WINE INTELLIGENCE

WINE E-COMMERCE IN THE UK MARKET

MARCH 2021

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UK WINE E-COMMERCE: REPORT INFORMATION

Definitions of online 'users' and 'considerers'

The following online wine-buying channels were added to usage and consideration questions within each market in order to define online 'users' and 'considerers':

- From an online retailer
- From a delivery app
- From a supermarket / hypermarket website
- From a winery's website
- From a wine club / membership organisation

Notes:

- 'On the internet' was used to define online users and considerers in Ireland
- Online channels shown to respondents varied by market, depending on national legislation and presence / maturity of certain sub-channels

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GLOBAL CONTEXT: E-COMMERCE USERS AND CONSIDERERS

E-commerce for wine is mainstream for Chinese wine drinkers, and is taking meaningful share of market in other territories; note also the potential in the UK with two thirds are considerers

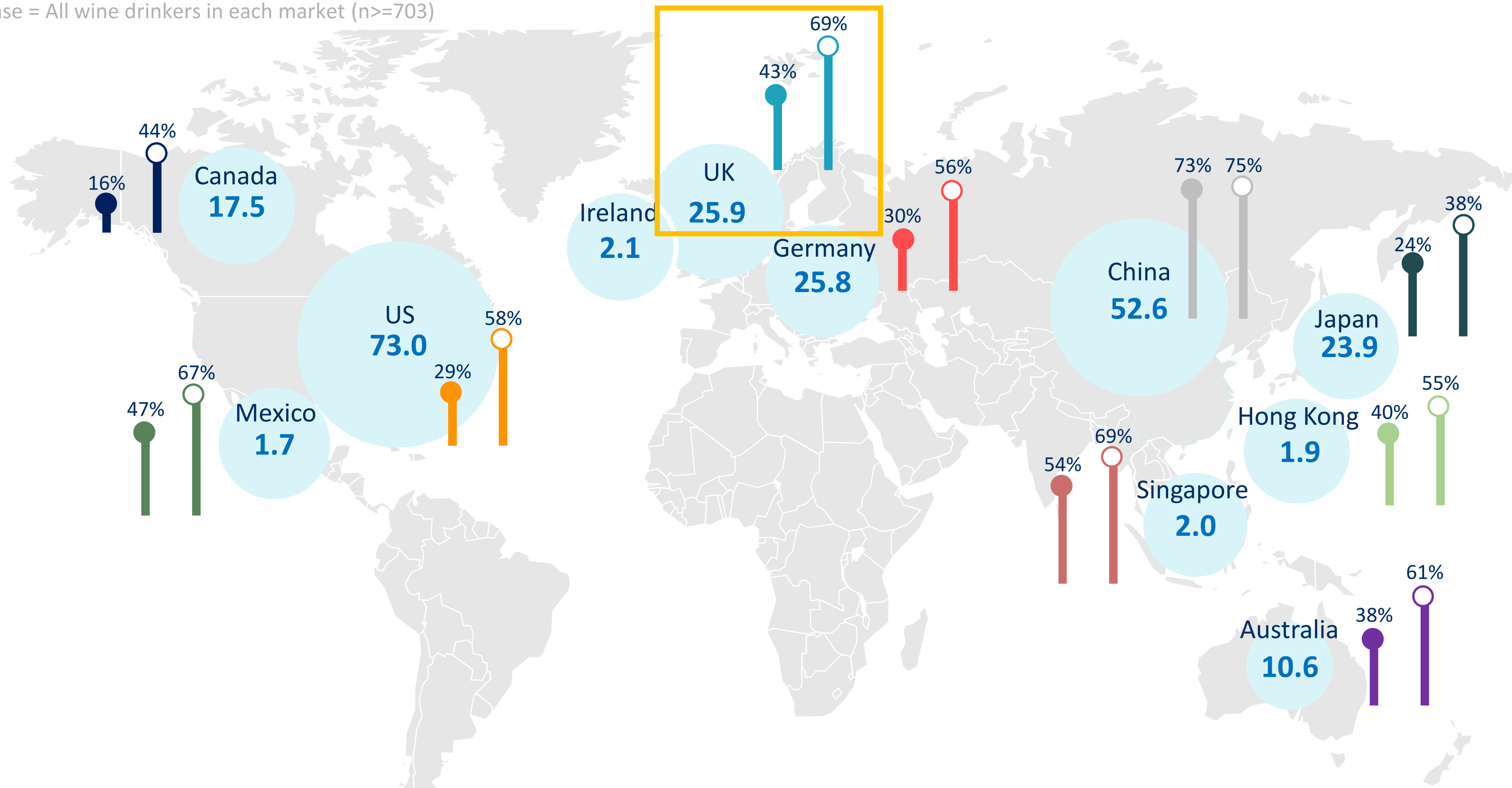
Online users and considerers by market

Users: % who have bought wine from an online channel in the past 6 months
Considerers: % who would consider buying wine from an online channel in the future
Base = All wine drinkers in each market (n>=703)

