WINE INTELLIGENCE

WINE E-COMMERCE IN THE US MARKET

MARCH 2021

Wine Intelligence Ltd: 109 Maltings Place, 169 Tower Bridge Road, London SE1 3LJ Tel: 020 8194 0090. E-mail: info@wineintelligence.com.
Registered in England as a limited company number: 4375306

CONTENTS

CONTENTS

GLOBAL 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

CONTENTS

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 North America, where considerers outnumber users by two to one

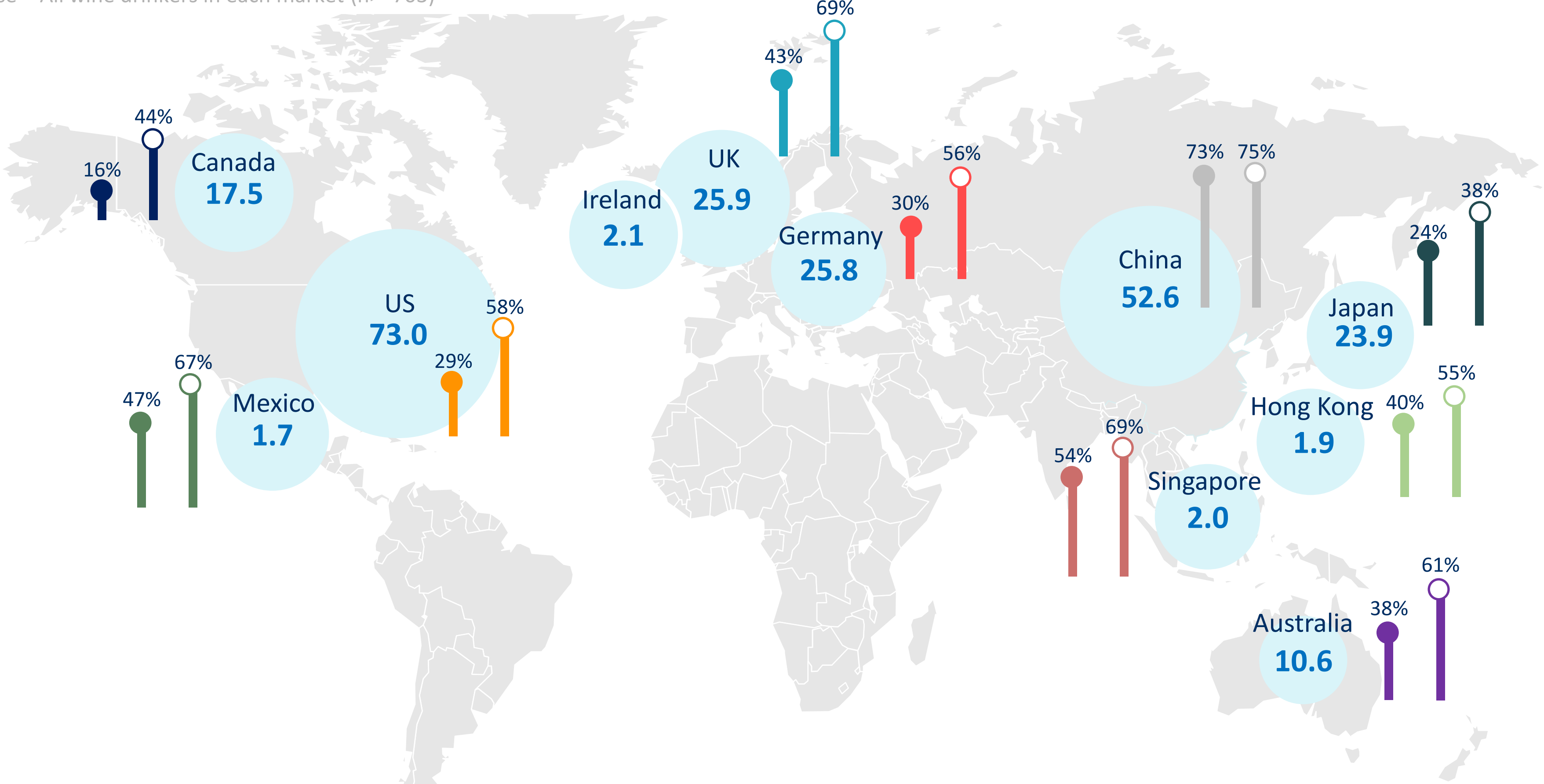
