

Yellow Tail Brand Audit Final

I. INTRODUCTION

Yellow Tail is an Australian wine brand that has become a household name in the wine industry, renowned for its affordable, easy-drinking wines. The brand was launched in 2001 by John Casella, who had been involved in the wine business for over 20 years as a member of the board of trustees of Casella Family Brands. Casella Family Brands was founded in 1969 after Fillipo and Maria Casella immigrated to a vineyard in Australia and began making wines. Yellow Tail is the most popular wine brand of the Casella Family Brands, over-selling Brands Laira, Morris of Rutherglen, Young Brute, and Casella. The company stands as an acquisition company for many alcoholic beverage brands as a way to maintain a pipeline of revenue to their name. Soon after the brand's creation, Yellow Tail wines were primarily exported to the United States, where they quickly gained a loyal following. Yellow Tail expected to sell 25,000 cases of wine in the US in their first year. America's love for the brand exceeded their expectations and Yellow Tail's sales grew by over one million cases in the first 13 months on the market.

The name "Yellow Tail" was inspired by the YellowTail fish, which is known for its lively, playful nature and is found off the coast of Australia. Yellow Tail's brand identity seeks to mimic this lively and playful nature in its marketing campaigns, lightly flavorful wine selection, and bubbly personality. The brand's success in the US was largely due to its unique marketing strategy, which emphasized the casual, approachable nature of the wines. Yellow Tail's bright, bold packaging and humorous advertising campaigns stood out in a crowded market and helped to differentiate the brand from its stuffier competitors. Today, Yellow Tail is one of the world's largest wine brands, with products available in over 50 countries worldwide. In 2020, Yellow Tail reported revenues of approximately \$1.4 billion, making it one of the most profitable wine

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brands globally. Yellow Tail's growth has been driven in part by its success in the United States, where it remains the top-selling imported wine brand. According to data from Nielsen, Yellow Tail has consistently held a market share of around 10% in the US wine market, far outpacing its closest competitors. The brand's continued success in the US can be attributed to its broad appeal - Yellow Tail wines are priced affordably, making them accessible to a wide range of consumers, and their easy-drinking style makes them a popular choice for casual occasions.

Despite its massive success, Yellow Tail has faced criticism from some corners of the wine industry for its perceived lack of complexity and quality. The brand's wines are often described as "simple" or "uncomplicated," and some wine experts have dismissed them as mass-produced products that prioritize consistency over character. However, these criticisms can be seen from the opposite perspective and highlight Yellow Tails' proposition of making wine less complex and more approachable for the beginner wine drinker. Rather than change all of the brand's wines to fit this mold that all wine must be complex and unforgiving, Yellow Tail has made efforts in recent years to address these concerns and improve the quality of its wines solely in specialty bottles. The brand has invested in new vineyards and wine production facilities, and has begun to focus on producing higher-end wines that appeal to more discerning consumers. In 2020, the brand launched a new line of premium wines called "The Reserve," which are made from grapes grown in select vineyards and aged in oak barrels.

Yellow Tail has become one of the most successful and recognizable wine brands in the world, with a market position and brand recognition that is unparalleled in the wine industry. While it has faced criticism for its perceived lack of complexity, the brand's continued success

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suggests that its approachable, affordable wines will continue to appeal to a broad range of consumers.

II. CONSUMER-BASED BRAND EQUITY MEASUREMENT

A. Brand Image for Value Wine

This can be due to the large number of young adults who took the questionnaire. 65.38% of respondents to the survey are in the 18-24 age range and 42.72% recorded their employment status as 'student'. Because of the young age and lack of employment which subsequently leads to cheaper tastes, there will naturally be a focus on affordability throughout the survey. Additionally, the age range of the respondents leads to a slight distaste for wine as a whole, 30.00% of the respondents do not regularly drink wine and 23.00% of the respondents drink wine less than once a month. Because of the inconsistency of the majority of the respondents of the survey with the wine industry, the results of the survey may be skewed with various inconsistencies.

Yellow Tail's slogan of "Great Wine For All" perfectly aligns with its desired brand image of accessibility and affordability. Additionally, Yellow Tail finds innovative ways to personally connect with their consumers such as special recipes on their website which help customers associate a fun, creative, and daring time with their brand. Because Yellow Tail is an affordable wine brand, they intend for their customers to purchase their product frequently and not just on special occasions as one would with a luxury wine brand. To entice customers to purchase Yellow Tail frequently, they must have memorable characteristics as well as consistent product quality.

B. Recall and Brand Associations

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Yellow Tail has a weak brand recall, which is balanced out by strong brand associations. In a list of competing wine brands' logos with the name taken off the image, Yellow Tail was recognized second for 42.62% of survey respondents after Barefoot. This indicates that respondents of the survey can recognize the brand yet they recall Barefoot sooner and stronger than they recall Yellow Tail. This can hurt Yellow Tail's sales in the situation of a grocery or liquor store, where many different wines are displayed near each other. If shoppers recall Barefoot sooner they may be more likely to purchase that brand over Yellow Tail.

The survey exposed that Yellow Tail's most common brand association is consistency. Consistency is an important aspect of Yellow Tail's brand because its revenue structure relies on being bought frequently. Customers are more likely to buy a product more often when they can trust both the brand and the product. 31.03% of the respondents claim that they believe Yellow Tail is a consistent brand in comparison to the next highest brand association which is 11.49% of respondents claiming that Yellow Tail is relevant to them. This is another statistic that could be because of the young adult age range of the respondents of the surveys. Because Yellow Tail is an affordable wine brand, many young people may feel like the brand speaks to them and their financial situation. Although younger people may feel this, it is also still relevant to older people through their product diversification with *The Reserve*, quality, and branding of "Great Wine For All".

