

A 2011 SURVEY OF THE WINE PREFERENCES OF ROMANIAN KNOWLEDGEABLE WINE CONSUMERS

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Abstract

The survey was based on a questionnaire designed by the authors which included questions related to the preferences as well as the behaviours and attitudes of consumers in relation to the selection of wines. The survey was conducted during a wine fair, the respondents being considered knowledgeable wine consumers. The research included the assessment of the preference for categories of wines classified in accordance with the colour, sugar content, and quality category declared by the producer. Price, label design or origin of wine were variables also evaluated in the study. The influence of combined variables was also investigated. The results showed that the knowledgeable wine consumers prefer red wines (61%), dry (55%), with denomination of origin (58.1%), of Romanian provenance (66.3%), being in this way different from the average consumers. The distribution of preferences in accordance to combined parameters is also graphically presented and discussed with a view on the present situation regarding the supply on the market.

Keywords: wine preferences, questionnaire survey, knowledgeable wine consumers

INTRODUCTION

The wine market in Romania evolved greatly after joining the European Union [10], when the consumers got increased opportunities to experience wines produced in many famous wine regions from abroad. The information and the access to information also diversified, therefore the traditional preferences our consumers expressed for wines changed as compared to several years ago. A survey conducted in 2001-2003 in Romania [1-7], mostly on students or on educated people from large cities, by a group of researchers in cooperation with the

Association of Authorized Winetasters showed that majority of those consumers were interested in the aroma, flavour and taste of the wine [2, 3, 4, 6], very few subjects expressing any interest in the wine packaging or the label [2, 6].

Also, most of those consumers, especially women [1], preferred the white wines, especially from aromatic varieties, many did not understand the difference among the wine categories in accordance to their quality written

on the label, did not understand the difference between hybrid and noble vine and wine [3].

The same research in which wine specialists were interviewed showed had this group had different preferences than the general population. The specialists selections in accordance with the wines colour were 41% red, 35% white and 12% rosé, while for the sweetness degree 79% preferred dry wines, 16% half-dry and 5% not decided [5].

This present survey was started in November 2011 and was intended to evaluate the evolution of the preferences of the wine consumers, so that the supply should be improved on the market in accordance to these new preferences.

The plantation re-conversion or the plantations to be set up in the future should be done in accordance to the new trends, so that the wine grape assortment reflects the present and future demand.

In this paper, the evaluation of the consumer general preferences about the type of wines and their origin was performed.

The evaluation was performed in accordance to a newly designed questionnaire [7].

MATERIAL AND METHOD

The survey was based on a questionnaire [7] designed by the Center for Wine and Vine Studies and Sensory Analysis and applied on 167 respondents who visited the Good Wine Fair Bucharest in the period of 18-20 November 2011.

The sample population consists therefore of knowledgeable wine consumers, who are consumers interested in the universe of wine and who deliberately chose to visit the wine fair.

This is actually the segment of population targeted by the wine producers and suppliers and their preferences will decide the demand, especially in the quality wine distribution chain. The survey was performed with the assistance of some Good Wine Fair personnel, who interacted with the respondents, reading them the questions and filling the respondents' answers on the files.

A pre-testing of the questionnaire was performed in Vintest Wine Fair, a fair held one month before, also in Bucharest. As a result, it was considered useful that the multiple choice answers should be permitted multiple responses, so that the respondent should not be forced into selecting just one preference when she/he had got many to choose from. In this way, more useful information was collected, although the analysis was more demanding, involving distributing equal fractions of points for the several selected answers.

Irrespective of the number of selected answers for a certain question, the sum of the fraction points allotted for those selected answers accounted for a total of 1.

Then, the points accumulated for the same answer form all the respondents were summed up, a quantitative analysis being afterwards performed.

The collected data was introduced into an Excel database, points were granted for those questions where this type of analysis permitted and the responses were evaluated and interpreted.

RESULTS AND DISCUSSIONS

The questionnaire contained simple questions, so that the consumers would not get bored or

tired with them. In the evaluation, however, the simple questions were combined, so that more information was extracted.

Firstly, the responses for the following questions *QI* and *QII* of the survey [7] were analysed.

QI. What kind of wines do you consume usually?

1. White wines
2. Rosé wines
3. Red wines

QII. What sugar level do you prefer in the wines you consume?

