WINE INTELLIGENCE

# WINE LABEL DESIGN IN THE US MARKET

APRIL 2021

REPORT BROCHURE

# PRICING

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# INTRODUCTION

When asked about their archetypal consumer, many wine brand owners' default to a similar answer: an educated, high earning, well-respected, aesthetically sophisticated, thoughtful, adventurous, enlightened consumer. In other words, a sort of idealized version of themselves. And it is true that such consumers do exist, and some niche businesses have made a success of selling to people who look, sound and act a bit like the owners of those businesses.

However, for most wine brands, and especially those operating at scale, the customer-as-version-of-producer archetype tends to break down. The reality is that consumers of wine in any market are a broad church, with some common characteristics but a lot of differences too. In most markets, the reality is also that these consumers tend not to be quite as sophisticated as the brand owner thinks they ought to be. These consumers are not dumb, but by their nature they don't have as much confidence in a wine as the person who made it, and need reassurance and comfort as well as excitement and intrigue. This is a problem, because many wine labels are commissioned to reflect the aesthetic vision of the brand owner – more intrigue, less comfort - and therefore fail in a market where consumers have different values and needs.

The US market is the world's largest market for wine, and also the most valuable, with the largest sales of premium wine (retailing for over USD 15 or equivalent) in the world. As such, it is also one of the most competitive environments for wine sales on the planet, and one where every lever at the disposal of a wine producer – awards won, high points scores from influential critics, good distribution, and standout packaging – needs to be deployed for the product to have any chance of success.

While awards and points are well understood catalysts for boosting consumer motivations to buy, there is less clarity on the impact of the label. In part this is because design value is harder to quantify than a 95-point score from a leading critic; it also reflects this aforementioned broad church of consumer needs. Some consumers require more reassurance and traditional cues; others feel more comfortable with bolder design statements.

The evidence presented in this report is not meant to provide a definitive answer as to what label your wine should have. Instead, it should be seen as a body of evidence about how label archetypes interact with consumer typologies, to help untangle the challenges of building a product that looks and feels right for your target consumer. In the end, the brand owner's vision as manifested by a skilled designer should triumph. But it should come from a position of knowing the consumer you are ultimately designing for, and why.

# WINE INTELLIGENCE WINE LABEL CATEGORIES IN THE US MARKET

Wine Intelligence has classified wine labels in the US market into the following categories, and used the label archetypes shown to research consumer attitudes


**Prestige**


**Stately Classic**


**Classic Text**


**Simple Bold**


**Elegant**

**Modern Graphic**


**Artisan / Vintage**

# WINE INTELLIGENCE WINE LABEL CATEGORIES IN THE US MARKET

Wine label category archetypes continued:


**Boutique**


**Distinctive**


**Bold Text**


**Surrealist**


**People**


**Simple Contemporary**


**Bright**

# RESEARCH QUESTIONS ASKED

| | Questions asked in the Wine Intelligence Vinitrac® in Vinitrac US, January 2021 among 2,000 US regular wine drinkers* (drink wine at least once per month) |
|---|---|
| 1 | **Appeal**<br>How appealing do you find the following wines on a scale from 1 to 5, where 1 = "Very unappealing" and 5 = "Very appealing"? |
| 2 | **Intent to purchase**<br>How likely would you be to buy each of these wines if they were available where you usually buy wine at a price suitable to you? Please answer on a scale from 1 to 5 where 1 = "Very unlikely" and 5= "Very likely" |
| 3 | **Price expectations**<br>How much would you expect each of these bottles of wine to cost at the store where you typically buy wine? |
| 4 | **Quality expectations**<br>What would you expect the quality of each of these wines to be? |
| 5 | **Imagery**<br>Below you will see a list of statements and words that could be used to describe each wine. Please indicate which words or statements below you think are the most appropriate to describe each bottle |

***Note: Red and white wine label designs were tested separately with representative samples of US regular wine drinkers. Label designs were also shown in a randomized, rotating order to avoid response bias**

Source: Wine Intelligence, Vinitrac® US, January 2021 (n=2,000), US regular wine drinkers

