
Wine Consumption and Gender:

Do women and men approach wine differently?

October **2018** Multimarket report



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Wine Consumption and Gender

Introduction



Do men and women engage with wine differently? Perhaps this is a dangerous question in the era of heightened gender politics. However, it is also a sensible research question to ask, and the validity of the various theories doing the rounds might have profound commercial implications for those selling wine to the world's 2 billion or so wine consumers, who divide roughly equally into the two genders.

Plenty has been written about the supposed differences between men and women in terms of how they think, act and interact with one another. There is also a lot of generalisation about how they buy, based on observation (and occasionally unsubstantiated prejudice). As researchers in the wine category, we often find that factors other than gender provide better explanations for variance in behaviour. These could include: how old you are, where you live, whether or not you have children living at home, how much you know about wine, whether you grew up in a wine drinking household, how much disposable income you have, and most likely a combination of these and many other factors.

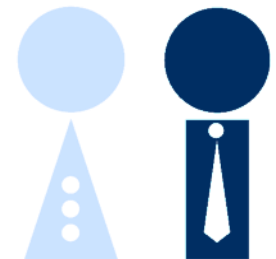
Yet, the gender-and-wine question remains, and with it a number of fascinating and mostly anecdotal theories about gender-related wine behaviour. In this report, we have taken some of the most commonly-heard hypotheses, and used our extensive international consumer behaviour and attitudinal datasets, plus some specifically-designed research experiments, to see if there is any evidence to support or refute them.

We would not presume to think that we have the last word on this – so rather than demolishing or “proving” any of these theories, we note simply what the evidence tells us so far.



Lulie Halstead
Chief Executive
Wine Intelligence

For reference, the gender icons we use in this report are



FEMALE MALE



Women of the Vine & Spirits is thrilled to collaborate with Wine Intelligence on this first ever report focused on gender and wine consumption across six key wine markets.

In an era where the role of gender is very much front of mind, an independent study that is statistically reliable and valid is essential for our industry and innovation.

Women of the Vine & Spirits gives women globally a platform and a voice to thrive in the alcohol beverage industry. Our mission is for our members to connect through our global network to build their business and career, collaborate across all industry sectors to accelerate their business and professional development and commit to take action and make a positive impact in the alcohol beverage industry.

To learn more about Women of the Vine & Spirits, and our Strategic Alliance with Wine Intelligence, visit www.womenofthevine.com

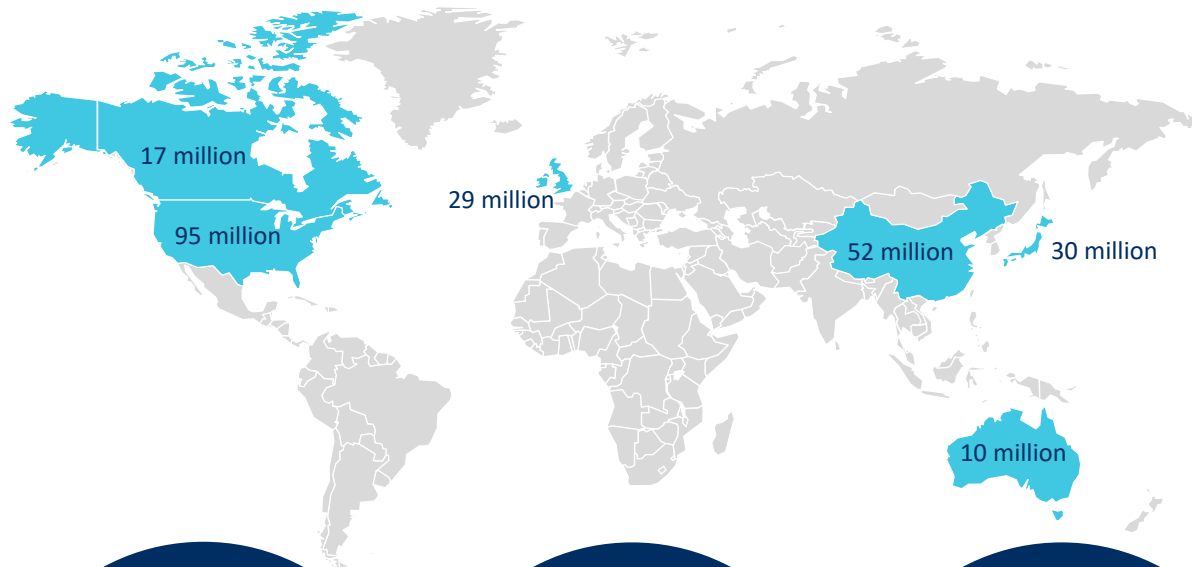
For Corporate Membership Inquiries, please contact Women of the Vine & Spirits at info@womenofthevine.com.

Wine and gender: Report scope

Investigating the gender difference in wine buying and consumption behaviour across 6 key wine markets



Australia
Canada
China
Japan
UK
US



Representative of **232 million** wine drinkers¹

Feedback from **7,000** wine drinkers in 6 markets²

The sample is representative of **wine drinkers** in each market

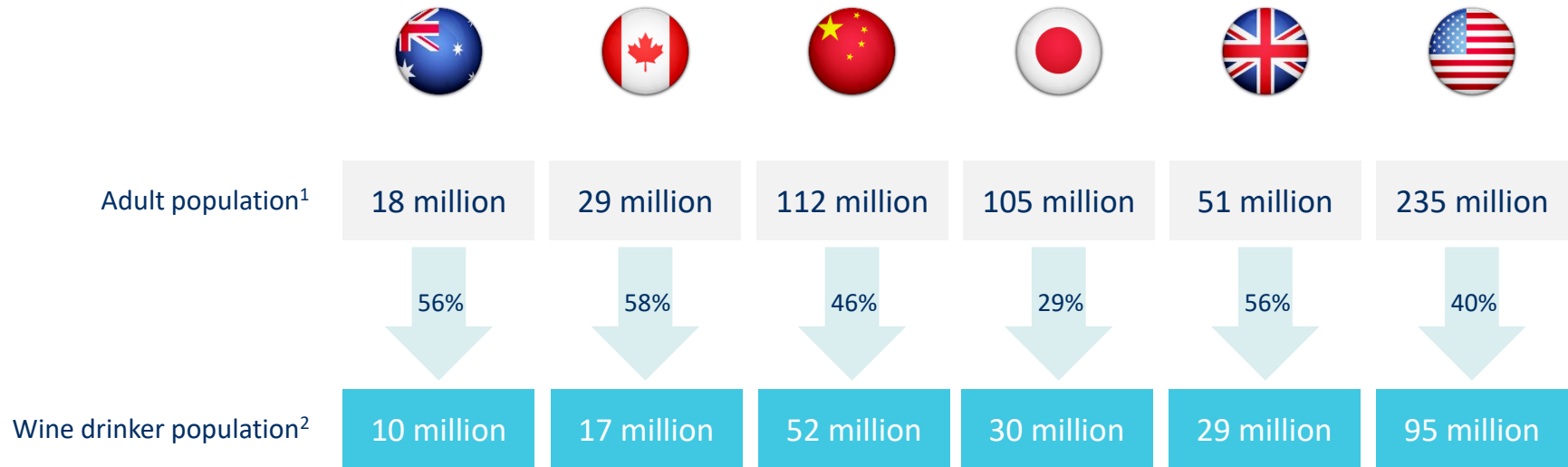
Source:

¹ Wine Intelligence calibration studies in Australia, Canada, China, Japan, UK, US

² Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Overview of market size

The six markets included in the report represent over 230 million wine drinkers



China

Adult population: urban upper-middle class adults aged 18-54
Wine drinker population: urban upper-middle class adults aged 18-54 who drink imported wine at least twice a year

All other markets except China

Adult population: adults above legal drinking age
Wine drinker population: adults above legal drinking age who drink still red, white or rosé wine at least once a month

Source:

¹ National statistics bureau in each market

² Wine Intelligence calibration studies in Australia, Canada, China, Japan, UK, US

Market classification 2018-19



The six markets included in the report range from emerging to mature markets for wine, based on the Wine Intelligence wine market attractiveness Compass model

MATURE	ESTABLISHED	GROWTH	EMERGING	NEW EMERGING
<p>Markets where wine appears to have reached its potential with stable or declining volumes</p>	<p>Markets with strong historical growth which is tailing off</p>	<p>Markets where wine is a mainstream product and / or experiencing growth</p>	<p>Markets where wine is experiencing growth and shows potential from a relatively low base</p>	<p>Markets where wine is still a relatively new and unknown beverage, but showing potential</p>
<p>Germany (2) France (5) Switzerland (6) United Kingdom (7) Sweden (13) Denmark (15) Austria (16) Spain (21) Belgium & Luxembourg (20) Norway (30) Chile (31) Argentina (33) Slovakia (37)</p>	<p>Australia (8) Netherlands (9) Ireland (12) Japan (11) Hong Kong (18) Czech Republic (25) New Zealand (27) Hungary (32) Finland (34) Greece (39) Slovenia (40)</p>	<p>United States (1) Canada (3) Italy (10) Poland (14) South Korea (17) Portugal (19) Romania (22) Singapore (24) Mexico (28) United Arab Emirates (35) South Africa (36)</p>	<p>China (4) Russia (23) Brazil (26) Taiwan (29) Colombia (38) Turkey (41) Peru (46) Angola (49)</p>	<p>Philippines (42) Malaysia (43) Indonesia (44) India (45) Vietnam (47) Thailand (48) Nigeria (50)</p>

() Rank by attractiveness

Source: Wine Intelligence global wine market attractiveness model 2018-19

Wine consumption and gender



This report will test the following commonly-discussed hypotheses about wine and gender, and determine whether or not the evidence supports them

1. Do women drink more wine than men?
2. Do men spend more money on wine than women, with luxury wine more a male domain?
3. Is wine more integrated into the everyday lives of women compared with men?
4. Are men more knowledgeable about and confident with wine compared with women?
5. Do men rely more on external validation of their wine choices compared with women?
6. Is red wine for men and white / rosé wine for women?
7. Is sparkling wine mainly a woman's drink?
8. Are women more likely to buy sustainable and ethical wines compared with men?
9. Do men and women like different kinds of label designs?
10. Do women favour female-led, -owned or -made wines when given the choice?
11. Are women more conscious of moderating their alcohol consumption compared with men?

1 Do women drink more wine than men?

Evidence says: No

- **Almost equal gender split** between men and women in terms of the proportion of regular wine drinkers across markets
 - **China:** Taking into account the development of the wine market, which was previously a male dominated market, it has shifted significantly to include more female drinkers, who now make up 47% of wine drinkers in China
- Men consume proportionally a bit more wine than women because men drink wine more frequently on average

1

Gender of wine drinkers

Equal number of male and female wine drinkers across key markets



Total adult population (LDA+) in 6 key wine markets¹

Adult population (LDA+) in Australia, Canada, Japan, UK and US; urban upper-middle class adults aged 18-54 in China



49%

270 million men



51%

281 million women

Total wine drinking population in 6 key wine markets²

Regular wine drinkers in Australia, Canada, Japan, UK and US; urban upper-middle class imported wine drinkers in China



50%

116 million male wine drinkers



50%

116 million female wine drinkers

Source:

¹ National statistics bureau in each market

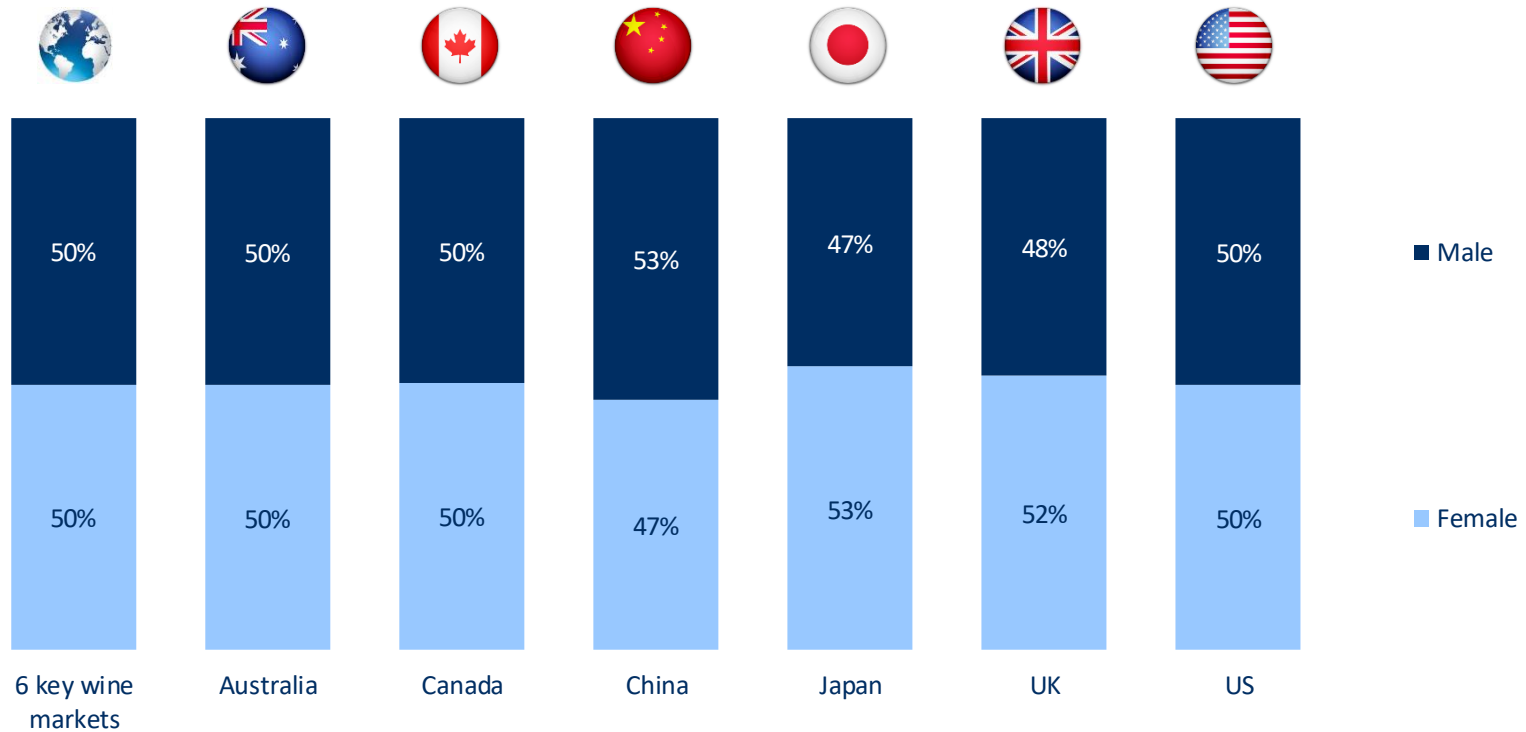
² Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Gender profile of wine drinkers by market

China has the highest proportion of male wine drinkers, although there is a growing proportion of women entering the Chinese market

Gender profile of wine drinkers by market (2018)

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

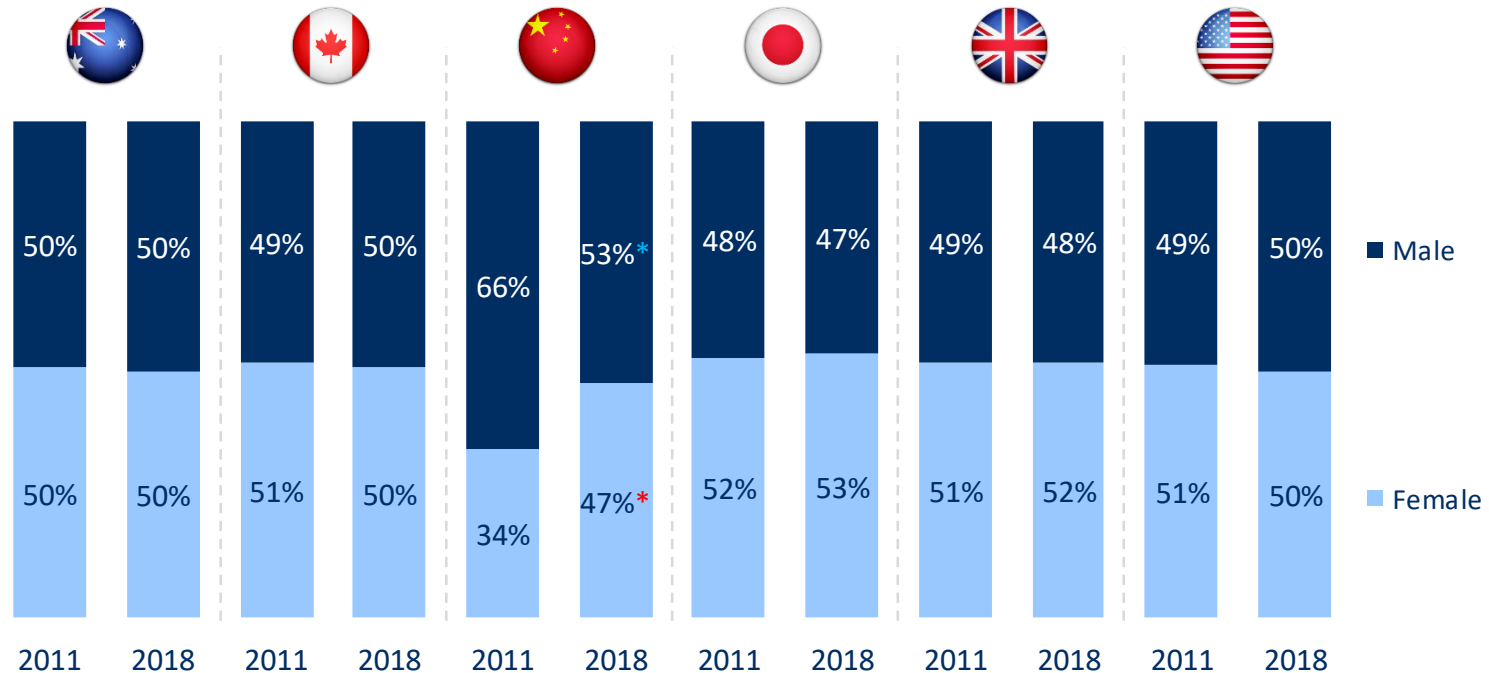


Gender profile of wine drinkers over time

The proportion of women drinking wine in China has increased significantly since 2011, whilst other markets have had equal gender split over the same period

Gender profile of wine drinkers over time

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



/: statistically significantly higher/lower than the previous wave at a 95% confidence level

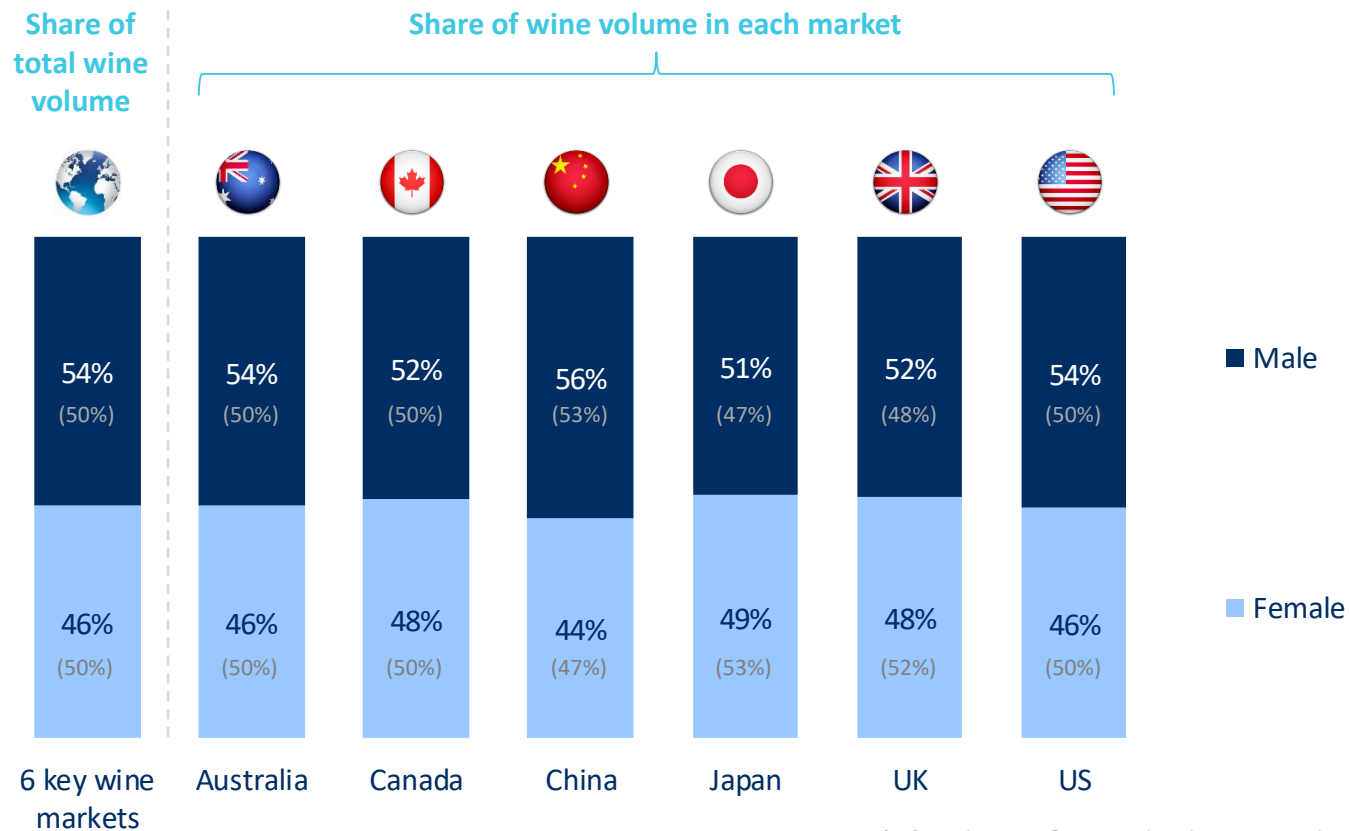
Source: Wine Intelligence, Vinitrac® Global, 2011 - 2018, n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Share of wine volume consumed

Men consume proportionally more wine than women, driven by them drinking wine more frequently on average than women

Share of wine volume consumed by men and women

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Do men spend more money on wine than women, with luxury wine more a male domain?