Next, the following highest brand associations are unique and spirited, which sit at 10.34% and 5.75% respectively. While these qualities are both beneficial to the brand identity, they are arbitrary and can not be specifically tied back to the qualities of the wine itself, just the way that the brand makes its consumers feel. Nonetheless, 59.38% of respondents reveal to

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consider Yellow Tail for their next wine purchase. Despite these many positive brand associations, there are naturally some negative brand associations that were revealed through the survey. Some respondents reflected their disliking of Yellow Tail's taste and others say that they prefer competing brands such as Barefoot. This can be due to the respondents of the survey who expressed a disliking towards wine in general and typically only drink it every once in a while for social occasions. Additionally, many of the respondents are only a few years into their drinking age and do not have an acquired taste for wine products. Despite this, many individuals responded favorably towards Barefoot, this shows that while non-drinkers do not have a particular preference for Yellow Tail, they still are aware of other brands within the industry and like certain aspects of these brands' images, logos, or packaging better.

III. Brand Valuation

Yellow Tail's brand value per the Premium Earnings Methods was estimated to be \$325.864 million Due to Yellow Tail being a private company, their financials were inaccessible beyond a paywall, so Casella Family Wine's data was used as a placeholder at times. All of the following inputs are described in the associated Appendix B3. Discussing the inputs, revenues were determined from Drinks Digest where Casella Wines reported revenue of 2020 totaling \$518.38 million (House, 2021). A sales growth of 6% was determined by how much revenues had risen from the year prior (\$491.035 million in 2019) and operating income was also sourced from the same Drinks Digest article where profits were reported as \$48.75 million (House, 2021). Brand contribution index was estimated to be 80% and the growth rate at perpetuity (2.7%) was based on data from "U.S. GDP Growth Rate 1961-2023" (2023). Due to the high volume of vineyards, wine manufacturing plants, and distribution centers, tangible assets were

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estimated to be \$140.9 million. Finally, to determine the brand discount rate, Yellow Tail's Brand Strength score was estimated based on the factors: protection, geography, support, trend, leadership, stability, and market. Descriptions for each factor and a chart of the percent results of each category can be viewed in Appendix B4. Yellow Tail's brand score was calculated to be 79, indicating they are a strong brand and correlating to a roughly 9% discount rate. Protection (scored 3/5) was determined by the fact they do hold trademarks over their signature kangaroo and brand name, while also having defended it in the past against brands like Little Roo, for example, who mirrored a similar mascot and color scheme (Harris, 2011). Geography was scored 20/25 due to their ranking in the Wine Intelligence Global Wine Brand Power Index being number 1 in 2022 and 2021 (Dodd, 2022). A slight decrease in score was due to the fact that over 50% of Yellow Tail's sales come from US markets (Lawati, 2022). Support was scored a 7/10 as they consistently push the wine-beginner friendly narrative, but have, at times, inconsistent imagery in markets like the U.K. for example where they present refinement. Trend, stability, and market were ranked a 8%, 12%, and 8% respectively due to Yellow Tail's easy to adopt flavor profile drawing in younger consumers and the wine market's projected compound annual growth rate (CAGR) of 6.4% from 2021 to 2028, of which they have carved out a strong niche due to their blue ocean strategy (Grand View Research, 2019). Leadership was ranked 21/25 due to the intelligent brand positioning of Yellow Tail in a highly competitive market and the launch of a global wine powerhouse with numerous varieties. The only marks off were due to the failure to stifle growing competition from similar brands like Barefoot and Trader Joe's brands.

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IV. Marketing Strategy

One of the main challenges that Yellow Tail faced during its entry into the U.S. wine market was creating a unique brand image in the mind of the consumers, as there was heavy competition in the market from more popular wine brands from Italy, Chile, and California. As a relatively young import brand, Yellow Tail faced steep competition from American-borne brands and even more well-established European wineries- in other words, they were walking into a Red Ocean, a market already chock full of competitors. Rather than attempting to enter the same market as their competitors Yellow Tail took a different route and created their own market- a Blue Ocean strategy.

Blue Ocean marketing strategies pursue differentiation by creating a low-cost market segment for a pre-existing product. Yellow Tail deviated from its higher-cost and more luxuriously branded competitors by launching their wines in the Value Wine pricing segment (see Appendix B2) and generating a more casual, laid-back brand image to match the price. In creating their own market, Yellow Tail also freed itself from the marketing constraints of its would-be competitors in the premium wine segment, which depend on highly specific attributes (ie. county/vineyard of origin, specific grape varieties, etc) and an air of mystery to market their products (StartupFactory, 2022). They pivoted instead towards making their wines easy to understand for wine novices and entirely casual drinkers, a consumer segment that premium and super-premium brands had previously overlooked.

Early on in their market research of this previously untargeted consumer segment, Yellow Tail found that most of these more casual drinkers were less interested in complex flavors or high tannin levels in their wines as compared to higher-end wine enthusiasts, and were thus more

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likely to go for sweet, easy-to-drink wines. As a result, Yellow Tail wines were formulated to be sweeter and less tannic across the board than its higher-end competitors. Alcohol level was also kept somewhat low, increasing the drinkability of their wines. This also created an appeal for consumers that would previously have gone for low-alcohol drink mixes and cocktails, as well as mocktails (StartupFactory, 2022). Overall, Yellow Tail's marketing strategy appealed to a new segment of consumers which were underserved by the existing wine industry by launching an easy-to-drink, sweeter wine at the lowest possible price point. It disregarded any notions of luxury or exclusivity in favour of marketing for accessibility and casual enjoyment.

This strategy also aligns with Yellow Tail's overall brand identity of being spirited, unique, daring, bright, and fun. Its resulting product offerings are also diverse in that they cover most major categories of reds, whites, and blends. Yellow Tail boasts a range of 25 wines from 11 grape varieties (Moscato, Riesling, Semillon, Sauvignon blanc, Pinot gris, Chardonnay, Pinot noir, Merlot, Grenache, Shiraz and Cabernet Sauvignon). Regardless of what specific varietal it is, the average price for a regularly sized bottle of Yellow Tail wine is \$4.97, which often places it as the cheapest wine in any given liquor or grocery store. Its branding and advertisements typically feature bright colors (such as Yellow Tail's signature chrome yellow) and positive wording, emphasizing adventure, personal happiness, and good times spent with friends (connecting back to the positive and socially active brand association explained above). Compared to other wine brands, which tend to lean toward a brand personality of quiet luxury and high-class enjoyment, Yellow Tail promotes itself as a laid-back, easygoing choice for almost any occasion. This highly differentiated, low-cost approach has afforded Yellow Tail a

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permanent spot on the shelves, and has earned the brand a top spot as the most imported wine in the United States.