Size of bubble represents size the wine market in terms of wine drinkers

#: Population of wine drinkers in each market

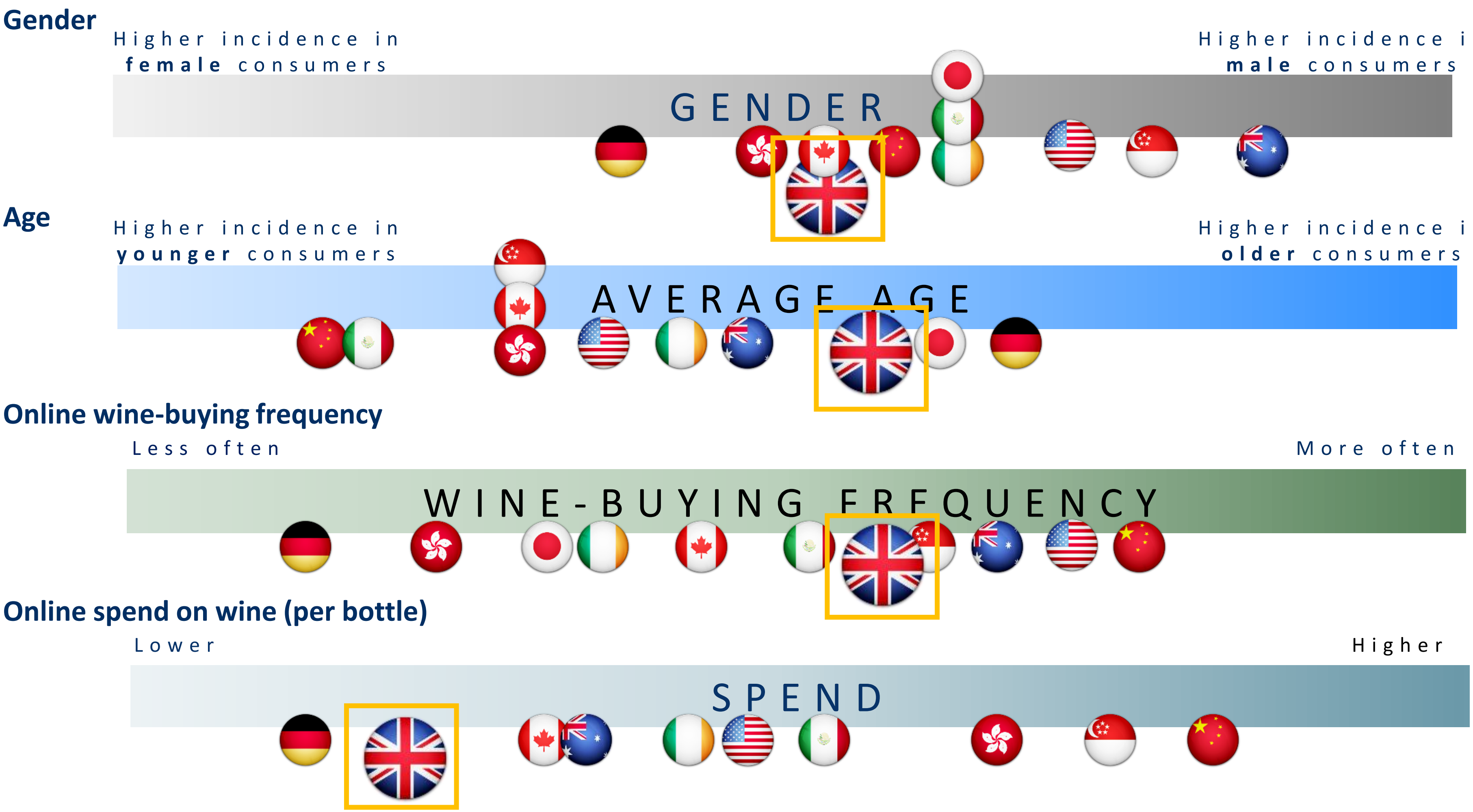
Channel usage
Channel consideration



Note: Ireland usage and consideration data omitted due to methodology changes
Source: Wine Intelligence Vinitrac® Global, October 2020, n>=703 wine drinkers in each market

GLOBAL CONTEXT: ONLINE WINE BUYER PROFILES

The online wine buying population skews male and younger in most markets, however slightly older in the UK; UK is ranking fifth in terms of online wine-buying frequency and is towards the lower end in terms of online spend



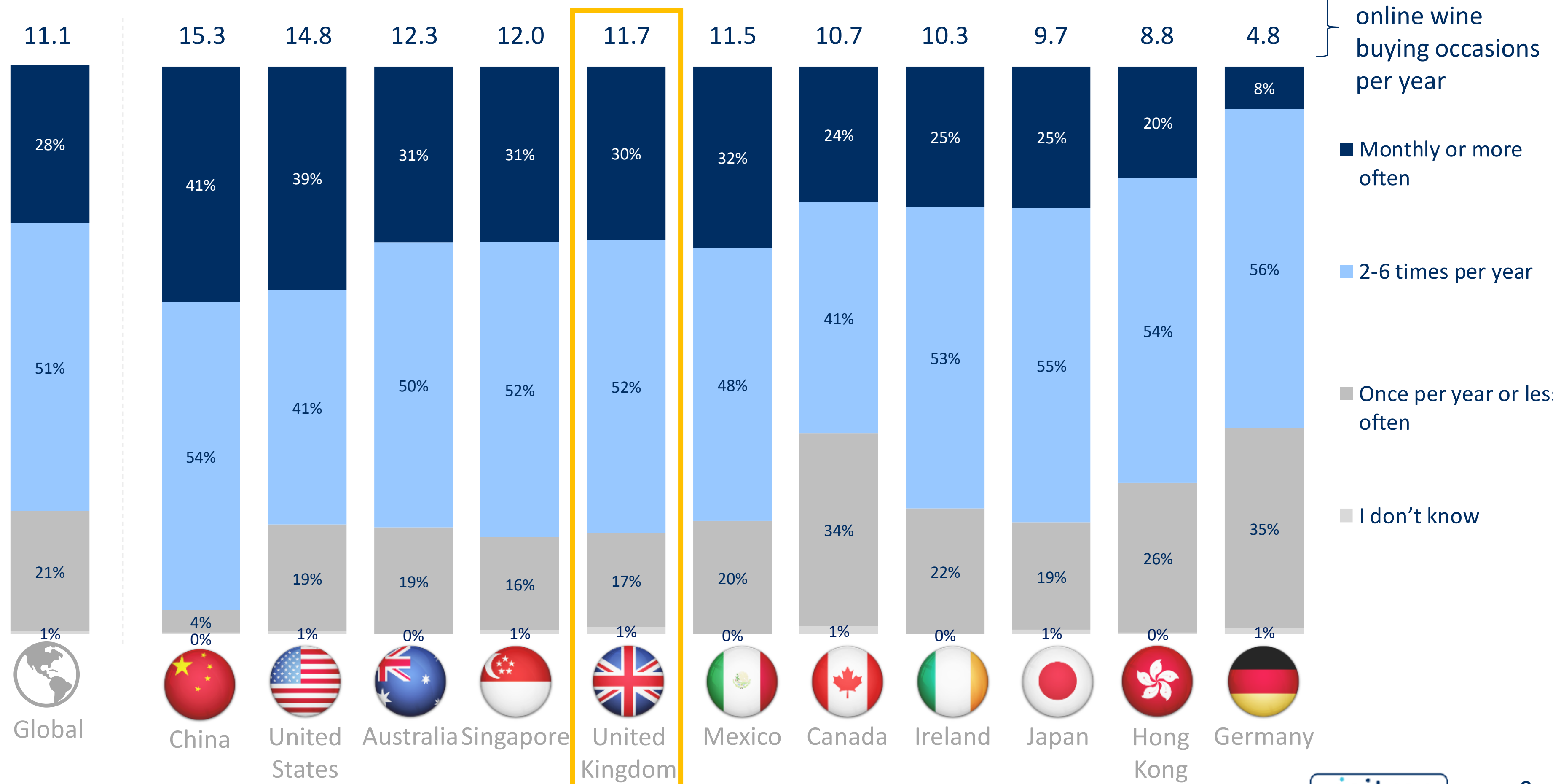
Note: Online spend on wine data not available for Japan
Wine Intelligence Vinitrac® Global, October 2020, n>=703 wine drinkers in each market

GLOBAL CONTEXT: ONLINE WINE-BUYING FREQUENCY

Online wine buyers are purchasing wine through an online source just under once a month on average, with consumers in China and the US buying wine online the most frequently and UK ranking in the middle of the markets tested

Frequency of wine buying using e-commerce

% who buy wine online at the following frequencies
Base = Those who have bought wine online in the past 6 months



