & red.

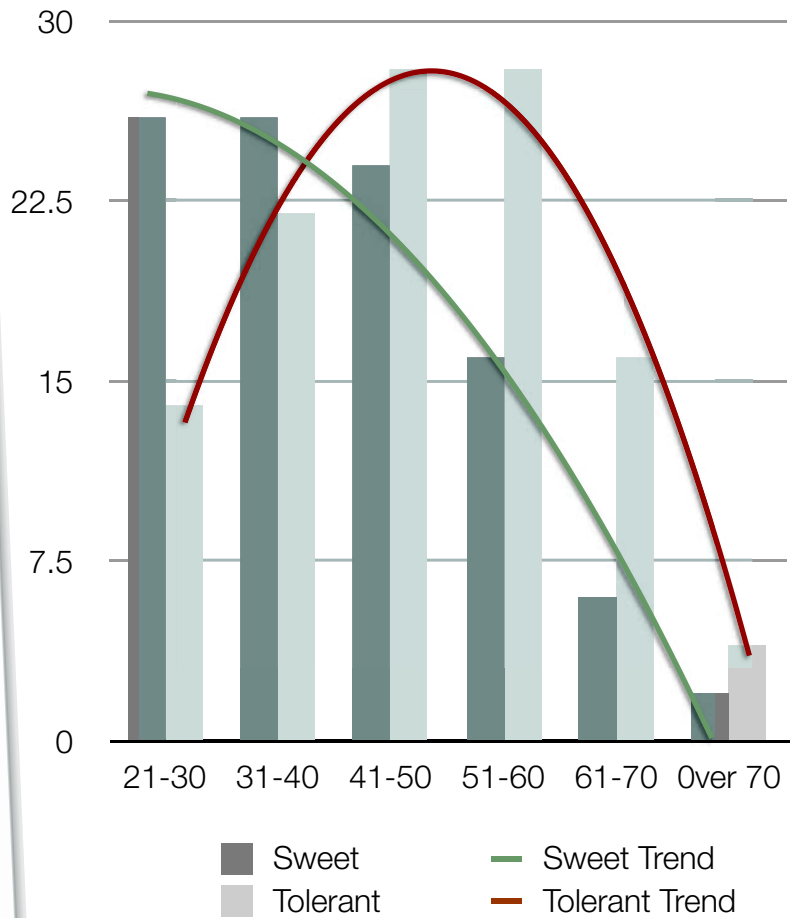




Percent of males and females in each taste group

GENDER AND AGE DISTRIBUTION 'SWEET' VERSUS 'TOLERANT'

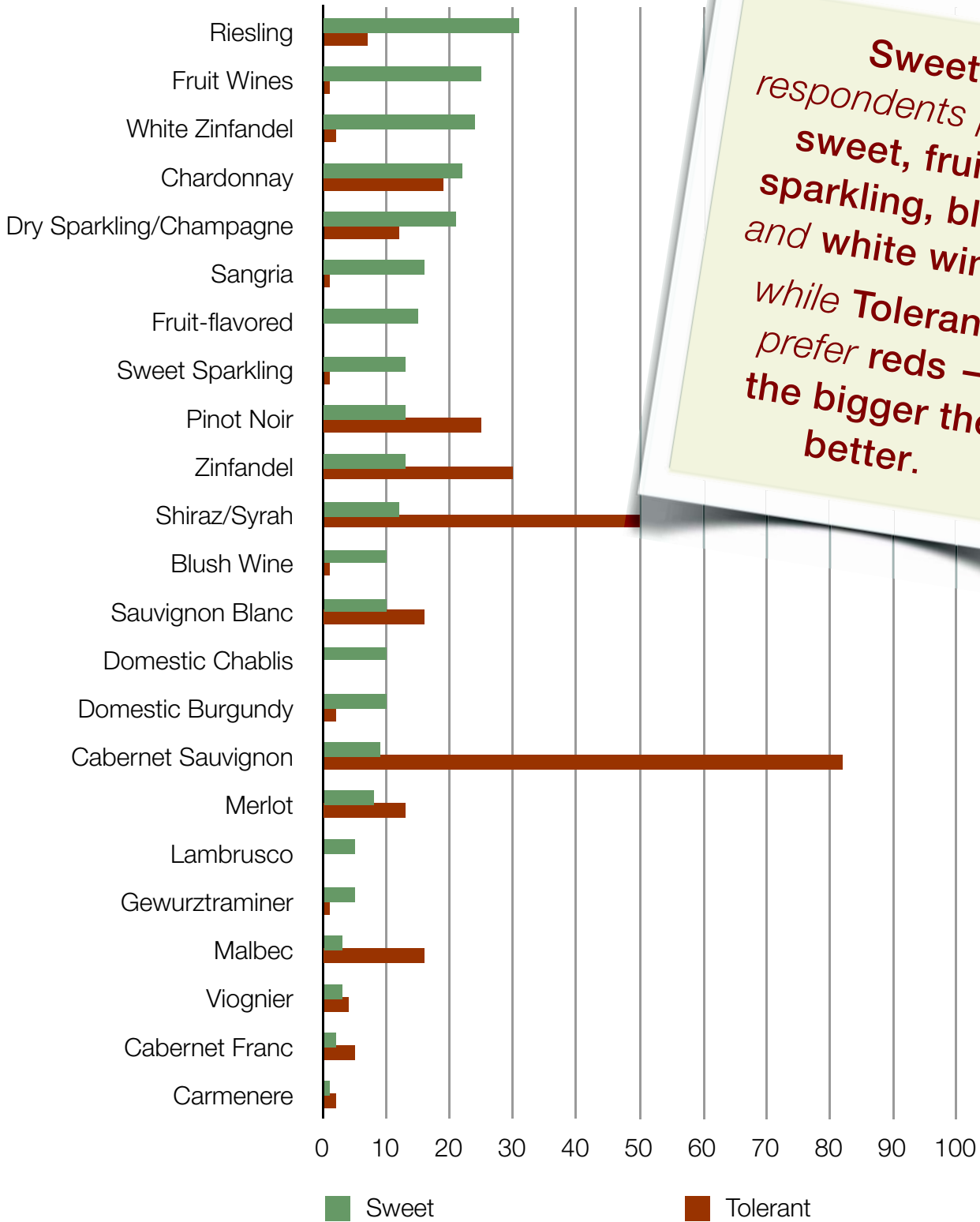
People who like **sweeter** wines are more likely to be **female** and **younger**
 ~
 People who are **tolerant** are more likely to be **male** and **older**



