

Wine avoiders in five countries: potential for adopting wine as an alcoholic beverage of choice

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Researchers deliver the final results of their study into wine avoiders across Australia, US, UK, Canada and India, including some interesting findings on the number of avoiders within each country.

Charles Sturt University has been conducting a study in five countries on more than 4000 'wine avoiders'; that is, people who consume alcohol but choose not to drink wine. There are varied reasons why consumers choose to avoid wine and these will be reported in detail in various forums as data is analysed further.

The purpose of this article is straightforward: to report on the percentage of people who are classified as 'wine avoiders' across a spectrum of wine countries. This is important, since an avoider of wine in this context potentially represents a new customer to the wine industry, rather than a customer who has been taken from a competitor, or worse, another brand (i.e., commonly termed product cannibalisation). If the percentage of avoiders is considerable, then this represents a platform to potentially substantially increase wine sales in a sustainable way, and to expose more consumers to the joys of experiencing wine.

STUDY METHOD

Participants of legal drinking age were recruited for completion of an online questionnaire in Australia, the United States, Canada and the United Kingdom as established markets, and India as an emerging market. The total sample, mean age (and standard deviation) are reported in Table 1, while the frequency of alcohol (as distinct from wine) consumption is reported in Figure 1. As expected, the established markets had a fairly similar distribution for frequency of consumption, with a large proportion of consumers reporting drinking several times a week, thus reflecting the well-known 20:80 phenomenon in

Alcohol consumption frequency (%)

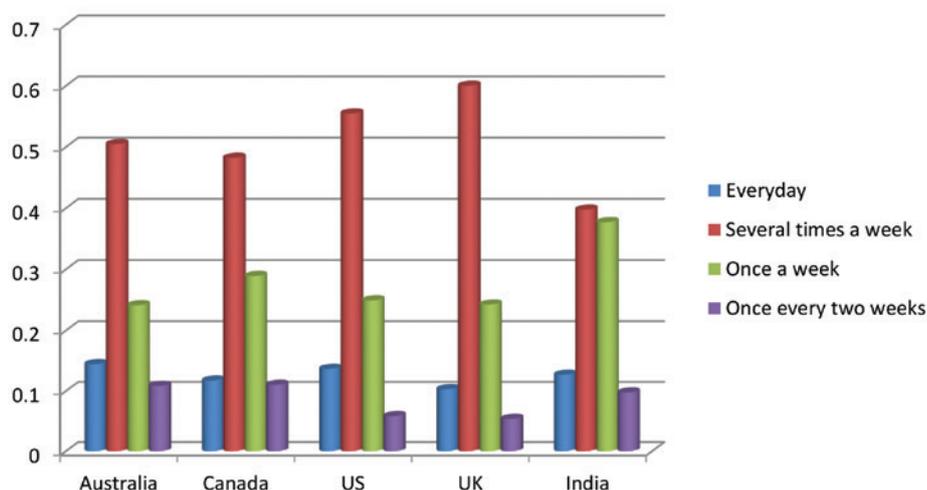


Figure 1.

marketing (20% of consumers account for 80%, or thereabouts, of a product's consumption). In India, on the other hand, distribution was more balanced across 'several times a week' and 'once a week'. The figure is standardised in order to show a fair comparison across countries where sample sizes differed.

RESULTS

For research purposes, wine avoiders were defined as those who consume wine at 0-5% of their total alcoholic beverage consumption. The 5% 'rule' takes into consideration any wine avoiders who may drink a

Table 1. Sample size for each country with mean age (standard deviation).

Country	N	Mean age in years (SD)
UK	1171	45.62 (13.30)
Australia	994	44.17 (13.37)
US	854	43.56 (13.03)
Canada	978	42.90 (12.61)
India	440	33.73 (8.99)
Total	4437	43.13 (13.15)

Results indicate that approximately 18-25% of alcohol consumers avoid wine across all the countries.

glass on a special occasion, such as sparkling wine at a wedding or if offered a glass of wine declines the offer. This definition was also informed by focus groups that were conducted in all of the countries. Wine consumers were defined as consuming wine at 6-100% of their total alcoholic beverage consumption. To validate the 5% 'rule' we measured the average number of standard wine drinks on a single occasion, comparing wine avoiders with wine consumers. The results are shown in Figure 2. For the Western countries the average for wine avoiders was less than half a standard drink. The results differed for India where 1.5 standard drinks of wine on average were consumed for those who consumed 5% or less wine of their total alcohol consumption. At first glance the results are surprising, however, when considering the responses from a previous focus group study conducted on wine avoiders in India (see Ovington, McIntyre, Saliba and Bruwer 2014) this result is less surprising. Indian participants in general enjoy wine and reported wine avoidance for different reasons. Overall the reasons included accessibility and not knowing how to purchase a genuine wine product (fake wines are common in India). With this in mind, Indians who consume little wine may still report consuming a couple of standard drinks on one occasion if having access to the product is possible. When these Indians consume wine, it is likely to be occasion-driven, i.e., birthday celebration, etc.