Online users and considerers by market

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

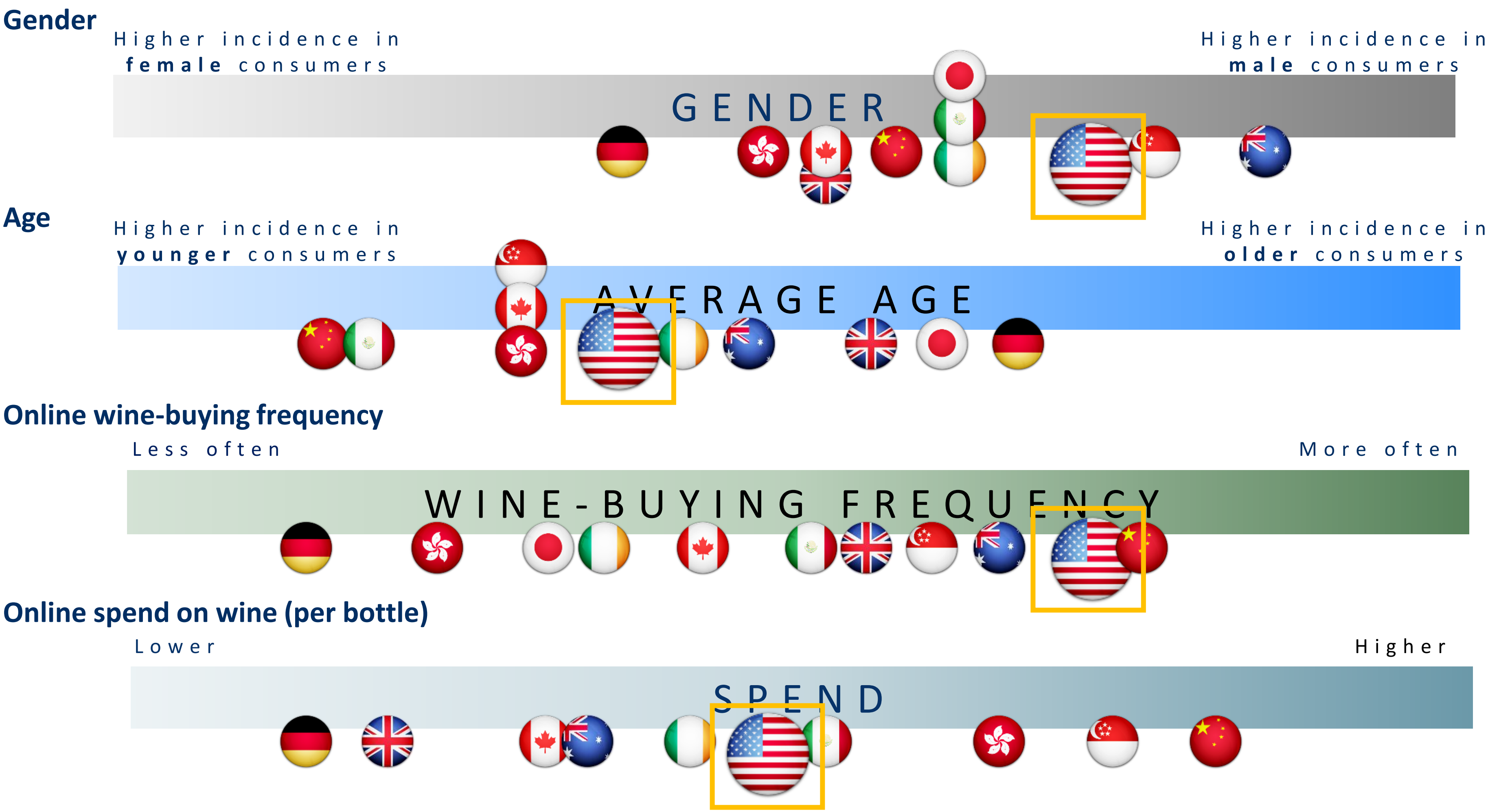
Channel usage
Channel consideration



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

ONLINE WINE BUYER DEMOGRAPHICS, FREQUENCY AND SPEND

The online wine buying population skews male and younger in most markets including the US; US is ranking second in terms of online wine-buying frequency and in the midst of the markets tested in terms of online spend



