



# UK LABEL DESIGN REPORT 2014

 JUNE 2014





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It is a well-known, but rarely admitted, fact that people shop with their eyes. Although we have all been told to ‘not judge a book by its cover’ it is almost instinctive human nature to do just the opposite. For wine this causes a bit of a problem. For many other products (let’s stick with our book example for now) consumers can get an idea about the product from flicking through the pages or reading a small section. For wine however, unless retailers provide tastings of every bottle on their shelves then consumers have nothing but the information and visual cues provided by the labels to base their purchase decisions on.

The aim of this study was to test the appeal of commonly found label categories in the UK wine market, to see which connect and engage with the consumer. The natural starting point for such a project was the shop floor; many of which were visited to identify key similarities and therefore ‘segment’ the vast array of labels which are currently available into easy to understand groups based around common characteristics or a theme. The ten groups used for this study represent an update of the labels used in our 2011 UK labels report with current trends that we are seeing in the market.

Together with [Amphora](#) – wine label design specialists – we developed a set of labels to illustrate the core defining features of each category which ranged from the traditional “Prestigious” & “Stately” through to the modern and even playful “Light Hearted” & “Text Impact”. These ten labels were then tested in our online survey with over 1,000 UK regular wine drinkers, to measure attractiveness, quality, price perceptions, likelihood to buy (formal and informal occasions) and imagery associations.

So what did we find? Firstly, the label design which almost universally came out on top across all measures was “Prestigious” The traditional look and extensive use of black and gold elicited strong quality cues and higher price perceptions and also gave this design a very clear market position as being for formal occasions only. One of the top performing designs from the 2011 report “Stately” seemed to have lost traction in the UK market, being surpassed by the more modern design categories of “Themed” and “Contemporary”. Unlike “Prestigious” these label categories had very broad appeal across both formal and informal events and could almost be seen as wines to suit any occasion, which is potentially both an advantage (large market potential) and a limitation (unclear market position).

At the other end of the scale were some of the more modern categories such as “Eclectic, “Light Hearted” and “Text Impact”. Although some of these designs were seen as fun and approachable they also drew stronger associations with negative aspects such as cheap, immature and overall lacking in quality. That is not to say that these designs were not without their fans with “Eclectic” testing well with the younger demographic (18-34) for informal occasions.

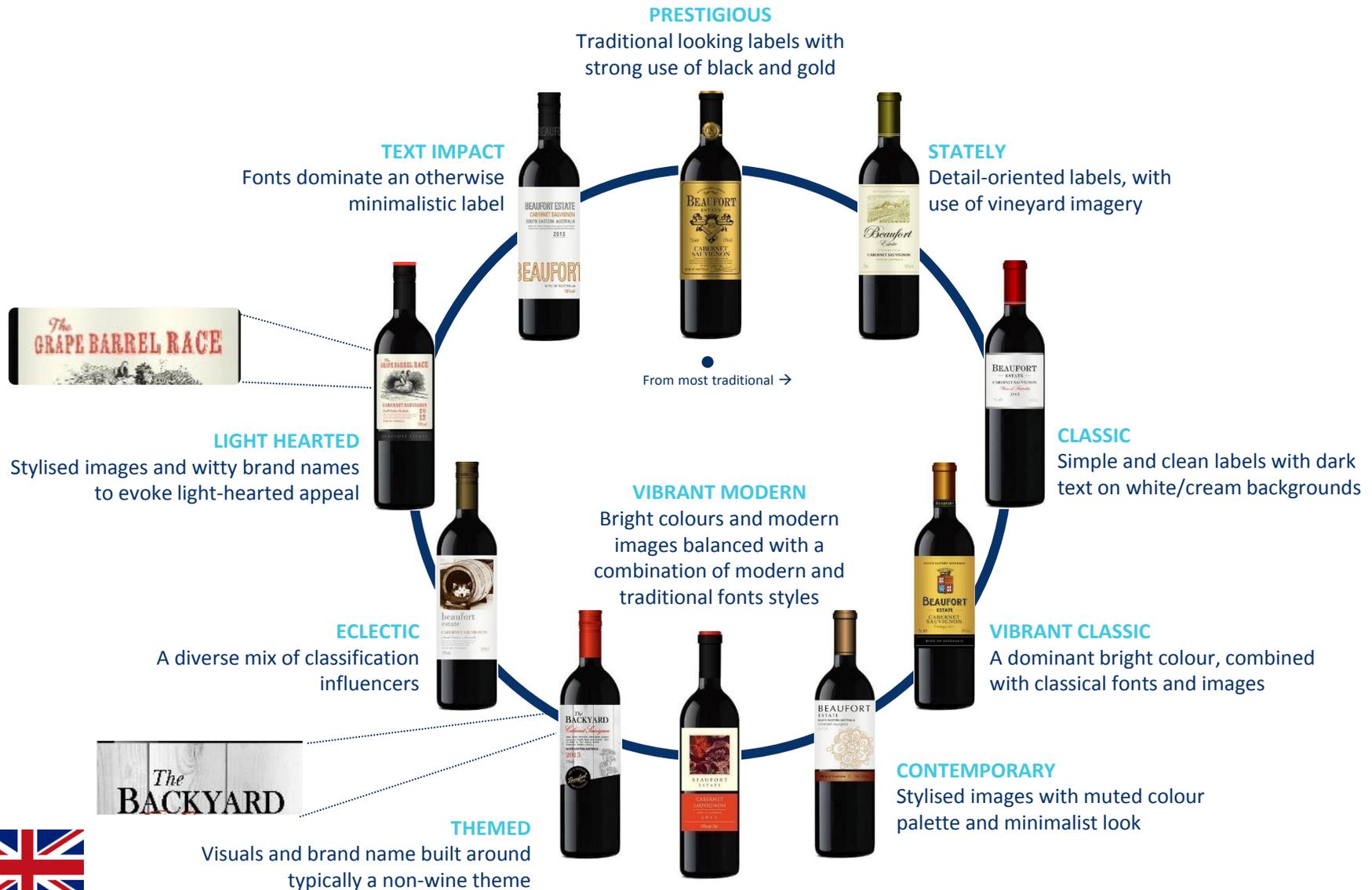
So does this mean that the UK market fits the stereotype of traditional, conservative wine drinkers rejecting anything new? Well, no. Many of the more modern designs have been on the UK market for a comparatively short time and have yet to find their feet compared to their traditional counterparts. They are gaining some traction with the new, younger consumer which could lead to the tastes of the market changing in the future. Watch this space.

*Stephen Lacey*  
*Research Manager*



- Management Summary

# Wine Intelligence wine label categories in the UK market: Overview of the 10 categories



# Performance of label categories with UK consumers

## Summary of findings



Top performing labels

	<b>PRESTIGIOUS</b> Trustworthy design, consistently stands out as a top favourite across all measures except for informal occasions		<b>THEMED</b> Second highest ranking across measures overall, accepted for both informal and formal occasions		<b>CONTEMPORARY</b> Despite low attractiveness and quality measures, seen as suitable across all occasions, mostly preferred by women		<b>STATELY</b> Broad appeal across all attractiveness and quality yet fails to stand out as a brand that would be purchased
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Average performing labels

	<b>CLASSIC</b> Simple and clean label design, performs average across measures		<b>VIBRANT MODERN</b> Bold use of colour considered to be attractive but regarded as lower quality than the average		<b>VIBRANT CLASSIC</b> Positive ranking on attractiveness and quality, though sits as less likely to be bought across occasions
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Lower performing labels

	<b>ECLECTIC</b> Quirky, intriguing but risky label, brings appeal for some, mostly for informal occasions with younger consumer groups		<b>LIGHT HEARTED</b> Conveys subtle humour and good visual cues yet ranks second to last across all measures		<b>TEXT IMPACT</b> Strong graphic communication yet lowest ranking across measures, label lacks strong wine quality cues, some appeal for women for informal occasions
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# Summary of response to labels: scorecard overview

## Labels displayed in order of overall ranking

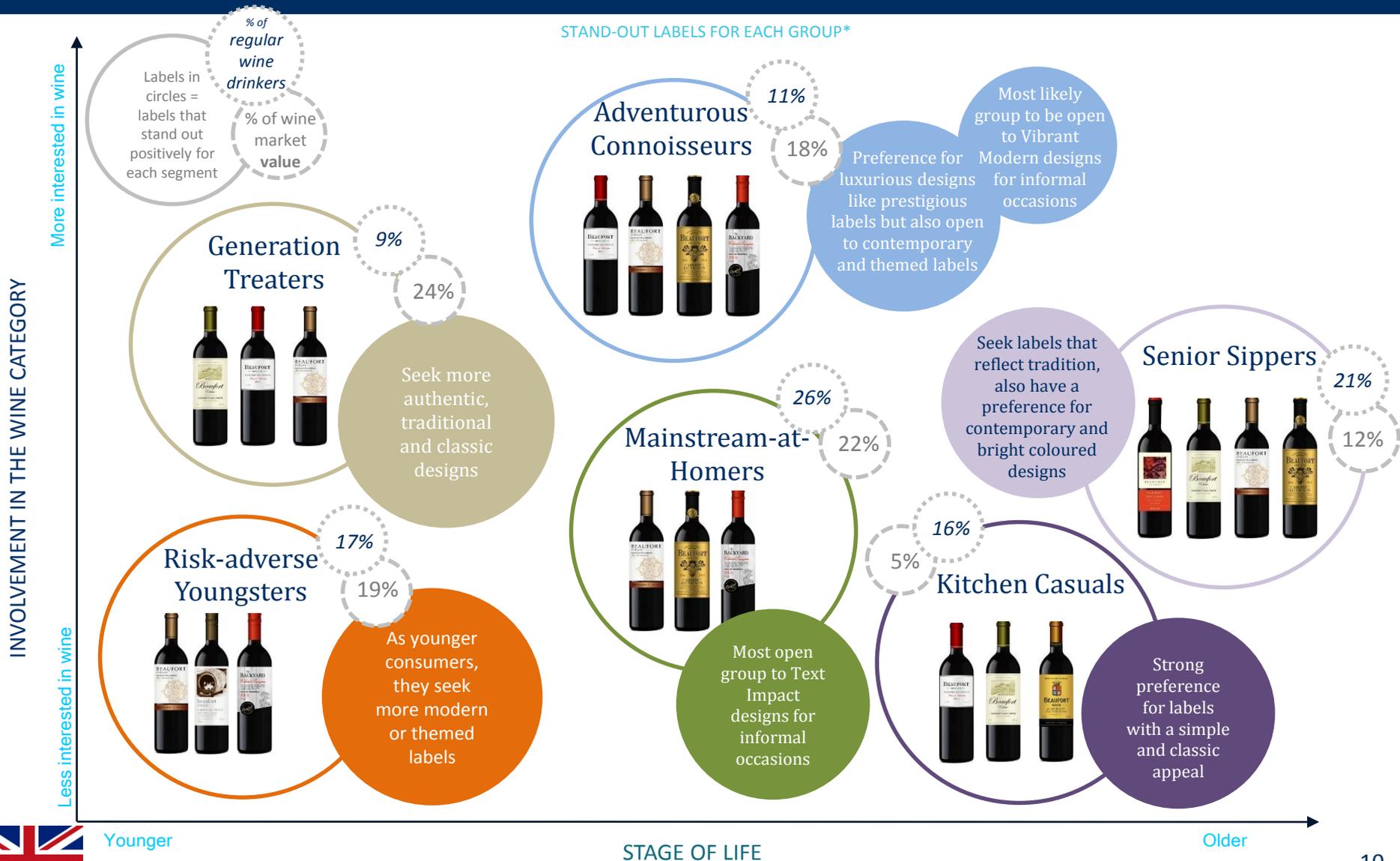


Label name	Label tested	Label category description	Attractive	Quality	Price	Likelihood to buy informal	Likelihood to buy formal
Prestigious		<i>Traditional looking labels with strong use of black and gold</i>	1	1	1	8	1
Themed		<i>Visuals and brand name built around one subject</i>	4	2	2	2	3
Contemporary		<i>Stylised images with muted colour palette and minimalist look</i>	3	5	6	1	2
Stately		<i>Detail-oriented labels, with use of vineyard imagery</i>	2	3	3	5	4
Classic		<i>Simple and clean labels with dark text on white/cream backgrounds</i>	6	4	5	4	5
Vibrant Modern		<i>Bright colours and modern images balanced with a combination of modern and traditional fonts styles</i>	5	8	9	3	6
Vibrant Classic		<i>A dominant bright colour, combined with classical fonts and images</i>	7	6	4	9	8
Eclectic		<i>A diverse mix of classification influencers</i>	8	7	8	6	7
Light hearted		<i>Stylised images and witty brand names to evoke light-hearted appeal</i>	9	9	7	10	9
Text impact		<i>Fonts dominates an otherwise minimalistic label</i>	10	10	10	7	10



# Which labels work best for different consumer segments?

## Wine Intelligence UK Portrait segmentation



\*Stand out labels selected based on qualitative overview of response to measures and relative positioning of label categories

# Which labels work best for different consumer segments?

## Gender & age



STAND-OUT LABELS FOR EACH GROUP\*



Prestigious design is prominent for formal occasions for both genders although women connect more with Contemporary

### TOP LABELS FOR MEN



Women are more likely to be open to Text Impact for informal occasions whereas men continue to reject it

### TOP LABELS FOR WOMEN



### TOP LABELS FOR YOUNGER CONSUMERS



Contemporary label design tends to connect better with younger consumers



Although older consumers are open to this style for more informal occasions

### TOP LABELS FOR OLDER CONSUMERS



\*Top labels selected based on qualitative overview of response to measures and relative positioning of label categories



- Understanding the wine label categories

# Wine Intelligence wine label categories in the UK market:

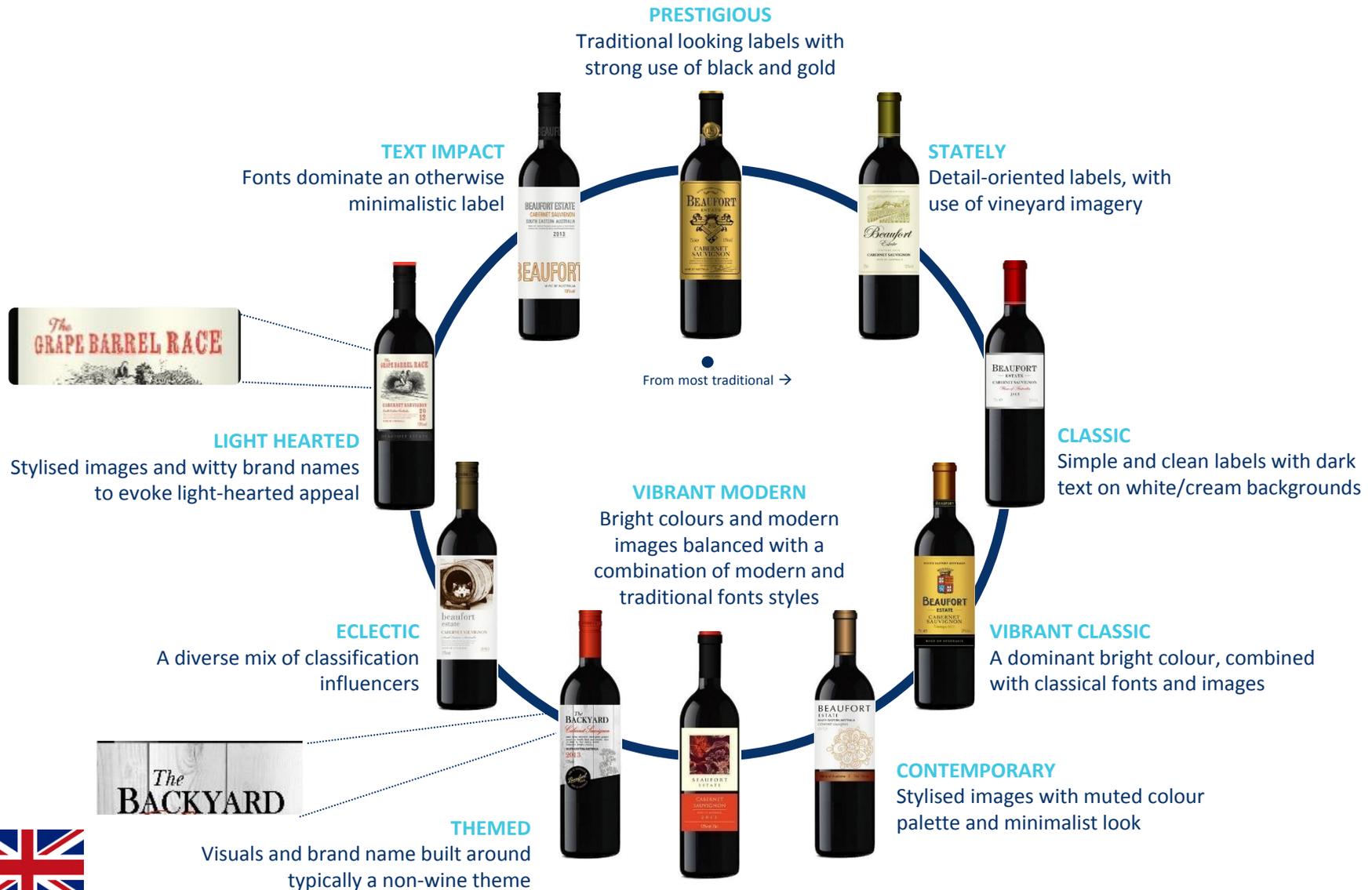
From a consumer perspective, wine labels in the UK fall into 10 distinctive categories



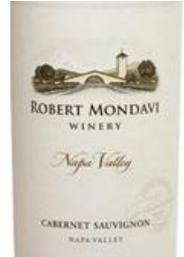
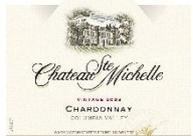
**Classic**   **Contemporary**   **Eclectic**   **Light Hearted**   **Prestigious**   **Stately**   **Text Impact**   **Themed**   **Vibrant Classic**   **Vibrant Modern**



# Wine Intelligence wine label categories in the UK market: Overview of the 10 categories



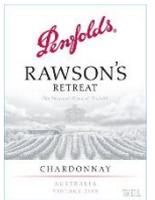
# Wine Intelligence wine label categories in the UK market: Overview of the 10 categories



**ECLECTIC**  
A diverse mix of classification influencers

**STATELY**  
Detail-oriented labels, with use of vineyard imagery

**CLASSIC**  
Simple and clean labels with dark text on white/cream backgrounds

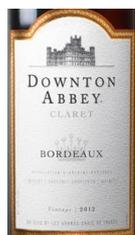
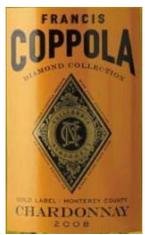
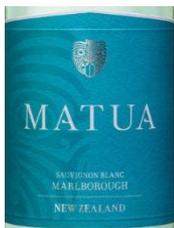
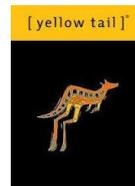


**LIGHT HEARTED**  
Stylised images and witty brand names to evoke light-hearted appeal

**THEMED**  
Visuals and brand name typically a non-wine theme

**VIBRANT MODERN**  
Bright colours and modern images balanced with a combination of modern and traditional fonts styles

**VIBRANT CLASSIC**  
A dominant bright colour, combined with classical fonts and images



# Introducing the label categories

In the following slides we describe each category based on key design elements



The nine label categories are classified by the following influencers

Classification influencer	Exemplary group characteristic
<b>Colour</b>	Combination of: <ul style="list-style-type: none"><li>▪ Colours themselves</li><li>▪ The number of colours used</li><li>▪ Proportion of colour used/label size</li></ul>
<b>Rendering</b>	How illustrations and symbols are displayed, e.g.: line drawings / etchings / watercolours
<b>Image</b>	The type of symbols, pictures and illustrations used, e.g.: <ul style="list-style-type: none"><li>▪ Cultural symbols</li><li>▪ National/regional symbols</li><li>▪ Symbolic inference</li></ul>
<b>Typography</b>	<ul style="list-style-type: none"><li>▪ Size of font used</li><li>▪ Font types</li><li>▪ Combination of fonts</li><li>▪ Font colour used</li></ul>
<b>Text</b>	<ul style="list-style-type: none"><li>▪ Amount of text</li><li>▪ Position of text</li><li>▪ Meaning of words</li><li>▪ Language</li><li>▪ Names</li></ul>



# DEFINING THE CATEGORY

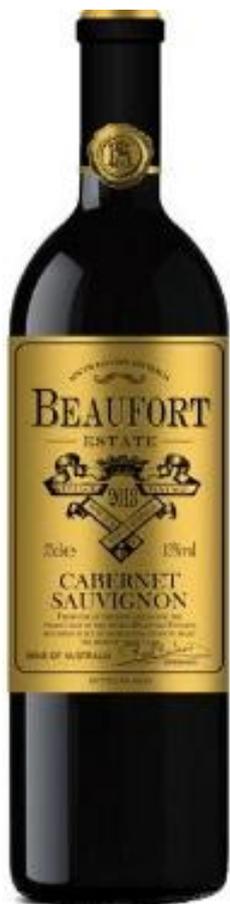
## Prestigious



Prestigious Themed Contemporary Stately Classic Vibrant Modern Vibrant Classic Eclectic Light Hearted Text Impact

### Dominant characteristics

- Use of black and gold, and minimal use of other colours
- Heavy use of text
- Limited use of images - typically confined to heraldry or wine estate style buildings or vineyards, symbolising authentic and high quality wine



Classification influencer	Exemplary group characteristic
Colour	Heavy use of black and metallic colours, particularly gold, occasionally set against a cream background and with an accent colour such as red
Rendering	Occasional use of line drawings (non-photorealistic rendering)
Image	Crests / heraldry, châteaux,
Typography	Variety of font sizes and styles, Serif font, upper case lettering, use of signature
Text	Heavy use of text dominates label, clear winery or brand name with varietal or region and vintage

### Example brands



# DEFINING THE CATEGORY

## Themed



Prestigious Themed Contemporary Stately Classic Vibrant Modern Vibrant Classic Eclectic Light Hearted Text Impact

