Wine Label Attractiveness Perceptions by US and Australian Wine Consumers: A Case Study

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Key Words: wine label attractiveness, US wine consumers, and Australian wine consumers

Abstract

The purpose of this research is to determine the importance of label attractiveness to US and Australian wine consumers. Further, this research examines if there is a difference between how the US wine consumers and Australian wine consumers perceive the same wine labels. Survey research is used to examine differences between the US and Australian wine consumers in the importance of labels to them and the attractiveness of specific labels. Most of the consumers in both countries indicated that the appearance of the wine label is at least somewhat important when they purchase wine for use at home, a party, a bar, or a restaurant. However, the importance of label attractiveness for bottles purchased for consumption at home or a party is more important than for bottles purchased at a bar or restaurant in both countries. Approximately three-fourths of all bottles of wine were purchased for consumption at home in both countries. Three-fourths of US wine consumers and almost two-thirds of Australian wine consumers indicated that label attractiveness is at least somewhat important in their purchase decision. The survey respondents in both countries were provided with colored copies of the labels of nine of the top wines in the United States, according to IRI. A comparison of the ratings between the US and Australian consumers shows that they agree on the attractiveness of the top three labels. However, they disagreed on the attractiveness of two of the lower rated labels.

Background

The wine industries in the US and Australia have been growing at a rapid pace in the new millennium with large increases in domestic sales. In particular, wine volume sales in the US grew 18.7% during the period 2000 through 2005 (Global Market Information Database, 2006 a). The growth is attributed to new labels, new packaging, and greater availability making wine more accessible to mainstream American consumers (Global Market Information Database, 2006 b). Similarly, Australia experienced an 18.6% growth in volume sales during the period 2000 through 2005. (Global Market Information Database, 2006a). The increase in sales in Australia is attributed to a robust economy and the desire among consumers to switch from lower-end alcoholic beverages to wine, which is perceived as higher in value and status (Global Market Information Database, 2006 b).

The growth of wine sales in the US and Australia is driven by both new wine consumers and a growing preference for wine among existing wine consumers. Wine producers selling products in the US and Australia are attracting new consumers for their particular brands through the introduction of new labels, new products, and new packaging. The internet has made the variety of new and existing wines available to consumers. Secure financial information on an easily navigable web site is the most important information required by Australian consumers for purchases on the internet. (Bruwer and Wood, 2005).

In order to attract attention to their brands on retail shelves, wine producers are creating flashy, eye-catching packages (Franson, 2006). Research among European consumers indicates that the functional information consumers want shown on wine labels in order of importance is: year of bottling, locality of vineyard, years of aging, certification, and varietal. (Dimara and Skuras, 2005). Large consumer product corporations, such as Coca-Cola, have known for years the power of labeling their products with the purpose of attracting consumer interest in addition to providing functional information. The wine industry is now benefiting from the use of marketing research with respect to wine labels. Although taste is the most important factor for generating repeat purchase, packaging can impact the initial trial purchase of a wine product. (Merrill, 2006).

IRI (Information Resources Inc.) released the top 30 brand performers and the top 10 new brands for 2005 in the US (IRI, 2006). IRI is a leading provider of scanner based sales and shares of consumer packaged goods in the US and in numerous countries. The top 30 brand performers were evaluated based on volume growth, share of segment trends, merchandising effectiveness, front line pricing stability, profitability, distribution gains, incremental sales, and sales velocity growth. The top 10 new brands were evaluated based on dollar share. An examination of the labels of the top brands provides evidence that the wine industry is evolving and creating labels that are both functional and attractive. Many of the leading brands have interesting labels with pictures of animals and bright colors. The purpose of this research is to determine the importance of label attractiveness to US and Australian wine consumers. Further, this research examines if there is a difference between how the US wine consumers and Australian wine consumers perceive the same wine labels.