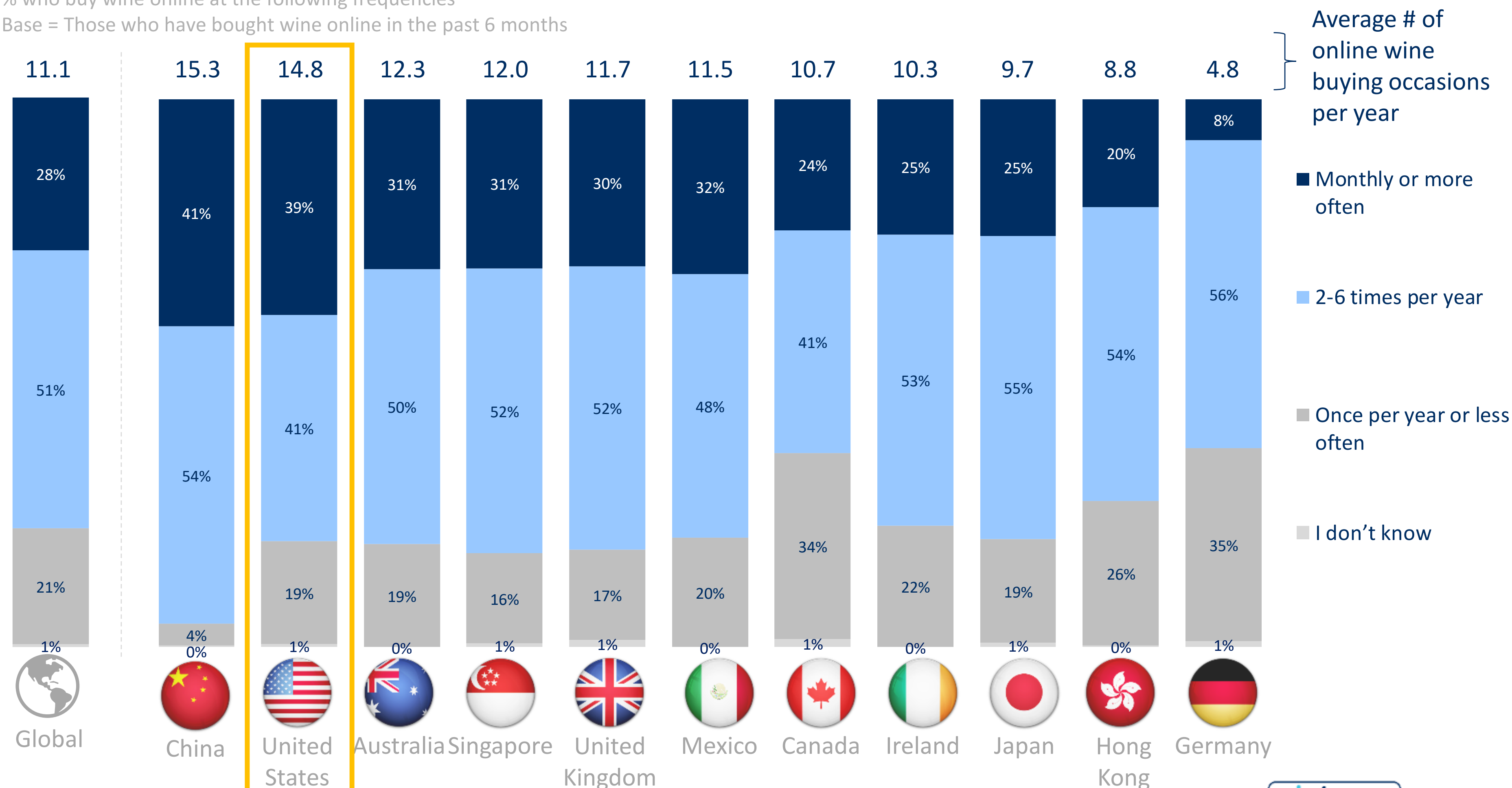
Note: Online spend on wine data not available for Japan
Wine Intelligence Vinitrac® Global, October 2020, n>=703 wine drinkers in each market

