



WINE INTELLIGENCE

WINE LABEL DESIGN: AUSTRALIAN MARKET

DECEMBER 2020



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INTRODUCTION

What is a wine label for? Beyond the legal requirements that must be met for a product to be sold, a wine's label is the canvas by which a producer can convey feelings, ideas and associations. These feelings are crucial at two moments in a wine's life. The first, when picking a product up from a crowded shelf, requires the label to stand out and be noticed – in a positive way. The second, at a consumption occasion, requires the label to fit with the mood and support the role that the wine is destined to play in that occasion.

Given the complexity of these demands, it is little wonder that label design carries such importance in the wine category, far more than many producers (and consumers) would like to admit. The wine industry may convince itself that the underlying quality of a product will normally be a good guide to its success in a competitive marketplace. However, what happens if several products meet a perceived quality threshold? If other purchase cues, such as price and wine style are also similar, what wins the sale? In the end, when there is no other differentiating factor, the label may prove to be the X factor.

The language of labels, and what consumers are looking for, is becoming more familiar to the more astute brand owners around the world. This, the first of our new-look Label Design Reports, focused on the Australian market, showcases new

archetype designs prepared by Amphora Design, a leading wine label design house.

The first impression of the findings of this report may give some readers pause. Wine consumers in Australia (and elsewhere) are generally seeking reassurance in what they buy and drink. There is an innate reluctance to buy into the avant-garde, and a natural affinity to what one might classify as 'old school' wine values. Aggressive designs might achieve standout on shelf, the first of the requirements for success as outlined above. And yet they may stumble when it comes to the second – the fit with consumer needs. Thus, the label designer must tread a careful path. Distinctiveness wins attention, but it must reassure, that is be 'central' to the category conventions, to win the order.

Fortunately, there is some room for creativity. As this report demonstrates, not all consumer segments see labels in the same light. Crucially, and shown for the first time in this new-look report, there is also a difference between designs for red and white wine. Consumer preferences seem to be more heterogenous when it comes to white wines compared with red wines. This may arise from the type of consumer that tends to buy white more than red; equally, it seems influenced in part by the role that a red wine might need to play – more typically with food, and possibly more likely in a social setting.

WINE INTELLIGENCE WINE LABEL CATEGORIES IN THE AUSTRALIA MARKET



From our research, wine labels in Australia can be classified into 14 categories



Prestige



Stately Classic



Classic Text



Simple Bold



Elegant



Modern Graphic



Artisan / Vintage

WINE INTELLIGENCE WINE LABEL CATEGORIES IN THE AUSTRALIA MARKET



From our research, wine labels in Australia can be classified into 14 categories



Boutique



Distinctive



Bold Text



Surrealist



People



Simple Contemporary



Bright

Questions asked in the Wine Intelligence Vinitrac® in Vinitrac Australia, October 2020 amongst 1,000 Australian regular wine drinkers* (drink wine at least once per month)

1 Appeal

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

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

How much would you expect each of these bottles of wine to cost at the store where you typically buy wine?

4 Quality expectations

What would you expect the quality of each of these wines to be?

5 Imagery

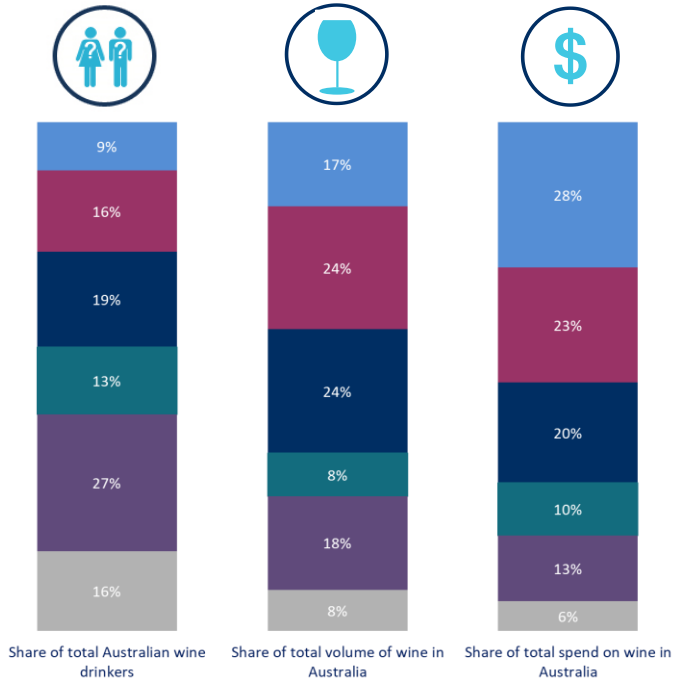
Below you will see a list of statements and words that could be used to describe each wine. Please indicate which words or statements below you think are the most appropriate to describe each bottle

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

SEGMENT DEFINITIONS



WINE INTELLIGENCE AUSTRALIAN PORTRAITS



Engaged Explorers: Frequent and involved wine drinkers, high spenders typically in their 30s and 40s



Social Newbies: Youngest segment, more likely to drink wine in on-premise and social settings and seek advice



Mainstream Matures: Over-45s with high levels of wine knowledge, more value-oriented



Contented Treaters: Younger, female biased, low-frequency wine drinkers who tend to spend a bit more



Social Bargain Hunters: Older, knowledgeable drinkers purchasing a narrow repertoire at low prices



Kitchen Casuals: Infrequent wine drinkers who tend to look for lowest prices in a limited repertoire

AGE COHORTS

Gen-Z: Regular wine drinkers aged 18-24

Millennial: Regular wine drinkers aged 25-39

Gen-X: Regular wine drinkers aged 40-54

Boomer: Regular wine drinkers aged 55+

Net index scores calculated as follows:

- **Net label appeal = % consumers who found the label design more appealing minus % consumers who found the label design less appealing**
- **Net quality expectation = % consumers who found the label design high quality minus % consumers who found the label design low quality**
- **Net intent to purchase = % consumers who would be more likely to purchase the label design minus % consumers who would be less likely to purchase the label design**

Label designs with higher net scores are coded in shades of green and those with lower net scores coded in shades of red

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KEY FINDINGS: **RED** LABEL DESIGNS PERFORMANCE (1/2)



Ranking based on net intent to purchase



	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	57	2nd	51	3rd	47	4th	41	5th	38	=6th	35	=6th	35
Net label appeal	=2nd	67	=2nd	67	5th	61	1st	71	6th	50	4th	65	8th	48
Net quality expectation	1st	85	3rd	62	2nd	67	5th	55	6th	54	7th	52	9th	48
Price expectation	1st	\$19.08	8th	\$17.17	2nd	\$17.66	6th	\$17.25	5th	\$17.26	10th	\$16.85	9th	\$16.99

KEY FINDINGS: **RED** LABEL DESIGNS PERFORMANCE (2/2)



Ranking based on net intent to purchase



	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	=8 th	31	=8 th	31	10 th	29	11 th	22	12 th	20	13 th	19	14 th	18
Net label appeal	=12 th	33	7 th	49	9 th	45	11 th	37	=12 th	33	14 th	31	10 th	38
Net quality expectation	=10 th	46	12 th	44	4 th	58	8 th	50	=10 th	46	13 th	34	14 th	30
Price expectation	7 th	\$17.23	11 th	\$16.83	3 rd	\$17.49	4 th	\$17.38	12 th	\$16.76	13 th	\$16.11	14 th	\$15.79

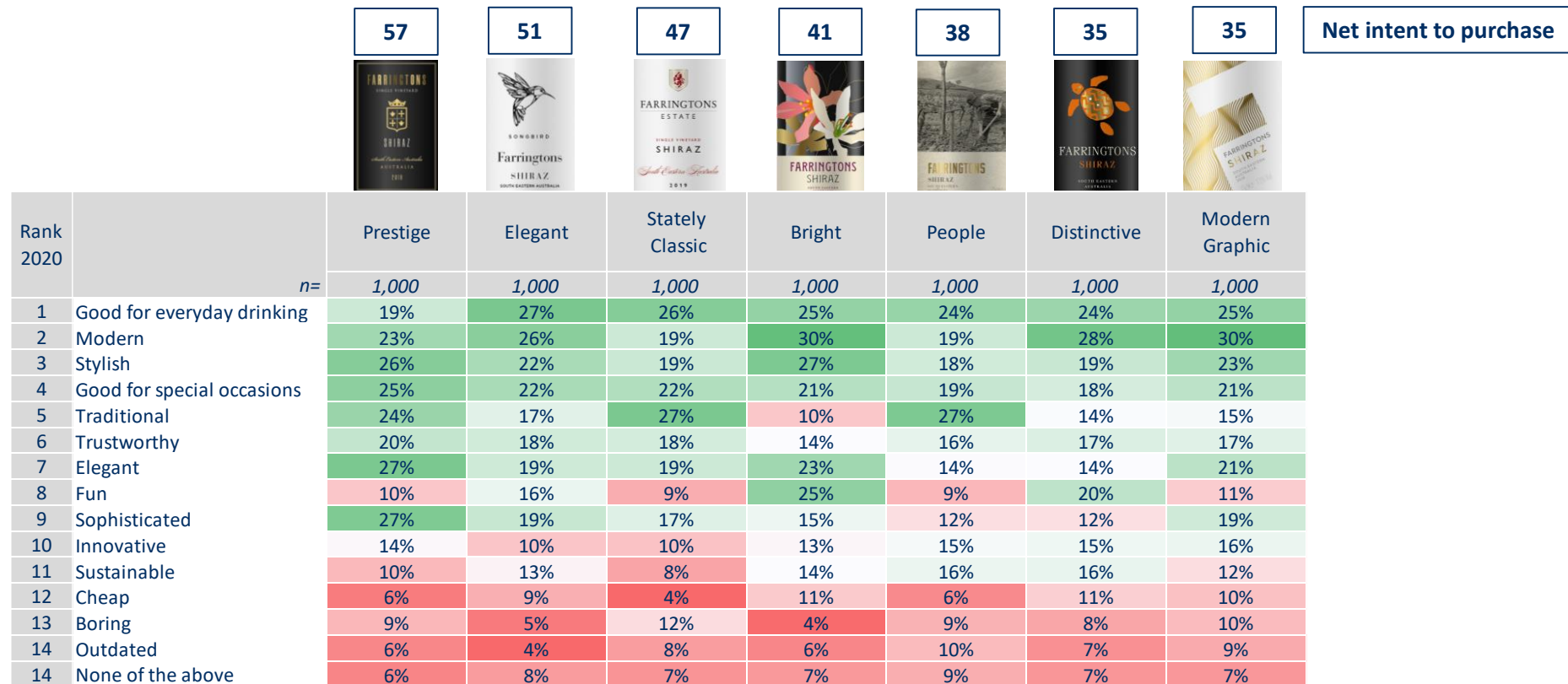
KEY FINDINGS: **RED** LABEL DESIGNS IMAGERY



More successful labels for red wine tend to combine a sense of tradition, elegance and stylishness

Label imagery: **Red** label designs (1/2)

% who associated the following statements with each label
Base = All Australian regular wine drinkers (n=1,000)



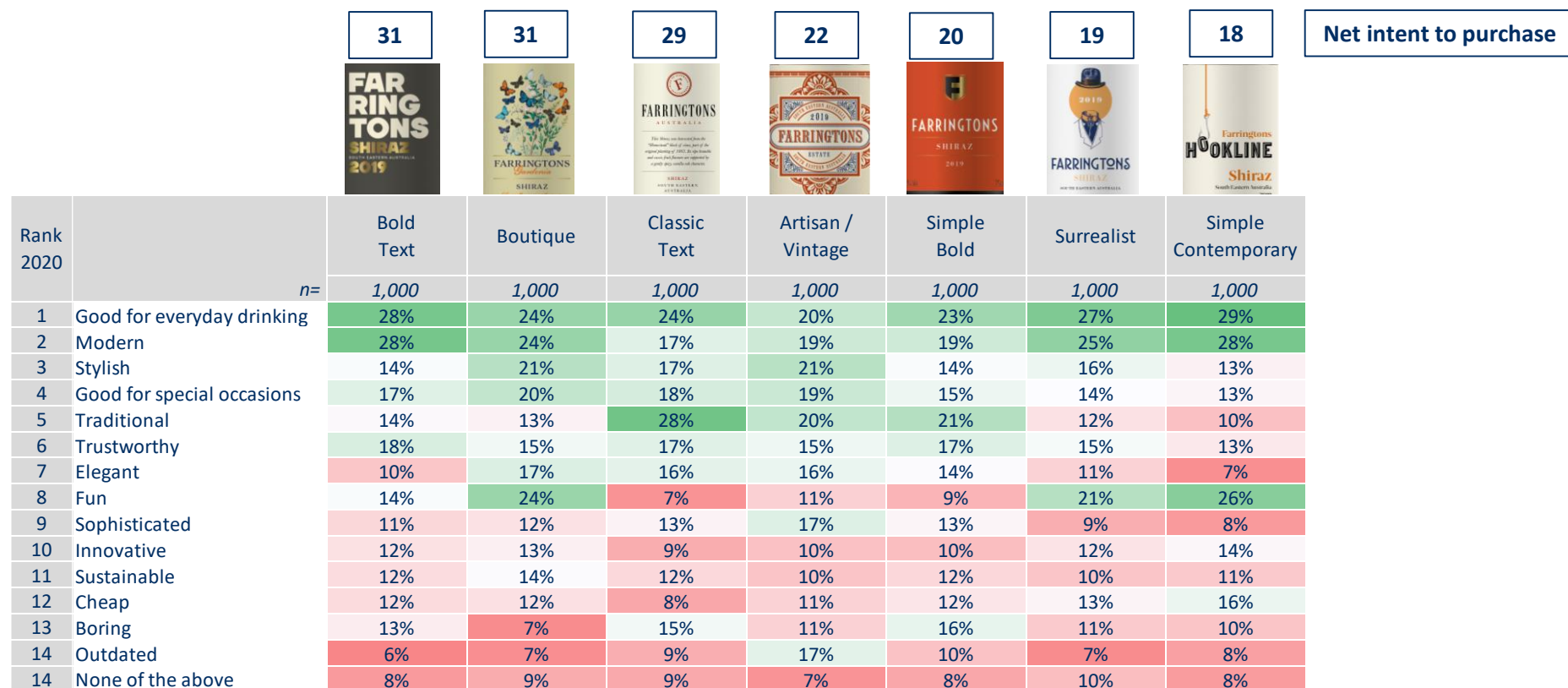
KEY FINDINGS: **RED** LABEL DESIGNS IMAGERY



