



30.31 JANVIER / 1ER FÉVRIER 2023
MONTPELLIER
PARC EXPO

Millésime BIO



MONDIAL DU VIN ET DES AUTRES BOISSONS ALCOOLISÉES BIOLOGIQUES

**How do wine consumers perceive
organic and sustainable endorsements?**

(Millésime BIO – CSA survey)

Mardi 31 Janvier 2023

ISSUE

- Increase in organic and sustainable endorsements
 - Investigate awareness and trust generated by the different endorsements
 - Understand organic's place in the endorsement arena: an outmoded or a benchmark endorsement?

- The need for an appraisal at international level
 - Identify any specific national characteristics
 - Ascertain whether some endorsements, including organic, are now part of 'European awareness'

METHODOLOGY

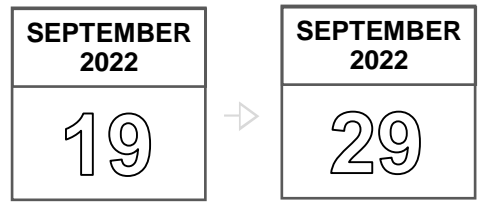


COLLECTION METHOD

Self-administered online survey among internet users from the CSA proprietary general public panel

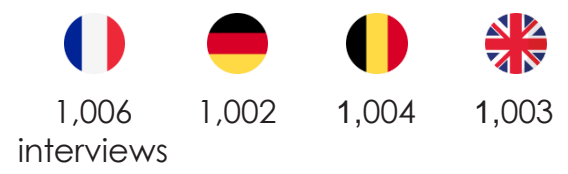


FIELD DATES



AUDIENCE QUESTIONED

4 representative samples of wine consumers in each of the 4 following countries



Within these samples, what is the significance of organic wine consumers?



ENDORSEMENTS: WHAT ARE WE REFERRING TO?

Organic endorsements



- Non-use of synthetic chemicals.
- Annual inspection by an independent body
- Certification after three years

Endorsements that are complementary to organic

They take organic specifications a stage further



ENDORSEMENTS: WHAT ARE WE REFERRING TO?

Non organic endorsements and statements

- They do not incorporate organic specifications
- So they authorise synthetic chemicals



- part 1 -

AWARENESS OF THE DIFFERENT ENDORSEMENTS

In this part, we present the results both as **groups of endorsements/logos/statements within the major categories** and in detailed form with a **focus on some endorsements**.

