

Report Brochure



US WINE MARKET LANDSCAPE



OCTOBER 2014



REPORT PRICE • GBP 2,500 • USD 4,125 • 5 Report Credits

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Plus supporting data in Excel:

- All Vinitrac® questions with cross-tabulations by gender, age, and US regions

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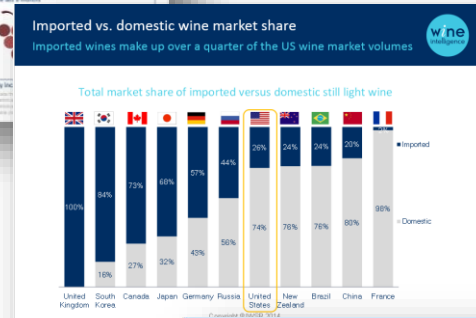
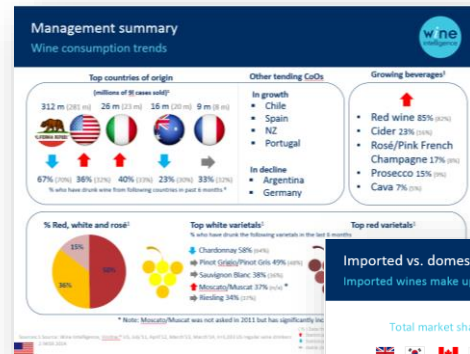
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Price also includes
**supporting data in
 Excel**

(All Vinitrac® questions with
 cross-tabulations by
 gender, age, and US
 regions)

112 page
 PowerPoint
 report



Country of origin purchase
 Full table of results - short and long term tracking

Country of origin purchase
 % who last bought the following wine-producing countries
 (Base: All US regular wine drinkers n=10,232)

Rank (2014)	Country of origin	2011	2012	2013	2014	Short term trend '13-'14	Long term trend '11-'14
1	California	70%	63%	67%	67%	↔	↔
2	Italy	33%	33%	32%	40%	↔	↔
3	Other/USA (e.g. another state in USA)	32%	32%	32%	30%	↔	↔
4	France	32%	32%	34%	33%	↔	↔
5	Australia	30%	24%	26%	23%	↔	↔
6	Spain	18%	18%	22%	20%	↔	↔
7	Chile	18%	15%	15%	18%	↔	↔
8	Argentina	17%	15%	15%	17%	↔	↔
9	Germany	15%	15%	16%	14%	↔	↔
10	New Zealand	13%	8%	13%	15%	↔	↔
11	South Africa	7%	6%	8%	8%	↔	↔
12	Portugal	5%	5%	6%	7%	↔	↔
13	Canada	4%	5%	6%	4%	↔	↔
14	Hungary	3%	3%	2%	2%	↔	↔
15	Russia	3%	2%	2%	2%	↔	↔
	Other	3%	2%	2%	3%	↔	↔
	Don't know	12%	14%	12%	9%	↔	↔



Excerpts from the introduction



“Over the past few years the USA has consolidated its position as the largest wine market in the world. It’s still on the up, though there are some question-marks over its long-term growth potential”

“Since our last report we’ve recalibrated the market and estimate that since 2011, the number of regular wine drinkers has increased from 81 to 91 million. These Americans are now drinking wine more frequently than ever, though their rate of growth appears to be slowing. Per capita consumption remains less than half of that of a typical European market”

“So where is growth coming from right now, and which are the demographic groups are drinking more and more frequently?”

“We’ve used the latest Vinitrac research to give us an in depth insight into these consumers behaviour, and we have categorised them by age, location, earnings before we even begin to thoroughly break down their wine spending habits”

“This report aims to answer these questions and give you clearer picture of a complex market that can sometimes be hard to get a proper grasp of”



- Data collection:
 - The data for this report was collected in July 2011, April 2012, March 2013, October 2013 and March 2014.
 - Data was gathered via Wine Intelligence’s Vinitrac® online survey
 - Sampling: quotas / stratified

- Screening criteria:
 - Respondents were screened to ensure that they drink wine at least once a month, drink at least red, white or rose and buy wine off-premise and/or on-premise.

- Data processing:
 - Invalid responses (those who completed the survey too quickly, or who “straight-lined” through selected questions) were removed from the sample
 - The data is representative of US regular wine drinkers in terms of age, gender and region of residence.



- 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

} Sub-categories



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



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



REPORT PRICE: • GBP 2,500 • USD 4,125 or 5 Report Credits

Format: 112 page PowerPoint (PDF) + supporting data in Excel

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