Percent of participants in each age group, with trend lines for each taste group

WINE PREFERENCES

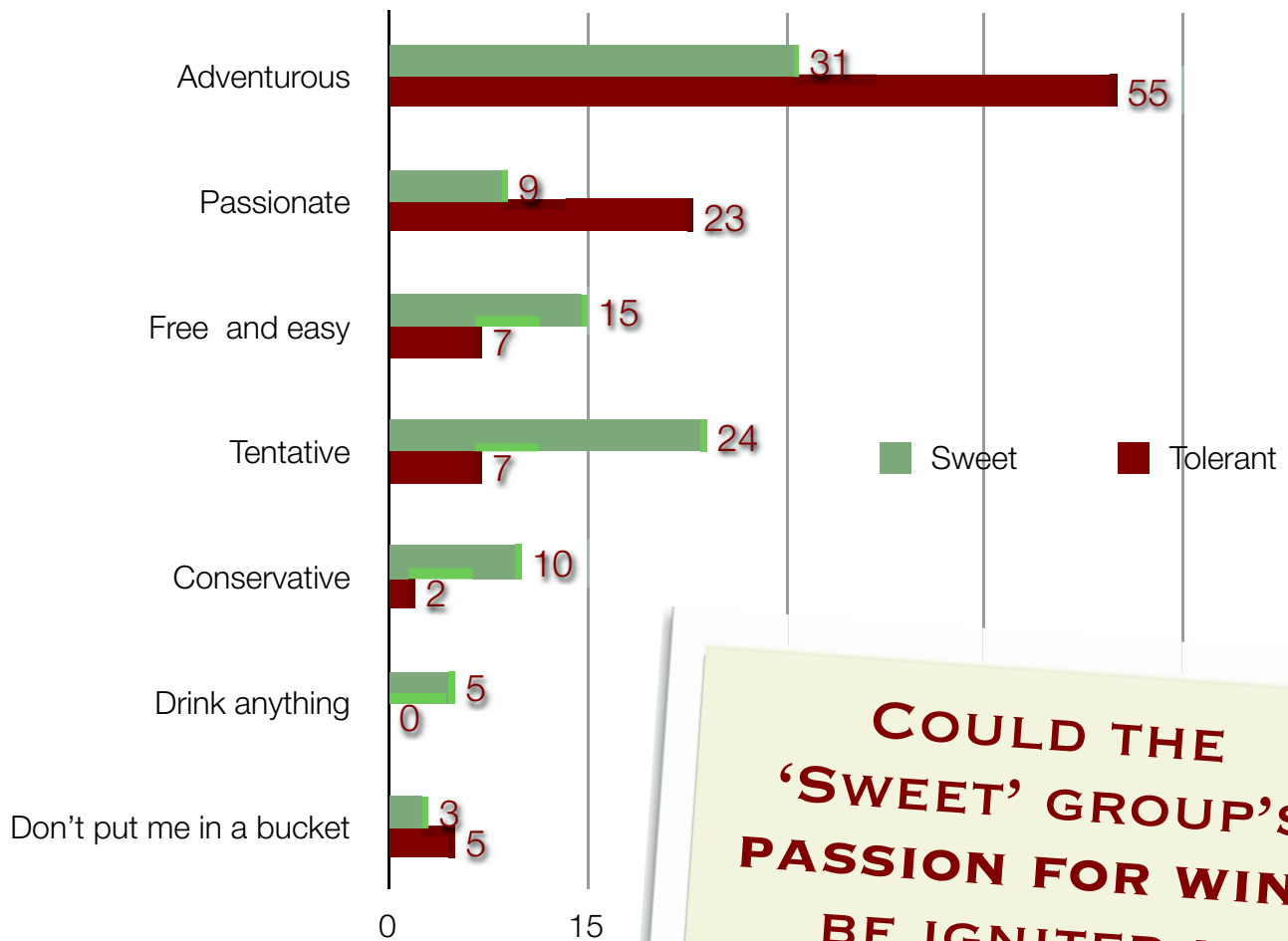
Respondents selected up to 3 wine types that they frequently drink. The values below represent the times (as percent of total responses) that each wine was chosen by each group.