Evidence says: Yes

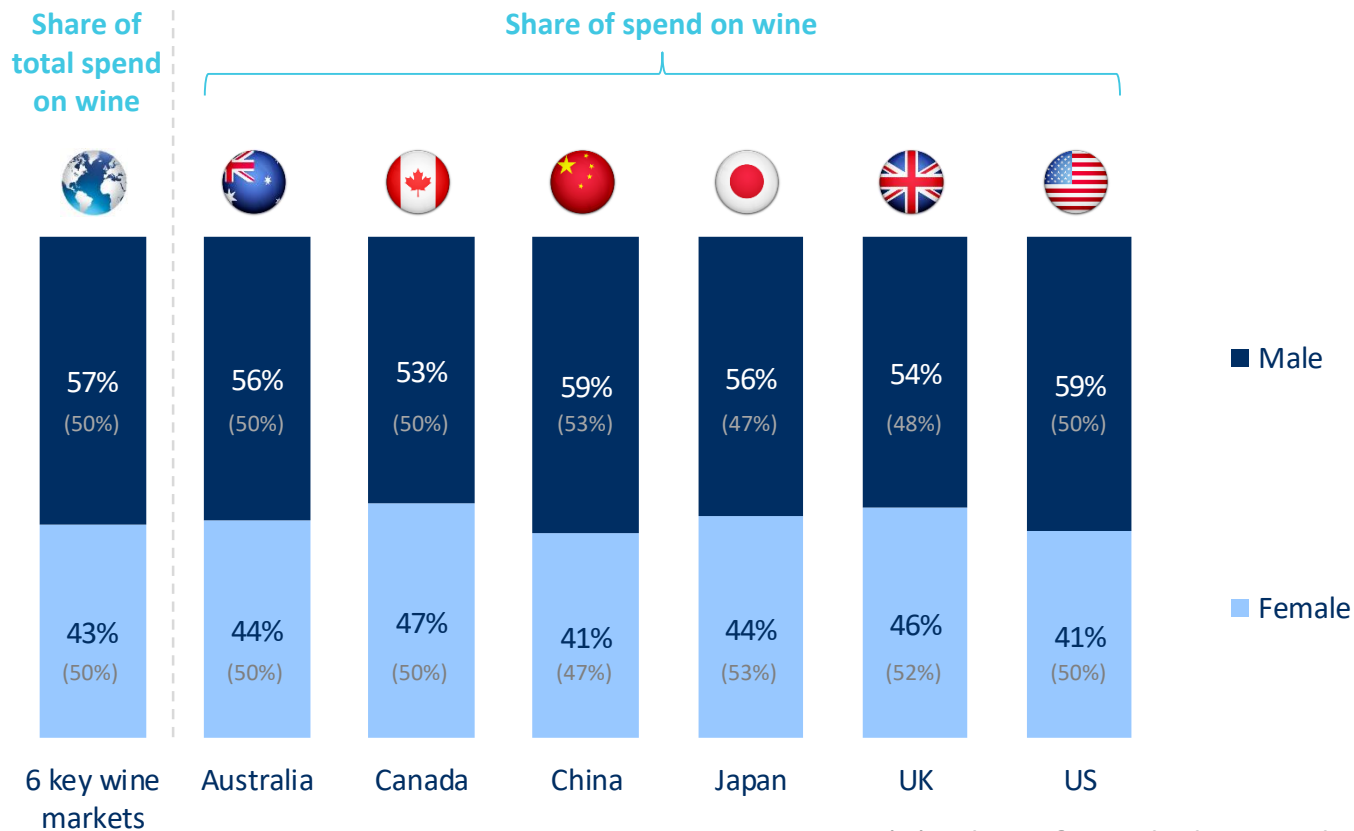
- **Men spend proportionally more** than women on wine, derived from a combination of more frequent wine drinking and a higher average per bottle spend
 - At market level, this difference is particularly significant in Australia, China and US

Share of spend on wine

Men spend proportionally more than women on wine, derived from a combination of more frequent wine drinking and a higher average per bottle spend

Share of spend on wine by men and women

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Typical spend in the off-premise

Women are significantly more likely to spend less (under \$10) on wine in Australia



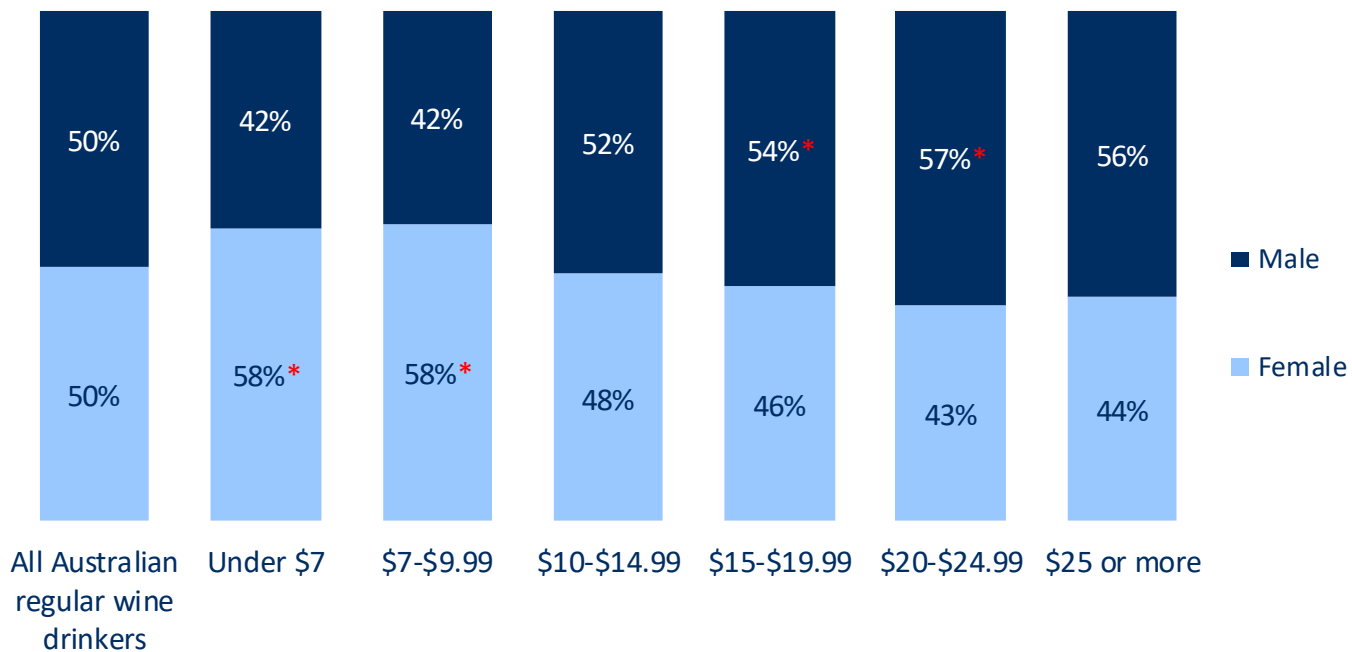
Typical spend in the off-premise in Australia

Base: All Australian regular wine drinkers



Proportion of wine drinking population

Proportion of men / women who typically spend on wine at each price point in the off-premise



* statistically significantly higher than all Australian regular wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Typical spend in the off-premise

Men are significantly more likely to spend more (\$16+) on a bottle of wine in Canada



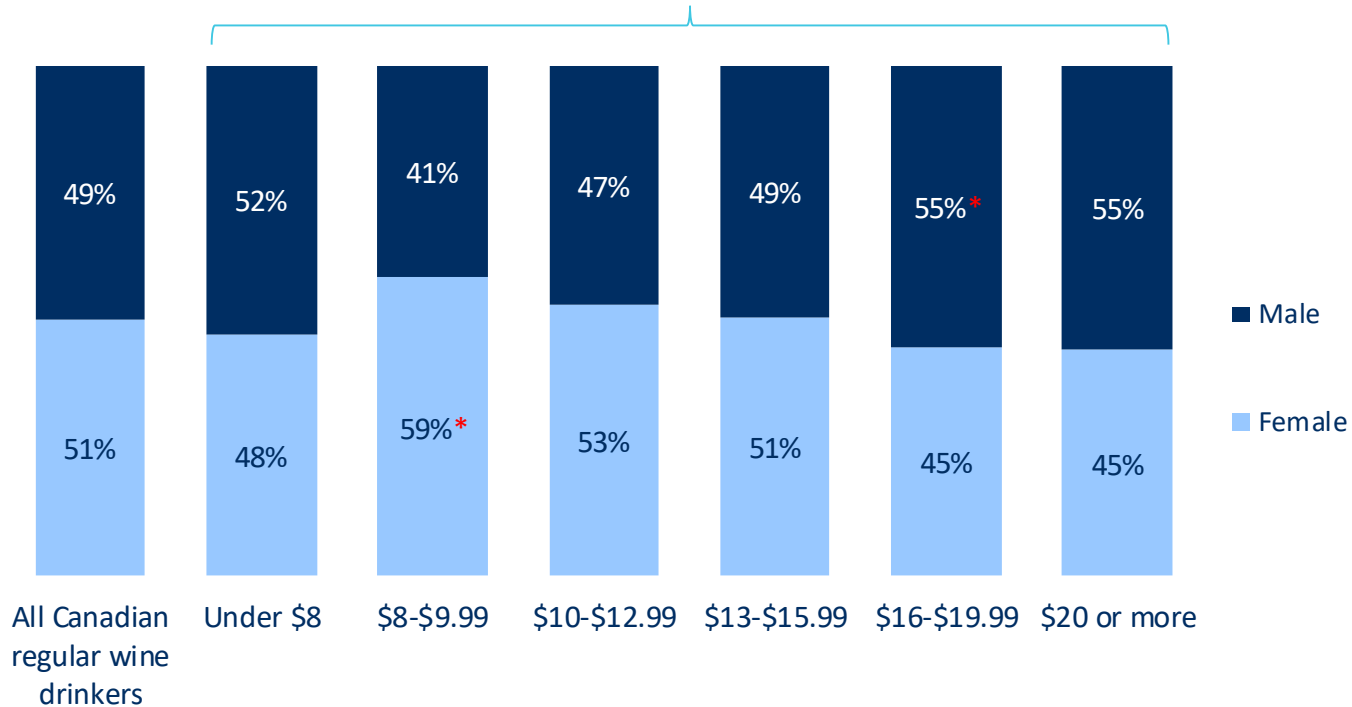
Typical spend in the off-premise in Canada

Base: All Canadian regular wine drinkers



Proportion of wine drinking population

Proportion of men / women who typically spend on wine at each price point in the off-premise



* statistically significantly higher than all Canadian regular wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Typical spend in the off-premise

In China, men are significantly more likely to be buyers of both the lowest priced wine (under 100 RMB) and also purchase at the highest price points (over 500 RMB)

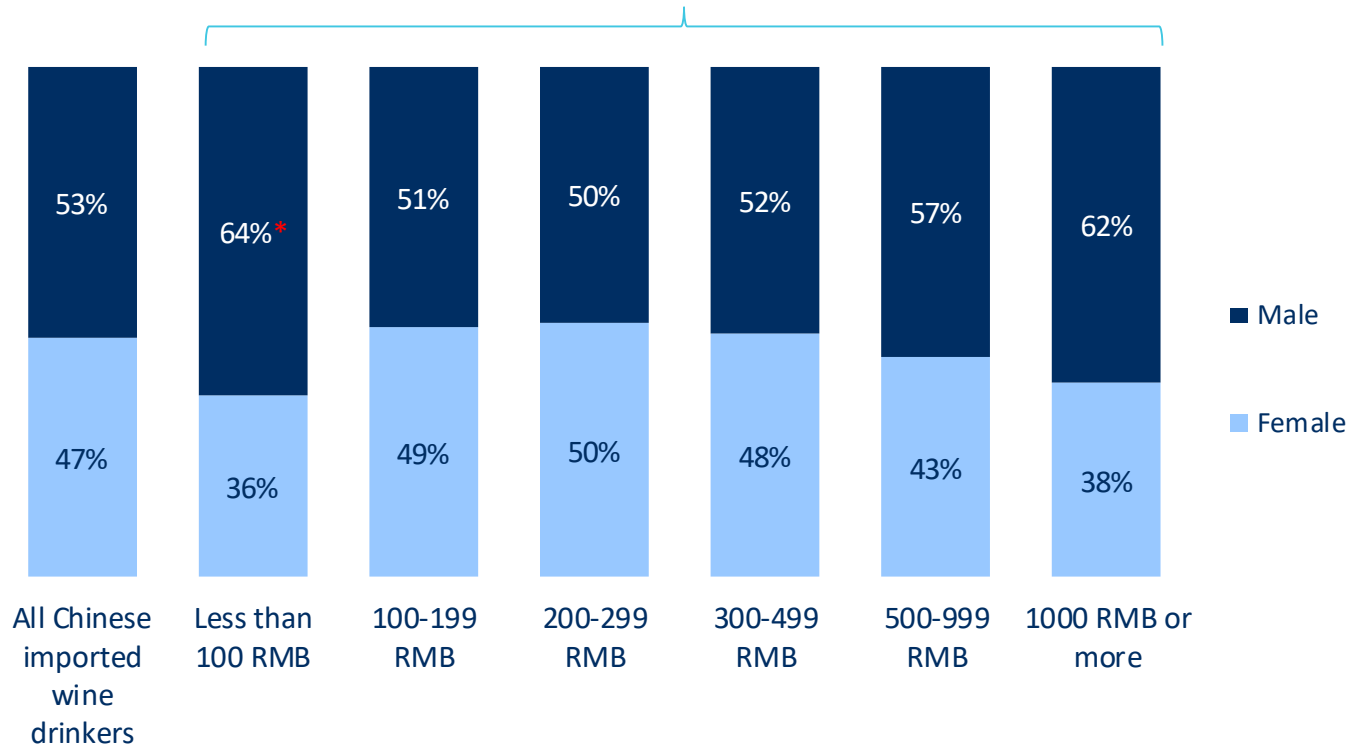
Typical spend in the off-premise in China

Base: All Chinese urban upper-middle class imported wine drinkers



Proportion of wine drinking population

Proportion of men / women who typically spend on wine at each price point in the off-premise



* statistically significantly higher than all Chinese urban upper-middle class imported wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Typical spend in the off-premise

In Japan, men and women have near identical spending patterns for wine

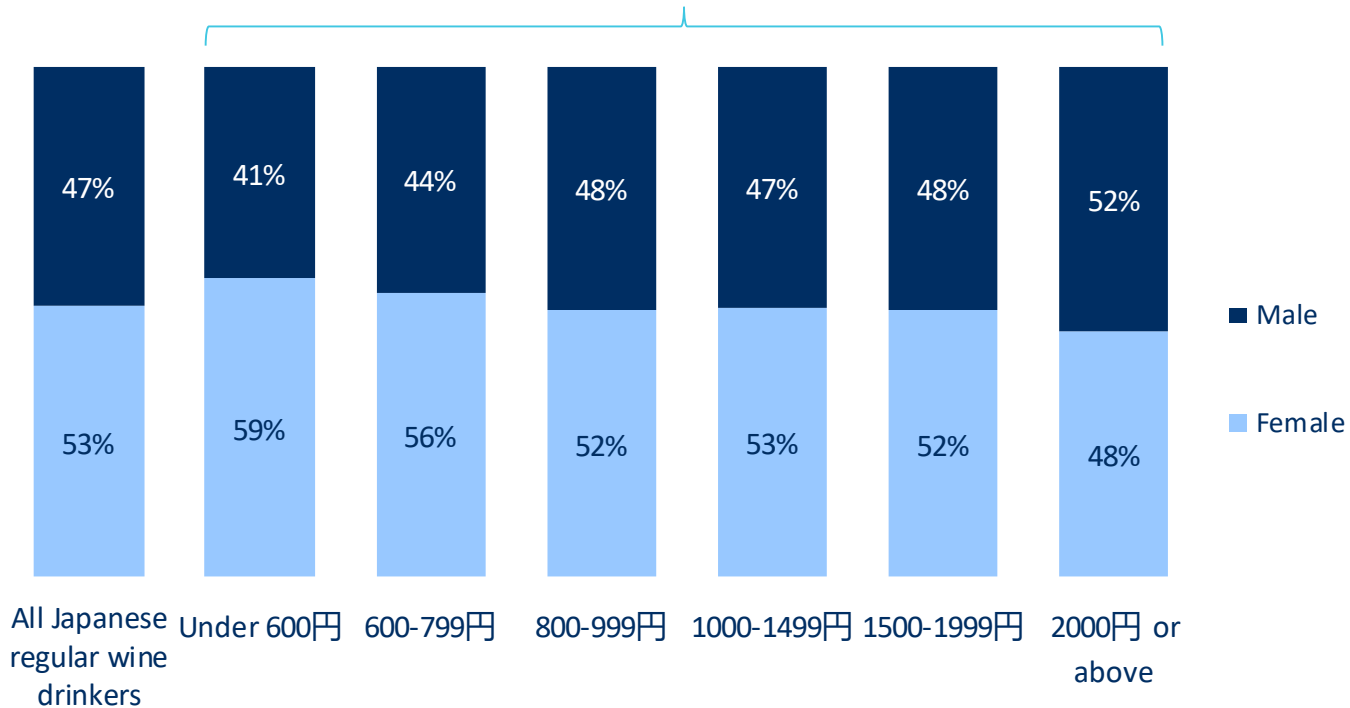
Typical spend in the off-premise in Japan

Base: All Japanese regular wine drinkers



Proportion of wine drinking population

Proportion of men / women who typically spend on wine at each price point in the off-premise



Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Typical spend in the off-premise