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

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



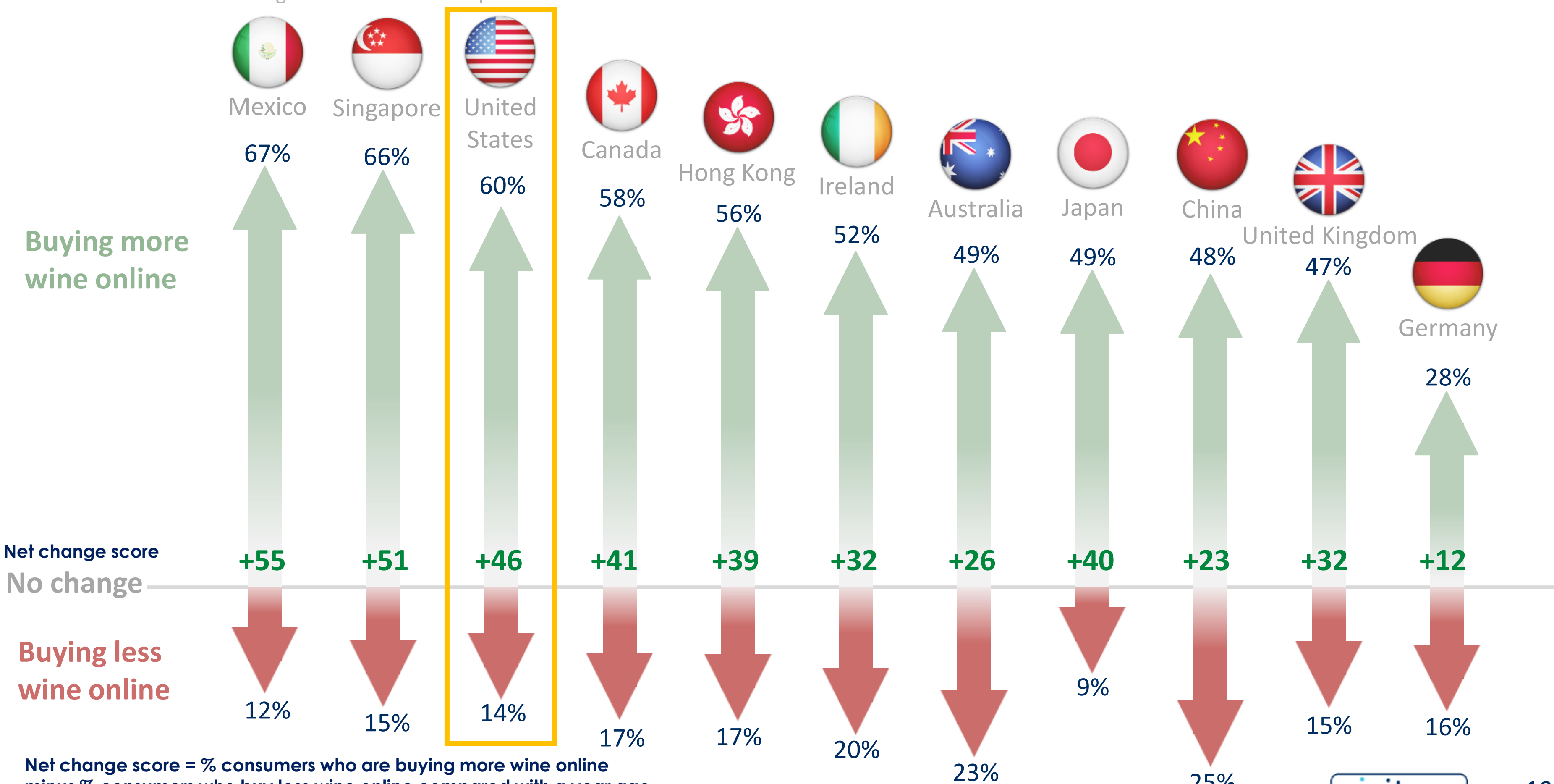
Wine Intelligence Vinitrac® Global, October 2020, n>=703 wine drinkers in each market

ONLINE WINE-BUYING FREQUENCY CHANGE

There has been a substantial acceleration towards online wine buying during 2020, especially in the US, where almost 2/3rds of consumers buying wine online more often