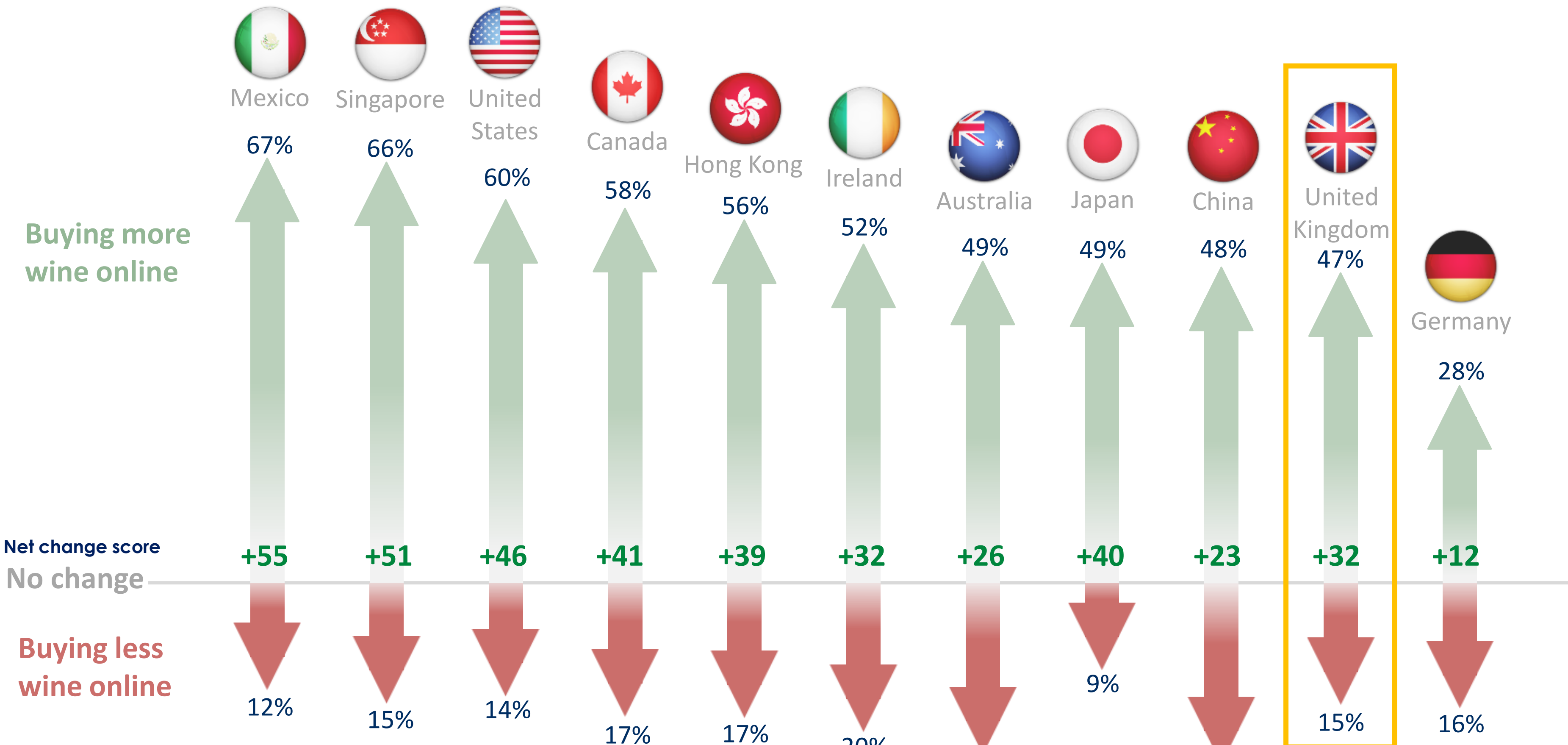
Wine Intelligence Vinitrac® Global, October 2020, n>=703 wine drinkers in each market

GLOBAL CONTEXT: ONLINE WINE-BUYING FREQUENCY CHANGE

There has been a substantial acceleration towards online wine buying during 2020, however a bit less strongly in the UK

Change in wine-buying on the internet

% who selected each statement as the one that best describes how much wine they are buying online now compared to last year
Base = Those who have bought wine online in the past 6 months



Net change score = % consumers who are buying more wine online minus % consumers who buy less wine online compared with a year ago

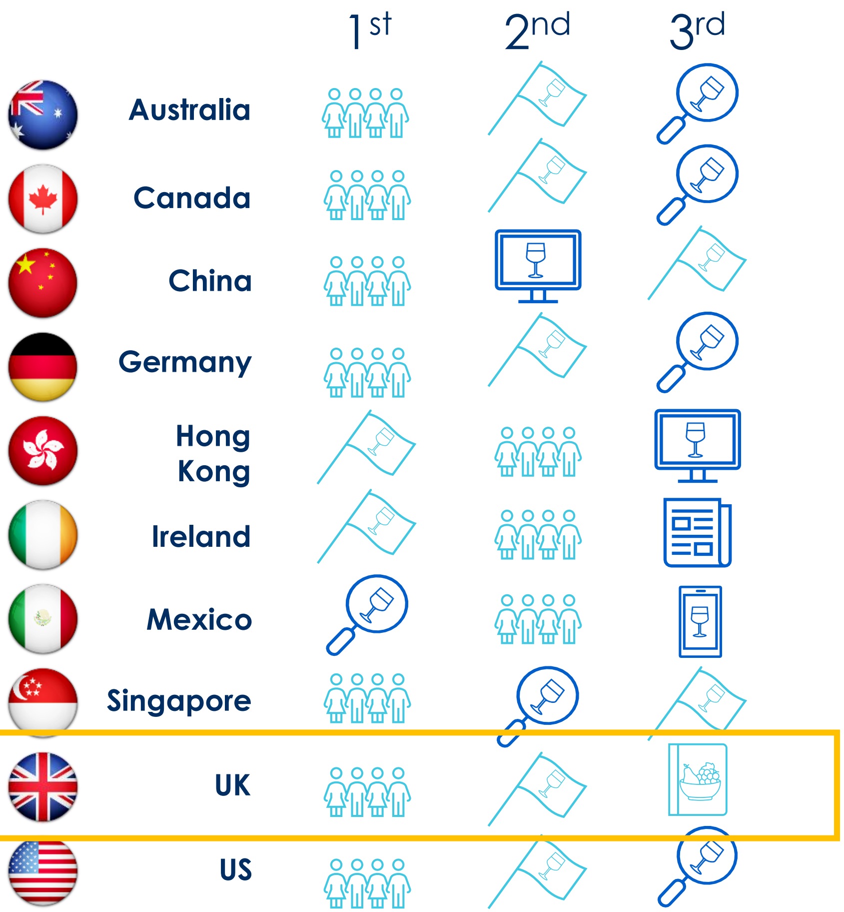
Wine Intelligence Vinitrac® Global, October 2020, n>=703 wine drinkers in each market

