

# GERMANY LABEL DESIGN

March 2018 Report

wine  
intelligence

IN COOPERATION WITH



**Quantum X**  
Konzept × Strategie × Design

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# Introduction

## A question of style: label design preferences among German regular wine drinkers



First impressions are always important, and this is definitely true when it comes to wine labels. Consumer choice can be significantly influenced by what the label you put on your wine says about the type, quality and heritage of your product – and ultimately your whole brand equity. With this in mind, Wine Intelligence has, for the first time, carried out a study to investigate which label designs most appeal to the German wine consumer.

We began the study by partnering with a highly respected German marketing agency, Quantum X. We held focus groups in Munich, Cologne and Hamburg in order to identify 10 different archetypes of label designs which feature most prominently in the German wine market. Quantum X helped us design these 10 label designs, following the conventions of the archetype, which were then tested in a quantitative study using a representative sample of German regular wine drinkers. Respondents were asked a series of questions which helped us assess their perception of each of the label designs and ultimately find out which of the label designs appealed to them most.

The results show that German regular wine drinkers have a strong preference for label designs which are simple and prestigious while finding the more contemporary styled labels less appealing. Younger regular wine drinkers, being newcomers to the wine category, show an a greater openness to a broader range of labels and do not conform to designs typically seen as central to the category. However, those over the age of 60 typically find the more unconventional labels far less appealing than average.

This report is a useful guide for producers who want to gain a better understanding of their consumers' preferences when it comes to label designs. When designing a label, they must keep in mind their brand positioning and make that crucial decision between keeping it 'central' to the category or moving towards more contemporary styles.



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# Wine label categories in the German market

Our categorization recognizes 10 label types as proxies for the different schools of label design currently in the market



1. Prestigious



2. Klassik



3. Standard



4. Young Classic



5. Vibrant Classic



6. Contemporary



7. Simple Minimal



8. Artisan



9. Origin specific

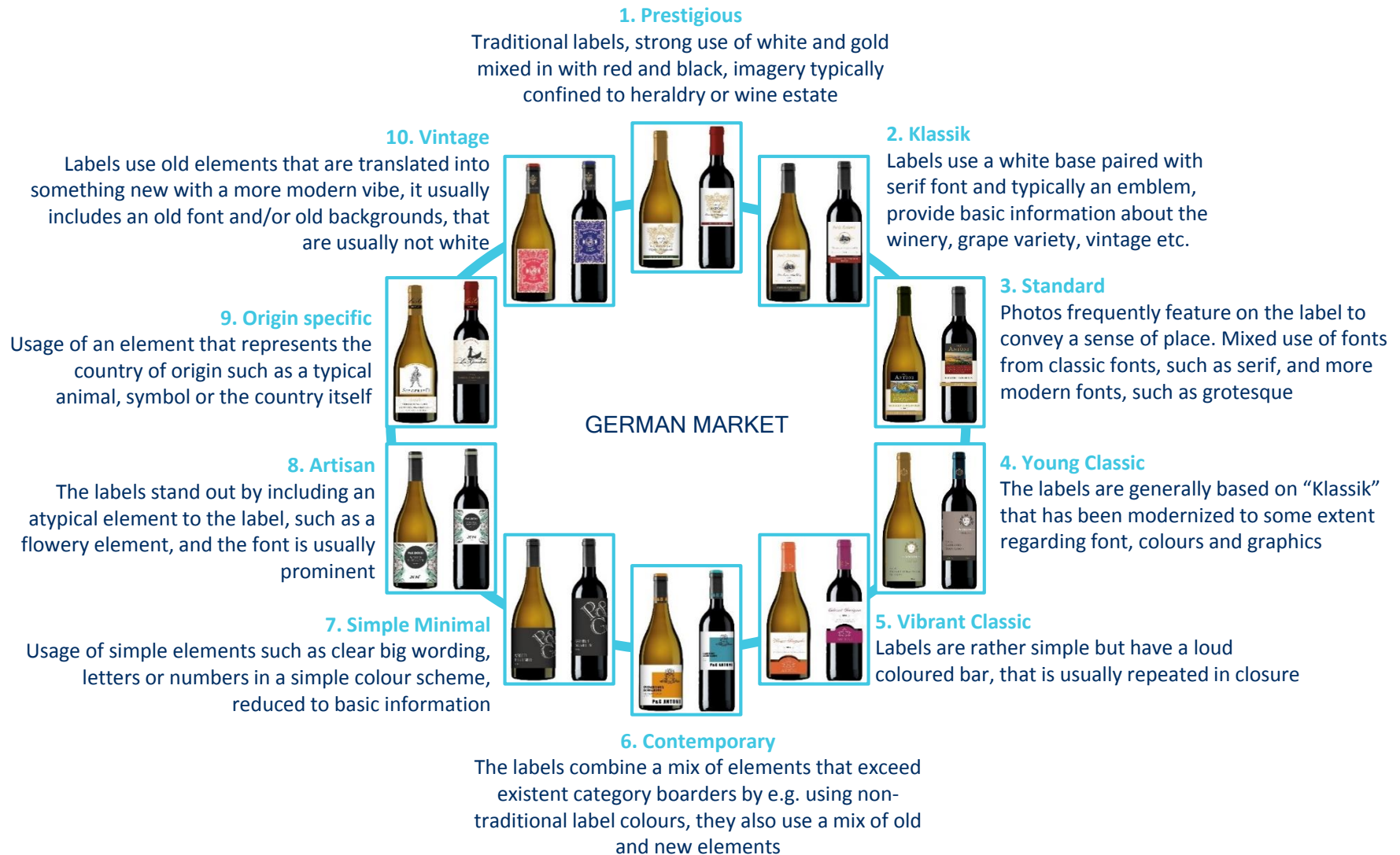


10. Vintage



# Wine label categories in the German market

## Overview of the 10 label types in the German market



# Summary of response to labels: Scorecard overview

Top 4 label types across all assessment variables are #1 Simple Minimal, #2 Prestigious, #3 Origin Specific and #4 Standard

	Label name	Stand-out	Attractiveness	Perceived quality	Price expectation	Likelihood to buy
<b>Most appreciated</b>  <b>Least appreciated</b>	<b>Top 4</b> Simple Minimal	1	2	1	3	1
	Prestigious	5	4	2	1	2
	Origin Specific	4	3	3	2	7
	Standard	2	1	6	6	5
<b>Next 3</b>	Young Classic	8	7	5	4	3
	Klassik	9	5	4	7	4
	Vibrant Classic	7	6	7	9	6
	Vintage	3	10	9	5	10
	Artisan	6	8	8	8	8
Contemporary	10	9	10	10	9	

= Top ranked for variable      = Lowest ranked for variable

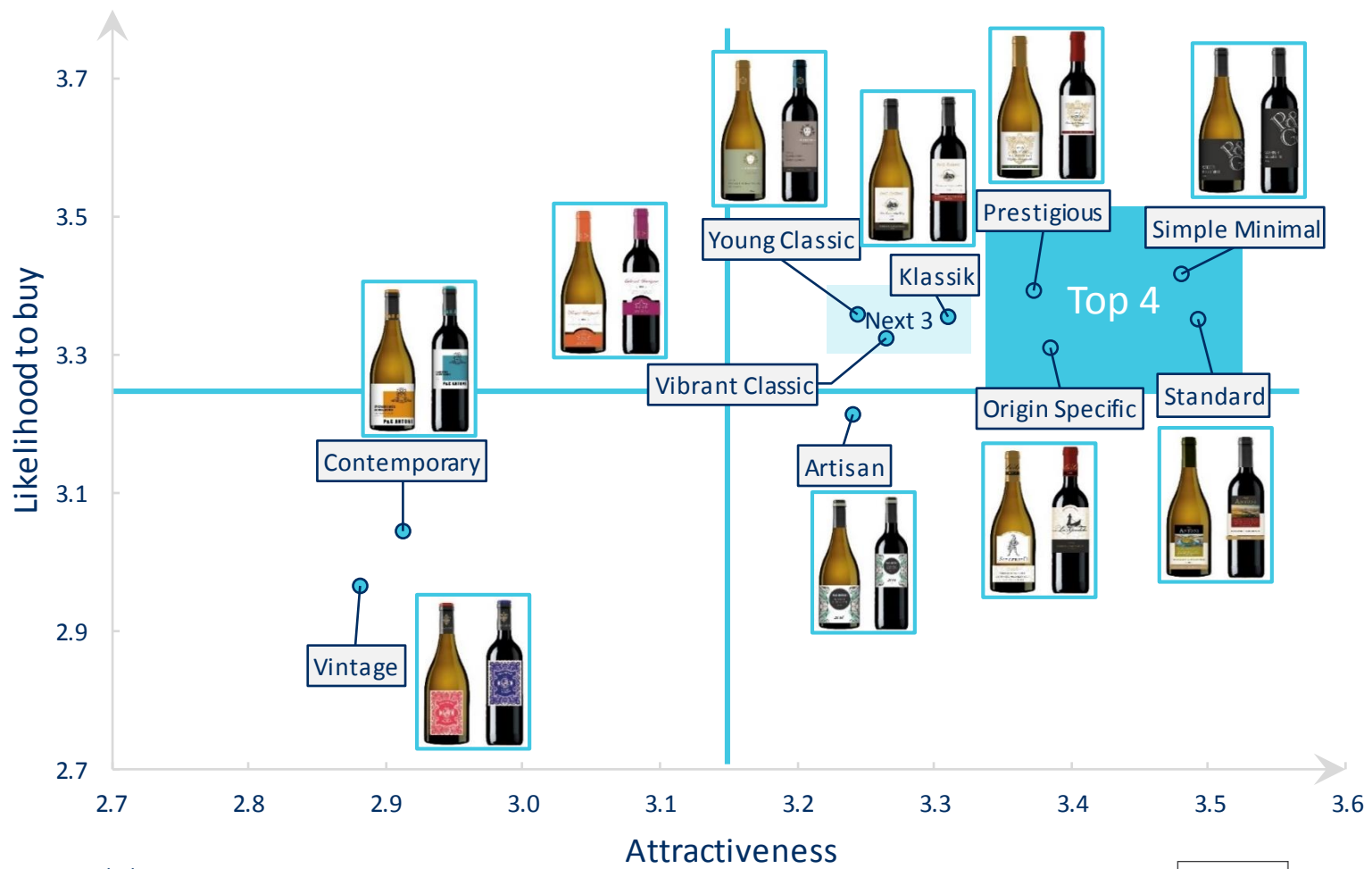


# Label likelihood to buy vs. attractiveness

Simple Minimal, Standard, Prestigious and Origin Specific perform well both in terms of attractiveness and likelihood to buy

## Label likelihood to buy vs. attractiveness

Analysis of mean likelihood to buy score and mean perception of attractiveness  
 Base = All German regular wine drinkers (n=1,000)



# Label likelihood to buy vs. attractiveness

Older consumers, who typically spend less, prefer the Standard label design while younger consumers, who typically spend more, prefer Simple Minimal

✓ = among the top 4  
 ✓✓ = highest scoring

## Top 4 label designs in likelihood to buy and attractiveness

	1. Prestigious	2. Klassik	3. Standard	4. Young Classic	5. Vibrant Classic	6. Contemporary	7. Simple Minimal	8. Artisan	9. Origin Specific	10. Vintage
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## Likelihood to buy and attractiveness: By age group

	1. Prestigious	2. Klassik	3. Standard	4. Young Classic	5. Vibrant Classic	6. Contemporary	7. Simple Minimal	8. Artisan	9. Origin Specific	10. Vintage
25 – 39 years	✓				✓		✓✓	✓		
40 – 59 years	✓		✓✓				✓		✓	
Older than 60 years	✓	✓	✓✓						✓	

## Likelihood to buy and attractiveness: By spend on a bottle of wine as a relaxing drink at the end of the day at home

	1. Prestigious	2. Klassik	3. Standard	4. Young Classic	5. Vibrant Classic	6. Contemporary	7. Simple Minimal	8. Artisan	9. Origin Specific	10. Vintage
Less than €4,99			✓✓				✓		✓	
€5,00 - €9,99	✓		✓				✓✓			
More than €10,00							✓✓	✓	✓	



# Imagery statements

The traditional label types, such as Klassik and Standard, are considered approachable and trustworthy, the more distinctive label types are associated with modern or stylish

## Imagery Statements

Top 3 selected statements that best applies to each label  
 Base = All German regular wine drinkers (n=1,000)

1. Prestigious	2. Klassik	3. Standard	4. Young Classic	5. Vibrant Classic
Modern	Approachable	Approachable	Approachable	Approachable
Stylish	Trustworthy	Trustworthy	Elegant	Ordinary
Elegant	Elegant	Authentic	Modern	Trustworthy

6. Contemporary	7. Simple Minimal	8. Artisan	9. Origin specific	10. Vintage
Modern	Modern	Modern	Approachable	Outdated
Boring	Stylish	Approachable	Elegant	Boring
Ordinary	Elegant	Stylish	Sophisticated	Approachable / Cheap

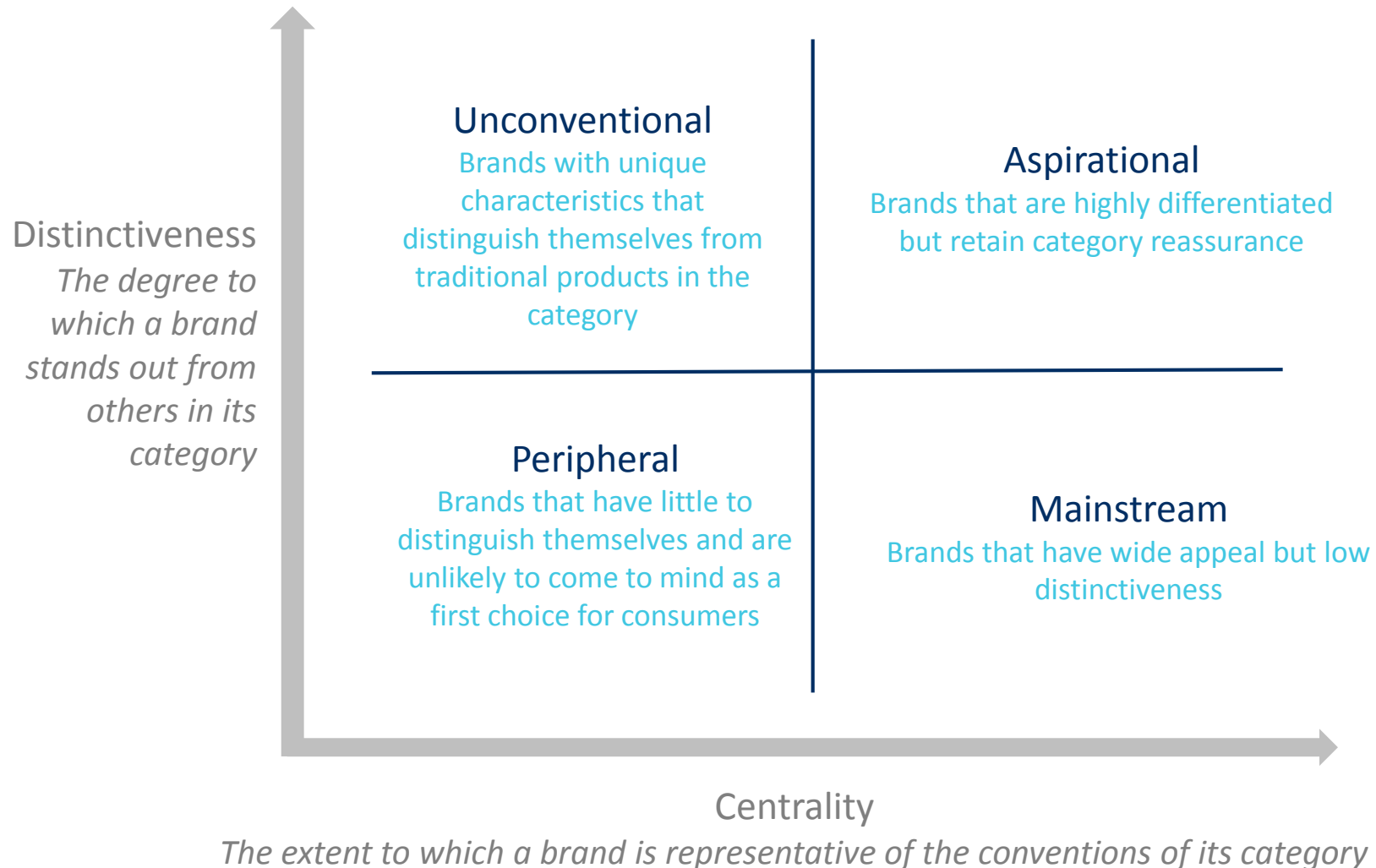


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# Brand positioning

Labels in the wine category need to strike a balance between centrality and distinctiveness



# Wine label categories in the German market

Plotting the 10 label types from distinctive to central

DISTINCTIVE

CENTRAL



Origin Specific



Young Classic



Prestigious



Vintage



Simple Minimal



Klassik



Contemporary



Artisan



Vibrant Classic

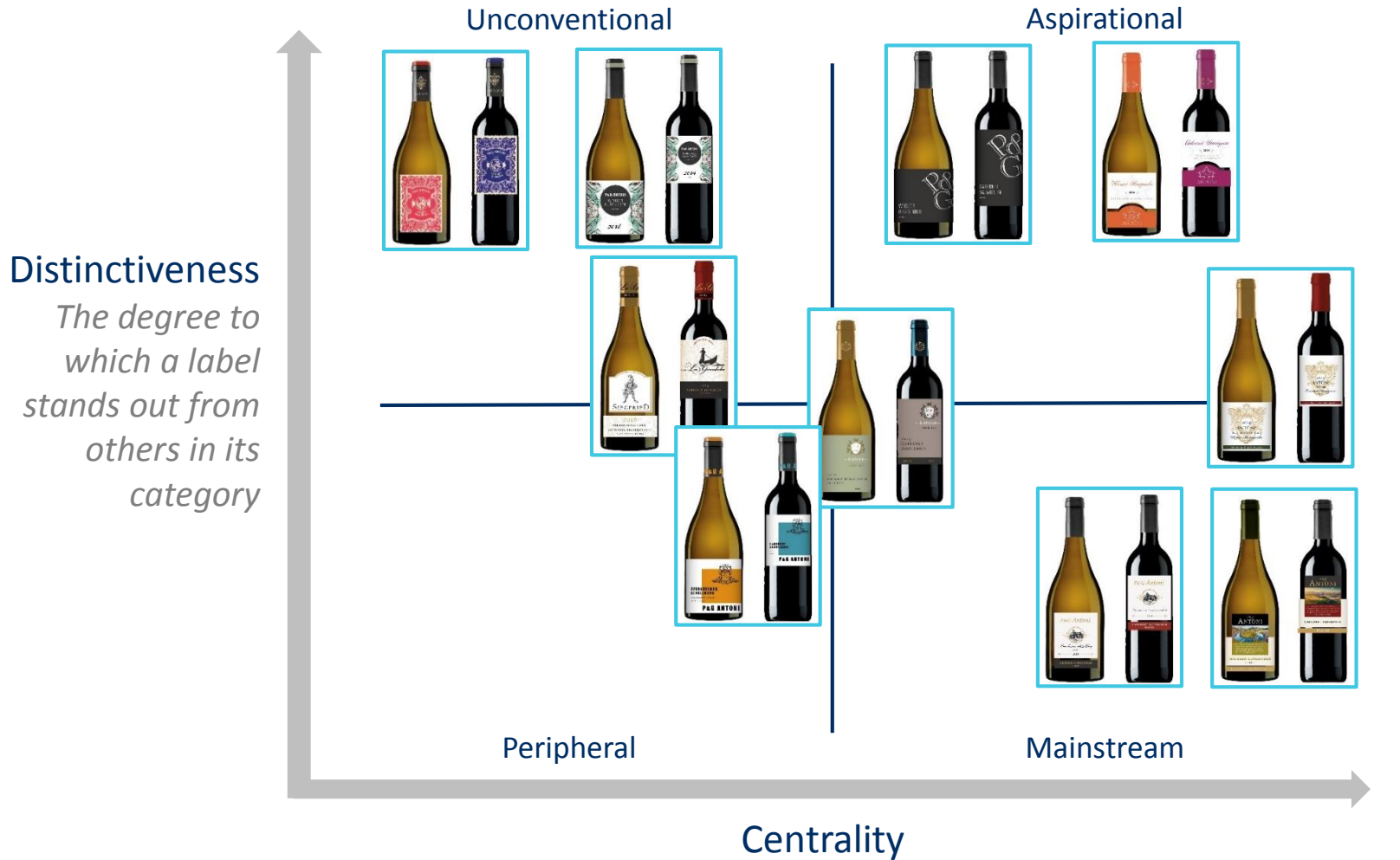


Standard



# Wine label categories in the German market

## Distinctiveness vs. centrality of label types in the German market



*The extent to which a label is representative of the conventions of its category*



# Introducing the label types

In the following slides we describe each category based on key design elements

The ten label categories are classified by the following influencers:

Classification influencer:	Exemplary group characteristic:
<b>Colour</b>	Combination of: <ul style="list-style-type: none"><li>▪ Colours themselves</li><li>▪ The number of colours used</li><li>▪ Proportion of colour used/label size</li></ul>
<b>Rendering</b>	How illustrations and symbols are displayed, e.g. line drawings / etchings / watercolours
<b>Image</b>	The type of symbols, pictures and illustrations used, e.g: <ul style="list-style-type: none"><li>▪ Cultural symbols</li><li>▪ National / regional symbols</li><li>▪ Symbolic inference</li></ul>
<b>Typography</b>	<ul style="list-style-type: none"><li>▪ Size of font used</li><li>▪ Font types</li><li>▪ Combination of font types</li><li>▪ Font colour used</li></ul>
<b>Text</b>	<ul style="list-style-type: none"><li>▪ Amount of text</li><li>▪ Position of text</li><li>▪ Meaning of words</li><li>▪ Language</li><li>▪ Names</li></ul>



# Introducing the label types

## Dominant characteristics for label type Prestigious

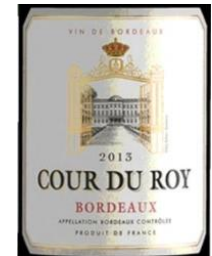
Prestigious	Klassik	Vibrant Classic	Standard	Young Classic	Simple Minimal	Artisan	Origin Specific	Vintage	Contemporary
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### Dominant characteristics:

- Traditional design elements such as wine estate or heraldry
- Often a combination of cursive and serif fonts
- Colours often associated with high-quality colours such as burgundy or black on a white label
- Elaborate finishes such as gold and / or silver foil

### Example brands



# Introducing the label types

## Dominant characteristics for label type Klassik

Prestigious

**Klassik**

Vibrant Classic

Standard

Young Classic

Simple  
Minimal

Artisan

Origin  
Specific

Vintage

Contemporary



### Dominant characteristics:

- Combination of cursive and serif fonts
- Classic-traditional colors such red and / or black on a white label
- Basic information such as brand / winery, grape variety, vintage etc.
- Moderate use of hot foil
- Traditional bottle shapes incl. Schlegel bottle (Germany)

### Example brands



# Introducing the label types

## Dominant characteristics for label type Vibrant Classic

Prestigious

Klassik

Vibrant Classic

Standard

Young Classic

Simple  
Minimal

Artisan

Origin  
Specific

Vintage

Contemporary



### Dominant characteristics:

- Striking colours often used in a bar shapes label and also capsule
- Main focus is often the brand name and grape variety
- A mix of traditional and modern fonts such as serif or grotesque

### Example brands



# Introducing the label types

## Dominant characteristics for label type Standard

Prestigious

Klassik

Vibrant Classic

Standard

Young Classic

Simple  
Minimal

Artisan

Origin  
Specific

Vintage

Contemporary



### Dominant characteristics:

- Photos frequently feature on the label to convey a sense of place
- Mixed use of fonts from classic fonts, such as serif, and more modern fonts, such as grotesque
- Accents of colour while the rest of the colours are quite muted
- Basic information such as brand / winery, grape variety, vintage etc.