Labels that score less well on trust, elegance and sophistication tend to struggle to achieve strong likelihood to buy scores for red wine

Label imagery: **Red** label designs (2/2)

% who associated the following statements with each label
Base = All Australian regular wine drinkers (n=1,000)



KEY FINDINGS: WHITE LABEL DESIGNS PERFORMANCE (1/2)



Ranking based on net intent to purchase



	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	35	=1st	35	3rd	33	4th	32	5th	28	6th	24	7th	22
Net label appeal	1st	74	4th	56	2nd	65	6th	51	3rd	60	5th	55	9th	40
Net quality expectation	4th	48	1st	63	3rd	50	2nd	52	5th	47	8th	38	6th	43
Price expectation	3rd	\$17.07	1st	\$18.03	5th	\$16.86	2nd	\$17.22	6th	\$16.85	10th	\$16.28	8th	\$16.63

KEY FINDINGS: WHITE LABEL DESIGNS PERFORMANCE (2/2)



Ranking based on net intent to purchase



	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	8th	18	9th	15	10th	11	11th	6	12th	2	13th	-1	14th	-10
Net label appeal	7th	49	8th	44	10th	38	13th	19	11th	26	12th	22	14th	15
Net quality expectation	11th	25	7th	39	9th	31	10th	28	13th	19	12th	22	14th	3
Price expectation	7th	\$16.84	4th	\$17.03	9th	\$16.30	13th	\$15.10	12th	\$15.38	11th	\$15.48	14th	\$15.08

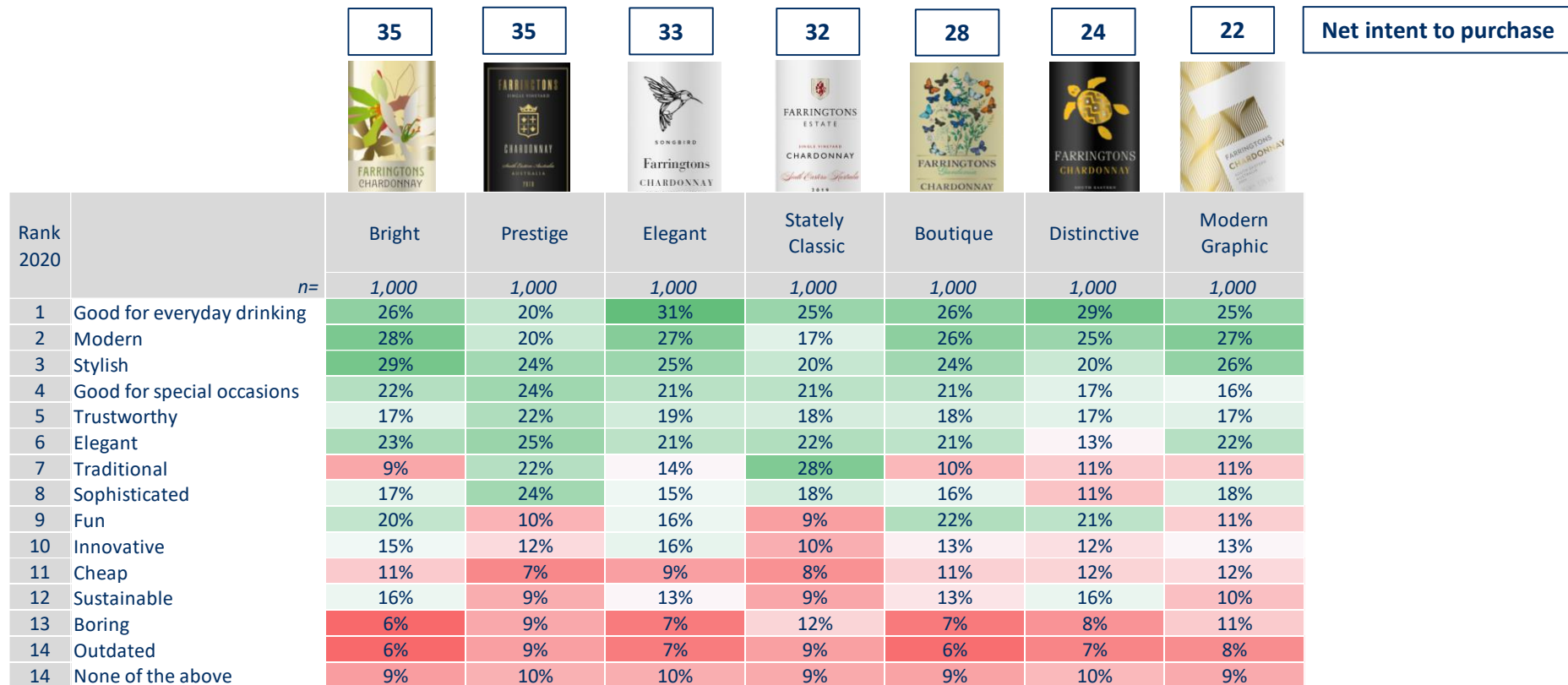
KEY FINDINGS: WHITE LABEL DESIGNS IMAGERY



White wine labels require a feeling of stylish, elegant modernity to be more successful

Label imagery: White label designs (1/2)

% who associated the following statements with each label
Base = All Australian regular wine drinkers (n=1,000)



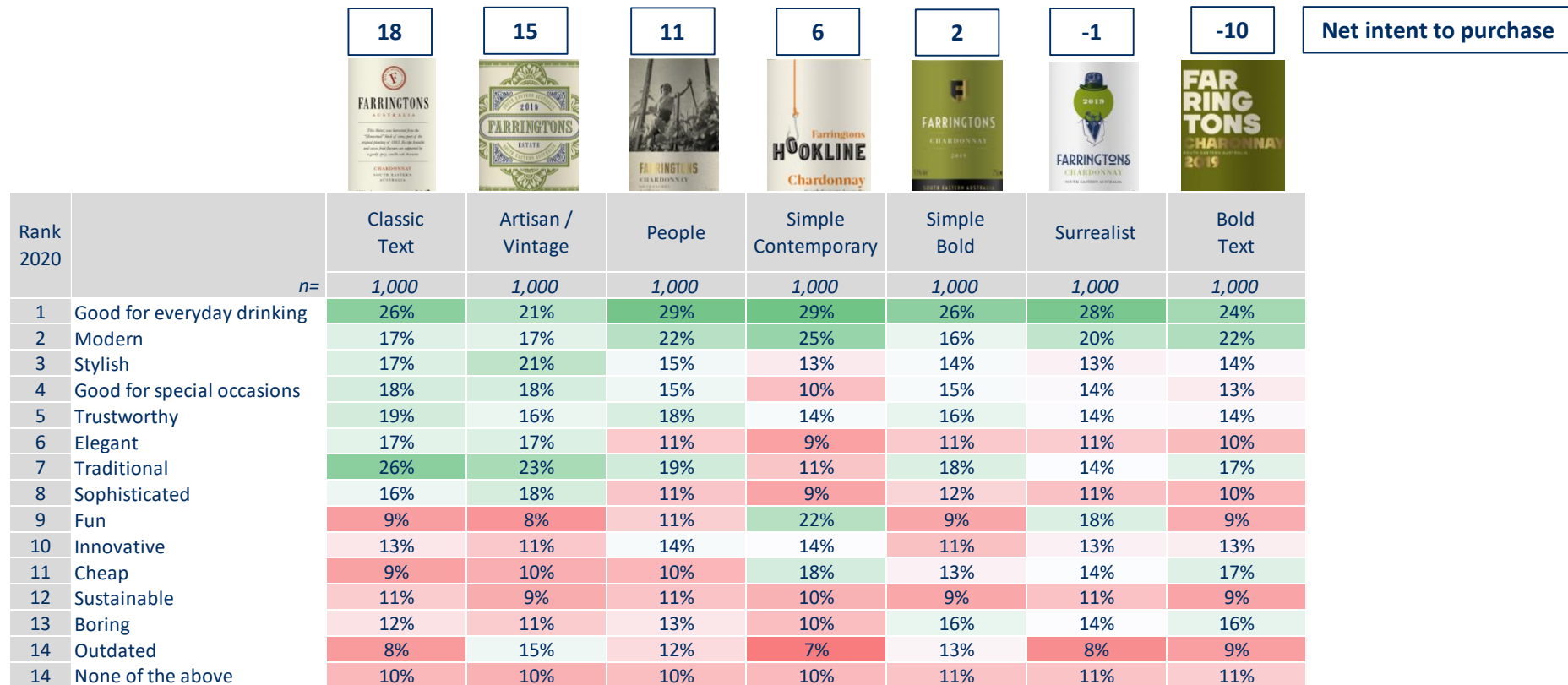
KEY FINDINGS: **WHITE** LABEL DESIGNS IMAGERY



White wine labels that do less well tend to struggle to establish trustworthiness, or a feeling of sophistication

Label imagery: **White** label designs (2/2)

% who associated the following statements with each label
Base = All Australian regular wine drinkers (n=1,000)



KEY FINDINGS: TOP 5 RED AND WHITE LABEL DESIGNS



Ranking based on net intent to purchase



KEY FINDINGS: PRESTIGE LABEL PERFORMANCE



Dominant characteristics:

- **Colour:** Heavy use of metallic colours, 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

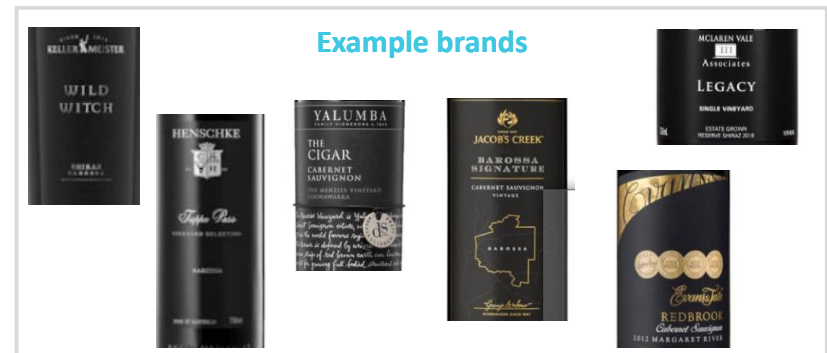


Red	Intent to purchase	Label appeal	Quality expectation	Price expectation
Net score	57	67	85	\$19.08
Rank	1st	=2nd	1st	1st

White	Intent to purchase	Label appeal	Quality expectation	Price expectation
Net score	35	56	63	\$18.03
Rank	=1st	4th	1st	1st

Key associations (Red)	
Elegant	27%
Sophisticated	27%
Stylish	26%

Key associations (White)	
Elegant	25%
Good for special occasions	24%
Sophisticated	24%



KEY FINDINGS: ELEGANT LABEL PERFORMANCE



Dominant characteristics:

- **Colour:** Minimal colour with significant white space dominating the label. If colour is used, it is used as a singular feature of the label
- **Rendering:** Hand-rendered to convey a sense of authenticity and genuineness
- **Image:** Simplistic and often conveys the winery's story. It is a major feature of the label
- **Typography:** Clean, easy-to-read fonts that are predominately black
- **Text:** Focus is on the winery brand, supported by varietal, region and the vintage

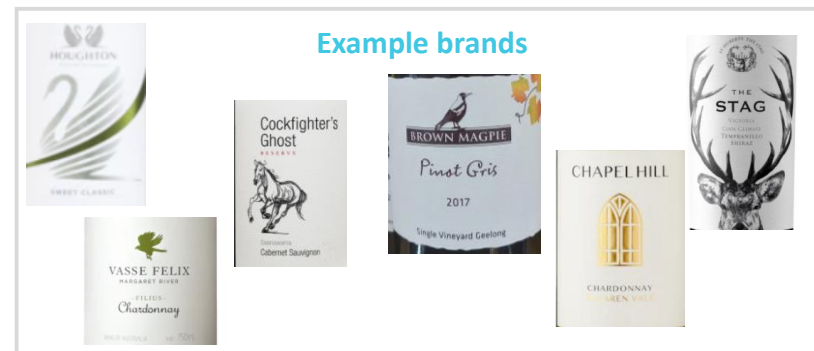


Red	Intent to purchase	Label appeal	Quality expectation	Price expectation
Net score	51	67	62	\$17.17
Rank	2nd	=2nd	3rd	8th

White	Intent to purchase	Label appeal	Quality expectation	Price expectation
Net score	33	65	50	\$16.86
Rank	3rd	2nd	3rd	5th

Key associations (Red)	
Good for everyday drinking	27%
Modern	26%
Stylish	22%

Key associations (White)	
Good for everyday drinking	31%
Modern	27%
Stylish	25%



KEY FINDINGS: STATELY CLASSIC LABEL PERFORMANCE



Dominant characteristics:

- **Colour:** Limited colour palette: predominantly white label with black detail and a brighter accent colour such as red
- **Rendering:** If used, line drawings typically simple and relatively small. Embossing may be used to add a classic feel
- **Image:** Very few images used, but occasionally landscapes, especially vineyards or estates
- **Typography:** Mainly black font, but some use of brighter accent colours (typically highlighting the brand or varietal). Serif and cursive fonts, some use of italics, capital letters and numbers
- **Text:** Presence of text used to add visual perception of quality. Wine name and varietal dominate

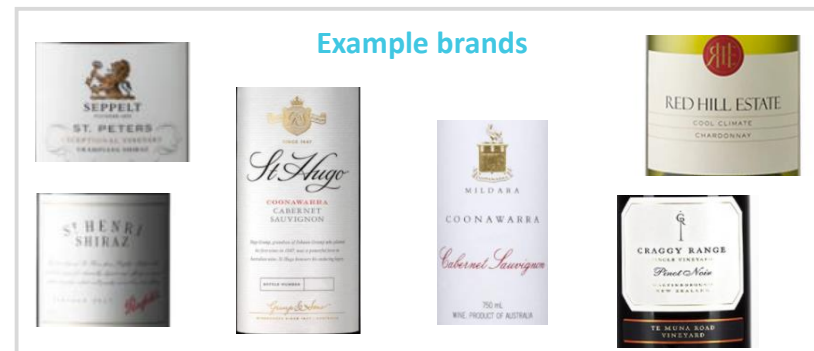


Red	Intent to purchase	Label appeal	Quality expectation	Price expectation
Net score	47	61	67	\$17.66
Rank	3rd	5th	2nd	2nd

