

GLOBAL CONSUMER TRENDS

A close-up photograph of a person's hands holding a silver and black camera. The camera is a mirrorless or compact model with a large lens. The person is wearing a blue and white striped shirt. The background is blurred, showing what appears to be a wooden railing or fence. The overall tone of the image is warm and artistic.

Which new trends have captured the consumer's imagination? Just how prepared is the US market to weather 2017? And will fruit-flavoured wines be a hit?

Tier 2 cities in China: high risk, high reward?

Wine labels through the eyes of the Australian consumer



Wine Intelligence

Vinitrac® 2017

2017 sees the launch of four waves of the world's largest ongoing research study of wine drinkers. This March, July and October, you have the opportunity to find out more about your wine consumer. Submit bespoke, confidential questions or purchase one of our insight packages (such as a brand health check, label and packaging test, wine usage or attitude study) and truly understand your market.

Vinitrac® Sparkling February 2017

For the very first time, Wine Intelligence launches a specialised Vinitrac wave which will explore consumer attitudes towards Sparkling wines from in 10 key global markets.

Questionnaire deadline: 14th February
Fieldwork start: from late February

Vinitrac® March 2017

Questionnaire deadline: 24th February
Fieldwork start: from mid-March

Vinitrac® July

Questionnaire deadline: June 30th
Fieldwork start: from mid-July

Vinitrac® October

Questionnaire deadline: September 22nd
Fieldwork start: from early October

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Comment

At the best of times, the business of forecasting is a bit of a rollercoaster. Those in the futurology business in 2016 would have done well to heed the advice of an anonymous pre-war Danish politician, whose unimprovable advice was “Never make predictions, particularly about the future”.

Yet even as we grow used to a time of heightened uncertainty and unprecedented change, it would be foolish not to try to document, analyse and at least try to understand the inexorable changes in our patterns of living, and draw some dotted line towards the future and what these changes might yield.

This issue of WineIQ therefore arrives with a challenging purpose: to help its readers unwrap and decode the wine world in 2017. We observe the prospects for the American wine market, which paradoxically combines accolades as the world's most lucrative place to sell wine, and the world's most complex and bureaucratic supply chain.

A more 30,000-foot view can be found in this issue's cover story, which outlines the latest instalment in Wine Intelligence's ongoing research and categorisation of major consumer trends. To some more familiar trends in recent years – Fusion (of products, services and ideas), and Instant (delivery, gratification) – we add more mid Twenty-teens offerings such as Individual (the need to personalise our world and make this adaptation part of our public image) and Mindfulness (our increasing pre-occupation with our own wellbeing), among others.

We also travel to China in the company of our redoubtable country manager, Chuan Zhou, to uncover the truth about the enormous potential for wine among the tens of millions of newly-monied Chinese citizens living in Tier 2 cities, and the challenges of building an effective supply chain and communications architecture to reach these new markets over the next few years. Finally, we showcase some recent work we have done in the fruit-flavoured wine category, and in

2017 will also mark some firsts for Wine Intelligence. We are partnering for the first time with IWSR, a long-standing provider of sales data in wine and spirits, to produce an interactive data tool which combines our brand health data with their brand sales data (more details on page 20). We are also expanding our successful Vinitrac® omnibus consumer survey platform to launch a dedicated version for Sparkling Wine – details on the opposite page. Do get in touch if either of these are of interest. Best wishes from us all for success this year.

Richard Halstead
COO, Wine Intelligence





News and events

A new year brings new challenges for the global wine industry. Wine Intelligence's 2017 Global Consumer Trends report and Workshops shed light on what truly motivates consumers

The last quarter of 2016 saw Wine Intelligence delving into unexplored territory; alongside the annual instalments of our UK and US Landscape Reports we examined the markets of Colombia and Mexico. 2017 will be another year where our team will plunge into the great unknown, flexing their expertise to bring you insights into the Chilean, Irish and Hong Kong markets. Our upcoming Vinitrac® waves – our first Sparkling Wine wave to be launched in February, and our still light wine March wave – will give us plenty of food for thought going into the New Year.

We also launch our latest series of Workshops this February, the Global Consumer Trends 2017 series. Wine Intelligence is taking these interactive sessions to the road, across Europe, the Americas and Australia in Barcelona, Porto, Santiago, Sydney, Geisenheim and London. Our analysis of the most influential and

widespread trends sweeping the globe will equip you to apply these trends to drive the wine category forward and identify the next market opportunities for your business.

A new collaboration with the IWSR, the **Wine Profiler Tool**, brings together IWSR's volume and value data on the global consumption of wine, spirits and RTDs in line with Wine Intelligence's data on brand health, consumer affinity and choice cues. The interactive platform combines brand sales data with volumes, prices and consumer affinity and demographics all in one place for leading brands in 15 of the world's most dynamic markets for imported still light wine. ■

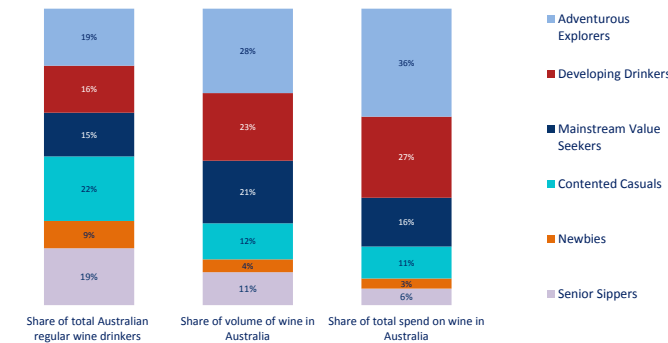
For further information about our upcoming workshops, Vinitrac waves and IWSR tool, please visit www.wineintelligence.com

STATS OF THE QUARTER

Latest findings from our reports

Portrait of an Australian consumer

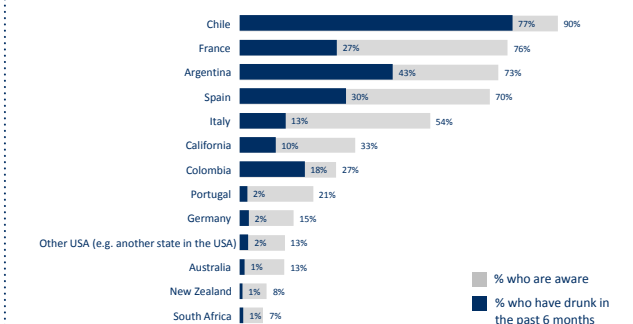
Adventurous Explorers and Developing Drinkers together account for 64% of total spend on wine, despite making up only 35% of the regular wine drinking population