### Example brands



# Introducing the label types

## Dominant characteristics for label type Young Classic

Prestigious

Klassik

Vibrant Classic

Standard

Young Classic

Simple  
Minimal

Artisan

Origin  
Specific

Vintage

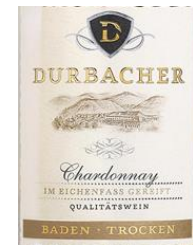
Contemporary



### Dominant characteristics:

- Labels are based on elements similar to the “Klassik” style, but are more modern to some extent
- Opaque colours, often used over a large area
- Combination of classic elements such as coats of arms with more contemporary typography and design touches

### Example brands



# Introducing the label types

## Dominant characteristics for label type Simple Minimal

Prestigious

Klassik

Vibrant Classic

Standard

Young Classic

Simple  
Minimal

Artisan

Origin  
Specific

Vintage

Contemporary



### Dominant characteristics:

- Focus on letters as the striking design element
- Letters are often large to draw focus on the brand name or grape variety
- Use of block colours (e.g. white-on-black) type
- Very limited amount of technical information about the wine

### Example brands



# Introducing the label types

## Dominant characteristics for label type Artisan

Prestigious

Klassik

Vibrant Classic

Standard

Young Classic

Simple  
Minimal

Artisan

Origin  
Specific

Vintage

Contemporary



### Dominant characteristics:

- Focus on illustrative motifs
- Often quirky elements such as floral or abstract patterns
- Use of quirky fonts

### Example brands



# Introducing the label types

## Dominant characteristics for label type Origin Specific

Prestigious

Klassik

Vibrant Classic

Standard

Young Classic

Simple  
Minimal

Artisan

Origin  
Specific

Vintage

Contemporary



### Dominant characteristics:

- Central motif, often a strong symbol of the country of origin, clearly indicates the provenance of the wine
- No standard use of font types or colours

### Example brands





# Introducing the label types

## Dominant characteristics for label type Vintage

Prestigious

Klassik

Vibrant Classic

Standard

Young Classic

Simple  
Minimal

Artisan

Origin  
Specific

Vintage

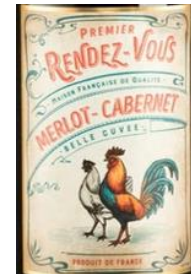
Contemporary



### Dominant characteristics:

- Vintage elements usually expressed in a modern style
- Use of vintage-styled fonts
- Heavy use of floral designs or coat of arms
- Eye-catching and strong contrasting colours

### Example brands



# Introducing the label types

## Dominant characteristics for label type Contemporary

Prestigious

Klassik

Vibrant Classic

Standard

Young Classic

Simple  
Minimal

Artisan

Origin  
Specific

Vintage

Contemporary



### Dominant characteristics:

- Use of elements that are not central to the category, such as unusual colours and label shapes
- A mix of modern and traditional elements
- Young, striking colours
- Use of sans serif font types
- Minimal information on the label

### Example brands



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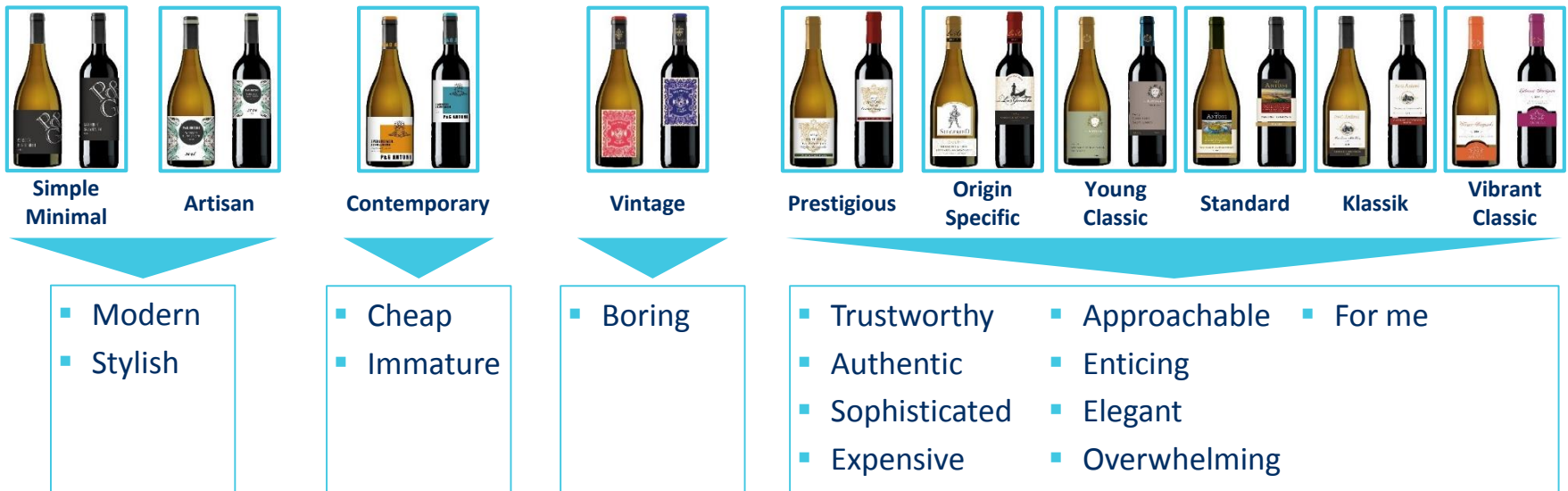
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Key measures	Question
Stand-out	<i>Please select the bottle of wines that first catch your attention</i>
Attractiveness	<i>How attractive do you find the label design on a scale of 1 to 5 where 1=very unattractive and 5=very attractive?</i>
Price expectations	<i>How much would you expect this bottle of wine to cost at the store where you typically buy wine? [respondents shown price scale to choose from]</i>
Quality expectations	<i>What do you think the quality of the wine shown would be? [on a scale of 1-5 where 1=very low quality and 5=very high quality]</i>
Likelihood to buy	<i>How likely would you be to buy these wines if they were available from where you usually buy wine and if the price was right for you? [on a scale of 1-5 where 1=very unlikely and 5=very likely]</i>
Occasions	<i>You say you are likely to buy this wine, please select the occasions for which you would consider buying it: [respondents see list of occasions]</i>
Imagery associations	<i>Below, you will see a list of statements and words that may describe the following wines. Please select up to 3 words or statements that are the most appropriate for each design</i>

# Key findings

Simple Minimal is most preferred label design followed by more traditional label types like Prestigious, Standard and Origin Specific

- Label type **Simple Minimal** has the **highest likelihood to buy/attractiveness scores** followed by **Prestigious, Standard** and **Origin Specific**
- With its minimalist design, Simple Minimal is the label type that** stands out most to the highest proportion of German regular wine drinkers
- Prestigious, Origin specific** and **Simple Minimal** are thought to have the highest expected average price
- Imagery associations** differ quite distinctly between different label types

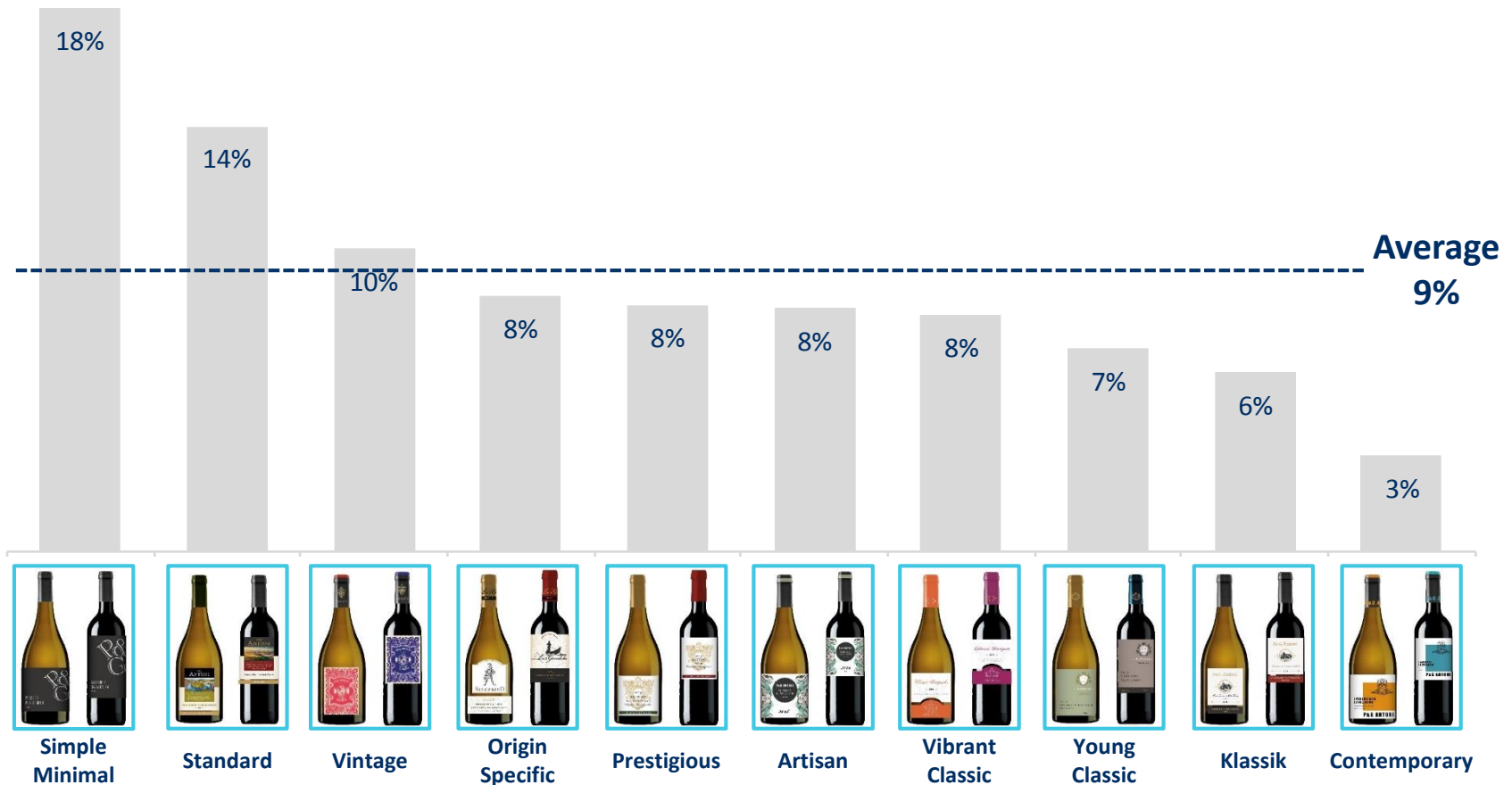


# Label stand-out

Simple Minimal has the largest share of German regular wine drinkers stating that it design that catches their attention followed by Standard and Vintage

## Label stand-out

% who identify the label that first catches their attention  
Base = All German regular wine drinkers (n=1,000)

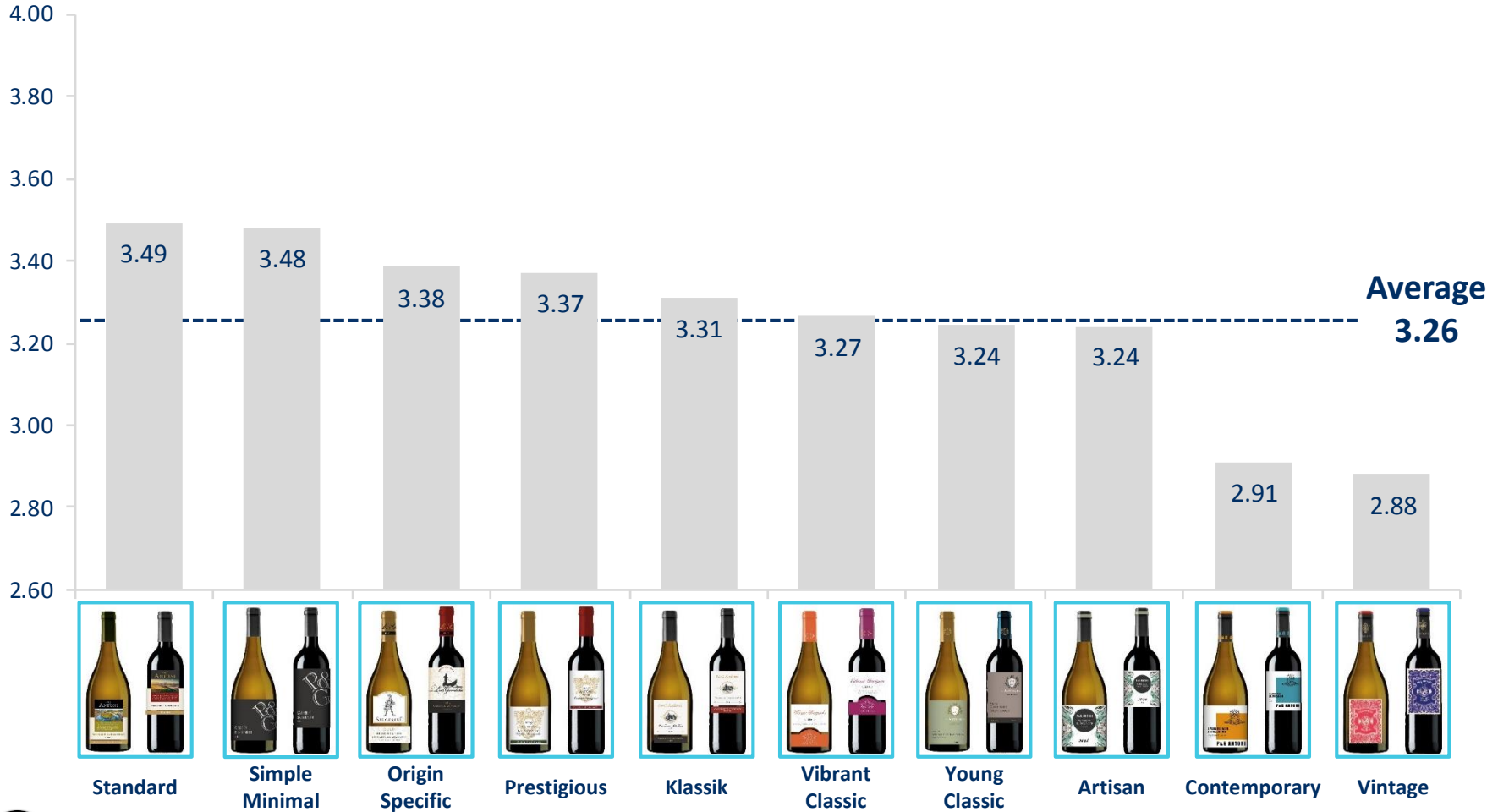


# Overall attractiveness of labels

Standard and Simple Minimal achieve the highest attractiveness score followed by Origin Specific and Prestigious. Contemporary and Vintage have very low scores in comparison

## Label category attractiveness

Mean calculated score out of 5, where 1=very unattractive, and 5=very attractive  
Base = All German regular wine drinkers (n=1,000)

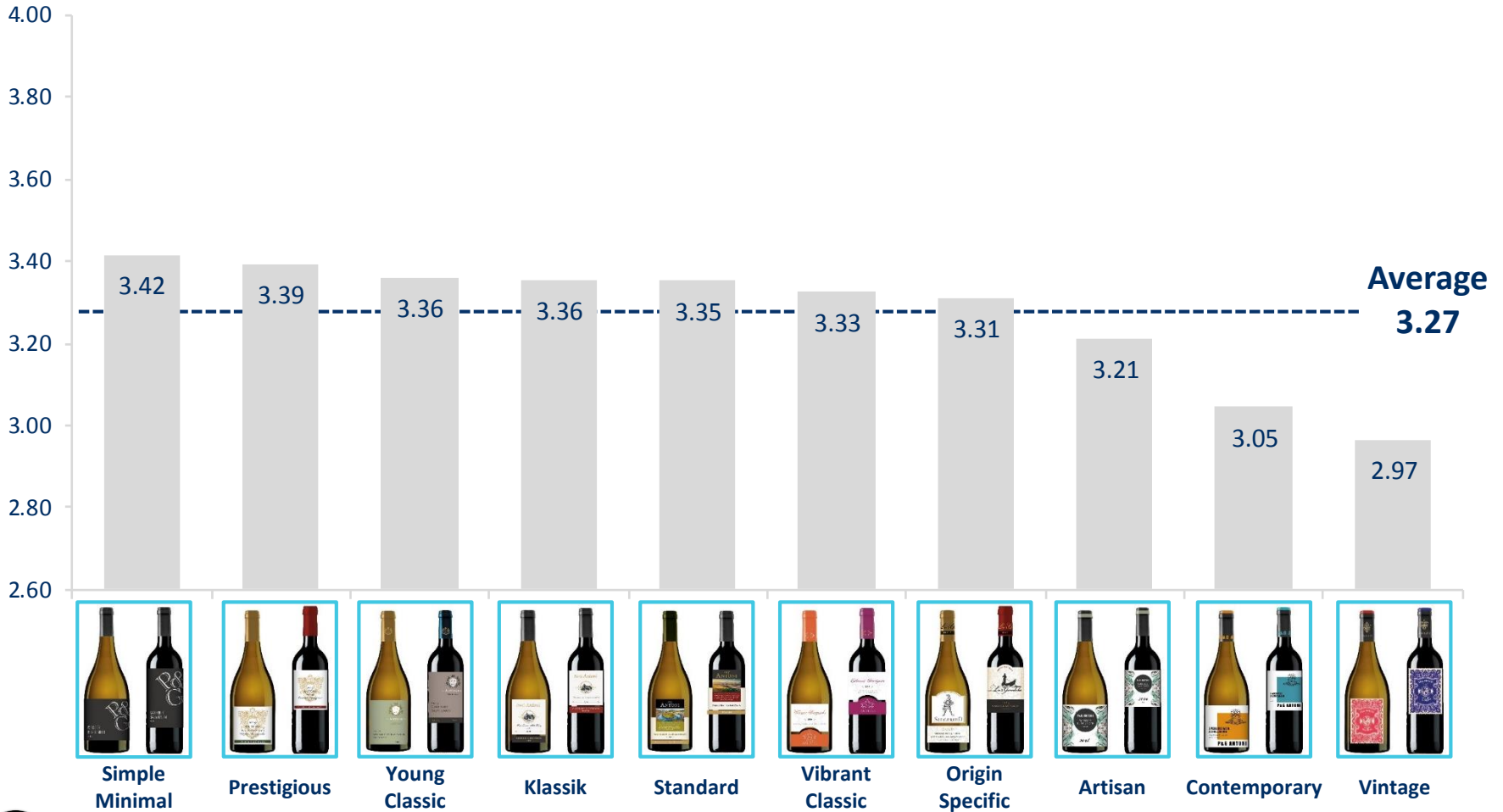


# Overall likelihood to buy

Simple Minimal achieves the highest likelihood to buy among German regular wine drinkers, closely followed by Prestigious, Young Classic, Klassik, Standard, Vibrant Classic and Origin Specific

## Likelihood to buy

Mean calculated score out of 5, where 1=not very likely, and 5=very likely  
Base = All German regular wine drinkers (n=1,000)