Sweet respondents prefer sweet, fruity, sparkling, blush and white wines, while **Tolerants** prefer reds — the bigger the better.

Members of the **'Sweet'** group were **significantly more likely** to select **"tentative"** or **"conservative"** and somewhat **less likely** to select **"adventurous"** to describe their attitude towards selecting wines. Importantly, **far fewer members of the 'Sweet' group were passionate about selecting wine.**

Percent of each group with each answer to:
Which of the following best describes your attitude toward selecting wines?



ATTITUDES TOWARDS WINE

COULD THE 'SWEET' GROUP'S PASSION FOR WINE BE IGNITED IF SWEETER WINES WERE MORE ACCEPTABLE AND MORE AVAILABLE?

CONFIDENCE CHOOSING WINE

COULD THE 'SWEET' GROUP BECOME MORE COMFORTABLE WITH WINES IF SWEETER WINES WERE MORE ACCEPTABLE AND MORE AVAILABLE?

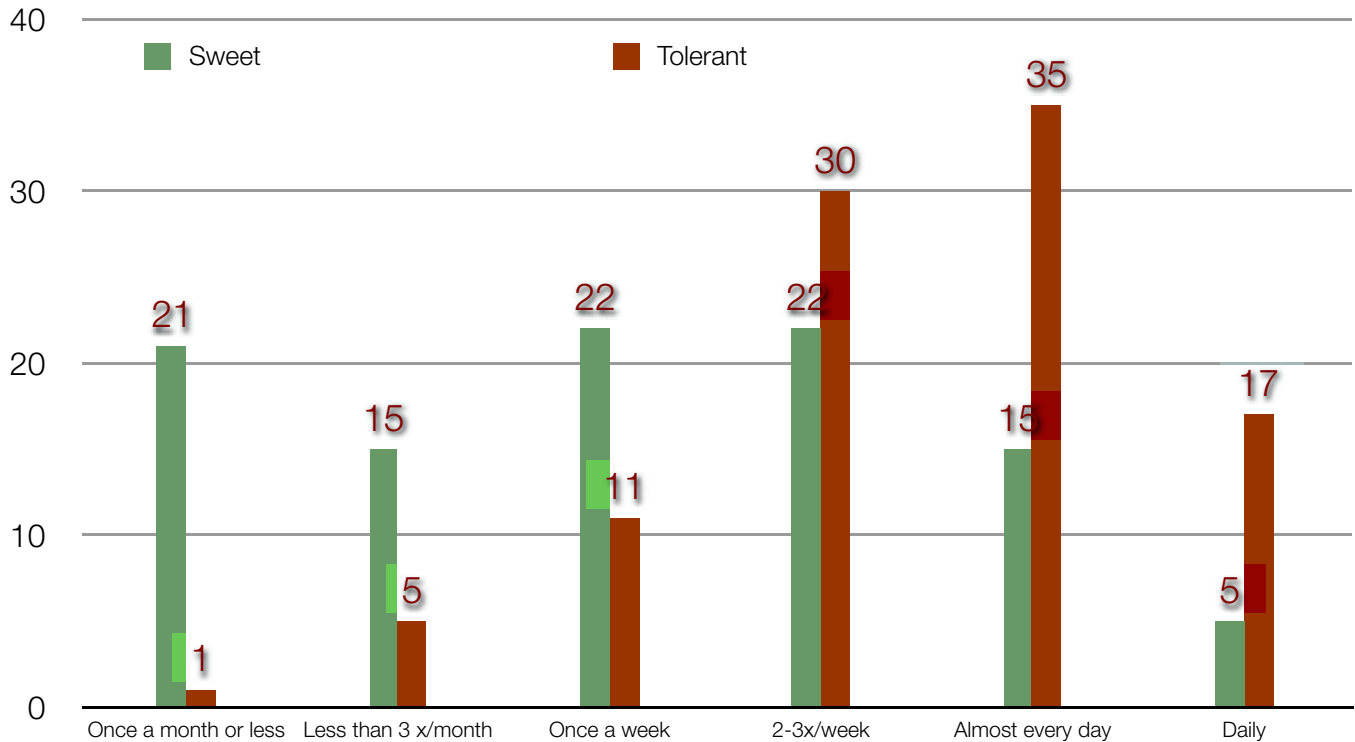
Percent of each group with each answer to:

Which of the following best describes your confidence level when you are considering choosing wines for the enjoyment of others?



FREQUENCY OF WINE CONSUMPTION

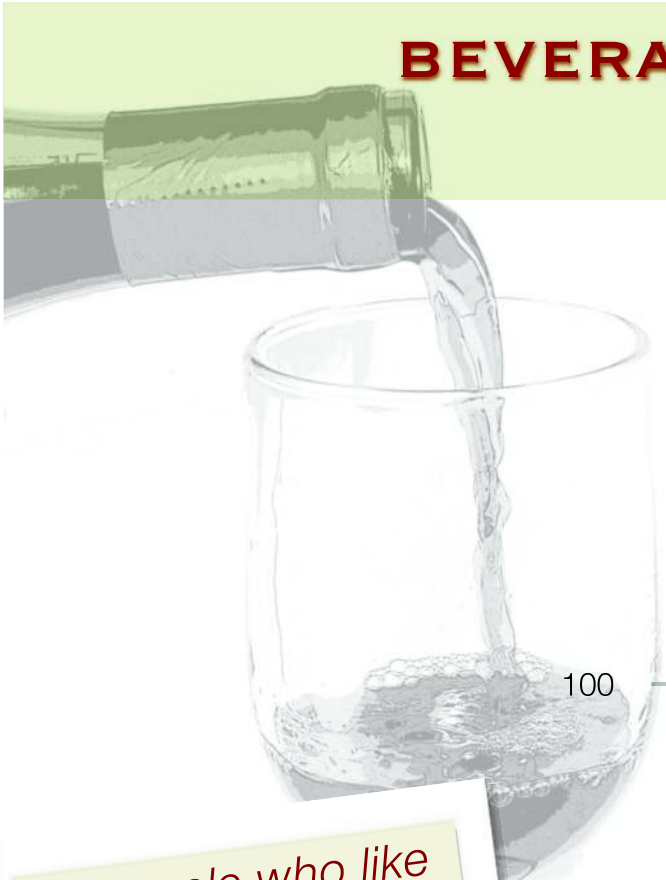
Percent of respondents consuming wine at each frequency for each taste group.



Respondents in the Sweet group drink wine far less often than do Tolerants.

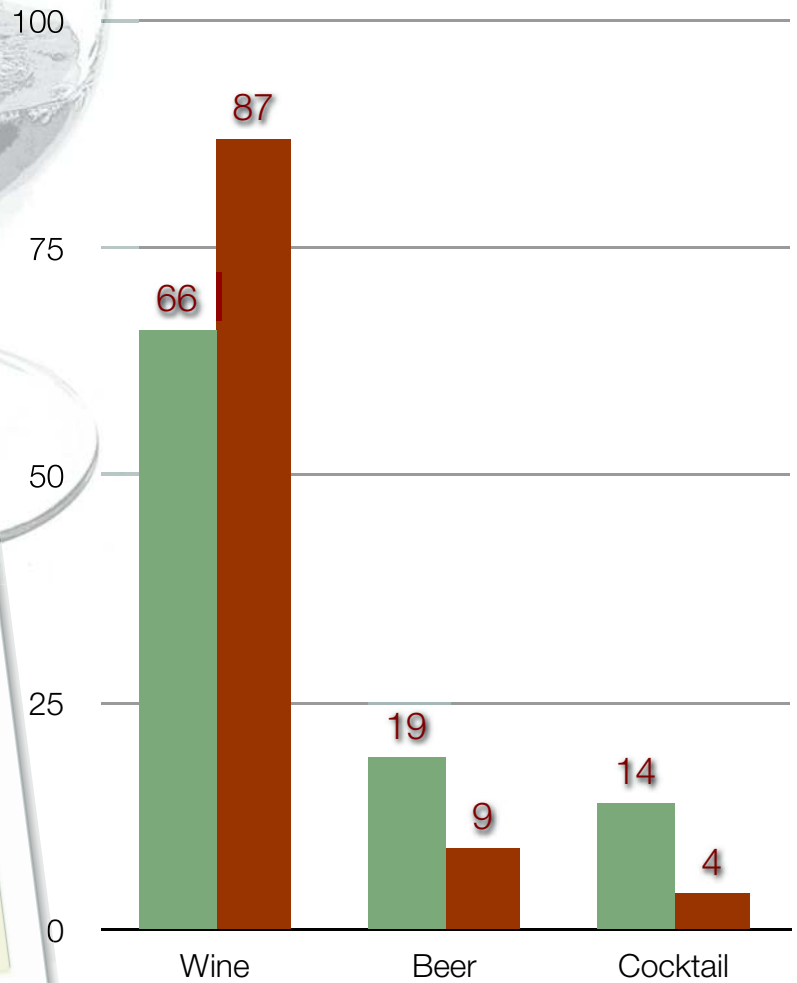
HOW DO WE ENCOURAGE 'SWEET' CONSUMERS TO DRINK WINE MORE OFTEN?