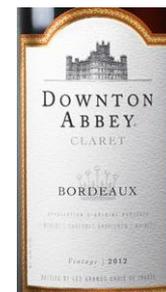
### Dominant characteristics

- All elements of the label centred around a theme which is typically based on a social event, experience or hobby



Classification influencer	Exemplary group characteristic
Colour	Any – limited colour palate chosen to best reflect the theme
Rendering	Any – again, dependent on the theme
Image	Any – dependent on the theme
Typography	Distinct and stylised to reflect the sentiment of the theme
Text	Any – dependent on the theme

### Example brands



# DEFINING THE CATEGORY

## Contemporary



Prestigious Themed **Contemporary** Stately Classic Vibrant Modern Vibrant Classic Eclectic Light Hearted Text Impact



### Dominant characteristics

- Muted colour palette, often cream and metallic
- Stylised labels with a clean overall appearance
- Contemporary patterns and / or stylised images, which are often based on nature

Classification influencer	Exemplary group characteristic
Colour	Neutral colour palette of creams and metallic (golden, bronzes) accented with natural shades such as burgundy, burnt reds or greens
Rendering	Non-photorealistic images, stencil effects and abstract type images
Image	Stylised landscapes and images of nature, contemporary patterns
Typography	Variety of serif and sans serif fonts, often stylised to enhance stand out of brand names
Text	Quantity of text typically kept to a minimum to convey a cleaner, more contemporary feel

### Example brands



# DEFINING THE CATEGORY

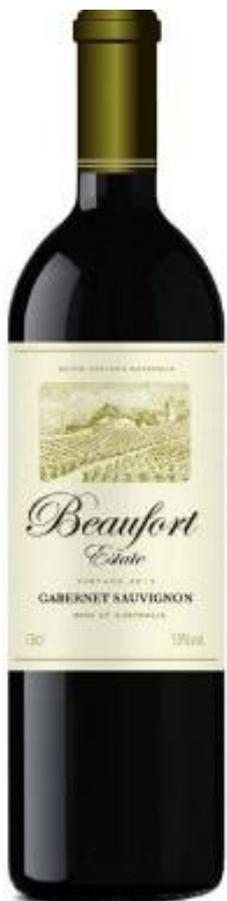
## Stately



Prestigious Themed Contemporary **Stately** Classic Vibrant Modern Vibrant Classic Eclectic Light Hearted Text Impact

### Dominant characteristics

- Detail-oriented through use of image, typography and borders to create a sense of heritage and sophistication
- Line drawings of vineyards / wine estates
- Limited colour palettes, predominantly creams



Classification influencer	Exemplary group characteristic
Colour	Neutral colour palette of creams typically highlighted with metallic, blacks and reds
Rendering	Delicate line drawings
Image	Traditional-looking vineyard images, often with detailed borders
Typography	Predominantly black, serif fonts
Text	Vineyard / brand name dominates, contrasted with smaller detailed text

### Example brands



# DEFINING THE CATEGORY

## Classic



- Prestigious
- Themed
- Contemporary
- Stately
- Classic**
- Vibrant Modern
- Vibrant Classic
- Eclectic
- Light Hearted
- Text Impact



### Dominant characteristics

- Simple white / cream labels which have an overall clean look
- Limited use of images
- Use of serif fonts to maintain classic feel

Classification influencer	Exemplary group characteristic
Colour	Limited colour palette: predominantly white label with black detail and a brighter accent colour such as red
Rendering	If used, line drawings typically simple and relatively small. Embossing may be used to add a classic feel
Image	Very few images used, but occasionally landscapes and monograms
Typography	Mainly black font, but some use of brighter accent colours (typically highlighting the brand or varietal). Serif fonts, some use of italics, capital letters and numbers
Text	Presence of text used to add visual perception of quality. Wine name and varietal dominate

### Example brands



# DEFINING THE CATEGORY

## Vibrant Modern



Prestigious Themed Contemporary Stately Classic **Vibrant Modern** Vibrant Classic Eclectic Light Hearted Text Impact

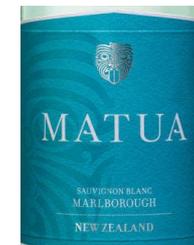
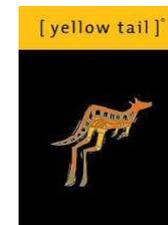
### Dominant characteristics

- Bright use of colour within a limited palette
- Contemporary images
- Limited text



Classification influencer	Exemplary group characteristic
Colour	Bright colours often contrasted with black and cream
Rendering	Non-photorealistic rendering, modern and abstract images
Image	Stylised images of a variety of subjects such as animals, nature, landscapes, scenes and modern art
Typography	Variety of font styles, colours and sizes, predominantly in black or white
Text	Minimal use of text – wine name, varietal, region / country and perhaps vintage

### Example brands



# DEFINING THE CATEGORY

## Vibrant Classic



Prestigious   Themed   Contemporary   Stately   Classic   Vibrant Modern   **Vibrant Classic**   Eclectic   Light Hearted   Text Impact



### Dominant characteristics

- Bold use of one dominant bright colour
- Overall traditional / classic feel to the style and structure of the label

Classification influencer	Exemplary group characteristic
Colour	Bright, bold use of one main colour that dominates the label, contrasted with a darker, subtler accent colour such as black, deep red
Rendering	Stamped images and sketches
Image	Occasionally simple traditional images such as heraldry and crests may be used
Typography	Combination of both serif and sans serif fonts
Text	Text used to establish the traditional balance of the label – varietal, region/country and brand name clearly stated with extra detail occasionally e.g. In native language

### Example brands



# DEFINING THE CATEGORY

## Light Hearted

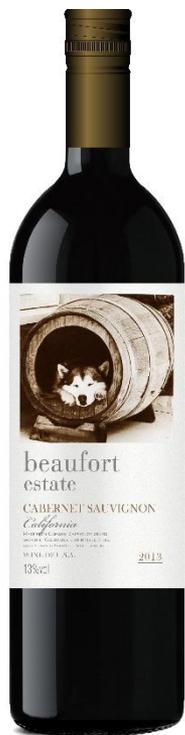


Prestigious Themed Contemporary Stately Classic Vibrant Modern Vibrant Classic Eclectic Light Hearted Text Impact

### Dominant characteristics

- Strong and diverse characteristics that evade classification into any of the aforementioned categories

The example we have used in this test, is based on a growing category of labels which have a dominant photo image



Classification influencer	Exemplary group characteristic
Colour	Any, but typically several colours used
Rendering	Any
Image	Any
Typography	Any
Text	Any

### Example brands



# DEFINING THE CATEGORY

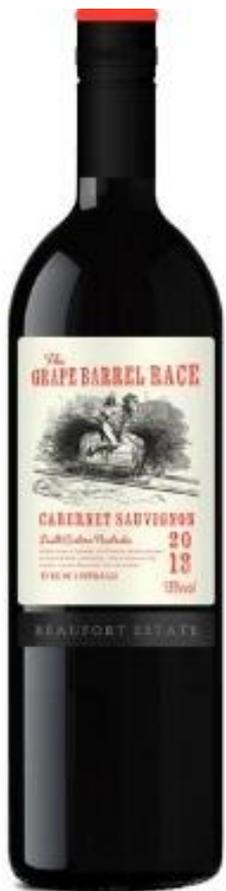
## Light Hearted



- Prestigious
- Themed
- Contemporary
- Stately
- Classic
- Vibrant Modern
- Vibrant Classic
- Eclectic
- Light Hearted**
- Text Impact

### Dominant characteristics

- Witty combination of brand name and image
- Attention-grabbing stylised image



Classification influencer	Exemplary group characteristic
Colour	Any
Rendering	Often cartoon-like effect
Image	Striking images including people, animals, buildings, scenery – often alluding to cultural references
Typography	Any
Text	Brand name and / or varietal dominates and connect with the image in a humorous way

### Example brands



# DEFINING THE CATEGORY

## Text Impact



Prestigious Themed Contemporary Stately Classic Vibrant Modern Vibrant Classic Eclectic Light Hearted **Text Impact**

### Dominant characteristics

- Clean labels dominated by text arranged in a striking way



Classification influencer	Exemplary group characteristic
Colour	Striking text colour against a muted, typically white / cream background
Rendering	Rarely has images
Image	Rarely has images
Typography	Bold variety of font styles and sizes
Text	Dominates the label either with the simple isolation of a few words or with the overpowering and artistic arrangement of lots of words

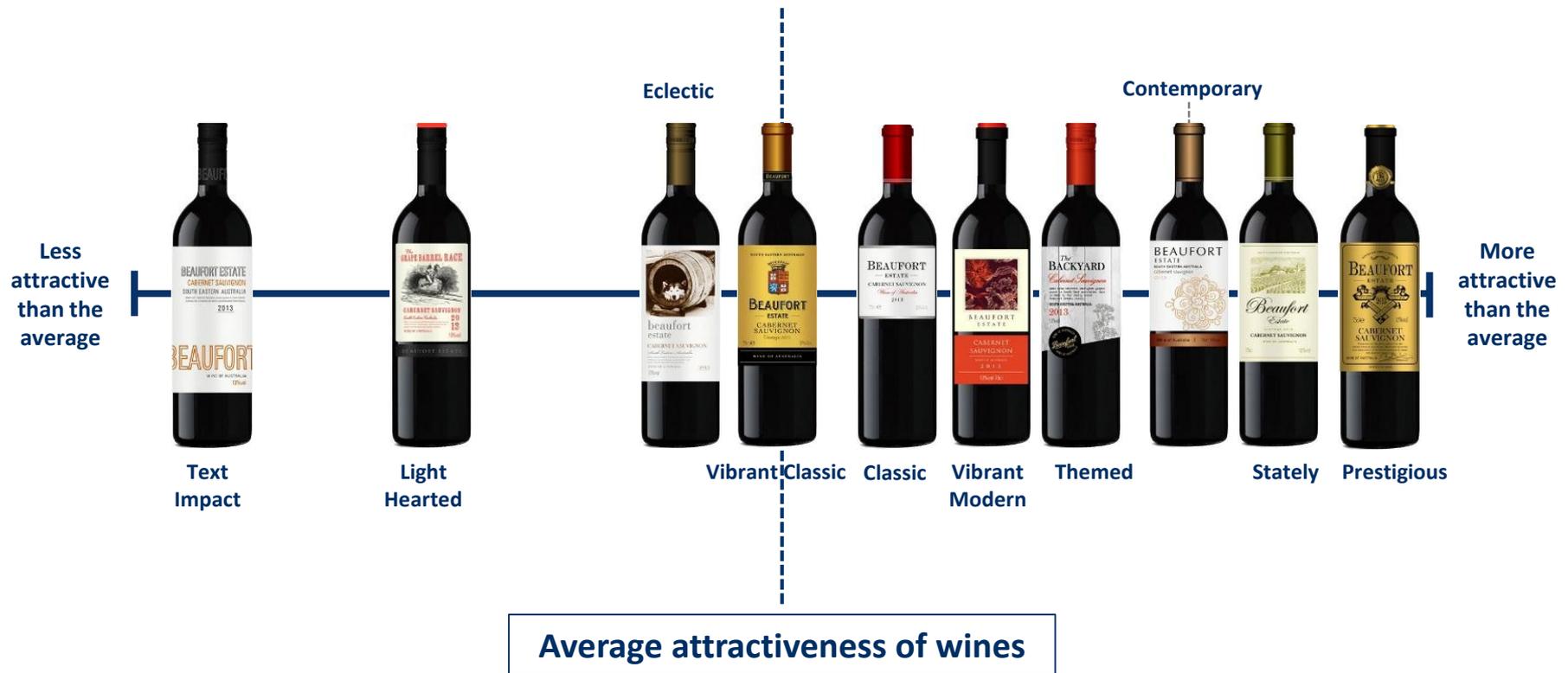
### Example brands



- How different label categories perform
  - Profiling by gender, age and channels across:
    - Attractiveness
    - Perceived quality
    - Expected price
    - Likelihood to buy

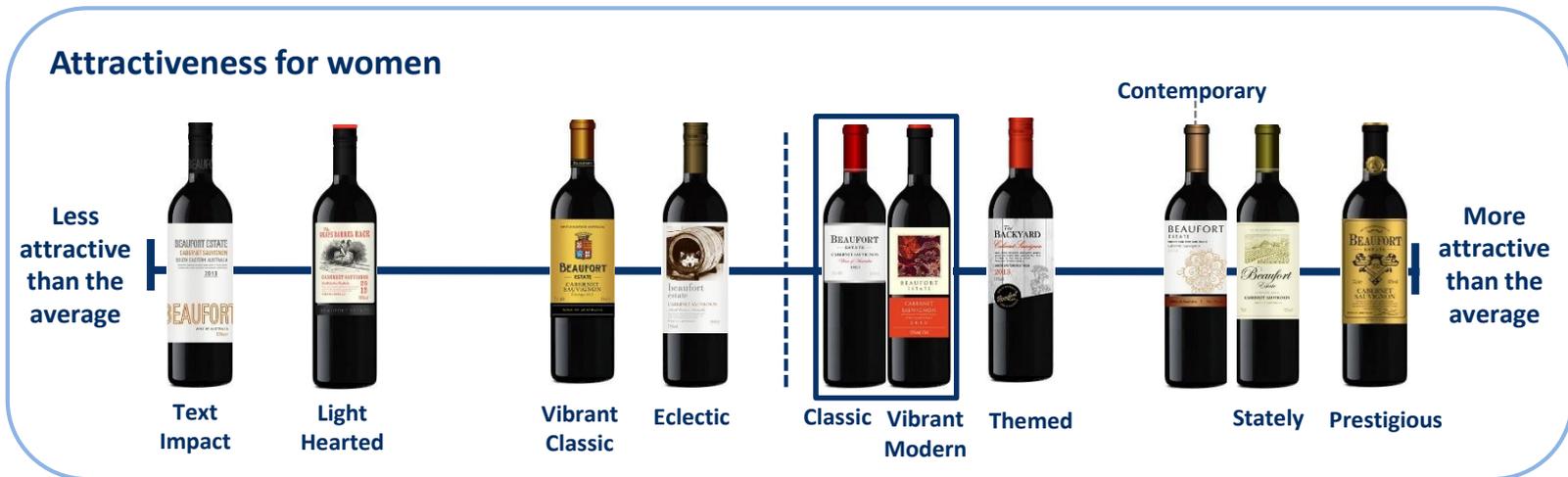
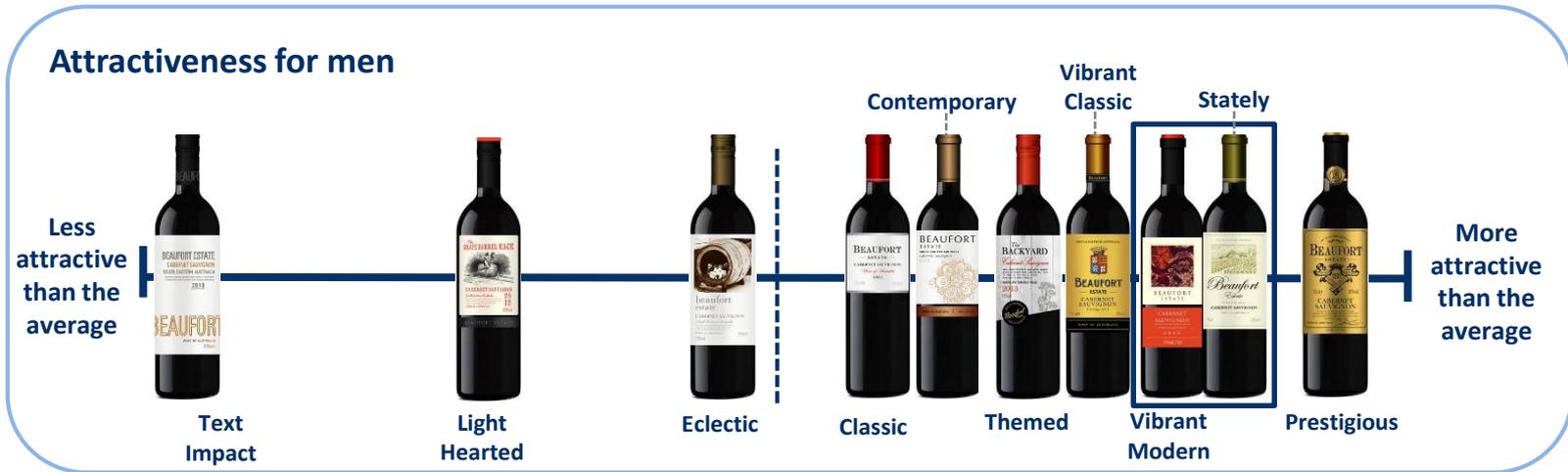
# Overall attractiveness of labels: Traditional and elegant labels, with vineyard and winery associations and images are considered the most attractive

## Attractiveness of wines for all UK regular wine drinkers



\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Attractiveness of labels by gender: Similar labels at both ends of the scale for both genders - Vibrant Classic fails to connect with female wine drinkers

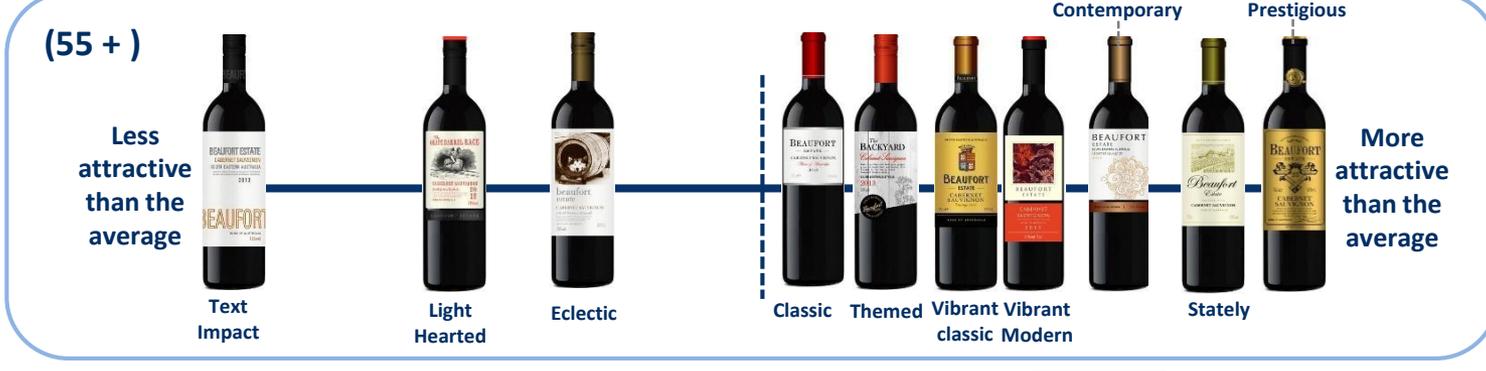
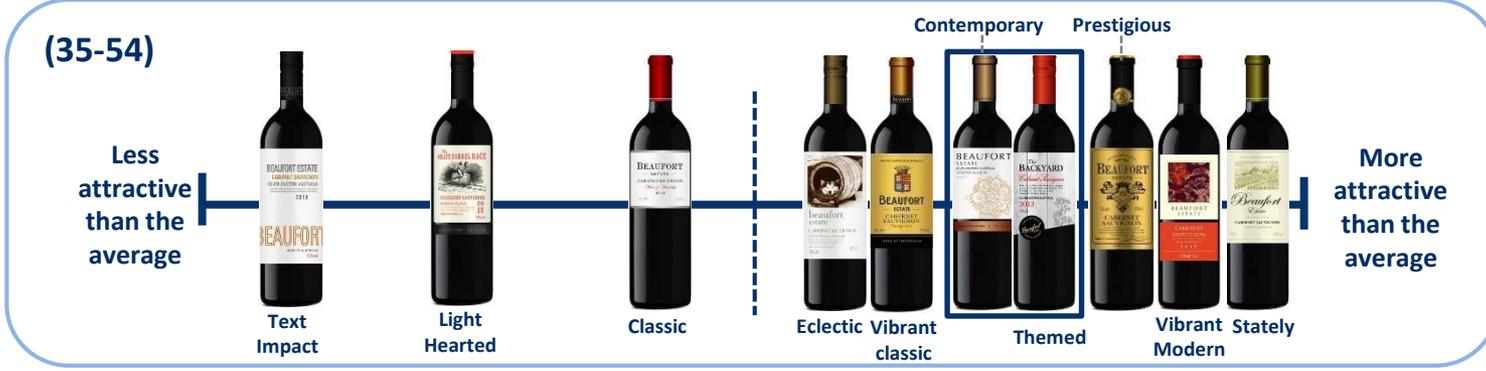


Outlined labels have same position from the average



\*Note: Dotted line represents the average point of each continuum.  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Attractiveness of labels by age: As age increases the prominence of traditional style labels (Prestigious/Stately) is noticeable