Source: Wine Intelligence Australia Portraits 2016 Report

Colombian drinkers choose Chile

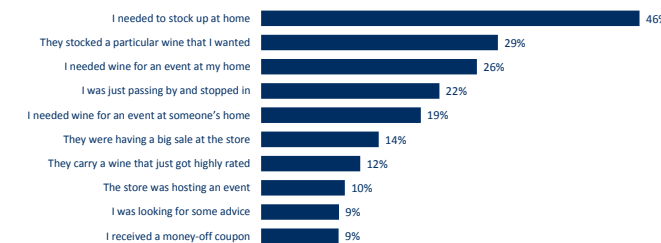
Chile has cornered the Colombian market: the majority of Colombian wine drinkers (90%) are aware of Chile as a wine-producing country. It is the most successful country of origin at converting awareness into purchases



Source: Wine Intelligence Colombia Landscapes 2016 Report

The draw of US Specialist & Independent retailers

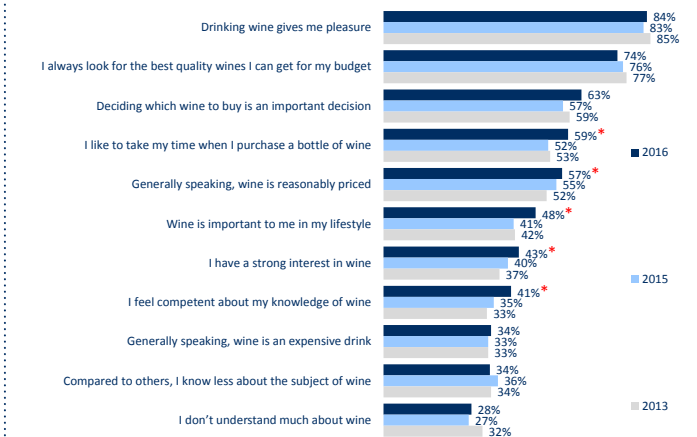
We shed light on why US regular wine drinkers purchase wine from specialist wine retailers: to keep their cellars full and to buy a particular favourite wine



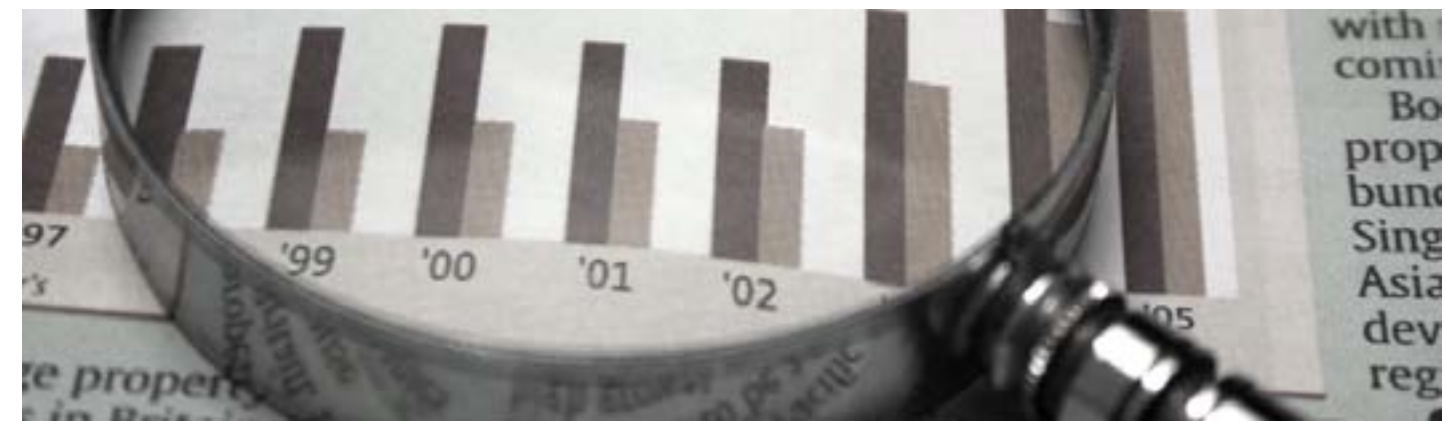
Source: Wine Intelligence US Specialist & Independent Retailer 2016 Report

What drives UK consumers to drink

An insight into the UK consumers' attitude towards wine with tracking data from 2013 and 2015



Source: Wine Intelligence UK Landscapes 2016 Report



Global Consumer Trends 2017

A year's worth of quantitative and qualitative research informs our insight into this year's driving trends



Each year, Wine Intelligence reviews the global market to tease out the most influential and newest trends in consumer goods and services. We often find that previously identified trends evolve and grow over time; sometimes splitting off into nascent sub-trends just waiting to permeate the public consciousness, other times simply fading into obscurity. This year we are confident of our collection of twelve key trends which can be neatly compartmentalised into over-arching themes: Well-Being, Engage, Connect and Express. In our 2017 Global Consumer Trends Report, we have collated a range of examples which illustrate how the best businesses are embracing these trends to meet the needs of the consumer.

General **Well-Being** is an example of one trend that has adopted several guises. Supermarket shelves are laden with food and drink which promise to boost one's physical health while the emerging market of mental health aids continues to grow.

The means by which products promote a strong and healthy body vary; their credentials can be boosted in one of two ways. The first is to **Exclude** naturally occurring elements in food and drink, stripping away the likes of gluten, dairy and alcohol to reveal more wholesome, hearty and healthy products underneath. Leading food and drink manufacturers are sourcing ingredients which carry the weight and richness of dairy but are made from alternatives while the 1% of coeliacs are revelling in the plethora of choice they have been afforded by a boom in gluten-free products. These foods give all the pleasure of the original products, but support the consumer's desire for a more health-driven alternative.

The second is to **Enhance** products, that is, to boost existing products with a dose of protein, vitamins or antioxidants. Even sweet treats and chocolates – usually the preserve of the less-than-healthy – are primed for this treatment with: Mars and Snickers have released a new healthy edition that clocks in under 200 calories and packs in 18g of protein.

In brief: 2017 Trends

Exclude - Removing or excluding naturally occurring elements, typically from food and drink, with the aim of improving health benefits

Enhance - Engineering food & drink, making it 'better for us' than the original

Mindfulness - Respecting our personal mental well-being, particularly within our increasingly demanding and fast-paced lives

Obsession - Focusing single-mindedly and clearly on one purpose, product or service

Fusion - Breaking traditional boundaries by combining, merging and blending between products & categories

Activate - Creating brand memorability through interaction

Exchange - Exchanging knowledge, services and products with others as part of the collaborative economy

Reduce - Recognising and prioritising the significant environmental and social impact delivered by reducing waste

Community - Feeling better about ourselves by supporting local & community organisations

Effortless - The desire for increasingly seamless transactions and improved efficiency

Instant - The increasing expectation of immediacy

Individual - Demonstrating our uniqueness and individuality

Though businesses have long-catered for the health-conscious, **Mindfulness** looks at the development of more and more products and services for those looking to de-stress and disconnect from a busy world.