BEVERAGE PREFERENCES BY OCCASION



Percent of each group with each answer to:
When you are at home what is your primary choice for an adult beverage?

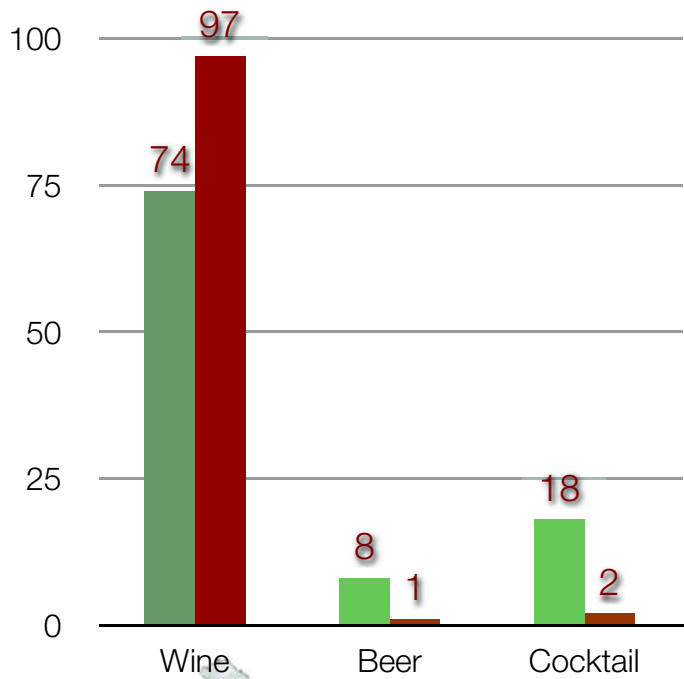
■ Sweet ■ Tolerant



People who like sweeter wines are more likely than Tolerants to drink beer and cocktails at home.

By contrast, Tolerants overwhelmingly choose wine to drink at home.

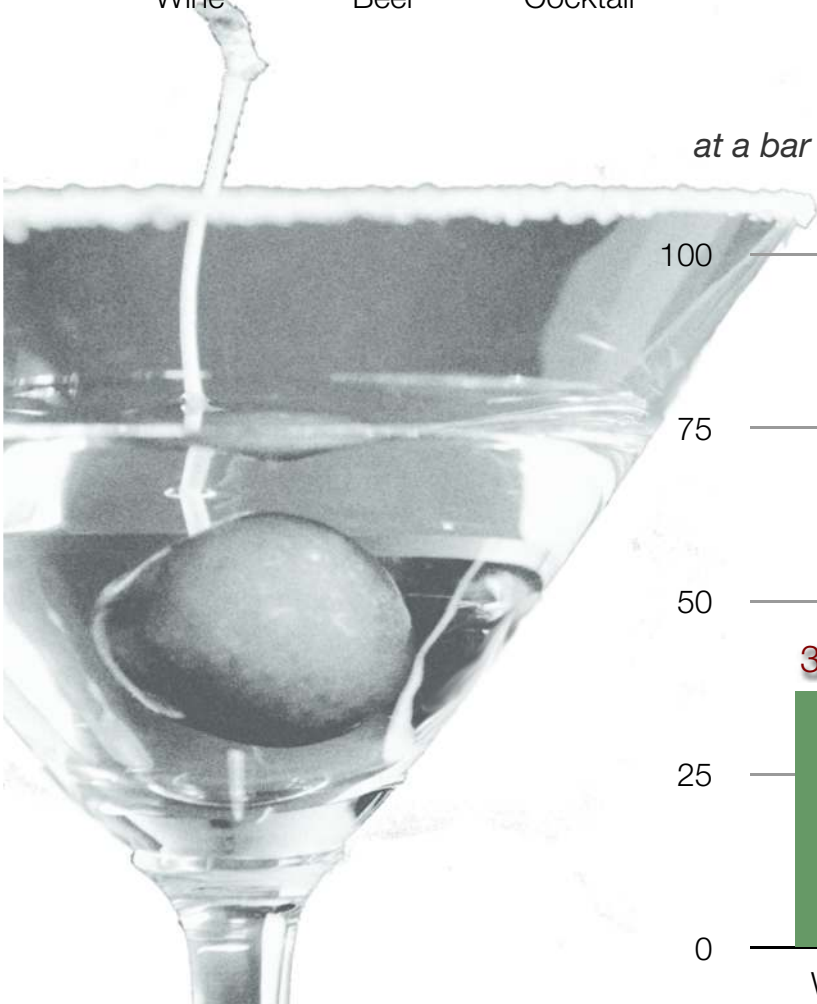
When you dine out at a *fine restaurant* what is your primary choice for an adult beverage?



