

Consumer attitudes and expectations of organic wine

Stolz, H.¹ and Schmid, O¹

Key words: consumer research, organic wine market, organic viticulture

Abstract

Within the European Union-funded research project ORWINE (Organic viticulture and wine-making) a qualitative consumer study was carried out in 2006 in the four case study countries Italy, France, Germany and Switzerland. The aim of the study was to identify consumers' attitudes and expectations of organic wine. In all case study countries, organic wine has a positive image regarding grape production and wine processing. Furthermore, organic wine is perceived as being healthier compared to conventional wine. However, regarding the sensorial quality, organic wine still faces image problems, although the taste image has improved. Consumers expect that organic wine is healthy, pure and naturally produced. A majority are sceptical of using sulphites and other additives and processing aids in organic wine processing. If organic wine processing is regulated on EU-level, consumers will expect that these rules governing organic wine fit with the image and expectations of organic wine being a "natural" and healthy product, which obtains as much as possible the original attributes and quality.

Introduction

Since two decades, the organic wine sector has been growing continuously. In 2005, the organic wine market grew by 10 by 15 percent (Richter and Padel, 2007). However, there is still a lack of knowledge about buying motives and barriers as well as about expectations towards organic wine processing on European level. Apart from that, there is no common legislative framework for organic wine processing in the European Union except for fruit wines.

Thus, the EU-funded project EU-ORWINE (Organic viticulture and wine-making) was launched in 2006, which is aimed at developing a scientifically based legislative framework for organic wine processing in the EU. Within the project, a qualitative consumer survey was carried out to identify consumers' attitudes, expectations and the image of organic wine, as well as to address standards requirements, labelling provisions and communication strategies.

Materials and methods

In order to identify consumers' attitudes and expectations of organic wine, focus groups (a qualitative marketing research method) were conducted. The method is especially suitable for analysing attitudes and motivations (Hair et al. 2006). The focus groups allowed identifying the most important perceptions of consumers, which are relevant to be considered for elaborating implementing rules of organic wine processing in the framework of the new Council regulation (EC) No 834/2007 on

¹ Research Institute of Organic Agriculture FiBL, Ackerstrasse, 5070 Frick, Switzerland, E-Mail hanna.stolz@fibl.org, otto.schmid@fibl.org, Internet www.fibl.org

organic production. Focus groups are guided by a facilitator and consist of 6-12 participants, which are invited for an interactive and spontaneous discussion of 1.5-2 hours.

Four focus groups in each of the four countries Italy (IT), France (FR), Germany (DE) and Switzerland (CH) were accomplished in 2006. These were in total 16 focus groups with 158 participants. The participants were consumers belonging to two different target groups: regular consumers of organic food of half of them with experience of organic wine (O), and quality wine consumers (W). The target groups were identified by means of a recruitment questionnaire considering typical socio-demographic characteristics and questions related specifically to each target group.

The focus groups followed common discussion guidelines in order to ensure the greatest possible reduction in bias between the case study countries. The focus groups were analysed with content analysis. Apart from analysing each country separated, similarities and differences between the countries were identified in a cross-country comparison.

Results and discussion

Perceptions and image of organic wine

Many participants perceive that organic wine is healthier than conventional wine, mainly due to the absence of chemical pesticides and additives in winemaking and processing (see Tab. 1).

Tab. 1: Perceptions and image of organic wine with regard to single criteria

Criteria	IT		FR		DE		CH	
	O	W	O	W	O	W	O	W
Without pesticides	+	+	nm	nm	+	+	+	+
Pure and authentic product	o	o	o	o	o	o	+	+
Availability	-	nm	-	o	-	o	-/+	-/+
Taste	nm	-/o	-	-	-	-/+	-/o	-/o
Healthiness	+	+	nm	+/o	-	+	+	+
Price-performance ratio	-	-	-	-	-	-	+	+/o
Trust	-/+	-	+	+	-/+	-/+	-/+	nm

- = positive image; o = neither positive nor negative; - = negative image; -/+ = both positive and negative opinions were expressed; nm = not mentioned

Apart from the positive health image also negative perceptions were expressed. They especially concern the taste of organic wine. In both target groups, several participants expressed a rather negative taste perception of organic wine. However, among the organic consumers also positive taste perceptions were stated in some countries. Several factors might be responsible for the rather negative taste image of organic wine. One is that at the early beginning of organic wine-making, organic producers focussed on grape production rather than on processing. This probably led to a negative reputation of organic wine taste, which is lasting to date. Blind testing of organic and conventional wine samples would help to clarify whether the rather negative image of organic wine is just a prejudice or if organic wine still faces a lack of sensorial quality. Another problem is the low or even missing presence of organic wines in specialised wine shops offering premium wines. Due to this, consumers easily get the impression that exclusive organic wines do not exist.