Methodology

Survey research was used to examine differences between the US and Australian wine consumers in the importance of labels to them and the attractiveness of specific labels. A survey instrument was administered through personal interviews during May 2006 to 260 wine consumers in the US and during February 2007 to 148 consumers in Australia. The survey was conducted among a random sample of wine consumers using the personal interview method in San Luis Obispo, California and Brisbane, Australia. San Luis Obispo County was designated the best test market in the United States by *Demographics Daily (*Jackoway, 2001). San Luis Obispo was found to be the best of 3,141 counties to represent a microcosm of the United States based on 33 statistical indicators.

A simulated test marketing methodology was used to evaluate the labels. Simulated test marketing research is a valid methodology that has been used by the marketing community since the 1960's to forecast purchase interest in new products and new positionings for existing products (Clancy 2006). This experiment uses a concept screen type of simulated test methodology (Clancy, 2006). Consumers rated the labels of nine of the top ten new wines and top ten overall wines based on shares reported by IRI on attractiveness. In a concept screen, consumers are shown numerous concepts to evaluate. For this research, consumers were shown pictures of wine labels and asked to rate them on attractiveness. Before the consumers rated the specific labels, they were asked the importance of a label in the purchase decision and the desirability of specific label characteristics. In addition, the consumers were asked questions concerning category behavior, demographics, and media usage.

Respondent Demographics

Wine consumer demographics in the samples from the US and Australia were surprisingly similar. The only difference observed between the consumer demographics was age. The Australian sample had significantly more consumers in the eighteen to twenty year age group. Alcohol consumption is legal in Australia for this age group, but not in the US.

Table 1 – Demographics

	U.S. N = 260	Australia N = 148	P Value
Age			
18 to 20	0%	13.5%	
21 to 23	22.3%	27.0%	
24 to 26	16.2%	18.2%	
27 to 29	9.6%	12.2%	
30 to 34	8.8%	6.1%	
35 to 39	7.3%	6.1%	
40 to 41	3.8%	1.4%	
42 to 49	9.2%	7.4%	
50 to 54	5.8%	4.1%	
55 to 60	3.5%	3.4%	
61+ years	3.5%	0.7%	0.006*
Gender			
Male	51.0%	43.9%	
Female	49.0%	56.1%	0.171
Marital Status			
Married/Cohabitating	47.2%	37.8%	
Single	51.6%	61.5%	
Widowed	1.2%	0.7%	0.150
Children under 18 living at home			
Yes	25.2%	20.4%	0.276
Employment			
Employed, full-time	53.3%	52.7%	
Employed, part-time	31.8%	32.9%	
Not employed/retired	14.9%	14.4%	0.971
Household income			
Under $20,000	28.4%	26.4%	

$21,000 to $24,999	3.6%	4.7%	
$25,000 to $29,999	4.8%	6.8%	
$30,000 to $34,999	4.4%	9.5%	
$35,000 to $39,999	9.2%	4.7%	
$40,000 to $49,999	6.4%	5.4%	
$50,000 to $59,999	8.8%	10.1%	
$60,000 to $69,999	8.4%	7.4%	
$70,000 to $99,999	13.6%	15.5%	
$100,000 or more	12.4%	9.5%	0.463

**Significant at the .05 level.

Media Use

In order to develop a promotion plan to generate awareness and trial for a specific wine brand, producers need to understand the media habits of their consumers. Approximately two-thirds of wine consumers in both Australia and the US read local newspapers often. More Australian consumers read a local newspaper at least once a month. A third of wine consumers from both countries read national newspapers on the internet often and a half read them at least once a month. Thus, newspapers are a good media vehicle to reach wine consumers in the US and Australia. The internet search engine, Google, was used by over half of wine consumers often in both countries. Social websites and MySpace, in particular, was used often by more than a quarter of consumers in the US and by more than a third in Australia. Further, over 90% of the wine consumers under the age of 30 report using MySpace or social web sites often. Thus, the internet is also a good media vehicle for generating awareness of specific brands and their labels. The internet is especially useful for generating awareness of specific wine labels among younger wine consumers in the US and Australia.