INTERPRETATION

Groups of endorsements/logos/statements within the major categories

ORGANIC



SUSTAINABLE



CSR



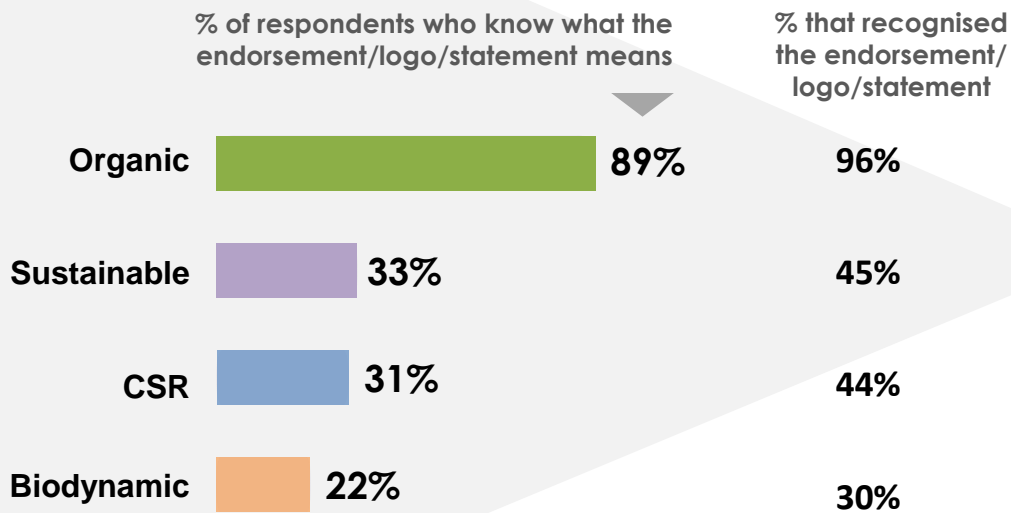
BIODYNAMIC



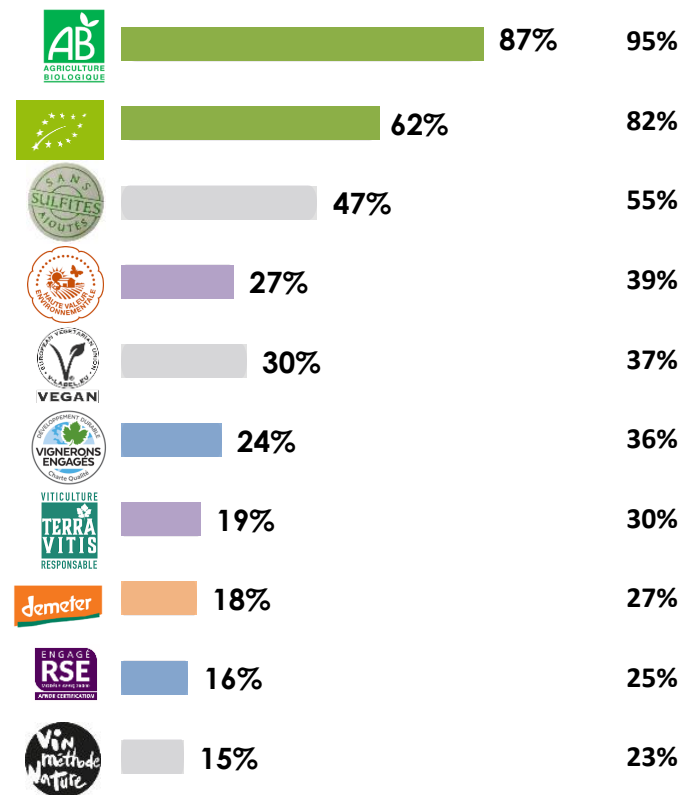
AWARENESS: THE BEST KNOWN OR RECOGNISED ORGANIC ENDORSEMENTS

 Basis: All French respondents

Groups of endorsements/logos/statements within the major categories



TOP 10 endorsements/logos/statements tested



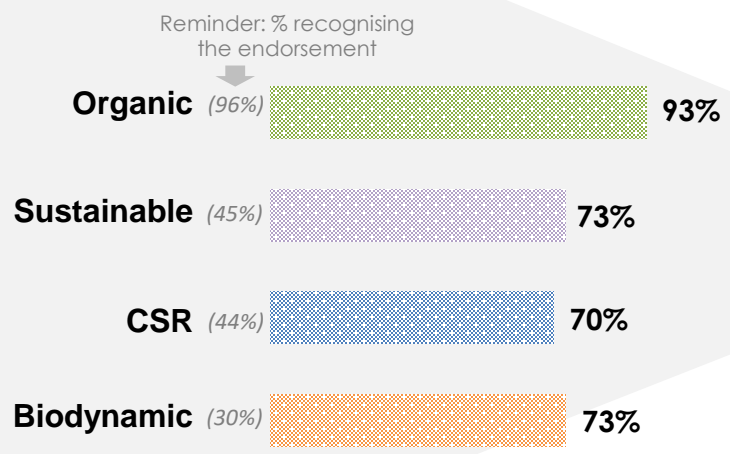
AWARENESS: THE BEST KNOWN AND ALSO BEST UNDERSTOOD ORGANIC ENDORSEMENTS



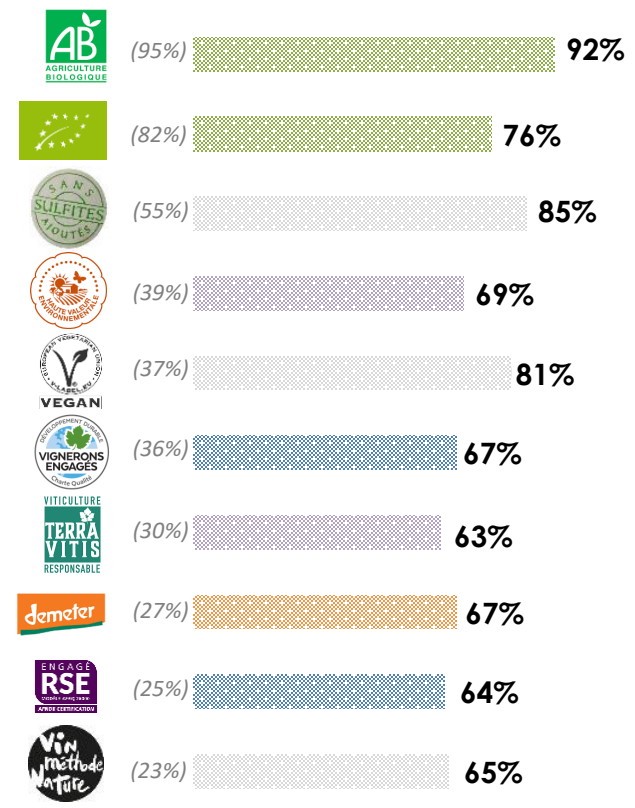
Basis: All French respondents
 % of respondents who know what the endorsement/logo/statement means
 VS % respondents who recognise the endorsement

