

Playing the Region card: Profitable perspectives from key international wine markets

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Wine purchase: Region of origin is important, but alongside other choice cues



Source: Wine Intelligence, Vinitrac® Global, n≥1,000 regular wine drinkers in each market. % who considered the statements to be important or very important when choosing a bottle of wine

Region associations often revert to country associations, due to lack of familiarity

Rioja - I think of the history of Spain, the culture
Male, Mainstream-at-Homer, London

[I associate Côtes du Rhône with] this picture of lavender... Côtes du Rhône is French, or sounds French, so this is what I think of
Female, Generation Treater, London

Source: Focus groups with female Generation Treaters and male Mainstream-at-Homers, London, April 2011

Examples of region image association ...

... for Chianti in the UK :



Base: Have heard of the region
www.wordle.net

... for Marlborough in Australia:



Base: Have heard of the region
www.wordle.net

... for Napa Valley in the UK :



Source: Wine Intelligence, Vinitrac® Global, n≥1,000 regular wine drinkers in each market.

Open-ended question: "What first comes to mind when you think of this region?" (All those said they were aware of it) / www.wordle.net

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UK: Strong opportunity for new world wine if they overcome their low awareness



	Overall awareness	Purchase intent at mainstream price point among:		At high price point, among:
		All regular wine drinkers	Those aware of the region	Those aware of the region
1	Bordeaux	Rioja	Rioja	Marlborough
2	Burgundy	Bordeaux	Marlborough	Rioja
3	Chianti	Côtes du Rhône	Barossa Valley	Barossa Valley
4	Rioja	Chianti	Côtes du Rhône	Bordeaux
5	Côtes du Rhône	Burgundy	Napa Valley	Burgundy

Source: Wine Intelligence, Vinitrac® UK, n=1,016 all UK regular drinkers. Likely or very likely to buy wine from the following wine-producing regions at a mainstream price point (£4 - £4.99) and a high price (£8 or more)

USA: Dominated by domestic regions but opportunities for new world wines and Rioja



	Overall awareness	Purchase intent at mainstream price point among:		At high price point, among:
		All regular wine drinkers	Those aware of the region	Those aware of the region
1	Napa Valley	Napa Valley	Napa Valley	Napa Valley
2	Sonoma	Sonoma	Sonoma	Barossa Valley
3	Burgundy	Burgundy	Marlborough	Marlborough
4	Bordaux	Bordaux	Barossa Valley	Sonoma
5	Washington State	Washington State	Rioja	Rioja

Source: Wine Intelligence, Vinitrac® USA, n=1,006 all USA regular drinkers. Likely or very likely to buy wine from the following wine-producing regions at a mainstream price point (\$8-\$9.99) and a high price (\$15 or more)

Australia: Dominated by domestic regions but opportunity for Marlborough



	Overall awareness	Purchase intent at mainstream price point among:		At high price point, among:
		All regular wine drinkers	Those aware of the region	Those aware of the region
1	Hunter Valley	Barossa Valley	Barossa Valley	Margaret River
2	Barossa Valley	Margaret River	Marlborough	Barossa Valley
3	Margaret River	Hunter Valley	Margaret River	Marlborough
4	Yarra Valley	Yarra Valley	Hunter Valley	Hunter Valley
5	McLaren Valley	McLaren Valley	McLaren Valley	Yarra Valley

Source: Wine Intelligence, Vinitrac® Australia, n=1,018 all Australian regular drinkers. Likely or very likely to buy wine from the following wine-producing regions at a mainstream price point (\$A 10- A\$ 12) and a high price (\$A 20 or more)