Another of the larger themes at play, **Engage**, is concerned with how businesses are vying for fatigued consumers' attention by appealing to their niche desires, piquing interest through bizarre combinations and encouraging them to physically interact with their products. The three sub-trends - namely **Obsession**, **Fusion** and **Activate** - are best illustrated by our favourite examples.

Obsession is typified by single-dish restaurants and bars such as Campari's Negroni Bar, the logical conclusion to their #RediscoverRedcampaign. Over 30 different combinations and flavours were on offer but there was one consistent element: they all contained and celebrated Campari. It is also demonstrated by the host of niche gadgets and accessories that have come to market, such as Norlan's hand-blown glass designed for spirits. The glass is double walled, creating a hollow body glass that intensifies the colour of the spirit within – the perfect gift for the whiskey obsessed.

Fusion, on the other hand, seeks to create new and innovative combinations of flavours, categories and even brand partnerships, in order to lure potential customers. Some partnerships – such as Aston Martin and Silver Cross combining forces to engineer a super-premium pram – make sense. Others, such as the Finnish postal service Posti branching out into gardening (homeowners can pay their postal worker to mow their lawns), are less expected.

The last trend in this category, **Activate**, seeks to create brand memorability through interaction. Activating customers is not as easy as it once was. In a crowded marketplace, unique, noteworthy and often photogenic gambits need to be employed to create brand memorability. One of the most prominent methods to achieve this goal has been to get the product off a webpage or catalogue and back into the hands of the consumer: by

"Fusion, on the other hand, seeks to create new and innovative combinations of flavours, categories and even brand partnerships, in order to lure potential customers"

opening their own proprietary store in London, Dyson has allowed customers to see, touch and use their products in context. MinedripCoffee Shop is a pop-up which allows every customer to make their own self-drip coffee; originally an online coffee bean and coffee accessory retailer, a brick and mortar premises allowed them to engage with consumers face-to-face.

Organisations and community groups are helping people to use their skills, goods and services to strike a barter deal instead of simply exchanging only cash. The increasing array of platforms available to help people **Exchange** is just one of the symptoms of our increasing need to **Connect**. With time and space now precious commodities, people are now exchanging them in return for a fee - which is often much lower than the going business rate. eNeighbor, for example, connects neighbours or local businesses who are willing to accept a delivery on your behalf. You send your delivery to these trusted and vetted locals for a cost of just \$2.50 (USD).

Environmental awareness is hardly new, but there has been a boom in renewable technologies and platforms which allow consumers to connect ever more with the environment and boost their green credentials. Supermarkets such as Tesco and Wal Mart are now stocking 'wonky' fruit and veg, less-than-perfect produce that would usually go to waste. Global giants, as well as consumers, are in a rush to show their commitment: they have announced that all their data centres and all their international offices (employing over 60,000 staff) will be entirely powered by renewable energy in 2017. This tendency to **Reduce** – in terms of resources used and waste generated – is set to increase.

A sense of **Community** is increasingly important to consumers too; the Internet has long made it possible for groups of people with shared interests to connect over huge distances and cultivate a sense of community. Now it is bringing people a little closer to home together. It enabled almost 40,000 people in New Zealand to prevent a stretch of beautiful beach from

being sold to a private businessman through a crowdfunding campaign that raised nearly \$2.3million (NZD) and united local individuals into a powerful challenge.

Express is the last of our broad categories and covers both meanings of the word: the consumer's desire for the **Effortless** and **Instant** delivery of services and goods, and their use of purchasing as a means of personal **Expression**.

Making life and transactions quicker, seamless and low-stress has become of paramount importance for businesses seeking to provide expected and more desirable consumer experiences. Amazon is upping its game in the grocery sector and trialling a bricks and mortar store for employees in Seattle. Would-be customers open their app at the beginning of their shop and then simply load up their baskets. Their technology automatically records whatever you pick up off a shelf and tallies your total: surely the most fuss-free and effortless shopping experience to date (if it works!)

Instant delivery will soon be the norm, rather than a premium paid service. Fed up with the slow delivery of larger alcohol retailers and the high pricing of on-demand delivery companies, the founders of Swiftdrinks (in Australia) have created a well-priced instant drink delivery service. Alcohol orders will be delivered within 45 minutes and drivers can be tracked from your phone and contacted directly via call or text.

It is no secret that which brands consumers choose to engage with reflect, in part, some of their own key values. Millennials (more than any other demographic) agree that they use their purchases as a means of asserting their own individuality. It comes as no surprise then, that there has been a marked rise in the number of goods which allow consumers to put their own stamp on them. Take De Brabandere's range of beers designed for home blending, where consumers can assemble a bespoke beer that appeals to their own palate, for example.

These trends are sure to continue to exert influence over new product development in the coming year. We will see existing businesses embrace them and tailor their offerings to appeal to consumers and we will see new players emerge: start-ups and entrepreneurs who have come up with unique methods to appeal to our needs to **Engage**, **Connect**, be **Individual** and cultivate our **Well-Being**. ■

Examples



Reduce

H&M (Global)

H&M has announced a pledge to become "100% circular": this means they hope to use only recycled or other sustainable materials in the production of their clothing. Almost 3/5ths of clothing ends up in landfill as textile recycling facilities currently cannot separate fabrics made up of blended polyester, nylon and cotton.



Exchange

Blogfabrik (Germany)

Run by Kiosk Agency, a traditional 70 year old business, **BlogFabrik** is a co-working space that invites freelancers in creative media to work on their projects in a rent-free office. In exchange for the space (which includes a conference room, video-editing suite, photo studio, lounge and kitchen), they simply provide content for the blog and magazine.



Crobar (UK)

You don't *have* to go animal-free to go gluten-free and there's no better example than **Crobar**. Made from roasted ground crickets – about 32 per bar – these protein-packed snacks are less than 150 calories each.

Source: Wine Intelligence Global Consumer Trends 2017 Report



Instant

Campari (Global)

Campari has brought their ready-to-drink Negroni to the market in order to give consumers the perfect blend of gin, vermouth and bitters without delay.

Fusion

Nestlé (Japan)

Nestlé have long blended their chocolate wafers with unusual flavourings – from wasabi and soybean through to purple sweet potato – but this is the first edition to combine them with alcohol. The resulting white chocolate treat has 0.8% alcohol and a distinctive whiff of sake.



Enhance



Coconut Water Cans (US)

Available in coffee, vanilla, chocolate and almond, **Coco Libre** boost the health credentials of coconut water with a dose of 15g of protein. The source of protein is simply milk from grass-fed cows; as such, Coco Libre combines all the good from natural dairy (with none of the fat) with coconut water.



Global Consumer Trends Decoding the future

Join us at one of our interactive workshops to explore the latest in global behavioural and attitudinal consumer trends.

"Thanks again for the invitation to such an informative session – fascinating and brilliantly presented."