White	Intent to purchase	Label appeal	Quality expectation	Price expectation
Net score	32	51	52	\$17.22
Rank	4th	6th	2nd	2nd

Key associations (Red)	
Traditional	27%
Good for everyday drinking	26%
Good for special occasions	22%

Key associations (White)	
Traditional	28%
Good for everyday drinking	25%
Elegant	22%



KEY FINDINGS: BRIGHT LABEL PERFORMANCE



Dominant characteristics:

- **Colour:** Very bright colours that are sometimes offset by white labels or colour of bottle and wine (when used for white or rosé wine)
- **Rendering:** Occasional use of line drawings (non-photorealistic rendering) sometimes etched directly onto bottle. Metallic type sometimes used
- **Image:** Images of botanicals or nature often used
- **Typography:** Type of font depends on branding – sans serif, serif and hand-written style all used
- **Text:** Minimal text other than brand, varietal, vintage and region



Red	Intent to purchase	Label appeal	Quality expectation	Price expectation
Net score	41	71	55	\$17.26
Rank	4th	1st	5th	6th

White	Intent to purchase	Label appeal	Quality expectation	Price expectation
Net score	35	74	48	\$17.07
Rank	=1st	1st	4th	3rd

Key associations (Red)		Key associations (White)	
Modern	30%	Stylish	29%
Stylish	27%	Modern	28%
Fun	25%	Good for everyday drinking	26%



KEY FINDINGS: PEOPLE LABEL PERFORMANCE



Dominant characteristics:

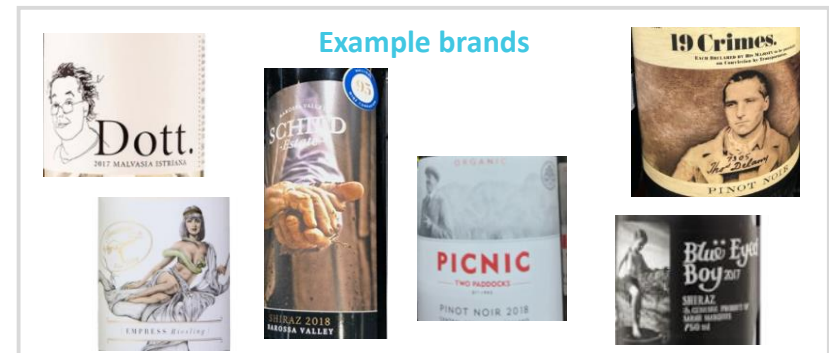
- **Colour:** Natural, realistic colours, sometimes black and white
- **Rendering:** Line drawings primarily used, sometimes photographs
- **Image:** Images of people dominant, mostly single person but sometimes in a group. Very realistic drawings or photographs used
- **Typography:** Type of text used to supplement the image, so dependent on brand and feel of label
- **Text:** Secondary to the image and very basic information conveyed



Red	Intent to purchase	Label appeal	Quality expectation	Price expectation
Net score	38	50	54	\$17.26
Rank	5th	6th	6th	5th

White	Intent to purchase	Label appeal	Quality expectation	Price expectation
Net score	11	28	31	\$16.30
Rank	10th	10th	9th	9th

Key associations (Red)		Key associations (White)	
Traditional	27%	Good for everyday drinking	29%
Good for everyday drinking	24%	Modern	22%
Good for special occasions	19%	Traditional	19%



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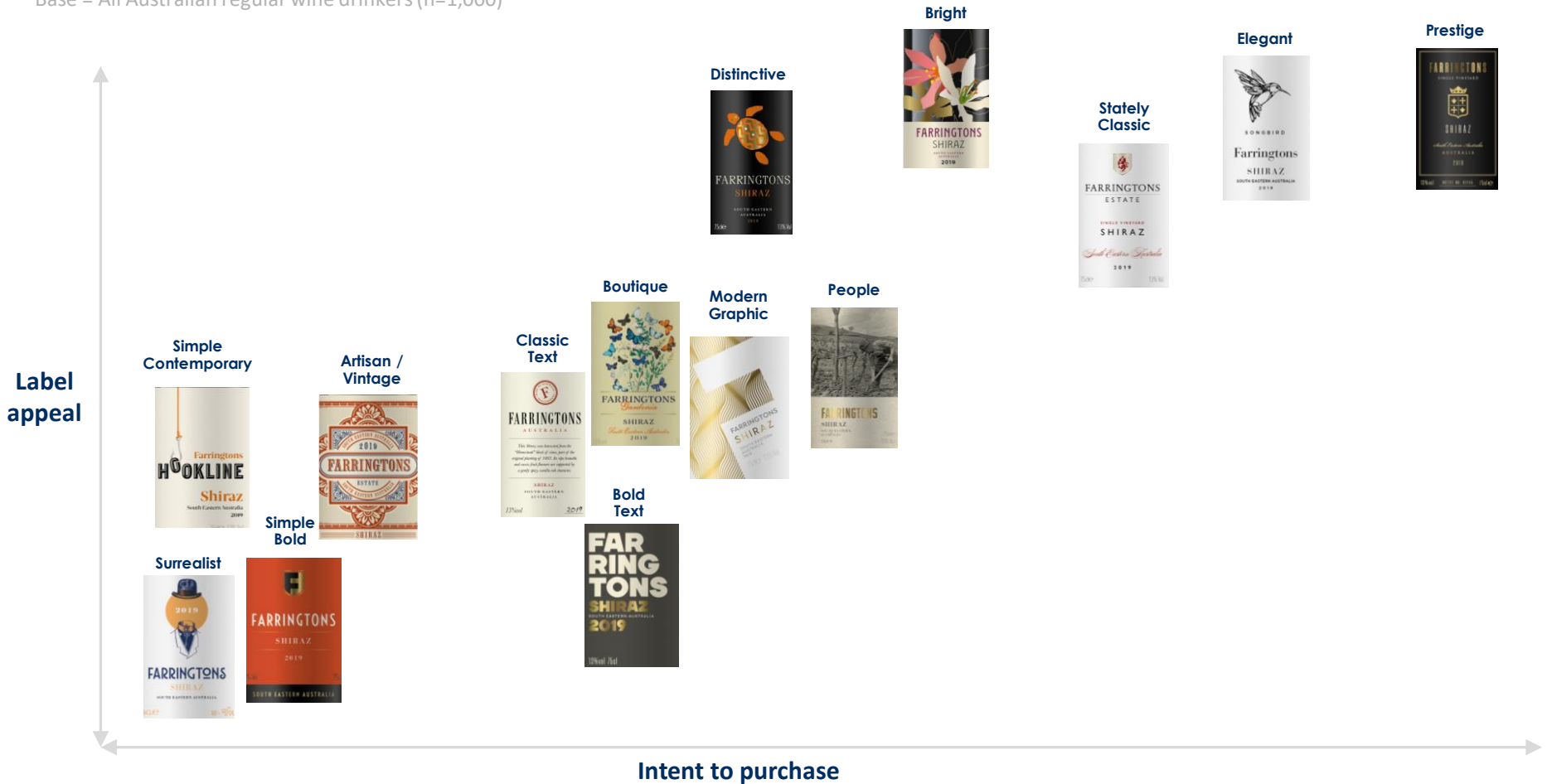
LABEL APPEAL AND INTENT TO PURCHASE – RED WINES



Label designs Prestige, Elegant and Stately Classic are most likely to be purchased

Net label appeal and intent to purchase: **Red** label designs

Base = All Australian regular wine drinkers (n=1,000)



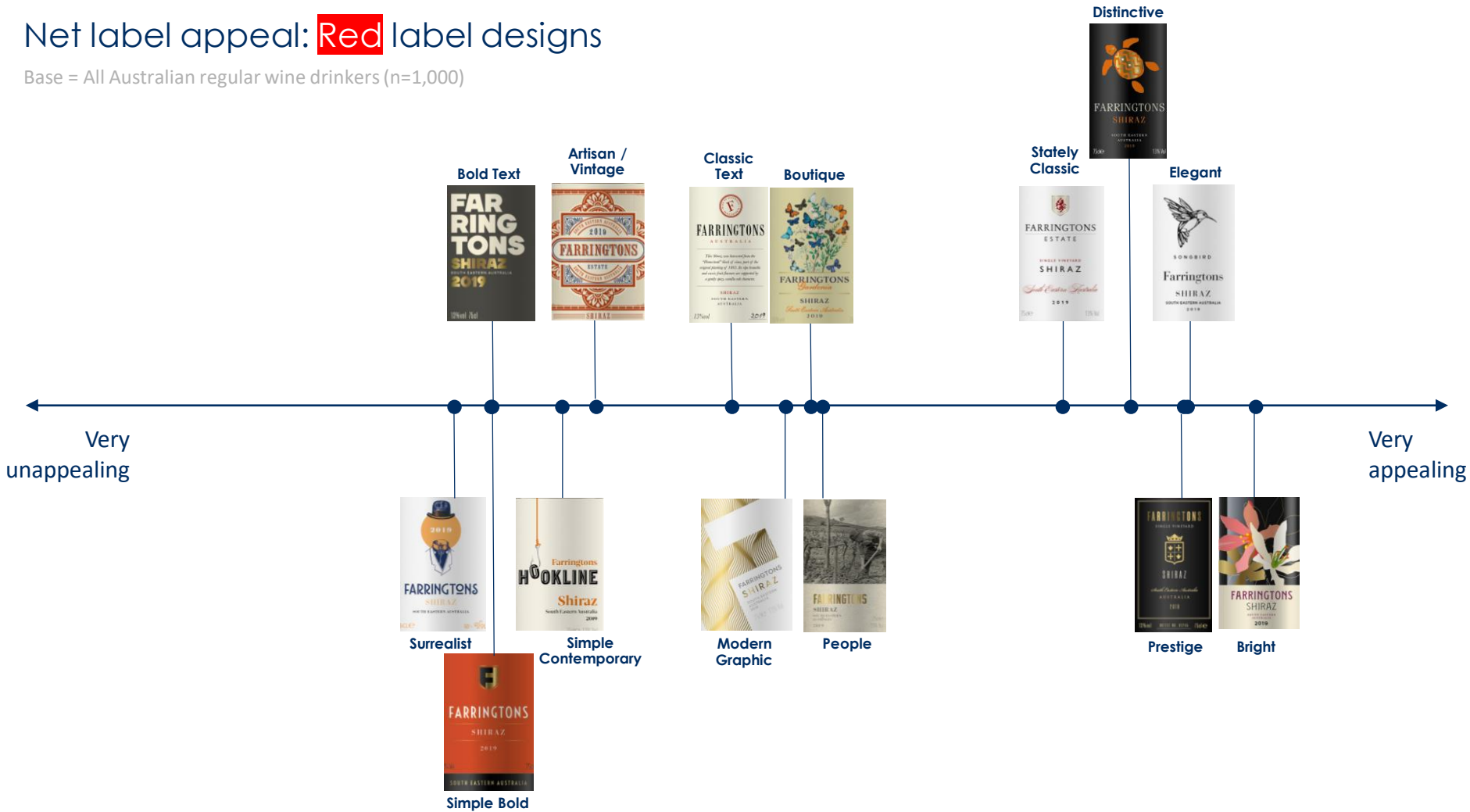
LABEL APPEAL – RED WINES



Two distinct categories emerge for label appeal with some of the more distinctive designs being less appealing for perceived lack of trustworthiness and elegance

Net label appeal: **Red** label designs

Base = All Australian regular wine drinkers (n=1,000)



QUALITY EXPECTATIONS – RED WINES



The Prestige label design stands apart from all others in its ability to convey quality

Net quality expectations: **Red** label designs

Base = All Australian regular wine drinkers (n=1,000)



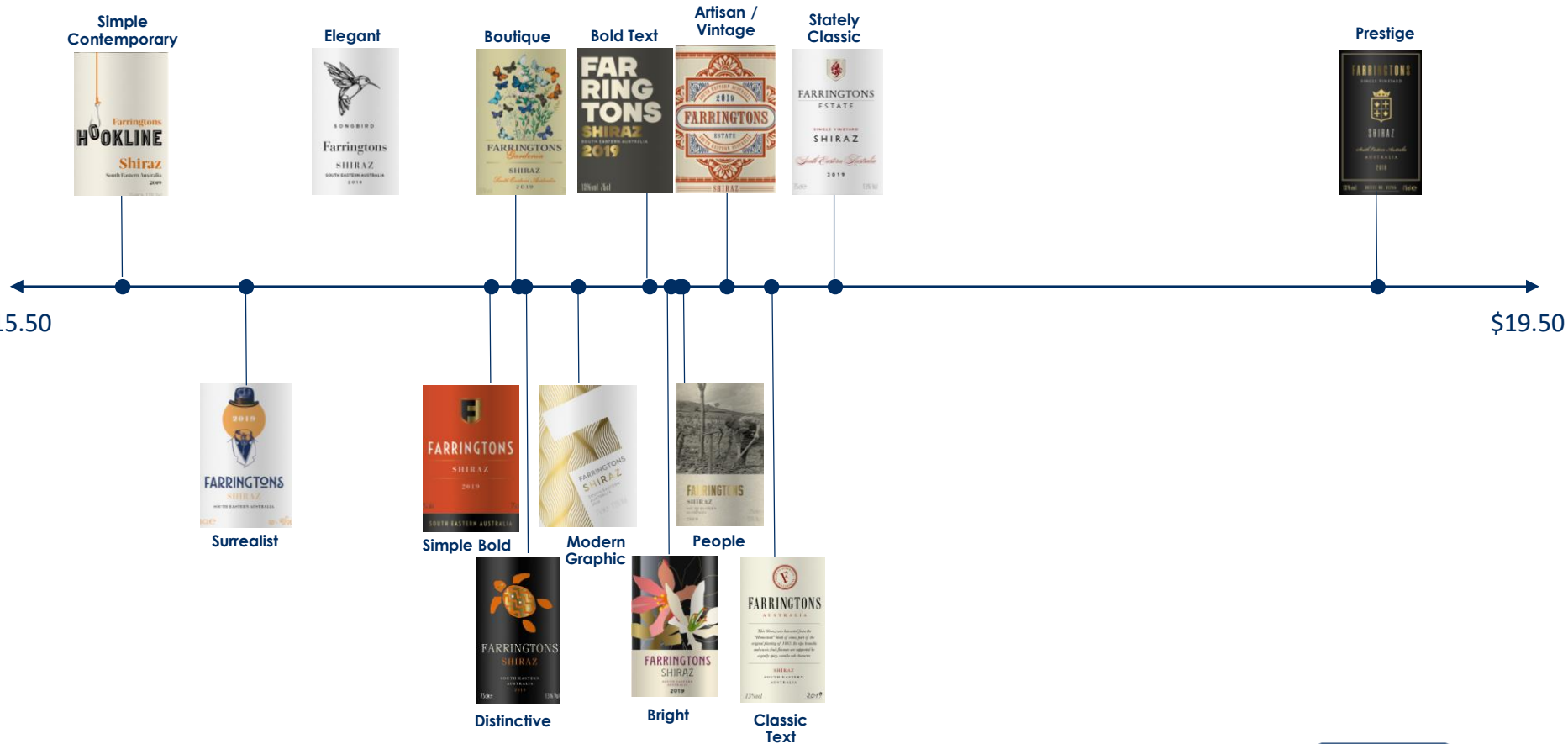
PRICE EXPECTATIONS – RED WINES



In line with the quality expectations, the Prestige label is perceived as the most expensive at around \$19 whilst the majority tend to cluster around the \$17 mark

