WHO'S HAVING A ROMANCE WITH ROSÉ?

Sales of pink wines are hitting new highs, but relatively little is known about the consumers who buy them. Now a study by Wine Intelligence, a branding and market research company that survey the global market, has thrown new light on the rosé drinker. Wine Intelligence's Graham Holter explains the results.

Many in the wine industry have a lot to thank rosé wines for. With markets maturing – or in danger of stagnating – in many parts of the world, it has been pink wine that has spared blushes. There is nothing new about rosé wines, but there is something new in the way consumers have embraced them after years of indifference, even prejudice.

Suddenly, producers are falling over themselves to launch new rosés, or rosé brand extensions, and consumers show few signs of boredom with the category. In France, rosé has reportedly eclipsed white wine, at least in volume terms, accounting for one in five bottles sold domestically.

Who are the rosé drinkers?

In many markets, it was once easy to generalise about rosé drinkers: they were assumed to be undemanding low spenders and probably female. Outside of specialist producing areas like Provence, where rosé is taken seriously, the wines available were likely to be packed with residual sugar, a turn-off for serious wine drinkers. But as the variety of rosé wines has expanded, and drier styles have hit the mainstream, the profile of the rosé wine drinker has shifted.

Wine Intelligence studied the impact rosé drinking has had on 13 major wine markets, and examined the DNA of rosé drinkers around the world. The picture that emerges is of a category which may still be dominated by females, but which is demonstrating a broader appeal than some might give it credit for – and seems ripe for further growth.

So where is rosé drinking most prevalent? A simple measure of sales value would reveal where the major markets exist, but a more meaningful analysis is to consider which markets have the highest penetration.

» Rosé has definitely become more popular. Five years ago our range included about five rosé wines. Since then it has grown to 13. «

James Hepple, marketing controller, Watson's Wine Cellar in Hong Kong

Wine Intelligence's Vinitrac® survey – which questions regular wine consumers about their drinking habits – asked respondents to state whether or not they had consumed rosé wine within the past six months. The results illustrate some major behavioural differences.

In 12 of the 13 markets, the majority of consumers questioned could be classed as occasional or regular rosé drinkers. The exception was Brazil, where just three in 10 wine drinkers ever explore the category. There was, however, a slight difference in the methodology there: instead of interviewing 'regular wine drinkers', as it did in all other countries, Vinitrac's Brazilian survey concentrated solely on consumers who were regular drinkers of imported wine.

At the other end of the spectrum, Swiss wine drinkers have a demonstrable affection for rosé, as do the Germans. This may be because both nations have a tradition of light red wines, making rosé more of a natural choice for consumers. This, however, would not explain rosé's soaring popularity in Belgium, the Netherlands and the UK where winemaking heritage is virtually non-existent.

In Sweden, Sara Engstrand, a cateory manager for Systembolaget, says there are now 22 rosé SKUs in the permanent range. "During the summer season, we increase the assortment with around 25 extra SKUs," she reports.

Consumer penetration does not reveal the entire picture. It is also important to take into account how important rosé wine is to those who profess to drink it regularly, or at least some of the time. Unsurprisingly, there is no market where rosé dominates drinking habits – indeed, the research could not identify any country where rosé accounts for even a quarter of consumers' repertoires. But it is intriguing to see Brazil emerging at the top of this particular league table – the conclusion being that, while Brazilians are less likely to buy rosé than in the other 12 markets in the study, those who do are more loyal to the category than wine drinkers elsewhere. The USA, UK and the Netherlands are not far behind. This may be partly explained by the fact that some drinkers are intensely loyal to the sweeter rosés prevalent in these markets – notably Californian White Grenache and White Zinfandel – and drink them to the exclusion of most other styles.

Mulan Chan-Randel, who buys French wine for K&L Wine Merchants in California, was an early adopter of the drier style. "Over the past five years our range has increased as interest has grown," she says. "Five years ago K&L featured 10 rosés from the south of France. This year, we are featuring 33."

Rosé opportunities

Jean-Philippe Perrouty, senior research manager at Wine Intelligence, sees opportunities for more rosé sales in the UK, where it only accounts for 10% of the off-trade. He points out that the biggest rosé drinkers are what the company describes as 'uninvolved' with wine as a category. "Rosé still accounts for only a marginal share of throat among 'involved' wine drinkers," he claims, "and there is also still room to recruit new consumers in Scandinavian markets as well as to win share of throat relative to other colours among current rosé drinkers."

The Wine Intelligence research found a clear link between the colour of rosé wine and its perceived value. Consumers in the USA and UK were shown five samples, ranging from very dark to very pale, and asked to assess their likely retail prices. The results were virtually identical in both countries. In both cases, the very dark rosé was assumed to be worth more than the very light wine – almost $2 more in the US research, and about 40p more among the UK sample. In both countries, consumers naturally assumed that the darker the wine, the more it was worth paying for it. Perhaps more worryingly, in both markets consumers do not believe rosé wines are worth paying as much for as red or white alternatives. In the US, consumers in the study claimed they would pay, on average, a maximum of $17.41 for a red wine and $16.20 for a white. For blush wine, that figure fell to $14.06 and for rosé to $13.85, with American consumers evidently making a distinction between the two. In the UK, the average maximums were £8.81 for red, £8.14 for white and £7.33 for rosé.

In terms of gender, rosé still seems to appeal disproportionately to women. In markets where Wine Intelligence has carried out detailed research into rosé drinkers and their habits, there is generally a female bias among regular rosé drinkers. This is most pronounced in the UK, where 62% of rosé drinkers are women; the figure in the USA is also 62% and 61% in both Germany and the Netherlands. Only Sweden has more male rosé drinkers than female, but even here the 52-48 split is merely replicating the scenario for white and reds.

The research in most markets paints a picture of a youthful audience with a thirst for new styles of wine. Perhaps this group is the solid bedrock on which the rosé category can build future growth; or maybe this most fickle consumer demographic is merely passing through, ready to explore the next fashion in alcoholic beverages whenever it arrives.

Much will depend on how much work the wine industry puts into understanding the audience for rosé wine – whose boom had been predicted for years, but which still caught many people by surprise. ■

1 Internatonal comparison of rosé consumption

Country	%	Percentage of regular wine drinkers who drink rosé
Switzerland	83	
Germany	78	
Belgium	75	
Netherlands	75	
UK	72	
Ireland	65	
USA	63	
Sweden	61	
Finland	60	
Canada	59	
Denmark	59	
Norway	55	
Brazil	30	

*Those countries with a tradition of light red wines consume far more than other nations.

SOURCE: © WINE INTELLIGENCE VINITRAC ® GLOBAL MARCH | APRIL 2008

2 How often do they drink rosé?

Country	%	Percentage of rosé wines*
Brazil	22	
USA	21	
Netherlands	20	
UK	20	
Germany	18	
Ireland	17	
Switzerland	17	
Belgium	16	
Canada	14	
Finland	10	
Norway	10	
Sweden	10	
Denmark	9	

*as a percentage of still wines consumed