A significantly higher proportion of men spend £8+ on a bottle of wine in the UK

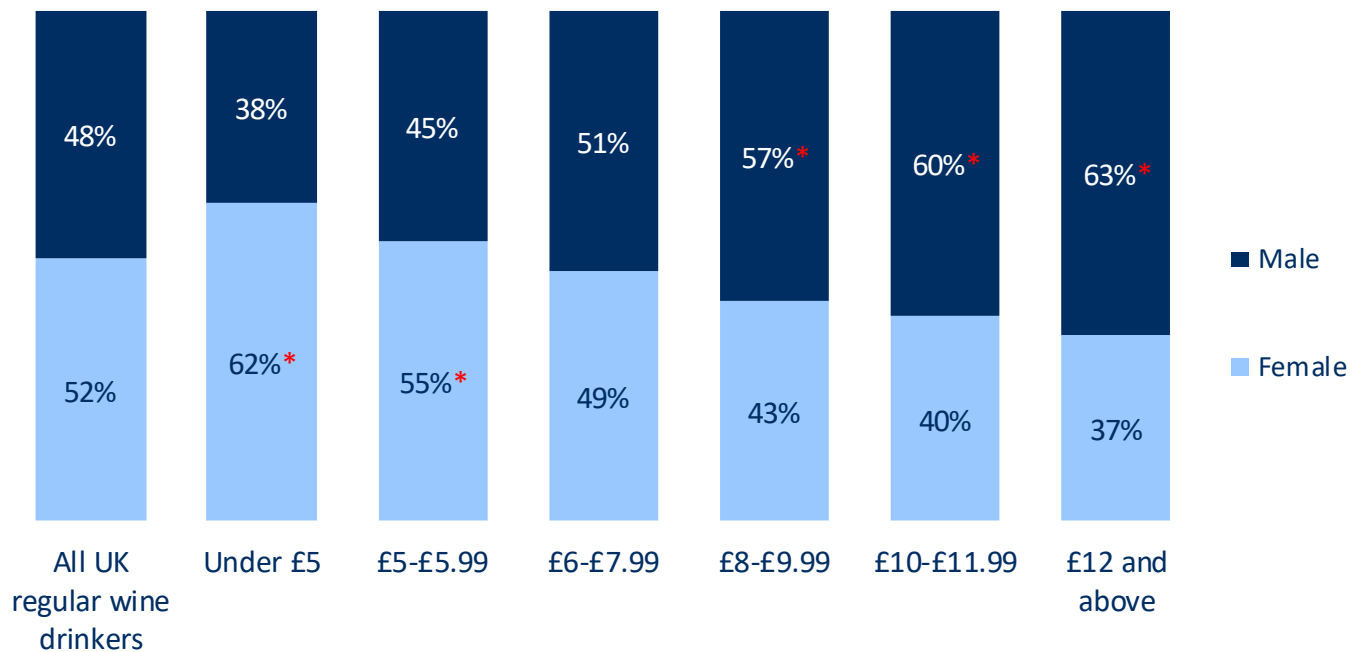
Typical spend in the off-premise in the UK

Base: All UK regular wine drinkers



Proportion of wine drinking population

Proportion of men / women who typically spend on wine at each price point in the off-premise



* statistically significantly higher than all UK regular wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Typical spend in the off-premise

Men in the US tend to be more likely purchasers of a bottle of wine over \$20

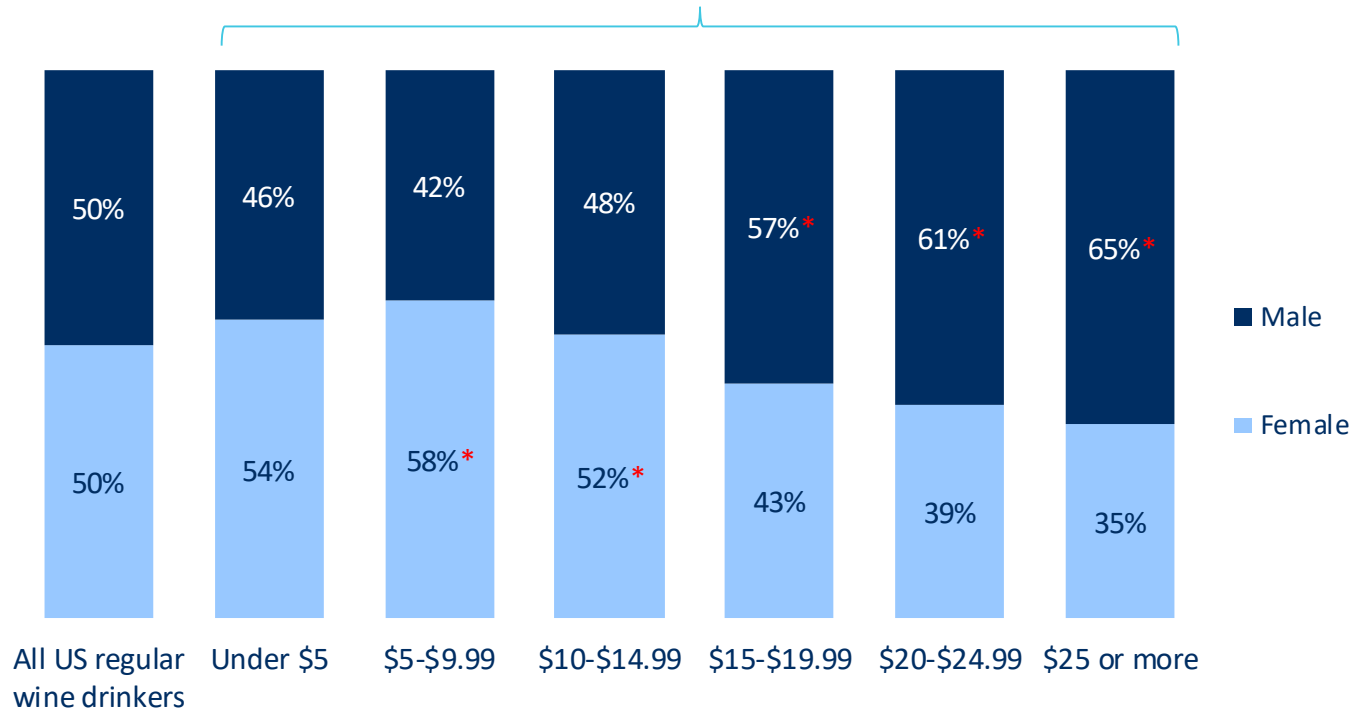
Typical spend in the off-premise in the US

Base: All US regular wine drinkers



Proportion of wine drinking population

Proportion of men / women who typically spend on wine at each price point in the off-premise



* statistically significantly higher than all US regular wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Perceptions of luxury / fine wine

Chinese men associate luxury & fine wine with regionality and reputation of the winemaker, whilst women in China more associate luxury wine with taste cues



Perceptions of luxury / fine wine: China

Ranking based on % who associate or strongly associate the following with luxury/fine wines

Base=Chinese urban upper-middle class imported wine drinkers (n=1,000)



	All Chinese imported wine drinkers		Male		Female	
	%	Rank	%	Rank	%	Rank
Is balanced and harmonious in taste	44%	1	41%	4	47%	1
Made by a well-known wine maker	42%	2	44%	1	40%	6
From a famous wine growing region	42%	2	42%	2	41%	3
Expresses the taste characteristics of the region or area it comes from	40%	4	40%	5	41%	3
Tastes complex	40%	4	39%	6	42%	2
From a producer that has been making wine for many years	40%	4	42%	2	38%	8
High ratings from wine critics	39%	7	37%	8	40%	6
Expresses the taste characteristics of the grape or grapes it is made from	38%	8	36%	9	41%	3
Improves with age	37%	9	38%	7	36%	10
Has remained consistent over time and across vintages	37%	9	36%	9	38%	8
Tastes intense and concentrated	33%	11	31%	12	36%	10
Has won awards and medals	32%	12	36%	9	28%	13
Made from grapes that come from a single vineyard or estate	29%	13	29%	13	29%	12
Is produced in small quantities	28%	14	29%	13	27%	14
Is produced sustainably	26%	15	28%	15	24%	15
Is a wine that you want to talk to others about	23%	16	23%	17	24%	15
Has a high price	22%	17	25%	16	18%	17



Perceptions of luxury / fine wine

Men and women in the UK share similar associations with luxury and fine wine – consistency across vintages and expression of the varietal



Perceptions of luxury / fine wine: UK

Ranking based on % who associate or strongly associate the following with luxury/fine wines

Base=All regular wine drinkers in the UK (n=1,000)



	All UK regular wine drinkers		Male		Female	
	%	Rank	%	Rank	%	Rank
Has remained consistent over time and across vintages	41%	1	44%	1	38%	2
Expresses the taste characteristics of the grape or grapes it is made from	40%	2	41%	2	39%	1
Improves with age	38%	3	40%	3	37%	4
From a famous wine growing region	38%	3	40%	3	36%	6
Is balanced and harmonious in taste	38%	3	40%	3	36%	6
From a producer that has been making wine for many years	37%	6	37%	7	38%	2
Made from grapes that come from a single vineyard or estate	36%	7	35%	8	37%	4
Expresses the taste characteristics of the region or area it comes from	36%	7	39%	6	33%	9
High ratings from wine critics	34%	9	31%	13	36%	6
Has won awards and medals	33%	10	34%	9	33%	9
Tastes intense and concentrated	32%	11	33%	10	31%	11
Made by a well-known wine maker	32%	11	33%	10	31%	11
Has a high price	31%	13	31%	13	30%	13
Tastes complex	30%	14	30%	15	30%	13
Is produced in small quantities	30%	14	33%	10	27%	15
Is a wine that you want to talk to others about	26%	16	26%	16	25%	16
Is produced sustainably	22%	17	23%	17	22%	17



Perceptions of luxury / fine wine



Consistent and reliable excellence is the number 1 luxury wine cue amongst men and women, but men more associate fine wine with being from a famous region compared with women

Perceptions of luxury / fine wine: US

Ranking based on % who associate or strongly associate the following with luxury/fine wines

Base=All regular wine drinkers in the US (n=2,000)



	All US regular wine drinkers		Male		Female	
	%	Rank	%	Rank	%	Rank
Has remained consistent over time and across vintages	42%	1	42%	1	42%	1
Is balanced and harmonious in taste	40%	2	40%	3	40%	3
Improves with age	40%	2	38%	7	41%	2
Expresses the taste characteristics of the grape or grapes it is made from	39%	4	40%	3	38%	4
From a famous wine growing region	39%	4	41%	2	36%	7
Has won awards and medals	38%	6	39%	5	38%	4
From a producer that has been making wine for many years	37%	7	38%	7	36%	7
Expresses the taste characteristics of the region or area it comes from	36%	8	35%	10	37%	6
Made by a well-known wine maker	35%	9	39%	5	32%	12
High ratings from wine critics	35%	9	36%	9	33%	10
Made from grapes that come from a single vineyard or estate	34%	11	35%	10	33%	10
Tastes complex	33%	12	33%	12	34%	9
Is a wine that you want to talk to others about	30%	13	29%	15	31%	13
Is produced in small quantities	30%	13	31%	13	29%	14
Tastes intense and concentrated	30%	13	31%	13	28%	15
Has a high price	27%	16	28%	16	26%	16
Is produced sustainably	23%	17	23%	17	24%	17



Is wine more integrated into the everyday lives of women compared with men?

Evidence says: No

- **Men typically drink wine more frequently than women**, particularly at more formal events such as dinners at home
- However, women drink wine more frequently than men in the US for the occasion of a relaxing drink at the end of the day at home
- Similar story holds in the on-premise as well, where men typically drink wine more frequently than women across the range of on-premise occasions
 - On-premise wine drinking is significantly dominated by men across all occasions in the US market








Consumption frequency in the off-premise

Men typically drink wine more frequently than women, particularly at more formal events such as formal dinners and celebrations at home

Average frequency of wine consumption per month by occasion (off-premise)

Average frequency per month for consuming wine for each of the following off-premise occasions

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

								
		6 key wine markets	Australia	Canada	China	Japan	UK	US
While relaxing at home	Male	5.7	7.3	5.7	3.6	4.8	7.2	6.5
	Female	6.0	7.3	5.8	3.4	4.5	6.7	7.5
With an informal meal at home	Male	5.1	6.7	5.9	2.4	5.7	5.8	5.9
	Female	4.8	5.9	5.1	2.1	5.5	5.8	5.5
With a more formal dinner party at home	Male	1.9	2.0	2.2	1.7	1.1	1.7	2.4
	Female	1.4	1.4	1.8	1.5	0.8	1.2	1.6
At a party/celebration at home	Male	1.8	2.1	1.7	1.3	1.0	1.6	2.4
	Female	1.4	1.7	1.4	1.2	0.7	1.2	1.9

Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China








Consumption frequency in the on-premise

Men typically drink wine more frequently than women in the on-premise across a range of occasions, which is particularly true in the US market

Average frequency of wine consumption per month by occasion (on-premise)

Average frequency per month for consuming wine for each of the following on-premise occasions

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

								
		6 key wine markets	Australia	Canada	China	Japan	UK	US
A relaxing drink out at the end of the day	Male	3.3	4.7	2.8	2.0	1.7	3.7	4.4
	Female	2.8	4.0	2.7	1.6	1.0	3.1	3.8
With an informal meal in a pub/bar/restaurant	Male	2.3	1.9	1.7	1.7	1.9	2.5	2.7
	Female	1.7	1.6	1.2	1.5	1.2	1.9	1.7
With a more formal dinner in a restaurant	Male	1.9	1.8	1.5	1.3	1.5	2.1	2.5
	Female	1.3	1.2	1.2	1.2	0.9	1.4	1.4
At a party/celebration/big night out	Male	1.7	1.5	1.0	1.5	0.9	1.5	2.2
	Female	1.3	1.2	1.1	1.3	0.8	1.5	1.4

Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Are men more knowledgeable about and confident with wine compared with women?

Evidence says: inconclusive

- Men and women have very similar levels of wine knowledge across all 6 markets, leading to a **global wine knowledge index that is identical for men and women**
- However, **men are significantly more confident** with wine in all markets with the exception of China, where women and men are equally confident with wine
 - A strong gender bias continues in the on-premise, with a significantly higher proportion of men stating that they are always / mostly the person ordering wine when in a restaurant

- **Wine knowledge index** was calculated based on the number of wine-producing countries, wine-growing regions and wine brands each consumer is aware of. The knowledge index ranges from 0 to 100 (100 = the consumer is aware of all the countries, regions and brands when prompted). Wine knowledge index is the “objective” measurement of consumer knowledge about wine

- **Wine confidence index** is calculated based on each consumer’s answer to three attitudinal statements:
 - 1) *I feel competent about my knowledge of wine*
 - 2) *Compared to others, I know less about the subject of wine*
 - 3) *I don’t understand much about wine*

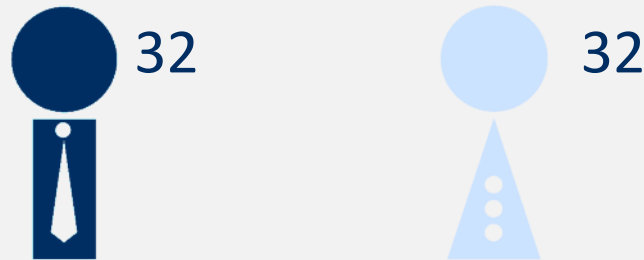
The index ranges from 0 to 100 (100 = the consumer is extremely confident about their knowledge of wine, i.e. strongly agree with the first statement and strongly disagree with the second and third statements). Wine knowledge index is the “subjective” measurement of consumer confidence about wine

Wine confidence & knowledge index

Whilst the level of wine knowledge is equal for men and women, men are significantly more confident with wine than women

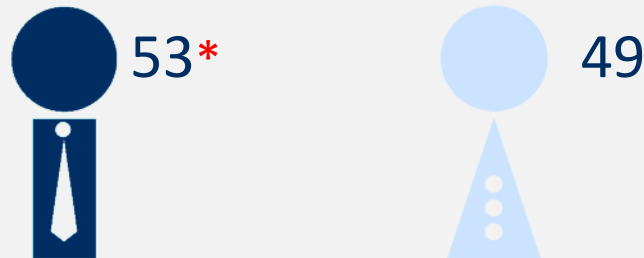
Wine knowledge index: 6 key wine markets combined

Wine knowledge index (0-100) is calculated based on consumer-reported awareness of wine-producing countries, wine-growing regions and wine brands
Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



Wine confidence index: 6 key wine markets combined

Wine confidence index (0-100) is calculated based on the extent to which consumers feel competent about their wine knowledge
Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



* statistically significantly **higher** than the other gender at a 95% confidence level

Wine confidence index uses consumers' answers to three attitudinal statements: "I feel competent about my knowledge of wine", "Compared to others, I know less about the subject of wine", and "I don't understand much about wine"

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

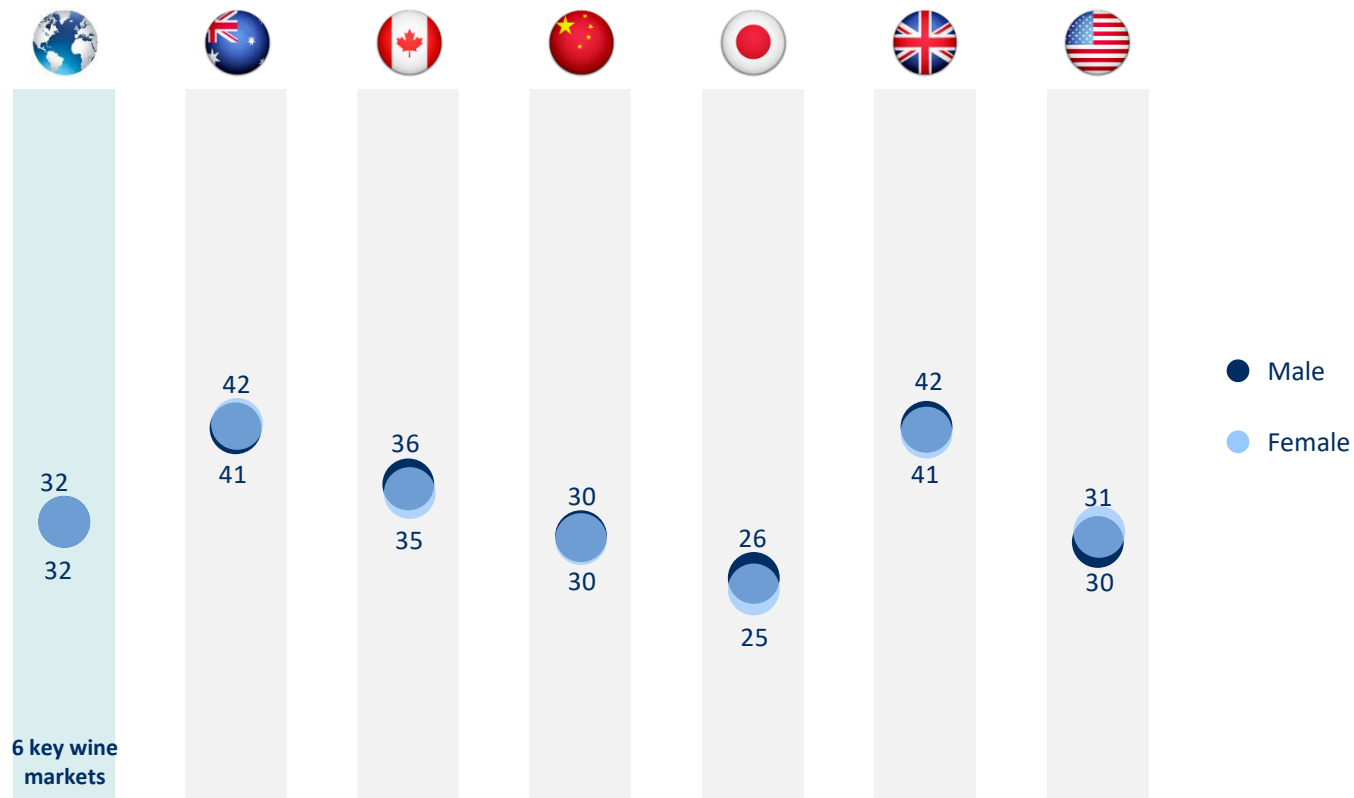
Wine knowledge index



Men and women have very similar levels of wine knowledge in all 6 markets, leading to a global wine knowledge index that is identical for men and women