Price expectations: **Red** label designs

Label designs are shown on a scale based on their average price expectation
 Base = All Australian regular wine drinkers (n=1,000)



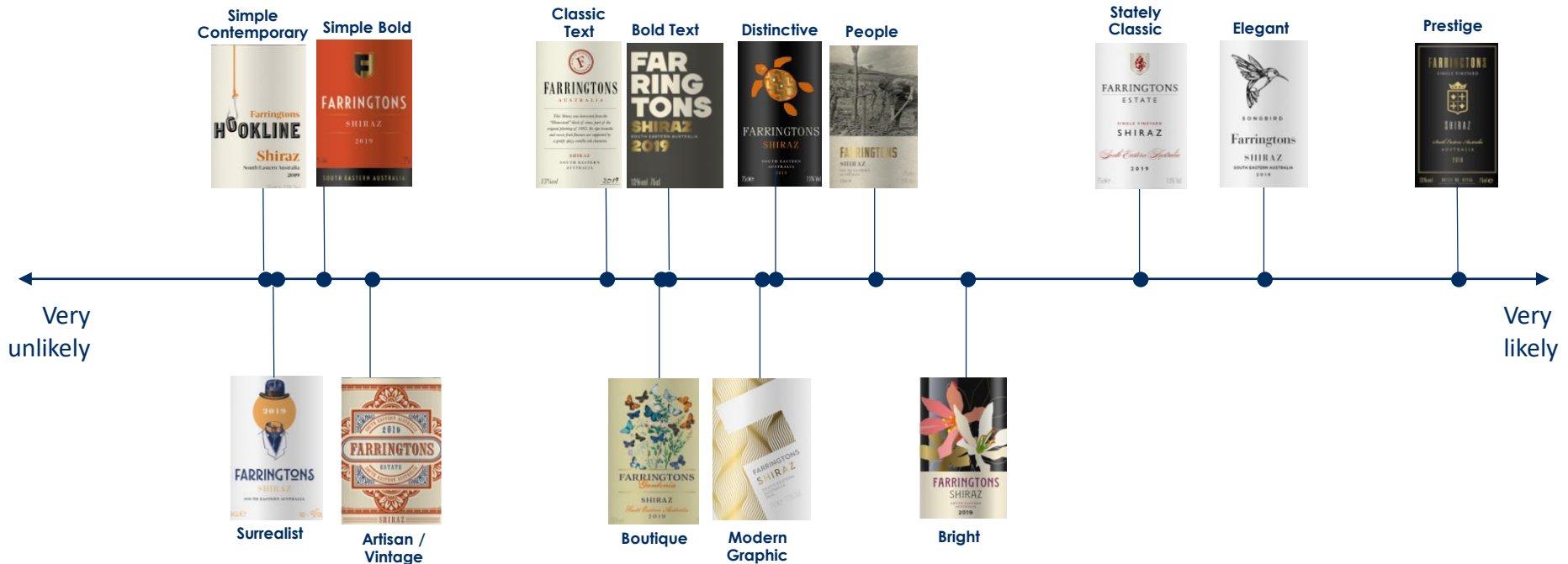
INTENT TO PURCHASE – RED WINES



On the whole, less 'central' (traditional) designs are less likely to be purchased by Australian consumers

Net intent to purchase: **Red** label designs

Base = All Australian regular wine drinkers (n=1,000)

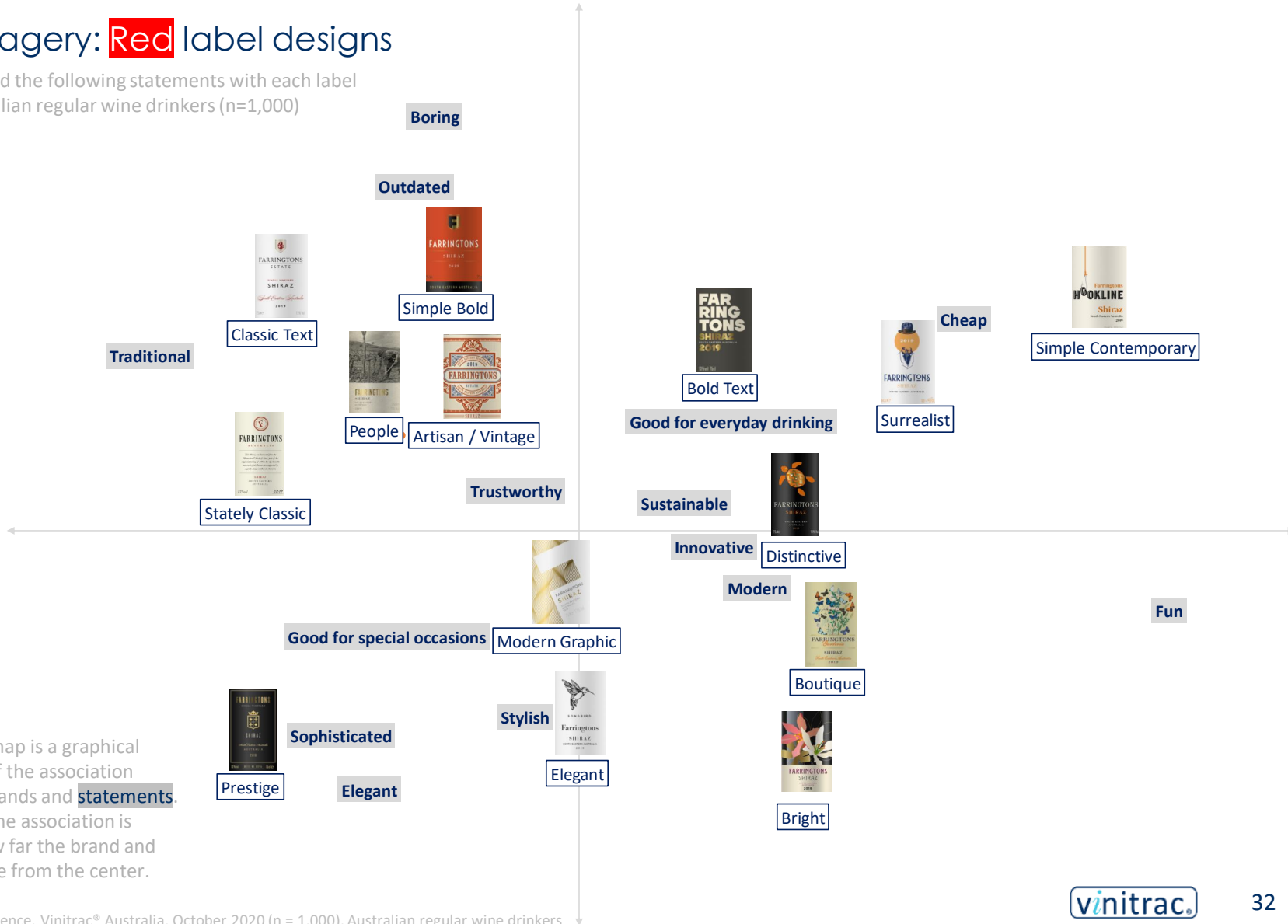


LABEL IMAGERY – RED WINES

Classic and simple designs tend to score well in terms of 'traditional', but this approach can also drive perceptions of being outdated and boring

Label imagery: **Red** label designs

% who associated the following statements with each label
Base = All Australian regular wine drinkers (n=1,000)



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 center.

LABEL APPEAL AND INTENT TO PURCHASE – WHITE WINES



The Bright label design is the most likely to be purchased, though there seems to be more of a tolerance of different approaches to label design for white wines

Net label appeal and intent to purchase: **White** label designs

Base = All Australian regular wine drinkers (n=1,000)



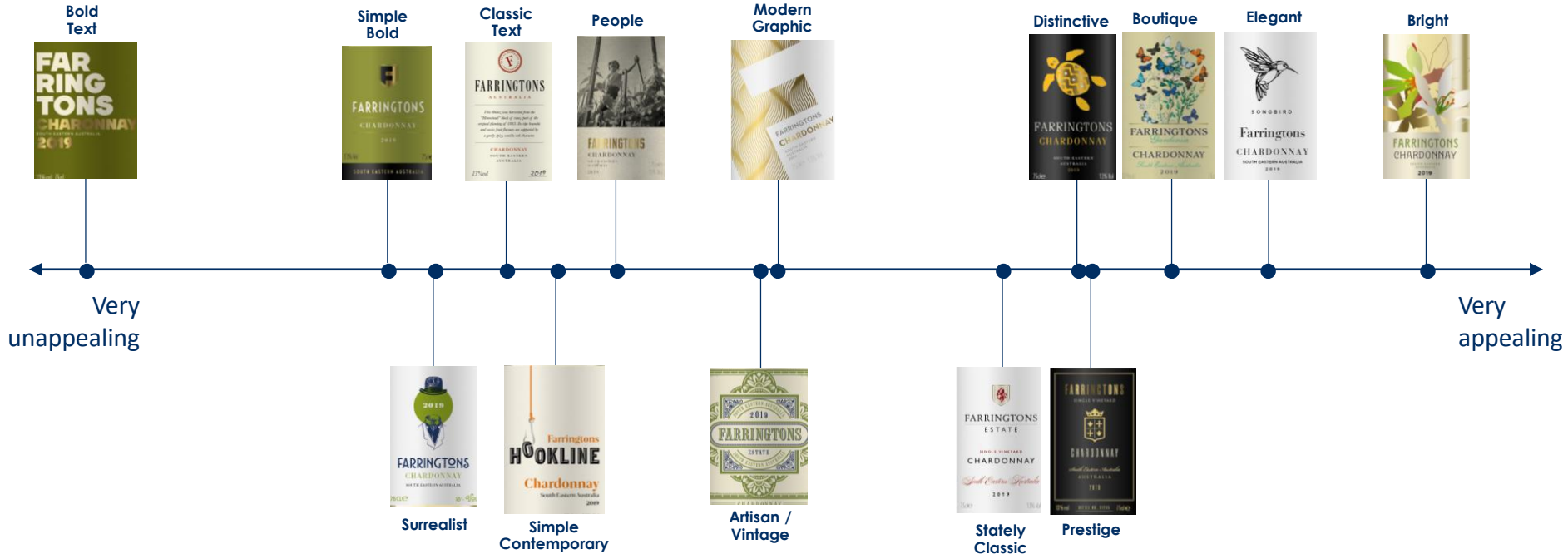
LABEL APPEAL – WHITE WINES



The Bright label design is the strongest performer in terms of appeal, with stylish use of colour also seen positively for white wine labels

Net label appeal: **White** label designs

Base = All Australian regular wine drinkers (n=1,000)



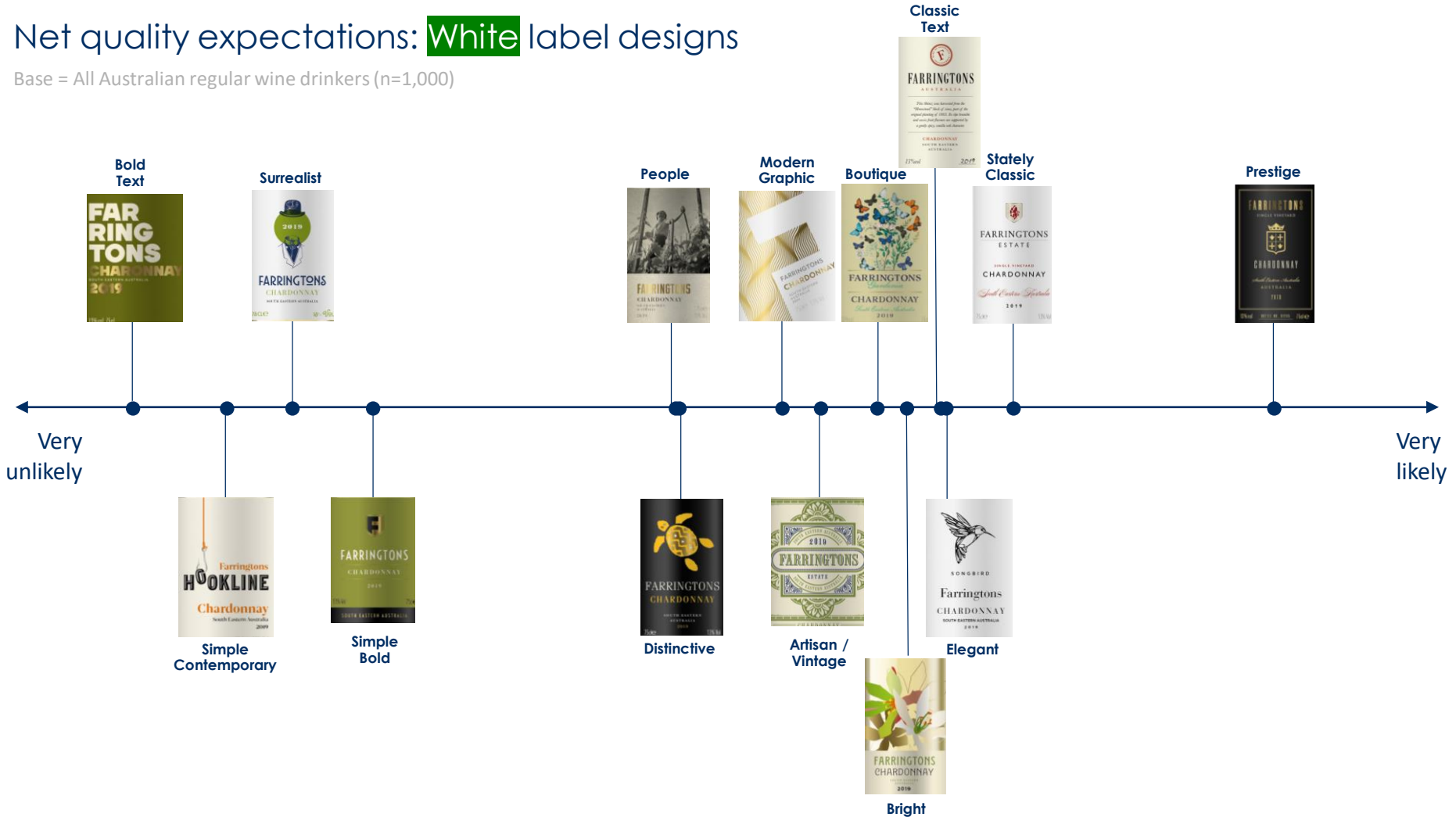
QUALITY EXPECTATIONS – WHITE WINES



Amongst the white label designs tested, the Prestige label outperforms others in terms of net quality perception