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

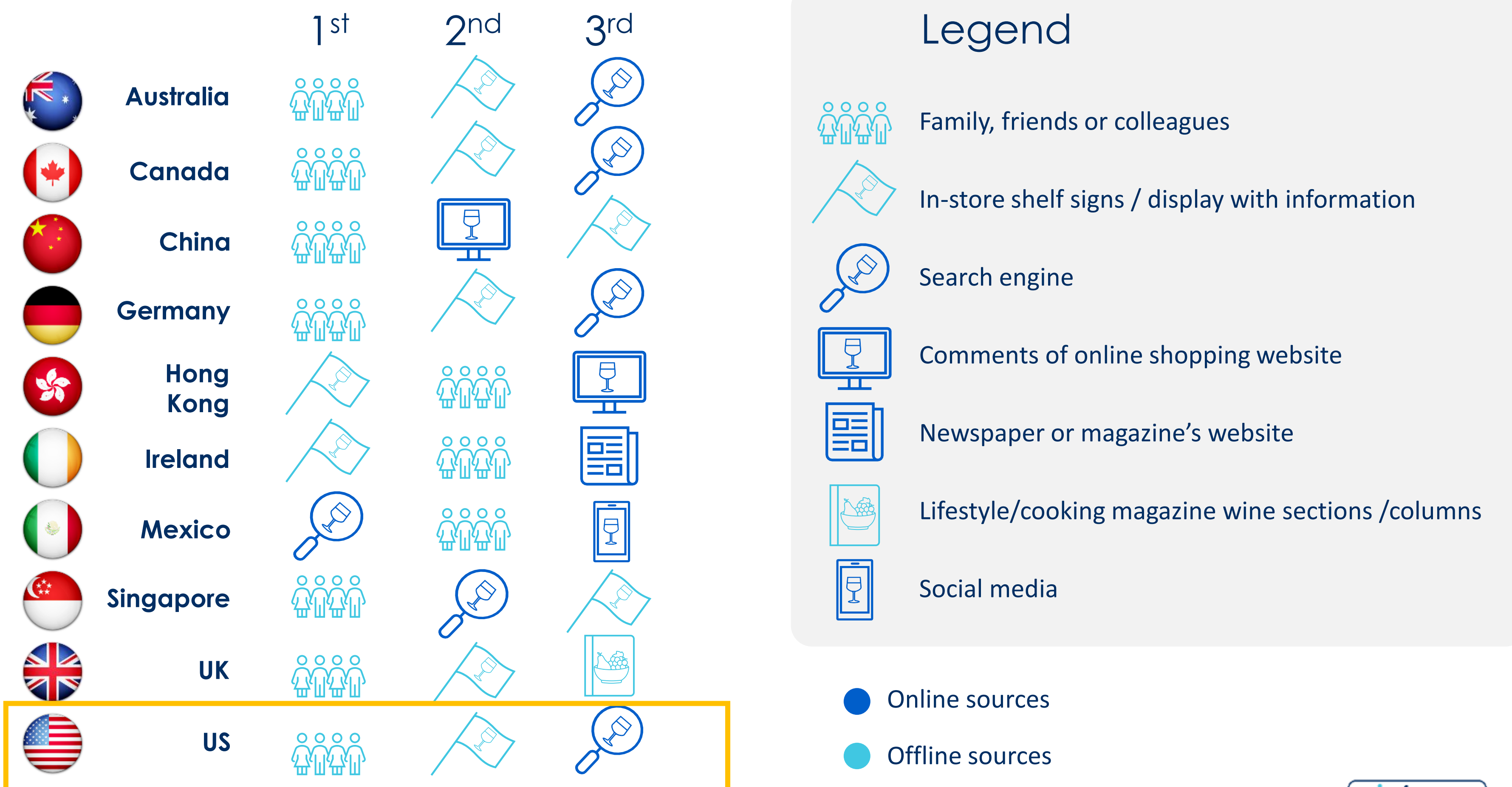
Wine Intelligence Vinitrac® Global, October 2020, n>=703 wine drinkers in each market

WINE PURCHASE DRIVERS AMONGST ONLINE WINE BUYERS

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 search engines in the US market

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



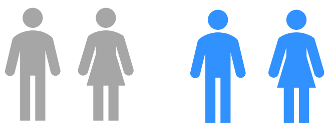
Wine Intelligence Vinitrac® Global, October 2020, n>=703 wine drinkers in each market

CONTENTS

US: DEMOGRAPHICS

Online wine buyers in the US are more likely to be Engaged Explorers or Generation Treaters, with demographic skews towards male, younger and wealthier

