Archived at http://orgprints.org/10608/

Deliverable

SIXTH FRAMEWORK PROGRAMME

Area 1.2 - Task 1: Organic viticulture and wine processing

Project number: **022769**

Project acronym: **ORWINE**

Full project title: **Organic viticulture and wine-making: development of environment and consumer friendly technologies for organic wine quality improvement and scientifically based legislative framework**

Deliverable: D 2.7 Public report about first round in depth qualitative consumer research and market needs

Part of Workpackage: **WP2 - Status quo analysis of wine producer practices, market needs and consumers perception**

FP 6 Instrument: **Specific Targeted Research or Innovation Project (STRIP)**

Thematic priority: **Priority 8.1: Policy-oriented Research (SSP)**

Due date of deliverable: **31.01.2007** Actual submission date: **31.01.2007**

Start date of project: **February 2006** Project duration: **March 2009**

Name of author and co author, organisations: **Hanna Stolz and Otto Schmid, Research Institute of Organic Agriculture**

SIXTH FRAMEWORK PROGRAMME

Funded by the European Commisson under the Sixth Framework Programme for European Research & Technological Development (2002-2006) - Thematic area Food quality and safety

Content

Research Institutions and Authors 5

Acknowledgement 8

Summary 9

1 Introduction 12

2 Objectives 13

3 Main conclusions from the literature review 14

4 Methodology 16

4.1 Focus group discussion – a qualitative market research method 16

4.2 Survey design 17

4.2.1 Location and date of the focus group discussions 17

4.2.2 Participants and recruitment 17

4.2.3 Focus group procedure 18

4.2.4 Equipment 19

4.3 Analysis 20

5 Results of the focus group questionnaire 21

5.1 Socio-demographic characteristics 21

5.2 Wine consumption habits 22

6 Results of the focus group discussions 26

6.1 Criteria relevant for consumers buying decision of wine 26

6.1.1 Geographical origin as purchase criterion 27

6.1.2 Grape variety as a purchase criterion 28

6.1.3 The purpose of wine consumption as a purchase criterion 28

6.1.4 Taste as buying criterion 28

6.1.5 Variation as buying criterion 29

6.1.6 Type of wine as a purchase criterion 29

6.1.7 Advice and recommendation as buying criterion 29

6.1.8 Point of purchase as a purchase criterion 30

6.1.9 Production system as a purchase criterion 31

6.1.10 Wine appearance and presentation as a purchase criterion 31

6.1.11 Other aspects 31

6.2 Quality criteria of wine 33
6.2.1 Geographical origin as a criterion for quality 34
6.2.2 Production system as a criterion for quality 35
6.2.3 Wine processing as a criterion for quality 36
6.2.4 Product attributes as quality criteria 36
6.2.5 Appearance, presentation and labelling as quality criterion 40
6.2.6 Point of purchase as a sign of quality 40
6.2.7 Price as a quality criterion 41
6.2.8 Harvesting year as a quality criterion 41
6.3 Perceptions and image of organic wine 41
6.3.1 Geographical origin 43
6.3.2 Production 44
6.3.3 Processing 45
6.3.4 Availability of organic wine 46
6.3.5 Aspects related to organic wine ingredients 48
6.3.6 Aspects related to taste 49
6.3.7 Health/Salubriousness 51
6.3.8 Price-performance ratio 52
6.3.9 Trust 54
6.3.10 Authenticity 55
6.3.11 Social aspects 55
6.4 Consumer knowledge of wine ingredients, additives and processing aids in vinification 56
6.4.1 Additives (e.g. sulphites, organic acids) 56
6.4.2 Cultures (e.g. bacteria, yeasts) 56
6.4.3 Processing aids (e.g. clarifiers e.g., bentonites; stabilizers e.g. sulphites, enzymes) 57
6.5 Perception of selected additives and processing aids used in vinification 58
6.5.1 Sulphites 60
6.5.2 Enzymes 61
6.5.3 Selected yeasts 62
6.5.4 Wood chips 62
6.5.5 Food gelatine 63

6.5.6 Selected bacteria 64
6.6 Labelling requirements for organic wine 65
6.6.1 Geographical origin 65
6.6.2 Labels and information about the labelling programme 65
6.6.3 Amount of information 66
6.6.4 Expiry date / shelf-life 67
6.6.5 Advice for consumption 68
6.6.6 Other aspects 68
6.7 Perception of differences between grapes for vinification and grapes for consumption 69
6.7.1 Growing area / “terroir” 69
6.7.2 Grape variety (skin, size, seeds) 69
6.7.3 Time of harvesting 69
6.7.4 Harvesting practices and yield 70
6.7.5 Pesticide treatment 70
6.7.6 Taste 70
6.7.7 Appearance and other issues 70
6.8 Perceptions of organic grapes compared with conventional grapes 71
6.8.1 Production intensity (high intensity, low intensity) 71
6.8.2 Production methods (herbal and disease control) 71
6.8.3 Date of harvesting 72
6.8.4 Harvesting technique (hand picking, mechanical picking) 72
6.8.5 Appearance of grapes (size, appearance) 72
6.8.6 Shelf-life 73
7 Discussion 74
7.1 Dual role of organic wine 74
7.2 Purchase and quality criteria of wine 74
7.3 Image of organic wine 75
7.4 Consumer requirements of the processing techniques for organic wine 76
7.5 Consumer requirements of the labelling system for organic wine 77
8 Conclusion and recommendations 79
8.1 General conclusions 79

8.2 Recommendations for different actors 80

Appendix 1 83

Appendix 2 85

Appendix 3 87

Appendix 4 90

List of tables

Table 1: Location and date of the focus group discussions in 2006 17

Table 2: Age distribution of focus group participants in percentage terms 21

Table 3: Gender distribution of focus group participants in percentage terms 21

Table 4: Occupation of focus group participants in percentage terms 22

Table 5: Wine consumption frequency of consumers of quality wine (W) compared with consumers of organic wine (O) in percentage terms 22

Table 6: Origin of wine consumed in percentage terms 23

Table 7: Type of wine preferred in percentage terms 23

Table 8: Preferred point of purchase in percentage terms 24

Table 9: Preferred wine prices for everyday consumption in percentage terms 24

Table 10: Preferred wine prices for special events in percentage terms 25

Table 11: Preferred type of closure in percentage terms 25

Table 12: General overview on buying criteria relevant for wine 26

Table 13: General overview on relevance of quality criteria 34

Table 14: Image of organic wine regarding a choice of aspects related to production, processing, quality and other aspects 42

Table 15: Spectrum of arguments regarding the acceptance additives and processing aids in organic viticulture (OV) 59

Research Institutions and Authors

The following research institutions and authors have contributed to this report:

Cristina Micheloni and Raffaella Roviglioni

P2 AIAB

Associazione Italiana Agricoltura Biologica

Via Piave 14, I - 00187 Roma / Italy, Tel.: 0039 06 4543 7485 -6-7, Fax: 0039 06 4543 7469

c.micheloni@aiab.it

Marie-Christine Monnier

P3 ITAB

Institut Technique de l'Agriculture Biologique

Mas de Saporta, F - 34875 Lattes / France, Tel.: 0033 467 062 393, Fax: 0033 467 065 575

mcm.bio@wanadoo.fr

Otto Schmid and Hanna Stolz
P5 FiBL
Research Institute of Organic Agriculture (FiBL)
Ackerstrasse, CH-5070 Frick, Switzerland
E-Mail otto.schmid@fibl.org
Secretary: Tel. +41 62 865 72 72, Fax +41 62 865 72 73, info.suisse@fibl.org, www.fibl.org

Prof. Dr. Dieter Hoffmann[1)] and Maik Werner[2)]

P SRIG 7

State Research Institute Geisenheim[1)] – Department of economics and market research, Department of Microbiology and Biochemistry[2)]

Von-Lade-Straße 1, D - 65366 Geisenheim / Germany, Tel.: 0049 6722-502 331, Fax: 0049 6722 502 330

Following companies were subcontracted:

Christopher Hay
Übersetzungsbüro für Umweltwissenschaften
- Translation Bureau for Environmental Sciences

Raiffeisenstrasse 1

D-64342 Seeheim, Germany

Phone +49-6257-9990-76, Fax -78

ecotranslator@t-online.de

http://www.ProZ.com/translator/4768

Azienda Romana per i Mercati

Via de' Burrò, 147
00186 Roma
Tel. (+39) 06 69792401 – Fax (+39) 06 6794845

Denis Le Chatelier Conseil
85, rue Lemercier 75017 PARIS.
Tel/Fax: 0033 1 42 29 09 75.
E-mail: denis.le.chatelier@wanadoo.fr

LFP Conseil
10 rue de Baccarat
44300 NANTES, France

ITEMS - Studio für qualitative Marktforschung GmbH
Tauentzienstr. 7 a
10789 Berlin, Germany

CallTec Backoffice
Alpenstrasse 11
6300 Zug
Tel: +41 41 560 01 00
Fax: +41 41 560 01 01
backoffice@calltec.ch
www.calltec.ch

Acknowledgement

The authors gratefully acknowledge financial support from the Commission of the European Communities, under Priority Area 1.2 (Organic Viticulture and Wine Processing) of the Sixth Framework Programme for Research, Technological Development and Demonstration within the Integrated Project No. 022769 (Organic viticulture and wine-making: development of environment and consumer friendly technologies for organic wine quality improvement and scientifically based legislative framework). The information in this report does not necessarily reflect the Commission's views and in no way anticipate the Commission's future policy in this area.

The contents of this report are the sole responsibility of the authors. The information contained herein, including any expression of opinion and any projection or forecast, has been obtained from sources believed by the authors to be reliable but is not guaranteed as to accuracy or completeness. The information is supplied without obligation and on the understanding that any person who acts upon it or otherwise changes his/her position in reliance thereon does so entirely at his/her own risk.

This publication represents the report about task 2.6 in work package 2. "Status quo analysis of wine producer practices, market needs and consumer perceptions" of the Integrated Project No 022769 "Organic viticulture and wine-making" (Sixth Framework Programme for European Research & Technological Development (2002-2006) of the European Commission). For further information see the project homepage at www.orwine.org.

Our thanks also go to Mr. Christopher Hay, Translation Bureau for Environmental Sciences, for language correction of the manuscript.

Summary

This survey of consumers' perceptions and expectations regarding organic wine and viticulture in the selected case study countries of Italy (IT), France (FR), Germany (DE) and Switzerland (CH) was conducted within the framework of the EU research project ORWINE (Organic viticulture and wine-making: development of environment and consumer friendly technologies for organic wine quality improvement and scientifically based legislative framework).

The objectives of the study were to investigate consumers' knowledge and expectations regarding organic wine and viticulture, their preferences regarding different labelling concepts, and their perceptions regarding sulphites and/or the use of other additives. Consumers' perceptions of organic table grapes and of more general aspects of organic viticulture, e.g. environmental impacts, were also investigated. Two target groups were identified for the study, namely organic consumers and quality wine consumers. The method chosen to achieve the study's objectives was the qualitative market research method of focus group discussion.

The main findings of the consumer study are that consumers purchase wine according to geographical origin, grape variety and price. The price is often a benchmark for consumers regarding the quality of the wine on offer, even though some consumers doubt whether cheap wines are automatically poor quality wines or, conversely, whether expensive wines are always high quality wines.

Regarding the image of organic wine, it may be described as highly positive in terms of production and processing, with the main emphasis on the issue of pesticide treatments, which are prohibited in organic grape production. Organic wine, in contrast to conventional wine, is expected to come from small-scale production facilities. In addition, organic wines are considered to be purer wines with no additives or harmful residues compared with conventional wines. Thus, they are also considered as healthier and more salubrious by those consumers with experience of organic wine. Nevertheless, organic wine has a rather poor image regarding taste. One group of consumers is disappointed because they see no additional benefits regarding taste and think that organic wines taste worse than conventional wines in some cases, mainly due to too much acidity. Only very few consumers stated that they appreciate the more individual taste of organic wine. The consumer study indicates clearly that communication strategies have to take account of this negative image regarding taste in particular. However, one problem is that wine shops, which are visited to purchase high quality wines, do not usually offer organic wines. Thus, consumers tend to believe that no organic premium wines exist.

Consumer acceptance of a limited range of additives and processing aids commonly used in conventional wine processing was also investigated. Here, the emphasis was on acceptance of sulphites, wood chips, selected bacteria, yeasts and enzymes, as well as gelatines. Levels of acceptance of specific additives and processing aids in organic wine processing differ between consumers. Four strategies were identified in this regard: 1) ban substances that are a danger to health, regardless of whether they are necessary

for making a good wine; 2) prohibit additives or processing aids which affect wine flavour and/or its naturalness or tradition, or 3) allow the same substances to be used as in conventional production, but introduce lower thresholds for organic wine than for conventional wine, and introduce a declaration of their use in organic wine processing. None of these three strategies seems to be the appropriate one. However, a combination of the strategies would match most consumers' interests. Clear contrasts to organic wine should be established here, especially in relation to critical and harmful substances. This would imply a threshold for sulphites as long as no alternatives are found. Wood chips should be forbidden or their use openly declared. Enzymes, yeasts and bacteria should not be genetically modified but derived by natural means.

Labelling requirements were also investigated. Four different strategies were identified: 1) a complete list of ingredients, additives and processing aids and methods to appear on the label with an indication of the quantities of additives and processing aids; 2) a reduced list of ingredients with the declaration of specific additives and processing techniques; 3) a declaration of those substances which were not used, and 4) no declaration other than the organic label which stands for unambiguous cellar regulations. The first suggestion would be the most transparent solution. However, it would entail unfair competition between conventional and organic wine if conventional wines were not subject to the duty of declaration. Besides this, a complete list would be too much for consumers and wine bottle tabs alike. The second strategy is aimed at informing consumers about organic wine processing methods, but the problem of unfair competition still exists if only organic wine has the duty of declaration. A declaration of those substances not used is probably a good way to inform consumers and to communicate the benefits of organic farming at the same time. Thus, this labelling concept is beneficial in terms of improving the marketing potential of organic wine. The last solution does not imply an unfair competitive situation for organic wine; however, consumers would need to take action themselves to find out the differences between organic and conventional wine. They would have to research which regulations are behind the organic label. This would certainly entail too much effort for some consumers if the benefits of organic wine are not clearly communicated.

The consumer survey has identified the most relevant areas, which have to be considered, when regulating wine in the European Union. These are on one hand the use of additives and processing aids and on the other hand the labelling.

If in the EU regulation for organic food and farming, or in European community rules, organic wine is taken up, consumers are expecting rules which fit to their expectations towards organic wine as being a "natural" product, which is as little as possible alternated. Therefore, the list of additives and processing has to be short. Additives are in general not a problem if no risk can be associated with them, e.g. the use of egg-based additives or gelatine might be further restricted to plant-based sources and not animal derived substances. Consumers must be ensured that with the regulation the use of yeast and bacteria do not have a risk of GMO-contamination.

Regarding the use of sulphites, the results can be interpreted in 2 ways: either set a maximum level, which ensures no health risks but guarantees a good wine. There was no clear indication from the consumer study, that sulphites should be completely banned

for organic wine production (with few exceptions), although for most consumers sulphites were seen as critical. However, a lower maximum sulphite level might be a solution, which committed organic consumers would understand, although the exact level will not be so important. The second solution would be to forbid sulphites.

Regarding labelling, consumers want to know where the wine is coming. The new proposed draft for a new EU regulation for organic food and farming will be more demanding regarding labelling the origin, in particular if the products come from the EU or non EU areas. Although the requirement of labelling the origin is in the interest of the wine producer, it is clear that in particular for organic wine transparency regarding the origin is even more important than for non-organic wine. Regarding the use of wood chips two ways could be considered: the exclusion or the labelling of their use.

Other issues like restrictions of specific processing methods could not be clearly extracted from this consumer research. Therefore this seems for the time-being not a priority area for the EU commission, when regulating organic wine.

Regarding the private organic wine sector, producers should reinforce their presence at wine awards to prove the premium quality of their products and organize wine tasting events in order to improve contact to consumers and direct sales. Besides, the presence of organic wines in specialized wine shops should be reinforced. Wine makers should further work on the sensorial quality of organic wines.

Retailers should provide more information at the point of sale (leaflet, homepage, label) with information about the producer as well as about production and processing methods applied and the “terroir” of origin. Furthermore, wine tasting events at the point of sale would give consumers the opportunity to try organic wines. Besides, the organic label should not be at the front of the wine bottle as long organic wine has a negative quality image.

The consumer survey has also shown two areas, where also research could contribute with further research: Research which contributes to reduce the use of additives and processing aids corresponds to the expectation of many consumers. This does include lowering the level of the use of additives and especially sulphites, as researched in the ORWINE project. Although the health aspect was of second priority many consumers in the survey linked organic production with health attributes. Further research on health promoting substances such as secondary metabolites, e.g. resveratrol, would for them be of interest.

Advisory services should support wine producers and processors to improve the taste of their wines, by providing better knowledge about the different inter-acting factors regarding the production of high quality wines.

To conclude, the survey has shown interesting fields of action for policy makers, producers and their organizations, retailers as well as research.

1 Introduction

The European Union has a leading position on the world wine market, accounting for 45% of wine-growing areas, 65% of production, 57% of global consumption and 70% of exports in global terms (European Commission 2006). As viticulture and grape production was converted early to intensive chemical treatments in conventional agriculture, the development of organic alternatives, dating back to the 1950s, occurred comparatively early on in response (Willer and Yussefi, 2006). In the 1990s, the organic wine sector began a period of continuous growth that continues today. In 2004, the proportion of organic vineyards reached a level of 3.4% of the total number of vineyards in Italy (IT), 1.9% in France (FR), 2.4% in Germany and 2.4% in Switzerland (Willer and Yussefi, 2006). Just as in the early days of organic wine production, the focus has been on seeking alternatives to the use of chemical/synthetic fertilizers and pesticides, and so less attention has been paid to the cellar and wine quality (Willer and Yussefi, 2006). Thus, organic wine has not enjoyed a good reputation as far as taste and sensory quality are concerned, and even today the perception and assumption persists that organic wine is of inferior quality. The hypothesis addressed in this study is that organic wine producers in some areas are still facing image problems related to quality, particularly with regard to taste.

It can be assumed from qualitative consumer surveys in the EU project OMIaRD (Organic Marketing Initiatives and Rural Development) in several European countries – although it did not focus on wine from organic viticulture – that for consumers of organic food the health aspect is of greatest importance. For regular organic consumers, environmental concerns are also important buying motives, while for occasional consumers taste is especially relevant (Zanoli et al. 2004).

However, although research has supported organic grape and wine production (Willer and Yussefi, 2006) during the last two decades, little knowledge exists about the perceptions and expectations of consumers with regard to organic wine; no study exists at all at pan-European level. There is still little knowledge available about the target group of organic wine and about buying motives and barriers, as well as about perceptions of organic wine and viticulture.

Thus, a qualitative consumer survey (using focus group discussions) was carried out in order to investigate consumers' perceptions and expectations of organic wine and viticulture, the public image of organic wine as regards quality, buying motives, and the public's response to possible labelling schemes.

2 Objectives

The objectives of the consumer research were to identify consumers' perceptions and requirements of organic wine and viticulture, to determine their buying motives, and to establish the needs of the organic wine market in order to make it possible to address labelling provisions and communication strategies. The main focus was on exploring the knowledge of different consumer segments and their preferences regarding organic wine/organic viticulture. Other important issues were consumers' preferences regarding different labelling concepts and their perception regarding sulphites and the use of other additives, organic table grapes and more general aspects of organic viticulture, such as its environmental impact.

The Technical Annex required the investigation of the following issues:

- Consumer knowledge and expectations regarding organic wine and viticulture
- Preferences regarding different labelling concepts
- Perceptions regarding sulphites and/or the use of other additives
- Perceptions of organic table grapes
- More general aspects of organic viticulture, e.g. environmental impacts

3 Main conclusions from the literature review

Literature about consumer studies on wine and on organic wine in particular is rare. This chapter therefore reviews some additional literature on consumers' perceptions of organic food products in general.

Italian organic consumers state that they are interested in a more "natural" method of wine processing and are willing to pay a bit more for such products. In addition, organic wine consumers in Italy tend to associate wine consumption with health, because of the antioxidants and beneficial substances contained in wine (Santini 2006).

Renaudon (2002) stated that consumers in France are poorly informed about wines from organic grapes, despite the existence of 3 private standards at French national level: Nature & Progrès (the oldest), Demeter and FNIVAB. Market stakeholders recognize that organic wines are of very high quality, but regret that they are not supported by better product communication. Organic wine consumers seem to be untypical of today's organic food consumers because they buy less organic food and are more aware of prices.

