Supplementary data

WINE INTELLIGENCE

Wine consumers' perceptions and reactions towards labelling ingredients on wine bottles

Report: Australian market, April 2021

OEnoppia

INTRODUCTION

Study findings are reported through 11 reports:

1. USA
2. Australia — This report
3. Japan
4. France
5. Germany
6. Italy
7. Russia
8. Spain
9. Sweden
10. UK
11. Multi-market management summary

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

RESEARCH OBJECTIVES

The overall objective of this study is to assess consumers' perceptions, attitudes and opinions of wine ingredients labelling

Four specific objectives have been assigned to this study:

1. Assess consumers' perceptions and knowledge of winemaking practices.

2. Asses the impact of labelling ingredients on purchase consideration and imagery of a tried and liked wine (impact on brand loyalty) and on an unknown wine (impact on new consumer acquisition).

3. Assess the impact of two levels of information: a short vs long list of ingredients.

4. Assess the level of consumer acceptance for specific ingredients.

METHODOLOGY: DATA COLLECTION

Consumer survey: data gathered via the Vinitrac® Australia omnibus survey platform:

- **Scope:** all wine drinkers living in Australia who drink wine at least once a month.
- **Sampling:** quota-based sample (age, gender and region of residence).
- **Data collection mode:** online.
- **Dates of data collection:** from 28th January to 14th February 2021.
- **Sample size** (after cleaning and weighting procedures): 1,003 respondents.
- Sample profile is shown in the table:

Gender	Male	58%
	Female	42%
	Total	100%
Age	18-24	8%
	25-34	21%
	35-44	23%
	45-54	18%
	55-64	11%
	65 and above	18%
	Total	100%
Region of residence	Australian Capital Territory	2%
	New South Wales	36%
	Northern Territory	1%
	Queensland	19%
	South Australia	6%
	Tasmania	2%
	Victoria	25%
	Western Australia	9%
	Total	100%

STUDY CONTEXT: MARKET SIZE

The survey is representative of the 9.2 million adults living in Australia who drink wine at least once a month.

	Adult population (millions)	% drink still wine*	Survey is representative of … **million wine drinkers**	
USA	241	32%	77	
Australia	18.2	50%	9.2	→ This report
Japan	105.1	22%	23.1	
France	51	75%	38	
Germany	66.2	42%	27.5	
Italy	49.7	62%	31	
Russia	16.3	46%	7.5	
Spain	38	50%	18.9	
Sweden	7.9	55%	4.3	
UK	52.4	49%	25.9	
Total	**646**	**41%**	**262**	

*% drink red, white or rosé wine at least once a month, except in two markets:

- France: all wine drinkers who live in France (exc. Corsica and overseas territories)
- Russia: all imported wine drinkers (at least twice per year), aged between 18 and 64 years old, living in Moscow and St Petersburg

[1] Source : national statistics

[2] Source : Wine Intelligence, calibration surveys

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

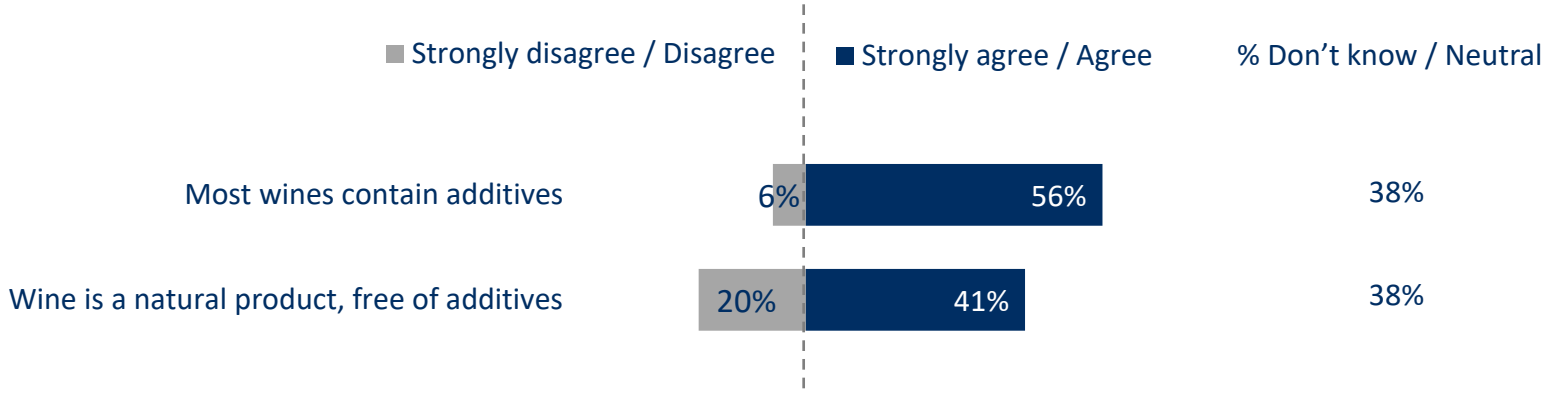
WINEMAKING PERCEPTIONS AND KNOWLEDGE (1/3)

56% of consumers think that wine contains additives and very few (6%) believe that it doesn't. Another 41% perceive wine as being a 'natural' product, free of additives.

Winemaking process perceptions and knowledge (1/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all Australian monthly wine drinkers (n=1,003)

Presence of additives in wine



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

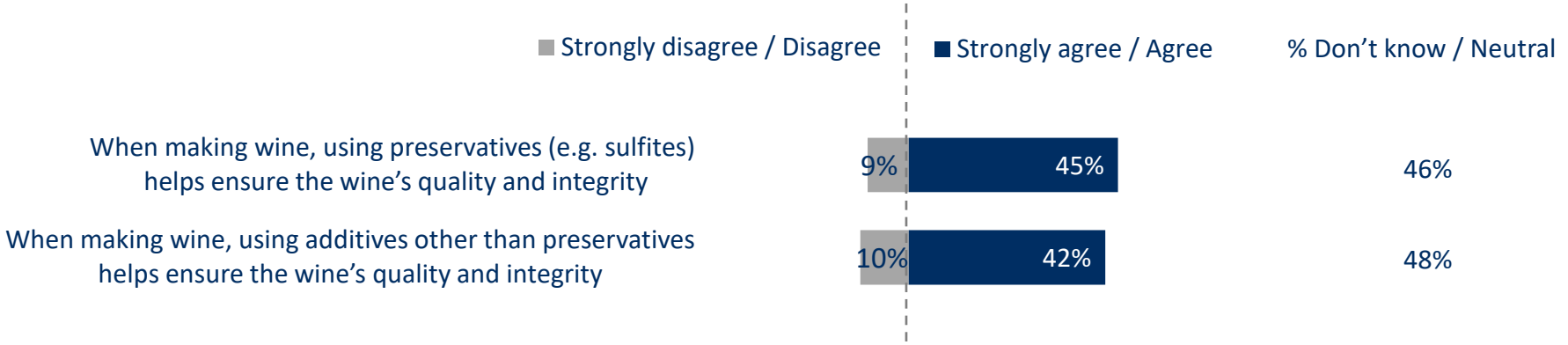
WINEMAKING PERCEPTIONS AND KNOWLEDGE (2/3)

Regarding the usefulness of using additives in wine, the most common views are either neutrality or agreement. Very few clearly disagree with the idea of its usefulness.

Winemaking process perceptions and knowledge (2/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all Australian monthly wine drinkers (n=1,003)

Usefulness of additives in winemaking process



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

WINEMAKING PERCEPTIONS AND KNOWLEDGE (3/3)

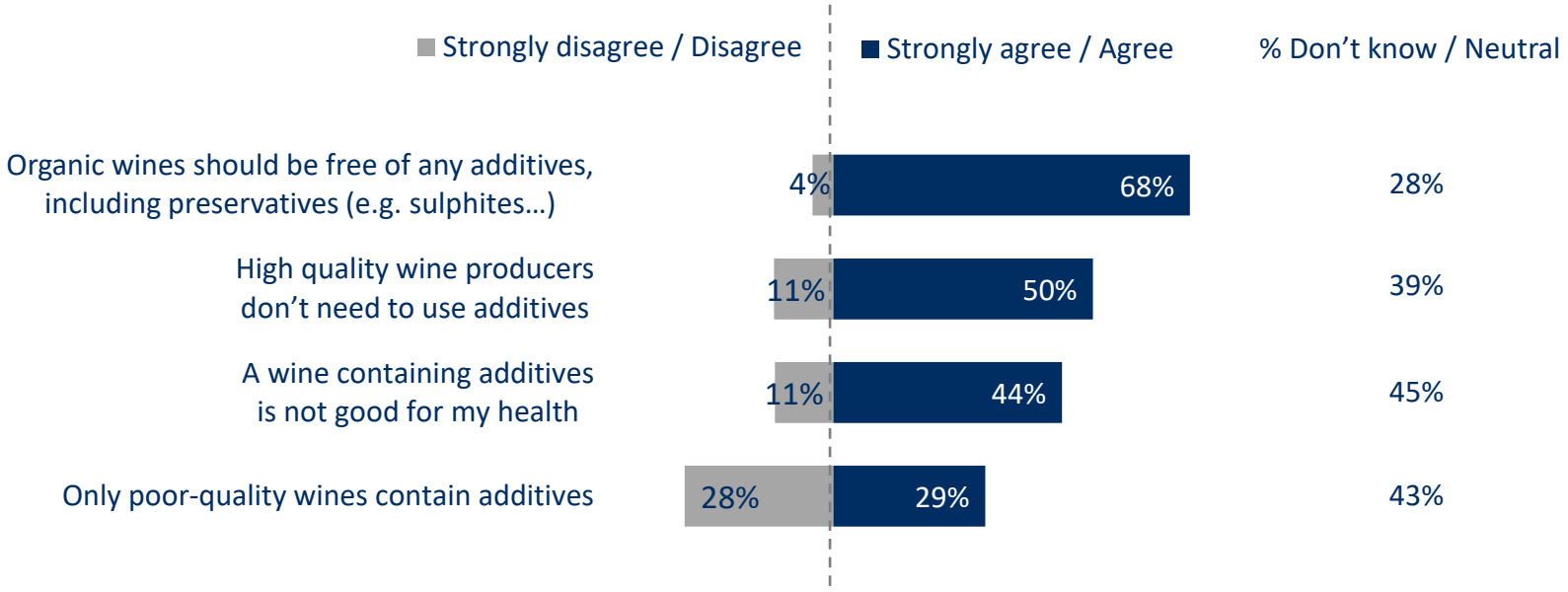
Excluding organic wines, 50% of consumers believe that high quality wines don't need to use additives. And only 29% believe that only poor quality wines contain additives. This suggests that most consumers accept the idea of the presence of additives in at least low to mid quality wines.

It's noteworthy that 44% have concerns about the impact of additives on their health.

Winemaking process perceptions and knowledge (3/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all Australian monthly wine drinkers (n=1,003)

Wine additives: quality and health



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
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   - Red wine
   - White wine
   - Sparkling wine
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7. Appendices

METHODOLOGY: IMPACT OF WINE INGREDIENTS LABELLING ON A TRIED AND LIKED WINE – QUESTIONNAIRE STRUCTURE

All respondents

Respondents were asked to think about a wine they regularly buy and love drinking.

- Q2: favourite wine style (red wine / white wine / rosé wine)
- Q3: favourite wine perceptions / imagery (10 statements, using a 1-5 scale)

Respondents are informed that the back label exhibits the wine's ingredients.
Each respondent has been randomly assigned to one of the three following scenarios:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients:
"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients:
"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

- Q4: changes in opinion (1 to 5 scale)
- Q5: changes in intent to buy (1 to 5 scale)
- Q6: changes in imagery (10 statements, 1 to 5 scales)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON OVERALL OPINION

On average, the disclosure of ingredients will drive down the opinion amongst 21% of consumers. And 39% are either neutral or unsure about how to interpret it.

Findings suggest that this negative impact is highest for 'contains sulfites'. (note: difference vs average is not statistically significant).

Known and liked wine: impact of wine ingredients labelling on overall opinion

Question: Now knowing the ingredients it contains, does it change your opinion about this wine?
Base: all Australian monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈330 per scenario)

	Average across the three lists	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***1,003***	*336*	*336*	*331*
No, it doesn't change my opinion at all	**19%**	17%	21%	21%
No, it doesn't change my opinion much	**27%**	23%	26%	33%
It may change my opinion, I am not sure	**32%**	35%	34%	27%
Yes, it gives me a lower opinion of it	**15%**	18%	12%	13%
Yes, it gives me a rather poor opinion of it	**7%**	7%	6%	7%
Total	**100%**	100%	100%	100%

% lower / rather poor opinion	**21%**	**25%**	**19%**	**19%**

Red / Blue : significantly higher / lower than 'Average across the 3 lists' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON INTENT TO BUY

On average, the disclosure of ingredients of a favourite wine would yield 14% of consumers to be unwilling to buy it again. And 23% would hesitate or be unsure.

Interestingly, the negative impact of ingredients labelling is higher for 'contains sulfites' only (only 25% state they would definitely buy the wine again).

Known and liked wine: impact of wine ingredients labelling on intent to buy

Question: And how likely would you be to repurchase this wine in the future?
Base: all Australian monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈330 per scenario)

	Average across the three lists	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***1,003***	*336*	*336*	*331*
I would definitely buy it again	**33%**	25%	38%	35%
I would probably buy it again	**32%**	33%	30%	32%
I would hesitate to buy it again	**16%**	18%	13%	15%
I would probably not buy it again	**8%**	8%	7%	8%
I would definitely not buy it again	**6%**	8%	6%	3%
I don't know / not sure	**7%**	8%	7%	5%
Total	**100%**	100%	100%	100%

% probably not buy / definitely not buy again	**14%**	**16%**	**13%**	**12%**

Red / Blue : significantly higher / lower than 'Average across the 3 lists' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON IMAGERY

Disclosing the list of ingredients on the back label does not seem to have a big impact on imagery. A long list of ingredients will do so for several items (taste, quality, confidence), though ratings remain high.

Known and liked wine: impact of wine ingredients labelling on imagery

Question: Now knowing the ingredients it contains, please indicate the extent to which you feel that each of the following statements are appropriate to describe your FAVOURITE wine on a 1 to 5 scale where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Australian monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈330 per scenario)

% Appropriate / Very appropriate	Known and liked wine	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	*1,003*	*336*	*336*	*331*
A taste I like	92%	89%	90%	88%
Very good quality	87%	85%	84%	82%
Good value for money	86%	82%	87%	83%
A wine I am never disappointed with	85%	82%	82%	78%
A wine that I am proud to serve to my friends/family	83%	82%	82%	78%
A wine I enjoy for everyday drinking	81%	80%	81%	79%
Made by a producer that I trust	79%	78%	76%	77%
A wine produced with care	75%	74%	75%	72%
A wine that inspires confidence	63%	66%	64%	63%
A wine produced in an environmentally friendly way	53%	58%	55%	57%

Initial positive views tend to mostly shift to negative opinions.

Red / Blue : significantly higher / lower than 'Known and liked wine' (confidence interval: 95%)

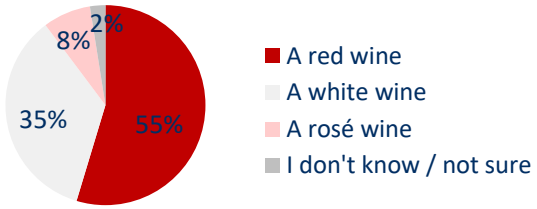
Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

KNOWN AND LIKED WINE: FINDINGS SUMMARY BY WINE TYPE PREFERENCE

The negative impact of ingredient labelling does not vary much between wine types

Known and liked wine: by wine type

Question: Please think about your FAVOURITE wine brand or producer, i.e. a wine that you regularly buy and that you love drinking. Is this wine:
Base: all Australian monthly wine drinkers (n=1,003)



Overall opinion: % lower / rather poor opinion

	Average	Contains sulfites	Short list	Long list
Base:	***1,003***	*336*	*336*	*331*
Red	**21%**	25%	18%	21%
White	**22%**	27%	21%	18%
Rosé	**23%**	29%	18%	23%
Average all styles	**21%**	**25%**	**19%**	**19%**

Intent to buy: % probably not buy / definitely not buy again

	Average	Contains sulfites	Short list	Long list
Base:	***1,003***	*336*	*336*	*331*
Red	**14%**	15%	12%	15%
White	**14%**	18%	15%	9%
Rosé	**15%**	25%	13%	10%
Average all styles	**14%**	**16%**	**13%**	**12%**

Red / Blue : significantly higher / lower than 'Average all colours' (confidence interval: 95%) - Grey: small sample size (n<50)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine :
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY : IMPACT OF WINE INGREDIENTS LABELLING ON A NEW WINE – QUESTIONNAIRE STRUCTURE

We asked respondents to imagine they are in a shop and that they spot a wine that seems to match the type of wine they like to drink. Each respondent was randomly assigned to 1 of the 3 possible scenarios of back labels:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"



"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

Each respondent was shown either a **white** wine (≈50% of respondents) or a **red** wine (≈50% of respondents) back label.

Q7: new wine – consideration to buy (1 to 5 scale)

Q8: new wine – price range perception (scale ranging from 'very low end' to 'very high-end')

Q9: new wine – perceptions / imagery (8 statements, using a scale)

Note: back labels are shown in the appendix.

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

RED WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

The shift from 'contains sulfites' to a short list of ingredients yields a higher likelihood of trialling a new wine: consumers tend to be less neutral about it.

A long list doesn't seem to yield significant changes.

Red wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this wine?
Base: all Australian monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***160***	*167*	*159*
I would consider / strongly consider buying it	**45%**	53%	48%
I may consider buying it	**39%**	28%	34%
I would probably not / definitely not consider buying it	**13%**	15%	13%
I don't know / not sure	**4%**	3%	5%
Total	**100%**	100%	100%
Net (% would buy - % would not consider buying)	**32%**	**37%**	**36%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

RED WINE BACK LABEL : IMPACT OF WINE INGREDIENTS LABELLING (2/3)

The format of the wine ingredient list doesn't seem to significantly impact the perceived price of an unknown wine.

Red wine back label: impact of ingredients labelling on price perceptions

Question: This wine is probably…
Base: all Australian monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***160***	*167*	*159*
Very high-end	**5%**	7%	7%
High end	**25%**	32%	28%
Average	**55%**	47%	49%
Low end	**6%**	4%	7%
Very low-end	**0%**	1%	1%
I don't know / not sure	**9%**	10%	9%
Total	**100%**	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

RED WINE BACK LABEL : IMPACT OF WINE INGREDIENTS LABELLING (3/3)

A wine with a long list of ingredients is perceived as being less likely to taste good than one with less ingredients.

Interestingly, a wine with a short list of ingredients is more likely to inspire confidence than the 'contains sulfites' labelling format.

Red wine back label: impact of ingredients labelling on wine imagery

Question: Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Australian monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈160)

% Appropriate / Very appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base:	***160***	*167*	*159*
It probably tastes good	**79%**	78%	67%
A wine I would probably enjoy for everyday drinking	**71%**	67%	65%
A wine that seems to be produced with care	**64%**	70%	64%
A wine I would probably be proud to serve to friends	**59%**	69%	64%
It probably is of high quality	**58%**	63%	61%
It probably is an ordinary wine	**50%**	42%	46%
A wine that is probably produced in an environmentally friendly way	**48%**	52%	52%
It inspires confidence	**46%**	59%	49%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

Findings suggest that the shift from 'contains sulfites' to a short or long list of ingredients yields consumers to be less negative than 'contains sulfites'. (note: indicative findings only as differences are not statistically different).

White wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this wine?
Base: all Australian monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***176***	*169*	*172*
I would consider / strongly consider buying it	**49%**	50%	56%
I may consider buying it	**28%**	34%	23%
I would probably not / definitely not consider buying it	**18%**	12%	14%
I don't know / not sure	**5%**	4%	7%
Total	**100%**	100%	100%

Net impact (% would buy - % would not consider buying)	**31%**	**37%**	**42%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (2/3)

The format of the wine ingredients labelling doesn't seem to impact the perceived price much.

White wine back label: impact of ingredients labelling on price perceptions

Question: This wine is probably…
Base: all Australian monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***176***	*169*	*172*
Very high-end	**7%**	5%	8%
High end	**27%**	30%	27%
Average	**51%**	50%	47%
Low end	**4%**	3%	6%
Very low-end	**1%**	1%	0%
I don't know / not sure	**10%**	11%	11%
Total	**100%**	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (3/3)

Consumers perceive few differences between the three lists. However, findings suggest that a long list of ingredients is slightly less likely to be perceived as tasting good (67% vs 75%). (note : differences are not statistically significant).

White wine back label: impact of ingredients labelling on wine imagery

Question: Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Australian monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈160)

% Appropriate / Very appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base:	***176***	*169*	*172*
It probably tastes good	**75%**	75%	67%
A wine I would probably enjoy for everyday drinking	**70%**	70%	63%
A wine that seems to be produced with care	**67%**	71%	65%
A wine I would probably be proud to serve to friends	**62%**	62%	63%
It probably is of high quality	**61%**	61%	57%
It inspires confidence	**53%**	54%	54%
A wine that is probably produced in an environmentally friendly way	**53%**	60%	52%
It probably is an ordinary wine	**50%**	49%	43%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

CONTENTS

1. Objectives and methodology
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3. Impact of wine ingredients labelling on a tried (and liked) wine
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   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY: IMPACT OF WINE INGREDIENTS LABELLING ON A NEW SPARKLING WINE – QUESTIONNAIRE STRUCTURE

Respondents were asked to imagine they are in a shop and that they spot a wine that seems to match the type of sparkling wine they like to drink. Each respondent is (randomly) shown one of the 3 possible **sparkling wine** back labels:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"



"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

- Q10: new wine – consideration to buy (1 to 5 scale)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1003 wine drinkers)

SPARKLING WINE: IMPACT OF INGREDIENTS LABELLING

The ingredients labelling format doesn't significantly impact the consideration to buy an unknown sparkling wine.

Sparkling wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this sparkling wine?
Base: all Australian monthly wine drinkers (randomly) assigned to one of the 3 possible sparkling wine back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***336***	*336*	*331*
I would consider / strongly consider buying it	**44%**	45%	45%
I may consider buying it	**26%**	26%	30%
I would probably not / definitely not consider buying it	**24%**	25%	20%
I don't know / not sure	**6%**	4%	5%
Total	**100%**	100%	100%
Net (% would buy - % would not consider buying)	***20%***	*20%*	*25%*

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
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   - White wine
   - Sparkling wine
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7. Appendices

SPECIFIC WINE INGREDIENTS ACCEPTANCE: METHODOLOGY

We asked respondents to imagine they are in a shop and that they spot a wine that seems to match the type of wine they like to drink. Each respondent is (randomly) assigned to one of the two following scenarios:

Scenario 1 (≈50% of respondents)

Respondents are exposed to a list of ingredients, with no information.

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)
- Tartaric acid
- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate

Scenario 2 (≈50% of respondents)

Respondents are exposed to the same list but with short explanations.

Ingredients used to better preserve the wine:

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)

Ingredients used to better maintain the quality of the wine (stabilise it and / or regulate its level of acidity):

- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate
- Tartaric acid

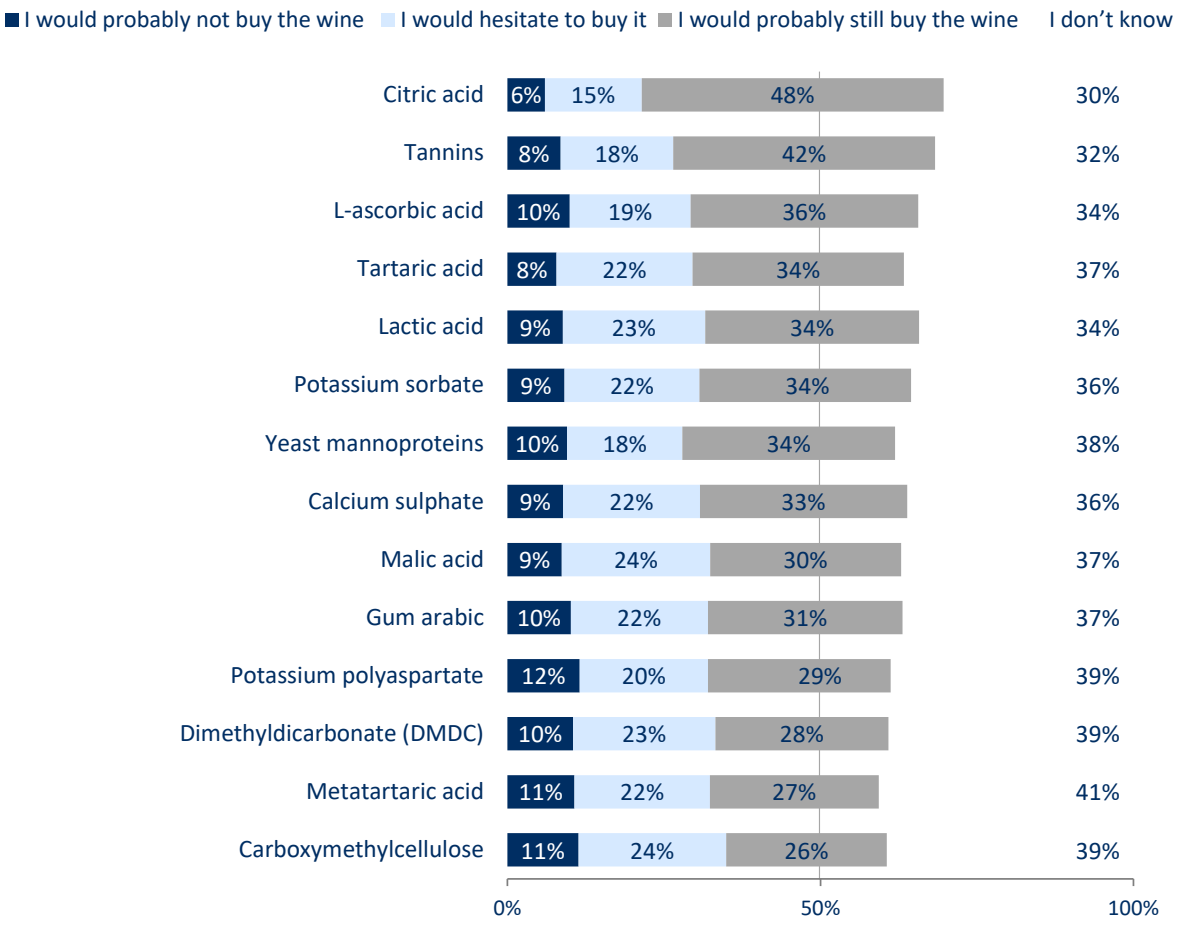
Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

ACCEPTANCE OF SPECIFIC INGREDIENTS: WITHOUT INFORMATION

Citric acid is the most accepted ingredient (48% would still buy the wine vs 33% on average). The other ingredients tend to yield uncertain views or acceptance, far more so than outright rejection.

Acceptance of specific wine ingredients: without information

Question: For each of these ingredients, what would your reaction be? Base : all Australian monthly wine drinkers (randomly) assigned to the scenario ' No information' (n=506)



	Average scores
Base:	*506*
% 'Still buy'	33%
% 'Hesitate'	21%
% 'Not buy'	9%
% 'Don't know'	36%

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

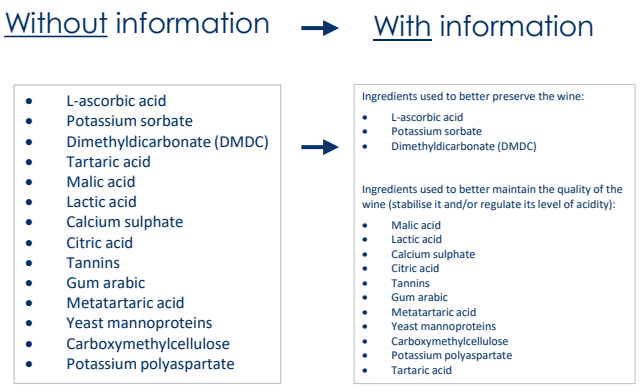
ACCEPTANCE OF SPECIFIC INGREDIENTS: IMPACT OF EDUCATION

For several ingredients, explaining why they are used increases acceptance. For example, the rate of acceptance of citric acid raises from 48% to 58% (+10 pts).

Acceptance of specific wine ingredients: impact of education

Question: For each of these ingredients, what would your reaction be?
Base: all Australian monthly wine drinkers (randomly) assigned to the scenario ' Short explanation' (n=496)

	% I would probably not buy the wine	% I would hesitate to buy it	% I would probably still buy the wine	% I don't know / not sure
Citric acid	ns	ns	+10 pts	-6 pts
Tannins	-4 pts	ns	ns	ns
L-ascorbic acid	-7 pts	ns	+13 pts	ns
Tartaric acid	ns	-5 pts	+12 pts	-6 pts
Lactic acid	ns	ns	+8 pts	ns
Potassium sorbate	-4 pts	ns	+6 pts	ns
Yeast mannoproteins	-5 pts	ns	+11 pts	-7 pts
Calcium sulphate	ns	ns	+9 pts	ns
Malic acid	ns	ns	ns	ns
Gum arabic	ns	ns	ns	ns
Potassium polyaspartate	ns	ns	ns	ns
Dimethyldicarbonate (DMDC)	-4 pts	ns	+7 pts	ns
Metatartaric acid	-5 pts	ns	+7 pts	ns
Carboxymethylcellulose	-5 pts	ns	ns	ns



ns = not significant

Red / Blue : significantly higher / lower than 'Without information' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

CONCLUSIONS: KEY TAKEAWAYS

- Most consumers don't reject the idea of the use of additives in the winemaking process.

  Most either recognise or are neutral regarding the presence of additives in wines. Similarly, they will mostly agree or be neutral regarding the usefulness of additives in the winemaking process.

- However, 50% believe that good quality wines don't need additives and 44% express concerns regarding their impact on health. Providing reassurance on both counts are key points to consider.

- The disclosure of ingredients of a known and trusted wine yields more uncertainty than rejection.

  14% of consumers state they would stop buying the wine and **23% would hesitate**. The disclosure of a long list of ingredients will drive down imagery for several items (taste, quality, confidence), though ratings remain high.

- The disclosure of all ingredients doesn't impact very much the consideration to buy an unknown red wine.

  Shifting from 'contains sulfites' to a **short list** of ingredients raises confidence level with the brand and findings suggest that consideration to buy the wine may increase slightly. However, a long list of ingredients tends to harm wine imagery: it makes it less likely to deliver a good taste.

- The disclosure of all ingredients doesn't impact very much the consideration to buy an unknown white wine, though findings suggest that shifting from 'contains sulfites' to a short or a long list may yield consumers to be slightly less negative about the wine.

- Regarding specific ingredients, **citric acid** is the most accepted. For other ingredients, the most common reactions are uncertainty (36%) or acceptance (33%), more so than rejection. Education (i.e. explaining why ingredients are used) increases the level of acceptance for several ingredients.

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices
   - New wine: back labels shown to respondents
   - New wine: average findings (white + white wine merged)

APPENDIX : METHODOLOGY – TESTED BACK LABELS (STILL WINE)

Red wine back label:







White wine back label:







Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

APPENDIX : METHODOLOGY – TESTED BACK LABELS (SPARKLING WINE)

Sparkling wine back label:







Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices
   - Trialling a new wine: back labels shown to respondents
   - Trialling a new wine: average findings (white + white wine merged)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

Still (white + red) wine back label: impact of ingredients labelling on consideration to buy

Question : To what extent would you consider buying this wine?
Base: all Australian monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*336*	*336*	*331*
I would consider / strongly consider buying it	47%	52%	52%
I may consider buying it	33%	31%	28%
I would probably not / definitely not consider buying it	16%	14%	14%
I don't know / not sure	4%	3%	6%
Total	100%	100%	100%
Net impact (% would buy - % would not consider buying)	**31%**	**38%**	**39%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (2/3)

Still (white + red) wine back label : impact of ingredients labelling on price perceptions

Question : This wine is probably…
Base: all Australian monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*336*	*336*	*331*
Very high-end	6%	6%	7%
High end	26%	31%	27%
Average	53%	48%	48%
Low end	5%	4%	7%
Very low-end	0%	1%	0%
I don't know / not sure	10%	10%	10%
Total	100%	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (1/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% appropriate / very appropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Australian monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% Appropriate / Very appropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*336*	*336*	*331*
It probably tastes good	77%	77%	67%
A wine I would probably enjoy for everyday drinking	70%	69%	64%
A wine that seems to be produced with care	66%	71%	65%
A wine I would probably be proud to serve to friends	61%	66%	63%
It probably is of high quality	60%	62%	59%
A wine that is probably produced in an environmentally friendly way	51%	56%	52%
It inspires confidence	50%	56%	52%
It probably is an ordinary wine	50%	46%	44%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (2/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% neither appropriate not inappropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Australian monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% Neither appropriate nor inappropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*336*	*336*	*331*
It probably tastes good	14%	16%	19%
A wine I would probably enjoy for everyday drinking	18%	18%	20%
A wine that seems to be produced with care	23%	19%	20%
A wine I would probably be proud to serve to friends	27%	21%	20%
It probably is of high quality	28%	25%	24%
A wine that is probably produced in an environmentally friendly way	28%	26%	28%
It inspires confidence	35%	32%	28%
It probably is an ordinary wine	31%	33%	31%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (3/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% not / not at all appropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Australian monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% Not appropriate / Not at all appropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*336*	*336*	*331*
It probably tastes good	3%	3%	5%
A wine I would probably enjoy for everyday drinking	7%	8%	8%
A wine that seems to be produced with care	4%	5%	6%
A wine I would probably be proud to serve to friends	4%	7%	8%
It probably is of high quality	5%	6%	8%
A wine that is probably produced in an environmentally friendly way	8%	8%	8%
It inspires confidence	7%	7%	10%
It probably is an ordinary wine	10%	15%	14%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (4/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% I don't know / not sure)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Australian monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% I don't know / not sure	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*336*	*336*	*331*
It probably tastes good	6%	4%	9%
A wine I would probably enjoy for everyday drinking	6%	5%	8%
A wine that seems to be produced with care	7%	5%	9%
A wine I would probably be proud to serve to friends	8%	6%	9%
It probably is of high quality	7%	7%	9%
A wine that is probably produced in an environmentally friendly way	13%	10%	13%
It inspires confidence	7%	5%	11%
It probably is an ordinary wine	9%	6%	10%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (5/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Australian monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

Net impact (positive - negative)	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*336*	*336*	*331*
It probably tastes good	74%	73%	62%
A wine I would probably enjoy for everyday drinking	64%	61%	56%
A wine that seems to be produced with care	62%	65%	59%
A wine I would probably be proud to serve to friends	57%	60%	55%
It probably is of high quality	55%	57%	51%
A wine that is probably produced in an environmentally friendly way	43%	48%	44%
It inspires confidence	43%	49%	42%
It probably is an ordinary wine	40%	31%	30%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Australia (n=1,003 wine drinkers)

Connecting wine businesses with knowledge and insights globally

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WINE INTELLIGENCE

Wine consumers' perceptions and reactions towards labelling ingredients on wine bottles

Report: French market, April 2021

OEnoppia

INTRODUCTION

Study findings are reported through 11 reports:

1. USA
2. Australia
3. Japan
4. France — This report
5. Germany
6. Italy
7. Russia
8. Spain
9. Sweden
10. UK
11. Multi-market management summary

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

RESEARCH OBJECTIVES

The overall objective of this study is to assess consumers' perceptions, attitudes and opinions of wine ingredients labelling

Four specific objectives have been assigned to this study:

1. Assess consumers' perceptions and knowledge of winemaking practices.

2. Asses the impact of labelling ingredients on purchase consideration and imagery of a tried and liked wine (impact on brand loyalty) and on an unknown wine (impact on new consumer acquisition).

3. Assess the impact of two levels of information: a list short vs a long of ingredients.

4. Assess the level of consumer acceptance for specific ingredients.

METHODOLOGY: DATA COLLECTION

Consumer survey: data gathered via the Vinitrac® France omnibus survey platform:

- **Scope:** all wine drinkers living in France (exc. Corsica and overseas territories) who drink wine.
- **Sampling:** quota-based sample (age, gender, income and region of residence).
- **Data collection mode:** online.
- **Dates of data collection:** from 18th February to 25th February 2021.
- **Sample size** (after cleaning and weighting procedures): 1,503 respondents.
- Sample profile is shown in the table:

Gender	Male	52%
	Female	48%
	Total	100%
Age	18-24	8%
	25-34	14%
	35-44	15%
	45-54	17%
	55-64	18%
	65 and above	27%
	Total	100%
Net monthly household income*	Low (1799€ and below)	16%
	Average - Low (1800€ - 2499€)	19%
	Average (2500€ - 2999€)	20%
	Average - High (3000€ - 3999€)	22%
	High (4000€ et +)	22%
	Total	100%
Region of residence	Paris area	18%
	West of Paris area	9%
	East of Paris area	7%
	North	6%
	West	14%
	East	8%
	South West	12%
	South East	14%
	Mediterranea	13%
	Total	100%

*'Prefer not to answer' excluded from base

STUDY CONTEXT: MARKET SIZE

The survey is representative of the 38 million adults living in France who drink wine.

	Adult population (millions)	% drink still wine*	Survey is representative of … **million wine drinkers**
USA	241	32%	77
Australia	18.2	50%	9,2
Japan	105,1	22%	23,1
France	51	75%	38
Germany	66,2	42%	27,5
Italy	49,7	62%	31
Russia	16,3	46%	7,5
Spain	38	50%	18,9
Sweden	7,9	55%	4,3
UK	52,4	49%	25,9
Total	**646**	**41%**	**262**

→ This report

*% drink red, white or rosé wine at least once a month, except in two markets:

- France: all wine drinkers who live in France (exc. Corsica and overseas territories)
- Russia: all imported wine drinkers (at least twice per year), aged between 18 and 64 years old, living in Moscow and St Petersburg

[1] Source : national statistics

[2] Source : Wine Intelligence, calibration surveys

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

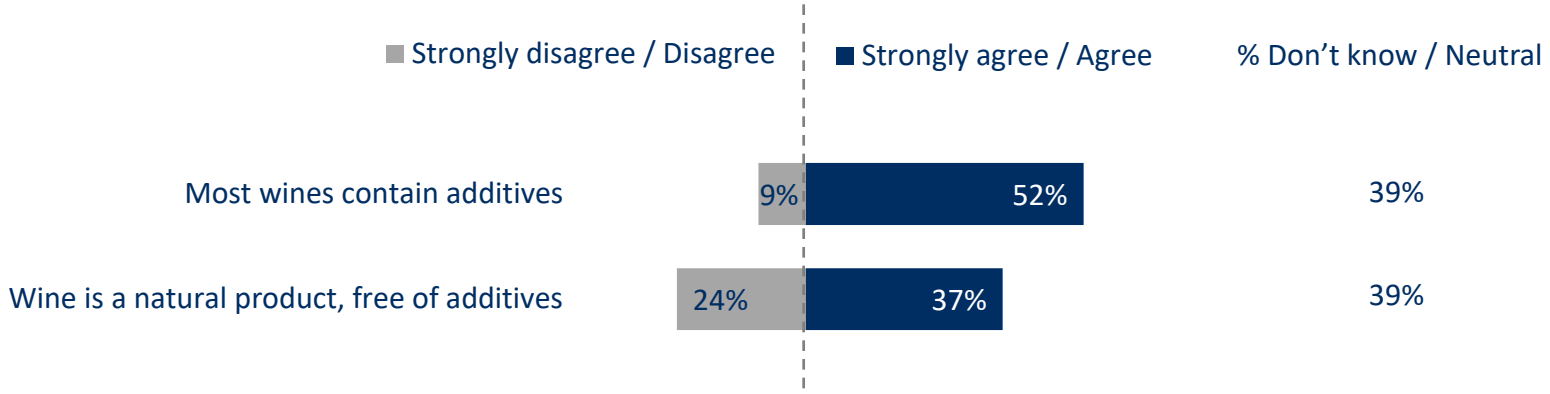
WINEMAKING PERCEPTIONS AND KNOWLEDGE (1/3)

52% of consumers are aware that wine contains additives and very few (9%) believe that it doesn't. Only 37% perceive wine as being a 'natural' product', free of additives.

Winemaking process perceptions and knowledge (1/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all French wine drinkers (n=1,503)

Presence of additives in wine



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

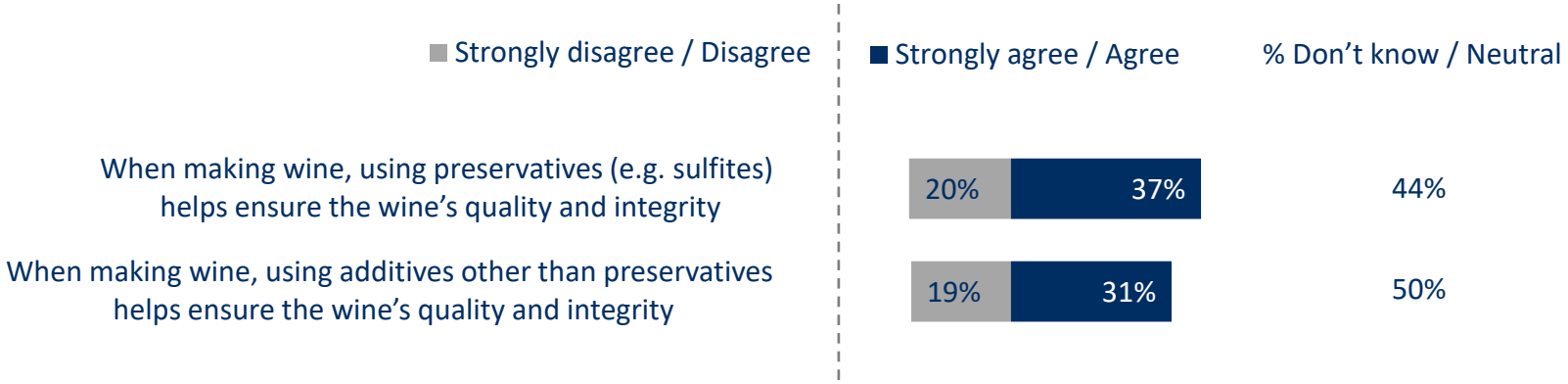
WINEMAKING PERCEPTIONS AND KNOWLEDGE (2/3)

Regarding the usefulness of using additives in wine, the most common view is neutrality. About 1 in 3 perceive additives as being helpful in the winemaking process, vs 20% saying they're not useful. These findings indicate that most wine consumers are not rejecting the idea that additives may be useful in the winemaking process.

Winemaking process perceptions and knowledge (2/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all French wine drinkers (n=1,503)

Usefulness of additives in winemaking process



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

WINEMAKING PERCEPTIONS AND KNOWLEDGE (3/3)

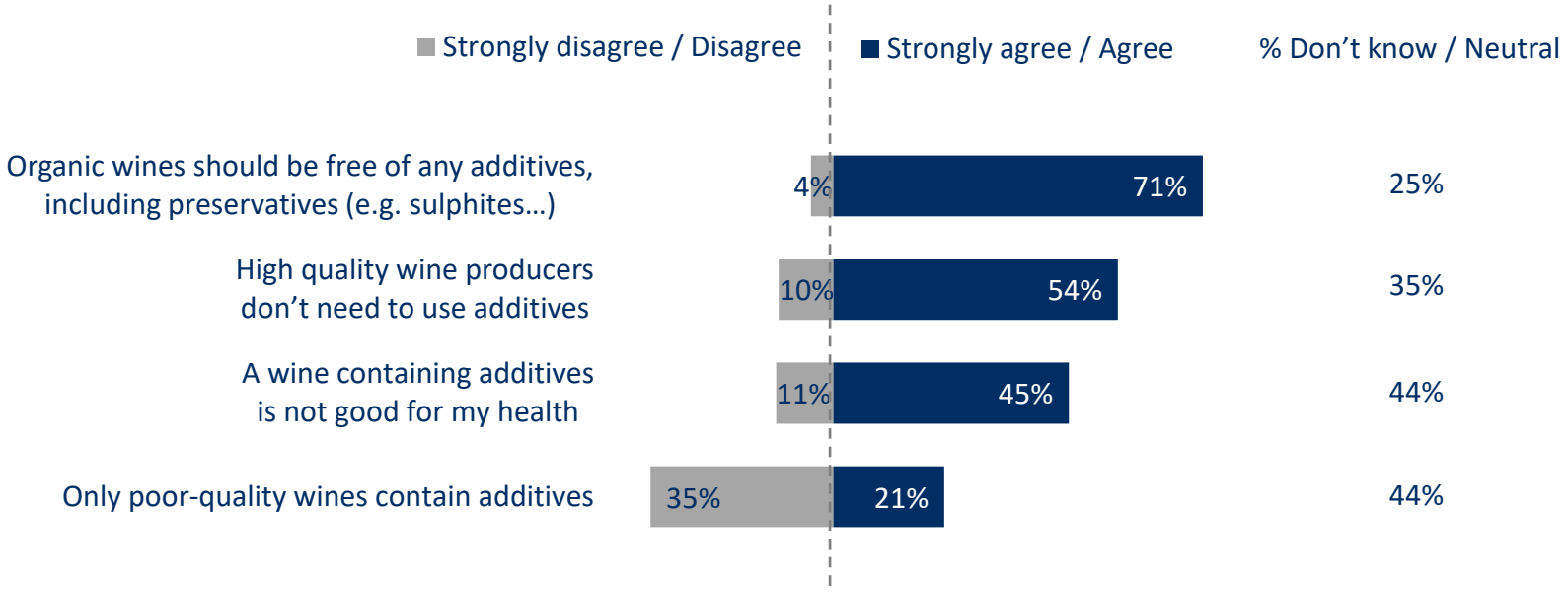
Apart from organic wines, about half of consumers believe that high quality wines don't need to use additives. However, only 21% believe that only poor quality wines contain additives. This suggests that the majority of wine consumers are either neutral or accepting the presence of additives in wine.