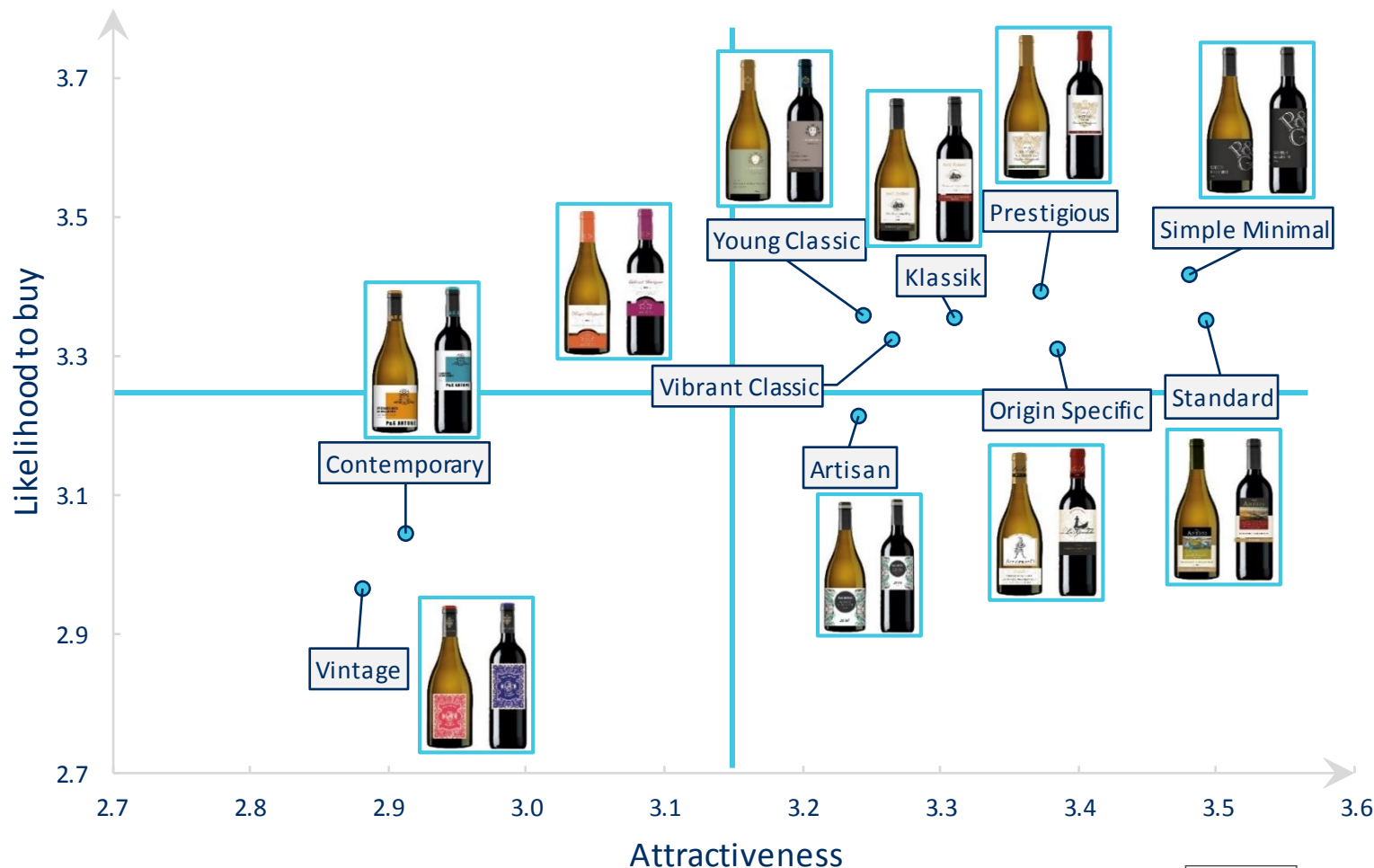


# Label likelihood to buy vs. attractiveness

Simple Minimal has the highest likelihood to buy/attractiveness scores followed by Prestigious, Standard and Origin Specific

## Label likelihood to buy vs. attractiveness

Analysis of mean likelihood to buy score and mean perception of attractiveness  
 Base = All German regular wine drinkers (n=1,000)

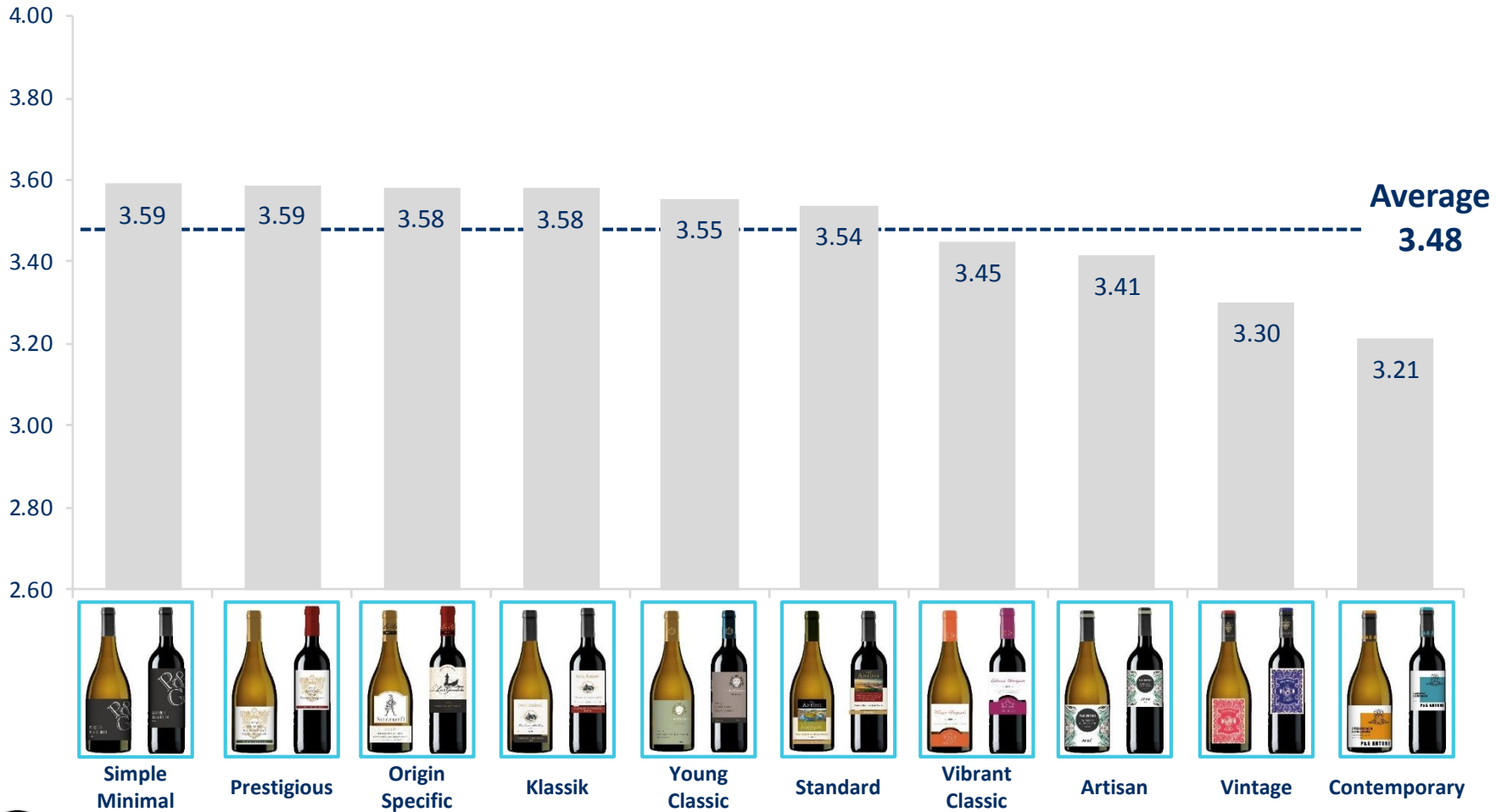


# Overall quality perception of labels

Simple Minimal, Prestigious, Origin Specific, Klassik, Young Classic and Standard quality perception scores are all quite similar

## Overall quality perceptions

Mean calculated score out of 5, where 1=very low quality, and 5=very high quality  
Base = All German regular wine drinkers (n=1,000)



Germany Label Design 2018

Source: Wine Intelligence, Vinitrac® Germany, Oct'17 (n=1,000), German regular wine drinkers



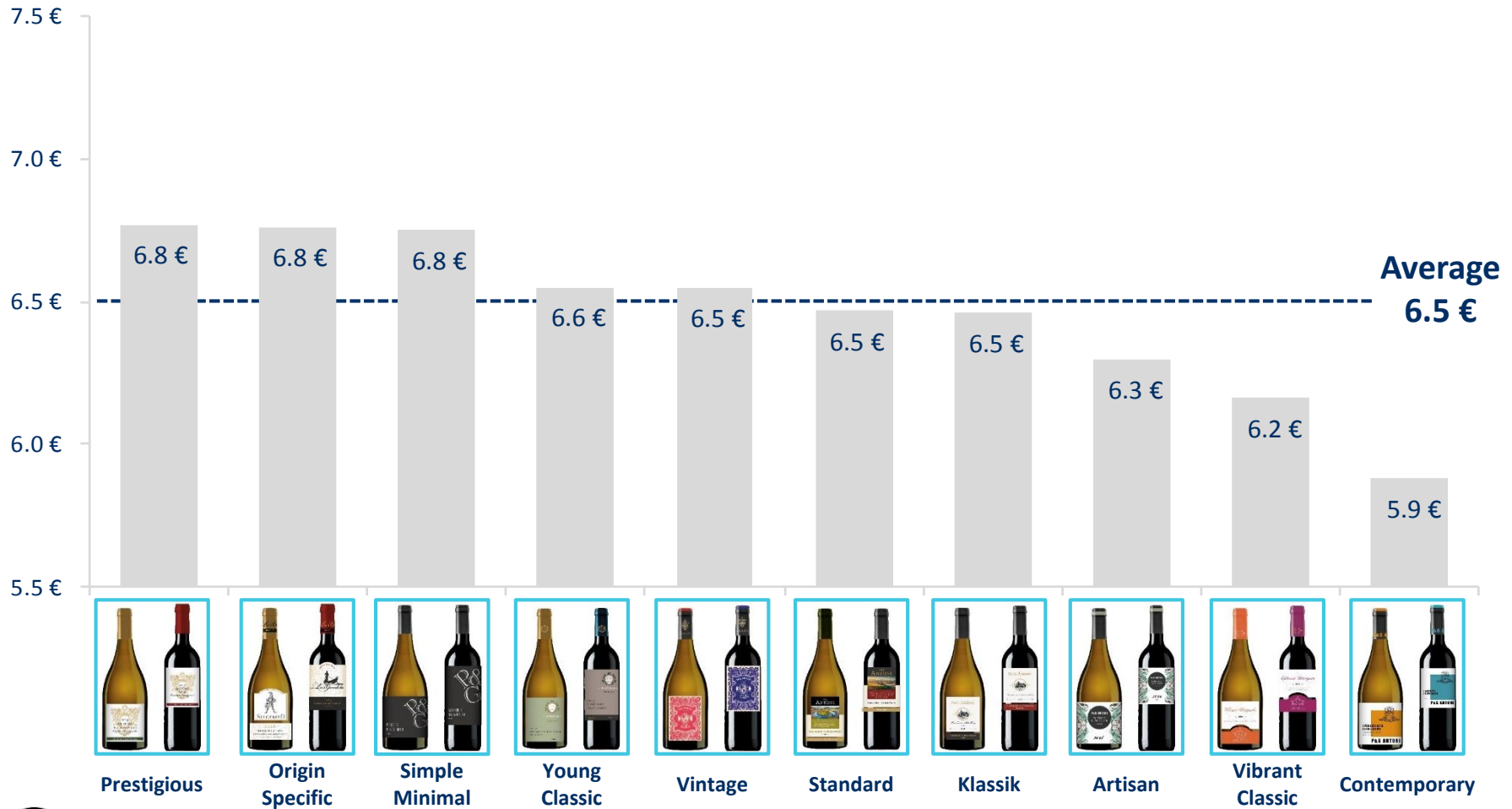
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# Overall expected average price perceptions of labels

Prestigious, Origin Specific and Simple Minimal all achieve the highest expected average price

## Average Price Expectations

Calculated average, from a scale of 8 given price brackets, respondents would expect the bottle of wine to cost at the store where they typically buy wine  
Base = All German regular wine drinkers (n=1,000)



# Imagery statements

The traditional label types, such as Klassik and Standard, are considered approachable and trustworthy, the more distinctive label types are associated with modern or stylish

## Imagery Statements

Top 3 selected statements that best applies to each label  
 Base = All German regular wine drinkers (n=1,000)

1. Prestigious	2. Klassik	3. Standard	4. Young Classic	5. Vibrant Classic
Modern	Approachable	Approachable	Approachable	Approachable
Stylish	Trustworthy	Trustworthy	Elegant	Ordinary
Elegant	Elegant	Authentic	Modern	Trustworthy

6. Contemporary	7. Simple Minimal	8. Artisan	9. Origin specific	10. Vintage
Modern	Modern	Modern	Approachable	Outdated
Boring	Stylish	Approachable	Elegant	Boring
Ordinary	Elegant	Stylish	Sophisticated	Approachable / Cheap

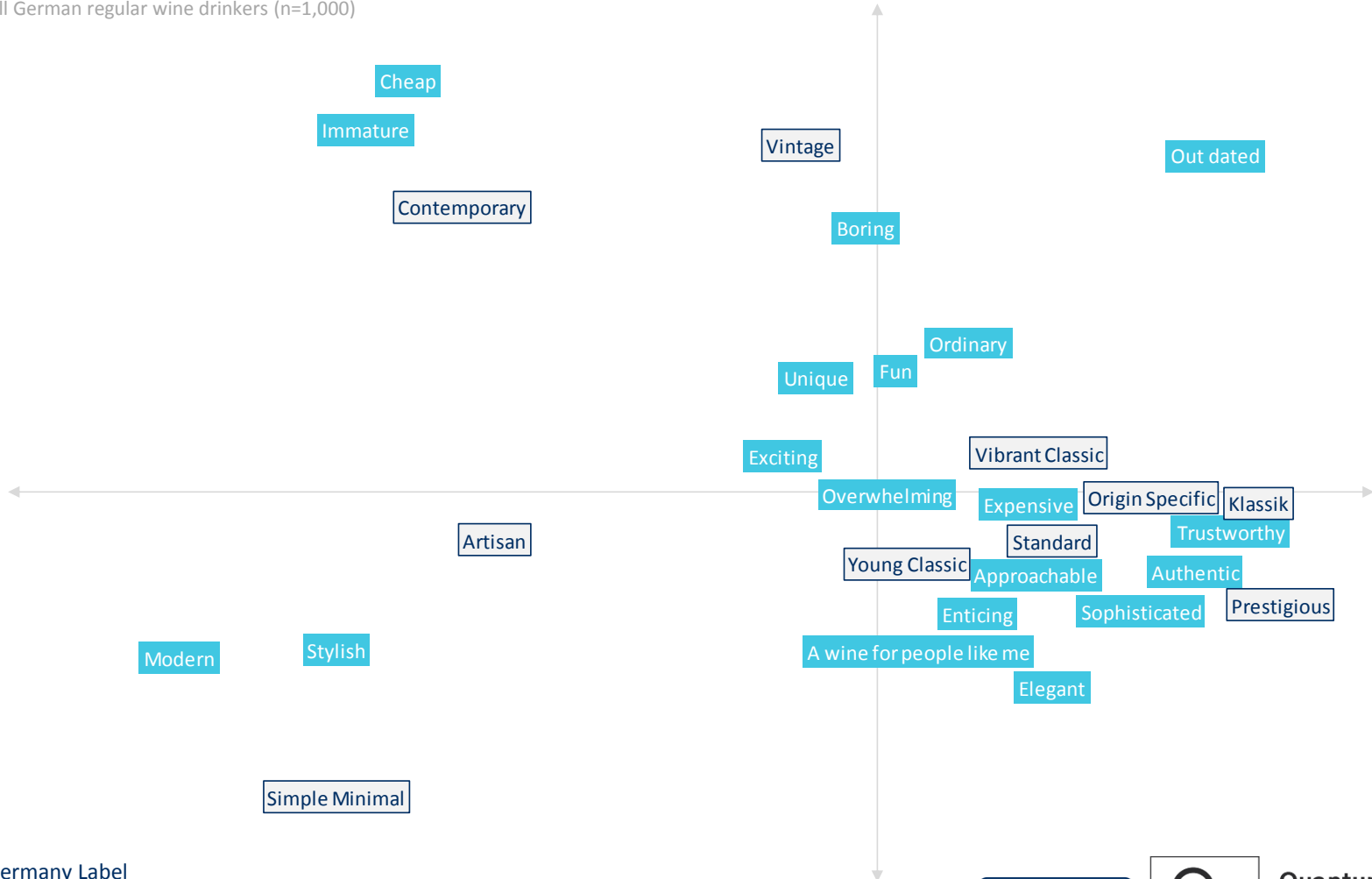


# Imagery statements

The label types Contemporary and Vintage as well as Simple Minimal and Artisan have strongly different Imagery associations the other more central types

## Imagery Statements

The positioning map is a graphical representation of the association between wine brands and statements. The strength of the association is measured by how far the brand and the statement are from the centre  
 Base = All German regular wine drinkers (n=1,000)



# Imagery statements

The label types Contemporary and Vintage as well as Simple Minimal and Artisan have strongly different Imagery associations the other more central types

## Imagery Statements

% who selected each statement as the most appropriate for each label design  
 Base = All German regular wine drinkers (n=1,000)

= Ranked in top 3 imagery statements for the label

	Simple Minimal	Standard	Prestigious	Young Classic	Origin Specific	Artisan	Klassik	Vibrant Classic	Vintage	Contemporary
<i>Sample size n=</i>	1000	1000	1000	1000	1000	1000	1000	1000	1000	1000
Approachable	19%	28%	24%	22%	25%	21%	25%	24%	13%	16%
Modern	40%	12%	6%	17%	8%	26%	8%	13%	11%	25%
Elegant	21%	12%	27%	20%	18%	12%	18%	15%	11%	9%
Trustworthy	7%	19%	17%	15%	15%	9%	18%	16%	8%	10%
Sophisticated	13%	12%	20%	16%	16%	9%	17%	9%	11%	6%
Ordinary	8%	10%	12%	14%	12%	10%	16%	19%	11%	18%
Stylish	27%	9%	8%	12%	9%	21%	6%	8%	12%	12%
Boring	7%	10%	12%	13%	11%	10%	12%	14%	16%	20%
Authentic	8%	16%	15%	13%	13%	8%	17%	16%	6%	9%
Enticing	10%	14%	11%	9%	11%	11%	11%	10%	8%	6%
Out dated	2%	8%	13%	7%	13%	5%	12%	9%	20%	7%
A wine for people like me	12%	13%	8%	10%	8%	9%	9%	11%	6%	6%
Exciting	10%	8%	7%	6%	10%	8%	5%	5%	10%	6%
Cheap	6%	6%	2%	5%	3%	9%	3%	6%	13%	13%
Expensive	7%	5%	11%	7%	8%	5%	6%	4%	8%	3%
Unique	6%	6%	5%	5%	7%	8%	5%	5%	11%	4%
Fun	4%	10%	3%	3%	8%	8%	6%	7%	7%	6%
Immature	6%	3%	3%	6%	4%	7%	3%	4%	8%	14%
Overwhelming	2%	2%	2%	2%	2%	2%	2%	2%	3%	1%
None of these	6%	8%	7%	8%	8%	9%	7%	8%	10%	9%

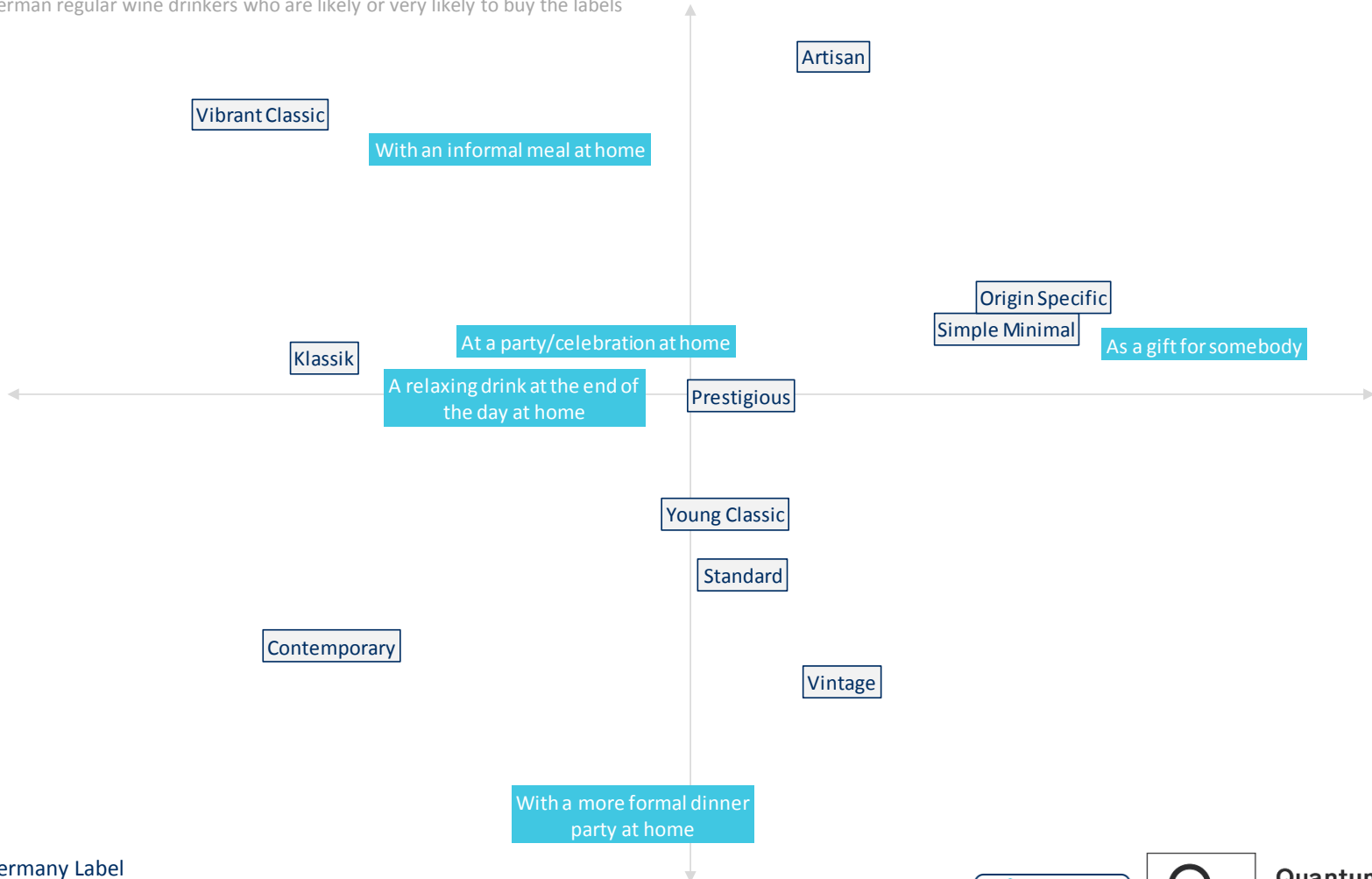


# Occasion suitability

Occasion suitability differs strongly between the 10 analysed label types

## Occasion suitability

The positioning map is a graphical representation of the association between wine brands and each occasion. The strength of the occasion is measured by how far the brand and the occasion are from the centre. Base = German regular wine drinkers who are likely or very likely to buy the labels