Gender

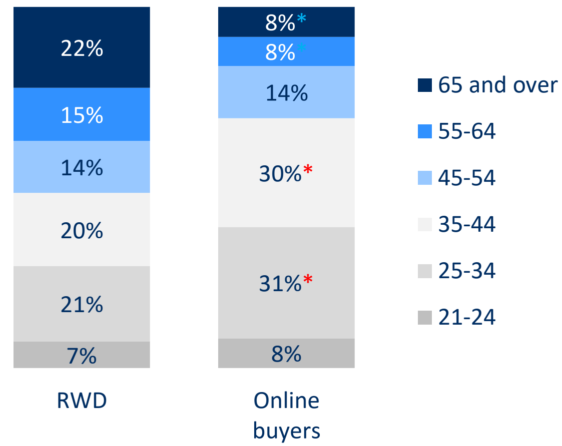


51% 49% | 62%* 38%*

n=2,000 | *n=584*

29% of regular wine drinkers in the US are online buyers

Age



Annual household income (before tax)

	RWD	Online buyers
Under $39,999	25%	17%*
$40,000-$99,999	43%	44%
$100,000+	28%	37%*
Prefer not to answer	4%	2%*

Regions

	RWD	Online buyers
New England	5%	4%
Middle Atlantic	15%	14%
East North Central	11%	10%
West North Central	7%	7%
South Atlantic	21%	21%
East South Central	4%	3%
West South Central	11%	12%
Mountain	7%	8%
Pacific	19%	21%

Portraits

	RWD	Online buyers
Engaged Explorers	14%	26%*
Generation Treaters	11%	27%*
Mainstream Suburbans	22%	15%*
Social Newbies	15%	17%
Senior Bargain Hunters	21%	8%*
Kitchen Casuals	16%	7%*

Note: Portraits data from the Wine Intelligence US Portraits 2021 report. Click here for more information

* / *: statistically significantly higher / lower than all US regular wine drinkers at a 95% confidence level
Wine Intelligence Vinitrac® US, October 2020, (n=2,000) US regular wine drinkers

US: ONLINE BUYING BEHAVIOUR

Millennials are more likely to use online channels to buy wine, but as part of a broader range of channels generally; older drinkers are using a narrower range of channels generally, led by supermarket and liquor store

Channel usage: by gender and age

Usage: % who have bought wine from the following channels in the past 6 months
Base = All US regular wine drinkers (n=2,000)

Online channels

	US regular wine drinkers	Gender		Age groups			
		Male	Female	21-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55 and over [Boomers]
n=	*2,000*	1,026	974	148	602	508	742
In a liquor store	51%	49%	53%	47%	59%	51%	45%
In a supermarket	48%	46%	51%	38%	50%	51%	46%
In a super store	34%	33%	36%	48%	48%	38%	18%
In a club store	28%	32%	25%	28%	33%	32%	22%
In a wine shop	24%	27%	21%	27%	32%	26%	15%
From a winery during the visit	13%	15%	11%	14%	17%	11%	10%
In a convenience store	12%	14%	11%	23%	21%	15%	2%
In a state-controlled liquor store	12%	12%	12%	11%	18%	11%	9%
From an online retailer	11%	15%	7%	10%	19%	15%	3%
From a wine club or membership organization	11%	14%	7%	15%	16%	11%	5%
In a drug store	11%	11%	10%	18%	15%	11%	6%
From a supermarket website	10%	12%	7%	8%	17%	12%	3%
From a winery's website	10%	12%	7%	10%	15%	12%	4%
From a delivery app	8%	12%	5%	12%	17%	9%	1%
From Duty Free	5%	7%	3%	5%	10%	5%	1%

Red / Blue: statistically significantly higher / lower than all US regular wine drinkers at a 95% confidence level
Wine Intelligence Vinitrac® US, October 2020, (n=2,000) US regular wine drinkers

US: ONLINE BUYING BEHAVIOUR

Younger and higher involved segments Engaged Explorers and Generation Treaters are tending to buy wine from a broader variety of channels including online

Channel usage: by Portraits

Usage: % who have bought wine from the following channels in the past 6 months
Base = All US regular wine drinkers (n=2,000)