However, almost half of consumers (45%) have concerns about the impact of additives on their health.

Winemaking process perceptions and knowledge (3/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all French wine drinkers (n=1,503)

Wine additives: quality and health



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY: IMPACT OF WINE INGREDIENTS LABELLING ON A TRIED AND LIKED WINE – QUESTIONNAIRE STRUCTURE

All respondents

Respondents were asked to think about a wine they regularly buy and love drinking.

- Q2: favourite wine style (red wine / white wine / rosé wine)
- Q3: favourite wine perceptions / imagery (10 statements, using a 1-5 scale)

Respondents are informed that the back label exhibits the wine's ingredients.
Each respondent has been randomly assigned to one of the three following scenarios:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients:
"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients:
"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

- Q4: changes in opinion (1 to 5 scale)
- Q5: changes in intent to buy (1 to 5 scale)
- Q6: changes in imagery (10 statements, 1 to 5 scales)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON OVERALL OPINION

On average, the disclosure of ingredients will drive down the opinion amongst 22% of consumers. Interestingly, this negative impact is higher for 'contains sulfites' (26% of lower opinion), compared to a short or a long list of ingredients (18% and 21% of lower opinion).

Known and liked wine: impact of wine ingredients labelling on overall opinion

Question: Now knowing the ingredients it contains, does it change your opinion about this wine?
Base: all French wine drinkers (randomly) assigned to one of the three scenarios (n≈500 per scenario)

	Average across the three lists	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***1,503***	*509*	*495*	*500*
No, it doesn't change my opinion at all	**13%**	11%	16%	13%
No, it doesn't change my opinion much	**30%**	27%	32%	30%
It may change my opinion, I am not sure	**35%**	36%	34%	36%
Yes, it gives me a lower opinion of it	**16%**	17%	15%	16%
Yes, it gives me a rather poor opinion of it	**6%**	9%	3%	5%
Total	**100%**	100%	100%	100%

% lower / rather poor opinion	**22%**	**26%**	**18%**	**21%**

Red / Blue : significantly higher / lower than 'Average across the 3 lists' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON INTENT TO BUY

On average, the disclosure of ingredients of a favourite wine would yield 9% of consumers to be unwilling to buy it again. And 26% would hesitate.

Interestingly, this negative impact (i.e. rate of rejection) is lower when disclosing the full list of ingredients vs 'contains sulfites'.

Known and liked wine: impact of wine ingredients labelling on intent to buy

Question: And how likely would you be to repurchase this wine in the future?
Base: all French wine drinkers (randomly) assigned to one of the three scenarios (n≈500 per scenario)

	Average across the three lists	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***1,503***	*509*	*495*	*500*
I would definitely buy it again	**27%**	22%	28%	30%
I would probably buy it again	**33%**	33%	35%	30%
I would hesitate to buy it again	**26%**	28%	24%	26%
I would probably not buy it again	**6%**	8%	5%	6%
I would definitely not buy it again	**3%**	4%	2%	2%
I don't know / not sure	**6%**	6%	6%	6%
Total	**100%**	100%	100%	100%

% probably not buy / definitely not buy again	**9%**	**12%**	**7%**	**8%**

Red / Blue : significantly higher / lower than 'Average across the 3 lists' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON IMAGERY

Disclosing the list of ingredients on the back label drives imagery perceptions down. The negative impact is higher for a long list of ingredients.

Known and liked wine: impact of wine ingredients labelling on imagery

Question: Now knowing the ingredients it contains, please indicate the extent to which you feel that each of the following statements are appropriate to describe your FAVOURITE wine on a 1 to 5 scale where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all French wine drinkers (randomly) assigned to one of the three scenarios (n≈500 per scenario); those answering 'don't know' excluded

% Appropriate / Very appropriate	Known and liked wine	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	*1,503*	*509*	*495*	*500*
A taste I like	91%	85%	88%	84%
Very good quality	88%	79%	82%	75%
A wine I am never disappointed with	88%	82%	84%	79%
A wine that inspires confidence	86%	78%	80%	71%
Good value for money	84%	79%	82%	76%
A wine that I am proud to serve to my friends/family	84%	79%	80%	74%
A wine produced with care	82%	77%	77%	72%
Made by a producer that I trust	78%	72%	76%	71%
A wine produced in an environmentally friendly way	71%	66%	67%	63%
A wine I enjoy for everyday drinking	69%	70%	71%	67%

Initial positive views shifting towards:

With "contains sulfites" or the "short list", views tend to mostly shift to neutral positions, less so to negatives ones.

With the "long list", positive views shift almost evenly towards neutral and negative views. Which means that the negative impact is more important vs a short list.

Red / Blue : significantly higher / lower than 'Known and liked wine' (confidence interval: 95%)

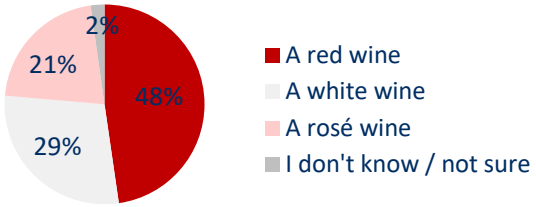
Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

KNOWN AND LIKED WINE: FINDINGS SUMMARY BY WINE TYPE PREFERENCE

The negative impact of a long list of ingredients is higher for a red wine.

Known and like wine: by wine type

Question: Please think about your FAVOURITE wine brand or producer, i.e. a wine that you regularly buy and that you love drinking. Is this wine:
Base: all French wine drinkers (n=1,503)



Overall opinion: % lower / rather poor opinion

	Average	Contains sulfites	Short list	Long list
Base:	***1,503***	*509*	*495*	*500*
Red	**22%**	27%	15%	23%
White	**22%**	23%	21%	21%
Rosé	**20%**	24%	18%	18%
Average all styles	**22%**	**26%**	**18%**	**21%**

On average, the negative impact of ingredients labelling is similar across the three styles.

Intent to buy: % probably not buy / definitely not buy again

	Average	Contains sulfites	Short list	Long list
Base:	***1,503***	*509*	*495*	*500*
Red	**10%**	12%	5%	11%
White	**9%**	9%	10%	7%
Rosé	**7%**	12%	6%	3%
Average all styles	**9%**	**12%**	**7%**	**8%**

On average, the negative impact of a long list of ingredients is higher for a red wine, moderate for a white wine and low for a rosé wine.

Red / Blue : significantly higher / lower than 'Average all colours' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine :
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY : IMPACT OF WINE INGREDIENTS LABELLING ON A NEW WINE – QUESTIONNAIRE STRUCTURE

We asked respondents to imagine they are in a shop and that they spot a wine that seems to match the type of wine they like to drink. Each respondent was randomly assigned to 1 of the 3 possible scenarios of back labels:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"



"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

Each respondent was shown either a **white** wine (≈50% of respondents) or a **red** wine (≈50% of respondents) back label.

Q7: new wine – consideration to buy (1 to 5 scale)

Q8: new wine – price range perception (scale ranging from 'very low end' to 'very high-end')

Q9: new wine – perceptions / imagery (8 statements, using a scale)

Note: back labels are shown in the appendix.

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

RED WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

Findings suggest that the shift from 'contains sulfites' to the full list of ingredients yields a slightly higher likelihood of trialling a new wine (41% positive intent vs 36%; note: differences are not statistically significant).

They also suggest that consumers prefer a **short list** of ingredients (only 13% would reject it vs 18% for both other back labels).

Red wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this wine?
Base: all French wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈250)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***253***	*259*	*249*
I would consider / strongly consider buying it	**36%**	41%	41%
I may consider buying it	**40%**	41%	35%
I would probably not / definitely not consider buying it	**18%**	13%	18%
I don't know / not sure	**6%**	6%	6%
Total	**100%**	100%	100%

Net (% would buy - % would not consider buying)	**17%**	**28%**	**23%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

RED WINE BACK LABEL : IMPACT OF WINE INGREDIENTS LABELLING (2/3)

The format of wine ingredients list doesn't seem to impact the perceived price of unknown wine much. In other words, adding a short or a long list of ingredients (on top of the base case 'contains sulfites') doesn't impact perceived value.

Red wine back label: impact of ingredients labelling on price perceptions

Question: This wine is probably…
Base: all French wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈250)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***253***	*259*	*249*
Very high-end	**3%**	3%	3%
High end	**22%**	21%	20%
Average	**60%**	61%	61%
Low end	**6%**	7%	7%
Very low-end	**1%**	2%	2%
I don't know / not sure	**8%**	6%	7%
Total	100%	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

RED WINE BACK LABEL : IMPACT OF WINE INGREDIENTS LABELLING (3/3)

A wine with a long list of ingredients inspires less confidence and is more likely to be perceived as an ordinary wine.

Red wine back label: impact of ingredients labelling on wine imagery

Question: Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all French wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈250), NSP are excluded

% Appropriate / Very appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base:	***253***	*259*	*249*
It probably tastes good	**71%**	74%	65%
A wine that seems to be produced with care	**69%**	71%	60%
It inspires confidence	**63%**	72%	60%
It probably is of high quality	**59%**	62%	55%
A wine that is probably produced in an environmentally friendly way	**56%**	61%	51%
A wine I would probably be proud to serve to friends	**56%**	59%	49%
A wine I would probably enjoy for everyday drinking	**51%**	59%	52%
It probably is an ordinary wine	**39%**	43%	48%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

The shift from 'contains sulfites' to a short list of ingredients significantly increases the willingness to trial a new wine (49% positive intent vs 39%). Findings suggest that this impact is similar with a long list of ingredients.

White wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this wine?
Base: all French wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈250)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***255***	*235*	*251*
I would consider / strongly consider buying it	**39%**	49%	46%
I may consider buying it	**36%**	37%	35%
I would probably not / definitely not consider buying it	**19%**	11%	16%
I don't know / not sure	**5%**	3%	3%
Total	**100%**	100%	100%
Net impact (% would buy - % would not consider buying)	**20%**	**39%**	**30%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (2/3)

The format of the wine ingredients list doesn't impact the perceived price of a wine much. However, a short list of ingredients slightly increases its perceived value.

White wine back label: impact of ingredients labelling on price perceptions

Question: This wine is probably…
Base: all French wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈250)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***255***	*235*	*251*
Very high-end	**1%**	4%	1%
High end	**18%**	23%	22%
Average	**60%**	61%	58%
Low end	**7%**	5%	9%
Very low-end	**2%**	1%	1%
I don't know / not sure	**12%**	7%	8%
Total	**100%**	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (3/3)

Consumers perceive few differences between the three lists. However, findings suggest that a short list of ingredients inspires more confidence than both other back labels (68% vs 62% ; note : differences are not statistically significant).

White wine back label: impact of ingredients labelling on wine imagery

Question: Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all French wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈250), NSP are excluded

% Appropriate / Very appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base:	***255***	*235*	*251*
It probably tastes good	**70%**	73%	74%
A wine that seems to be produced with care	**64%**	69%	69%
It inspires confidence	**62%**	68%	62%
A wine that is probably produced in an environmentally friendly way	**59%**	58%	57%
It probably is of high quality	**56%**	64%	60%
A wine I would probably enjoy for everyday drinking	**54%**	56%	58%
A wine I would probably be proud to serve to friends	**52%**	59%	56%
It probably is an ordinary wine	**45%**	44%	46%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY: IMPACT OF WINE INGREDIENTS LABELLING ON A NEW SPARKLING WINE – QUESTIONNAIRE STRUCTURE

Respondents were asked to imagine they are in a shop and that they spot a wine that seems to match the type of sparkling wine they like to drink. Each respondent is (randomly) shown one of the 3 possible **sparkling wine** back labels:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"



"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

- Q10: new wine – consideration to buy (1 to 5 scale)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

SPARKLING WINE: IMPACT OF INGREDIENTS LABELLING

Consumers express strong preference for the back labels showing either a long or a short list of ingredients (34 / 33% consider to buy vs 27% for the base case 'contains sulfites'.

Overall, the short list yields higher net performances (34% of positive intent and only 26% of negative intent).

Sparkling wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this sparkling wine?
Base: all French wine drinkers (randomly) assigned to one of the 3 possible sparkling wine back labels (n≈500)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	*509*	*495*	*500*
I would consider / strongly consider buying it	27%	34%	33%
I may consider buying it	37%	36%	31%
I would probably not / definitely not consider buying it	30%	26%	31%
I don't know / not sure	6%	4%	6%
Total	100%	100%	100%
Net impact (% consider - % do not consider)	*-3%*	*8%*	*3%*

Rouge / Bleu : significativement supérieur / inférieur à 'Contient des sulfites' (indice de confiance : 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

SPECIFIC WINE INGREDIENTS ACCEPTANCE: METHODOLOGY

We asked respondents to imagine they are in a shop and that they spot a wine that seems to match the type of wine they like to drink. Each respondent is (randomly) assigned to one of the two following scenarios:

Scenario 1 (≈50% of respondents)

Respondents are exposed to a list of ingredients, with no information.

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)
- Tartaric acid
- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate

Scenario 2 (≈50% of respondents)

Respondents are exposed to the same list but with short explanations.

Ingredients used to better preserve the wine:

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)

Ingredients used to better maintain the quality of the wine (stabilise it and / or regulate its level of acidity):

- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate
- Tartaric acid

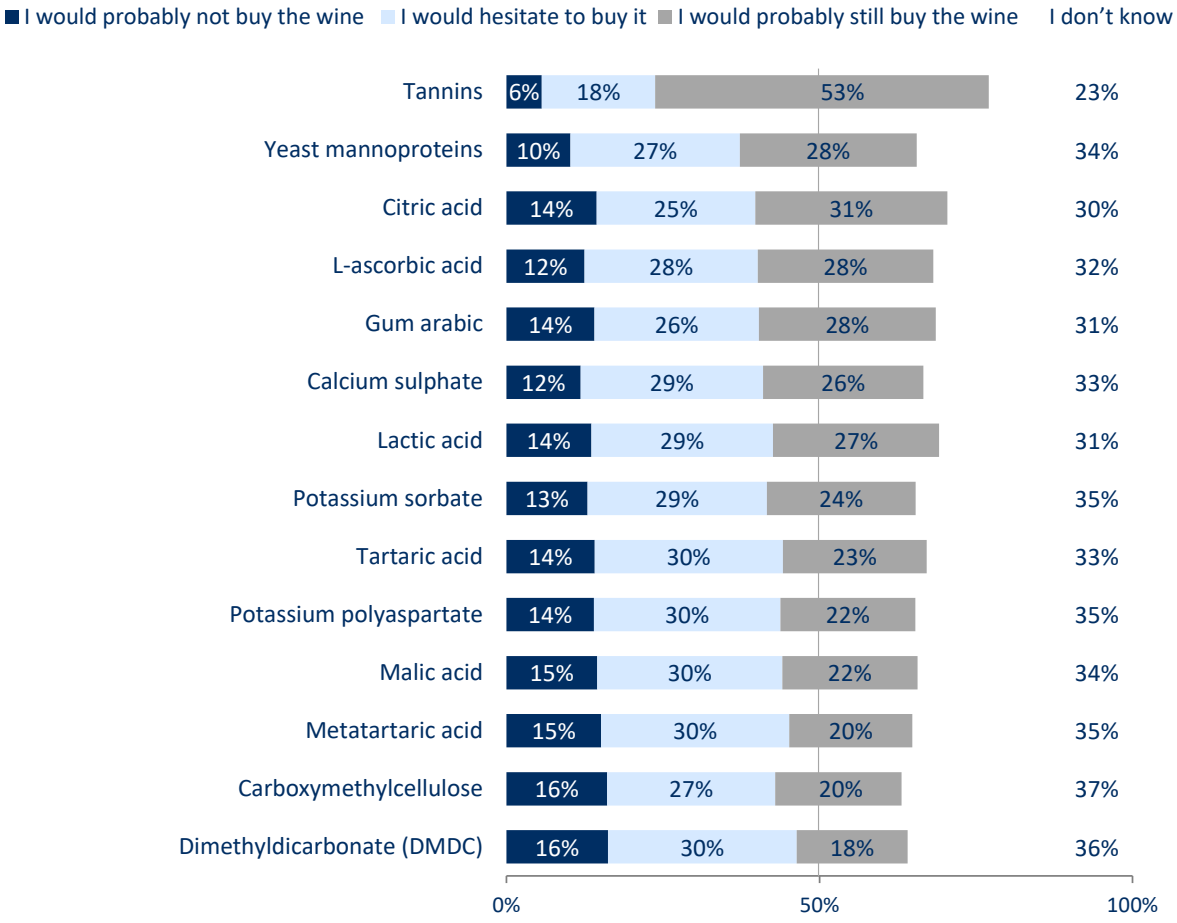
Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

ACCEPTANCE OF SPECIFIC INGREDIENTS: WITHOUT INFORMATION

Tannins are by far the most accepted ingredient (53% would buy the wine vs 26% on average). Most other ingredients tend to mostly yield uncertain views, more so than outright rejection.

Acceptance of specific wine ingredients: without information

Question: For each of these ingredients, what would your reaction be? Base : all French wine drinkers (randomly) assigned to the scenario ' No information' (n=756)



	Average scores
Base:	*756*
% 'Still buy'	26%
% 'Hesitate'	28%
% 'Not buy'	13%
% 'Don't know'	33%

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

ACCEPTANCE OF SPECIFIC INGREDIENTS: IMPACT OF EDUCATION

For the vast majority of ingredients, explaining why they are used doesn't increase acceptance, with one exception: DMDC. In this instance, the acceptance level increases by +4 pts (from 18% to 22% of acceptance).

Acceptance of specific wine ingredients: impact of education

Question: For each of these ingredients, what would your reaction be?
Base: all French wine drinkers (randomly) assigned to the scenario ' Short explanation' (n=747)

	% I would probably not buy the wine	% I would hesitate to buy it	% I would probably still buy the wine	% I don't know / not sure
Tannins	ns	ns	ns	ns
Yeast mannoproteins	ns	ns	ns	ns
Citric acid	ns	ns	ns	ns
L-ascorbic acid	ns	ns	ns	ns
Gum arabic	ns	ns	ns	ns
Calcium sulphate	ns	ns	ns	ns
Lactic acid	ns	ns	ns	ns
Potassium sorbate	ns	ns	ns	ns
Tartaric acid	ns	ns	ns	ns
Potassium polyaspartate	ns	ns	ns	ns
Malic acid	ns	ns	ns	ns
Metatartaric acid	ns	ns	ns	ns
Carboxymethylcellulose	ns	ns	ns	ns
Dimethyldicarbonate (DMDC)	ns	ns	+4 pts	-6 pts

Without information → With information

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)
- Tartaric acid
- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate

Ingredients used to better preserve the wine:

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)

Ingredients used to better maintain the quality of the wine (stabilise it and/or regulate its level of acidity):

- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate
- Tartaric acid

ns = not significant

Red / Blue : significantly higher / lower than 'Without information' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

CONCLUSIONS: KEY TAKEAWAYS

- Most consumers don't reject the idea of the use of additives in the winemaking process.

  Most either recognise or are neutral regarding the presence of additives in wines. Similarly, they will mostly agree or be neutral regarding their usefulness in the winemaking process.

- However, 54% believe that good quality wines don't need additives and 45% express concerns regarding their impact on health. Providing reassurance on both counts are key points to consider.

- The disclosure of ingredients of a known and trusted wine yields more uncertainty than rejection.

  'Only' 9% of consumers state they would stop buying the wine and **32% would hesitate**. The disclosure of wine ingredients yields a decrease in imagery perceptions though ratings remain quite high. A short list of ingredients is preferable to a long one.

- A **short** list of ingredients improves perceptions of an unknown red wine

  Shifting from 'contains sulfites' to a **short list** of ingredients raises confidence level with the brand and findings suggest that consideration to buy the wine may increase slightly. However, a long list of ingredients tends to harm wine imagery: it makes it look more ordinary, not produced with as much care.

- A **short** list of ingredients has a positive impact on the willingness to trial an unknown white wine

  Shifting from 'contains sulfites' to a **short list** of ingredients significantly improves the willingness to trial and trust levels with the brand. A long list doesn't seem to change consumers' perceptions much.

- Regarding specific ingredients, **tannins** are well accepted. For other ingredients, the most common reaction is uncertainty (33% 'don't know / unsure'), more so than outright rejection. Education (i.e. explaining why ingredients are used) doesn't seem to increase level of acceptance.

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

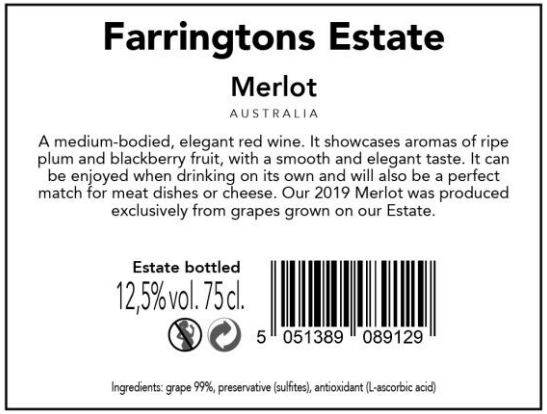
CONTENTS

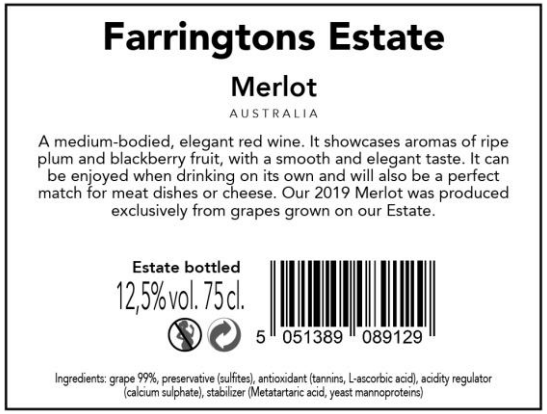
1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices
   - New wine: back labels shown to respondents
   - New wine: average findings (white + white wine merged)

APPENDIX : METHODOLOGY – TESTED BACK LABELS (STILL WINE)

Red wine back label:







White wine back label:







Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

APPENDIX : METHODOLOGY – TESTED BACK LABELS (SPARKLING WINE)

Sparkling wine back label:







Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices
   - Trialling a new wine: back labels shown to respondents
   - Trialling a new wine: average findings (white + white wine merged)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

Still (white + red) wine back label: impact of ingredients labelling on consideration to buy

Question : To what extent would you consider buying this wine?
Base: all French wine drinkers (randomly) assigned to one of the three back labels (n≈500)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*509*	*495*	*500*
I would consider / strongly consider buying it	37%	45%	44%
I may consider buying it	38%	39%	34%
I would probably not / definitely not consider buying it	19%	12%	17%
I don't know / not sure	5%	4%	4%
Total	100%	100%	100%

Net impact (% would buy - % would not consider buying)	**19%**	**33%**	**27%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (2/3)

Still (white + red) wine back label : impact of ingredients labelling on price perceptions

Question : This wine is probably…
Base: all French wine drinkers (randomly) assigned to one of the three back labels (n≈500)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*509*	*495*	*500*
Very high-end	2%	3%	2%
High end	20%	22%	21%
Average	60%	61%	60%
Low end	6%	6%	8%
Very low-end	2%	1%	1%
I don't know / not sure	10%	7%	7%
Total	100%	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (1/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% appropriate / very appropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all French wine drinkers (randomly) assigned to one of the three back labels (n≈500)

% Appropriate / Very appropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*509*	*495*	*500*
It probably tastes good	70%	74%	69%
A wine that seems to be produced with care	67%	70%	65%
It inspires confidence	63%	70%	61%
A wine that is probably produced in an environmentally friendly way	58%	60%	54%
It probably is of high quality	58%	63%	58%
A wine I would probably be proud to serve to friends	54%	59%	53%
A wine I would probably enjoy for everyday drinking	52%	58%	55%
It probably is an ordinary wine	42%	43%	47%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (2/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% neither appropriate not inappropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all French wine drinkers (randomly) assigned to one of the three back labels (n≈500)

% Neither appropriate nor inappropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*509*	*495*	*500*
It probably tastes good	19%	18%	20%
A wine that seems to be produced with care	22%	20%	23%
It inspires confidence	25%	22%	24%
A wine that is probably produced in an environmentally friendly way	25%	26%	27%
It probably is of high quality	28%	25%	27%
A wine I would probably be proud to serve to friends	28%	27%	27%
A wine I would probably enjoy for everyday drinking	29%	24%	24%
It probably is an ordinary wine	31%	32%	30%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (3/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% not / not at all appropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base : all wine drinkers (randomly) assigned to one of the three scenarios of back labels (n≈500)

% Not appropriate / Not at all appropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*509*	*495*	*500*
It probably tastes good	3%	2%	4%
A wine that seems to be produced with care	6%	2%	5%
It inspires confidence	6%	4%	9%
A wine that is probably produced in an environmentally friendly way	9%	5%	10%
It probably is of high quality	7%	4%	8%
A wine I would probably be proud to serve to friends	12%	7%	13%
A wine I would probably enjoy for everyday drinking	13%	12%	16%
It probably is an ordinary wine	19%	17%	15%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (4/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% I don't know / not sure)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all French wine drinkers (randomly) assigned to one of the three back labels (n≈500)

% I don't know / not sure	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*509*	*495*	*500*
It probably tastes good	7%	7%	7%
A wine that seems to be produced with care	6%	7%	7%
It inspires confidence	7%	5%	6%
A wine that is probably produced in an environmentally friendly way	8%	10%	9%
It probably is of high quality	8%	8%	7%
A wine I would probably be proud to serve to friends	6%	8%	7%
A wine I would probably enjoy for everyday drinking	6%	7%	6%
It probably is an ordinary wine	8%	7%	8%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (5/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all French wine drinkers (randomly) assigned to one of the three back labels (n≈500)

Net impact (positive - negative)	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*509*	*495*	*500*
It probably tastes good	67%	71%	65%
A wine that seems to be produced with care	61%	68%	59%
It inspires confidence	57%	66%	51%
A wine that is probably produced in an environmentally friendly way	48%	54%	44%
It probably is of high quality	50%	58%	50%
A wine I would probably be proud to serve to friends	41%	52%	40%
A wine I would probably enjoy for everyday drinking	39%	46%	39%
It probably is an ordinary wine	23%	26%	32%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: France (n=1503 wine drinkers)

Connecting wine businesses with knowledge and insights globally

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WINE INTELLIGENCE

Wine consumers' perceptions and reactions towards labelling ingredients on wine bottles

Report: German market, April 2021

OEnoppia

INTRODUCTION

Study findings are reported through 11 reports:

1. USA
2. Australia
3. Japan
4. France
5. Germany — This report
6. Italy
7. Russia
8. Spain
9. Sweden
10. UK
11. Multi-market management summary

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

RESEARCH OBJECTIVES

The overall objective of this study is to assess consumers' perceptions, attitudes and opinions of wine ingredients labelling

Four specific objectives have been assigned to this study:

1. Assess consumers' perceptions and knowledge of winemaking practices.

2. Asses the impact of labelling ingredients on purchase consideration and imagery of a tried and liked wine (impact on brand loyalty) and on an unknown wine (impact on new consumer acquisition).

3. Assess the impact of two levels of information: a short vs long list of ingredients.

4. Assess the level of consumer acceptance for specific ingredients.

METHODOLOGY: DATA COLLECTION

Consumer survey: data gathered via the Vinitrac® Germany omnibus survey platform:

- **Scope:** all wine drinkers living in Germany who drink wine at least once a month.
- **Sampling:** quota-based sample (age, gender and region of residence).
- **Data collection mode:** online.
- **Dates of data collection:** from 5th February to 18th February 2021.
- **Sample size** (after cleaning and weighting procedures): 1,000 respondents.
- Sample profile is shown in the table:

Gender	Male	44%
	Female	56%
	Total	100%
Age	18-24	5%
	25-34	9%
	35-44	12%
	45-54	20%
	55 and above	53%
	Total	100%
Region of residence	Baden-Wurttemberg	14%
	Bavaria	15%
	Berlin	3%
	Brandenburg / Mecklenburg-Western Pomerania	5%
	Lower Saxony / Bremen	10%
	Schleswig-Holstein / Hamburg	5%
	Hesse	9%
	North Rhine-Westphalia	22%
	Rhineland-Palatinate / Saarland	6%
	Saxony / Saxony-Anhalt / Thingen	10%
	Total	100%

STUDY CONTEXT: MARKET SIZE

The survey is representative of the 27.5 million adults living in Germany who drink wine at least once a month.

	Adult population (millions)	% drink still wine*	Survey is representative of … **million wine drinkers**
USA	241	32%	77
Australia	18.2	50%	9.2
Japan	105.1	22%	23.1
France	51	75%	38
Germany	66.2	42%	27.5
Italy	49.7	62%	31
Russia	16.3	46%	7.5
Spain	38	50%	18.9
Sweden	7.9	55%	4.3
UK	52.4	49%	25.9
Total	**646**	**41%**	**262**

→ This report

*% drink red, white or rosé wine at least once a month, except in two markets:

- France: all wine drinkers who live in France (exc. Corsica and overseas territories)
- Russia: all imported wine drinkers (at least twice per year), aged between 18 and 64 years old, living in Moscow and St Petersburg

[1] Source : national statistics

[2] Source : Wine Intelligence, calibration surveys

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

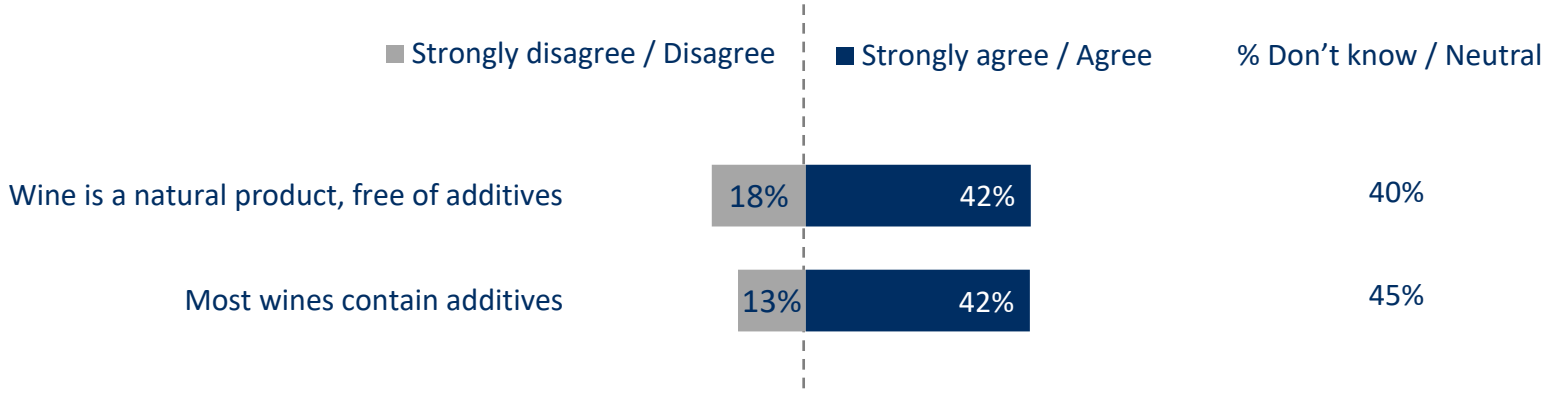
WINEMAKING PERCEPTIONS AND KNOWLEDGE (1/3)

About 40% of consumers are uncertain or neutral regarding the presence of additives in wine. A similar share of the population (42%) believe that wine is either free of additives or contain some.

Winemaking process perceptions and knowledge (1/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all German monthly wine drinkers (n=1,000)

Presence of additives in wine



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

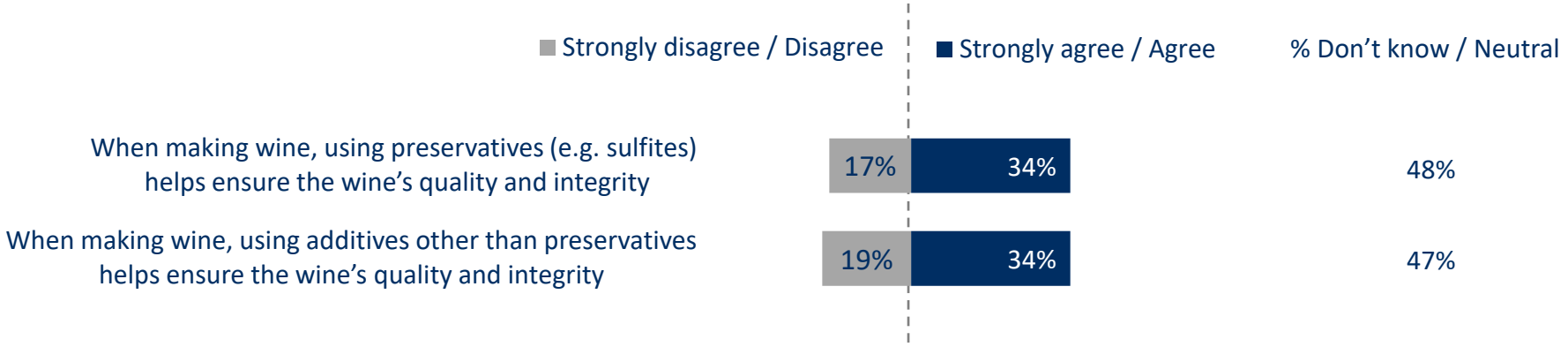
WINEMAKING PERCEPTIONS AND KNOWLEDGE (2/3)

Regarding the usefulness of using additives in wine, almost half of consumers express neutral or uncertain views whereas 1 in 3 believe they are useful. These findings indicate that most wine consumers are not rejecting the idea that additives may be useful in the winemaking process.

Winemaking process perceptions and knowledge (2/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all German monthly wine drinkers (n=1,000)

Usefulness of additives in winemaking process



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

WINEMAKING PERCEPTIONS AND KNOWLEDGE (3/3)

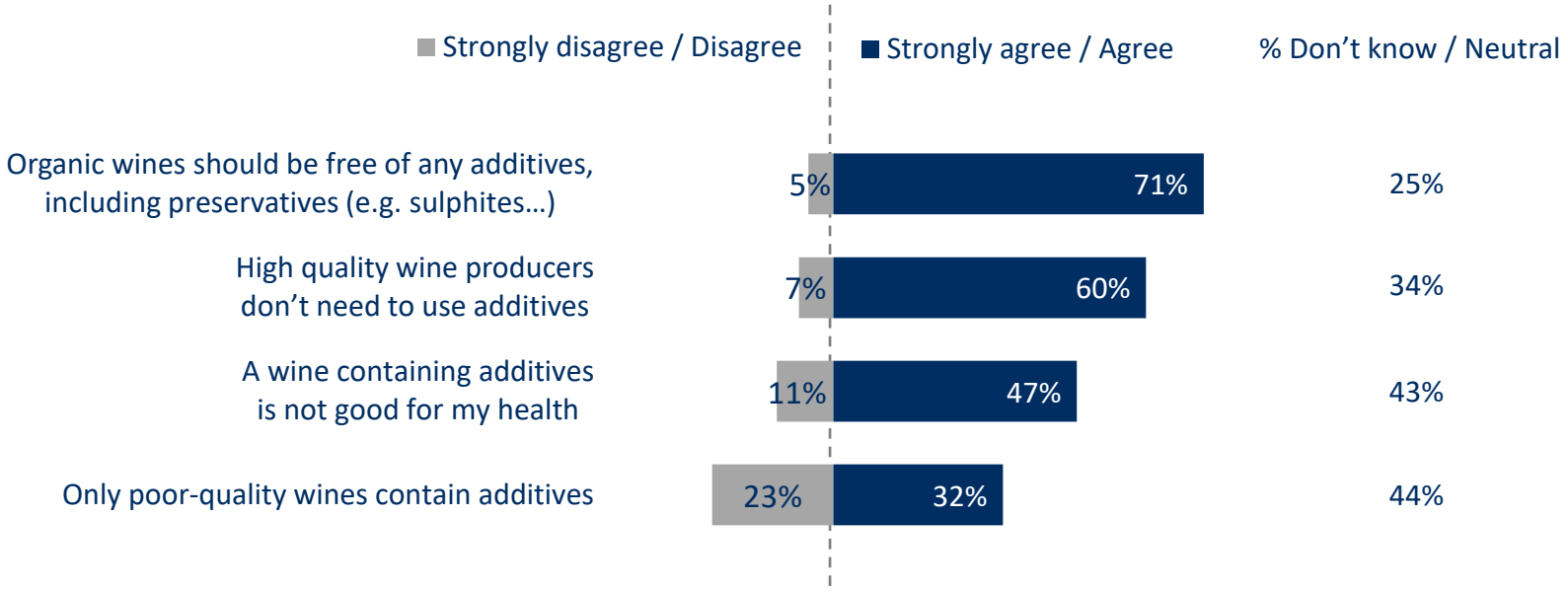
Excluding organic wines, 60% of consumers believe that high quality wines don't need to use additives. However, only 32% believe that only poor quality wines contain additives. This suggests that most consumers accept the idea of the presence of additives in low to mid quality wines.

It's noteworthy that almost half (47%) have concerns about the impact of additives on their health.

Winemaking process perceptions and knowledge (3/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all German monthly wine drinkers (n=1,000)

Wine additives: quality and health



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY: IMPACT OF WINE INGREDIENTS LABELLING ON A TRIED AND LIKED WINE – QUESTIONNAIRE STRUCTURE

All respondents

Respondents were asked to think about a wine they regularly buy and love drinking.

- Q2: favourite wine style (red wine / white wine / rosé wine)
- Q3: favourite wine perceptions / imagery (10 statements, using a 1-5 scale)

Respondents are informed that the back label exhibits the wine's ingredients.
Each respondent has been randomly assigned to one of the three following scenarios:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients:
"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients:
"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

- Q4: changes in opinion (1 to 5 scale)
- Q5: changes in intent to buy (1 to 5 scale)
- Q6: changes in imagery (10 statements, 1 to 5 scales)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON OVERALL OPINION

On average, the disclosure of ingredients will drive down the opinion amongst 15% of consumers whilst 37% are uncertain about how to interpret it. This negative impact is lower for a short list of ingredients and highest for a long list.

Known and liked wine: impact of wine ingredients labelling on overall opinion

Question: Now knowing the ingredients it contains, does it change your opinion about this wine?
Base: all German monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈330 per scenario)

	Average across the three lists	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***1,000***	*324*	*332*	*343*
No, it doesn't change my opinion at all	**20%**	17%	22%	20%
No, it doesn't change my opinion much	**28%**	28%	30%	25%
It may change my opinion, I am not sure	**37%**	39%	37%	36%
Yes, it gives me a lower opinion of it	**11%**	10%	8%	14%
Yes, it gives me a rather poor opinion of it	**4%**	6%	2%	5%
Total	**100%**	100%	100%	100%

% lower / rather poor opinion	**15%**	**15%**	**11%**	**20%**

Red / Blue : significantly higher / lower than 'Average across the 3 lists' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON INTENT TO BUY

On average, the disclosure of ingredients of a favourite wine would yield 11% of consumers to be unwilling to buy it again and 26% would hesitate or be unsure.

This negative impact (i.e. rate of rejection or hesitation) is similar across the three labelling formats.

Known and liked wine: impact of wine ingredients labelling on intent to buy

Question: And how likely would you be to repurchase this wine in the future?
Base: all German monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈330 per scenario)

	Average across the three lists	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***1,000***	*324*	*332*	*343*
I would definitely buy it again	**34%**	33%	36%	34%
I would probably buy it again	**29%**	28%	29%	29%
I would hesitate to buy it again	**20%**	21%	19%	20%
I would probably not buy it again	**8%**	8%	7%	8%
I would definitely not buy it again	**3%**	3%	3%	4%
I don't know / not sure	**6%**	7%	7%	4%
Total	**100%**	100%	100%	100%

% probably not buy / definitely not buy again	**11%**	**11%**	**10%**	**13%**

Red / Blue : significantly higher / lower than 'Average across the 3 lists' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON IMAGERY

Disclosing the list of ingredients on the back label drives imagery perceptions down. The negative impact is highest for short and long lists and moderate for 'contains sulfites' only'.

Known and liked wine: impact of wine ingredients labelling on imagery

Question: Now knowing the ingredients it contains, please indicate the extent to which you feel that each of the following statements are appropriate to describe your FAVOURITE wine on a 1 to 5 scale where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all German monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈330 per scenario)

% Appropriate / Very appropriate	Known and liked wine	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	*1,000*	*324*	*332*	*343*
A taste I like	93%	91%	85%	81%
Very good quality	87%	80%	73%	74%
A wine I am never disappointed with	86%	81%	75%	74%
Good value for money	86%	82%	79%	78%
A wine I enjoy for everyday drinking	78%	78%	70%	70%
A wine produced with care	76%	72%	69%	66%
Made by a producer that I trust	74%	73%	64%	66%
A wine that inspires confidence	73%	72%	62%	61%
A wine that I am proud to serve to my friends/family	67%	66%	59%	58%
A wine produced in an environmentally friendly way	56%	55%	51%	51%

Initial positive views shifting towards:

With a short or a long list of ingredients, views tend to mostly shift to neutral or unsure positions, less so to negatives ones.

For 'contain sulfites', they tend to shift almost evenly towards both neutral and negative grounds.

Red / Blue : significantly higher / lower than 'Known and liked wine' (confidence interval: 95%)

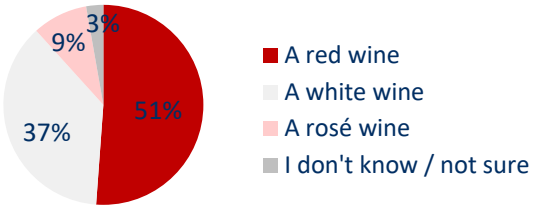
Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

KNOWN AND LIKED WINE: FINDINGS SUMMARY BY WINE TYPE PREFERENCE

The negative impact of ingredients labelling is similar for both white and red wines (note: for rosé wines the sample size is too small to be interpreted).

Known and like wine: by wine type

Question: Please think about your FAVOURITE wine brand or producer, i.e. a wine that you regularly buy and that you love drinking. Is this wine:
Base: all German monthly wine drinkers (n=1,000)



Overall opinion: % lower / rather poor opinion

	Average	Contains sulfites	Short list	Long list
Base:	***1,000***	*324*	*332*	*343*
Red	**15%**	15%	12%	18%
White	**17%**	16%	10%	25%
Rosé	**11%**	13%	7%	14%
Average all styles	**15%**	**15%**	**11%**	**20%**

Intent to buy: % probably not buy / definitely not buy again

	Average	Contains sulfites	Short list	Long list
Base:	***1,000***	*324*	*332*	*343*
Red	**10%**	9%	9%	11%
White	**12%**	11%	12%	13%
Rosé	**13%**	16%	7%	17%
Average all styles	**11%**	**11%**	**10%**	**13%**

On average, the negative impact of ingredients labelling seems to be similar across the three colours.

Red / Blue : significantly higher / lower than 'Average all colours' (confidence interval: 95%) - Grey: small sample size (n<50)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine :
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY : IMPACT OF WINE INGREDIENTS LABELLING ON A NEW WINE – QUESTIONNAIRE STRUCTURE

We asked respondents to imagine they are in a shop and that they spot a wine that seems to match the type of wine they like to drink. Each respondent was randomly assigned to 1 of the 3 possible scenarios of back labels:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"



"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

Each respondent was shown either a **white** wine (≈50% of respondents) or a **red** wine (≈50% of respondents) back label.

Q7: new wine – consideration to buy (1 to 5 scale)

Q8: new wine – price range perception (scale ranging from 'very low end' to 'very high-end')

Q9: new wine – perceptions / imagery (8 statements, using a scale)

Note: back labels are shown in the appendix.

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

RED WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

On average, ingredients labelling yields 15% of consumers to reject the wine and 35% to hesitate buying it.

This negative impact is similar across the three labelling formats.