Chevalier identified different types of German consumers for organic wines, depending on the type of wine: the typical organic consumer who has little interest in alcohol, the new urban organic consumer who is looking for wines of "terroir", and the quality wine consumer who is looking for high premium. Organic shops and cellars remain the most important markets for organic wine in Germany. Quality is the first strategic point to consider, and it is necessary to choose the best distribution system for each type of wine. An organic labelling seems to be positive (Chevalier 2003).

Results from Swiss consumer studies indicate that Swiss wines are perceived to be of higher quality compared with wines from other countries. 77% of Swiss consumers do not believe that foreign wines have a higher quality than Swiss wines. Furthermore, 70% of the Swiss population approve of the AOC as a labelling concept to indicate high quality. However, there is clear evidence to suggest that wine consumption in general is decreasing and that wine is mostly consumed when meeting with friends. A growing number of problems are related to the difficulties associated with selling Swiss wines via restaurants. The majority of consumers complain that wine prices in restaurants are too high and therefore tend to drink foreign wines in restaurants (motivation: demand for a greater range of choice). It is mainly the older generation that prefers Swiss wines. Although organic wine is not mentioned explicitly, the general trends in wine consumption can be applied to organic wine as well (Association Swiss Wine 2004).

In another Swiss survey conducted in 2006 among readers of "Merum", a journal of Italian wine and olive oil, readers were asked about their attitude towards additives and processing aids used in wine processing. The journal established special processing regulations for wine based on gentle and natural methods. According to the study, "Merum" readers do not want tannins, enzymes or must concentration used in wine production. Instead, they appreciate wine processing methods that are as gentle as possible. Most survey participants (84%) stated a willingness to pay higher prices for wines produced according to these principles. However, this study is not representative, as only a certain group of persons was surveyed. In addition, Swiss sources indicate that consumers recognize a qualitative difference between traditional and organic wines; Swiss consumers stated further that information on labels is lacking. This information should be brief, comprehensible and contain data on origin, variety and additives.

One problem associated with wine in general is that it is a product that needs to be explained, due to the bewildering array of wines on offer (Konrad, 2004). Fears about choosing the right wine for the right occasion lead to inhibitions around buying wine. There are almost no criteria for making a selection (Konrad, 2004).

During a wine seminar held in Switzerland some years ago, experts discussed the use of wood chips to give the wine a more wooden and vanilla-based aroma (which was not allowed in the EU and Switzerland at the time) (Roland 2002). The opinion was expressed that it is more sustainable to use wood chips rather than to chop down oak forests to produce wine casks. Swiss wine traders claim that there has been an improvement in the quality of grapes and wine. With regard to the kind of consumer information required, it was stated that the information needs to be brief and easily understood: origin, variety, percentage of alcohol, year of production and additives (Rufener, 2004)

Alongside the national reports and studies about the consumption and perception of wine and of organic wine in particular, two relevant pan-European studies exist concerning consumers' perceptions of organic food.

Zanoli et al. (2004) investigated consumers' motivations, expectations, attitudes and behavioural intentions with regard to organic food in Europe. The most significant finding from the study is that consumers generally have a positive image of organic food. However, doubts also exist regarding the feasibility of widespread organic farming and the credibility of control mechanisms and labels; product quality, prices and the suitability of organic products for a modern, fast-moving lifestyle were also identified as problematic. Nevertheless, organic products are perceived as healthy because they contain no pesticides or other agrochemical residues; they taste good and are farmed naturally on a small scale rather than coming from a system of mass production. Furthermore, consumers believe that organic products contribute to environmental welfare; they are associated with a notion of "home" and represent a sensible and conscious lifestyle. Fresh products are associated more with organic products than processed and unhealthy foods in particular. Health seems to be the central buying motive for consumers.

Francois and Sylvander (2006) investigated consumers' perceptions of quality and safety and their behaviour regarding organic and low input food. They found that consumers' perceptions depend strongly on the product itself. Differences exist between processed and unprocessed food, as well as between vegetable and animal products. Regarding processed products, organic products are spontaneously linked with naturalness in processing.

4 Methodology

To investigate consumers' perceptions and expectations of organic wine and viticulture, the qualitative market research method of focus group discussion was chosen. This method is presented in section 4.1 and is followed by an overview of the focus group design in section 4.2.

4.1 Focus group discussion – a qualitative market research method

In market research it is possible to adopt one of two general approaches, namely, qualitative or quantitative market research. Quantitative market research is based on formalized standard questions and predetermined responses (Hair et al. 2006). It also uses numeric data aimed at proving hypotheses. In contrast to this approach, qualitative market research uses explorative designs and is aimed at getting a deeper insight into the background, context and reasons for facts and observations. Qualitative market research is especially suited to explore new issues. It generally uses smaller sample sizes than quantitative research (Hair et al. 2006). Furthermore, qualitative methods are especially suited to investigate consumers' perceptions, attitudes and expectations regarding a certain product.

In this study, a qualitative market research approach was chosen on account of the research objective to explore consumers' perceptions and expectations concerning the largely unexplored topic of organic wine. The limited resources available were an additional factor that led to the choice of a qualitative consumer survey.

The focus group method chosen in this survey is the most common qualitative method (Hair et al. 2006). In this method, about 8-12 participants are invited for an interactive and spontaneous discussion usually lasting 1.5 hours (Hair 2006). The method does not simply rely on a fixed set of questions, as its success depends on group interaction: consumers tend to show less reluctance to express their opinions towards a topic or a product when participating in a group discussion. In addition, the method is appropriate for:

- identifying hidden information requirements;
- providing data that facilitates better understanding of results from other quantitative studies;
- revealing consumers' hidden needs, wants, attitudes, feelings, behaviour, perceptions and motives regarding services, products and practices.

As the aim of the study was to investigate consumers' perceptions, motives and attitudes concerning organic wine and viticulture, the focus group method is especially suitable for this investigation.

4.2 Survey design

This section contains a description of the design of the focus group discussions (FGD).

4.2.1 Location and date of the focus group discussions

Focus group discussions (FG) were conducted during summer 2006 in the four case study countries of Italy (IT), France (FR), Germany (DE) and Switzerland (CH); they took place in central towns with a potentially relatively high proportion of consumers of organic products. The Italian focus groups took place in Milan, Turin, Udine and Rome on the 23rd, 24th, 26th May and 8th June. In France, they were run in Nantes and Paris on the 21st, 26th and 27th of June. The German focus groups were conducted in Berlin on 22nd and 23rd May and the Swiss focus groups on 10th and 11th May in Zurich (see Table 1).

Table 1: Location and date of the focus group discussions in 2006

Case study country	IT	FR	DE	CH
FGD 1	May 23rd in Milan	June 21st in Nantes	May 22nd in Berlin	May 10th in Zurich
FGD 2	May 24th in Turin	June 26th in Paris	May 22nd in Berlin	May 10th in Zurich
FGD 3	May 26th in Udine	June 21st in Nantes	May 23rd in Berlin	May 11th in Zurich
FGD 4	June 8th in Rome	June 27th in Paris	May 23rd in Berlin	May 11th in Zurich

FGD = Focus group discussion

4.2.2 Participants and recruitment

Four focus groups containing 8-12 participants each were conducted in each of the case study countries, making a total of 16 focus groups. The participants were consumers belonging to two different target groups:

- Regular consumers of organic food, half of them with experience of organic wine; (O)
- Quality wine consumers (W).

The focus group discussions were conducted with these two consumer segments, each group being reconvened on a further occasion. To facilitate their participation, consumers' travel and subsistence expenses were paid.

The recruitment was carried out by subcontracted market research companies. The target groups were identified by means of a recruitment questionnaire (see Appendix 1 and 2). This questionnaire contained two parts. In the first part, typical socio-demographic characteristics, such as age and gender, were considered. People who worked in professions related to wine were excluded. Consumers were asked about the frequency of their wine consumption and were excluded from the survey if they consumed wine less than once a month. In the second part, questions related specifically to each target group were asked:

- Quality wine consumers were identified by a certain willingness to pay higher prices for wine. Another criterion was whether they make a special effort to purchase wine and look for advice and recommendations, rather than simply buying wine in the supermar-

ket. A third filter question provided assurance on whether the person had any involvement in wine production and processing.

- Organic consumers were identified by the frequency of their purchase of different organic product groups. To ensure that the recruitment process was really targeting organic consumers with enough knowledge to judge whether they purchase actual organic products (instead of considering, for example, the eggs they get from their neighbour as organic, even though they have no organic certification), interviewees were asked about their knowledge of organic farming labels. Half of the organic consumers to be recruited were to have tried organic wine at some point in the past.

4.2.3 Focus group procedure

To have comparable discussions and results between the different case study countries, FiBL, in collaboration with its partner SRIG, prepared a set of discussion guidelines (see Appendix). The aim of the focus group guidelines was to provide a structure for the focus group procedure, including a fixed time frame, which was 1.5 hours, and the formulation of the key questions to discuss. Facilitators were called upon to follow the instructions in the guidelines in order to ensure the greatest possible reduction in bias between the case study countries. As the guidelines were prepared in the English language, they had to be translated by the partners into each native language involved. After a short and standardized introduction about the aim and the procedure of the focus group discussion, consumers were asked to complete a focus group questionnaire about their socio-demographic characteristics and their wine consumption habits. After that, the focus group discussion began, focusing on the following nine key questions to discuss:

- On the basis of which criteria do you choose wine for everyday consumption?
- What does “good quality wine” mean in your opinion?
- What springs immediately to mind when you think about organic wine? Please consider aspects of wine grape production, wine making and wine quality.
- Which of the parameters presented would you associate with organic wine in a positive or a negative sense?
- Do you know about additives and processing aids used in wine processing?
- Which of these additives (with the exception of wood chips) and processing aids that are generally permitted in wine processing should be allowed or not allowed to be used in organic wine processing in your opinion? Please give reasons for your arguments.
- Please imagine which information you would wish to get from the label regarding the origin, processing and production of an organic wine when buying this sort of wine, and why?
- Do you think there are differences in the system of grape production for wine making and for table consumption respectively?
- Which differences do you expect to encounter between table grapes from organic farming compared with conventional table grapes?

Before going into the discussion about additives and processing aids, the facilitator provided a short introduction about a range of common additives and processing aids applied in conventional wine processing, as it was expected that consumers have too little knowledge of wine processing in general. This introduction included the following additives and processing aids:

- Sulphites
- Enzymes
- Selected yeasts
- Wood chips
- Food gelatine
- Selected bacteria

The additives and processing aids were chosen after consultation with organic wine processing experts. The choice was in line with current debates about which additives and processing aids should be allowed or be prohibited in the forthcoming EU Directive on organic wine processing. The emphasis here was on additives and processing aids, while consumers' perceptions about processing techniques were not investigated, as this would overtax them. In order to investigate the effectiveness of the guidelines and the clarity of the key questions, a pre-test was conducted in each case study country.

4.2.4 Equipment

One facilitator and one assistant were present at the FGDs. Facilitation was done by partners on the basis of the focus group guidelines prepared by FiBL, which included relevant technical advice and information about the role of the facilitator. Two voice recorders (and a camera), as well as an assistant, were to be provided for the FGD. The assistant was to write down the statements assigned to the respective participants.

4.3 Analysis

The analysis, which was a qualitative content analysis, was carried out in six steps:

Recording: All focus group interviews were recorded by tape recorders in order to provide a basis for transcribing the discussions*.

Transcription: The focus group discussions were transcribed sentence by sentence by each partner. Non-verbal communication was not considered in the transcription process.

Coding: In a third step, the focus group discussions were coded by each partner according to a codebook. This enabled the discussion to be structured into different themes.

Group specific theme analysis: After coding, an analysis of the specific issues that arose in each focus group was conducted by each partner.

Comprehensive theme analysis: The issue-related results of each focus group interview were compared in each case study country in order to identify differences and similarities between the (target) groups.

Cross country analysis: In a last step, the results of the case study countries were compared in order to identify differences and similarities between countries and target groups.

*In the French focus groups, the minutes were taken with detailed hand written notes.

5 Results of the focus group questionnaire

This chapter presents the results of the focus group questionnaire about socio-demographic characteristics and wine consumption habits of the participating consumers, which were investigated in a standardized questionnaire at the beginning of the focus group discussions.

5.1 Socio-demographic characteristics

The recruitment of consumers for the focus groups aimed at a broad distribution in terms of age, in order to achieve a more representative structure among the focus group participants.

Table 2 includes the age pattern in percentage terms for each case study country. The table shows that in each case study country at least four of the five defined age groups were present. Thus, this aim was fulfilled.

Table 2: Age distribution of focus group participants in percentage terms

Age	IT	FR	DE	CH
< 30	0	15	13	16
30-39	20	34	34	19
40-49	40	23	25	23
50-59	34	23	28	29
> 60	6	5	0	13

In addition to ensuring a broad age range among the focus group participants, it was also important that both men and women should be present in the focus group discussions. Table 3 shows that in each case study country each gender represented at least one third of the focus group participants.

Table 3: Gender distribution of focus group participants in percentage terms

Gender	IT	FR	DE	CH
Female	36	51	47	62
Male	64	49	53	38

The outcomes from the focus group questionnaire about the occupations of focus group participants show that most of them are employees or entrepreneurs (see Table 4).

Table 4: Occupation of focus group participants in percentage terms

Occupation	IT	FR	DE	CH
Student	0	3	6	4
Housewife/man	0	3	3	4
Manual worker	10	5	0	0
Employee	55	43	38	40
Entrepreneur	14	18	28	26
Civil servant	7	8	19	13
Others	14	20	6	13

5.2 Wine consumption habits

The following table shows the consumption frequency of consumers of organic wine compared with consumers of quality wine. Table 5 shows that the majority of both target groups consume wine at least once a week. The target group consisting of consumers of quality wine drinks wine more often than consumers of organic wine. In Italy and France, wine is a part of everyday consumption for more consumers than in Switzerland and Germany.

Table 5: Wine consumption frequency of consumers of quality wine (W) compared with consumers of organic wine (O) in percentage terms

Consumption	IT	FR	DE	CH
	W/O	W/O	W/O	W/O
Every day	83/52	15/21	0/0	0/10
Once a week	17/45	70/47	81/50	36/40
Several times a month	0/0	15/32	19/44	46/40
Once a month	0/3	0/0	0/6	18/10
Less than once a month	0/0	0/0	0/0	0/0

In Table 6, which contains information about the preferred origin of wine consumed, Italian consumers show a clear preference for wine from their own region; this applies even more to consumers of quality wine than to consumers of organic wine. In France, the link to the consumers' own region is less strong than in Italy; however, French consumers in both target groups prefer wines from their own country. In contrast to Italy, the link to one's own region is stronger among consumers of organic wine than among consumers of quality wine. Wines from overseas are not popular in either country. In Germany and Switzerland, a different picture emerges regarding preferences to do with the origin of wine. The majority of both target groups prefers wine from other European countries. Preferences are generally more diverse compared with Italy and France. Furthermore, wines from overseas are preferred by a considerable proportion of consumers. In Switzerland, wine form overseas are even more preferred than wines from the own country.

Table 6: Origin of wine consumed in percentage terms

Origin preferred	IT W/O	FR W/O	DE W/O	CH W/O
Region in own country	87/60	25/48	13/6	8/10
Own country	13/37	75/42	31/31	8/5
Other EU countries	0/3	0/0	37/44	59/61
Overseas	0/0	0/5	6/13	8/14
No preferences	0/0	0/5	13/6	17/10

Apart from the German quality wine consumers, most consumers stated a clear preference for red wines (see Table 7). This preference is stronger among the consumers of organic wine than among the consumers of quality wine in all countries except Italy.

Table 7: Type of wine preferred in percentage terms

Type of wine preferred	IT W/O	FR W/O	DE W/O	CH W/O
Red	87/80	85/90	47/61	64/84
White	13/20	5/5	47/33	18/5
Rosé	0/0	0/5	0/0	9/0
No preference	0/0	10/0	6/6	9/11

Consumers of quality wine in Italy do not like to buy wines in the supermarket or discount market (see Table 8). Instead, they prefer to purchase wines directly from the wine producer. Another preferred point of purchase is specialized off-license shops or wine shops. In France, consumers prefer to purchase wines in the supermarkets, in specialized off-license shops and directly from the producer. The same applies to German and Swiss consumers.

Table 8: Preferred point of purchase in percentage terms

Preferred point of purchase	IT W/O	FR W/O	DE W/O	CH W/O
Supermarket	0/21	25/36	23/39	33/29
Discount market	0/2	3/0	3/10	11/12
Specialized off-license shop	18/19	32/26	46/26	39/38
Organic shop	9/8	6/19	3/3	0/6
Wine producer	64/42	31/16	19/13	11/15
Internet shop	9/2	3/3	6/6	6/0

Regarding the most common price categories for wines for everyday consumption, Swiss consumers are prepared to pay higher prices for wines than consumers in other countries, while Italian consumers pay less for wine. Most French and German consumers are prepared to pay prices between 3.50 and 7.50 Euro. No clear trends can be observed between the target groups regarding the preferred price categories.

Table 9: Preferred wine prices for everyday consumption in percentage terms

Prices in €	IT W/O	FR W/O	DE W/O	CH W/O
< 2	4/30	5/5	0/0	0/0
2 – 3.49	29/18	15/5	0/20	0/0
3.50 – 4.99	52/24	30/48	29/35	8/10
5 – 7.49	7/12	40/26	42/30	51/29
7.50 – 9.99	4/6	0/11	12/10	8/47
10 - 20	4/12	5/5	17/5	33/14
> 20	n.a.	5/0	0/0	0

Prices deemed acceptable for special events are understandably higher than those considered acceptable for normal, everyday consumption. In all case study countries, most consumers are willing to pay between 10 and 20 Euro per bottle. More consumers of quality wine are willing to pay prices higher than 20 Euro compared with the target group of consumers of organic wine.

Table 10: Preferred wine prices for special events in percentage terms

Prices in €	IT W/O	FR W/O	DE W/O	CH W/O
< 2	4/0	0/0	0/0	0/0
2 – 3.49	0/7	0/0	0/0	0/0
3.50 – 4.99	19/13	5/0	0/5	0/0
5 – 7.49	33/7	20/16	30/25	0/0
7.50 – 9.99	4/27	20/26	30/25	17/26
10 - 20	41/47	35/48	45/35	50/59
> 20	n.a.*	20/11	15/0	33/16

*In the Italian questionnaire the price categories ended at >10 €, so last category did not apply!

Regarding the type of closure, consumers from both target groups prefer natural cork in three of the four case study countries (see Table 11).

Table 11: Preferred type of closure in percentage terms

Type of closure	IT W/O	FR W/O	DE W/O	CH W/O
Natural cork	n.a.	74/84	82/80	76/75
Synthetic stopper		26/11	6/20	8/15
Screw cap		0/5	6/0	8/10
Glass closure		0/0	0/0	0/0
No preferences		0/0	6/0	8/8

* not part of the Italian questionnaire

6 Results of the focus group discussions

In this chapter we present the results of the focus group discussions, starting with the criteria relevant for purchasing wine and wine quality criteria. After that, the focus is on the image and perception of organic wine among consumers regarding production, processing and quality. Section 6.4 includes the results concerning consumers' knowledge of the additives and processing aids used in conventional wine processing. We then present the consumers' perceptions of a specific set of processing aids and additives, with the aim of investigating whether they think the additives and processing aids could also be applied in organic wine processing. The outcomes of the discussion about labelling requirements in relation to organic wine are presented next. In the last two sections, the focus switches from perceptions of wine to perceptions of grape production and grape quality. Here, the emphasis is on differences between table grapes and grapes for wine processing and on differences between organic and conventional grapes.

6.1 Criteria relevant for consumers buying decision of wine

In this kick-off question, a large number of criteria relevant to the decision to purchase a particular wine were named. On the whole, similar criteria were mentioned in the four case study countries of Italy (IT), Germany (DE), France (FR) and Switzerland (CH). However, the relative importance of the different criteria varied between the countries. In some cases, differences were also identified between the target groups. An overview on tendencies of relevance of single buying criteria mentioned is provided in Table 12.