Wine knowledge index

Wine knowledge index (0-100) is calculated based on consumer-reported awareness of wine-producing countries, wine-growing regions and wine brands
 Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



Wine confidence index

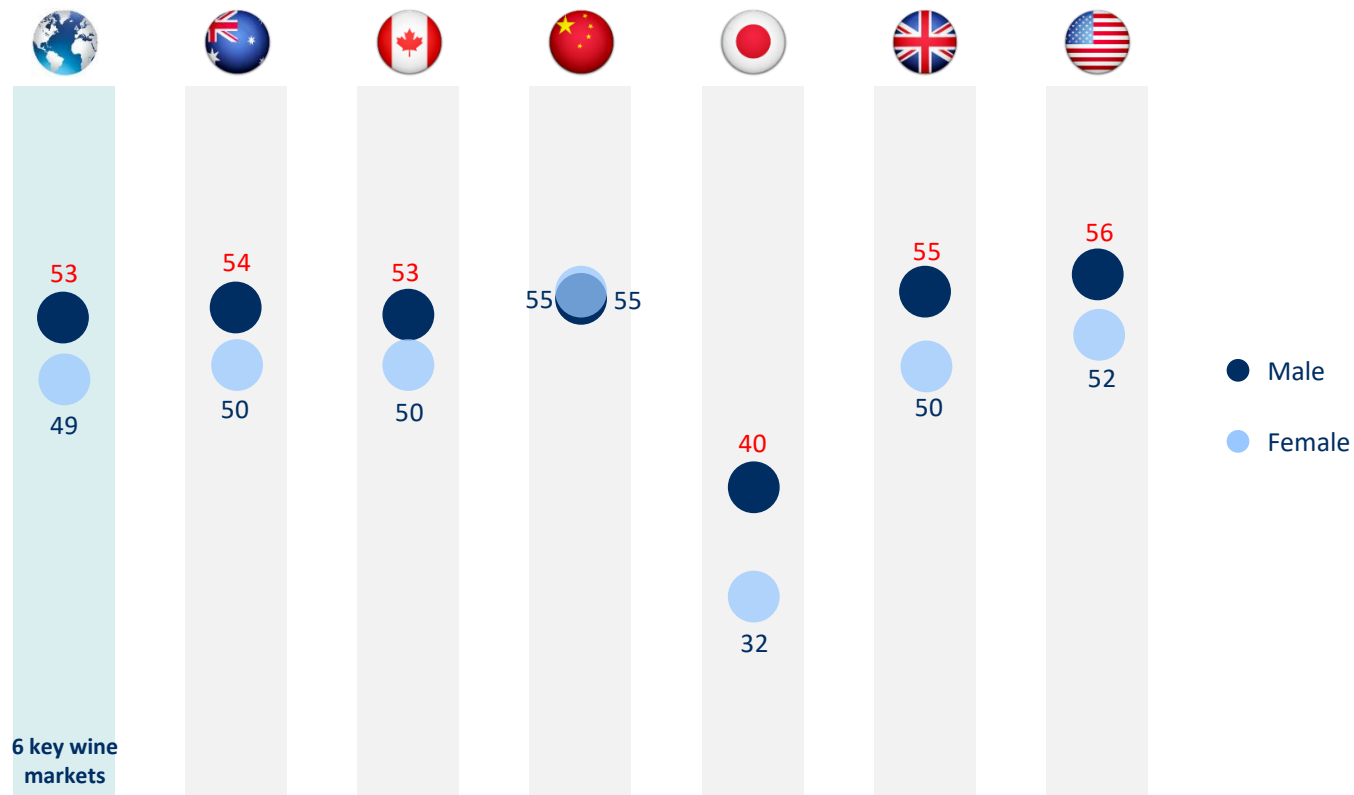
Men are significantly more confident within all markets with the exception of China, where women and men are equally confident with wine



Wine confidence index

Wine confidence index (0-100) is calculated based on the extent to which consumers feel competent about their wine knowledge

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

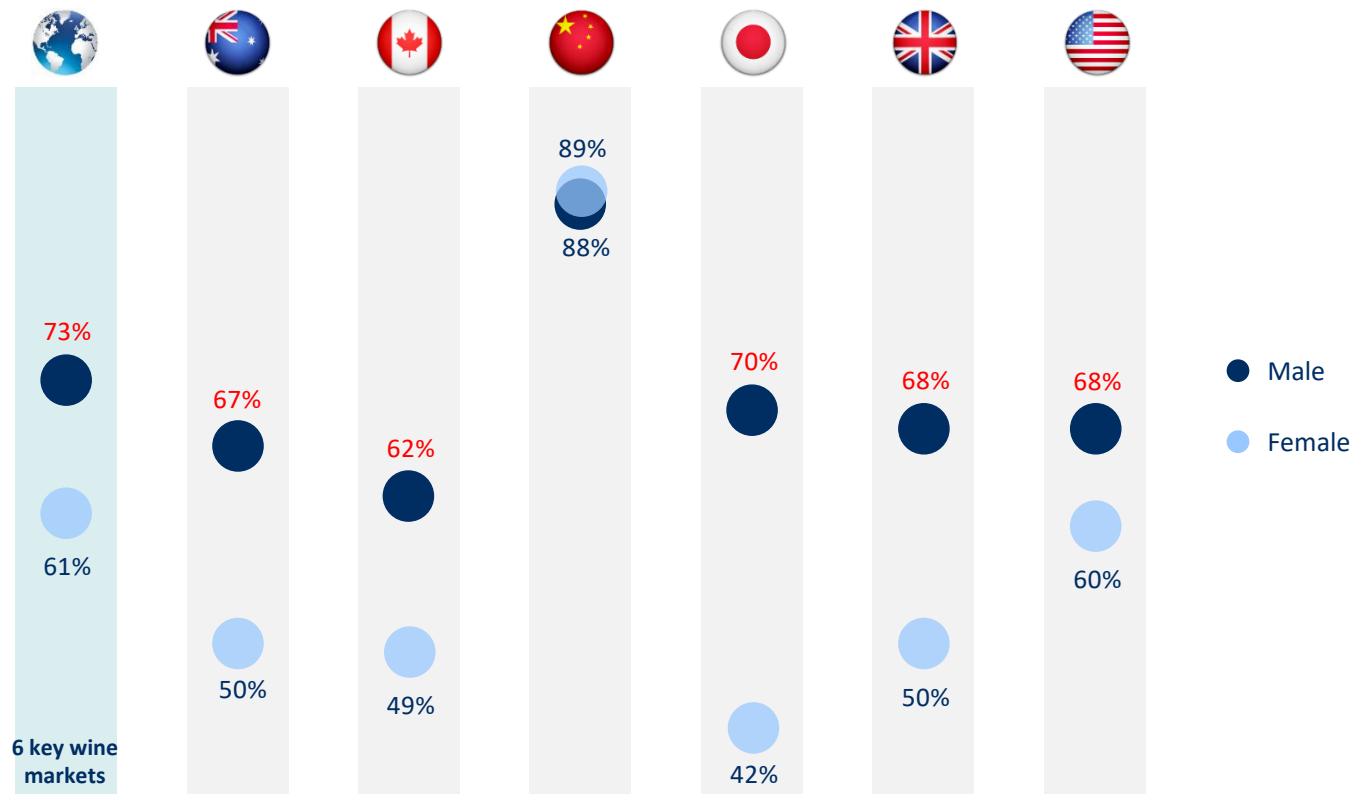
Person ordering wine in a restaurant

A significantly higher proportion of men say they are always / mostly the person ordering wine when in a restaurant

Primary person ordering wine in a restaurant

% who stated "I'm always / mostly the person ordering the wine when eating at a restaurant"

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

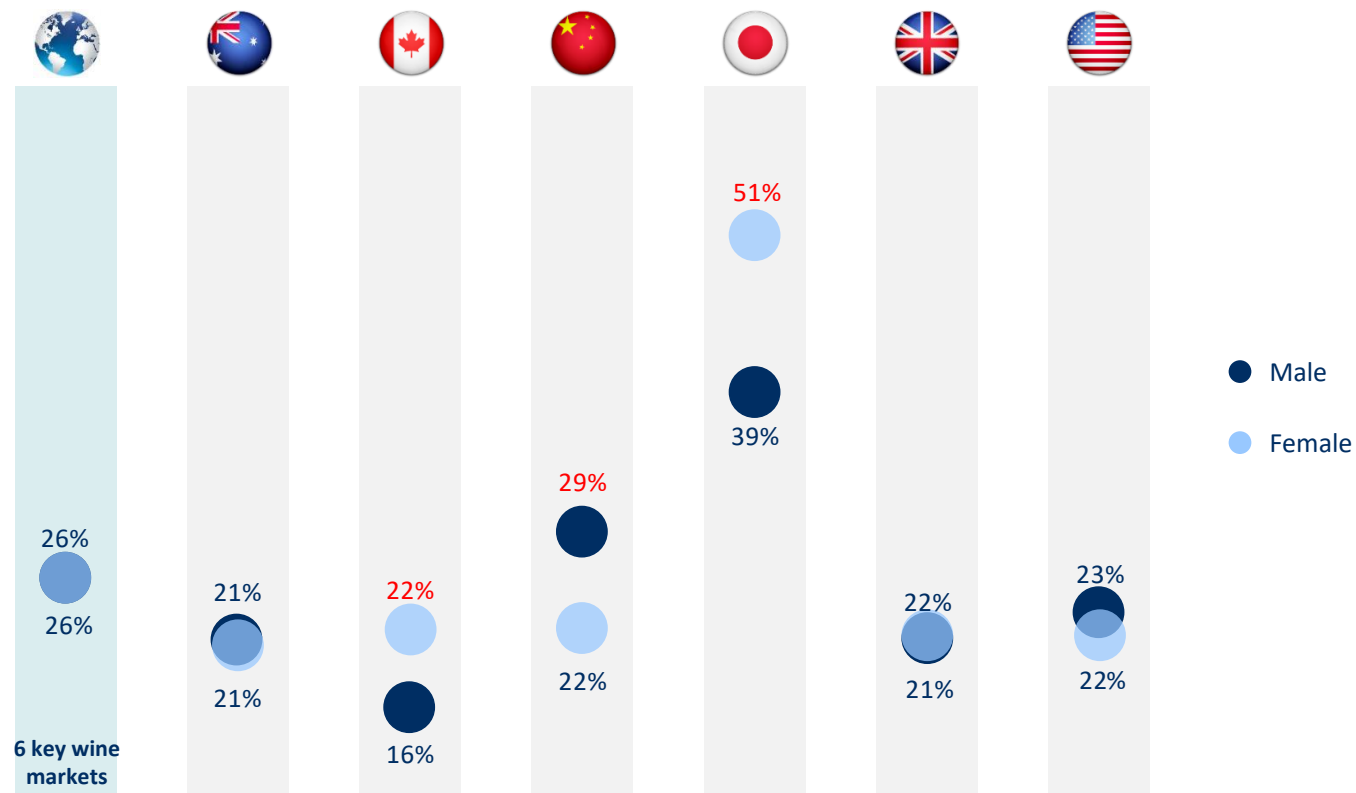
Choosing wine in the on-premise

Globally, equal proportions of men and women feel nervous about choosing wine in a bar or restaurant, although women in Canada and Japan are significantly more nervous than men. In China, roles reverse as men feel the pressure when ordering wine

Nervousness about choosing wine in the on-premise

% who agree or agree strongly with the statement “I am often nervous when I have to choose a wine at a bar or restaurant”

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Do men rely more on external validation of their wine choices compared with women?

Evidence says: Yes

- When selecting wine, more **men are motivated by a wine's provenance, brand and expert validation**
- Meanwhile, a **higher proportion of women are driven by taste, word of mouth and promotional offer**

Wine buying choice cues

When selecting wine, more men are motivated by a wine's provenance, brand and expert validation, whilst a higher proportion of women care about taste, word of mouth and promotional offer

Wine-buying choice cues: 6 key wine markets combined

% who consider the following choice cue important or very important when buying wine

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Most important



Least important

* not tested in China

Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Country / region of origin as a choice cue

A significantly higher proportion of men are influenced by a wine's origin than is the case for women

Country / region of origin as a choice cue

% who consider country / region of origin important or very important when buying wine

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Market	Male	Female
6 key wine markets	71%	62%
Australia	75%	67%
Canada	74%	69%
China	71%	67%
Japan	69%	68%
UK	74%	64%
US	70%	55%

Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

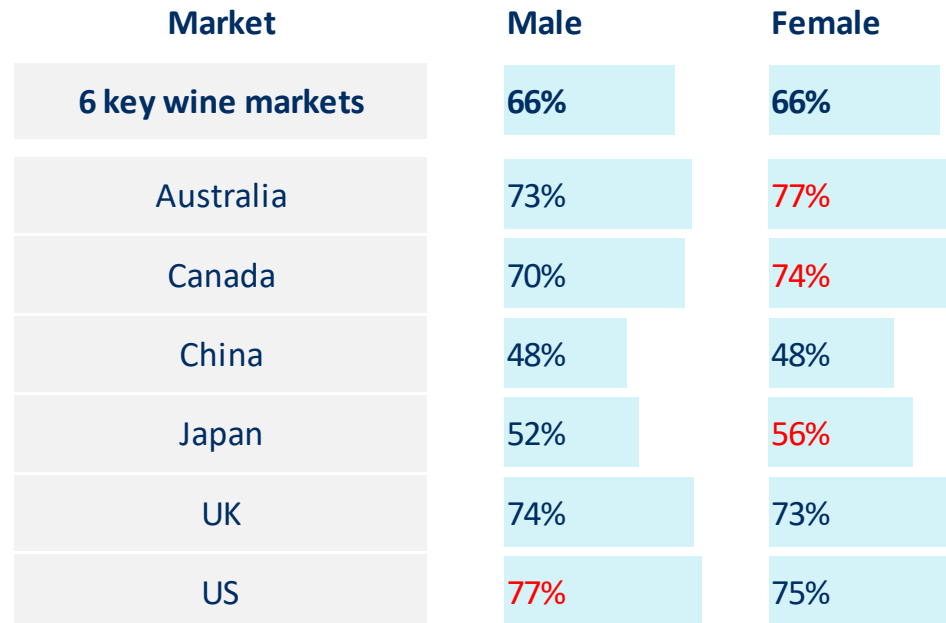
Grape variety as a choice cue

More women in Australia, Canada and Japan consider grape variety important when choosing wine compared to men, while in the US, more men are influenced by varietal than women

Grape variety as a choice cue

% who consider grape variety important or very important when buying wine

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

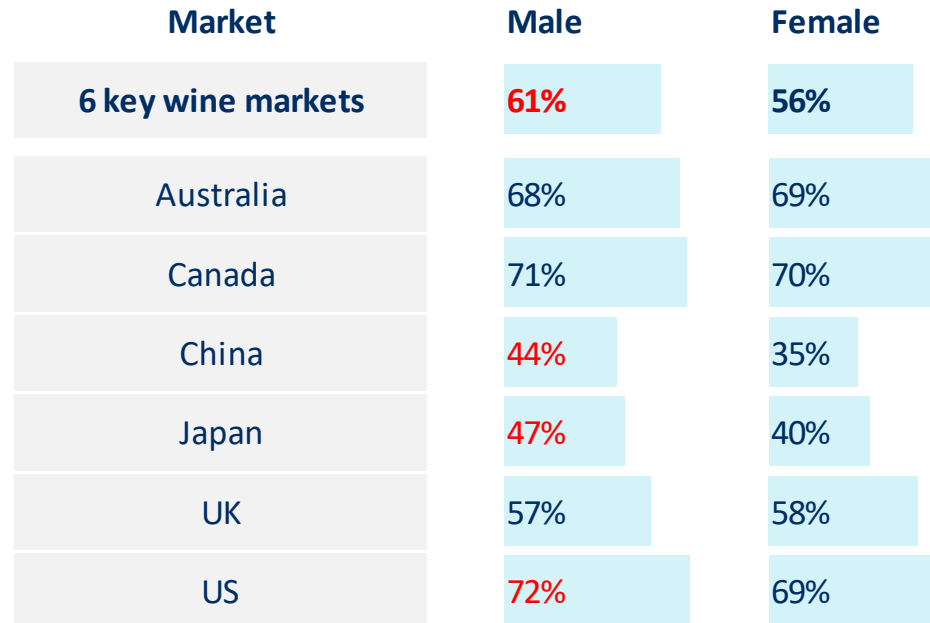
Brand as a choice cue

A significantly higher proportion of men in China, Japan and the US are choosing wine by brand compared to women

Brand as a choice cue

% who consider “a brand I am aware of” important or very important when buying wine

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

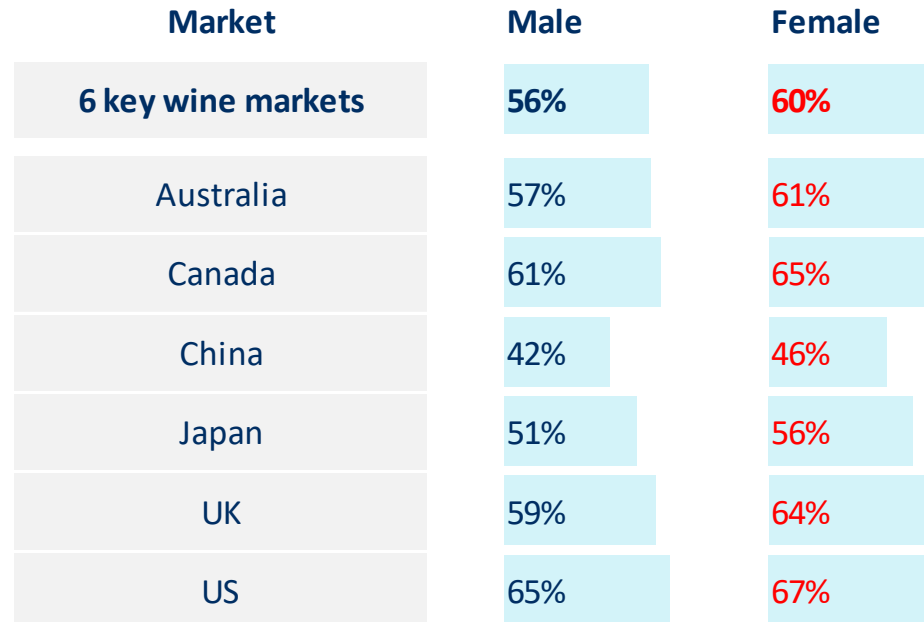
Taste or wine style description as a choice cue

Across all 6 markets, more women consistently consider taste or wine style descriptors to be important in their wine buying decisions than is the case for men

Taste or wine style descriptions as a choice cue

% who consider taste or wine style descriptions important or very important when buying wine

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

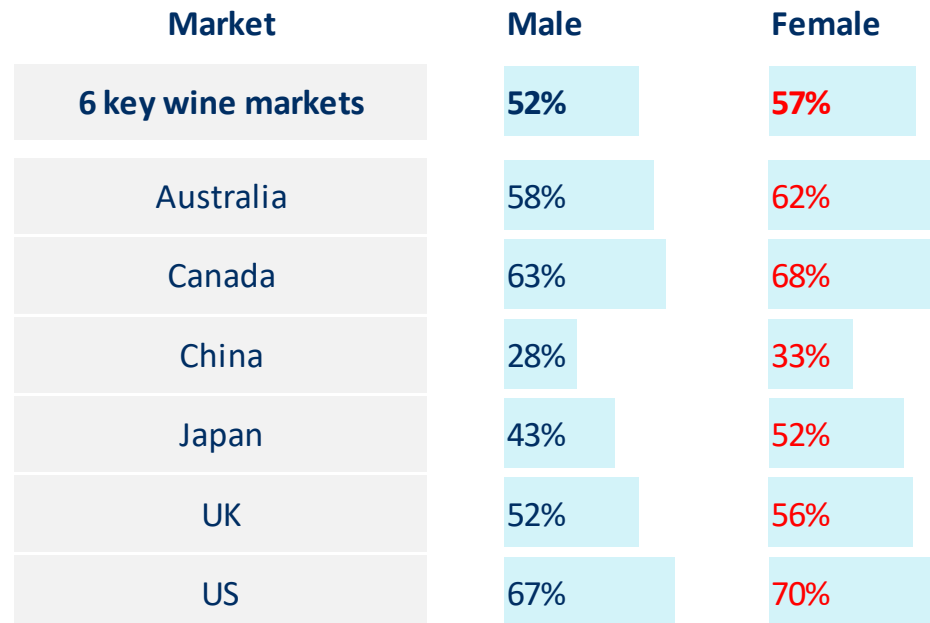
Recommendation by friends or family as a choice cue