Red wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this wine?
Base: all German monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***159***	*167*	*176*
I would consider / strongly consider buying it	**50%**	52%	51%
I may consider buying it	**31%**	27%	27%
I would probably not / definitely not consider buying it	**15%**	17%	17%
I don't know / not sure	**4%**	4%	6%
Total	**100%**	100%	100%
Net (% would buy - % would not consider buying)	**35%**	**35%**	**34%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

RED WINE BACK LABEL : IMPACT OF WINE INGREDIENTS LABELLING (2/3)

A long list of ingredients tends to significantly increase the percentage of consumers who will perceive the wine as being low end.

Red wine back label: impact of ingredients labelling on price perceptions

Question: This wine is probably…
Base: all German monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***159***	*167*	*176*
Very high-end	**12%**	8%	8%
High end	**40%**	43%	32%
Average	**38%**	34%	43%
Low end	**1%**	2%	8%
Very low-end	**2%**	2%	0%
I don't know / not sure	**7%**	11%	9%
Total	**100%**	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

RED WINE BACK LABEL : IMPACT OF WINE INGREDIENTS LABELLING (3/3)

A long list of ingredients drives imagery down. Data suggests similar findings for a short list, although on a smaller scale (indicative findings: short list differences vs 'contains sulfites' are not statistically significant).

Red wine back label: impact of ingredients labelling on wine imagery

Question: Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all German monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈160)

% Appropriate / Very appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base:	***159***	*167*	*176*
A wine that seems to be produced with care	**66%**	61%	55%
It probably tastes good	**65%**	63%	60%
A wine I would probably enjoy for everyday drinking	**62%**	54%	48%
It probably is of high quality	**59%**	54%	45%
It inspires confidence	**54%**	55%	41%
A wine I would probably be proud to serve to friends	**50%**	40%	40%
A wine that is probably produced in an environmentally friendly way	**46%**	42%	40%
It probably is an ordinary wine	**36%**	35%	36%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

The shift from 'contains sulfites' to either a short or a long list of ingredients doesn't seem to have much impact on consideration to buy.

White wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this wine?
Base: all German monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***165***	*165*	*167*
I would consider / strongly consider buying it	**46%**	42%	47%
I may consider buying it	**33%**	33%	35%
I would probably not / definitely not consider buying it	**18%**	18%	14%
I don't know / not sure	**2%**	8%	4%
Total	**100%**	100%	100%

Net impact (% would buy - % would not consider buying)	**28%**	**24%**	**33%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (2/3)

The shift from 'contains sulfites' to a short or a long list of ingredients doesn't significantly impact perceived value.

White wine back label: impact of ingredients labelling on price perceptions

Question: This wine is probably…
Base: all German monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***165***	*165*	*167*
Very high-end	**7%**	7%	7%
High end	**34%**	40%	42%
Average	**42%**	38%	39%
Low end	**5%**	4%	3%
Very low-end	**1%**	0%	1%
I don't know / not sure	**11%**	11%	8%
Total	**100%**	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (3/3)

Consumers perceive few differences between the three lists. However, findings suggest that a short list of ingredients has a significant negative impact on taste perceptions.

White wine back label: impact of ingredients labelling on wine imagery

Question: Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all German monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈160)

% Appropriate / Very appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base:	***165***	*165*	*167*
It probably tastes good	**69%**	57%	67%
A wine I would probably enjoy for everyday drinking	**63%**	56%	61%
A wine that seems to be produced with care	**60%**	58%	64%
It probably is of high quality	**58%**	56%	59%
It inspires confidence	**50%**	51%	51%
A wine that is probably produced in an environmentally friendly way	**45%**	38%	44%
A wine I would probably be proud to serve to friends	**38%**	40%	45%
It probably is an ordinary wine	**32%**	32%	40%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY: IMPACT OF WINE INGREDIENTS LABELLING ON A NEW SPARKLING WINE – QUESTIONNAIRE STRUCTURE

Respondents were asked to imagine they are in a shop and that they spot a wine that seems to match the type of sparkling wine they like to drink. Each respondent is (randomly) shown one of the 3 possible **sparkling wine** back labels:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"



"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

- Q10: new wine – consideration to buy (1 to 5 scale)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

SPARKLING WINE: IMPACT OF INGREDIENTS LABELLING

The full disclosure of ingredients doesn't significantly impact consideration to buy.

Sparkling wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this sparkling wine?
Base: all German monthly wine drinkers (randomly) assigned to one of the 3 possible sparkling wine back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	*324*	*332*	*343*
I would consider / strongly consider buying it	37%	35%	37%
I may consider buying it	34%	33%	33%
I would probably not / definitely not consider buying it	25%	26%	24%
I don't know / not sure	4%	6%	7%
Total	100%	100%	100%
Net impact (% would consider - % would not consider)	**12%**	**9%**	**13%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

SPECIFIC WINE INGREDIENTS ACCEPTANCE: METHODOLOGY

We asked respondents to imagine they are in a shop and that they spot a wine that seems to match the type of wine they like to drink. Each respondent is (randomly) assigned to one of the two following scenarios:

Scenario 1 (≈50% of respondents)

Respondents are exposed to a list of ingredients with no information.

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)
- Tartaric acid
- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate

Scenario 2 (≈50% of respondents)

Respondents are exposed to the same list but with short explanations.

Ingredients used to better preserve the wine:

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)

Ingredients used to better maintain the quality of the wine (stabilise it and / or regulate its level of acidity):

- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate
- Tartaric acid

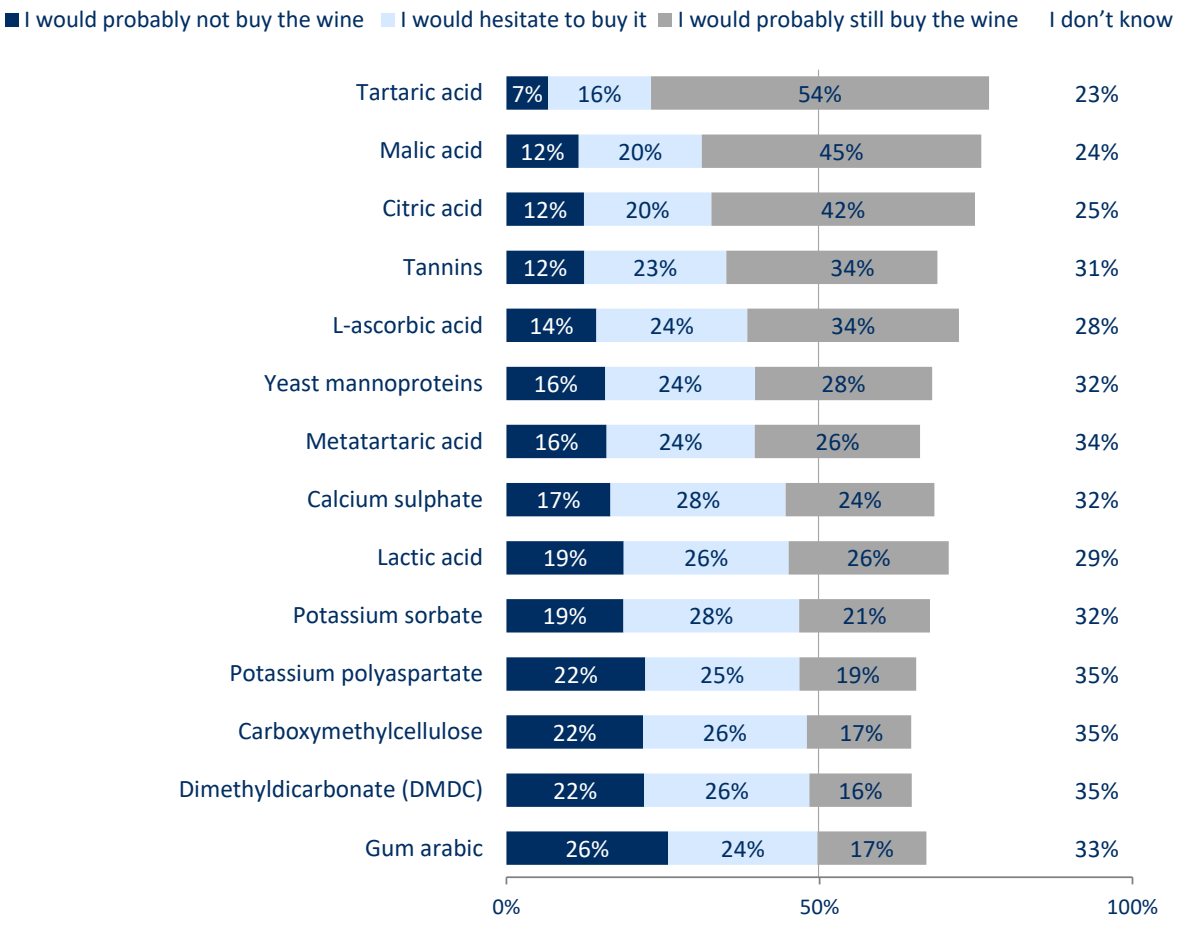
Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

ACCEPTANCE OF SPECIFIC INGREDIENTS: WITHOUT INFORMATION

Acids (tartaric, malic and citric) are the most accepted ingredients. On average, ingredients tend to mostly yield uncertain views or acceptance, more so than outright rejection.

Acceptance of specific wine ingredients: without information

Question: For each of these ingredients, what would your reaction be? Base : all German monthly wine drinkers (randomly) assigned to the scenario ' No information' (n=497)



	Average scores
Base:	*497*
% 'Still buy'	29%
% 'Hesitate'	24%
% 'Not buy'	17%
% 'Don't know'	31%

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

ACCEPTANCE OF SPECIFIC INGREDIENTS: IMPACT OF EDUCATION

For the vast majority of ingredients, explaining why they are used doesn't increase acceptance, with two exceptions: DMDC and Potassium sorbate. In these instances, the acceptance level increases by +6 pts (from 21% and 16% to 26% and 22%).

Acceptance of specific wine ingredients: impact of education

Question: For each of these ingredients, what would your reaction be?
Base: all German monthly wine drinkers (randomly) assigned to the scenario ' Short explanation' (n=503)

	% I would probably not buy the wine	% I would hesitate to buy it	% I would probably still buy the wine	% I don't know / not sure
Tartaric acid	ns	ns	ns	ns
Malic acid	ns	ns	ns	ns
Citric acid	ns	ns	ns	ns
Tannins	ns	ns	ns	ns
L-ascorbic acid	ns	ns	ns	ns
Yeast mannoproteins	ns	ns	ns	ns
Metatartaric acid	ns	ns	ns	ns
Calcium sulphate	ns	ns	ns	ns
Lactic acid	ns	ns	ns	ns
Potassium sorbate	-5 pts	ns	+6 pts	ns
Potassium polyaspartate	ns	ns	ns	ns
Carboxymethylcellulose	ns	ns	ns	ns
Dimethyldicarbonate (DMDC)	-6 pts	ns	+6 pts	ns
Gum arabic	ns	ns	ns	ns

Without information → With information

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)
- Tartaric acid
- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate

Ingredients used to better preserve the wine:

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)

Ingredients used to better maintain the quality of the wine (stabilise it and/or regulate its level of acidity):

- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate
- Tartaric acid

ns = not significant

Red / Blue : significantly higher / lower than 'Without information' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

CONCLUSIONS: KEY TAKEAWAYS

- Most consumers don't reject the idea of the use of additives in the winemaking process.

  Most either recognise or are neutral regarding the presence of additives in wines. Similarly, they will mostly agree or be neutral regarding their usefulness in the winemaking process.

- However, 60% believe that good quality wines don't need additives and 47% express concerns regarding their impact on health. Providing reassurance on both counts are key points to consider.

- The disclosure of ingredients of a known and trusted wine yields more uncertainty than rejection.

  11% of consumers state they would stop buying the wine and **26% would hesitate**. The disclosure of wine ingredients yields a decrease in imagery perceptions, specially when in long or short lists. 'Contains sulfites' only is preferable to the full list.

- The disclosure of all ingredients doesn't have much impact on consideration to buy an unknown red wine.

  The same is true for shifting from 'contains sulfites' to a short or a long list of ingredients. However, a long list of ingredients drives down overall perceptions (imagery) of the wine.

- The disclosure of all ingredients doesn't have much impact on consideration to buy an unknown white wine

- Regarding specific ingredients, **several acids** (tartaric, malic and citric) are the most accepted. For most ingredients, the most common reactions are uncertainty (31%) or acceptance (29%), more so than outright rejection (17%). Education (i.e. explaining why ingredients are used) doesn't seem to increase level of acceptance (with two exceptions: DMDC and Potassium sorbate).

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices
   - New wine: back labels shown to respondents
   - New wine: average findings (white + white wine merged)

APPENDIX : METHODOLOGY – TESTED BACK LABELS (STILL WINE)

Red wine back label:







White wine back label:







Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

APPENDIX : METHODOLOGY – TESTED BACK LABELS (SPARKLING WINE)

Sparkling wine back label:







Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices
   - Trialling a new wine: back labels shown to respondents
   - Trialling a new wine: average findings (white + white wine merged)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/2)

Still (white + red) wine back label: impact of ingredients labelling on consideration to buy

Question : To what extent would you consider buying this wine?
Base: all German monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*324*	*332*	*343*
I would consider / strongly consider buying it	48%	47%	49%
I may consider buying it	32%	30%	31%
I would probably not / definitely not consider buying it	17%	17%	15%
I don't know / not sure	3%	6%	5%
Total	100%	100%	100%

Net impact (% would buy - % would not consider buying)	**31%**	**30%**	**33%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (2/2)

Still (white + red) wine back label : impact of ingredients labelling on price perceptions

Question : This wine is probably…
Base: all German monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*324*	*332*	*343*
Very high-end	9%	8%	7%
High end	37%	41%	37%
Average	40%	36%	41%
Low end	3%	3%	6%
Very low-end	1%	1%	0,3%
I don't know / not sure	9%	11%	9%
Total	100%	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (1/4)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% appropriate / very appropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all German monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% Appropriate / Very appropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*324*	*332*	*343*
It probably tastes good	67%	61%	64%
A wine that seems to be produced with care	63%	59%	59%
A wine I would probably enjoy for everyday drinking	61%	55%	54%
It probably is of high quality	58%	55%	52%
It inspires confidence	52%	53%	46%
A wine that is probably produced in an environmentally friendly way	45%	41%	42%
A wine I would probably be proud to serve to friends	44%	40%	42%
It probably is an ordinary wine	33%	34%	38%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (2/4)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% neither appropriate not inappropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all German monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% Neither appropriate nor inappropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*324*	*332*	*343*
It probably tastes good	23%	25%	22%
A wine that seems to be produced with care	23%	25%	26%
A wine I would probably enjoy for everyday drinking	24%	24%	25%
It probably is of high quality	28%	30%	29%
It inspires confidence	35%	30%	35%
A wine that is probably produced in an environmentally friendly way	35%	34%	33%
A wine I would probably be proud to serve to friends	39%	37%	35%
It probably is an ordinary wine	37%	38%	34%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (3/4)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% not / not at all appropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all German monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% Not appropriate / Not at all appropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*324*	*332*	*343*
It probably tastes good	2%	4%	5%
A wine that seems to be produced with care	5%	5%	6%
A wine I would probably enjoy for everyday drinking	8%	13%	12%
It probably is of high quality	6%	4%	9%
It inspires confidence	5%	6%	9%
A wine that is probably produced in an environmentally friendly way	5%	8%	12%
A wine I would probably be proud to serve to friends	9%	12%	13%
It probably is an ordinary wine	20%	18%	19%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Germany (n=1,000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (4/4)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% I don't know / not sure)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all German monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% I don't know / not sure	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*324*	*332*	*343*
It probably tastes good	8%	11%	9%
A wine that seems to be produced with care	10%	10%	9%
A wine I would probably enjoy for everyday drinking	6%	8%	9%
It probably is of high quality	9%	11%	10%
It inspires confidence	9%	10%	10%
A wine that is probably produced in an environmentally friendly way	14%	17%	14%
A wine I would probably be proud to serve to friends	9%	11%	10%
It probably is an ordinary wine	10%	10%	9%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Connecting wine businesses with knowledge and insights globally

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WINE INTELLIGENCE

Wine consumers' perceptions and reactions towards labelling ingredients on wine bottles

Report: Italian market, April 2021

OEnoppia

INTRODUCTION

Study findings are reported through 11 reports:

1. USA
2. Australia
3. Japan
4. France
5. Germany
6. Italy — This report
7. Russia
8. Spain
9. Sweden
10. UK
11. Multi-market management summary

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

RESEARCH OBJECTIVES

The overall objective of this study is to assess consumers' perceptions, attitudes and opinions of wine ingredients labelling

Four specific objectives have been assigned to this study:

1. Assess consumers' perceptions and knowledge of winemaking practices.

2. Asses the impact of labelling ingredients on purchase consideration and imagery of a tried and liked wine (impact on brand loyalty) and on an unknown wine (impact on new consumer acquisition).

3. Assess the impact of two levels of information: a short vs long list of ingredients.

4. Assess the level of consumer acceptance for specific ingredients.

METHODOLOGY: DATA COLLECTION

Consumer survey: data gathered via the Vinitrac® Italy omnibus survey platform:

- **Scope:** all wine drinkers living in Italy who drink wine at least once a month.
- **Sampling:** quota-based sample (age, gender, income and region of residence).
- **Data collection mode:** online.
- **Dates of data collection:** from 10th February to 22th February 2021.
- **Sample size** (after cleaning and weighting procedures): 1,000 respondents.
- Sample profile is shown in the table:

Gender	Male	45%
	Female	55%
	Total	100%
Age	18-24	4%
	25-34	8%
	35-44	13%
	45-54	19%
	55-64	16%
	65 and above	39%
	Total	100%
Annual pre-tax household income*	Less than € 15.000	2%
	Between € 15.000 and € 50.000	61%
	More than € 50.000	38%
	Total	100%
Region of residence	North East	20%
	North West	29%
	Center	23%
	South	17%
	Islands	10%
	Total	100%

*'Prefer not to answer' excluded from base

STUDY CONTEXT: MARKET SIZE

The survey is representative of the 31 million adults living in Italy who drink wine at least once a month.

	Adult population (millions)	% drink still wine*	Survey is representative of … **million wine drinkers**
USA	241	32%	77
Australia	18.2	50%	9.2
Japan	105.1	22%	23.1
France	51	75%	38
Germany	66.2	42%	27.5
Italy	49.7	62%	31
Russia	16.3	46%	7.5
Spain	38	50%	18.9
Sweden	7.9	55%	4.3
UK	52.4	49%	25.9
Total	**646**	**41%**	**262**

→ This report

*% drink red, white or rosé wine at least once a month, except in two markets:

- France: all wine drinkers who live in France (exc. Corsica and overseas territories)
- Russia: all imported wine drinkers (at least twice per year), aged between 18 and 64 years old, living in Moscow and St Petersburg

[1] Source : national statistics

[2] Source : Wine Intelligence, calibration surveys

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

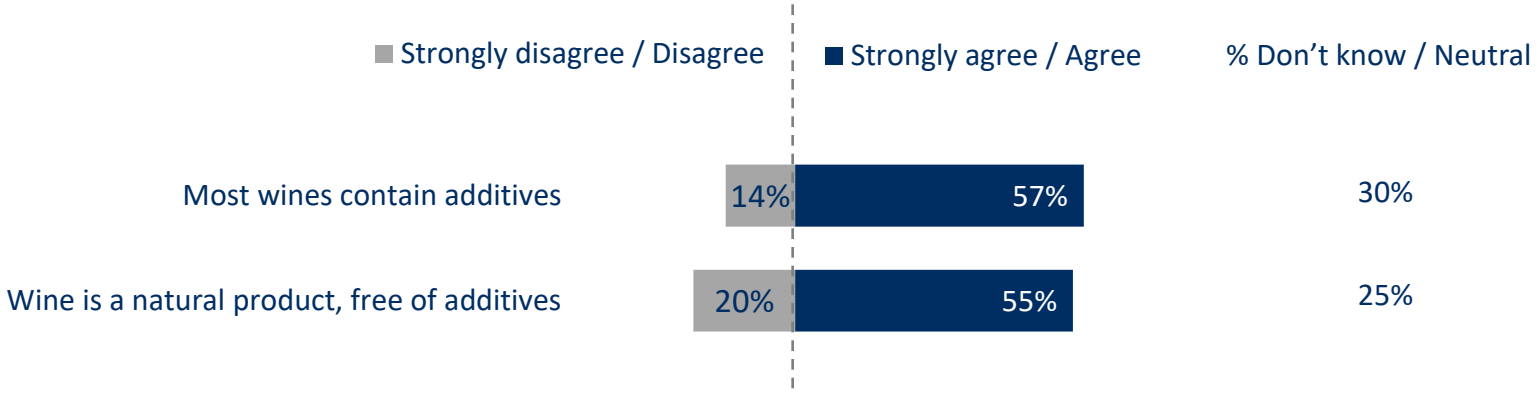
WINEMAKING PERCEPTIONS AND KNOWLEDGE (1/3)

Consumers express ambivalent views : the majority (57%) are aware that most wines contains additives but 55% also perceive wine as a natural product (i.e. free of additives).

Winemaking process perceptions and knowledge (1/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all Italian monthly wine drinkers (n=1,000)

Presence of additives in wine



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

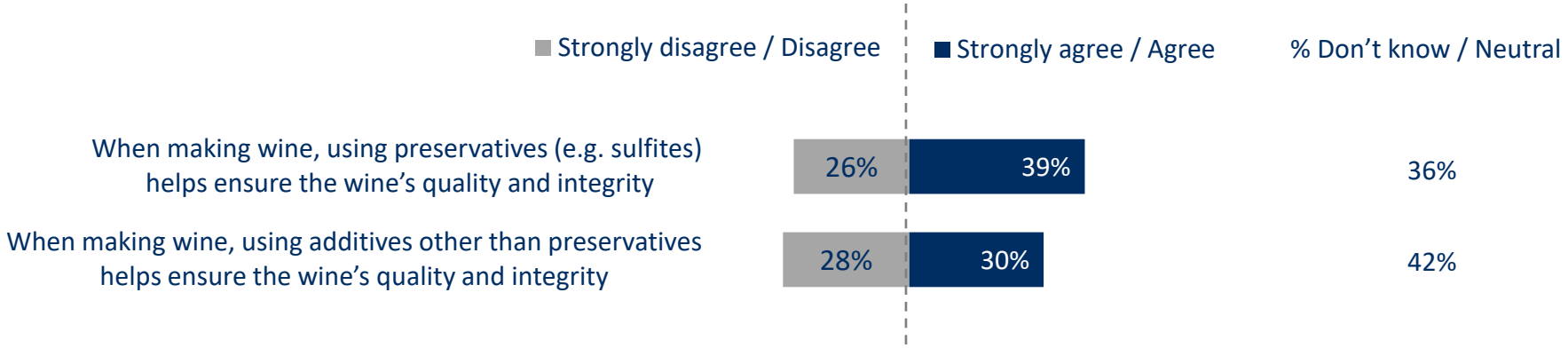
WINEMAKING PERCEPTIONS AND KNOWLEDGE (2/3)

Almost half of all respondents are neutral towards the usefulness of additives in wine whereas between 30% and 39% perceive additives as being helpful. These findings indicate that most wine consumers are not rejecting the idea that additives may be useful in the winemaking process.

Winemaking process perceptions and knowledge (2/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all Italian monthly wine drinkers (n=1,000)

Usefulness of additives in winemaking process



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

WINEMAKING PERCEPTIONS AND KNOWLEDGE (3/3)

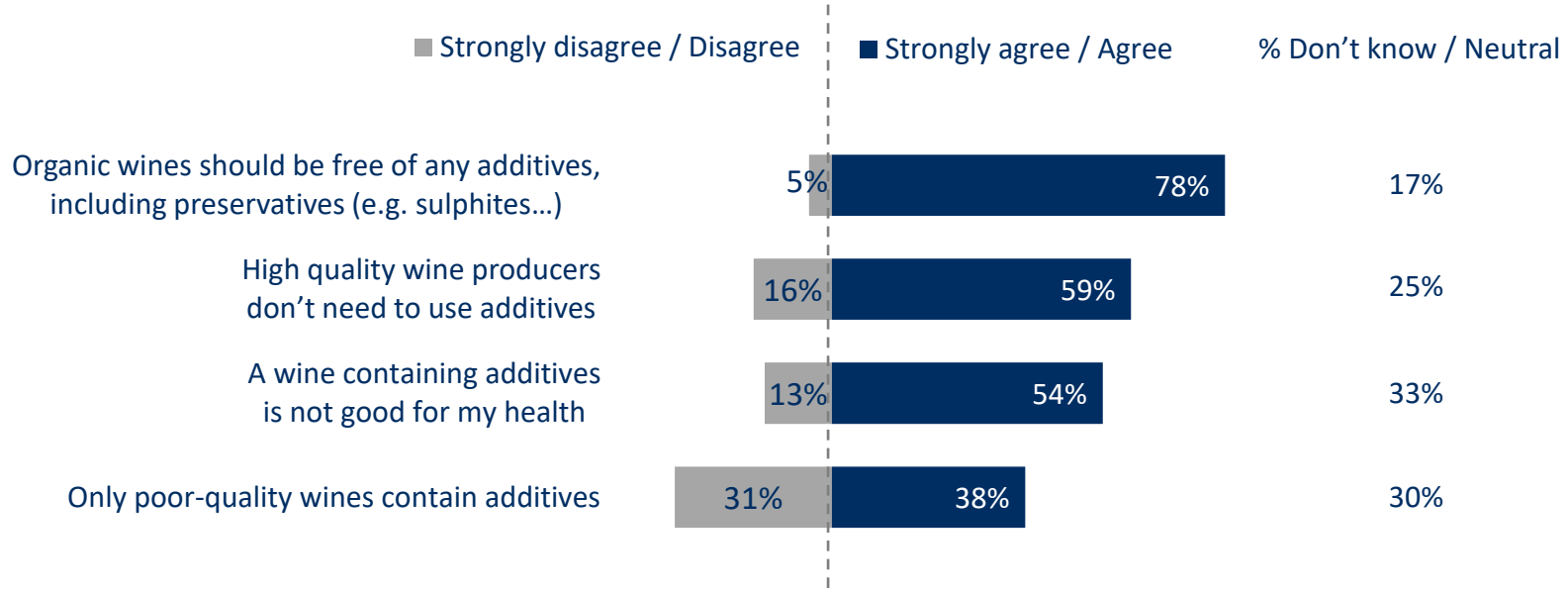
Excluding organic wines, 59% of consumers believe that high quality wines don't need to use additives and 54% have concerns about its impact on their health.

These findings show that a majority of Italian regular wine drinkers establish a link between lack of additives and product quality.

Winemaking process perceptions and knowledge (3/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all Italian monthly wine drinkers (n=1,000)

Wine additives: quality and health



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY: IMPACT OF WINE INGREDIENTS LABELLING ON A TRIED AND LIKED WINE – QUESTIONNAIRE STRUCTURE

All respondents

Respondents were asked to think about a wine they regularly buy and love drinking.

- Q2: favourite wine style (red wine / white wine / rosé wine)
- Q3: favourite wine perceptions / imagery (10 statements, using a 1-5 scale)

Respondents are informed that the back label exhibits the wine's ingredients.
Each respondent has been randomly assigned to one of the three following scenarios:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients:
"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients:
"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

- Q4: changes in opinion (1 to 5 scale)
- Q5: changes in intent to buy (1 to 5 scale)
- Q6: changes in imagery (10 statements, 1 to 5 scales)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON OVERALL OPINION

On average, the disclosure of ingredients will drive down the opinion amongst 20% of consumers. Interestingly, this negative impact is higher for 'contains sulfites' (27%), compared to a short or a long list of ingredients (13% and 18%).

Known and liked wine: impact of wine ingredients labelling on overall opinion

Question: Now knowing the ingredients it contains, does it change your opinion about this wine?
Base: all Italian monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈330 per scenario)

	Average across the three lists	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***1,000***	*338*	*326*	*336*
No, it doesn't change my opinion at all	**16%**	11%	20%	17%
No, it doesn't change my opinion much	**32%**	32%	32%	32%
It may change my opinion, I am not sure	**33%**	30%	35%	33%
Yes, it gives me a lower opinion of it	**14%**	18%	11%	13%
Yes, it gives me a rather poor opinion of it	**6%**	10%	2%	5%
Total	**100%**	100%	100%	100%

% lower / rather poor opinion	**20%**	**27%**	**13%**	**18%**

Red / Blue : significantly higher / lower than 'Average across the 3 lists' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON INTENT TO BUY

On average, the disclosure of ingredients of a favourite wine would yield 15% of consumers to be unwilling to buy it again and 24% would hesitate.

Interestingly, this negative impact (i.e. rate of rejection) is lower when disclosing a short list of ingredients vs 'contains sulfites'.

Known and liked wine: impact of wine ingredients labelling on intent to buy

Question: And how likely would you be to repurchase this wine in the future?
Base: all Italian monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈330 per scenario)

	Average across the three lists	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***1,000***	*338*	*326*	*336*
I would definitely buy it again	**28%**	26%	33%	25%
I would probably buy it again	**34%**	30%	35%	36%
I would hesitate to buy it again	**17%**	19%	16%	14%
I would probably not buy it again	**9%**	13%	5%	10%
I would definitely not buy it again	**5%**	5%	5%	6%
I don't know / not sure	**7%**	6%	5%	9%
Total	**100%**	100%	100%	100%

% probably not buy / definitely not buy again	**15%**	**18%**	**10%**	**16%**

Red / Blue : significantly higher / lower than 'Average across the 3 lists' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON IMAGERY

Disclosing the list of ingredients on the back label drives imagery perceptions down. The negative impact tends to be higher for a long list of ingredients.

Known and liked wine: impact of wine ingredients labelling on imagery

Question: Now knowing the ingredients it contains, please indicate the extent to which you feel that each of the following statements are appropriate to describe your FAVOURITE wine on a 1 to 5 scale where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Italian monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈330 per scenario)

% Appropriate / Very appropriate	Known and liked wine	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	*1,000*	*338*	*326*	*336*
A taste I like	96%	91%	91%	87%
Very good quality	93%	83%	82%	76%
A wine I am never disappointed with	89%	83%	80%	75%
Good value for money	89%	83%	83%	77%
A wine produced with care	88%	81%	81%	73%
Made by a producer that I trust	88%	83%	86%	73%
A wine that I am proud to serve to my friends/family	85%	77%	77%	72%
A wine that inspires confidence	83%	79%	78%	72%
A wine I enjoy for everyday drinking	70%	69%	74%	67%
A wine produced in an environmentally friendly way	67%	61%	59%	56%

Initial positive views shifting towards:

With "contains sulfites" or the "short list", views tend to mostly shift to neutral positions, less so to negatives ones.

With the "long list", positive views shift almost evenly towards neutral and negative views, signifying a more negative impact than a short ingredient list.

Red / Blue : significantly higher / lower than 'Known and liked wine' (confidence interval: 95%)

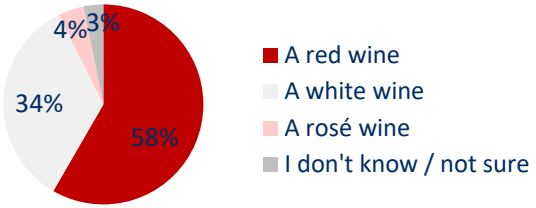
Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

KNOWN AND LIKED WINE: FINDINGS SUMMARY BY WINE TYPE PREFERENCE

The negative impact of ingredients labelling is similar for both red and white wines.

Known and like wine: by wine type

Question: Please think about your FAVOURITE wine brand or producer, i.e. a wine that you regularly buy and that you love drinking. Is this wine:
Base: all Italian monthly wine drinkers (n=1,000)



Overall opinion: % lower / rather poor opinion

	Average	Contains sulfites	Short list	Long list
Base:	***1,000***	*338*	*326*	*336*
Red	**20%**	28%	13%	18%
White	**19%**	27%	13%	17%
Rosé	**16%**	25%	0%	22%
Average all styles	**20%**	**27%**	**13%**	**18%**

Intent to buy: % probably not buy / definitely not buy again

	Average	Contains sulfites	Short list	Long list
Base:	***1,000***	*338*	*326*	*336*
Red	**15%**	18%	10%	18%
White	**15%**	18%	11%	15%
Rosé	**13%**	24%	8%	11%
Average all styles	**15%**	**18%**	**10%**	**16%**

On average, the negative impact of ingredients labelling is similar for both red and white wines (sample is too low for rosé wines). A short list is preferable whereas 'contains sulfites' drove opinions down the most

Red / Blue : significantly higher / lower than 'Average all colours' (confidence interval: 95%) - Grey: small sample size (n<50)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine :
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY : IMPACT OF WINE INGREDIENTS LABELLING ON A NEW WINE – QUESTIONNAIRE STRUCTURE

We asked respondents to imagine they are in a shop and that they spot a wine that seems to match the type of wine they like to drink. Each respondent was randomly assigned to 1 of the 3 possible scenarios of back labels:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"



"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

Each respondent was shown either a **white** wine (≈50% of respondents) or a **red** wine (≈50% of respondents) back label.

Q7: new wine – consideration to buy (1 to 5 scale)

Q8: new wine – price range perception (scale ranging from 'very low end' to 'very high-end')

Q9: new wine – perceptions / imagery (8 statements, using a scale)

Note: back labels are shown in the appendix.

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

RED WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

Findings show that the shift from 'contains sulfites' to a list of ingredients doesn't significantly impact the likelihood of trialling a new red wine.

Red wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this wine?
Base: all Italian monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***169***	*164*	*170*
I would consider / strongly consider buying it	**56%**	51%	51%
I may consider buying it	**27%**	34%	29%
I would probably not / definitely not consider buying it	**15%**	12%	13%
I don't know / not sure	**2%**	3%	6%
Total	**100%**	100%	100%

Net (% would buy - % would not consider buying)	**41%**	**38%**	**38%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

RED WINE BACK LABEL : IMPACT OF WINE INGREDIENTS LABELLING (2/3)

The disclosure of all wine ingredients tends to raise some uncertainty amongst about 10% of consumers.

A long list of ingredients drives the perceived value down towards 'Average'.

Red wine back label: impact of ingredients labelling on price perceptions

Question: This wine is probably…
Base: all Italian monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***169***	*164*	*170*
Very high-end	**1%**	2%	2%
High end	**35%**	33%	20%
Average	**53%**	52%	61%
Low end	**8%**	4%	6%
Very low-end	**0%**	1%	1%
I don't know / not sure	**3%**	8%	11%
Total	**100%**	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

RED WINE BACK LABEL : IMPACT OF WINE INGREDIENTS LABELLING (3/3)

A long list drives imagery down, almost across the board. However, a short list doesn't significantly impact it.

Red wine back label: impact of ingredients labelling on wine imagery

Question: Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Italian monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈160)

% Appropriate / Very appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base:	***169***	*164*	*170*
It probably tastes good	**79%**	82%	65%
A wine that seems to be produced with care	**76%**	71%	60%
It inspires confidence	**74%**	70%	57%
A wine I would probably be proud to serve to friends	**64%**	60%	52%
It probably is of high quality	**62%**	55%	50%
A wine that is probably produced in an environmentally friendly way	**56%**	53%	48%
A wine I would probably enjoy for everyday drinking	**54%**	47%	40%
It probably is an ordinary wine	**31%**	29%	32%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

Findings suggest that a long list of ingredients drives the likelihood of trialling a new white wine down (note: differences are not statistically significant). However, a short list has little impact.

White wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this wine?
Base: all Italian monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***169***	*162*	*166*
I would consider / strongly consider buying it	**42%**	45%	37%
I may consider buying it	**37%**	40%	37%
I would probably not / definitely not consider buying it	**16%**	12%	19%
I don't know / not sure	**4%**	3%	7%
Total	**100%**	100%	100%
Net impact (% would buy - % would not consider buying)	**26%**	**33%**	**18%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (2/3)

The format of the wine ingredients list has little impact on the perceived price of a white wine.

White wine back label: impact of ingredients labelling on price perceptions

Question: This wine is probably…
Base: all Italian monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***169***	*162*	*166*
Very high-end	**3%**	0%	2%
High end	**29%**	31%	27%
Average	**56%**	58%	52%
Low end	**5%**	6%	8%
Very low-end	**0%**	0%	2%
I don't know / not sure	**7%**	6%	9%
Total	**100%**	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (3/3)

Consumers perceive few differences between 'contains sulfites' and a short list of ingredients. However, a long list lowers the perception that a wine was produced with care and lowers consumer confidence in the wine.

White wine back label: impact of ingredients labelling on wine imagery

Question: Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Italian monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈160)

% Appropriate / Very appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base:	***169***	*162*	*166*
It probably tastes good	**76%**	80%	68%
A wine that seems to be produced with care	**74%**	75%	64%
It inspires confidence	**70%**	70%	55%
A wine I would probably be proud to serve to friends	**61%**	60%	51%
It probably is of high quality	**55%**	58%	50%
A wine that is probably produced in an environmentally friendly way	**52%**	58%	43%
A wine I would probably enjoy for everyday drinking	**45%**	49%	41%
It probably is an ordinary wine	**30%**	28%	32%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY: IMPACT OF WINE INGREDIENTS LABELLING ON A NEW SPARKLING WINE – QUESTIONNAIRE STRUCTURE

Respondents were asked to imagine they are in a shop and that they spot a wine that seems to match the type of sparkling wine they like to drink. Each respondent is (randomly) shown one of the 3 possible **sparkling wine** back labels:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"



"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

- Q10: new wine – consideration to buy (1 to 5 scale)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

SPARKLING WINE: IMPACT OF INGREDIENTS LABELLING

The disclosure of wine ingredients doesn't significantly impact the likelihood to trial a new sparkling wine.

Sparkling wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this sparkling wine?
Base: all Italian monthly wine drinkers (randomly) assigned to one of the 3 possible sparkling wine back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***338***	*326*	*336*
I would consider / strongly consider buying it	**34%**	32%	31%
I may consider buying it	**35%**	38%	35%
I would probably not / definitely not consider buying it	**28%**	26%	28%
I don't know / not sure	**3%**	5%	6%
Total	**100%**	100%	100%

Net impact (% would consider - % would not consider)	***6%***	*6%*	*2%*

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

SPECIFIC WINE INGREDIENTS ACCEPTANCE: METHODOLOGY

We asked respondents to imagine they are in a shop and that they spot a wine that seems to match the type of wine they like to drink. Each respondent is (randomly) assigned to one of the two following scenarios:

Scenario 1 (≈50% of respondents)

Respondents are exposed to a list of ingredients with no information.

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)
- Tartaric acid
- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate

Scenario 2 (≈50% of respondents)

Respondents are exposed to the same list but with short explanations.

Ingredients used to better preserve the wine:

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)

Ingredients used to better maintain the quality of the wine (stabilise it and / or regulate its level of acidity):

- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate
- Tartaric acid

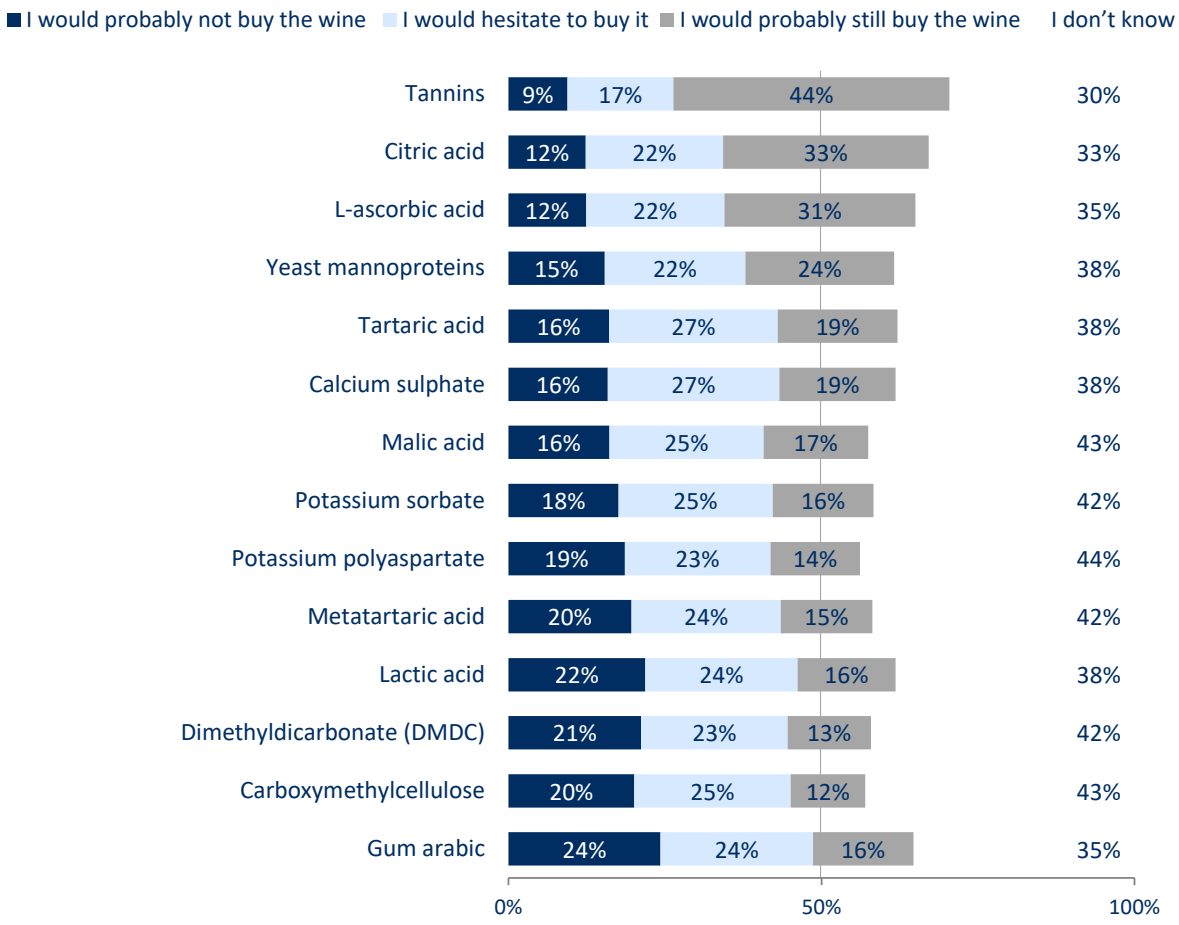
Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

ACCEPTANCE OF SPECIFIC INGREDIENTS: WITHOUT INFORMATION

Tannins are by far the most accepted ingredient (44% would still buy the wine vs 21% on average). Most other ingredients tend to mostly yield uncertain views, rather than outright rejection.

Acceptance of specific wine ingredients: without information

Question: For each of these ingredients, what would your reaction be? Base : all Italian monthly wine drinkers (randomly) assigned to the scenario ' No information' (n=512)



	Average scores
Base:	*512*
% 'Still buy'	21%
% 'Hesitate'	24%
% 'Not buy'	17%
% 'Don't know'	39%

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

ACCEPTANCE OF SPECIFIC INGREDIENTS: IMPACT OF EDUCATION

Providing a short explanation on why an ingredient is used significantly helps to reassure consumers. Overall, it improves the rate of acceptance and lowers rejection by about +10pts on average.

Acceptance of specific wine ingredients: impact of education

Question: For each of these ingredients, what would your reaction be?
Base: all Italian monthly wine drinkers (randomly) assigned to the scenario ' Short explanation' (n=488)

	% I would probably not buy the wine	% I would hesitate to buy it	% I would probably still buy the wine	% I don't know / not sure
Tannins	ns	ns	ns	ns
Citric acid	-4 pts	ns	+10 pts	ns
L-ascorbic acid	-5 pts	ns	+15 pts	-8 pts
Yeast mannoproteins	-6 pts	ns	+10 pts	ns
Tartaric acid	-5 pts	ns	+11 pts	ns
Calcium sulphate	-5 pts	ns	+8 pts	ns
Malic acid	ns	ns	+6 pts	ns
Potassium sorbate	-8 pts	ns	+12 pts	-8 pts
Potassium polyaspartate	ns	ns	+5 pts	ns
Metatartaric acid	-6 pts	ns	+6 pts	ns
Lactic acid	-6 pts	ns	+8 pts	ns
Dimethyldicarbonate (DMDC)	-7 pts	+6 pts	+7 pts	ns
Carboxymethylcellulose	ns	ns	+6 pts	ns
Gum arabic	-10 pts	ns	+8 pts	ns

Without information → With information

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)
- Tartaric acid
- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate

Ingredients used to better preserve the wine:

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)

Ingredients used to better maintain the quality of the wine (stabilise it and/or regulate its level of acidity):

- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate
- Tartaric acid

ns = not significant

Red / Blue : significantly higher / lower than 'Without information' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

CONCLUSIONS: KEY TAKEAWAYS

- Most consumers don't reject the idea of the use of additives in the winemaking process.

  Even if they express ambivalent views about the presence of additives in wine, most consumers will agree or are neutral regarding their usefulness in the winemaking process.