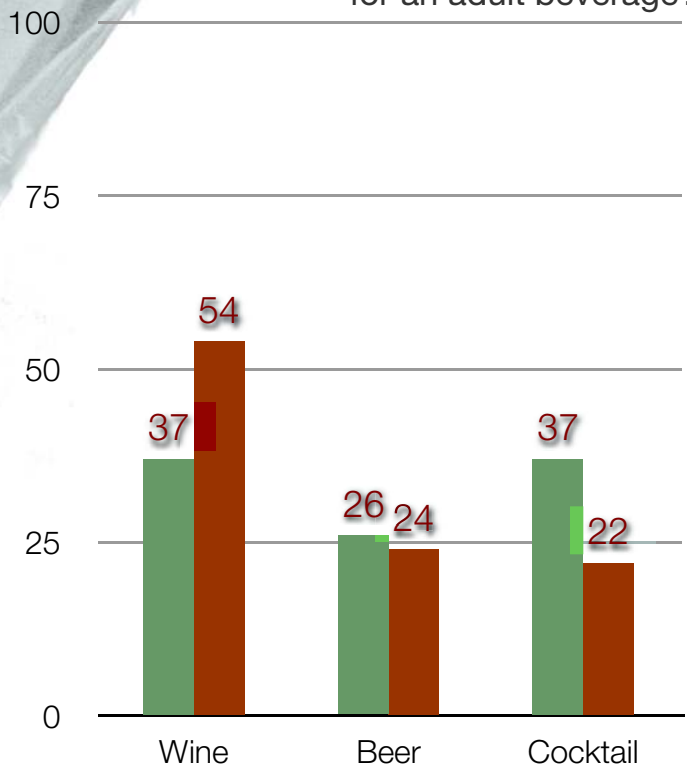
*While **Tolerant** respondents dining at a fine restaurant choose wine almost exclusively, nearly one in five respondents in the **Sweet** group order cocktails.*

*The **Sweet** group's preference for cocktails is even more marked at bars and non-dining social functions.*

■ Sweet ■ Tolerant



When you are dining out or are at a bar or non-dining social function/party what is your primary choice for an adult beverage?