Across all 6 markets, more women consistently consider recommendations by friends or family to be important in their wine buying decisions than is the case for men

Recommendation by friends or family as a choice cue

% who consider recommendation by friends or family as a choice cue important or very important when buying wine

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

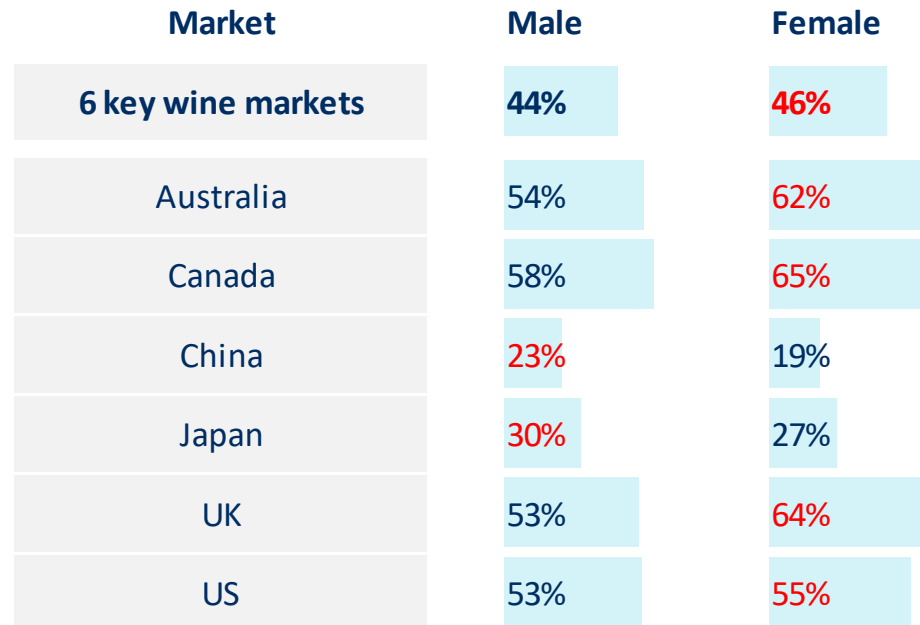
Promotional offer as a choice cue

More women consider promotional offers important when choosing wine compared to men, with the exception of the Asian markets of Japan and China

Promotional offer as a choice cue

% who consider promotional offer important or very important when buying wine

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Recommendation by wine experts as a choice cue

A significantly higher proportion of men in Australia, UK and US are influenced by a recommendation by wine experts than women

Recommendation by wine experts as a choice cue

% who consider recommendation by wine guide books, wine critic or writer important or very important when buying wine

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Market	Male	Female
6 key wine markets	44%	37%
Australia	43%	32%
Canada	45%	44%
China	28%	28%
Japan	40%	37%
UK	38%	29%
US	55%	43%

Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Medal / award as a choice cue

More men consider medals or awards important when choosing wine than women, with the exception of the Asian markets of Japan and China

Medal / award as a choice cue

% who consider whether or not the wine has won a medal or award important or very important when buying wine

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Market	Male	Female
6 key wine markets	36%	30%
Australia	32%	26%
Canada	31%	26%
China	45%	45%
Japan	29%	30%
UK	29%	24%
US	37%	26%

Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Evidence says: inconclusive

- In most markets studied, **men consume a higher proportion of red wine** than women, with the exception of Japan, where men and women consumed an equal volume
- In Canada, UK and US, women consume a slightly larger volume of white wine than men
- For rosé, there is no clear pattern between markets in terms of the volume of consumed:
 - Men consume more rosé in Japan and Australia
 - A higher volume of rosé consumed by women in the UK

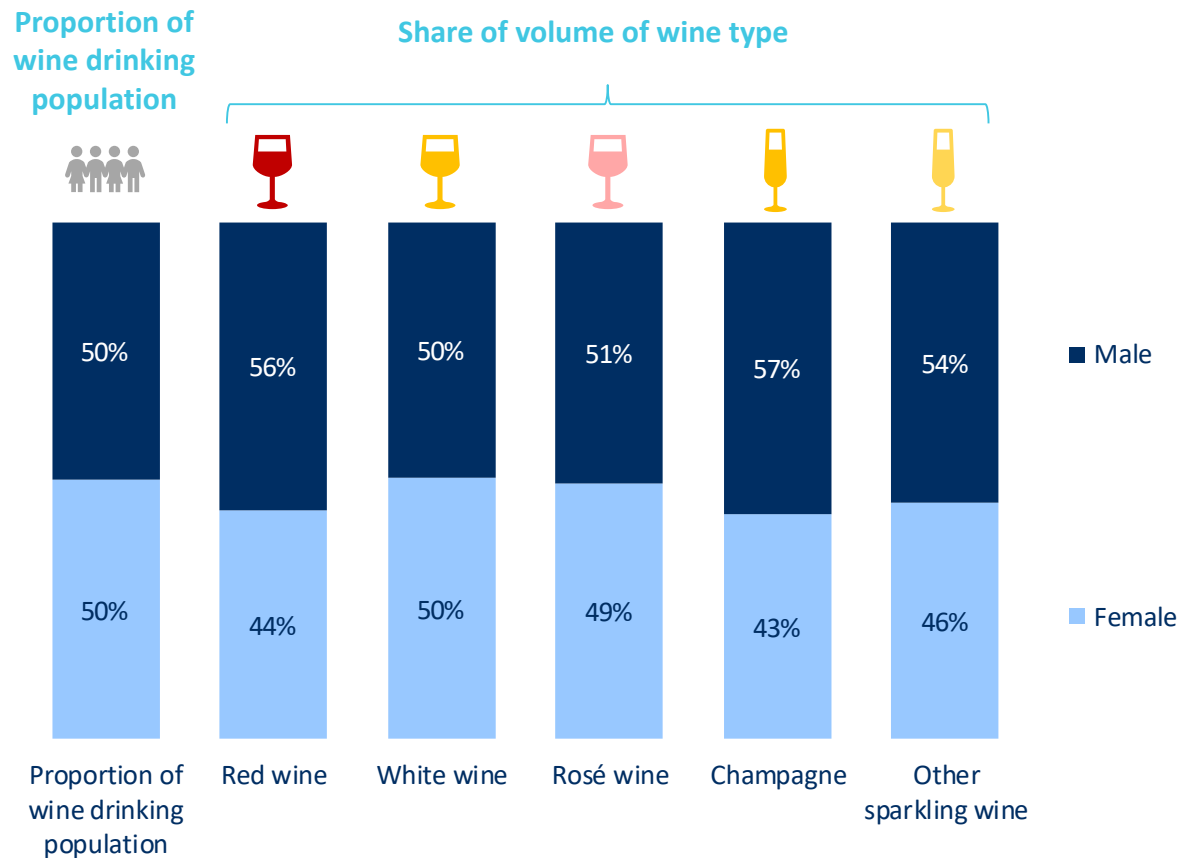
Share of volume of wine types consumed

Men consume a greater volume of red wine and rosé wine than women, and equal quantity of white wine as women

Share of volume of wine types consumed by men and women: 6 key wine markets

% volume of wine types consumed in 6 key wine markets by male and female

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China








Share of volume and frequency of wine consumed

Men drink each type of wine more frequently than women even though there are more women who drink white, rosé and sparkling wine than there are men

Share of volume and frequency of consumption by wine type by men and women

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

	Share of volume of wine types consumed by men and women		Number of wine drinkers (millions)		Average frequency of wine consumption (times/month)	
	Male	Female	Male	Female	Male	Female
 Red wine	56%	44%	99 M	91 M	7.6	6.5
 White wine	50%	50%	81 M	85 M	5.5	5.4
 Rosé wine	51%	49%	38 M	46 M	4.9	3.9
 Champagne	57%	43%	40 M	39 M	3.1	2.5
 Other sparkling wine	54%	46%	50 M	55 M	3.6	2.8

Share of volume and frequency of red wine

There are more men in every market that drink red wine compared to women, and women drink red wine less frequently than men across all markets

Share of volume and frequency of red wine by men and women

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



	Share of volume of red wine consumed by men and women		Number of red wine drinkers (millions)		Average frequency of red wine consumption (times/month)	
	Male	Female	Male	Female	Male	Female
6 key wine markets	56%	44%	99 M	91 M	7.6	6.5
Australia	60%	40%	4.5 M	3.8 M	7.5	5.9
Canada	56%	44%	7.4 M	6.7 M	6.8	6.0
China	56%	44%	24 M	21 M	9.1	8.1
Japan	50%	50%	13 M	15 M	6.1	5.3
UK	58%	42%	11 M	10 M	7.0	5.8
US	56%	44%	40 M	35 M	7.5	6.5

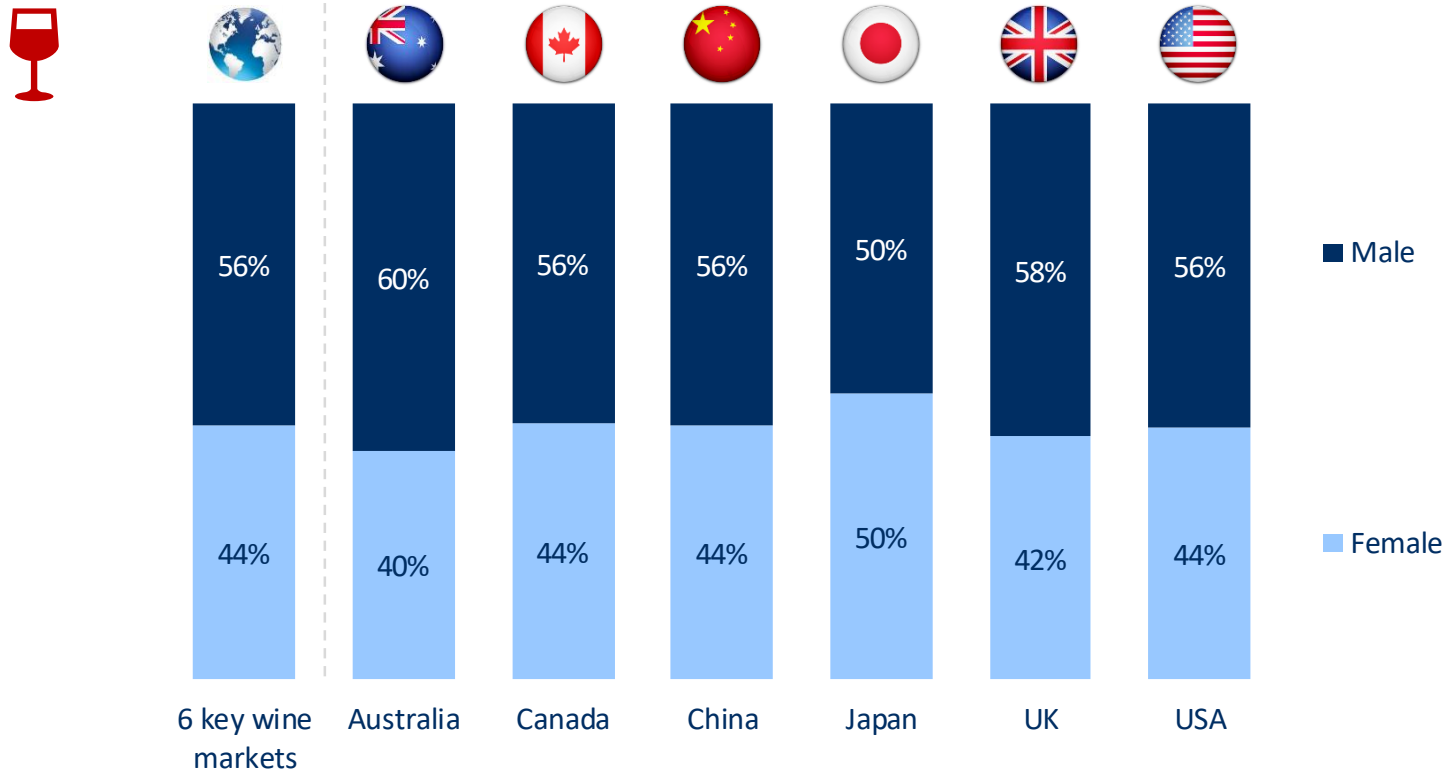
Share of volume of red wine consumed

Men consume a larger proportion of red wine than women, with the exception of Japan, where men and women consume an equal volume

Share of volume of red wine consumed by men and women

% volume of red wine drunk by male and female in each market (calculated based on population of wine drinkers and consumption frequency of red wine)

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



Red varietal consumption

Men tend to consume from a broader range of red varietals compared with women



Red varietal consumption

% who have drunk the following red varietals in the past 6 months

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



Consumed by larger proportion of drinkers



Consumed by smaller proportion of drinkers

	Male	Female
Cabernet Sauvignon	49%	44%
Merlot	44%	41%
Pinot Noir	37%	34%
Shiraz / Syrah	25%	22%
Zinfandel	22%	21%
Malbec	21%	18%
Tempranillo	12%	9%
Grenache/Garnacha	11%	8%
Carménère	10%	7%
Gamay	10%	6%

Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Share of volume and frequency of white wine

Canada is the only market where female drinkers of white wine both outnumber male drinkers of white wine and also drink white wine more frequently than men

Share of volume and frequency of white wine by men and women

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



	Share of volume of white wine consumed by men and women		Number of white wine drinkers (millions)		Average frequency of white wine consumption (times/month)	
	Male	Female	Male	Female	Male	Female
6 key wine markets	50%	50%	81 M	85 M	5.5	5.4
Australia	50%	50%	3.9 M	4.4 M	5.9	5.3
Canada	46%	54%	6.7 M	6.9 M	4.6	5.3
China	52%	48%	15 M	14 M	5.3	5.4
Japan	51%	49%	11 M	12 M	4.6	4.0
UK	48%	52%	11 M	12 M	5.8	5.5
US	49%	51%	33 M	36 M	6.0	5.9

Share of volume of white wine consumed

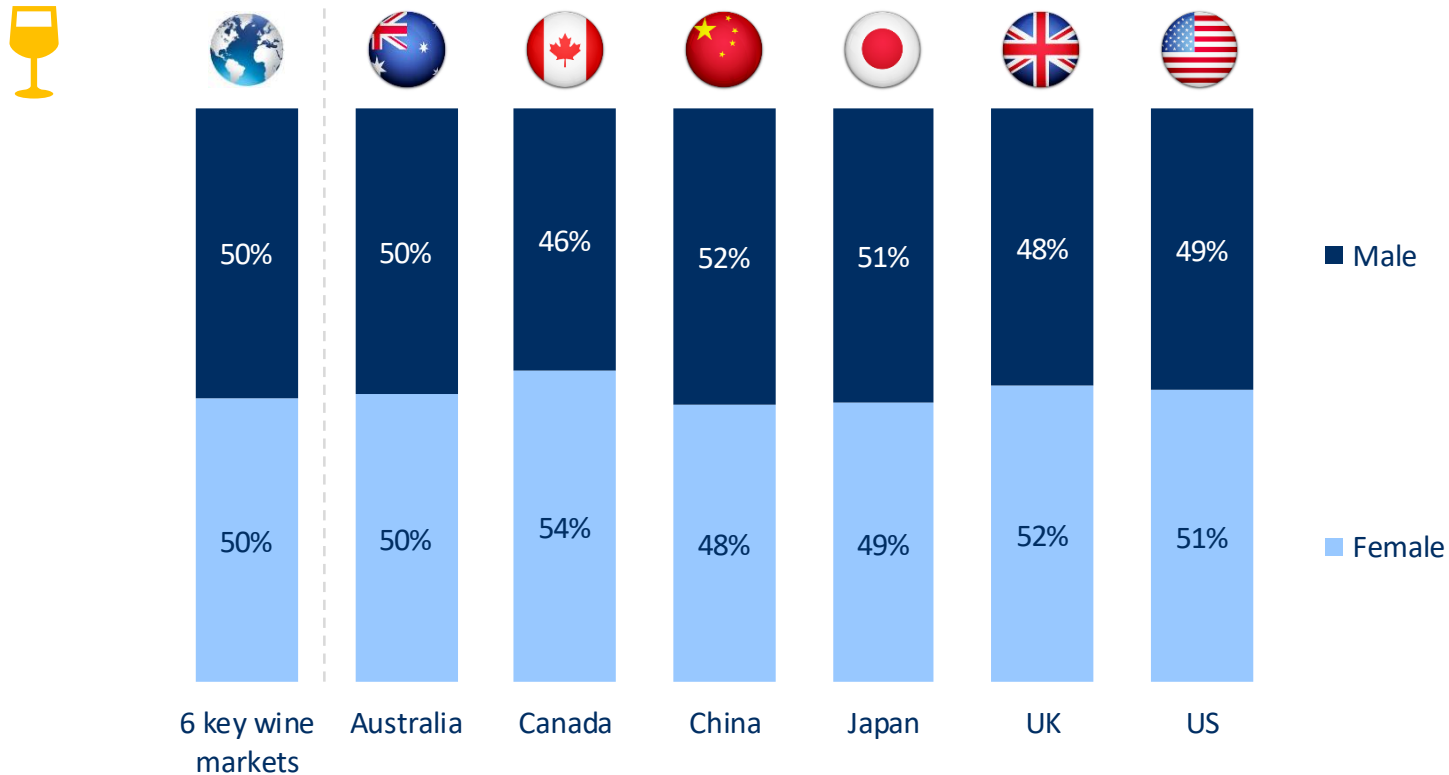
In the US, UK and Canada, women consume a larger volume of white wine than men



Share of volume of white wine consumed by men and women

% volume of white wine drunk by male and female in each market (calculated based on population of wine drinkers and consumption frequency of white wine)