Table 12: General overview on buying criteria relevant for wine

Buying criterion	IT		FR		DE		CH	
	O	W	O	W	O	W	O	W
Geographical origin	✓✓	✓✓	✓	✓	✓	✓	✓✓	✓✓
Grape variety	✓✓	✓	✓	✓	✓	✓	(✓)	(✓)
Occasion	(✓)	(✓)	✓✓	✓✓	✓	✓	(✓)	(✓)
Taste	✓	✓	(✓)	(✓)	✓✓	✓✓	(✓)	(✓)
Variation	✓	✓	✓	✓	(✓)	(✓)	✓	✓
Type of wine	✓	✓	✓	✓	✓	✓	✓	✓
Reference, Advice, Recommendation	✓	✓	✓	✓	✓	✓	-	-
Point of purchase	✓✓	✓✓	✓	✓	✓	✓	-	-
Production system	(✓)	-	(✓)	-	nv	nv	(✓)	(✓)
Presentation	✓	✓	-	-	-	-	✓	-

✓✓ = very relevant; ✓ = mentioned; (✓) partly mentioned; - = not mentioned, nv = not available

6.1.1 Geographical origin as purchase criterion

In Italy and Switzerland, the purchase criterion mentioned most often by consumers of both target groups – consumers of organic wine (O) and consumers of quality wine (W) – was the geographical origin of the wine. In Italy, the geographical origin of the wine was stated by the majority of participants to be the main reason for choosing everyday wines as well as wines for special events. However, the focus was on both the country of origin and on the region of origin. Usually, wines produced within the same region of origin were preferred by consumers from both target groups who came from different regions of Italy. A consumer of organic wine stated:

"I'm from southern Italy, so my favourite wine is Aglianico" (IT, O)

Closely linked to the concept of regional origin is the notion of a direct relationship with wine producers, which seems to be important in Italy. Most participants expressed these two ideas together, as a single point. Even when choosing wines from different regions, personal knowledge of producers and wineries is a relevant purchase criterion.

In contrast to Italy, the focus in Switzerland was more on the country of origin, although preferred regions were also mentioned in a few cases. In three of the four focus groups, geographical origin was named by more than half the group participants. The most preferred origin was Italy, followed by Spain and France. Swiss wine is preferred by few consumers only. Some participants stated that they preferred it if wine were not transported over long distances, in order to save the environment, but they did not specify an acceptable distance.

"I tend to buy wine that has not been transported over too long distances, because of the harm to the environment." (CH, W)

Statements about food miles occurred only in the target group of consumers of organic wine and not in the quality wine consumer groups in Switzerland. However, a few consumers – from both target groups – also stated a preference for wine from overseas, namely from Australia and California. This shows that preferences regarding the country of origin are diverse. A desire for something different and a wish to discover new wines could play a certain role here.

In France, the geographical origin of wine is an important criterion but not the most relevant one. Quality wine consumers spoke of how their personal history provided criteria for choosing certain wines, as represented by the following statement:

"I like wines from my region that I buy from the producers with my father". (FR, W)

The idea of "terroir" is not clearly mentioned as a criterion for choice:

"I have no special criterion, I choose on the basis of gut feeling – I like discovering new terroirs" (FR, W).

The "terroir" concept is connected with geographical origin and a specific mode of production:

"I have my favourite regions. The origin of the wine is important to me, and whether it is produced by a real wine maker – all the better if it is organic" (FR, O)

The demand for specific "terroir" wines was not directly mentioned by any person in France.

6.1.2 Grape variety as a purchase criterion

Grape variety was another purchase criterion mentioned in all the case study countries, although it was a minor issue in all the countries except Italy. Specific grape varieties were mentioned in Italy, France and Germany. In the German focus groups these were Riesling or Shiraz. In Italy, grape variety was a more relevant aspect. It seems that several consumers of organic wine have their favourite varieties and take them into account when choosing wine for everyday use. No one in any of the quality wine consumer groups mentioned this aspect as a purchase criterion.

> *"I look at the label to find out about grape variety and origin when deciding on a wine" (IT, O)*

> *"The name of the grape variety is one of my motivations for buying a certain wine." (IT, O)*

Curiously, for one consumer of organic wine, grape variety represents a variable rather than a constant, as it does for the other target goup:

> *"If I drink a scented wine for a while, then I need a 'mineral' wine, because I can't drink the same type of wine all the time! If I drink a Pinot, I need to drink something else the next time." (IT, O)*

Most French focus group participants prefer German white wines, e.g. Riesling. For red wines, French consumers mentioned Spain and France most often as a preferred origin. If a variety was named specifically, it was usually in connection with its area of origin, especially in the quality wine groups, similar to the terroir concept:

> *"In the Côtes du Rhône, I love Syrah and white wines for their fining" (FR, W).*

Only one participant mentioned his favourite varieties for themselves:

> *"I like Cabernet and Merlot" (FR, O).*

6.1.3 The purpose of wine consumption as a purchase criterion

The main purchase criterion for the French participants in both target groups was the purpose associated with wine consumption. The choice of wine is related to the type of meal:

> *"The wine has to be appropriate for the dinner I'm preparing". (FR, W)*

The wine chosen must harmonize with the food. This depends on several criteria:

> *"The colour of the wine, the variety, the harvest year, as well as the appellation, all have to be right for my meal" (FR, O).*

Just as in France, German consumers often stated that they selected a wine according to the food they intend to eat, especially when friends are invited to dinner. In some cases, wine drinking is celebrated as a social event in Germany. In Italy and Switzerland, this issue was mentioned in only a few cases.

6.1.4 Taste as buying criterion

Good taste was the most relevant purchase criterion in the German focus groups, being mentioned by almost every participant. The following statement is representative:

> *"I would only buy organic wine again if it had a really good taste". (DE, W)*

Most consumers are looking for a fruity and dry wine, whether they are buying a red or a white wine. Some people only buy a certain wine if they have already tasted it at a wine shop or when visiting friends. In the experience of several participants, good taste is not

related to the price of a wine. They have been both disappointed and surprised about wines in every price category. This is in contrast to some Swiss consumers, who stated that price is a relevant purchase criterion as well as a reference for quality. In general, consumers' willingness to pay a certain price depends on the occasion they are buying for.

Several Italian consumers (both groups) cited taste as a criterion for buying wine (explaining that they need to taste a wine before purchasing it):

"When I buy from producers, I can taste the wine before I buy it, so I have more choice." (I, O)

6.1.5 Variation as buying criterion

French, Swiss and Italian consumers are also prepared to taste new wines. In Italy, curiosity for new products and a desire to taste different wines was revealed as an important motivation for the consumers consulted, especially from the Italian quality wine consumers group.

"[I choose wine based on] curiosity, I'm always looking for something new." (IT, W)

"I tend to choose wines that I don't know." (IT, W)

"At restaurants, I like to taste different wines than the usual ones I drink." (IT, W)

The aspect of variation was a minor relevant criterion in Germany.

6.1.6 Type of wine as a purchase criterion

The type of wine was another criterion mentioned in all countries. The focus group participants stated a demand for both red and white wines, while rosé was mentioned by only a few French and one Swiss consumer. In Italy, the participants showed a clear preference for wine typology and tend to buy the same one every time; of the different types, red wine was by far preferred by all the consumers consulted.

"I'm quite a consumer of habit; I tend always to buy the same kind of wine. I usually buy dry red wine." (IT, W)

"Usually I like full-bodied red wine." (IT, O)

"For everyday consumption I buy it directly from the producer; especially red wine – I drink wine every day." (IT, W)

In France, the individual preference depends on the season or on the food that goes with the wine. There is a slight tendency towards white wines during the summer and red wines during the winter.

6.1.7 Advice and recommendation as buying criterion

Another input for choosing wine is the advice (or reference) from producers, wine waiters (sommelier), wine traders, or acquaintances, perceived as "experts" to rely on by some Italian consumers.

"I taste wine in wine shops; I take the advice from a friend who owns a club, then I go to the producer or in a specialized wine shop to buy it." (IT, W)

For French consumers of organic wine in particular, recommendations are relevant to their choice of wine, especially when it is purchased in specialized wine shops. The promotional role of cellar shop retailers was emphasized, especially in the quality wine

consumer target groups, as was the role of the specialized wine press and the wine section in the newspapers. Some consumers, mostly from the organic wine consumer target groups, said they looked at which wines had won an award or a distinction and used this as a criterion for purchase. Most German participants considered recommendations from friends or sought advice in a specialized wine shop, like the French consumers, when buying wine.

The same applies to some of the Italian consumers in both target groups. Looking for recommendations on the internet was mentioned only once (DE). Many buying decisions are made spontaneously in the wine shop, especially after seller has made a particular recommendation. Several German focus group participants stated that they attended wine tasting events or wine fairs on a regular basis (e.g. VDP presentation in Berlin), in order to find a preferred wine. Wine consumed at a friend's house also provides a motivation for purchasing the same wine.

Same as in Germany, in Italy the influence of personal appreciation about wine taste seemed one important criterion used in wine choosing by all interviewed consumers. Several consumers choose wine after tasting it, either in wine shops or in wine cellars.

> *"I taste it, then decide [which one I prefer] and then buy it". (IT, O)*

> *"I look at grape variety and origin of wine; then I taste it to verify if I like the flavour." (IT, O)*

6.1.8 Point of purchase as a purchase criterion

The point of purchase seems to play a different role in each of the case study countries. In Italy, France and Germany, several comments were made in this regard, while it was not mentioned as a purchase criterion in the Swiss focus groups at this stage.

In France, participants appreciated purchasing their wine direct from the producers, especially if they lived near a wine production area:

> *"I purchase wine from the producers I know in the region my family comes from: Bourgogne, Beaujolais" (FR, W).*

The choice of point of purchase depends on the reasons why the wine is being bought:

> *"I buy wine in an off-license for everyday consumption, in wine shops for special occasions, and from the producers if I want to store wines capable of aging" (FR, W).*

In Germany the point of purchase varies from the supermarket (for everyday wines) and the wine store, through to a home wine service and, in some cases, even the Internet. Around Berlin (Germany) it seems to be common practice for a wine trader to visit consumers at home for free wine tasting. Many participants have already used this way of ordering wine. The advantage is that those who attend such an event enjoy a generous amount of wine tasting. The disadvantage, they say, are the large amounts one has to purchase (100 bottles a time) and sellers who phone every month asking for a new order. Smaller wine stores are frequented regularly and are generally appreciated because of the individualized advice one can get there. Some participants prefer to buy directly from a wine estate, either by mail delivery or while travelling. However, just because a person likes buying wine from a wine estate, it does not mean that they would not buy a bottle at the discount market from time to time.

In the Italian focus groups, the preferred point of purchase varied between the two target groups. However, the supermarket was rejected as a point of purchase by participants in both groups:

> *"I do not buy wine in supermarkets; I always try to buy it from local producers from the area where I am at the time. I prefer a direct relationship with the producer and the area." (IT, O)*

Some Italian quality wine consumers stated:

"For everyday use I go to a trustworthy producer." (IT, W) "I have some favourite producers and vineyards, mostly from my local area." (IT, W)

"In my opinion, a fundamental criterion is knowing a good winery." (IT, W)

A connection with wine producers also facilitates making a choice, as it is not usually possible to taste different wines before making a purchase:

"When I buy from producers, I can taste the wine before I buy it, so I have more choice." (IT, O)

As in Germany, the opportunity to taste a wine personally seemed to be one important criterion for making a choice for all the consumers consulted in Italy. Several consumers choose a wine after tasting it, either in wine shops or in wine cellars.

"I taste it, then I decide [which one I prefer] and then I buy it". (IT, O)

"I look at grape variety and the origin of the wine; then I taste it to check whether I like the flavour." (IT, O)

6.1.9 Production system as a purchase criterion

Factors related to grape production and processing were mentioned in only a few cases in CH, FR and DE in both target groups and in France only by consumers of organic wine:

"I mostly choose organic wines". (FR, O)

However, in all the Swiss discussions, at least one person named organic production as a relevant purchase criterion. It seems that some quality wine consumers also recognize organic wine as quality wine. In the Italian focus groups one participant said that she drank only organic wine because she thought it had a lower acidity.

6.1.10 Wine appearance and presentation as a purchase criterion

The appearance and presentation of wine bottles and labels is taken into account by some consumers from both target groups in Italy.

"The label is also important, it does influence me." (IT,O)

"Packaging definitely affects my choice." (IT,O)

"Normally one thing that attracts me is the picture on the label." (IT, W)

In Switzerland, the appearance of the bottle was mentioned by only one consumer as a purchase criterion:

"Before, I didn't know anything about wine. So I chose wine based on what the bottle looked like." (CH, O)

6.1.11 Other aspects

In the Swiss and Italian focus groups, two other criteria were mentioned, although they played only a minor role: the personal mood as a purchase criterion and the harvesting year.

"I buy wine according to my personal mood." (CH, W)

"I look at the harvesting year" (CH, O)

6.2 Quality criteria of wine

The quality criteria emphasized in the discussions varied between the different case study countries. To give an example, geographical origin as a sign of quality was discussed a great deal in Switzerland and France, while it was mentioned only briefly in Italy and not mentioned at all in the German focus groups.

In the Italian focus group, the concept of wine quality was one of the most debated points throughout all the groups. People tended to be reluctant to reveal their opinions, as quality was perceived to be an established concept, well coded by the experts. Most participants thought they were not sufficiently educated or knowledgeable to give their opinion about the issue. After the participants had given their personal opinions, the discussions proceeded. However, several participants, especially from the group of quality wine consumers, remained rigid in their position and identified their opinion on quality as being the same as commercial or industrial quality, which is not debatable and is defined by common protocols. The French focus groups focussed more on geographical origin and taste as a sign of quality. The topic of quality was barely discussed at all by the French participants. Although all 4 groups began with definitions based on the participants' personal experience in relation to taste or their perception of other wine characteristics, such as the pleasure experienced when consuming wine, the majority of the discussion was oriented towards objective criteria for the definition of quality:

> *"You need to distinguish between taste quality and institutional quality as stated on the label " (FR, W)*

Nevertheless, the definition of quality for a wine was recognized as a very complex concept, the participants making several suggestions regarding quality and quality attributes. Consistency was suggested as being a criterion for quality, although the final judgment rests with the drinker him or herself, based on the tasting experience:

> *"Quality wine is a wine I will look for again, even if I don't know the producer" (FR, W)*

> *"The Beaujolais Nouveau, whose quality doesn't change from one year to the next, is the epitome of a bad wine for me, because I don't like it" (FR, W)*

In the German focus groups the discussion about relevant quality criteria was focussed very much on product attributes, such as taste, salubriousness and price. In contrast to the Italian consumers, the German consumers felt they were capable of judging the quality of wine without being an expert. The focus on salubriousness was based on the negative experiences some consumers had previously had with wine. Getting a headache is considered a sign of bad wine quality as well as too much acidity.

In the Swiss focus groups, the discussion about quality criteria was congruent in part with the discussion about relevant purchase criteria. However, consumers went into greater detail to express their personal concept of quality. A wide range of quality attributes was mentioned in the discussion, as was also the case with the opening question about relevant purchase criteria.

A general overview on the quality criteria of wine discussed is provided in Table 13

Table 13: General overview on relevance of quality criteria

Quality criterion	IT		FR		DE		CH	
	O	W	O	W	O	W	O	W
Geographical origin (Country of origin, region of origin, terroir)	(✓)	(✓)	✓✓	✓✓	-	-	✓✓	✓✓
Production system	✓	✓	✓	✓	✓	✓	✓	✓
Wine processing	✓	✓✓	-	-	-	-	(✓)	(✓)
Taste	✓✓	✓✓	✓✓	✓✓	✓✓	✓✓	✓✓	✓✓
Pureness	✓	✓	✓	✓	(✓)	(✓)	✓✓	✓✓
Salubriousness/Healthiness	✓✓	✓✓	✓✓	✓✓	✓✓	✓✓	✓✓	✓✓
Presentation	-	-	✓	✓	(✓)	(✓)	✓	✓
Point of purchase	-	-	✓✓	✓✓	✓	✓	-	-
Price	-	✓	-	-	✓✓	✓✓	-	✓
Variety	✓	✓	-	-	-	-	(✓)	(✓)

✓✓ = very relevant; ✓ = mentioned; (✓) partly mentioned; - = not mentioned

6.2.1 Geographical origin as a criterion for quality

In France, one major quality criterion is geographical origin and the "terroir". The French AOC system is quite familiar to the consumers, who try to recognize the names of appellations on the labels.

In the Swiss focus groups, geographical origin as a quality criterion was often mentioned in discussions among the quality wine consumers in particular. For some consumers, the country of origin itself is a sign of quality. Some other consumers prefer to know the producer and the place where the wine was produced. For example, wine from Wallis (a famous Swiss wine production area in the Valais) is appealing to consumers because they have an image in their minds about the place where the wine was produced and they have certain experiences that are linked with the area, which can be concluded from the following statement:

> *"If wine is produced in Wallis, I can observe the whole production season. In the autumn I walk through the vineyards and try the grapes." (CH, W)*

The characteristics of a quality wine, which express its terroir properties, can change*:*

> *"Quality wine respects its terroir and has a particular aroma. Its taste is not standardized, like the American taste. The tastes must be different depending on the area where the wine was produced" (FR, O)*

The consumers admit that the quality of a wine that comes from a known area also depends on what the producer does to it:

> *"In the Muscadet area, the use of selected yeasts produces the same taste each year. This practise is not labelled, and I don't consider the products coming from here to be quality wines. For me, quality is diversity" (FR, O)*

The identity of a product and possession of a mental image of the place where it is produced is a relevant aspect in the context of origin, as represented by this statement:

"Another aspect related to quality is knowing the wine producer and visiting the winery. You can see if the producer likes his profession or if he's just involved in mass production. Also, having a "relationship" with the region is quite important, when you can imagine the place where the wine was produced while you are drinking it." (CH, W)

In Italy, this issue did not arise in the discussion about wine quality.

6.2.2 Production system as a criterion for quality

Issues related to the production system were discussed less than other issues in all the focus groups. However, it was mentioned in all the country groups. The following issues were raised:

In Italy, a few consumers mentioned viticulture as an issue affecting wine quality; this topic was discussed mainly by quality wine consumers.

"There is an objective aspect of wine quality which relies on technical issues, such as grape production, wine making" (I, O)

"When I go to a producer [to buy wine], I know which techniques they have used, including how they grow the grapes, and that's important to me." (I, W)

In France, the influence of the production system on wine quality was discussed:

"Quality depends on production methods and how the wine producer works" (FR, W).

Some participants have precise ideas on the subject:

"Quality depends on the production method: no pesticides in the vineyard, no additives during wine processing; organic production is best" (FR, W)

"Organic farming is better, because it respects the environment and the plants" (FR, W)

"When wine processing respects the vines and the grapes, and if no additives are used, the quality of the wine is better" (FR, O)

In Germany, the predominant difference between organic and conventional wine production is pesticide treatment:

"I think a wine can be distinguished quite especially by organic growing. Those producers grow wine without certain things and are controlled more strictly. It 's good to have independent controls" (DE, O).

In Switzerland, two predominant aspects are related to the production system: the size of the farm and pesticides treatment. Several consumers stated a dislike for wine from mass production using harvesting machines and pesticide treatments. In this context, organic wine has a positive image. It represents small scale production and production without pesticide treatments, as expressed in the following statement:

"From time to time I purchase organic wine (…) since I don't like mass production." (CH, W)

6.2.3 Wine processing as a criterion for quality

Wine processing, in addition to product attributes, was a key topic related to wine quality in the Italian focus groups, and especially in the groups of quality wine consumers. Quality and good taste are perceived by several consumers to be strictly correlated with correct wine processing. Wine making techniques are considered a fundamental influence on the quality of the final product:

> *"Quality means having precise organoleptic sensations; you feel them while you are drinking, and it means that the producer knows how to work in the field and in the cellar and that he or she is following certain criteria when managing the process." (IT, W)*

> *"I buy almost everything directly from the producers, who are from my own region or close by, and who I've known for years. I know which cultivation techniques and cellar procedures they use, and I think it's important. They make wines which don't contain any chemical additives; at most, they use physical treatments like cold techniques, etc." (IT, W)*

For the Italian organic consumers, though, the correct technique seems not to coincide with the one indicated by the group of quality wine consumers. For the former group, conventional and "industrial" wine making procedures may assure a "quality" wine in terms of commercial standards, but the wine could have a poor taste or could even be unhealthy, in their opinion.

> *"Quality is a matter of taste, but to some extent it is also a question of personal satisfaction. To me, a red wine like Aglianico gives me complete satisfaction." (IT, O)*

In the French and German focus groups, this issue was not part of the discussion about wine quality, and in Switzerland, only few statements occurred, in very general terms, about wine processing. It was stated that wine quality depends on "honest" processing. The outcome of such "honest processing" is pure wine, meaning that the wine is not adulterated. Solid technical know-how on the part of the wine processors was named by a few participants as important for good wine quality.

6.2.4 Product attributes as quality criteria

A relatively wide range of product attributes were mentioned in the Italian and Swiss focus groups. It was a central topic in the discussion about wine quality, while only few issues related to this topic came up in the French and German focus groups. In Italy, product characteristics appeared to be the first criterion cited by almost all the participants when they were asked to define wine quality. Product attributes were often mentioned by the group of quality wine consumers to describe wine quality, and were also relevant in the other target group. The quality attributes mentioned were alcohol content, wine purity, taste, salubriousness and healthiness of wines, and shelf-life.

Alcohol content

The issue of alcohol content was mentioned only in the Swiss focus groups. It was mentioned by only two consumers. One of them stated that alcohol content is a quality criterion, without specifying how alcohol content contributes to quality, while the other consumer prefers a lower alcohol content so that the wine is more salubrious.