Net quality expectations: **White** label designs

Base = All Australian regular wine drinkers (n=1,000)



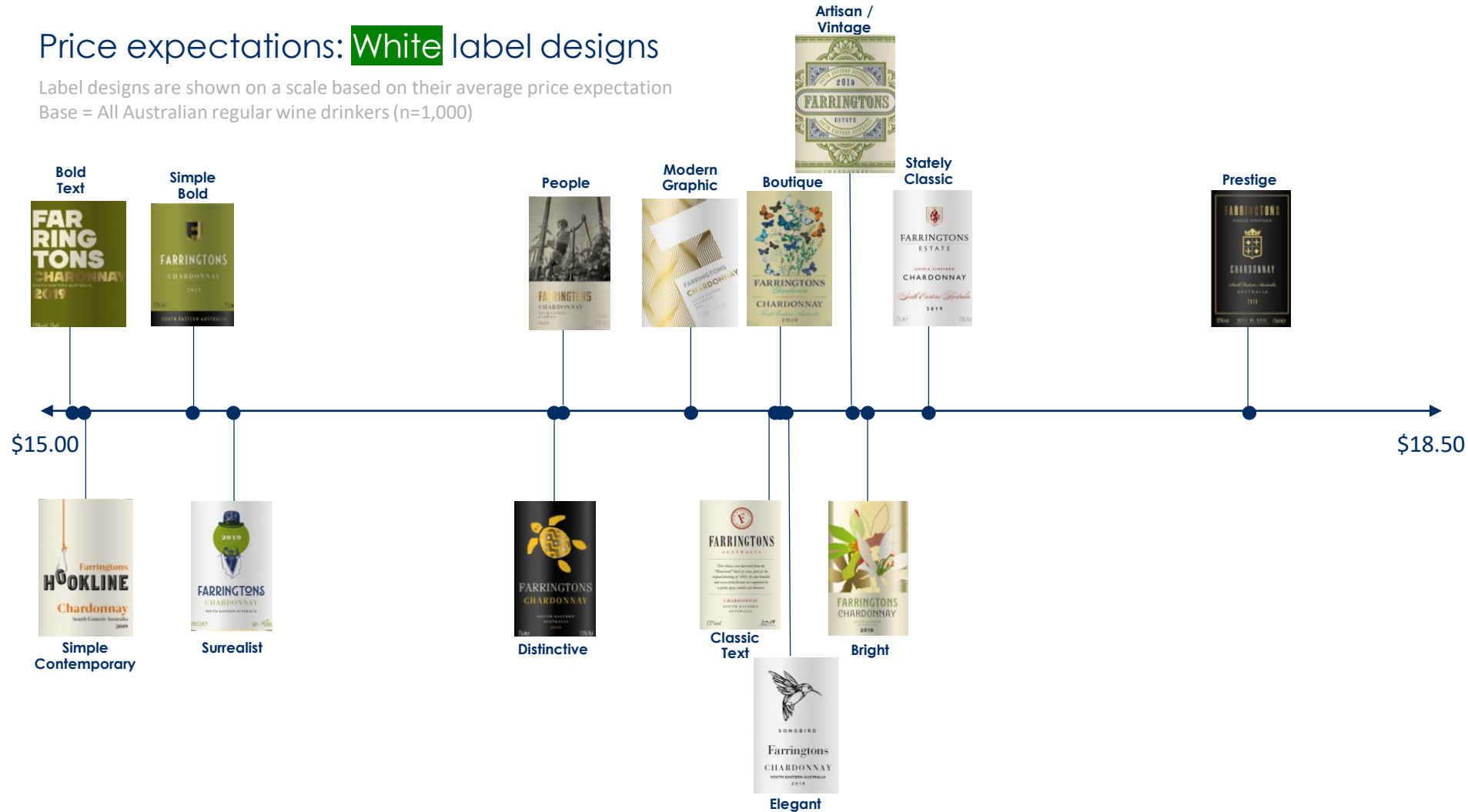
PRICE EXPECTATIONS – WHITE WINES



Bold label designs are perceived as less expensive, around the \$15.00 mark, whilst the Prestige design is perceived as the most expensive at \$18

Price expectations: **White** label designs

Label designs are shown on a scale based on their average price expectation
 Base = All Australian regular wine drinkers (n=1,000)



INTENT TO PURCHASE – WHITE WINES



Intent to purchase amongst white label designs suggests a broader range of designs will work well, though bolder designs are less likely to be purchased by Australian consumers

Net intent to purchase: **White** label designs

Base = All Australian regular wine drinkers (n=1,000)



LABEL IMAGERY – WHITE WINES

The Prestige label design is more highly associated with being sophisticated and elegant, whilst more modern designs (Boutique and Modern Graphic) are seen as stylish

Label imagery: **White** label designs

% who associated the following statements with each label
 Base = All Australian regular wine drinkers (n=1,000)



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 center.

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LABEL PERFORMANCE AMONGST MEN: RED WINES



More 'central' red wine label designs appear to have a clear advantage amongst male consumers, with more adventurous designs seen as conveying lower quality

Net label appeal, intent to purchase and quality expectation: **Red** label designs

Base = All Australian regular wine drinkers (n=1,000)

Net label appeal			
Rank 2020		All Australian regular wine drinkers n= 1,000	Male 536
1	Bright	71	59
2	Elegant	67	63
3	Prestige	67	71
4	Distinctive	65	68
5	Stately Classic	61	70
6	People	50	49
7	Boutique	49	44
8	Modern Graphic	48	53
9	Classic Text	45	57
10	Simple Contemporary	38	39
11	Artisan / Vintage	37	44
12	Simple Bold	33	49
13	Bold Text	33	35
14	Surrealist	31	33

Net intent to purchase			
Rank 2020		All Australian regular wine drinkers n= 1,000	Male 536
1	Prestige	57	71
2	Elegant	51	53
3	Stately Classic	47	55
4	Bright	41	38
5	People	38	42
6	Distinctive	35	36
7	Modern Graphic	35	41
8	Bold Text	31	38
9	Boutique	31	29
10	Classic Text	29	43
11	Artisan / Vintage	22	29
12	Simple Bold	20	34
13	Surrealist	19	26
14	Simple Contemporary	18	22

Net quality expectation			
Rank 2020		All Australian regular wine drinkers n= 1,000	Male 536
1	Prestige	85	84
2	Stately Classic	67	72
3	Elegant	62	61
4	Classic Text	58	59
5	Bright	55	49
6	People	54	53
7	Distinctive	52	50
8	Artisan / Vintage	50	53
9	Modern Graphic	48	47
10	Bold Text	46	49
11	Simple Bold	46	52
12	Boutique	44	41
13	Surrealist	34	31
14	Simple Contemporary	30	33

Top 3:

1st

Prestige



2nd

Stately Classic



3rd

Distinctive



Top 3:

1st

Prestige



2nd

Stately Classic



3rd

Elegant



Top 3:

1st

Prestige



2nd

Stately Classic



3rd

Elegant



LABEL PERFORMANCE AMONGST MEN: WHITE WINES



The appeal of white wine labels amongst male consumers reflects a less conservative attitude compared with red wine labels, with more aesthetically strong designs such as Bright performing well

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

Base = All Australian regular wine drinkers (n=1,000)

Net label appeal			
Rank 2020		All Australian regular wine drinkers n= 1,000	Male 536
1	Bright	74	59
2	Elegant	65	51
3	Boutique	60	48
4	Prestige	56	56
5	Distinctive	55	51
6	Stately Classic	51	56
7	Modern Graphic	40	33
8	Artisan / Vintage	39	37
9	People	31	38
10	Simple Contemporary	28	25
11	Classic Text	25	31
12	Surrealist	22	19
13	Simple Bold	19	22
14	Bold Text	3	5

Net intent to purchase			
Rank 2020		All Australian regular wine drinkers n= 1,000	Male 536
1	Bright	35	28
2	Prestige	35	38
3	Elegant	33	27
4	Stately Classic	32	33
5	Boutique	28	16
6	Distinctive	24	21
7	Modern Graphic	22	20
8	Classic Text	18	22
9	Artisan / Vintage	15	18
10	People	11	16
11	Simple Contemporary	6	2
12	Simple Bold	2	6
13	Surrealist	-1	0
14	Bold Text	-10	-9

Net quality expectation			
Rank 2020		All Australian regular wine drinkers n= 1,000	Male 536
1	Prestige	63	64
2	Stately Classic	52	50
3	Elegant	50	45
4	Classic Text	49	47
5	Bright	48	45
6	Boutique	47	44
7	Artisan / Vintage	44	45
8	Modern Graphic	43	39
9	Distinctive	38	40
10	People	38	41
11	Simple Bold	26	25
12	Surrealist	22	25
13	Simple Contemporary	19	17
14	Bold Text	15	14

Top 3:

1st

2nd

3rd

Bright

Prestige

Stately Classic



Top 3:

1st

2nd

3rd

Prestige

Stately Classic

Bright



Top 3:

1st

2nd

3rd

Prestige

Stately Classic

Classic Text



LABEL PERFORMANCE AMONGST WOMEN: RED WINES



Female consumers also lean towards more conventional designs, though they have a much stronger affinity for the Bright design approach

Net label appeal, intent to purchase and quality expectation: **Red** label designs

Base = All Australian regular wine drinkers (n=1,000)

Net label appeal			
Rank 2020		All Australian regular wine drinkers	Female
	n=	1,000	464
1	Bright	71	84
2	Elegant	67	72
3	Prestige	67	63
4	Distinctive	65	61
5	Stately Classic	61	51
6	People	50	50
7	Boutique	49	55
8	Modern Graphic	48	42
9	Classic Text	45	32
10	Simple Contemporary	38	38
11	Artisan / Vintage	37	29
12	Simple Bold	33	16
13	Bold Text	33	31
14	Surrealist	31	30

Net intent to purchase			
Rank 2020		All Australian regular wine drinkers	Female
	n=	1,000	464
1	Prestige	57	42
2	Elegant	51	49
3	Stately Classic	47	38
4	Bright	41	45
5	People	38	34
6	Distinctive	35	33
7	Modern Graphic	35	27
8	Bold Text	31	24
9	Boutique	31	34
10	Classic Text	29	14
11	Artisan / Vintage	22	14
12	Simple Bold	20	5
13	Surrealist	19	11
14	Simple Contemporary	18	14

Net quality expectation			
Rank 2020		All Australian regular wine drinkers	Female
	n=	1,000	464
1	Prestige	85	86
2	Stately Classic	67	61
3	Elegant	62	63
4	Classic Text	58	58
5	Bright	55	62
6	People	54	55
7	Distinctive	52	53
8	Artisan / Vintage	50	47
9	Modern Graphic	48	49
10	Bold Text	46	41
11	Simple Bold	46	39
12	Boutique	44	48
13	Surrealist	34	36
14	Simple Contemporary	30	27

Top 3:

1st

Bright



2nd

Elegant



3rd

Prestige



Top 3:

1st

Elegant



2nd

Bright



3rd

Prestige



Top 3:

1st

Prestige



2nd

Elegant



3rd

Bright



LABEL PERFORMANCE AMONGST WOMEN: WHITE WINES



Amongst women, winners in appeal and intent to purchase for white labels tend to be more colourful and aesthetically bold

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

Base = All Australian regular wine drinkers (n=1,000)

Net label appeal			
Rank 2020		All Australian regular wine drinkers n= 1,000	Female 464
1	Bright	74	91
2	Elegant	65	83
3	Boutique	60	76
4	Prestige	56	56
5	Distinctive	55	60
6	Stately Classic	51	46
7	Modern Graphic	40	47
8	Artisan / Vintage	39	41
9	People	31	22
10	Simple Contemporary	28	32
11	Classic Text	25	19
12	Surrealist	22	24
13	Simple Bold	19	15
14	Bold Text	3	1

Net intent to purchase			
Rank 2020		All Australian regular wine drinkers n= 1,000	Female 464
1	Bright	35	44
2	Prestige	35	31
3	Elegant	33	40
4	Stately Classic	32	31
5	Boutique	28	43
6	Distinctive	24	27
7	Modern Graphic	22	24
8	Classic Text	18	12
9	Artisan / Vintage	15	10
10	People	11	6
11	Simple Contemporary	6	10
12	Simple Bold	2	-4
13	Surrealist	-1	-1
14	Bold Text	-10	-11