# Occasion suitability

Occasion suitability differs strongly between the 10 analysed label types

## Occasion suitability

% who would consider buying the following labels for each of the following occasions

Base = German regular wine drinkers who are likely or very likely to buy the labels

	Simple Minimal	Standard	Prestigious	Young Classic	Klassik	Origin Specific	Vibrant Classic	Artisan	Contemporary	Vintage
<i>Sample size n=</i>	463	449	438	437	429	423	413	389	317	315
A relaxing drink at the end of the day at home	50%	50%	46%	47%	48%	46%	52%	46%	47%	46%
As a gift for somebody	47%	39%	38%	38%	30%	42%	31%	41%	30%	39%
With an informal meal at home	36%	32%	34%	32%	33%	33%	38%	36%	33%	30%
At a party/celebration at home	35%	31%	32%	33%	34%	27%	33%	35%	29%	34%
With a more formal dinner party at home	29%	30%	29%	29%	26%	26%	25%	24%	31%	31%
None of these	2%	3%	1%	2%	2%	2%	2%	2%	4%	2%





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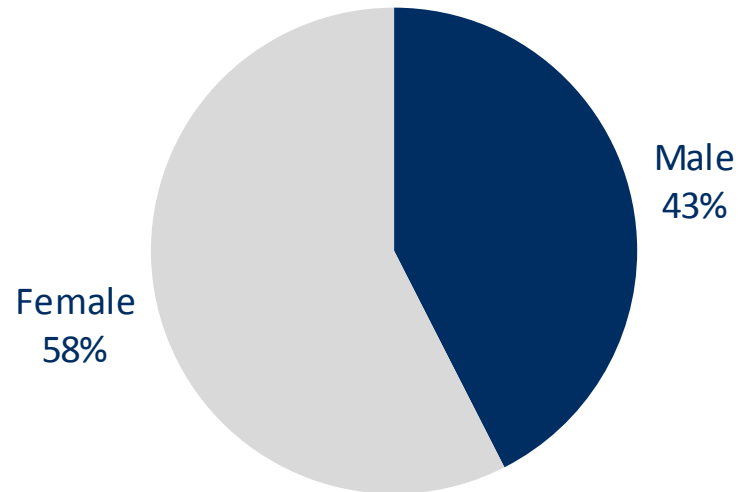
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# Gender distribution

Demographic distribution among German regular wine drinkers

## Gender distribution of German regular wine drinkers

Base = 1,000 German regular wine drinkers



# Key findings: Gender

Male regular wine drinkers prefer the Standard label design whereas female regular wine drinkers prefer Simple Minimal design

- Both genders consider that **Simple Minimal** and **Standard** label designs to stand out the most but differ in their opinion for the other types of labels
- When it comes to likelihood to buy and attractiveness both genders have a differing opinion. Males award **Standard** with the highest likelihood to buy and attractiveness score while females award **Simple Minimal** with the highest score in these two measures
- Although females have a higher quality perception for all types of labels, except for Contemporary, both genders are vastly similar in their ranking of the label types by quality perception

## Top 3 label designs in likelihood to buy and attractiveness among gender

✓ = among the top 3  
✓✓ = highest scoring

	1. Prestigious	2. Klassik	3. Standard	4. Young Classic	5. Vibrant Classic	6. Contemporary	7. Simple Minimal	8. Artisan	9. Origin Specific	10. Vintage
Males			✓✓				✓		✓	
Females	✓		✓				✓✓			

# Label Standout: By gender

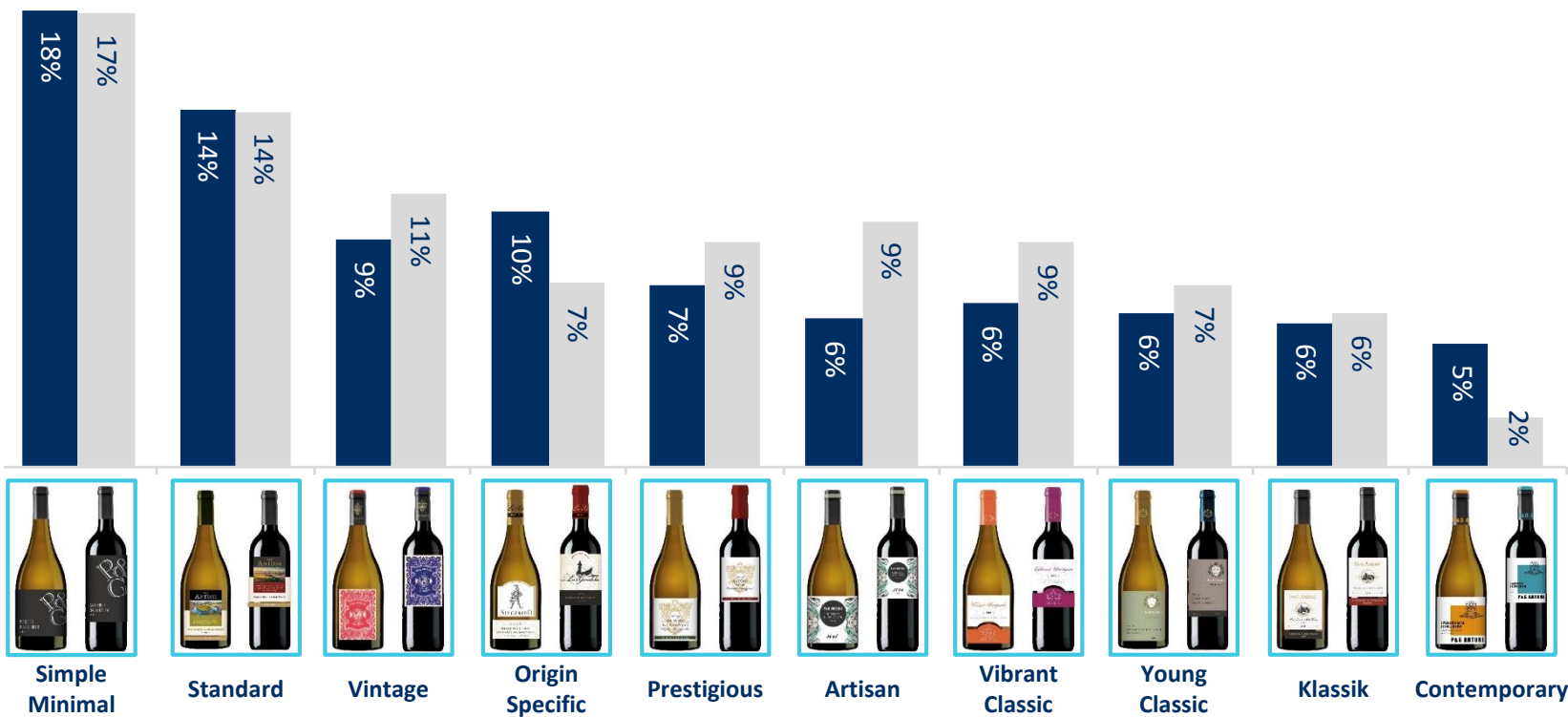
Both genders consider that Simple Minimal and Standard label designs to stand out the most – small differences of opinion among lower-ranked labels

## Label stand-out: By gender

% who identify the label that first catches their attention

■ Male (n=425)

■ Female (n=575)

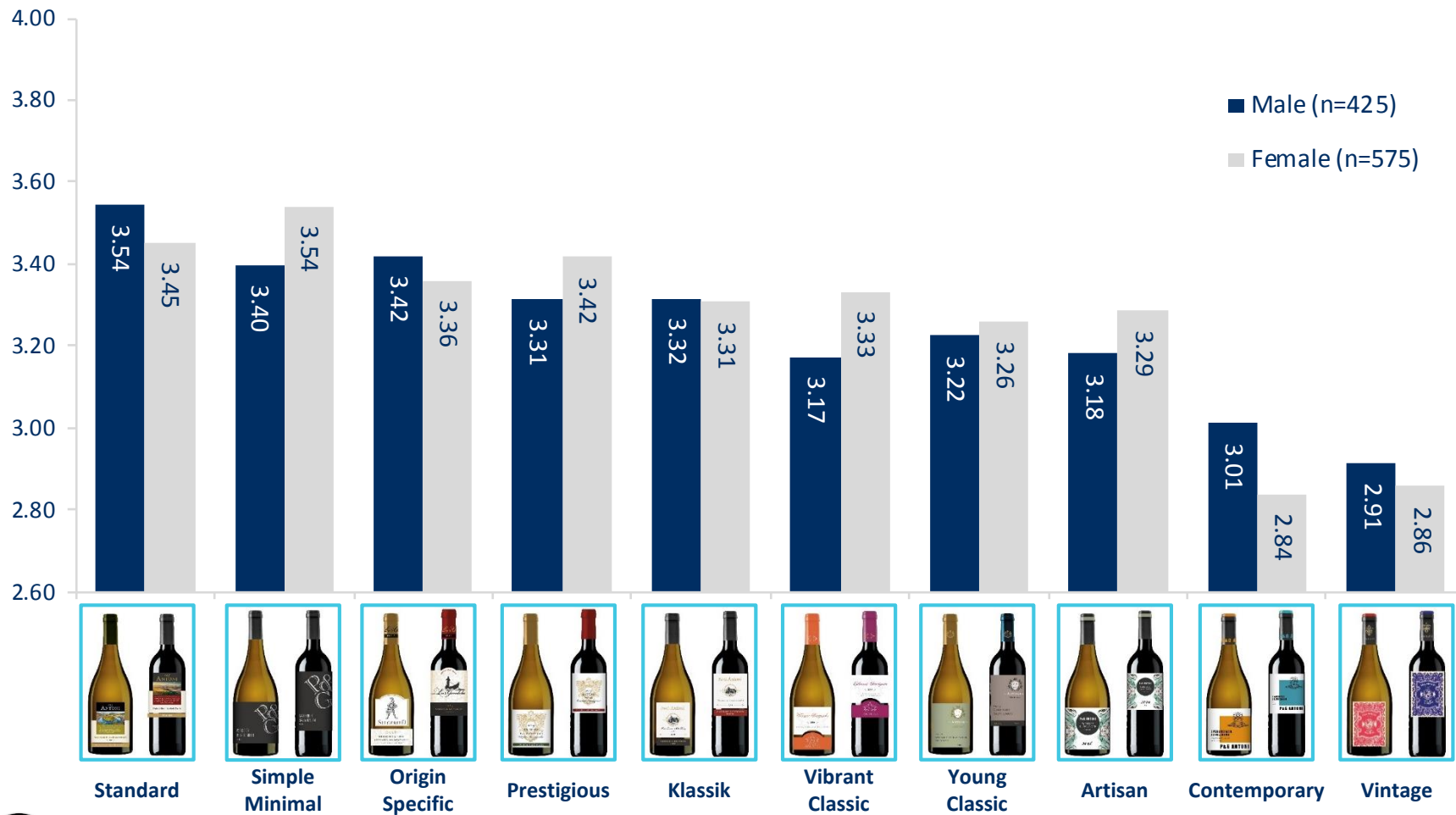


# Attractiveness: By gender

Suggestion that female regular wine drinkers find Simple Minimal, Prestigious, Vibrant Classic and Artisan slightly more attractive compared to male regular wine drinkers – though not statistically significant

## Label attractiveness: By gender

Mean calculated score out of 5, where 1=very unattractive, and 5=very attractive

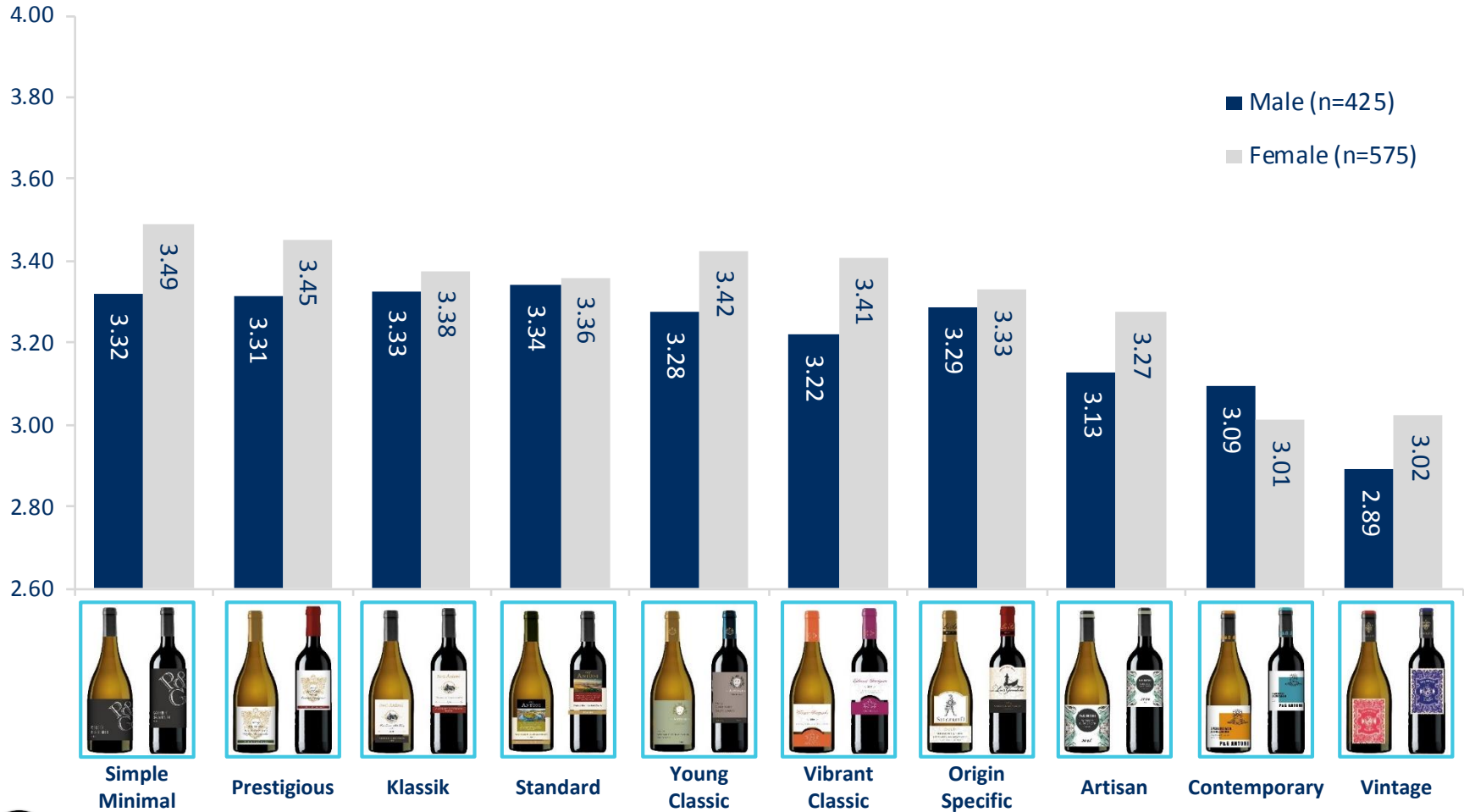


# Likelihood to buy: By gender

Suggestion that female regular wine drinkers are generally more enthusiastic about the bottle designs than male regular wine drinkers apart from Contemporary - though not statistically significant

## Likelihood to buy: By gender

Mean calculated score out of 5, where 1=not very likely, and 5=very likely

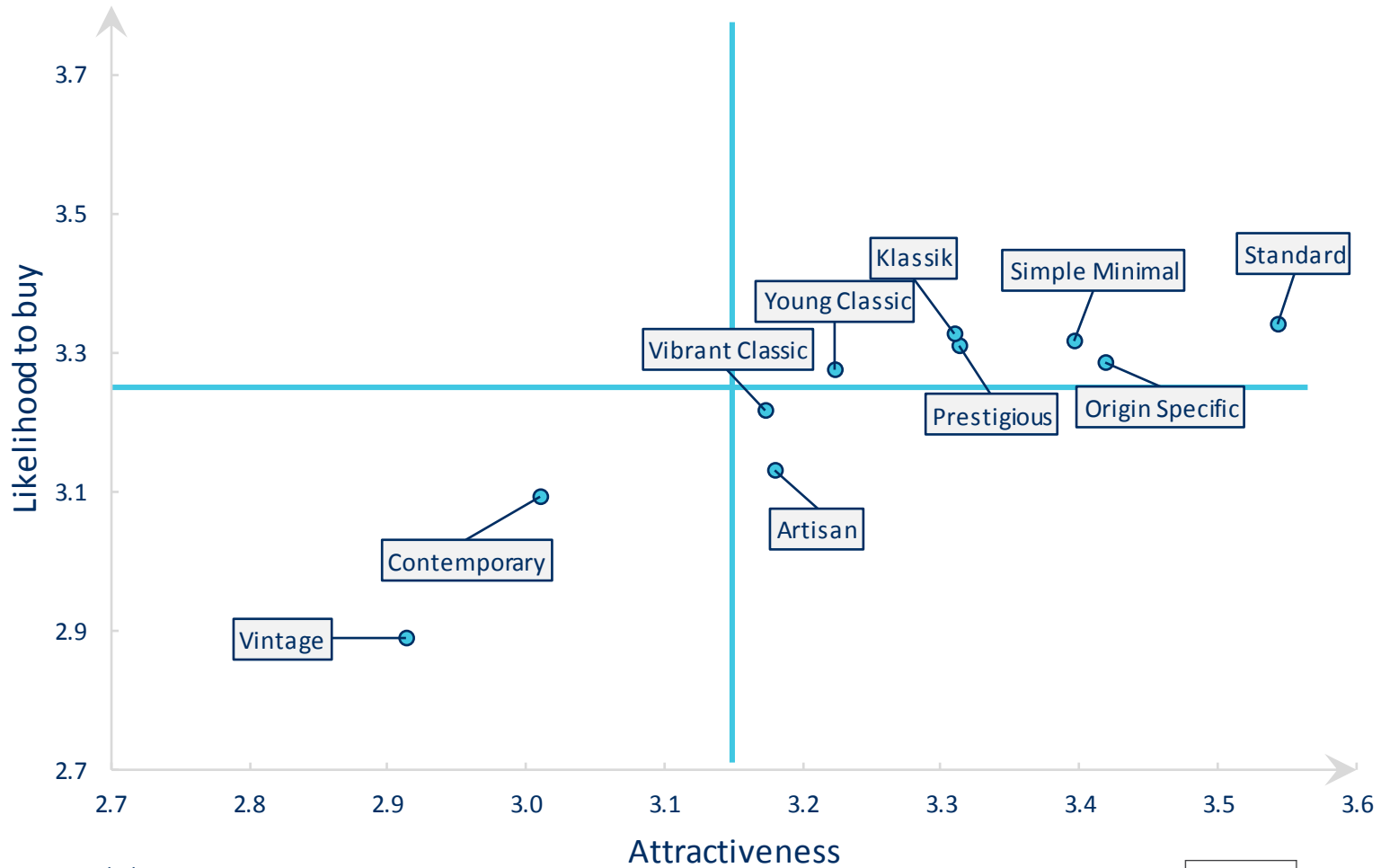


# Likelihood to buy vs. attractiveness: Males

Standard label design achieves the highest mean score among males for the attractiveness and likelihood to buy

## Label likelihood to buy vs. attractiveness amongst males

Analysis of mean attractiveness score and mean likelihood to buy score  
 Base = All male German regular wine drinkers (n=425)

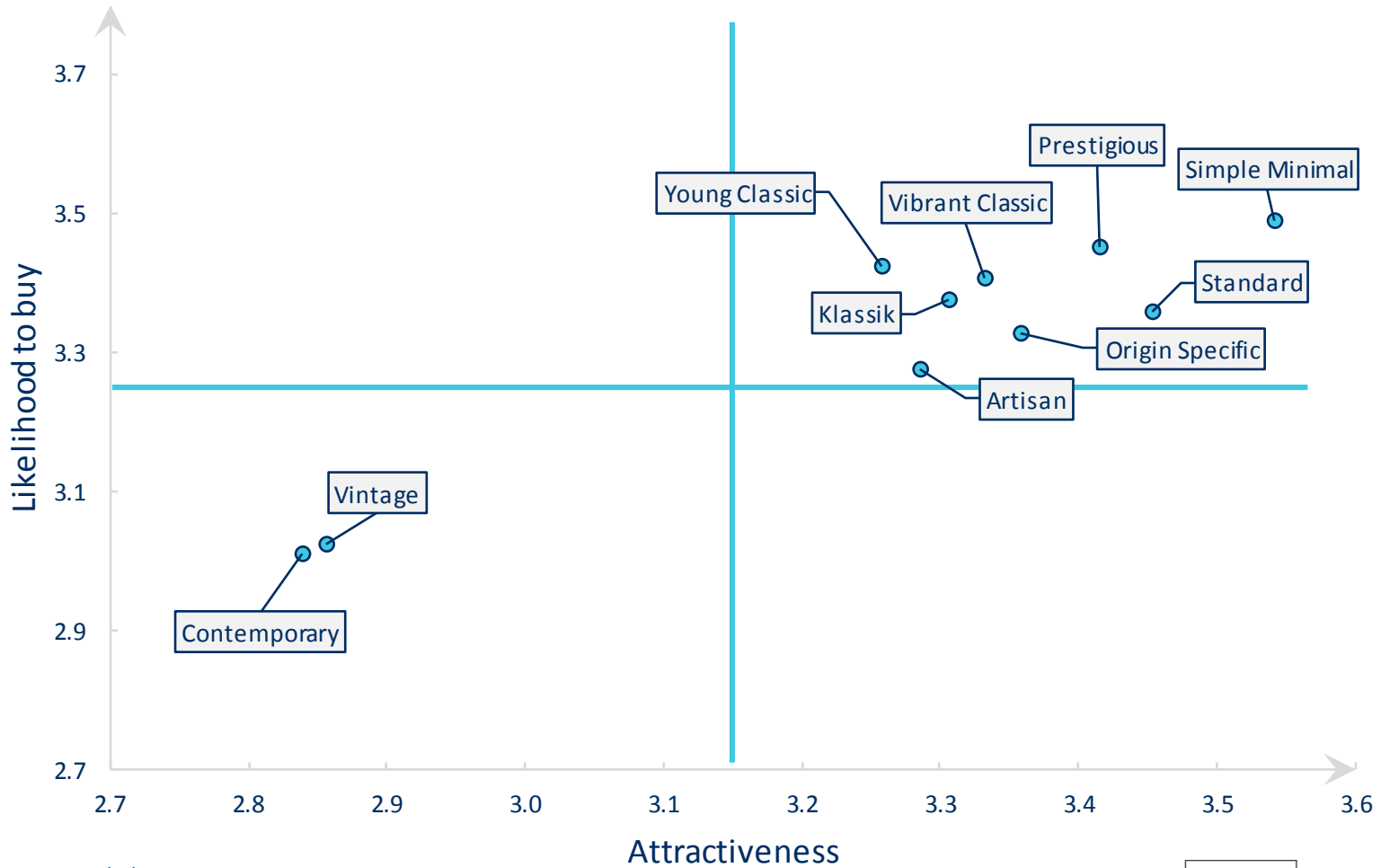


# Likelihood to buy vs. attractiveness: Females

Simple Minimal label design achieves the highest mean score among females for the attractiveness and likelihood to buy