TOP 10 endorsements/logos/statements tested

Groups of endorsements/logos/statements within the major categories



Interpretation:
 93 % of French consumers who recognised an organic endorsement know what it means



AWARENESS: SPECIFIC NATIONAL CHARACTERISTICS

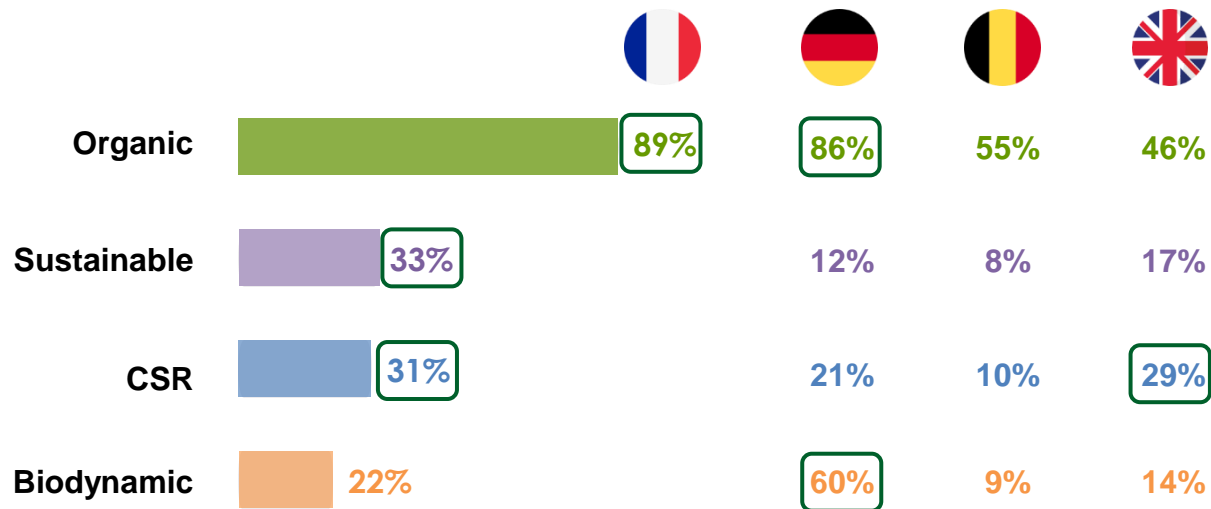
France: consumers are more aware of what organic means. Perhaps because it is a producer country?

Germany: a model student for organic and success of biodynamics. United Kingdom: less recognised/known endorsements!