A. Four P's of Marketing

1. **Product:** Large variety of cheaply priced wine, with brightly colored, simplistic branding.
2. **Placement:** Highly accessible in most liquor and licensed grocery stores. Typically placed in the lower-middle or bottom-shelf, depending on the side of the wine aisle.
3. **Price:** Value wine, average cost is \$4.97 or slightly higher, depending on store location.
4. **Promotion:** Branding is generally focused on portraying a vibrant, lively lifestyle for its consumers. Brand color scheme revolves around a chrome yellow, and with an abstract image of a kangaroo serving as the logo. Website and social media branding are similar. TV and media ads are rare, which aligns with industry norms. Promotion takes place largely through consumer word-of-mouth, pre-existing brand awareness, and in-store sales.

The last large-scale marketing campaign Yellow Tail ran focused largely on the “product” aspect of the four P's. The 2013 *Discover Your Colour* campaign saw the mass re-labeling of Yellow Tail wines, with each type of wine having a differently colored label. The goal of this rebranding was to establish Yellow Tail as a “fun and vibrant brand” (Davidge), likely aiming to appeal to younger adults who are just coming into their own, and may soon attend to host events in which wine is a necessity.

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B. Social Media Presence

Yellow Tail has a semi-active social media presence that spans its two largest markets- the US market, and the UK/Australian market. Key differences in the marketing strategies shown by these accounts reflect the demographic and psychographic differences between their respective geographic markets.

The United States account projects a welcoming and bright personality through posting media of people smiling, gathering, and enjoying the wine. Many of the posts are yellow and other bright colors which stand out among other posts, and either highlight or match the wine in the images. Yellow Tail's US Instagram page, which seems to be their only verified account, is half comprised of images of women enjoying a glass of wine, either alone (ie. relaxing on the couch with a facial treatment on, having a glass in the shower) or toasting with friends. The other half of the page consists of images of wine glasses and bottles next to food pairings or screenshots of Twitter jokes associated with wine against a chrome yellow background (the brand's signature color). The posts on their US page alternate between these two types of images, creating a sleek, yet whimsical feel, and seem to cater to a largely or fully female audience.

By comparison, the brand's UK page is a mosaic: each post is one piece of a larger image, which seems to be table settings in varying colors, each corresponding to a Yellow Tail wine with a label of that color. The result is a much more sophisticated, refined appearance, with every post being part of a larger whole. Scrolling further down the page past the first 33 images¹ show further consistency, with each row of posts corresponding to one another. The general theme of the UK page is much more "put together", less sporadic than its US format, which

¹ Note: Instagram pages are formatted in columns of 3. The larger image being described takes up 11 total rows on the page.

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indicates the brand's awareness of the different market segments between the two countries. Posts that do feature people tend to include men and women about equally. It would appear that the UK market, while smaller, responds better to more refined imagery generally devoid of people, focusing on food pairings. It is also more gender-neutral than the US page, featuring both men and women. By comparison, the US market is much larger (which corresponds to the brand's popularity in the US wine market) and responds best to humor and female-targeted ads.

On their website, the company prioritizes that Yellow Tail is a welcoming and socially-oriented brand. Their landing page to the American section of the site is bright yellow and has a large welcome wording across the screen. Once scrolling down the site, the different types of wines are listed where the user can click on each wine and see the different flavors and descriptions. This easily shows consumers the different wines and helps people learn. This shows that Yellow Tail is a place for everyone, both wine lovers and people just beginning their wine journey.

Yellow Tail also invests in other forms of media and advertising by buying out ad space during the Super Bowl to increase brand awareness as there are **113 million** viewers in the United States alone.

V. Brand Recommendations

The first way that Yellow Tail can improve their brand is to engage beginning drinkers that should be drinking their wine because of the price, but through the discovery questionnaire we have noticed they are drawn to competing low-price wine brands. In order to do this, we suggest a social media campaign, as it will both build their online brand awareness and speak directly to the young audience they are targeting. The campaign will be titled

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#FirstSipWithYellowTail. The target audience of the campaign is rising 21 year olds, as this is who YellowTail seeks to turn into Yellow Tail drinkers. The challenge entails 21 year olds posting drinking YellowTail product as their first sip on their birthday and using the #FirstSipWithYellowTail. By using the hashtag, all of the content by the people who have posted will be in one area where consumers can see all the young people who are enjoying YellowTail on their special day. Additionally, this campaign will invite people to drink Yellow Tail at their special occasions therefore making the brand part of people's memory of happy days and events. Because the campaign directly targets millennials, a possible downfall that it could bring to the brand is giving the brand the perception that it is wine for younger people which directly goes against Yellow Tail's slogan 'Great Wine for All'. The following campaign will also be run to combat this possible problem.

The second campaign is based on the idea of flights of drinks at a bar. People do flights in order to try many different variations of drinks because it allows them to discover new preferences. Yellow Tail will create packages with small bottles of wine so customers can try many different Yellow Tail products in one purchase. Selling the product in smaller packages gives customers less risk in trying a product because if they do not like the product, there will be less waste and less money spent. Flights are also a great social event. Because YellowTail features so many social events on their social media and brings a social aspect into their brand identity, the flights are encouraged to be consumed with friends and family, making it a fun experience to see which variations of Yellow Tail everyone likes best. Furthermore, encouraging YellowTail wines in social settings will increase Yellow Tail's brand association with fond

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memories in consumers' thoughts, making Yellow Tail products have an advantage over other competing wine brands.