- However, 59% believe that good quality wines don't need additives and 54% express concerns regarding their impact on health. Providing reassurance on both counts are key points to consider.

- The disclosure of ingredients of a known and trusted wine yields more uncertainty than rejection.

  14% of consumers state they would stop buying the wine and **24% would hesitate**. The disclosure of wine ingredients yields a decrease in imagery perceptions though ratings remain quite high. A short list of ingredients is preferable to both a long one or to 'contains sulfites' only.

- The disclosure of ingredients doesn't impact the willingness to trial an unknown red wine.

  However, a long list drives down both perceived value and imagery. A short list is preferable as it doesn't modify the perceptions compared with 'contains sulfites'.

- The disclosure of ingredients doesn't impact the willingness to trial an unknown white wine.

  However, a long list of ingredients lowers imagery perception (specifically regarding confidence level and the idea that the wine was produced with care).

- Regarding specific ingredients, **tannins** are well accepted. For other ingredients, the most common reaction is uncertainty (on average, 39% 'don't know / unsure'), more so than outright rejection. **Education** (i.e. explaining why ingredients are used) helps to significantly increase the level of acceptance.

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices
   - New wine: back labels shown to respondents
   - New wine: average findings (white + red wine merged)

APPENDIX : METHODOLOGY – TESTED BACK LABELS (STILL WINE)

Red wine back label:







White wine back label:







Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

APPENDIX : METHODOLOGY – TESTED BACK LABELS (SPARKLING WINE)

Sparkling wine back label:







Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices
   - Trialling a new wine: back labels shown to respondents
   - Trialling a new wine: average findings (white + red wine merged)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

Still (white + red) wine back label: impact of ingredients labelling on consideration to buy

Question : To what extent would you consider buying this wine?
Base: all Italian monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***338***	*326*	*336*
I would consider / strongly consider buying it	**50%**	48%	44%
I may consider buying it	**32%**	37%	33%
I would probably not / definitely not consider buying it	**15%**	12%	16%
I don't know / not sure	**3%**	3%	6%
Total	**100%**	100%	100%

Net impact (% would buy - % would not consider buying)	**35%**	**36%**	**28%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (2/3)

Still (white + red) wine back label : impact of ingredients labelling on price perceptions

Question : This wine is probably…
Base: all Italian monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***338***	*326*	*336*
Very high-end	**2%**	1%	2%
High end	**32%**	32%	24%
Average	**54%**	55%	56%
Low end	**6%**	5%	7%
Very low-end	**0%**	0%	1%
I don't know / not sure	**5%**	7%	10%
Total	**100%**	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (1/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% appropriate / very appropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Italian monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% Appropriate / Very appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base :	***338***	*326*	*336*
It probably tastes good	**78%**	81%	67%
A wine that seems to be produced with care	**75%**	73%	63%
It inspires confidence	**73%**	70%	56%
A wine I would probably be proud to serve to friends	**63%**	60%	52%
It probably is of high quality	**59%**	56%	50%
A wine that is probably produced in an environmentally friendly way	**54%**	56%	45%
A wine I would probably enjoy for everyday drinking	**50%**	48%	41%
It probably is an ordinary wine	**31%**	28%	32%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (2/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% neither appropriate not inappropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Italian monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% Neither appropriate nor inappropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base :	***338***	*326*	*336*
It probably tastes good	**17%**	14%	22%
A wine that seems to be produced with care	**18%**	17%	22%
It inspires confidence	**18%**	22%	29%
A wine I would probably be proud to serve to friends	**25%**	28%	30%
It probably is of high quality	**28%**	29%	27%
A wine that is probably produced in an environmentally friendly way	**28%**	28%	30%
A wine I would probably enjoy for everyday drinking	**29%**	33%	33%
It probably is an ordinary wine	**33%**	35%	33%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (3/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% not / not at all appropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Italian monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% Not appropriate / Not at all appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base :	***338***	*326*	*336*
It probably tastes good	**2%**	1%	3%
A wine that seems to be produced with care	**4%**	4%	7%
It inspires confidence	**7%**	4%	8%
A wine I would probably be proud to serve to friends	**9%**	6%	10%
It probably is of high quality	**8%**	8%	12%
A wine that is probably produced in an environmentally friendly way	**8%**	7%	14%
A wine I would probably enjoy for everyday drinking	**17%**	11%	17%
It probably is an ordinary wine	**31%**	28%	25%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (4/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% I don't know / not sure)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Italian monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% I don't know / not sure	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base :	***338***	*326*	*336*
It probably tastes good	**3%**	4%	8%
A wine that seems to be produced with care	**3%**	6%	8%
It inspires confidence	**3%**	3%	7%
A wine I would probably be proud to serve to friends	**3%**	6%	8%
It probably is of high quality	**5%**	7%	10%
A wine that is probably produced in an environmentally friendly way	**9%**	9%	11%
A wine I would probably enjoy for everyday drinking	**4%**	8%	9%
It probably is an ordinary wine	**6%**	8%	11%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Italy (n=1,000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (5/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Italian monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

Net impact (positive - negative)	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base :	***338***	*326*	*336*
It probably tastes good	**76%**	80%	63%
A wine that seems to be produced with care	**71%**	69%	55%
It inspires confidence	**66%**	66%	49%
A wine I would probably be proud to serve to friends	**54%**	54%	41%
It probably is of high quality	**51%**	48%	38%
A wine that is probably produced in an environmentally friendly way	**46%**	49%	31%
A wine I would probably enjoy for everyday drinking	**33%**	37%	23%
It probably is an ordinary wine	**0%**	0%	7%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Connecting wine businesses with knowledge and insights globally

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WINE INTELLIGENCE

Wine consumers' perceptions and reactions towards labelling ingredients on wine bottles

Report: Japanese market, April 2021

OEnoppia

INTRODUCTION

Study findings are reported through 11 reports:

1. USA
2. Australia
3. Japan — This report
4. France
5. Germany
6. Italy
7. Russia
8. Spain
9. Sweden
10. UK
11. Multi-market management summary

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
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6. Conclusions
7. Appendices

RESEARCH OBJECTIVES

The overall objective of this study is to assess consumers' perceptions, attitudes and opinions of wine ingredients labelling

Four specific objectives have been assigned to this study:

1. Assess consumers' perceptions and knowledge of winemaking practices.

2. Asses the impact of labelling ingredients on purchase consideration and imagery of a tried and liked wine (impact on brand loyalty) and on an unknown wine (impact on new consumer acquisition).

3. Assess the impact of two levels of information: a short vs long list of ingredients.

4. Assess the level of consumer acceptance for specific ingredients.

METHODOLOGY: DATA COLLECTION

Consumer survey: data gathered via the Vinitrac® Japan omnibus survey platform:

- **Scope:** all wine drinkers living in Japan who drink wine at least once a month.
- **Sampling:** quota-based sample (age and gender).
- **Data collection mode:** online.
- **Dates of data collection:** from 5th February to 17th February 2021.
- **Sample size** (after cleaning and weighting procedures): 1,000 respondents.
- Sample profile is shown in the table:

Gender	Male	44%
	Female	56%
	Total	100%
Age	20-24	2%
	25-34	8%
	35-44	10%
	45-54	17%
	55 and above	63%
	Total	100%

STUDY CONTEXT: MARKET SIZE

The survey is representative of the 23.1 million adults living in Japan who drink wine at least once a month.

	Adult population (millions)	% drink still wine*	Survey is representative of … **million wine drinkers**
USA	241	32%	77
Australia	18.2	50%	9.2
Japan	105.1	22%	23.1
France	51	75%	38
Germany	66.2	42%	27.5
Italy	49.7	62%	31
Russia	16.3	46%	7.5
Spain	38	50%	18.9
Sweden	7.9	55%	4.3
UK	52.4	49%	25.9
Total	**646**	**41%**	**262**

→ This report

*% drink red, white or rosé wine at least once a month, except in two markets:

- France: all wine drinkers who live in France (exc. Corsica and overseas territories)
- Russia: all imported wine drinkers (at least twice per year), aged between 18 and 64 years old, living in Moscow and St Petersburg

[1] Source : national statistics

[2] Source : Wine Intelligence, calibration surveys

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

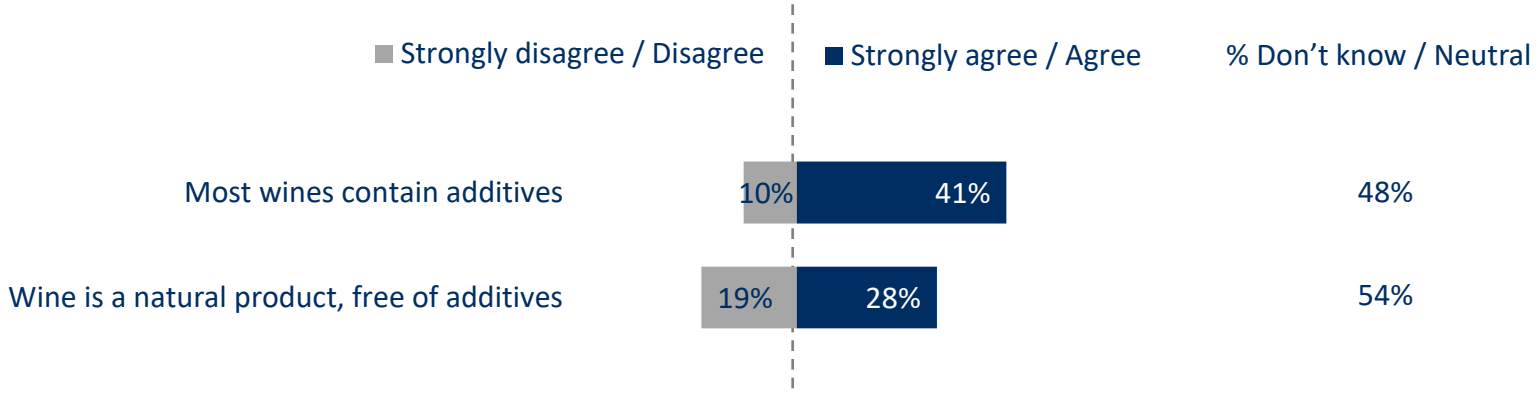
WINEMAKING PERCEPTIONS AND KNOWLEDGE (1/3)

About half of consumers are either neutral or unsure as to the presence of additives in wine. However, a greater proportion (41%) believe they are contained in wine than those who believe wine is additive-free (28%).

Winemaking process perceptions and knowledge (1/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all Japanese monthly wine drinkers (n=1,000)

Presence of additives in wine



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

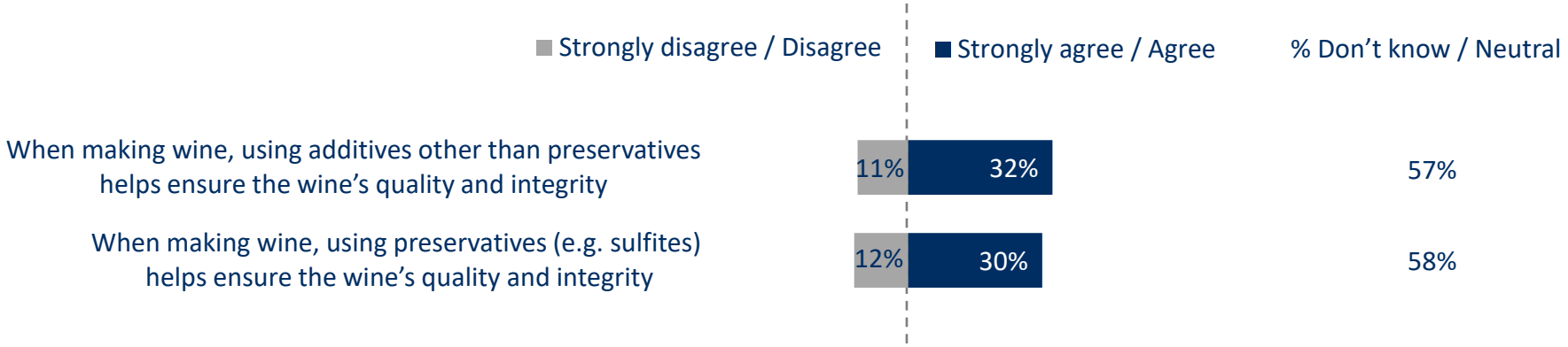
WINEMAKING PERCEPTIONS AND KNOWLEDGE (2/3)

Regarding the usefulness of using additives in wine, the most common view is neutrality (about 57%). Very few (about 1 in 10) perceive it's not useful.

Winemaking process perceptions and knowledge (2/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all Japanese monthly wine drinkers (n=1,000)

Usefulness of additives in winemaking process



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

WINEMAKING PERCEPTIONS AND KNOWLEDGE (3/3)

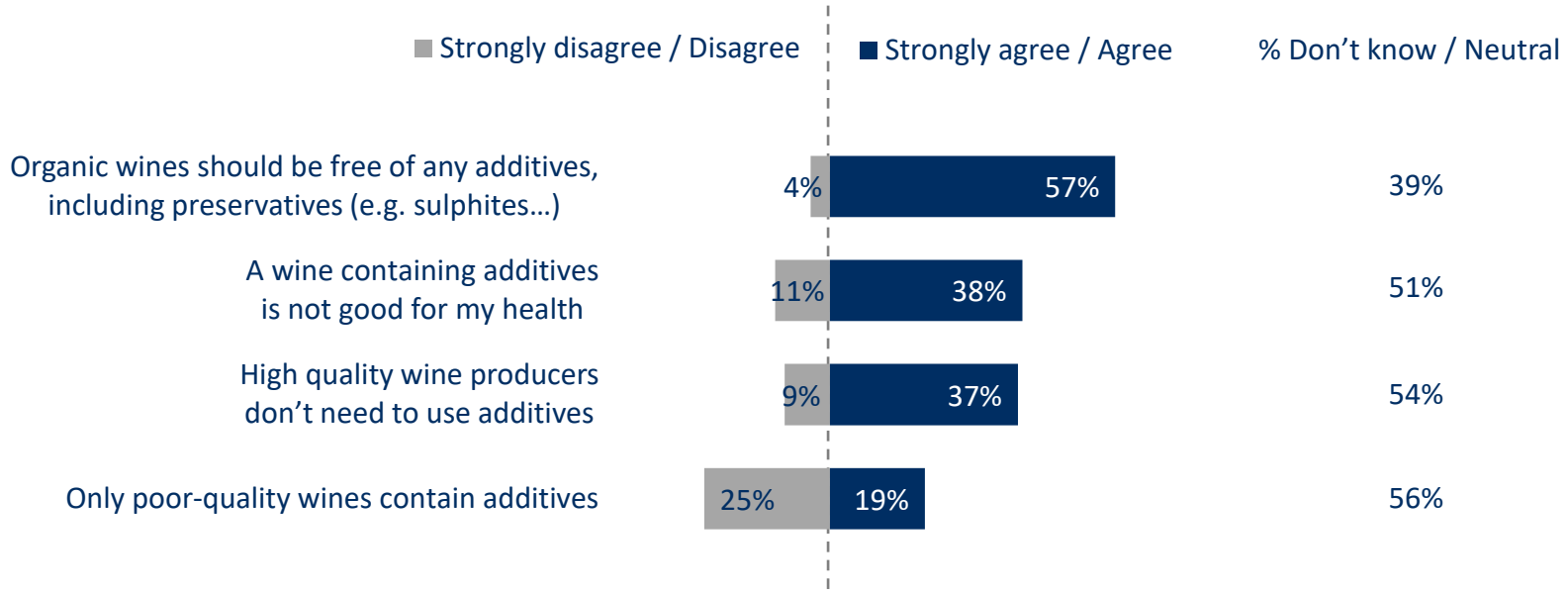
Excluding organic wines, about half of consumers are unsure or neutral regarding the existence of a correlation between the presence of additives and the quality of the wine.

However, 38% have concerns about the impact of additives on their health.

Winemaking process perceptions and knowledge (3/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all Japanese monthly wine drinkers (n=1,000)

Wine additives: quality and health



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY: IMPACT OF WINE INGREDIENTS LABELLING ON A TRIED AND LIKED WINE – QUESTIONNAIRE STRUCTURE

All respondents

Respondents were asked to think about a wine they regularly buy and love drinking.

- Q2: favourite wine style (red wine / white wine / rosé wine)
- Q3: favourite wine perceptions / imagery (10 statements, using a 1-5 scale)

Respondents are informed that the back label exhibits the wine's ingredients.
Each respondent has been randomly assigned to one of the three following scenarios:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients:
"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients:
"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

- Q4: changes in opinion (1 to 5 scale)
- Q5: changes in intent to buy (1 to 5 scale)
- Q6: changes in imagery (10 statements, 1 to 5 scales)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON OVERALL OPINION

On average, the disclosure of ingredients will drive down the opinion amongst 30% of consumers. Interestingly, this negative impact is lower for a short list vs 'contains sulfites'.

Known and liked wine: impact of wine ingredients labelling on overall opinion

Question: Now knowing the ingredients it contains, does it change your opinion about this wine?
Base: all Japanese monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈330 per scenario)

	Average across the three lists	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***1,000***	*333*	*330*	*338*
No, it doesn't change my opinion at all	**4%**	5%	4%	4%
No, it doesn't change my opinion much	**23%**	18%	32%	19%
It may change my opinion, I am not sure	**42%**	43%	38%	46%
Yes, it gives me a lower opinion of it	**23%**	26%	21%	22%
Yes, it gives me a rather poor opinion of it	**7%**	9%	5%	8%
Total	**100%**	100%	100%	100%

% lower / rather poor opinion	**30%**	**35%**	**26%**	**31%**

Red / Blue : significantly higher / lower than 'Average across the 3 lists' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON INTENT TO BUY

On average, the disclosure of ingredients of a favourite wine would yield 12% of consumers to be unwilling to buy it again and 44% would hesitate or be unsure.

Interestingly, acceptance (i.e. positive intent to buy again) is higher for a short list compared to either 'contains sulfites' or a long list.

Known and liked wine: impact of wine ingredients labelling on intent to buy

Question: And how likely would you be to repurchase this wine in the future?
Base: all Japanese monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈330 per scenario)

	Average across the three lists	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***1,000***	*333*	*330*	*338*
I would definitely buy it again	**5%**	6%	6%	3%
I would probably buy it again	**40%**	34%	46%	39%
I would hesitate to buy it again	**27%**	33%	23%	24%
I would probably not buy it again	**9%**	9%	8%	11%
I would definitely not buy it again	**2%**	3%	1%	3%
I don't know / not sure	**17%**	15%	15%	21%
Total	**100%**	100%	100%	100%
% probably not buy / definitely not buy again	**12%**	**12%**	**10%**	**13%**

Red / Blue : significantly higher / lower than 'Average across the 3 lists' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON IMAGERY

Disclosing the list of ingredients on the back label drives imagery perceptions down across the board. The negative impact is a little bit lower for a short list of ingredients compared with the other two labelling types.

Known and liked wine: impact of wine ingredients labelling on imagery

Question: Now knowing the ingredients it contains, please indicate the extent to which you feel that each of the following statements are appropriate to describe your FAVOURITE wine on a 1 to 5 scale where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Japanese monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈330 per scenario)

% Appropriate / Very appropriate	**Known and liked wine**	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***1,000***	*333*	*330*	*338*
A taste I like	**88%**	74%	76%	74%
Good value for money	**83%**	65%	69%	69%
A wine I enjoy for everyday drinking	**76%**	61%	73%	63%
A wine I am never disappointed with	**71%**	55%	60%	55%
A wine produced with care	**70%**	55%	57%	54%
Made by a producer that I trust	**68%**	55%	59%	58%
Very good quality	**62%**	51%	53%	54%
A wine that I am proud to serve to my friends/family	**55%**	45%	47%	43%
A wine produced in an environmentally friendly way	**50%**	43%	46%	43%
A wine that inspires confidence	**45%**	36%	39%	39%

Initial positive views are mostly shifting towards neutral views.

Red / Blue : significantly higher / lower than 'Known and liked wine' (confidence interval: 95%)

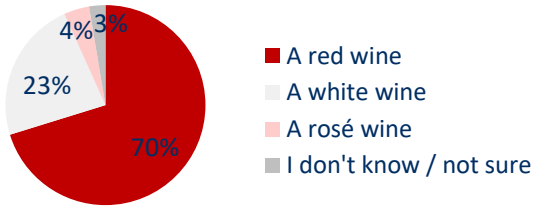
Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

KNOWN AND LIKED WINE: FINDINGS SUMMARY BY WINE TYPE PREFERENCE

On average, the negative impact of ingredients labelling is not significantly different between a red and a white wine (note: sample size for rosé wines is too small to be interpreted).

Known and like wine: by wine type

Question: Please think about your FAVOURITE wine brand or producer, i.e. a wine that you regularly buy and that you love drinking. Is this wine:
Base: all Japanese monthly wine drinkers (n=1,000)



Overall opinion: % lower / rather poor opinion

	Average	Contains sulfites	Short list	Long list
Base:	***1,000***	*333*	*330*	*338*
Red	**30%**	32%	26%	32%
White	**31%**	37%	25%	31%
Rosé	**41%**	61%	54%	7%
Average all styles	**30%**	**35%**	**26%**	**31%**

Intent to buy: % probably not buy / definitely not buy again

	Average	Contains sulfites	Short list	Long list
Base:	***1,000***	*333*	*330*	*338*
Red	**12%**	14%	9%	12%
White	**11%**	8%	12%	15%
Rosé	**12%**	12%	11%	14%
Average all styles	**12%**	**12%**	**10%**	**13%**

Red / Blue : significantly higher / lower than 'Average all colours' (confidence interval: 95%) - Grey: small sample size (n<50)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine :
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY : IMPACT OF WINE INGREDIENTS LABELLING ON A NEW WINE – QUESTIONNAIRE STRUCTURE

We asked respondents to imagine they are in a shop and that they spot a wine that seems to match the type of wine they like to drink. Each respondent was randomly assigned to 1 of the 3 possible scenarios of back labels:

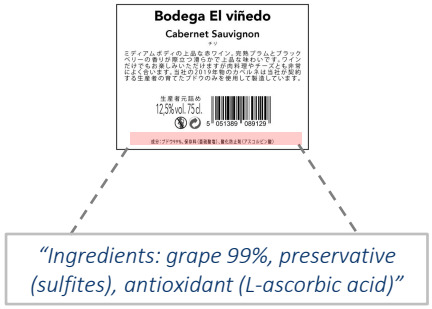
Scenario 1 (≈1/3 of respondents)

"Contains sulfites"



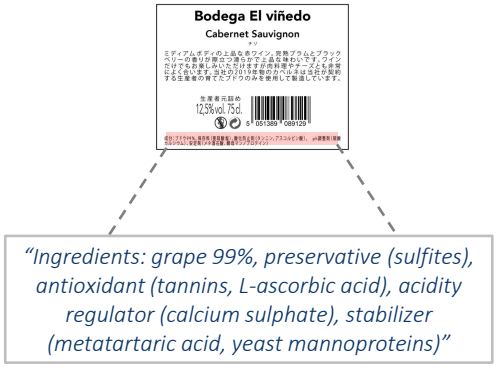
Scenario 2 (≈1/3 of respondents)

Short list of ingredients



Scenario 3 (≈1/3 of respondents)

Long list of ingredients



Each respondent was shown either a **white** wine (≈50% of respondents) or a **red** wine (≈50% of respondents) back label.

Q7: new wine – consideration to buy (1 to 5 scale)

Q8: new wine – price range perception (scale ranging from 'very low end' to 'very high-end')

Q9: new wine – perceptions / imagery (8 statements, using a scale)

Note: back labels are shown in the appendix.

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

RED WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

The shift from 'contains sulfites' to the full list of ingredients (i.e. short or long list) yields a lower likelihood of trialling a new red wine with consumers tending to become more neutral towards the product.

Red wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this wine?
Base: all Japanese monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***164***	*159*	*168*
I would consider / strongly consider buying it	**47%**	37%	36%
I may consider buying it	**30%**	40%	38%
I would probably not / definitely not consider buying it	**14%**	12%	17%
I don't know / not sure	**9%**	12%	9%
Total	**100%**	100%	100%

Net (% would buy - % would not consider buying)	**33%**	**25%**	**18%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

RED WINE BACK LABEL : IMPACT OF WINE INGREDIENTS LABELLING (2/3)

A short list of ingredients doesn't seem to have an impact on the perceived price of an unknown red wine. Conversely, a long list drives perceived value down.

Red wine back label: impact of ingredients labelling on price perceptions

Question: This wine is probably…
Base: all Japanese monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***164***	*159*	*168*
Very high-end	**1%**	1%	1%
High end	**26%**	21%	16%
Average	**53%**	50%	51%
Low end	**8%**	12%	18%
Very low-end	**1%**	3%	1%
I don't know / not sure	**12%**	14%	13%
Total	100%	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

RED WINE BACK LABEL : IMPACT OF WINE INGREDIENTS LABELLING (3/3)

A wine with a long list of ingredients drives imagery down. This is less the case with a short list, although wines with this label were significantly less likely to be perceived as an enjoyable wine for everyday drinking.

Red wine back label: impact of ingredients labelling on wine imagery

Question: Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Japanese monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈160)

% Appropriate / Very appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base:	***164***	*159*	*168*
It probably tastes good	**67%**	60%	52%
A wine I would probably enjoy for everyday drinking	**62%**	50%	44%
A wine that seems to be produced with care	**56%**	53%	46%
It probably is of high quality	**47%**	43%	37%
A wine I would probably be proud to serve to friends	**42%**	34%	28%
A wine that is probably produced in an environmentally friendly way	**38%**	40%	34%
It inspires confidence	**37%**	33%	24%
It probably is an ordinary wine	**28%**	35%	29%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

Findings suggest that the shift from 'contains sulfites' to a long list of ingredients decreases the willingness to trial a new white wine (note: difference is not statistically significant). A short list doesn't seem to have much impact on consideration levels.

White wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this wine?
Base: all Japanese monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***169***	*171*	*169*
I would consider / strongly consider buying it	**45%**	41%	34%
I may consider buying it	**33%**	40%	41%
I would probably not / definitely not consider buying it	**16%**	13%	17%
I don't know / not sure	**6%**	6%	8%
Total	**100%**	100%	100%

Net impact (% would buy - % would not consider buying)	**29%**	**27%**	**18%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (2/3)

The shift from 'contains sulfites' to a full list of ingredients seems to yield ambivalent views. Some consumers perceive the wine to be of higher end while others are unsure.

White wine back label: impact of ingredients labelling on price perceptions

Question: This wine is probably…
Base: all Japanese monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***169***	*171*	*169*
Very high-end	**1%**	1%	1%
High end	**15%**	22%	12%
Average	**56%**	54%	66%
Low end	**21%**	11%	9%
Very low-end	**2%**	2%	2%
I don't know / not sure	**6%**	11%	10%
Total	**100%**	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (3/3)

A long list of ingredients drives imagery down on two counts: the brand is less likely to be perceived as delivering a good taste or as being enjoyable for everyday drinking.

White wine back label: impact of ingredients labelling on wine imagery

Question: Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Japanese monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈160)

% Appropriate / Very appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base:	***169***	*171*	*169*
It probably tastes good	**71%**	68%	59%
A wine I would probably enjoy for everyday drinking	**63%**	61%	51%
A wine that seems to be produced with care	**57%**	58%	54%
It probably is of high quality	**49%**	54%	49%
A wine I would probably be proud to serve to friends	**39%**	40%	35%
A wine that is probably produced in an environmentally friendly way	**36%**	42%	42%
It probably is an ordinary wine	**33%**	33%	38%
It inspires confidence	**32%**	35%	34%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

CONTENTS

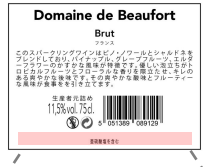
1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY: IMPACT OF WINE INGREDIENTS LABELLING ON A NEW SPARKLING WINE – QUESTIONNAIRE STRUCTURE

Respondents were asked to imagine they are in a shop and that they spot a wine that seems to match the type of sparkling wine they like to drink. Each respondent is (randomly) shown one of the 3 possible **sparkling wine** back labels:

Scenario 1 (≈1/3 of respondents)

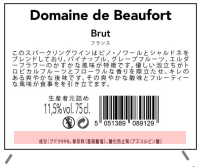
"Contains sulfites"



"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

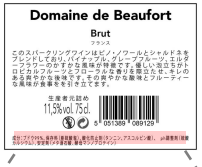
Short list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

- Q10: new wine – consideration to buy (1 to 5 scale)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

SPARKLING WINE: IMPACT OF INGREDIENTS LABELLING

The format of ingredients labelling doesn't seem to significantly impact the likelihood of trialling an unknown sparkling wine.

Sparkling wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this sparkling wine?
Base: all Japanese monthly wine drinkers (randomly) assigned to one of the 3 possible sparkling wine back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***333***	*330*	*338*
I would consider / strongly consider buying it	**37%**	34%	34%
I may consider buying it	**36%**	35%	34%
I would probably not / definitely not consider buying it	**19%**	23%	22%
I don't know / not sure	**8%**	8%	11%
Total	**100%**	100%	100%

Net impact (% would consider - % would not consider)	***18%***	*11%*	*12%*

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

SPECIFIC WINE INGREDIENTS ACCEPTANCE: METHODOLOGY

We asked respondents to imagine they are in a shop and that they spot a wine that seems to match the type of wine they like to drink. Each respondent is (randomly) assigned to one of the two following scenarios:

Scenario 1 (≈50% of respondents)

Respondents are exposed to a list of ingredients with no information.

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)
- Tartaric acid
- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate

Scenario 2 (≈50% of respondents)

Respondents are exposed to the same list but with short explanations.

Ingredients used to better preserve the wine:

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)

Ingredients used to better maintain the quality of the wine (stabilise it and / or regulate its level of acidity):

- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate
- Tartaric acid

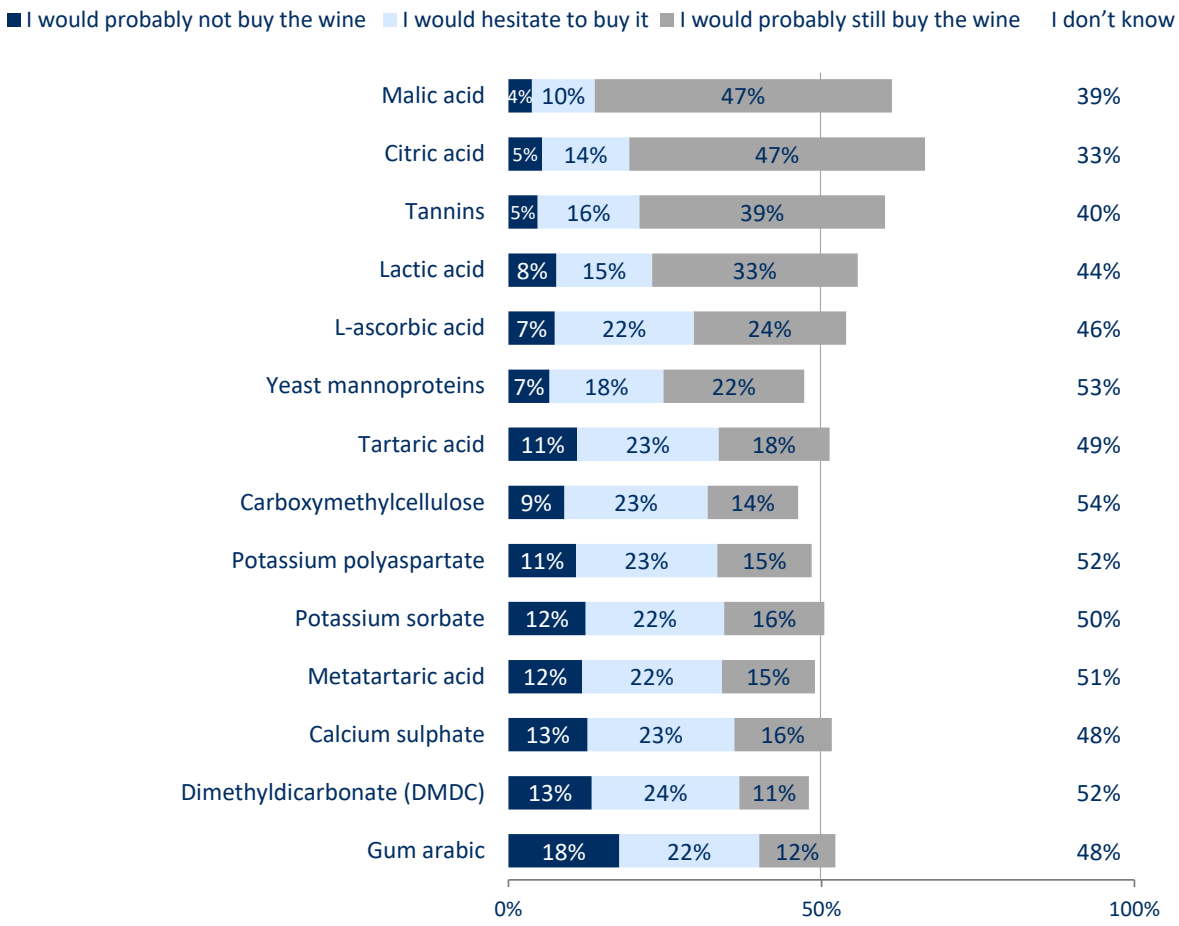
Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

ACCEPTANCE OF SPECIFIC INGREDIENTS: WITHOUT INFORMATION

Malic and citric acid are the most accepted ingredients (47% would still buy the wine vs 24% on average). Most of the other ingredients broadly yield uncertain views or hesitation (far more so than outright rejection).

Acceptance of specific wine ingredients: without information

Question: For each of these ingredients, what would your reaction be? Base: all Japanese monthly wine drinkers (randomly) assigned to the scenario ' No information' (n=505)



	Average scores
Base:	*505*
% 'Still buy'	24%
% 'Hesitate'	20%
% 'Not buy'	10%
% 'Don't know'	47%

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

ACCEPTANCE OF SPECIFIC INGREDIENTS: IMPACT OF EDUCATION

Explaining why they are used reduces rejection rates for the least accepted ingredients.

Acceptance of specific wine ingredients: impact of education

Question: For each of these ingredients, what would your reaction be?
Base: all Japanese monthly wine drinkers (randomly) assigned to the scenario ' Short explanation' (n=495)

	% I would probably not buy the wine	% I would hesitate to buy it	% I would probably still buy the wine	% I don't know / not sure
Malic acid	ns	ns	ns	ns
Citric acid	ns	ns	ns	ns
Tannins	ns	ns	ns	ns
Lactic acid	ns	ns	ns	ns
L-ascorbic acid	ns	ns	ns	ns
Yeast mannoproteins	ns	ns	ns	ns
Tartaric acid	-5 pts	-5 pts	ns	ns
Carboxymethylcellulose	ns	ns	ns	ns
Potassium polyaspartate	ns	ns	ns	ns
Potassium sorbate	-4 pts	ns	+6 pts	ns
Metatartaric acid	-5 pts	ns	ns	ns
Calcium sulphate	-6 pts	ns	ns	+7 pts
Dimethyldicarbonate (DMDC)	-5 pts	ns	+7 pts	ns
Gum arabic	-7 pts	ns	ns	+7 pts

Without information → With information

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)
- Tartaric acid
- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate

Ingredients used to better preserve the wine:

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)

Ingredients used to better maintain the quality of the wine (stabilise it and/or regulate its level of acidity):

- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate
- Tartaric acid

ns = not significant

Red / Blue : significantly higher / lower than 'Without information' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

CONCLUSIONS: KEY TAKEAWAYS

- Most consumers don't reject the idea of the use of additives in the winemaking process.

  Most either recognise or are neutral regarding the presence of additives in wines. Similarly, they will mostly be neutral or (less often) agree regarding the usefulness of additives in the winemaking process.

- 37% believe that good quality wines don't need additives and 38% express concerns regarding their impact on health. Providing reassurance on both counts are points to consider.

- The disclosure of ingredients of a known and trusted wine yields more uncertainty than rejection.

  12% of consumers state they would stop buying the wine and **44% would hesitate or be unsure**. The disclosure yields a decrease in imagery perceptions. These negative impacts are lower for a short list and higher for both 'contains sulfites' and a long list.

- The disclosure of the full list of ingredients decreases consideration to buy an unknown red wine.

  Shifting from 'contains sulfites' to the full list of ingredients yields consumers to be more neutral (and less positive) with the wine. The negative impact is higher for a long list of ingredients: it drives down imagery to a larger extent than a short list.

- A **short** list doesn't seem to have much impact on the willingness to trial an unknown white wine.

  However, findings suggest that shifting from 'contains sulfites' to a **long list** of ingredients decreases it. And it significantly drives imagery down on two counts: the brand is less likely to be perceived as delivering a good taste or as being enjoyable for everyday drinking.

- Regarding specific ingredients, **malic** and **citric acids** are the most accepted. For other ingredients, the most common reaction is uncertainty (≈50%) or hesitation (≈ 20%). Education (i.e. explaining why ingredients are used) significantly reduces rejection rates for the least accepted ingredients.

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices
   - New wine: back labels shown to respondents
   - New wine: average findings (white + white wine merged)

APPENDIX : METHODOLOGY – TESTED BACK LABELS (STILL WINE)

Red wine back label:







White wine back label:







Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

APPENDIX : METHODOLOGY – TESTED BACK LABELS (SPARKLING WINE)

Sparkling wine back label:







Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices
   - Trialling a new wine: back labels shown to respondents
   - Trialling a new wine: average findings (white + red wine merged)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

Still (white + red) wine back label: impact of ingredients labelling on consideration to buy

Question : To what extent would you consider buying this wine?
Base: all Japanese monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***333***	*330*	*338*
I would consider / strongly consider buying it	**46%**	39%	35%
I may consider buying it	**32%**	40%	40%
I would probably not / definitely not consider buying it	**15%**	13%	17%
I don't know / not sure	**7%**	9%	8%
Total	**100%**	100%	100%

Net impact (% would buy - % would not consider buying)	**31%**	**26%**	**18%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (2/3)

Still (white + red) wine back label : impact of ingredients labelling on price perceptions

Question : This wine is probably…
Base: all Japanese monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***333***	*330*	*338*
Very high-end	**1%**	1%	1%
High end	**20%**	21%	14%
Average	**55%**	53%	58%
Low end	**14%**	11%	13%
Very low-end	**1%**	2%	2%
I don't know / not sure	**8%**	13%	11%
Total	**100%**	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (1/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% appropriate / very appropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Japanese monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% Appropriate / Very appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base :	***333***	*330*	*338*
It probably tastes good	**69%**	64%	56%
A wine I would probably enjoy for everyday drinking	**63%**	56%	48%
A wine that seems to be produced with care	**57%**	55%	50%
It probably is of high quality	**48%**	49%	43%
A wine I would probably be proud to serve to friends	**41%**	38%	32%
A wine that is probably produced in an environmentally friendly way	**38%**	41%	38%
It inspires confidence	**34%**	34%	29%
It probably is an ordinary wine	**30%**	34%	33%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (2/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% neither appropriate not inappropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Japanese monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% Neither appropriate nor inappropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base :	***333***	*330*	*338*
It probably tastes good	**22%**	28%	32%
A wine I would probably enjoy for everyday drinking	**28%**	34%	36%
A wine that seems to be produced with care	**33%**	34%	36%
It probably is of high quality	**38%**	38%	37%
A wine I would probably be proud to serve to friends	**44%**	47%	47%
A wine that is probably produced in an environmentally friendly way	**47%**	43%	43%
It inspires confidence	**47%**	48%	48%
It probably is an ordinary wine	**45%**	45%	45%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (3/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% not / not at all appropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Japanese monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% Not appropriate / Not at all appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base :	***333***	*330*	*338*
It probably tastes good	**4%**	4%	4%
A wine I would probably enjoy for everyday drinking	**5%**	4%	7%
A wine that seems to be produced with care	**4%**	5%	6%
It probably is of high quality	**8%**	7%	11%
A wine I would probably be proud to serve to friends	**9%**	7%	11%
A wine that is probably produced in an environmentally friendly way	**6%**	6%	8%
It inspires confidence	**11%**	11%	13%
It probably is an ordinary wine	**19%**	16%	13%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (4/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% I don't know / not sure)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Japanese monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% I don't know / not sure	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base :	***333***	*330*	*338*
It probably tastes good	**5%**	4%	9%
A wine I would probably enjoy for everyday drinking	**5%**	6%	9%
A wine that seems to be produced with care	**6%**	6%	9%
It probably is of high quality	**6%**	6%	10%
A wine I would probably be proud to serve to friends	**7%**	8%	10%
A wine that is probably produced in an environmentally friendly way	**9%**	10%	11%
It inspires confidence	**7%**	8%	11%
It probably is an ordinary wine	**7%**	6%	9%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (5/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Japanese monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

Net impact (positive - negative)	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*333*	*330*	*338*
It probably tastes good	65%	60%	51%
A wine I would probably enjoy for everyday drinking	57%	52%	40%
A wine that seems to be produced with care	53%	51%	44%
It probably is of high quality	40%	41%	32%
A wine I would probably be proud to serve to friends	32%	30%	21%
A wine that is probably produced in an environmentally friendly way	31%	35%	30%
It inspires confidence	23%	22%	17%
It probably is an ordinary wine	12%	18%	21%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Japan (n=1,000 wine drinkers)

Connecting wine businesses with knowledge and insights globally

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WINE INTELLIGENCE

Wine consumers' perceptions and reactions towards labelling ingredients on wine bottles

Report: Russian market, April 2021

OEnoppia

INTRODUCTION

Study findings are reported through 11 reports:

1. USA
2. Australia
3. Japan
4. France
5. Germany
6. Italy
7. Russia — This report
8. Spain
9. Sweden
10. UK
11. Multi-market management summary

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

RESEARCH OBJECTIVES

The overall objective of this study is to assess consumers' perceptions, attitudes and opinions of wine ingredients labelling

Four specific objectives have been assigned to this study:

1. Assess consumers' perceptions and knowledge of winemaking practices.

2. Asses the impact of labelling ingredients on purchase consideration and imagery of a tried and liked wine (impact on brand loyalty) and on an unknown wine (impact on new consumer acquisition).

3. Assess the impact of two levels of information: a short vs long list of ingredients.

4. Assess the level of consumer acceptance for specific ingredients.

METHODOLOGY: DATA COLLECTION

Consumer survey: data gathered via the Vinitrac® Russia omnibus survey platform:

- **Scope:** all imported wine drinkers, aged between 18 and 64 years old, living in Moscow and St Petersburg, who drink wine at least twice a year.
- **Sampling:** quota-based sample (age, gender and region of residence).
- **Data collection mode:** online.
- **Dates of data collection:** from 23th February to 3rd March 2021.
- **Sample size** (after cleaning and weighting procedures): 1,022 respondents.
- Sample profile is shown in the table:

Gender	Male	44%
	Female	56%
	Total	100%
Age	18-24	8%
	25-34	32%
	35-44	23%
	45-54	21%
	55-64	17%
	Total	100%
Region of residence	Moscow	71%
	St. Petersburg	29%
	Total	100%

STUDY CONTEXT: MARKET SIZE

The survey is representative of the 7.5 million adults (18-64 years old) living in Moscow and St Petersburg who drink imported wine at least twice a year.

	Adult population (millions)	% drink still wine*	Survey is representative of … **million wine drinkers**	
USA	241	32%	77	
Australia	18.2	50%	9.2	
Japan	105.1	22%	23.1	
France	51	75%	38	
Germany	66.2	42%	27.5	
Italy	49.7	62%	31	
Russia	16.3	46%	7.5	→ This report
Spain	38	50%	18.9	
Sweden	7.9	55%	4.3	
UK	52.4	49%	25.9	
Total	**646**	**41%**	**262**	

*% drink red, white or rosé wine at least once a month, except in two markets:

- France: all wine drinkers who live in France (exc. Corsica and overseas territories)
- Russia: all imported wine drinkers (at least twice per year), aged between 18 and 64 years old, living in Moscow and St Petersburg

[1] Source : national statistics

[2] Source : Wine Intelligence, calibration surveys

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

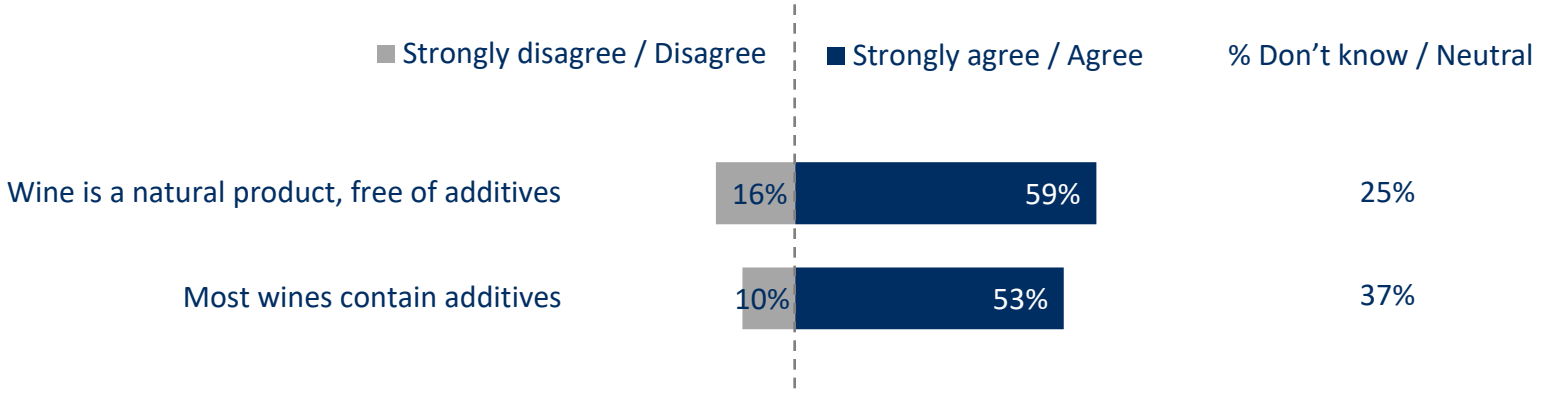
WINEMAKING PERCEPTIONS AND KNOWLEDGE (1/3)

Russian consumers express ambivalent views : 59% of them perceive wine as being free of additives while 53% agree that most wines contain additives.