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



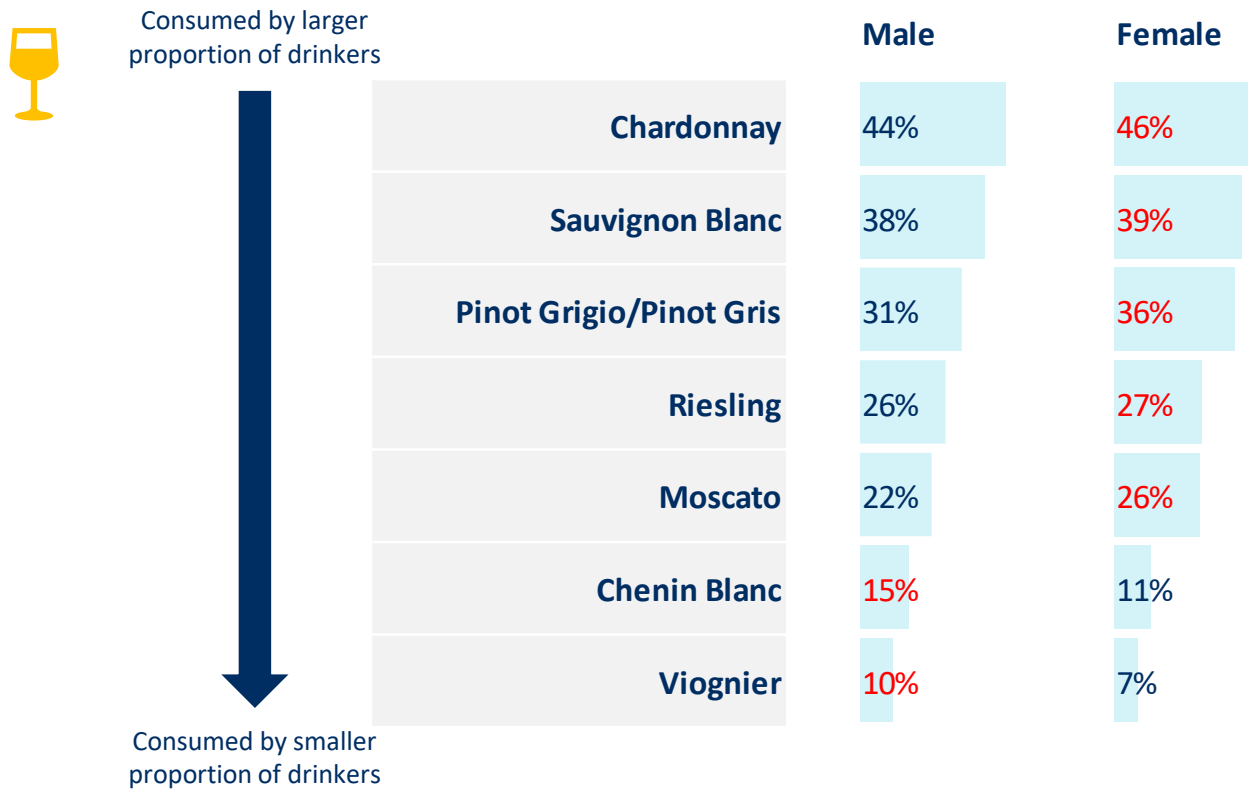
White varietal consumption

A higher proportion of women consume the more mainstream white varietals, whilst men are significantly more likely to drink lesser-known white varietals

White varietal consumption

% who have drunk the following white varietals in the past 6 months

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

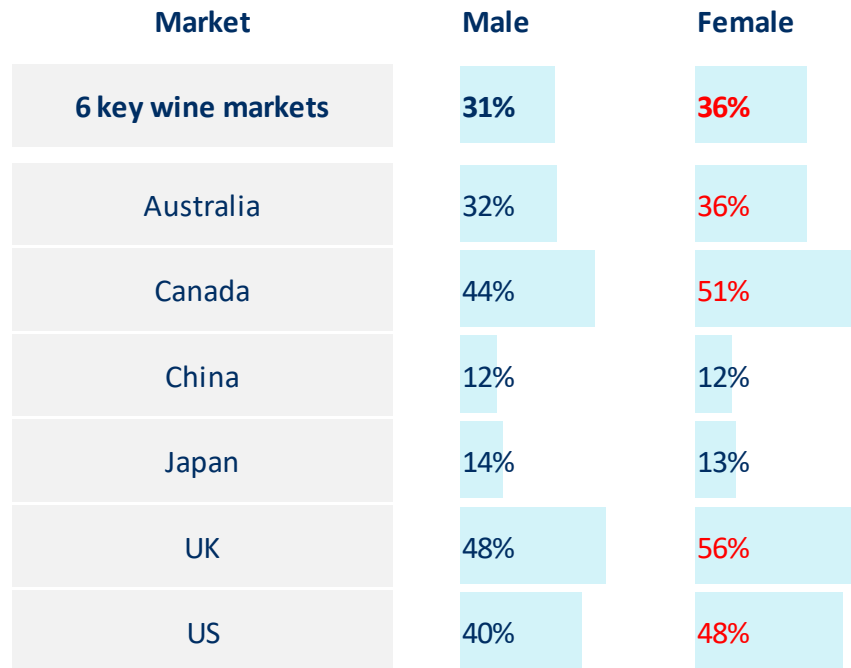
Pinot Grigio / Pinot Gris consumption

A significantly higher proportion of women consume Pinot Grigio, except in China and Japan where there are no gender differences

Pinot Grigio / Pinot Gris consumption

% who have drunk Pinot Grigio/Pinot Gris in the past 6 months

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Moscato consumption

A greater proportion of women in Australia, Canada and US consume Moscato, but this does not hold true in the other markets

Moscato consumption

% who have drunk Moscato in the past 6 months

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



Market	Male	Female
6 key wine markets	22%	26%
Australia	25%	41%
Canada	19%	23%
China	18%	16%
Japan	11%	6%
UK	11%	11%
US	30%	41%

Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Share of volume and frequency of rosé wine

Most markets (except China) have more women who drink rosé wine than men, however, men drink rosé more frequently than women (except UK)

Share of volume and frequency of rosé wine by men and women

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

	Share of volume of rosé wine consumed by men and women		Number of rosé wine drinkers (millions)		Average frequency of rosé wine consumption (times/month)	
	Male	Female	Male	Female	Male	Female
6 key wine markets	51%	49%	38 M	46 M	4.9	3.9
Australia	59%	41%	1.5 M	1.9 M	3.8	2.1
Canada	46%	54%	2.7 M	3.5 M	3.2	2.9
China	59%	41%	10 M	10 M	7.1	5.2
Japan	62%	38%	4 M	5 M	3.6	2.0
UK	34%	66%	5 M	8 M	3.3	4.1
US	47%	53%	14 M	17 M	4.6	4.1

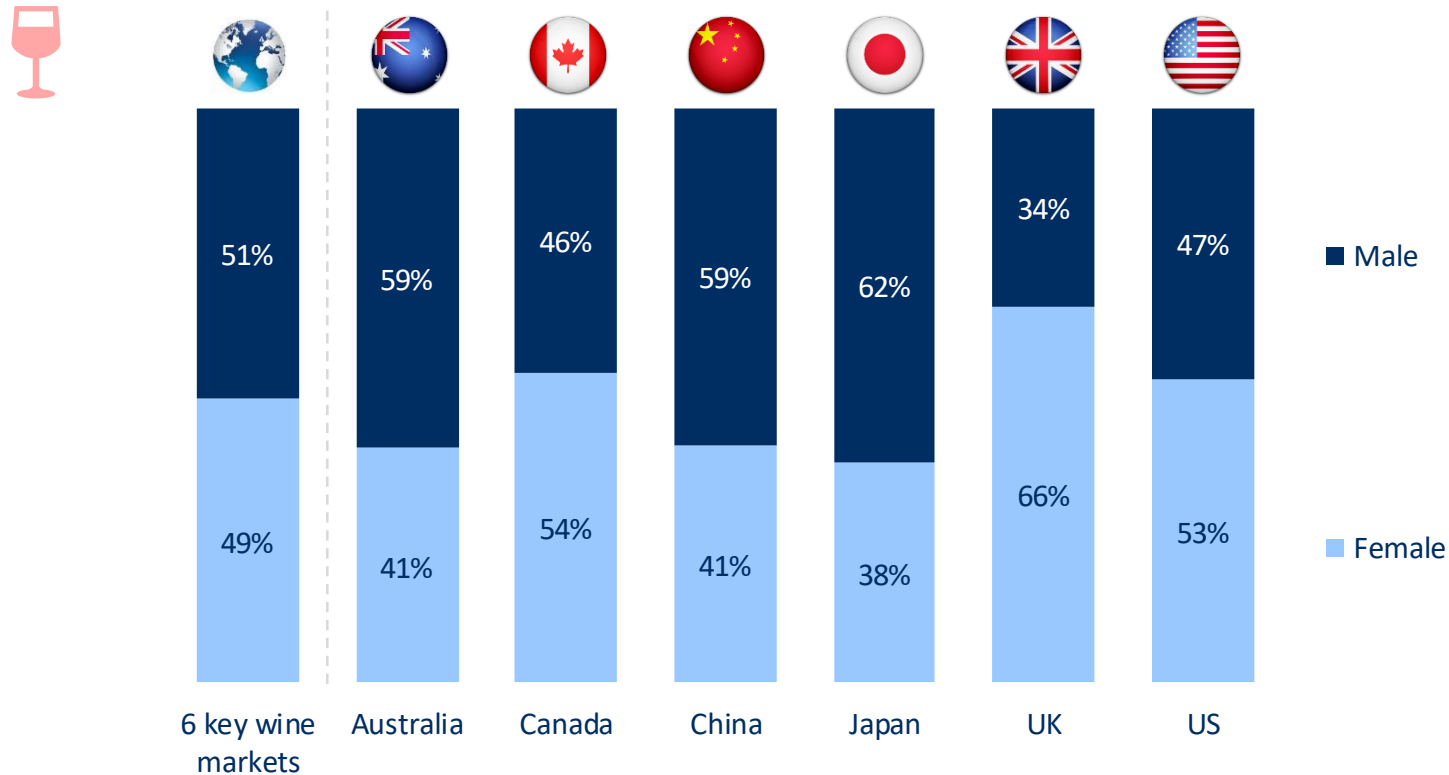
Share of volume of rosé wine consumed

Big variation between markets in terms of rosé and gender, with a higher proportion being consumed by men in Australia, China and Japan contrasted with a higher volume consumed by women in the UK

Share of volume of rosé wine consumed by men and women

% volume of rosé wine drunk by male and female in each market (calculated based on population of wine drinkers and consumption frequency of rosé wine)

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



7 Is sparkling wine mainly a woman's drink?

Evidence says: No

- **Men consume a greater proportion of Champagne and other sparkling wine than women**
 - Although the number of female Champagne drinkers exceeds male drinkers in some markets, women consume Champagne considerably less frequently than men in all markets
 - Only in Canada and the UK do women consume a greater proportion of non-Champagne sparkling wine than men

Share of volume of Champagne consumed

Although the number of female Champagne drinkers exceeds male drinkers in some markets, women consume Champagne considerably less frequently than men in all markets except Canada and China

Share of volume and frequency of Champagne by men and women

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



	Share of volume of Champagne consumed by men and women		Number of Champagne drinkers (millions)		Average frequency of Champagne consumption (times/month)	
	Male	Female	Male	Female	Male	Female
6 key wine markets	57%	43%	40 M	39 M	3.1	2.5
Australia	64%	36%	1.5 M	1.7 M	3.1	1.5
Canada	55%	45%	2.4 M	2.0 M	1.4	1.3
China	50%	50%	12 M	11 M	4.4	4.4
Japan	57%	43%	6 M	7 M	2.8	1.8
UK	60%	40%	5 M	5 M	2.5	1.4
US	65%	35%	14 M	12 M	2.7	1.8

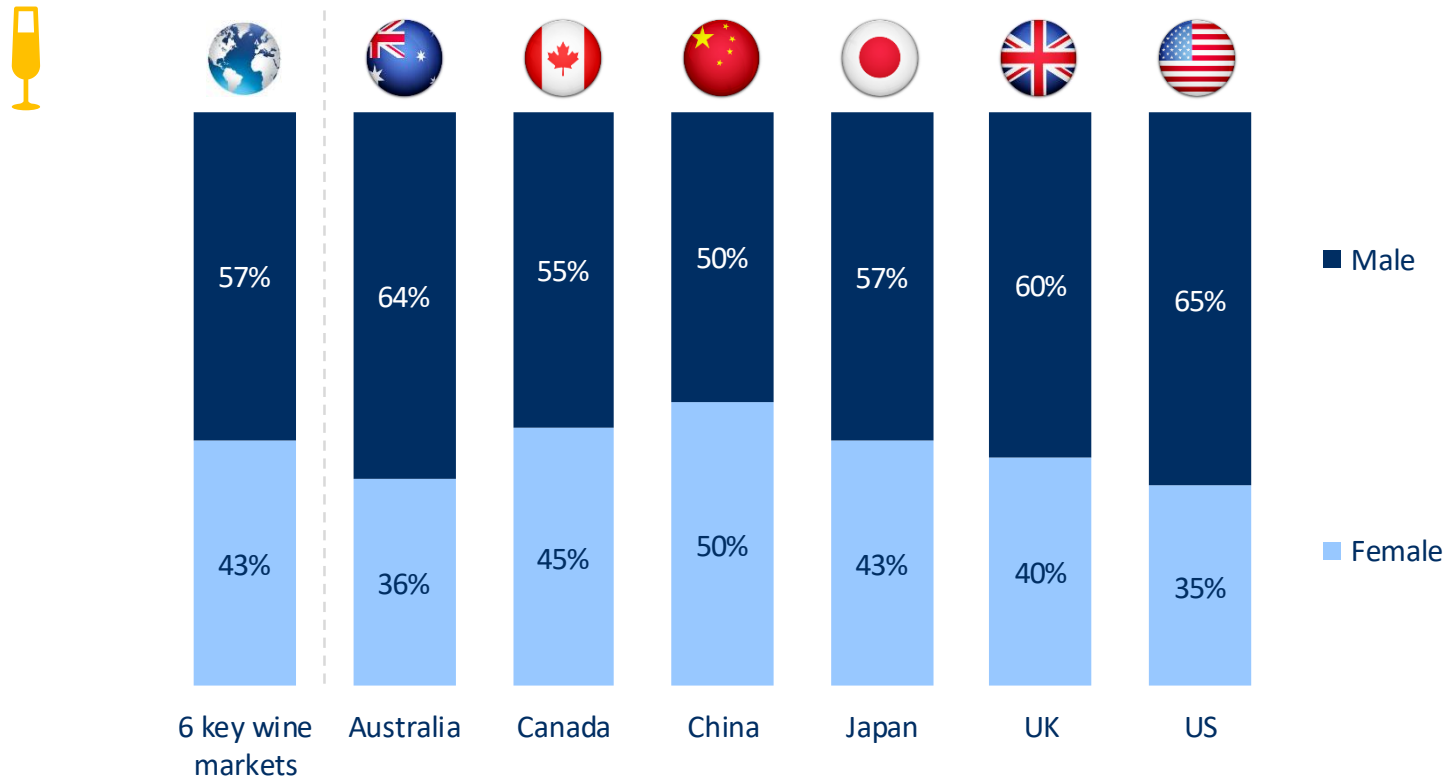
Share of volume of Champagne consumed

Men consume a greater proportion of Champagne, with the only exception being China where the volume of Champagne consumed is equal amongst men and women

Share of volume of Champagne consumed by men and women

% volume of Champagne drunk by male and female in each market (calculated based on population of wine drinkers and consumption frequency of Champagne)

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



Share of volume and frequency of other sparkling wine

Although women outnumber men in terms of the number that drink sparkling wine (except in China), men drink sparkling wine (beyond Champagne) more frequently than women

Share of volume and frequency of other sparkling wine by men and women

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



	Share of volume of other sparkling wine consumed by men and women		Number of other sparkling wine drinkers (millions)		Average frequency of other sparkling wine consumption (times/month)	
	Male	Female	Male	Female	Male	Female
6 key wine markets	54%	46%	50 M	55 M	3.6	2.8
Australia	56%	44%	2.2 M	2.9 M	3.2	2.0
Canada	43%	57%	2.4 M	3.1 M	1.6	1.6
China	56%	44%	17 M	15 M	5.0	4.5
Japan	53%	47%	4 M	5 M	3.5	2.3
UK	42%	58%	8 M	10 M	2.4	2.4
US	60%	40%	17 M	18 M	3.2	2.0

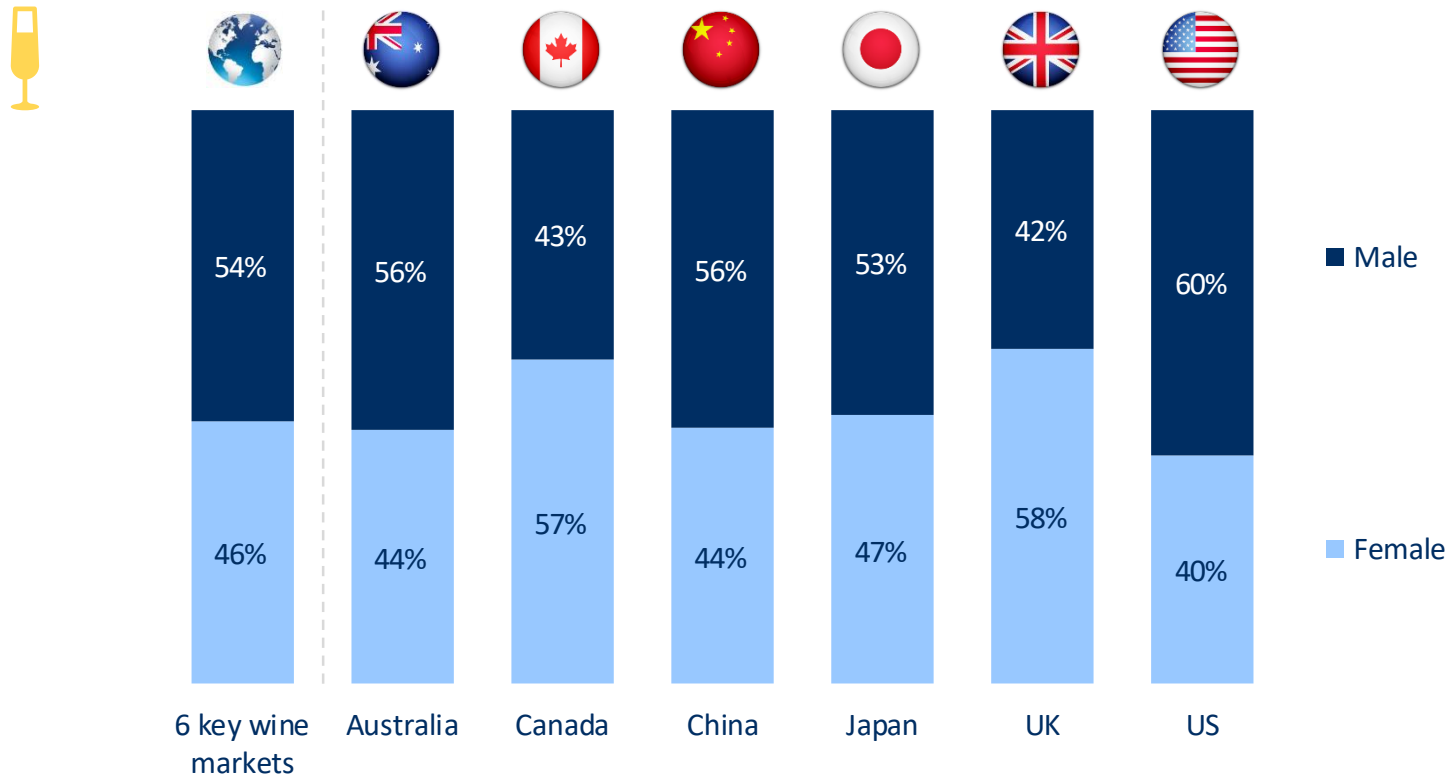
Share of volume of other sparkling wine consumed

Only in Canada and the UK do women consume a greater proportion of non-Champagne sparkling wine than men

Share of volume of other sparkling wine consumed by men and women

% volume of other sparkling wine drunk by male and female in each market (calculated based on population of wine drinkers and consumption frequency of other sparkling wine)

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



Are women more likely to buy sustainable and ethical wines compared with men?