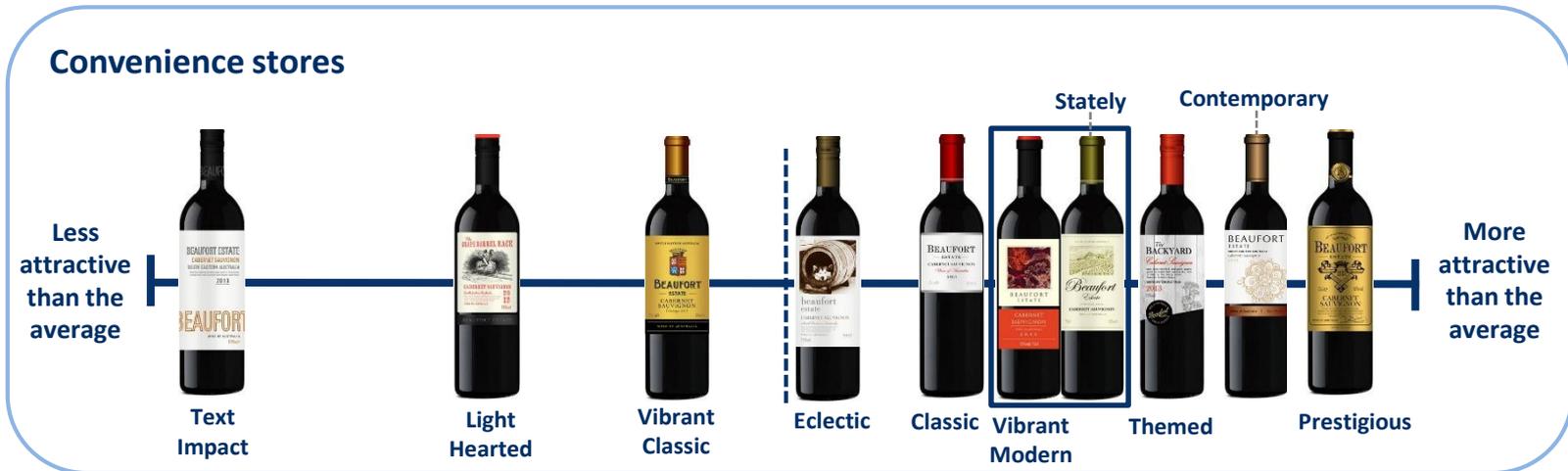
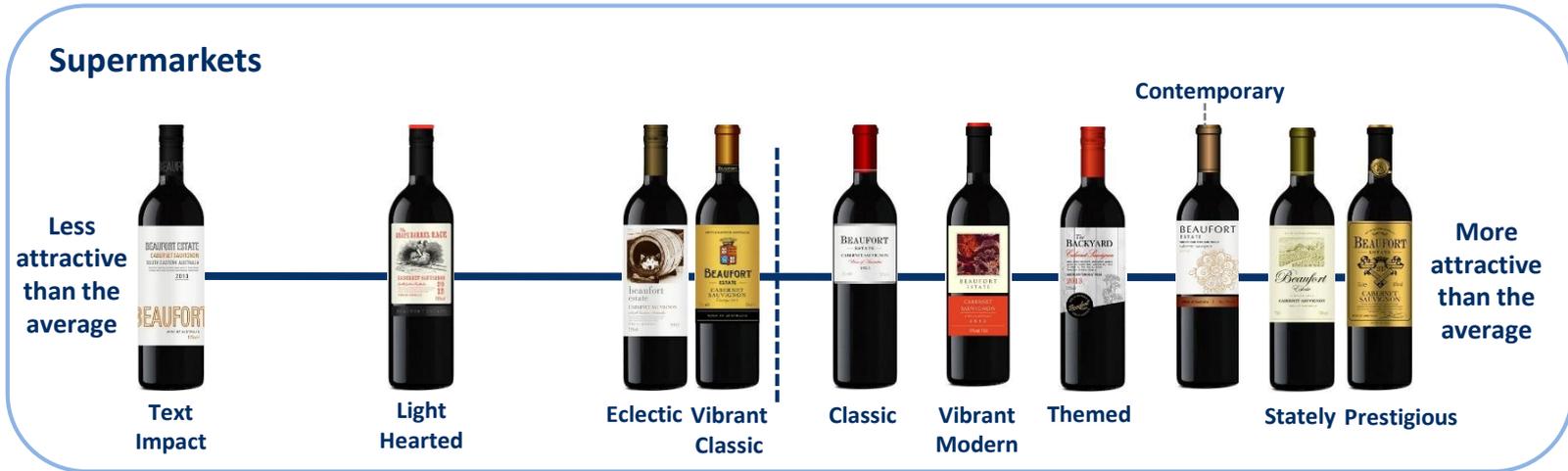


Outlined labels have same position from the average

\*Note: Dotted line represents the average point of each continuum

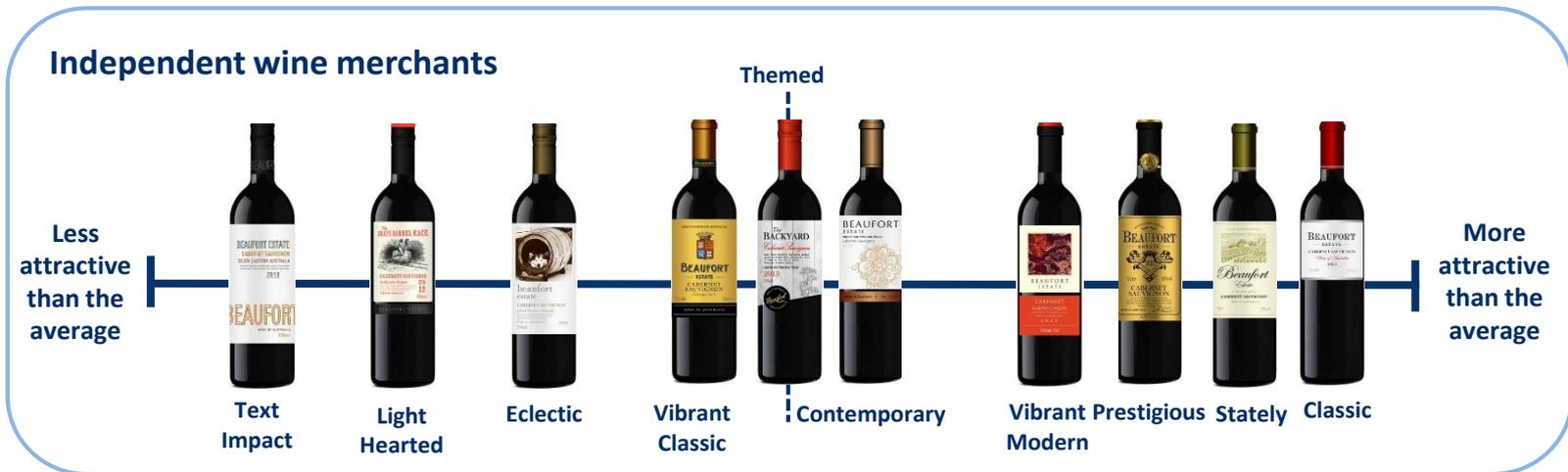


# Attractiveness of labels by channels: Very similar positioning of labels between supermarkets and convenience stores



\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Attractiveness of labels by channels: Modern style labels such as contemporary and Themed have a strong appeal to online consumers; wine merchant consumers more conservative



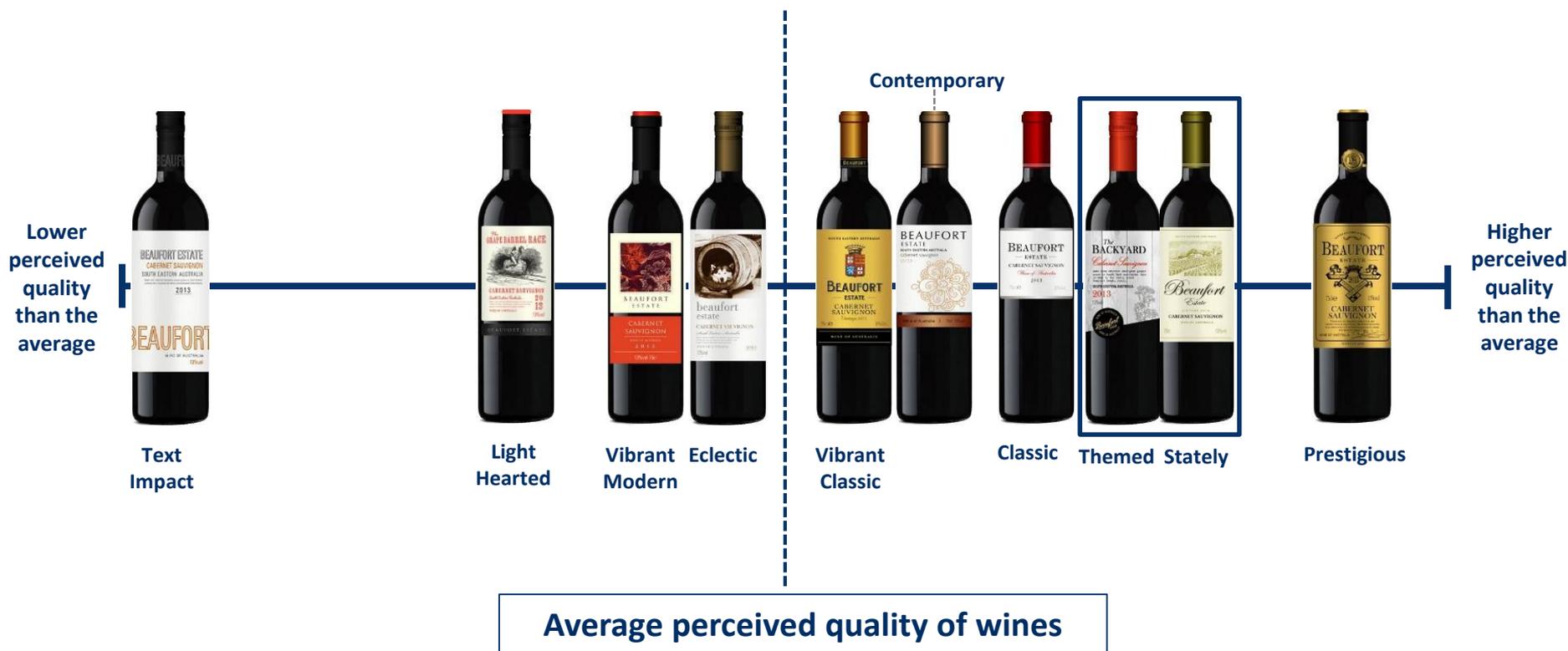
\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

- How different label categories perform
  - Profiling by gender, age and channels across:
    - Attractiveness
    - Perceived quality
    - Expected price
    - Likelihood to buy

# Overall quality perception of labels: Prestigious and Text Impact create opposite positions for quality perception; more modern designs tend to fall below the average



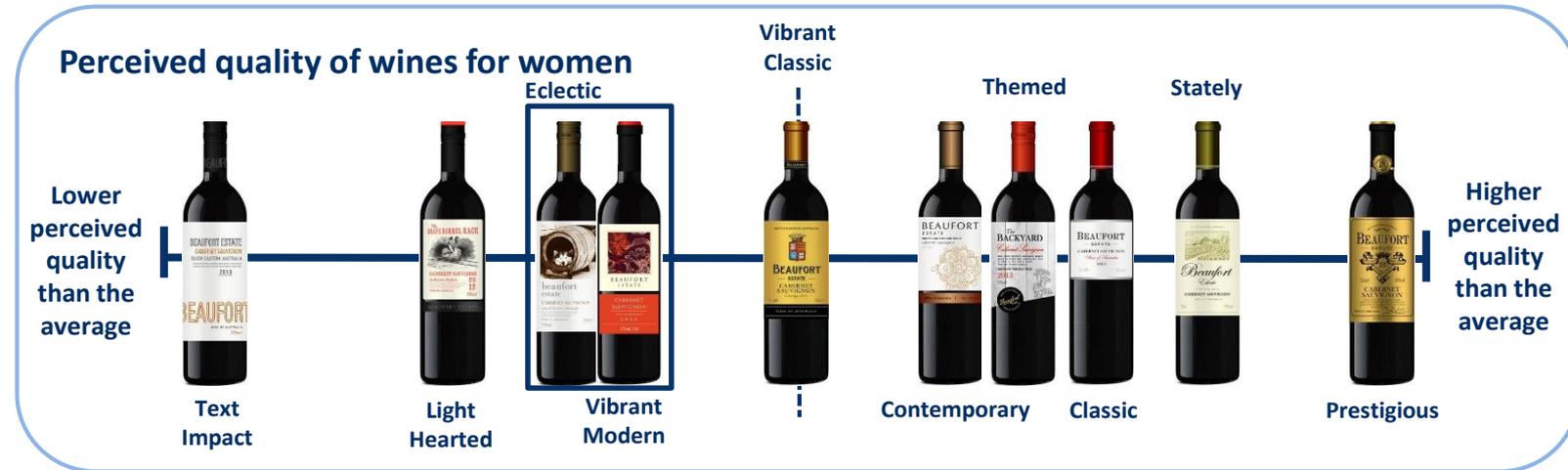
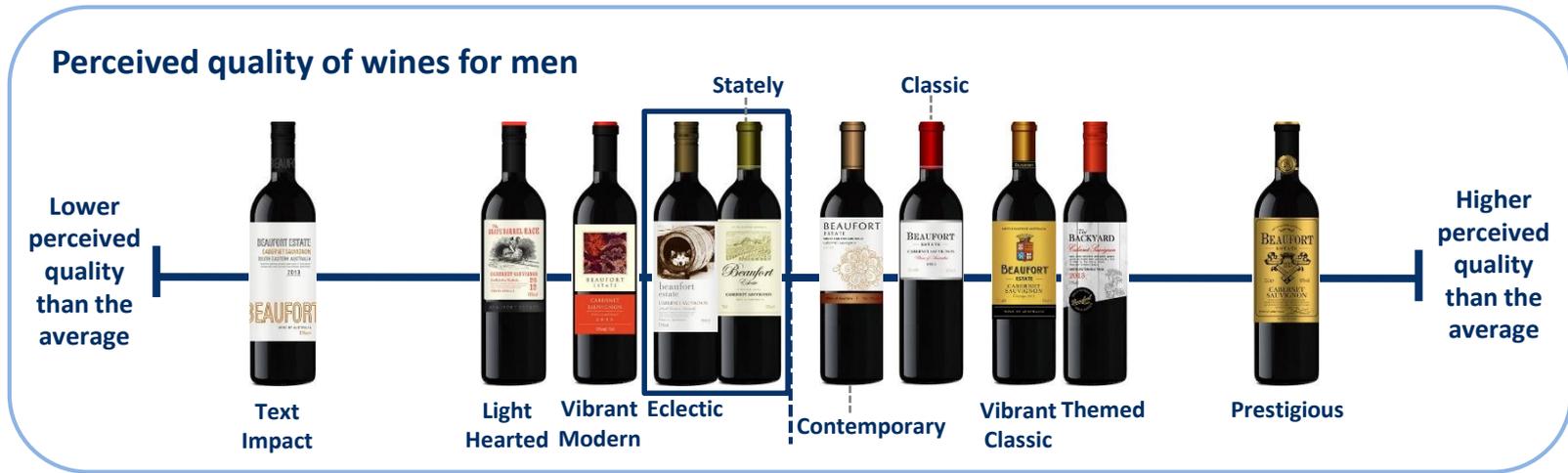
Perceived quality of wines for all UK regular wine drinkers



Outlined labels have same position from the average

\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Perceived quality of labels by gender: Similar perceived quality perceptions between the genders; Vibrant Classic and Stately taking up opposite positions between men and women

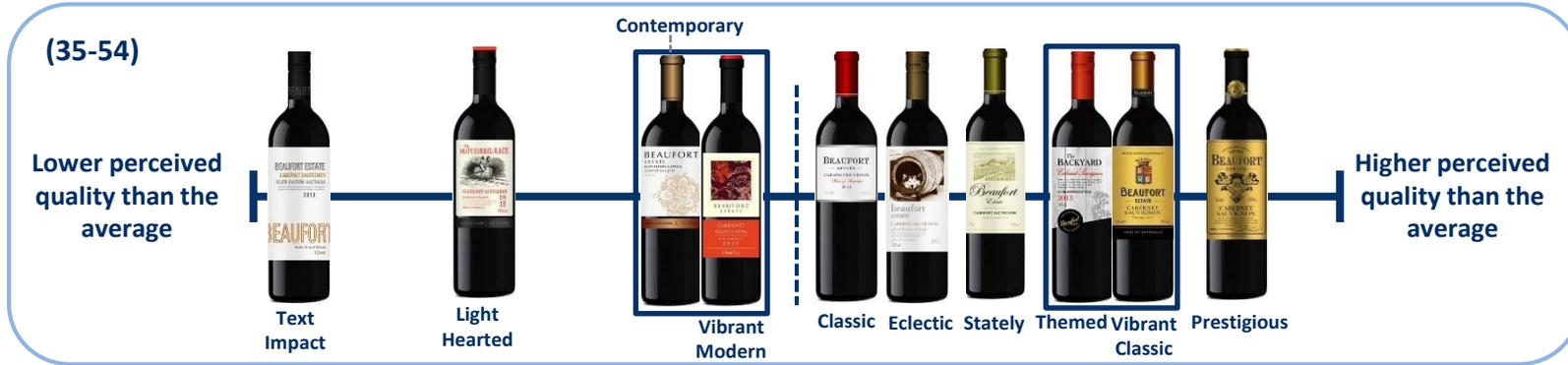
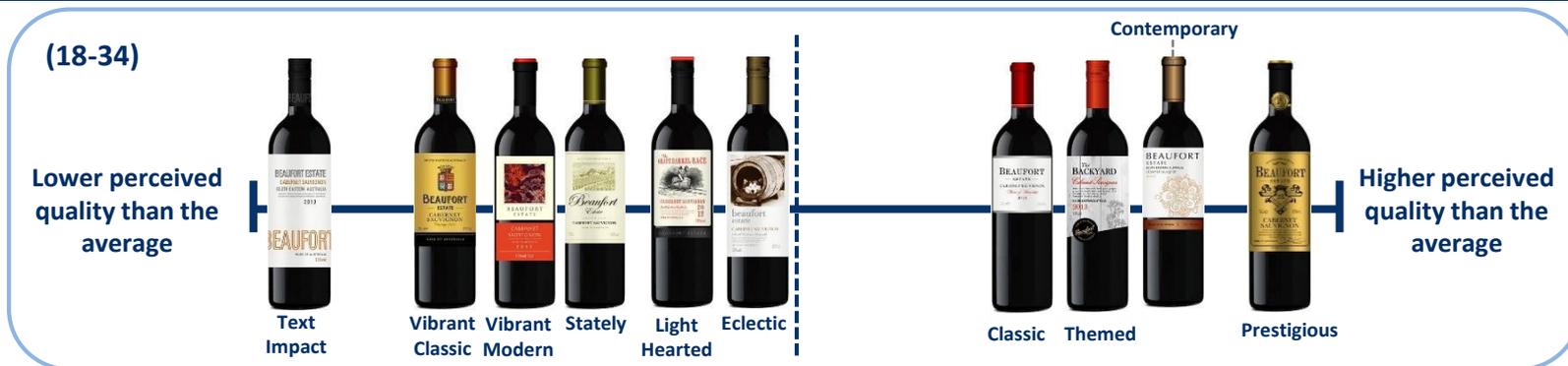


Outlined labels have same position from the average

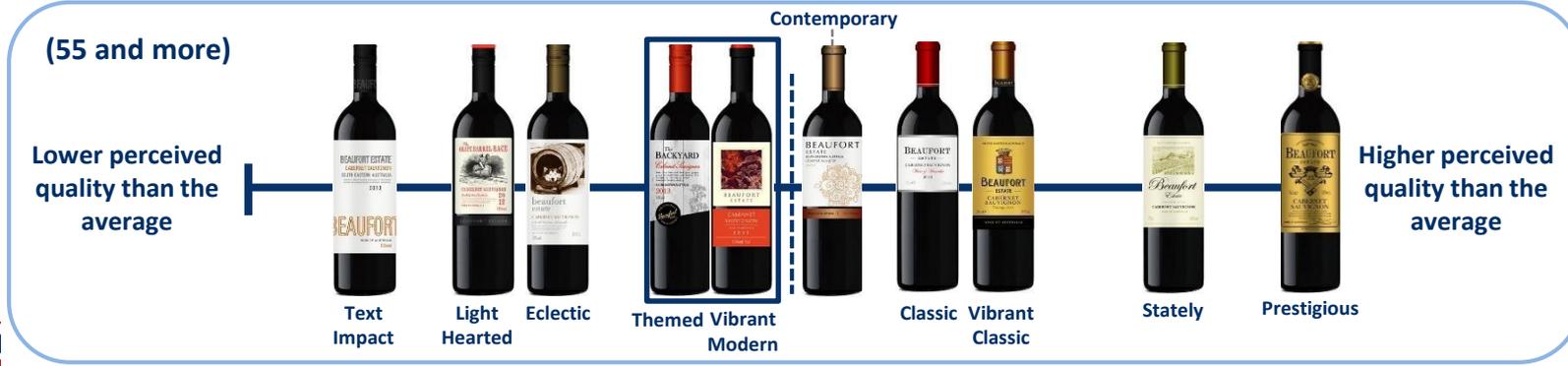


\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Perceived quality of labels by age: For quality Prestigious comes out top across the board, Contemporary design connects better with younger consumers