Purity of wine

While little discussion occurred around the purity of wine in the Italian and German focus groups, it was an important topic in both Swiss target groups. Some consumers of organic wine stated that the purity of wine is related to the production system. For these people, organic wine is a sign of quality because it is expected to be purer than conventional wine:

> *"Purity and honest production methods are the main issues in good wine quality (…). It's getting harder and harder to find these kinds of wines. That's why I tend towards organic wine, which I trust more." (CH, O)*

In this context, one major problem facing consumers is the lack of information about ingredients, additives and processing aids, even though such declarations are common for food products and beverages. Wine is excluded from this duty of declaration, which was strongly criticized by several consumers.

In Italy, one consumer expressed an opinion negatively linked with the concept of purity as wine quality:

> *"A good wine that has a good flavour and which is expensive is not a genuine wine, it's much elaborated." (IT, O)*

The French focus group participants also discussed purity as a criterion for wine quality, suggesting that good quality wines are not adulterated by additives – the less technologically processed, the better the quality:

> *"A good quality wine should be the fruit of the vine, without too heavy fragrances or flavours hiding its real character; it should be easy" (FR, O)*

A contrasting viewpoint held that oenological practices are permissible as a way of boosting the quality of a wine if it is not a good year:

> *"The quality of the product varies through the years, possibly compensated for by technology" (FR, W).*

Nevertheless, transparency is considered important:

> *"My first criterion for quality is taste, but I also want to know how the wine is made" (FR, W)*

Taste

Taste was a central topic in those case study countries where consumers expressed their subjective preferences. Italian consumers linked quality with taste.

> *"To me a quality wine is a wine I like to drink." (IT, O)*

Individual preferences were also expressed:

> *"A wine that has a clear bouquet, is not too tannic, has a harmonious taste, no downsides; it should smell good and have traits that I like." (IT, O)*

Several consumers, though, linked the concept of personal appreciation with the presence of special traits:

> *"It (quality) depends on organoleptic traits and bouquet. A wine that has no specific characteristic is low quality. It should have clear characteristics." (IT, O)*

Participants' orientation towards a precise wine typology was fairly clear. Also, when asked what wine quality meant for them, several replied that a good quality wine should pertain to a certain typology. In both target groups by far the most preferred type of wine was red wine.

In France, the taste of wine is also linked to quality: the taste of wine was discussed in both target groups. Personal preferences were mentioned, for example:

"For me, quality red wine doesn't show its acidity; a quality white is not too dry, not too sweet" (FR, W)

"The wine is good in the mouth, not too sweet or heavy, not acidic; silky" (FR, O)

These preferences may differ from person to another, especially regarding the trait of dryness:

"Quality white or reddish wine should be very acidic." (FR, O).

Some consumers consider that taste is not enough to define the wine quality concept, for example when considering organic wines:

"I trust organic wines more for health than for taste: an organic wine is not corrupted, but it's not always better either" (FR, O).

In the German focus groups, taste was the most important quality criterion for wine. As in Italy, very concrete preferences were expressed: A good wine should have a strong taste, a good bouquet and should be dry or sometimes semi-dry. Almost everybody said that they do not like wines with a high acidity. A bitter and especially stringent aftertaste is not appreciated either. Whether a wine should be very dry or not too dry depends very much on the individual person.

"It (wine) should not taste sour. You can feel it right from the first sip, if it tastes 'rough'." DE, O).

"It must be smooth on the tongue and not burn" (DE, O).

"Red wine must be dry for me, but not too dry. But I'd rather prefer dry than semi-dry. I don't like sweet wine at all." (DE, O).

"Taste is the only thing that counts!" (DE, W)

In Switzerland, taste is a frequently named criterion in all the four groups. Alongside preferences regarding taste, such as "wine should not be too sour" or "smooth", some consumers stated that they like the individual taste of a wine with special character, one not mass produced. Participants also discussed the taste of organic wine. It emerged from these discussions that organic wine is not automatically tastier than conventional wine, and is therefore not a sign of quality where taste is concerned.

Salubriousness/Health

In Italy, Germany and France, the salubriousness of wine was another important topic. The concept of quality, together with taste, was also expressed in association with salubriousness. In Italy many consumers mentioned that a good wine should not be bad for health, or cause headaches or stomach problems.

"When I'm tasting wine, even if I'm no expert, I think I can tell whether or not it is a sophisticated wine. At least, I hope so." (IT, W)

"And also, the effect: if I drink a good wine I won't get stomach ache, a headache or digestive problems. In other words, it depends what they use [to make the wine]". (IT, W)

"Taste doesn't always coincide with quality. Once I drank a wine that had a great flavour, but the day after it gave me a headache and indigestion." (IT, W)

In France, several consumers in both target groups stated:

"A good quality wine doesn't cause headaches" (W);

After taste, salubriousness is the most important quality criterion for German consumers. Some mentioned that they suffered from a sensitive stomach as far as the acidity of a wine was concerned. Others mentioned getting headaches, which some related to the sweetness of a wine.

> *"I like dry wines, but it's important to me to sense that the wine is salubrious. If it causes a burning sensation in the stomach, it's not good. You have to watch out, especially with dry wines". (DE, O).*

The same goes for the Swiss consumers. The salubriousness of wine is a quality criterion named in both groups of quality wine consumers. Several consumers complained about headaches from the (over-)consumption of wine. Two consumers stated that organic wine is more salubrious than conventional wine, as represented by the following statement:

> *"If I drink too much wine, I get fewer problems from organic wine because it contains fewer harmful substances – pesticides, alcohol, acids and other substances (…) such as preservatives." (CH, O)*

Variety

Variety was mentioned only in the Italian and Swiss focus groups. In Italy, this less frequent concept of wine quality was cited by both target groups.

> *"I prefer a monovitigno wine [translator's note: from one variety only] – a DOC or DOCG wine". (IT, O)*

> *"I like the best varieties such as Cabernet or something like that". (IT, O)*

In Switzerland, the issue of variety as a criterion for quality occurred only in the two groups of quality wine consumers, but was not further specified.

Shelf-life

Just two participants in the Italian and one in the Swiss focus groups mentioned the issue of shelf-life while discussing wine quality. In Italy, one person from each target group mentioned the issue. Shelf-life was perceived as correlating with quality, although how this is the case was not specified.

> *"Some days ago I received a bottle of wine from Gemona [Friuli region] which was very good; maybe it didn't last long but it was good". (IT, W)*

In the Swiss focus groups, a few consumers assumed that organic wine has a shorter shelf-life than conventional wine. Other consumers contradicted this opinion by arguing that they did not notice any lack of quality when consuming organic wine after several years of storage.

6.2.5 Appearance, presentation and labelling as quality criterion

In France, aspects related to the appearance of the wine bottles were considered, especially the question of the bottles' closure. In this case, natural cork is considered to be a definite factor of quality.

In Germany, one person admitted basing their buying decisions on the label and the bottle from time to time.

In the Swiss focus groups, presentation was mentioned in three of the four focus groups. The presentation of wine is related to quality in the eyes of some consumers. One consumer protested that this did not apply to all wines in general; in the case of some Italian wines, for example, very simple presentation is not automatically associated with bad quality wine.

Surprisingly, only a few participants in one Swiss focus group mentioned awards for quality in this stage of the discussion. Consumers mentioned the awards "Grand Cru" and the "Gallo Nero".

6.2.6 Point of purchase as a sign of quality

The point of purchase was relevant in the French and German focus groups. In France, those consumers in particular who expressed considerable interest in wine stated that it is important to taste the wines in order to prove their quality:

> *"I like buying wines in cellar shops or directly from the producers, because you can taste them first". (FR, W)*

The direct connection between producer and consumer is considered to be a supporting criterion for quality:

> *"Taste is not enough; the quality of the wine depends a lot on the person who sells it and on their philosophy" (FR, W).*

In the German focus groups, another point of purchase is seen as a sign of quality: wine traders who deliver direct to households are expected to offer wines of higher quality than those offered in supermarkets.

> *"I only order from the wine trader, it's more salubrious than the wine from the supermarket." (DE, O).*

Again, an important factor is that consumers are able to try the wine before purchasing it.

6.2.7 Price as a quality criterion

In the Italian focus groups, the issue of price and its relation to quality was discussed only by quality wine consumers, although not very frequently.

> *"The ratio of price and quality could be a criterion; for instance, look at Tavernello wine [translator's note: a cheap table wine, in Tetra Pak bottles], that is very reasonably priced." (IT, W)*

In the German focus groups, some consumers stated that a certain quality of wine is related to a certain price level, and that good wine is not available for less than five or even 10 Euro. However, even good and expensive wines can be disappointing in quality and taste. In general, German consumers expressed their willingness to pay more for good quality, especially if they want to drink the wine with friends.

> *"Price is an important criterion for me. I don't think that you can get a good wine for less than 5 € - even 10 € is not enough for a really good wine". (DE, W)*

In Switzerland, price was mentioned only in the groups of quality wine consumers. As in Germany, price is an indicator of quality, and some people stated that a good Swiss wine is more costly than a good wine from elsewhere, for example, from Italy or from overseas. One consumer felt that although price is generally a criterion for quality surprisingly also – cheap wines are sometimes very tasty while expensive wines can be disappointing.

6.2.8 Harvesting year as a quality criterion

The harvesting year was mentioned in only the Italian and Swiss focus groups. It was discussed only in the two groups of quality wine consumers, without being further specified.

6.3 Perceptions and image of organic wine

In this chapter, perceptions and images of organic wine are described in terms of production, processing and quality.

In Italy, the discussion was focussed mainly on the production system (relating to grape cultivation) and wine processing, as well as healthiness. No clear associations were made, either in positive or negative terms, in relation to the issues of authenticity and the working conditions of vineyard labourers.

In France, the concept of organic wine is immediately associated with a different mode of production that is more respectful of nature and human health. Several participants in the groups had experience of consuming wines from organic farming and were able to detail their personal experience. Some others gave an "external" opinion.

> *"We will be less ill, and the earth too. Organic wine is produced without pesticides. It restores the real taste of wine, with nothing added" (FR, O)*

Few German participants knew anything about the term organic. They reasoned that they were not confronted with organic wine living in Berlin. In the German focus groups, the initial associations made with organic wine were: "no pesticides", "not treated", "no chemicals", "no poison", "expensive". When asked for details, some German participants realized that they didn't really know anything about the term organic.

In Switzerland, most consumers expressed positive associations with organic wine, although the negative images of organic wine were also discussed.

An overview on the image of organic wine is provided in Table 14.

Table 14: Image of organic wine regarding a choice of aspects related to production, processing, quality and other aspects

Image	IT		FR		DE		CH	
	O	W	O	W	O	W	O	W
Produced without pesticides	+	+	nv	nv	+	+	+	+
Pure and unadulterated product	o	o	o	o	o	o	+	+
Availability	-	nv	-	o	-	o	-/+	-/+
Taste	nv	-/o	-	-	-	-/+	-/o	-/o
Salubriousness/Healthiness	+	+	nm	+/o	-	+	+	+
Price-performance ratio	-	-	-	-	-	-	+	+/o
Trust	-/+	-	+	+	-/+	-/+	-/+	nm

+ = positive image; o = neither positive nor image; - = negative image; nm = not mentioned, nv = not available

6.3.1 Geographical origin

In the Italian focus groups, several associations were made between the concept of organic wine and the country of origin, especially by the group of quality wine consumers. For the organic wine consumers, organic wine should be correlated positively with its geographic area, creating a special "terroir".

"For me, it's impossible to imagine organic wine not being made from locally produced wine grapes in a specific area and not respecting its historical roots." (IT, O)

The target group of quality wine consumers expressed two different positions on this issue. A minority of them recognized this connection between organic wine and terroir, while for the majority this was not the case.

"[Organic wine] should be characterized by its link to a specific area." (IT, W)

"I don't think it's necessarily correlated to the area." (IT, W)

In contrast to the Italian focus groups, the relationship between organic wines and a specific approach to terroir was mentioned spontaneously by only one consumer in all the French groups. When asked about this subject, wine consumers gave contrasting answers: some quality wine consumers thought that organic wines cannot be produced in prestigious areas and are not connected with the terroir approach:

"I don't know if there is such a thing as organic Bordeaux". (FR, W)

By contrast, organic wine consumers stated that organic farming seems to allow for a better expression of terroir characteristics:

"Limited yields are positive for quality and terroir expression". (FR, O)

In the German focus groups, no comments were made regarding the origin or special terroir of organic wine.

In the Swiss focus groups, a set of different associations and perceptions related to the geographical origin of organic wine was identified. Issues related to this topic were discussed in only one of each target group, particularly in one of the quality wine consumer groups. The following points were mentioned in this regard: it was recommended that organic wine production should consider the environment of the vineyard and ensure that the wine grapes are not produced near power plants or conventional vineyards (danger of potential pesticide drift). For this reason, some of the consumers want to know the precise location of grape production. If wine is produced near major roads or industrial areas, it can no longer be considered organic. In addition, consumers did not want grapes to be transported over long distances to the wineries. The country of origin also plays a certain role: organic wine is associated with Swiss wine from small wineries, or at least from Europe, while wine from foreign countries, especially from overseas, is associated with mass production. Origin is linked with trust, as indicated by the following statement:

"Perhaps origin has to do with trust. If I buy organic wine, I look for the country of origin where I expect it to be produced in a healthy way." (CH, O)

Organic wine is not expected to come from overseas, as there is no trust in national regulations. Moreover, organic wine is not organic in the eyes of consumers if it is consumed in Europe, due to the food miles involved. Consumers expect organic wine to be local wine:

"A major part of the image of organic wine is that it is produced by your neighbour or by a winery nearby. If wine is produced in huge wineries like Foodland in America and offered

for sale at the COOP (one of the two leading retailers in Switzerland), it doesn't make sense." (CH, W)

In the other target group consisting of organic consumers, one participant expressed his surprise about an organic Spanish wine offered at a party which tasted very good. He described the wine as belonging to a higher price segment. However, this was an exception, because other consumers stated their preference for organic wine from an area close by, or at least from Switzerland. It is interesting that when Swiss consumers describe the quality and purchase criteria of wine in general, some of them do appreciate exotic wines from overseas, or at least from southern European countries. In contrast to this, the concept of organic wine is related to local or national production in Switzerland. Two reasons for this might be identified: consumers have more trust in national products, and low food miles are in line with environmentally-friendly production, which is related to organic production. German consumers also associate organic with national production.

6.3.2 Production

In the Italian focus groups, the system of organic production was one of the two most thoroughly debated topics in both groups, with the quality wine consumers group showing special interest in the issue. Organic cultivation of vineyards was perceived as being more natural by several people. Some expected a greater variety of wine to come from organic grapes – that it would be less standardized than conventionally grown wine.

"What I expect from organic wine is that it should be different from one year to the next, otherwise it's not organic." (IT, W)

Most statements occurring in this section were related to the production system of organic wine. It is expected to be produced "without chemicals at each stage", "entirely natural". It respects standards, is controlled by outside bodies and, finally, has a special label. This definition is shared by all the consumers, in both the organic and quality wine groups.

In the German focus groups, the participants' initial associations with organic wine were that it is not treated with chemical pesticides and that it is expensive. These remarks were mentioned spontaneously by almost all the participants, regardless of which group they belonged to. Furthermore, it was mentioned that organic agriculture was better for the soil, and that organic wine was not mixed.

"Not treated!" (DE, O)

"No pesticides!" (DE, O)

"In relation to other wines, organic wines are always more expensive" (DE, O)

"I'm thinking of pesticides and the artificial aroma, which isn't there [in organic wines]" (DE, O)

In the Swiss focus groups too, the participants' associations with organic wine were predominantly related to production and were almost entirely positive. The majority of participants believe that organic grapes are produced in a more environmentally friendly way than conventional grapes.

"You can assume that organic wine is produced without pesticides, ideally without copper too". (CH, W)

In addition, organic wine production is seen as a non-industrial, labour-intensive manual system of production. Several consumers stated that organic production has an impact on health, as represented by the following statement:

> *"I have a sense that organic wine is slightly healthier or at least less harmful than the others, because of pesticides." (CH, W)*

Thus, it can be assumed that large scale production is seen as being contradictory to authenticity and trust. Few consumers think that organic does not automatically mean small scale production. Some Swiss consumers in the target groups of quality wine consumers stated that they associated nothing with organic wine, because they had no experience of it. Oppositional associations were also mentioned. One participant argued that grapes treated with pesticides for disease protection are a positive factor. He argued that the quality of conventional and treated grapes is better than that of organic grapes, because treated grapes are healthier.

6.3.3 Processing

Processing, alongside production, was discussed at considerable length in the Italian focus groups. Attention concentrated on the use of natural or chemical substances in wine making, rather than techniques used. Italian consumers differentiated forcefully between organic grape cultivation and vinification. Some participants seemed to be aware that the organic cultivation method is different, while wine processing in cellars is not certified as organic. Regarding this topic, no significant differences were found between the two target groups.

> *"(…) Wine processing (organic and conventional) is the same everywhere." (IT, O)*

Some others were not aware of this distinction, as indicated by the following statement:

> *"Of course chemicals aren't used in the cultivation of grapes or in wine processing." (IT, W)*

Only few participants were aware of the current legislative situation regarding organic wine.

> *"It is correct to say that the product comes from organic agriculture rather than to say that it is organic; because there's no organic rule about wine processing, the second stage of production isn't certified." (IT, O)*

Mostly, perceptions of organic wine were linked with the absence of chemical additives or adulteration.

> *"[Organic wine] is definitely made without any chemical inputs in grape cultivation or wine processing." (IT, W)*

> *"Wine processing is done without additives or adulteration and is more likely to be in line with the natural and physiological evolution of wine." (IT, O)*

For one participant, organic wine was associated with a more artisanal mode of processing.

> *"[When I think about organic wine] I think of the processing procedure as a type of craftsmanship – you associate it more with a farmer than with a bottle of wine." (IT, O)*

Another participant thought that because there are no chemical substances added, organic wine needs more technology to preserve it.

> *"[Organic wine] in my opinion has a shorter shelf-life; I think it needs more technology than conventional wine, including in the cellar." (IT, O)*

Another person expressed the opinion that not all chemicals should be banned from organic wine processing. According to the consumers' opinion, some additives are necessary and, as long as they are not harmful to human health, they can be applied in organic wine processing.

> *"I don't think we have to take out every chemical, just the additives that are unhealthy. We shouldn't assume that everything added during wine making is bad for our health; there are things that can be replaced and others that can't." (IT, O)*

In one person's opinion, organic wine has no additives at all.

While a few consumers thought that organic wine is processed using nothing but grapes ("no sulphur added, spontaneous fermentation, under controlled standards and certification", FR, W), the majority of the French consumers admitted their lack of knowledge about what happens in the cellar. They recommended that the process should be detailed clearly in terms of standards:

> *"Certification dictates control. There are not necessarily any differences in the way the wine is processed or in the varieties that are used. At the end of the day, the wine is given a label" (FR, W).*

In the German focus groups, the processing of organic wine was only a minor issue in the discussion as a whole.

> *"Well, I suppose there's no purity law (German "Reinheitsgebot", a brewery law) for wine like there is for beer in Germany. You don't really know what's in the wine. You only find out the next morning when you have a headache" (DE, O).*

In Switzerland, organic wine processing is seen as a process that involves no use – or at least minimal use – of additives and extra ingredients.

> *"(Organic) production and processing means there is minimal use of additives. Wine processing is subject to certain rules. Besides this, the supply chain is probably more ecological. That's certainly an advantage of these (organic) products." (CH, W)*

Only one consumer named sugar as a specific ingredient they would not expect to be added to organic wine. The discussions indicated that there was a certain lack of knowledge about wine processing in general among the participants.

6.3.4 Availability of organic wine

In the Italian focus groups just a few comments were made about this topic, all of which pointed to the difficulties of finding organic wine in stores. It was mostly the organic consumers who mentioned this issue, with only one exception from the quality wine consumers group.

> *"Consumers aren't very familiar with organic wine; you don't find it in wine shops, and in supermarkets it's located in the organic products section, not in the wine section." (IT, W)*

In France, some organic wine consumers stated their preference for purchasing wine directly at exhibitions and fairs or from the producer's cellar:

> *"I trust the wine producers I buy from. If I don't know them, I use the "organic wines guide" (FR, W) [researcher's note: "le guide des vins bio", from Jean-Marc CARITE, well-known in France]*

The question of availability through other distribution channels was also discussed in the focus groups, with consideration given to supermarkets, cellar shops and organic shops:

> *"It is not easy to find organic wines in cellar shops, because the vendors don't display them at the front" (FR, W),*

Some consumers explained that organic wines cannot be found in supermarkets. Others asserted to the contrary that organic wines are indeed offered in supermarkets.