Net quality expectation			
Rank 2020		All Australian regular wine drinkers n= 1,000	Female 464
1	Prestige	63	63
2	Stately Classic	52	55
3	Elegant	50	55
4	Classic Text	49	53
5	Bright	48	52
6	Boutique	47	50
7	Artisan / Vintage	44	43
8	Modern Graphic	43	47
9	Distinctive	38	36
10	People	38	34
11	Simple Bold	26	26
12	Surrealist	22	19
13	Simple Contemporary	19	22
14	Bold Text	15	17

Top 3:

1st

Bright



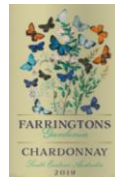
2nd

Elegant



3rd

Boutique



Top 3:

1st

Bright



2nd

Boutique



3rd

Elegant



Top 3:

1st

Prestige



2nd

Elegant



3rd

Stately Classic



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LABEL PERFORMANCE AMONGST GEN Z: RED WINES



Younger adult consumers (LDA-24) tend to be less anchored to traditional red wine label design cues compared with their older peers

Net label appeal, intent to purchase and quality expectation: **Red** label designs

Base = All Australian regular wine drinkers (n=1,000)

Net label appeal			
Rank 2020		All Australian regular wine drinkers n= 1,000	Gen Z n= 90
1	Bright	71	98
2	Elegant	67	102
3	Prestige	67	90
4	Distinctive	65	77
5	Stately Classic	61	70
6	People	50	30
7	Boutique	49	65
8	Modern Graphic	48	66
9	Classic Text	45	58
10	Simple Contemporary	38	92
11	Artisan / Vintage	37	47
12	Simple Bold	33	51
13	Bold Text	33	43
14	Surrealist	31	70

Net intent to purchase			
Rank 2020		All Australian regular wine drinkers n= 1,000	Gen Z n= 90
1	Prestige	57	79
2	Elegant	51	107
3	Stately Classic	47	55
4	Bright	41	38
5	People	38	41
6	Distinctive	35	68
7	Modern Graphic	35	48
8	Bold Text	31	56
9	Boutique	31	57
10	Classic Text	29	62
11	Artisan / Vintage	22	59
12	Simple Bold	20	41
13	Surrealist	19	75
14	Simple Contemporary	18	84

Net quality expectation			
Rank 2020		All Australian regular wine drinkers n= 1,000	Gen Z n= 90
1	Prestige	85	97
2	Stately Classic	67	80
3	Elegant	62	63
4	Classic Text	58	48
5	Bright	55	49
6	People	54	46
7	Distinctive	52	65
8	Artisan / Vintage	50	57
9	Modern Graphic	48	68
10	Bold Text	46	62
11	Simple Bold	46	45
12	Boutique	44	59
13	Surrealist	34	55
14	Simple Contemporary	30	53

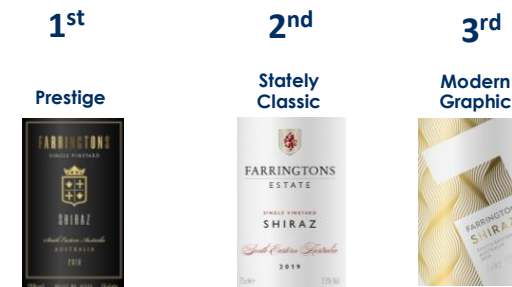
Top 3:



Top 3:



Top 3:



LABEL PERFORMANCE AMONGST GEN Z: WHITE WINES



Gen Z consumers (LDA-24) have a less conservative outlook when it comes to white wine labels, though more traditional approaches are still closely aligned with perceptions of high quality

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

Base = All Australian regular wine drinkers (n=1,000)

Net label appeal				
Rank 2020		All Australian regular wine drinkers n= 1,000	Gen Z 90	
1	Bright	74	97	
2	Elegant	65	94	
3	Boutique	60	88	
4	Prestige	56	81	
5	Distinctive	55	65	
6	Stately Classic	51	68	
7	Modern Graphic	40	69	
8	Artisan / Vintage	39	51	
9	People	31	52	
10	Simple Contemporary	28	21	
11	Classic Text	25	40	
12	Surrealist	22	13	
13	Simple Bold	19	43	
14	Bold Text	3	24	

Net intent to purchase				
Rank 2020		All Australian regular wine drinkers n= 1,000	Gen Z 90	
1	Bright	35	76	
2	Prestige	35	83	
3	Elegant	33	83	
4	Stately Classic	32	78	
5	Boutique	28	58	
6	Distinctive	24	47	
7	Modern Graphic	22	60	
8	Classic Text	18	32	
9	Artisan / Vintage	15	58	
10	People	11	43	
11	Simple Contemporary	6	28	
12	Simple Bold	2	25	
13	Surrealist	-1	18	
14	Bold Text	-10	19	

Net quality expectation				
Rank 2020		All Australian regular wine drinkers n= 1,000	Gen Z 90	
1	Prestige	63	83	
2	Stately Classic	52	55	
3	Elegant	50	75	
4	Classic Text	49	64	
5	Bright	48	36	
6	Boutique	47	42	
7	Artisan / Vintage	44	63	
8	Modern Graphic	43	45	
9	Distinctive	38	56	
10	People	38	47	
11	Simple Bold	26	34	
12	Surrealist	22	12	
13	Simple Contemporary	19	24	
14	Bold Text	15	24	

Top 3:

1st

2nd

3rd

Bright

Elegant

Boutique



Top 3:

1st

2nd

3rd

Prestige

Elegant

Stately Classic



Top 3:

1st

2nd

3rd

Prestige

Elegant

Classic Text



LABEL PERFORMANCE AMONGST MILLENNIALS: RED WINES



Outside of the Prestige label positioning #1 across all measures, Millennials (25-39) are more open to less traditional designs

Net label appeal, intent to purchase and quality expectation: **Red** label designs

Base = All Australian regular wine drinkers (n=1,000)

Net label appeal				
Rank 2020		All Australian regular wine drinkers		Millennials
		n=	1,000	
1	Bright	71	93	
2	Elegant	67	75	
3	Prestige	67	93	
4	Distinctive	65	81	
5	Stately Classic	61	70	
6	People	50	69	
7	Boutique	49	66	
8	Modern Graphic	48	64	
9	Classic Text	45	69	
10	Simple Contemporary	38	58	
11	Artisan / Vintage	37	43	
12	Simple Bold	33	51	
13	Bold Text	33	69	
14	Surrealist	31	55	

Net intent to purchase				
Rank 2020		All Australian regular wine drinkers		Millennials
		n=	1,000	
1	Prestige	57	89	
2	Elegant	51	75	
3	Stately Classic	47	73	
4	Bright	41	76	
5	People	38	76	
6	Distinctive	35	51	
7	Modern Graphic	35	70	
8	Bold Text	31	69	
9	Boutique	31	61	
10	Classic Text	29	52	
11	Artisan / Vintage	22	38	
12	Simple Bold	20	49	
13	Surrealist	19	53	
14	Simple Contemporary	18	51	

Net quality expectation				
Rank 2020		All Australian regular wine drinkers		Millennials
		n=	1,000	
1	Prestige	85	91	
2	Stately Classic	67	75	
3	Elegant	62	67	
4	Classic Text	58	68	
5	Bright	55	70	
6	People	54	68	
7	Distinctive	52	58	
8	Artisan / Vintage	50	56	
9	Modern Graphic	48	60	
10	Bold Text	46	64	
11	Simple Bold	46	62	
12	Boutique	44	47	
13	Surrealist	34	45	
14	Simple Contemporary	30	44	

Top 3:

1st

2nd

3rd

Prestige

Bright

Distinctive



Top 3:

1st

2nd

3rd

Prestige

People

Bright



Top 3:

1st

2nd

3rd

Prestige

Stately Classic

Bright



LABEL PERFORMANCE AMONGST MILLENNIALS: WHITE WINES



Millennial consumers (25-39) have a less conservative outlook when it comes to white wine labels, though more traditional designs are associated with high quality

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

Base = All Australian regular wine drinkers (n=1,000)

Net label appeal				
Rank 2020		All Australian regular wine drinkers	Millennials	
	n=	1,000	284	
1	Bright	74	84	
2	Elegant	65	74	
3	Boutique	60	70	
4	Prestige	56	74	
5	Distinctive	55	61	
6	Stately Classic	51	71	
7	Modern Graphic	40	65	
8	Artisan / Vintage	39	46	
9	People	31	38	
10	Simple Contemporary	28	53	
11	Classic Text	25	50	
12	Surrealist	22	40	
13	Simple Bold	19	35	
14	Bold Text	3	29	

Net intent to purchase				
Rank 2020		All Australian regular wine drinkers	Millennials	
	n=	1,000	284	
1	Bright	35	62	
2	Prestige	35	78	
3	Elegant	33	60	
4	Stately Classic	32	62	
5	Boutique	28	49	
6	Distinctive	24	54	
7	Modern Graphic	22	56	
8	Classic Text	18	50	
9	Artisan / Vintage	15	38	
10	People	11	45	
11	Simple Contemporary	6	34	
12	Simple Bold	2	35	
13	Surrealist	-1	29	
14	Bold Text	-10	22	

Net quality expectation				
Rank 2020		All Australian regular wine drinkers	Millennials	
	n=	1,000	284	
1	Prestige	63	76	
2	Stately Classic	52	68	
3	Elegant	50	55	
4	Classic Text	49	68	
5	Bright	48	63	
6	Boutique	47	58	
7	Artisan / Vintage	44	55	
8	Modern Graphic	43	60	
9	Distinctive	38	40	
10	People	38	54	
11	Simple Bold	26	36	
12	Surrealist	22	29	
13	Simple Contemporary	19	26	
14	Bold Text	15	30	

Top 3:

1st

2nd

3rd

Bright

Elegant

Prestige



Top 3:

1st

2nd

3rd

Prestige

Bright

Stately Classic



Top 3:

1st

2nd

3rd

Prestige

Classic Text

Stately Classic



LABEL PERFORMANCE AMONGST GEN X: RED WINES



Gen X consumers (40-54) tend to be more anchored by traditional designs which are still closely aligned with perceptions of high quality

Net label appeal, intent to purchase and quality expectation: **Red** label designs

Base = All Australian regular wine drinkers (n=1,000)

Net label appeal			
Rank 2020		All Australian regular wine drinkers n= 1,000	Gen X 276
1	Bright	71	61
2	Elegant	67	76
3	Prestige	67	66
4	Distinctive	65	62
5	Stately Classic	61	71
6	People	50	53
7	Boutique	49	39
8	Modern Graphic	48	54
9	Classic Text	45	53
10	Simple Contemporary	38	41
11	Artisan / Vintage	37	43
12	Simple Bold	33	34
13	Bold Text	33	26
14	Surrealist	31	30

Net intent to purchase			
Rank 2020		All Australian regular wine drinkers n= 1,000	Gen X 276
1	Prestige	57	60
2	Elegant	51	58
3	Stately Classic	47	55
4	Bright	41	39
5	People	38	41
6	Distinctive	35	41
7	Modern Graphic	35	35
8	Bold Text	31	37
9	Boutique	31	26
10	Classic Text	29	37
11	Artisan / Vintage	22	29
12	Simple Bold	20	25
13	Surrealist	19	19
14	Simple Contemporary	18	16

Net quality expectation			
Rank 2020		All Australian regular wine drinkers n= 1,000	Gen X 276
1	Prestige	85	89
2	Stately Classic	67	69
3	Elegant	62	66
4	Classic Text	58	62
5	Bright	55	48
6	People	54	55
7	Distinctive	52	52
8	Artisan / Vintage	50	52
9	Modern Graphic	48	46
10	Bold Text	46	34
11	Simple Bold	46	49
12	Boutique	44	41
13	Surrealist	34	31
14	Simple Contemporary	30	32

Top 3:

1st 2nd 3rd



Top 3:

1st 2nd 3rd



Top 3:

1st 2nd 3rd



LABEL PERFORMANCE AMONGST GEN X: WHITE WINES



The appeal of white wine labels amongst Gen X consumers (40-54) is less conservative, with Bright performing well across all measures

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

Base = All Australian regular wine drinkers (n=1,000)

Net label appeal			
Rank 2020		All Australian regular wine drinkers n= 1,000	Gen X 276
1	Bright	74	77
2	Elegant	65	62
3	Boutique	60	66
4	Prestige	56	62
5	Distinctive	55	49
6	Stately Classic	51	53
7	Modern Graphic	40	35
8	Artisan / Vintage	39	36
9	People	31	24
10	Simple Contemporary	28	32
11	Classic Text	25	28
12	Surrealist	22	24
13	Simple Bold	19	15
14	Bold Text	3	-5

Net intent to purchase			
Rank 2020		All Australian regular wine drinkers n= 1,000	Gen X 276
1	Bright	35	38
2	Prestige	35	33
3	Elegant	33	31
4	Stately Classic	32	31
5	Boutique	28	29
6	Distinctive	24	24
7	Modern Graphic	22	24
8	Classic Text	18	30
9	Artisan / Vintage	15	15
10	People	11	7
11	Simple Contemporary	6	10
12	Simple Bold	2	-1
13	Surrealist	-1	2
14	Bold Text	-10	-11

Net quality expectation			
Rank 2020		All Australian regular wine drinkers n= 1,000	Gen X 276
1	Prestige	63	66
2	Stately Classic	52	52
3	Elegant	50	45
4	Classic Text	49	50
5	Bright	48	56
6	Boutique	47	51
7	Artisan / Vintage	44	39
8	Modern Graphic	43	43
9	Distinctive	38	40
10	People	38	35
11	Simple Bold	26	21
12	Surrealist	22	26
13	Simple Contemporary	19	20
14	Bold Text	15	12

Top 3:

1st

2nd

3rd

Bright

Boutique

Prestige



Top 3:

1st

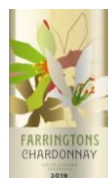
2nd

3rd

Bright

Prestige

Elegant



Top 3:

1st

2nd

3rd

Prestige

Bright

Stately Classic



LABEL PERFORMANCE AMONGST BOOMERS: RED WINES



Compared to their younger counterparts, traditional designs are favoured by Boomers (55+) as they are perceived as high quality, but purchase intent in general is lower compared with other age cohorts

Net label appeal, intent to purchase and quality expectation: **Red** label designs

Base = All Australian regular wine drinkers (n=1,000)