Winemaking process perceptions and knowledge (1/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all imported wine drinkers (n=1,022)

Presence of additives in wine



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

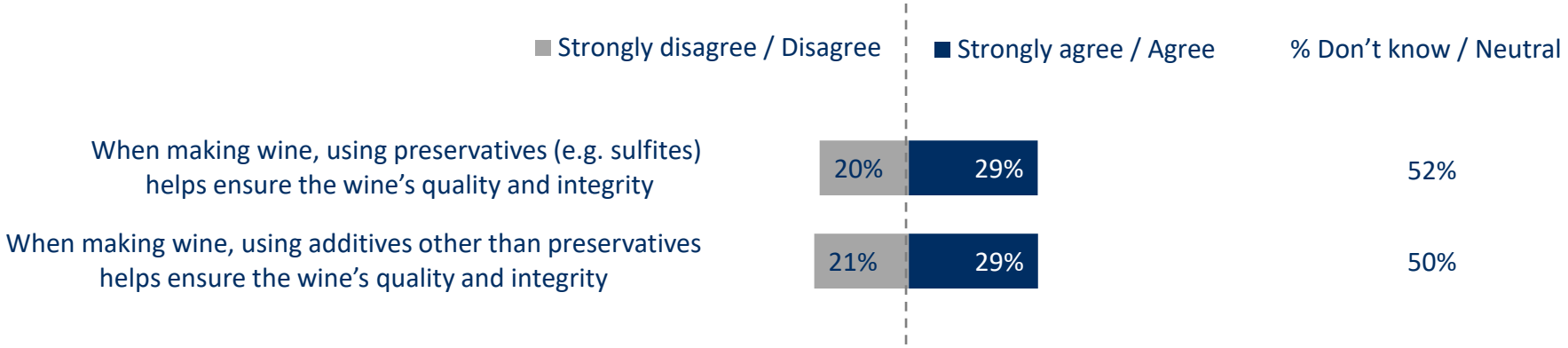
WINEMAKING PERCEPTIONS AND KNOWLEDGE (2/3)

Regarding the usefulness of using additives in wine, half of all Russian wine drinker surveyed are unsure or have no opinion.

Winemaking process perceptions and knowledge (2/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all imported wine drinkers (n=1,022)

Usefulness of additives in winemaking process



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

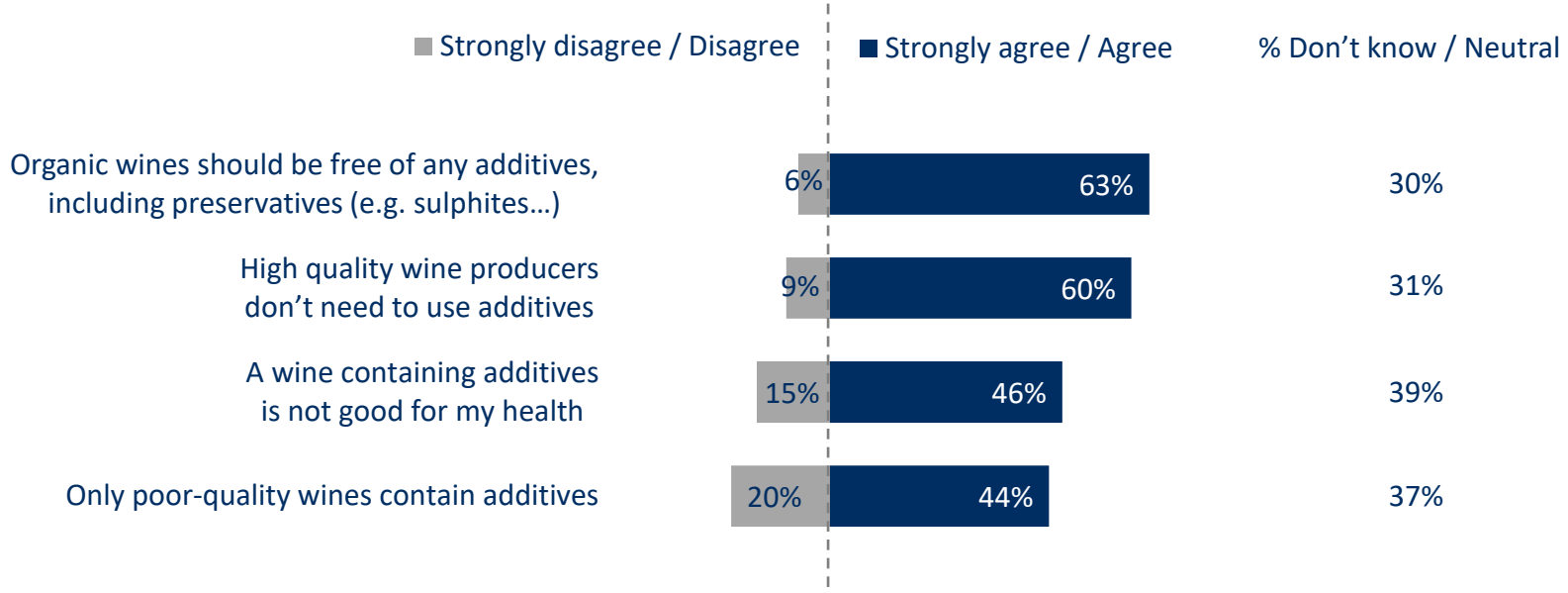
WINEMAKING PERCEPTIONS AND KNOWLEDGE (3/3)

The most common view is that there is a correlation between the presence of additives in wines and their level of quality. 60% say that good quality wines don't need additives and 44% agree that only poor quality wines contain some.

Winemaking process perceptions and knowledge (3/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all imported wine drinkers (n=1,022)

Wine additives: quality and health



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY: IMPACT OF WINE INGREDIENTS LABELLING ON A TRIED AND LIKED WINE – QUESTIONNAIRE STRUCTURE

All respondents

Respondents were asked to think about a wine they regularly buy and love drinking.

- Q2: favourite wine style (red wine / white wine / rosé wine)
- Q3: favourite wine perceptions / imagery (10 statements, using a 1-5 scale)

Respondents are informed that the back label exhibits the wine's ingredients.
Each respondent has been randomly assigned to one of the three following scenarios:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients:
"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients:
"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

- Q4: changes in opinion (1 to 5 scale)
- Q5: changes in intent to buy (1 to 5 scale)
- Q6: changes in imagery (10 statements, 1 to 5 scales)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON OVERALL OPINION

On average, the disclosure of ingredients will drive down the opinion amongst 23% of consumers. This negative impact is higher for 'contains sulfites' (29% form a lower opinion) and is lowest for a short list of ingredients (17% form a lower opinion).

Known and liked wine: impact of wine ingredients labelling on overall opinion

Question: Now knowing the ingredients it contains, does it change your opinion about this wine?
Base: all imported wine drinkers (randomly) assigned to one of the three scenarios (n≈340 per scenario)

	Average across the three lists	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***1,022***	*341*	*342*	*338*
No, it doesn't change my opinion at all	**11%**	10%	14%	9%
No, it doesn't change my opinion much	**23%**	19%	28%	22%
It may change my opinion, I am not sure	**43%**	42%	42%	43%
Yes, it gives me a lower opinion of it	**12%**	16%	8%	14%
Yes, it gives me a rather poor opinion of it	**11%**	13%	9%	11%
Total	**100%**	100%	100%	100%

% lower / rather poor opinion	**23%**	**29%**	**16%**	**25%**

Red / Blue : significantly higher / lower than 'Average across the 3 lists' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON INTENT TO BUY

On average, the disclosure of the ingredients of a favourite wine would yield 22% of consumers to be unwilling to buy it again and 24% would hesitate or be unsure.

Interestingly, a **short** list of ingredients yields the lowest negative impact and highest consideration to buy.

Known and liked wine: impact of wine ingredients labelling on intent to buy

Question: And how likely would you be to repurchase this wine in the future?
Base: all imported wine drinkers (randomly) assigned to one of the three scenarios (n≈340 per scenario)

	Average across the three lists	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***1,022***	*341*	*342*	*338*
I would definitely buy it again	**26%**	22%	34%	22%
I would probably buy it again	**28%**	26%	31%	27%
I would hesitate to buy it again	**20%**	25%	14%	22%
I would probably not buy it again	**13%**	14%	9%	17%
I would definitely not buy it again	**8%**	8%	7%	9%
I don't know / not sure	**4%**	5%	5%	4%
Total	**100%**	100%	100%	100%

% probably not buy / definitely not buy again	**22%**	**22%**	**17%**	**26%**

Red / Blue : significantly higher / lower than 'Average across the 3 lists' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON IMAGERY

Disclosing the list of ingredients on the back label drives imagery perceptions down. The negative impact is lowest with a short list of ingredients.

Known and liked wine: impact of wine ingredients labelling on imagery

Question: Now knowing the ingredients it contains, please indicate the extent to which you feel that each of the following statements are appropriate to describe your FAVOURITE wine on a 1 to 5 scale where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all imported wine drinkers (randomly) assigned to one of the three scenarios (n≈340 per scenario)

% Appropriate / Very appropriate	**Known and liked wine**	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***1,022***	*341*	*342*	*338*
A taste I like	**94%**	85%	88%	83%
Very good quality	**88%**	69%	74%	61%
Good value for money	**88%**	74%	80%	73%
A wine that inspires confidence	**84%**	67%	71%	62%
A wine I am never disappointed with	**83%**	73%	75%	65%
Made by a producer that I trust	**78%**	69%	71%	64%
A wine that I am proud to serve to my friends/family	**75%**	61%	69%	59%
A wine produced with care	**60%**	48%	57%	48%
A wine produced in an environmentally friendly way	**59%**	49%	53%	39%
A wine I enjoy for everyday drinking	**57%**	52%	59%	47%

Initial positive views tend to shift towards both neutral and negative views.

Red / Blue : significantly higher / lower than 'Known and liked wine' (confidence interval: 95%)

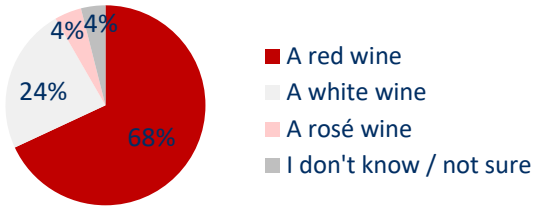
Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

KNOWN AND LIKED WINE: FINDINGS SUMMARY BY WINE TYPE PREFERENCE

The negative impact of ingredients labelling on overall opinion tends to be higher for red wines than for white wine. However, the negative impact on consideration to buy is similar for both colours (note: sample size for rosé wines is too small to be interpreted).

Known and liked wine: by wine type

Question: Please think about your FAVOURITE wine brand or producer, i.e. a wine that you regularly buy and that you love drinking. Is this wine:
Base: all imported wine drinkers (n=1,022)



Overall opinion: % lower / rather poor opinion

	Average	Contains sulfites	Short list	Long list
Base:	***1,022***	*341*	*342*	*338*
Red	**26%**	32%	16%	30%
White	**19%**	29%	13%	15%
Rosé	**15%**	9%	25%	11%
Average all styles	**23%**	**29%**	**16%**	**25%**

Findings suggest that the negative impact of ingredients labelling is higher for red wines, especially when a long ingredients list was displayed.

Intent to buy: % probably not buy / definitely not buy again

	Average	Contains sulfites	Short list	Long list
Base:	***1,022***	*341*	*342*	*338*
Red	**22%**	23%	15%	28%
White	**23%**	25%	18%	26%
Rosé	**17%**	13%	25%	13%
Average all styles	**22%**	**22%**	**17%**	**26%**

On average, the negative impact of ingredients labelling is similar for both white and red wines.

Red / Blue : significantly higher / lower than 'Average all colours' (confidence interval: 95%) - Grey: small sample size (n<50)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine :
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY : IMPACT OF WINE INGREDIENTS LABELLING ON A NEW WINE – QUESTIONNAIRE STRUCTURE

We asked respondents to imagine they are in a shop and that they spot a wine that seems to match the type of wine they like to drink. Each respondent was randomly assigned to 1 of the 3 possible scenarios of back labels:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"



"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

Each respondent was shown either a **white** wine (≈50% of respondents) or a **red** wine (≈50% of respondents) back label.

Q7: new wine – consideration to buy (1 to 5 scale)

Q8: new wine – price range perception (scale ranging from 'very low end' to 'very high-end')

Q9: new wine – perceptions / imagery (8 statements, using a scale)

Note: back labels are shown in the appendix.

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

RED WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

Findings suggest that the shift from 'contains sulfites' to the **short** list of ingredients yields a higher likelihood of trialling a new red wine (41% positive intent vs 32%). (note: differences are not statistically significant).

Red wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this wine?
Base: all imported wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈170)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***169***	*175*	*173*
I would consider / strongly consider buying it	**32%**	41%	29%
I may consider buying it	**41%**	37%	39%
I would probably not / definitely not consider buying it	**23%**	18%	26%
I don't know / not sure	**4%**	5%	6%
Total	**100%**	100%	100%

Net (% would buy - % would not consider buying)	**9%**	**23%**	**3%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

RED WINE BACK LABEL : IMPACT OF WINE INGREDIENTS LABELLING (2/3)

Shifting from 'contains sulfites' to a short list of ingredients improves perceived value, making the wine look less 'average' and more high end.

Red wine back label: impact of ingredients labelling on price perceptions

Question: This wine is probably…
Base: all imported wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈170)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***169***	*175*	*173*
Very high-end	**2%**	6%	4%
High end	**30%**	39%	33%
Average	**51%**	38%	43%
Low end	**3%**	2%	3%
Very low-end	**2%**	1%	2%
I don't know / not sure	**13%**	14%	16%
Total	**100%**	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

RED WINE BACK LABEL : IMPACT OF WINE INGREDIENTS LABELLING (3/3)

A wine with a short list of ingredients enjoys a more favourable image than either 'contains sulfites' or a long list.

Red wine back label: impact of ingredients labelling on wine imagery

Question: Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all imported wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈170)

% Appropriate / Very appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base:	***169***	*175*	*173*
It probably tastes good	**68%**	75%	69%
It probably is an ordinary wine	**57%**	57%	54%
It probably is of high quality	**55%**	67%	58%
It inspires confidence	**53%**	59%	46%
A wine that seems to be produced with care	**42%**	41%	42%
A wine that is probably produced in an environmentally friendly way	**39%**	50%	38%
A wine I would probably be proud to serve to friends	**36%**	52%	38%
A wine I would probably enjoy for everyday drinking	**27%**	39%	31%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

The shift from 'contains sulfites' to the full list of ingredients doesn't seem to have much impact on consideration to trial a new white wine.

White wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this wine?
Base: all imported wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈170)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	*172*	*167*	*166*
I would consider / strongly consider buying it	**42%**	38%	35%
I may consider buying it	**32%**	40%	39%
I would probably not / definitely not consider buying it	**20%**	19%	21%
I don't know / not sure	**6%**	4%	5%
Total	**100%**	100%	100%
Net impact (% would buy - % would not consider buying)	**22%**	**19%**	**13%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (2/3)

A long list of wine ingredients decreases the perceived value of an unknown white wine. It is perceived as being more average (and less high end) than both of the other labelling formats.

White wine back label: impact of ingredients labelling on price perceptions

Question: This wine is probably…
Base: all imported wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈170)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***172***	*167*	*166*
Very high-end	**4%**	7%	5%
High end	**39%**	40%	26%
Average	**37%**	37%	46%
Low end	**4%**	3%	4%
Very low-end	**1%**	0%	2%
I don't know / not sure	**14%**	14%	17%
Total	**100%**	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (3/3)

A long list of ingredients yields the wine to be less likely to be associated with an environmentally friendly production process.

White wine back label: impact of ingredients labelling on wine imagery

Question: Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all imported wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈170)

% Appropriate / Very appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base:	***172***	*167*	*166*
It probably tastes good	73%	72%	68%
It probably is of high quality	68%	67%	59%
It probably is an ordinary wine	56%	52%	56%
It inspires confidence	51%	55%	49%
A wine that is probably produced in an environmentally friendly way	49%	54%	37%
A wine I would probably be proud to serve to friends	42%	49%	36%
A wine that seems to be produced with care	39%	48%	34%
A wine I would probably enjoy for everyday drinking	37%	40%	32%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY: IMPACT OF WINE INGREDIENTS LABELLING ON A NEW SPARKLING WINE – QUESTIONNAIRE STRUCTURE

Respondents were asked to imagine they are in a shop and that they spot a wine that seems to match the type of sparkling wine they like to drink. Each respondent is (randomly) shown one of the 3 possible **sparkling wine** back labels:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"



"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

- Q10: new wine – consideration to buy (1 to 5 scale)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

SPARKLING WINE: IMPACT OF INGREDIENTS LABELLING

Consumers display a strong preference for the back labels which show a short list of ingredients (41% would consider to buy vs about 30% for both of the other formats).

Sparkling wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this sparkling wine?
Base: all imported wine drinkers (randomly) assigned to one of the 3 possible sparkling wine back labels (n≈340)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***341***	*342*	*338*
I would consider / strongly consider buying it	**32%**	41%	30%
I may consider buying it	**36%**	32%	41%
I would probably not / definitely not consider buying it	**26%**	21%	24%
I don't know / not sure	**6%**	5%	5%
Total	**100%**	100%	100%

Net impact (% would consider - % would not consider)	***6%***	*20%*	*5%*

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

SPECIFIC WINE INGREDIENTS ACCEPTANCE: METHODOLOGY

We asked respondents to imagine they are in a shop and that they spot a wine that seems to match the type of wine they like to drink. Each respondent is (randomly) assigned to one of the two following scenarios:

Scenario 1 (≈50% of respondents)

Respondents are exposed to a list of ingredients with no information.

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)
- Tartaric acid
- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate

Scenario 2 (≈50% of respondents)

Respondents are exposed to the same list but with short explanations.

Ingredients used to better preserve the wine:

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)

Ingredients used to better maintain the quality of the wine (stabilise it and / or regulate its level of acidity):

- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate
- Tartaric acid

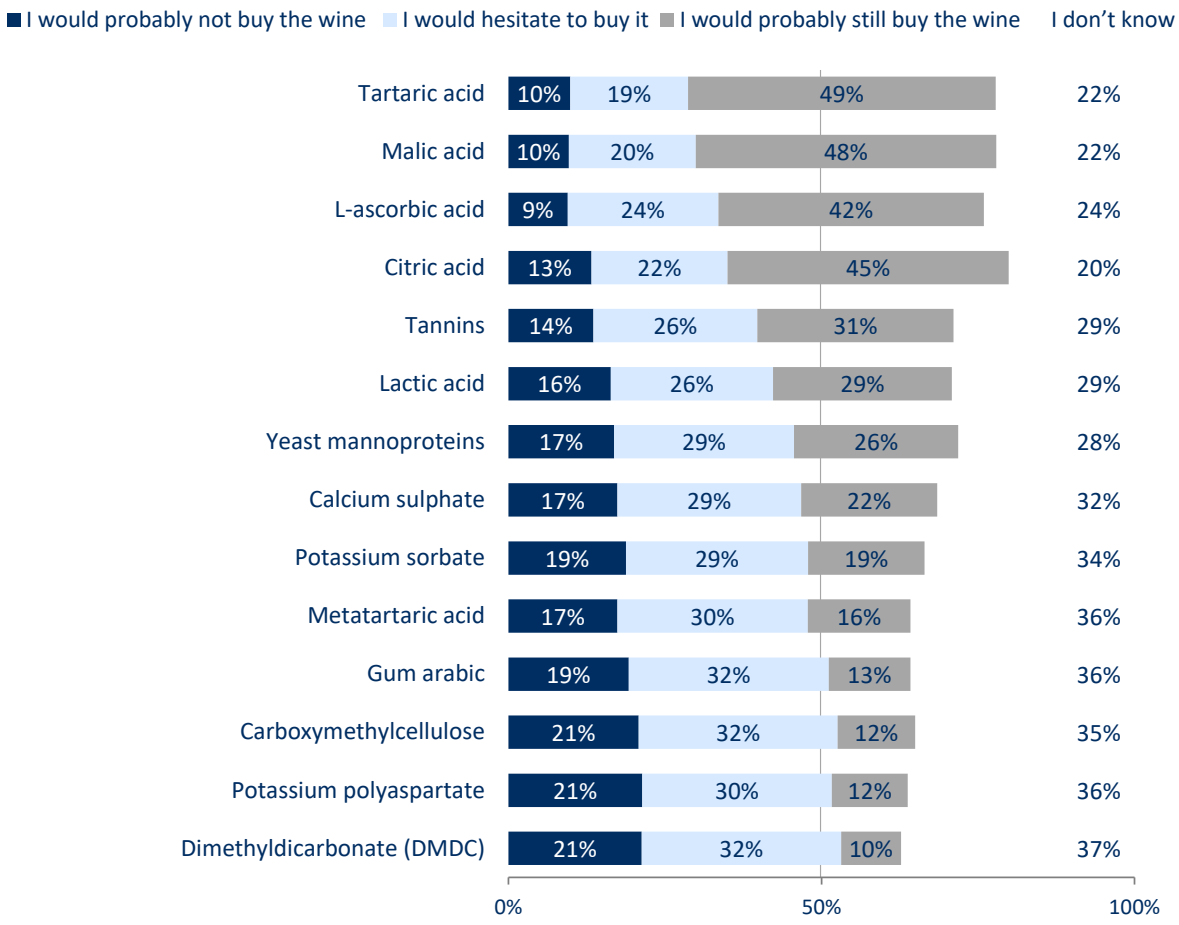
Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

ACCEPTANCE OF SPECIFIC INGREDIENTS: WITHOUT INFORMATION

Overall, the acids are the most accepted ingredients. The other ingredients broadly yield uncertain views, more so than outright rejection.

Acceptance of specific wine ingredients: without information

Question: For each of these ingredients, what would your reaction be? Base : all imported wine drinkers (randomly) assigned to the scenario ' No information' (n=529)



	Average scores
Base:	*529*
% 'Still buy'	27%
% 'Hesitate'	27%
% 'Not buy'	16%
% 'Don't know'	30%

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

ACCEPTANCE OF SPECIFIC INGREDIENTS: IMPACT OF EDUCATION

For several ingredients, explaining why they are used increases acceptance. For example, the proportion of respondents who would still buy a wine containing DMDC increases from 10% to 21% (+11 pts).

Acceptance of specific wine ingredients: impact of education

Question: For each of these ingredients, what would your reaction be?
Base: all imported wine drinkers (randomly) assigned to the scenario ' Short explanation' (n=493)

	% I would probably not buy the wine	% I would hesitate to buy it	% I would probably still buy the wine	% I don't know / not sure
Tartaric acid	ns	ns	ns	ns
Malic acid	ns	ns	+7 pts	ns
L-ascorbic acid	ns	-7 pts	+13 pts	-6 pts
Citric acid	-5 pts	ns	+12 pts	ns
Tannins	ns	ns	ns	ns
Lactic acid	ns	ns	+8 pts	ns
Yeast mannoproteins	ns	ns	ns	ns
Calcium sulphate	ns	ns	+5 pts	ns
Potassium sorbate	-5 pts	ns	+13 pts	-7 pts
Metatartaric acid	ns	ns	ns	ns
Gum arabic	ns	ns	ns	ns
Carboxymethylcellulose	ns	ns	ns	ns
Potassium polyaspartate	ns	ns	+6 pts	ns
Dimethyldicarbonate (DMDC)	ns	ns	+11 pts	-10 pts

Without information → With information

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)
- Tartaric acid
- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate

Ingredients used to better preserve the wine:
- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)

Ingredients used to better maintain the quality of the wine (stabilise it and/or regulate its level of acidity):
- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate
- Tartaric acid

ns = not significant

Red / Blue : significantly higher / lower than 'Without information' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

CONCLUSIONS: KEY TAKEAWAYS

- Consumers express ambivalent views regarding the presence and usefulness of additives in wine.

  About half recognize the presence of additives in wine though 59% think of wine as being entirely natural. About half are neutral regarding their usefulness in winemaking and only 29% perceived them as being useful.

- Furthermore, 60% believe that good quality wines don't need additives and 46% express concerns regarding their impact on health. Providing reassurance on both counts are key points to consider.

- The disclosure of ingredients of a known and trusted wine often yields uncertainty or rejection.

  22% of consumers state they would stop buying it and 24% would hesitate or be unsure. The disclosure of wine ingredients yields a decrease in imagery perceptions. A **short** list of ingredients is preferable to both 'contains sulfites' or a long list.

- A **short** list of ingredients improves perceptions of an unknown red wine.

  Shifting from 'contains sulfites' to a **short list** of ingredients tends to raise both imagery and consideration to trial the wine. A long list of ingredients obtains similar scores to 'contains sulfites'.

- A full list of ingredients doesn't seem to have much impact on the perceptions of an unknown white wine.

  Shifting from 'contains sulfites' to either a short or a long list of ingredients doesn't significantly impact consideration to buy or trust levels with the brand. However, if it's a long list, it will harm imagery (the brand is less likely to be associated as an environmentally friendly wine) and perceived value.

- Regarding specific ingredients, several **acids** are the most accepted. For other ingredients, the most common reactions are uncertainty or (less often) acceptance, far more so than outright rejection. Education (i.e. explaining why ingredients are used) helps to significantly increase acceptance levels for several ingredients.

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices
   - New wine: back labels shown to respondents
   - New wine: average findings (white + white wine merged)

APPENDIX : METHODOLOGY – TESTED BACK LABELS (STILL WINE)

Red wine back label:







White wine back label:







Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

APPENDIX : METHODOLOGY – TESTED BACK LABELS (SPARKLING WINE)

Sparkling wine back label:







Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices
   - Trialling a new wine: back labels shown to respondents
   - Trialling a new wine: average findings (white + red wine merged)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

Still (white + red) wine back label: impact of ingredients labelling on consideration to buy

Question : To what extent would you consider buying this wine?
Base: all imported wine drinkers (randomly) assigned to one of the three back labels (n≈340)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***341***	*342*	*338*
I would consider / strongly consider buying it	**37%**	39%	32%
I may consider buying it	**36%**	38%	39%
I would probably not / definitely not consider buying it	**22%**	18%	24%
I don't know / not sure	**5%**	4%	5%
Total	**100%**	100%	100%

Net impact (% would buy - % would not consider buying)	**15%**	**21%**	**8%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (2/3)

Still (white + red) wine back label : impact of ingredients labelling on price perceptions

Question : This wine is probably…
Base: all imported wine drinkers (randomly) assigned to one of the three back labels (n≈340)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***341***	*342*	*338*
Very high-end	**3%**	6%	4%
High end	**35%**	39%	29%
Average	**44%**	37%	45%
Low end	**4%**	3%	3%
Very low-end	**1%**	1%	2%
I don't know / not sure	**13%**	14%	17%
Total	**100%**	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (1/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% appropriate / very appropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all imported wine drinkers (randomly) assigned to one of the three back labels (n≈340)

% Appropriate / Very appropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*341*	*342*	*338*
It probably tastes good	70%	74%	68%
It probably is of high quality	62%	67%	58%
It probably is an ordinary wine	56%	55%	55%
It inspires confidence	52%	57%	48%
A wine that is probably produced in an environmentally friendly way	44%	52%	38%
A wine that seems to be produced with care	41%	44%	38%
A wine I would probably be proud to serve to friends	39%	51%	37%
A wine I would probably enjoy for everyday drinking	32%	39%	32%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (2/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% neither appropriate not inappropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all imported wine drinkers (randomly) assigned to one of the three back labels (n≈340)

% Neither appropriate nor inappropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*341*	*342*	*338*
It probably tastes good	19%	16%	18%
It probably is of high quality	23%	21%	25%
It probably is an ordinary wine	27%	27%	26%
It inspires confidence	32%	27%	31%
A wine that is probably produced in an environmentally friendly way	29%	31%	32%
A wine that seems to be produced with care	34%	32%	32%
A wine I would probably be proud to serve to friends	35%	28%	35%
A wine I would probably enjoy for everyday drinking	34%	30%	31%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (3/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% not / not at all appropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all imported wine drinkers (randomly) assigned to one of the three back labels (n≈340)

% Not appropriate / Not at all appropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*341*	*342*	*338*
It probably tastes good	2%	3%	3%
It probably is of high quality	5%	4%	6%
It probably is an ordinary wine	9%	11%	10%
It inspires confidence	9%	7%	10%
A wine that is probably produced in an environmentally friendly way	12%	7%	11%
A wine that seems to be produced with care	11%	10%	10%
A wine I would probably be proud to serve to friends	13%	12%	13%
A wine I would probably enjoy for everyday drinking	21%	21%	22%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (4/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% I don't know / not sure)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all imported wine drinkers (randomly) assigned to one of the three back labels (n≈340)

% I don't know / not sure	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*341*	*342*	*338*
It probably tastes good	8%	7%	10%
It probably is of high quality	10%	8%	11%
It probably is an ordinary wine	8%	8%	9%
It inspires confidence	7%	9%	12%
A wine that is probably produced in an environmentally friendly way	15%	10%	19%
A wine that seems to be produced with care	14%	14%	20%
A wine I would probably be proud to serve to friends	13%	9%	15%
A wine I would probably enjoy for everyday drinking	12%	10%	15%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (5/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all imported wine drinkers (randomly) assigned to one of the three back labels (n≈340)

Net impact (positive - negative)	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*341*	*342*	*338*
It probably tastes good	68%	70%	65%
It probably is of high quality	56%	63%	52%
It probably is an ordinary wine	46%	44%	45%
It inspires confidence	43%	50%	38%
A wine that is probably produced in an environmentally friendly way	32%	45%	27%
A wine that seems to be produced with care	29%	35%	28%
A wine I would probably be proud to serve to friends	26%	39%	24%
A wine I would probably enjoy for everyday drinking	11%	19%	10%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Russia (n=1,022 wine drinkers)

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WINE INTELLIGENCE

Wine consumers' perceptions and reactions towards labelling ingredients on wine bottles

Report: Spanish market, April 2021

OEnoppia

INTRODUCTION

Study findings are reported through 11 reports:

1. USA
2. Australia
3. Japan
4. France
5. Germany
6. Italy
7. Russia
8. Spain — This report
9. Sweden
10. UK
11. Multi-market management summary

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

RESEARCH OBJECTIVES

The overall objective of this study is to assess consumers' perceptions, attitudes and opinions of wine ingredients labelling

Four specific objectives have been assigned to this study:

1. Assess consumers' perceptions and knowledge of winemaking practices.

2. Asses the impact of labelling ingredients on purchase consideration and imagery of a tried and liked wine (impact on brand loyalty) and on an unknown wine (impact on new consumer acquisition).

3. Assess the impact of two levels of information: a short vs long list of ingredients.

4. Assess the level of consumer acceptance for specific ingredients.

METHODOLOGY: DATA COLLECTION

Consumer survey: data gathered via the Vinitrac® Spain omnibus survey platform:

- **Scope:** all wine drinkers living in Spain who drink wine at least once a month.
- **Sampling:** quota-based sample (age, gender and region of residence).
- **Data collection mode:** online.
- **Dates of data collection:** from 19th February to 6th March 2021.
- **Sample size** (after cleaning and weighting procedures): 1,002 respondents.
- Sample profile is shown in the table:

Gender	Male	46%
	Female	54%
	Total	100%
Age	18-24	3%
	25-34	11%
	35-44	17%
	45-54	19%
	55-64	19%
	65 and above	31%
	Total	100%
Region of residence	Centre	24%
	Northeast	38%
	Northwest	18%
	South	21%
	Total	100%

STUDY CONTEXT: MARKET SIZE

The survey is representative of the 18.9 million adults living in Spain who drink wine at least once a month.

	Adult population (millions)	% drink still wine*	Survey is representative of … **million wine drinkers**
USA	241	32%	77
Australia	18.2	50%	9.2
Japan	105.1	22%	23.1
France	51	75%	38
Germany	66.2	42%	27.5
Italy	49.7	62%	31
Russia	16.3	46%	7.5
Spain	38	50%	18.9
Sweden	7.9	55%	4.3
UK	52.4	49%	25.9
Total	**646**	**41%**	**262**

→ This report

*% drink red, white or rosé wine at least once a month, except in two markets:

- France: all wine drinkers who live in France (exc. Corsica and overseas territories)
- Russia: all imported wine drinkers (at least twice per year), aged between 18 and 64 years old, living in Moscow and St Petersburg

[1] Source : national statistics

[2] Source : Wine Intelligence, calibration surveys

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

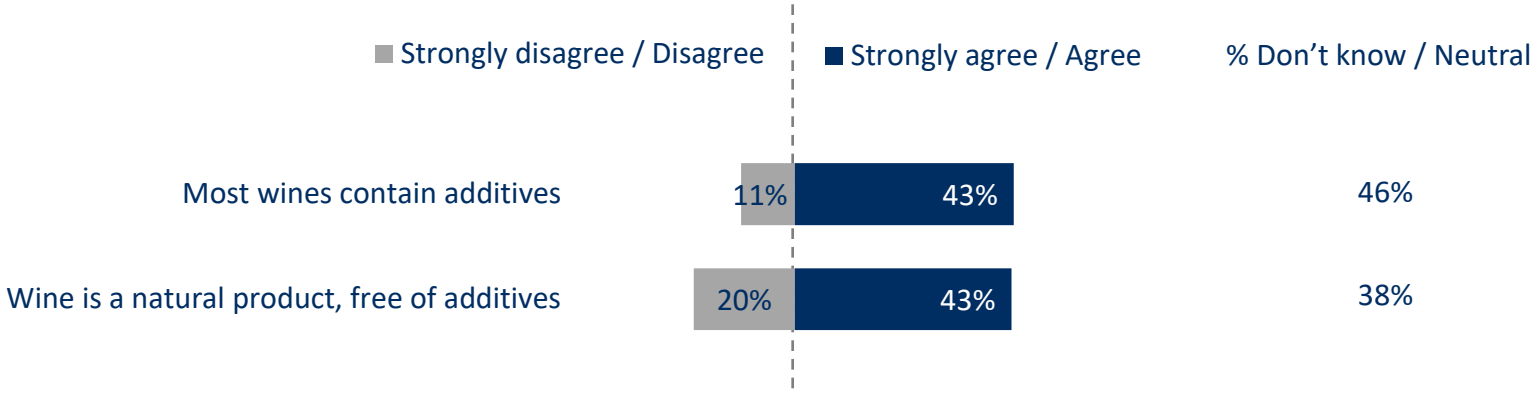
WINEMAKING PERCEPTIONS AND KNOWLEDGE (1/3)

43% of consumers are aware that wine contains additives and very few (11%) believe that it doesn't. As much consumers perceive wine as being free of additives.

Winemaking process perceptions and knowledge (1/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all Spanish monthly wine drinkers (n=1,002)

Presence of additives in wine



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

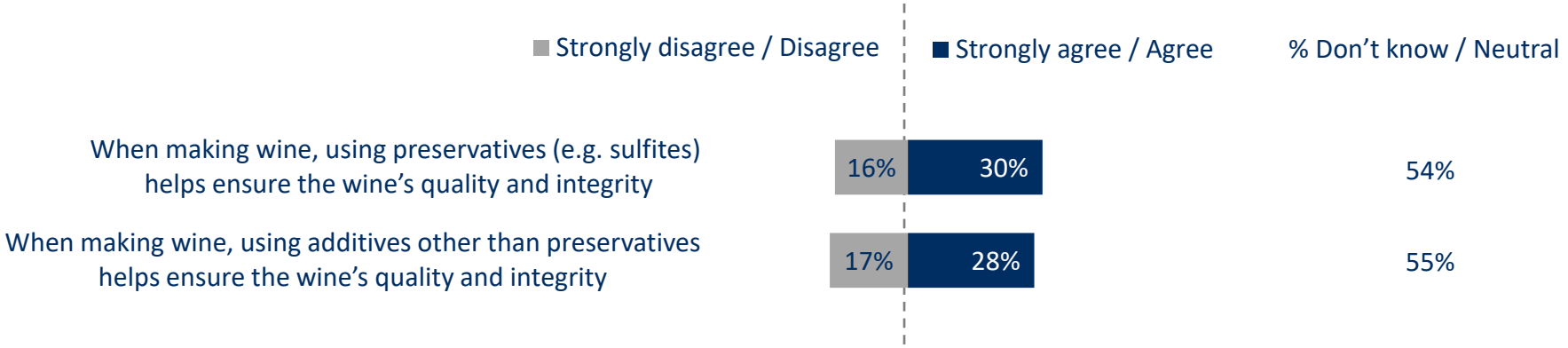
WINEMAKING PERCEPTIONS AND KNOWLEDGE (2/3)

Regarding the usefulness of using additives in wine, the most common view is neutrality. About 30% perceive additives as being helpful in the winemaking process. These findings indicate that most wine consumers are not rejecting the idea that additives may be useful in the winemaking process.

Winemaking process perceptions and knowledge (2/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all Spanish monthly wine drinkers (n=1,002)

Usefulness of additives in winemaking process



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

WINEMAKING PERCEPTIONS AND KNOWLEDGE (3/3)

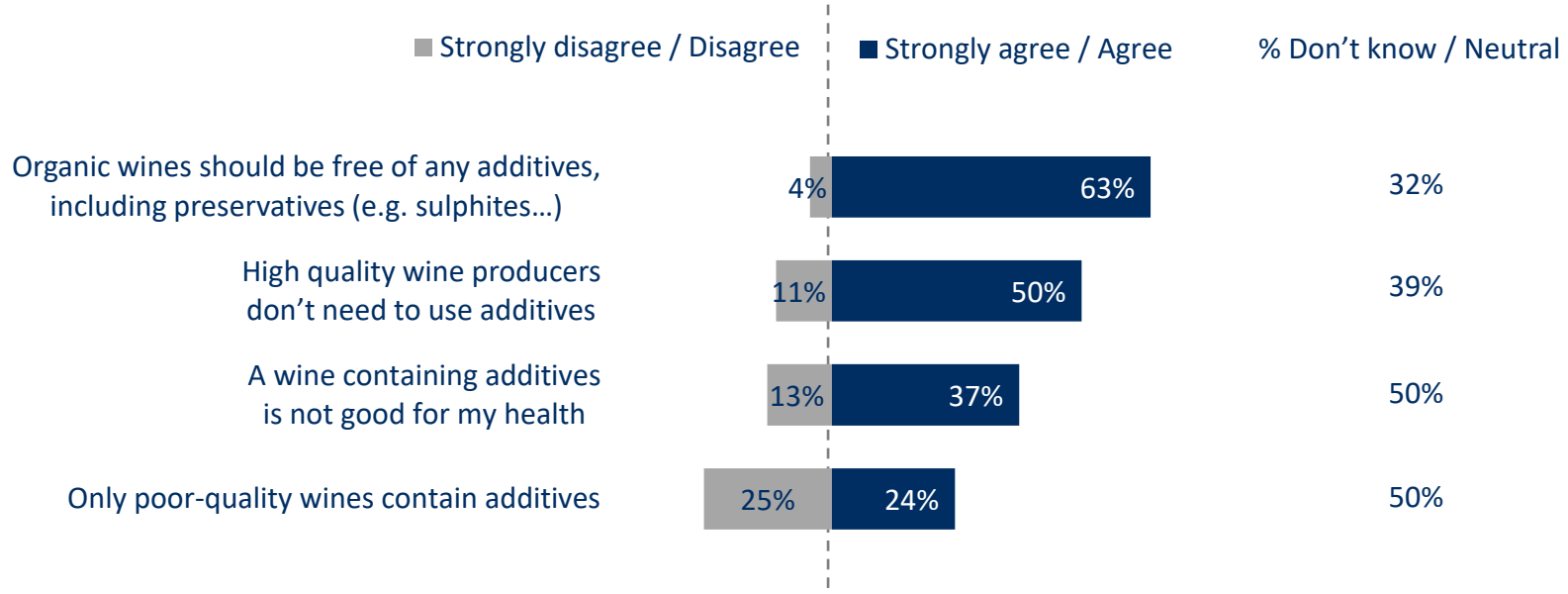
Excluding organic wines, 50% of consumers believe that high quality wines don't need to use additives. And only 24% believe that only poor quality wines contain additives. This suggests that most consumers are either neutral or accepting of the idea of the presence of additives in at least low to mid quality wines.

It's noteworthy that 37% have concerns about the impact of additives on their health.

Winemaking process perceptions and knowledge (3/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all Spanish monthly wine drinkers (n=1,002)

Wine additives: quality and health



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY: IMPACT OF WINE INGREDIENTS LABELLING ON A TRIED AND LIKED WINE – QUESTIONNAIRE STRUCTURE

All respondents

Respondents were asked to think about a wine they regularly buy and love drinking.

- Q2: favourite wine style (red wine / white wine / rosé wine)
- Q3: favourite wine perceptions / imagery (10 statements, using a 1-5 scale)

Respondents are informed that the back label exhibits the wine's ingredients.
Each respondent has been randomly assigned to one of the three following scenarios:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients:
"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients:
"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

- Q4: changes in opinion (1 to 5 scale)
- Q5: changes in intent to buy (1 to 5 scale)
- Q6: changes in imagery (10 statements, 1 to 5 scales)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON OVERALL OPINION

On average, the disclosure of ingredients will drive down the opinion amongst 9% of consumers. This negative impact is reduced by half for a short list of ingredients (and rate of acceptance is higher, at 25%).

Known and liked wine: impact of wine ingredients labelling on overall opinion

Question: Now knowing the ingredients it contains, does it change your opinion about this wine?
Base: all Spanish monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈330 per scenario)

	Average across the three lists	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***1,002***	*331*	*342*	*330*
No, it doesn't change my opinion at all	**19%**	15%	25%	18%
No, it doesn't change my opinion much	**48%**	49%	52%	43%
It may change my opinion, I am not sure	**24%**	26%	18%	28%
Yes, it gives me a lower opinion of it	**6%**	8%	3%	6%
Yes, it gives me a rather poor opinion of it	**3%**	2%	1%	6%
Total	**100%**	100%	100%	100%

% lower / rather poor opinion	**9%**	**10%**	**5%**	**12%**

Red / Blue : significantly higher / lower than 'Average across the 3 lists' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON INTENT TO BUY

On average, the disclosure of ingredients of a favourite wine would yield 8% of consumers to be unwilling to buy it again and 18% would hesitate or be unsure.

As for general opinion (see previous slide), acceptance is higher for a short list of ingredients.

Known and liked wine: impact of wine ingredients labelling on intent to buy

Question: And how likely would you be to repurchase this wine in the future?
Base: all Spanish monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈330 per scenario)

	Average across the three lists	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***1,002***	*331*	*342*	*330*
I would definitely buy it again	**41%**	39%	48%	37%
I would probably buy it again	**32%**	29%	32%	34%
I would hesitate to buy it again	**16%**	21%	11%	17%
I would probably not buy it again	**3%**	4%	2%	4%
I would definitely not buy it again	**4%**	5%	4%	5%
I don't know / not sure	**2%**	2%	3%	2%
Total	**100%**	100%	100%	100%

% probably not buy / definitely not buy again	**8%**	**8%**	**6%**	**9%**

Red / Blue : significantly higher / lower than 'Average across the 3 lists' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON IMAGERY

Disclosing a long list of ingredients on the back label drives imagery perceptions down. We also find a negative impact of 'contains sulfites' only on environmental perceptions.