The participants' opinions on the performance of each distribution channel seemed to depend on the consumer's profile: members of the quality wine consumers target groups preferred cellar shops and were suspicious of organic shops:

"Organic shops don't know anything about wine" (FR, W)

"I use to buy organic apples there (in organic shops), but the wines they sell are not very good" (FR, W)

"In a cellar shop, the wine is quite always good. I don't risk buying wine in an organic shop" (FR, W)

"I want to stress the efforts that are made by the organic shops, like "la vie Claire" or "Naturalia" in their cellar" (FR, O)

None of the participants offered statements related to the availability of organic wine of their own accord. When asked, most consumers stated that organic wine is hardly ever available in the supermarkets. One woman said forcefully that she would like to have either a great selection of organic wines in the supermarket or nothing at all: just one organic wine among dozens of conventional wines would not be attractive to her. Another person pointed out that if there were more organic wine producers, availability would be much better. One consumer had seen an organic wine for the first time at Plus, a discount market that has its own organic trade mark. Another participant from the group of organic consumers said:

"I regularly buy things in an organic shop, but I never buy organic wine there". (DE, O)

In Switzerland, there was a heated discussion about the availability of organic wine. Some consumers said that they had no difficulties in purchasing organic wines, while others did not share this view at all. The different opinions are presented in the following abridged version of one discussion among quality wine consumers:

Consumer 1: "It's hard to find organic wine. COOP offers several organic wines. But there's no marketing of organic wine."

Consumer 2: "We've been drinking organic wine for more than 20 years. You just have to know where to get it, like in special wineries, for example. We've always kept ourselves informed about organic wine offers".

Consumer 3: "In Tirol, I've asked for organic wines on several occasions, but I've never been able to get any. Once I asked in a good specialized wine shop, but they didn't offer organic wine either. I was surprised about that." (CH, W)

In another discussion group (of quality wine consumers), one participant stated that it was easier to get organic wine in the countryside than in the towns. During the discussion process, in which other consumers contradicted this statement, it became clear that the first consumer had confused "organic" with "locally produced" wine. For this consumer, Swiss wine is automatically organic.

The most common points of purchase of organic wine named in the Swiss focus group discussions were "COOP" (second biggest supermarket chain in Switzerland) and "Delinat" (biggest organic wine trader in Switzerland).

"Availability isn't bad. Organic wine can be bought at the COOP and elsewhere, but it's difficult to get organic wine in specialized wine shops, even in famous wine shops." (CH, W)

Another quality wine consumer contradicted this with the following argument:

"The range of organic wine on offer at the COOP is not very big, and the wine is not very good either. It's relatively cheap and tastes that way too, I'm sorry to say." (CH, W)

Even organic consumers complained about the quality of organic wine on offer:

"It's a question of adapting to the taste of organic wine. If there was a good organic wine available I would consider buying it." (CH, O)

"I've never seen organic wine at wine fairs; so I suppose that the only good wines are conventional wines. I would like it if the COOP or the ExpoVina (wine fair) offered a bigger range of organic wines. I have the feeling that there's still not enough going on. The same applies to specialized wine shops and retailers. The question is, though, whether organic wines are labelled as organic or not." (CH, O)

Another source of organic wine is the Internet.

"There is an endless list of organic wines on offer on the internet. I found a source for ordering wine there". (CH, W)

Some consumers complained about the lack of information about organic wine at the point of sale. Consumers also stated that there is almost no advertising of organic wine.

6.3.5 Aspects related to organic wine ingredients

Generally speaking, only a few sentences were spoken about this issue during the sessions in all the case study countries. In Italy consumers did not associate organic wine with any ingredients in particular. They tended to disapprove of the presence of pesticides and other kinds of adulteration.

"I hope that there are no additives in organic wine – or maybe they use natural additives that are not used in conventional wine." (IT, W)

One participant associated some very precise traits with organic wine:

"I would expect organic wine to be full-bodied, something different from light wines; I would be suspicious if a light wine turned out to be organic." (IT, W)

In general, there was no significant difference in this perception between the two target groups.

In Germany, some consumers claimed that organic wine needs to have natural cork as a type of closure and would not accept a screw cap. Some people also thought that organic wine was not as stable during aging. They believed that organic white wines get darker in colour and tend to smell like vinegar after a certain period of storage at home, whereas conventional wines get better during aging. One person said:

"Wine is a natural product, and I don't want any preservatives included, even if it is conventionally produced. I expect organic wine to be really natural". (DE, W)

In France and Switzerland, no issues related to organic wine ingredients were mentioned.

6.3.6 Aspects related to taste

Issues to do with the taste of organic wine were debated quite frequently in the Italian focus groups, but almost exclusively by the wine consumers. Most of the opinions expressed by the participants were negative. Organic wine was judged to be of low organoleptic quality by most people, albeit with different levels of conviction.

"Some organic wines are awful, they give you stomach ache." (IT, W)

"From an organoleptic point of view, I haven't noticed anything particularly exciting about organic wines." (IT, W)

"I don't associate organic wine with organoleptic quality." (IT, W)

Some consumers did not agree with these statements, but they were in the minority.

"I've found organic wines to be very good, but I'm not able to judge the differences between them and conventional wines of the same quality." (IT, W)

Some of the Italian consumers said that they expected organic wines to have a more intensive taste. In contrast to this, others thought that taste depends on the variety or the vintage, but not on the production system (organic or not organic). Some people believe that organic wine has less acidity. For some people the taste of a wine is more important than its health aspects. One person stated that he had no experience of how organic wine tasted and therefore had no associations with it at all.

The taste issue was hotly debated in France. Some remarks were made about the taste of organic wines, most of which were related to negative experiences of tasting in the past. Other consumers referred to their experience of the high quality taste of organic wines. When asked specifically on the subject, these consumers gave more details, but only a few were able to explain on which points organic wines differ (or not) from conventional ones.

"Even if it is labelled organic, I want to buy good wines". (FR, O)

"Acidity is normal in wines, you need it. So it has nothing to do with whether the wine is organic or not" (FR, O)

"It's normal for the organic wines to be more acidic, because acidity comes form the soil and expresses the terroir" (FR, O)

In most cases, acidity is equated with sourness and is a negative criterion:

"I connect the idea of 'too acidic' with the presence of residues" (FR, O)

Some consumers acknowledged that they do not know exactly what effects organic grape production has of the sensory quality of wine:

"Cultivation is done without chemicals, on a soil prepared over several years. I don't know what it means for the wine itself. My experience of organic wines up to now has been disappointing" (FR, W)

In the German focus groups, the discussion about perceptions of taste of organic wine was livelier. Some consumers stated that organic wine is lower in acidity. Other participants stated it might have a better taste, while others again experienced organic wine as sour and having a bad taste.

"I think organic wine tastes sour" (DE)

"Whenever I've bought an organic wine once or twice in the past, it has really been free of additives. But it tasted like any other wine, although I can confirm that the alcohol content was higher. But I liked it because the wine had less acidity. It was from Baden (Germany)

and the price was only around 1,59 Euro higher, and the bottle was nice too. Also, it had a natural cork. I really liked that". (DE, W)

This statement was confirmed by a few participants. After experiencing organic wine once, they did not try it again because their experience was negative. Some participants had a more positive experience of organic wine, especially with German organic wine. Another person reported that she could taste no difference between non-organic and organic wine, except that organic wine was less acidic.

"Well, I have tried some organic wines, but I didn't notice any difference as far as taste is concerned. It was a white wine from Germany. But I thought that maybe it really doesn't contain any chemicals. I had a good feeling about that". (DE, W)

Another participant pointed out that "organic" has no additional value because, for him, the most important criterion for wine is taste.

"For me it doesn't have any additional value. The important thing for me is that the wine tastes good. It's not important whether the wine is organic or not. My experience of organic wine has not been good so far". (DE, O)

It can be assumed that the majority of the Swiss participants are not convinced about the sensory quality of organic wine. The production and processing qualities of organic wine are recognized as being better than those of conventional wines. However, several consumers are not satisfied with the sensory quality or else they perceive no sensory advantages of organic wine compared with conventional wine. Only few consumers appreciate the taste of organic wine. One woman, for example, stated that she had tried organic wine from time to time. At first she was disappointed, but now she is satisfied with the taste. Another participant stated a preference for the taste of organic wine, which was rather special and had a more diverse range, unlike mainstream wines.

"I like to try new things. Organic wine has more unexpected sensory breadth – sometimes in a positive sense, sometimes in a negative sense. I prefer this instead of choosing a standard wine from the shelf." (CH, O)

Other consumers expressed their dissatisfaction about the sensory quality of organic wine. The lack of shelf-life played a certain role here. The different opinions are expressed in the following dialogue, which occurred in one of the quality wine consumers groups:

Consumer 1 "In terms of the sensorial quality of organic wine, it hasn't got the same standard as conventional wine." (CH, W)

Consumer 2 "Organic wine tastes good on the first day, it gets worse on the second day, and by the third day you can only use it for cooking." (CH, W)

Consumer 1 "It has to be consumed quickly". (CH, W)

Consumer 2 "Yes, in fact, as soon as the bottle is opened. It can't be stored for longer than a month, maybe. Do you (other participants) have any experience with storing organic wine?" (CH, W)

Consumer 3 "It depends on the storage. I once stored an organic wine for more than 8 years and it wasn't a problem!" (CH, W)

Consumer 2 "Organic wine? I always worried that it would decay" (CH, W)

In another group (target group of quality wine consumers), one participant said:

"I never had a bad organic wine, and as you said, some conventional wine can also taste bad." (CH, W)

Consumers in different groups stated that organic wine was too sour.

Consumer 1: "One organic wine I drank had a disagreeable taste."

Consumer 2: "Yes, a strange taste, really sour".

Another participant said, in contrast to this, that the idea that organic wine tasted bad was a prejudice based on experience of early organic wines which had a poor taste.

"10-15 years ago I tried organic wine for the first time. Then I stopped drinking it for a long time. When I tried it again, I had the impression it had got better, and now I like drinking wine (CH, O).

6.3.7 Health/Salubriousness

As expected, several associations were made between organic wine and the issue of health in the Italian focus groups. Surprisingly, these were expressed more by the group of quality wine consumers than by organic consumers. Organic wine is considered to be healthier than conventional wine by all the participants who mentioned the topic.

"Theoretically [organic wine] doesn't give you a headache or stomach ache." (IT, W)

In the French focus groups, organic wines were generally considered to be positively related to the health of the environment and to have a positive or neutral impact on human health. Organic consumers are more aware on this subject. The main point concerning health was the low content of sulphites and "probably" pesticide residues.

For some members of the target groups of quality wine consumers, the positive impact of organic wines on their health is evident:

"It doesn't give you a headache", (FR W);

For others, the alcohol content remains the most important factor in the healthy impact of wine drinking, whether from organic grapes or not:

"There's no connection between organic wine drinking and health, because wine contains alcohol! The lack of pesticides could have a positive effect, but I don't feel any kind of difference" (FR, W).

In the German focus groups, the health aspect was stated only once by a participant in one of the groups of organic wine consumers. When the facilitator asked for a spontaneous response, most participants stated that organic wine was more salubrious and was healthier because it is not treated with chemicals or pesticides.

"Good for the health, in small amounts". (DE, W)

Moreover, organic wine does not cause headaches. One participant stated her willingness to pay a higher price if the wine really were healthier. Another consumer said that he would never consider wine as "healthy". Others contradicted this view, saying that only one glass per day of conventional red wine is considered to be healthy.

Several Swiss consumers consider organic wine to be a healthier product compared with conventional wine. Responsible for this is the positive image concerning the production and processing of the wine. According to the majority of consumers in both target groups, organic wine is acknowledged as being a healthier alternative compared with conventional wine. Some of the organic consumers believe that organic wine is produced without pesticides, which is assumed to impact adversely on health. However, another segment of the consumers put this argument in perspective by stating that wine is a healthy beverage in any case. In the more detailed discussion, wine was recognized as a healthy product on the one hand, while pesticide residues were considered to have a negative impact on the body and human health on the other. Therefore, consumers in both target groups expected organic wine to be healthier than conventional wine. One participant assumed that psychological components play an important part in the positive perception of organic wine regarding health.

> *"Probably, organic has a psychological component. An organic product is felt to be better and healthier". (CH, O)*

Another participant tried to find arguments for the positive perception of organic wine regarding health by stating that organic products have less of an impact on the body because they are pure products. By contrast, some participants stated that wine, no matter whether it is organic or conventional, is always healthy because some doctors recommend one glass a day. Another fear of Swiss consumers, beside the risk of pesticide residues, is the use of additives in wine production. For some consumers, organic wine is purer, while others do not see any difference between organic and conventional wine. One consumer argued that organic wine produced in an adequate climate and region is more organic compared to organic wine produced "in the wrong location". He assumes that if wine is produced under difficult conditions, producers will try to apply organic agents or pesticides, which would not help to produce a good organic quality wine in any case. Another consumer even said that they had fallen ill by drinking organic wine:

> *"When I drank organic wine, I had the feeling it wasn't good and, sure enough, I became ill from it." (CH, O)*

In one of both quality wine consumers groups, the aspect of salubriousness and health was only rarely discussed. Only one consumer thought that organic wine was healthy and salubrious, despite never having tried any. In the other group of quality wine consumers, the salubriousness and health aspects of organic wine were discussed in detail. Some quality wine consumers feel that organic wine is more salubrious because it causes fewer headaches. Others do not share this opinion. Some consumers believe that organic wine is less contaminated and includes fewer pesticide residues, which is a motivation for buying it. Several consumers had experienced pesticide treatments in practice and expressed their aversion to intensive use of pesticides. Besides this, they were not sure about the ingredients in the wine, as there is no list on the label. Thus, consumers prefer organic wine, which they assume is healthier because it is subject to more restrictions.

6.3.8 Price-performance ratio

This issue was a central discussion point in all the case study countries. However, perceptions of the price-performance ratio vary between the countries. In Italy, the perception was mainly negative, organic wine or products in general being expensive. Nevertheless, for one person this was considered fair, because the organic method requires a higher input of resources to succeed.

> *"[Organic] costs more because sometimes you need to cultivate 5 plants to harvest 1." (IT, W)*

Some quality wine consumers mentioned the concept in more ethical terms; they believed that organic products, including wine, should not be seen so much in terms of profit because of the overall positive impact that organic wine has on the environment and on public health.

In Germany, some consumers expressed a negative perception of the price-performance ratio. They argued that they could not perceive any positive sensory difference compared with conventional wine. It is surprising that even among the consumers of organic food, organic wine is not greatly appreciated by some people. In this case, taste is associated more with the variety and with other factors than with organic. In contrast to this, the taste of organic vegetables (tomatoes or strawberries, for example) is considered to be better than that of conventional products. Consumers also explained their unwillingness to buy organic wine by referring to their lack of trust. However, in general, German consumers stated that organic agriculture has to be more expensive than conventional because of lower yields. When asked specifically, some people stated

a willingness to buy organic wine if they could be sure that organic wine is healthier. Others doubted the benefits of organic wine.

In France, price was mentioned in a few cases, but more in relation to the higher costs of production than to the characteristics of organic wine itself. When consumers were asked again about the price-performance ratio, the answers given by the 2 target groups were quite different: the quality wine consumers thought that the price-performance ratio of organic wines is poor in terms of quality, while the organic consumers felt this was not the case. Some consumers in the former group stated that the high prices had a discouraging influence. “The price of my favourite organic Champagne has gone up from 15 to 22€. The price-performance ratio is very poor, even if the taste has improved.” Some negative views were stated: “How is it possible to produce good wine with untreated grapes?” asked a member of the Parisian wine group. “Why are organic wines more expensive if they don’t need expensive chemicals?” asks another Parisian, a member of the organic group. On this issue, consumers in Nantes, situated in a wine production area, display a better knowledge of the reality of viticulture.

> *“The organic label is a marketing ploy used to sell the product at a higher price. Is ORGANIC the right word?” (FR, W)*

Organic consumers seem more willing to accept higher prices. They recognize that organic products can be more expensive (“the prices are 30% higher because of the higher costs of labour, storage and distribution”) but balance that point with the positive consequences of organic farming for the environment and for human health. “I’m happy to pay a higher price now for not poisoning myself”. Nevertheless, the subject remains one of considerable debate, depending as much on personal history and self-image as on one’s knowledge about organic farming in general.

In Switzerland, perceptions of the price-performance ratio were discussed with great vigour. Negative and positive perceptions were expressed in both target groups, but positive statements predominated. Arguments explaining positive perceptions are: Price differences between organic and conventional wine are not so great, or else they do not exist at all; it is worth paying a higher price for organic wine because consumers associate added value or higher quality with organic wine. In this context it was stated that organic wine is “healthier”, “purer” or generally “more trustworthy” compared with conventional wine.

> *“I am willing to pay higher prices for organic products because I know that I’m feeding myself in a healthier way. What I don’t like is the misuse of the organic label. They (organic producers) create a label that says “natural” but it’s not really organic production. I’m paying more for the label than for the wine itself in cases like that. I would prefer to have a standard organic label, so that consumers don’t need to take on the costs for additional labour.” (CH, O)*

Another argument put forward was that organic farmers have additional work and take on extra risks, which justifies the higher prices. Besides, if wine is offered too cheaply, it is a sign of inferior quality. Other consumers criticized the price-performance ratio of organic wine. They showed a more focussed understanding of the price-performance ratio, mainly emphasizing the issue of taste. As they are not convinced by the taste of organic wine, they have a more negative perception of the price-performance ratio. Another reason given for a negative perception was the lack of trust in organic labels, or rather a lack of information about what the organic label means. Consumers see no added value here and so they have a more negative perception of the price-performance ratio. In addition, there was no knowledge or awareness of wine processing, not even among organic consumers. It is probably true to say that wine is only rarely mentioned in the media, in contrast to other topics, such as scandals over meat or egg production. Thus, consumers think there are no concrete risks associated with wine in general. This is indicated by the following statements:

"A good quality wine needs to be pure anyway, whether it is organic or non-organic". (CH, O)

Another point of view is that wine is a luxury article rather than a basic food. This means that consumers have no special health requirements with regard to this product:

"To me, wine is a luxury product. I look for good taste, so it doesn't matter to me whether the wine is organic or conventional. If it tastes good, I am prepared to pay a decent price." (CH, O)

The price of wines from overseas was also discussed, and it was generally considered

tain requirements need to be fulfilled before a product can be declared organic. However, it is not clear to consumers what exactly organic means in terms of wine. They require better consumer information from the organic associations/labels (the Swiss organic label "Knospe" was mentioned in this context) about the requirements and specific attributes of organic wines.

6.3.10 Authenticity

The topic of authenticity was not mentioned in Italy. In Germany, only few participants mentioned the issue. They said that organic can be recognized as such because it is labelled as organic wine. One woman spoke of the image that she associates with real organic wine: "old wooden vats and people stamping grapes in it with their feet". Some people believe that organic wine needs a natural cork, and they would not accept a screw cap.

In France, organic consumers talked more about respect for human and environmental health, while wine consumers talked more about the relationship between the wine and the winemaker, whose products are an expression of his philosophy of life. Differences in quality, or heterogeneity among the wines, are acknowledged as being an expression of this elevated relationship with changing nature.

> *"It is first and foremost an authentic product of the terroir, without facilities allowed by chemical processes. The wine grower's knowledge should balance out this handicap" (FR, O)*
>
> *"I admit that there are probably producers, even in well-known wine growing areas where organic is not an argument for selling more, who decide to convert to organic because they are courageous and confident in the future" (FR, W)*

6.3.11 Social aspects

This topic was mentioned only in Switzerland in this part of the discussion. A few consumers stated that organic wine production is associated with better social conditions for the labourers.

6.4 Consumer knowledge of wine ingredients, additives and processing aids in vinification

In a first step, consumers' knowledge about additives and wine processing aids was investigated in an open question without any prompting from the facilitators.

In all the focus groups there appeared to be a general lack of knowledge about wine making procedures. With very few exceptions, consumers – be they quality wine consumers or organic consumers – have little knowledge of wine ingredients, additives and processing aids in vinification.

In the Italian focus groups, consumers' general idea of how wine is made from grapes is somewhat romantic, linked to the artisan tradition, with no awareness of industrial or innovative techniques.

In France, consumers generally know about natural ingredients and sulphur. They associate wine processing with the idea of a "natural" process.

The German participants demonstrated that they have no detailed knowledge about wine production. When asked about wine ingredients or additives, the spontaneous response was: "sugar", "alcohol" and "sulphur". But these ingredients and additives were mentioned by only a few people.

In Switzerland too, knowledge about wine processing was poor, with some exceptions.

6.4.1 Additives (e.g. sulphites, organic acids)

Sugar was cited in each of the case study countries. In Italy, consumers wondered about when its use is allowed and complained that the addition of sugar is forbidden in Italy whereas it is allowed in France.

