



Wine Market Council 2019 On-Premise Consumer & GuildSomm Trade Survey

GuildSomm Trade Survey, Base = 618 GuildSomm members

- Sommelier respondents reported an overall increase in dollar value over the past year for wine, beer and spirits, but most significantly for wine.
- The majority of trade respondents increased the number of wines and the countries, states, regions, or appellations represented on their by-the-bottle list over the past year. Spain, California, and Washington state were the regions that made the greatest overall gains in representation on wine lists. In terms of wine types, Pinot Noir, Cabernet Sauvignon, red blends, dry rosé, Champagne and other imported sparkling wines made the most significant gains in list placements.
- A majority of trade respondents increased the number of suppliers they used.
- Unusual or unfamiliar wines and imported wines are the most prevalent categories of wine trade respondents added to their by-the-glass lists in the past year.
- Half the respondents increased their \$15-\$19 by-the-glass offerings. Results suggested a slight shift away from wines in the under \$15 price category and a slight shift toward \$20+ offerings.
- Trade participants were asked to weigh in on aspects of their jobs they find most challenging. Issues dealing with staff were at the top of the list as the toughest part of their job—finding and retaining staff, and educating and training staff. Hiring knowledgeable and responsive sales staff and increasing allocation transparency were the top responses to how distributors, importers and suppliers can help to improve relationships with on-premise customers.

On-Premise Consumer Survey, Base = 1,200 wine drinkers

- The majority of consumer respondents reported dining out at venues that serve alcohol at about the same rate as they did a year ago. Of the remaining respondents, a greater proportion are dining out more often than less often, especially in the case of High Frequency wine drinkers (drink wine more often than once a week). The two top reasons some are eating out less often are they are cooking at home more often and dining out doesn't fit within their budget.
- Fewer than one in ten consumer respondents indicated they are drinking less wine than a year ago. The top reason for drinking less wine differs between High Frequency wine drinkers and Occasional wine drinkers (drink wine once a week or less often): High Frequency wine drinkers prefer to drink

wine at home, while Occasionals are drinking less alcohol in general and regard on-premise wine as too expensive.

- High Frequency wine drinkers are more likely than occasional wine drinkers to choose wine for a variety of occasions, with the exception of special occasions, for which wine is chosen by Occasionals at the same rate as High Frequency wine drinkers. In general, Occasionals typically choose spirits/cocktails over wine or beer at cocktail parties or "girls"/"guys" night out, and beer over wine or spirits at weekend lunches with friends.
- When dining out, more than half the consumer respondents typically order wine by the glass and one-quarter typically order by the bottle. The remaining respondents typically order both.
- When choosing a wine on premise, the most important factor for all consumers is that the wine is available by the glass, followed by previous trial and that it goes with the food they are ordering.
- Although food is a consideration for many, the vast majority of respondents tend to order wine they enjoy drinking no matter what they're eating, and to agree that wine that is not perfectly matched with the food they're eating does not diminish their enjoyment of the meal.

Trade vs. Consumer Perspectives

- When choosing wine on-premise, consumers consider what they are eating and previous trial more important than sommelier or waiter recommendations. By contrast, sommelier respondents believed that telling customers they personally prefer a wine is the most effective way to help them choose a wine, followed closely by recommending a wine-food pairing. Consumers and Sommeliers are in agreement that critical scores are the least important or effective among the factors tested.
- Most wine lists at participating sommeliers' place of business are primarily organized by geographic origin, followed by wine type or varietal. In contrast, consumer respondents most prefer wine lists organized by type of wine or varietal, followed by price, wine style, and then origin. However, it is important to note that High Frequency wine drinkers are significantly more apt to find a wine organized by origin more helpful than Occasional wine drinkers, who find organizing by price more useful. In addition, lists organized by wine type were more strongly favored by those aged 40+, and lists organized by style or flavor by those under 40.
- Among alternative pour sizes, tasting flights, wine on tap and wine-based cocktails the majority of sommelier respondents were most likely to agree that the availability of alternative pour sizes is growing, followed by wine on tap. Of these formats, alternative pour sizes have been ordered by the largest contingent of consumer respondents, and fewest have tried wine on tap, indicating that wine on tap may not yet be widely available.