"The info on trends was very informative and really useful to know what is happening in the wider market. Overall, very informative and enjoyable."

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The US Market in 2017

A year of change, sparkle and visuals

Perhaps the biggest questions facing the global wine industry in this New Year will revolve around the American economy. How will the new occupant of the White House behave? What will be the implications of last month's decision by the Federal Reserve to raise interest rates? Will the archetypal US consumer – middle income, home-owning, suburban, working hard but seeing life get tougher – feel confident enough to make more discretionary purchases, and initiate or increase their commitment to a category such as wine?

In order to get to grips with these hot-button issues, my colleagues and I in the US market team have been trying to unpick some of the data and insight to give a more long-term and nuanced view of the prospects for this crucial engine of the wine industry's well-being.

We kick off by acknowledging that America is still the largest and most reliable growing wine market in the world. In 2015, around 317 million 9L cases of still wine were sold (source: IWSR), of which just over 80 million cases (31%) were imported. In the sparkling category, around 20 million cases were sold, of which just under half were imported. Both still and sparkling are showing year-on-year growth: according to Liz Thach MW's excellent annual compendium of US wine industry statistics, the US market for wine has grown for 23 consecutive years (source: www.lizthachmw.com).

Early indications for 2016 seem positive. Sales in the direct-to-consumer channel rose 19% in the year to October 2016, to top USD 2 billion for the first time. This reflects both a growth in interest in buying wine online and a relaxing of regulation which allows residents of certain states, such as Massachusetts, to buy wine directly for the first time. However, there is no guarantee that the broader market (which will start



Growth and decline in the US market

	Beverage	Regions of origin	Red varietals	White varietals
Main Growing 	Prosecco 28% (15%)	New York State 13% (11%)	Sangiovese 12% (10%)	Fumé Blanc 11% (9%)
			Grenache 9% (9%)	Vogner 10% (7%)
			Carménère 9% (5%)	Sémillon 9% (6%)
Main Declining 	Red wine 79% (33%)	Napa Valley 42% (32%)	Merlot 50% (33%)	Chardonnay 48% (38%)
	White wine 75% (30%)	Sonoma 19% (27%)	Cabernet Sauv. 44% (31%)	Pinot Grigio 41% (40%)
	Beer 60% (67%)	Tuscany 13% (18%)	Pinot Noir 42% (47%)	Riesling 31% (34%)

Source: Wine Intelligence US Landscapes 2016 Report

reporting data for 2016 over the next few weeks) will see growth. If anything, some commentators are wondering whether America's 23-year winning streak is about to come to an end - in still wine at least.

In recent years, much of the industry's attention has been focused on how much more momentum is left in this remarkable growth story. The optimistic among us would see potential for further growth in per capita consumption of wine by US adults as it remains relatively low compared to other - mainly European - developed markets, despite a quarter century of growth. American adults drink just 12 litres of still wine a year, according to IWSR data. For reference, that is less than half of what Germans consume (30 litres) and a quarter of what French, Portuguese and Italians put away (all around 44 litres).

In sparkling wine, the differential between the US and the rest of the developed world is even more pronounced. Americans drink just 0.75 litres of sparkling a year; Germans drink 8 times as much (6 litres) and even

British consumers manage 2 litres. That said, US consumption of sparkling wine is growing much faster than still wine – imports of sparkling were up 9% in 2015 and in 2016 this growth is expected to continue – and possibly accelerate.

Another key metric for future growth is the number of active monthly wine drinkers in the US. Wine Intelligence market calibration tracking studies have shown that the population of wine drinkers grew from around 78 million monthly wine drinkers in 2009 (approx. 36% of the then adult population) to 93 million in 2016 (40%). This growth can partly be attributed to an 8% increase in the adult population during the same period.

Whilst it is hard to predict the future of this particular metric, the evidence from our calibration studies appears to show that, in the short term at least, the rate of growth in the still wine drinking population is slowing. In contrast, the growth of sparkling wine drinkers - albeit from a small base - is accelerating. Our calibration data shows

A nation divided: the US at a glance



Source: Wine Intelligence US Landscapes 2016 Report

that in 2010 around 31 million Americans said they drank sparkling wine; in 2016 that number had risen to just under 42 million. If the growth in volumes of still wine sold in the US is slowing, what can we deduce from the behaviour of those consumers still active in the market? Perhaps, as befits a country whose relationship with wine arguably dates back 50 years (two generations), the greatest interest in wine is being shown by the newest generation of drinkers. Those under 35 years old are slowly replacing the oldest members of the Baby Boomer generation as regulars in liquor stores and winery tasting rooms.

This changing of the guard is, perhaps, driving the growing sense of adventure on the part of most of these consumers (as illustrated by our tracking data on consumer attitudes towards the wine category). They are now exploring niche varietals, along with wine from a more diverse range of wine regions, more frequently. They have a heightened interest in newer-to-market, smaller wine brands and find themselves more influenced by label design than before. Their interest in the category is leading them to spend a bit more on a bottle of wine than their elders, but they tend to have a broader portfolio of alcoholic (and non-alcoholic)

beverages, so the volume of still wine they buy is actually lower than drinkers in their 50s and 60s.

It is also younger consumers who are generally driving the trends towards sparkling wine; here, their consumption volumes are outpacing those of older consumers. The 21-34 age ground account for around a third of sparkling drinkers, rising to 41% of Prosecco drinkers (the fastest-growing sparkling wine type in the US). In data collected for the Wine Intelligence US Sparkling Wine Report 2016, we noted that over half (51%) of 25-34 year old sparkling wine drinkers say they drink sparkling at least once a week. Just 14% of the 55-64s in the category were weekly drinkers of sparkling (source: Wine Intelligence Vinitrac® Sparkling, February 2016).

The focus on the new generation of drinkers is understandable and their enthusiasm for both new styles of still wine, and for sparkling wine in general, clearly excites the world's wine producers. It's important to note that this bright and shiny segment of the market tends to overshadow the more mainstream, everyday market for wine. Our latest Landscape report

for the US wine market notes that, for all the hype about the so-called 'Millennial' generation, the average age of the American wine drinker is rising: 39% of monthly wine drinkers are now over 55 years old, compared with 32% in 2010.

So what are our predictions for this year? We think that still wine volumes for 2016 will be flat or only marginally up on 2015, while price per bottle will rise as the sub-\$5 off-premise category falls further. The \$5-10 category remains static, and the growth (from a low base) will come from \$15+. Millennials' desires for the new - and for products that speak to them visually - will exert increasing influence over restaurant and bar wine lists and packaging design. Sparkling wine will show healthy growth of around 5% overall, with imported fizz driving momentum and Prosecco continuing to take the lion's share of it. The very real possibility of Prosecco shortages in 2017 and 2018 (and attendant price rises) may dampen demand. However, should this occur, we believe that substitutes from Italy, other producer nations and even domestic producers, will bridge the gap. ■

We like David, but buy Goliath

Why niche brands are less common than we think

We humans seem to have an unconscious liking for a good underdog story. We cheer the idea of David vs. Goliath, the Tortoise and the Hare, Senna vs. Prost, Leicester City vs the Premier League, Ben & Jerry's vs Haagen Dazs; and of course, wines produced on cliff faces or in deserts, against all odds.