Basis: All respondents

% of respondents who know what the endorsement/logo/statement means

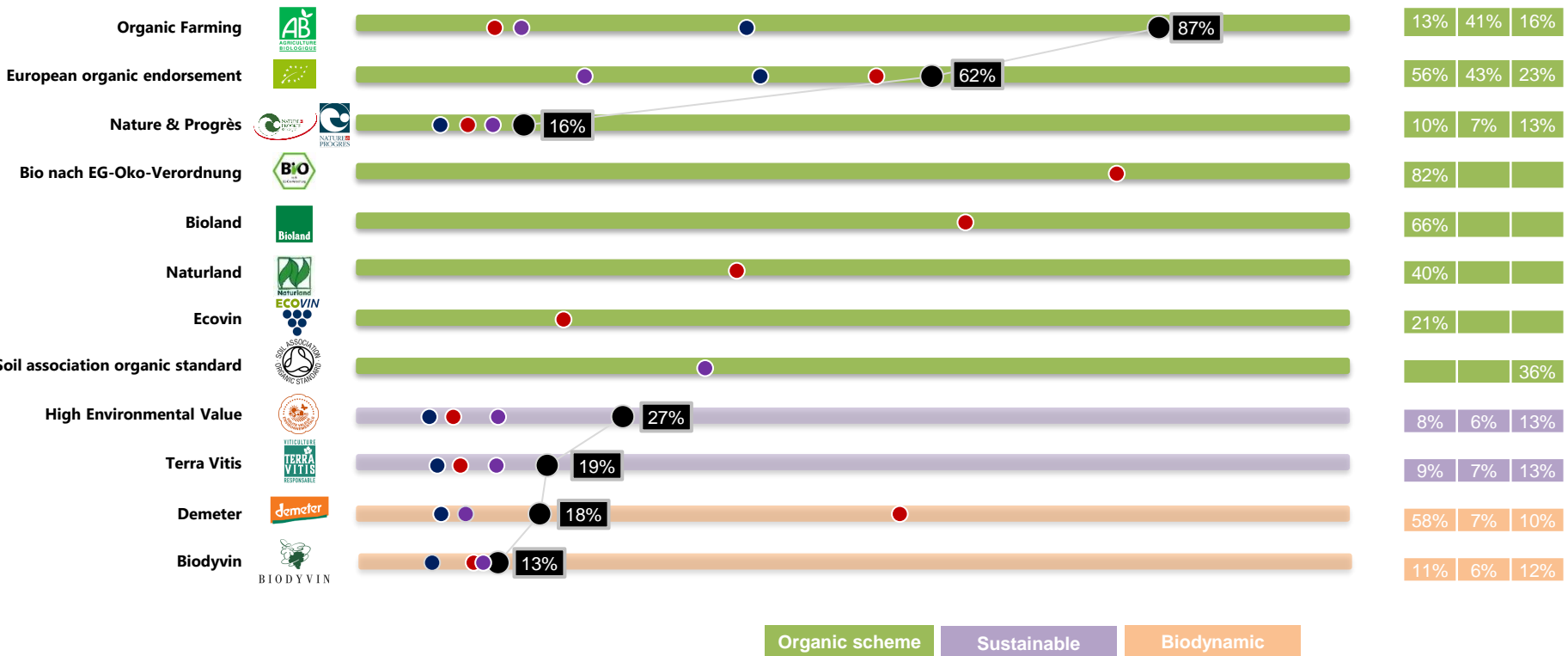
Groups of endorsements/logos/statements within the major categories



AWARENESS: SPECIFIC NATIONAL CHARACTERISTICS

Basis: All respondents

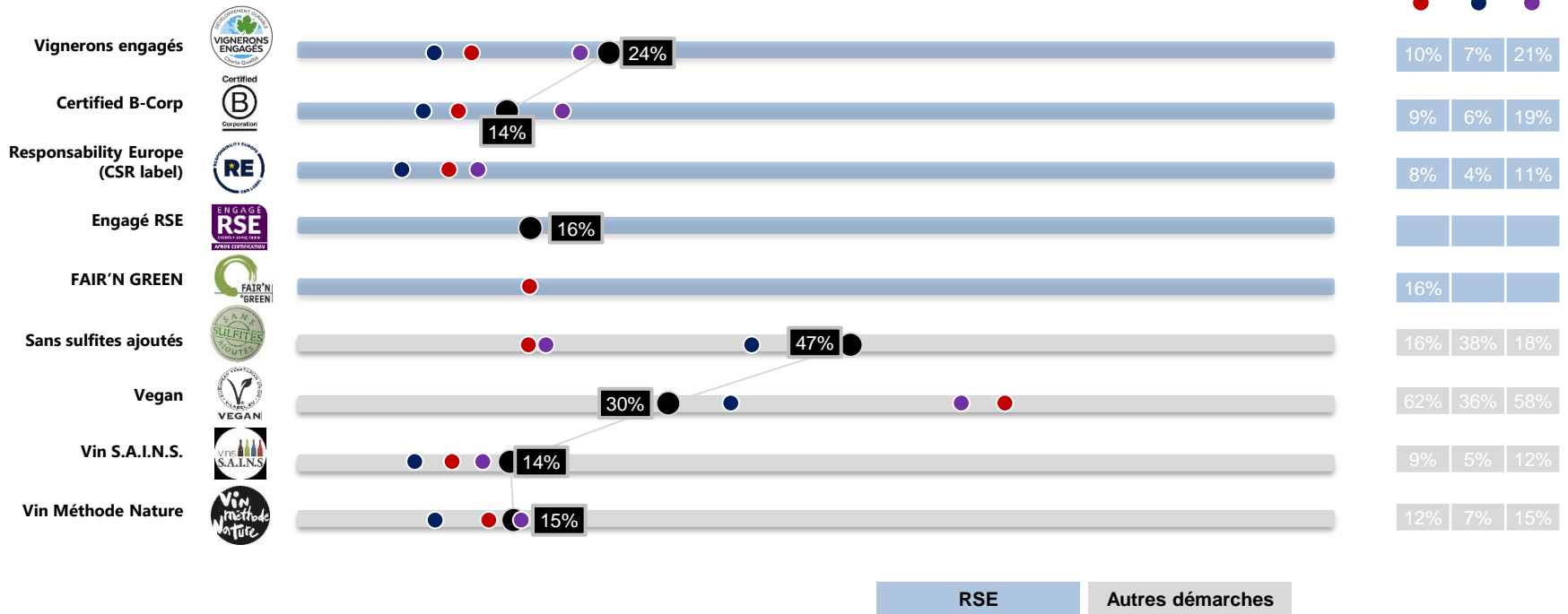
% of respondents who know what the endorsement/logo/statement means