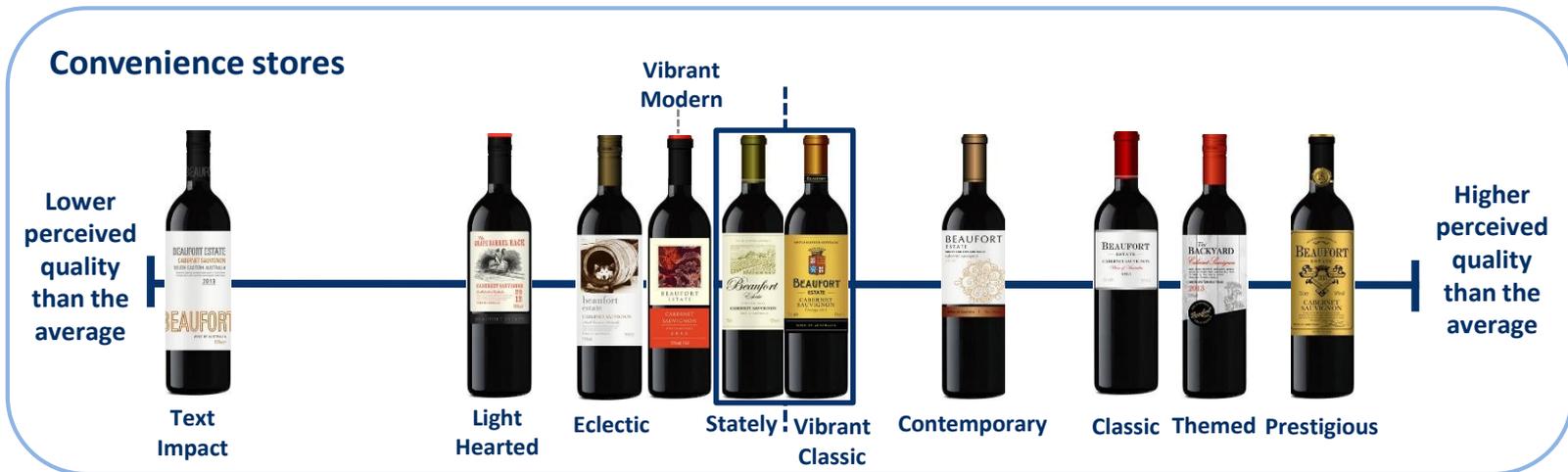
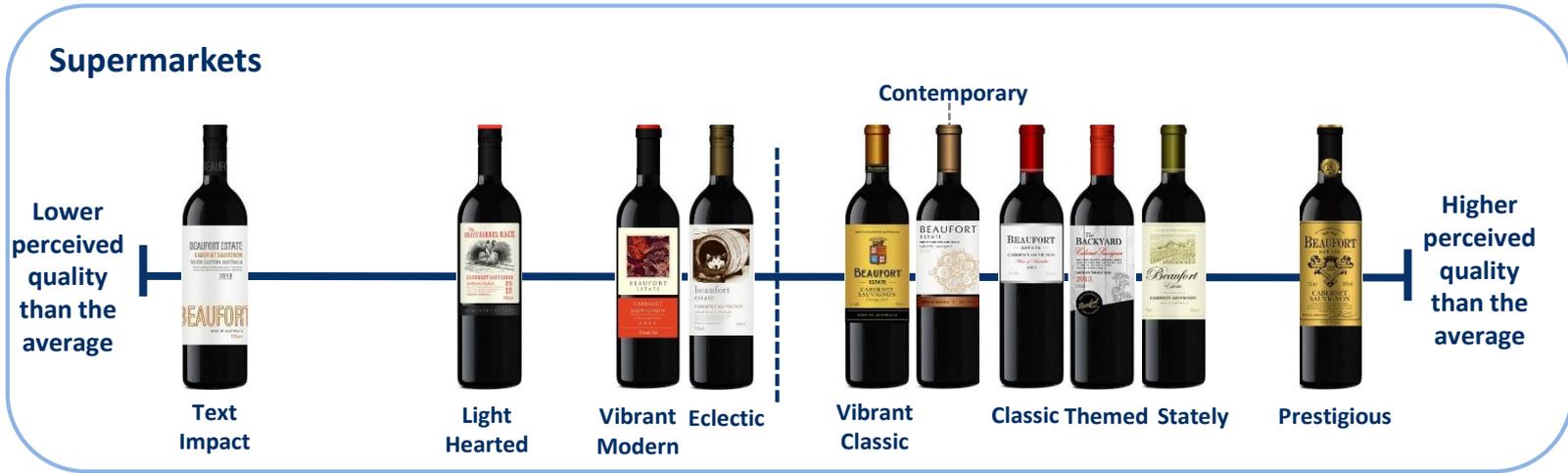
Outlined labels have same position from the average



\*Note: Dotted line represents the average point of each continuum



# Perceived quality of labels by channels: Similar positioning although the Stately design does not appeal to convenience store shoppers

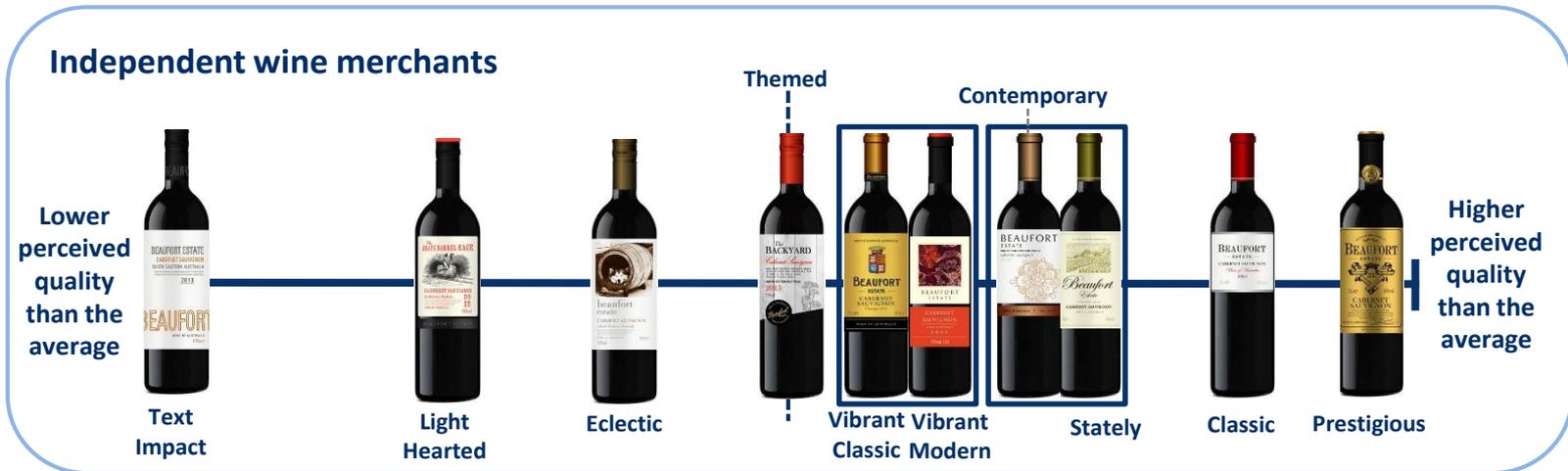
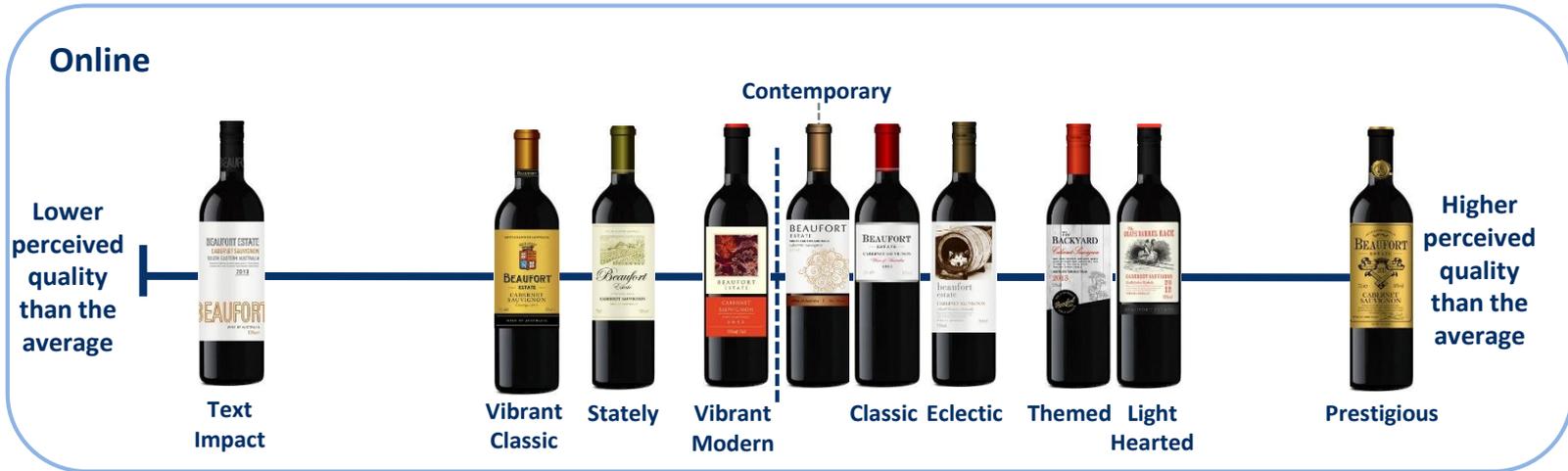


Outlined labels have same position from the average



\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Perceived quality of labels by channels: Aside from Prestigious, the more traditional designs have less appeal with online shoppers



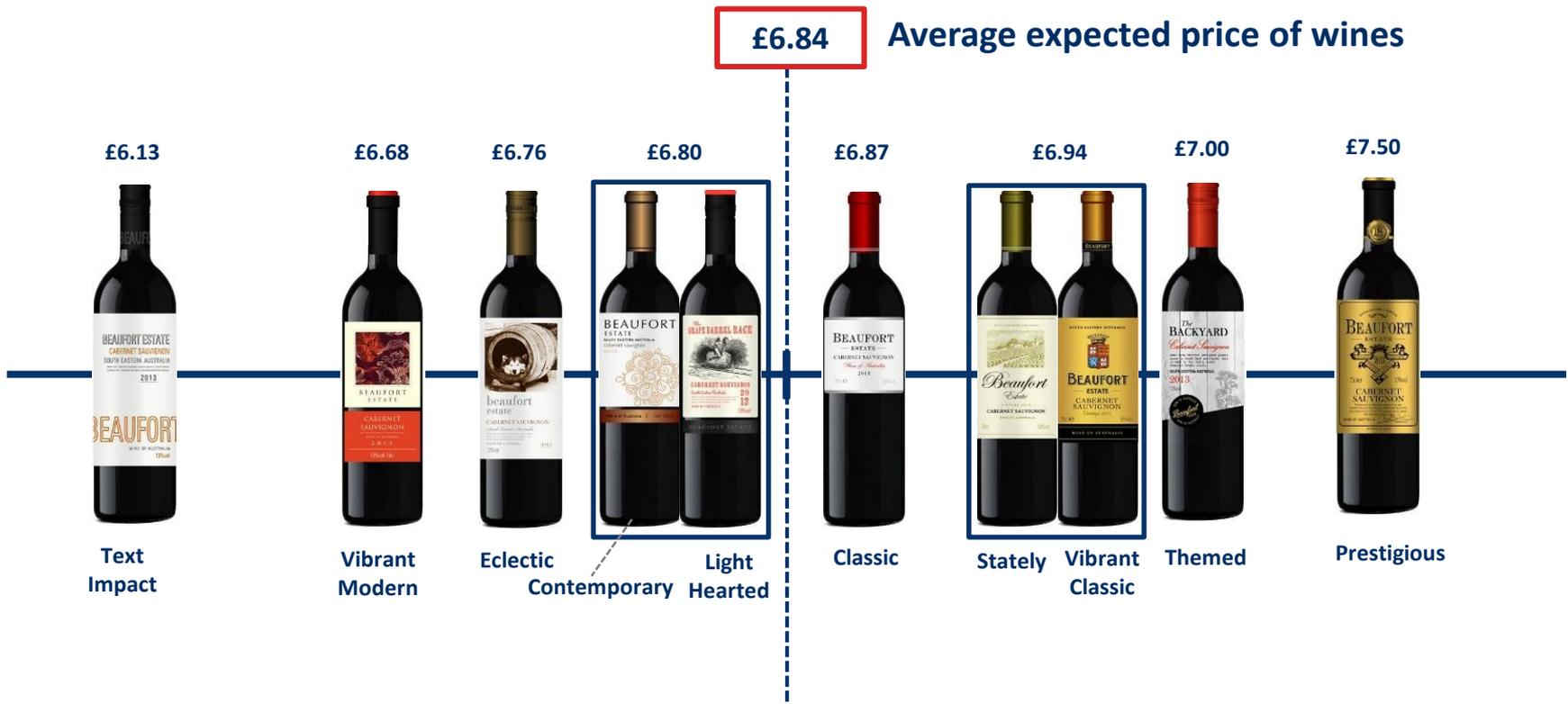
\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

- How different label categories perform
  - Profiling by gender, age and channels across:
    - Attractiveness
    - Perceived quality
    - Expected price
    - Likelihood to buy

# Overall expected average price perceptions of labels: Traditional label designs create higher price expectations with the exception of Themed



Expected price of wines for all UK regular wine drinkers

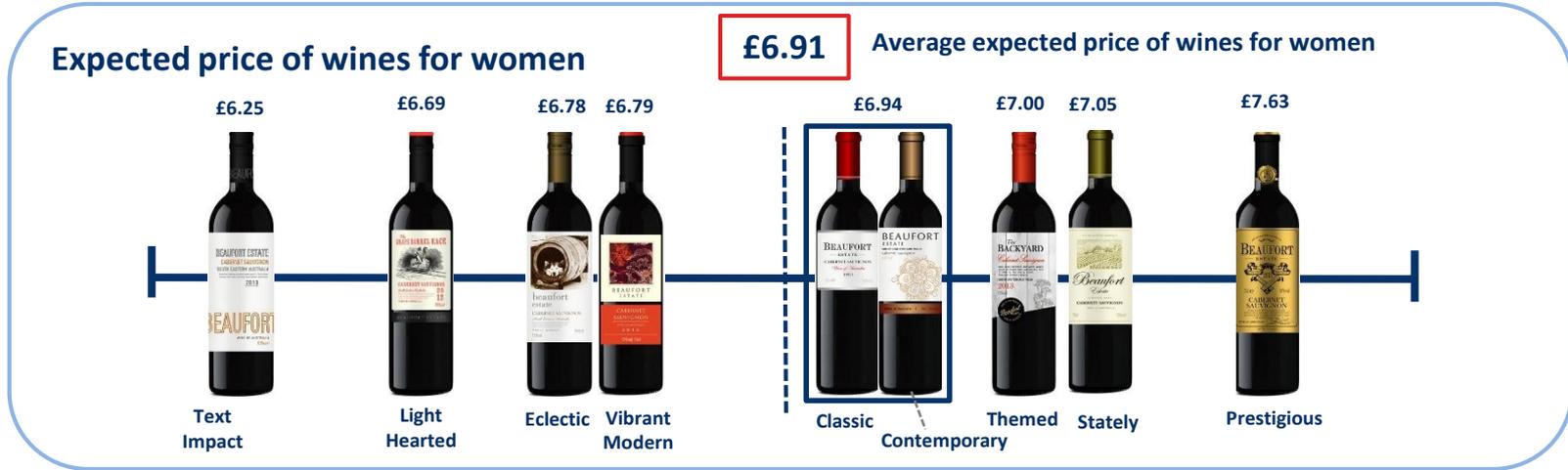
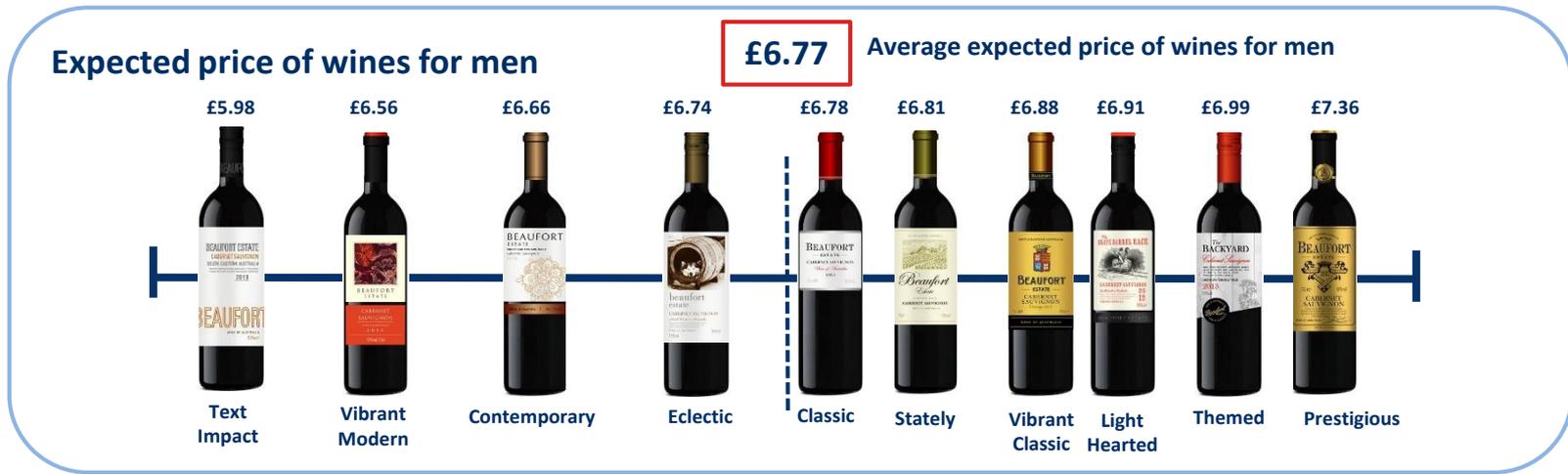


Outlined labels have same position from the average

\*Note: Dotted line represents the average point of each continuum  
Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Expected average price perceptions of labels by gender:

Women are likely to have a slightly higher price expectation and a clearer lead position of the Prestigious design

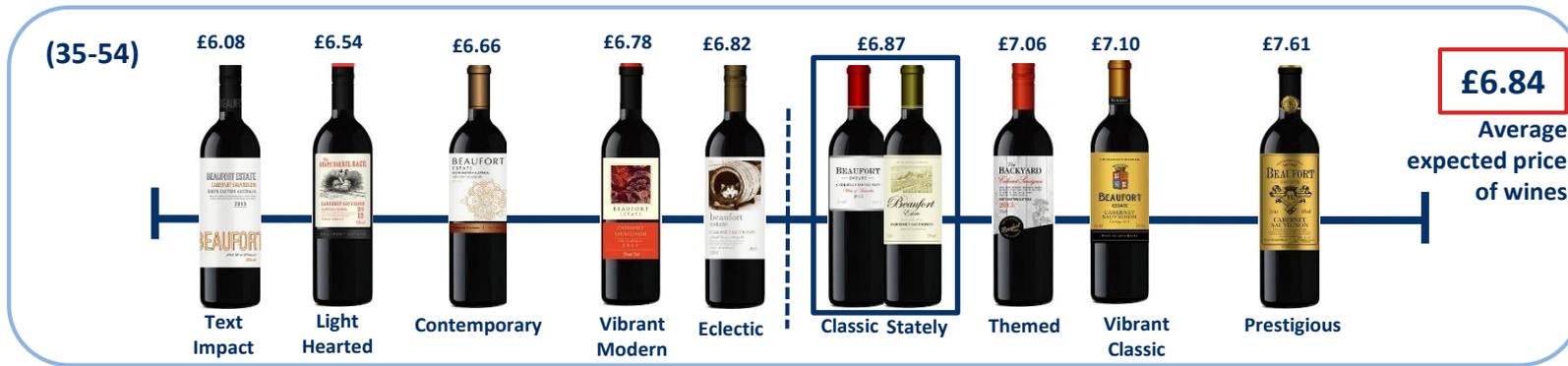
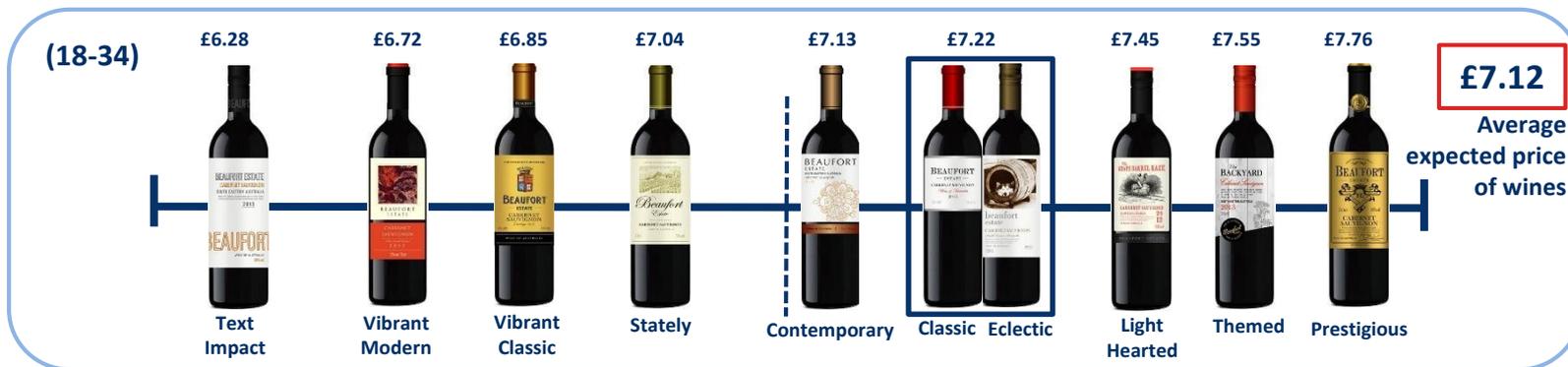


Outlined labels have same position from the average



\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Expected average price perceptions of labels by age: Younger wine drinkers tend to have slightly higher price expectations and more acceptance of modern label designs