The flight will include some of Yellow Tails' affordable wines as well as a small bottle of 'The Reserve' collection. A bottle from 'The Reserve' is included because it allows the customer to try a more luxurious wine at a more affordable price because of the size of the bottle. This method piques consumer interests in Yellow Tail's luxury wines rather than allowing opportunity for competing brands to market their luxury wines to these consumers - Yellow Tail is maintaining brand loyalty while diversifying loyal customers' purchasing habits. Loyal customers are a major point in growth for Yellow Tail because they will show that the brand has an identity and is more than just cheap wine, and this will legitimize older adults and passionate wine drinkers perceptions of the brand. The flights emphasize Yellow Tail's slogan of 'Great Wine for All' because it includes many different types of wine showing that its purpose is for everyone to find a Yellow Tail product they enjoy.

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VI. APPENDIX

A. Survey

D1 - How old are you?

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	How old are you?	1.00	7.00	2.64	1.26	1.59	104

#	Answer	%	Count
1	Under 18	3.85%	4
2	18-24 years old	65.38%	68
3	25-34 years old	11.54%	12
4	35-44 years old	8.65%	9
5	45-54 years old	3.85%	4
6	55-64 years old	5.77%	6
7	65+ years old	0.96%	1
	Total	100%	104

D2 - What best describes your employment status over the last three months?

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	What best describes your employment status over the last three months?	1.00	7.00	3.06	1.92	3.71	103

#	Answer	%	Count
1	Working full-time	38.83%	40

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2	Working part-time	11.65%	12
3	Unemployed and looking for work	2.91%	3
4	A homemaker or stay-at-home parent	1.94%	2
5	Student	42.72%	44
6	Retired	0.00%	0
7	Other	1.94%	2
	Total	100%	103

D3 - How do you describe yourself?

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	How do you describe yourself? - Selected Choice	1.00	4.00	1.63	0.59	0.35	103

#	Answer	%	Count
1	Male	41.75%	43
2	Female	54.37%	56
3	Non-binary / third gender	2.91%	3
4	Prefer to self-describe	0.97%	1
5	Prefer not to say	0.00%	0
	Total	100%	103

D3_4_TEXT - Prefer to self-describe

Prefer to self-describe - Text

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Just a guy doin' things

Q27 - Do you drink wine?

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Do you drink wine?	1.00	2.00	1.67	0.47	0.22	101

#	Answer	%	Count
1	No	32.67%	33
2	Yes	67.33%	68
	Total	100%	101

28 - Which option best describes how often do you drink wine?

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Which option best describes how often do you drink wine?	1.00	5.00	2.47	1.27	1.61	100

#	Answer	%	Count
1	Never	30.00%	30
2	Once a month	23.00%	23
3	2-4 times per month	25.00%	25
4	2-3 times per week	14.00%	14
5	4+ times per week	8.00%	8

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	Total	100%	100
Q29 - Which of the following reasons describe why you drink wine?			
#	Answer	%	Count
1	I enjoy the taste	31.82%	42
2	It's a stress reliever	12.88%	17
3	It pairs well with food	26.52%	35
4	It makes me happy	28.79%	38
	Total	100%	132

Q3 - What wine brands come to mind when you are purchasing wine?

Brand #1	Brand #2	Brand #3
barefoot		
Barefoot		
Namaste	Butter	Prisoner
Wither hills	Hahn	Bodegas contador
Decoy	López	Trader Joe's wine
Yellowtail	That foot wine	Something French
Gravelly Ford	Espiral	Charles Shaw
Barefoot		
Frontera	Josh	Barefoot
Franzia	Yellowtail	Black box
Yellow tail	Sutter home	Kendall Jackson
Ken wright cellars	Kistler	Freixenet

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Coyote Moon	Barefoot	
Barefoot	Beringer	Yellow tail
barefoot	josh	yellowtail
yellow tail	la marca	barefoot
Yellow Tail	Barefoot	Kendall Jackson
Barefoot	Chateau Ste Michelle	Trader Joe's (???)
Barefoot	Moscato	Screaming Eagle
Yellow tail	Chisholm trail	Beringer
Barefoot	Don't know	Don't know
Kendal Jackson	Cakebread	Mondavi
i dont know any	na	na
Barefoot	Riunite	Moet
Fat frog	Red cat	Moscato
barefoot	starborough	whispering angel
Barefoot	Redcat	Sweet red frog
Chateau St. Michelle	Chateau d'Esclans	Charles Shaw
Barefoot	Yellowtail	Not sure
Yellowtail	Slizz	Jungle Juice
Little Giant	Penfolds	Elephant in the room
Winking owl	Josh	Yellow tail
Decoy	Coppola	Barefoot
Yellow Tail	Barefoot	Mondavi
Naked wine	Kirkland products	Local products
Antinori	J. Lohr	Victoire
Stag's Leap	Folinari	Ch. LaFitte Rothschild
Dr L	Campo Viejo	San Gregorio
Sonoma Piper	Cloudy Bay	Mouton Rothschild

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Auteur	Verite	Aubert
Austin Hope	Trader Joe's	Herman Story
Domaine Leroy	Domaine Fourrier	Daniel Defaix
Domaine de Romanee Conti	Coche Dury	Chateau Figeac
Au bon climat	Tablas creek	Lopez de heredia
Domaine de la Romanee Conti	Chateau Latour	Jacques Selsosse
Barefoot	3 finger jack	Fanzia
Barefoot	Yellowtail	Franzia
Bearfoot	Yellow tale	Moët
Yellow tail	Joseph Drouhin	Mionetto
Barefoot	Ménage trois	Riunite
Barefoot	yellowtail	cupcake
NA	NA	Na
14 Hands	Barefoot	Franzia
Barefoot		
Barefoot	Fruitscato	Cupcake
Barefoot	YellowTail	Boxed Wine
Yellowtail	Sutter Home	Kendall Jackson
Barefoot		
Rinutti	Barefoot	Sutter hill
Menage a Trois	Marca	Dark Horse

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Q35 - Rank these brand images in order of familiarity