Net label appeal				
Rank 2020		All Australian regular wine drinkers n= 1,000	Boomers 350	
1	Bright	71	56	
2	Elegant	67	47	
3	Prestige	67	43	
4	Distinctive	65	51	
5	Stately Classic	61	43	
6	People	50	34	
7	Boutique	49	41	
8	Modern Graphic	48	25	
9	Classic Text	45	16	
10	Simple Contemporary	38	9	
11	Artisan / Vintage	37	24	
12	Simple Bold	33	14	
13	Bold Text	33	9	
14	Surrealist	31	6	

Net intent to purchase				
Rank 2020		All Australian regular wine drinkers n= 1,000	Boomers 350	
1	Prestige	57	25	
2	Elegant	51	13	
3	Stately Classic	47	17	
4	Bright	41	16	
5	People	38	5	
6	Distinctive	35	10	
7	Modern Graphic	35	3	
8	Bold Text	31	-9	
9	Boutique	31	7	
10	Classic Text	29	-3	
11	Artisan / Vintage	22	-5	
12	Simple Bold	20	-12	
13	Surrealist	19	-21	
14	Simple Contemporary	18	-20	

Net quality expectation				
Rank 2020		All Australian regular wine drinkers n= 1,000	Boomers 350	
1	Prestige	85	73	
2	Stately Classic	67	56	
3	Elegant	62	55	
4	Classic Text	58	50	
5	Bright	55	51	
6	People	54	44	
7	Distinctive	52	44	
8	Artisan / Vintage	50	42	
9	Modern Graphic	48	36	
10	Bold Text	46	38	
11	Simple Bold	46	30	
12	Boutique	44	42	
13	Surrealist	34	23	
14	Simple Contemporary	30	12	

Top 3:

1st

Bright



2nd

Distinctive



3rd

Elegant



Top 3:

1st

Prestige



2nd

Stately Classic



3rd

Bright



Top 3:

1st

Prestige



2nd

Stately Classic



3rd

Elegant



LABEL PERFORMANCE AMONGST BOOMERS: WHITE WINES



Compared with their younger counterparts, Boomers (55+) have more conservative views when it comes to purchase intent and quality perception of white wine labels

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

Base = All Australian regular wine drinkers (n=1,000)

Net label appeal			
Rank 2020		All Australian regular wine drinkers n= 1,000	Boomers 350
1	Bright	74	56
2	Elegant	65	52
3	Boutique	60	40
4	Prestige	56	30
5	Distinctive	55	52
6	Stately Classic	51	29
7	Modern Graphic	40	13
8	Artisan / Vintage	39	31
9	People	31	24
10	Simple Contemporary	28	7
11	Classic Text	25	-1
12	Surrealist	22	7
13	Simple Bold	19	2
14	Bold Text	3	-19

Net intent to purchase			
Rank 2020		All Australian regular wine drinkers n= 1,000	Boomers 350
1	Bright	35	-1
2	Prestige	35	-14
3	Elegant	33	-2
4	Stately Classic	32	-5
5	Boutique	28	1
6	Distinctive	24	-8
7	Modern Graphic	22	-19
8	Classic Text	18	-21
9	Artisan / Vintage	15	-18
10	People	11	-23
11	Simple Contemporary	6	-27
12	Simple Bold	2	-31
13	Surrealist	-1	-33
14	Bold Text	-10	-44

Net quality expectation			
Rank 2020		All Australian regular wine drinkers n= 1,000	Boomers 350
1	Prestige	63	46
2	Stately Classic	52	39
3	Elegant	50	41
4	Classic Text	49	29
5	Bright	48	34
6	Boutique	47	36
7	Artisan / Vintage	44	34
8	Modern Graphic	43	28
9	Distinctive	38	31
10	People	38	25
11	Simple Bold	26	18
12	Surrealist	22	17
13	Simple Contemporary	19	12
14	Bold Text	15	3

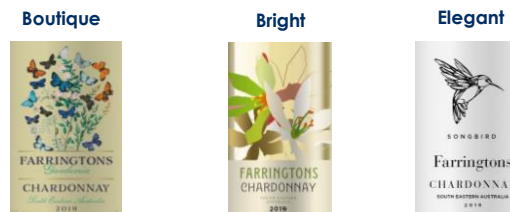
Top 3:

1st 2nd 3rd



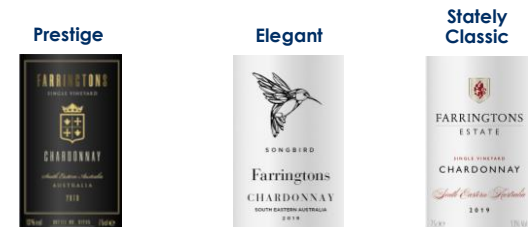
Top 3:

1st 2nd 3rd



Top 3:

1st 2nd 3rd



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AUSTRALIA PORTRAITS SEGMENTATION



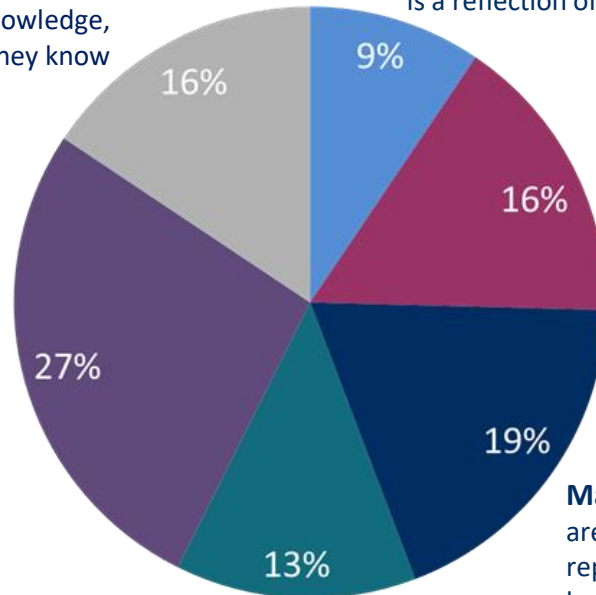
The Australian wine drinking population splits into six segments based on the relationship with the category

% Share of Australian regular wine drinkers by Portraits segments

Kitchen Casuals: A majority are aged over 45 years old, while drinking wine infrequently and almost exclusively at home. They have the lowest overall spend on wine and demonstrate limited knowledge, tending to stick to what they know

Engaged Explorers: One of the younger segments, typically under 44 years, with a higher proportion of men. They are the most frequent wine drinkers and the highest spenders, buying from a broad repertoire of wine styles, countries and regions. With a high level of confidence yet mid-level knowledge of wine, which is a reflection of their relatively shorter time as wine drinkers

Senior Bargain Hunters: One of the oldest wine drinking segments with a small share of total spend. Time in the category has led to relatively strong wine knowledge, but low involvement. However, they still purchase from a narrow repertoire of wine styles and brands, being strongly value driven



Social Newbies: Youngest segment with majority of wine drinkers under 35 years old and a higher proportion of men. They are more likely to drink wine in the on-premise or in a social setting. Their limited experience means they have less knowledge of wine and are more likely to ask for recommendations from friends and family when choosing wine

Contented Treaters: Aged between 24 to 44 years old and skewed female, with reasonable levels of wine knowledge, involvement and willingness to spend more per bottle of wine. Their low levels of wine consumption frequency leads to low levels of confidence

Mainstream Matures: A majority of people in this group are aged over 45 with equal male and female representation. They demonstrate the highest levels of knowledge, involvement and confidence of all segments in the wine category and are very value driven wine consumers

LABEL PERFORMANCE AMONGST ENGAGED EXPLORERS : RED WINES



More 'central' red label designs have a clear advantage amongst Engaged Explorers, though performance of all label designs is high, owing to higher levels of confidence and interest for wine amongst this Portraits segment

Net label appeal, intent to purchase and quality expectation: **Red** label designs

Base = All Australian regular wine drinkers (n=1,000)

Net label appeal			
Rank 2020		All Australian regular wine drinkers n= 1,000	Engaged Explorers 142
1	Bright	71	87
2	Elegant	67	73
3	Prestige	67	108
4	Distinctive	65	84
5	Stately Classic	61	101
6	People	50	64
7	Boutique	49	50
8	Modern Graphic	48	87
9	Classic Text	45	103
10	Simple Contemporary	38	77
11	Artisan / Vintage	37	58
12	Simple Bold	33	69
13	Bold Text	33	69
14	Surrealist	31	54

Net intent to purchase			
Rank 2020		All Australian regular wine drinkers n= 1,000	Engaged Explorers 142
1	Prestige	57	119
2	Elegant	51	80
3	Stately Classic	47	98
4	Bright	41	73
5	People	38	70
6	Distinctive	35	68
7	Modern Graphic	35	84
8	Bold Text	31	81
9	Boutique	31	70
10	Classic Text	29	90
11	Artisan / Vintage	22	64
12	Simple Bold	20	65
13	Surrealist	19	52
14	Simple Contemporary	18	71

Net quality expectation			
Rank 2020		All Australian regular wine drinkers n= 1,000	Engaged Explorers 142
1	Prestige	85	128
2	Stately Classic	67	90
3	Elegant	62	74
4	Classic Text	58	85
5	Bright	55	70
6	People	54	79
7	Distinctive	52	71
8	Artisan / Vintage	50	74
9	Modern Graphic	48	62
10	Bold Text	46	64
11	Simple Bold	46	76
12	Boutique	44	68
13	Surrealist	34	48
14	Simple Contemporary	30	55

Top 3:

1st

Prestige



2nd

Classic Text



3rd

Stately Classic



Top 3:

1st

Prestige



2nd

Stately Classic



3rd

Classic Text



Top 3:

1st

Prestige



2nd

Stately Classic



3rd

Classic Text



LABEL PERFORMANCE AMONGST ENGAGED EXPLORERS : WHITE WINES



Though 'central' designs still dominate for white wine label appeal amongst Engaged Explorers, bright and colourful labels make it into the top 3 for intent to purchase and quality expectations

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

Base = All Australian regular wine drinkers (n=1,000)

Net label appeal				
Rank 2020		All Australian regular wine drinkers n=	Engaged Explorers	
1	Bright	74	80	
2	Elegant	65	86	
3	Boutique	60	83	
4	Prestige	56	96	
5	Distinctive	55	59	
6	Stately Classic	51	90	
7	Modern Graphic	40	76	
8	Artisan / Vintage	39	60	
9	People	31	74	
10	Simple Contemporary	28	63	
11	Classic Text	25	62	
12	Surrealist	22	62	
13	Simple Bold	19	66	
14	Bold Text	3	44	

Net intent to purchase				
Rank 2020		All Australian regular wine drinkers n=	Engaged Explorers	
1	Bright	35	77	
2	Prestige	35	94	
3	Elegant	33	75	
4	Stately Classic	32	90	
5	Boutique	28	65	
6	Distinctive	24	66	
7	Modern Graphic	22	74	
8	Classic Text	18	63	
9	Artisan / Vintage	15	64	
10	People	11	65	
11	Simple Contemporary	6	34	
12	Simple Bold	2	59	
13	Surrealist	-1	66	
14	Bold Text	-10	56	

Net quality expectation				
Rank 2020		All Australian regular wine drinkers n=	Engaged Explorers	
1	Prestige	63	77	
2	Stately Classic	52	69	
3	Elegant	50	64	
4	Classic Text	49	74	
5	Bright	48	73	
6	Boutique	47	61	
7	Artisan / Vintage	44	55	
8	Modern Graphic	43	65	
9	Distinctive	38	50	
10	People	38	59	
11	Simple Bold	26	49	
12	Surrealist	22	45	
13	Simple Contemporary	19	42	
14	Bold Text	15	50	

Top 3:

1st

2nd

3rd

Prestige

Stately Classic

Elegant



Top 3:

1st

2nd

3rd

Prestige

Stately Classic

Bright



Top 3:

1st

2nd

3rd

Prestige

Classic Text

Bright



LABEL PERFORMANCE AMONGST SOCIAL NEWBIES: RED WINES



Sophisticated and elegant red wine label designs work well amongst Social Newbies, reflecting their reliance on peers and / or family for recommendations and a more limited knowledge of the wine category

Net label appeal, intent to purchase and quality expectation: **Red** label designs

Base = All Australian regular wine drinkers (n=1,000)

Net label appeal			
Rank 2020		All Australian regular wine drinkers n= 1,000	Social Newbies 140
1	Bright	71	91
2	Elegant	67	100
3	Prestige	67	105
4	Distinctive	65	92
5	Stately Classic	61	75
6	People	50	89
7	Boutique	49	84
8	Modern Graphic	48	51
9	Classic Text	45	84
10	Simple Contemporary	38	63
11	Artisan / Vintage	37	78
12	Simple Bold	33	59
13	Bold Text	33	73
14	Surrealist	31	69

Net intent to purchase			
Rank 2020		All Australian regular wine drinkers n= 1,000	Social Newbies 140
1	Prestige	57	93
2	Elegant	51	98
3	Stately Classic	47	87
4	Bright	41	72
5	People	38	83
6	Distinctive	35	85
7	Modern Graphic	35	79
8	Bold Text	31	96
9	Boutique	31	83
10	Classic Text	29	75
11	Artisan / Vintage	22	69
12	Simple Bold	20	73
13	Surrealist	19	63
14	Simple Contemporary	18	64

Net quality expectation			
Rank 2020		All Australian regular wine drinkers n= 1,000	Social Newbies 140
1	Prestige	85	73
2	Stately Classic	67	69
3	Elegant	62	77
4	Classic Text	58	75
5	Bright	55	61
6	People	54	64
7	Distinctive	52	78
8	Artisan / Vintage	50	63
9	Modern Graphic	48	57
10	Bold Text	46	69
11	Simple Bold	46	65
12	Boutique	44	66
13	Surrealist	34	51
14	Simple Contemporary	30	48

Top 3:

1st

Prestige



2nd

Elegant



3rd

Distinctive



Top 3:

1st

Elegant



2nd

Bold Text



3rd

Prestige



Top 3:

1st

Distinctive



2nd

Elegant



3rd

Classic Text



LABEL PERFORMANCE AMONGST SOCIAL NEWBIES: WHITE WINES



Social Newbies show a preference for more traditional designs in terms of quality expectation and intent to purchase, likely reflecting their limited knowledge in the category and reliance upon others for recommendations

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

Base = All Australian regular wine drinkers (n=1,000)