Online channels

	US regular wine drinkers	Portraits					
		Engaged Explorers	Generation Treaters	Mainstream Suburbans	Social Newbies	Senior Bargain Hunters	Kitchen Casuals
n=	*2,000*	*289*	*223*	*437*	*309*	*418*	*325*
In a liquor store	51%	62%	46%	53%	52%	48%	42%
In a supermarket	48%	50%	47%	55%	42%	50%	42%
In a super store	34%	41%	48%	40%	31%	25%	28%
In a club store	28%	46%	41%	29%	28%	18%	16%
In a wine shop	24%	43%	41%	24%	24%	13%	9%
From a winery during the visit	13%	22%	20%	12%	14%	7%	7%
In a convenience store	12%	13%	29%	12%	13%	7%	6%
In a state-controlled liquor store	12%	18%	21%	12%	11%	9%	7%
From an online retailer	11%	24%	32%	6%	11%	2%	4%
From a wine club or membership organization	11%	21%	31%	7%	11%	2%	5%
In a drug store	11%	12%	22%	11%	9%	8%	6%
From a supermarket website	10%	16%	25%	5%	12%	5%	4%
From a winery's website	10%	24%	22%	6%	9%	2%	4%
From a delivery app	8%	15%	26%	4%	10%	2%	2%
From Duty Free	5%	8%	20%	2%	4%	1%	1%

Red / Blue: statistically significantly higher / lower than all US regular wine drinkers at a 95% confidence level
Wine Intelligence Vinitrac® US, October 2020, (n=2,000) US regular wine drinkers

US: ONLINE BUYING BEHAVIOUR

Millennials and Gen X are more open to using online channels in the future; older consumers are less likely to consider online as a purchase channel

Channel usage consideration: by gender and age

Usage consideration: % who would consider buying wine from the following channels in the future
Base = All US regular wine drinkers (n=2,000)

Online channels	US regular wine drinkers	Gender		Age groups			
		Male	Female	21-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55 and over [Boomers]
n=	*2,000*	1,026	974	148	602	508	742
In a liquor store	60%	57%	64%	48%	58%	63%	63%
In a supermarket	57%	55%	58%	37%	55%	61%	59%
In a wine shop	52%	52%	52%	49%	51%	57%	49%
In a super store	50%	45%	55%	45%	60%	55%	39%
In a club store	46%	47%	46%	34%	50%	48%	44%
From a winery during the visit	45%	42%	48%	29%	46%	48%	44%
From a winery's website	34%	33%	35%	22%	42%	43%	24%
From an online retailer	32%	32%	31%	29%	40%	43%	18%
From a wine club or membership organization	31%	31%	30%	25%	42%	40%	17%
In a state-controlled liquor store	27%	26%	28%	22%	35%	29%	20%
From a supermarket website	26%	26%	26%	24%	37%	35%	11%
From a delivery app	25%	26%	25%	27%	39%	35%	7%
In a drug store	23%	21%	26%	17%	29%	30%	16%
In a convenience store	23%	21%	25%	22%	35%	31%	8%
From Duty Free	19%	20%	18%	11%	28%	22%	11%

Red / Blue: statistically significantly higher / lower than all US regular wine drinkers at a 95% confidence level
Wine Intelligence Vinitrac® US, October 2020, (n=2,000) US regular wine drinkers

US: ONLINE BUYING BEHAVIOUR

Apart from online-buying segments Engaged Explorers and Generation Treaters, Mainstream Suburbans also show high consideration rates for online channels

Channel usage consideration: by Portraits

Usage consideration: % who would consider buying wine from the following channels in the future
Base = All US regular wine drinkers (n=2,000)

Online channels	US regular wine drinkers	Portraits					
		Engaged Explorers	Generation Treaters	Mainstream Suburbans	Social Newbies	Senior Bargain Hunters	Kitchen Casuals
n=	*2,000*	*289*	*223*	*437*	*309*	*418*	*325*
In a liquor store	60%	69%	46%	66%	53%	62%	59%
In a supermarket	57%	65%	45%	67%	46%	58%	52%
In a wine shop	52%	73%	48%	62%	46%	45%	35%
In a super store	50%	61%	48%	57%	38%	48%	45%
In a club store	46%	63%	47%	54%	38%	44%	33%
From a winery during the visit	45%	63%	38%	57%	37%	41%	29%
From a winery's website	34%	64%	37%	41%	27%	19%	23%
From an online retailer	32%	60%	31%	39%	26%	18%	21%
From a wine club or membership organization	31%	58%	40%	36%	26%	17%	15%
In a state-controlled liquor store	27%	39%	30%	29%	24%	23%	20%
From a supermarket website	26%	44%	39%	28%	23%	15%	15%
From a delivery app	25%	46%	38%	26%	25%	15%	11%
In a drug store	23%	33%	25%	28%	17%	19%	18%
In a convenience store	23%	32%	37%	25%	20%	15%	15%
From Duty Free	19%	35%	27%	22%	18%	11%	8%