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	IM_9BMMzG9CBvLWYjY	1.00	10.00	1.68	1.38	1.90	62
2	IM_bezVInrVCq33Ifs	0.00	5.00	2.44	1.08	1.16	61
3	IM_eqHsuIy91DKaWge	0.00	5.00	3.62	0.91	0.84	60
4	IM_b8AZWB7hm5BFUoK	0.00	6.00	2.35	1.17	1.37	63
5	IM_9Fz7LzdOsMio1oi	0.00	6.00	4.53	0.97	0.95	60

#	Question	1		2		3		4		5		Total
1		62.30%	38	27.87%	17	6.56%	4	0.00%	0	3.28%	2	61
2		20.00%	12	28.33%	17	40.00%	24	6.67%	4	5.00%	3	60
3	IM_eqHsuIy91DKaWge	1.69%	1	5.08%	3	27.12%	16	55.93%	33	10.17%	6	59
4		21.31%	13	42.62%	26	22.95%	14	8.20%	5	4.92%	3	61
5		1.72%	1	1.72%	1	1.72%	1	25.86%	15	68.97%	40	58

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Q4 - Select any of the following brands of wine from the above category that you have heard of before today. Please select all that apply.

#	Answer	%	Count
1	Yellow Tail	29.56%	60
2	Barefoot Wine	32.02%	65
3	Franzia	22.66%	46
4	La Marca	9.85%	20
6	Waistcoat Wines	1.97%	4
8	None of these	3.94%	8
	Total	100%	203

Q8 - In which of the following places have you seen advertisements for each of these brands in the past 30 days? Select all that apply.

#	Question	TV		Radio		Billboard		Print		Social Media		Website		Search engine		Grocery App		Word of Mouth		Other		None		Total
1	Yellow Tail	8.24 %	7	1.18 %	1	3.53 %	3	7.06 %	6	8.24 %	7	4.71 %	4	4.71 %	4	10.59 %	9	12.94 %	11	5.88 %	5	32.94 %	28	85
2	Barefoot Wine	6.98 %	6	1.16 %	1	3.49 %	3	5.81 %	5	9.30 %	8	4.65 %	4	2.33 %	2	10.47 %	9	15.12 %	13	10.47 %	9	30.23 %	26	86
3	Franzia	4.08 %	2	0.00 %	0	0.00 %	0	6.12 %	3	4.08 %	2	2.04 %	1	2.04 %	1	6.12 %	3	16.33 %	8	10.20 %	5	48.98 %	24	49
4	La Marca	3.45 %	1	0.00 %	0	3.45 %	1	6.90 %	2	6.90 %	2	3.45 %	1	6.90 %	2	10.34 %	3	20.69 %	6	6.90 %	2	31.03 %	9	29
5	Waistcoat	0.00 %	0	25.00 %	1	0.00 %	0	0.00 %	0	0.00 %	0	0.00 %	0	0.00 %	0	0.00 %	0	0.00 %	0	0.00 %	0	75.00 %	3	4

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	Win es																							
6	Non e of these	0.00 %	0	0.00 %	0	0.00 %	0	0.00 %	0	0.00 %	0	0.00 %	0	0.0 0%	0	0.0 0%	0	0.0 0%	0	0.0 0%	0	0.0 0%	0	0

Q30 - How much are you willing to pay for a bottle of wine?

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	How much are you willing to pay for a bottle of wine?	1.00	6.00	2.95	1.67	2.79	64

#	Answer	%	Count
1	\$10 or less	12.50%	8
2	\$11-20	45.31%	29
3	\$21-30	17.19%	11
4	\$31-40	3.13%	2
5	\$41-50	3.13%	2
6	More than \$50	18.75%	12
	Total	100%	64

Q6 - Category: Wine Which of the following brands would you consider for your next purchase in the above category? Please select all that apply.

#	Answer	%	Count
1	Yellow Tail	27.78%	25

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2	Barefoot Wine	32.22%	29
3	Franzia	6.67%	6
4	La Marca	6.67%	6
5	Wine Wire	0.00%	0
6	Waistcoat Wines	0.00%	0
7	None of these	26.67%	24
	Total	100%	90

Q36 - Would you consider purchasing Yellow Tail wine?

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	Would you consider purchasing Yellow Tail wine?	1.00	2.00	1.41	0.49	0.24	64

#	Answer	%	Count
1	Yes	59.38%	38
2	No	40.63%	26
	Total	100%	64

Q9 - Which of the following represent reasons you would not consider Yellow Tail? Select all that apply.

#	Answer	%	Count
1	Price	2.56%	1

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2	Poor quality	43.59%	17
3	Doesn't meet my needs	12.82%	5
4	Past experiences	7.69%	3
5	Loyalty to another brand	7.69%	3
6	Negative shopping experience	0.00%	0
7	It's not a brand for people like me	20.51%	8
8	Not available {near me}	0.00%	0
11	Other	5.13%	2
	Total	100%	39

Q9_11_TEXT - Other

Other - Text

I don't drink wine. More of a beer or vodka kind of person.

Don't drink

Q30 - How likely are you to purchase from a brand other than Yellow Tail?

#	Field	Minimum	Maximum	Mean	Std Deviation	Variance	Count
1	How likely are you to purchase from a brand other than Yellow Tail?	1.00	5.00	3.88	1.09	1.18	65

#	Answer	%	Count
1	Extremely unlikely	4.62%	3
2	Very unlikely	3.08%	2
3	Not sure	29.23%	19

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4	Very likely	26.15%	17
5	Extremely likely	36.92%	24
	Total	100%	65

Q29 - Category: Wine Which of the following brands in the above category, if any, have you consumed in the last 1 week?

#	Answer	%	Count
1	Yellow Tail	8.33%	6
2	Barefoot Wine	9.72%	7
3	Franzia	4.17%	3
4	La Marca	1.39%	1
5	Wine Wire	0.00%	0
6	Waistcoat Wines	1.39%	1
7	None of the above	75.00%	54
	Total	100%	72

Q13 - Please share any thoughts, opinions, or feelings about Yellow Tail.

Please share any thoughts, opinions, or feelings about Yellow Tail.

