RESULTS OF AN ON-LINE CONSUMER SURVEY
sponsored by the CONSUMER WINE AWARDS at LODI

BEVERAGE PREFERENCES
ATTITUDES AND BEHAVIOR OF ‘SWEET’ VS. ‘TOLERANT’ WINE CONSUMERS

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This report offers a brief overview of a survey of the preferences, attitudes, and behaviors of two groups of wine consumers ~ SWEET and TOLERANT ~ with wine stylistic preferences at the extreme ends of the spectrum of wine styles.

The data presented in this report come from an on-line survey conducted in conjunction with the CONSUMER WINE AWARDS at LODI.

Filters were created to cluster respondents who preferred sweet wine types versus those with a preference for more intensely styled red wines —the tolerants.

This report contains comparative charts demonstrating significant differences between ‘Sweet’ and Tolerant’ groups in:

- Gender
- Age
- Adult beverage consumption frequencies
- Adult beverage preferences by occasion (home, fine dining, social/bar)
- Wine selection confidence and attitudes
- Desirable characteristics (flavor descriptors)
- Preferences for wine by variety/type
- Beer style preferences

### SURVEY STATISTICS

Collection period: December 2009 — March, 2010
Total started survey: 1,597
Survey response total for this analysis: 1,485
‘Sweet’ respondents: 324
‘Tolerant’ respondents: 341
A FEW WORDS ABOUT TASTE (AND SMELL) SENSITIVITY AND WHY DIFFERENCES IN SENSITIVITY MATTER

What is taste?
Strictly speaking, taste is made up of the sensations coming from the mouth, and smell those from the nose, but our brains assign both taste and smell to the mouth. Therefore we commonly call the result "taste," though "flavor" may be the more correct term.

What is taste sensitivity?
Taste sensitivity refers to the intensity with which you perceive tastes and flavors. We differ considerably in what we each can taste and smell, and in how intense different tastes and smells are to us. People with high taste sensitivity experience tastes, and usually smells, too, as being very strong. They are also able to distinguish individual flavors in a mixture very well.

Is one taste sensitivity level better than another?
No! Greater (or lesser) sensory sensitivity does not make a person more expert or capable—just different.

Does taste sensitivity influence wine choice?
Yes!

Why does taste sensitivity influence wine choice?
The nerves that bring sensations from the nose and the mouth to our brain are closely linked to our emotional centers, our memory centers, and our centers for evaluation, judgment, and decision-making. Our taste sensitivity depends on the interactions of the taste and smell nerves with these centers in the brain. Consequently our experience of taste—and therefore our wine preferences—are affected by the strength of the taste signals coming from the mouth and smell signals from the nose, and also by life experiences, aspirations, family, culture, learning/education, peer dynamics, just to name a few important influences.

All of these influences can contribute to shifts in preferences, attitudes and behaviors, but the physiological starting point is your fundamental taste sensitivity.

A common misconception is that “one’s palate matures and becomes more sophisticated over time”. The reality is that little children are generally physiologically more sensitive than adults, and that taste (and smell) sensitivity decreases with time, more sharply in some people than in others, so that by the end of adolescence we reach a plateau. The level of this plateau varies from person to person, and can also drop over time, but normally at a very slow pace.

As we grow older, we accumulate our psychological experiences—these in turn modulate our experience of the taste of wine. However, their effect caries by our taste sensitivity.

Does this mean that wine professionals should expand their definition of high aspiration wine?
Absolutely! Because each level of taste sensitivity brings with it a different palate—and with each different palate a fresh gamut of possibilities for the appreciation of excellence in wine.

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We have identified four primary consumer groups, who span the spectrum of wine style preferences, from light & sweet to intense & red.
People who like **sweeter** wines are more likely to be **female** and **younger**.

People who are **tolerant** are more likely to be **male** and **older**.
Respondents in the Sweet group drink wine far less often than do Tolerants.

Percent of respondents consuming wine at each frequency for each taste group.
People who like sweeter wines are more likely than Tolerants to drink beer and cocktails at home.

By contrast, Tolerants overwhelmingly choose wine to drink at home.

Percent of each group with each answer to:
When you are at home what is your primary choice for an adult beverage?
When you dine out at a fine restaurant what is your primary choice for an adult beverage?

When you are dining out or are at a bar or non-dining social function/party what is your primary choice for an adult beverage?

While Tolerant respondents when dining at a fine restaurant choose wine almost exclusively, nearly one in five respondents in the Sweet group order cocktails. The Sweet group’s preference for cocktails is even more marked at bars and non-dining social functions.
The sweet group tends to be more conservative, tentative, or free and easy and less adventurous about their wine choices, and very much less passionate.

Percent of each group with each answer to:
Which of the following best describes your attitude toward selecting wines?

<table>
<thead>
<tr>
<th>Attitude</th>
<th>Sweet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drink anything</td>
<td>10</td>
</tr>
<tr>
<td>Conservative</td>
<td>2</td>
</tr>
<tr>
<td>Tentative</td>
<td>7</td>
</tr>
<tr>
<td>Free and Easy</td>
<td>15</td>
</tr>
<tr>
<td>Adventurous</td>
<td>31</td>
</tr>
<tr>
<td>Passionate</td>
<td>9</td>
</tr>
<tr>
<td>Don’t put me in a bucket</td>
<td>5</td>
</tr>
</tbody>
</table>

Could the ‘Sweet’ group’s passion for wine be ignited if sweeter wines were more acceptable and more available?
Could the ‘Sweet’ group become more comfortable with wines if sweeter wines were more acceptable and more available?