AWARENESS: SPECIFIC NATIONAL CHARACTERISTICS

Basis: All respondents

% of respondents who know what the endorsement/logo/statement means



- part 2 -

TRUST GENERATED BY THE DIFFERENT ENDORSEMENTS

TRUST: IS ORGANIC THE MOST BENEFICIAL?

The organic endorsement ranks best for aspects involving the environment and health benefits. From ethics to respect for the environment, health and flavour and aroma quality, when the criteria are cross-referenced, it stands out among endorsements from a consumer viewpoint.

Basis: respondents who know what the endorsement means



PERCEPTION OF THE AB ENDORSEMENT

Aspects re-established based on several criteria

TOP 3

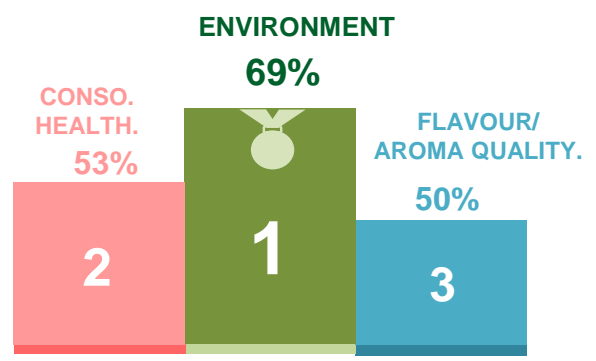
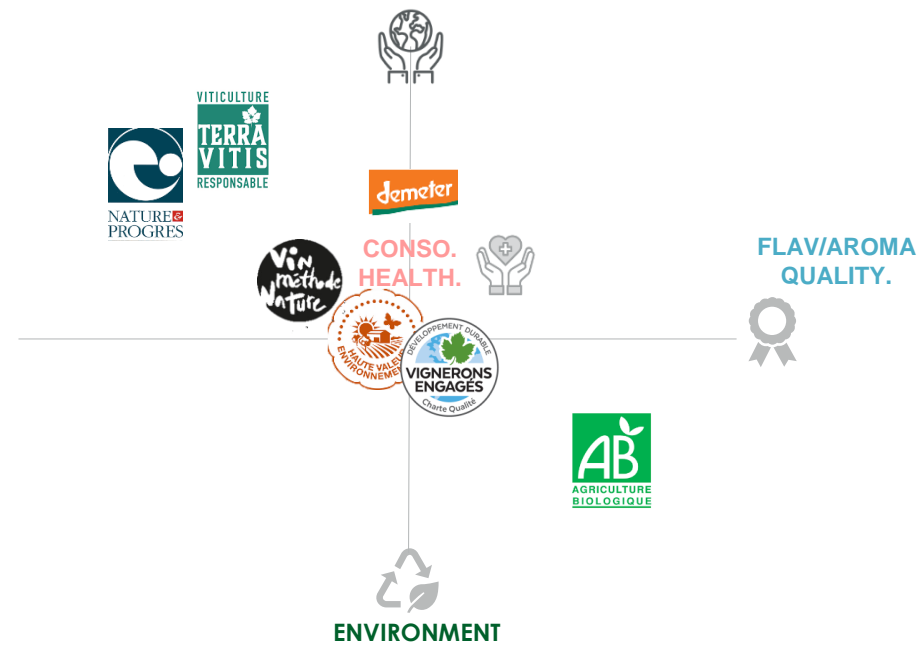


IMAGE AREA OF THE ENDORSEMENTS

RESPONSIBLE CONSUMPTION
SUPPORT FOR THE PRODUCER



TRUST: IS ORGANIC THE MOST BENEFICIAL?

Organic also conjures up values like professionalism and reliability because it undergoes stricter inspections.

Basis: respondents who know what the endorsement means



PERCEPTION OF THE ENDORSEMENTS

Selection of criteria $\geq 25\%$ for AB

A wine that is...