It's cheap, low quality wine. You easily can get better quality for similar price points

Good price point and easy to pick up just about anywhere (grocery stores, Target, etc.).

I would consider it finer quality than barefoot or Franzia. They have basic, get-the-job-done wines. There is nothing of exception that sticks out to me aside from affordability. I associate them with "wine moms."

I don't know it

Nothing in particular. Just like the kangaroo logo.

Australian I think.

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It's smooth and goes good with food, plus the women in my life like it the best

I just know it's cheap

its low quality and causes hangovers

It's ok but not my go to wine

indifferent

It goes well with my morning commute

I like your sparkling wines :-) they're pretty good quality for the price

Wine that college girls bring to parties

Good value for the product. Just depends on the location where I purchase the wine.

I drank it in college but my tastes have evolved.

It's a classic, known to infamously fool 'experts' in blind tastings. I have heard of people thinking it is much higher quality wine than it actually is in a blind test. It's also I think been an entry level wine into red wines for a lot of people (the Shiraz)

Yellow Tail is yucky

Yellow Tail is a widely available brand that helps introduce people to the world of wine, and should be respected for that. However, their quality of product is fairly low and there are much better options available for only a few extra dollars.

It's Australian garbage wine.

It's mass produced manipulated garbage. I would never buy, drink, or serve yellow tail. I would literally rather drink my own urine.

I loved Yellow Tail for the price point and approachability back when I was first getting into wine, roughly 20 years ago. However, I have since moved on to higher-priced wines.

It is bulk juice that is marketed to people who don't really like wine and has damaged the public's perception of the potential quality of Australian wines.

Highly manipulated, the lowest of the low in wine

Cheap and artificial tasting.

No thoughts

My mom drinks it reminds me of my childhood

I think it's a cheap wine for older people. Branding isn't very trendy

Cheap bad

Nice taste good price

Bad

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Seems like a classic straightforward brand easy to find and drink at a reasonable cost

Not a fan

Q38 - Please select any of the following attributes that you feel reflect the following: Yellow Tail

#	Answer	%	Count
1	Authentic	6.90%	6
2	Unique	10.34%	9
3	Passionate	2.30%	2
4	Consistent	31.03%	27
5	Relevant to me	11.49%	10
6	Innovative	1.15%	1
7	High quality	3.45%	3
8	Daring	1.15%	1
9	Imaginative	2.30%	2
10	Spirited	5.75%	5
16	None of these	24.14%	21
	Total	100%	87

Overall Reasons to Not Consider

#	Answer	%	Count
1	Poor quality	43.59%	17
2	It's not a brand for people like me	20.51%	8
3	Doesn't meet my needs	12.82%	5
4	Loyalty to another brand	7.69%	3

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5	Past experiences	7.69%	3
6	Other	5.13%	2
7	Price	2.56%	1
	Total	100%	39