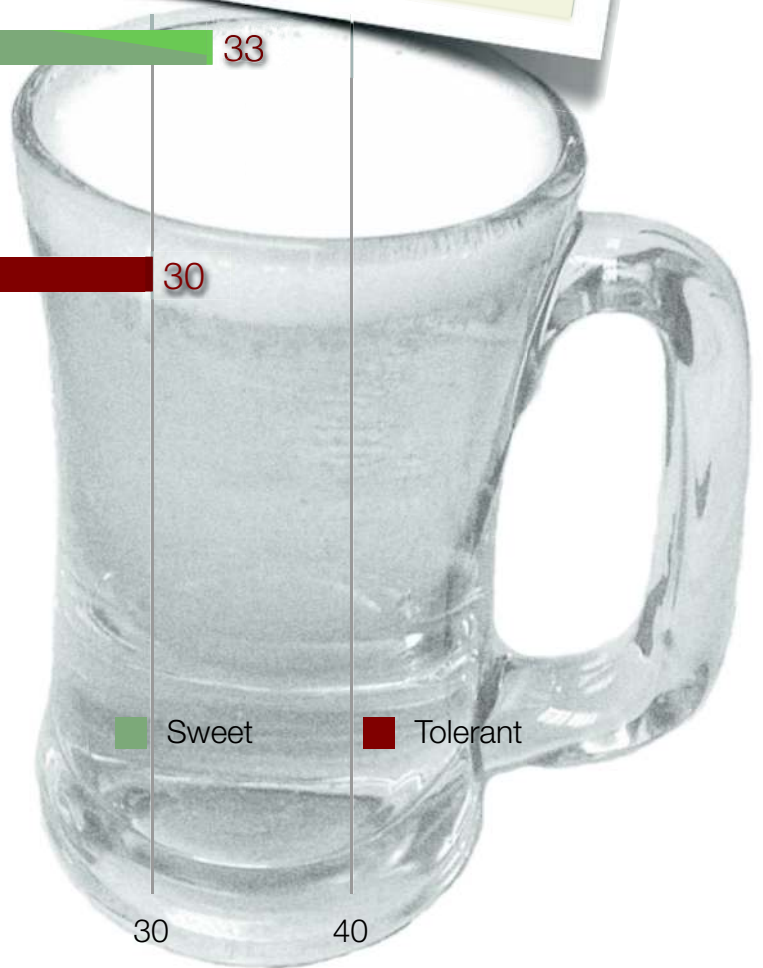
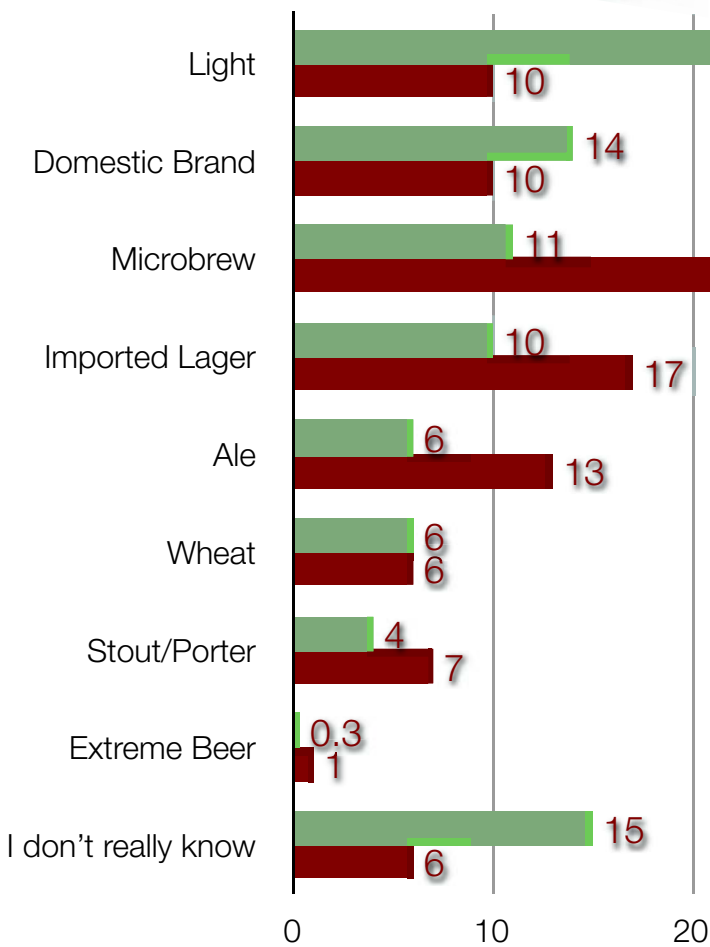


The Sweet group's preferences for light tastes extends to beer...

...while the Tolerants taste for **intensity** and **alcohol** leads them to choose beers they consider less watery, diluted, and "wimpy."

THE 'SWEET' GROUP'S PREFERENCE FOR LIGHTER TASTES MEANS THAT THEY EXPERIENCE THE SAME DISENFRANCHISING ATTITUDES WHEN IT COMES TO BEER!