More natural because it is grown with no synthetic chemicals



48%



32%



26%



29%



46%



30%



33%

Able to protect the environment

41%

32%

31%

38%

34%

37%

29%

Subjected to stricter inspections

39%

22%

22%

25%

39%

26%

21%

Better for your health

29%

22%

20%

18%

20%

22%

23%

ENVIRONMENT

CONSO. HEALTH

FLAVOUR/AROMA QUALITY.

Xx% / Xx%: significant positive or negative differences vs the weighted average of the 7 endorsements

TRUST: IS ORGANIC THE MOST BENEFICIAL?

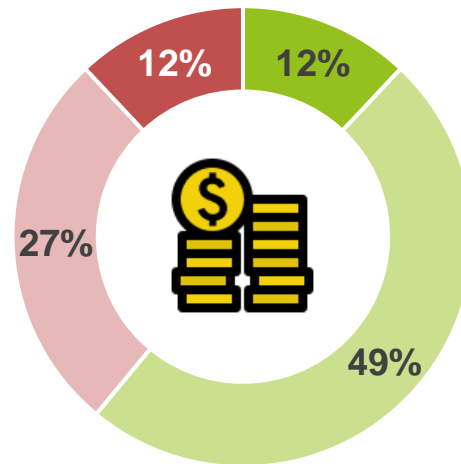
Ultimately, nearly two thirds of respondents feel that applying a higher price to an organic wine is justified

Basis: All respondents



Does a certified organic wine justify a higher price than a non-certified organic wine?

- Yes, absolutely
- Yes, relatively
- No, not really
- No, not at all



61 % of respondents feel that a higher price for an organically certified wine vs a non-certified wine is justified

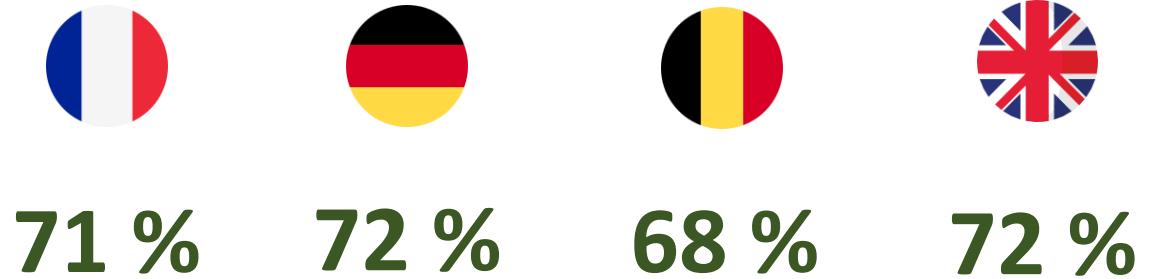
TRUST: IS ORGANIC EUROPEAN HERITAGE?

Organic endorsements build trust in wine for seven out of ten wine consumers. The level of trust in organic is relatively consistent among European countries.