Our attraction to a feel-good story has crept into Brand Management. Nowadays it's not cool to manage a mainstream brand because it has "lost its true followers" (for which we might interpret: "no one who the brand manager would like to hang out with"), while a niche brand with a small-ish group of enthusiastic social media users is far more attractive (possibly because it includes people who the brand manager would like to hang out with).

Niche branding is what Chris Anderson talked about in his seminal 2004 book *The Long Tail*. These brands are not funded by some giant corporation, but instead are empowered by the wisdom of online crowds to become success stories within a defined space – funky gumboots for festivals, hairbrushes for frizzy hair, jams made with certain eco-friendly ingredients. A mainstream brand is, well, Heinz soup, or Adidas sportswear.

In the wine world, some would argue that almost all brands in a complex and diverse category are, by definition, niche. While it's true that a long tail clearly exists in the wine category (we once estimated that ProWein plays host to around 300,000 distinctive products every year), just as in any other consumer product category, there are mainstream brands as well. As it turns

out, there are quite a lot of the mainstream brands, and surprisingly few successful niche brands.

At Wine Intelligence we regularly measure the popularity of brands in over 30 of the most important world wine markets. In each market we measure over 50 brands and ask a representative sample of wine consumers which brands they are aware of and which brands they actually buy. The interesting thing is that we can measure the relative performance of different brands regardless of size. We call that measure "conversion to purchase", that is, the proportion of consumers who are aware of a given brand who say they have purchased it in the past 3 months. We can identify small brands that are bought by a large proportion of those who know them, i.e. a "niche brand" with high conversion into purchase. Alternatively, we can see if there are big brands that have become too well known and now fail to convert those who know them into buyers (that would be a mainstream brand with low conversion into purchase).

To answer the question about how many "niche wine brands" there are in a given market, we averaged the conversion rate from awareness into purchase of the top 5 brands

per market (the mainstream brands) and then we compared that figure to the rest of the smaller brands (typically the next 40-50 per market). Thus we can see quite quickly how many brands outside the top 5 which have as good or better conversion rates as those in the top 5. This gives us a proxy measure for how many niche brands there are in a given market.









When we did this exercise on our most recent dataset (Vinitrac® Global, October 2016) we found far fewer niche brands than one might think. Just 3% of brands showed higher loyalty (as measured by awareness-to-usage conversion %) than the top 5 brands across the markets studied. In the USA, Mexico or Brazil "niche" brands seem more common, but still account for 9% or less of the 50 or so brands we track.

The UK market is pretty unforgiving for small brands: just 1 brand (McGuigan) matched the top five brands in terms of conversion to purchase. In emerging markets the situation is even worse, as there are none (0%) brands outside the top 5 that are more loyal than market leaders such as Alpaca in Japan, Great Wall in China or 1865 and Montes in South Korea. Asian markets are a real "winner takes all" playing field.

What are the learnings? We should recognise that niche strategies are in many ways harder to maintain than mainstream strategies. Mainstream brands tend to have better distribution, and therefore benefit from an availability bias (you can only buy what is on shelf), appropriate pricing and highly memorable brand names, logos and colours. Being easy to buy and easy to find seem to be the key. Focusing on a small set of consumers and expect them to be loyal to you seems like a very risky strategy after all. ■

Proportion of 'niche brands' per market

% of brands outside the top 5 having same or better awareness-to-usage conversion rates

	USA	9%
	Brazil	6%
	Mexico	5%
	UK	2%
	Netherlands	2%
	Japan	0%
	Korea	0%
	China	0%

Source: Wine Intelligence Vinitrac® Global, October 2016

"Wine Intelligence is just what I needed – a specialist who provides credible, solid quantitative data in a category where it's often challenging to find that very thing."

Isabelle Catino,
Director of Marketing,
Kobrand Corporation

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"We are building a strong working partnership with the team at Wine Intelligence and are extremely impressed with their professionalism, dynamism and pro-activity."

Cristian Lopez,
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Concha y Toro

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Our services are based on a unique combination of solid research and extensive global wine trade experience. Some of our team have been involved in developing wines, and many of us have had prior experience of distributing wine, wine retailing and on-premise selling.

"We engaged Wine Intelligence to advise on business strategy as part of Esporão 2012-2014 plan. Their devoted and creative professional team, with extensive knowledge of global wine markets and advisory skills, were key to helping us find the best opportunities. I would strongly recommend their services."

João Roquette, CEO, Esporão



Chengdu (above). Chengdu consumers are more likely to be considered Adventurous Connoisseurs (10%) than their Chongqing counterparts (1%)

On another level

Scratching the surface of China's Tier 2 cities

Though we often hear China described as an “awakening dragon”, with a booming economy that rivals that of the United States, most of the country remains underdeveloped by Western standards. Step outside the comforting warmth of a Tier 1 city and into China’s lesser-known cities (some of which don’t roll off the tongue quite so easily) and the living conditions, retail infrastructure and social order all look very different.

This is particularly true when surveying the country’s imported wine market. Generally speaking, lower-tier cities do not have a sophisticated imported wine market like those of Beijing or Shanghai. What they lack in maturity, they gain in potential: these cities tend to offer more growth opportunities than higher-tier cities. The big success stories these days, then, can be uncovered in the less developed Tier 2 cities and beyond.

Logistically, the process of importing wine into different Chinese cities doesn’t vary too much; most municipals have similar administrative processes. There are a few exceptions to the rule, including free trade zones and ports. For instance Shanghai, with its international port, may prove to be more convenient for importers looking to access fast-moving consumer goods easily. This is also true for many cities on the eastern coast.

What does differ is consumer behaviour and market maturity. There is great variety even within Tiers. Our China Research Director was told the following analogy: if Chengdu is considered three to five years behind Shanghai, then Chongqing is three to five years behind Chengdu. We investigated whether or not this old adage was true and delved into research to ascertain just how many differences there could be between these two Tier 2 cities.

The distance between Chengdu and Chongqing, two traditionally big cities in China’s south west, can be overcome with a speedy 2-hour train journey. Yet the cultural, economic and behavioural differences in these two markets could not be more distinct. Indeed, many aspects of Chengdu’s wine industry are technically more advanced than those of Chongqing, which appears immature and opportunistic in comparison.