Evidence says: Yes

- In a global context, a **significantly higher proportion of women would consider purchasing organic wine**, sustainably-produced wine and Fairtrade wine than men

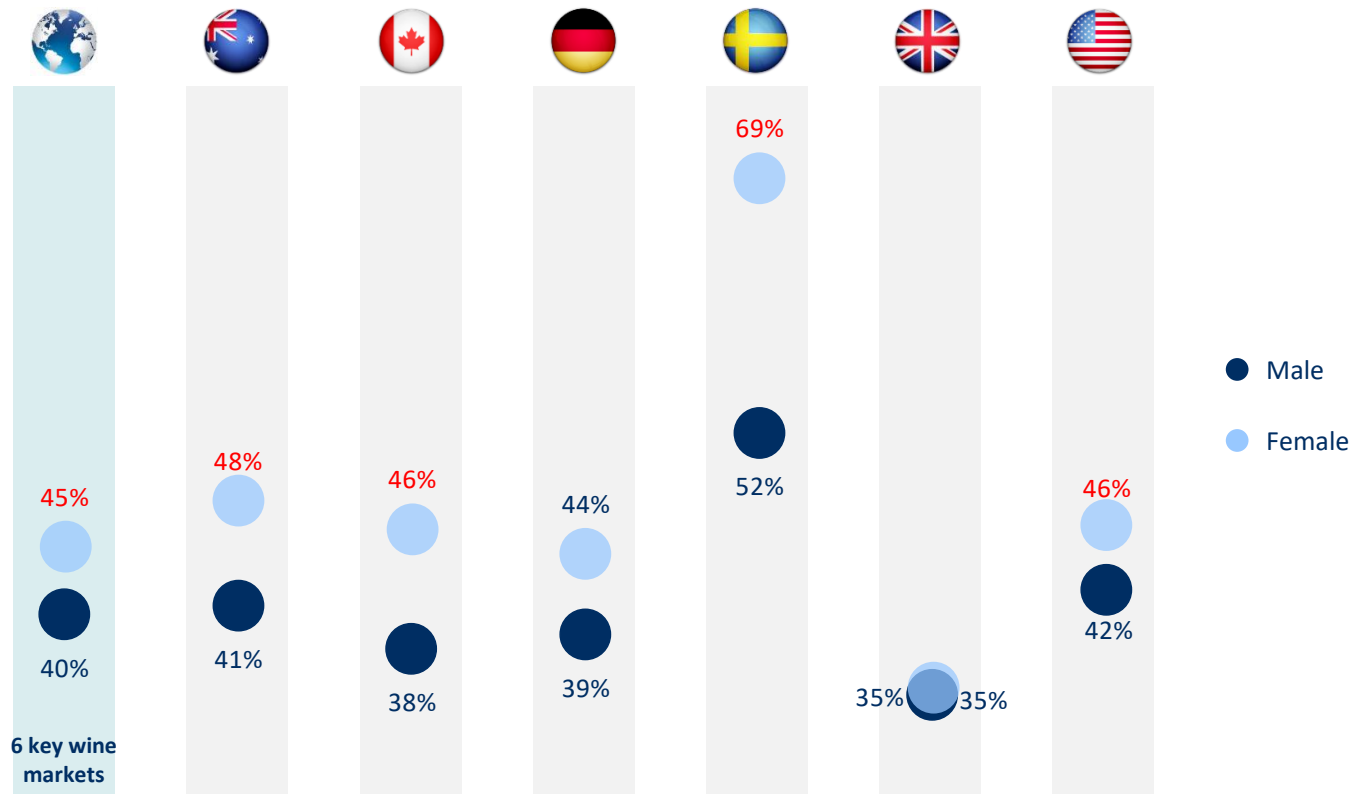
Organic wine purchase consideration

In all markets except UK, a higher proportion of women would consider purchasing organic wine than men

Organic wine purchase consideration*

% who are likely or very likely to purchase organic wine (question asked in "Conscious Bias")

Base: n=2,000 US regular wine drinkers; n=1,000 Australian / Canadian / German / Swedish / UK regular wine drinkers



* Not tested in China and Japan. Showing Germany and Sweden for global comparison

Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Germany, Sweden, UK

Sustainably-produced wine purchase consideration

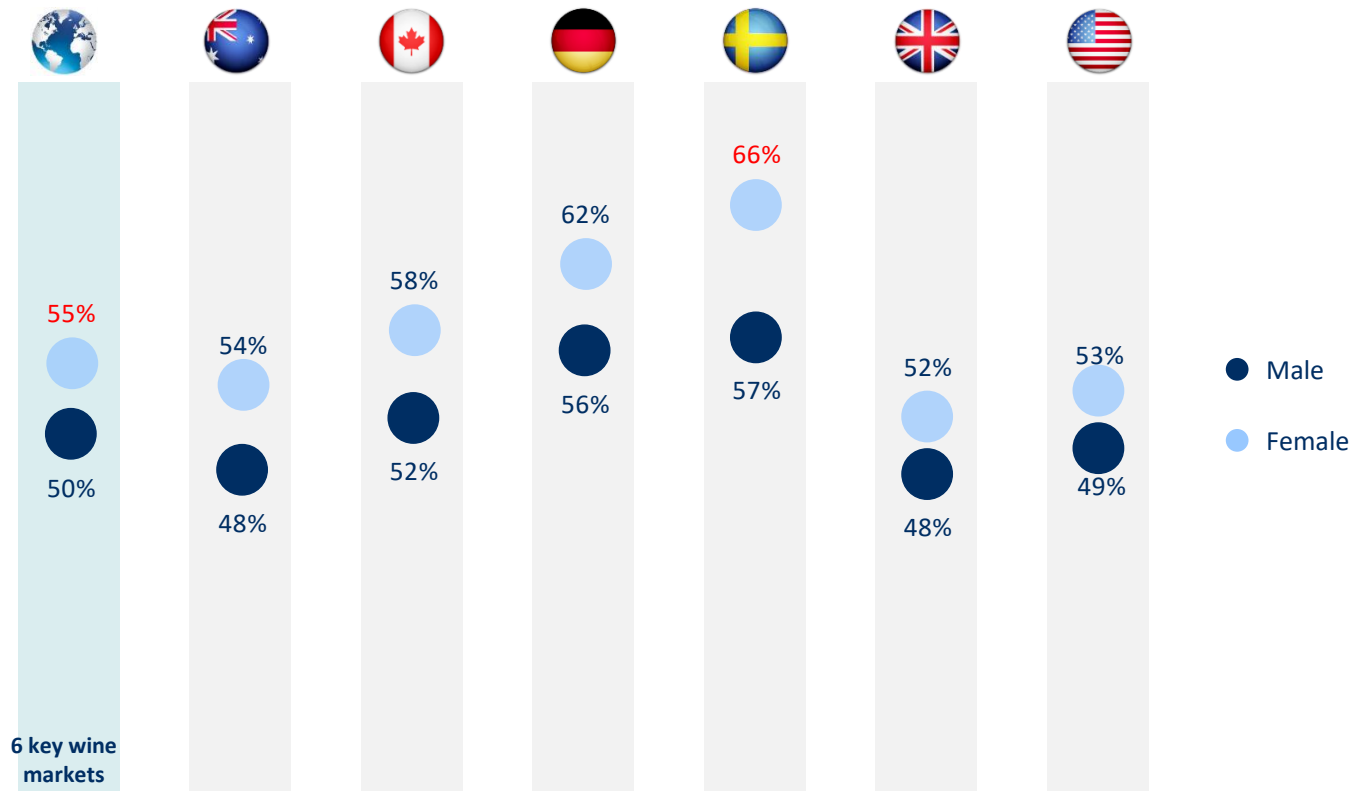
More female wine drinkers are likely to consider purchasing sustainably-produced wine in every market



Sustainably-produced wine purchase consideration*

% who are likely or very likely to purchase sustainably-produced wine (question asked in "Conscious Bias")

Base: n=2,000 US regular wine drinkers; n=1,000 Australian / Canadian / German / Swedish / UK regular wine drinkers



* Not tested in China and Japan. Showing Germany and Sweden for global comparison

Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Germany, Sweden, UK

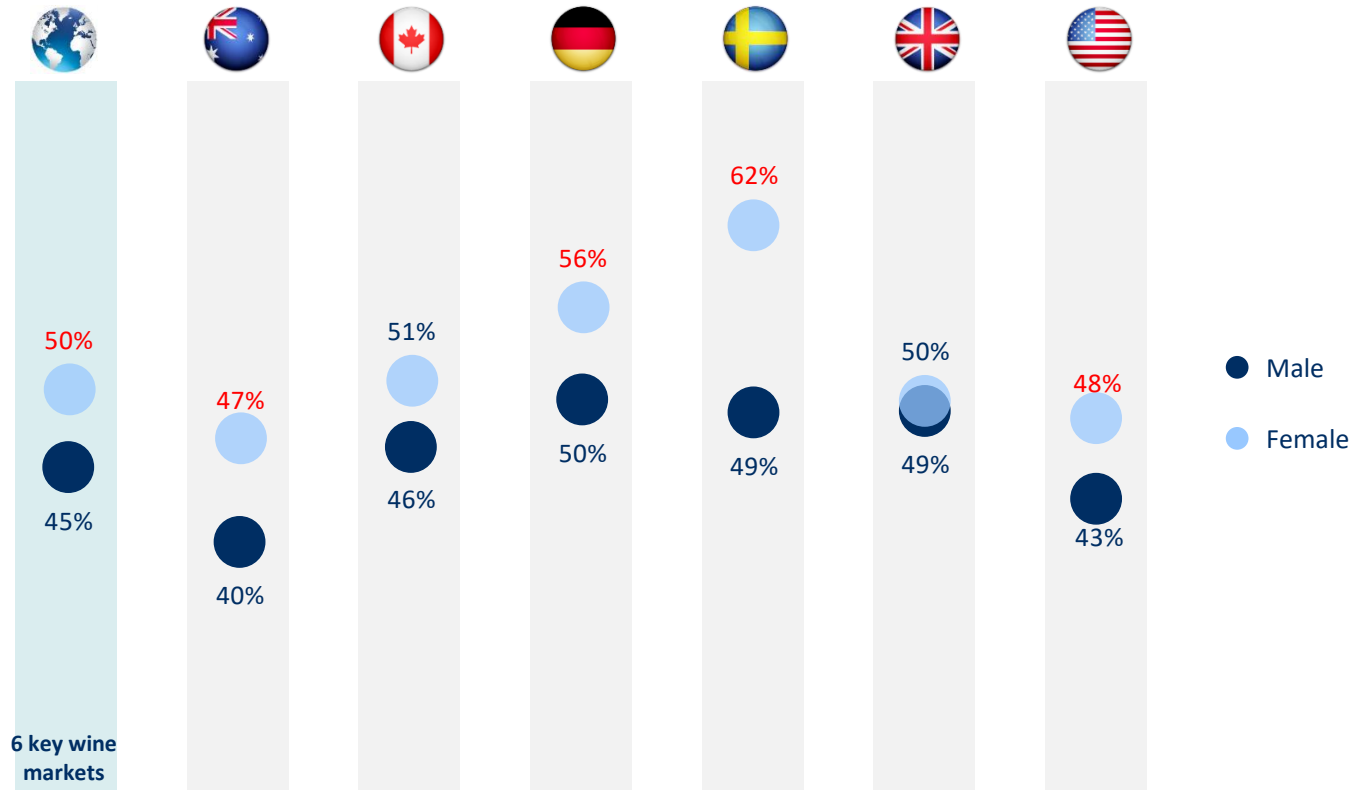
Fairtrade purchase consideration

A significantly higher proportion of women would consider purchasing Fairtrade wine than men in the majority of markets

Fairtrade purchase consideration*

% who are likely or very likely to purchase Fairtrade wine (question asked in "Conscious Bias")

Base: n=2,000 US regular wine drinkers; n=1,000 Australian / Canadian / German / Swedish / UK regular wine drinkers



* Not tested in China and Japan. Showing Germany and Sweden for global comparison

Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Germany, Sweden, UK

Evidence says: Inconclusive

- Both men and women **equally value** labels that convey **traditional** and **prestige cues**
- **Men** tend to prefer labels with **bolder colours** and **cues**
- **Women** tend to prefer labels that have **distinctive designs** and **icons**

Wine label design preference by gender in the UK & US

Label designs tested in Vinitrac® UK and US amongst regular wine drinkers for their perceptions of each label category



Cartoon Retro Vintage Bold Text Simple Contemporary Boutique Simple Elegance Classic Vineyard Stately Prestigious



Simple Contemporary Vintage Text Artisan Simple Elegance Crafted Luxury Vibrant Classic Classic Estate Prestigious



Additionally for men:

Attracted to bolder, traditional cued labels

Both men and women:

Overall strongest appeal for traditional, prestigious labels

Additionally for women:

Attracted to labels delivering distinctiveness, individuality and elegant illustration

Attractiveness of label by gender: US

More appeal for women of labels that deliver a higher degree of distinctiveness and individuality, whilst US male regular wine drinkers more influenced by cues related to tradition and prestige



Dotted line represents the average point of each continuum
 Source: Wine Intelligence Label Design in the US 2017 report

Attractiveness of label by gender: UK

Whilst both men and women in the UK find labels that carry prestige and traditional cues more attractive, women do favour elegant, illustrative designs more than men

Attractiveness for men



Attractiveness for women



/ : Statistically significantly higher/lower than all UK regular wine drinkers at a 95% confidence level

Dotted line represents the average point of each continuum

Source: Wine Intelligence Label Design in the UK 2017 report

Do women favour female-led, -owned or -made wines when given the choice?

Evidence says: Yes

- Women are much more likely to support ‘female-made wines’ when this fact is consciously pointed out to them in an explicit way

The objective is to investigate the influence of **winemaker's gender** on consumers' decision-making when buying wine. An experimental study was carried out to compare the influence of these purchase cues when communicated in two different ways:

- Communicated implicitly on the wine label along with other information (origin, varietal, vintage, etc.) – “*unconscious bias*”
- Communicated explicitly by telling consumers the wine is made by a male / female winemaker – “*conscious bias*”

How likely would you be to purchase each of the following wines if they were available from where you typically purchase wine and if the price was right for you?

Unconscious bias

(shown on wine label with other information)

Proudly Made by Mary Farrington

Proudly Made by John Farrington



Conscious bias

(shown as text, without other information about the wine; translated into local languages when tested in Germany and Sweden)

Wine made by a female winemaker

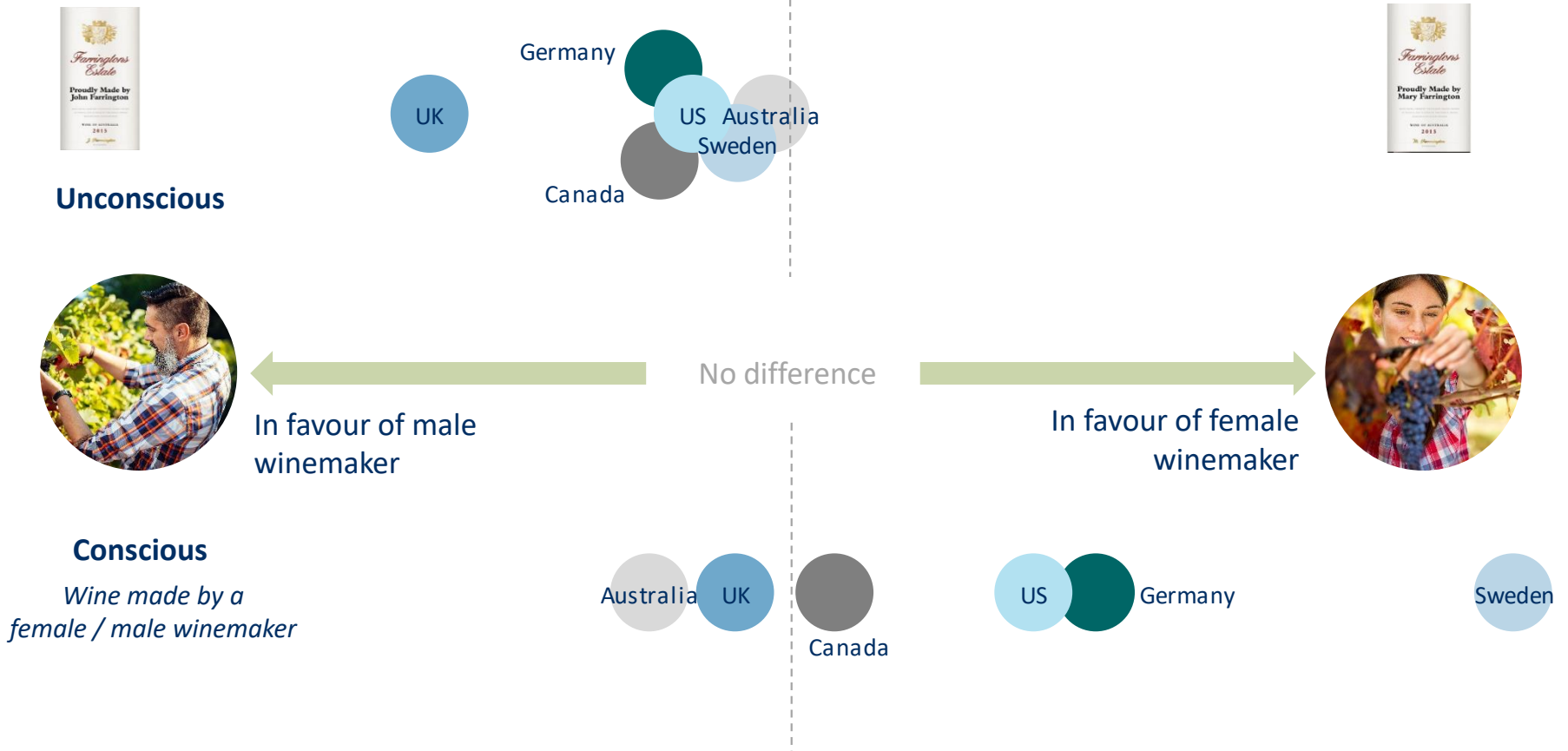
Wine made by a male winemaker

Support for male / female winemaker

Unconsciously, 'John' is more favoured over 'Mary', whilst the more conscious decision of a female winemaker in general garners more appeal

Support for male / female winemaker*

Base: n=2,000 US regular wine drinkers; n=1,000 Australian / Canadian / German / Swedish / UK regular wine drinkers



* Not tested in China and Japan. Showing Germany and Sweden for global comparison

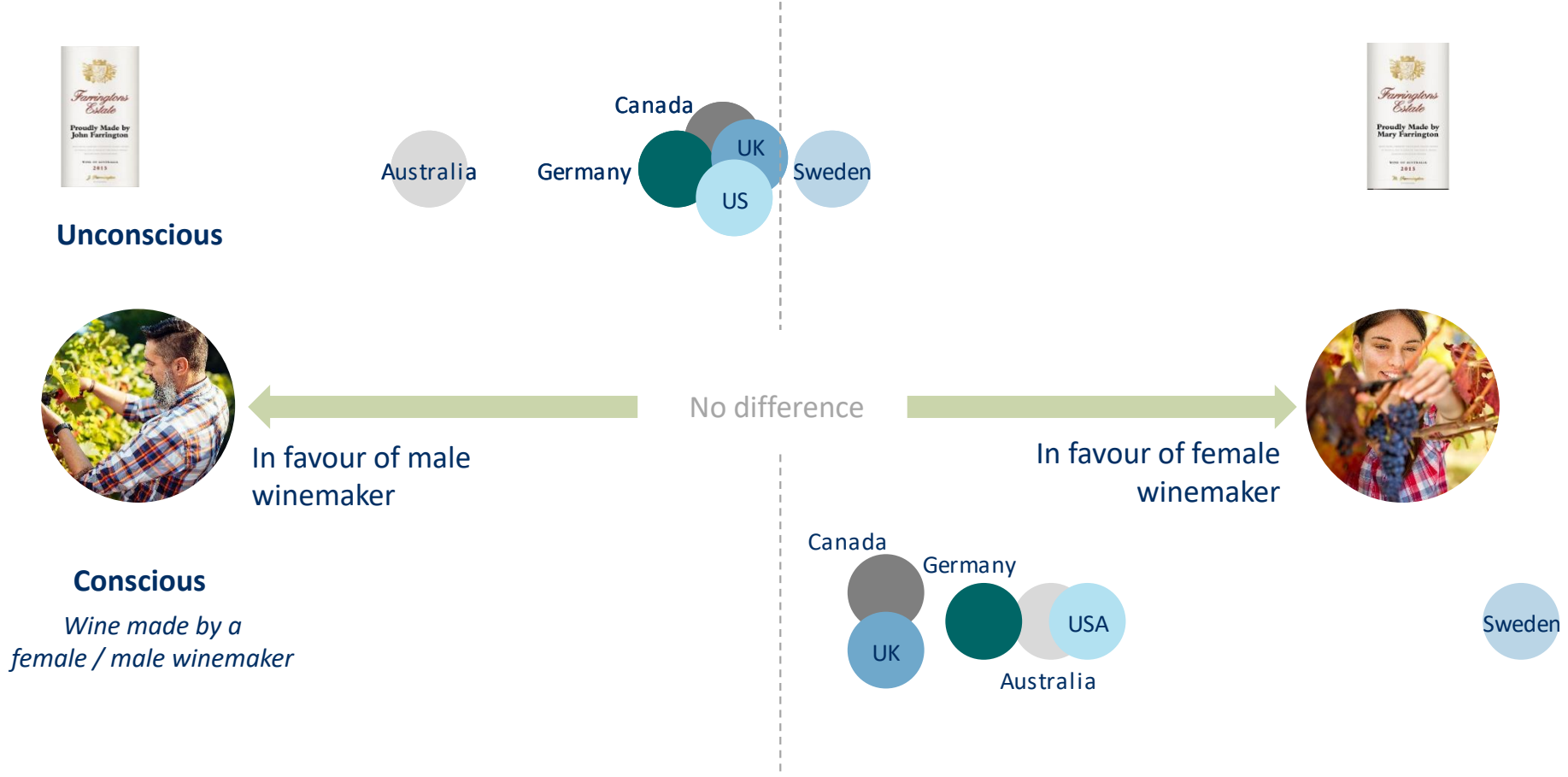
Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Germany, Sweden, UK