1. Dry wines (0-4 g/l sugar)
2. Half-dry wines (4-12 g/l sugar)
3. Half-sweet wines (12-45 g/l sugar)
4. Sweet wines (over 45 g/l sugar)

These are both questions with multiple answers allowed, therefore, for each type of answer fractions of points were obtained and collected into the database.

For a selected answer to a certain question a total of one point was assigned. In *QI*, if out of the 3 possible answers, only one was selected, that answer received 1 point. If out of the 3 possible answers 2 were selected, then each of the answers received 1/2 points. If of the 3 possible answers all 3 were selected, each answer received 1/3 points. The same calculation was applied in the case of *QII*, with 4 possible answers, where 1 point for a single answer, 1/2 for each of the 2 selected answers, 1/3 for each of the 3 selected answers or 1/4 for each of the 4 selected answers were allocated.

Table 1. Preference for the wine colour, irrespective of the sugar content and combined preferences for the colour and sugar content of the wine

Preference for wine colour	White	Rosé	Red	Total	%
Irrespective of the sugar content	55	9.5	102.5	167	100.00
<i>% of answers</i>	32.93	5.69	61.38		
Dry wines	27.25	2.75	62.25	92.25	55.24
<i>% of answers</i>	49.55	28.95	60.73		
Half-dry wines	18.25	5.5	21	44.75	26.80
<i>% of answers</i>	33.18	57.89	20.49		
Half-sweet wines	9	1.25	15.75	26	15.57
<i>% of answers</i>	16.36	13.16	15.37		
Sweet wines	0.5	0	3.5	4	2.40
<i>% of answers</i>	0.91	0.00	3.41		

From the combination of the answers for *QI* and *QII*, the quantitative analyses led to the data included in Table 1.

The distributions of preferences for the wine colour (*QI*) and for the sugar content in wine (*QII*) are shown in Fig. 1 and Fig. 2, respectively.

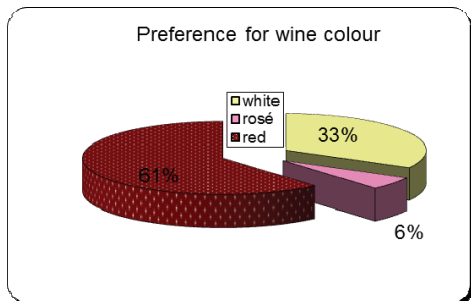


Fig. 1. Distribution of the preferences for the wine colour of the Romanian knowledgeable consumers in 2011

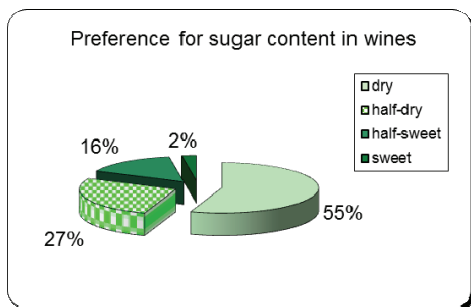


Fig. 2. Distribution of the preferences for the sugar content in wine of the Romanian knowledgeable consumers in 2011

The combined preferences for the sugar content in a wine of a certain colour are presented in the figures 3-5.

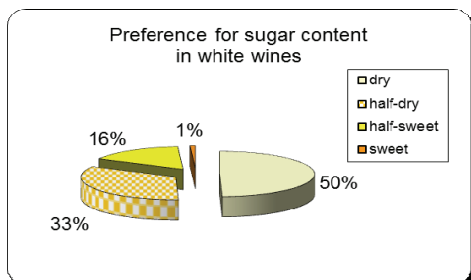


Fig. 3. Distribution of the preferences of the Romanian knowledgeable consumers in 2011 for the sugar content in white wines

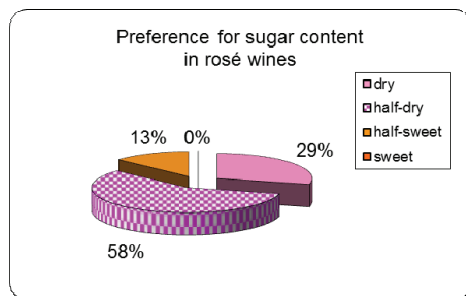


Fig. 4. Distribution of the preferences of the Romanian knowledgeable consumers in 2011 for the sugar content in rosé wines