According to the Wine Intelligence Portraits segmentation, Chengdu consumers are more likely to be considered Adventurous Connoisseurs (10%) , whereas Chongqing has a much lower proportion (1%). Instead, the majority of Chongqing consumers are labelled as Frugal Occasionals (22%): low-engagement, price-sensitive consumers who drink wine occasionally, usually for special celebrations. Wine is not considered an especially important aspect of their lifestyle, so their low involvement and lower confidence when speaking of wine or making purchasing decisions is to be expected.

In contrast, imported wine drinkers in Chengdu have a notably stronger interest in wine (92%). They tend to be more frequent wine drinkers than Chongqing consumers with most (65%) drinking at least monthly. They also possess higher grade wine knowledge and a broader beverage repertoire. They have moved beyond red wine and traditional wine regions to Californian wines (34%) and are drinking more rosé (46%), Champagne (64%), and sparkling wines from the New World (33%). Meanwhile, their Chongqing neighbours still

prefer to stick to what they know (51%), drinking mostly red wine (95%).

For all their differences, there is perhaps one similarity that the Chengdu and Chongqing markets share: the dissatisfaction consumers have with retailers and their salespeople. Rather than representing a guiding hand when it comes to purchasing wine, shop staff are often distrusted. In fact, 17% of Chengdu consumers find it difficult to trust recommendations by shop staff and 12% of Chongqing consumers say that the staff being unknowledgeable about wine is the biggest barrier to buying imported wine (both percentages are the highest among

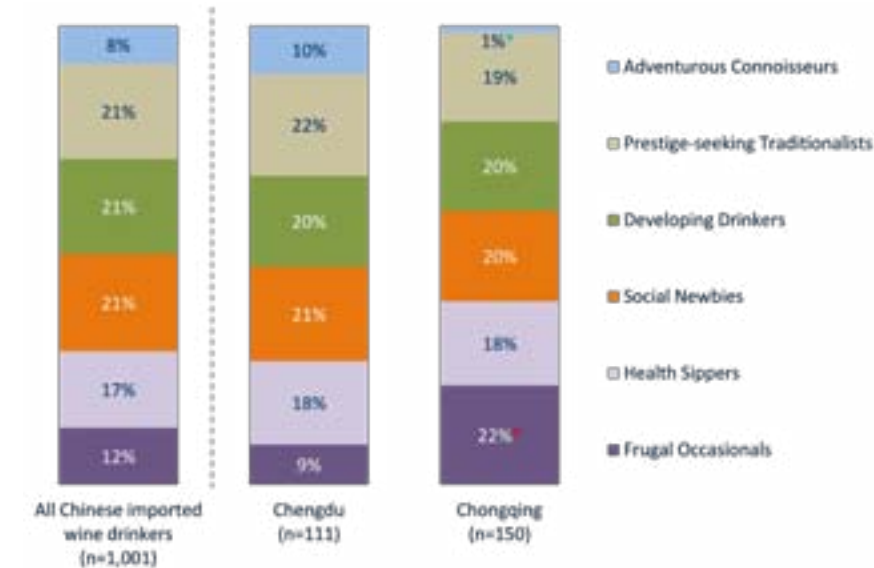
all the cities we surveyed). Ideally, shop staff are supposed to be well-versed in their products, if not because of their interest in the industry then at least in order to bump up sales.

Poor customer service can be detrimental and off-putting for consumers who are inexperienced and intimidated by wine. Good service is especially critical for brick-and-mortar stores in Chongqing, because over half of its consumers still purchase from specialised wine/alcohol shops (59%) and are less likely to order from the internet (29%) than consumers in other cities.

Despite its evident underdevelopment, the possibility to grow and to shape retail spaces and consumer behaviour in China’s lower Tier cities is exciting, and unprecedented in recent wine industry history. The industry’s immaturity in cities like Chengdu or Chongqing provides opportunities for both local and foreign companies to capture a brand new demographic that is increasing in number and disposable income. Given the discrepancies within some Tiered cities, there’s no fool-proof guidebook for market growth, nor can these cities simply replicate the models of Beijing or Shanghai. Yet, it is because of these challenges and the uncharted prospects in Tier 2, Tier 3, and even Tier 4 cities that entices those in the trade to invest beyond the more established, safer – and perhaps saturated - Chinese markets. ■

For further information about our work in China, contact our Research Director, Chuan, at chuan@wineintelligence.com or visit www.wineintelligence.com

Portrait breakdown in Chengdu and Chongqing



* statistically significantly higher/lower than Chinese 18-54 year-old urban upper-middle class drinkers of imported wine at a 95% confidence level
Source: Wine Intelligence Vinitrac® China, October 2016

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China Landscapes 2017	Q2 2017
Hong Kong Landscapes 2017	Q3 2017

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Multi-market

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Canada Portraits 2017	Q4 2017
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- Annalize de Klerk,
Research & Insight Manager, KWV



Much to the surprise of staunch traditionalists in the UK wine trade, fruit flavoured wines are becoming an ever more common presence in British supermarket aisles. Like ivy, their fluorescent greens, yellows and reds are – for better or worse – creeping inexorably over the shelves, and their (typically) sweeter and more aromatic flavours changing the consumer definition of what wine tastes like.

As those whose fingers were burned in the 5.5% ABV category, presence on shelf can have a number of drivers, not all of them based on consumer demand. So is there a need for fruit-flavoured wines? Who drinks these products? Are drinkers the archetypal young millennial, new to the wine category, dipping their toes via a flavour-packed and distinctly sweet product that has more in common with flavoured ciders than traditional claret? Or are they seasoned drinkers, grown tired of traditional grape wine and looking for an unconventional, reinvigorated style of wine?

These are questions we sought to answer in a recent Wine Intelligence Vinitrac® survey. It turns out that, contrary to conventional wisdom, a lot of the buyers of the fruit-flavoured category are already committed wine drinkers. Those who say they drink fruit-flavoured wines account for 19% of UK alcohol drinkers and are comprised overwhelmingly of regular wine drinkers (88%) – that is, traditional red, white or rosé wine drinkers. Those who intend to buy

fruit-flavoured wines but do not currently do so account for a further 14% of the alcohol-drinking population. Of these, 81% are wine drinkers. So, no sign (yet) that the fruit-flavoured category is attracting new-to-wine people.

Why are seasoned wine consumers migrating into fruit-flavoured? The most common prompted associations for fruit flavoured wines were that they are “easy to drink” (53%), “sweet” (49%) and “refreshing” (49%). When we examine unprompted associations, “refreshing” and “different” top the list – implying that they are perceived as a breath of fresh air compared to the stereotypical stuffiness and pretention of the wine. Interestingly, respondents also regard them as “summery”, suggesting a strong seasonal bias.

This leaning towards summer-time drinking is corroborated by the occasions for which respondents consider fruit flavoured wines appropriate. The number one occasion is “for picnics/ outdoor events” (43%). In second place is as “a relaxing drink at the end of the day at home” (35%), and in third as “a relaxing drink out at the end of the day” (33%).