## Label likelihood to buy vs. attractiveness amongst females

Analysis of mean attractiveness score and mean likelihood to buy score  
 Base = All female German regular wine drinkers (n=575)



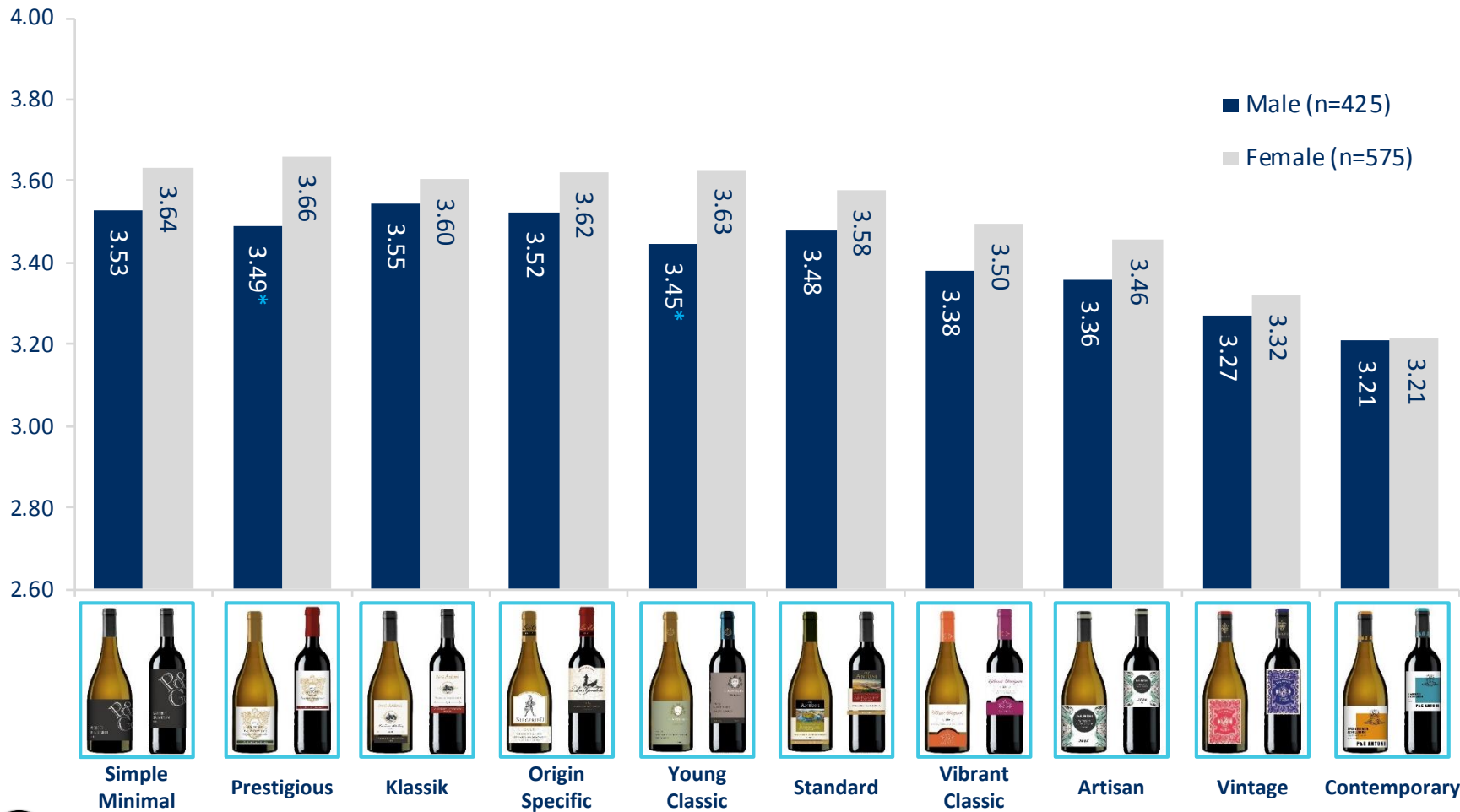


# Perceived quality: By gender

Males are significantly less likely, compared to all German regular wine drinkers, to perceive Prestigious or Young Classic as offering high quality

## Perceived quality of labels: By gender

Mean calculated score out of 5, where 1=very low quality, and 5=very high quality



Germany Label Design 2018

\*/\* : Statistically significantly higher/lower than all German regular wine drinkers at a 95% confidence level  
 Source: Wine Intelligence, Vinitrac® Germany, Oct'17 (n=1,000), German regular wine drinkers



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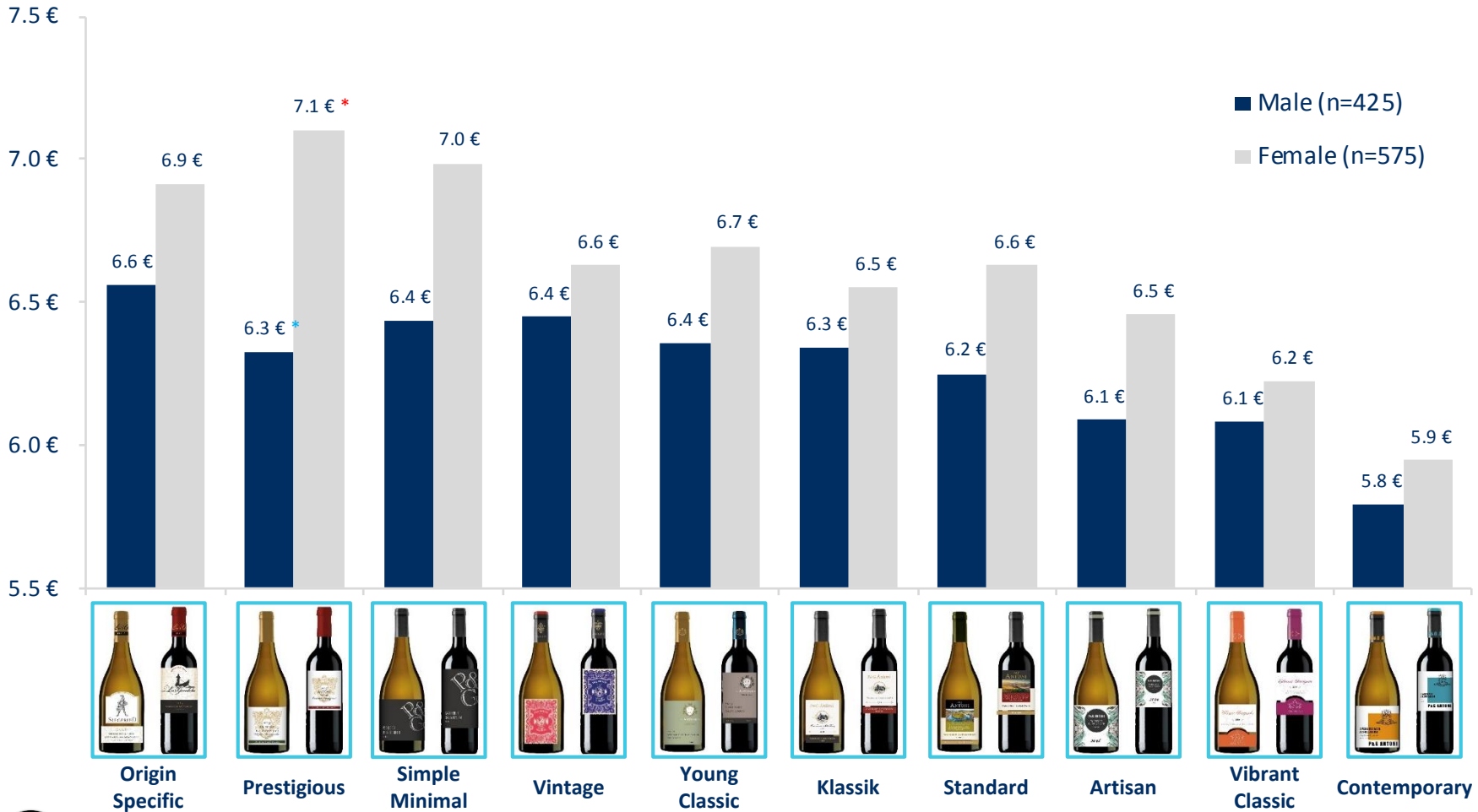
# Expected average price: By gender

Females are significantly more likely to expect the Prestigious label design to have a higher price compared to all German regular wine drinkers, while males are less so



## Expected average price: By gender

Calculated average, from a scale of 8 given price brackets, respondents would expect the bottle of wine to cost at the store where they typically buy wine



Germany Label Design 2018

\*/\*: Statistically significantly higher/lower than all German regular wine drinkers at a 95% confidence level. Source: Wine Intelligence, Vinitrac® Germany, Oct'17 (n=1,000), German regular wine drinkers



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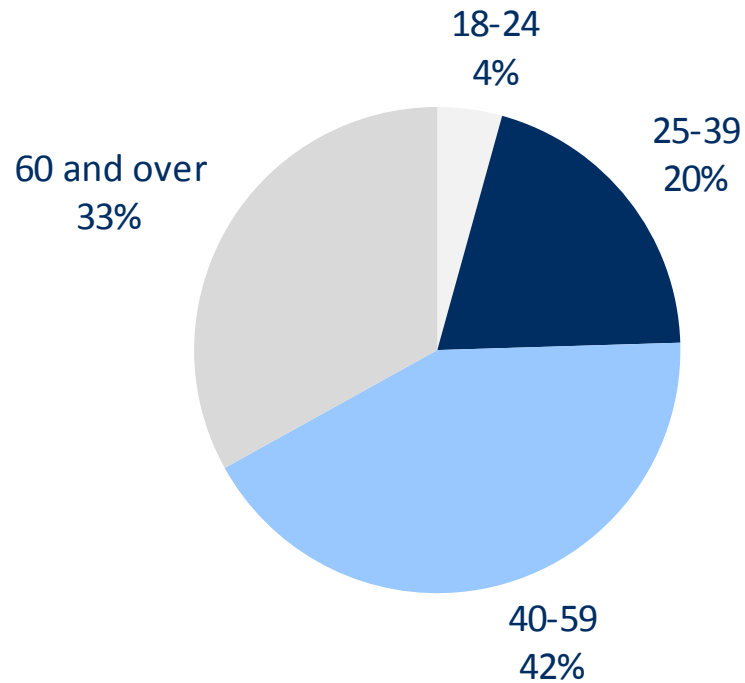
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# Age distribution

Demographic distribution among German regular wine drinkers

## Age distribution of German regular wine drinkers

Base = 1,000 German regular wine drinkers



# Key findings: Age

## Age groups differ strongly in their preferences for wine labels

- In the wine category, a person's age is closely correlated to their experience in the category, and therefore their confidence in reading the message that a label is trying to put across. However, lack of experience can have two contrasting effects:
  1. A lack of confidence and a desire to conform
  2. An open-minded attitude, and therefore the tendency to view labels on their own merits, rather than in terms of comparison with a conventional norm
- The older age segments (i.e. those over 60) find the more unconventional labels far less appealing. They are more likely to find the **Standard** label the most attractive and are more likely to buy it compared to the other label types, followed by **Klassik** and **Origin Specific**
- On the other hand, regular wine drinkers between 25 - 39 are more likely to purchase and find more attractive **Simple Minimal** compared to other labels, followed by **Prestigious**, **Vibrant Classic** and **Artisan**
- Regular wine drinkers between 40 – 59 are less extreme in their preferences. They are more likely to find **Simple Minimal** and **Standard** the most attractive and are more likely to buy these label designs compared to the others, followed by **Prestigious** and **Origin Specific**

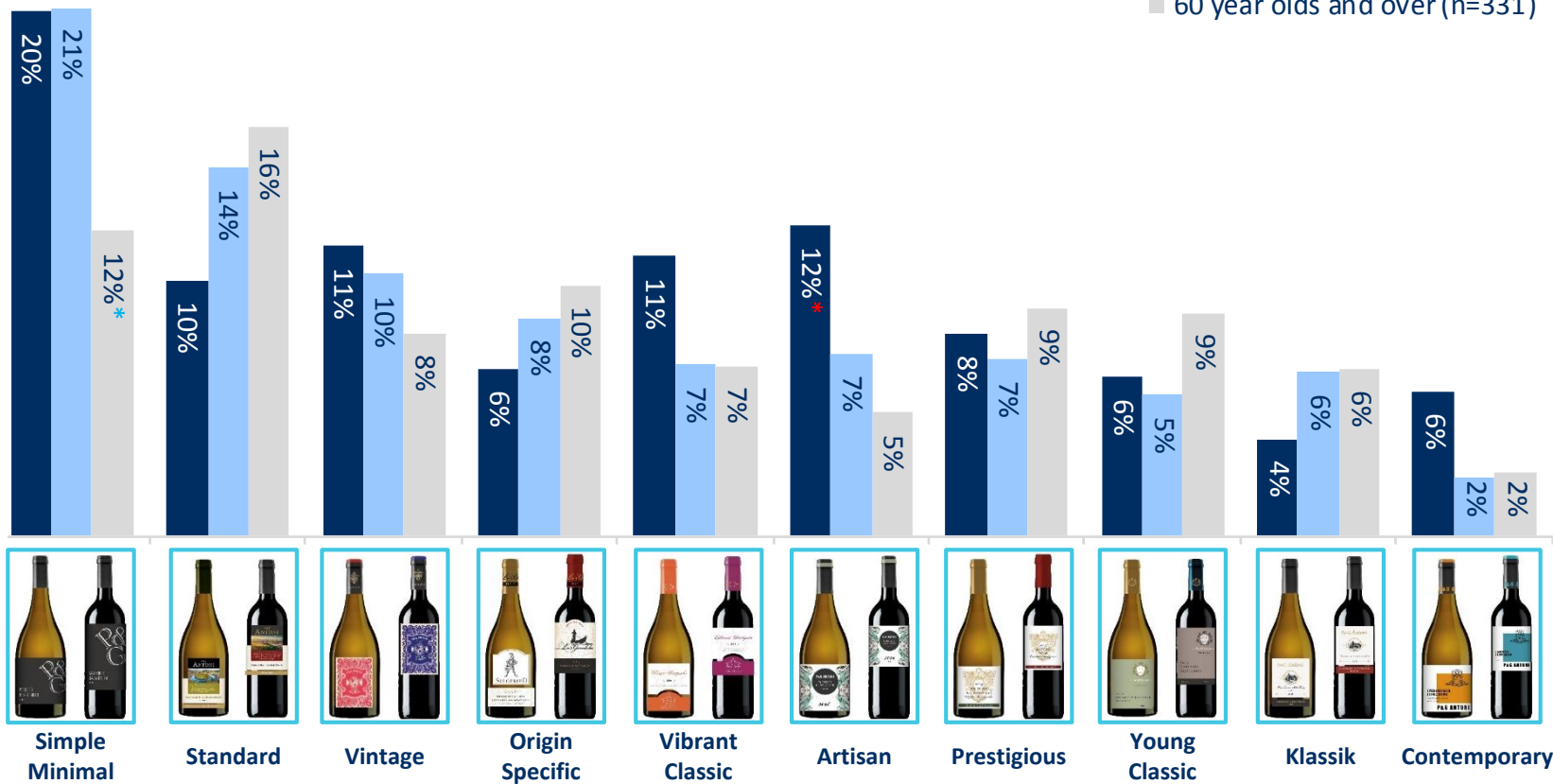
# Label Standout: By age

Strong differences in opinion among the different age groups in terms of label stand-out. Simple Minimal stands out the most to those under the age of 59; under 40s also see Artisan as distinctive

## Label stand-out: By age

% who identify the label that first catches their attention

- 25-39 year olds (n=202)
- 40-59 year olds (n=424)
- 60 year olds and over (n=331)



Germany Label Design 2018

\*/\* : Statistically significantly higher/lower than all German regular wine drinkers at a 95% confidence level. Source: Wine Intelligence, Vinitrac® Germany, Oct'17 (n=1,000), German regular wine drinkers



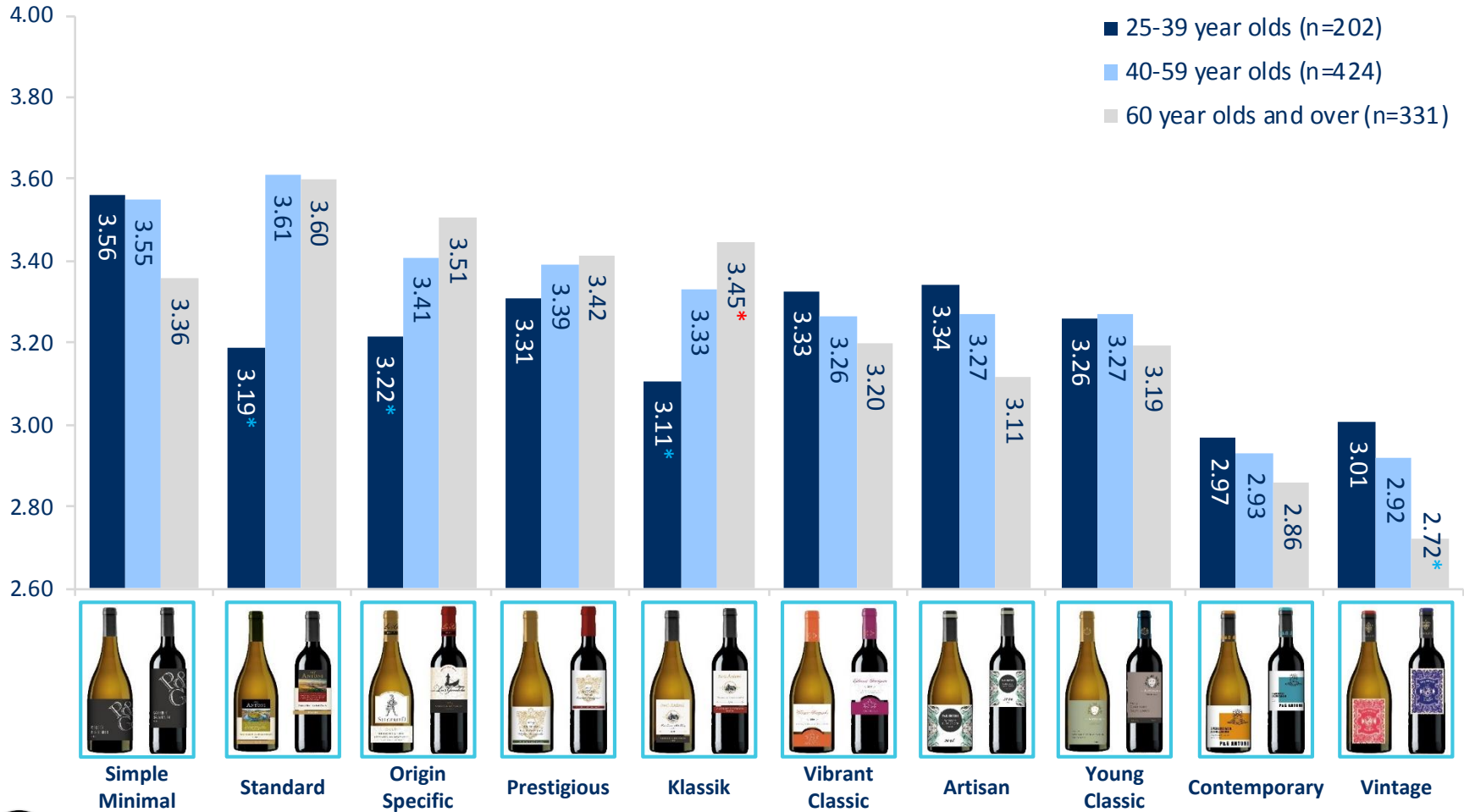
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# Attractiveness: By age

Younger regular wine drinkers are less likely to find Standard, Origin Specific and Klassik attractive compared to all regular wine drinkers while those over 60 find Klassik more attractive

## Label attractiveness: By age

Mean calculated score out of 5, where 1=very unattractive, and 5=very attractive



Germany Label Design 2018

\*/\* : Statistically significantly higher/lower than all German regular wine drinkers at a 95% confidence level  
 Source: Wine Intelligence, Vinitrac® Germany, Oct'17 (n=1,000), German regular wine drinkers