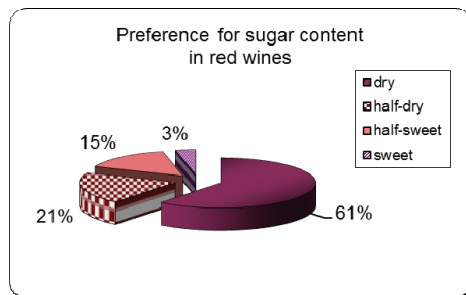


Fig. 5. Distribution of the preferences of the Romanian knowledgeable consumers in 2011 for the sugar content in red wines

The evaluation shows that knowledgeable consumers prefer red wines (61%) over the white and rosé. They also tend to prefer dry wines (55%), irrespective of the wine colour. Many of the white wines are still preferred with sugar, this category reaching the lowest preference for dry wines (50%), while rosé and red are preferred dry with 58% and 61%, respectively.

QIII evaluates the preference for the quality of wine suggested by the label. This question evaluates some aspects related to the quality, including not only the quality category of wine in accordance with our legislation (table, DOC and IG wine), but also the label design and price as markers of quality.

QIII. On shop shelves you find wines with various labels. You select the wine which has written on its label:

1. Table wine (without IG or DOC)
2. Denomination of Origin wine (DOC wine)
3. Geographical indication wine (IG wine)

4. I select in accordance with the general label design

5. I select in accordance with the price.

The respondent had the possibility here too to select multiple answers and the points for each answer were allotted by the above mentioned calculation methodology. For the evaluation, this question was kept as such, no partial information regarding only the quality category in accordance with the legislation being derived.

In fig. 6, we can see that the preference of the knowledgeable consumers is clearly in favour of DOC wines, a quality category supposedly including the wines with the highest quality, which in Romania represented in 2009 only 5% of the total wine sold including the table wine from hybrids [12] or 13.3% [9] - 15% [11] of the total noble wine marketed.

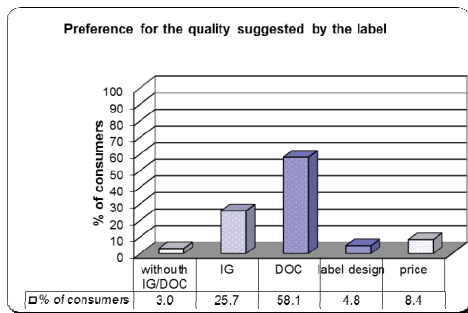


Fig. 6. Distribution of the preferences of the Romanian knowledgeable consumers in 2011 for the quality suggested by the label

The label design (including the brand name) is not yet established in Romania as a leading preference, only 5% of the interviewed consumers mentioning it as being of importance.

The price is however a component that cannot be ignored, 8.4% of the consumers selecting their wines irrespective of the quality category, solely in accordance to the price. The percentage is expected to be actually much higher in the entire population, taking into account that this survey was conducted at a wine fair, where the visitors are more knowledgeable in respect to wine types and styles and more willing to spend money for the perceived quality.

By combining the answers given by a person to the question *QIII* regarding the wine quality and *QII* regarding the sugar contents, we obtain the distribution of preferences included in Table 2.

Table 2. Distribution of answers (fraction of points allocated) describing the preference for the quality of wine and sugar content

Wine quality/ Sugar content	without IG/DOC	IG	DOC	label design	price
white dry	1.00	11.08	13.84	0.00	5.08
white with sugar	1.00	8.08	16.34	1.00	1.58
rosé dry	0.00	0.00	3.00	0.00	0.00
rosé with sugar	0.00	0.50	4.50	1.00	0.00
red dry	0.00	17.41	36.43	2.50	5.66
red with sugar	1.50	9.41	14.43	4.00	7.66

For the rosé there is no clear image regarding the level of expected quality in the bottle, therefore the consumers appear to make a selection in accordance with the offer in the market, which is mostly in the quality category DOC.

In white wines the preference for the dry wines is almost equal with that for the wines containing sugar (31 total points for dry wines and 28 points for sugar containing white wines), while for the red wines the preference is clear for the dry wines (62 total points for dry wines and 37 points for sugar containing white wines).

The combined distribution for quality suggested by the label (*QIII*), the sugar content of the wine (*QII*) and colour of the wine (*QI*) is presented in Fig. 7.

