



FLAVOR AND VARIETAL PREFERENCE IN THE US WINE MARKET

JUNE 2017



Flavor and varietal preference in the US wine market 2017



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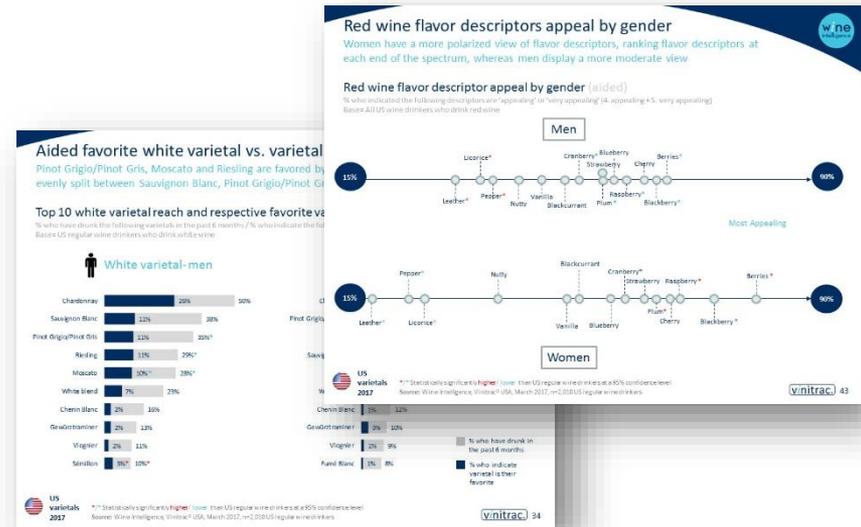
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The **Flavor and varietal preference in the US wine market 2017** report includes:

- An 80-page PowerPoint report with the latest information regarding the Portuguese wine market, supported by:
 - Wine Intelligence Vinitrac®
 - Wine Intelligence market experience
 - Secondary sources



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As established by Wine Intelligence’s Compass Report 2016-17¹, the United States is the largest and most attractive wine market in the world. Supported by a robust economy and a growing regular drinking population, the nation is still registering healthy growth within the wine category, with no immediate sign of slowing down. As more producers aim to claim a slice of this attractive pie, Wine Intelligence presents the inaugural “Flavor and Varietal Preference in the US wine market” report for 2017. This report investigates what US regular wine drinkers are consuming, what their favorite varietals are, and which specific wine descriptors they find appealing and unappealing.

Wine descriptors are a crucial element in the marketing of wine, with the simple, few words on the back of a label or on a tasting note holding the potential to captivate a consumer - or just as easily deter them. For this investigation, we have divided common wine descriptors into two groups; ‘style’ descriptors and ‘flavor’ descriptors. Style descriptors express the general structure and body of a wine, whether it be crisp, fresh, juicy or bold. Flavor descriptors are those that describe more specific wine characteristics such as tropical fruit or blackberry.

For white wines, descriptors that illustrate approachable styles of white wine, such as easy drinking, smooth and fresh demonstrate strong appeal within the US market and, equally as important, are very rarely seen as unappealing. In addition, a strong preference exists for flavors that indicate a level of fruit sweetness (apple, peach, and tropical fruit).

When we turn our attention to red wine, US regular wine drinkers find style descriptors that combine harmonious characteristics (smooth, easy-drinking) with heavier classical indicators (full-bodied, rich) most appealing for red wine. The full spectrum of berries are the most appealing specific flavor descriptors, with fruit based descriptors in general being seen as more appealing than herbal or savory characteristics. As with white wine, we find that those drinkers under 45 are significantly more likely to find both style and flavor descriptors appealing than those over the age of 45, perhaps reflecting the older half’s experience in the wine marketplace and belief in their own knowledge.

In this report, we also explore the relationship between the varietals that consumers are drinking and those that they list as their favorites. Chardonnay and Merlot hold the number one ranking for both consumption and listed favorite for both white and red wines respectively. In terms of gender, women are more likely than men to list Moscato as their favorite, whilst consumption of red wines is relatively even between the genders.



Liz Lee
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Research methodology

- **Data collection:**
 - The data for this report was collected in March 2017 in US
 - Data was gathered via Wine Intelligence's Vinitrac® US online survey and is representative of all US regular wine drinkers
 - Sampling: quotas-based; quotes were defined in terms of age and gender
- **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

How does Vinitrac® work?

- **Defining the right samples:**
 - Wine Intelligence, with the support of global research companies (e.g. TNS, YouGov), regularly runs calibration studies in each market in order to define demographic specifications of the wine consumers and the size of the market (i.e. penetration of wine consumption)
- **Running the online survey :**
 - Invitations to participate in an online survey programmed by Wine Intelligence are then distributed to residents in each market
 - Respondents are directed to a URL address, which provides access to the online survey
 - Based on given criteria (e.g. age, beverage, frequency of wine consumption) respondents will either proceed or screen out of the survey
 - Wine Intelligence monitors completed responses to build samples representative of the target markets' wine drinking population based on the most recent calibration study
- **Cleaning the data:**
 - When a representative sample is logged, the survey is closed
 - Wine Intelligence will then clean out all invalid data points (e.g. those who sped through the survey or gave inconsistent answers to selected questions) and weight the data in order to ensure representability



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