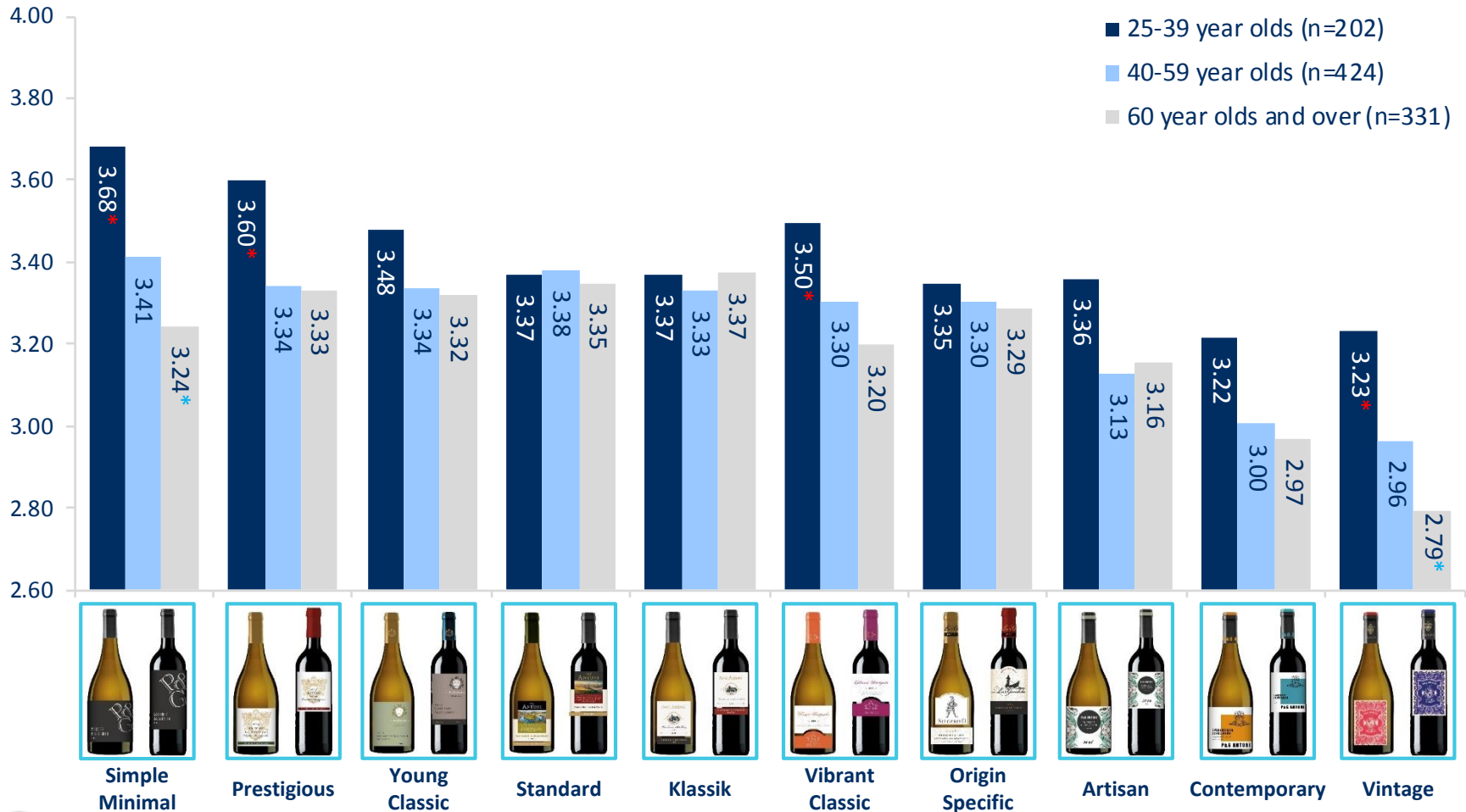
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# Likelihood to buy: By age

Those aged between 25-39 are significantly more likely to buy Simple Minimal, Prestigious, Vibrant Classic and Vintage compared to all German regular wine drinkers

## Likelihood to buy: By age

Mean calculated score out of 5, where 1=not very likely, and 5=very likely



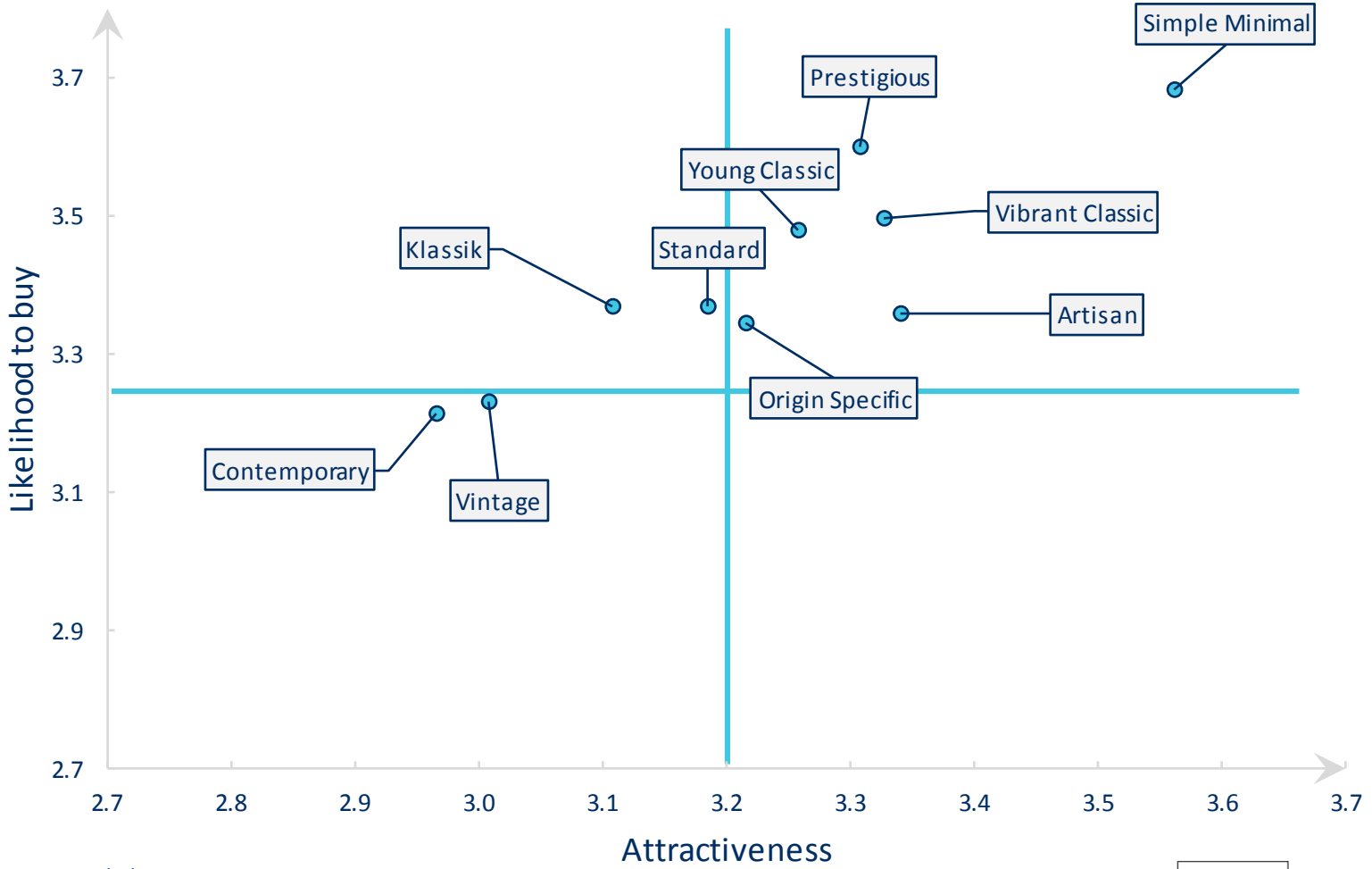


# Likelihood to buy vs. attractiveness: 25 - 39

Simple Minimal label design achieves the highest mean score among those aged between 25 and 39 for the attractiveness and likelihood to buy

## Label likelihood to buy vs. attractiveness among 25 - 39

Analysis of mean attractiveness score and mean likelihood to buy score  
 Base = All German regular wine drinkers aged between 25-39 (n=202)

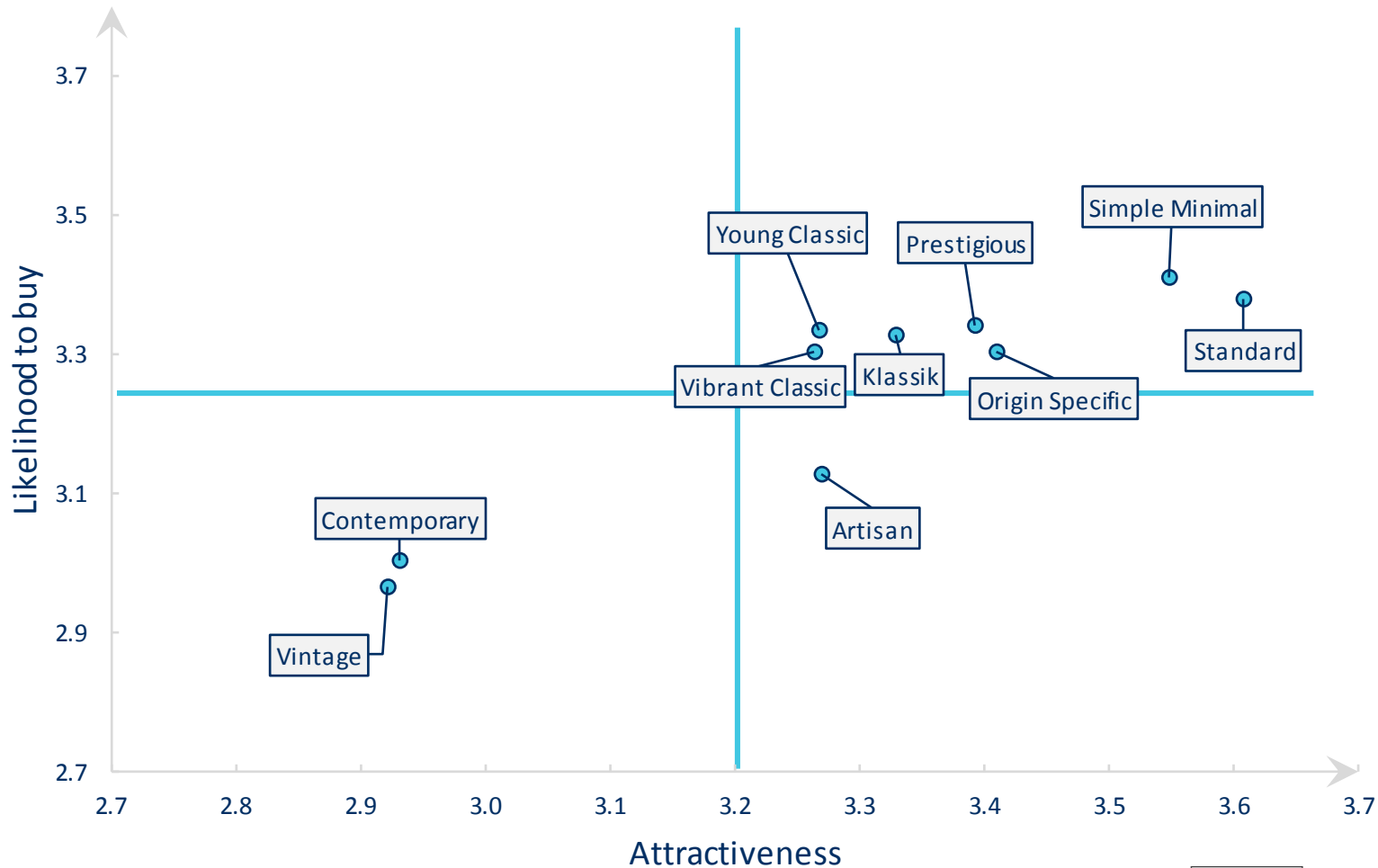


# Likelihood to buy vs. attractiveness: 40 - 59

While Standard achieves the highest score in terms of attractiveness among those aged between 40 and 59 they are more likely to buy Simple Minimal

## Label likelihood to buy vs. attractiveness among 40 - 59

Analysis of mean attractiveness score and mean likelihood to buy score  
 Base = All German regular wine drinkers aged between 40-59 (n=424)

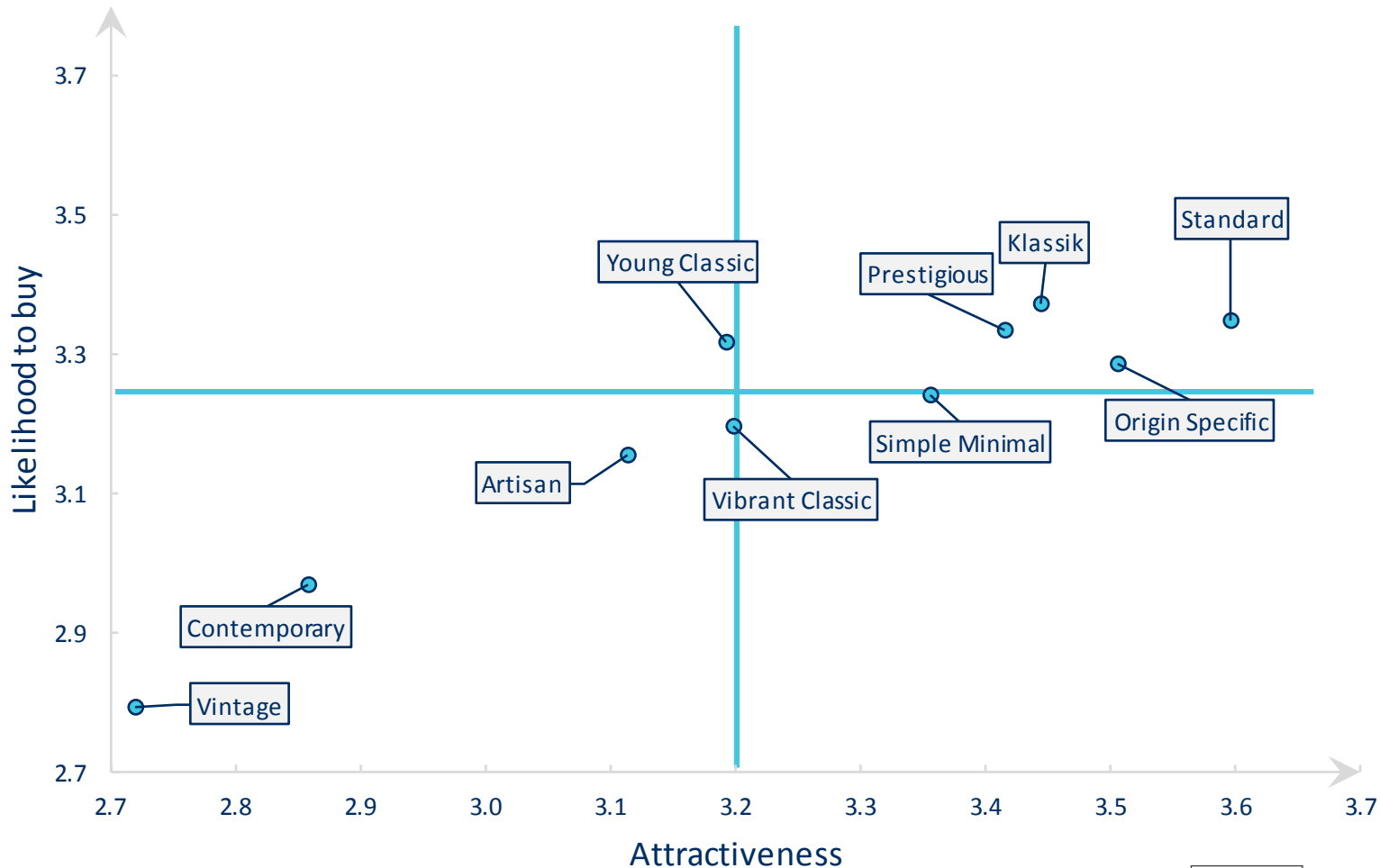


# Likelihood to buy vs. attractiveness: 60 and over

While Standard achieves the highest score in terms of attractiveness among those aged over 60 they are more likely to buy Klassik

## Label likelihood to buy and attractiveness among 60 and over

Analysis of mean attractiveness score and mean likelihood to buy score  
 Base = All German regular wine drinkers aged over 60 (n=331)

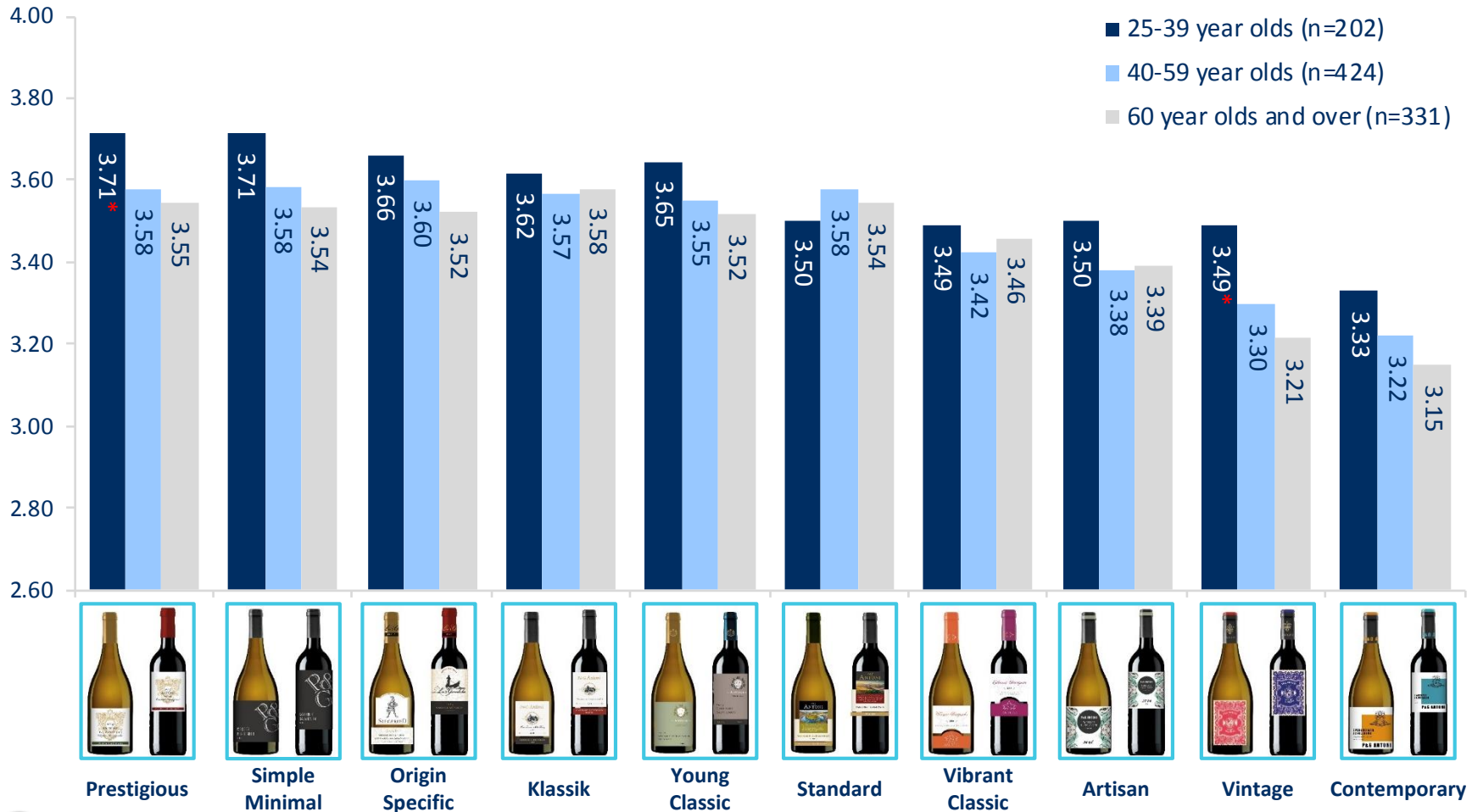


# Perceived quality: By age

Young regular wine drinkers are significantly most likely to perceive a higher quality level from Prestigious and Vintage label designs compared to all regular wine drinkers

## Perceived quality of labels: By age

Mean calculated score out of 5, where 1=very low quality, and 5=very high quality



Germany Label Design 2018

\*/\* : Statistically significantly higher/lower than all German regular wine drinkers at a 95% confidence level  
 Source: Wine Intelligence, Vinitrac® Germany, Oct'17 (n=1,000), German regular wine drinkers



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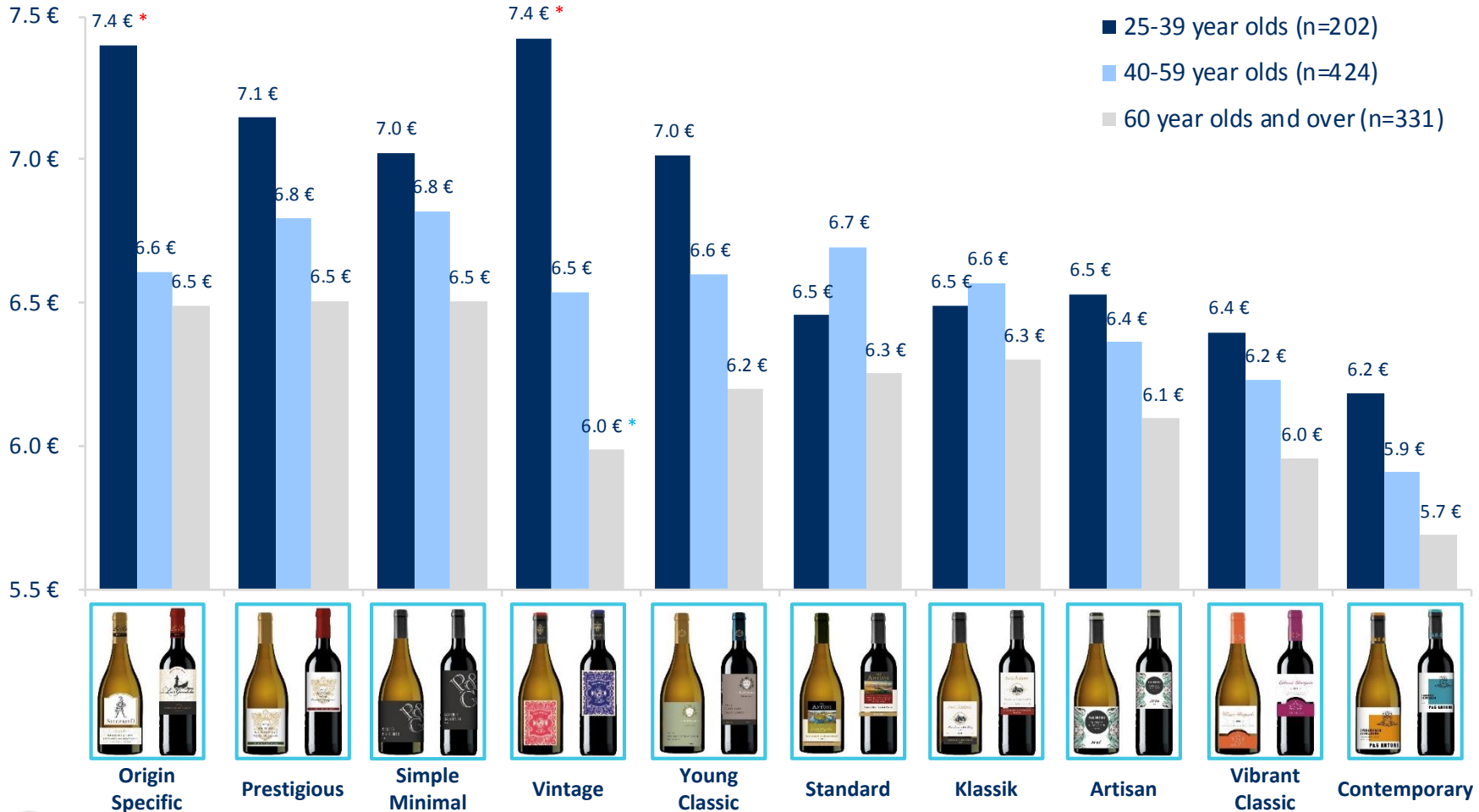
# Expected average price: By age