Support for male / female winemaker

Women much more likely to support 'women made wines' when this fact is consciously pointed out to them in an explicit way

Support for male / female winemaker*

Base: **female** regular wine drinkers in Australia, Canada, Germany, Sweden, UK, US



* Not tested in China and Japan. Showing Germany and Sweden for global comparison

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Germany, Sweden, UK

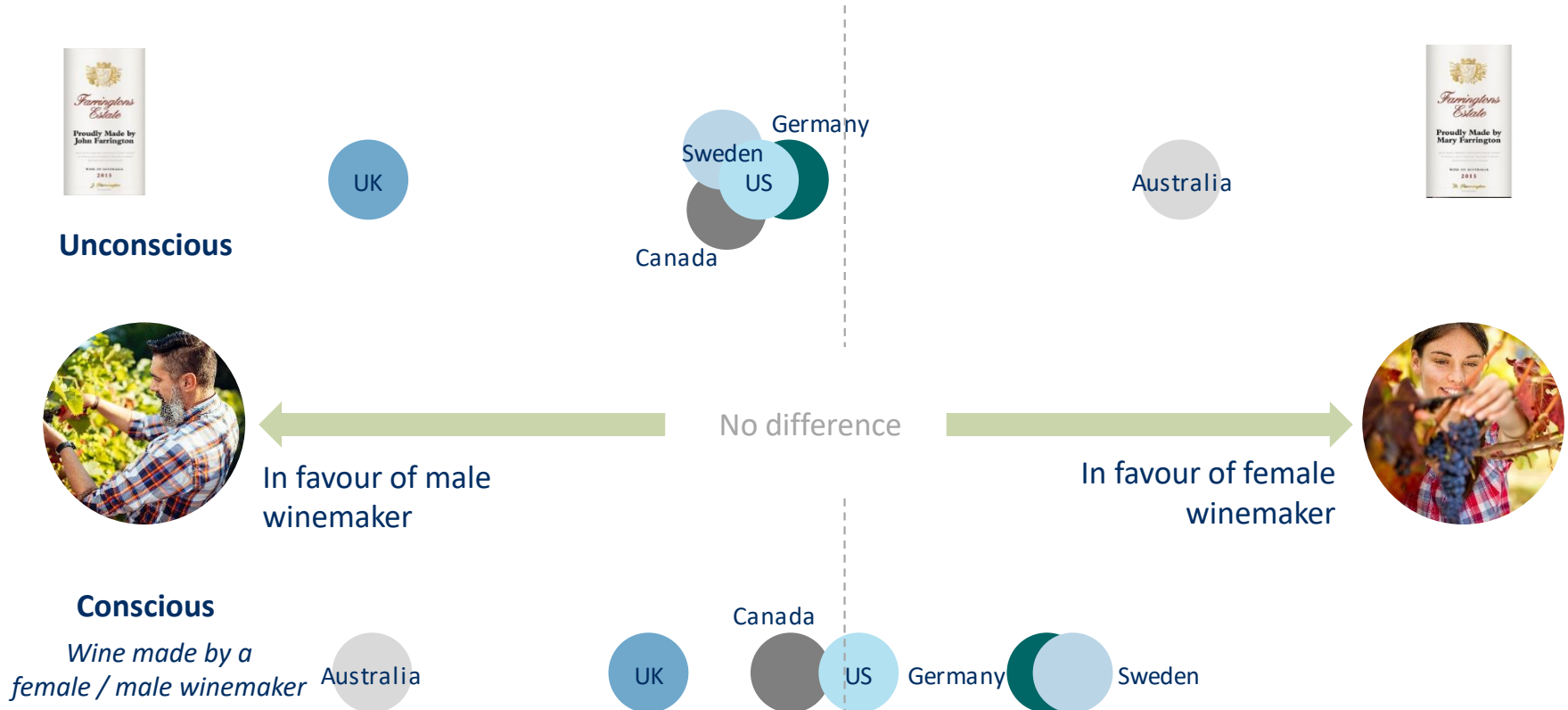
Support for male / female winemaker:

Male wine drinkers in Germany and Sweden favour the notion of a female wine marker over a male winemaker, which is in contrast to the other markets



Support for male / female winemaker*

Base: male regular wine drinkers in Australia, Canada, Germany, Sweden, UK, US



* Not tested in China and Japan. Showing Germany and Sweden for global comparison

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Germany, Sweden, UK

Evidence says: No

- In a global context, **men are more likely to claim** that they are actively reducing their alcohol consumption
 - Women in the UK are significantly more likely to be reducing alcohol consumption than men, contrasting with the US where men are more likely to be moderating than women
 - Among those who are actively moderating, **men are more likely to switch to lower-alcohol options** while **women tend to abstain from alcohol at some occasions**

Alcohol moderation

Men are more likely to claim that they are actively reducing their alcohol consumption, and are achieving this by switching to lower alcohol options, whilst women are significantly more likely to abstain at some occasions in a bid to moderate consumption



Reducing alcohol consumption

% those who are and who are not actively reducing their alcohol consumption
Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China



- I'm actively reducing the amount of alcohol I drink
- I'm NOT actively reducing the amount of alcohol I drink

Moderation behaviour

% those who choose one of the two options for moderating their alcohol consumption
Base: Those who are actively reducing their alcohol consumption within the 6 key markets



- I'm NOT DRINKING ALCOHOL at some occasions
- I'm switching to LOWER ALCOHOL OPTIONS at some occasions

* Statistically significantly higher than the other gender group at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Actively moderating alcohol consumption



Women in the UK are significantly more likely to be reducing alcohol consumption than men, contrasting with the US where men are more likely to be moderating than women

Actively moderating alcohol consumption

% those who are actively reducing their alcohol consumption

Base: n=2,000 regular wine drinkers in US; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

	All wine drinkers	Male	Female
6 key wine markets	44%	46%	43%
Australia	44%	47%	42%
Canada	29%	27%	31%
China	76%	76%	75%
Japan	35%	36%	34%
UK	43%	37%	48%
US	33%	37%	30%

Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

Ways of moderating alcohol

Among those who are actively moderating, men are more likely to switch to lower alcohol options while women tend to abstain from alcohol at some occasions

Moderation by switching to lower alcohol options: Detail by market

% those who are actively reducing by switching to LOWER ALCOHOL OPTIONS at some occasions

Base: Those who are actively reducing their alcohol consumption within the 6 key markets

	All wine drinkers	Male	Female
6 key wine markets	53%	57%	49%
Australia	35%	43%	27%
Canada	36%	40%	32%
China	75%	78%	72%
Japan	39%	45%	33%
UK	36%	37%	36%
US	42%	46%	38%

Moderation by not drinking alcohol: Detail by market

% those who are actively reducing by NOT DRINKING ALCOHOL at some occasions

Base: Those who are actively reducing their alcohol consumption within the 6 key markets

	All wine drinkers	Male	Female
6 key wine markets	47%	43%	51%
Australia	65%	57%	73%
Canada	64%	60%	68%
China	25%	22%	28%
Japan	61%	55%	67%
UK	64%	63%	64%
US	58%	54%	62%

Red: statistically significantly higher than the other gender at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Global, July 2018, n=2,000 regular wine drinkers in USA; n=1,000 regular wine drinkers in Australia, Canada, Japan, UK; n=1,000 urban upper-middle class imported wine drinkers in China

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Wine consumption and gender – the evidence



Four of our gender-and-wine hypotheses supported, four refuted, and four remaining inconclusive

	HYPOTHESIS	EVIDENCE SAYS
1	Do women drink more wine than men?	NO
2	Do men spend more money on wine than women, with luxury wine more a male domain?	YES
3	Is wine more integrated into the everyday lives of women compared with men?	NO
4	Are men more knowledgeable about wine compared with women?	?
	Are men more confident with wine compared with women?	?
5	Do men rely more on external validation of their wine choices compared with women?	YES
6	Is red wine for men?	?
	Is white / rosé wine for women?	?
7	Is sparkling wine mainly a woman's drink?	NO
8	Are women more likely to buy sustainable and ethical wines compared with men?	YES
9	Do men and women like different kinds of label designs?	?
10	Do women favour female-led, -owned or -made wines when given the choice?	YES
11	Are women more conscious of moderating their alcohol consumption compared with men?	NO

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- Data collection:
 - The data for this report was collected in July 2018
 - Data was gathered via Wine Intelligence’s Vinitrac[®] Australia online survey and is representative of all Australian regular wine drinkers

- Screening criteria:
 - Respondents were required to drink wine at least once per month, to drink at least red, white or rosé wine and to buy wine in the off-premise and / or in the on-premise

- Data processing:
 - Invalid responses (those who completed the survey too quickly, or who “straight-lined” through selected questions) were removed from the sample
 - The survey was post-weighted in terms of age, gender

- Sample distribution:
 - The distribution of the sample is shown in the table:

Australia - July 2018		
<i>Sample size n=</i>		<i>1000</i>
Gender	Male	50%
	Female	50%
	<i>Total</i>	<i>100%</i>
Age	LDA-24	13%
	25-34	19%
	35-44	16%
	45-54	15%
	55-64	16%
	65 and over	20%
	<i>Total</i>	<i>100%</i>

Source: Wine Intelligence, Vinitrac[®] Australia, July 2018 (n=1,000), Australian regular wine drinkers

- Data collection:
 - The data for this report was collected in July 2018
 - Data was gathered via Wine Intelligence’s Vinitrac® Canada online survey and is representative of all Canadian regular wine drinkers

- Screening criteria:
 - Respondents were required to drink wine at least once per month, to drink at least red, white or rosé wine and to buy wine in the off-premise and / or in the on-premise

- Data processing:
 - Invalid responses (those who completed the survey too quickly, or who “straight-lined” through selected questions) were removed from the sample
 - The survey was post-weighted in terms of age, gender and region

- Sample distribution:
 - The distribution of the sample is shown in the table:

Canada - July 2018		
<i>Sample size n=</i>		<i>1000</i>
Gender	Male	50%
	Female	50%
	<i>Total</i>	<i>100%</i>
Age	LDA-24	9%
	25-34	20%
	35-44	22%
	45-54	13%
	55-64	18%
	65 and over	18%
	<i>Total</i>	<i>100%</i>
Region	Quebec	25%
	Ontario	39%
	West	31%
	Other Provinces	5%
		<i>100%</i>

Source: Wine Intelligence, Vinitrac® Canada, July 2018 (n=1,000), Canadian regular wine drinkers

Vinitrac® methodology

China



- Vinitrac® data for this study were collected in July 2018
- Data were gathered via Wine Intelligence’s Vinitrac® online survey
- The respondents in both waves meet the following requirements:
 - Urban upper-middle class: personal monthly income before tax at least 6,000 RMB in Beijing, Guangzhou, Shanghai, Hangzhou and Shenzhen; or 5,000 RMB in Wuhan, Chengdu, Shenyang, Chongqing, Changsha, Zhengzhou and Guiyang
 - 18-54 years old
 - Residents of Beijing, Guangzhou, Shanghai, Wuhan, Chengdu, Shenyang, Hangzhou, Shenzhen, Chongqing, Changsha, Zhengzhou and Guiyang
 - Drink imported grape-based wine at least twice a year
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The survey was quota-based and post-weighted to be representative of Chinese urban upper-middle class imported wine drinkers in terms of age, gender and geography
- The distribution of the sample is shown in the table:

China - July 2018		
Sample size n=		1000
Gender	Male	50%
	Female	50%
	Total	100%
Age	18-24	8%
	25-34	43%
	35-44	27%
	45-54	22%
	Total	100%
Region	Shanghai, Hangzhou	20%
	Beijing	17%
	Shenyang, Zhengzhou	10%
	Guangzhou, Shenzhen	18%
	Changsha, Wuhan	8%
	Chengdu, Guiyang	12%
	Chongqing	15%
	Total	100%
Income	Less than RMB 8,000	19%
	RMB 8,000-9,999	25%
	RMB 10,000-14,999	35%
	RMB 15,000 or above	21%
	Total	100%
Imported wine frequency	2-5 times per year	15%
	About once every two months	24%
	1-3 times per month	38%
	Once a week or more often	23%
	Total	100%

Source: Wine Intelligence, Vinitrac® China, July 2018 (n=1,000), Chinese urban upper-middle imported wine drinkers

- Data collection:
 - The data for this report was collected in July 2018
 - Data was gathered via Wine Intelligence’s Vinitrac® Germany online survey and is representative of all German regular wine drinkers

- Screening criteria:
 - Respondents were required to drink wine at least once per month, to drink at least red, white or rosé wine and to buy wine in the off-premise and / or in the on-premise

- Data processing:
 - Invalid responses (those who completed the survey too quickly, or who “straight-lined” through selected questions) were removed from the sample
 - The survey was post-weighted in terms of age, gender and region

- Sample distribution:
 - The distribution of the sample is shown in the table:

Germany - July 2018		
		Sample size n=
Gender	Male	50%
	Female	50%
	<i>Total</i>	<i>100%</i>
Age	LDA-24	4%
	25-34	12%
	35-44	16%
	45-54	22%
	55 and over	46%
	<i>Total</i>	<i>100%</i>
Region	Baden-Wuerttemberg	15%
	Bayern	17%
	Berlin	4%
	Brandenburg + Mecklenburg-Vorpommern	5%
	Niedersachsen + Bremen	10%
	Schleswig-Holstein + Hamburg	6%
	Hessen	7%
	Nordrhein-Westfalen	19%
	Rheinland-Pfalz + Saarland	6%
	Sachsen +Sachsen-Anhalt +Thingen	11%
	<i>Total</i>	<i>100%</i>

Source: Wine Intelligence, Vinitrac® Germany, July 2018 (n=1,001), German regular wine drinkers

- Data collection:
 - The data for this report was collected in July 2018
 - Data was gathered via Wine Intelligence's Vinitrac[®] Japan online survey and is representative of all Japanese regular wine drinkers
- Screening criteria:
 - Respondents were required to drink wine at least once per month, to drink at least red, white or rosé wine and to buy wine in the off-premise and / or in the on-premise
- Data processing:
 - Invalid responses (those who completed the survey too quickly, or who "straight-lined" through selected questions) were removed from the sample
 - The survey was post-weighted in terms of age and gender
- Sample distribution:
 - The distribution of the sample is shown in the table:

Japan - July 2018		
Sample size n=		1000
Gender	Male	47%
	Female	53%
	Total	100%
Age	LDA-24	8%
	25-34	14%
	35-44	13%
	45-54	16%
	55 and over	49%
	Total	100%

Source: Wine Intelligence, Vinitrac[®] Japan, July 2018 (n=1,000), Japanese regular wine drinkers

- Data collection:
 - The data for this report was collected in July 2018
 - Data was gathered via Wine Intelligence’s Vinitrac[®] Sweden online survey and is representative of all Swedish regular wine drinkers

- Screening criteria:
 - Respondents were required to drink wine at least once per month, to drink at least red, white or rosé wine and to buy wine in the off-premise and / or in the on-premise

- Data processing:
 - Invalid responses (those who completed the survey too quickly, or who “straight-lined” through selected questions) were removed from the sample
 - The survey was post-weighted in terms of age and gender

- Sample distribution:
 - The distribution of the sample is shown in the table:

Sweden - July 2018		
<i>Sample size n=</i>		<i>1000</i>
Gender	Male	51%
	Female	49%
	<i>Total</i>	<i>100%</i>
Age	LDA-24	9%
	25-34	15%
	35-44	15%
	45-54	17%
	55 and over	44%
	<i>Total</i>	<i>100%</i>

Source: Wine Intelligence, Vinitrac[®] Sweden, July 2018 (n=1,000), Swedish regular wine drinkers

- Data collection:
 - The data for this report was collected in July 2018
 - Data was gathered via Wine Intelligence’s Vinitrac[®] UK online survey and is representative of all UK regular wine drinkers

- Screening criteria:
 - Respondents were required to drink wine at least once per month, to drink at least red, white or rosé wine and to buy wine in the off-premise and / or in the on-premise

- Data processing:
 - Invalid responses (those who completed the survey too quickly, or who “straight-lined” through selected questions) were removed from the sample
 - The survey was post-weighted in terms of age, gender, region and annual pre-tax household income

- Sample distribution:
 - The distribution of the sample is shown in the table:

UK - July 2018		
		Sample size n=
		1000
Gender	Male	48%
	Female	52%
	<i>Total</i>	<i>100%</i>
Age	LDA-24	9%
	25-34	16%
	35-44	16%
	45-54	16%
	55-64	15%
	65 and over	27%
	<i>Total</i>	<i>100%</i>
Regions	North	21%
	Midlands	17%
	East Anglia + South East	23%
	London	13%
	South West	9%
	Wales	5%
	Scotland	9%
	Northern Ireland	3%
	<i>Total</i>	<i>100%</i>
Annual pre-tax household income	Under £19,999	12%
	£20,000 - £29,999	17%
	£30,000 - £39,999	19%
	£40,000 - £59,999	19%
	Over £60,000	23%
	Prefer not to answer	10%
	<i>Total</i>	<i>100%</i>

Source: Wine Intelligence, Vinitrac[®] UK, July 2018 (n=1,000), UK regular wine drinkers

- Data collection:
 - The data for this report was collected in July 2018
 - Data was gathered via Wine Intelligence’s Vinitrac® US online survey and is representative of all US regular wine drinkers

- Screening criteria:
 - Respondents were required to drink wine at least once per month, to drink at least red, white or rosé wine and to buy wine in the off-premise and / or in the on-premise

- Data processing:
 - Invalid responses (those who completed the survey too quickly, or who “straight-lined” through selected questions) were removed from the sample
 - The survey was post-weighted in terms of age, gender and region

- Sample distribution:
 - The distribution of the sample is shown in the table:

US - July 2018		
		Sample size n=
		2000
Gender	Male	50%
	Female	50%
	<i>Total</i>	<i>100%</i>
Age	LDA-24	8%
	25-34	22%
	35-44	14%
	45-54	18%
	55-64	18%
	65 and over	21%
	<i>Total</i>	<i>100%</i>
Region	New England	6%
	Middle Atlantic	14%
	East North Central	13%
	West North Central	4%
	South Atlantic	20%
	East South Central	5%
	West South Central	11%
	Mountain	6%
	Pacific	21%
	<i>Total</i>	<i>100%</i>

Source: Wine Intelligence, Vinitrac® US, July 2018 (n=2,000), US regular wine drinkers

Wine Intelligence wine label categories in the UK market

Overview of the 10 categories



Wine Intelligence wine label categories in the US market

Overview of the 9 categories



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

Definitions and Interpretation

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

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

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

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

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

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

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

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

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

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

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

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

1. Engagement

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

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

2.. Copyright

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

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

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

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

3. Licence

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

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

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

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

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

4. Warranties

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

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

Please contact Wine Intelligence for full terms and conditions



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