When it comes to acceptable price range, we compared what consumers feel is an appropriate amount for fruit-flavoured wines to their budget for premium and non-premium traditional wines. “Too cheap” for fruit-flavoured wines was deemed £4 and below, with the optimum range being between £4-£6. Fruit flavoured wines over £6 were considered too expensive.

This result was mirrored closely by both non-premium and premium traditional wines, for which the optimum price range was considered to be £4-£6.50 and £4.50-£8, respectively. This suggests, on the whole, that consumers are not buying fruit-flavoured wines primarily on cost grounds – their expected price ranges are similar, with a ceiling of about £6 a bottle on fruit-flavoured.



With such a vast array of fruit flavours for the picking, which combinations delight and which disappoint? We found there was a clear divide between the sexes as well as the generations. In general, female drinkers are more aware of fruit-flavoured wine (59% of women compared to 54% of men), which is why it is no surprise they have purchased such wines in the past three months more than men (35% vs. 28%). Females, on the whole, preferred the idea of flavoured white wines significantly more than males. They showed a strong preference for peach (50% of women compared to 34% of men), mango (47% vs. 31%) and passionfruit (42% vs. 26%). With rosé, the story was similar: females opted for strawberry, raspberry and mixed berry flavours. In the case of red wines, our results were more balanced and we found no statistical differences between male and female preferences. Here, blackcurrant, chocolate and liquorice flavours consistently topped the list.

As far as age is concerned, it seems that fruity flavoured wines are the preserve of younger generations. Those aged 55 and over largely shun the concept; in our research, they were more likely to find any of the flavours we tested unappealing. On the other hand, those aged 18-34 were significantly less likely to reject any of the flavours.

So what were the least appealing flavours tested? The wooden spoon goes to tea infusion, which 75% of respondents would reject in red, white and rosé wines, followed by smoke (74%), and then banana (73%).

One or two duds aside, and whether the traditionalists like it or not, it seems that fruit-flavoured wines could well become a longstanding hallmark of the wine aisle. Driven by a predominantly female and – crucially – younger demographic, the resistance they encounter among older drinkers should not pose an existential threat. What's more, as they are considered primarily as a refreshing, outdoorsy, summertime drink, brands would do well to seasonalise their offer and capitalise on the public's sun-drenched thirst for the fruity. ■

For more information about our Fruit Flavours supplement, please visit www.wineintelligence.com

FRUIT FLAVOURED STATS

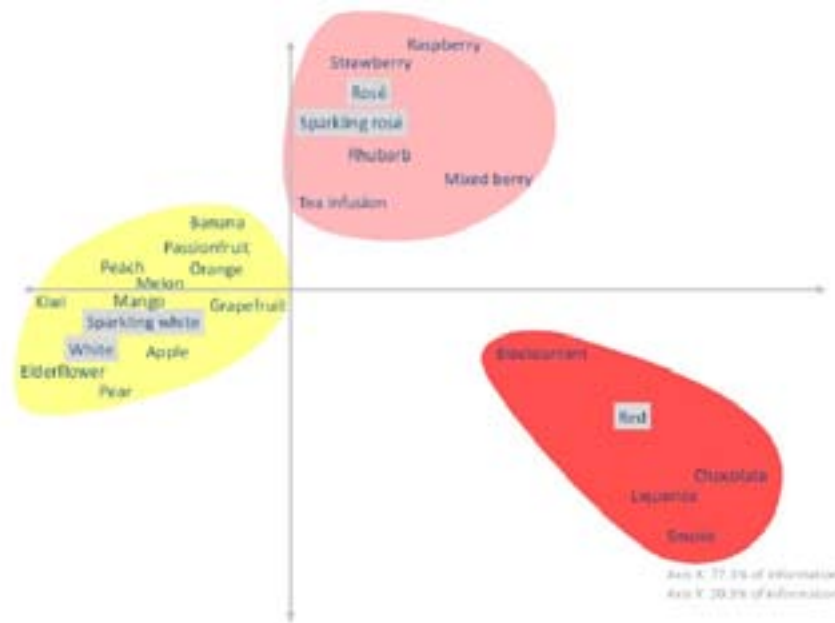
Unprompted association

% who used the following types of adjectives to describe fruit-flavoured wine
Base = All those aware of fruit-flavoured wines (n=615)



Desired flavour combinations by type of wine

Base = All those aware of fruit-flavoured wines (n=615)



The van Westendorp Price Sensitivity Meter



Source: Wine Intelligence UK Landscapes 2016 Report



How wine labels influence Australian wine drinkers and what motivates them to purchase

We're often told not to judge a book by its cover. As consumers, we like to downplay the importance of a label on our wine choice, and, if asked, say that there are a number of choice cues that are more influential than labelling when deciding which wine to buy, such as varietal, brand awareness, and peer recommendations. Even with this inherent bias against admitting we are swayed by packaging, the proportion of regular Australian wine drinkers indicating the bottle or label design is important when choosing a wine to buy has increased in the long term (from 29% in 2012 to 39% in 2016), and as marketers, we know getting a wine label right is more important than ever

for a successful sales performance. Furthermore, our Vinitrac® research shows that the appeal of the bottle and/or label design is significantly more influential amongst regular wine drinkers under the age of 35, with the proportion of those indicating label design is important jumping to 56% (compared with 39% or regular wine drinkers). After this age, the importance of the label gradually decreases, correlating with the increasing experience within the category. With the ever-growing number of SKUs competing within similar price brackets, standing out beyond intrinsic product attributes is more crucial than ever.

When our 2014 Australian Labels report was published, the aim was to identify which types of wine labels appeal most and why. It set a precedent for understanding different types of wine label design in the Australian market, and how different types of consumers engage with them. The result was an analysis of nine easy-to-understand categories, with each category representing labels that have elements which consumers recognise as being similar to each other.

What did we do?

A few years on, we wanted to see if (and in what way) Australian consumer perceptions and attitudes have changed. Whilst using the same categories as 2014 would have allowed for a direct comparison of the results, we needed to find out if the categories were still indicative of the current Australian wine label landscape. Therefore we conducted qualitative research and asked regular wine drinkers to sort a large number of current wine labels into categories they deemed to have similarities. We asked them to explain what the similarities were and didn't specify how many categories there should be; finally, we asked consumers to give these categories descriptive names.

What we discovered was that the more traditional label categories of 'Prestigious', 'Classic' and 'Vineyard Stately' from our 2014 study, were still valid and available in the marketplace. However, the more contemporary categories had shifted, with a growing number of producers becoming more adventurous with their design choices.



Therefore, we once again worked with Amphora – wine label design specialists – to develop a label to be illustrative of each of the label categories. These nine labels were then tested in our online Vinitrac® survey with over 1,000 Australian regular wine drinkers, to measure attractiveness, quality, price perceptions, likelihood to buy and imagery associations for each category.