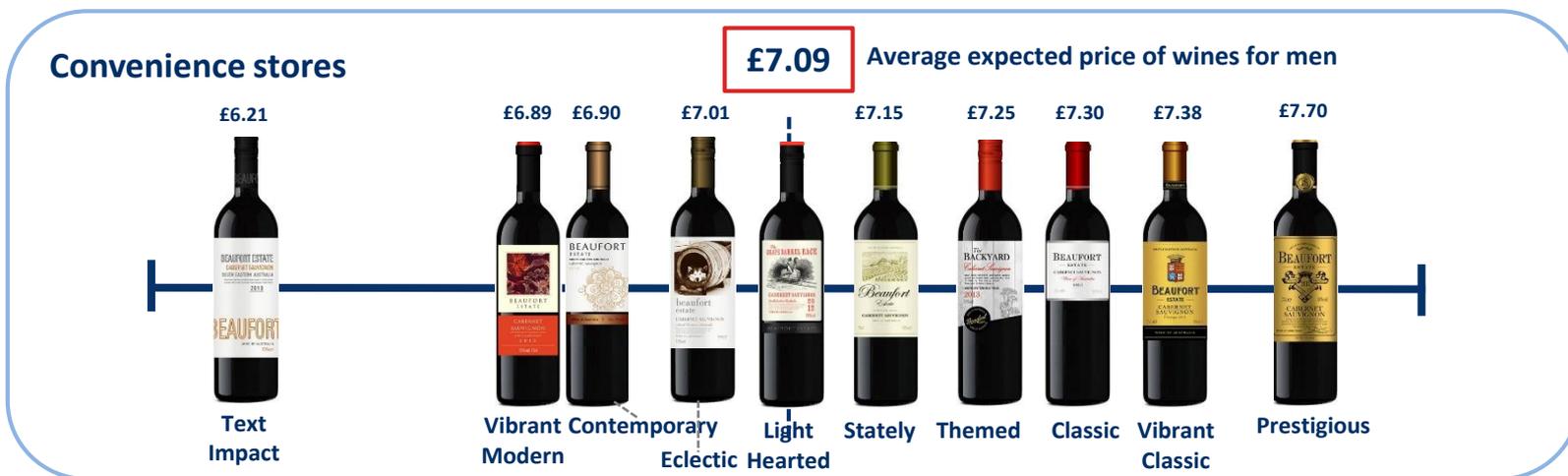
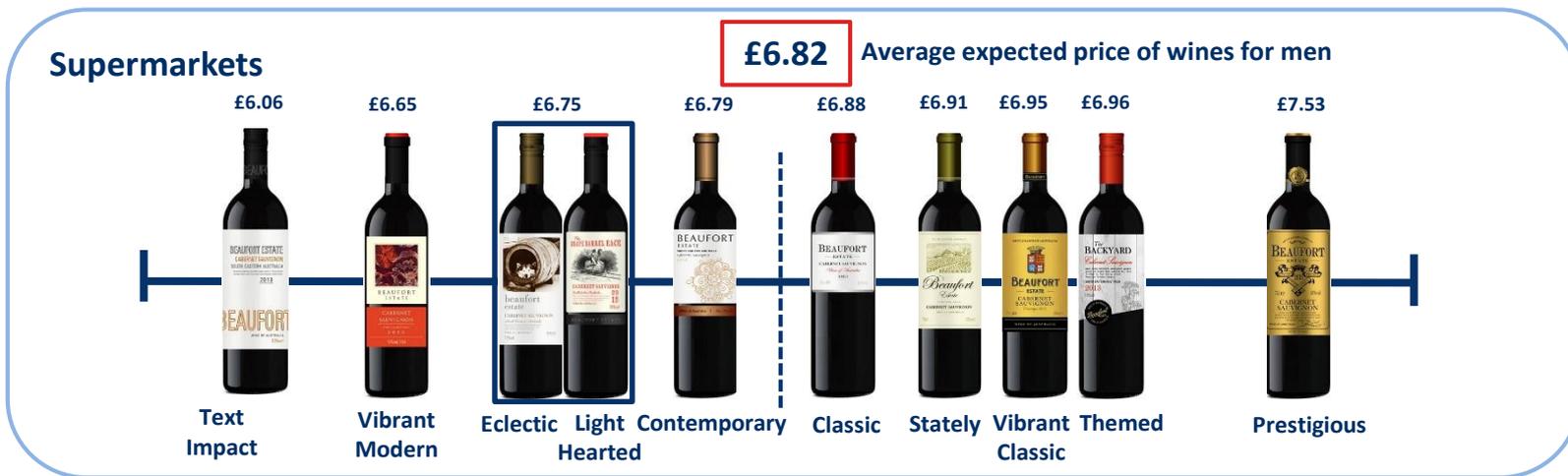
Outlined labels have same position from the average

\*Note: Dotted line represents the average point of each continuum



# Expected average price perception of labels by channels:

Supermarkets have the lowest price expectations of all channels, possible reflecting their price driven sales promotions



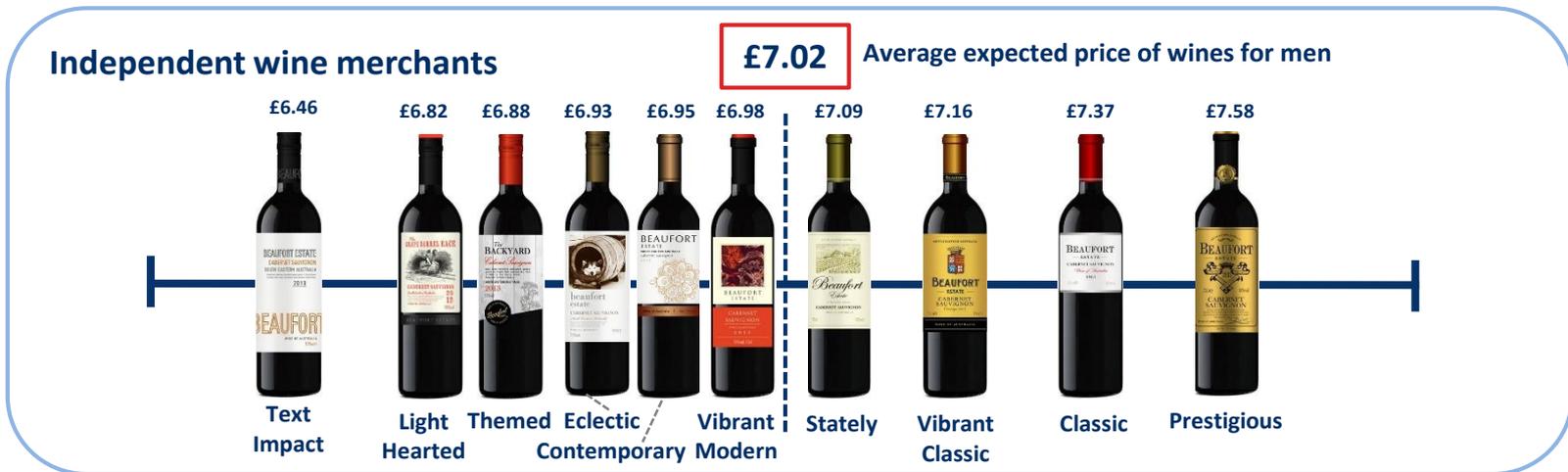
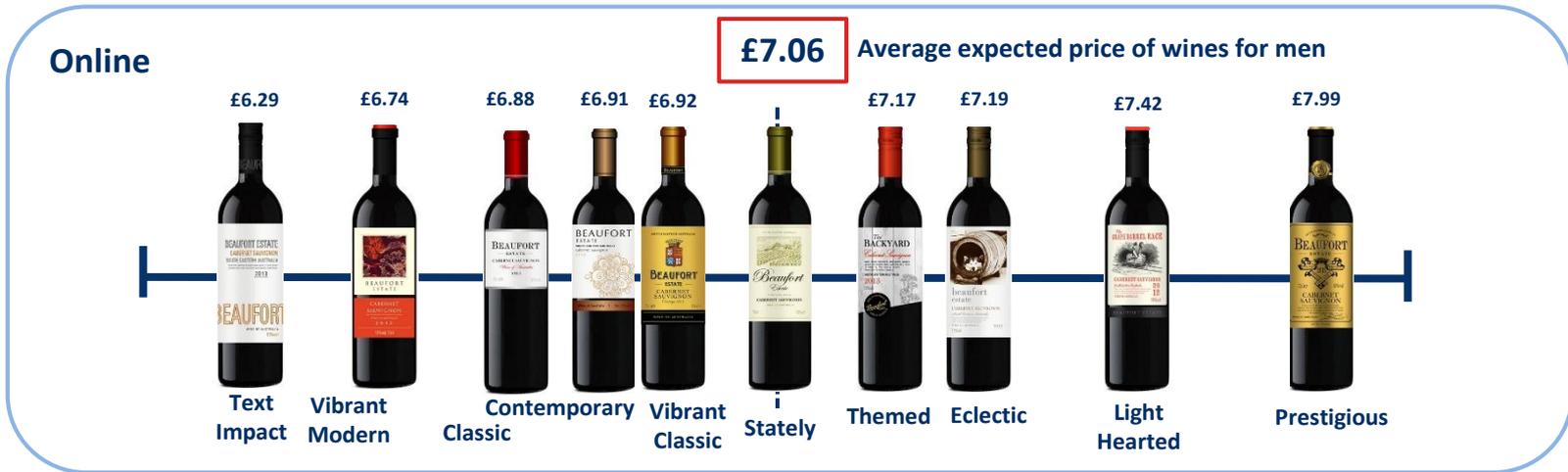
Outlined labels have same position from the average



\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Expected average price perceptions of labels by channels:

Wine merchant consumers expect higher prices from traditional labels, unlike online consumers



\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

- How different label categories perform
  - Profiling by gender, age and channels across:
    - Attractiveness
    - Perceived quality
    - Expected price
    - Likelihood to buy

# Overall likelihood to buy: Prestigious label clearly positioned as a Formal occasion wine; Contemporary and Themed work well across all occasions



All occasions



Informal occasions



Formal occasions

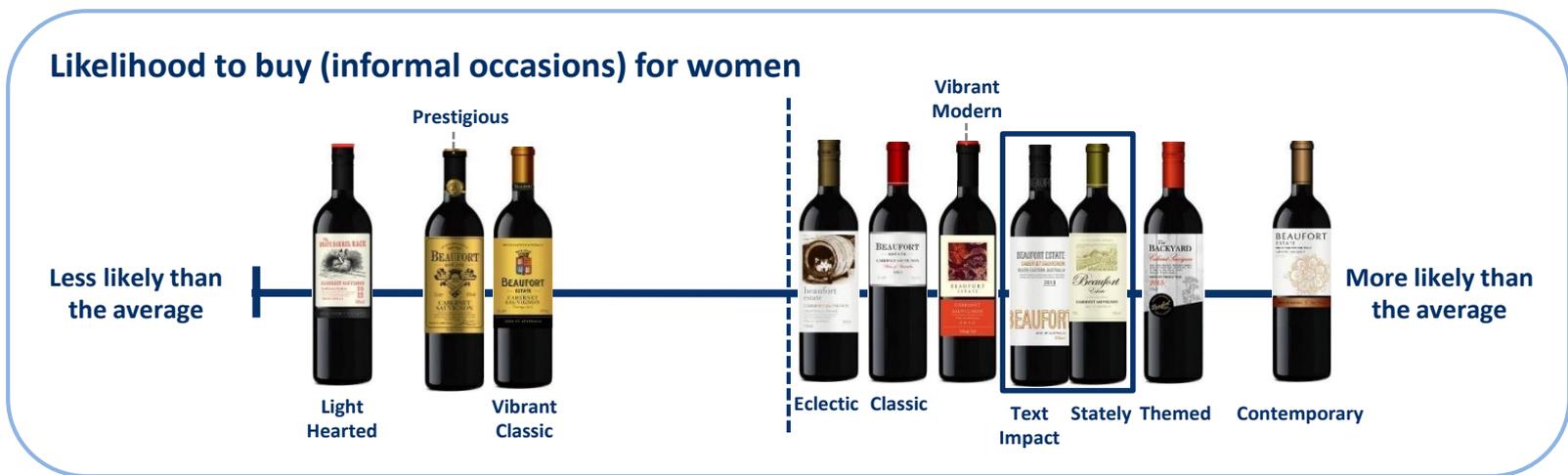


Outlined labels have same position from the average

\*Note: Dotted line represents the average point of each continuum



# Likelihood to buy - Informal occasions by gender: Women seem to clearly identify with Text Impact for informal occasions whereas men continue to reject it



Outlined labels have same position from the average

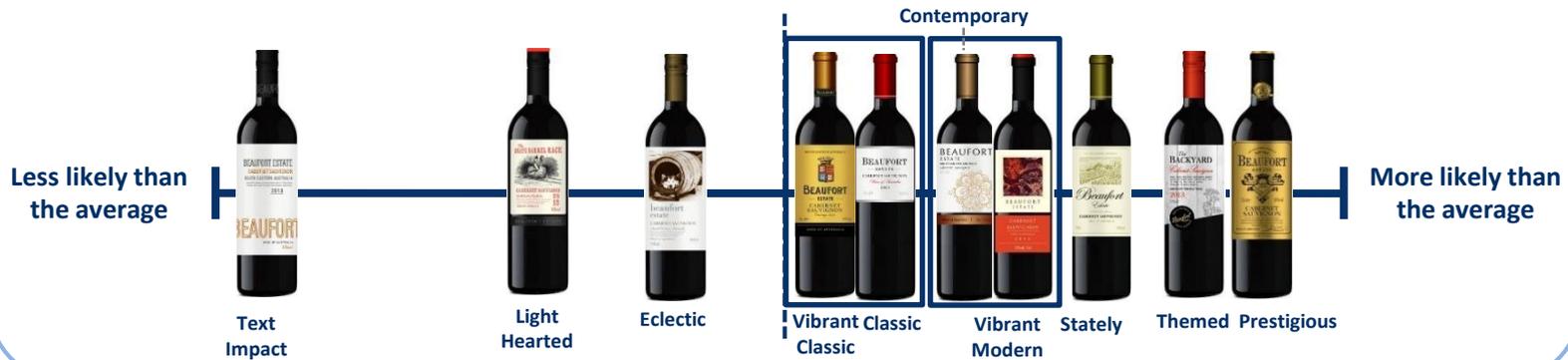


\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Likelihood to buy - Formal occasions by gender: The Prestigious design becomes prominent for formal occasions although women still connect more with Contemporary

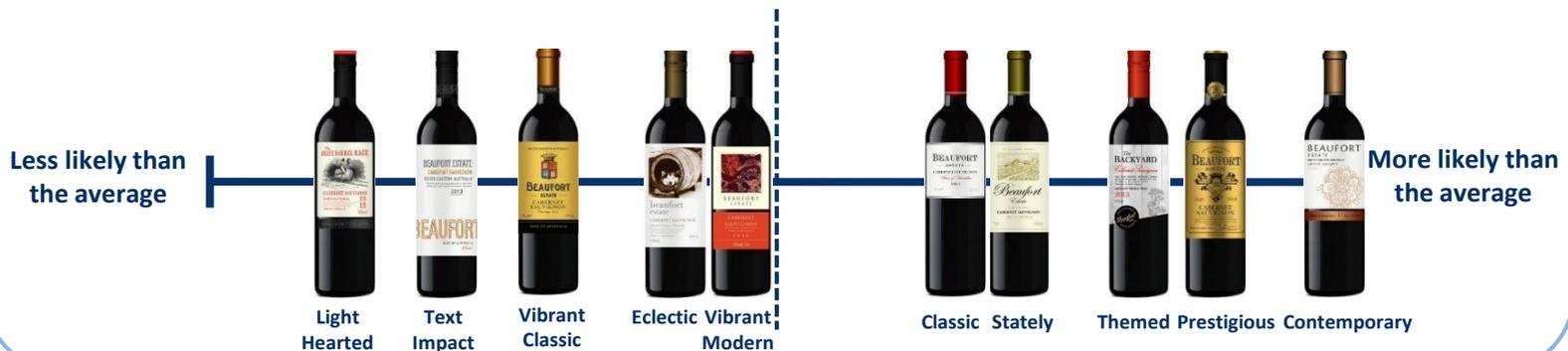


## Likelihood to buy (formal occasions) for men



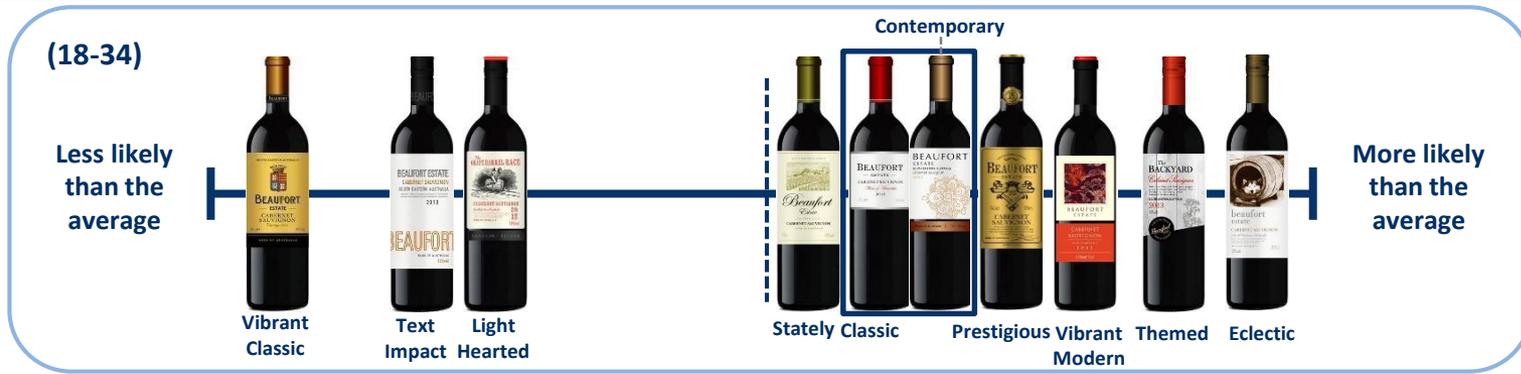
Outlined labels have same position from the average

## Likelihood to buy (formal occasions) for women



\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Likelihood to buy - Informal occasions by age: Contemporary is the preferred design with the older age categories, the likelihood of Eclectic decreases with age

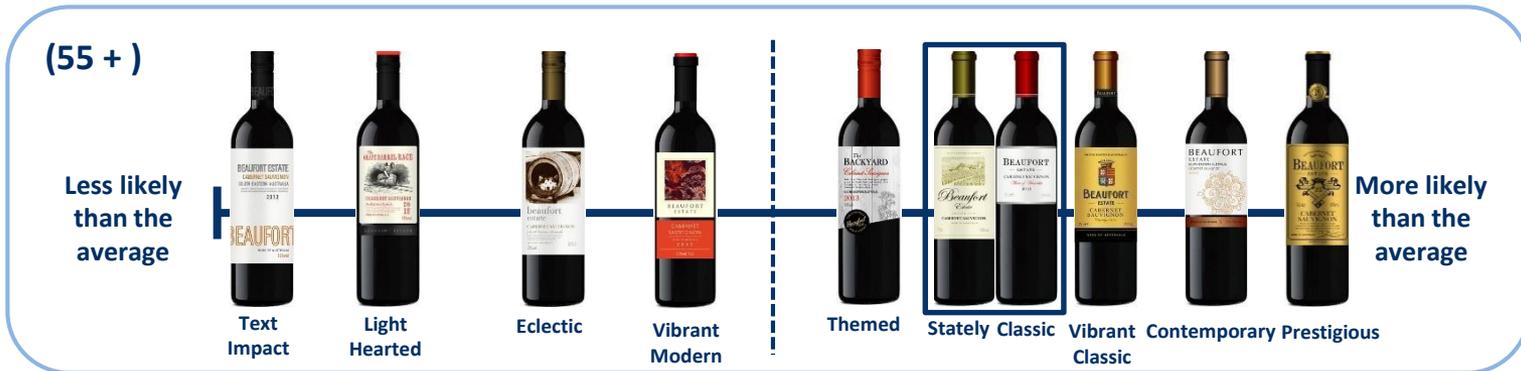


□  
Outlined labels have same position from the average

\*Note:  
Dotted line represents the average point of each continuum



# Likelihood to buy - Formal occasions by age: Vibrant Classic increases from last position top a top 3 choice as age increases



Outlined labels have same position from the average

\*Note: Dotted line represents the average point of each continuum



# Likelihood to buy - Informal occasions by channels:

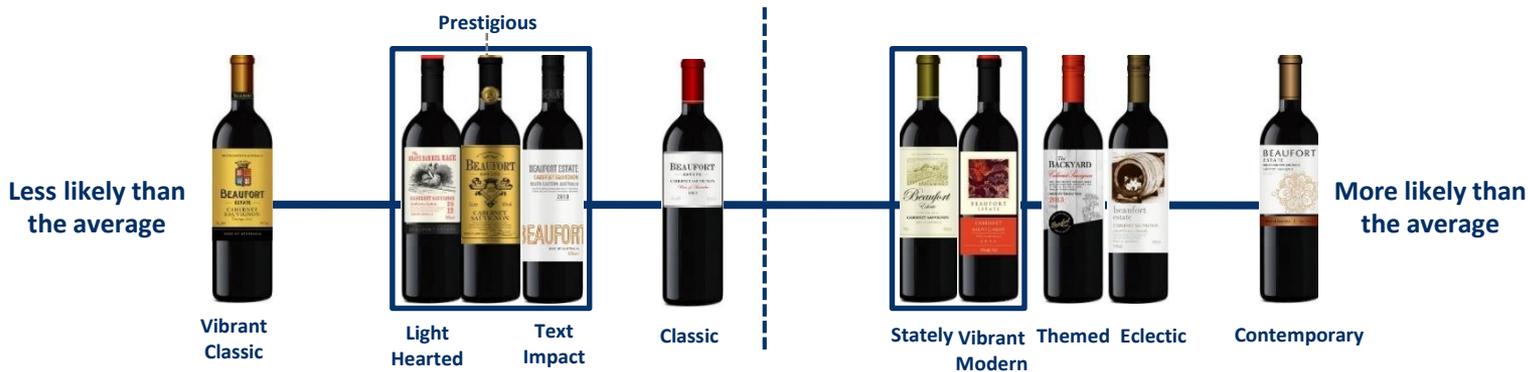
Contemporary is the most likely choice in both channels whereas some traditional designs (Prestigious / Vibrant Classic) do not appeal



