wine
intelligence

A division of the IWSR Group

Global Compass 2022

Still wine and sparkling wine market attractiveness models

Contents

Pricing

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Methodology

Global Compass 2022

Methodology

Methodological changes in the new model

Overview

The Wine Intelligence Compass model is based on a combination of:

- **Quantitative data** measuring market attractiveness
- Wine Intelligence **qualitative judgements** based on industry knowledge and experience

First, we collected data on a number of variables combining **economic and wine market measures** to assess market attractiveness

For each measure, countries were given a score of 1-10 based on their performance

Each measure was assigned a weighting based on its importance

To test the reliability of the model, a factor analysis was run on the measures using a **Cronbach's Alpha test** resulting in a score of 0.73 suggesting a "good" level of association

This combined factor was used to **classify the markets into groups** (along with detailed market information) and rank the potential of the markets within each classification group

Data

Quantitative data for market attractiveness was collected on several measures to classify the wine markets

The data originated from two main groups:
- **Economic measures**: Used to assess the stability and future potential of the market as a whole
- **Wine market measures**: Used to identify the current and future potential for wine in the market

Data was collected from both secondary and primary Wine Intelligence sources. Wherever possible, a single source was used for each measure and a second source was only used in the absence of data

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Measures and sources

Economic measures

- Adult population size (15+); *United Nations*

- Population growth; *World Bank*

- Gross Domestic Product per capita, constant 2015 USD*;
  World Bank, National Statistics Republic of China

- Gross National Income per capita, Atlas Method, USD*;
  World Bank, National Statistics Republic of China

- Unemployment (% of total labour force);
  International Monetary Fund, National Statistics Republic of China

- Inflation (end of period consumer price);
  International Monetary Fund

- Corruption index; *Transparency International*

- Globalisation index; *KOF Swiss Economic Institute*

Wine market measures

- Market volume; *The IWSR*

- Imported wine market volume; *The IWSR*

- Per capita consumption; *The IWSR, Wine Intelligence*

- Market value; *The IWSR*

- Wine market profitability; *Wine Intelligence*
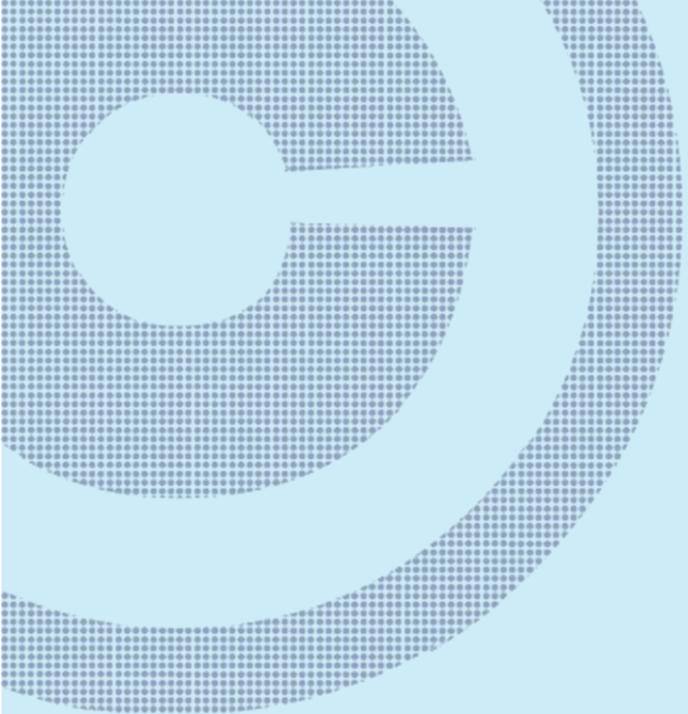
- Market accessibility; *Wine Intelligence*

*Although GDP and GNI are highly correlated, they each represent different methods of assessing a country's wealth. GDP is the total wealth generated within a country, whereas GNI also considers the net income received from overseas. Arguably, GNI is a better indicator of household disposable income

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Qualitative judgments

Additional Wine Intelligence data and knowledge accumulated over years of experience in the industry was used to support the classification of the markets into groups.

1. Calibration studies determining the percentage of total and regular wine drinkers within each market

2. Wine Intelligence Vinitrac® studies: Quantitative studies now running in over 30 countries across the globe, which have enabled us to collect the views of more than 100,000 respondents about wine over the past year

3. Focus groups, accompanied shopping and consumer interviews in various markets across most continents which bring an in-depth understanding of wine consumer attitudes and behaviours

4. Trade interviews offering insights directly from individual markets about the current status and future opportunities of the wine industry

5. Market visits, including store visits both on- and off- trade

6. Secondary sources

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