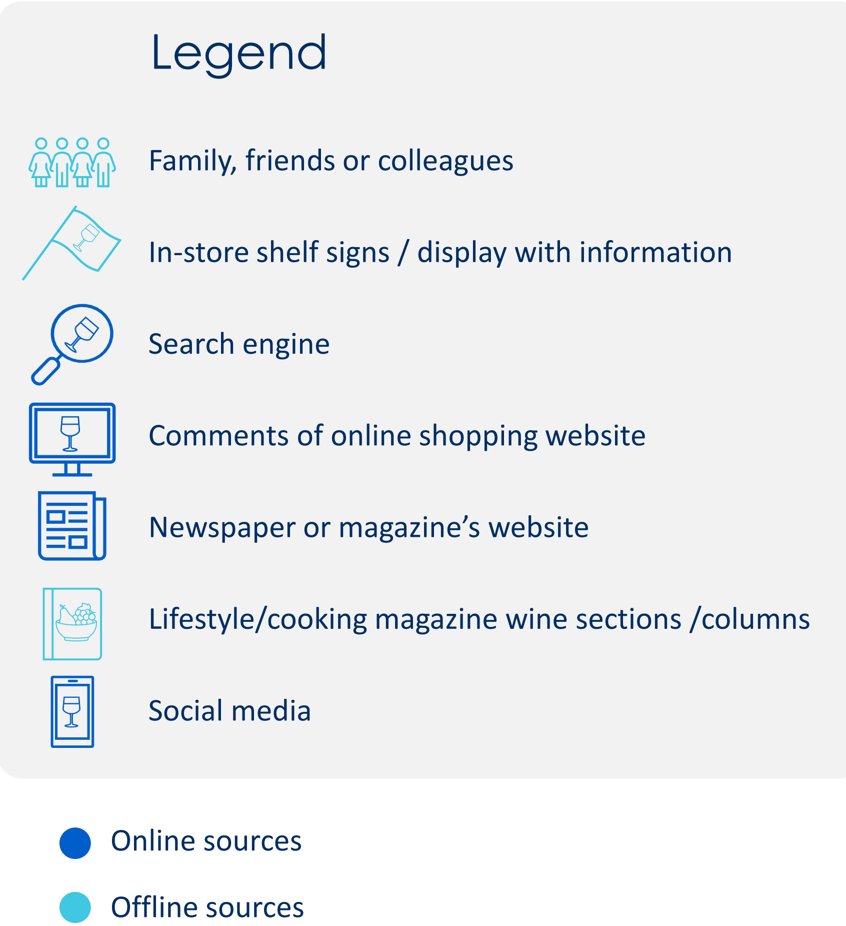
GLOBAL CONTEXT: PURCHASE DRIVERS FOR ONLINE WINE

The most widely used source of information used by online wine buyers for recommendations is word of mouth, followed by cues found inside physical shops and magazines in the UK

Sources of wine information

Sources where respondents look for opinions or recommendations about wine “sometimes” or “often”
Base = Those who have bought wine online in the past 6 months





Wine Intelligence Vinitrac® Global, October 2020, n>=703 wine drinkers in each market

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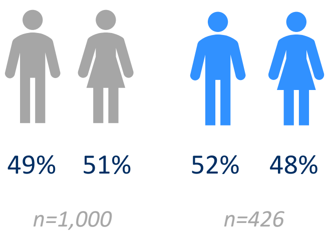
UK: DEMOGRAPHICS OF ONLINE WINE BUYERS

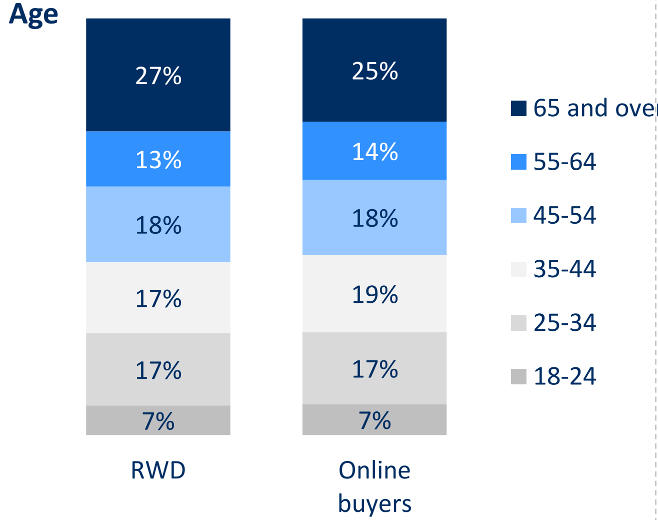
UK online wine buyers are higher earning and more involved than the average UK regular wine drinker; more likely to come from Adventurous Explorers or Generation Treaters Portraits segments

Gender



43% of regular wine drinkers in the UK are online buyers

Age



Annual household income (before tax)

	RWD	Online buyers
Under £29,999	29%	25%
£30,000 - £39,999	18%	17%
£40,000 - £49,999	11%	12%
Over £50,000	29%	36%*
Prefer not to answer	13%	10%

Regions

	RWD	Online buyers
East Anglia + South East	23%	27%
North East + North West + Yorkshire and the Humber	22%	21%
London	14%	15%
East Midlands + West Midlands	14%	13%
South West	11%	9%
Scotland	8%	8%
Wales	5%	5%
Northern Ireland	3%	3%

Portraits

	RWD	Online buyers
Adventurous Explorers	21%	31%*
Generation Treaters	11%	15%*
Mainstream Matures	26%	23%
Social Newbies	17%	17%
Bargain Hunters	13%	8%*
Kitchen Casuals	12%	6%*

* / *: statistically significantly higher / lower than all UK regular wine drinkers at a 95% confidence level
Wine Intelligence Vinitrac® UK, October 2020, (n=1,000) UK regular wine drinkers

UK: PURCHASE CHANNELS USAGE BY GENDER AND AGE

Millennials are more likely to buy wine from a delivery app, but as part of a broader range of channels generally; older drinkers are using a narrower range of channels; all ages and genders using supermarket websites

Channel usage: by gender and age

Usage: % who have bought wine from the following channels in the past 6 months
Base = All UK regular wine drinkers (n=1,000)

Online channels

	UK regular wine drinkers	Gender		Age groups			
		Male	Female	18-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55 and over [Boomers]
n=	*1,000*	*495*	*505*	*71*	*251*	*275*	*403*
In a supermarket	82%	82%	83%	81%	82%	84%	81%
In a discount store	34%	35%	34%	52%	40%	29%	31%
From a supermarket website (online)	28%	26%	30%	32%	29%	30%	26%
In a corner / convenience shop	21%	23%	19%	42%	30%	22%	11%
In a wine shop / off licence chain	20%	24%	17%	25%	27%	25%	12%
From an online retailer (online)	13%	16%	11%	12%	17%	13%	12%
In an independent wine specialist store	12%	16%	9%	16%	13%	12%	11%
From a wine club or membership organisation (online)	11%	13%	9%	9%	10%	10%	13%
From Duty Free	6%	10%	3%	20%	11%	5%	2%
From a winery during a visit	5%	7%	4%	16%	8%	5%	2%
From a delivery app (online)	5%	6%	4%	13%	10%	3%	1%
From a winery's website (online)	5%	4%	5%	9%	7%	3%	4%
From the wine producer's cellar	4%	6%	2%	14%	7%	2%	2%
On cross-channel shopping trips	3%	3%	4%	3%	5%	3%	3%

Red / Blue: statistically significantly higher / lower than all UK regular wine drinkers at a 95% confidence level
Wine Intelligence Vinitrac® UK, October 2020, (n=1,000) UK regular wine drinkers

UK: PURCHASE CHANNELS USAGE BY PORTRAIT SEGMENT

Younger and higher involved segments Generation Treaters are tending to buy wine from a broader variety of channels including online, as well as experimental and higher spending Adventurous Explorers

Channel usage: by Portraits

Usage: % who have bought wine from the following channels in the past 6 months
Base = All UK regular wine drinkers (n=1,000)