Table 2 Media Use

	U.S. N = 260	Australia N = 148	P Value
<u>Read/Visit at least once a month</u>			
Local Newspaper	72.5%	**84.9%**	0.005**
National Newspapers on the Internet	49.4%	55.2%	0.265
Google	59.3%	**72.3%**	0.01*
MySpace	25.0%	**39.6%**	0.002**
Social Website	19.9%	**38.2%**	0.000**
Wine Spectator Magazine	16.7%	14.2%	0.517
University Newspaper	29.8%	24.1%	0.230
<u>Read/Visit often</u>			
Local Newspaper	65.1%	65.6%	0.492
National Newspapers on the Internet	33.2%	30.6%	0.589

Google	53.8%	61.2%	0.148
MySpace	26.8%	28.7%	0.689
Social Website	18.3%	**26.4%**	0.058*
Wine Spectator Magazine	**6.7%**	2.1%	0.047**
University Newspaper	**22.2%**	12.1%	0.014**

**Significant at the .05 level. *Significant at the .10 level.

Category Behavior

Wine consumers indicated that they drink a variety of alcoholic beverages in addition to wine. The Australians were more likely to have purchased mixed drinks within the last year.

Table 3 Alcoholic Purchases with the Last Year.

	U.S. N = 260	Australia N = 148	P Value
Beer	86.9%	87.8%	0.798
Sparkling Wine	49.0%	51.4%	0.652
Mixed Drinks	62.8%	77.0%	0.003**
Other Alcoholic Beverages	37.2%	37.2%	0.999

**Significant at the .05 level. *Significant at the .10 level.

Australian and US wine consumers spent approximately the same and purchased the same number of bottles of wine in a typical month. Further, both groups of wine consumers allocated approximately three-fourths of the bottles purchased for consumption at home or party and a quarter were purchased at a restaurant or bar.

Table 4 Wine Purchasing Behavior.

Bottles Purchased and Dollars Spent	U.S. N = 260	Australia N = 148	P Value
Bottles of wine purchased in a typical month	4.5	3.6	0.144
Dollars spent on wine in a typical month ($US)	$40.63	$36.85	0.519
Allocation of bottles purchased by location of use			
Of last 5 bottles purchased for home/party	77%	76%	0.307
Of last 5 bottles purchased at restaurant/bar	23%	24%	0.739

** Significant at the .05 level * Significant at the .10 level

Wine Label Attractiveness

Consumers were asked two questions concerning the importance of wine labels in the purchase decision: "When purchasing a bottle of wine, *for home consumption or a party*, how important is the appearance of the label in your purchase decision?" and "When purchasing a bottle of wine, *at a bar or restaurant*, how important is the appearance of the label in your purchase decision?" The importance wine labels for consumption at home or party examines consumer evaluation of labels in the retail outlet or off-premise. Thus, it examines how purchasers evaluate wine labels in the retail environment to provide guidance to producers that distribute to retail outlets. While the importance of label appearance in a bar or restaurant examines the on-premise importance. Thus, it examines how purchasers evaluate wine labels in the on-premise environment to provide guidance to producers that distribute to restaurants and bars.

Most of the consumers in both countries indicated that the appearance of the wine label is at least somewhat important when they purchase wine for use at home, a party, a bar, or a restaurant. However, the importance of label attractiveness for bottles purchased for consumption at home or a party is more important than for bottles purchased at a bar or restaurant in both countries. Perhaps this is a result of the large number of different labels that are available in a retail environment compared to the on-premise environment. Or, the on-premise purchase environment is often from a menu or list and the label is not available for viewing during the purchase decision.

A higher proportion of consumers in the US indicated that wine label appearance is important in the purchase decision for a bottle of wine for consumption at home or a party. Approximately three-fourths of all bottles of wine were purchased for consumption at home or a party. Tthree-fourths of US wine consumers and almost two-thirds of Australian wine consumers indicated that label attractiveness is at least somewhat important in their purchase decision. Thus, it is important for wine producers to create attractive labels to enhance their sales.