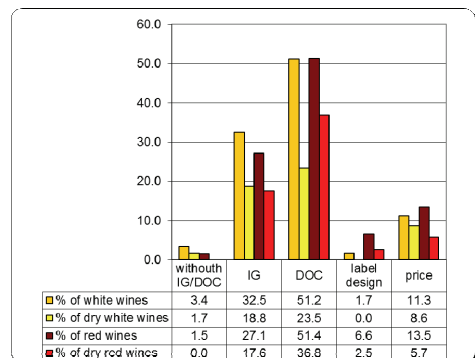


Fig. 7. Distribution of the preferences of the Romanian knowledgeable consumers in 2011 for the quality suggested by the label, sugar content and colour of wine

Then, by the use of *QIV*, the preference for the imported or Romanian wines was evaluated (Fig. 8), showing a high tendency towards the consumption of Romanian wine (66%).

QIV. Considering the wine provenance what kind of wines do you prefer?

1. Romanian wines
2. European wines (France, Italy, Spain, Germany, Portugal etc.)
3. From outside of Europe (Chile, Argentine, New Zealand, Australia etc.)

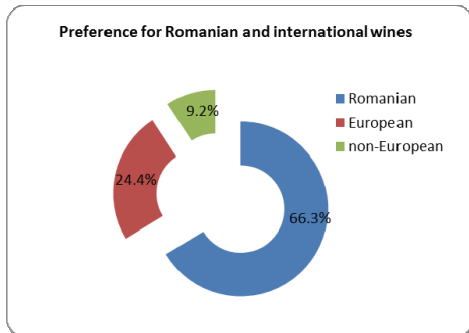


Fig. 8. Distribution of the preferences of the Romanian knowledgeable consumers in 2011 for the wine provenance

In combinations with the answers given to *QI*, the preference for the provenance of wine and the colour was evaluated (Fig. 8).

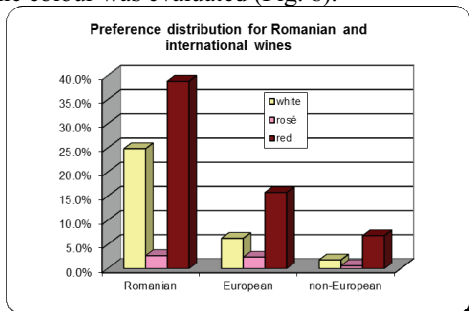


Fig. 9. Distribution of the preferences of the Romanian knowledgeable consumers in 2011 for the provenance and colour of wine

By also including into this evaluation the answers given to question *QII*, the preference distributions in accordance to provenance and sugar content are presented for white, rosé and red wines in figures 10-12. The points allocated for each type of response, as well as the

percentage of that specific answer are both included in the graphical representation.

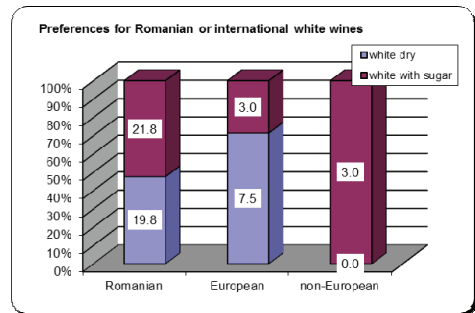


Fig. 10. Distribution of the preferences of the Romanian knowledgeable consumers in 2011 for the provenance and sugar content of white wines

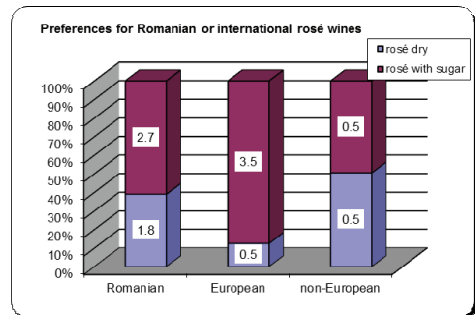


Fig. 11. Distribution of the preferences of the Romanian knowledgeable consumers in 2011 for the provenance and sugar content of rosé wines

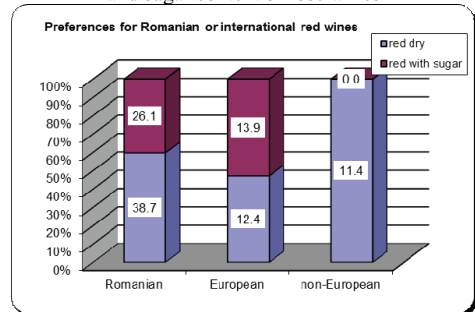


Fig. 12. Distribution of the preferences of the Romanian knowledgeable consumers in 2011 for the provenance and sugar content of red wines

Taking into account the answers given by the respondents to questions *QI*, *QII* and *QIV* we obtain the preference distribution of all these aspects (Fig. 13).