> *"In Italy, adding sugar is forbidden by law, while in France they use it to increase the alcohol content in wine. We use wines from Southern Italy to correct our wine." (IT, O)*

The general perception of added sugar was that it was a bad thing. Only a very few consumers in the French and Italian focus groups knew that wine can be enriched using concentrated grape musts.

In addition to sugar, another additive frequently cited was sulphites (IT, FR, DE and CH). Only a few consumers named further additives used in wine processing. However, acidity correctors (FR) or tannins (IT, FR, and CH) were named, as well as aromas (FR) and flavours (such as cinnamon, synthetic flavours, synthetic wine from overseas, CH), alcohol (FR, DE), water (DE), and acidity regulators (FR). Some outmoded practices are still present in consumers' minds, such as the use of beef blood (FR, CH) or glycol, recalling the scandal in the 1980s (DE), paraffin or antifreeze agents (CH).

One statement from a German participant shows the general lack of knowledge very well:

> *"I don't have any spontaneous idea (about additives and processing aids). Although I lived in Wiesbaden (which is near the famous wine growing area of Rheingau in Germany) during my professional training, I don't know anything. Nothing at all "(DE, W).*

6.4.2 Cultures (e.g. bacteria, yeasts)

Yeasts were mentioned in all the case study countries; however, only few consumers knew that they are used in wine processing. Bacteria, which are also commonly used in wine processing, were mentioned only in the Swiss focus groups.

6.4.3 Processing aids (e.g. clarifiers e.g., bentonites; stabilizers e.g. sulphites, enzymes)

The most popular processing aid is wood chips (IT, FR, DE and CH). Some consumers also mentioned gelatine (FR), ovalbumine (FR), gas to process sparkling wines (FR), clarifiers (IT), Bentonite (IT), citric acids (DE), cranberry juice (DE), and ascorbic acid (DE). Also mentioned were sugar (CH), sulphites (CH), bacteria (CH), cinnamon (CH), synthetic flavours (CH), tannins (from wooden barrels) (CH), paraffin (CH), and anti-freeze agents (CH). In one of the Swiss quality wine consumers groups, one consumer was disgusted that US wine is produced by applying aromas and that the wine is synthetically produced. He argued further that it is difficult for consumers to identify such wines by taste.

6.5 Perception of selected additives and processing aids used in vinification

In this section, a brief introduction into the practice of wine processing was provided by the facilitators, with an emphasis on the following single additives and processing aids commonly applied in conventional wine processing:

- Sulphites
- Enzymes
- Selected yeasts
- Wood chips
- Food gelatine
- Selected bacteria

After the introduction, consumers were asked whether these additives and processing aids could also fit the concept of organic wine or whether they should be rejected.

In general, consumers in all the case study countries had difficulties at this stage of the discussion because they did not consider themselves capable of discriminating between one additive and another in order to decide whether it could be used in organic wine making or should be prohibited. In some focus groups (IT, DE and CH) the participants needed additional information about the necessity and consequences of each listed processing aid or additive in order to make their own decision.

> *"I can't answer this question very easily" (DE, W)*

Even after having been given some additional explanations, some consumers were not convinced (IT), and in some cases they refused to offer a judgement (IT). It seems that the topic was too technical to be debated by consumers who are or who feel unprepared. The most frequent response was that they trust the experts to tell them if a substance should or should not be allowed in organic wine making (IT, CH).

> *"As far as most of these substances are concerned, I'm simply following my instincts as to whether they're dangerous or not. So I can't really give an answer." (IT, W)*

In general, no clear preferences were expressed in the debate around particular additives or processing aids, as almost every participant gave a personal point of view, with a wide spectrum of responses (IT, FR, DE, CH). When choosing what to ban and what

The spectrum of arguments from the discussion about the acceptance of additives and processing aids are summarized in Table 15.

6.5.1 Sulphites

The discussion about sulphites was controversial; both arguments for and against the use of sulphites in organic viticulture (OV) were stated in all case study countries. Sulphites were the additive most discussed by the consumers (except in the German focus groups). The majority of the participants rejected sulphites because they were considered to be harmful and unhealthy (IT, FR, DE, and CH).

"I don't want sulphites in wine, they cause headaches." (IT, O)

"I don't want any sulphur, sulphur sounds unhealthy". (DE, O)

"I don't think it should be used because I have the feeling that I get headaches from sulphites. Some time ago I asked someone else and heard that a lot of people show the same reactions. So organic wine should be produced without sulphites" (CH, W)

Another reason for the rejection mentioned in the German and Swiss focus groups is the negative effect of sulphites on taste and smell.

"When I think of sulphur I think of a strange smell". (DE, O)

"I have very strong concerns about sulphites. You can taste them in the wine, and besides that, I get a headache from them". (CH, W)

Although consumers rejected the use of sulphites, they expressed a variety of potential measures. Some fearful consumers called for a ban on sulphites in organic wine processing (IT, FR, CH). Others stated that organic wine processing could not do without sulphites, because it is necessary in wine processing, for creating a good quality wine, and would discriminate against organic wine processors (IT, FR, CH).

"I don't like sulphites, but we need them, otherwise we risk losing the product for a few years." (IT, W)

"I recently read that no alternative has yet been found to replace sulphites in wine production. I know that small quantities of sulphites are used in organic associations." (CH, O)

In Germany, by contrast, little awareness about sulphites appeared to exist. Only three consumers stated that sulphur caused headaches. Two other consumers, by contrast, stated that sulphur should be allowed, as it gets rid of all micro-organisms in the wine and is not harmful to health.

Few consumers (IT, FR, DE, CH) stated that they have no concerns about sulphites. Some of them asked about the origin of sulphites (IT, CH), and whether they are a natural product. If so, they would accept sulphites in organic wine production.

"I have no problem with sulphites as long as they contribute to a good wine. As far as organic wine is concerned, I think it is important that the additives are also organic and that only as much are used as is necessary." (CH, O)

"Sulphites are less dangerous as antioxidants (than other things to be added), if you are worried about allergenic reactions". (FR, W)

"I have seen that sulphur is included on the label of the bottle. I looked it up on the Internet. They say it has to be in the wine". "(DE, O)

"Well, if it is necessary to make good wine…" (DE, O).

Consumer 1: "Are they (sulphites) a natural acid? If so, they should probably be allowed in organic wine processing. But are they healthy? Sulphites probably undergo catabolism by the organism, so they can be allowed. (CH, W)

Consumer 2: "Perhaps a distinction should be made between natural and synthetic sulphites." (CH, W)

Some other consumers called for threshold values and for procedures to be permitted only if they are absolutely necessary.

6.5.2 Enzymes

The discussion about enzymes was also very lively. In the Italian focus groups, some consumers from both target groups would accept enzymes, since they consider them to be natural and harmless.

"Personally, I think that substances of natural origin, such as enzymes, bacteria, yeasts and must, should be acceptable." (IT, O)

6.5.3 Selected yeasts

When comparing the outcomes from the four case study countries, a number of differences were identified. While consumers in Italy and France had concerns about using selected yeasts in organic wine processing, there were no concerns in Germany and Switzerland, other than from two consumers in Switzerland who were afraid of yeast allergies, and another who claimed that these yeasts should be of natural origin and not genetically modified. By contrast, some consumers in France and Italy expressed no concerns as long as the yeasts are of natural origin, while the others stated that selected yeasts had a negative impact on wine quality. In Italy, participants stated that selected yeasts affect the organoleptic traits of wine, making it lose its peculiarity and its link to terroir. In France this issue was considered by only a few participants in the organic groups. The majority of the quality wine consumers were against the use of selected yeasts in organic wine processing, due to the risk of standardizing the wines and impairing their authenticity:

> *"Selected yeasts aren't part of the natural micro-flora of grapes. Their use runs counter to organic farming philosophy". (FR, W)*

Selected yeasts are accepted by Swiss consumers.

6.5.4 Wood chips

This topic was largely discussed in the Italian and Swiss focus groups, probably due to its current relevance and emphasis in the media. However, when comparing the results from the case study countries, differences were identified again between the countries.

In the Italian focus groups, all the participants from both target groups agreed on the same position about wood chips, namely that they affect the flavour of the wine in an underhand way; this was perceived as a kind of fraud.

> *"Wood chips should be banned in organic and conventional wine alike. It's a fraud." (IT, O)*

One organic consumer also raised a question on food safety:

> *"Organic products should guarantee greater food safety. These wood chips come from industrial wood processing plants, so how can we be sure that the wood isn't treated with harmful substances?" (IT, O)*

Differences emerged between the target groups in France. The quality wine consumers were generally open to the question of using wood chips; some expressed their preference for the oak taste, while some remarked that chips are natural and less expensive than barrels; however, they also considered the consequences their use could have for the character and authenticity of wine.

In contrast to this, all the French organic consumers were against the use of wood chips in organic wine processing. Their main argument was that it changed the nature of the product (wine) and compromised its authenticity:

> *"If wood chips are used in organic wines, why not allow the addition of aromas?" (FR; O)*

They underscored the risk of a progressive adulteration of the idea of wine and wanted consumers to be more clearly informed about organic wine processing.

In the German focus groups, this issue was also the subject of lively debate, although few differences were apparent between the target groups. Generally, wood chips were accepted by most participants, even though they influence taste. Some consumers stated that wood chips are equivalent to wooden barrels – they have the same effect on the taste of the wine. Other participants thought that wood chips were an appropriate

way of preventing price increases for organic wine. They argued that a considerable range of cheaper wines from South Africa and Australia have entered the German wine market.

> *"Wood is not unhealthy. We have to offer something that can compete against all the wines from South Africa and Australia. And it is a taste that is very much in demand; I think it's an appropriate way of avoiding higher prices for organic wine especially" (DE, W)*

Another consumer stated that her rejection of wood chips was based on the loss of authenticity. In her view, only wooden barrels give the traditional feeling for how wine should be stored. The use of chips is a way of cheating consumers, as wines treated with wood chips pretend to be wines aged in wooden barrels.

> *"I see wood chips as negative. They fake storage in wooden barrels". (DE, W)*

In the Swiss focus groups, this topic was also discussed vigorously. Overall, the pros and cons were expressed in all four group discussions. On the one hand, consumers argued that if wood chips are naturally produced and not treated with chemicals and aromas, they are harmless; they have no negative impact on health and improve the sensory quality of the wine. Other consumers, on the other hand, stated very clearly that they do not accept wood chips in organic wine processing. The reasons for this are that wood chips are related to mass production; they are a form of cheating and, if used in organic wine production, lead to a loss of authenticity.

> *"I associate wood chips with mass production. Organic wine should be stored in wooden barrels or not [be declared organic]" (CH, W)*

Furthermore, doubts were expressed as to whether wood chips produce a taste as good as wine stored in wooden barrels. Some consumers called for the declaration of wood chips.

6.5.5 Food gelatine

In the Italian focus group discussions, different opinions emerged between the target groups. While some organic consumers saw gelatine as a natural substance and would therefore allow them in organic wine making, others reject them (albeit they were defending the position of no additives or processing aids at all). In the group of quality wine drinkers all the participants were against its use in organic wine processing for a variety of reasons. Firstly, gelatine is not considered natural or safe. Secondly, it causes a change in the flavour of the wine and is therefore not acceptable.

> *"I don't want gelatine to be used. I don't know where it comes from, or even if it's from plants." (IT, W)*

In France, all consumers who made comments about gelatine were against its use, especially if it is from animal origin.

In Germany, controversial opinions were voiced in the focus groups. Gelatine was considered by the majority of consumers to be a bad thing. One consumer stated that food gelatine was acceptable, because it is a natural product. Others interrupted, because gelatine is an animal product.

> *"Gelatine is from animals, and that makes me feel uneasy about it". (DE, O)*

Consumers were surprised that gelatine was involved in wine production.

In Switzerland, the topic was discussed intensely, especially in one of the quality wine consumers groups. Intuitively, most consumers rejected gelatine in organic wine production. They were concerned because it is an animal product and they would prefer vegetarian gelatine for organic wine processing.

"I personally would prefer agar-agar or something else instead of gelatine of animal origin". (CH, O)

"I don't want it (gelatine). I don't know exactly why, but there are a lot of things in gelatine. I just deleted gelatine besides a few other food ingredients." (CH, W)

"I associate gelatine with an animal product." (CH, W)

Some wanted the use of gelatine to be declared and for it to be subject to limited application. Others had no concerns and argued that organic wine producers should not face too many restrictions.

6.5.6 Selected bacteria

Selected bacteria was a minor topic of discussion in all the focus groups, and the results from the case study countries vary greatly.

In the Italian focus groups bacteria, like selected yeasts, were considered natural by some organic consumers and therefore acceptable. But for other organic consumers, and especially for quality wine consumers, they are not tolerable because of their negative influence on wine naturalness and taste.

In France, the subject of selected bacteria was barely considered at all. They were seen as belonging to the same type of practices as the use of enzymes. In each case, their use is considered a bad thing.

In the German focus groups, several participants mentioned that they have no idea what selected bacteria might be and that they could not judge them.

In Switzerland, the issue of selected bacteria took up only a small part of the discussion. In contrast to French consumers, Swiss consumers have a positive view of selected bacteria. Bacteria have a positive and healthy image. Consumers made parallels to bacteria in yoghurt, where these bacteria are highlighted as healthy cultures. In this respect, the media seam to have an influence on the positive perception of selected bacteria among consumers. One consumer annoted that selected bacteria could be genetically modified.

6.6 Labelling requirements for organic wine

6.6.1 Geographical origin

Consumers in all the case study countries appreciated having information about the origin of wine on the label, as this is one of the most important purchase criteria for them. In Italy, France and Switzerland, some consumers stated that they would appreciate information about the "terroir". One Italian consumer was unsatisfied because he read on a bottle: "Processed in Italy, produced in Poland." This separation of production and processing was perceived negatively. Similarly, one Swiss consumer stated that the production and processing of wine should occur in the same place. In France, interestingly, many participants associated organic with Germany as a point of origin. German and Swiss consumers also associate organic wine with "produced in the own country". Geographical origin is one of the reasons for choosing a wine, as indicated in the previous section on relevant criteria for buying a wine. Thus, the labelling of organic wines should include the origin, but should not be limited to the information currently given on wine labels:

"I would appreciate qualitative information which I can't find on other bottles" (FR, O).

6.6.2 Labels and information about the labelling programme

Generally, consumers called for more information about what exactly the organic label stands for. In Italy, one consumer commented that in order to explain better how organic wine is or will be made, a specific communication campaign would be more useful.

"The (organic) label is important, but without a clear publicity campaign consumers won't understand it." (IT, O)

In France some participants called for a quality label or an organic label or a certificate that has a clear definition. There should also be a label from an independent institute. One participant stated:

"A greater number of European organic regulations would create more trust than the word organic". (FR, O)

When drinking French wine, for example, it would be important to have a European label. By contrast, other consumers did not really trust simple organic labels:

"What is needed is an international norm, with a clear meaning" (FR, W).

It was suggested that the label should be confirmed by an independent institute. One participant stated:

"Information about certification is enough, because it is made on the base of known standards" (FR, W)

A specific logo was also recommended:

"If there is organic wine processing, then have a logo!" (FR, W)

Both participants of the target groups focused on the additional information to be written on organic wine labels:

"To correct the perception of sadness attached to organic wines, you should write upbeat messages on the label". (FR, W)

"Base the information on what you don't find in organic wines" (FR, O).

Transparency is also desirable, according to several participants, as proof of trust, but this concept has to be dealt with carefully, both for pedagogical and competitive reasons:

"Labelling is fine if it is done on all wines. The information should be focused on what is not added into organic wines" (FR, O).

In the German focus groups, most of the comments about labelling included a requirement for a clear label and information concerning its underlying criteria.

"I want to know why it is organic, what it means". (DE, W)

The same goes for the Swiss consumers, who asked the facilitator where they could find the cellar regulations of the Swiss organic label (Knospe). One Swiss consumer stated that if the Swiss organic label were on a bottle, she would not be interested in buying it, especially if the wine was to be a present for friends.

"Especially when I go shopping at the COOP, I sometimes dislike it when wine is visibly declared as organic. If I want to give wine as a present, it's can be a pain when COOP organic wine is written on the bottle. I would like to give organic wine as a present, but not when it is obviously declared as organic wine." (CH, O)

This statement shows again that organic wine sometimes has a negative reputation, even in the eyes of organic consumers.

6.6.3 Amount of information

Most consumers in the case study countries called for more information about organic wine, as there is a general lack of information about the production and processing of organic wine. However, different suggestions emerged regarding the amount of information that is appropriate:

1) Complete list of ingredients, additives and processing aids, as well as relevant methods, to appear on the label;
2) Reduced list with the labelling of a selection of additives and processing techniques;
3) Declaration of those substances not used in production or processing;
4) No declaration, but the organic label to stand for unambiguous cellar regulations.

In Italy, suggestions were made about how to communicate to consumers the different processing methods between 'future' organic wine (within the new regulatory framework) and conventional wine. Positions on this issue differed, mainly in line with those reported at the beginning of the section (detailed information vs. minimum data on the label).

Some French, German and Swiss consumers wanted a list of ingredients. German consumers pointed out that this is especially important for people who suffer from allergies. Even more information was required by French consumers: they called for transparent information on oenological practices, especially regarding the nature of additives and oenological processes. In contrast to this, one German consumer stated that even a list of ingredients would not help him, because he has no knowledge in this area.

"It would be helpful to find a scale on the label that gives information about the taste. I mean if the wine is dry, semi-dry or sweet" (DE, W).

As an alternative to a complete list of additives, a reduced list of additives was suggested – or vice versa – in order to provide information on what was not used in organic wine production compared with conventional wine production. Swiss consumers in particular did not generally want to be overloaded with information. They generally trust the Swiss organic label (Knospe). Several consumers stated that they would like a minimum of information, including information about consumption and the kind of food for which

the wine provides the best accompaniment, the consumption temperature, and a minimum of information about the mode of production and processing.

Unexpectedly, only few consumers called for a declaration of individual substances. They argued that too much information would not reach consumers, as they are not willing to read it. Besides this, they argued that wine additives, techniques and processing aids are largely unknown to lay people. However, in the previous discussion about wine processing additives and processing aids, consumers definitely wanted a declaration of wood chips and sulphites.

Some German consumers wanted to have information such as: “no chemicals added” or “only natural ingredients”. For some people, it was very important to know what was *not* used during the production process of the wine. German consumers in particular wanted clear reasons why organic wine is “better” and why they should pay an additional price for organic wines.

Additional leaflets containing detailed information about organic wine production and processing and the way it differs from conventional wine were suggested by Italian, French and Swiss focus group participants.

> *“On organic wine bottles I would like something else on the label, something attached to the bottle, like a brochure, where the production method and guidelines are explained (private label); also, where differences between conventional and organic wine processing are pointed out, so that consumers can choose whether they want to spend a little bit more for the organic product, because they know why.” (IT, O)*

For some French same as for Swiss consumers, a specific logo associated with standards monitoring would be enough, as long as there was not too much written information on the labels themselves. They also argued that consumers are over-informed and that they would not be able to make a judgment about the ingredients anyway, due to a general lack of knowledge about wine processing.

An innovative information medium besides leaflets, suggested by Swiss and German consumers, is the Internet. They would appreciate having a control number on the bottle that enables consumers to find a complete list of declared ingredients or information about the production and processing of the respective wine on the Internet.

Another aspect was that the word “organic” itself seems to have a negative image for some consumers, as the following statement indicates:

> *“If you do not explain what organic means, the word can have a negative effect in the consumer’s mind”. (FR, W)*

6.6.4 Expiry date / shelf-life

Very few comments were made on this topic, and only in France and Switzerland. In France, one person assumed that even organic wine must contain some preservatives. In Switzerland, one consumer required information about the expiry date on the label.

6.6.5 Advice for consumption

In Italy, no comments were made regarding this topic. In France, Germany and Switzerland, a few comments were made on this subject; they concerned the temperature at which wine should be stored and consumed, as well as advice on the best match of food and wine.

> *"Mentioning the best temperature at which the wine should be drunk is one way for the producer to convey his personal involvement in the processing of the product. It also shows a respectful attitude towards the wine". (FR, O)*

Some German consumers appreciate information about the harvesting year and the specific taste of a wine. In addition, the degree of sweetness should be indicated, e.g. by means of a scale on the bottle.

6.6.6 Other aspects

Swiss consumers called for organic regulations that ensured that wine production and processing occurred in a way that it is not harmful to consumers. If (harmful) additives are used, such as sulphites or sugar, organic wine should have limiting values for such harmful substances much lower than in conventional wine production. Consumers wanted the commission responsible for the development of regulatory procedures to include medical doctors and consumer protection experts.

6.7 Perception of differences between grapes for vinification and grapes for consumption

In the Italian focus groups, participants seemed to be confused about spotting differences between table and wine grapes. The most frequent comments made were in relation to the production area, cultivars and pesticide treatments. Nevertheless, only a small percentage of participants made any comments at all; most of them simply didn't know and didn't answer the question.