Table 4 Wine Label Appearance Importance – For Home/Party Purchase

	US N = 260	**Australia N = 148**	**P**
Extremely Important	14.3%	9.10%	
Very Important	24.4%	20.9%	
Somewhat Important	36.4%	32.4%	
Extremely/Very/Somewhat	***75.10%***	***62.40%***	
Slightly Important	13.2%	18.2%	
Not at all Important	11.6%	18.2%	.013**

**Significant at the .05 level

Table 5 Wine Label Appearance Importance – Bar/Restaurant

	US N = 260	**Australia N = 148**	**P**
Extremely Important	9.6%	12.9%	
Very Important	18.8%	19.7%	
Somewhat Important	28.5%	22.4%	
Extremely/Very/Somewhat	***56.90%***	***55.00%***	

Slightly Important	20.0%	13.6%	
Not at all Important	23.1%	31.3%	.72

**Significant at the .05 level

Ratings of Specific Label Characteristics

A successful product positioning is based on the factors that motivate consumers to purchase one product versus other products. The product's label is one factor that represents a product's positioning. The label characteristics that consumers want when they purchase wine are examined by five point desirability ratings (Clancy, 1994). The five point desirability ratings have been validated empirically (Clancy, 1994).

In order to understand the specific label characteristics that are desirable to wine consumers, the respondents were asked to rate twenty characteristics of labels based on their desirability. They were asked the following question: "The following is a list of features people may look for in labels when purchasing wines. Please indicate the desirability of each feature of the label to you when you purchase wine by indicating a number from one to five where: 5 = Extremely Desirable; 4 = Very Desirable; 3 = Somewhat Desirable; 2 = Slightly Desirable; and 1 = Not at all Desirable."

The label characteristics that were perceived to be somewhat to very desirable are eye catching, attractive, interesting, unique, stylish, creative label, clever, colorful, looks sophisticated, artistic, label from a prestigious brand, and elegant. The characteristics that were evaluated to be somewhat desirable are the label characteristics: simple, romantic, looks like it is fun to drink, and has subtle colors. The label characteristics that were considered to be only slightly to somewhat desirability were funky, has an animal on it, does not contain a picture, and looks cartoon-ish.

Table 6 Desirability of Label Characteristics

Label Characteristics	Mean Value Based on a 5 Point Scale Converted to 100 Points N = 252	Paired Sample t- test P Value
Somewhat to Very Desirable		
Eye-Catching	76.72	
Attractive	75.98	0.238
Interesting	74.07	0.167
Unique	73.15	0.05
Stylish	72.35	0.316
Creative	70.80	0.322
Clever	70.64	0.967
Elegant	69.41	0.35
Sophisticated	69.17	0.811
Colorful	68.68	0.708
Artistic	68.16	0.666
Label from a prestigious brand	66.60	0.17
Somewhat Desirable		

Simple	64.46	.10*
Romantic	61.18	0.038**
Looks Like it is Fun to Drink	59.31	0.247
Has Subtle Colors	58.61	0.494
Slightly to Somewhat Desirable		
Funky	54.10	0.004**
Has an animal on it	48.12	0**
Does not contain a picture	43.42	0.003**
Looks cartoon-ish	39.61	0.006**

** Significant at the .05 level *Significant at the .10 level

A comparison was made of the desirability of the individual characteristics between the US and Australian consumers. The US consumers rate attractive more desirable. This rating is consistent with the higher importance of an attractive label indicated by the US consumers during a purchase decision for wine purchased for consumption at a home or party. Further, the US wine consumers rated labels that are colorful, romantic, and have an animal on it as more desirable; while Australian consumers rated labels that are simple higher.

Table 8 Desirability of Label Characteristics.