Labelling strategies for organic wine

Four different strategies about labelling of organic wines were suggested by the participating consumers. 1) A complete list of ingredients, additives and processing aids, to appear on the label. This would be the most transparent solution; however, it would entail unfair competition between conventional and organic wine production if conventional wines are not also obliged to fulfil the same detailed labelling requirements. Furthermore, a complete list would overburden many consumers and wine labels alike. 2) Labelling a selection of critically perceived additives and processing techniques, which provides a way to inform consumers in a more transparent way. However, the problem of unfair competition remains if organic wine alone is subject to a labelling obligation. 3) Labelling of those additives, which are not used in organic wine in contrast to conventional wine processing. This is probably an adequate way to inform consumers and to communicate 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. This would result into a list of not-allowed additives, which needs to be kept short. 4) No additional labelling apart from the organic indication and logo, which stands for unambiguous cellar regulations. The last solution does not imply an unfair competitive situation for organic wine. However, consumers do have to take action to find out about differences between organic and conventional wine.

Consumer acceptances and strategies for common organic wine standards

The use of certain additives and processing aids in organic wine processing was controversially discussed. The main issue was the use of sulphites, but also other additives and processing aids were emphasised in the focus groups (see Tab. 2).

Tab 2: Consumers acceptances of additives and processing aids in organic wine processing

Sulphites	<ul style="list-style-type: none">Concerns expressed by the majority of participants due to risk perception; considered as unhealthy, related to negative tasteaccepted by a minority of the participants for quality reasons
Enzymes	<ul style="list-style-type: none">lack of knowledge about use of enzymes; some considered enzymes as harmless;others fear allergies and thus declined them
Selected bacteria	<ul style="list-style-type: none">only few statements and opinions; no concern apart from the fact the bacteria should not be genetically modified
Selected yeasts	<ul style="list-style-type: none">accepted by consumers, almost no risk perceived
Gelatines	<ul style="list-style-type: none">majority declined gelatines and would rather prefer a substitution based on plant production
Wood chips	<ul style="list-style-type: none">controversial opinions expressed;one part accepts use by arguing that wood chips are natural and harmless;another part against use due the loss of authenticity and the fear to open the door for flavours and other additives alike

Consumers suggested three strategies for regulating the use of additives and processing aids in common organic wine standards: 1) General prohibition of all additives and processing aids having negatives impacts on human health. By implementing the first strategy suggested, sulphites would be excluded from organic wine processing as well as genetically modified bacteria and yeasts or enzymes as a certain risk perception exists among consumers. This also applies to gelatines which

was supposed transmitting BSE in the past, although this has never been proved. 2) General prohibition of additives, which influence taste of wines and therefore destroy their authenticity or naturalness. The implementation of the second strategy suggested would have impacts on especially the use of wood chips, because these influence the taste of wine. Although wood chips are a natural product, organic wine produced with wood chips would lose authenticity. 3) Lower maximum levels for critical substances such as sulphites and the declaration of the use of critical additives or processing aids. The third strategy is a compromise and easier to implement compared to the two previous strategies, however it is less precise, transparent and consequent.

Recommendations

If organic wine processing is regulated on EU-level, consumers will expect that these rules governing organic wine fit with the image of organic wine as a "natural" and healthy product, which obtains as much as possible the original attributes and quality. The list of additives and processing aids needs therefore to be short. Additives in general are accepted as long as no risks are associated with them. Consumers 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 may be interpreted in two ways. Setting a maximum level would reduce health risks but still guarantee a good wine in terms of stability and taste. Besides, a lower maximum sulphate level might be a solution accepted by consumers.

Further research contributing to a reduction of using additives and processing aids would correspond to the expectations of health-conscious consumers. This especially includes lowering the level of sulphites use, as shown in the ORWINE project. 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 interesting elements to be considered for a common organic wine processing regulation on EU-level, especially regarding the use of sulphites.

Acknowledgments

The authors acknowledge the support of the EU Commission for funding this research. Furthermore, the authors acknowledge their project partners Raffaella Roviglioni and Cristina Micheloni (AIAB, IT), Marie-Christine Monnier (ITAB, FR), Maik Werner and Dieter Hoffmann (SRIG Geisenheim, DE) for their contribution to this study.

References

- Hair, J., Bush, R., Ortinau, DU. (2006): Marketing Research within a changing environment. MacCraw-Hill/Irwin, New York, USA.
- Richter, T. and Padel, S. In: Willer H. and Yussefi M. (2007): The world of Organic Agriculture. Statistics and emerging trends 2006. International Federation of Organic Agriculture Movements (IFOAM) & Research Institute of Organic Agriculture (FiBL).
- Stolz, H. and Schmid, O. (2007): Organic viticulture and wine-making: development of environment and consumer friendly technologies for organic wine quality improvement and scientifically based legislative framework. D 2.7 Public report about first round qualitative consumer research and market needs. <http://orgprints.org/10608/>