On average, younger regular wine drinkers are more likely to expect a higher average price for all label designs particularly Origin Specific and Vintage compared to all regular wine drinkers



## Expected average price: By age

Calculated average, from a scale of 8 given price brackets, respondents would expect the bottle of wine to cost at the store where they typically buy wine



Germany Label Design 2018

\*/\* : Statistically significantly higher/lower than all German regular wine drinkers at a 95% confidence level. Source: Wine Intelligence, Vinitrac® Germany, Oct'17 (n=1,000), German regular wine drinkers



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# Off-trade spend on a bottle for a relaxing drink

Sample distribution by off-trade spend

Off-trade spend: Spend on a bottle of wine as a relaxing drink at the end of the day at home

**93%**  
of German regular  
wine drinkers consume  
wine as a relaxing  
drink at the end of the  
day at home

Spend on a bottle of wine as a relaxing drink at the end of the day at home	2017	
	n=	934
Less than € 4,99	56%	
Between € 5,00 and € 9,99	36%	
More than € 10,00	8%	

# Key findings: Off-trade spend for a relaxing drink

Lower spending regular wine drinkers prefer the Standard label type, while higher spending regular wine drinkers prefer the Simple Minimal label type

- **Simple Minimal** scores highly across all spend groups
- Those who spend below € 4,99 on a bottle of wine as a relaxing drink at the end of the day at home are more likely to buy and find most attractive the **Standard** label design while those who spend above that are more likely to find **Simple Minimal** attractive and are therefore more likely to buy
- **Origin specific, Prestigious** and **Simple Minimal** are considered to have the highest expected price out of all other label designs by all three spending groups

**Top 3** in likelihood to buy and attractiveness among those who spend the following on a bottle of wine as a relaxing drink at the end of the day at home

✓ = among the top 3  
 ✓✓ = highest scoring

	1. Prestigious	2. Klassik	3. Standard	4. Young Classic	5. Vibrant Classic	6. Contemporary	7. Simple Minimal	8. Artisan	9. Origin Specific	10. Vintage
Less than €4,99			✓✓				✓		✓	
€5,00 - €9,99	✓		✓				✓✓			
More than €10,00							✓✓	✓	✓	





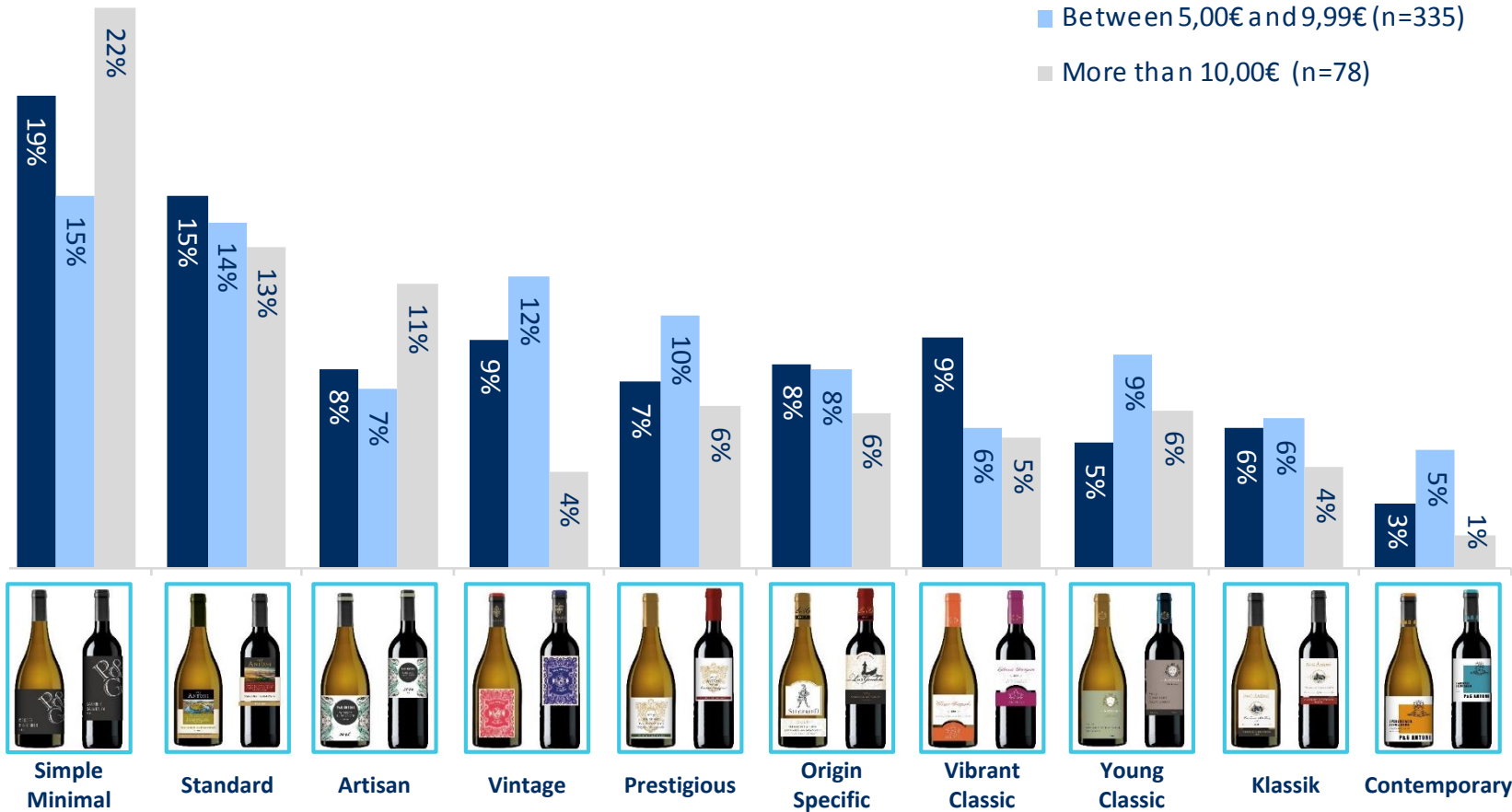
# Label stand-out: By off-trade spend

Simple Minimal stands out the most for all spending groups

## Label stand-out: By spend on a bottle of wine as a relaxing drink at the end of the day at home

% who identify the label that first catches their attention

- Less than 4,99€ (n=520)
- Between 5,00€ and 9,99€ (n=335)
- More than 10,00€ (n=78)

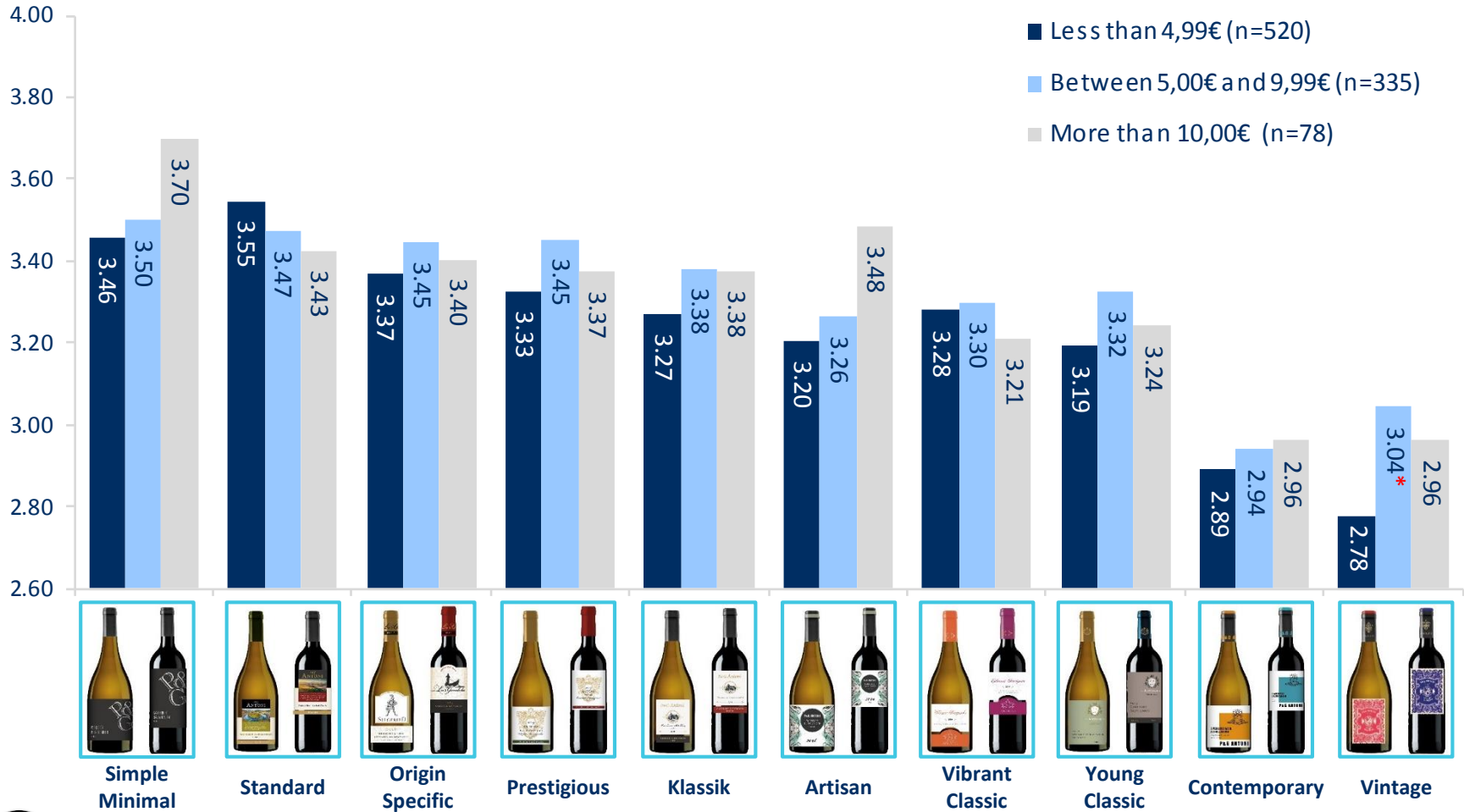


# Attractiveness: By off-trade spend

Suggestion that those who spend more on a bottle of wine as a relaxing drink at the end of the day at home are more likely to find Simple Minimal and Artisan attractive – but not sufficient difference to be statistically significant

## Label attractiveness: By spend on a bottle of wine as a relaxing drink at the end of the day at home

Mean calculated score out of 5, where 1=very unattractive, and 5=very attractive



Germany Label Design 2018

Source: Wine Intelligence, Vinitrac® Germany, Oct'17 (n=1,000), German regular wine drinkers



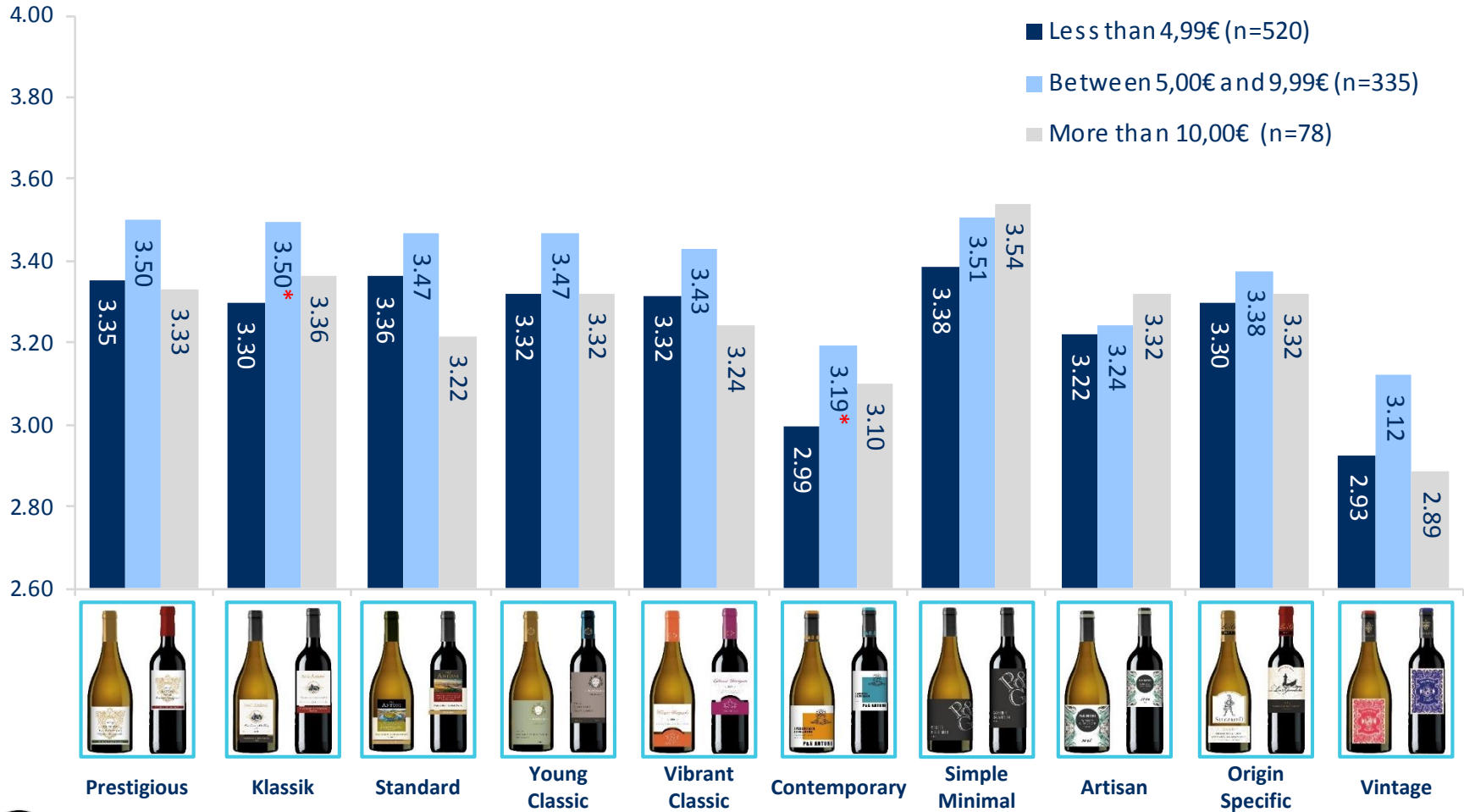
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# Likelihood to buy: By off-trade spend

Those who spend between 5-9,99€ on a bottle of wine as a relaxing drink at the end of the day at home are more likely to buy Klassik and Contemporary compared to all regular wine drinkers

## Likelihood to buy: By spend on a bottle of wine as a relaxing drink at the end of the day at home

Mean calculated score out of 5, where 1=not very likely, and 5=very likely



Germany Label Design 2018

\*/\* : Statistically significantly higher/lower than all German regular wine drinkers at a 95% confidence level  
 Source: Wine Intelligence, Vinitrac® Germany, Oct'17 (n=1,000), German regular wine drinkers



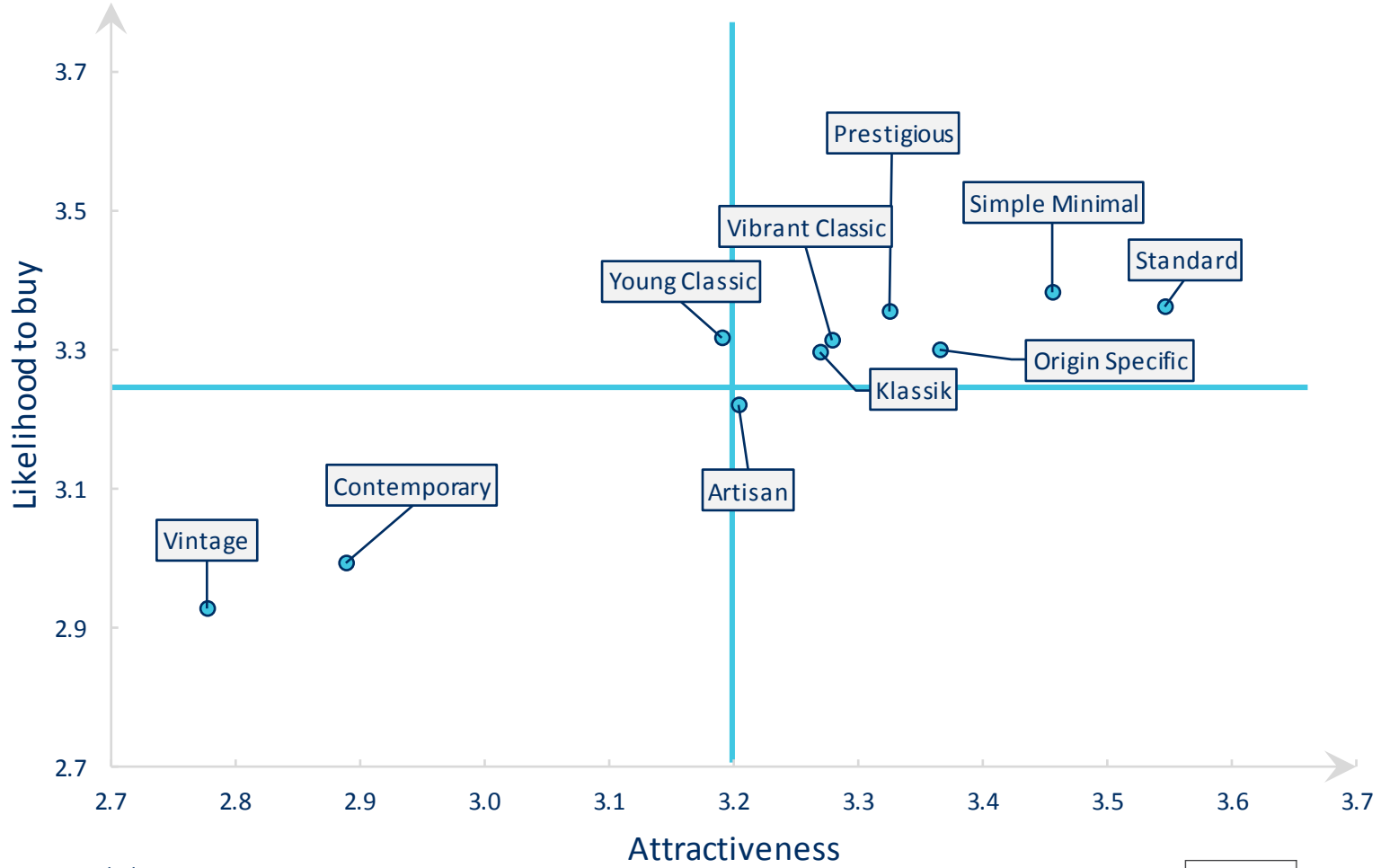
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# Likelihood to buy vs. attractiveness: Less than 4,99€

While Standard achieves the highest score in terms of attractiveness among those who spend less than 4,99€ they are more likely to buy Simple Minimal

## Label likelihood to buy and attractiveness among those who spend less than 4,99€

Analysis of mean attractiveness score and mean likelihood to buy score  
 Base = All German regular wine drinkers who spend less than 4,99€ on a bottle of wine for a relaxing drink at home at the end of the day (n=520)