Label Characteristics	U.S. N = 260	Australia N = 148	P Value
Somewhat to very desirable			
Eye-Catching	76.31	77.43	0.588
Attractive	**77.73**	72.97	0.033**
Interesting	74.23	73.78	0.833
Unique	73.73	72.16	0.466
Stylish	72.62	71.89	0.736
Creative	70.87	70.68	0.929
Clever	70.77	70.41	0.871
Elegant	69.15	69.86	0.757
Sophisticated	70.23	67.30	0.193
Colorful	**70.69**	65.14	.006**
Artistic	69.27	66.22	0.195
Label from a prestigious brand	65.87	67.84	0.41
Somewhat desirable			
Simple	63.00	**67.03**	0.042**
Looks like it is fun to drink	60.46	62.43	0.455
Subtle	60.15	57.84	0.271
Romantic	**60.87**	54.73	.010**
Slightly to somewhat desirable			
Funky	53.67	54.86	0.638
Has an animal on it	**49.88**	45.14	.056*
Does not contain a picture	43.44	43.38	0.975

Looks cartoon-ish	40.77	37.57	0.147

** Significant at the .05 level * Significant at the 10 level

Ratings of Specific Wine Labels

The survey respondents in both countries were provided with colored copies of the labels of nine of the top wines in the United States, according to IRI. After examining each of the labels, respondents rated each one on its attractiveness. The respondents were told: "I am going to show you wine labels. Please indicate a number from one through five, which best describes the attractiveness of each label using the scale below:"

Table 8 Interval Rating Scaled used to Describe each Label

5 = Extremely Attractive
4 = Very Attractive
3 = Somewhat Attractive
2 = Slightly Attractive
1 = Not at all Attractive

Table 9 shows the mean attractiveness ratings achieved by each label. The labels that achieved the highest rating were Yellow Tail and Twin Fin. Twin Fin is the brand that was ranked by IRI as the number one brand of the top ten new brands based on dollar share in the US. The label has a picture of a classic convertible with a surfboard near the beach. Yellow Tail was ranked third overall brand by IRI and has a picture of a kangaroo. Interestingly, consumers rated a label with an animal on it as very low in desirability; however, they rated the attractiveness of Yellow Tail, with a kangaroo, high in attractiveness. Therefore, the actual kangaroo image was very attractive to the consumers; while the thought of an animal was not. Red Bicyclette, the sixth largest overall brand was rated third in attractiveness. It has a charming drawing of a man riding a bicycle. The labels that were rated somewhat to slightly attractive include Monkey Bay, 3 Blind Moose, La Crema, Dog House, Smoking Loon, and Barefoot.

Table 9 – Label Attractiveness – Total Sample

Specific Label	IRI Table Wine 2005 Rank	Mean Rating Based on 5 Point Scale N = 252	Paired Sample T-test P Value
Somewhat Attractive			
Yellow Tail ~ $6.00-$9.00	3 Top 30[2]	68.1373	
Twin Fin ~ $6.99-$10.99	1 *Top 10 New Brands*[1]	68.0882	0.97
Red Bicycletta ~ $8.99-$13.99	6 Top 30[2]	64.7643	0.009**
Slightly to Somewhat Attractive			
Monkey Bay ~ $6.49 - $11.99	2	58.8725	0**

	Top 10 New Brands[1]		
3 Blind Moose ~ $7.99 - $10.99	3 *Top 10 New Brands*[1]	57.9361	0.43
La Crema ~ $15.00 - $20.00	5 Top 30[2]	56.3636	0.361
Dog House ~ $8.99 – 10.99	*4* *Top 10 New* Brands[1]	56.3275	0.931
Smoking Loon ~ $7.99 - $8.99	1 Top 30[2]	54.938	0.307
Barefoot ~ $5.99 - $8.99	4 Top 30[2]	53.6609	0.396

** Significant at the .05 level * Significant at the .10 level

[1] Based on dollar share (IRI 2006).

[2] Based on volume growth, share of segment trends, merchandising effectiveness, front line pricing stability, profitability, distribution gains, incremental sales, and sales velocity growth. (IRI 2006).