Known and liked wine: impact of wine ingredients labelling on imagery

Question: Now knowing the ingredients it contains, please indicate the extent to which you feel that each of the following statements are appropriate to describe your FAVOURITE wine on a 1 to 5 scale where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Spanish monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈330 per scenario)

% Appropriate / Very appropriate	Known and liked wine	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	*1,002*	*331*	*342*	*330*
A taste I like	93%	92%	92%	86%
Very good quality	90%	86%	87%	79%
A wine I am never disappointed with	89%	85%	88%	79%
Good value for money	87%	86%	87%	80%
A wine that inspires confidence	84%	82%	84%	75%
Made by a producer that I trust	80%	79%	82%	76%
A wine that I am proud to serve to my friends/family	80%	77%	78%	72%
A wine produced with care	79%	74%	77%	74%
A wine I enjoy for everyday drinking	68%	69%	74%	67%
A wine produced in an environmentally friendly way	65%	59%	64%	60%

Initial positive views shifting towards:

With "contains sulfites" or the "short list", views tend to mostly shift to neutral positions, less so to negatives ones.

With the "long list", positive views shift almost evenly towards neutral and negative views. Which means that the negative impact is greater with the long list than with the short.

Red / Blue : significantly higher / lower than 'Known and liked wine' (confidence interval: 95%)

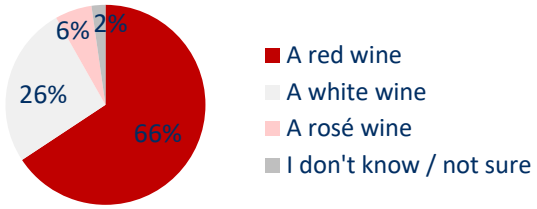
Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

KNOWN AND LIKED WINE: FINDINGS SUMMARY BY WINE TYPE PREFERENCE

The negative impact of a short list of ingredients is almost nil for white wines. However, 'contains sulfites' or a long list of ingredients impacts white and red wines to a similar degree.

Known and like wine: by wine type

Question: Please think about your FAVOURITE wine brand or producer, i.e. a wine that you regularly buy and that you love drinking. Is this wine:
Base: all Spanish monthly wine drinkers (n=1,002)



Overall opinion: % lower / rather poor opinion

	Average	Contains sulfites	Short list	Long list
Base:	***1,002***	*331*	*342*	*330*
Red	**10%**	11%	6%	12%
White	**7%**	9%	2%	10%
Rosé	**12%**	11%	5%	25%
Average all styles	**9%**	**10%**	**5%**	**12%**

Findings suggest (diff. not statistically significant) that the negative impact of ingredients labelling is lower for white wines.

Intent to buy: % probably not buy / definitely not buy again

	Average	Contains sulfites	Short list	Long list
Base:	***1,002***	*331*	*342*	*330*
Red	**7%**	7%	7%	9%
White	**7%**	9%	2%	9%
Rosé	**17%**	18%	16%	18%
Average all styles	**8%**	**8%**	**6%**	**9%**

Findings suggest (diff. not statistically significant) that the negative impact of ingredients labelling is lower for white wines when using a short list of ingredients.

Red / Blue : significantly higher / lower than 'Average all colours' (confidence interval: 95%) - Grey: small sample size (n<50)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine :
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY : IMPACT OF WINE INGREDIENTS LABELLING ON A NEW WINE – QUESTIONNAIRE STRUCTURE

We asked respondents to imagine they are in a shop and that they spot a wine that seems to match the type of wine they like to drink. Each respondent was randomly assigned to 1 of the 3 possible scenarios of back labels:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"



"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

Each respondent was shown either a **white** wine (≈50% of respondents) or a **red** wine (≈50% of respondents) back label.

Q7: new wine – consideration to buy (1 to 5 scale)

Q8: new wine – price range perception (scale ranging from 'very low end' to 'very high-end')

Q9: new wine – perceptions / imagery (8 statements, using a scale)

Note: back labels are shown in the appendix.

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

RED WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

The shift from 'contains sulfites' to the full list of ingredients yields a higher likelihood of trialling a new wine (59% and 53% positive intent vs 39%).

Consumers prefer a **short list** of ingredients.

Red wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this wine?
Base: all Spanish monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***158***	*165*	*163*
I would consider / strongly consider buying it	**39%**	59%	53%
I may consider buying it	**42%**	29%	35%
I would probably not / definitely not consider buying it	**14%**	11%	9%
I don't know / not sure	**5%**	1%	2%
Total	**100%**	100%	100%

Net (% would buy - % would not consider buying)	**25%**	**48%**	**43%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

RED WINE BACK LABEL : IMPACT OF WINE INGREDIENTS LABELLING (2/3)

The format of the wine ingredients list doesn't seem to have much impact on the perceived price of an unknown red wine.

Red wine back label: impact of ingredients labelling on price perceptions

Question: This wine is probably…
Base: all Spanish monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***158***	*165*	*163*
Very high-end	**0%**	2%	2%
High end	**18%**	20%	19%
Average	**55%**	63%	62%
Low end	**15%**	8%	11%
Very low-end	**3%**	0%	1%
I don't know / not sure	**9%**	7%	5%
Total	**100%**	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

RED WINE BACK LABEL : IMPACT OF WINE INGREDIENTS LABELLING (3/3)

A wine with a short list of ingredients inspires more confidence than 'contains sulfites' only. Also, findings suggest that shifting from 'contains sulfites' to the full list of ingredients may yield consumers to be more likely to perceive the wine as being of high quality.

Red wine back label: impact of ingredients labelling on wine imagery

Question: Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Spanish monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈160)

% Appropriate / Very appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base:	***158***	*165*	*163*
It probably tastes good	**74%**	74%	71%
A wine that seems to be produced with care	**64%**	64%	63%
A wine I would probably enjoy for everyday drinking	**58%**	61%	63%
It inspires confidence	**56%**	69%	64%
A wine that is probably produced in an environmentally friendly way	**56%**	53%	57%
A wine I would probably be proud to serve to friends	**52%**	57%	55%
It probably is an ordinary wine	**42%**	31%	45%
It probably is of high quality	**41%**	53%	50%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

The shift from 'contains sulfites' to a long list of ingredients significantly decreases the willingness to trial a new wine (52% positive intent vs 64%). However, this is not the case with a short list.

White wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this wine?
Base: all Spanish monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***172***	*177*	*167*
I would consider / strongly consider buying it	**64%**	61%	52%
I may consider buying it	**26%**	30%	31%
I would probably not / definitely not consider buying it	**8%**	7%	11%
I don't know / not sure	**2%**	2%	6%
Total	**100%**	100%	100%

Net impact (% would buy - % would not consider buying)	**56%**	**54%**	**41%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (2/3)

The format of the wine ingredients list doesn't significantly impact the perceived price of an unknown white wine.

White wine back label: impact of ingredients labelling on price perceptions

Question: This wine is probably…
Base: all Spanish monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***172***	*177*	*167*
Very high-end	**2%**	5%	3%
High end	**33%**	32%	28%
Average	**55%**	54%	50%
Low end	**3%**	4%	6%
Very low-end	**0%**	0%	1%
I don't know / not sure	**6%**	5%	12%
Total	**100%**	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (3/3)

Consumers perceive few differences between the three lists. However, a wine with a short list of ingredients is more likely to be perceived as environmentally friendly or as a wine one would enjoy for everyday drinking.

White wine back label: impact of ingredients labelling on wine imagery

Question: Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Spanish monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈160)

% Appropriate / Very appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base:	***172***	*177*	*167*
It probably tastes good	**81%**	84%	77%
It inspires confidence	**68%**	73%	67%
A wine I would probably be proud to serve to friends	**67%**	73%	62%
A wine that seems to be produced with care	**64%**	71%	60%
It probably is of high quality	**59%**	62%	54%
A wine that is probably produced in an environmentally friendly way	**53%**	65%	55%
A wine I would probably enjoy for everyday drinking	**49%**	60%	51%
It probably is an ordinary wine	**29%**	35%	36%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY: IMPACT OF WINE INGREDIENTS LABELLING ON A NEW SPARKLING WINE – QUESTIONNAIRE STRUCTURE

Respondents were asked to imagine they are in a shop and that they spot a wine that seems to match the type of sparkling wine they like to drink. Each respondent is (randomly) shown one of the 3 possible **sparkling wine** back labels:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"



"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

- Q10: new wine – consideration to buy (1 to 5 scale)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

SPARKLING WINE: IMPACT OF INGREDIENTS LABELLING

Shifting from 'contains sulfites' to the full list of ingredients improves consideration to buy (consumers tend to be less negative about the wine and more neutral).

This impact is highest for a short list.

Sparkling wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this sparkling wine?
Base: all Spanish monthly wine drinkers (randomly) assigned to one of the 3 possible sparkling wine back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	*331*	*342*	*330*
I would consider / strongly consider buying it	37%	38%	33%
I may consider buying it	26%	37%	35%
I would probably not / definitely not consider buying it	32%	22%	26%
I don't know / not sure	5%	4%	6%
Total	100%	100%	100%
Net impact (% consider - % do not consider)	*5%*	*16%*	*6%*

Rouge / Bleu : significativement supérieur / inférieur à 'Contient des sulfites' (indice de confiance : 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

SPECIFIC WINE INGREDIENTS ACCEPTANCE: METHODOLOGY

We asked respondents to imagine they are in a shop and that they spot a wine that seems to match the type of wine they like to drink. Each respondent is (randomly) assigned to one of the two following scenarios:

Scenario 1 (≈50% of respondents)

Respondents are exposed to a list of ingredients, with no information.

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)
- Tartaric acid
- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate

Scenario 2 (≈50% of respondents)

Respondents are exposed to the same list but with short explanations.

Ingredients used to better preserve the wine:

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)

Ingredients used to better maintain the quality of the wine (stabilise it and / or regulate its level of acidity):

- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate
- Tartaric acid

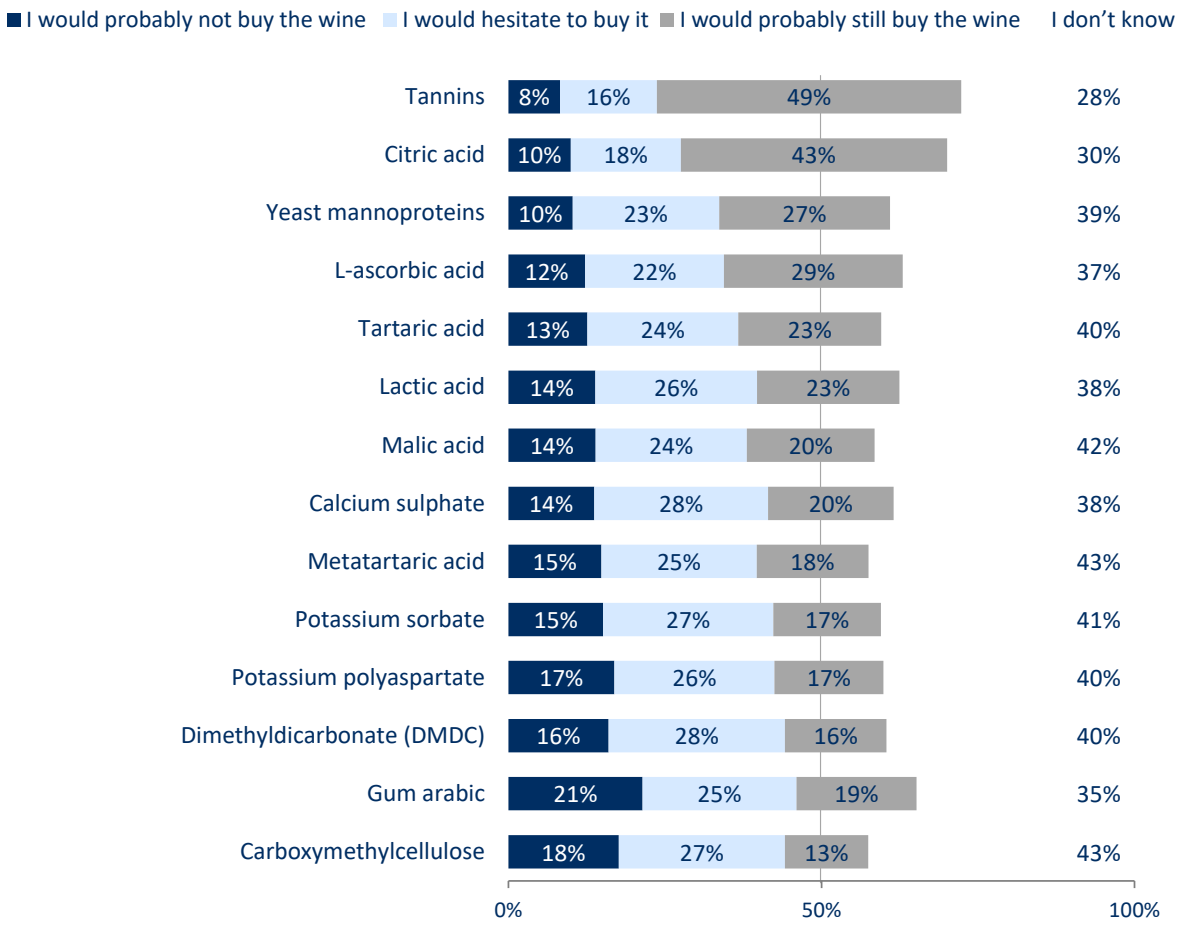
Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

ACCEPTANCE OF SPECIFIC INGREDIENTS: WITHOUT INFORMATION

Tannins are the most accepted ingredient (49% would still buy the wine vs 24% on average). Most other ingredients tend to mostly yield uncertain or hesitant views, far more so than outright rejection.

Acceptance of specific wine ingredients: without information

Question: For each of these ingredients, what would your reaction be? Base : all Spanish monthly wine drinkers (randomly) assigned to the scenario ' No information' (n=508)



	Average scores
Base:	*508*
% 'Still buy'	24%
% 'Hesitate'	24%
% 'Not buy'	14%
% 'Don't know'	38%

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

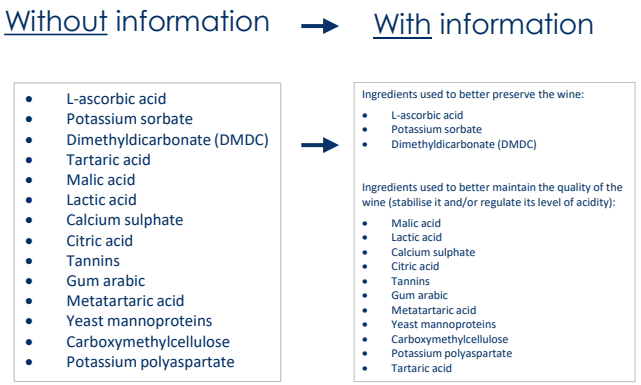
ACCEPTANCE OF SPECIFIC INGREDIENTS: IMPACT OF EDUCATION

For the majority of ingredients, explaining why they are used helps decrease negative views. For three of them, it yields a significant improvement in consideration to buy (L-ascorbic acid, Lactic acid and Potassium sorbate).

Acceptance of specific wine ingredients: impact of education

Question: For each of these ingredients, what would your reaction be?
Base: all Spanish monthly wine drinkers (randomly) assigned to the scenario ' Short explanation' (n=494)

	% I would probably not buy the wine	% I would hesitate to buy it	% I would probably still buy the wine	% I don't know / not sure
Tannins	ns	ns	ns	ns
Citric acid	-4 pts	ns	ns	ns
Yeast mannoproteins	ns	ns	ns	ns
L-ascorbic acid	ns	ns	+7 pts	ns
Tartaric acid	-4 pts	ns	ns	ns
Lactic acid	-6 pts	ns	+9 pts	ns
Malic acid	-5 pts	ns	ns	ns
Calcium sulphate	-5 pts	ns	ns	ns
Metatartaric acid	-5 pts	ns	ns	ns
Potassium sorbate	-6 pts	ns	+8 pts	ns
Potassium polyaspartate	-6 pts	ns	ns	ns
Dimethyldicarbonate (DMDC)	ns	ns	ns	ns
Gum arabic	-6 pts	ns	ns	ns
Carboxymethylcellulose	-6 pts	ns	ns	ns



ns = not significant

Red / Blue : significantly higher / lower than 'Without information' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

CONCLUSIONS: KEY TAKEAWAYS

- Most consumers don't reject the idea of the use of additives in the winemaking process.

  Most either recognise or are neutral regarding the presence of additives in wines. Similarly, they will mostly be neutral or (less often) agree regarding their usefulness in the winemaking process.

- However, 50% believe that good quality wines don't need additives and 37% express concerns regarding their impact on health. Providing reassurance on both counts are points to de considered.

- The disclosure of a short list of ingredients of a known and trusted wine yields increased acceptance.

  The shift from 'contains sulfites' to a short list increases both overall opinion and loyalty. A long list of ingredients harms perceived imagery and yields similar consideration to buy rates than 'contains sulfites'.

- The disclosure of the full list of ingredients improves perceptions of an unknown red wine.

  Shifting from 'contains sulfites' to the full list of ingredients raises consideration to trial. This positive impact is highest for a short list of ingredients.

- A long list of ingredients has a negative impact on the willingness to trial an unknown white wine.

  Shifting from 'contains sulfites' to a long list of ingredients significantly harms the willingness to trial the brand. A short list doesn't change consideration to buy but it improves imagery on at least two counts (environmental credentials and quality perceptions).

- Regarding specific ingredients, tannins and citric acid are the most accepted. For other ingredients, the most common reaction is uncertainty (38%), far more so than outright rejection. Education (i.e. explaining why ingredients are used) yields a significant decrease in negative views for the majority of ingredients (consumers become more neutral or more accepting).

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices
   - New wine: back labels shown to respondents
   - New wine: average findings (white + red wine merged)

APPENDIX : METHODOLOGY – TESTED BACK LABELS (STILL WINE)

Red wine back label:







White wine back label:







Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

APPENDIX : METHODOLOGY – TESTED BACK LABELS (SPARKLING WINE)

Sparkling wine back label:







Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices
   - Trialling a new wine: back labels shown to respondents
   - Trialling a new wine: average findings (white + red wine merged)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

Still (white + red) wine back label: impact of ingredients labelling on consideration to buy

Question : To what extent would you consider buying this wine?
Base: all Spanish monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*331*	*342*	*330*
I would consider / strongly consider buying it	51%	61%	53%
I may consider buying it	34%	29%	33%
I would probably not / definitely not consider buying it	11%	9%	10%
I don't know / not sure	3%	1%	4%
Total	100%	100%	100%
Net impact (% would buy - % would not consider buying)	**40%**	**52%**	**43%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (2/3)

Still (white + red) wine back label : impact of ingredients labelling on price perceptions

Question : This wine is probably…
Base: all Spanish monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*331*	*342*	*330*
Very high-end	1%	3%	3%
High end	26%	27%	23%
Average	56%	58%	56%
Low end	9%	6%	8%
Very low-end	2%	0%	1%
I don't know / not sure	7%	6%	9%
Total	100%	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (1/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% appropriate / very appropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Spanish monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% Appropriate / Very appropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*331*	*342*	*330*
It probably tastes good	78%	79%	74%
A wine that seems to be produced with care	64%	68%	62%
It inspires confidence	63%	71%	65%
A wine I would probably be proud to serve to friends	59%	65%	59%
A wine that is probably produced in an environmentally friendly way	55%	59%	56%
A wine I would probably enjoy for everyday drinking	54%	60%	57%
It probably is of high quality	50%	58%	52%
It probably is an ordinary wine	35%	33%	40%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (2/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% neither appropriate not inappropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Spanish monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% Neither appropriate nor inappropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*331*	*342*	*330*
It probably tastes good	18%	14%	20%
A wine that seems to be produced with care	25%	24%	29%
It inspires confidence	28%	22%	27%
A wine I would probably be proud to serve to friends	28%	25%	28%
A wine that is probably produced in an environmentally friendly way	28%	28%	29%
A wine I would probably enjoy for everyday drinking	29%	25%	26%
It probably is of high quality	33%	28%	31%
It probably is an ordinary wine	33%	36%	35%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (3/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% not / not at all appropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Spanish monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% Not appropriate / Not at all appropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*331*	*342*	*330*
It probably tastes good	2%	3%	3%
A wine that seems to be produced with care	5%	3%	4%
It inspires confidence	5%	2%	5%
A wine I would probably be proud to serve to friends	10%	5%	8%
A wine that is probably produced in an environmentally friendly way	5%	3%	5%
A wine I would probably enjoy for everyday drinking	13%	11%	12%
It probably is of high quality	11%	8%	11%
It probably is an ordinary wine	26%	23%	19%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Spain (n=1,002 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (4/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% I don't know / not sure)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Spanish monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% I don't know / not sure	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*331*	*342*	*330*
It probably tastes good	2%	4%	2%
A wine that seems to be produced with care	6%	5%	6%
It inspires confidence	4%	5%	3%
A wine I would probably be proud to serve to friends	3%	4%	5%
A wine that is probably produced in an environmentally friendly way	12%	10%	10%
A wine I would probably enjoy for everyday drinking	4%	3%	5%
It probably is of high quality	5%	5%	6%
It probably is an ordinary wine	5%	7%	5%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (5/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Spanish monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

Net impact (positive - negative)	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*331*	*342*	*330*
It probably tastes good	76%	76%	71%
A wine that seems to be produced with care	59%	64%	58%
It inspires confidence	58%	69%	60%
A wine I would probably be proud to serve to friends	49%	60%	50%
A wine that is probably produced in an environmentally friendly way	49%	56%	50%
A wine I would probably enjoy for everyday drinking	40%	49%	45%
It probably is of high quality	39%	49%	41%
It probably is an ordinary wine	9%	11%	21%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Connecting wine businesses with knowledge and insights globally

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WINE INTELLIGENCE

Wine consumers' perceptions and reactions towards labelling ingredients on wine bottles

Report: Swedish market, April 2021

INTRODUCTION

Study findings are reported through 11 reports:

1. USA
2. Australia
3. Japan
4. France
5. Germany
6. Italy
7. Russia
8. Spain
9. Sweden — This report
10. UK
11. Multi-market management summary

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
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6. Conclusions
7. Appendices

RESEARCH OBJECTIVES

The overall objective of this study is to assess consumers' perceptions, attitudes and opinions of wine ingredients labelling

Four specific objectives have been assigned to this study:

1. Assess consumers' perceptions and knowledge of winemaking practices.

2. Asses the impact of labelling ingredients on purchase consideration and imagery of a tried and liked wine (impact on brand loyalty) and on an unknown wine (impact on new consumer acquisition).

3. Assess the impact of two levels of information: a short vs long list of ingredients.

4. Assess the level of consumer acceptance for specific ingredients.

METHODOLOGY: DATA COLLECTION

Consumer survey: data gathered via the Vinitrac® Sweden omnibus survey platform:

- **Scope:** all wine drinkers living in Sweden who drink wine at least once a month.
- **Sampling:** quota-based sample (age and gender).
- **Data collection mode:** online.
- **Dates of data collection:** from 11th February to 27th February 2021.
- **Sample size** (after cleaning and weighting procedures): 1,000 respondents.
- Sample profile is shown in the table:

Gender	Male	48%
	Female	52%
	Total	100%
Age	18-24	5%
	25-34	13%
	35-44	13%
	45-54	18%
	55 and above	51%
	Total	100%

STUDY CONTEXT: MARKET SIZE

The survey is representative of the 4.3 million adults living in Sweden who drink wine at least once a month.

	Adult population (millions)	% drink still wine*	Survey is representative of … **million wine drinkers**
USA	241	32%	77
Australia	18.2	50%	9.2
Japan	105.1	22%	23.1
France	51	75%	38
Germany	66.2	42%	27.5
Italy	49.7	62%	31
Russia	16.3	46%	7.5
Spain	38	50%	18.9
Sweden	7.9	55%	4.3
UK	52.4	49%	25.9
Total	**646**	**41%**	**262**

→ This report

*% drink red, white or rosé wine at least once a month, except in two markets:

- France: all wine drinkers who live in France (exc. Corsica and overseas territories)
- Russia: all imported wine drinkers (at least twice per year), aged between 18 and 64 years old, living in Moscow and St Petersburg

[1] Source : national statistics

[2] Source : Wine Intelligence, calibration surveys

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

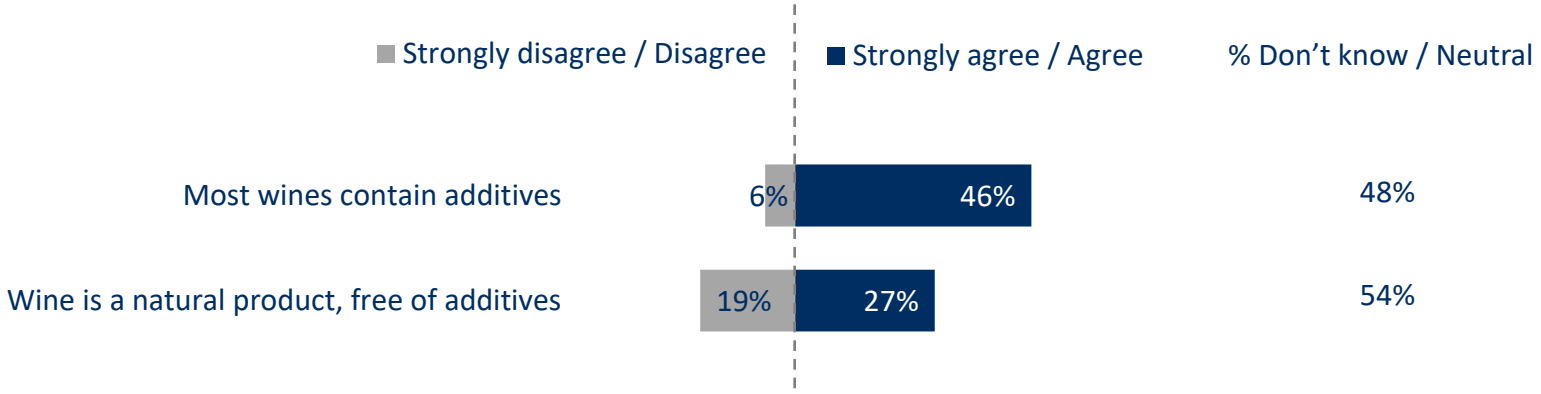
WINEMAKING PERCEPTIONS AND KNOWLEDGE (1/3)

The vast majority of consumers are either neutral or agree regarding the presence of additives in wine. Only 27% perceive wine as being entirely natural.

Winemaking process perceptions and knowledge (1/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all Swedish monthly wine drinkers (n=1,000)

Presence of additives in wine



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1,000 wine drinkers)

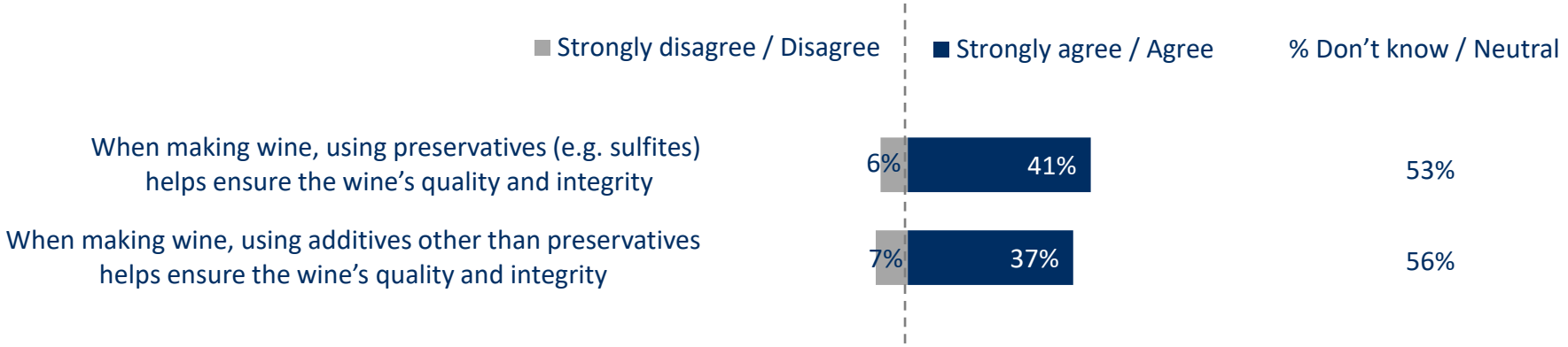
WINEMAKING PERCEPTIONS AND KNOWLEDGE (2/3)

Regarding the usefulness of using additives in wine, the most common view is neutrality. About 2 in 5 perceive additives as being helpful in the winemaking process, compared to less than 1 in 10 saying they're not useful.

Winemaking process perceptions and knowledge (2/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all Swedish monthly wine drinkers (n=1,000)

Usefulness of additives in winemaking process



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1,000 wine drinkers)

WINEMAKING PERCEPTIONS AND KNOWLEDGE (3/3)

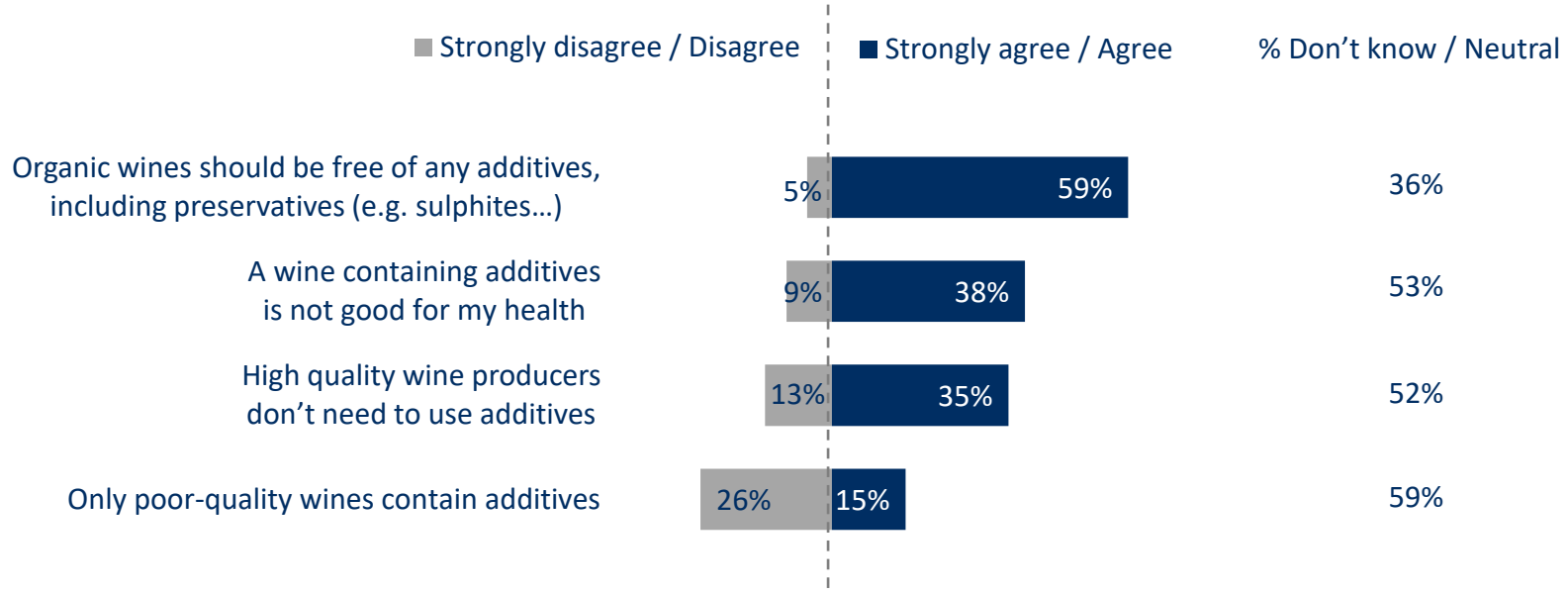
Excluding organic wines, about half of consumers are uncertain regarding whether there is a correlation between wine quality and the presence of additives.

It's noteworthy that 35% have concerns about the impact of additives on their health.

Winemaking process perceptions and knowledge (3/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all Swedish monthly wine drinkers (n=1,000)

Wine additives: quality and health



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY: IMPACT OF WINE INGREDIENTS LABELLING ON A TRIED AND LIKED WINE – QUESTIONNAIRE STRUCTURE

All respondents

Respondents were asked to think about a wine they regularly buy and love drinking.

- Q2: favourite wine style (red wine / white wine / rosé wine)
- Q3: favourite wine perceptions / imagery (10 statements, using a 1-5 scale)

Respondents are informed that the back label exhibits the wine's ingredients.
Each respondent has been randomly assigned to one of the three following scenarios:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients:
"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients:
"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

- Q4: changes in opinion (1 to 5 scale)
- Q5: changes in intent to buy (1 to 5 scale)
- Q6: changes in imagery (10 statements, 1 to 5 scales)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1,000 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON OVERALL OPINION

On average, the disclosure of ingredients will drive down the opinion amongst 16% of consumers. And 39% of them are unsure whether it would make them change their opinion or not.

Known and liked wine: impact of wine ingredients labelling on overall opinion

Question: Now knowing the ingredients it contains, does it change your opinion about this wine?
Base: all Swedish monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈330 per scenario)

	Average across the three lists	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***1,000***	*329*	*341*	*330*
No, it doesn't change my opinion at all	**13%**	13%	15%	12%
No, it doesn't change my opinion much	**32%**	34%	32%	31%
It may change my opinion, I am not sure	**39%**	36%	38%	43%
Yes, it gives me a lower opinion of it	**12%**	13%	12%	12%
Yes, it gives me a rather poor opinion of it	**4%**	5%	3%	3%
Total	**100%**	100%	100%	100%

% lower / rather poor opinion	**16%**	**18%**	**15%**	**14%**

Red / Blue : significantly higher / lower than 'Average across the 3 lists' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1000 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON INTENT TO BUY

On average, the disclosure of ingredients of a favourite wine would yield 14% of consumers to be unwilling to buy it again. And 25% would hesitate or be unsure.

This negative impact tends to be similar across the three labelling formats.

Known and liked wine: impact of wine ingredients labelling on intent to buy

Question: And how likely would you be to repurchase this wine in the future?
Base: all Swedish monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈330 per scenario)

	Average across the three lists	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***1,000***	*329*	*341*	*330*
I would definitely buy it again	**26%**	26%	28%	25%
I would probably buy it again	**35%**	34%	34%	37%
I would hesitate to buy it again	**19%**	23%	16%	17%
I would probably not buy it again	**7%**	7%	8%	7%
I would definitely not buy it again	**6%**	4%	7%	7%
I don't know / not sure	**6%**	6%	6%	7%
Total	**100%**	100%	100%	100%

% probably not buy / definitely not buy again	**14%**	**11%**	**15%**	**14%**

Red / Blue : significantly higher / lower than 'Average across the 3 lists' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1000 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON IMAGERY

Disclosing the list of ingredients on the back label drives imagery perceptions down. This negative impact is slightly lower for 'contains sulfites' only.

Known and liked wine: impact of wine ingredients labelling on imagery

Question: Now knowing the ingredients it contains, please indicate the extent to which you feel that each of the following statements are appropriate to describe your FAVOURITE wine on a 1 to 5 scale where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Swedish monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈330 per scenario)

% Appropriate / Very appropriate	Known and liked wine	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	*1,000*	*329*	*341*	*330*
A taste I like	90%	89%	86%	86%
A wine I am never disappointed with	81%	77%	73%	72%
Very good quality	79%	74%	68%	67%
Good value for money	78%	76%	71%	74%
A wine that I am proud to serve to my friends/family	67%	62%	67%	63%
Made by a producer that I trust	55%	56%	58%	54%
A wine produced with care	54%	48%	52%	47%
A wine that inspires confidence	52%	50%	52%	50%
A wine I enjoy for everyday drinking	34%	34%	39%	35%
A wine produced in an environmentally friendly way	34%	34%	35%	31%

Initial positive views tend to mostly shift to neutral positions, less so to negatives ones.

Red / Blue : significantly higher / lower than 'Known and liked wine' (confidence interval: 95%)

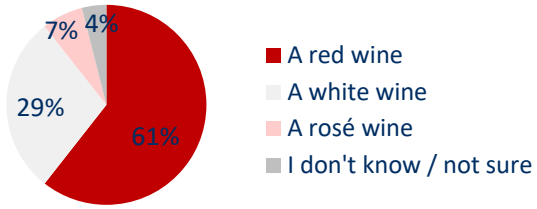
Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1000 wine drinkers)

KNOWN AND LIKED WINE: FINDINGS SUMMARY BY WINE TYPE PREFERENCE

The negative impact of ingredients labelling tends to be similar for both red and white wines (note: sample size is too small for rosé wine).

Known and like wine: by wine type

Question: Please think about your FAVOURITE wine brand or producer, i.e. a wine that you regularly buy and that you love drinking. Is this wine:
Base: all Swedish monthly wine drinkers (n=1,000)



Overall opinion: % lower / rather poor opinion

	Average	Contains sulfites	Short list	Long list
Base:	*1,000*	*329*	*341*	*330*
Red	**16%**	18%	16%	14%
White	**15%**	13%	14%	16%
Rosé	**15%**	20%	9%	13%
Average all styles	**16%**	**18%**	**15%**	**14%**

Intent to buy: % probably not buy / definitely not buy again

	Average	Contains sulfites	Short list	Long list
Base:	*1,000*	*329*	*341*	*330*
Red	**12%**	10%	15%	12%
White	**16%**	10%	17%	19%
Rosé	**17%**	26%	11%	14%
Average all styles	**14%**	**11%**	**15%**	**14%**

Red / Blue : significantly higher / lower than 'Average all colours' (confidence interval: 95%) - Grey: small sample size (n<50)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine :
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY : IMPACT OF WINE INGREDIENTS LABELLING ON A NEW WINE – QUESTIONNAIRE STRUCTURE

We asked respondents to imagine they are in a shop and that they spot a wine that seems to match the type of wine they like to drink. Each respondent was randomly assigned to 1 of the 3 possible scenarios of back labels:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"



"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

Each respondent was shown either a **white** wine (≈50% of respondents) or a **red** wine (≈50% of respondents) back label.

Q7: new wine – consideration to buy (1 to 5 scale)

Q8: new wine – price range perception (scale ranging from 'very low end' to 'very high-end')

Q9: new wine – perceptions / imagery (8 statements, using a scale)

Note: back labels are shown in the appendix.

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1000 wine drinkers)

RED WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

The shift from 'contains sulfites' to a short list doesn't seem to impact much the likelihood of trialling a new red wine.

A long list will yield consumers to be (on average) more neutral.

Red wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this wine?
Base: all Swedish monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***171***	*176*	*158*
I would consider / strongly consider buying it	**46%**	49%	38%
I may consider buying it	**28%**	27%	42%
I would probably not / definitely not consider buying it	**20%**	17%	16%
I don't know / not sure	**6%**	6%	4%
Total	**100%**	100%	100%

Net (% would buy - % would not consider buying)	**26%**	**32%**	**21%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1000 wine drinkers)

RED WINE BACK LABEL : IMPACT OF WINE INGREDIENTS LABELLING (2/3)

The format of wine ingredients list doesn't seem to impact the perceived price of unknown red wine much.

Red wine back label: impact of ingredients labelling on price perceptions

Question: This wine is probably…
Base: all Swedish monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***171***	*176*	*158*
Very high-end	**3%**	3%	2%
High end	**30%**	33%	35%
Average	**45%**	39%	39%
Low end	**7%**	8%	10%
Very low-end	**2%**	1%	2%
I don't know / not sure	**14%**	17%	12%
Total	**100%**	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1000 wine drinkers)

RED WINE BACK LABEL : IMPACT OF WINE INGREDIENTS LABELLING (3/3)

Findings suggest that shifting from 'contains sulfites' to a short list may improve imagery on several dimensions (specially environmentally friendly). (note : differences are not statistically significant).

Red wine back label: impact of ingredients labelling on wine imagery

Question: Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Swedish monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈160)

% Appropriate / Very appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base:	***171***	*176*	*158*
It probably tastes good	**60%**	64%	58%
A wine that seems to be produced with care	**49%**	55%	45%
It probably is an ordinary wine	**47%**	44%	44%
A wine I would probably enjoy for everyday drinking	**46%**	53%	49%
It inspires confidence	**45%**	46%	52%
It probably is of high quality	**43%**	47%	47%
A wine I would probably be proud to serve to friends	**38%**	46%	45%
A wine that is probably produced in an environmentally friendly way	**31%**	38%	32%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

The shift from 'contains sulfites' to the full list of ingredients doesn't significantly impact the willingness to trial a new white wine.

White wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this wine?
Base: all Swedish monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***158***	*165*	*172*
I would consider / strongly consider buying it	**44%**	43%	45%
I may consider buying it	**35%**	34%	33%
I would probably not / definitely not consider buying it	**16%**	15%	16%
I don't know / not sure	**6%**	8%	7%
Total	**100%**	100%	100%

Net impact (% would buy - % would not consider buying)	**28%**	**28%**	**29%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1000 wine drinkers)

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (2/3)

The format of the wine ingredients list doesn't impact the perceived price much. However, a long list of ingredients will decrease the perception of a 'very high end' wine.

White wine back label: impact of ingredients labelling on price perceptions

Question: This wine is probably…
Base: all Swedish monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***158***	*165*	*172*
Very high-end	**7%**	4%	2%
High end	**28%**	34%	34%
Average	**47%**	37%	46%
Low end	**4%**	7%	6%
Very low-end	**1%**	1%	1%
I don't know / not sure	**13%**	16%	10%
Total	**100%**	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1000 wine drinkers)

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (3/3)

A short list of ingredients significantly improves imagery, by increasing the likelihood of being perceived as enjoyable for everyday drinking and proudness to serve.

However, a long list increases the perception of an ordinary wine.

White wine back label: impact of ingredients labelling on wine imagery

Question: Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Swedish monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈160)

% Appropriate / Very appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base:	***158***	*165*	*172*
It probably tastes good	**59%**	60%	62%
A wine that seems to be produced with care	**48%**	51%	48%
It probably is of high quality	**44%**	45%	39%
It inspires confidence	**39%**	49%	42%
A wine I would probably enjoy for everyday drinking	**38%**	52%	46%
It probably is an ordinary wine	**37%**	46%	52%
A wine that is probably produced in an environmentally friendly way	**34%**	43%	32%
A wine I would probably be proud to serve to friends	**32%**	45%	40%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY: IMPACT OF WINE INGREDIENTS LABELLING ON A NEW SPARKLING WINE – QUESTIONNAIRE STRUCTURE

Respondents were asked to imagine they are in a shop and that they spot a wine that seems to match the type of sparkling wine they like to drink. Each respondent is (randomly) shown one of the 3 possible **sparkling wine** back labels:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"



"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

- Q10: new wine – consideration to buy (1 to 5 scale)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1000 wine drinkers)

SPARKLING WINE: IMPACT OF INGREDIENTS LABELLING

Shifting from 'contains sulfites' to the full list of ingredients doesn't impact much consideration to buy an unknown sparkling wine.

Sparkling wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this sparkling wine?
Base: all Swedish monthly wine drinkers (randomly) assigned to one of the 3 possible sparkling wine back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	*329*	*341*	*330*
I would consider / strongly consider buying it	32%	36%	32%
I may consider buying it	34%	34%	36%
I would probably not / definitely not consider buying it	27%	22%	25%
I don't know / not sure	6%	7%	7%
Total	100%	100%	100%
Net impact (% consider - % do not consider)	*5%*	*13%*	*7%*

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

SPECIFIC WINE INGREDIENTS ACCEPTANCE: METHODOLOGY

We asked respondents to imagine they are in a shop and that they spot a wine that seems to match the type of wine they like to drink. Each respondent is (randomly) assigned to one of the two following scenarios:

Scenario 1 (≈50% of respondents)

Respondents are exposed to a list of ingredients, with no information.

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)
- Tartaric acid
- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate

Scenario 2 (≈50% of respondents)

Respondents are exposed to the same list but with short explanations.