Online channels

	UK regular wine drinkers	Portraits					
		Adventurous Explorers	Generation Treaters	Mainstream Matures	Social Newbies	Bargain Hunters	Kitchen Casuals
n=	*1,000*	*208*	*107*	*264*	*171*	*127*	*123*
In a supermarket	82%	82%	79%	83%	76%	85%	88%
In a discount store	34%	38%	44%	36%	39%	26%	16%
From a supermarket website (online)	28%	38%	40%	25%	29%	21%	15%
In a corner / convenience shop	21%	24%	37%	18%	30%	10%	8%
In a wine shop / off licence chain	20%	30%	38%	11%	28%	10%	8%
From an online retailer (online)	13%	24%	27%	9%	14%	2%	5%
In an independent wine specialist store	12%	23%	22%	8%	12%	4%	3%
From a wine club or membership organisation (online)	11%	21%	16%	10%	9%	2%	5%
From Duty Free	6%	5%	23%	3%	9%	2%	3%
From a winery during a visit	5%	5%	15%	3%	10%	2%	1%
From a delivery app (online)	5%	4%	18%	1%	8%	0%	2%
From a winery's website (online)	5%	7%	15%	2%	4%	2%	0%
From the wine producer’s cellar	4%	4%	13%	0%	10%	0%	2%
On cross-channel shopping trips	3%	6%	8%	1%	4%	1%	2%

Red / Blue: statistically significantly higher / lower than all UK regular wine drinkers at a 95% confidence level
Wine Intelligence Vinitrac® UK, October 2020, (n=1,000) UK regular wine drinkers

UK: PURCHASE CHANNEL CONSIDERATION BY GENDER AND AGE

Millennials are more open to using online channels in the future; older consumers are less likely to consider online as a purchase channel, apart from supermarket website

Channel usage consideration: by gender and age

Usage consideration: % who would consider buying wine from the following channels in the future
Base = All UK regular wine drinkers (n=1,000)

Online channels	UK regular wine drinkers	Gender		Age groups			
		Male	Female	18-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55 and over [Boomers]
n=	*1,000*	*495*	*505*	*71*	*251*	*275*	*403*
In a supermarket	84%	84%	83%	68%	82%	85%	87%
In a discount store	55%	53%	57%	63%	58%	51%	55%
From a supermarket website	50%	48%	53%	45%	56%	52%	47%
In a wine shop / off licence chain	49%	50%	47%	41%	51%	53%	45%
From an online retailer	40%	44%	36%	39%	47%	46%	33%
In an independent wine specialist store	38%	40%	37%	29%	43%	45%	32%
From a winery during a visit	37%	38%	35%	36%	43%	38%	32%
In a corner / convenience shop	36%	34%	38%	33%	47%	42%	25%
From Duty Free	29%	33%	26%	27%	37%	31%	24%
From a wine club or membership organisation	29%	30%	28%	21%	30%	35%	26%
From a winery's website	28%	29%	27%	30%	37%	31%	20%
From the wine producer's cellar	26%	31%	21%	29%	31%	30%	19%
On cross-channel shopping trips	23%	26%	21%	25%	25%	25%	21%
From a delivery app	20%	21%	18%	32%	31%	22%	8%

Red / Blue: statistically significantly higher / lower than all UK regular wine drinkers at a 95% confidence level
Wine Intelligence Vinitrac® UK, October 2020, (n=1,000) UK regular wine drinkers

UK: PURCHASE CHANNEL CONSIDERATION BY PORTRAIT

Apart from online-buying segments Adventurous Explorers and Generation Treaters, other segments are less likely to consider online channels in the future

Channel usage consideration: by Portraits

Usage consideration: % who would consider buying wine from the following channels in the future
Base = All UK regular wine drinkers (n=1,000)

Online channels	UK regular wine drinkers	Portraits					
		Adventurous Explorers	Generation Treaters	Mainstream Matures	Social Newbies	Bargain Hunters	Kitchen Casuals
n=	*1,000*	*208*	*107*	*264*	*171*	*127*	*123*
In a supermarket	84%	90%	74%	85%	73%	88%	86%
In a discount store	55%	61%	54%	58%	49%	56%	47%
From a supermarket website	50%	56%	62%	53%	48%	39%	40%
In a wine shop / off licence chain	49%	72%	56%	45%	45%	36%	27%
From an online retailer	40%	54%	55%	39%	43%	19%	24%
In an independent wine specialist store	38%	61%	51%	35%	38%	20%	14%
From a winery during a visit	37%	52%	57%	33%	36%	23%	15%
In a corner / convenience shop	36%	45%	47%	32%	36%	35%	19%
From Duty Free	29%	37%	51%	25%	31%	20%	16%
From a wine club or membership organisation	29%	51%	40%	26%	26%	10%	13%
From a winery's website	28%	42%	46%	22%	34%	10%	10%
From the wine producer's cellar	26%	42%	44%	19%	29%	9%	10%
On cross-channel shopping trips	23%	34%	37%	20%	26%	10%	10%
From a delivery app	20%	23%	47%	15%	22%	11%	5%

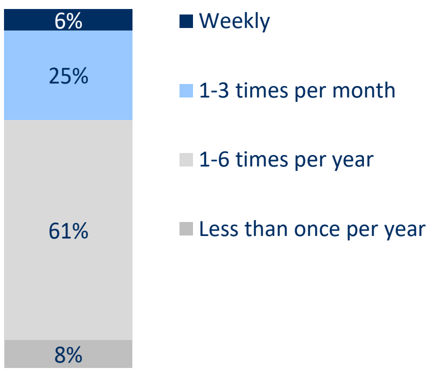
Red / Blue: statistically significantly higher / lower than all UK regular wine drinkers at a 95% confidence level
Wine Intelligence Vinitrac® UK, October 2020, (n=1,000) UK regular wine drinkers

UK: ONLINE WINE BUYING FREQUENCY

Millennials are buying wine most frequently, in line with young and involved Generation Treaters

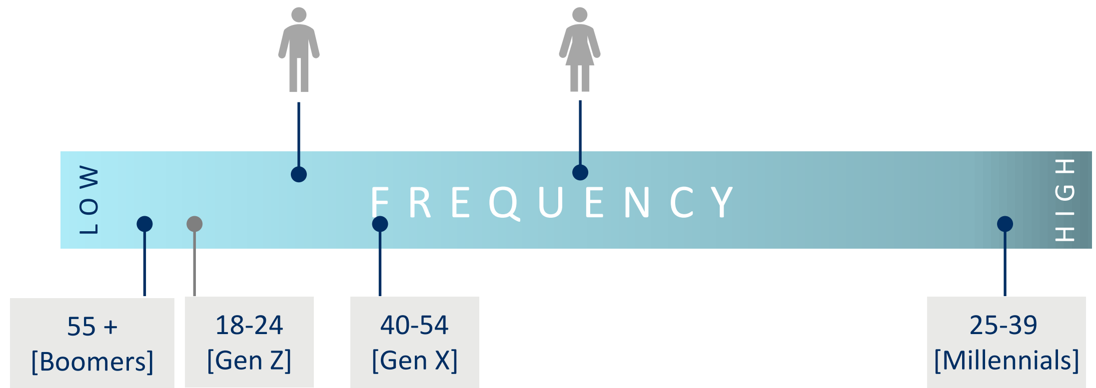
Frequency of online wine buying

% who buy wine online at the following frequencies
Base = All UK regular wine drinkers (n=1,000)



