

Report Brochure



USA LANDSCAPES 2013

WINE INTELLIGENCE REPORT 2013



REPORT PRICE: • GBP 2,500 or 5 Report Credits

CONTENTS



- Introduction
- Management summary
- Market overview
 - Wine Intelligence global market classification
 - Wine volume size and growth
 - Per capita consumption
 - Imported vs. domestic wine market share
 - Still light wine by country of origin
 - Sparkling wine by country of origin
- Regulations and distribution
 - Regulatory framework overview
 - Distribution system
 - Taxation and duties
 - Direct wine sales
- US wine consumers
 - Overview: Who are they?
 - Demographics: Age, gender, state, income
- Who drinks wine in the US
 - Wine consumption frequency
 - Drinks portfolio (other drinks)
 - Repertoire by colour (red, white, rosé)
 - Repertoire by varietals
 - Repertoire by source country
 - Wine buying channels
 - Retailer usage
 - Off-premise
 - Wine drinking frequency in off-premise occasions
 - Typical off-premise spend
 - On-premise
 - Consumption of wine in on-premise
 - Wine drinking frequency in on-premise occasions
 - Typical on-premise spend
 - On vs. Off-premise wine consumption
- Attitude toward wine
 - Relationship with wine
 - Wine involvement
 - Attitude statements
 - Important choice cues when buying wine
 - Attitudes towards closures
- Region of origin
 - Awareness
 - Conversion
 - Penetration
 - Region health
- Brands
 - Prompted awareness
 - Conversion
 - Penetration
 - Brands health
- Consumer profiling by age
- Consumer profiling by gender
- Consumer profiling by US regions
- Appendix

Excerpts from the introduction



“The US wine market is already the largest on the planet. Yet per capita consumption is remarkably low: the average citizen drinks marginally only marginally more wine than a typical South Korean. That, in a nutshell, tells you quite a lot of what you need to know about the Great American Wine Opportunity.”

“But there is clearly more to it than that. What makes us think that Americans want to drink more wine than they do currently? Where is the growth coming from? Which regions of this vast country present the best opportunities? What are the demographic groups to be aiming for? How do you negotiate the three-tier distribution system?”

“This report aims to answer questions like these, and to make some kind of sense of a market that, from a distance, can sometimes appear deceptively straightforward, but in reality can often be fiendishly complicated.”

“Thanks to Wine Intelligence’s Vinitrac® research, we actually know quite a lot about these consumers: where they live, how old they are, how much they earn – and that’s before we even get to the subject of wine itself. The detail is spelled out later on, but we can see that we’re dealing with a notably younger group of people than we typically see in other markets. We can also see that they’re not spread evenly across the country – there’s a definite East Coast bias at play.”

“There really isn’t such thing as ‘the American wine drinker’, which is why Wine Intelligence’s Portraits consumer segmentation has played such a vital role in our understanding of the US market. There are six groups, all outlined in this report, and as will become clear, just two of them – the Millennial Treaters and the Experienced Explorers – account for more than half the total spend.”

“What stares you in the face, as you make even a cursory effort to understand the US wine market, is that opportunity exists almost everywhere. There are regions to conquer, new wine drinkers to coax into the market, and existing consumers who can be encouraged to continue their wine journey. The American Dream, as far as wine is concerned, lives on.”



Erica Donoho
Country Manager - USA



Graham Holter
Associate Director, publishing
Wine Intelligence



SAMPLE SIZES

At least 500 respondents per survey; 1,000 in most countries, 2,000 in US
Regular adult wine drinkers (where 'regular' = drinks wine at least once per month)

Each Vinitrac® survey starts with questions to screen respondents:

- Adult drinking age within each country
- Permanent resident of the country being surveyed
- Drinks wine at least once per month
- Drinks at least red, white or rosé wine
- Buys wine in the off-premise and/or in the on-premise channels

