

The logo for vinitrac, featuring the word "vinitrac" in a dark blue, lowercase sans-serif font. The letter "i" is stylized with a light blue dot. A registered trademark symbol (®) is located to the right of the word. The logo is enclosed in a dark blue rounded rectangular border.

vinitrac®

Sparkling

2018

**Monitor and track the attitudes,
behaviour and consumer
relationship with sparkling wine
around the world**

Wine Intelligence was founded in 2001 to support the global wine industry in understanding customers better. The company conducts insights and consultancy projects with trade and consumer respondents around the world and is now established as the world’s leading research-led insights, branding and marketing strategy consultancy for the wine sector. Our active clients, who include some of the wine businesses in the world, now number over 100 companies and organisations.

What is Vinitrac® Sparkling?

Vinitrac® Sparkling is our wholly-owned global survey of sparkling wine drinkers, which monitors and tracks the attitudes, behaviour and the consumer relationship with sparkling wine around the world

- Vinitrac® Sparkling surveys use a representative sample of adults who drink sparkling wine in each of the countries where we operate.
- Each Vinitrac® Sparkling survey consists of a standard question set, supplemented with client specific questions.

Questions focus on the following topics:



Sparkling wine brand health

Awareness, purchase, conversion, consideration, affinity and recommendation



Purchase cues

What factors motivate your consumers to buy sparkling wine



Demographics

Discover who is buying your brand or category and how they view it



Advertising and name testing

Test your advertising campaigns and brand names prior to launch



Packaging attitudes

Test label and packaging designs before they go to market

Vinitrac® Sparkling markets – May / June 2018

Australia ▪ Belgium ▪ Brazil ▪ Canada ▪ China ▪ France ▪ Germany ▪ Italy ▪ Japan ▪ The Netherlands ▪ UK ▪ US

Other markets available on request: contact us for details
Discounts available for multimarket projects

Important dates



Surveys in field
May and June 2018

Question title		Question label
1	Country of residence	Which country do you live in?
2	Region of residence	In which region do you live?
3	Age	Which of the following age groups do you fall into?
4	Gender	Are you...?
5	Awareness of sparkling wine types	Looking at the sparkling wine types below, please indicate which ones you have heard of:
6	Consumption of sparkling wine types	Which of these sparkling wine types have you drunk in the past 12 months?
7	Consumption of other alcoholic beverages	Which of these alcoholic beverages have you drunk in the past 12 months? (still wine, beer, cider, spirits, etc.)
8	Consumption frequency of alcoholic beverages	Please tell us how often you drink each of the following types of drinks? (sparkling wine vs. other alcoholic beverages)
9	Preferred alcoholic beverage	And, generally speaking, which one is your preferred drink? (sparkling wine vs. other alcoholic beverages)
10	Beverage suitability for off-trade occasions	Which of the following beverages would you consider drinking for each of the following occasions when you are at home or at a friend or family member's house?
11	Beverage suitability for on-trade occasions	Which of the following beverages would you consider drinking for each of the following occasions when you are in a bar, pub or restaurant?
12	Consumption frequency of sparkling wine types	How often do you usually drink the following types of sparkling wine?
13	Consumption frequency change of sparkling wine types	How has your consumption of the following sparkling wines changed over the past 12 months?
14	Proportions of red, white and rosé/pink sparkling wine	What proportion of red, white and rosé/pink sparkling wine do you drink?
15	Sparkling wine types consumption locations	In which of the following places do you drink the following types of sparkling wine?
16	Sparkling wine types format in a bar/pub	How do you tend to order the following sparkling wines in a bar or pub?
17	Sparkling wine types format in a restaurant	How do you tend to order the following sparkling wines in a restaurant?
18	Sparkling wine types purchase cues	Looking at the list below, which is the most important factor when buying sparkling wine in a shop to drink at home.
19	Sparkling wine types quality perception	Thinking about these types of sparkling wine, please indicate your view of their quality. Please give your answer on a scale of 0 to 10 where 0="Very low quality" and 10="Very high quality"
20	Sparkling wine types value for money perception	Thinking about these types of sparkling wine, please indicate your view on their value for money. Please give your answer on a scale of 0 to 10 where 0 = "Very poor value for money" and 10 = "Very good value for money"
21	Sparkling wine types imagery perception	Below is a list of statements that could describe a type of sparkling wine. Please indicate by clicking in the appropriate box where you feel a statement definitely describes the type of sparkling wine shown here.

