The results of a market survey into Italian families buying wine in large-scale distribution and other purchase channels.

Verona, 25 March 2012 – Times of recession and crisis, but how are consumers reacting as regards wine purchases in supermarkets? For everyday wine accompanying family meals, they especially look at price, while for gifts or when inviting guests to dinner the focus is distinctly on DOC wines. Consumers seem to be rather unsure over criteria of choice and would therefore like to see large-scale distribution provide shelves that are easier to read, organised by type (white, red, etc.) and Region. They view supermarkets with relative trust, convinced that the higher profits on wine in supermarkets in any case go to wine cellars. Lastly, supermarkets are still the preferential place for wine purchases, even ahead of cellars and wine stores.

This emerges from the research titled “Consumer attitudes and behaviour as regards wine and in relation to large-scale distribution” commissioned by: VeronaFiere of Dr. Marilena Colussi, sociologist specialising in dietary trends who, in collaboration with C.R.A., analysed a representative sample of the over-18 Italian population after interviewing more than two thousand Italians by February 2012.

This research will be presented tomorrow (Monday 26 March) at Vinitaly in Verona during the Round Table titled “New wine purchasing and consumption habits in large-scale distribution” (Palaeexpo, Vivaldi Room, 10.30).

"Official statistics for many years have highlighted the increase in wine sales through supermarkets," said Marilena Colussi, author of the research project, "with growth in both low and high price bands: but what do consumers really think? Consequently, for the first time, we interviewed consumers themselves using a very well defined and representative sample: a picture emerges of consumers no longer merely interested in the convenience offered by large-scale distribution but also in information and wine culture in order to qualify increasingly their purchases."

One of the most hotly debated questions among the strategists of large-scale distribution and ordinary consumers alike is the organisation of wine shelves, because - when hundreds and hundreds of bottles are lined - up the risk for consumers is one of disorientation.

The research shows that in first place consumers (in the two sub-targets analysed - wine drinkers in general and people buying wine in large-scale distribution) would like to see a
clear distinction by type (42%): still white wines, semi-sparkling whites, red, sparkling wines (Spumante), Prosecco, Champagne and dessert wines. Second place (39% of wine buyers through large-scale distribution, 35% for wine drinkers in general) is taken by the request for a clear identification of the origin by Region (or Country). Proce takes third place, that is division by price bands (32% of wine buyers through large-scale distribution, 31% wine drinkers) and fourth place (26% and 27% for the two targets) a division by grape types (Merlot, Barbera, Pinot, etc.). In fifth places comes wine and food pairings (23%). (See Table 1).

Wine consumers seem to have a good relationship with large-scale distribution and appreciate the broad differentiation of the offering in terms of price bands and quality. The existence of a good relationship based on trust with large-scale distribution also emerges from the answers given by interviewees to the question “who earns relatively more on the price of wine sold through large-scale distribution among the various subjects involved in the value chain?” : the answers by the majority of wine-buyers through large-scale distribution referred to the overall group of producers and bottlers (50%), while 32.4% thought that large-scale distribution makes the most profit (see table 2).

It is no coincidence that consumers prefer purchasing wine in supermarkets rather than elsewhere: this is the case for 62.9% of interviewees, followed by a significant 25% of purchases through producer-wine cellar/cooperative wine cellar, 7.3% through wine stores and 5.1% through other types of format (shops, wholesalers, home sales and internet, farm holiday centres) (see table 3).

The perception and image of wine sold through large-scale distribution is also distinctly better. This was the case for 78.3% of consumers (see table 4), who are increasingly oriented towards 75 cl glass bottles (53.5% of the formats purchased most often in large-scale distribution), followed by 13% of purchases in 1 litre glass bottles, 12.1% in 1 litre brick cartons, 10.6% in larger formats (demijohns), 6.9% for 1.5 litre bottles and from 2.8% for 3x25 cl brick cartons. (see table n° 5). 55.6% of wine purchases through large-scale distribution in the last 6 months involved Doc, Docg and Igt wines, with a significant of loyal buyers for this type of wine (43.2% of frequent purchases) (see table 6).

The research by Dr. Colussi, in collaboration with CRA, also analysed the general behaviour of wine consumers, regardless of the preferred place of purchase: they believe that Italian wine is the best in world, although they also enjoy tasting international wine every now and then, looking especially for quality and always asking for more information about wine.

73.4% of the total sample and an impressive 88% of regular drinkers in short believe that Italian wine is “the best in the world” (see table 7). In the last 12 months, almost one-third of drinkers has tried an imported wine (yet the figure also includes French Champagne), so this is a growing phenomenon that should be viewed in the increasingly wider readiness to try something different in terms of tastes and flavours. (See Table 8)

The second most popular element concerns the focus on quality: for 8 drinkers out of 10, this is a decisively important factor and for 7 out of 10 it is equally important to identify origin.
Four drinkers out of 10 say that wine purchases are made essentially in terms of quality and not price; this attitude is even more evident for wine purchased as a gift or to enjoy with family and friends. The role of certification brands such as DOC, DOCG, IGT act as important qualitative and safety indicators, followed by the brand of the producer and the information first and foremost provided on the label (see tables 9 and 10).

A third important aspect characterising the relationship with wine concerns information and knowledge; the majority of wine drinkers would like to know much more: there is demand for information, reassurance, emotions and culture.

A fourth important topic concerns the social and dietary context where wine consumption is ideally set in Italy.

As regards taste, the majority tend to drink increasingly lighter wines (55.2% of the Italian wine drinkers interviewed and in particular 62% of occasional drinkers), while the favourite wines among regular drinkers are to all intents and purpose equally divided between sparkling white wines/champagne and red wines (see table 11).

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