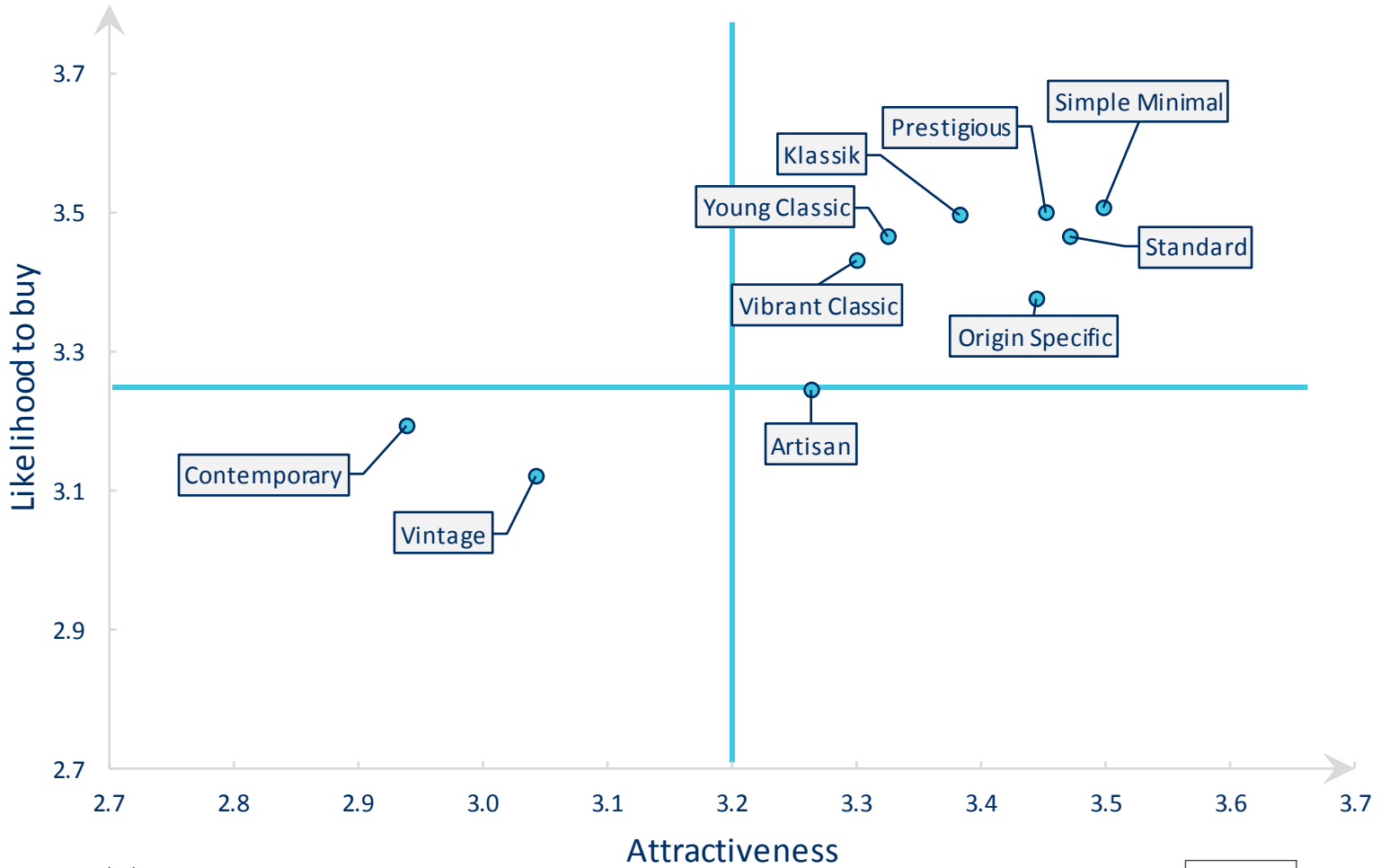


# Likelihood to buy vs. attractiveness: 5,00 – 9,99€

Simple Minimal label design achieves the highest mean score among those who spend between 5-9,99€ for the attractiveness and likelihood to buy

## Label likelihood to buy and attractiveness among those who spend to pay 5,00 – 9,99€

Analysis of mean attractiveness score and mean likelihood to buy score  
 Base = All German regular wine drinkers who spend between than 5,99€ and 9,99€ on a bottle of wine for a relaxing drink at home at the end of the day (n=335)



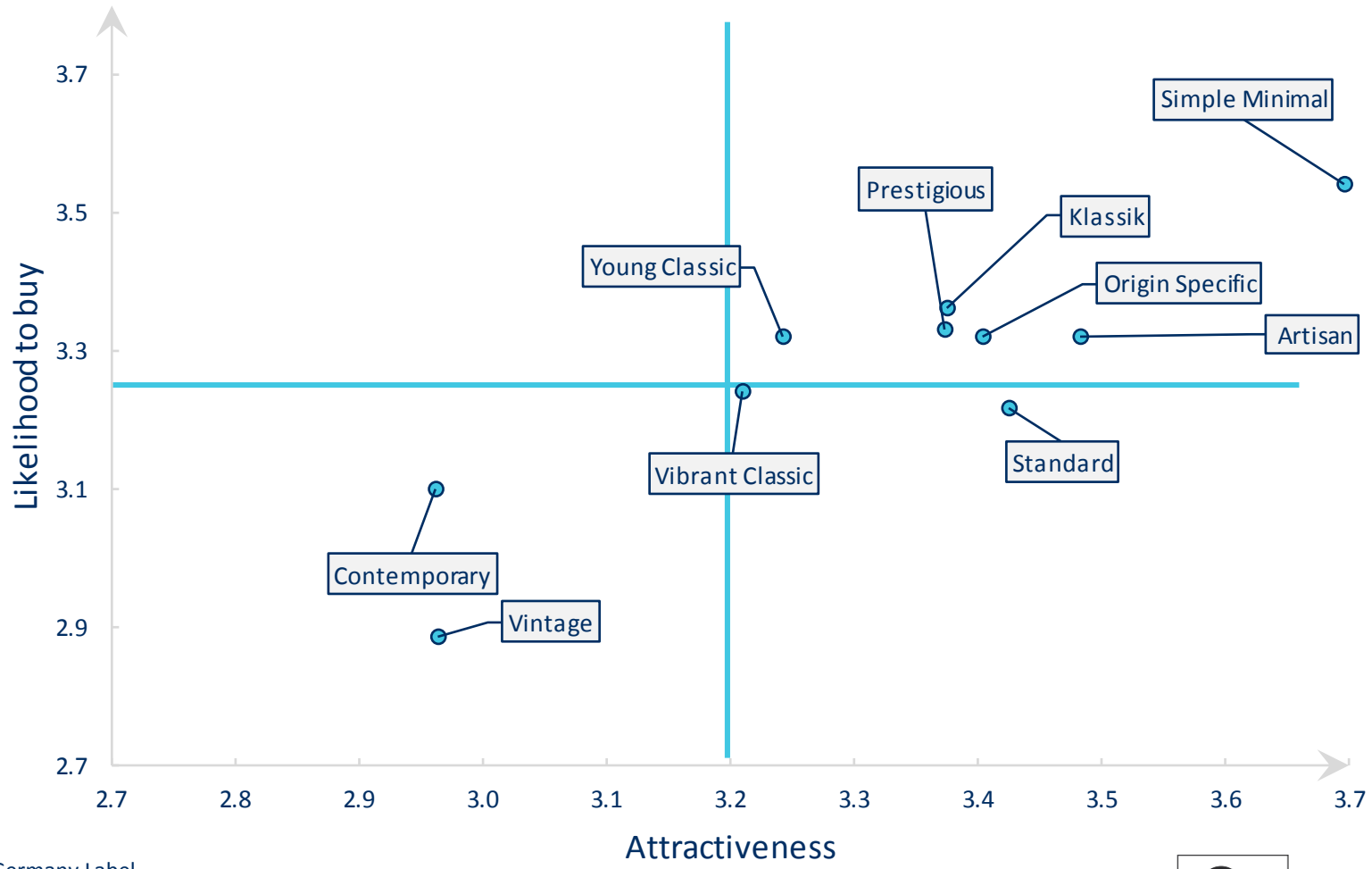
# Likelihood to buy vs. attractiveness: More than 10,00€

Simple Minimal label design achieves the highest mean score among those who spend above 10€ for the attractiveness and likelihood to buy

## Label likelihood to buy and attractiveness among those who spend more than 10,00€

Analysis of mean attractiveness score and mean likelihood to buy score

Base = All German regular wine drinkers who spend more than 10,00€ on a bottle of wine for a relaxing drink at home at the end of the day (n=78)

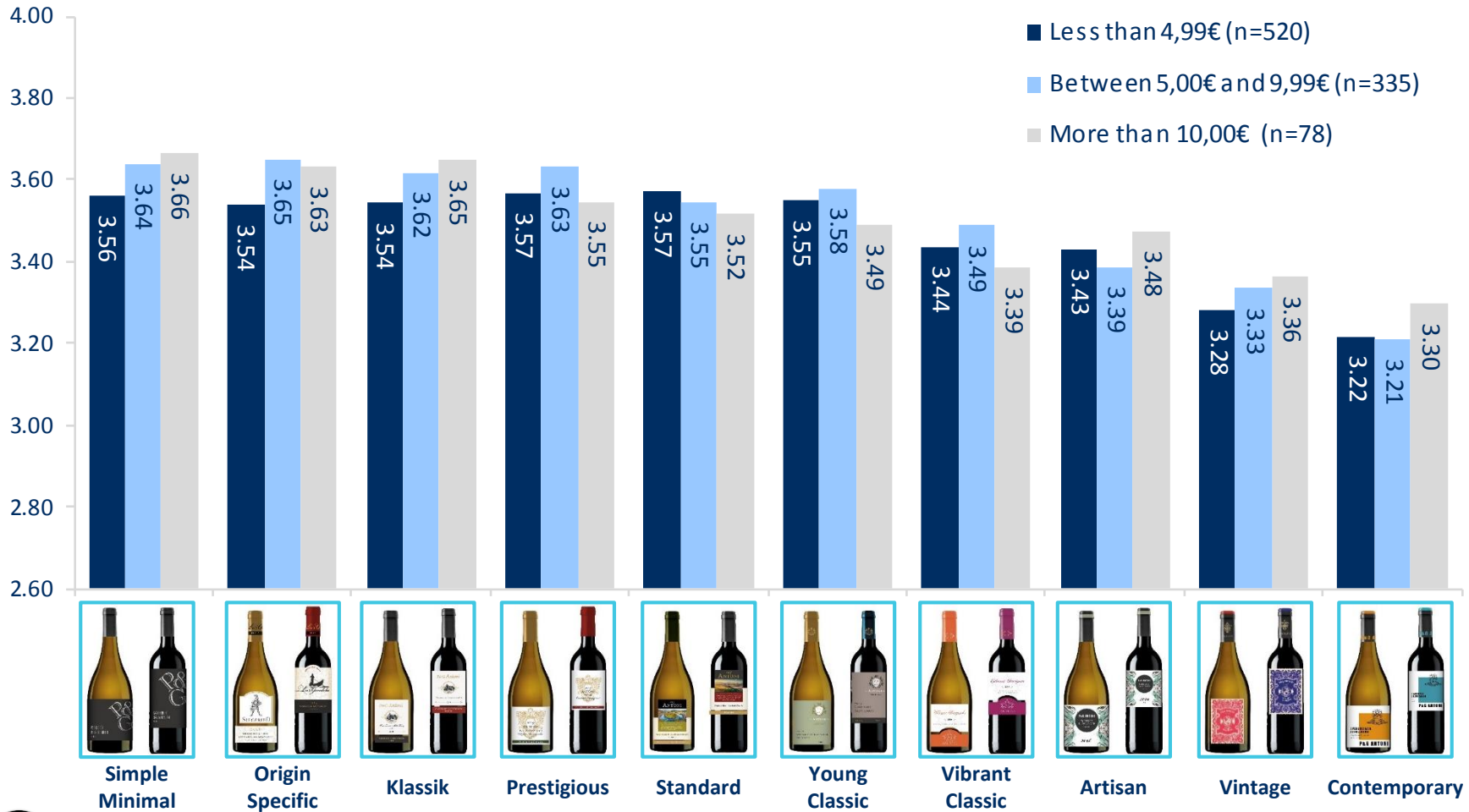


# Perceived quality: By off-trade spend

Quality perceptions among the different spending groups are quite similar for most label types

## Perceived quality of labels: By spend on a bottle of wine as a relaxing drink at the end of the day at home

Mean calculated score out of 5, where 1=very low quality, and 5=very high quality

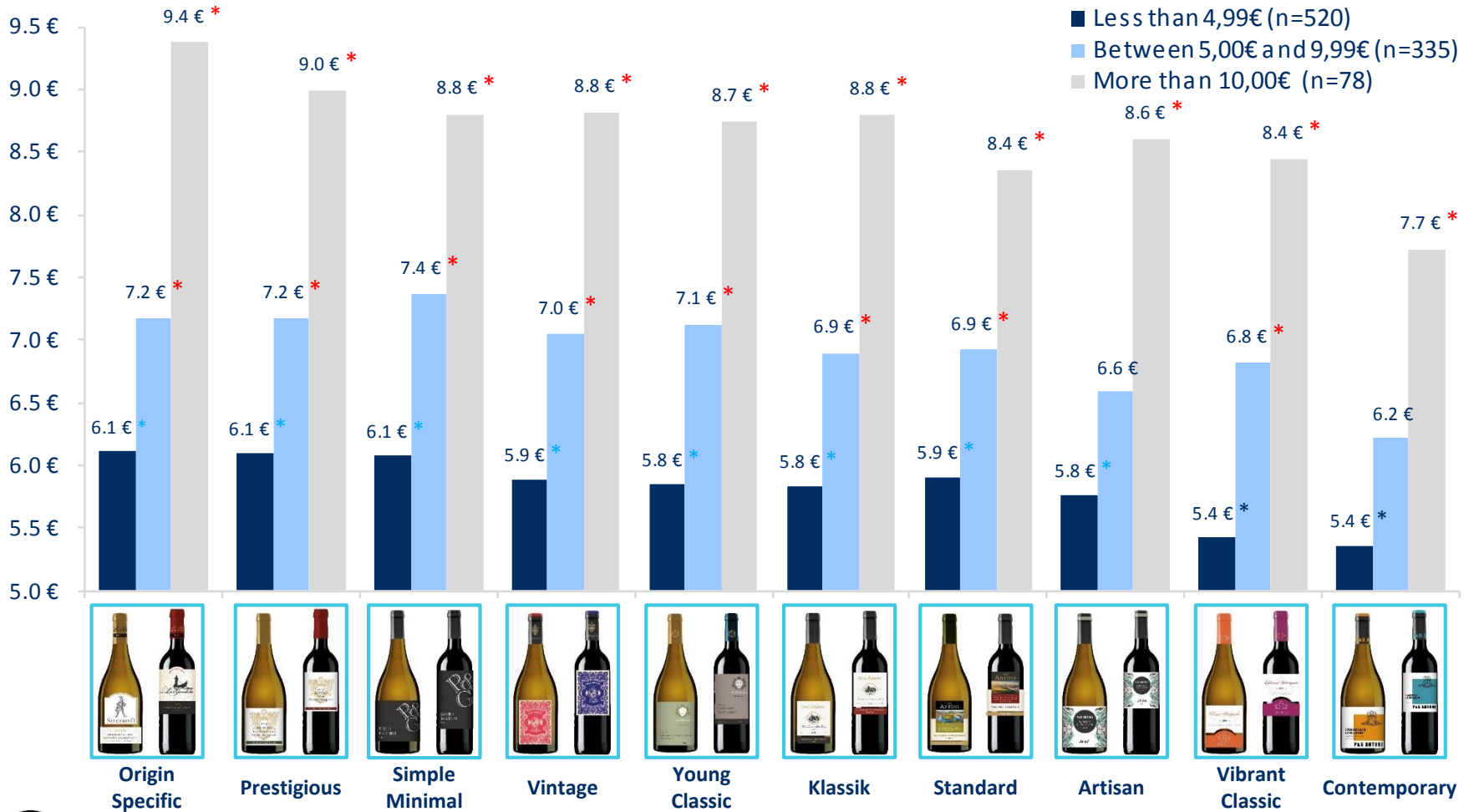


# Expected average price: By off-trade spend

The spending of the three groups is reflected on the expected average price for each of the labels

## Expected average price: By spend on a bottle of wine as a relaxing drink at the end of the day at home

Calculated average, from a scale of 8 given price brackets, respondents would expect the bottle of wine to cost at the store where they typically buy wine



Germany Label Design 2018

\*/\*: Statistically significantly higher/lower than all German regular wine drinkers at a 95% confidence level. Source: Wine Intelligence, Vinitrac® Germany, Oct'17 (n=1,000), German regular wine drinkers



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The data presented in this report is the result of a comprehensive consumer research approach including focus groups and a quantitative survey

- With a wide variety of wine label designs in the German market, one of the main challenges for this study was to decide on the different label categories that covered most (if not all) the bases
- We started the study with an evaluation of the current wine labels available in the German wine market. Partnering with the label design and marketing agency, Quantum X, we selected 40 existing label designs which we considered to be representative of the label designs in the German market
- We tasked consumer focus groups in Munich, Cologne and Hamburg to group together the 40 label designs into different categories based on what they felt were similar types of labels and we also explored their perceptions and views of different wine labels. From this qualitative study we identified 10 label design categories. Quantum X then set-out to design these to be tested in a quantitative study.
- In October 2017, the 10 label types were tested using our Vinitrac<sup>®</sup> survey using a sample of 1,000 respondents which are representative of all German regular wine drinkers. We used 8 measures to assess consumer's perception of the different wine label categories: label stand-out, label attractiveness, average price expectations, quality expectations, likelihood to buy, off-trade occasions and imagery associations



- Data collection:
  - The data for this report was collected in October 2017
  - Data was gathered via Wine Intelligence’s Vinitrac® Germany online survey and is representative of all German regular wine drinkers
  - Sampling: quotas / stratified
  
- 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
  - The survey was post-weighted in terms of age, gender and region
  
- Sample distribution:
  - The distribution of the sample is shown in the table:

Germany		
		Oct-17
	<i>Sample size=</i>	1000
Gender	Male	43%
	Female	58%
	<i>Total</i>	100%
Age	18 - 24	4%
	25 - 34	12%
	35 - 44	16%
	45 - 54	22%
	55+	46%
	<i>Total</i>	100%
Region	Nordrhein-Westfalen	19%
	Bayern	17%
	Baden-Württemberg	15%
	Sachsen + Sachsen-Anhalt + Thüringen	11%
	Niedersachsen + Bremen	10%
	Hessen	7%
	Rheinland-Pfalz + Saarland	6%
	Schleswig-Holstein + Hamburg	6%
	Mecklenburg-Vorpommern + Brandenburg	5%
Berlin	4%	
	<i>Total</i>	100%

Source: Wine Intelligence, Vinitrac® Germany, Oct'17 (n=1,000), German regular wine drinkers



## How does Vinitrac® work?

### 1) 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)

### 2) 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

### 3) 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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# WI wine label categories in the German market



Prestigious



Klassik



# WI wine label categories in the German market



Standard



Young Classic



# WI wine label categories in the German market



Vibrant Classic



Contemporary





# WI wine label categories in the German market



Simple Minimal



Artisan



# WI wine label categories in the German market



Origin Specific



Vintage



# Wine Intelligence Ltd Terms and Conditions of Licence for Syndicated Research Products – key sections

## Definitions and Interpretation

The “Agreement” means the Agreement between Wine Intelligence Ltd and the Customer to provide a Licence for the use of the Syndicated Research Report(s) for Fees on these terms and conditions of business and as set out in a Proposal and the Acceptance of Proposal

“WI” is Wine Intelligence Ltd, trading as Wine Intelligence.

“Customer” means the person or entity purchasing the Licence for the use of the Syndicated Research Report(s)

“Proprietary Information” means all information contained in the Syndicated Research Report(s) and associated briefings or presentations by WI, plus all logos, Processes, third party data and formats contained therein

“Licence” means the Customer’s right to use, store, retrieve and disseminate the Syndicated Research Report(s), as defined by the Agreement

“Acceptance of Proposal” means the document provided by the Customer to WI confirming the terms of engagement of WI to provide the Customer with the Licence for the use of the Syndicated Research Report(s)

“Fees” means the fees payable by the Customer to WI, as set out in the Contract, plus VAT at the current rate, subject to exemptions as set out in UK and EU law

“Processes” means any research processes, techniques and methodologies used in the creation of the Syndicated Research Report(s)

“Proposal” means the specification of the Syndicated Research Report(s) by WI to the Customer

“Syndicated Research Report” means a written document containing Wine Intelligence copyright materials such as data, information, insight, commentary, either written, oral, video, or audio and, where appropriate, copyright materials of a Third Party that have been reproduced by permission

“Representative organization” means any body, association, trading group, generic organization or any other coalition of interested parties, howsoever constituted, that acts on behalf of a broader group of stakeholders

“Subscription Products” means Syndicated Research Reports delivered to the Customer periodically as part of an ongoing Agreement

## 1. Engagement

The Customer engages WI to provide the Syndicated Research Report(s), and WI agrees to do so upon the terms of the Agreement for payment of the Fees.

The Fees for the Syndicated Research Reports shall be priced in Pounds Sterling. WI will publish indicative prices in Euros, US Dollars, US Dollars, Canadian Dollars from time to time, and the Customer will have the opportunity to pay for Syndicated Research Reports using these currencies. Should the Customer opt for this form of payment the exact amount payable will be based on the prevailing exchange rate at the time of the execution of the Agreement.

## 2.. Copyright

2.1 The Copyright in the Syndicated Research Report(s) shall at all times vest with WI. The copyright in all artwork, data and copy for each element of the report created and assembled by WI shall at all times remain the property of WI.

2.2 All copyright and any other intellectual property rights in any material produced supplied or made available by a third party to WI for inclusion in the Syndicated Research Report shall remain the property of the third party. The Customer warrants its title to WI, except as may be expressly disclosed in writing, and agrees to indemnify WI against any claims by third parties in respect of any infringement of their copyright or other intellectual property rights.

2.3 WI asserts to the Customer its moral right to be identified as the author of the Syndicated Research Report in accordance with the UK Copyright Designs and Patents Act 1988 Section 77 and 78, and shall be entitled to hold itself out as the author of the Syndicated Research Report (and in particular the research undertaken in the process of completing the Syndicated Research Report) as part of WI’s own general marketing activities. WI shall be entitled to publish the name of the Customer in association with the Syndicated Research Report(s) as part of this general marketing activities.

2.4 The copyright in the Processes used to execute the Syndicated Research Report shall remain the property of WI throughout.

## 3. Licence

3.1 WI grants to the Customer under the Agreement a non-exclusive Licence in perpetuity to store and retrieve an electronic version of the Syndicated Research Report(s)

3.2 The Customer is entitled to disseminate the Syndicated Research Report(s) within its immediate organization, including organizations affiliated by majority shareholdings, legally liable partnerships, or other majority ownership structure

3.3 If the Customer is a Representative organization, the entitlement outlined in Clause 7.2 DOES NOT extend to parties who hold membership or similar interest in the Representative organization, except by specific written permission from WI and the payment of further Fees associated with a Multi-User Licence

3.4 The Customer is entitled to extract elements of the Syndicated Research Report and re-use them for internal and external presentations, subject to the doctrine of Fair Use

3.5 At all times the Customer must identify any information extracted from the Syndicated Research Report in 7.5 above as being from WI

## 4. Warranties

No advice or information whether oral or written provided by WI to the Customer through the Syndicated Research Report(s) shall create any warranty not expressly stated in this Agreement.

The Client warrants and undertakes to abide by the UK Copyright Designs and Patents Act 1988 Section 77 & 78, and undertakes to obey the copyright restrictions on any materials received as part of this Agreement.

Please contact Wine Intelligence for full terms and conditions



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