A comparison of the ratings between the US and Australian consumers shows that they agree on the attractiveness of the top three labels. However, the US consumers rated 3 Blind Moose as less attractive than the Australians and the Australian wine consumers rated Barefoot significantly lower than the US consumers. The US consumers ranked Barefoot as the fifth most attractive label while the Australian consumer ranked it lowest in attractiveness. It appears that the Australian consumers perceived that the Barefoot label did not reflect the higher value or status of wine compared to other labels.

Table 10 – Label Attractiveness – Differences Between Countries

Specific Label	**US N = 260**	**Australia N = 148**	**P**
Somewhat Attractive			
Yellow Tail ~ $6.00-$9.00	67.23	69.73	0.247
Twin Fin ~ $6.99-$10.99	69.31	65.95	0.144
Red Bicycletta ~ $8.99-$13.99	65.18	64.05	0.588
Slightly to Somewhat Attractive			
Monkey Bay ~ $6.49 - $11.99	57.62	61.08	0.144
3 Blind Moose ~ $7.99 - $10.99	56.10	**61.20**	0.021**
La Crema ~ $15.00 - $20.00	57.2	54.8	0.352
Dog House ~ $8.99 – 10.99	55.00	54.50	0.336
Smoking Loon ~ $7.99 - $8.99	55.14	54.59	0.688
Barefoot ~ $5.99 - $8.99	**56.20**	49.10	0.054*

** Significant at the .05 level * Significant at the .10 level

Summary

The US and Australian wine consumers examined have similar demographics, except for age. Since the legal drinking age in Australia is eighteen, the Australian wine consumers are younger. A third of wine consumers from both countries read national newspapers on the internet often and a half read them at least once a month. Thus, newspapers are a good media vehicle to reach wine consumers in the US and Australia to inform them of specific wine labels. Further, the internet is used by most wine consumers and social networks on the web are used often by wine consumers under thirty years old. The internet is a good marketing vehicle to reach the under thirty wine consumer.

The consumers in both countries indicated that they spend similar amounts on wine and purchase a similar number of bottles in a typical month. Off-premise consumption of wine represents three-fourths of the bottles purchased by consumers in both the US and Australia. Wine consumers in both countries indicated that the appearance of the label is more important to them when purchasing a bottle of wine for home consumption or a party, than when purchasing it for consumption in a bar or restaurant. Since approximately three-fourths of all bottles of wine are purchased for consumption at home, and three-fourths of US wine consumers and almost two-thirds of Australian wine consumers indicate that label attractiveness is at least somewhat important in their purchase decision; it is important for wine producers to produce attractive labels to enhance their sales.

The label characteristics that achieved the highest desirability ratings were eye catching, attractive, interesting, unique, stylish, creative label, clever, colorful, looks sophisticated, artistic, label from a prestigious brand, and elegant. The labels that achieved the highest rating on attractiveness were Yellow Tail and Twin Fin. Twin Fin is the brand that is ranked as the number one brand of the top ten new brands based on dollar share by IRI for the US market. The label has a picture of a classic convertible with a surfboard near the beach. Yellow Tail is ranked third overall brand by IRI and has a picture of a kangaroo. Both US and Australian consumers were attracted to the kangaroo. Red Bicyclette, the sixth largest overall brand was rated third in attractiveness. It has a charming drawing of a man riding a bicycle.

A comparison of the ratings between the US and Australian consumers shows that they agree on the attractiveness of the top three labels. However, the US consumers rated 3 Blind Moose as less attractive than the Australians and the Australian wine consumers rated Barefoot significantly lower than the US consumers. The US consumers ranked Barefoot as the fifth most attractive label while the Australian consumer ranked it lowest in attractiveness.

This research indicates that wine consumers in both the US and Australia include the label attractiveness as a factor in the purchase decision for wine. Consumers in the US indicated that it is more important than consumers in Australia. Thus, before launching a new wine product in both the US and Australia, it is recommended that the winery perform consumer research on the attractiveness properties of the new label. In order to inform wine consumers about new wine labels, a variety of media will need to be used including newspapers and the use of internet sites, especially for younger wine consumers.

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