Ingredients used to better preserve the wine:

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)

Ingredients used to better maintain the quality of the wine (stabilise it and / or regulate its level of acidity):

- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate
- Tartaric acid

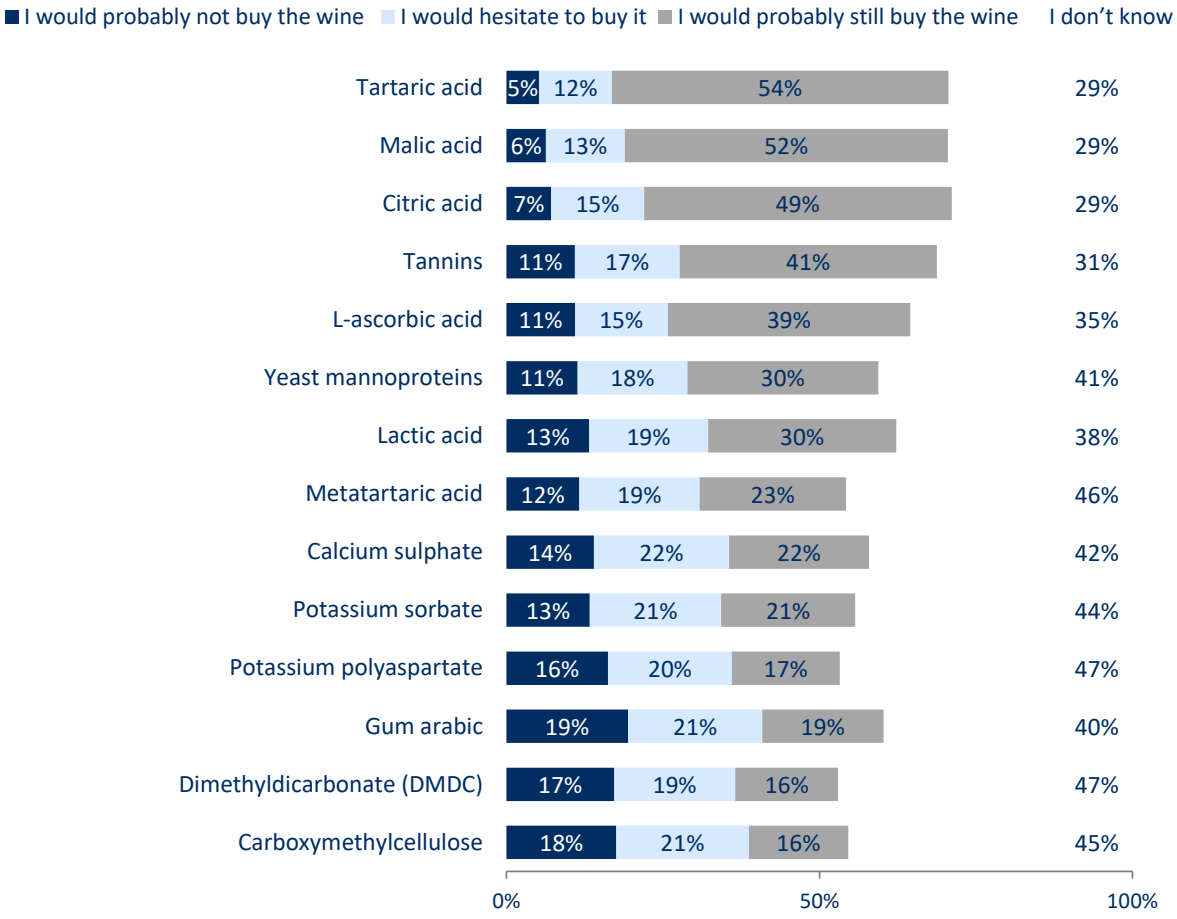
Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1000 wine drinkers)

ACCEPTANCE OF SPECIFIC INGREDIENTS: WITHOUT INFORMATION

Several acids (tartaric, malic and citric) are the most accepted ingredients. Most other ingredients tend to mostly yield uncertain views, far more so than outright rejection.

Acceptance of specific wine ingredients: without information

Question: For each of these ingredients, what would your reaction be? Base : all Swedish monthly wine drinkers (randomly) assigned to the scenario ' No information' (n=509)



	Average scores
Base:	*509*
% 'Still buy'	31%
% 'Hesitate'	18%
% 'Not buy'	12%
% 'Don't know'	39%

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1000 wine drinkers)

ACCEPTANCE OF SPECIFIC INGREDIENTS: IMPACT OF EDUCATION

For the vast majority of ingredients, explaining why they are used increases acceptance. For example, acceptance of Potassium sorbate raises from 21% to 36% (+14 pts).

Acceptance of specific wine ingredients: impact of education

Question: For each of these ingredients, what would your reaction be?
Base: all Swedish monthly wine drinkers (randomly) assigned to the scenario ' Short explanation' (n=491)

	% I would probably not buy the wine	% I would hesitate to buy it	% I would probably still buy the wine	% I don't know / not sure
Tartaric acid	-3 pts	ns	ns	ns
Malic acid	-3 pts	-5 pts	+8 pts	ns
Citric acid	ns	ns	+7 pts	ns
Tannins	-4 pts	ns	ns	ns
L-ascorbic acid	-6 pts	ns	+11 pts	ns
Yeast mannoproteins	-6 pts	ns	+9 pts	ns
Lactic acid	-5 pts	ns	+10 pts	ns
Metatartaric acid	-6 pts	ns	+9 pts	ns
Calcium sulphate	-6 pts	ns	+8 pts	ns
Potassium sorbate	-7 pts	ns	+14 pts	-7 pts
Potassium polyaspartate	-7 pts	ns	+10 pts	ns
Gum arabic	-7 pts	ns	+10 pts	ns
Dimethyldicarbonate (DMDC)	-9 pts	ns	+14 pts	-8 pts
Carboxymethylcellulose	-7 pts	ns	+9 pts	ns

Without information → With information

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)
- Tartaric acid
- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate

Ingredients used to better preserve the wine:

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)

Ingredients used to better maintain the quality of the wine (stabilise it and/or regulate its level of acidity):

- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate
- Tartaric acid

ns = not significant

Red / Blue : significantly higher / lower than 'Without information' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

CONCLUSIONS: KEY TAKEAWAYS

- Most consumers don't reject the idea of the use of additives in the winemaking process.

  Most either recognise or are neutral regarding the presence of additives in wines. Similarly, the vast majority will either agree or be neutral regarding their usefulness in the winemaking process.

- It's noteworthy that 35% believe that good quality wines don't need additives and 38% express concerns regarding their impact on health.

- The disclosure of ingredients of a known and trusted wine yields more uncertainty than rejection.

  14% of consumers state they would stop buying the wine and **25% would hesitate or be unsure**. The disclosure of wine ingredients yields a decrease in imagery perceptions though ratings remain quite high.

- A **short** list of ingredients doesn't impact much the willingness to buy an unknown red wine.

  However, shifting from 'contains sulfites' to a **long list** of ingredients yields a higher number of consumers to be neutral towards it (hence driving down likelihood to buy).

- A **short** list of ingredients doesn't have much impact on willingness to buy an unknown white wine.

  Shifting from 'contains sulfites' to a **short list** of ingredients increases its likelihood of being perceived as enjoyable for everyday drinking and proudness to serve. A long list increases the perceptions of being associated with an ordinary wine.

- Regarding specific ingredients, several acids (tartaric, malic and citric) are the most accepted. For other ingredients, the most common reaction is uncertainty (39%), far more so than outright rejection (12%). Overall, education (i.e. explaining why ingredients are used) significantly helps increasing the level of acceptance.

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1,000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices
   - New wine: back labels shown to respondents
   - New wine: average findings (white + white wine merged)

APPENDIX : METHODOLOGY – TESTED BACK LABELS (STILL WINE)

Red wine back label:







White wine back label:







Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1000 wine drinkers)

APPENDIX : METHODOLOGY – TESTED BACK LABELS (SPARKLING WINE)

Sparkling wine back label:







Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices
   - Trialling a new wine: back labels shown to respondents
   - Trialling a new wine: average findings (white + white wine merged)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

Still (white + red) wine back label: impact of ingredients labelling on consideration to buy

Question : To what extent would you consider buying this wine?
Base: all Swedish monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***329***	*341*	*330*
I would consider / strongly consider buying it	**45%**	46%	42%
I may consider buying it	**32%**	30%	37%
I would probably not / definitely not consider buying it	**18%**	16%	16%
I don't know / not sure	**6%**	7%	5%
Total	**100%**	100%	100%

Net impact (% would buy - % would not consider buying)	**27%**	**30%**	**26%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (2/3)

Still (white + red) wine back label : impact of ingredients labelling on price perceptions

Question : This wine is probably…
Base: all Swedish monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***329***	*341*	*330*
Very high-end	**5%**	4%	2%
High end	**29%**	34%	34%
Average	**46%**	38%	43%
Low end	**5%**	8%	8%
Very low-end	**1%**	1%	2%
I don't know / not sure	**13%**	16%	11%
Total	**100%**	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (1/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% appropriate / very appropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Swedish monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% Appropriate / Very appropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*329*	*341*	*330*
It probably tastes good	60%	62%	60%
A wine that seems to be produced with care	48%	53%	47%
It probably is of high quality	44%	46%	43%
It probably is an ordinary wine	42%	45%	48%
A wine I would probably enjoy for everyday drinking	42%	52%	48%
It inspires confidence	42%	47%	47%
A wine I would probably be proud to serve to friends	36%	46%	42%
A wine that is probably produced in an environmentally friendly way	33%	40%	32%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: Sweden (n=1000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (2/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% neither appropriate not inappropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Swedish monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% Neither appropriate nor inappropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*329*	*341*	*330*
It probably tastes good	22%	24%	24%
A wine that seems to be produced with care	27%	28%	33%
It probably is of high quality	32%	35%	36%
It probably is an ordinary wine	35%	34%	31%
A wine I would probably enjoy for everyday drinking	29%	22%	30%
It inspires confidence	34%	32%	37%
A wine I would probably be proud to serve to friends	41%	32%	38%
A wine that is probably produced in an environmentally friendly way	31%	32%	36%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (3/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% not / not at all appropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Swedish monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% Not appropriate / Not at all appropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*329*	*341*	*330*
It probably tastes good	4%	4%	3%
A wine that seems to be produced with care	6%	4%	6%
It probably is of high quality	8%	8%	9%
It probably is an ordinary wine	8%	10%	11%
A wine I would probably enjoy for everyday drinking	14%	15%	11%
It inspires confidence	10%	7%	8%
A wine I would probably be proud to serve to friends	8%	10%	8%
A wine that is probably produced in an environmentally friendly way	9%	8%	11%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (4/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% I don't know / not sure)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Swedish monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% I don't know / not sure	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*329*	*341*	*330*
It probably tastes good	14%	9%	13%
A wine that seems to be produced with care	19%	14%	14%
It probably is of high quality	16%	12%	13%
It probably is an ordinary wine	15%	11%	10%
A wine I would probably enjoy for everyday drinking	15%	10%	12%
It inspires confidence	14%	14%	9%
A wine I would probably be proud to serve to friends	16%	12%	13%
A wine that is probably produced in an environmentally friendly way	27%	20%	21%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (5/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all Swedish monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

Net impact (positive - negative)	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*329*	*341*	*330*
It probably tastes good	56%	58%	57%
A wine that seems to be produced with care	43%	50%	40%
It probably is of high quality	36%	38%	33%
It probably is an ordinary wine	34%	35%	37%
A wine I would probably enjoy for everyday drinking	28%	37%	37%
It inspires confidence	32%	40%	39%
A wine I would probably be proud to serve to friends	28%	36%	34%
A wine that is probably produced in an environmentally friendly way	24%	32%	21%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

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WINE INTELLIGENCE

Wine consumers' perceptions and reactions towards labelling ingredients on wine bottles

Report: US market, April 2021

OEnoppia

INTRODUCTION

Study findings are reported through 11 reports:

1.	USA	This report
2.	Australia	
3.	Japan	
4.	France	
5.	Germany	
6.	Italy	
7.	Russia	
8.	Spain	
9.	Sweden	
10.	UK	
11.	Multi-market management summary	

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

RESEARCH OBJECTIVES

The overall objective of this study is to assess consumers' perceptions, attitudes and opinions of wine ingredients labelling

Four specific objectives have been assigned to this study:

1. Assess consumers' perceptions and knowledge of winemaking practices.

2. Asses the impact of labelling ingredients on purchase consideration and imagery of a tried and liked wine (impact on brand loyalty) and on an unknown wine (impact on new consumer acquisition).

3. Assess the impact of two levels of information: short vs long list of ingredients.

4. Assess the level of consumer acceptance for specific ingredients.

METHODOLOGY: DATA COLLECTION

Consumer survey: data gathered via the Vinitrac® USA omnibus survey platform:

- **Scope:** all wine drinkers living in the USA who drink wine at least once a month.
- **Sampling:** quota-based sample (age, gender, income and zone of residence).
- **Data collection mode:** online.
- **Dates of data collection:** from 5th February to 25th February 2021.
- **Sample size** (after cleaning and weighting procedures): 2,000 respondents.
- Sample profile is shown in the table:

Gender	Male	43%
	Female	57%
	Total	100%
Age	21-24	4%
	25-34	14%
	35-44	19%
	45-54	16%
	55-64	19%
	65 and above	28%
	Total	100%
Annual pre-tax household income*	Under $20,000	9%
	$20,000 - $29,999	6%
	$30,000 - $39,999	7%
	$40,000 - $49,999	8%
	$50,000 - $59,999	8%
	$60,000 - $69,999 - $99,999	24%
	$100,000 - $149,999	15%
	More than $150,000	23%
	Total	100%
Region of residence	New England	6%
	Middle Atlantic	17%
	East North Central	13%
	West North Central	7%
	South Atlantic	20%
	East South Central	6%
	West South Central	11%
	Mountain	6%
	Pacific	15%
	Total	100%

*'Prefer not to answer' excluded from base

STUDY CONTEXT: MARKET SIZE

The survey is representative of the 77 million adults living in the USA who drink wine at least once a month.

	Adult population (millions)	% drink still wine*	Survey is representative of … **million wine drinkers**	
USA	241	32%	77	→ This report
Australia	18.2	50%	9,2	
Japan	105,1	22%	23,1	
France	51	75%	38	
Germany	66,2	42%	27,5	
Italy	49,7	62%	31	
Russia	16,3	46%	7,5	
Spain	38	50%	18,9	
Sweden	7,9	55%	4,3	
UK	52,4	49%	25,9	
Total	**646**	**41%**	**262**	

*% drink red, white or rosé wine at least once a month, except in two markets:

- France: all wine drinkers who live in France (exc. Corsica and overseas territories)
- Russia: all imported wine drinkers (at least twice per year), aged between 18 and 64 years old, living in Moscow and St Petersburg

[1] Source : national statistics

[2] Source : Wine Intelligence, calibration surveys

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

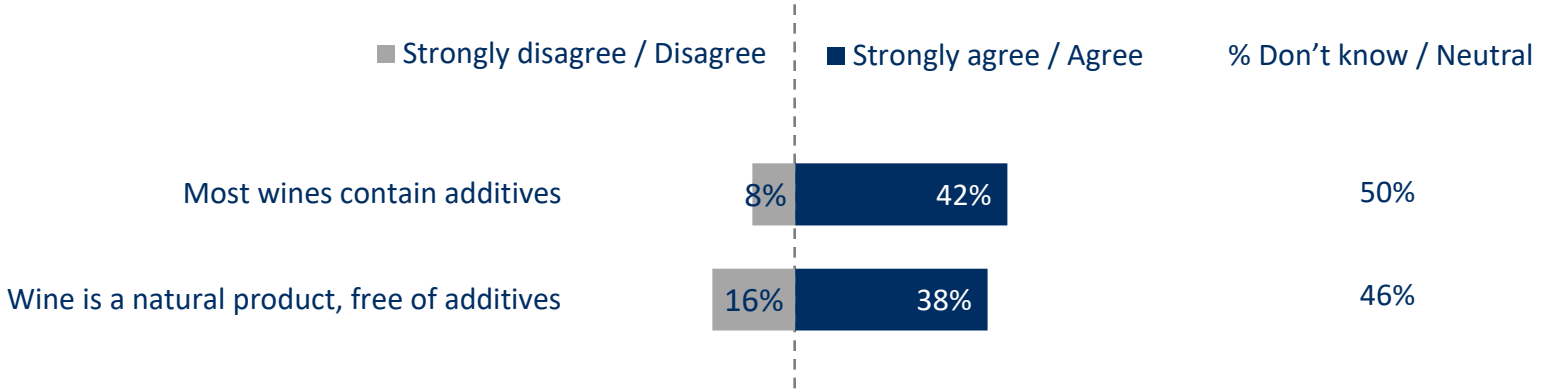
WINEMAKING PERCEPTIONS AND KNOWLEDGE (1/3)

About half of consumers don't express a clear view about the presence of additives in wine. And 42% think most wines contain additives which is about the same as those who perceive wine as being a natural product.

Winemaking process perceptions and knowledge (1/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all US monthly wine drinkers (n=2,000)

Presence of additives in wine



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

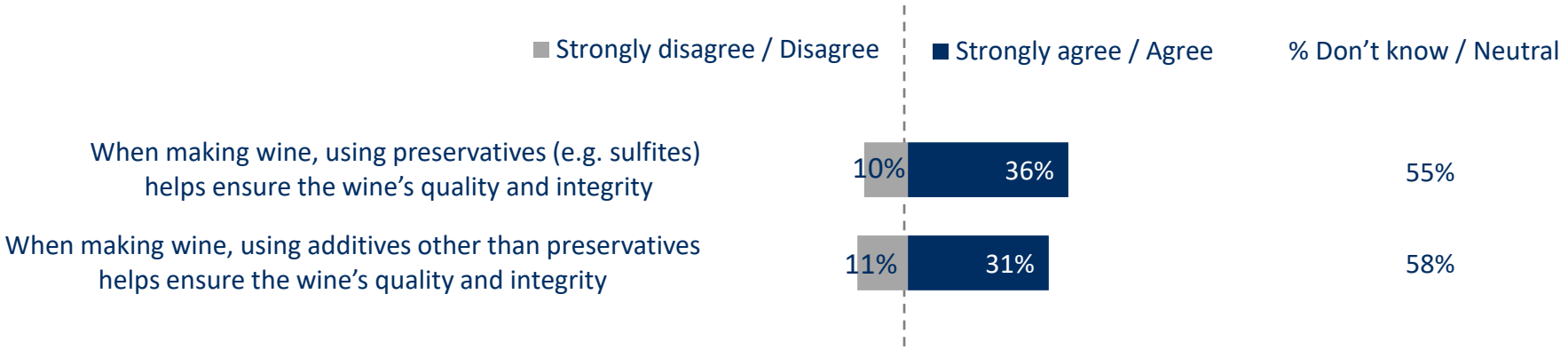
WINEMAKING PERCEPTIONS AND KNOWLEDGE (2/3)

Regarding the usefulness of using additives in wine, the most common view is neutrality or uncertainty. And about 1 in 3 perceive additives as being helpful in the winemaking process. These findings indicate that most wine consumers are not rejecting the idea that additives may be useful in the winemaking process.

Winemaking process perceptions and knowledge (2/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all US monthly wine drinkers (n=2,000)

Usefulness of additives in winemaking process



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

WINEMAKING PERCEPTIONS AND KNOWLEDGE (3/3)

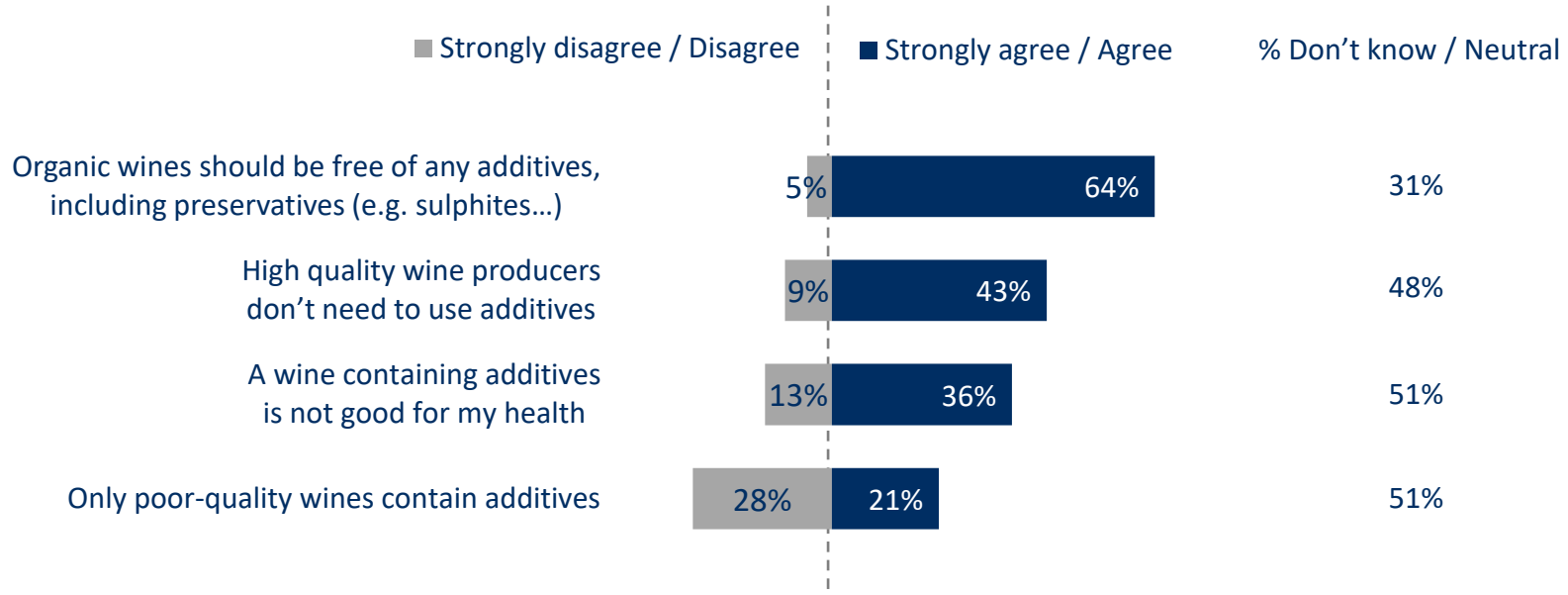
Apart from organic wines, about half of consumers don't express clear views about the correlation between wine quality and additives. However, 43% think that good quality wines don't need to use additives.

It's noteworthy that about 1 in 3 consumers (36%) have concerns about the impact of additives on their health.

Winemaking process perceptions and knowledge (3/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all US monthly wine drinkers (n=2,000)

Wine additives: quality and health



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY: IMPACT OF WINE INGREDIENTS LABELLING ON A TRIED AND LIKED WINE – QUESTIONNAIRE STRUCTURE

All respondents

Respondents were asked to think about a wine they regularly buy and love drinking.

- Q2: favourite wine style (red wine / white wine / rosé wine)
- Q3: favourite wine perceptions / imagery (10 statements, using a 1-5 scale)

Respondents are informed that the back label exhibits the wine's ingredients.
Each respondent has been randomly assigned to one of the three following scenarios:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients:
"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients:
"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

- Q4: changes in opinion (1 to 5 scale)
- Q5: changes in intent to buy (1 to 5 scale)
- Q6: changes in imagery (10 statements, 1 to 5 scales)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON OVERALL OPINION

On average, the disclosure of ingredients drives down the opinion amongst 19% of consumers (12% 'lower opinion' and 7% 'rather poor opinion').

Known and liked wine: impact of wine ingredients labelling on overall opinion

Question: Now knowing the ingredients it contains, does it change your opinion about this wine?
Base: all US monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈660 per scenario)

	Average across the three lists	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***2,000***	*672*	*656*	*673*
No, it doesn't change my opinion at all	**19%**	18%	21%	19%
No, it doesn't change my opinion much	**28%**	26%	30%	27%
It may change my opinion, I am not sure	**34%**	36%	30%	35%
Yes, it gives me a lower opinion of it	**12%**	14%	11%	11%
Yes, it gives me a rather poor opinion of it	**7%**	6%	7%	9%
Total	**100%**	100%	100%	100%

% lower / rather poor opinion	**19%**	**20%**	**18%**	**19%**

Red / Blue : significantly higher / lower than 'Average across the 3 lists' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON INTENT TO BUY

On average, the disclosure of ingredients of a favourite wine would mean 12% of consumers would be unwilling to buy it again while 21% would hesitate (or be unsure).

This negative impact (i.e. rate of rejection) doesn't vary between the three tested labelling formats.

Known and liked wine: impact of wine ingredients labelling on intent to buy

Question: And how likely would you be to repurchase this wine in the future?
Base: all US monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈660 per scenario)

	Average across the three lists	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***2,000***	*672*	*656*	*673*
I would definitely buy it again	**34%**	33%	36%	34%
I would probably buy it again	**33%**	31%	34%	34%
I would hesitate to buy it again	**13%**	16%	11%	13%
I would probably not buy it again	**6%**	8%	6%	6%
I would definitely not buy it again	**6%**	5%	7%	5%
I don't know / not sure	**8%**	8%	7%	8%
Total	**100%**	100%	100%	100%

% probably not buy / definitely not buy again	**12%**	**12%**	**13%**	**11%**

Red / Blue : significantly higher / lower than 'Average across the 3 lists' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON IMAGERY

Disclosing the list of ingredients on the back label drives imagery perceptions down. The negative impact is correlated with the number of ingredients shown in the list (i.e. lowest for 'contains sulfites' and highest for the long list).

Known and liked wine: impact of wine ingredients labelling on imagery

Question: Now knowing the ingredients it contains, please indicate the extent to which you feel that each of the following statements are appropriate to describe your FAVOURITE wine on a 1 to 5 scale where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all US monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈660 per scenario)

% Appropriate / Very appropriate	Known and liked wine	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	*2,000*	*672*	*656*	*673*
A taste I like	93%	88%	88%	88%
Good value for money	89%	85%	83%	84%
Very good quality	89%	84%	82%	79%
A wine I am never disappointed with	86%	85%	83%	81%
A wine I enjoy for everyday drinking	84%	81%	79%	81%
A wine that I am proud to serve to my friends/family	82%	79%	76%	74%
Made by a producer that I trust	77%	76%	74%	72%
A wine produced with care	74%	72%	70%	67%
A wine that inspires confidence	58%	58%	59%	54%
A wine produced in an environmentally friendly way	55%	55%	55%	55%

Initial positive views shifting towards both neutral and negative views (slightly more towards neutral grounds).

Red / Blue : significantly higher / lower than 'Known and liked wine' (confidence interval: 95%)

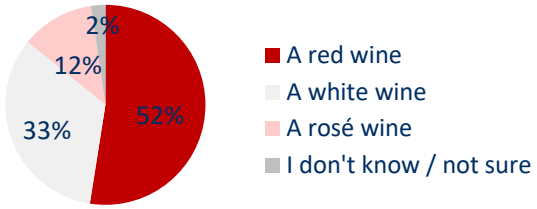
Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

KNOWN AND LIKED WINE: FINDINGS SUMMARY BY WINE TYPE PREFERENCE

The negative impact of ingredients labelling on overall opinion is higher for red wines. However, the impact on intent to buy is similar across the three colours.

Known and like wine: by wine type

Question: Please think about your FAVOURITE wine brand or producer, i.e. a wine that you regularly buy and that you love drinking. Is this wine:
Base: all US monthly wine drinkers (n=2,000)



Overall opinion: % lower / rather poor opinion

	Average	Contains sulfites	Short list	Long list
Base:	*2,000*	*672*	*656*	*673*
Red	**22%**	21%	21%	23%
White	**17%**	18%	17%	15%
Rosé	**16%**	20%	11%	16%
Average all styles	**19%**	**20%**	**18%**	**19%**

On average, the negative impact of ingredients labelling is higher for red wines (22%) than for white and rosé wines (17% and 16%).

Intent to buy: % probably not buy / definitely not buy again

	Average	Contains sulfites	Short list	Long list
Base:	*2,000*	*672*	*656*	*673*
Red	**12%**	12%	13%	12%
White	**12%**	13%	11%	11%
Rosé	**10%**	11%	13%	7%
Average all styles	**12%**	**12%**	**13%**	**11%**

On average, the negative impact of ingredients labelling is similar across the three colours.

Red / Blue : significantly higher / lower than 'Average all colours' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine :
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY : IMPACT OF WINE INGREDIENTS LABELLING ON A NEW WINE – QUESTIONNAIRE STRUCTURE

We asked respondents to imagine they are in a shop and that they spot a wine that seems to match the type of wine they like to drink. Each respondent was randomly assigned to 1 of the 3 possible scenarios of back labels:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"



"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

Each respondent was shown either a **white** wine (≈50% of respondents) or a **red** wine (≈50% of respondents) back label.

Q7: new wine – consideration to buy (1 to 5 scale)

Q8: new wine – price range perception (scale ranging from 'very low end' to 'very high-end')

Q9: new wine – perceptions / imagery (8 statements, using a scale)

Note: back labels are shown in the appendix.

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

RED WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

Findings suggest that the shift from 'contains sulfites' to the full list of ingredients yields a slightly higher likelihood of trialling a new red wine (42% net positive intent vs 35%; note: differences are not statistically significant).

Red wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this wine?
Base: all US monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***335***	*326*	*338*
I would consider / strongly consider buying it	**54%**	58%	57%
I may consider buying it	**24%**	23%	27%
I would probably not / definitely not consider buying it	**19%**	17%	14%
I don't know / not sure	**2%**	2%	2%
Total	**100%**	100%	100%

Net (% would buy - % would not consider buying)	**35%**	**42%**	**42%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

RED WINE BACK LABEL : IMPACT OF WINE INGREDIENTS LABELLING (2/3)

The disclosure of all wine ingredients doesn't seems to drive perceived value slightly up (specially for a short list).

Red wine back label: impact of ingredients labelling on price perceptions

Question: This wine is probably…
Base: all US monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***335***	*326*	*338*
Very high-end	**7%**	12%	10%
High end	**28%**	24%	26%
Average	**56%**	53%	50%
Low end	**3%**	3%	5%
Very low-end	**1%**	1%	2%
I don't know / not sure	**6%**	7%	8%
Total	**100%**	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

RED WINE BACK LABEL : IMPACT OF WINE INGREDIENTS LABELLING (3/3)

The disclosure of the full list of wine ingredients doesn't significantly impact perceived imagery.

Red wine back label: impact of ingredients labelling on wine imagery

Question: Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all US monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈330)

% Appropriate / Very appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base:	***335***	*326*	*338*
It probably tastes good	**79%**	75%	74%
A wine I would probably be proud to serve to friends	**68%**	63%	67%
A wine I would probably enjoy for everyday drinking	**66%**	67%	63%
A wine that seems to be produced with care	**64%**	66%	67%
It probably is of high quality	**63%**	59%	57%
It probably is an ordinary wine	**53%**	53%	53%
It inspires confidence	**52%**	51%	50%
A wine that is probably produced in an environmentally friendly way	**51%**	53%	50%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

Ingredients labelling (on top of 'contains sulfites') doesn't significantly impact consideration to buy an unknown white wine.

Though findings suggest that consideration to buy may be slightly less for a long list of ingredients (note: differences are not statistically different).

White wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this wine?
Base: all US monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***337***	*330*	*334*
I would consider / strongly consider buying it	**51%**	49%	46%
I may consider buying it	**23%**	27%	29%
I would probably not / definitely not consider buying it	**22%**	20%	21%
I don't know / not sure	**3%**	4%	4%
Total	**100%**	100%	100%
Net impact (% would buy - % would not consider buying)	**29%**	**29%**	**25%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (2/3)

The format of the wine ingredients list doesn't seem to significantly impact the perceived price of an unknown white wine.

White wine back label: impact of ingredients labelling on price perceptions

Question: This wine is probably…
Base: all US monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***337***	*330*	*334*
Very high-end	**9%**	10%	7%
High end	**26%**	23%	20%
Average	**49%**	51%	56%
Low end	**6%**	3%	4%
Very low-end	**1%**	2%	2%
I don't know / not sure	**8%**	11%	11%
Total	**100%**	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (3/3)

Consumers perceive few differences between the three lists. However, the perczption of taste may suffer from the disclosure of a long list of ingredients (70% vs 77% for 'contains sulfites').

White wine back label: impact of ingredients labelling on wine imagery

Question: Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all US monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈330)

% Appropriate / Very appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base:	***337***	*330*	*334*
It probably tastes good	**77%**	72%	70%
A wine that seems to be produced with care	**65%**	66%	63%
A wine I would probably enjoy for everyday drinking	**63%**	61%	63%
A wine I would probably be proud to serve to friends	**61%**	62%	61%
It probably is of high quality	**58%**	59%	55%
A wine that is probably produced in an environmentally friendly way	**52%**	51%	48%
It probably is an ordinary wine	**48%**	48%	53%
It inspires confidence	**46%**	47%	46%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY: IMPACT OF WINE INGREDIENTS LABELLING ON A NEW SPARKLING WINE – QUESTIONNAIRE STRUCTURE

Respondents were asked to imagine they are in a shop and that they spot a wine that seems to match the type of sparkling wine they like to drink. Each respondent is (randomly) shown one of the 3 possible **sparkling wine** back labels:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"



"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

- Q10: new wine – consideration to buy (1 to 5 scale)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

SPARKLING WINE: IMPACT OF INGREDIENTS LABELLING

Consumers express higher consideration to buy a sparkling wine with a short list of ingredients (47% positive intent, vs 38% for 'contains sulfites').

Findings suggest a similar effect for a long list of ingredients (though difference with 'contains sulfites' is not statistically significant).

Sparkling wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this sparkling wine?
Base: all US monthly wine drinkers (randomly) assigned to one of the 3 possible sparkling wine back labels (n≈660)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	*672*	*656*	*673*
I would consider / strongly consider buying it	38%	47%	43%
I may consider buying it	29%	25%	28%
I would probably not / definitely not consider buying it	28%	24%	25%
I don't know / not sure	4%	3%	4%
Total	100%	100%	100%
Net impact (% consider - % do not consider)	*11%*	*23%*	*18%*

Rouge / Bleu : significativement supérieur / inférieur à 'Contient des sulfites' (indice de confiance : 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

SPECIFIC WINE INGREDIENTS ACCEPTANCE: METHODOLOGY

We asked respondents to imagine they are in a shop and that they spot a wine that seems to match the type of wine they like to drink. Each respondent is (randomly) assigned to one of the two following scenarios:

Scenario 1 (≈50% of respondents)

Respondents are exposed to a list of ingredients, with no information.

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)
- Tartaric acid
- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate

Scenario 2 (≈50% of respondents)

Respondents are exposed to the same list but with short explanations.

Ingredients used to better preserve the wine:

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)

Ingredients used to better maintain the quality of the wine (stabilise it and / or regulate its level of acidity):

- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate
- Tartaric acid

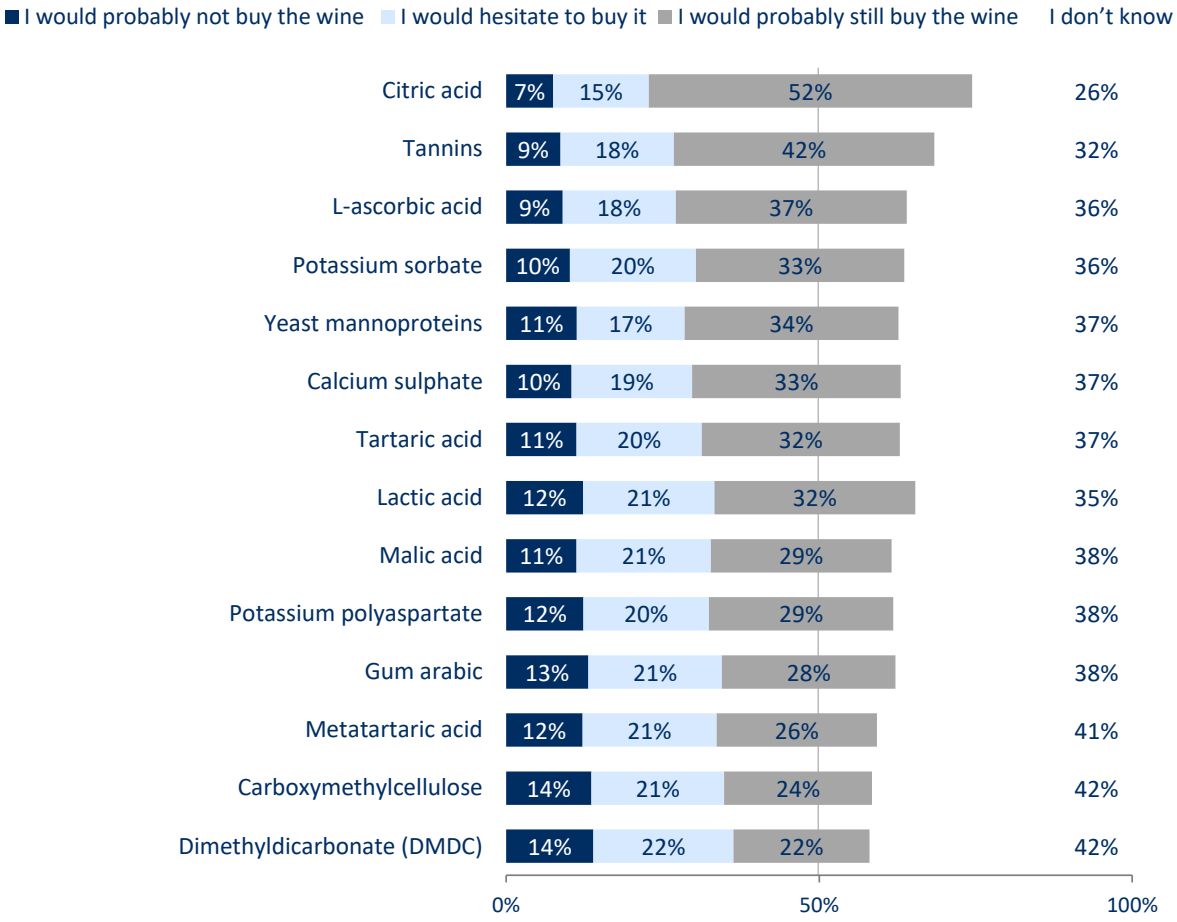
Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

ACCEPTANCE OF SPECIFIC INGREDIENTS: WITHOUT INFORMATION

Citric acid is the most accepted ingredient, ahead of tannins (respect. 52% and 42% of acceptance). Other ingredients mostly yield either acceptance or uncertain views, far more than outright rejection.

Acceptance of specific wine ingredients: without information

Question: For each of these ingredients, what would your reaction be? Base : all US monthly wine drinkers (randomly) assigned to the scenario ' No information' (n=1012)



	Average scores
Base:	*1012*
% 'Still buy'	32%
% 'Hesitate'	20%
% 'Not buy'	11%
% 'Don't know'	37%

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

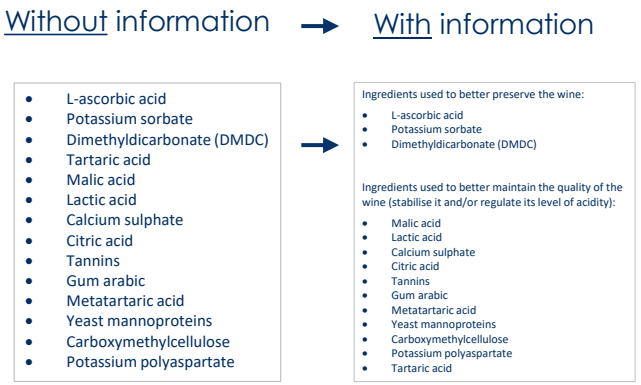
ACCEPTANCE OF SPECIFIC INGREDIENTS: IMPACT OF EDUCATION

Providing a short explanation on why an ingredient is used significantly helps reassuring consumers. Overall, it improves the rate of acceptance by about +7 pts on average.

Acceptance of specific wine ingredients: impact of education

Question: For each of these ingredients, what would your reaction be?
Base: all US monthly wine drinkers (randomly) assigned to the scenario ' Short explanation' (n=988)

	% I would probably not buy the wine	% I would hesitate to buy it	% I would probably still buy the wine	% I don't know / not sure
Citric acid	ns	ns	+6 pts	ns
Tannins	ns	ns	+7 pts	ns
L-ascorbic acid	-2 pts	ns	+14 pts	-10 pts
Potassium sorbate	-4 pts	ns	+12 pts	-7 pts
Yeast mannoproteins	-3 pts	ns	+7 pts	ns
Calcium sulphate	-3 pts	ns	+7 pts	ns
Tartaric acid	-4 pts	ns	+5 pts	ns
Lactic acid	-4 pts	ns	+6 pts	ns
Malic acid	-3 pts	ns	+6 pts	ns
Potassium polyaspartate	-4 pts	ns	+5 pts	ns
Gum arabic	-3 pts	ns	+6 pts	ns
Metatartaric acid	-4 pts	ns	+5 pts	ns
Carboxymethylcellulose	ns	ns	ns	-5 pts
Dimethyldicarbonate (DMDC)	-4 pts	ns	+11 pts	-7 pts



ns = not significant

Red / Blue : significantly higher / lower than 'Without information' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
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7. Appendices

CONCLUSIONS: KEY TAKEAWAYS

- Most consumers don't reject the idea of the use of additives in the winemaking process.

  Most either recognise or are neutral regarding the presence of additives in wines. Similarly, they will be neutral or (less often) agree regarding its usefulness in the winemaking process.

- However, 43% believe that good quality wines don't need additives and 36% express concerns regarding their impact on health. Providing reassurance are points to be considered.

- The disclosure of ingredients of a known and trusted wine yields more uncertainty than rejection.

  12% of consumers state they would stop buying the wine and **21% would hesitate or be unsure**. The disclosure of wine ingredients yields a decrease in imagery perceptions though ratings remain quite high. From this point of view, a short list of ingredients is preferable to a long one.

- The disclosure of the full list of ingredients doesn't impact much on an unknown red wine

- The disclosure of the full list of ingredients doesn't impact much on an unknown white wine

  However, shifting from 'contains sulfites' to a **long list** of ingredients tends to harm taste perceptions (which remain quite high).

- Regarding specific ingredients, **citric acid** and **tannins** are the most accepted. On average, the most common reaction regarding ingredients is uncertainty (37% 'don't know / unsure') or acceptance (32%), more so than outright rejection. On average, **education** (i.e. explaining why ingredients are used) significantly increases the rate of acceptance for most ingredients.