## Supermarkets



## Convenience stores



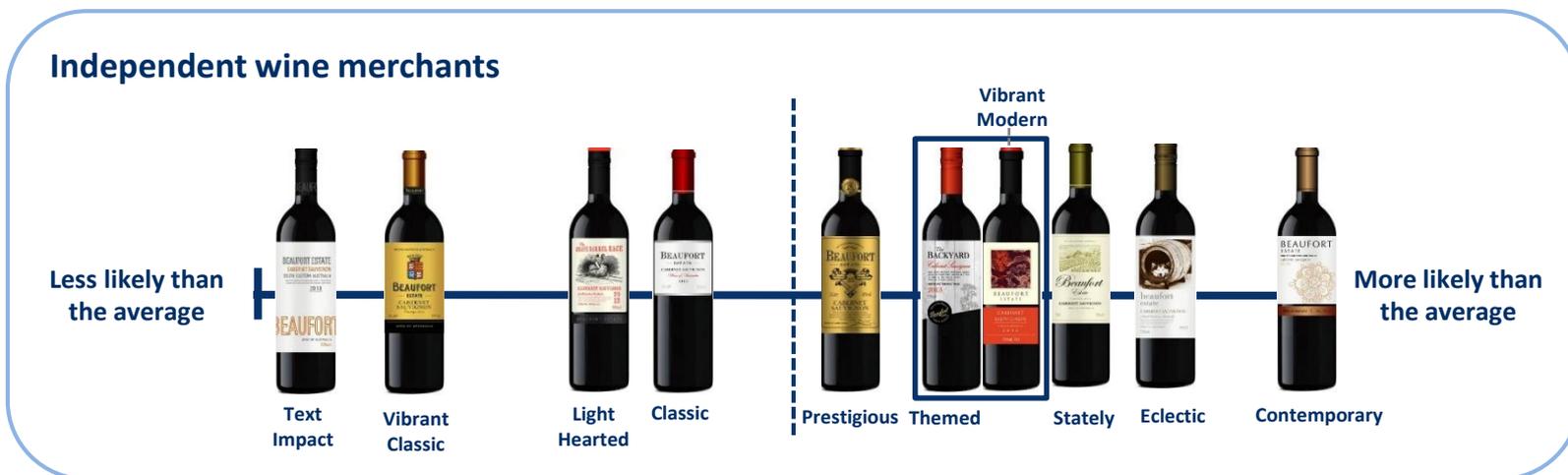
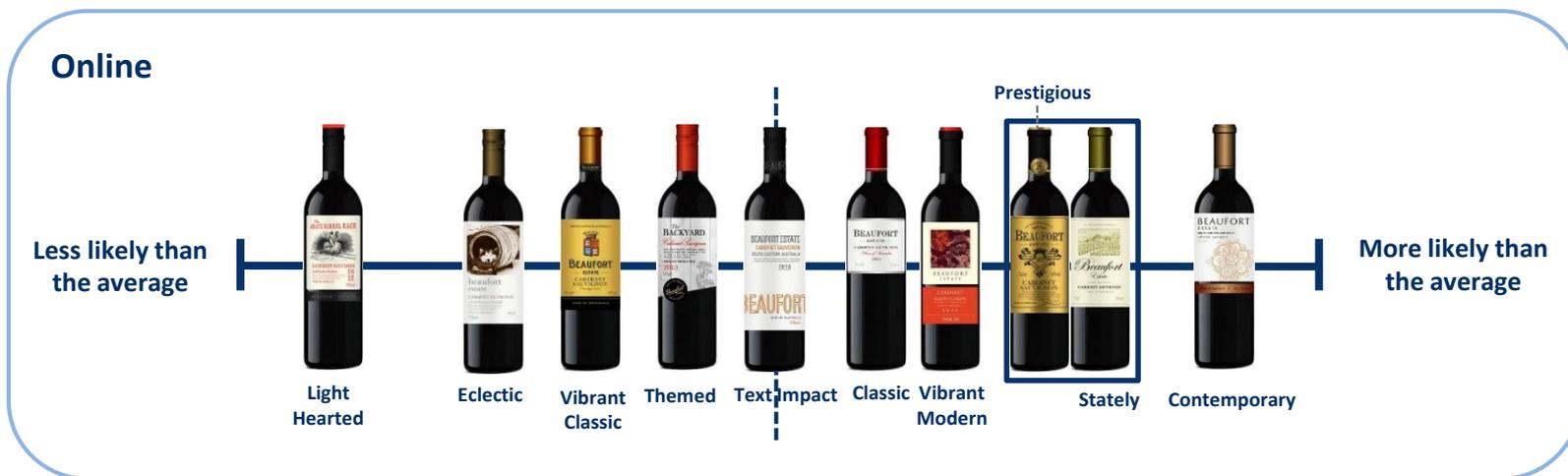
Outlined labels have same position from the average



\*Note: Dotted line represents the average point of each continuum  
Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Likelihood to buy - Informal occasions by channels:

Contemporary again the most likely choice in both channels – Text Impact has more appeal to online consumers

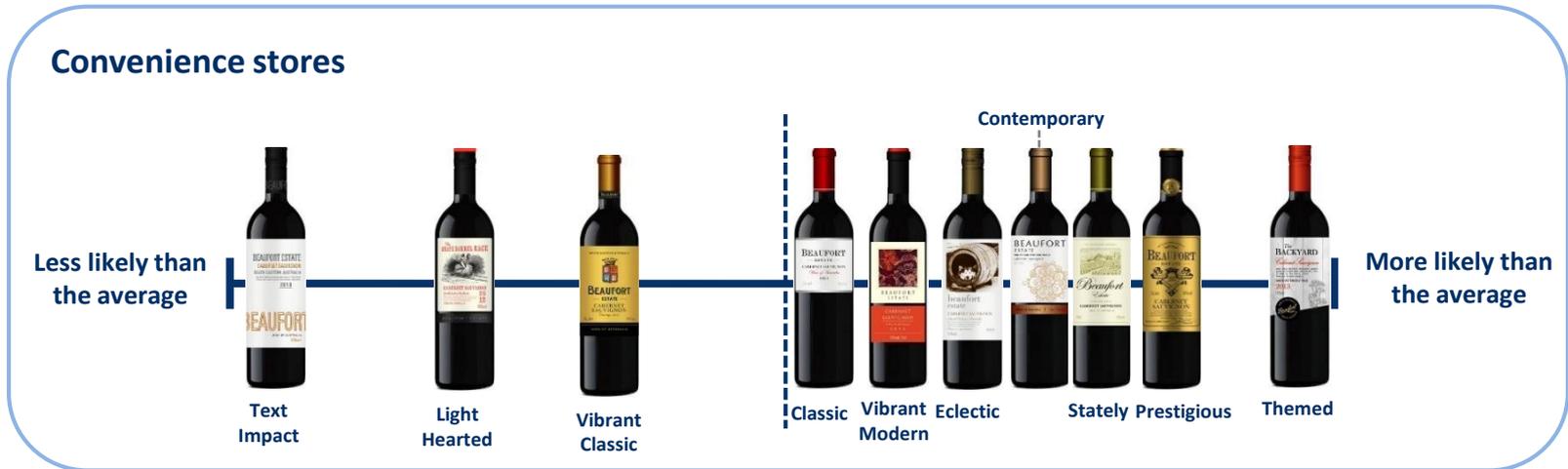
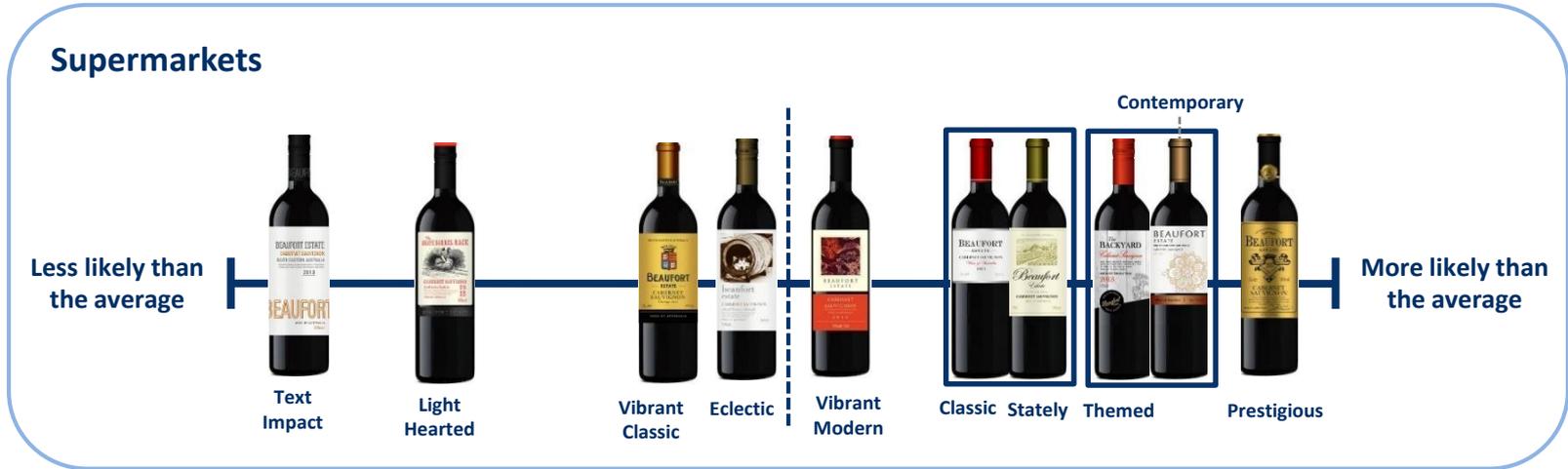


Outlined labels have same position from the average



\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Likelihood to buy - Formal occasions by channels: For formal occasions the Prestigious design starts to dominate; Contemporary still performs well

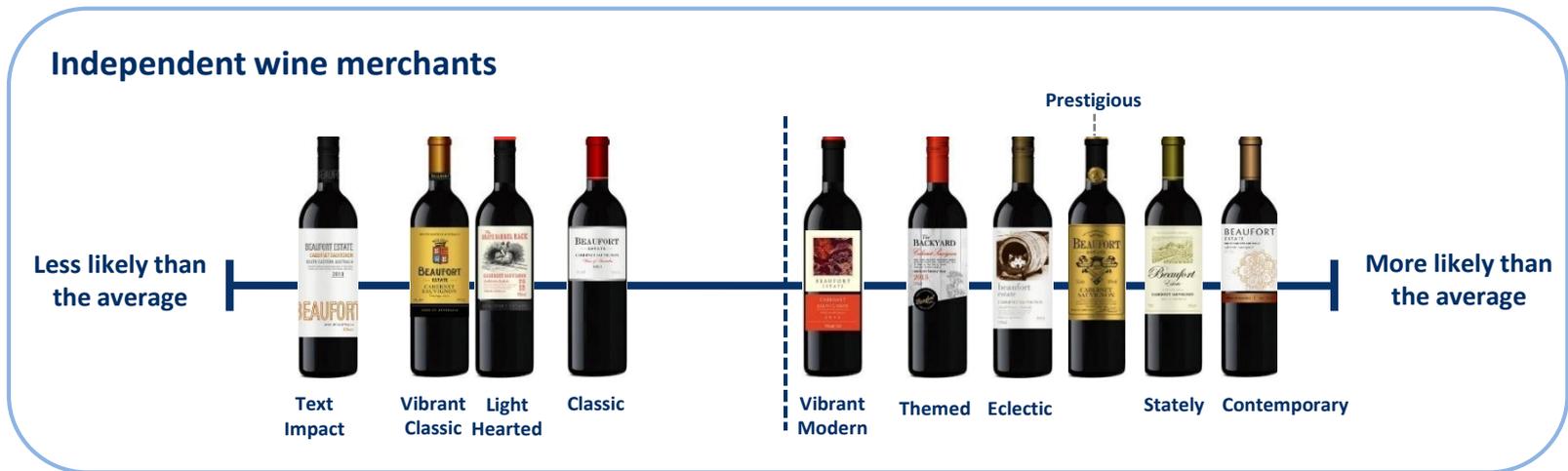
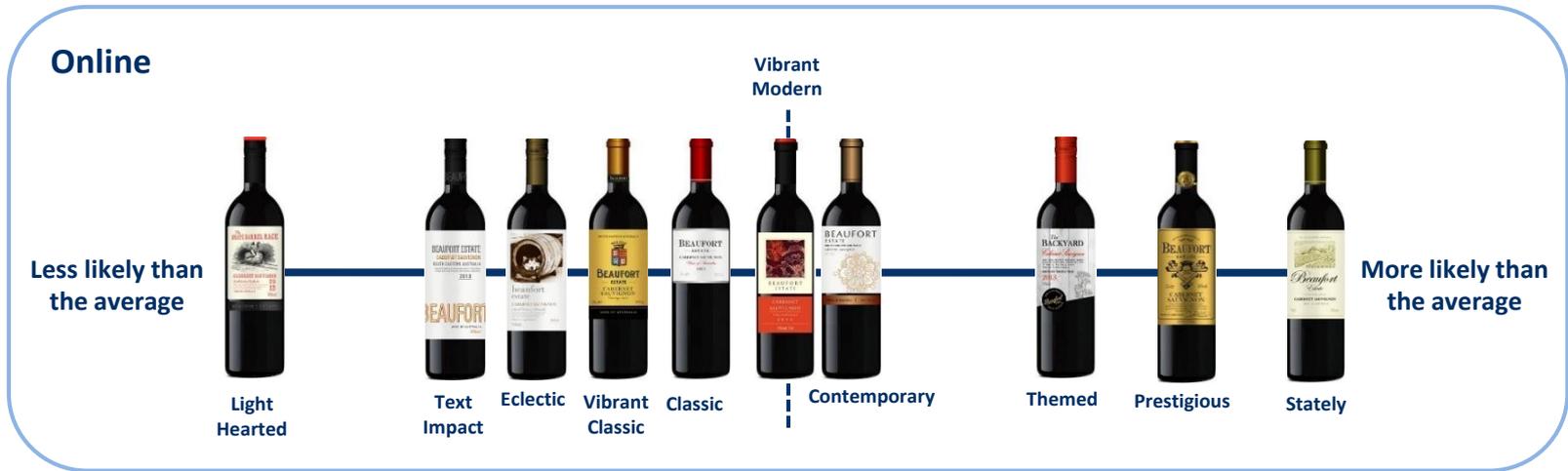


 Outlined labels have same position from the average



\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Likelihood to buy - Formal occasions by channels: Stately overtakes Prestigious as a more likely choice in both channels



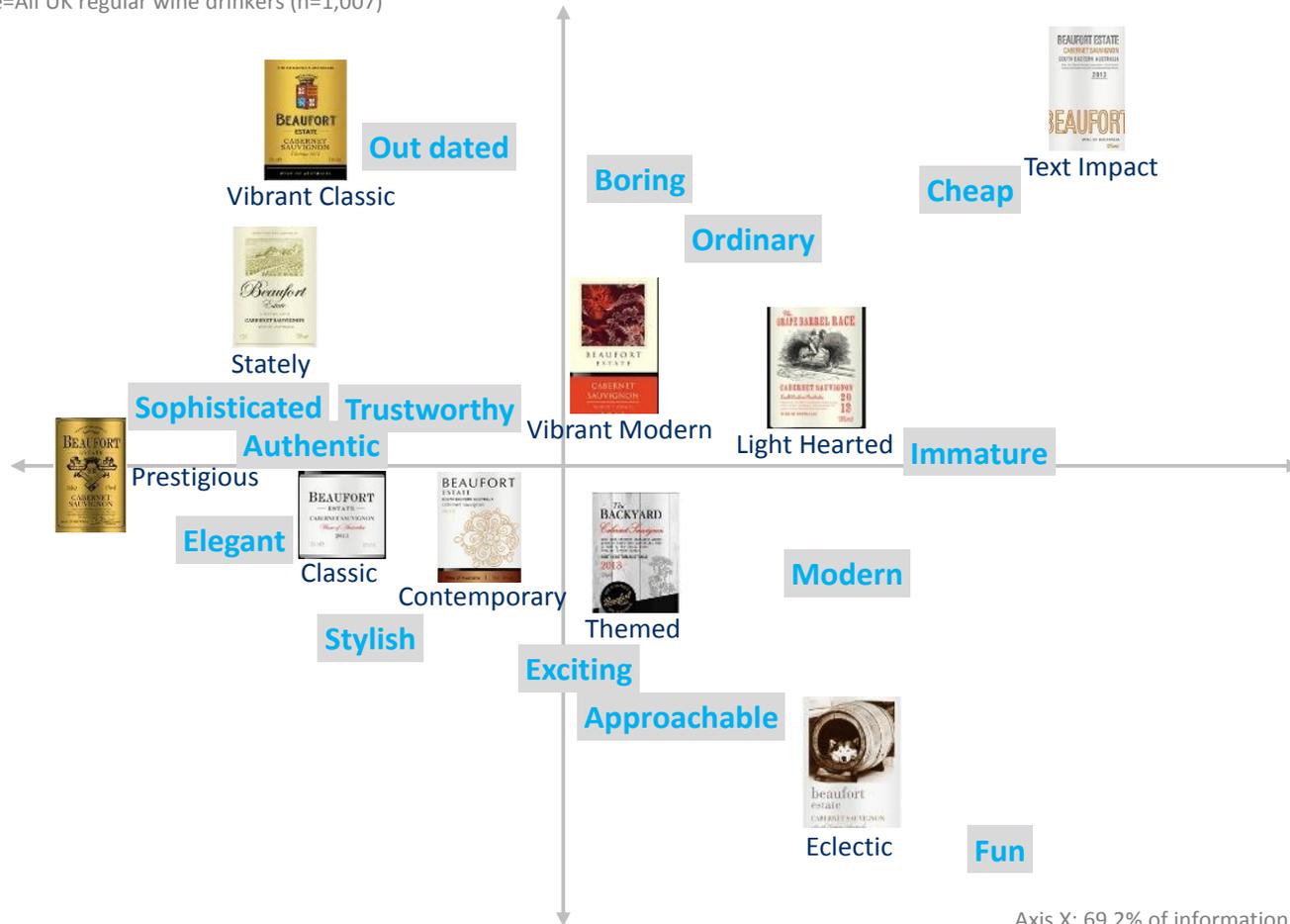
\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

- Imagery Statements for Label Categories

# Imagery statements for label categories: Traditional labels and the Contemporary design draw the most positive associations; Text Impact and Vibrant Classic have most negative positions

## Imagery statements for label categories - based on correspondence analysis

Base=All UK regular wine drinkers (n=1,007)



Axis X: 69.2% of information

Axis Y: 13.5% of information



# Full table of results:

## Imagery Statements for 10 UK label categories



### Imagery Statements for 10 UK label categories

% use the following statements to describe the label categories

Base: All UK regular wine drinkers

Imagery Statements	UK Label Categories									
	Prestigious	Themed	Contemporary	Stately	Classic	Vibrant Modern	Vibrant Classic	Eclectic	Light Hearted	Text Impact
Stylish	23%	18%	22%	16%	18%	15%	14%	14%	12%	8%
Elegant	23%	14%	16%	21%	20%	13%	14%	11%	8%	5%
Boring	8%	8%	10%	11%	11%	11%	13%	8%	11%	16%
Modern	10%	20%	20%	9%	13%	16%	9%	22%	15%	28%
Approachable	7%	13%	12%	10%	14%	13%	9%	19%	11%	12%
Sophisticated	26%	14%	16%	17%	17%	12%	16%	8%	9%	6%
Authentic	21%	15%	16%	21%	23%	13%	17%	10%	12%	7%
Trustworthy	15%	12%	12%	16%	17%	14%	15%	11%	12%	7%
Fun	4%	8%	6%	4%	3%	9%	4%	18%	17%	11%
Cheap	6%	7%	8%	6%	6%	9%	9%	12%	14%	23%
Ordinary	9%	16%	13%	13%	18%	18%	16%	14%	18%	27%
Exciting	7%	6%	6%	6%	6%	6%	5%	8%	9%	4%
Out dated	13%	6%	4%	10%	7%	10%	14%	5%	12%	6%
Immature	4%	5%	4%	3%	3%	4%	3%	8%	9%	11%

Red Statistically significantly higher than five or more other groups at a 95% confidence level

Blue Statistically significantly higher than four other groups at a 95% confidence level

Source: Wine Intelligence, Vinitrac® UK, May'14, n=1,007 UK regular wine drinkers

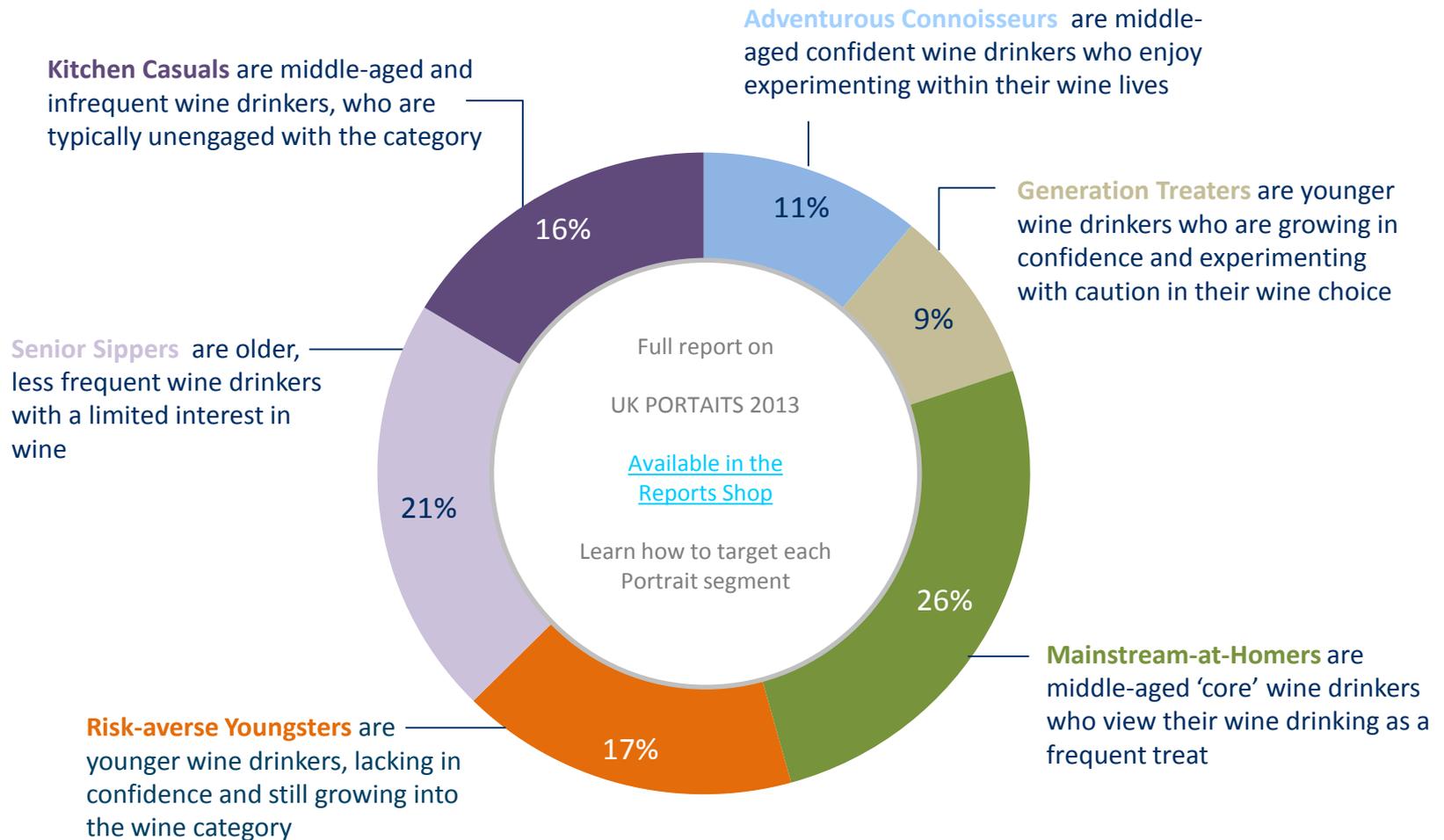


NOTE\* Variance analysis of imagery statements for the label categories is included in the appendix