B. Figures, Charts, Tables

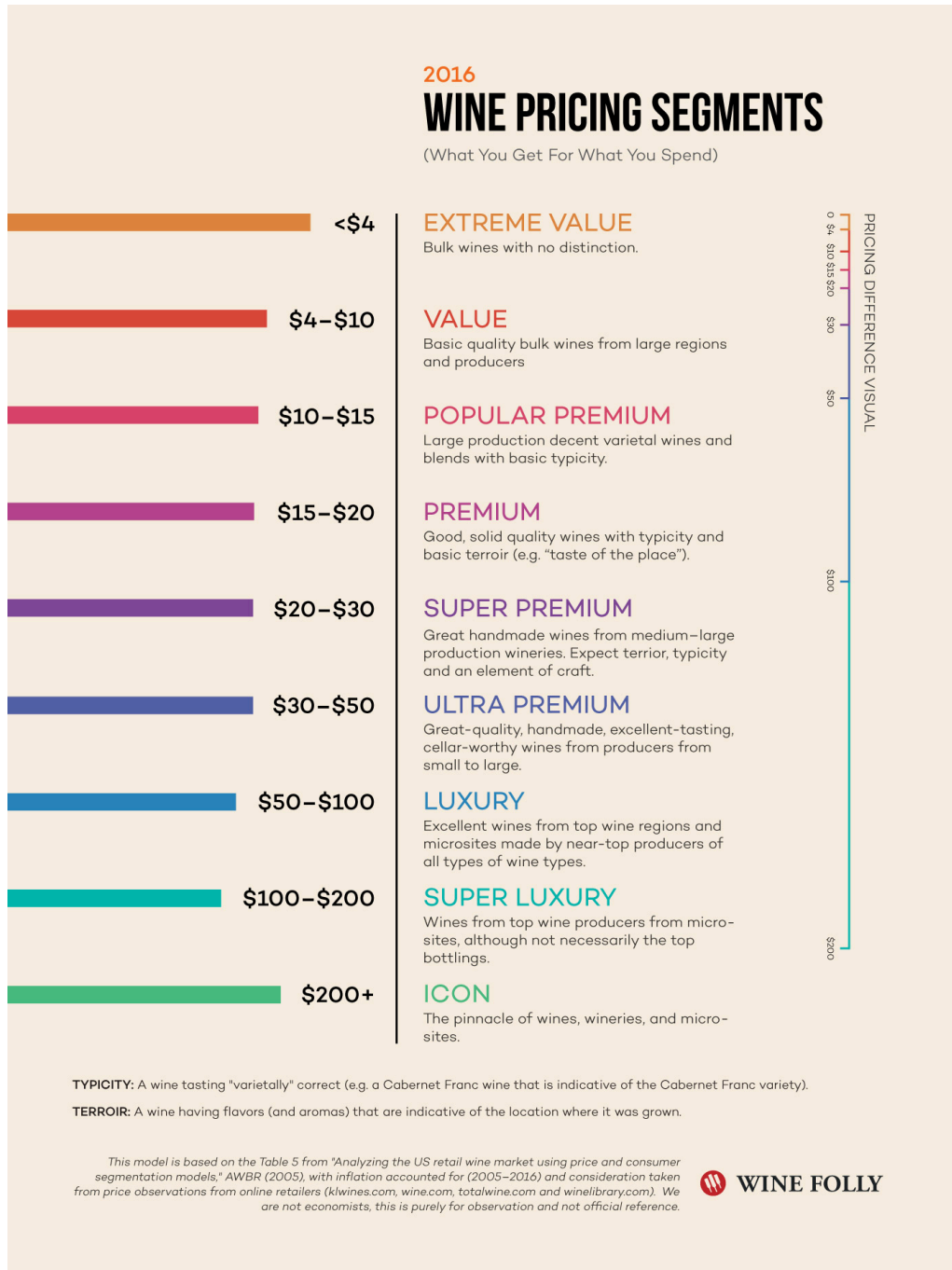
1. ERRC Grid

Eliminate: The complexity of wine selection.	<p>Wines (and wine snobs) are often seen as complicated. Most wines feature vaguely worded flavor notes or a total lack of description on the backs of wine bottles. Wine is also generally perceived as somewhat of a luxury product, and most competitors attempt to make their products more upscale and complex, rather than affordable and easy to understand.</p> <p>In making wine types easier to grasp for the average consumer, Yellow Tail creates a more casual, laid-back brand image that dually raises its accessibility and brand awareness.</p>
Raise: Industry standards for value and budget wine.	<p>On the lower end of the price spectrum, there is a stark difference between premium and budget wines. It is expected that the cheaper the wine, the worse it will taste. Yellow Tail aims to bridge this gap by producing higher quality wine for an exceedingly low price, which raises the industry standard for value and budget wines, as well as challenging high-end competitors to lower their prices.</p>
<p>Reduce: The complexity of wine selection (vague flavor descriptions, emphasis on vineyard prestige).</p> <p>See Appendix C4.</p>	<p>Refer back to the Eliminate factor. The complexity of wine flavors, the different varietals, and the emphasis on vineyard prestige or location overcomplicates wine for the average consumer. Many chose wine haphazardly, at the lowest price, or simply chose an alternative that is simpler to understand (such as beer, hard seltzer, juice or soda).</p> <p>In order to become competitive, Yellow Tail discarded these complexities for simplified flavor descriptors in large lettering on the back label of each bottle. Each label also includes ideal food pairings, which eliminates the need for prior knowledge or research on the consumer's part.</p> <p>Their wines are all produced in Australia, which is quickly gaining ground for its wine culture. This adds to Yellow Tail's fresh, vibrant brand personality.</p>
<p>Create: Ease of drinking, ease of access, sense of vibrancy, uniqueness, and adventure.</p> <p>See Appendix C2 and C3.</p>	<p>Yellow Tail is marketed as an easy default or fallback choice when selecting wines. The variety and ease of pairing due to the back-label description makes Yellow Tail easy to buy, a no-brainer choice for nearly any meal or occasion. The brand's choice of color for the logo and the artistic design of its kangaroo mascot adds to its bright, endearing brand image, and pays homage to the brand's Australian heritage. Its advertisements often portray</p>

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	young adults (aged 21-25) drinking happily at a gathering, in a restaurant, or outdoors, typically at a beach. This invokes a sense of adventure and spontaneity.
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2. Wine Pricing Segments, as per Wine Folly





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2. Yellow Tail UK Instagram Page




yellowtailuk


Follow Message + ...

504 posts 4,433 followers 462 following


[yellow tail] UK
Wine/spirits
Welcome to the official Instagram of [yellow tail] UK. You must be 18+ to follow, share any of our content and use our hashtags. Enjoy responsibly.
www.findyouryellowtail.com/malbecmoments




Jammy Rosé ...




Jammy Red R...