Basis: respondents who know what organic endorsements mean



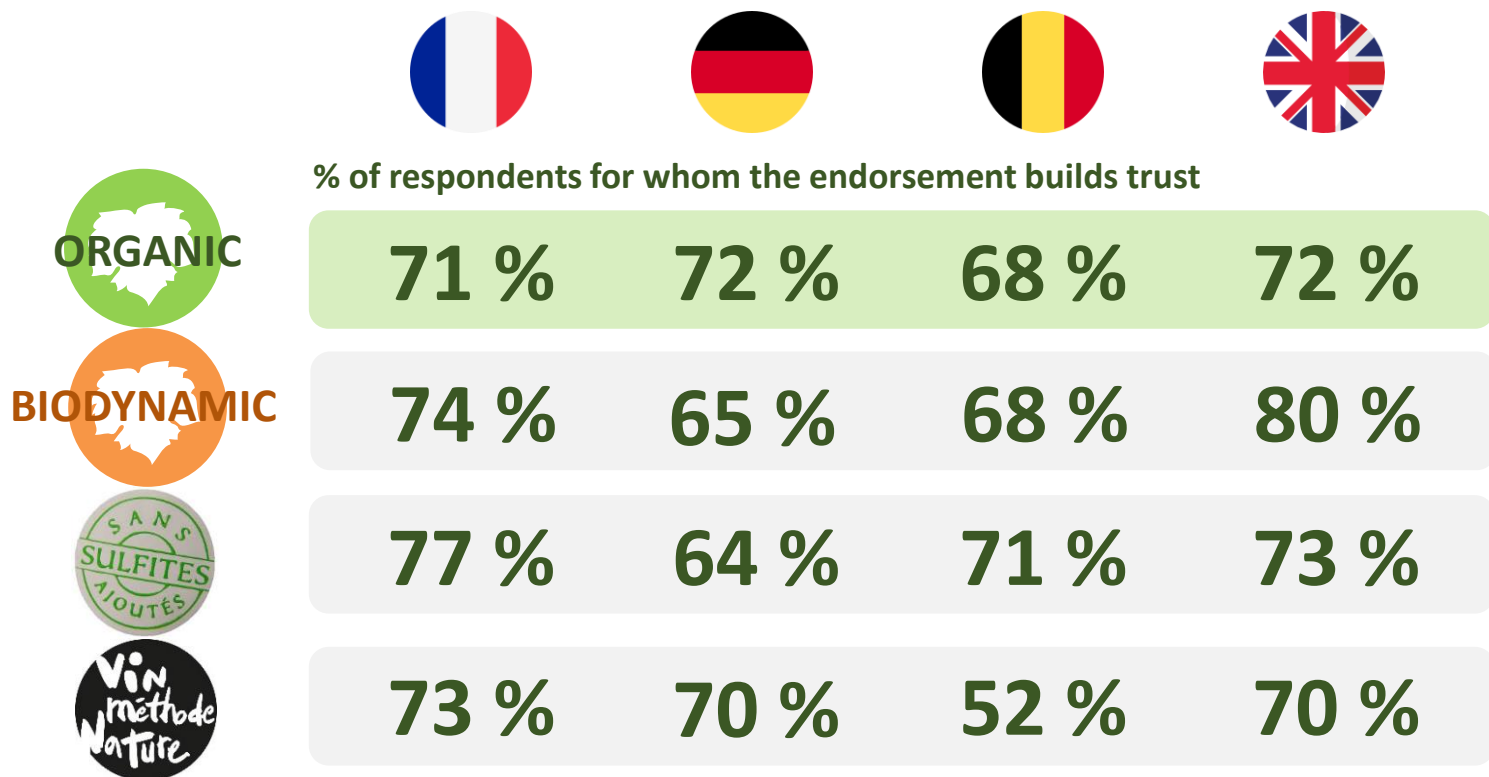
% of respondents for whom the endorsement builds trust



TRUST: IS ORGANIC THE NEW NORMAL?

Some endorsements/logos that are newer than organic endorsements, for example 'Sulphite-Free' or 'Natural Method Wine' generate as much trust. Is this because organic has become widely accepted, an obvious choice?

Basis: respondents who know what the organic endorsement(s) mean



- conclusion -

**ORGANIC AND OTHER
ENDORSEMENTS:
PRECEDENCE BUT ALSO
EXPECTATIONS**

ORGANIC AND OTHER ENDORSEMENTS: PRECEDENCE...

#1 Organic endorsements stand out

Stronger awareness

A sign of confidence for consumers.

#2 Organically certified wines stand out

Score well for environmental criteria

Are perceived as being submitted to stricter inspections, particularly in France

Organic is the benchmark endorsement for consumers.