- Profiling by Portraits:
  - Portraits overview
  - Adventurous Connoisseurs
  - Generation Treeters
  - Mainstream-at-Homers
  - Risk-averse Youngsters
  - Senior Sippers
  - Kitchen Casuals

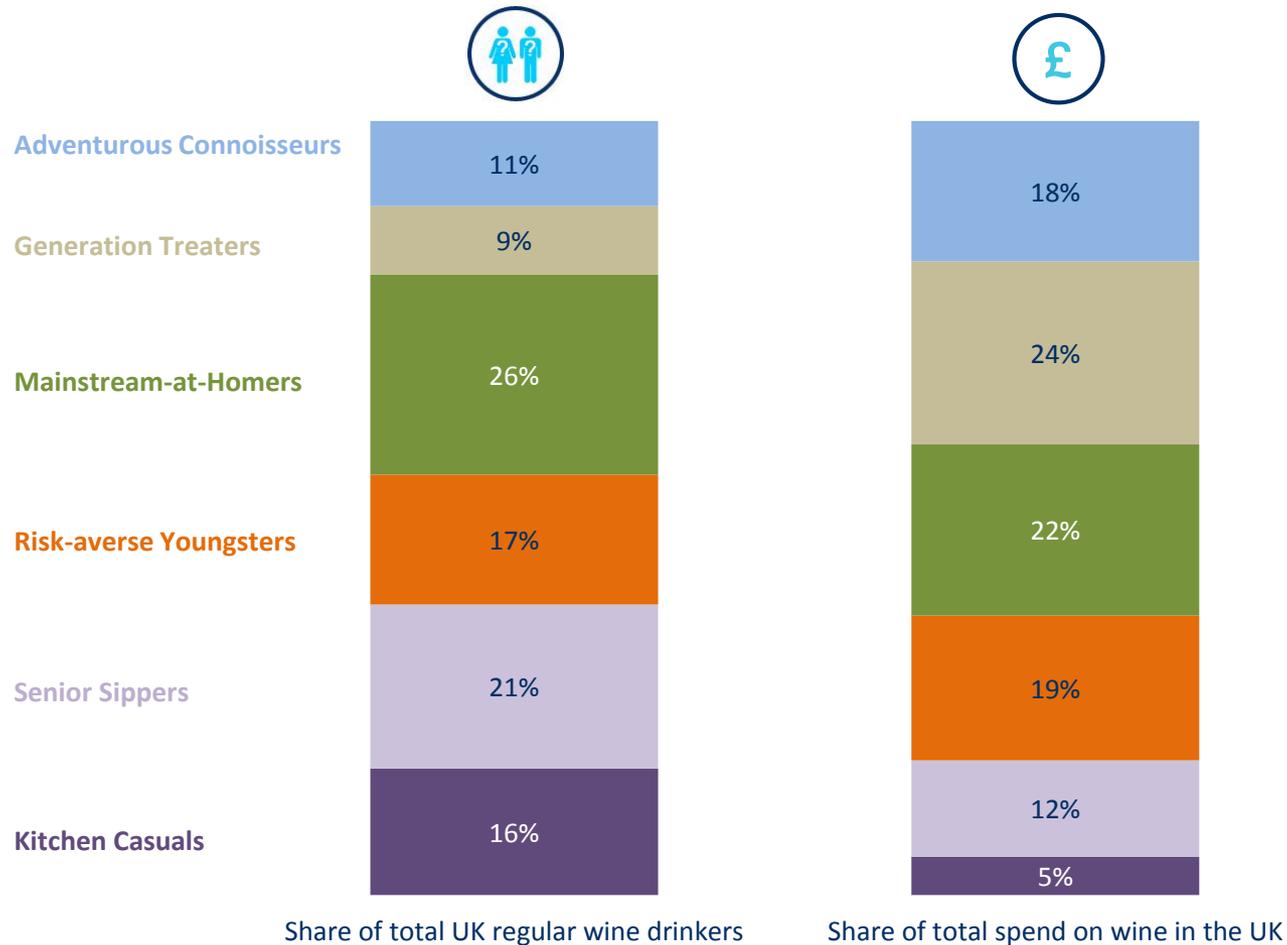
# Meet the segments

UK wine drinkers can be grouped into 6 distinct segments based on their relationship with wine



# Identifying your target:

## Estimating market size



- Profiling by Portraits:
  - Portraits overview
  - Adventurous Connoisseurs
  - Generation Treeters
  - Mainstream-at-Homers
  - Risk-averse Youngsters
  - Senior Sippers
  - Kitchen Casuals

# Adventurous Connoisseurs & label preference

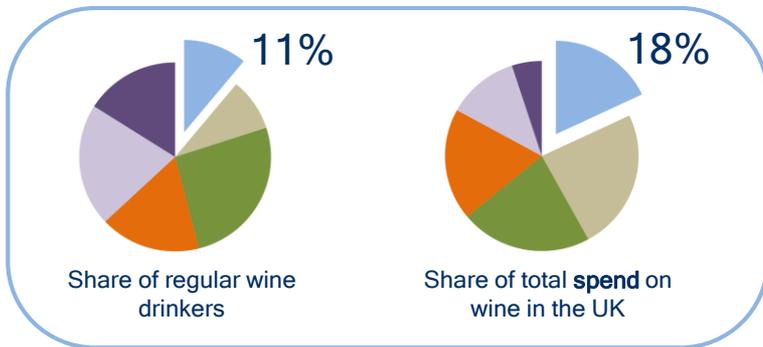
## Who are they:

Middle-aged and higher income confident and experienced wine drinkers

## What do they want from labels

Preference for luxurious designs like the prestigious label but also open to contemporary and themed labels

## Top label categories



Classic    Contemporary    Prestigious    Themed

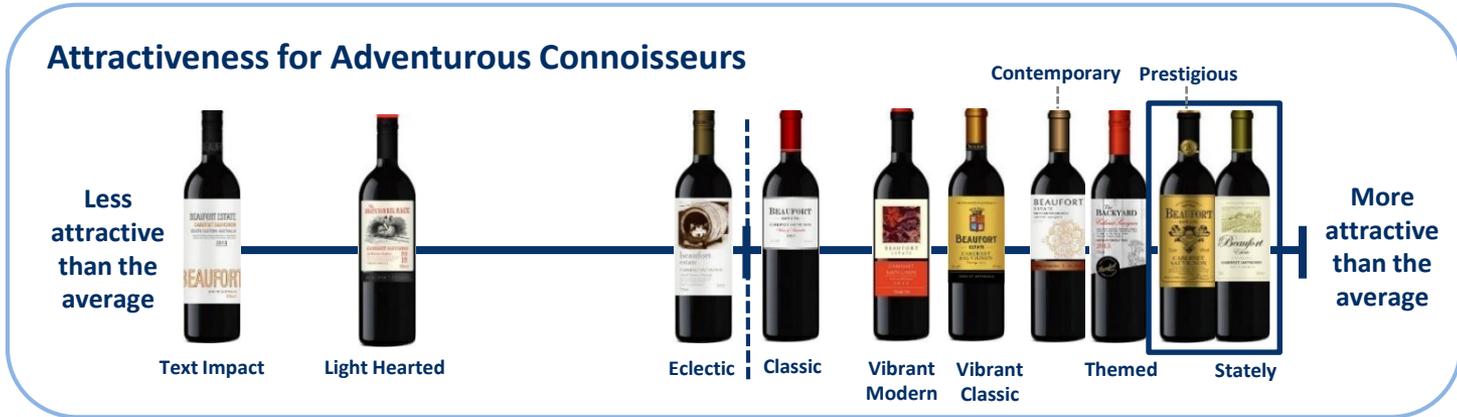
NOTE\* Percentages based on UK Portraits report 2013

Source: Wine Intelligence Vinitrac® UK, March and August 2013, n=2,049 UK regular wine drinkers

Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Adventurous Connoisseurs & label attractiveness:

Adventurous Connoisseurs have a very similar positioning to the average UK regular wine consumer



\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Adventurous Connoisseurs & purchase intent: Prestigious is by far a more likely choice for formal occasions whereas Vibrant Modern has opposite position



Outlined labels have same position from the average



\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

- Profiling by Portraits:
  - Portraits overview
  - Adventurous Connoisseurs
  - Generation Treater
  - Mainstream-at-Homers
  - Risk-averse Youngsters
  - Senior Sippers
  - Kitchen Casuals

# Generation Treaters & label preference

## Who are they:

Younger, conservative wine drinkers who experiment with caution and use price as a proxy for quality

## What do they want from labels

Seek more authentic, traditional and classic designs

## Top label categories



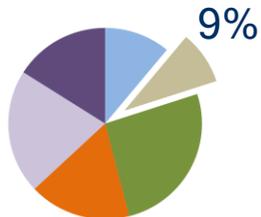
Stately



Classic



Contemporary



Share of regular wine drinkers



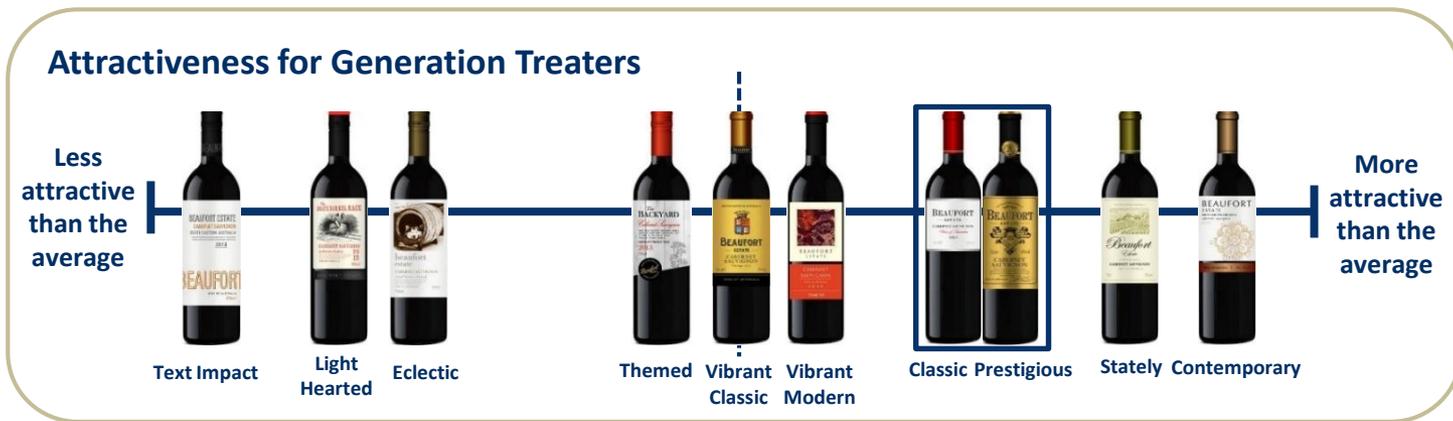
Share of total spend on wine in the UK

NOTE\* Percentages based on UK Portraits report 2013

Source: Wine Intelligence Vinitrac® UK, March and August 2013, n=2,049 UK regular wine drinkers

Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Generation Treaters & label attractiveness: Similar positions to regular UK wine drinkers but with Contemporary overtaking Prestigious



Outlined labels have same position from the average



\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Generation Treaters & purchase intent: Classic is the design of choice for both types of occasions; conversely to regular UK wine drinkers the Prestigious design appeals more for informal occasions



## Likelihood to buy (informal occasion) for Generation Treaters



Outlined labels have same position from the average

## Likelihood to buy (formal occasion) for Generation Treaters



\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

- Profiling by Portraits:
  - Portraits overview
  - Adventurous Connoisseurs
  - Generation Treeters
  - Mainstream-at-Homers
  - Risk-averse Youngsters
  - Senior Sippers
  - Kitchen Casuals

# Mainstream-at-Homers & label preference

## Who are they:

Middle-aged 'core' wine drinkers from across the UK

## What do they want from labels

Most open group to Text Impact designs for informal occasions

## Top label categories



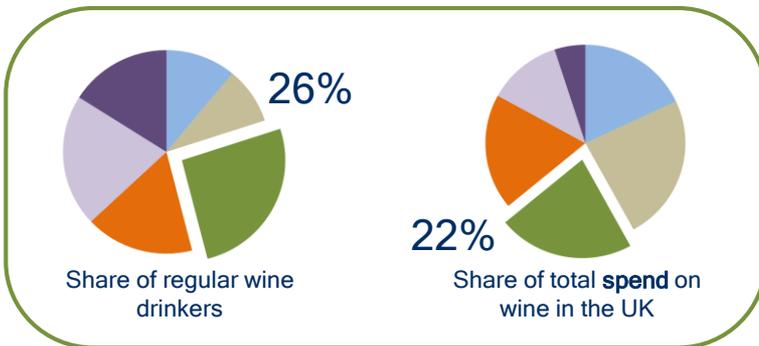
Contemporary



Prestigious



Themed

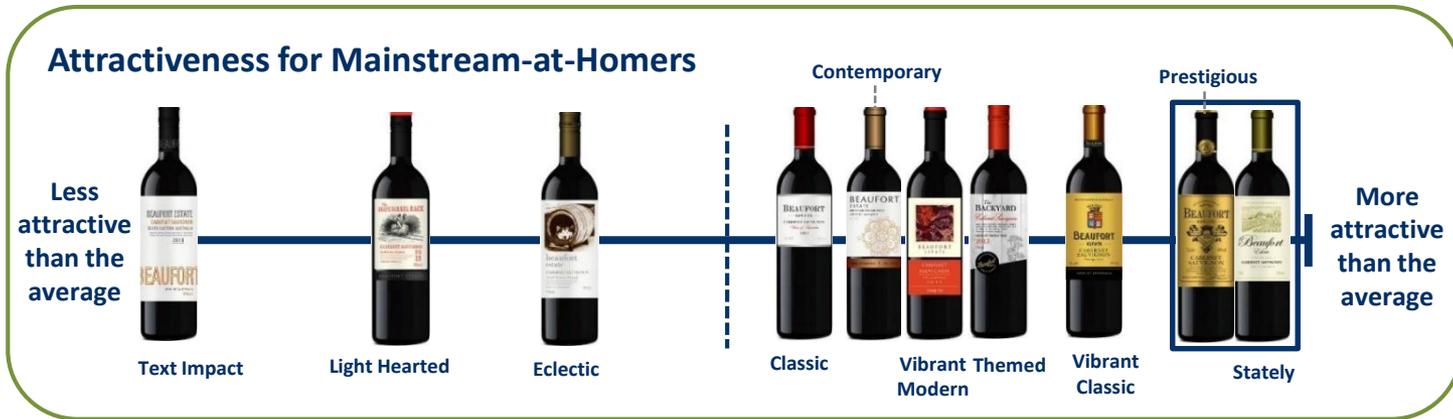


NOTE\* Percentages based on UK Portraits report 2013

Source: Wine Intelligence Vinitrac® UK, March and August 2013, n=2,049 UK regular wine drinkers

Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Mainstream-at-Homers & label attractiveness: Vibrant Classic has a lot more appeal to mainstream-at-Homers than the average



Outlined labels have same position from the average



\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Mainstream-at-Homers & purchase intent: Text Impact connects strongly with this segment for informal occasions

## Likelihood to buy (informal occasion) for Mainstream-at-Homers



## Likelihood to buy (formal occasion) for Mainstream-at-Homers



\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

- Profiling by Portraits:
  - Portraits overview
  - Adventurous Connoisseurs
  - Generation Treeters
  - Mainstream-at-Homers
  - Risk-averse Youngsters
  - Senior Sippers
  - Kitchen Casuals

# Risk-averse Youngsters & label preference

## Who are they:

Younger wine drinkers, lacking in confidence and with low interest in the wine category

## What do they want from labels

As younger consumers, they seek more modern or themed labels

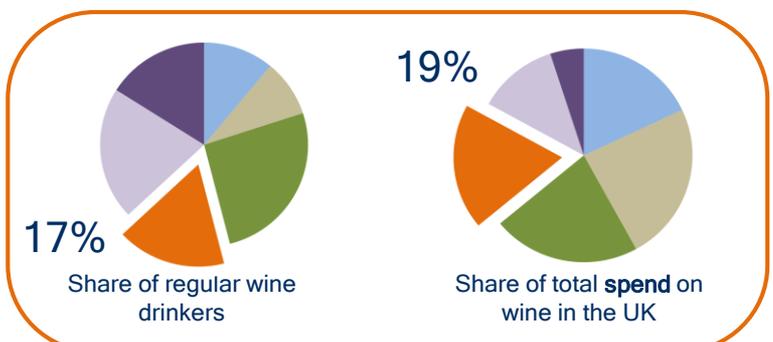
## Top label categories



Contemporary

Eclectic

Themed



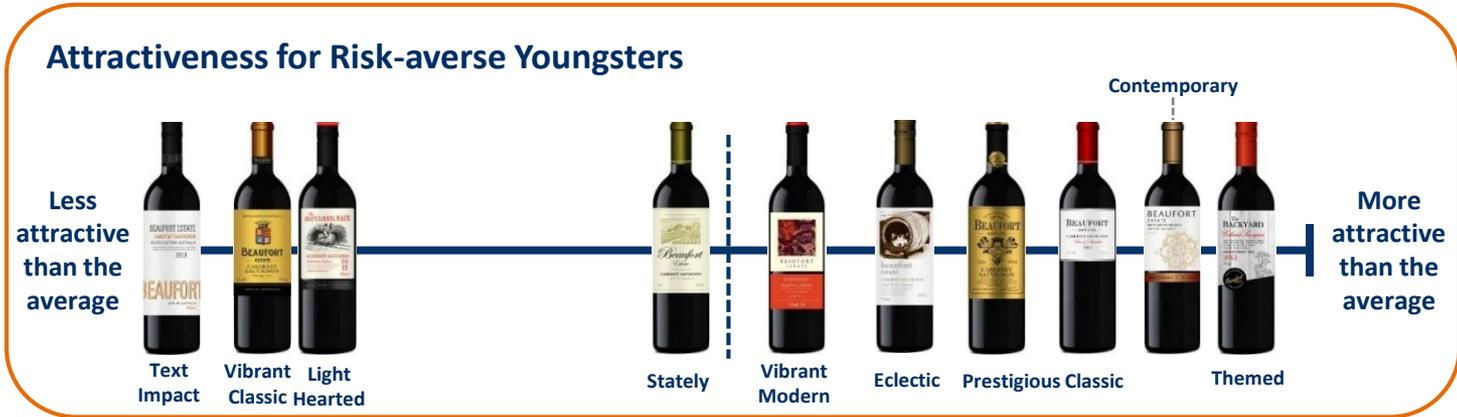
NOTE\* Percentages based on UK Portraits report 2013

Source: Wine Intelligence Vinitrac® UK, March and August 2013, n=2,049 UK regular wine drinkers

Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers



# Risk-averse Youngsters & label attractiveness: More modern designs of Themed and Contemporary are seen as the most attractive



\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Risk-adverse Youngsters & purchase intent: Themed is the most likely to be purchased for all occasions; Prestigious becomes more likely for formal occasions

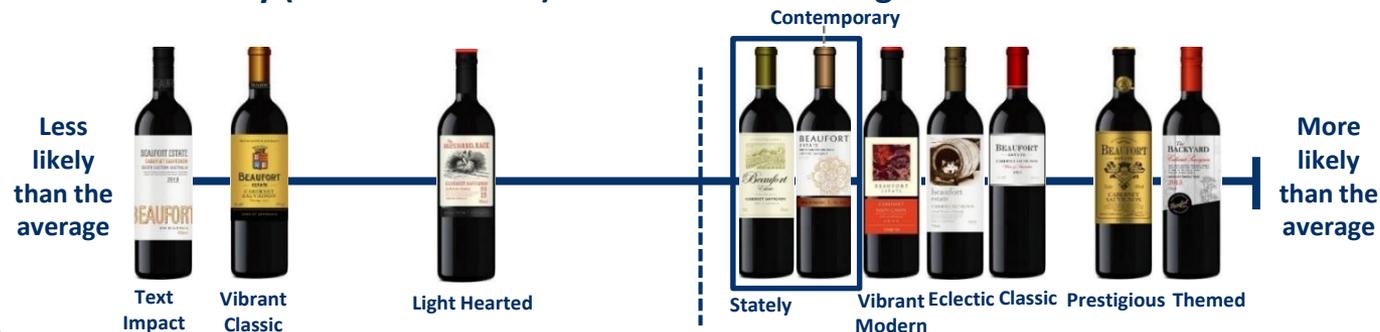


## Likelihood to buy (informal occasion) for Risk-averse Youngsters



Outlined labels have same position from the average

## Likelihood to buy (formal occasion) for Risk-averse Youngsters



\*Note: Dotted line represents the average point of each continuum  
Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

- Profiling by Portraits:
  - Portraits overview
  - Adventurous Connoisseurs
  - Generation Treeters
  - Mainstream-at-Homers
  - Risk-averse Youngsters
  - Senior Sippers
  - Kitchen Casuals

# Senior Sippers & label preference

## Who are they:

Older, less frequent wine drinkers with a limited interest in wine

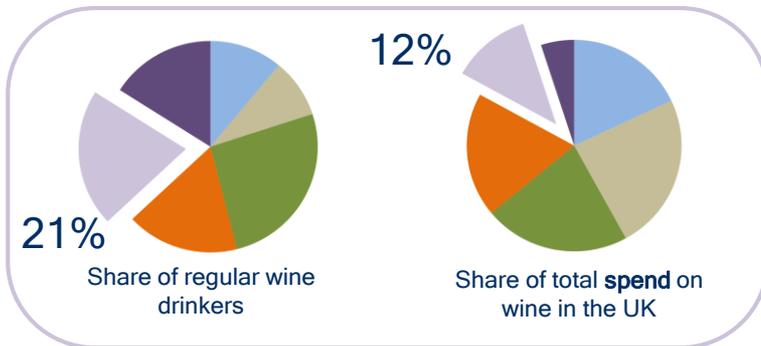
## What do they want from labels

Seek labels that reflect tradition, also have a preference for contemporary and bright coloured designs