6.7.1 Growing area / "terroir"

Some Italian consumers from both target groups associated table grapes and grapes for wine production with different growing areas.

> *"Table grapes are cultivated in central or southern Italy, where climatic conditions are different." (IT, O)*

In France, no comments were made in relation to the growing area. German and Swiss consumers stated that table grapes certainly needed a warmer climate and more exposure to the sun than grapes for wine production. Also, participants assumed that different soils were needed for each type, without specifying what these differences might be.

6.7.2 Grape variety (skin, size, seeds)

Differences in variety between table and wine grapes were discussed more than differences in the growing area and were mentioned in all the case study countries.

> *"There are probably the same differences for table grapes as for wine grapes: the organic mode of production is more natural" (FR, W)*

In addition, differences in size and seeds were mentioned (seedless table grapes) in the Swiss and German focus groups. Table grapes were thought to be much bigger than wine grapes in Switzerland. Some consumers believed that they were treated with a lot of pesticides and were "over"-cultivated. One major difference frequently mentioned was that table grapes have no seeds.

> *"Table grapes are juicy, big, shiny and somehow over-cultivated. (CH, O)*

6.7.3 Time of harvesting

Generally speaking, very few comments were made regarded this aspect. Consumers in all case study countries mentioned the period of ripening and harvest time; sometimes cultivation and harvesting techniques were also cited as a possible difference, although in rather vague terms.

In France and Switzerland, wine consumers stated that the harvest time for each type is different:

> *"It has to be more flexible than for wine harvesting". (FR, W).*

6.7.4 Harvesting practices and yield

This issue was mentioned only in the Italian and Swiss focus groups. A few consumers assumed different yields (IT, CH), namely lower wine grape yields (only in CH). The French consumers also know that its conditions are not the same because table grapes have to be harvested by hand. Swiss consumers assumed that there were differences in harvesting techniques, without specifying what these might be.

> *"I don't know exactly whether table grapes are harvested sooner than grapes for wine production, or if they are harvested several times." (CH, O)*

Others Swiss consumers assumed that table grapes are harvested later:

> *"Table grapes are harvested later so that they become sweeter". (CH, W)*

6.7.5 Pesticide treatment

In Italy, France and Switzerland, consumers assumed that table grapes are treated more with pesticides for cosmetic purposes. However, participants in the Italian and Swiss focus groups assumed a longer latency period after pesticide treatment.

> *"To me table grapes are full of pesticides that are not visible, while wine grapes are not." (IT, W)*

In contrast to this, one organic consumer in the German focus groups assumed that grapes for consumption were definitely treated less with pesticides and herbicides.

6.7.6 Taste

Only very few comments were made about this aspect in the case study countries. In Italy, one consumer stated:

> *"Table grapes are fresher, you can eat the whole fruit, it's healthier, it's different." (IT, O)*

In France, consumers stated that table grapes are sweeter due to a higher sugar content. German consumers also thought that grapes for consumption in particular must be sweet. They assumed that wine could also be produced from sour-tasting grapes.

In Switzerland, consumers discussed whether table or wine grapes have a better aroma, and opposing opinions were expressed on the matter.

6.7.7 Appearance and other issues

Issues related to the appearance of the grapes were not discussed in Italy or Switzerland. French and German consumers described wine grapes as smaller and more compact, and the appearance of table grapes as better.

In Switzerland, consumers in both target groups expressed their concern that wine grapes which were treated with pesticides are pressed without being washed beforehand.

6.8 Perceptions of organic grapes compared with conventional grapes

The major perceived difference between organic and conventional grapes lies in the use of pesticides (IT, FR, CH). In Italy, hardly any other major differences were mentioned (harvesting date and techniques, appearance of grapes and shelf-life). In Germany, some consumers expressed their dissatisfaction towards table grapes without specifying this issue.

6.8.1 Production intensity (high intensity, low intensity)

One Italian organic consumer cited this issue when comparing the two cultivation methods stating that yields are limited in organic cultivation. In Switzerland, another aspect was mentioned: Conventional grapes are related to mass production and "over"-cultivated.

6.8.2 Production methods (herbal and disease control)

This aspect was the most quoted to assess differences amongst conventional and organic grapes in all the case study countries. The majority in both target groups stated that in organic cultivation no chemicals are allowed.

> *"The soil is not treated; if there are weeds, they are mechanically destroyed and used as green manure." (IT, O)*

> *"In organic cultivation they use biological pest control; but this is not able to control fungi and mildew." (IT, W)*

French consumers discussed pesticides residues and assumed that organic grapes do not contain any pesticide residues. French and German consumers therefore consider them to be healthier. In addition, German consumers assume that fewer fertilizers are used in organic grape production. However, one consumer argued in the debate about pesticide use and residues that conventional grapes are not toxic either. The topic of pesticides seems especially relevant to grapes, because grapes are not peeled before consumption. This is why organic grapes are especially appreciated.

Some German consumers were very sceptical towards organic grapes and stated that non-organic grapes were also contaminated.

> *"One should avoid eating grapes that come from certain places". (DE, O)*

According to Swiss consumers, organic grape production is related to small scale and natural grape production. Consumers believe that conventional table grapes, in contrast to organic table grapes, are treated with pesticides. One consumer mentioned a natural method of weed control by sheep. Another consumer believes that organic grapevines are planted with more space in between them. In addition to this, different varieties are used. The grapevines have a longer crop life with continuous yields. Some other consumers were not convinced by organic grape production and argued that organic production could not be taken seriously because it only plays a minor role compared with conventional production.

6.8.3 Date of harvesting

Swiss and French consumers assumed that the harvesting date of organic table grapes was later than that of conventional table grapes. They assumed that table grapes are sun ripened.

In Switzerland, a debate about seasonality generated the argument that if organic table grapes are offered during the winter season, they can no longer be described as organic. The same applies to organic grapes from overseas. One Swiss consumer pointed out that "Knospe", the Swiss Organic label, does not mean short food miles.

6.8.4 Harvesting technique (hand picking, mechanical picking)

Only Swiss consumers mentioned this issue when describing differences between organic and conventional grape production. They discussed whether machine harvesting of organic table grapes is permitted or prohibited. Most consumers assumed that organic table grapes are hand picked.

6.8.5 Appearance of grapes (size, appearance)

This issue was mentioned by French and especially German and Swiss consumers to describe differences between organic and conventional grapes, while it was not mentioned in the Italian focus groups.

One French consumer described organic grapes as follows:

> *"The skin of organic table grapes is less rough and doesn't make your mouth hurt, even if you wash the grapes". (FR, O)*

In Germany, the first characteristic mentioned by several consumers was:

> *"Organically produced grapes are smaller" (DE, W)*

They also perceived differences in colour, describing them as more yellow, or else they identified differences in the shape:

> *"When buying organic grapes, the expectation is that every grape has grown individually and looks different. That doesn't matter. They shouldn't look unappetising, but if they are healthy and not artificial, you can live with it." (DE, O)*

One German consumer was concerned about the white outer surface of the table grapes. Organic grapes should not have such a white surface.

Concerning taste, organic grapes are sometimes assumed to be fruitier, but sometimes more sour as well (CH). Swiss organic consumers in particular generally appreciate organic grapes as fruitier, more intensive, sweeter and more authentic in taste. They said that non-organic fruits bought in the supermarket taste like water. In general, they thought that it is not normal for grapes to look as good as they do after a long period of transport and storage. They thought that they usually looked artificial. Conventional grapes are characterized by Swiss consumers as more perfect in appearance than organic table grapes. They are shiny and are bigger. One unclear point was whether there are organic grapes without any seeds. One participant would expect to find seeds in organic grapes, but his daughter asks for grapes without seeds. He assumed that they probably cannot be organic.

Consumer 1: "There is a question about the seeds. Grapes without seeds have been on sale in Switzerland for some years now."

Consumer 2: "To me, that's not organic anymore."

Consumer 1: "I think it's marvellous".

Consumer 3: "It's unnatural".

Consumer 1: "But it is not chemically produced, the grapes are bred without seeds": (CH, W)

If organic grapes are too big, one consumer doubted whether they are indeed organically produced.

Another aspect only mentioned in the French focus groups was the packing of the table grapes. Organic table grapes are supposed to use less packaging materials than conventional grapes.

6.8.6 Shelf-life

One Swiss consumer stated that organic grapes have a longer shelf-life than conventional grapes.

7 Discussion

This chapter begins with some general remarks about the dual role of wine consumption, followed by a discussion of the purchase and quality criteria of wine. The bulk of the discussion is devoted to a consideration of perceptions and images of organic wine, requirements for organic wine processing and recommendations for a labelling system for organic wine.

7.1 Dual role of organic wine

Despite being a beverage consumed on a regular basis, wine is not classified as food. To a certain extent, it is a stimulant, or a luxury product. Thus, consumers' perceptions of wine are not directly comparable to consumers' perceptions of organic food.

When considering the similarities between wine and food products, one aspect is that of "processing", which applies to wine as well as to a considerable number of food products. Another similarity is the cultivation of grapes, which is comparable to the cultivation of food. However, the main difference relates to the function of consumption. Here, wine is considered to be both a food product and a stimulant or luxury article.

This dual role of wine was also reflected in this consumer study. Many consumers appreciated the healthy character of mainly red wine, and especially of organic wine, which is generally considered to be healthier than conventional wine. Also, organic food is considered to be healthier than conventional wine (Zanoli et al. 2004). However, when consumers perceive wine as a luxury article, they primarily want to savour wine. From this point of view, sensory quality – and not the health aspect – is predominant.

7.2 Purchase and quality criteria of wine

When considering the relevant purchase criteria of wine mentioned by the participants in the consumer study, such as geographical origin (main purchase criterion in IT, CH), the wine tasting event (main purchase criterion in FR) or the taste (main purchase criterion in DE), almost all the criteria are related to the expectation that the wine should have a specific taste. It clearly emerges that consumers appreciate variation in their wines. They find variation in choosing different countries of origin and "terroirs", and in matching the right wine to an event or meal. This becomes even more apparent considering the large range of different wines on offer in supermarkets or specialized wineries.

The production system, in contrast, plays a minor role as buying criterion. According to consumers, sensorial quality of wines mainly depends on the processing methods and not on the production.

7.3 Image of organic wine

Regarding the image of organic wine, three dimensions were considered: production, processing and quality. Starting with the image of organic wine grape production, consumers have a very positive image of organic cultivation methods, which are considered to be environmentally friendly because they do not involve the use of pesticides. In addition, consumers believe that organic wine grape production means small scale and more traditional production, such as, for example, harvesting the grapes by hand. This is a more nostalgic image of organic wine cultivation. Organic is also associated with small scale and original production in other consumer studies investigating people's perceptions of organic food (François and Sylvander, 2006). Thus, organic farming seems to be a significant alternative to large scale or rather industrial wine production.

The predominant difference perceived between organic and conventional wine cultivation is the prohibition of chemical pesticides, which is also identified as a relevant purchase criterion for European consumers in relation to vegetables and fruit (Zanoli et al., 2004). Another important aspect was the association with the wine growing area. The geographical location of cultivation (and processing), along with personal knowledge of the farm and the producers, seemed very important to the consumers consulted (from both the organic consumers and quality wine consumers groups). Consumers in Switzerland and Italy in particular associated organic wine with the status of a local or at least a national product. For Swiss consumers, the short "food miles" of such a national product fits in with the concept of organic wine. This was also found in the consumer study conducted by Zanoli et al. (2006), that organic products are generally associated with national production.

Consumers in both target groups have not only a positive perception of organic wine grapes production but also a positive image of organic wine processing. It is perceived as natural and gentle. This image of organic products is in line with results from other consumer studies, in which the processing of organic products is associated with natural modes of processing (Francois and Sylvander, 2006). Consumers do not expect to encounter any additives (or only few, at least) or harmful substances. Nevertheless, a lack of knowledge among consumers regarding conventional wine processing prevents them from being able to argue with facts. Almost no participant demonstrated advanced knowledge of wine processing. Instead, they had to make judgments about production systems on the basis of vague ideas, images and feelings.

The rather positive image of wine cultivation and processing found in this consumer study gives rise to positive perceptions of the health aspects of organic wine. Quality attributes, such as pureness, salubriousness and healthiness are all associated with the organic wine concept. Consumers consider wine to be a pure product without pesticide residues or harmful substances or additives.

However, wine in general is already considered to be a natural product by almost all consumers. As long as conventional wines are not perceived as posing a risk through harmful substances that have negative impacts on health – unlike meat, for example, which has been highlighted in media reports about antibiotics residues – quality wine consumers will not generally be especially motivated to buy organic wine.

This consideration is reinforced by the image of taste associated with organic wine identified in this consumer study. In contrast to the positive image enjoyed by the production and processing methods of organic wine, the sensory quality of organic wine generally fails to convince consumers. Organic wine is not considered to imply a better sensory quality than conventional wine. On the contrary, some consumers consider organic wine to be of inferior quality compared with conventional wines.

This rather negative image of the way organic wine tastes is certainly the most relevant purchase barrier for organic wine, alongside the fact that consumers are not well informed about the differences between conventional and organic wine and viticulture. It is also difficult to convince quality wine consumers to buy organic wine if they are not aware of the benefits of organic wine and these are not communicated to them. Only a few consumers know what current legislation stipulates for organic wine, and which additives and processing aids are normally used. Moreover, consumers are unhappy to pay premium prices if they think organic wines are inferior in terms of sensory quality.

One important element in consumers' perceptions seems to be wines that have a specific identity. Consumers appreciate knowing the producer and the place where the wine was produced ("terroir"), and this gives them a sense of the special identity of the wine. Experiencing such wines is different from consuming an anonymous, mass produced wine because the consumer has a mental image of the "terroir" of the wine.

Another important finding is that consumers still do not see organic wine as a premium wine. Quality wine drinkers in particular stated that they do not know any famous organic wines, even though such wines do exist. A major problem in this context is that organic premium wine is almost never offered in specialized wine shops, where consumers go if they want to purchase a special wine of premium quality.

7.4 Consumer requirements of the processing techniques for organic wine

The intention to include consumers in the process of developing recommendations for organic wine regulation, which is one aim of the EU project ORWINE, poses a special challenge because consumers have little knowledge about wine processing techniques. Both researchers and consumers alike were aware of this problem. The aim of the consumer study was to establish their spontaneous acceptance of certain processing techniques in accordance with their own personal notions about organic wine. There follows a discussion of the three strategies developed by consumers to judge wine processing techniques:

1) substances that are harmful to health, regardless of whether they are necessary for making a good wine, should be banned;

2) additives or processing aids which affect wine flavour and taste or its naturalness or tradition/authenticity should be banned;

3) lower maximum levels of critical substances should be permitted, especially for sulphites, and the declaration of the use of unhealthy substances in organic wine processing should be introduced.

The first strategy, to ban harmful substances from organic wine processing, would result in a ban on sulphites, as these can cause allergies and headaches. Other critical substances might be selected yeasts, bacteria and enzymes if these substances are genetically modified, since the health risks of GMOs have not been adequately investigated. As GMOs are generally forbidden in organic farming, yeasts, enzymes and bacteria could be used in organic farming as long as they are not genetically modified. A third critical substance when applying this benchmark is gelatine, as it has not been proved conclusively that this processing aid does not entail the risk of BSE-infection.

The second strategy would affect all the processing aids and additives discussed in terms of flavour/taste. Besides, consumers saw the use of wood chips as a loss of authenticity compared with the traditional way of producing "barrique" wines, which are

stored for a certain time in wooden barrels. In addition, wine processed by using selected yeasts, bacteria and/or enzymes might be seen as unauthentic, because the micro-organisms belong to specific terroirs. Authenticity and "traditional" production is an important characteristic of organic farming. Given this fact, two possibilities could be considered with regard to wood chips: a first strategy could be to ban wood chips from organic wine processing. A second strategy would be to introduce the declaration of wood chips. With regard to the use of selected yeasts, bacteria and enzymes, no direct need for regulation is considered necessary, as only a few consumers are aware of this issue and because no risks are perceived in relation to it.

The third strategy seams to be the easiest and yet the least appropriate at the same time. It would be very difficult to communicate the differences between organic and conventional wine processing to consumers. Introducing lower maximum levels is one way of defining differences between organic and conventional wine processing; however, it should not be the only strategy used. The differences would be too unclear to consumers.

Thus, none of the three strategies above seems to be appropriate when deciding on the individual additives and processing aids used in organic wine processing. However, a combination of the three strategies would cover most consumers' interests. The aim here should be to establish clear differences between organic and conventional wine processing regulations, especially with regard to critical and harmful substances. This would at least imply a lower maximum level for sulphites, as long as no alternatives are available. Wood chips should be either banned or declared. Enzymes, yeasts and bacteria should not be genetically modified but derived naturally.

Gelatine does not fit well into the concept of organic wine, as consumers do not expect animal products to be used as wine processing aids. Gelatine would have a better acceptance by consumers if gelatine from animals would be replaced by vegetable substances. Thus, gelatine from animals should at least be declared on the wine label as long as plant gelatine is not allowed in organic wine processing.

Nevertheless, consumers recognize that wine processing is a work done by experts, and they trust the organic wine makers to create standards that are in accordance with their best practices. Standards must leave room for adjustment, however, to facilitate the production of good wines from organic grapes in difficult or unusual conditions as well.

7.5 Consumer requirements of the labelling system for organic wine

Four different labelling strategies are proposed for discussion:

5) Complete list of ingredients, additives and processing aids, as well as relevant methods, to appear on the label;
6) Reduced list with the labelling of a selection of additives and processing techniques;
7) Declaration of those substances not used in production or processing;
8) No declaration, but the organic label to stand for unambiguous cellar regulations.

The first suggestion would be the most transparent solution; however, it would entail unfair competition between conventional and organic wine production if conventional

wines were not also obliged to fulfil the same detailed labelling requirements. Furthermore, a complete list would overburden consumers and wine labels alike.

The second strategy might provide a way to inform consumers in a more transparent way, but the problem of unfair competition still remains if organic wine alone is subject to a labelling obligation.

The third strategy of labelling those substances not used in wine production is probably a good way of informing consumers and communicating the benefits of organic farming at the same time (e.g. non-use of sulphites). This labelling concept is therefore beneficial in terms of improving the marketing potential of organic wine. However, it might be viewed critically by those organic producers who still use these substances.

The fourth and last solution does not imply an unfair competitive situation for organic wine, but consumers do have to take action themselves if they want to find out about the differences between organic and conventional wine by looking up the regulations that are behind the organic label. This is sure to entail too much effort for some consumers if the benefits of organic wine are not clearly communicated.

8 Conclusion and recommendations

8.1 General conclusions

For consumers, the most relevant purchase criteria for wine in general are geographical origin, the purpose of consumption and the taste of the wine. It was found that consumers appreciate the diversity of wine in terms of geographical origin, grape varieties and types of wine. Such diversity should be maintained as far as possible.

Wine quality is associated with the geographical origin of the wine and the special "terroir". The "terroir" may be considered as added value alongside the sensory value of consuming wine: consumers have a mental image of a particular "terroir" when drinking wine. The uniqueness of such "terroir" wines is also appreciated.

The present consumer survey has clearly shown that consumers have a positive perception of organic wine with regard to its healthiness as well as the mode of production and processing. Consumers perceive wine as a product that has been produced without chemical pesticides. It also has the image of being purer than conventional wine and of being processed without harmful substances and with no (or very few) additives or processing aids. One highly relevant issue is that consumers expect organic wine to contain no harmful residues.

Despite the rather positive image of organic wine in terms of production, processing and healthiness, perceptions of the way organic wine tastes are rather negative in all four case study countries (IT, FR, DE, CH). This applies both to those consumers who have already experienced organic wine and to those consumers with no previous experience of organic wine. Consideration can be given to two reasons for the poor image associated with the taste of organic wine, based on the responses of the participating consumers:

- In the early days of organic wine production, a lack of know-how among organic wine producers lead to a negative impact on perceptions of taste that has persisted to the present day.
- Organic wine is not available in specialized wine shops, where consumers expect to find high quality wine.

Consumers want organic wine to be an authentic, pure, healthy product that is processed on a small scale. Given that "food miles" do not fit into the concept of organic products, organic wine is considered to be a nationally or locally produced product, so that trust in nationally and locally produced organic wine seems to be stronger.

The study has shown that consumers lack knowledge about the processing methods of both organic and conventional wine. Thus, some consumers want to obtain information about organic wine production and producing at the point of sale.

The following recommendations for specific actors have been derived on the basis of the consumer study findings.

8.2 Recommendations for different actors

A) EU policy makers and administrators

The consumer survey has identified the most relevant areas to be considered when regulating wine in the European Union. These are the use of additives and processing aids on the one hand and labelling on the other.