What did we find?

In terms of straightforward ‘stand-out’ labels, Australian regular wine drinkers feel that two labels stand out from the pack; ‘Prestigious’ leads for this measure, closely followed by ‘Cartoon Retro’. Interestingly, these two labels are drawn from opposite ends of the spectrum in terms of design elements. However, a label standing out doesn’t necessarily convert to likelihood to buy, with ‘Cartoon Retro’ showing the weakest performance for this measure. It is also deemed to be the lowest for perceived quality and price expectation too.

So, what can be taken away from the report? Australian wine consumers still tend to expect higher quality from the more traditional labels, with ‘Prestigious’ again leading for quality, price expectation and likelihood to buy measures. However, younger consumers and more adventurous Portrait segments are more open to a broader range of labels. Younger consumers are more likely to find labels such as ‘Cartoon Retro’ and ‘Simple Contemporary’ attractive than other groups; however a large proportion are still going to choose the more traditional labels over these.

Understanding that these consumers are more embracing of non-traditional wine labels is important, but there should also

be a consideration of the reassurance cues present on the label that help these groups feel comfortable with their wine choice. ■

Adventurous Explorers and Contented Casuals have increased in size since 2014

Mainstream Value Seekers and Senior Sippers have decreased in size since 2014

Source: Wine Intelligence Australia Label Design 2017 Report

In brief: label categories explained

Bold Text: Strong coloured text-led labels with minimal graphics & often with subtle humour

Boutique: Artisanal elements with an essence of being hand-crafted and often more ‘European’ in styling

Cartoon Retro: Strong, bold, bright, colours with comic book-style graphics and humorous name

Classic: Simple, clean labels with dark text on white/cream backgrounds, limited use of text and serif font to maintain classic feel

Prestigious: Traditional labels, strong use of black & gold, font dominated and imagery typically

confined to heraldry, wine estate or vineyard illustrations

Simple Contemporary: Distinctive, uncluttered and often themed around non-traditional wine name and imagery

Simple Elegance: Clean labels with significant white space, often with single, clear image representing unique brand name and story with minimal text

Vineyard Stately: Detail-oriented labels, with strong use of vineyard & wine estate imagery and limited colour palettes

Vintage: Distinctive vintage styling, imagery and typography, often with distinctive brand name

BEHIND THE SCENES

Wine Intelligence Country Manager (Australia and New Zealand) Liz Lee talks about upcoming projects, Australian label design and the state of the Australian market

What’s your background, before you joined Wine Intelligence?

I did a double degree in Public Relations and Business, majoring in marketing at university before landing a graduate job in research. I was a high school teacher for a while, moving around Australia. When I moved back to Sydney I wanted to get back into research and I came across Wine Intelligence.

What have you learnt about wine now that you’ve spent some time working in the industry?

I guess there’s 2 main areas – doing the WSET level 2 certificate really helped me to understand how the Old World wine classifications worked. As the Australian market is quite varietal- and brand-led, navigating a French wine list would have been very overwhelming 12 months ago.

“Labelling has really changed a lot in the last few years; it’s important to find that balance of keeping traditional cues so that they are reassuring...”

The other side is just how complex the wine industry is – it’s truly a global market with a lot of competing brands and producers the world over.

What are your Australian clients looking for at the moment?

It varies from brand to brand and region to region, but Australian wine producers are trying to distance themselves from bulk wine production and position themselves into the premium, high-end sector of the market instead. In order to do that, they need to push the concepts of regionality and provenance. Educating consumers to understand which grapes grow best in which Aussie regions is challenging but will pay dividends when people start trading up for higher margin, premium Australian wines.

Clients are also interested in export markets,

particularly China and the US. The US is growing; everyone wants a slice of that pie. China is changing so quickly and people want to make sure they’re up-to-date with what’s happening – that’s where we come in.

One of your latest projects has been the Australian Label report. What did you learn?

Labelling has really changed a lot in the last few years; it’s important to find that balance of keeping traditional cues so that they are reassuring, but also of having a bit of standout appeal without going too over the top and looking like it’s not really a serious wine.

With this report, we gave examples of different labels that are available on the Australian market to consumers and asked them to group them based on similarities they saw. We tested them quantitatively in terms of: Which label would you be most likely to buy? Which do you think is the

highest quality or which do you think is the most attractive? I think having the

2 pronged approach of both qualitative and quantitative research will be really

interesting for seeing the insights, especially as to how different age group and Portraits segmentations respond to each category.

What are (if any) the key differences between wine labels for New World wines and Old World wines?

I guess in my experience as an Australian, if you walk into a store it’s still very dominated by Australian and NZ wine. When we do see international labels, they’re either very traditional looking – so French wines will have a château with a lovely picture of a vineyard, or they’ll go the other way. A lot of Spanish wines are currently trying to look quite contemporary in Australia, but again it’s such a small proportion.

If Old World wines are using a traditional label and don’t have the grape varietal anywhere, the average Australian consumer won’t know what they’re buying. If Old World producers want to play a bigger role on the Australian stage then they probably need to focus on educating Australians, using what they already know as a framework to add new information onto. For example, they could compare unusual varietals to a well-known Australian varietal so that they have a bit of a flavour comparison. But if all they see is a region and a brand name they don’t recognise, they’re going in a bit blind. For



some consumers, that's the fun part of wine – they like trying something new. Nevertheless, it helps having a few reassurance cues, even if it's just the back label explaining the flavour profile.

What has the Australian office been working on for the past 12 months?

We've released quite a few reports – Australia Landscapes, Australian Sparkling and our Australia Portraits report, in which a couple of the segments had a name change, to reflect the changes we'd seen. For the upcoming year, we'll publish our Australia Labels report and we're also having a look at potentially doing something about lower alcohol and different sizes and formats.

Other projects include our Trends Workshop coming up in late February, which are always well attended. We'll be joined by Lulie Halstead, our CEO. We normally tend to have other workshops running in October as well – but the programme for those is yet to be confirmed.

What's your favourite wine choice?

Whites are so interesting - I've really fallen in love with Riesling as it's so diverse. I think everyone could find a Riesling they liked. But there's a big misconception out there that Riesling is sweet so I've made it my mission in life to educate everyone I meet that it doesn't have to be!

I tried a few red wines when I was first at uni, but I had a reaction to it, so didn't drink it for about 5-6 years. It wasn't until I started at Wine Intelligence that I noticed that my knowledge of wine was quite lopsided – I knew about white but nothing about red. So like any good Australian, I started with some Shiraz and now I love Tempranillo and Rioja. I'd say my palette is developing and if I had to pick one for the rest of my life, I'd probably pick red. But it's a tough choice...a bit like picking your favourite child! ■

For more information about our Australian reports such as Australia Portraits 2016, Australia Landscapes 2016 and Australian Label Design 2017, please visit www.wineintelligence.com

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