## Top label categories



Vibrant Modern   Stately   Contemporary   Prestigious

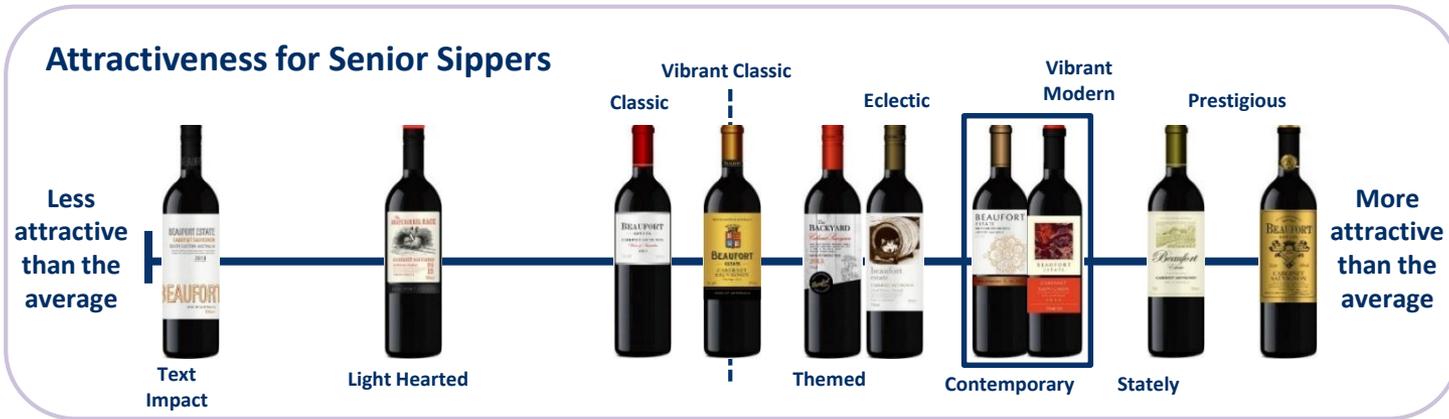


NOTE\* Percentages based on UK Portraits report 2013

Source: Wine Intelligence Vinitrac® UK, March and August 2013, n=2,049 UK regular wine drinkers

Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Senior Sippers & label attractiveness: Preferences broadly in line with the average with the more traditional label designs being seen as more attractive



\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Senior Sippers & purchase intent: Prestigious has the most polarised position between informal and formal occasions of any portrait group

## Likelihood to buy (informal occasion) for Senior Sippers



## Likelihood to buy (formal occasion) for Senior Sippers



\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

- Profiling by Portraits:
  - Portraits overview
  - Adventurous Connoisseurs
  - Generation Treeters
  - Mainstream-at-Homers
  - Risk-averse Youngsters
  - Senior Sippers
  - Kitchen Casuals

# Kitchen Casuals & labels preference

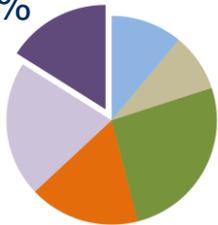
## Who are they:

Middle-aged or older and infrequent wine drinkers, typically unengaged with the category

## What do they want from labels

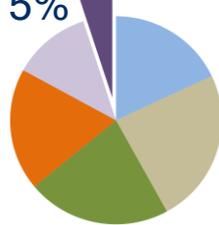
Strong preference for labels with a simple and classic appeal

16%



Share of regular wine drinkers

5%

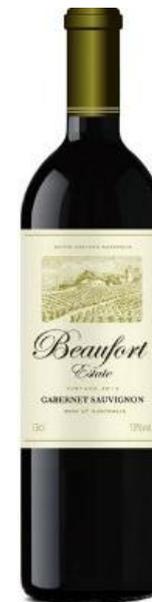


Share of total spend on wine in the UK

## Top label categories



Classic



Eclectic



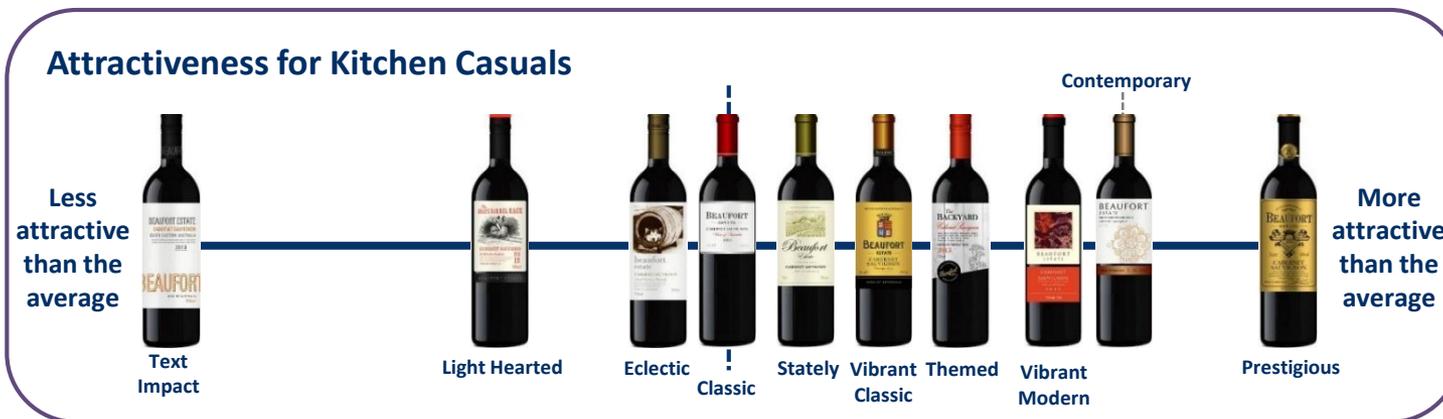
Vibrant Modern

NOTE\* Percentages based on UK Portraits report 2013

Source: Wine Intelligence Vinitrac® UK, March and August 2013, n=2,049 UK regular wine drinkers

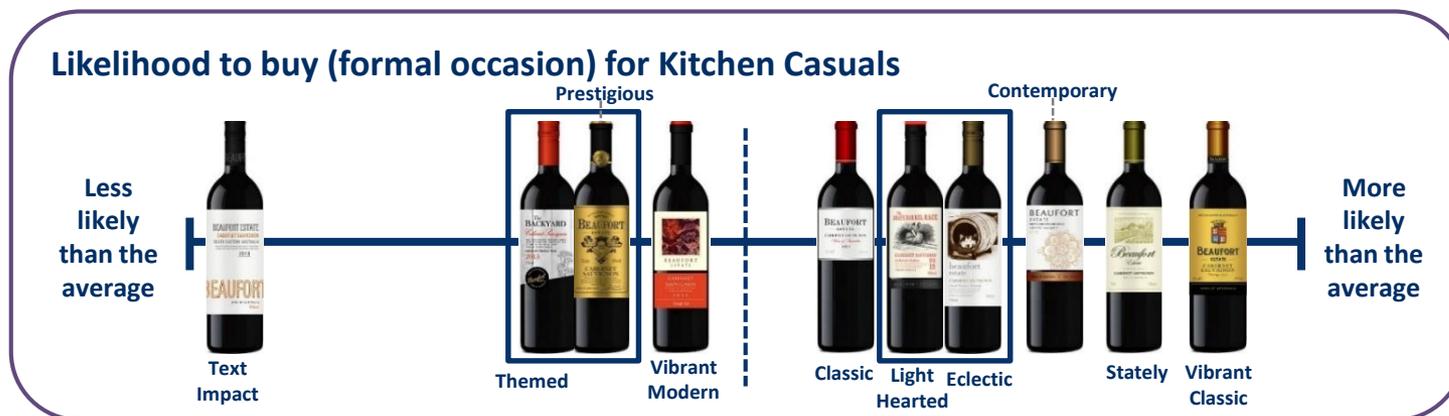
Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

# Kitchen Casuals & label attractiveness: Similar positioning to the average although Stately does not connect as well with these consumers



\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

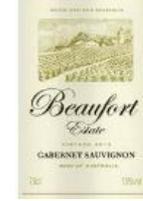
# Kitchen Casuals & purchase intent: Unlike most other portrait segments, Vibrant Classic is more likely to be purchased for formal occasions than Prestigious



\*Note: Dotted line represents the average point of each continuum  
 Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers

- Appendix

# Variance analysis of imagery statements for 10 UK label categories:



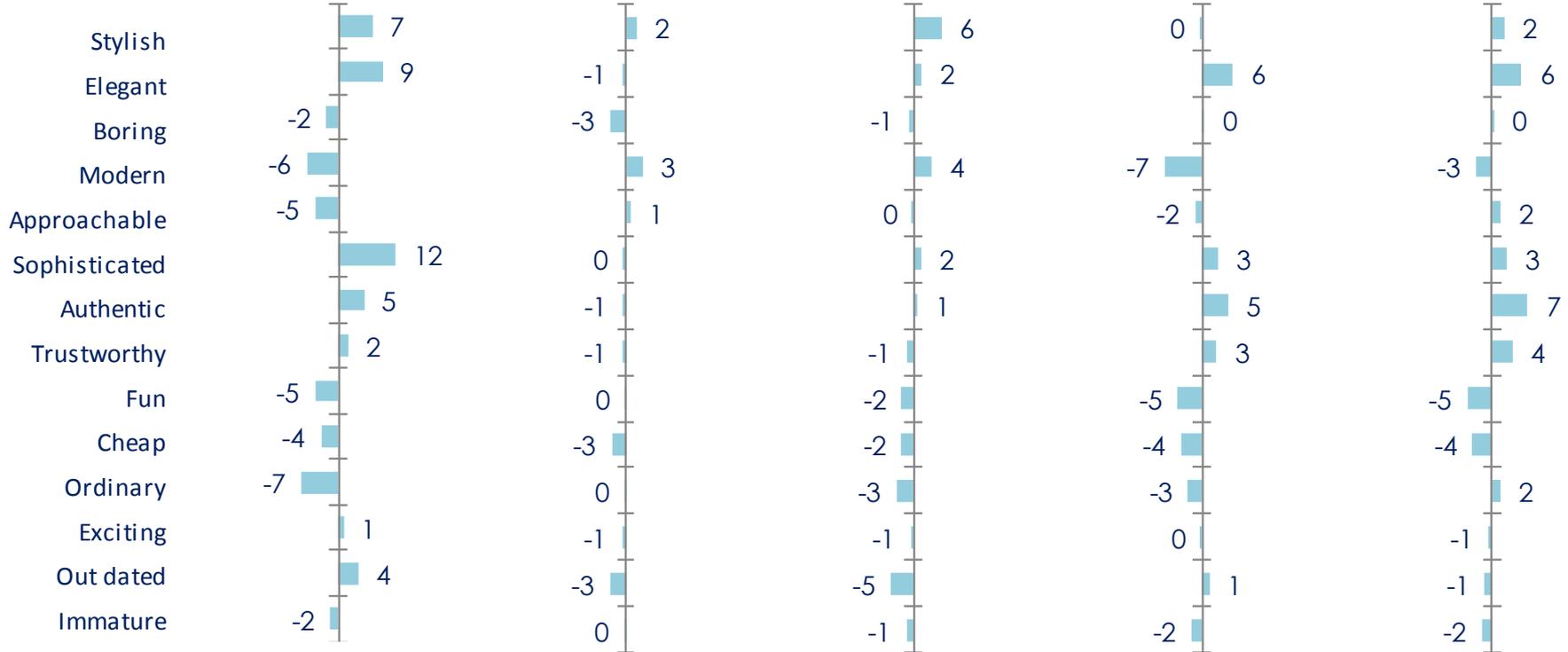
Prestigious

Themed

Contemporary

Stately

Classic

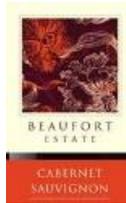


Note: Variance analysis looks at imagery statements across labels to identify what each label stands for (or not) compared to other labels  
 Numbers are representative of the distance from the aggregate mean across all labels for each statement

Source: Wine Intelligence, Vinitrac® UK, May '14 (n=1,007), UK regular wine drinkers



# Variance analysis of imagery statements for 10 UK label categories:



Vibrant Modern



Vibrant Classic



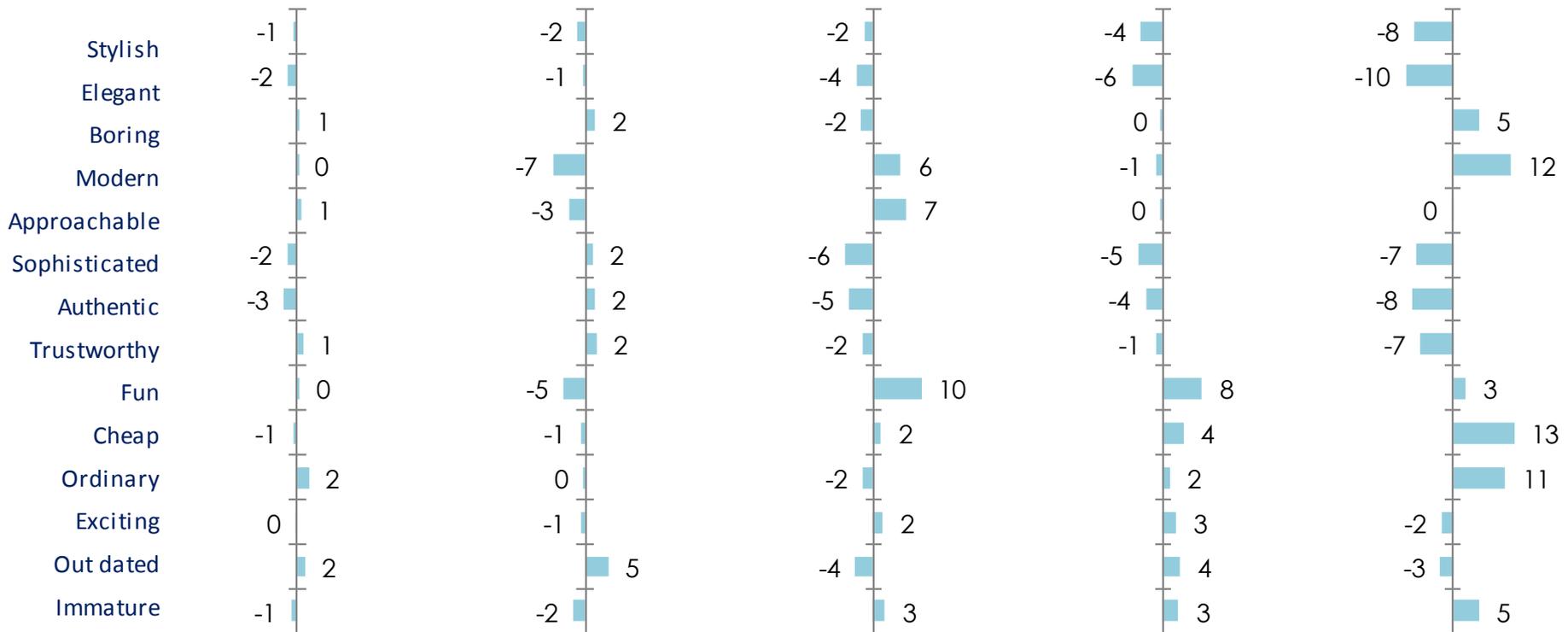
Eclectic



Light Hearted



Text Impact



Note: Variance analysis looks at imagery statements across labels to identify what each label stands for (or not) compared to other labels. Numbers are representative of the distance from the aggregate mean across all labels for each statement.

- Methodology

Positioning of the labels designs was based on the following form of analysis:

## Variance analysis

- Questions on attractiveness, quality perception, likelihood to buy and price expectations were asked in the May 2014 online Vinitrac® survey
- Means were analysed for each of these means and then an aggregate mean for each measure across all label designs was calculated
- The positioning of the labels was based on the variance of the individual label design away from the aggregate mean for all designs

- Data collection:
  - The data for this report was collected in May 2014
  - Data was gathered via Wine Intelligence’s Vinitrac® UK online survey and is representative of all UK regular wine drinkers
  - Sampling: quotas / stratified
- Screening criteria:
  - Respondents were required to drink wine at least once per month, to drink at least red, white or rosé wine and to buy wine in the off-trade and/or in the on-trade
- Data processing:
  - Invalid responses (those who completed the survey too quickly, or who “straight-lined” through selected questions) were removed from the sample
  - The survey was post-weighted in terms of age and gender
- Sample distribution:
  - The distribution of the sample is shown in the table

UK		
<i>sample size</i>		1,007
Gender	Male	47%
	Female	53%
	<i>Total</i>	100%
Age	18-24	11%
	25-34	15%
	35-44	17%
	45-54	18%
	55-64	17%
	65 and over	22%
	<i>Total</i>	100%

Source: Wine Intelligence, Vinitrac® UK, May'14, n=1,007 UK regular wine drinkers

## 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

# Wine Intelligence Ltd Terms and Conditions of Licence for Syndicated Research Products – key sections

## Definitions and Interpretation

The “Agreement” means the Agreement between Wine Intelligence Ltd and the Customer to provide a Licence for the use of the Syndicated Research Report(s) for Fees on these terms and conditions of business and as set out in a Proposal and the Acceptance of Proposal

“WI” is Wine Intelligence Ltd, trading as Wine Intelligence.

“Customer” means the person or entity purchasing the Licence for the use of the Syndicated Research Report(s)

“Proprietary Information” means all information contained in the Syndicated Research Report(s) and associated briefings or presentations by WI, plus all logos, Processes, third party data and formats contained therein

“Licence” means the Customer’s right to use, store, retrieve and disseminate the Syndicated Research Report(s), as defined by the Agreement

“Acceptance of Proposal” means the document provided by the Customer to WI confirming the terms of engagement of WI to provide the Customer with the Licence for the use of the Syndicated Research Report(s)

“Fees” means the fees payable by the Customer to WI, as set out in the Contract, plus VAT at the current rate, subject to exemptions as set out in UK and EU law

“Processes” means any research processes, techniques and methodologies used in the creation of the Syndicated Research Report(s)

“Proposal” means the specification of the Syndicated Research Report(s) by WI to the Customer

“Syndicated Research Report” means a written document containing Wine Intelligence copyright materials such as data, information, insight, commentary, either written, oral, video, or audio and, where appropriate, copyright materials of a Third Party that have been reproduced by permission

“Representative Organisation” means any body, association, trading group, generic organisation or any other coalition of interested parties, howsoever constituted, that acts on behalf of a broader group of stakeholders

“Subscription Products” means Syndicated Research Reports delivered to the Customer periodically as part of an ongoing Agreement

## 1. Engagement

The Customer engages WI to provide the Syndicated Research Report(s), and WI agrees to do so upon the terms of the Agreement for payment of the Fees.

The Fees for the Syndicated Research Reports shall be priced in Pounds Sterling. WI will publish indicative prices in Euros, US Dollars, Australian Dollars, Canadian Dollars from time to time, and the Customer will have the opportunity to pay for Syndicated Research Reports using these currencies. Should the Customer opt for this form of payment the exact amount payable will be based on the prevailing exchange rate at the time of the execution of the Agreement.

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2.1 The Copyright in the Syndicated Research Report(s) shall at all times vest with WI. The copyright in all artwork, data and copy for each element of the report created and assembled by WI shall at all times remain the property of WI.

2.2 All copyright and any other intellectual property rights in any material produced supplied or made available by a third party to WI for inclusion in the Syndicated Research Report shall remain the property of the third party. The Customer warrants its title to WI, except as may be expressly disclosed in writing, and agrees to indemnify WI against any claims by third parties in respect of any infringement of their copyright or other intellectual property rights.

2.3 WI asserts to the Customer its moral right to be identified as the author of the Syndicated Research Report in accordance with the UK Copyright Designs and Patents Act 1988 Section 77 and 78, and shall be entitled to hold itself out as the author of the Syndicated Research Report (and in particular the research undertaken in the process of completing the Syndicated Research Report) as part of WI’s own general marketing activities. WI shall be entitled to publish the name of the Customer in association with the Syndicated Research Report(s) as part of this general marketing activities.

2.4 The copyright in the Processes used to execute the Syndicated Research Report shall remain the property of WI throughout.

## 3. Licence

3.1 WI grants to the Customer under the Agreement a non-exclusive Licence in perpetuity to store and retrieve an electronic version of the Syndicated Research Report(s)

3.2 The Customer is entitled to disseminate the Syndicated Research Report(s) within its immediate organisation, including organisations affiliated by majority shareholdings, legally liable partnerships, or other majority ownership structure

3.3 If the Customer is a Representative Organisation, the entitlement outlined in Clause 7.2 DOES NOT extend to parties who hold membership or similar interest in the Representative Organisation, except by specific written permission from WI and the payment of further Fees associated with a Multi-User Licence

3.4 The Customer is entitled to extract elements of the Syndicated Research Report and re-use them for internal and external presentations, subject to the doctrine of Fair Use

3.5 At all times the Customer must identify any information extracted from the Syndicated Research Report in 7.5 above as being from WI

## 4. Warranties

No advice or information whether oral or written provided by WI to the Customer through the Syndicated Research Report(s) shall create any warranty not expressly stated in this Agreement.

The Client warrants and undertakes to abide by the UK Copyright Designs and Patents Act 1988 Section 77 & 78, and undertakes to obey the copyright restrictions on any materials received as part of this Agreement.

Please contact Wine Intelligence for full terms and conditions



For more information about Wine Intelligence please contact us:

Wine Intelligence  
109 Maltings Place  
169 Tower Bridge Road  
London  
SE1 3LJ

Telephone: +44 (0)20 7378 1277  
Email: [info@wineintelligence.com](mailto:info@wineintelligence.com)  
Web: [www.wineintelligence.com](http://www.wineintelligence.com)  
Twitter: <http://twitter.com/wineintell>  
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