Shiraz




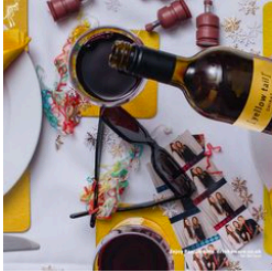




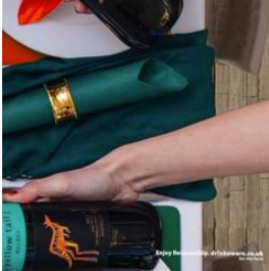


Malbec



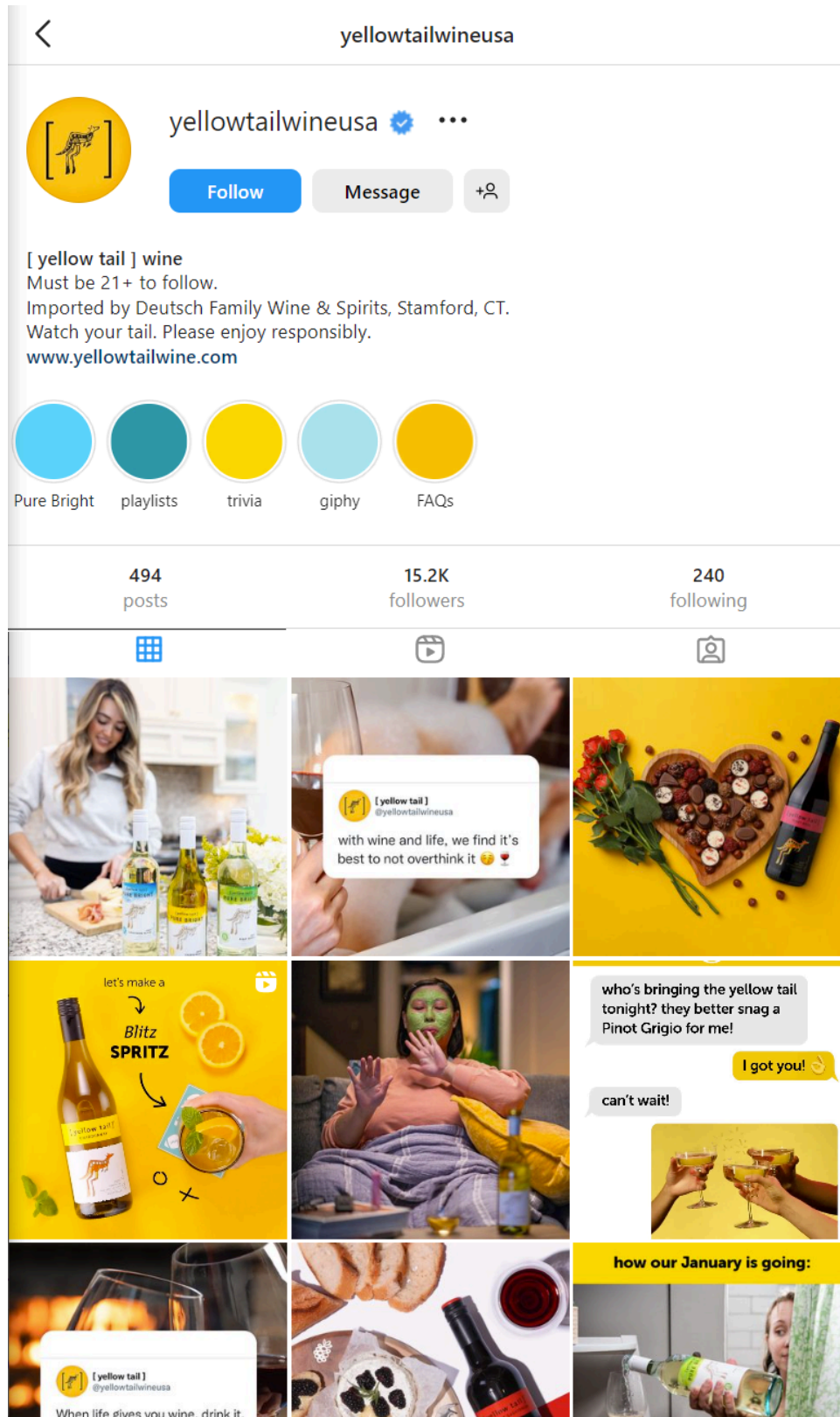
Pinot Grigio

POSTS REELS TAGGED



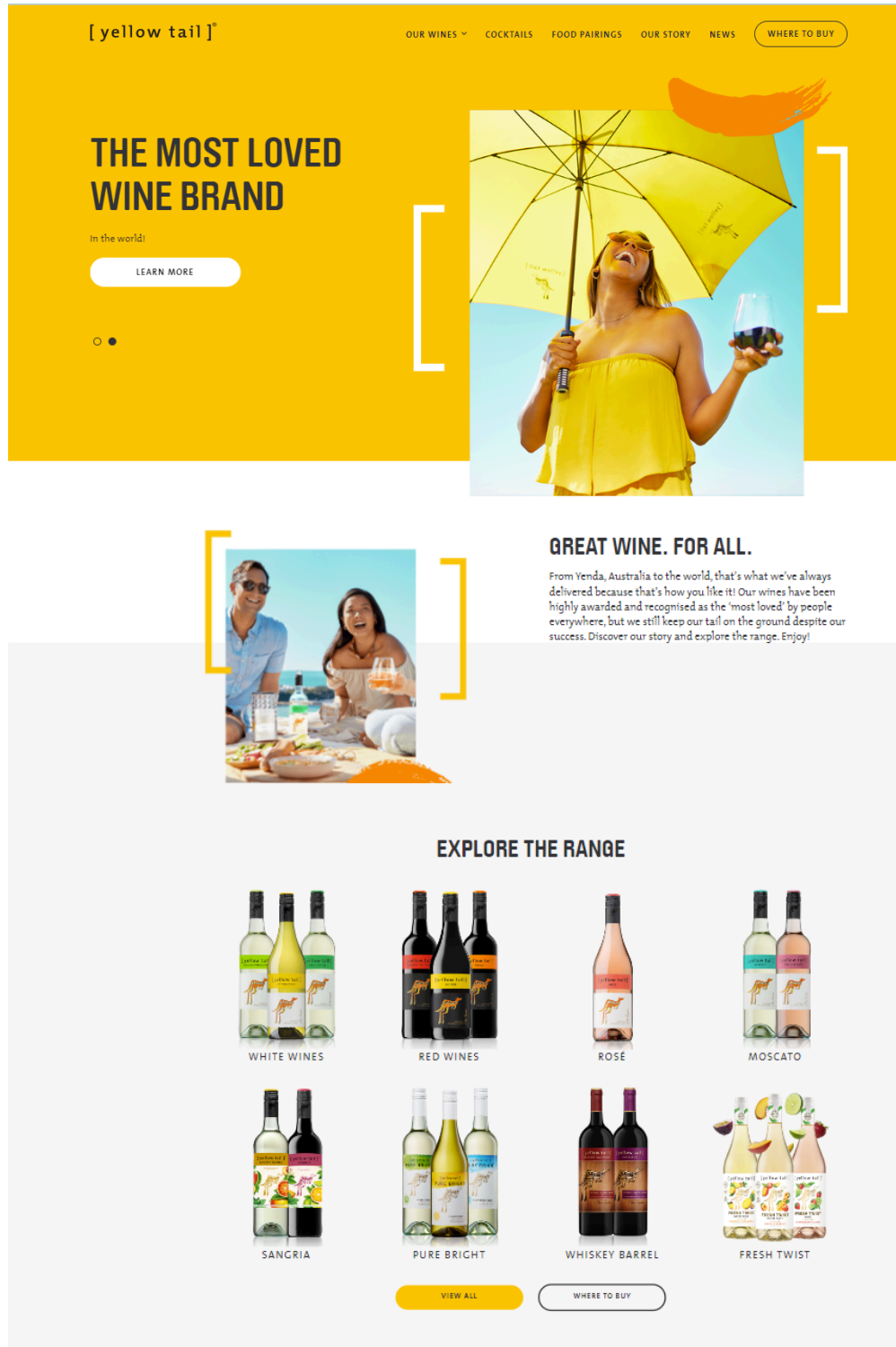
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3. Yellow Tail US Instagram Page



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4. Yellow Tail Website



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5. Yellow Tail back labels



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