# EXAMPLE SLIDE: KEY FINDINGS: RED LABEL DESIGNS PERFORMANCE (1/2)

Ranking based on net intent to purchase


Prestige · Stately Classic · Elegant · Bright · Distinctive · People · Boutique

| | Prestige | | Stately Classic | | Elegant | | Bright | | Distinctive | | People | | Boutique | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Rank | Net score | Rank | Net score | Rank | Net score | Rank | Net score | Rank | Net score | Rank | Net score | Rank | Net score |
| **Net intent to purchase** | 1st | 55 | 2nd | 49 | 3rd | 46 | 4th | 43 | 5th | 40 | 6th | 39 | 7th | 38 |
| **Net label appeal** | 1st | 71 | 2nd | 66 | =3rd | 65 | 5th | 64 | =3rd | 65 | =6th | 56 | =6th | 56 |
| **Net quality expectation** | 1st | 74 | 2nd | 60 | 3th | 51 | =5th | 48 | 6th | 43 | 3rd | 52 | =8th | 42 |
| **Price expectation** | 1st | $16.96 | 2nd | $16.14 | 5th | $15.59 | 7th | $15.47 | 8th | $15.29 | 3rd | $15.82 | 9th | $15.24 |

Source: Wine Intelligence, Vinitrac® US, January 2021 (n=2,000), US regular wine drinkers

# EXAMPLE SLIDE: KEY FINDINGS: PRESTIGE LABEL PERFORMANCE

wine intelligence

## Dominant characteristics:

- **Color:** Heavy use of metallic colors, particularly gold, on a black background
- **Rendering:** Occasional use of line drawings (non-photorealistic rendering)
- **Image:** If used, crests, logo, heraldry
- **Typography:** Mostly Serif fonts and upper case lettering coupled with cursive styles
- **Text:** Clear winery and / or brand name with focus on varietal, region and vintage

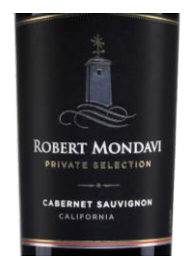

| Red | Intent to purchase | Label appeal | Quality expectation | Price expectation |
|---|---|---|---|---|
| Net score | 55 | 71 | 74 | $16.96 |
| Rank | 1st | 1st | 1st | 1st |

| White | Intent to purchase | Label appeal | Quality expectation | Price expectation |
|---|---|---|---|---|
| Net score | 36 | 54 | 62 | $15.92 |
| Rank | =2nd | 4th | 1st | 1st |

| Key associations (Red) | |
|---|---|
| Sophisticated | 27% |
| Elegant | 27% |
| Traditional | 24% |

| Key associations (White) | |
|---|---|
| Traditional | 25% |
| Good for special occasions | 23% |
| Elegant | 21% |

### Example brands






Ranking based on intent to purchase
Source: Wine Intelligence, Vinitrac® US, January 2021 (n=2,000), US regular wine drinkers

# EXAMPLE SLIDE: LABEL PERFORMANCE AMONG MEN: WHITE WINES

Similar to red wine labels, male consumers are more conservative when it comes to the appeal of white wine labels, preferring traditional designs

## Net label appeal, intent to purchase and quality expectation: White label designs

Base = All US regular wine drinkers (n=2,000)

| Net label appeal | | | |
|---|---|---|---|
| Rank 2021 | | All US regular wine drinkers | Male |
| | *n=* | *2,000* | *860* |
| 1 | Elegant | 62 | 63 |
| 2= | Boutique | 58 | 48 |
| 2= | Bright | 58 | 51 |
| 4 | Prestige | 54 | 57 |
| 5 | Stately Classic | 52 | 57 |
| 6 | Artisan / Vintage | 47 | 51 |
| 7 | Distinctive | 44 | 49 |
| 8= | Classic Text | 35 | 49 |
| 8= | Modern Graphic | 35 | 39 |
| 10 | People | 34 | 45 |
| 11 | Simple Bold | 24 | 39 |
| 12 | Simple Contemporary | 19 | 25 |
| 13 | Surrealist | 16 | 32 |
| 14 | Bold Text | 3 | 21 |