**But education and awareness-building need to
continue.**

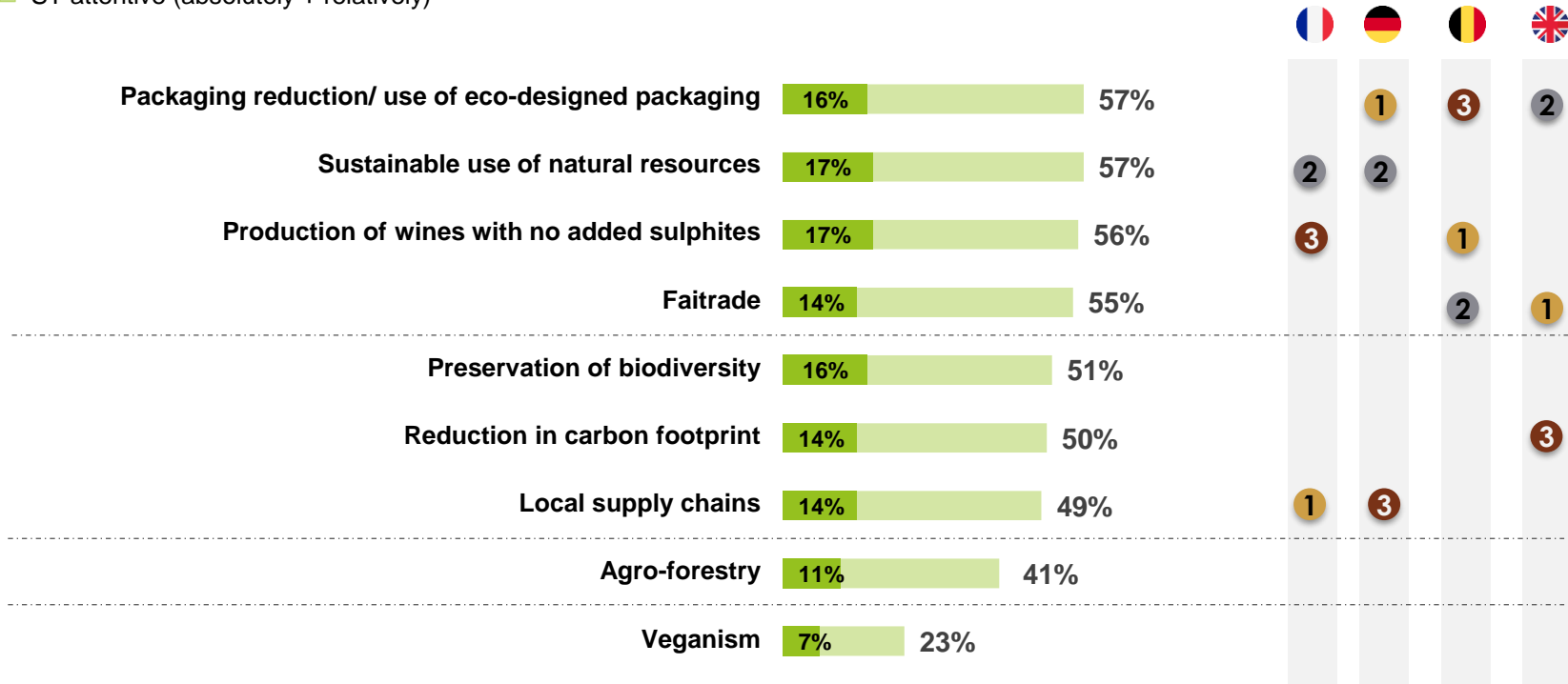
...BUT ALSO EXPECTATIONS

Consumer concerns pave the way for initiatives that complement organic farming

Basis: All respondents

Consideration given to initiatives that may be undertaken by the industry

- Absolutely attentive
- ST attentive (absolutely + relatively)



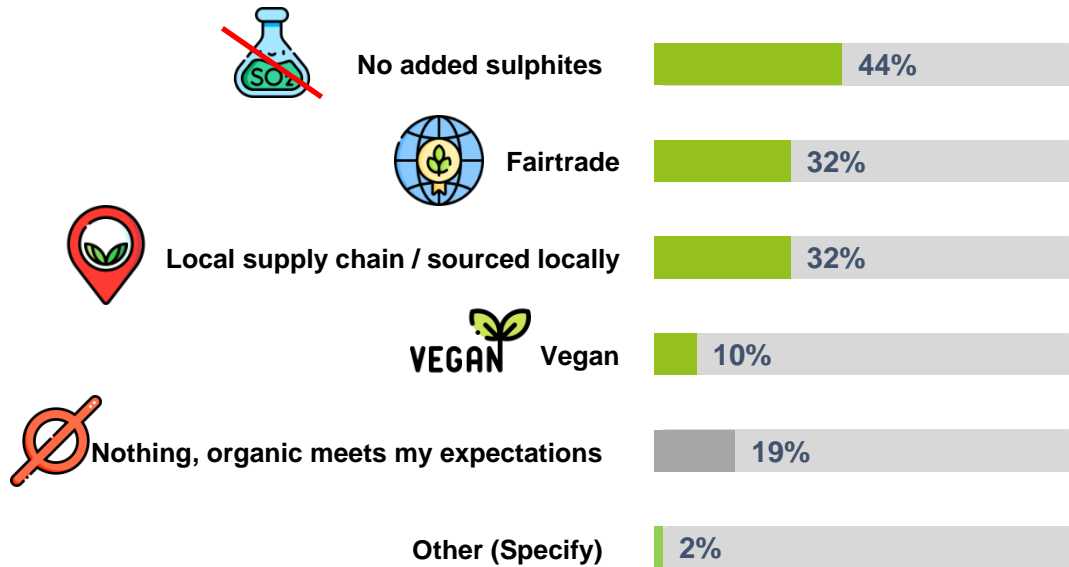
...BUT ALSO EXPECTATIONS

Consumer concerns pave the way for initiatives that complement organic farming

Basis: All respondents



In addition to organic, what are organic wine consumers looking for?



Thank-you for your
attention