If organic wine is included in EU regulations for organic food and farming or in other European community rules, the consumer will expect the rules governing organic wine to fit with the image of organic wine as a “natural” product, which is adulterated as little as possible. The list of additives and processing aids needs, therefore, to be short. The additives are not a problem in general, as long as no risks are associated with them, e.g. the use of egg-based additives or gelatine could be further restricted to plant-based sources and not animal-derived substances.

The consumer must be reassured that the regulations call for the use of yeast and bacteria to be free of risk of GMO-contamination.

Considering the use of sulphites, the results can be interpreted in two ways. A maximum level could be set that ensures there are no health risks but still guarantees a good wine. There was no clear indication from the consumer study that sulphites should be completely banned for organic wine production, although for some consumers sulphites were seen as critical. However, a lower maximum sulphate level might be something that committed consumers understand; the exact level set is not so important.

Regarding labelling, consumers want to know where wine comes from. The proposed draft for a new EU regulation on organic food and farming will be more demanding regarding labelling that states a product’s origin, especially if the product comes from the EU or non-EU countries. Although the requirement of labelling the product’s origin is in the interests of the wine producer, it is clear that transparency regarding the origin is even more important for organic wine than it is for non-organic wine. Regarding the use of wood chips, two possibilities could be considered: banning them or labelling their use.

Other issues, such as restrictions regarding specific processing methods, could not be clearly extracted from this consumer research. Thus, this seems not to be a priority area for the EU commission for the time being in its efforts to regulate organic wine.

B) Private standards setters

Based on the consumer survey, the following recommendations are directed at the private sector:

Producers and producer organisations

- Participation in wine awards in order to demonstrate the premium quality their products;
- Reinforce presence of organic wines in specialized wine shops;;
- Increase sensorial quality, if necessary.
- Organize wine tasting in order to increase direct sales.

Retailers

- Provide information at the point of sale (leaflet, homepage, label) with information about the producer as well as about production and processing methods applied and the “terroir” of origin.
- Organize wine tasting events in order to give consumers the opportunity to try wines before purchasing them.
- Avoid putting the organic label at the front o the wine bottle as long organic wine has a negative quality image.

C) Research institutes and advisory services

The present consumer survey has revealed two areas where further research could make a useful contribution:

Research contributing to a reduction in the use of additives and processing aids corresponds to the expectations of many consumers. This includes lowering the level of the use of additives and sulphur, as shown in the ORWINE project.

Although the health aspect was of secondary importance, many consumers in the survey associated organic production with health attributes. Further research on health promoting substances such as secondary metabolites, e.g. resveratrol, would be of interest to these consumers.

Advisory services should support wine producers and processors in improving the taste of their wines, by providing better knowledge about the interaction between the different factors that contribute towards the production of high quality wines.

To conclude, the survey has pointed out some interesting fields of action for policy makers, producers and their organizations, retailers and researchers.

References

Association Swiss Wine (2004): Das Image der Schweizer Weins verbessert sich. Journal Obst- und Weinbau, 2004.

Carite, J. M. (2002): Géopolitique le vin bio ? Et comment! VIN BIO Magazine, 1, janvier 2002.

Chevalier, M.-A. (2003): Marché des vins issus de l'agriculture biologique en Allemagne. ONIVINS études - CFCE, décembre, 2003.

European Commission (2006): What is the current situation of the European Union's wine sector? URL: http://ec.europa.eu/agriculture/markets/wine/index_en.htm.

FAW. Mehr Schweizer Wein verkauft. Research Center for fruit, wine and horticulture, 2006. URL: http://www.db-acw.admin.ch/pubs/wa_oen_05_pub_958_d.pdf

Francois, M. and Sylander, B. (2006): Consumers perceptions and behaviour regarding organic and low input foods – European focus group discussion results. EU-QLIF (Quality Low Input Food). URL: http://www.qlif.org/research/sub1/pub/1_1_2_GRET.pdf

Hair J., Bush R. and Ortinau D. (2006): Marketing Research with a changing environment. Revized international edition. McGraw-Hill/Irwin, New York.

Konrad, B.; Flüeler, T.; Hühn, T. (2004) Die Weintypisierung als Navigationshilfe. URL: http://www.db-acw.admin.ch/pubs/wa_oen_05_pub_928_d.pdf

Merum (2006): Wie rein soll Wein sein? Reader survey. Journal of Italian Wine and Olive Oil “Merum”. URL: http://www.merum.info/Images/MerumUmfrage3_06.pdf.

Renaudon, M.-H. Vin (2002): Bio: dynamisme malgré la surproduction. Du Sol à la Table, n°60, décembre, 2002.

Roland, B. (2002) Von der Traube zum Wein. Obst- und Weinbau, Schweizerische Zeitschrift für Obst- und Weinbau, 2002.

Rufener, H. P (2004): Wädenswiler Weintage. Journal Obst- und Weinbau 2004.

Santini. Opportunità di marketing per i vini da uve bio. Santini, C. Opportunità di marketing per i vini da uve bio. VQ numero 2, March 2006. Edizioni Phytoline, Affi (VR).

Willer H. and Yussefi M. (2006): The world of Organic Agriculture. Statistics and emerging trends 2006. International Federation of Organic Agriculture Movements (IFOAM) & Research Institute of Organic Agriculture (FiBL).

Zanoli, R. Bähr, M., Botschen, M., Laberenz, H., Naspetti, S. and Thelen, E. (2004): The European Consumer and Organic Food. Organic Marketing Initiatives and Rural Development, Volume Four. School of Management and Business, Aberystwyth, U.K. p.38.

Appendix 1

Recruitment grid for Target group 1: Regular Organic Consumers

Hello, my name is … We are looking for consumers to take part in a group discussion for a European research project on wine. The group discussion involves asking 8-11 participants about their opinions and perceptions of wine. In return for participating, you will receive … €. Are you interested in joining a group discussion? As we have some quotas for the composition of the group, I would like to ask you a few questions:

Section A: General Criteria

Have you taken part into a focus group discussion within the last 6 months?

- ☐ Yes (Thank respondent and close interview)
- ☐ No

Is your job related to wine production or the wine trade?

- ☐ Yes (Thank respondent and close interview)
- ☐ No

How often do you drink wine?

- ☐ At least twice a per month
- ☐ Less than twice a month (Thank respondent and close interview)

Are you mainly responsible for buying wine in your household?

- ☐ Yes
- ☐ No (Thank respondent and close interview)

To which of the following age groups you belong: *)

- ☐ 20-33 years
- ☐ 34-47 years
- ☐ 48-60 years

Record gender: *)

☐ Female

☐ Male

*) Each focus group has to consist of at least 3 male and 3 female participants and at least 3 participants from each age groups

Section B: Consumers of Organic Food

How often do you consume the following products?

Product	Approximately once a week	Less than once a week
Organic vegetables		
Organic fruit		
Organic meat and/or eggs		
Organic dairy and/or products		
Organic bread and/or cereals		
Organic beverages		
Other organically produced food		

(If less than two categories are consumed once a week thank respondent and close interview)

Please decide whether the following statements about organic food are correct. Food is organically produced if the…

	Yes	No
a) it is produced exclusively in a national park or a nature reserve (no)		
b) it is produced and processed without GMO inputs (yes)		
c) it is produced according to specific EU-wide rules (yes)		
d) it is produced without synthetic pesticides and nutrients (yes)		

Correct answers: a) no, b) yes, c) yes d) yes – If less than 3 questions are correctly answered thank respondent and close interview)

Have you ever consumed organic wine?

☐ Yes ☐ No

Please recruit at least four organic buyers, who have previously bought and consumed organic wine.

Appendix 2

Recruitment grid for target group 2: Quality wine consumers

Hello, my name is …We are looking for consumers to take part in a group discussion for a European research project on wine. The group discussion involves asking 8-11 participants about their opinions and perceptions of wine. In return for participating, you will receive … €. Are you interested in joining a group discussion? As we have some quotas for the composition of the group, I would like to ask you a few questions

Section A: General Criteria

Have you taken part into a focus group interview within the last 6 months?

- ☐ Yes (Thank respondent and close interview)
- ☐ No

Is your job related to wine production or the wine trade?

- ☐ Yes (Thank respondent and close interview)
- ☐ No

How often do you drink wine?

- ☐ At least twice a month
- ☐ Less than twice a month (Thank respondent and close interview)

Are you mainly responsible for buying wine in your household?

- ☐ Yes
- ☐ No (Thank respondent and close interview)

To which of the following age groups you belong: *)

- ☐ 20-33 years
- ☐ 34-47 years
- ☐ 48-60 years

Record gender: *)

- ☐ Female
- ☐ Male

*) Each focus group has to consist of at least 3 male and 3 female participants and at least 3 participants from each age group

Section B: Consumers of Quality Wine

The next question is related to the place where you buy wine and about the importance or meaning of drinking wine.

	Yes	No
Do you sometimes buy more expensive wine that has an over-average quality?		
Do you also frequently buy wine in specialized wine shops or directly from wineries?		
Are you interested in the mode of production and processing of wine?		

(If less than two of the three questions answered by yes, thank respondent and close

Appendix 3

Focus Group Questionnaire on wine consumption habits of the participants

1. Age (in years)

- ☐ < 29
- ☐ 30 – 39
- ☐ 40 – 49
- ☐ 50 – 59
- ☐ > 60

2. Gender

- ☐ Female
- ☐ Male

3.Level of professional education

- ☐ University degree
- ☐ Education as technician, assistant …
- ☐ Others
- ☐ No professional education

4. What is your current work ?

- ☐ Student
- ☐ Housewife / - man
- ☐ Manual worker
- ☐ Employee
- ☐ Entrepreneur, self- employed
- ☐ Official, civil servant
- ☐ Others

5. How often do you consume wine ?

- ☐ Every day
- ☐ At least once a week
- ☐ Several times a month
- ☐ Once a month
- ☐ Less than once a month

6. Where does the wine that you consume most (> 50 % of yearly consumption) . come from ? (only one answer possible)

- ☐ Own region *(please fill in your region)*
- ☐ Own country *(please fill in your country)*
- ☐ Other European Countries (except of own country)
- ☐ **Overseas (** (e.g. Australia, USA, South Africa…)
- ☐ No preferences

7. What kind of wine do you consume most (> 50 % of yearly consumption) ?

- ☐ Red
- ☐ White
- ☐ Rosé
- ☐ No preferences

8. Where do you buy most of your wine ? (max. two answers possible)

- ☐ Supermarket
- ☐ Discount market
- ☐ Specialized off-license
- ☐ Organic shop
- ☐ Wine producer
- ☐ Internet shop / delivery service
- ☐ Others (petrol station …)

9. In which of the following price categories do you buy most of your wine?

(€ per 750 ml bottle)

Every day consumption

- ☐ < 2
- ☐ 2 – 3.49
- ☐ 3.50 – 4.99
- ☐ 5 – 7.49
- ☐ 7.50 – 9.99
- ☐ 10 - 20
- ☐ > 20

Special events

- ☐ **< 2**
- ☐ **2 – 3.49**
- ☐ **3.50 – 4.99**
- ☐ **5 – 7.49**
- ☐ **7.50 – 9.99**
- ☐ **10 - 20**
- ☐ **> 20**

10. What type of closure do you prefer?

- ☐ Natural cork
- ☐ Synthetic stopper
- ☐ Screw cap
- ☐ Glass closure
- ☐ No preferences

Appendix 4

Focus group guidelines

Duration	Text for facilitator	Material	Section
5 min	Introduction: Welcome and thank you very much for coming to the group discussion. I will briefly introduce myself: My name is …. I work at … doing … I will facilitate this group discussion and this is ….who works in… Mr/Mrs …will assist the group discussion. A group discussion is a group interview in which each participant is asked to express their opinions on certain topics. This group discussion is taking place as part of a European research project called Organic viticulture and wine-making about production and consumption of wine. You as consumers are invited to express your attitudes and opinions while I just help the group discussion process along. The group discussion will be recorded so that it is possible to analyse what was said. So please keep in mind that only one person should speak at a time, because if more than one person is speaking we won't be able to understand what was recorded. I can confirm that the information will only be used for the European research project and not for other purposes or studies. The group discussion will take approximately …. You will receive incentives of …..after the discussion. So now we can start: First of all, I would ask you to complete the questionnaire about your wine consumption habits.	Records (and camera), notes taken by assistant (noting down who said what) Name tabs	Introduction by the facilitator aimed at giving information about the research project and the FGD procedure. Facilitator

5 min	Completion of questionnaire about wine consumption habits :	Questionnaire, pens	Written section Please collect the questionnaires after the end of the FGD! (Check that participants do not take them home)
5 min	Now we start with the first question. Please introduce yourself briefly and answer to the following question one after another: On what criteria do you choose wine for everyday consumption? Would you like to start, please?	PowerPoint presentation with the questions from the guidelines so that it is easier for consumers to keep the question in mind.	Brainstorming opinions in turn; each participant is asked to give a short response to this question.
15 min	Let's now start to discuss the following question: 2. What does good quality wine mean in your opinion? In this section everyone is free to make statements and to comment on the arguments of the other participants. Please keep in mind that only one person should speak at the same time, otherwise we will not be able to analyse what was said.		Group discussion with interaction; all participants should respond to this question.
10 min	The next question is a brainstorming in the round, as in question 1. 3a. What springs to mind for you when you think about organic wine? Please consider aspects of wine yarding, wine making and wine quality. Would you like to start, please?		Brainstorming in turn about opinions; each participant is asked to give a short response to this question.
15 min	We will now discuss the different parameters of organic wine. 3b. Which of the parameters presented here would you associate with organic wine in a positive or in a negative	List of parameters presented on a blackboard / in the PowerPoint presentation	Group discussion with interaction; all participants should respond to this question. Facilitator should ensure that

	sense?		consumers comment on every point on the list.
5 min	4a. Do you know any additives or processing aids used in wine processing?		Group discussion with interaction; all participants should give a response to this question.
25 min	At the moment, there is a discussion process about which additives and production aids should be used in organic wine processing and which should not be allowed. Our intention is to include your opinions as consumers in this discussion. Therefore, I would like to go into a bit more detail about wine making. The flow-chart shows the most relevant wine processing steps and a selection of additives and processing aids used in conventional wine processing. After harvesting, the berries are separated from the peduncles. The next step is to get mash by crushing the berries. In red wine technology, the mash is filled into a tank. In white wines must is directly obtained by pressing (no skin contact). Sulphites are then added to reduce oxidation and to suppress bacteria and wild micro-organisms. Enzymes are added to improve the extraction of red wine colour and to improve the pressing. In the next step, the mash is pressed. The pomace is taken out. Now the alcoholic fermentation starts. To improve fermentation and to avoid negative flavours in wine, selected dry yeast cells are added, which are separated out after fermentation by filtration. In wine from overseas, wood chips are added as a cost-reducing method to imitate the typical flavour of oak barrel-aging wine. To clarify the wine, food gelatine is added. This is a processing aid aimed at reducing tannins, reducing astringency and improving the stability of wine.	Show the flow chart and explain the individual steps of wine processing; provide information about the additives and processing aids used in wine processing.	Facilitator

	The gelatine is filtered out in the filtration process. After the alcoholic fermentation, selected bacteria are added and the second fermentation process, the malolactic fermentation, begins. The bacteria harmonise the acidity and flavour and stabilize the wine. The next step is the filtration and bottling of the wine. What we would like to know from you as consumers is: 4b. Which of these additives (with the exception of wood chips) and processing aids that are generally permitted in wine processing should be permitted to be used or should not be used in organic wine processing in your opinion. Please give reasons for your arguments!		Group discussion with interaction; all participants should give a response to the chosen parameters pinned on a black board.
10 min	5. When you go out to buy organic wine, which information about the organic wine regarding origin, production and processing would you wish to get from the label and why?		Brainstorming in turn about opinions; each participant is asked to give a brief response to this question.
5 min	6a. Do you think there are differences in the production system of grapes for wine making and for table consumption?		Group discussion with interaction; all participants should respond to this question.
5 min	6b. What differences do you assume exist between table grapes from organic farming compared with conventional table grapes?		Group discussion with interaction; all participants should respond to this question.
Duration	Text for moderator	Material	Section
5 min	Introduction: Welcome and thank you very much for coming to the group discussion. I will shortly introduce myself: My name is …. I am working at … doing … I will moderate this group discussion and this is ….working in… Mr/Mrs …will assist the	Records (and camera), notes taken by assistant (noting down who said what) Name tabs	Introduction by the moderator aimed at giving information about the research project and the FGI procedure. Moderator

	group discussion. A group discussion is a group interview in which each participant is asked to express their opinions on certain topics. This group interview takes place within a European research project called Organic viticulture and wine-making about production and consumption of wine. You as consumers are invited to express your attitudes and opinions while I just accompany the group interview. The group interview will be recorded for making it possible to analyse what was said. So please keep in mind that only one person should speak, because if more than one person is speaking we won't be able to understand what was recorded. I can affirm that the records are only used within the European research project and not for other purposes or investigations. The group interview will take approximately …. You will receive incentives of …..after the discussion. Now we can start: First of all, I kindly ask you to complete the questionnaire about your wine consumption habits.		
5 min	Completion of questionnaire about wine consumption habits :	Questionnaire, pens	Written section Please collect the questionnaires after the end of the FGI! (Check that participants do not take them at home)
5 min	Now we start with the first question. Please introduce yourself briefly and answer to the following question one after another: According to which criteria do you choose the wine for usual consumption?	PowerPoint presentation with the single questions from the guidelines for that it is easier for consumers to keep the question in mind.	Circulating brainstorming about opinions; each participant is recommended to give a short statement to this question.

	Would you like to start, please?		
15 min	Now we start a first discussion bout the following question: 2. What means a good quality of wine on your opinion? In this section everyone is free to make statements and to comment the argument of the participants. Please keep in mind that only one person should speak at the same time, otherwise we will not be able to analyse what was said.		Group discussion with interaction; all participant should make statements to this question.
10 min	The next question is a circulation brainstorming as in question 1. 3a. What comes spontaneously into your mind when you think about organic wine? Please consider aspects of wine yarding, wine making and wine quality. Would you like to start, please?		Circulating brainstorming about opinions; each participant is recommended to give a short statement to this question.
15 min	We will discuss now about different parameters of organic wine. 3b. Which of the presented parameters would you connect with organic wine in a positive or in a negative sense?	List of parameters presented on a blackboard / in the PowerPoint presentation	Group discussion with interaction; all participant should make statements to this question. Moderator should ensure that consumers comment every point on the list.
5 min	4a. Do you know additives and processing aids used in wine processing?		Group discussion with interaction; all participant should make statements to this question.
25 min	At the time, there is a discussion process about which additives and production aids should be used in organic wine processing and which should not be allowed. Our intention is to include the opinions of you as consumers into this discussion. Therefore, I would like to go a bit more into detail	Show the flow chart and explain the single steps of wine processing and give information about additives and processing aids used in wine processing.	Moderator

	of wine making. The flow-chart shows the most relevant wine processing steps and a choice of additives and processing aids used in conventional wine processing.: After harvesting the berries are separated from the peduncles. The next step is to get mash via crushing the berries. In red wines technology, the mash is filled into a tank. In white wines must is directly obtained by pressing (no skin contact). Sulfites are then added for reducing oxidations and for suppressing bacteria and wild micro-organisms. Enzymes are added for improving the extraction of red wine colour and for improving the pressing. In the next step, the mash is pressed. Thereby, the pomace is taken out. Now the alcoholic fermentation starts. For improving the fermentation and for avoiding negative flavours in wine, selected dry yeast cells are added, which are separated after the fermentation by filtration. In wine from overseas, wooden chips are added as cost-reducing method to imitate the typical flavour of oak barrel-aging wine. For clearing the wine, food gelatine is added. This is a processing aid for reducing tannins, for reducing astringency and for improving the stability of wine. The gelatine will be filtered out in the filtration process. After the alcoholic fermentation, selected bacteria are added and the second fermentation process, the malolactic fermentation starts. The bacteria are harmonising the acidity and flavour and stabilise the wine. The next step is the filtration and bottling of the wine. What we would like to know from you as consumers is: 4b. Which of these generally in wine processing permitted additives (with exception of wooden chips) and processing aids, on your opinion, could be used or rather should not be		Group discussion with interaction; all participant should make statements to the chosen parameters pinned on a black board.

	used in organic wine processing. Please give reasons for your arguments!		
10 min	5. Please imagine when buying organic wine, which information about the organic wine regarding origin, production and processing would you wish to get from the labelling and why?		Circulating brainstorming about opinions; each participant is recommended to give a short statement to this question.
5 min	6a. Do you think there are existing differences in the production system of grapes for wine making and table consumption?		Group discussion with interaction; all participant should make statements to this question.
5 min	6b. Which differences between table grapes from organic farming compared to conventional table grapes do you expect?		Group discussion with interaction; all participant should make statements to this question.