Question title		Question label
22	Sparkling wine types purchase channels	From which store(s) have you bought the following sparkling wines in the past 6 months?
23	Typical spend in off-trade by the bottle	When buying a 750ml bottle of sparkling wine to have at home or at a friend's place, how much do you typically spend on a bottle?
24	Typical spend in on-trade by the bottle	How much do you typically spend on a 750ml bottle of sparkling wine in a bar, pub or restaurant?
21	Sparkling wine types imagery perception	Below is a list of statements that could describe a type of sparkling wine. Please indicate by clicking in the appropriate box where you feel a statement definitely describes the type of sparkling wine shown here.
24	Typical spend in on-trade by the bottle	How much do you typically spend on a 750ml bottle of sparkling wine in a bar, pub or restaurant?
25	Typical spend in on-trade by the glass	How much do you typically spend on a glass of sparkling wine in a bar, pub or restaurant?
26	Sparkling wine brand prompted awareness	Looking at the brands below, which of the following have you heard of that make sparkling wine?
27	Sparkling wine brand purchase	Which of these sparkling wine brands have you bought in the past 6 months?
28	Sparkling wine brand consideration	Which of the following sparkling wine brands would you be likely to consider buying?
29	Sparkling wine brand affinity	Which of these sparkling wine brands do you think are right for people like you?
30	Sparkling wine brand recommendation	Which of these sparkling wine brands would you recommend to a friend?
31	Sparkling wine brand most often	And which of these sparkling wine brands would you say that you BUY most often?
32	Sparkling wine attitude	Thinking about your attitude towards sparkling wine, please look at the statements below and choose the one that is most appropriate to you.
33	Involvement, value and perceived expertise	Looking at the statements below, please indicate the extent to which you agree with each on a 1 to 5 scale where 1="Disagree strongly" and 5="Agree strongly"
34	Income	Which of the following best describes your total household income before taxes last year.

Client-specific questions

In addition to the standard pack questions, our clients can also commission confidential and bespoke questions.

Example bespoke questions may include:

- Looking at the places below, please indicate which place(s) you know make Prosecco?
- Thinking about sparkling wine, which brands come to mind?
- Looking at the list below, please indicate how important each is to you when buying sparkling wine for an everyday drinking occasion.
- Looking at the brands below, please indicate which of the following brands you have seen advertising for in the past six months?
- Please select the occasion you think the following sparkling wines would be the most appropriate for.
- Please indicate your view of the quality of the wines produced in Champagne. Please give your answer on a scale of 0 to 10 where 0=“Very low quality” and 10=“Very high quality”.

Leading multinational sparkling wine producer

Packaging test to determine optimum bottle/label style for product launch in European country

BUSINESS CHALLENGE

Having secured a new listing at a leading European retailer, the client needed to decide which style of packaging to use for their product. There were 2 candidate designs, quite different from one another, and there were supporters for both options within the product development team. The question was: which design would have more appeal and likelihood to buy with shoppers of sparkling wine who visit the retailer?

SOLUTION

With a 3 week deadline for a definitive answer, the Wine Intelligence team designed and fielded an experimental design quantitative survey in the market, with 900 respondents, with half seeing Version A of the proposed product, and the other half seeing Version B, and asked to rate the product for appeal, likelihood to buy, and expected price. Both groups were then shown the designs side-by-side and asked to express a preference.

“We needed some insights very quickly about what would be the best packaging to use for our sparkling wine product in a new listing in a key export market. Wine Intelligence worked quickly to create a research design and fielded our study within 2 weeks, and we had our answer after 3 weeks, in time for the product team to make their decision.”

Export Director,
Leading multinational sparkling wine producer

IMPACT

The result from the A-B experimental design quantitative test was clear enough for Wine Intelligence to make a definitive recommendation on the optimum packaging. One of the crucial factors was the finding that frequent purchasers, and those already familiar with the client’s brand, had a distinct preference for one design over the other.

Usage, attitude and brand health data for sparkling wine in the Canadian market

Ongoing project

BUSINESS CHALLENGE

A major multinational sparkling wine producer and distributor was looking for ongoing insights about the usage and attitude of sparkling wine drinkers in Canada towards the sparkling category. The client was also seeking data on the health of their brand portfolio in the market – ongoing awareness, usage, affinity, consideration and recommendation levels. They also wanted to find out who was drinking their brands.

SOLUTION

Wine Intelligence designed an annual tracking project with a mix of tailored questions that were confidential to the client and standardised questions such as usage frequency, brand health and attitude to the category

AT A GLANCE

CLIENT:	Major multinational
COUNTRY:	Canada
TYPE:	Quantitative consumer tracking survey
DATE:	Since 2017

IMPACT

The insights showed the relative positioning of the client’s brands in the market, and the profile of those brands’ consumers. The findings are being incorporated into the annual planning process for the client’s Canadian operations.

Project type	Deliverables	Cost (per market)
Brand health report (30-40 standard sparkling brands per market + up to 3 additional brands, across 6 measures: awareness, purchase, conversion, consideration, affinity, recommendation)	Excel data table and PPT presentation with the profiling of awares / buyers for up to 5 selected brands	GBP 5,500 / AUD 9,900 USD 7,700 / EUR 6,325
Ad-hoc sparkling label/package test (up to 6 designs, across 3 measures: attractiveness, purchase intent and price expectation)	Excel data table and PPT presentation	GBP 7,000 / AUD 12,600 USD 9,800 / EUR 8,000
Usage and attitude profiling (demographics, behaviour in the off/on-trade, choice cues, country health, brand health, closures)	Excel data table with gender and age crosstabs	GBP 2,500 / AUD 4,500 USD 3,500 / EUR 2,900
Bespoke questions (priced for English language, translations typically +£100 per q)	Excel data table	GBP 800 - 2,000 AUD 1,450 - 3,600 USD 1,100 - 2,800 EUR 900 - 2,750 per question (depending on complexity)

Vinitrac® specifics

Questionnaire length

Typically each survey includes a total of 40-50 questions including both the standard and client-specific modules, and takes 15-18 minutes for respondents to complete. Our experience and strong recommendation is that online surveys should not normally exceed 18 minutes maximum, to avoid the risk of respondent fatigue and thus possibly low-quality responses and low response rates.