Percent of each group with each answer to:

Which of the following best describes your confidence level when you are considering choosing wines for the enjoyment of others?

<table>
<thead>
<tr>
<th>Confidence Level</th>
<th>Sweet</th>
<th>Tolerant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overwhelmed</td>
<td>6</td>
<td>0</td>
</tr>
<tr>
<td>Embarrassed</td>
<td>6</td>
<td>0</td>
</tr>
<tr>
<td>Timid but I try</td>
<td>18</td>
<td>5</td>
</tr>
<tr>
<td>I know what I like</td>
<td>23</td>
<td>17</td>
</tr>
<tr>
<td>Relatively confident</td>
<td>30</td>
<td>31</td>
</tr>
<tr>
<td>Highly confident</td>
<td>17</td>
<td>17</td>
</tr>
</tbody>
</table>
Respondents selected up to 3 wine types that they frequently drink. The values below represent the times (as percent of total responses) that each wine was chosen by each group.

Sweet respondents prefer sweet, fruity, sparkling, blush and white wines, while Tolerants prefer reds — the bigger the better.
The Sweet group’s preferences for light tastes extends to beer...

...while the Tolerants taste for intensity and alcohol leads them to choose beers they consider less watery, diluted, and “wimpy.”

### BEER PREFERENCES

<table>
<thead>
<tr>
<th>Beer Type</th>
<th>Sweet</th>
<th>Tolerant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Light</td>
<td>33</td>
<td>10</td>
</tr>
<tr>
<td>Domestic Brand</td>
<td>14</td>
<td>10</td>
</tr>
<tr>
<td>Microbrew</td>
<td>11</td>
<td>17</td>
</tr>
<tr>
<td>Imported Lager</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Ale</td>
<td>6</td>
<td>13</td>
</tr>
<tr>
<td>Wheat</td>
<td>6</td>
<td>8</td>
</tr>
<tr>
<td>Stout/Porter</td>
<td>4</td>
<td>7</td>
</tr>
<tr>
<td>Extreme Beer</td>
<td>0.3</td>
<td>1</td>
</tr>
<tr>
<td>I don’t really know</td>
<td>15</td>
<td>6</td>
</tr>
</tbody>
</table>
**Two thirds** of the sweet group use sweet upgrades for their coffee, while **two thirds** of the tolerants do not.

*Sweet respondents are spending extra to have flavorings added to their coffee.*
THE ‘SWEET’ CONSUMER

There’s a new market for wine out there: she’s young, adventurous, willing to try, but put off by all the jargon surrounding wine-speak, and easily embarrassed when confronted by wine authority. Trying to move her to dry wines on the theory that dry wines are inherently better or more appropriate with food will simply backfire.

You will have to engage her and build up her confidence in her wine preferences, if you want to lure her away from cocktails and light beer, and towards wine.

You will have to help her figure out how to pair wines with food in a new, friendly, and free-form way. She’s not sure how to do it and would love to learn—but your advice needs to be personalized to meet her expectations, not dogma.

Preferred wine types include sangria, fruit wines, white zinfandel, and Riesling—especially Riesling—and sparkling wines. You must take care to get the right product to the Sweet consumer: sweet Riesling and Moscato in the 2-5% residual range are very desirable, not the dry, less fruity examples.

Among the reds, the best bets are Shiraz/Syrah, zinfandel, and pinot noir, but they aren’t liked as much as the whites—low alcohol with very little bitterness or astringency is mandatory, whether the wine is red or white. Pinot can be problematic for these Sweet consumers due to bitter phenolics commonly associated with this variety.

THE ‘TOLERANT’ CONSUMER

By contrast, if you have big red wines, then the Tolerant consumer will love them.

Who are the Tolerants? More likely to be male, a little older, and much more confident in choosing wine and in pairing wine with foods—maybe a bit cocky about wine, all told. They like jargon and they like authority.

They look for dry wines, complex wines, balanced wines and full-bodied ones, and will order wine even in a bar or non-dining social situation—in fact they drink wine almost every day. They tend to think of themselves as connoisseurs of wine.

Why do we call them Tolerants, then? Because they are physiologically predisposed to tolerate the bitterness and astringency of intense red wines and are relatively impervious to the burning sensation caused by wines with high alcohol content. In fact, high alcohol often tastes “sweet” to the Tolerant group.

Tolerants choose a very narrow range of wine types. They go primarily for Cabernet Sauvignon and Cabernet Sauvignon based blends.

Interestingly, they share a liking for Pinto Noir and Shiraz/Syrah with the lovers of sweet wines—so if you offer rich yet very smooth examples of these varietals, you can catch both audiences.

Remember, coffee companies struck gold with the ‘Sweet’ consumer:

sweetened and flavored coffee often sells for 3 to 4 times the price of a regular cup of coffee.
The Consumer Wine Awards at Lodi (CWAL), sponsored by the Lodi Tokay Rotary recognizes and celebrates the fact that every person has unique physiological and sensory differences that profoundly affect wine and food preferences.

The judges assessing each category of wine were the very consumers who are most inclined to buy and enjoy the wines of that category.

Consumers interested in becoming Evaluators for the CWAL were required to complete the survey analyzed in this report.

We received requests from over 1000 of people (from those who completed the survey) to become Consumer Wine Evaluators — in the end, 90 were selected for the event.

You can learn more about the CWAL evaluation methodology and view the 2010 results at: www.consumerwineawards.com