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

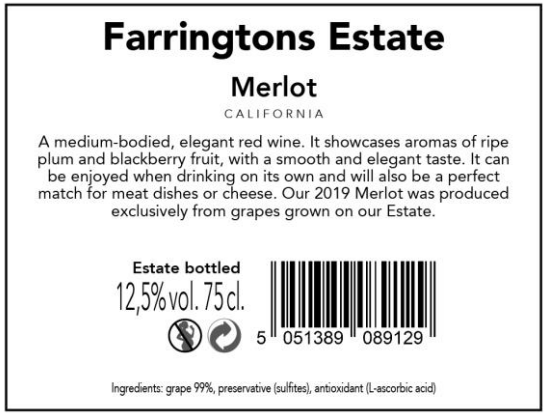
CONTENTS

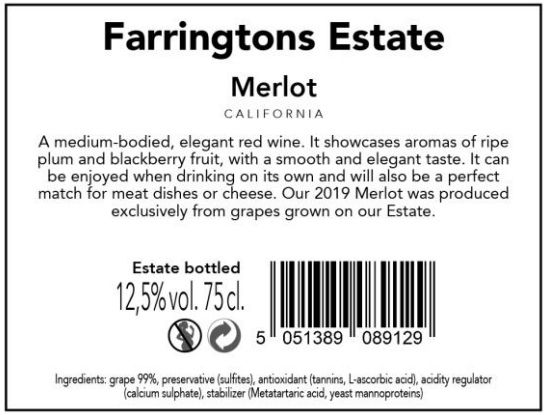
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3. Impact of wine ingredients labelling on a tried (and liked) wine
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   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices
   - New wine: back labels shown to respondents
   - New wine: average findings (white + white wine merged)

APPENDIX : METHODOLOGY – TESTED BACK LABELS (STILL WINE)

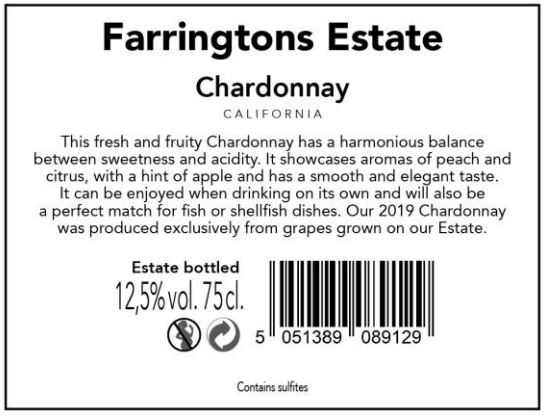
Red wine back label:

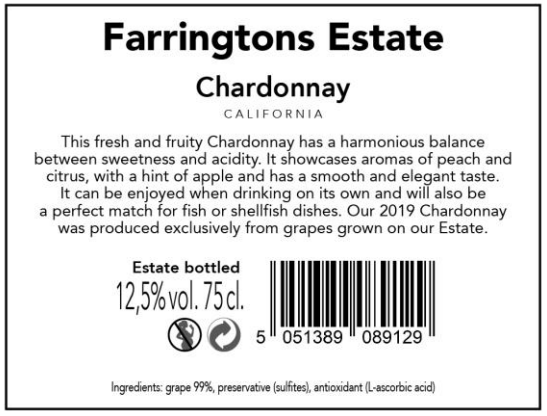


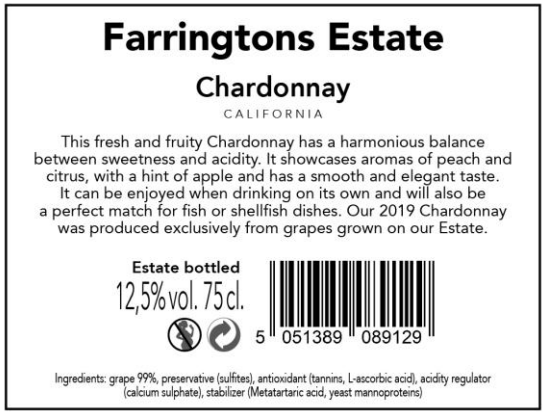




White wine back label:







Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

APPENDIX : METHODOLOGY – TESTED BACK LABELS (SPARKLING WINE)

Sparkling wine back label:







Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices
   - Trialling a new wine: back labels shown to respondents
   - Trialling a new wine: average findings (white + white wine merged)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

Still (white + red) wine back label: impact of ingredients labelling on consideration to buy

Question : To what extent would you consider buying this wine?
Base: all US monthly wine drinkers (randomly) assigned to one of the three back labels (n≈660)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*672*	*656*	*673*
I would consider / strongly consider buying it	53%	53%	51%
I may consider buying it	24%	25%	28%
I would probably not / definitely not consider buying it	21%	19%	18%
I don't know / not sure	3%	3%	3%
Total	100%	100%	100%

Net impact (% would buy - % would not consider buying)	**32%**	**35%**	**34%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (2/3)

Still (white + red) wine back label : impact of ingredients labelling on price perceptions

Question : This wine is probably…
Base: all US monthly wine drinkers (randomly) assigned to one of the three back labels (n≈660)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*672*	*656*	*673*
Very high-end	8%	11%	8%
High end	27%	23%	23%
Average	52%	52%	53%
Low end	4%	3%	4%
Very low-end	1%	2%	2%
I don't know / not sure	7%	9%	9%
Total	100%	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (1/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% appropriate / very appropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all US monthly wine drinkers (randomly) assigned to one of the three back labels (n≈660)

% Appropriate / Very appropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*672*	*656*	*673*
It probably tastes good	78%	74%	72%
A wine I would probably be proud to serve to friends	65%	62%	64%
A wine that seems to be produced with care	65%	66%	65%
A wine I would probably enjoy for everyday drinking	64%	63%	63%
It probably is of high quality	60%	59%	56%
A wine that is probably produced in an environmentally friendly way	52%	52%	49%
It probably is an ordinary wine	51%	51%	53%
It inspires confidence	49%	48%	48%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (2/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% neither appropriate not inappropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all US monthly wine drinkers (randomly) assigned to one of the three back labels (n≈660)

% Neither appropriate nor inappropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*672*	*656*	*673*
It probably tastes good	15%	17%	16%
A wine I would probably be proud to serve to friends	24%	26%	24%
A wine that seems to be produced with care	25%	24%	22%
A wine I would probably enjoy for everyday drinking	22%	19%	21%
It probably is of high quality	28%	28%	29%
A wine that is probably produced in an environmentally friendly way	32%	32%	33%
It probably is an ordinary wine	33%	31%	28%
It inspires confidence	35%	35%	35%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (3/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% not / not at all appropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all US monthly wine drinkers (randomly) assigned to one of the three back labels (n≈660)

% Not appropriate / Not at all appropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*672*	*656*	*673*
It probably tastes good	3%	4%	5%
A wine I would probably be proud to serve to friends	5%	6%	6%
A wine that seems to be produced with care	4%	4%	5%
A wine I would probably enjoy for everyday drinking	11%	11%	9%
It probably is of high quality	6%	5%	7%
A wine that is probably produced in an environmentally friendly way	5%	5%	6%
It probably is an ordinary wine	11%	14%	10%
It inspires confidence	9%	8%	9%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (4/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% I don't know / not sure)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all US monthly wine drinkers (randomly) assigned to one of the three back labels (n≈660)

% I don't know / not sure	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*672*	*656*	*673*
It probably tastes good	4%	5%	6%
A wine I would probably be proud to serve to friends	6%	6%	7%
A wine that seems to be produced with care	6%	7%	8%
A wine I would probably enjoy for everyday drinking	3%	7%	7%
It probably is of high quality	7%	8%	8%
A wine that is probably produced in an environmentally friendly way	12%	12%	12%
It probably is an ordinary wine	6%	5%	9%
It inspires confidence	7%	8%	8%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: USA (n=2000 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (5/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all US monthly wine drinkers (randomly) assigned to one of the three back labels (n≈660)

Net impact (positive - negative)	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*672*	*656*	*673*
It probably tastes good	75%	70%	67%
A wine I would probably be proud to serve to friends	60%	56%	58%
A wine that seems to be produced with care	61%	62%	60%
A wine I would probably enjoy for everyday drinking	53%	53%	55%
It probably is of high quality	54%	54%	49%
A wine that is probably produced in an environmentally friendly way	47%	47%	43%
It probably is an ordinary wine	39%	37%	43%
It inspires confidence	40%	41%	39%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Connecting wine businesses with knowledge and insights globally

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WINE INTELLIGENCE

Wine consumers' perceptions and reactions towards labelling ingredients on wine bottles

Report: UK market, April 2021

OEnoppia

INTRODUCTION

Study findings are reported through 11 reports:

1.	USA	
2.	Australia	
3.	Japan	
4.	France	
5.	Germany	
6.	Italy	
7.	Russia	
8.	Spain	
9.	Sweden	
10.	UK	This report
11.	Multi-market management summary	

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
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6. Conclusions
7. Appendices

RESEARCH OBJECTIVES

The overall objective of this study is to assess consumers' perceptions, attitudes and opinions of wine ingredients labelling

Four specific objectives have been assigned to this study:

1. Assess consumers' perceptions and knowledge of winemaking practices.

2. Asses the impact of labelling ingredients on purchase consideration and imagery of a tried and liked wine (impact on brand loyalty) and on an unknown wine (impact on new consumer acquisition).

3. Assess the impact of two levels of information: short vs long list of ingredients.

4. Assess the level of consumer acceptance for specific ingredients.

METHODOLOGY: DATA COLLECTION

Consumer survey: data gathered via the Vinitrac® UK omnibus survey platform:

- **Scope:** all wine drinkers living in the UK who drink wine at least once a month.
- **Sampling:** quota-based sample (age, gender, income and region of residence).
- **Data collection mode:** online.
- **Dates of data collection:** from 29th January to 16th February 2021.
- **Sample size** (after cleaning and weighting procedures): 1,003 respondents.
- Sample profile is shown in the table:

Gender	Male	49%
	Female	51%
	Total	100%
Age	18-24	7%
	25-34	17%
	35-44	17%
	45-54	18%
	55-64	13%
	65 and above	27%
	Total	100%
Annual pre-tax household income*	Under £20,000	12%
	£20,000 - £29,999	21%
	£30,000 - £39,999	21%
	£40,000 - £59,999	20%
	£60,000+	26%
	Total	100%
Region of residence	North	22%
	Midlands	14%
	South East / East	23%
	London	14%
	South West	11%
	Wales	5%
	Scotland	8%
	Northern Ireland	3%
	Total	100%

*'Prefer not to answer' excluded from base

STUDY CONTEXT: MARKET SIZE

The survey is representative of the 25.9 million adults living in the UK who drink wine at least once a month.

	Adult population (millions)	% drink still wine*	Survey is representative of … **million wine drinkers**
USA	241	32%	77
Australia	18.2	50%	9,2
Japan	105,1	22%	23,1
France	51	75%	38
Germany	66,2	42%	27,5
Italy	49,7	62%	31
Russia	16,3	46%	7,5
Spain	38	50%	18,9
Sweden	7,9	55%	4,3
UK	52,4	49%	25,9
Total	**646**	**41%**	**262**

→ This report

*% drink red, white or rosé wine at least once a month, except in two markets:

- France: all wine drinkers who live in France (exc. Corsica and overseas territories)
- Russia: all imported wine drinkers (at least twice per year), aged between 18 and 64 years old, living in Moscow and St Petersburg

[1] Source : national statistics

[2] Source : Wine Intelligence, calibration surveys

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
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   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

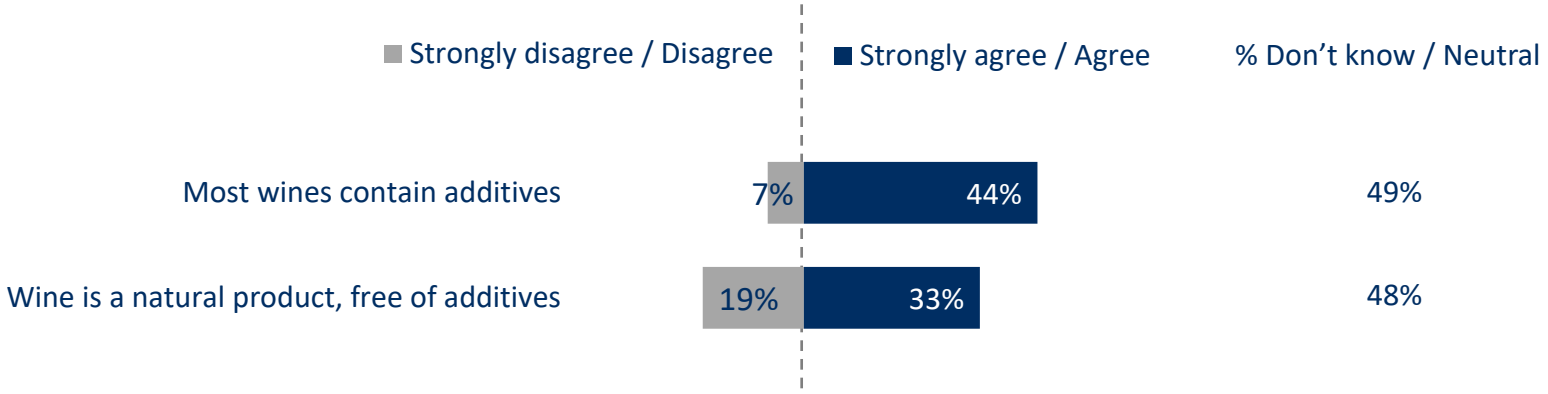
WINEMAKING PERCEPTIONS AND KNOWLEDGE (1/3)

About half of consumers are either neutral or uncertain about the presence of additives in wine. A minority (33%) perceive wine as being free of additives.

Winemaking process perceptions and knowledge (1/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all UK monthly wine drinkers (n=1,003)

Presence of additives in wine



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

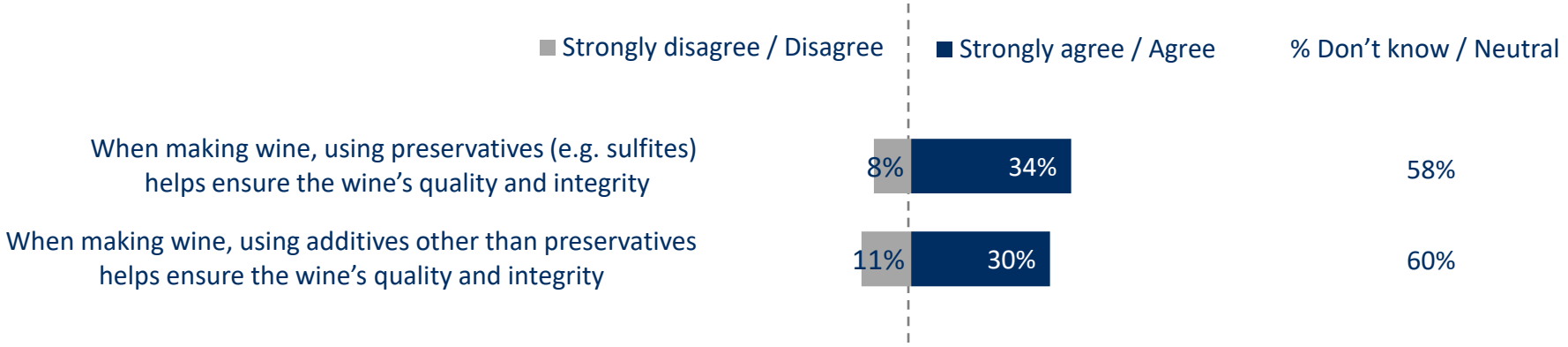
WINEMAKING PERCEPTIONS AND KNOWLEDGE (2/3)

Regarding the usefulness of using additives in wine, the most common view is neutrality or uncertainty. Very few consumers (about 1 in 10) reject the idea of the usefulness of additives in winemaking process.

Winemaking process perceptions and knowledge (2/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all UK monthly wine drinkers (n=1,003)

Usefulness of additives in winemaking process



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

WINEMAKING PERCEPTIONS AND KNOWLEDGE (3/3)

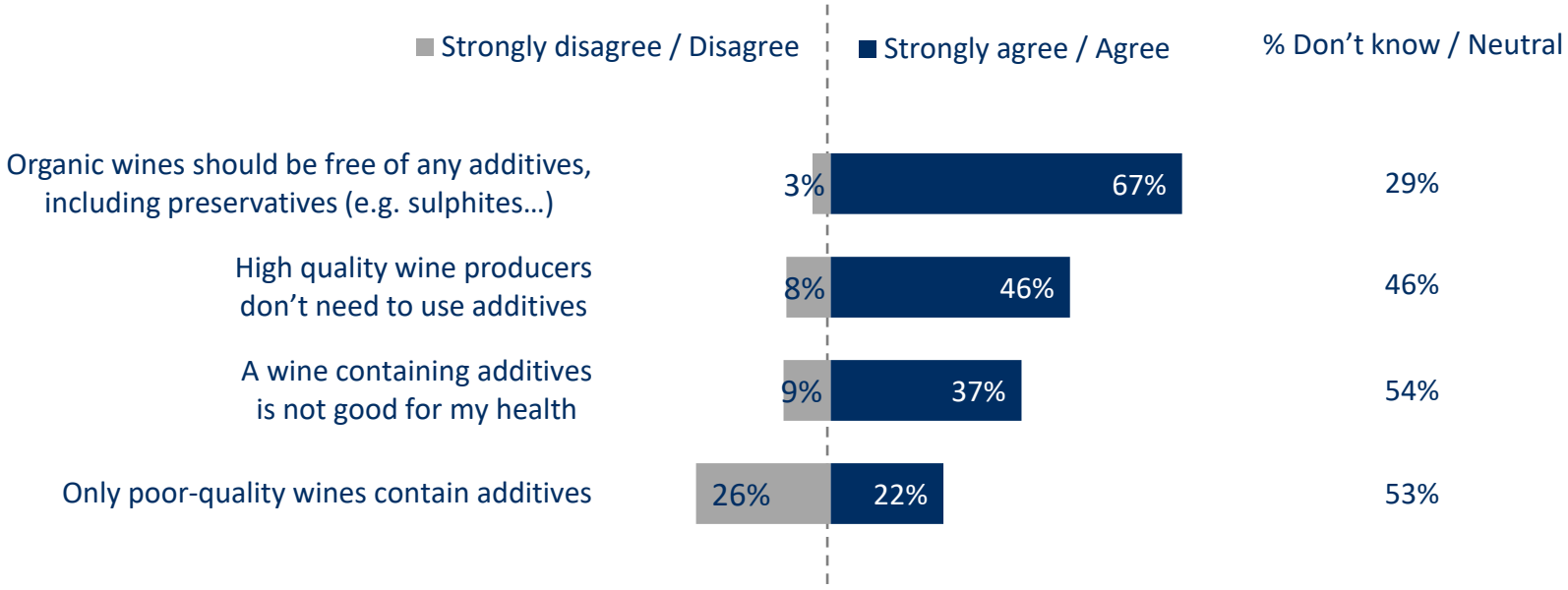
Apart from organic wines, almost half of consumers believe that high quality wines don't need to use additives. However, only 26% believe that only poor quality wines contain additives. This suggests that the majority of wine consumers are either neutral or accepting the presence of additives in wine.

It's noteworthy that 37% have concerns about the impact of additives on their health.

Winemaking process perceptions and knowledge (3/3)

Question: Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly".
Base: all UK monthly wine drinkers (n=1,003)

Wine additives: quality and health



Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
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7. Appendices

METHODOLOGY: IMPACT OF WINE INGREDIENTS LABELLING ON A TRIED AND LIKED WINE – QUESTIONNAIRE STRUCTURE

All respondents

Respondents were asked to think about a wine they regularly buy and love drinking.

- Q2: favourite wine style (red wine / white wine / rosé wine)
- Q3: favourite wine perceptions / imagery (10 statements, using a 1-5 scale)

Respondents are informed that the back label shows the wine's ingredients.
Each respondent has been randomly assigned to one of the three following scenarios:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients:
"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients:
"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

- Q4: changes in opinion (1 to 5 scale)
- Q5: changes in intent to buy (1 to 5 scale)
- Q6: changes in imagery (10 statements, 1 to 5 scales)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON OVERALL OPINION

On average, the disclosure of ingredients will drive down the opinion amongst 17% of consumers. This negative impact tends to be similar across the three formats of ingredients labelling.

Known and liked wine: impact of wine ingredients labelling on overall opinion

Question: Now knowing the ingredients it contains, does it change your opinion about this wine?
Base: all UK monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈330 per scenario)

	Average across the three lists	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***1,003***	*341*	*325*	*338*
No, it doesn't change my opinion at all	**21%**	17%	23%	21%
No, it doesn't change my opinion much	**31%**	29%	32%	32%
It may change my opinion, I am not sure	**31%**	37%	30%	28%
Yes, it gives me a lower opinion of it	**12%**	12%	11%	14%
Yes, it gives me a rather poor opinion of it	**5%**	5%	4%	5%
Total	**100%**	100%	100%	100%

% lower / rather poor opinion	**17%**	**17%**	**15%**	**20%**

Red / Blue : significantly higher / lower than 'Average across the 3 lists' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON INTENT TO BUY

The disclosure of ingredients for a favourite wine meant 9% of consumers would be unwilling to buy it again while 24% would hesitate.

Findings suggest that the negative impact is slightly lower for a short list (though differences are not statistically significant).

Known and liked wine: impact of wine ingredients labelling on intent to buy

Question: And how likely would you be to repurchase this wine in the future?
Base: all UK monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈330 per scenario)

	Average across the three lists	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***1,003***	*341*	*325*	*338*
I would definitely buy it again	**37%**	34%	41%	34%
I would probably buy it again	**31%**	27%	33%	33%
I would hesitate to buy it again	**15%**	18%	14%	12%
I would probably not buy it again	**5%**	6%	2%	7%
I would definitely not buy it again	**4%**	4%	4%	4%
I don't know / not sure	**9%**	11%	6%	10%
Total	**100%**	100%	100%	100%

% probably not buy / definitely not buy again	**9%**	**10%**	**6%**	**11%**

Red / Blue : significantly higher / lower than 'Average across the 3 lists' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

KNOWN AND LIKED WINE: IMPACT ON IMAGERY

Disclosing the list of ingredients on the back label has a slightly negative impact on quality perceptions. However, ratings stay quite high.

Known and liked wine: impact of wine ingredients labelling on imagery

Question: Now knowing the ingredients it contains, please indicate the extent to which you feel that each of the following statements are appropriate to describe your FAVOURITE wine on a 1 to 5 scale where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all UK monthly wine drinkers (randomly) assigned to one of the three scenarios (n≈330 per scenario)

% Appropriate / Very appropriate	Known and liked wine	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	*1,003*	*341*	*325*	*338*
A taste I like	92%	91%	87%	90%
Very good quality	88%	85%	81%	81%
A wine I am never disappointed with	86%	85%	83%	86%
Good value for money	83%	82%	80%	85%
A wine that I am proud to serve to my friends/family	81%	80%	76%	80%
A wine I enjoy for everyday drinking	77%	76%	77%	78%
Made by a producer that I trust	73%	72%	71%	76%
A wine produced with care	70%	67%	67%	68%
A wine that inspires confidence	56%	56%	61%	57%
A wine produced in an environmentally friendly way	42%	47%	46%	50%

Initial positive views tend to mostly shift towards neutral views (far more so than towards negative views).

Red / Blue : significantly higher / lower than 'Known and liked wine' (confidence interval: 95%)

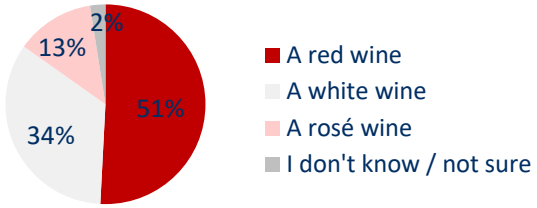
Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

KNOWN AND LIKED WINE: FINDINGS SUMMARY BY WINE TYPE PREFERENCE

Overall, the negative impact of ingredients labelling tends to be more or less similar across the three wine types.

Known and like wine: by wine type

Question: Please think about your FAVOURITE wine brand or producer, i.e. a wine that you regularly buy and that you love drinking. Is this wine:
Base: all UK monthly wine drinkers (n=1,003)



Overall opinion: % lower / rather poor opinion

	Average	Contains sulfites	Short list	Long list
Base:	***1,003***	*341*	*325*	*338*
Red	**19%**	18%	20%	20%
White	**14%**	14%	8%	20%
Rosé	**16%**	15%	15%	20%
Average all styles	**17%**	**17%**	**15%**	**20%**

On average, the negative impact of ingredients labelling is similar across the three styles. Though a short list will have a less negative impact for a white wine.

Intent to buy: % probably not buy / definitely not buy again

	Average	Contains sulfites	Short list	Long list
Base:	***1,003***	*341*	*325*	*338*
Red	**8%**	10%	5%	10%
White	**10%**	7%	9%	14%
Rosé	**11%**	15%	6%	11%
Average all styles	**9%**	**10%**	**6%**	**11%**

On average, the negative impact of a long list of ingredients is similar across the three colours.

Red / Blue : significantly higher / lower than 'Average all colours' (confidence interval: 95%) - Grey: small sample size (n<50)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine :
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY : IMPACT OF WINE INGREDIENTS LABELLING ON A NEW WINE – QUESTIONNAIRE STRUCTURE

We asked respondents to imagine they are in a shop and that they spot a wine that seems to match the type of wine they like to drink. Each respondent was randomly assigned to 1 of the 3 possible scenarios of back labels:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"



"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

Each respondent was shown either a **white** wine (≈50% of respondents) or a **red** wine (≈50% of respondents) back label.

Q7: new wine – consideration to buy (1 to 5 scale)

Q8: new wine – price range perception (scale ranging from 'very low end' to 'very high-end')

Q9: new wine – perceptions / imagery (8 statements, using a scale)

Note: back labels are shown in the appendix.

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

RED WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

Findings suggest that the shift from 'contains sulfites' to the full list of ingredients yields a slightly higher likelihood of trialling a new wine (note: differences are not statistically significant).

Red wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this wine?
Base: all UK monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***168***	*167*	*171*
I would consider / strongly consider buying it	**51%**	54%	58%
I may consider buying it	**29%**	28%	23%
I would probably not / definitely not consider buying it	**17%**	15%	15%
I don't know / not sure	**3%**	3%	4%
Total	**100%**	100%	100%

Net (% would buy - % would not consider buying)	**35%**	**39%**	**43%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

RED WINE BACK LABEL : IMPACT OF WINE INGREDIENTS LABELLING (2/3)

UK consumers express a counter-intuitive finding : they are more likely to perceive the bottle with a long list to be an high end wine, vs both other labelling formats.

Red wine back label: impact of ingredients labelling on price perceptions

Question: This wine is probably…
Base: all UK monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***168***	*167*	*171*
Very high-end	**2%**	5%	9%
High end	**30%**	26%	27%
Average	**51%**	56%	45%
Low end	**8%**	5%	8%
Very low-end	**3%**	0%	2%
I don't know / not sure	**6%**	8%	9%
Total	**100%**	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

RED WINE BACK LABEL : IMPACT OF WINE INGREDIENTS LABELLING (3/3)

The disclosure of ingredients (on top of 'contains sulfites') doesn't seem to significantly impact imagery.

Red wine back label: impact of ingredients labelling on wine imagery

Question: Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all UK monthly wine drinkers (randomly) assigned to one of the 3 possible red wine back labels (n≈160)

% Appropriate / Very appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base:	***168***	*167*	*171*
It probably tastes good	**76%**	75%	75%
A wine I would probably enjoy for everyday drinking	**69%**	66%	66%
A wine that seems to be produced with care	**62%**	65%	62%
It probably is of high quality	**57%**	57%	52%
A wine I would probably be proud to serve to friends	**56%**	62%	63%
It probably is an ordinary wine	**51%**	44%	53%
A wine that is probably produced in an environmentally friendly way	**49%**	43%	45%
It inspires confidence	**44%**	49%	54%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

Findings suggest that the shift from 'contains sulfites' to a short list of ingredients increases the willingness to trial a new white wine (note : differences are not statistically significant). Conversely, a long list may drive consideration to buy slightly down.

White wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this wine?
Base: all UK monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	***173***	*159*	*167*
I would consider / strongly consider buying it	**54%**	60%	50%
I may consider buying it	**28%**	23%	28%
I would probably not / definitely not consider buying it	**16%**	12%	19%
I don't know / not sure	**2%**	4%	3%
Total	**100%**	100%	100%

Net impact (% would buy - % would not consider buying)	**38%**	**48%**	**31%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (2/3)

The format of the wine ingredients list doesn't significantly impact the perceived price of a wine.

White wine back label: impact of ingredients labelling on price perceptions

Question: This wine is probably…
Base: all UK monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈160)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	***173***	*159*	*167*
Very high-end	**3%**	6%	4%
High end	**30%**	30%	29%
Average	**56%**	55%	55%
Low end	**4%**	2%	7%
Very low-end	**2%**	2%	0%
I don't know / not sure	**5%**	6%	5%
Total	**100%**	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

WHITE WINE BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (3/3)

As for perceived value, the disclosure of full ingredients labelling doesn't impact much perceptions of unknown white wine.

White wine back label: impact of ingredients labelling on wine imagery

Question: Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all UK monthly wine drinkers (randomly) assigned to one of the 3 possible white wine back labels (n≈160)

% Appropriate / Very appropriate	**Contains sulfites**	Short list of wine ingredients	Long list of wine ingredients
Base:	***173***	*159*	*167*
It probably tastes good	**74%**	77%	74%
A wine that seems to be produced with care	**69%**	62%	66%
A wine I would probably enjoy for everyday drinking	**67%**	63%	68%
A wine I would probably be proud to serve to friends	**63%**	61%	67%
It probably is of high quality	**59%**	57%	62%
It probably is an ordinary wine	**50%**	44%	51%
It inspires confidence	**48%**	54%	54%
A wine that is probably produced in an environmentally friendly way	**46%**	43%	50%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

CONTENTS

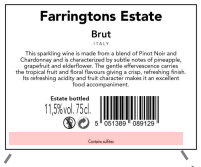
1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

METHODOLOGY: IMPACT OF WINE INGREDIENTS LABELLING ON A NEW SPARKLING WINE – QUESTIONNAIRE STRUCTURE

Respondents were asked to imagine they are in a shop and that they spot a wine that seems to match the type of sparkling wine they like to drink. Each respondent is (randomly) shown one of the 3 possible **sparkling wine** back labels:

Scenario 1 (≈1/3 of respondents)

"Contains sulfites"



"Contains sulfites"

Scenario 2 (≈1/3 of respondents)

Short list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (L-ascorbic acid)"

Scenario 3 (≈1/3 of respondents)

Long list of ingredients



"Ingredients: grape 99%, preservative (sulfites), antioxidant (tannins, L-ascorbic acid), acidity regulator (calcium sulphate), stabilizer (metatartaric acid, yeast mannoproteins)"

- Q10: new wine – consideration to buy (1 to 5 scale)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

SPARKLING WINE: IMPACT OF INGREDIENTS LABELLING

A long list of ingredients will make consumers to shift towards more neutral grounds. And findings suggest that a short may actually improve the consideration to buy an unknown white wines (note : differences are not statistically significant).

Sparkling wine back label: impact of ingredients labelling on consideration to buy

Question: To what extent would you consider buying this sparkling wine?
Base: all UK monthly wine drinkers (randomly) assigned to one of the 3 possible sparkling wine back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base:	*341*	*325*	*338*
I would consider / strongly consider buying it	43%	50%	40%
I may consider buying it	27%	25%	34%
I would probably not / definitely not consider buying it	28%	22%	24%
I don't know / not sure	2%	4%	2%
Total	100%	100%	100%
Net impact (% consider - % do not consider)	*16%*	*28%*	*17%*

Rouge / Bleu : significativement supérieur / inférieur à 'Contient des sulfites' (indice de confiance : 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

SPECIFIC WINE INGREDIENTS ACCEPTANCE: METHODOLOGY

We asked respondents to imagine they are in a shop and that they spot a wine that seems to match the type of wine they like to drink. Each respondent is (randomly) assigned to one of the two following scenarios:

Scenario 1 (≈50% of respondents)

Respondents are exposed to a list of ingredients, with no information.

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)
- Tartaric acid
- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate

Scenario 2 (≈50% of respondents)

Respondents are exposed to the same list but with short explanations.

Ingredients used to better preserve the wine:

- L-ascorbic acid
- Potassium sorbate
- Dimethyldicarbonate (DMDC)

Ingredients used to better maintain the quality of the wine (stabilise it and / or regulate its level of acidity):

- Malic acid
- Lactic acid
- Calcium sulphate
- Citric acid
- Tannins
- Gum arabic
- Metatartaric acid
- Yeast mannoproteins
- Carboxymethylcellulose
- Potassium polyaspartate
- Tartaric acid

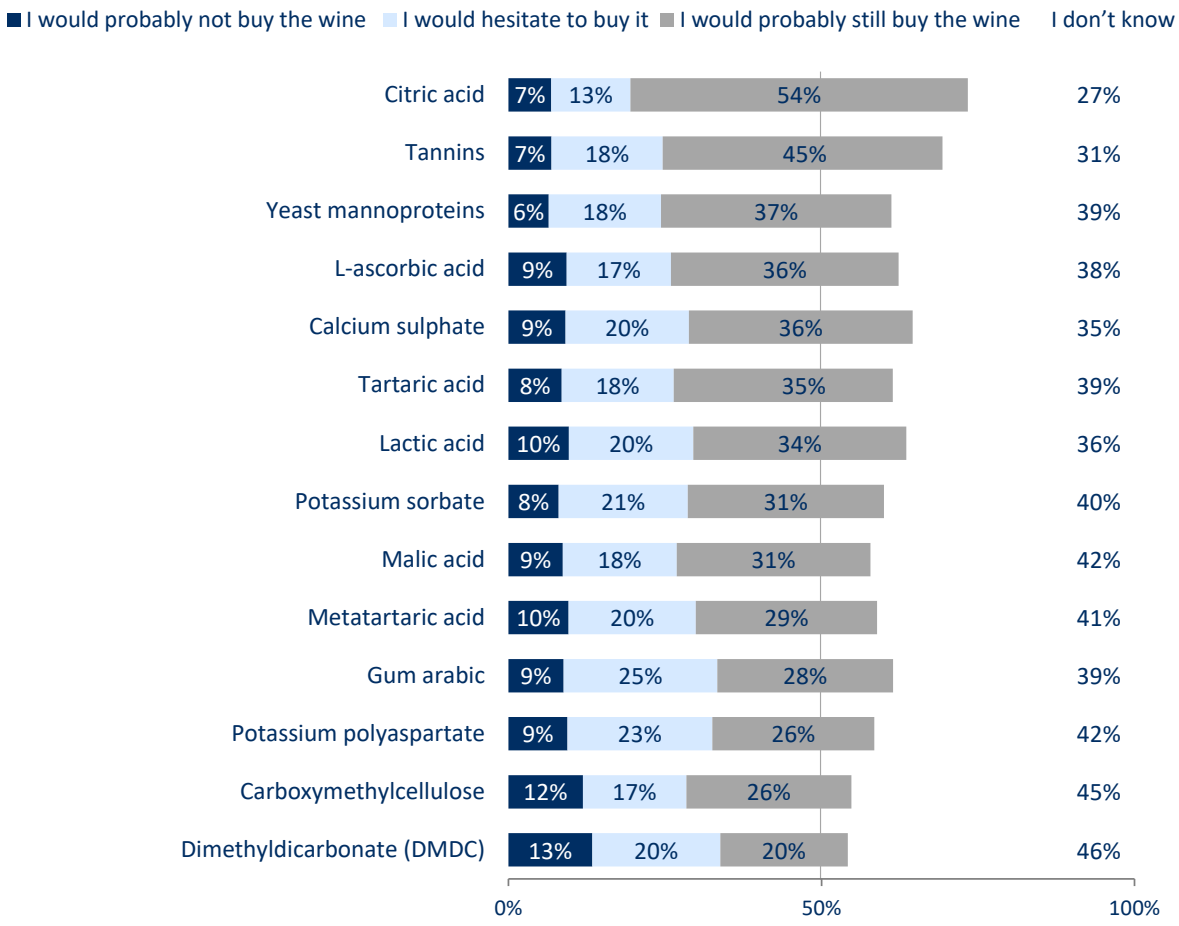
Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

ACCEPTANCE OF SPECIFIC INGREDIENTS: WITHOUT INFORMATION

Citric acid is the most accepted ingredient, ahead of tannins (respect. 54% and 45% of acceptance). Other ingredients mostly yield either acceptance or uncertain views, far more than outright rejection.

Acceptance of specific wine ingredients: without information

Question: For each of these ingredients, what would your reaction be? Base : all UK monthly wine drinkers (randomly) assigned to the scenario ' No information' (n=494)



	Average scores
Base:	*494*
% 'Still buy'	33%
% 'Hesitate'	19%
% 'Not buy'	9%
% 'Don't know'	38%

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

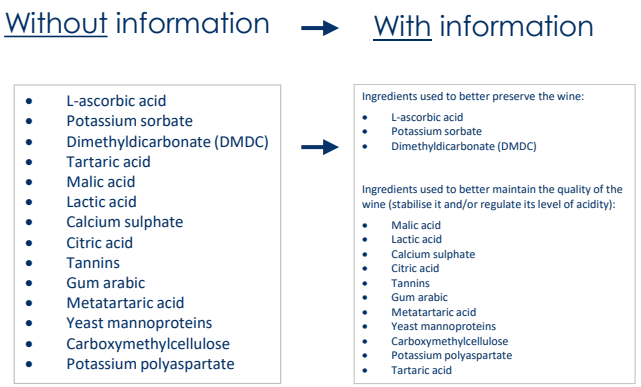
ACCEPTANCE OF SPECIFIC INGREDIENTS: IMPACT OF EDUCATION

Providing a short explanation on why an ingredient is used significantly helps to reassure consumers. Overall, it improves the rate of acceptance by about +10 pts on average.

Acceptance of specific wine ingredients: impact of education

Question: For each of these ingredients, what would your reaction be?
Base: all UK monthly wine drinkers (randomly) assigned to the scenario ' Short explanation' (n=509)

	% I would probably not buy the wine	% I would hesitate to buy it	% I would probably still buy the wine	% I don't know / not sure
Citric acid	ns	ns	ns	ns
Tannins	ns	ns	+9 pts	ns
Yeast mannoproteins	ns	ns	+12 pts	-7 pts
L-ascorbic acid	-5 pts	ns	+14 pts	-11 pts
Calcium sulphate	-5 pts	ns	+8 pts	ns
Tartaric acid	-4 pts	ns	+8 pts	-6 pts
Lactic acid	ns	ns	+9 pts	ns
Potassium sorbate	ns	ns	+12 pts	-10 pts
Malic acid	-4 pts	ns	+8 pts	-7 pts
Metatartaric acid	-4 pts	ns	+8 pts	ns
Gum arabic	ns	ns	+11 pts	ns
Potassium polyaspartate	ns	ns	+10 pts	ns
Carboxymethylcellulose	-5 pts	+7 pts	ns	ns
Dimethyldicarbonate (DMDC)	-6 pts	ns	+16 pts	-12 pts



ns = not significant

Red / Blue : significantly higher / lower than 'Without information' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices

CONCLUSIONS: KEY TAKEAWAYS

- Most consumers don't reject the idea of using additives in the winemaking process.

  Most either recognise or are neutral regarding the presence of additives in wines. Similarly, they will mostly be neutral (less often agree) regarding its usefulness in the winemaking process.

- However, 46% believe that good quality wines don't need additives and 37% express concerns regarding the impact on their health. Providing reassurance on both counts are key points to consider.

- The disclosure of ingredients of a known and trusted wine produces uncertainty than rejection.

  9% of consumers state they would stop buying the wine and **36% would hesitate**. The disclosure of wine ingredients yields a modest decrease in imagery perceptions though ratings remain quite high. A short list of ingredients is preferable to a long one.

- The full disclosure of ingredients doesn't seem to impact much on an unknown red wine

  Shifting from 'contains sulfites' to the full list of ingredients doesn't seem to significantly impact the consideration to buy an unknown red wine.

- The full disclosure of ingredients doesn't seem to impact much on an unknown white wine

  Though findings suggest that shifting from 'contains sulfites' to a **short list** of ingredients improves the willingness to trial this type of wine (note: differences are not statistically significant). A reverse effect is suggested for a long list.

- Regarding specific ingredients, **citric acid** and **tannins** are the most accepted. On average, the most common reaction regarding ingredients is uncertainty (57% 'don't know / unsure') or acceptance (33%), more so than outright rejection. On average, **education** (i.e. explaining why ingredients are used) significantly increases the rate of acceptance of most ingredients.

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

CONTENTS

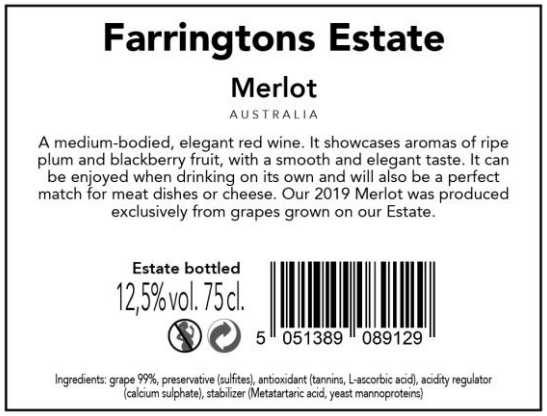
1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices
   - New wine: back labels shown to respondents
   - New wine: average findings (white + white wine merged)

APPENDIX : METHODOLOGY – TESTED BACK LABELS (STILL WINE)

Red wine back label:







White wine back label:





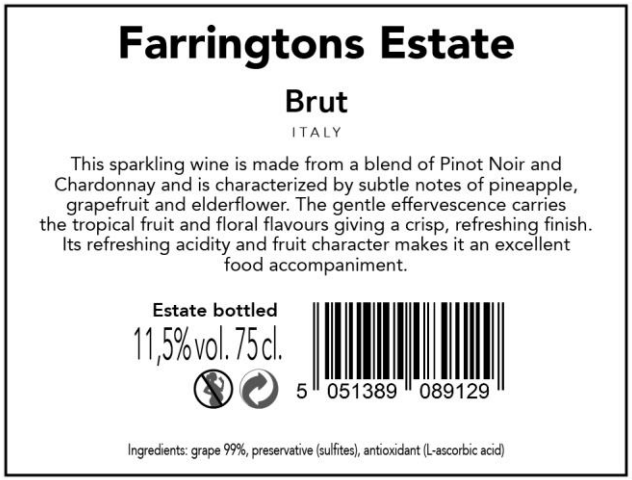


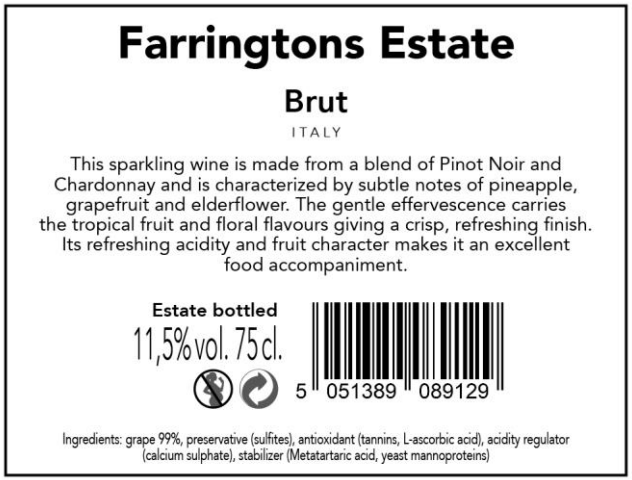
Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

APPENDIX : METHODOLOGY – TESTED BACK LABELS (SPARKLING WINE)

Sparkling wine back label:







Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

CONTENTS

1. Objectives and methodology
2. Wine making perceptions and knowledge
3. Impact of wine ingredients labelling on a tried (and liked) wine
4. Impact of wine ingredients labelling on trialling a new wine:
   - Red wine
   - White wine
   - Sparkling wine
5. Level of acceptance for specific wine ingredients
6. Conclusions
7. Appendices
   - Trialling a new wine: back labels shown to respondents
   - Trialling a new wine: average findings (white + white wine merged)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (1/3)

Still (white + red) wine back label: impact of ingredients labelling on consideration to buy

Question : To what extent would you consider buying this wine?
Base: all UK monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*341*	*325*	*338*
I would consider / strongly consider buying it	52%	57%	54%
I may consider buying it	28%	26%	26%
I would probably not / definitely not consider buying it	17%	14%	17%
I don't know / not sure	3%	3%	3%
Total	100%	100%	100%

Net impact (% would buy - % would not consider buying)	**36%**	**43%**	**37%**

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING (2/3)

Still (white + red) wine back label : impact of ingredients labelling on price perceptions

Question : This wine is probably…
Base: all UK monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*341*	*325*	*338*
Very high-end	3%	6%	6%
High end	30%	28%	28%
Average	53%	55%	50%
Low end	6%	3%	7%
Very low-end	2%	1%	1%
I don't know / not sure	5%	7%	7%
Total	100%	100%	100%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (1/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% appropriate / very appropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all UK monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% Appropriate / Very appropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*341*	*325*	*338*
It probably tastes good	75%	76%	74%
A wine I would probably enjoy for everyday drinking	68%	65%	68%
A wine that seems to be produced with care	66%	64%	64%
A wine I would probably be proud to serve to friends	60%	61%	64%
It probably is of high quality	58%	57%	57%
It probably is an ordinary wine	50%	44%	52%
A wine that is probably produced in an environmentally friendly way	48%	43%	47%
It inspires confidence	46%	52%	54%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (2/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% neither appropriate not inappropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all UK monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% Neither appropriate nor inappropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*341*	*325*	*338*
It probably tastes good	15%	14%	17%
A wine I would probably enjoy for everyday drinking	16%	21%	20%
A wine that seems to be produced with care	23%	22%	24%
A wine I would probably be proud to serve to friends	22%	25%	23%
It probably is of high quality	26%	27%	28%
It probably is an ordinary wine	31%	34%	28%
A wine that is probably produced in an environmentally friendly way	33%	38%	30%
It inspires confidence	36%	33%	33%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (3/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% not / not at all appropriate)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all UK monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% Not appropriate / Not at all appropriate	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*341*	*325*	*338*
It probably tastes good	4%	4%	4%
A wine I would probably enjoy for everyday drinking	11%	9%	8%
A wine that seems to be produced with care	3%	4%	4%
A wine I would probably be proud to serve to friends	9%	5%	6%
It probably is of high quality	8%	6%	7%
It probably is an ordinary wine	12%	14%	15%
A wine that is probably produced in an environmentally friendly way	7%	5%	8%
It inspires confidence	10%	7%	7%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (4/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

(% I don't know / not sure)

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all UK monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

% I don't know / not sure	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*341*	*325*	*338*
It probably tastes good	6%	6%	5%
A wine I would probably enjoy for everyday drinking	5%	6%	5%
A wine that seems to be produced with care	7%	10%	8%
A wine I would probably be proud to serve to friends	9%	8%	6%
It probably is of high quality	8%	10%	8%
It probably is an ordinary wine	6%	8%	6%
A wine that is probably produced in an environmentally friendly way	13%	14%	15%
It inspires confidence	8%	9%	5%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

Source: Wine Intelligence for Oenoppia, Wine consumers' perceptions and reactions towards ingredients labelling, April 2021 | Market: UK (n=1003 wine drinkers)

APPENDIX - STILL WINE (RED + WHITE) BACK LABEL: IMPACT OF WINE INGREDIENTS LABELLING ON IMAGERY (5/5)

Still (white + red) wine back label: impact of ingredients labelling on imagery

Question : Still thinking about the same wine that you've never tried but seems to match the kind of wines you love drinking. Based on this label information, please indicate to what extent do you feel that the following statements are appropriate to describe this wine on a scale of 1 to 5 where 1 = "not at all appropriate" and 5 = "very appropriate".
Base: all UK monthly wine drinkers (randomly) assigned to one of the three back labels (n≈330)

Net impact (positive - negative)	Contains sulfites	Short list of wine ingredients	Long list of wine ingredients
Base :	*341*	*325*	*338*
It probably tastes good	71%	72%	70%
A wine I would probably enjoy for everyday drinking	57%	56%	60%
A wine that seems to be produced with care	63%	60%	60%
A wine I would probably be proud to serve to friends	51%	56%	58%
It probably is of high quality	51%	51%	50%
It probably is an ordinary wine	38%	29%	38%
A wine that is probably produced in an environmentally friendly way	41%	38%	40%
It inspires confidence	36%	45%	47%

Red / Blue : significantly higher / lower than 'Contains sulfites' (confidence interval: 95%)

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