The percentage of wine avoiders was fairly similar for each country (see Figure 3). Results indicate that approximately 18-25% of alcohol consumers avoid wine across all the countries, averaging out to 21.3% of alcohol consumers who avoid wine. First, it was surprising to find that the percentage of wine consumers was similar across all the countries, including India. When examining the data closely, we can see that the overall consumption levels in India remain low compared with other countries. The consumption figures are based on alcohol consumers and it should not be forgotten that in some countries, the percentage of alcohol avoiders is relatively high, but that fact is not

Mean (Std Error) number of standard wine drinks on a single occasion

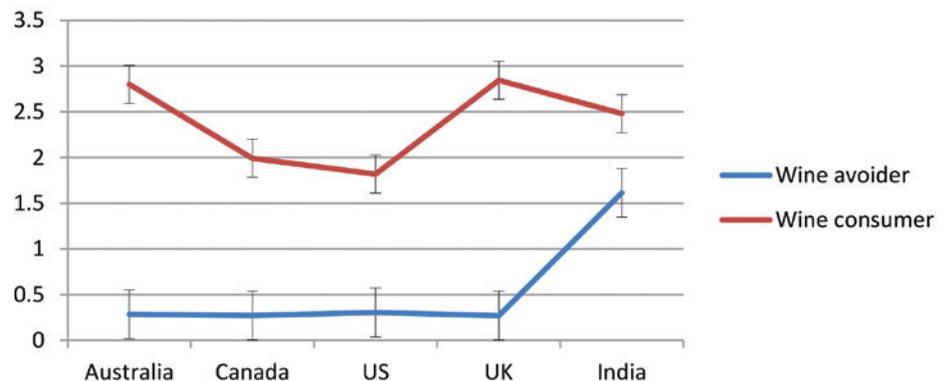


Figure 2.

Wine avoiders vs. consumers

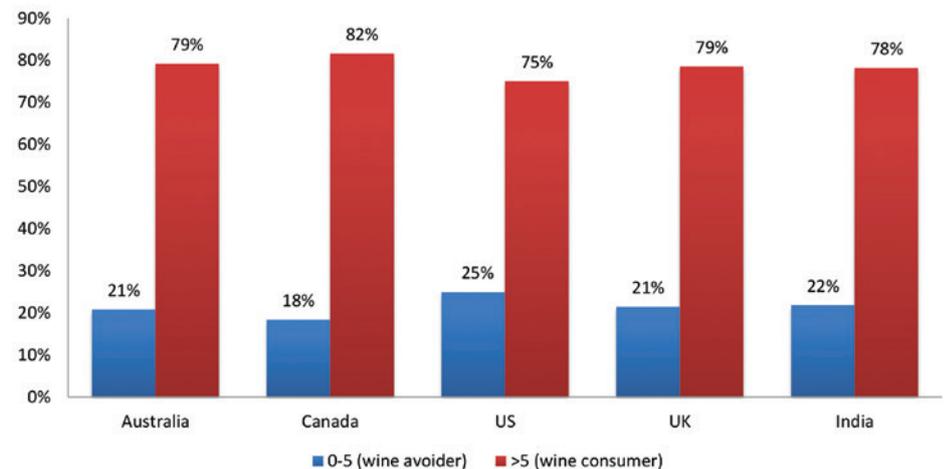


Figure 3.

reflected in the data reported here, since data is based on those who actually consume alcohol.

In order to give an estimate of the potential market size of 'new' wine consumers for each country, the percentage of adult alcohol consumers was obtained from relevant studies

(i.e., World Health Organisation). An estimation of the total numbers of wine avoiders was calculated from this figure. Results are reported in Table 2. Since the percentage of wine avoiders was relatively constant throughout the different countries (though the US was slightly higher

Table 2. Number of wine avoiders calculated by total number of alcohol consumers.

	No. of alcohol consumers	Wine avoiders %	Total number of wine avoiders
Australia	14,872,923	21.0	3,123,314
Canada	22,964,555	18.4	4,225,478
US	192,579,111	24.9	47,952,198
UK	45,934,567	21.4	9,829,997
India	265,283,861	21.8	57,831,877
Total			122,962,864

All countries tested contain a substantial proportion of wine avoiders, while some countries, due to their population size, represent enormous market potential for new wine consumers.

and Canada the lowest), the biggest impact on the total number of wine avoiders was the base population size. In India, this is somewhat misleading as there are studies that claim marked socioeconomic differences. That is, the more than 50 million potential new wine consumers reported in Table 2 for India may be inflated, as some alcohol consumers may not be able to afford wine as it tends to be higher in price than some other alcoholic beverages in that country. However, based on the current figures and given that Australia in 2014 exported 1 million litres of wine to India at A\$3.7 million (Daily Wine News 2015), if the wine avoiders segment of 57 million people can be penetrated by, say, just 5% it could mean an increase of 215,000 litres exported to India at A\$796,000.

In the case of the developed wine markets, a total of 64 million potential

new wine consumers exists, with the US and the UK the largest contributors. Even in Australia, where an excellent framework to encourage new wine consumers exists, there remains more than three million people who could be introduced to the joys of experiencing wine as their chosen alcoholic beverage.

CONCLUSION

It is important to note that in this study we only polled consumers of alcohol. By doing this, all potential new wine consumers that we have identified are those who already choose to consume alcohol. We are not advocating that people start drinking wine where they currently avoid alcohol. Moreover, we are not advocating that consumers introduce wine into their diet at unsafe levels; instead, we suggest that the joys of experiencing wine could replace

currently consumed beverages such as beer or spirits. Our premise is socially responsible consumption levels of wine on a per country basis.

The results of this study show that all countries tested contain a substantial proportion of wine avoiders, while some countries, due to their population size, represent enormous market potential for new wine consumers. Why people avoid wine and, therefore, what the wine industry can do to address these consumers' requirements will be the topic of future reports from this study.

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