Net label appeal				
Rank 2020		All Australian regular wine drinkers n=	Social Newbies n=	
1	Bright	74	86	
2	Elegant	65	80	
3	Boutique	60	66	
4	Prestige	56	74	
5	Distinctive	55	67	
6	Stately Classic	51	75	
7	Modern Graphic	40	59	
8	Artisan / Vintage	39	61	
9	People	31	48	
10	Simple Contemporary	28	52	
11	Classic Text	25	66	
12	Surrealist	22	52	
13	Simple Bold	19	62	
14	Bold Text	3	32	

Net intent to purchase				
Rank 2020		All Australian regular wine drinkers n=	Social Newbies n=	
1	Bright	35	72	
2	Prestige	35	98	
3	Elegant	33	75	
4	Stately Classic	32	92	
5	Boutique	28	55	
6	Distinctive	24	74	
7	Modern Graphic	22	70	
8	Classic Text	18	60	
9	Artisan / Vintage	15	65	
10	People	11	79	
11	Simple Contemporary	6	59	
12	Simple Bold	2	59	
13	Surrealist	-1	43	
14	Bold Text	-10	32	

Net quality expectation				
Rank 2020		All Australian regular wine drinkers n=	Social Newbies n=	
1	Prestige	63	66	
2	Stately Classic	52	54	
3	Elegant	50	64	
4	Classic Text	49	74	
5	Bright	48	51	
6	Boutique	47	47	
7	Artisan / Vintage	44	58	
8	Modern Graphic	43	49	
9	Distinctive	38	60	
10	People	38	74	
11	Simple Bold	26	43	
12	Surrealist	22	30	
13	Simple Contemporary	19	41	
14	Bold Text	15	35	

Top 3:

1st

Bright



2nd

Elegant



3rd

Stately Classic



Top 3:

1st

Prestige



2nd

Stately Classic



3rd

People



Top 3:

1st

Classic Text



2nd

People



3rd

Prestige



LABEL PERFORMANCE AMONGST MAINSTREAM MATURES: RED WINES



Amongst Mainstream Matures, traditional designs dominate intent to purchase and quality expectations, though Bright designs also feature in the top 3 for appeal

Net label appeal, intent to purchase and quality expectation: **Red** label designs

Base = All Australian regular wine drinkers (n=1,000)

Net label appeal				
Rank 2020		All Australian regular wine drinkers n=	Mainstream Matures n=	
1	Bright	71	194	
2	Elegant	67	70	
3	Prestige	67	89	
4	Distinctive	65	60	
5	Stately Classic	61	72	
6	People	50	55	
7	Boutique	49	47	
8	Modern Graphic	48	42	
9	Classic Text	45	50	
10	Simple Contemporary	38	37	
11	Artisan / Vintage	37	48	
12	Simple Bold	33	32	
13	Bold Text	33	36	
14	Surrealist	31	23	

Net intent to purchase				
Rank 2020		All Australian regular wine drinkers n=	Mainstream Matures n=	
1	Prestige	57	61	
2	Elegant	51	49	
3	Stately Classic	47	49	
4	Bright	41	38	
5	People	38	43	
6	Distinctive	35	22	
7	Modern Graphic	35	26	
8	Bold Text	31	20	
9	Boutique	31	24	
10	Classic Text	29	24	
11	Artisan / Vintage	22	22	
12	Simple Bold	20	3	
13	Surrealist	19	14	
14	Simple Contemporary	18	2	

Net quality expectation				
Rank 2020		All Australian regular wine drinkers n=	Mainstream Matures n=	
1	Prestige	85	92	
2	Stately Classic	67	73	
3	Elegant	62	67	
4	Classic Text	58	61	
5	Bright	55	54	
6	People	54	50	
7	Distinctive	52	43	
8	Artisan / Vintage	50	56	
9	Modern Graphic	48	39	
10	Bold Text	46	30	
11	Simple Bold	46	34	
12	Boutique	44	42	
13	Surrealist	34	28	
14	Simple Contemporary	30	21	

Top 3:

1st

Prestige



2nd

Bright



3rd

Stately Classic



Top 3:

1st

Prestige



2nd

Elegant



3rd

Stately Classic



Top 3:

1st

Prestige



2nd

Stately Classic



3rd

Elegant



LABEL PERFORMANCE AMONGST MAINSTREAM MATURES: WHITE WINES



Amongst Mainstream Matures, more traditional designs still dominate quality expectations, though winners in appeal and intent to purchase tend to be brighter and more colourful

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

Base = All Australian regular wine drinkers (n=1,000)

Net label appeal			
Rank 2020		All Australian regular wine drinkers n= 1,000	Mainstream Matures 194
1	Bright	74	69
2	Elegant	65	54
3	Boutique	60	57
4	Prestige	56	55
5	Distinctive	55	53
6	Stately Classic	51	41
7	Modern Graphic	40	25
8	Artisan / Vintage	39	49
9	People	31	30
10	Simple Contemporary	28	20
11	Classic Text	25	20
12	Surrealist	22	17
13	Simple Bold	19	14
14	Bold Text	3	-8

Net intent to purchase			
Rank 2020		All Australian regular wine drinkers n= 1,000	Mainstream Matures 194
1	Bright	35	23
2	Prestige	35	20
3	Elegant	33	19
4	Stately Classic	32	14
5	Boutique	28	20
6	Distinctive	24	9
7	Modern Graphic	22	6
8	Classic Text	18	15
9	Artisan / Vintage	15	6
10	People	11	-9
11	Simple Contemporary	6	-3
12	Simple Bold	2	-14
13	Surrealist	-1	-7
14	Bold Text	-10	-22

Net quality expectation			
Rank 2020		All Australian regular wine drinkers n= 1,000	Mainstream Matures 194
1	Prestige	63	64
2	Stately Classic	52	49
3	Elegant	50	41
4	Classic Text	49	47
5	Bright	48	38
6	Boutique	47	41
7	Artisan / Vintage	44	40
8	Modern Graphic	43	32
9	Distinctive	38	28
10	People	38	27
11	Simple Bold	26	14
12	Surrealist	22	17
13	Simple Contemporary	19	9
14	Bold Text	15	-3

Top 3:

1st 2nd 3rd



Top 3:

1st 2nd 3rd



Top 3:

1st 2nd 3rd



LABEL PERFORMANCE AMONGST CONTENTED TREATERS: RED WINES



Correlating with the higher proportion of women in the Portraits segment, Contented Treaters have a preference for colourful and aesthetically bold designs

Net label appeal, intent to purchase and quality expectation: **Red** label designs

Base = All Australian regular wine drinkers (n=1,000)

Net label appeal				
Rank 2020		All Australian regular wine drinkers n=	Contented Treaters n=	
1	Bright	71	141	
2	Elegant	67	59	
3	Prestige	67	55	
4	Distinctive	65	60	
5	Stately Classic	61	59	
6	People	50	37	
7	Boutique	49	59	
8	Modern Graphic	48	50	
9	Classic Text	45	30	
10	Simple Contemporary	38	27	
11	Artisan / Vintage	37	20	
12	Simple Bold	33	35	
13	Bold Text	33	25	
14	Surrealist	31	36	

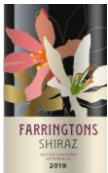
Net intent to purchase				
Rank 2020		All Australian regular wine drinkers n=	Contented Treaters n=	
1	Prestige	57	53	
2	Elegant	51	59	
3	Stately Classic	47	49	
4	Bright	41	49	
5	People	38	33	
6	Distinctive	35	34	
7	Modern Graphic	35	35	
8	Bold Text	31	19	
9	Boutique	31	22	
10	Classic Text	29	17	
11	Artisan / Vintage	22	-1	
12	Simple Bold	20	26	
13	Surrealist	19	23	
14	Simple Contemporary	18	5	

Net quality expectation				
Rank 2020		All Australian regular wine drinkers n=	Contented Treaters n=	
1	Prestige	85	71	
2	Stately Classic	67	58	
3	Elegant	62	46	
4	Classic Text	58	37	
5	Bright	55	47	
6	People	54	42	
7	Distinctive	52	29	
8	Artisan / Vintage	50	43	
9	Modern Graphic	48	39	
10	Bold Text	46	24	
11	Simple Bold	46	40	
12	Boutique	44	23	
13	Surrealist	34	26	
14	Simple Contemporary	30	14	

Top 3:

1st

Bright



2nd

Distinctive



3rd

Elegant



Top 3:

1st

Elegant



2nd

Prestige



3rd

Bright



Top 3:

1st

Prestige



2nd

Stately Classic



3rd

Bright



LABEL PERFORMANCE AMONGST CONTENTED TREATERS: WHITE WINES



Amongst Contented Treater, traditional designs still dominate quality expectations, though winners in appeal and intent to purchase tend to be more colourful and aesthetically bold

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

Base = All Australian regular wine drinkers (n=1,000)

Net label appeal			
Rank 2020		All Australian regular wine drinkers n= 1,000	Contented Treaters 141
1	Bright	74	64
2	Elegant	65	62
3	Boutique	60	57
4	Prestige	56	55
5	Distinctive	55	53
6	Stately Classic	51	39
7	Modern Graphic	40	55
8	Artisan / Vintage	39	23
9	People	31	19
10	Simple Contemporary	28	26
11	Classic Text	25	12
12	Surrealist	22	7
13	Simple Bold	19	0
14	Bold Text	3	-9

Net intent to purchase			
Rank 2020		All Australian regular wine drinkers n= 1,000	Contented Treaters 141
1	Bright	35	21
2	Prestige	35	43
3	Elegant	33	43
4	Stately Classic	32	27
5	Boutique	28	28
6	Distinctive	24	23
7	Modern Graphic	22	21
8	Classic Text	18	20
9	Artisan / Vintage	15	13
10	People	11	3
11	Simple Contemporary	6	-3
12	Simple Bold	2	-7
13	Surrealist	-1	-16
14	Bold Text	-10	-11

Net quality expectation			
Rank 2020		All Australian regular wine drinkers n= 1,000	Contented Treaters 141
1	Prestige	63	73
2	Stately Classic	52	57
3	Elegant	50	43
4	Classic Text	49	39
5	Bright	48	26
6	Boutique	47	37
7	Artisan / Vintage	44	43
8	Modern Graphic	43	39
9	Distinctive	38	24
10	People	38	26
11	Simple Bold	26	11
12	Surrealist	22	8
13	Simple Contemporary	19	1
14	Bold Text	15	-1

Top 3:

1st

2nd

3rd

Bright



Elegant



Boutique



Top 3:

1st

2nd

3rd

Elegant



Prestige



Boutique



Top 3:

1st

2nd

3rd

Prestige



Stately Classic



Elegant



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 - Key findings: White label designs imagery
 - Key findings: Top 5 white and red label designs

- 27** Key findings of red and white labels: All sample
 - Label appeal
 - Quality expectations
 - Price expectations
 - Intent to purchase
 - Label imagery

- 40** Key findings of red and white labels: By gender
 - Label performance amongst men
 - Label performance amongst women

- 45** Key findings of red and white labels: By age
 - Label performance amongst Gen Z
 - Label performance amongst Millennials
 - Label performance amongst Gen X
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- 54** Key findings of red and white labels: By Portraits
 - Australia Portraits segmentation
 - Label performance amongst Engaged Explorers
 - Label performance amongst Social Newbies
 - Label performance amongst Mainstream Matures
 - Label performance amongst Contented Treaters

- 64** Research methodology
 - Australia Portraits overview
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AUSTRALIAN PORTRAITS OVERVIEW



	Engaged Explorers	Social Newbies	Mainstream Matures	Contented Treaters	Senior Bargain Hungers	Kitchen Casuals
Who are they?	Younger, confident wine drinkers who enjoy discovering new wines	One of the youngest segments, drinking fairly frequently, their low knowledge is driven by less years of experience in the category	Mid to older aged, frequent wine drinkers, value driven but very knowledgeable	Infrequent, but have a higher than average spend per bottle and often use price as a proxy for quality	Most infrequent and one of the oldest segments with good knowledge due to a long time in the category	One of the oldest, very infrequently drinking segments. They have little interest in the category
Why do they drink wine?	Wine is part of their lifestyle and social life so they spend time and money in the category	Wine is often consumed in the on-premise and in social situations with friends and family	Drinking wine is part of their daily routine and frequently enjoy wine in both off- and on-premise occasions	They have wine infrequently but enjoy it in social situations as a treat or to pair with their dinner	Lowest confidence in their knowledge. Wine drinking centers around casual occasions at home	Do not understand much about wine and have little interest to learn more. They mostly drink at home for informal occasions
Where?	Enjoy buying from local bottle shops and wineries, and are not particularly motivated by promotional offers	Main factor when buying wine is convenience, so many wine-buying channels are used	Get wine from a broad range of channels that offer a familiar range as well as promotional offers	They buy wine from the local bottle shop or from wineries they visit to stock up	Most consumers get their wine from the supermarket attached liquor store or local bottle shops	Very price-conscious. Their primary channel is the supermarket attached liquor stores
What do they drink?	Have the broadest repertoire and enjoy trying new varietals, regions and types of wine	They are exploring the category and enjoy trying more niche varietals and regions of origin	Confident and comfortable with their knowledge, varietals and places of origin, and are happy to explore within this repertoire	Rely heavily on their knowledge of grape variety when buying wine and less reliance on places of origin and brand	Drink more white wine than red, have good knowledge of varietals and places of origin, but tend to drink from a narrow repertoire	Drink from a very narrow repertoire and stick to what they know

RESEARCH METHODOLOGY: QUANTITATIVE



The data for this report was collected in Australia in October 2020

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

Respondents were screened to ensure that they were at least 18 years old; drank red, white or rosé 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 Australian regular wine drinkers in terms of gender, age and region

The distribution of the sample is shown in the table

		Oct-20
		n= 1,000
Gender	Male	54%
	Female	46%
	Total	100%
Age	18-24	9%
	25-34	19%
	35-44	18%
	45-54	19%
	55-64	16%
	65 and over	19%
	Total	100%
Region	Australian Capital Territory	1%
	New South Wales	33%
	Northern Territory	1%
	Queensland	20%
	South Australia	7%
	Tasmania	3%
	Victoria	25%
	Western Australia	9%
Total	100%	

Source: Wine Intelligence, Vinitrac® Australia, October 2020 (n = 1,000), Australian regular wine drinkers

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