

A BRAND BY ANY OTHER NAME

What is the relationship between brands and growing regions for consumers loyal only to price points? Joel B. Payne looks at a Wine Intelligence survey.

Although it displeases Europeans, who like to think of their regions of production as being unique expressions of soil and climate, appellations are fast becoming brands. In fact, many like Champagne, Chianti or Rioja already are. However, much as Robert Mondavi, JP Chenet or Antinori have varying levels of success in different markets, so too is the brand awareness of any major appellation very dependant on the market. What flies in Ireland, may not work in Singapore.

Sometimes this has historical, political or linguistical foundations, especially when geographical proximity was a brand's chief trump. Interestingly enough, though, brand awareness does not always translate into sales - and consumers' views of their buying habits often do not stack up to reality.

This was clear in a recent study by Wine Intelligence. The British company surveyed wine consumers, defined as those who drink at least one bottle of wine per month, on their awareness of 27 growing regions in five countries. The results are broken down into three categories, of which two are shown in the right hand column: prompted awareness and penetration based on purchases over the past three months. As regions like the Mosel in Germany, Stellenbosch in South Africa and Mendoza in Argentina, to name but a few, were not included in the survey, the results do not reflect the market as a whole, but they do give an interesting insight into the disconnect between perception and reality.

The most interesting thing about such surveys, says Robert Joseph "is the level of self delusion it reveals about consumers. Another survey of Wine Intelligence, for example, divulged the fact that only 4% of the respondents drank American wine, compared to 22% for France, but both countries are neck and

neck with 16-18% market share." The fact that Bordeaux ranks first in Canada speaks for the European bias of Quebec and Ontario. Had this survey been conducted on an age basis, the results, according to Tony Aspler, may have been radically different. Consumers under 35, especially those on the west coast, would probably have mentioned Napa, Barossa and Maipo before they mentioned Bordeaux. Further, for most Canadians Champagne is not viewed as a region, but as a wine style.

Tony Hiron from the The Merchant Vintner in Toronto retorted with marked surprise that "from the experience we have in dealing restaurant buyers, Bordeaux has not been the flavor of the month for some time. The overall awareness of wine types and regions leans heavily towards the New World."

The bi-polar Japanese market is also difficult to pigeonhole. "Napa may be popular as a tourist destination and coveted in the on-trade, but rarely does the average layman spend sufficient amounts to acquire Napa wine for consumption at home," according to James Dunstan of importer, The Vine. Conversely, adds Ned Goodwin, "Rioja offers a plethora of low-priced options available in the off-trade, yet is rarely seen in restaurants."

In the US most brand recognition has been created by advertising. "Places like Chianti, Chablis, and Champagne have been used as generic descriptions for so many wines that their geographical significance has gotten lost in time," says Michael Schaefer.

In short, the relationship between an owner's brand and regional awareness is often a source of confusion for the average consumer, who remains loyal only to a price point. In our next issue we will publish a more comprehensive analysis of brand awareness in ten key markets. What works where and why? ■

1 Brand Awareness in the USA				
	Prompted awareness		Penetration rate	
1	Napa Valley	90%	Napa Valley	60%
2	Bordeaux	70%	Sonoma	29%
3	Sonoma	70%	Washington	15%
4	Burgundy	62%	Bordeaux	14%
5	Champagne	62%	Oregon	13%
6	Chablis	60%	Chianti	12%
7	Chianti	57%	Burgundy	11%
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25	Margaret River	6%	Roussillon	1%
26	McLaren Vale	5%	McLaren Vale	1%
27	Penedés	3%	Penedés	1%

2 Brand Awareness in Japan				
	Prompted awareness		Penetration rate	
1	Champagne	45%	Bordeaux	17%
2	Provence	41%	Champagne	11%
3	Oregon	37%	Chianti	8%
4	Bordeaux	36%	Chablis	8%
5	Chianti	26%	Beaujolais	8%
6	Beaujolais	25%	Provence	7%
7	Chablis	25%	Côtes du Rhone	5%
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25	Penedés	6%	McLaren Vale	1%
26	McLaren Vale	6%	Margaret River	1%
27	Coonawara	5%	Penedés	1%

3 Brand Awareness in the UK				
	Prompted awareness		Penetration rate	
1	Bordeaux	90%	Bordeaux	33%
2	Champagne	85%	Rioja	31%
3	Burgundy	82%	Côtes du Rhone	24%
4	Chablis	76%	Burgundy	21%
5	Chianti	74%	Chablis	20%
6	Beaujolais	71%	Chianti	19%
7	Côtes du Rhone	68%	Champagne	18%
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25	McLaren Vale	8%	McLaren Vale	2%
26	Sonoma	8%	Sonoma	1%
27	Penedés	8%	Washington	1%

4 Brand Awareness in Germany				
	Prompted awareness		Penetration rate	
1	Bordeaux	89%	Bordeaux	40%
2	Champagne	82%	Beaujolais	23%
3	Chianti	77%	Chianti	22%
4	Beaujolais	70%	Rioja	21%
5	Prosecco	65%	Prosecco	20%
6	Provence	59%	Côtes du Rhone	12%
7	Côtes du Rhone	55%	Champagne	11%
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25	McLaren Vale	3%	Washington	0%
26	Coonawara	3%	Margate River	0%
27	Margaret River	2%	Sonoma	0%