| Net intent to purchase | | | |
|---|---|---|---|
| Rank 2021 | | All US regular wine drinkers | Male |
| | *n=* | *2,000* | *860* |
| 1 | Stately Classic | 38 | 46 |
| 2= | Elegant | 36 | 41 |
| 2= | Prestige | 36 | 46 |
| 4= | Bright | 32 | 31 |
| 4= | Boutique | 32 | 31 |
| 6 | Classic Text | 25 | 40 |
| 7 | Modern Graphic | 23 | 35 |
| 8= | Artisan / Vintage | 22 | 36 |
| 8= | Distinctive | 22 | 33 |
| 10 | People | 12 | 25 |
| 11 | Simple Bold | 9 | 28 |
| 12 | Simple Contemporary | 4 | 24 |
| 13 | Surrealist | -4 | 21 |
| 14 | Bold Text | -9 | 11 |

| Net quality expectation | | | |
|---|---|---|---|
| Rank 2021 | | All US regular wine drinkers | Male |
| | *n=* | *2,000* | *860* |
| 1 | Prestige | 62 | 62 |
| 2 | Stately Classic | 58 | 61 |
| 3= | Artisan / Vintage | 46 | 50 |
| 3= | Elegant | 46 | 48 |
| 5 | Classic Text | 45 | 52 |
| 6 | Boutique | 44 | 45 |
| 7 | Bright | 42 | 44 |
| 8 | Modern Graphic | 39 | 44 |
| 9 | People | 37 | 43 |
| 10 | Distinctive | 35 | 45 |
| 11 | Simple Bold | 29 | 38 |
| 12= | Surrealist | 20 | 34 |
| 12= | Bold Text | 20 | 35 |
| 14 | Simple Contemporary | 19 | 33 |

**Top 3:**

**1st** Elegant


**=2nd** Prestige


**=2nd** Stately Classic


**Top 3:**

**=1st** Prestige


**=1st** Stately Classic


**3rd** Elegant


**Top 3:**

**1st** Prestige


**2nd** Stately Classic


**3rd** Classic Text


Source: Wine Intelligence, Vinitrac® US, January 2021 (n=2,000), US regular wine drinkers

# RESEARCH METHODOLOGY: QUANTITATIVE

The data for this report was collected in the US in January 2021

Data was gathered via Wine Intelligence's Vinitrac® online survey

Respondents were screened to ensure that they were at least 21 years old; drank red, white, rosé or blush wine at least once a month; and bought wine in the off-premise or in the on-premise

Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

The data is representative of US regular wine drinkers in terms of gender, age, US Divisions and, annual pre-tax household income

The distribution of the sample is shown in the table:

| | | *Jan-21* |
|---|---|---|
| | *n=* | ***2,000*** |
| **Gender** | Male | 43% |
| | Female | 57% |
| | ***Total*** | ***100%*** |
| **Age** | 21-24 | 4% |
| | 25-34 | 14% |
| | 35-44 | 19% |
| | 45-54 | 16% |
| | 55-64 | 19% |
| | 65 and over | 28% |
| | ***Total*** | ***100%*** |
| **US Divisions** | New England | 6% |
| | Middle Atlantic | 17% |
| | East North Central | 13% |
| | West North Central | 7% |
| | South Atlantic | 20% |
| | East South Central | 6% |
| | West South Central | 11% |
| | Mountain | 6% |
| | Pacific | 15% |
| | ***Total*** | ***100%*** |
| **Annual household income before taxes** | Under $20,000 | 8% |
| | $20,000 - $29,999 | 6% |
| | $30,000 - $39,999 | 6% |
| | $40,000 - $49,999 | 8% |
| | $50,000 - $59,999 | 8% |
| | $60,000 - $99,999 | 23% |
| | $100,000 - $149,999 | 14% |
| | $150,000+ | 21% |
| | Prefer not to answer | 6% |
| | ***Total*** | ***100%*** |

Source: Wine Intelligence, Vinitrac® US, January 2021 (n=2,000), US regular wine drinkers

## Ready to purchase?

- Buy online
- Request an invoice by emailing enquiries@wineintelligence.com

## Need to know more?

- Email enquiries@wineintelligence.com with your question(s)

*Connecting wine businesses with knowledge and insights globally*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