



## The Art of Finding the Right People

At Wine Opinions, we believe the validity and value of quantitative research depends entirely on this:

*“Pose the right questions, in the right manner, to the right people.”*

'Right questions' and 'right manner' depend on clearly defined learning objectives, as well as the content and phrasing of questions, question format, and question sequence. This is as fundamental to wine market research as in research for all consumer package goods. Respondent sourcing and quality, however, is a special challenge for wine market researchers.

Wine drinkers as a whole are a relatively low incidence group - about 39% of all legal drinking age adults. And those who drink wine more often than once a week (the group accounting for more than 80% wine sales) are just under 14% of the LDA population.

Our clients most often are looking for insights from even lower incidence populations, such as frequent buyers of wines of a specific varietal, type or region of production; or of a brand and brand competitors. Finding and recruiting such precisely-targeted respondents is a challenge that cannot be fully or efficiently met by commercial consumer panel providers.

Market research companies normally populate their surveys from respondents provided by survey panel companies or commercial survey providers. Wine Opinions rarely uses this option, because commercially provided respondents all too often do not meet the needs of our clients, in terms of wine type or brand purchase and usage qualificatio

Wine Opinions takes a decidedly different approach to finding the right people. Our national panel of more than 20,000 primarily high-frequency U.S. wine drinkers is a proven respondent source that most often meets target audience recruiting needs. But we have also developed a direct recruiting methodology that enables us to source survey respondents of the most exacting brand and wine type frequencies of purchase and usage.

In recent months, we have employed a combination of the Wine Opinions panel and direct-recruit respondent sourcing, resulting in statistically significant consumer segments for comparative analysis.

Here are a few examples of targeted audiences we have recently assembled through our direct recruiting methodology:

- *Frequent buyers of leading red blend wine brands*
- *Regular purchasers of domestic and imported rosé wines*
- *People who make wine spritzers at home or enjoy them in bars and restaurants*
- *Frequent Moscato wine drinkers*
- *Canned wine buyers*
- *Wine drinkers in their 20s*

No two wine consumer research projects are alike, but our unmatched ability to source even the lowest-incidence wine drinker segments assures that we can and do find the "right people" for every survey and discussion group we undertake.

## Depletion Reporting from SipSource

The impact of the COVID-19 pandemic on consumer purchase in both on-premise and off-premise channels has been dramatic. “Shelter-in-place” and “social distancing” directives have driven the largest trade channel shift the beverage alcohol category has ever seen, creating a “teetertotter” effect, with one channel rising sharply in sales while the other channel plummets.

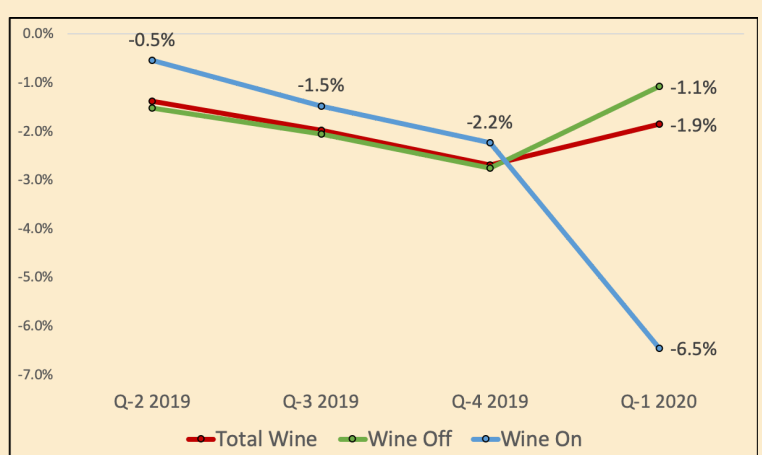
SipSource is uniquely able to provide both data and insights on these trends. They are the only source for aggregated wine depletion data - sales from distributors to the on-premise and off-premise trade channels. Their annual and quarterly reporting (including a semi-annual Industry Sentiment Survey) provide comprehensive, authoritative, and detailed views of wine market activity and trends.

The most recent quarterly reporting notes that there has been a consistent softening in on-premise depletion trends for both wine and spirits over the last year. Unsurprisingly, the significant drop in March depletions has accelerated those negative trends. Wine on-premise trends were down -6.5% at the close of March 2020, while spirits were down -2.1%. These are compared to -2.8% for wine and +2.5% for spirits at the end of 2019.

SipSource representative Dale Stratton sees an emerging pattern of divergent fortunes within the wine category. “Sparkling wines are likely to suffer more as they are significantly more leveraged against the on-premise than table wines,” Stratton says. “Total wine off-premise depletions are 6.3 times larger than on-premise. However, for Spanish Cava the off-premise is only 1.8 times larger and for Champagne they are a mere 2.1 times larger. Prosecco is slightly less likely to be impacted as off-premise depletions are 2.9 times larger than on-premise.”

Stratton likewise sees a similar story for off-premise sub-channels such as Liquor, Mass Merchandise, and Wholesale Club outlets, which are gaining substantially more than Convenience and Drug stores. “Shelter in place directives will end sometime in the future,” Stratton notes. “But their impact is likely to be long lasting in how people purchase products, including alcohol beverages.”

### Depletion Trends On/Off Premise Q2 2019 - Q1 2020



In the chart above, the percentage figures are based on depletion reporting vs. the prior 12 month period. The dramatic Q1 2020 changes in the fortunes of off-premise vs. on-premise depletions are evident. Off-premise depletions reversed the trend of modest decline, while on-premise depletions fell sharply.

For more information or to purchase the full SipSource report visit <https://www.sipsource.com/>.

## Say Goodby to "Generation Z"

The socio-economic impacts of the coronavirus pandemic are felt by every business sector in the U.S. The wine industry is no exception - especially the on-premise tier of the trade. Wine Opinions is preparing a survey of high frequency wine drinkers across the generations to provide insights on their behaviors and changing habits in the short and long terms. Results of this study will be published in April.

Because no group will be affected more in the long run than the generation following Millennials, we are today publishing an opinion article on the evolution and naming of the generations, and their signature wine preferences.

Here is an excerpt from the article:

*“Not since the attack on Pearl Harbor has a generation entering adulthood awakened one morning to a world so suddenly turned upside down, and to futures so uncertain. The course of their lives is taking a detour. And while the challenges they will face as the months and years unfold can only be imagined in this moment, one change coming soon seems inevitable: we won’t be calling them ‘Generation Z’ much longer.”*

You can view or download the complete article [here](#).

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