Sampling methodology

Vinitrac® always uses quota sampling in order to ensure sample representativeness. This methodology is widely used in major market research companies across the world. It is widely acknowledged that some groups of consumers are more likely than others to answer surveys. Quota sampling helps market researchers compensate for this.

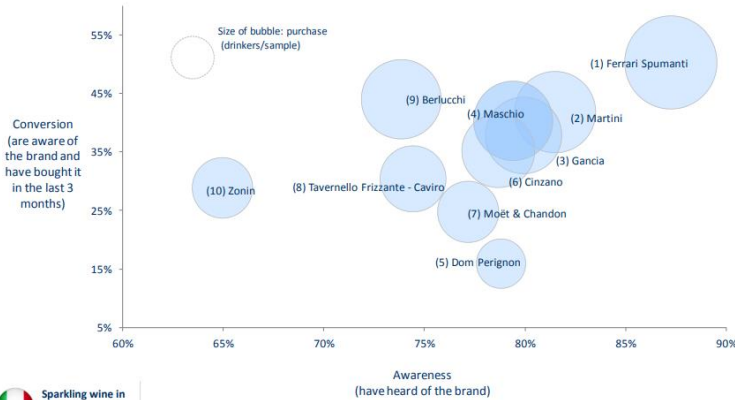
Sparkling brand power

Ferrari, Martini and Berlucchi are the best at converting awares into buyers



Brand power: Top 10 sparkling wine brands in Italy (by awareness)

Base= All drinkers of sparkling wine in Italy (n=999)



Source: Wine Intelligence, Vinitrac® Sparkling Italy, August '17, n=999 Italian annual drinkers of sparkling and light sparkling wines

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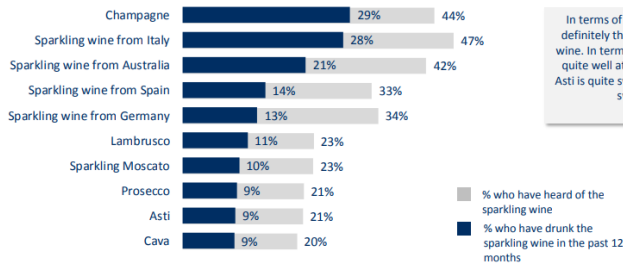
Sparkling wine awareness and consumption

Champagne and Italian sparkling wines are the most known and consumed sparkling wines in China



Prompted awareness and consumption of different sparkling wines

Base: All Chinese urban upper-middle class drinkers of sparkling wine (n=1,000)



In terms of awareness, Champagne is definitely the most successful sparkling wine. In terms of sales, Asti is performing quite well at the moment. It is because Asti is quite sweet and the Chinese prefer sweeter flavours.
Importer



Sparkling Wine in the Chinese Market 2018

Source: Wine Intelligence, Vinitrac® Sparkling China, October 2017, n=1,000 Chinese urban upper-middle class drinkers of sparkling wine

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Sparkling wine vs. other alcoholic beverages frequency

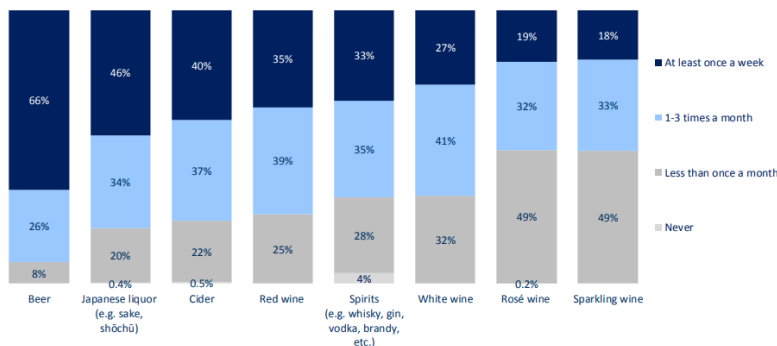
Two thirds of sparkling wine drinkers drink beer at least once a week, with sparkling wine being their least frequent beverage choice



Frequency of consumption for different alcoholic beverages

% who drink the following beverages at the following frequency

Base= All drinkers of sparkling wine in Japan who drink the following drinks



Source: Wine Intelligence, Vinitrac® Japan, March '17 (n=1,000) drinkers of sparkling wine in Japan

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Contact Wine Intelligence

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