... and rejects all respondents who do not fulfil these Vinitrac® criteria



Each sample is representative of the 'regular' wine drinking population in that market and is therefore valid; a sample size of at least 500 consumers ensures results are reliable. It's like a 'smaller' version of the wine drinking population at large



- The data for this study was collected in March 2013
- Data was gathered via Wine Intelligence's Vinitrac[®] online survey with n=2,044 US regular wine drinkers, fully representative of adults over 21 years who drink still light wine at least once a month in the USA, in terms of age, gender and region
- Respondents were screened to ensure that they drink wine at least once per month; drink red, white or rosé wine; and buy wine in the off-trade and/or in the on-trade
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- 2013 data is tracked against the March 2011 wave, except for the brands questions which use April 2011 data



WHY IS VINITRAC® NOT A PANEL?

- Panels are good for monitoring detailed purchase activity but require regular input from exactly the same complete group of respondents
- This requires more time from respondents, for which they are paid, and panels are therefore more heavily skewed towards home-based consumers, e.g. students and home-makers
- This group of a country's wine-drinking population does not fully represent the accurate weighted sample of adult regular wine drinkers on which Vinitrac® insights are based

HOW DOES VINITRAC® WORK?

- Invitations to participate in Vinitrac® are distributed to adult consumers in each market
- Consumers interested in a wine survey are directed to an URL address, which welcomes them to the online survey
- Wine Intelligence monitors incoming completed responses to build a sample representative of the wine drinking population of the target market
- When a representative sample of at least 1,000 (US: 2,000) is logged, the survey is closed



- Measures from the IWSR correspond to actual wine consumption figures. This means sales into the trade (on + off premise)
- The IWSR visits each market each year. Discussions are held with key local experts in the market including importers, producers, grey market operators, duty free operators, and supermarket/hypermarket buyers.
- All volume data is given in thousand 9 Litre Cases
- In the breakdown by country of origin, IWSR includes (depending on the market and the size of the category) the following two categories: 'Other' and 'International'
They are defined as followed:
 - 'Other': category including wine blends (normally in bulk or bottled without specified country of origin) and wines from other countries with volumes too small to break out separately
 - 'International': Category including wine brands that have wines from various countries
- The IWSR includes the following types of wine in its definition of 'wine':

Definitions

WINE =

Still light wine +
Sparkling (Champagne & other) +
Fortified +
Light aperitifs (vermouth...) +
Other (rice wines...)

} Sub-categories



REPORT PRICE: • GBP 2,500 or 5 Report Credits

Format: 110 page PowerPoint (PDF)

Purchase online: www.wineintelligence.com/reports-shop/landscapes/

Contact us directly: reports-shop@wineintelligence.com



If you have any questions, please contact your local Wine Intelligence office:

AVIGNON

Jean-Philippe Perrouty, Director, Wine Intelligence France | T +33 (0)486 408 417 | Email: jean-philippe@wineintelligence.com

BEIJING

Rui Su, Research Manager | T +86 10 6260 2428 | Email: rui@wineintelligence.com

CAPE TOWN

Dimitri Coutras, South Africa Country Manager | T +27 828288866 | Email: dcoutras@iafrica.com

DELAWARE

Erica Donoho, USA Country Manager | T +1 973 699 4158 | Email: erica@wineintelligence.com

FRANKFURT

Wilhelm Lerner, Associate Director/Germany Country Manager | T +49 (0)175 5806 151 | Email: wilhelm@wineintelligence.com

LONDON

Ali Darke, Senior Project Executive | T +44 020 7378 1277 | Email: ali@wineintelligence.com

MELBOURNE

Stephanie Duboudin, Australia Country Manager | T +61 437 663 878 | Email: stephanie@wineintelligence.com

RIO DE JANEIRO

Paul Medder, Brazil Country Manager | Email: paul.medder@wineintelligence.com

TRISTE

Pierpaolo Penco, Italy Country Manager | T +39 349 424 3371 | Email: pierpaolo@wineintelligence.com