

Report Brochure



# US SPECIALIST & INDEPENDENT WINE RETAIL REPORT

OCTOBER 2016



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# Excerpts from the introduction



‘Generalising about wine retail channels in the US market is no easy feat. Given the complexity of the country’s alcohol laws, which differ widely from state to state and, in some cases, even from county to county, tracking developments in any given channel can seem like somewhat of a tall order.’

‘One principal development is the seemingly inexorable rise of social media as central to the business strategies of specialists and independents. As small businesses, specialists and independents have to work especially hard at publicising themselves among their target customer base, and this base is shifting with a growing velocity in the direction of Millennials..’

‘A second universal trend that affects the world of US specialist and independent wine retail is an increasing emphasis on direct-to-consumer sales. Recent changes to the law in some states have resulted in this emerging channel taking on a new importance and flooding consumers’ homes with a vast virtual range of brands, regions, and countries of origin.’

‘This is where the largest concentration of specialist and independent retailers is to be found, and where the two principal types of consumers for this channel are most clearly to be seen – and contrasted... Targeting these two very distinct consumer types effectively will be crucial for the specialist and independent sector in the US going forwards, if they wish to survive, that is, in an increasingly competitive and increasingly online retail climate.’

‘As experts and enthusiasts who capitalise on the richness and diversity to be reaped from the world of wine, if they play their cards right they can only stand to benefit.’



# Research methodology:

## Sampling and quotas used for Vinitrac® USA



- The quantitative data for this study was collected in July 2016, June 2015 and March 2014
- Data was gathered via Wine Intelligence's Vinitrac® online survey of:
  - 2,027 US regular wine drinkers (2014)
  - 2,000 US regular wine drinkers (2015)
  - 2,003 US regular wine drinkers (2016)
- Respondents were screened to ensure they met the following requirements:
  - 21+ years old
  - Drink red, white and rosé wine at least once a month and buy wine in the off- and on-premise
- The data is representative of US regular wine drinkers in terms of age, gender and region
- **In 2016, 1,227 respondents bought wine in “an independent wine or liquor store”, forming the base for the US Specialist & Independent Retailers consumer survey 2016. 776 respondents did not.**



- 22 Trade Respondents surveyed in August 2016
- A further 5 Trade Respondents were interviewed in-depth in September 2016 to gather more substantiated and nuanced views on the answers given in the trade survey.
- Interviews followed a pre-determined discussion guide, which covered the US Specialist & Independent sector and was designed to probe further on findings evident in the quantitative consumer survey and the trade survey.
- All respondents are actively involved in the US Specialist & Independent environment.

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