On average
11.7 times per year

Frequency of online wine buying: by gender and age



Frequency of online wine buying: by Portraits

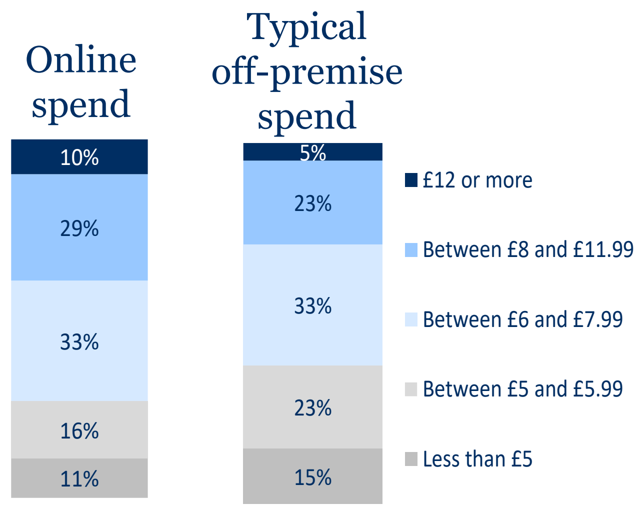
Grey mark: sample size <50

AE: Adventurous Explorers / GT: Generation Treaters / MM: Mainstream Matures / SN: Social Newbies / BH: Bargain Hunters / KC: Kitchen Casuals

Wine Intelligence Vinitrac® UK, October 2020, (n=1,000) UK regular wine drinkers

UK: ONLINE WINE BUYING SPEND

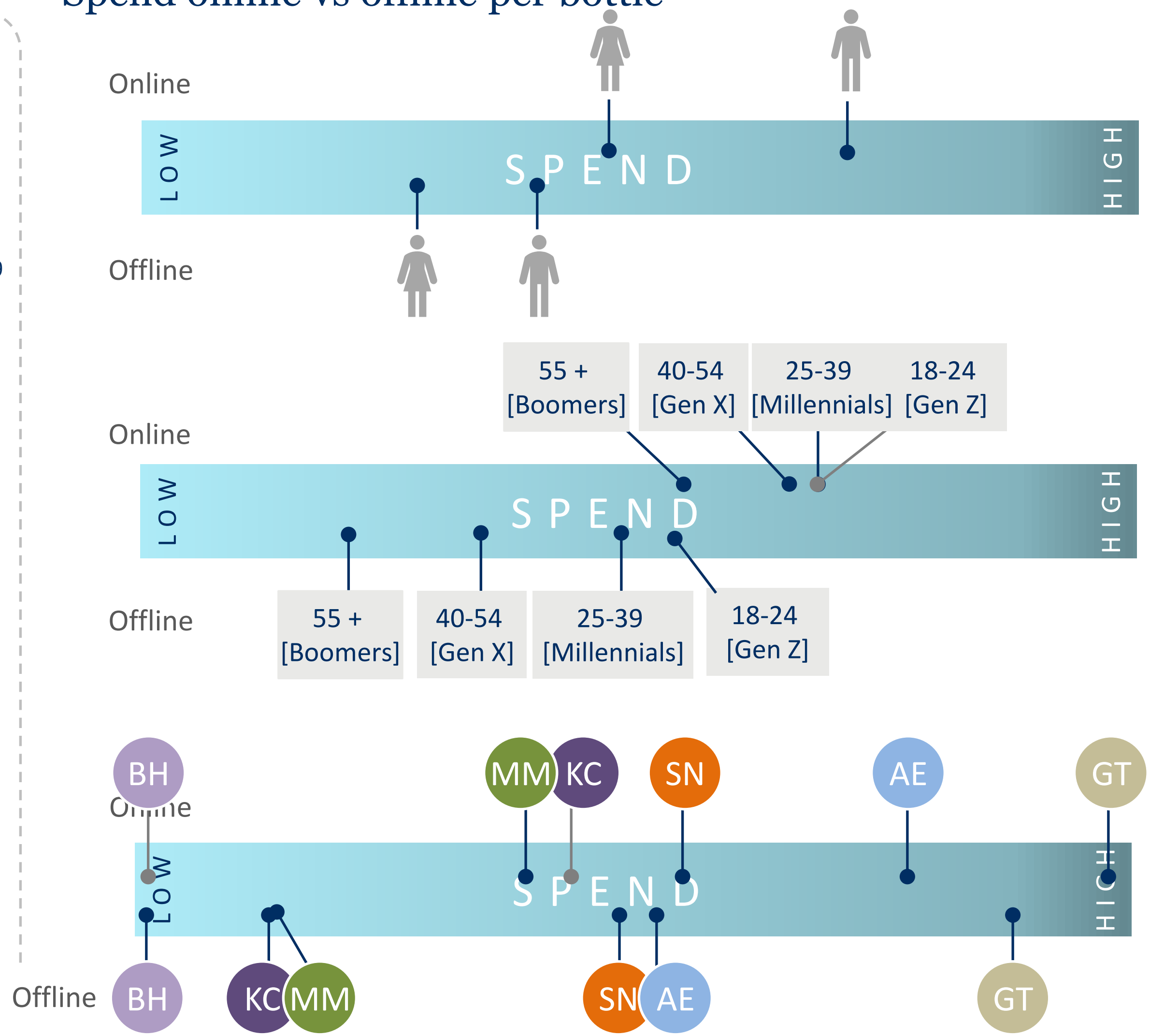
Across all segments online spend on wine is higher than offline spend, especially for males, younger drinkers and more involved segments who have higher overall typical spend as well



Average spend online £8.00 per bottle

Average off-premise spend £7.20 per bottle

Spend online vs offline per bottle



Online spend
% who typically spend the following **on a bottle of wine online**
Base = Those who buy wine online at least once a year

Total off-premise spend
% who typically spend the following **on a bottle of wine in the off-premise**
Base = All UK regular wine drinkers (n=1,000)

Grey mark: sample size <50

AE: Adventurous Explorers / **GT**: Generation Treaters / **MM**: Mainstream Matures / **SN**: Social Newbies / **BH**: Bargain Hunters / **KC**: Kitchen Casuals

Wine Intelligence Vinitrac® UK, October 2020, (n=1,000) UK regular wine drinkers

UK: ONLINE WINE BUYING DRIVERS

Convenience and promotional offers are the main triggers when it comes to buying wine online in the UK

Triggers to online purchasing: Top 5

% who say each of the following are "important" or "very important" to them when buying wine online
Base = Those who buy or would consider buying online in the future

1. Being able to add wines to my normal grocery shopping (66%)
2. A promotional offer (65%)
3. Specific / pre-arranged delivery date and time slot (55%)
4. Exclusive / limited offer (45%)
5. A voucher to spend online (44%)

Exclusive online availability (58% vs 34%) and tailor-made offers online (51% vs 30%) are especially important to Generation Treaters

More Gen Z wine drinkers (39% vs 20%) and Millennials (30% vs 20%) are finding free accessory (eg corkscrew) to be an important trigger when buying wine online