BEER PREFERENCES

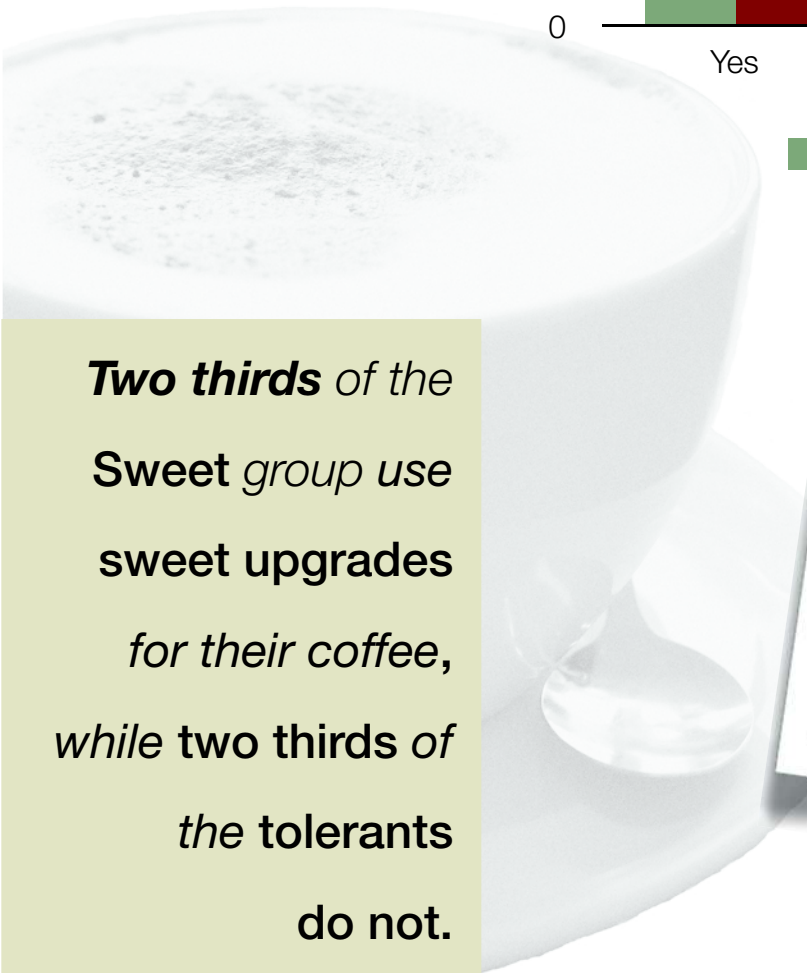
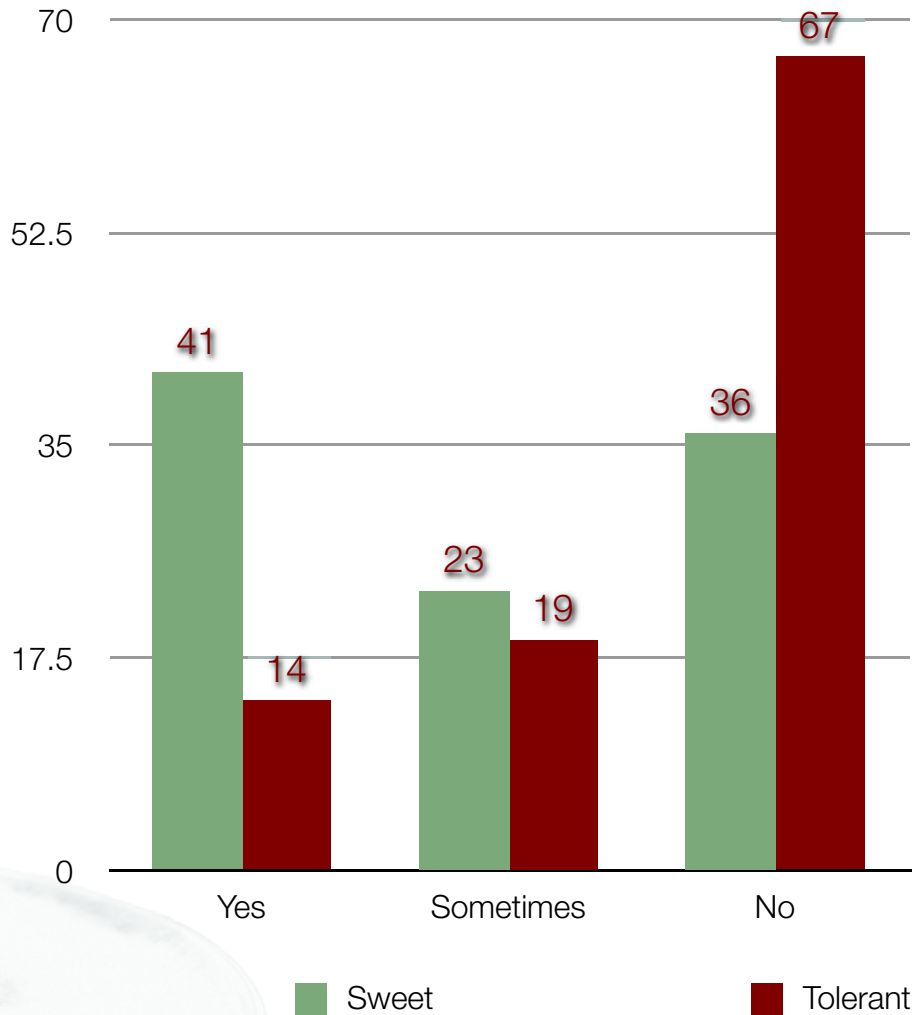


■ Sweet ■ Tolerant

Percent of each group with each answer to:

Do you ever add flavored creamers or shots like almond, hazelnut, vanilla, caramel or Irish cream to your coffee?

COFFEE FLAVORING



Two thirds of the Sweet group use sweet upgrades for their coffee, while two thirds of the tolerant do not.

Sweet respondents are spending extra to have flavorings added to their coffee.