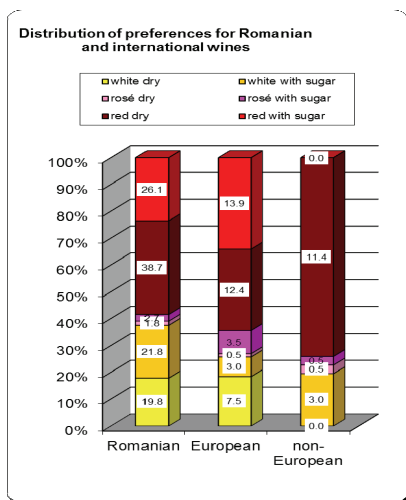


Fig. 13. Distribution of the preferences of the Romanian knowledgeable consumers in 2011 for the provenance, sugar content and colour of wines

We can see that the impact of the imported wines is not at all negligible, 25% of the preferences going to European wines and 8% to non-Europeans (Fig. 8). The non-European wines, coming from the so called New World, are still not enough known by the Romanian consumers, therefore most of their preferences went to the dry red wines (74.1%, Fig. 13), more imported and distributed on our market. The European (Old World) wines are better known and the preferences are in favour of red wines (64.5%), followed by white (25.7%) and rosé wines (9.8%). For the Romanian wines, the distribution is still in favour of red wines (58.5%), but the white wines are also important (37.5%) with the rosé appearing only occasionally (4.1%).

The distribution of the preferences for wines of various colours in accordance to their Romanian or international provenance shows (Table 3) that most of the white wines consumed are of Romanian origin (75.5%).

Table 3. Distribution of the preference for the wine colour in accordance to its provenance (in %)

	Romanian	European	non-European	Total
white total (%)	75.5	19.1	5.5	100.0
rosé total (%)	47.4	42.1	10.5	100.0
red total (%)	63.2	25.7	11.1	100.0

In case of red wines too there is a preference for the Romanian wines, but with a lower share (63.2%) than in the case of white wines, 25.7% of the preferences going to the European red wines.

For rosé wine there is no clear preference for Romanian or imported wines, the number of answers pointing towards rosé wine being too small to consider the distribution depicted in Table 3 significant.

CONCLUSIONS

As compared to the data obtained 7-10 years ago, this survey shows a clear evolution in Romanian consumer preferences for the types and styles of wines, towards a situation more in line with the international tendencies.

The knowledgeable consumers showed a preference for red wines (61%), a result never obtained on Romanian consumers before, as the prevalence of the white wines in the local chain of supply and demand is notorious. This result cannot be extrapolated to the entire population, where it is expected that the preference would be still in line with the present wine assortment that can be supplied on the internal market, that dominated in 2011 by 72% white wine [8]. However, it shows a tendency which is likely to shift more and more toward red wines.

In a market dominated by half-dry and half-sweet wine consumption (27.4% and 45.0% in 2011, [8]), the knowledgeable consumers appear to set a trend for more dry wine purchases, these wines reaching 55% in their preferences, as compared to only 12.4% for the general population [8].

The knowledgeable consumers are able to recognize the Denomination of Origin label as a sign of quality and their preference for this wine category is 58.1%, and 25.7% for IG, levels in total contrast to the proportions in the supply of Romanian wines, which in 2009 was in reverse order (5.3% for DOC, 19.9% for IG and 74.8% for wines without DOC or IG including the wine from hybrid varieties [12].

The impact of joining the European Union is visible too in the increased preference for international wines especially from Europe (24.4%). Still, the preference of knowledgeable wine consumers is for the Romanian wines

(66.3%); however, the preference of the general population for Romanian wines, correlated also with the notorious tendency to favour lower prices, is expected to be much higher. The knowledgeable wine consumers seem to care less for the price, basically selecting their wine in accordance with the desired quality. Still, 8.4% of the answers pointed out that the price is important for this category of consumers too.

ACKNOWLEDGMENTS

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