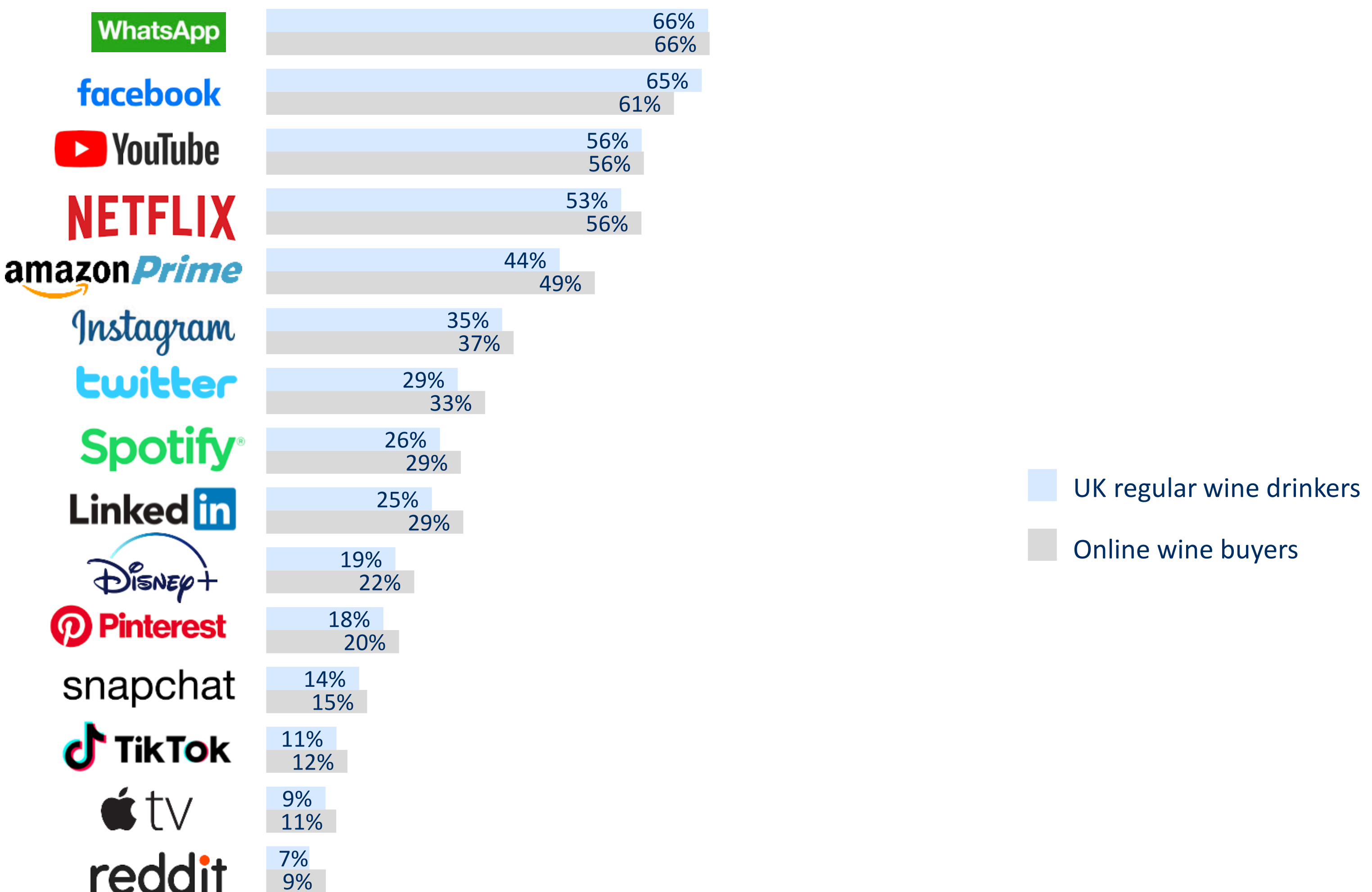
Grey % of UK regular wine drinkers
Wine Intelligence Vinitrac® UK, October 2020, (n=1,000) UK regular wine drinkers

UK: ONLINE MEDIA PLATFORM USAGE

Regular wine drinkers and online wine buyers are using online platforms to the same extent

Online platform usage

% who currently use each of the following platforms / websites



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

Wine Intelligence Vinitrac® UK, October 2020, (n=1,000) UK regular wine drinkers

UK: SOURCES OF INFORMATION

Gen Z and Millennial wine drinkers are more likely to use online sources to look for information for wine, whilst older wine drinkers are using a narrow range of sources

Sources of information: by gender and age

% look for opinions or recommendations about wine from the following sources "sometimes" or "often"
Base = All UK regular wine drinkers (n=1,000)

Online sources

	UK regular wine drinkers	Gender		Age groups			
		Male	Female	18-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55 and over [Boomers]
n=	*1,000*	*495*	*505*	*71*	*251*	*275*	*403*
Friends, family or colleagues	71%	68%	74%	80%	81%	69%	64%
In-store shelf signs / display with information about wine	68%	67%	70%	69%	69%	68%	69%
Search engine	41%	46%	37%	66%	56%	44%	26%
Lifestyle / cooking magazine wine sections or columns	41%	39%	43%	55%	48%	40%	35%
Newspaper or magazine's website	37%	42%	32%	37%	40%	38%	35%
Comments of online shopping website	36%	36%	37%	58%	53%	37%	22%
Social media	27%	28%	26%	62%	47%	26%	9%
Wine guide / book	27%	25%	23%	44%	40%	22%	12%
Information online from a wine blogger / wine expert	26%	28%	24%	47%	42%	23%	14%
A wine producer or wine brand's website or Facebook	25%	31%	20%	46%	38%	26%	13%
Wine magazine	23%	29%	17%	41%	33%	23%	14%
A wine app	19%	21%	16%	34%	32%	18%	8%

Red / Blue: statistically significantly higher / lower than all UK regular wine drinkers at a 95% confidence level
Wine Intelligence Vinitrac® UK, October 2020, (n=1,000) UK regular wine drinkers

UK: SOURCES OF INFORMATION

Note the extent to which Generation Treaters and Social Newbies - segments with less experience and knowledge - are using a wide variety of sources to look for information on wine

Sources of information: by Portraits

% look for opinions or recommendations about wine from the following sources "sometimes" or "often"
Base = All UK regular wine drinkers (n=1,000)

Online sources

	UK regular wine drinkers	Portraits					
		Adventurous Explorers	Generation Treaters	Mainstream Matures	Social Newbies	Bargain Hunters	Kitchen Casuals
n=	*1,000*	*208*	*107*	*264*	*171*	*127*	*123*
Friends, family or colleagues	71%	74%	84%	69%	81%	62%	54%
In-store shelf signs / display with information about wine	68%	78%	77%	69%	68%	52%	60%
Search engine	41%	49%	61%	32%	63%	20%	23%
Lifestyle / cooking magazine wine sections or columns	41%	58%	62%	35%	48%	17%	23%
Newspaper or magazine's website	37%	54%	49%	33%	42%	13%	25%
Comments of online shopping website	36%	44%	65%	29%	53%	13%	17%
Social media	27%	26%	62%	17%	46%	7%	15%
Wine guide / book	27%	24%	47%	18%	34%	12%	16%
Information online from a wine blogger / wine expert	26%	30%	57%	17%	41%	5%	13%
A wine producer or wine brand's website or Facebook	25%	31%	51%	16%	40%	5%	14%
Wine magazine	23%	33%	52%	14%	30%	3%	12%
A wine app	19%	21%	41%	10%	35%	3%	7%

Red / Blue: statistically significantly higher / lower than all UK regular wine drinkers at a 95% confidence level
Wine Intelligence Vinitrac® UK, October 2020, (n=1,000) UK regular wine drinkers

UK: SOURCES OF INFORMATION

Female wine drinkers are more likely to trust peers when it comes to information about wines, whilst older wine drinkers are relying more on wine guide books and magazines

Trust of sources of information: by gender and age

% who say they trust the advice, opinions or recommendations about wine from the following sources
Base = Those who use each source for wine information "sometimes" or "often"

Online sources	UK regular wine drinkers	Gender		Age groups			
		Male	Female	18-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55 and over [Boomers]
Friends, family or colleagues	75%	68%	81%	66%	72%	75%	80%
In-store shelf signs / display with information about wine	47%	43%	52%	42%	37%	53%	50%
Lifestyle / cooking magazine wine sections or columns	45%	40%	50%	35%	38%	44%	55%
Wine guide / book	45%	42%	49%	32%	31%	48%	60%
Wine magazine	43%	42%	43%	30%	40%	38%	58%
Information online from a wine blogger / wine expert	40%	37%	45%	46%	36%	51%	33%
Search engine	36%	36%	37%	42%	35%	44%	27%
Newspaper or magazine's website	36%	33%	39%	25%	27%	37%	42%
Comments of online shopping website	33%	26%	39%	39%	25%	35%	39%
A wine producer or wine brand's website or Facebook	31%	32%	29%	38%	32%	30%	28%
A wine app	30%	21%	42%	50%	26%	24%	35%
Social media	29%	30%	28%	36%	36%	23%	13%

Grey shading = sample size <50
Red / Blue: statistically significantly higher / lower than all UK regular wine drinkers at a 95% confidence level
Wine Intelligence Vinitrac® UK, October 2020, (n=1,000) UK regular wine drinkers

UK: SOURCES OF INFORMATION

Few differences amongst Portraits segments in terms of trust of sources of information

Trust of sources of information: by gender and age

% who say they trust the advice, opinions or recommendations about wine from the following sources
Base = Those who use each source for wine information "sometimes" or "often"

Online sources

		Portraits					
	UK regular wine drinkers	Adventurous Explorers	Generation Treaters	Mainstream Matures	Social Newbies	Bargain Hunters	Kitchen Casuals
Friends, family or colleagues	75%	75%	69%	82%	68%	88%	64%
In-store shelf signs / display with information about wine	47%	51%	39%	55%	33%	54%	45%
Lifestyle / cooking magazine wine sections or columns	45%	53%	48%	57%	32%	23%	26%
Wine guide / book	45%	61%	34%	48%	32%	32%	29%
Wine magazine	43%	51%	51%	43%	29%	23%	22%
Information online from a wine blogger / wine expert	40%	46%	49%	44%	28%	51%	29%
Search engine	36%	37%	40%	29%	42%	38%	27%
Newspaper or magazine's website	36%	44%	30%	46%	19%	29%	29%
Comments of online shopping website	33%	40%	26%	34%	29%	47%	23%
A wine producer or wine brand's website or Facebook	31%	34%	44%	23%	24%	17%	32%
A wine app	30%	30%	31%	37%	29%	0%	23%
Social media	29%	20%	37%	20%	32%	0%	50%

Grey shading = sample size <50
Red / Blue: statistically significantly higher / lower than all UK regular wine drinkers at a 95% confidence level
Wine Intelligence Vinitrac® UK, October 2020, (n=1,000) UK regular wine drinkers

CONTENTS

UK PORTRAITS

The UK wine drinking population splits into 6 segments based on the relationship with the category

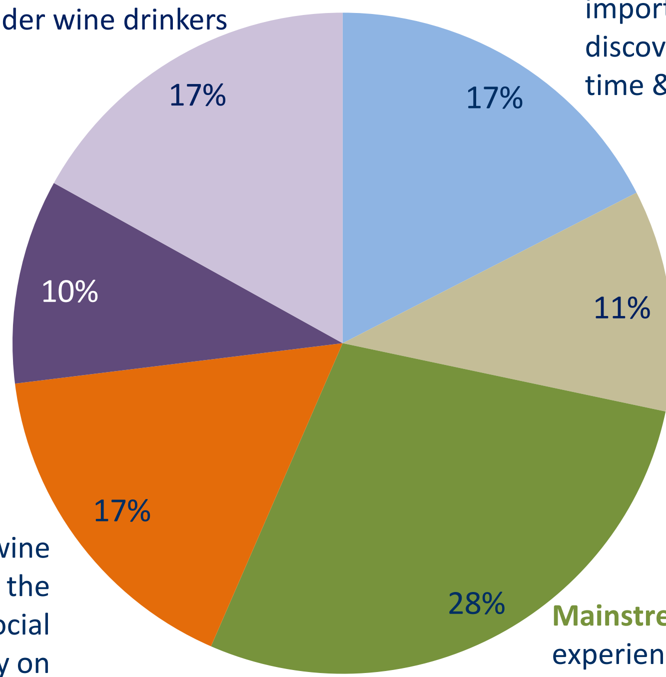
wine intelligence

% Share of UK regular wine drinkers by Portraits segment 2018

Bargain Hunters The least frequent, lowest spending and least confident segment of older wine drinkers

Adventurous Explorers: Mid-aged and older confident wine drinkers for whom wine is an important part of their lifestyle, who enjoy discovering new wine and are willing to invest time & money in the category

Kitchen Casuals: One of the older segments of wine drinkers, who drink wine less frequently, are strongly driven by promotions and drink from a narrow repertoire near exclusively at home only



Generation Treaters: Younger, very frequent and higher spending, confident wine drinkers, whose knowledge of the range of wines available continues to develop

Social Newbies: Younger wine drinkers, still finding their way in the category, who enjoy wine in social settings, relying heavily on recommendations

Mainstream Matures: As the oldest & most experienced segment of wine drinkers, they regularly enjoy familiar wine and are strongly value driven, feeling confident about which wines they like and sticking to what they know

Wine Intelligence, Vinitrac® UK January and March 2018, UK regular wine drinkers (n=5,001)
Wine Intelligence, qualitative research methodology (focus groups and interviews)

METHODOLOGY

Vinitrac® UK

- The data was collected in the UK in October 2020
- Data was gathered via Wine Intelligence's Vinitrac® online survey
- Respondents were screened to ensure that they were at least 18 years old; drank red, white or rosé wine at least once a month; and bought wine in the off-trade or in the on-trade
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The data is representative of UK regular wine drinkers in terms of gender, age, annual pre-tax household income and region
- The distribution of the sample is shown in the table:

		Oct-20
	n=	1,000
Gender	Male	49%
	Female	51%
	Total	*100%*
Age	18-24	7%
	25-34	17%
	35-44	17%
	45-54	18%
	55-64	13%
	65+	27%
	Total	*100%*
Annual household income before taxes	Under £29,999	29%
	£30,000 - £39,999	18%
	£40,000 - £49,999	11%
	Over £50,000	29%
	Prefer not to answer	13%
	Total	*100%*
Region	North East + North West + Yorkshire and the Humber	22%
	East Midlands + West Midlands	14%
	East Anglia + South East	23%
	London	14%
	South West	11%
	Wales	5%
	Scotland	8%
	Northern Ireland	3%
	Total	*100%*

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

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, [XX] 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

Connecting wine businesses with knowledge and insights globally

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