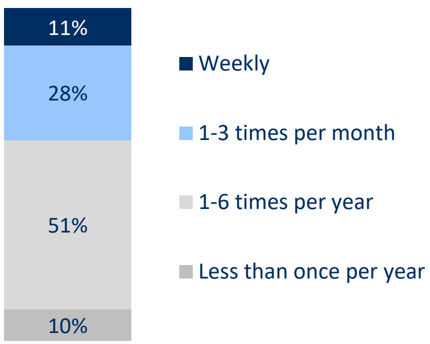
Red / Blue: statistically significantly higher / lower than all US regular wine drinkers at a 95% confidence level
Wine Intelligence Vinitrac® US, October 2020, (n=2,000) US regular wine drinkers

US: ONLINE BUYING BEHAVIOUR

Male wine drinkers, Millennials and Gen X are buying wine online more often than other groups, in line with younger, experiential segments Engaged Explorers and Generation Treaters

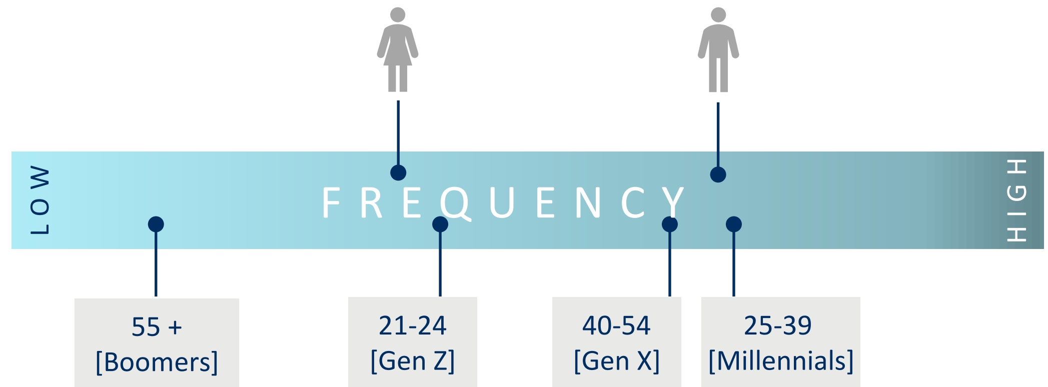
Frequency of online buying

% who buy wine online at the following frequencies
Base = All US regular wine drinkers (n=2,000)



On average
14.8 times per year

Frequency of online buying: by gender and age



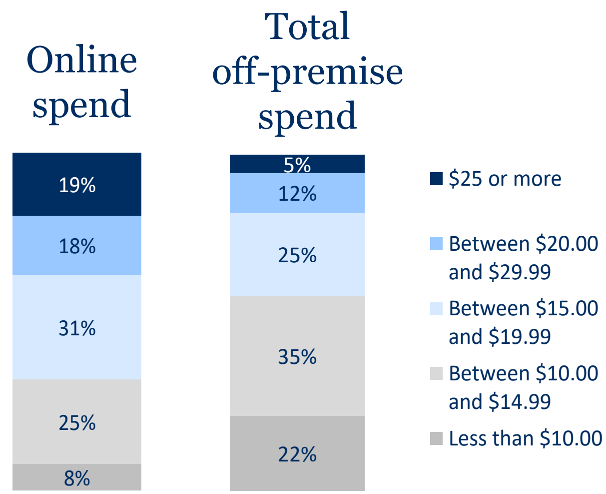
Frequency of online buying: by Portraits

EE: Engaged Explorers / GT: Generation Treaters / MS: Mainstream Suburbans / SN: Social Newbies / SBH: Senior Bargain Hunters / KC: Kitchen Casuals

Wine Intelligence Vinitrac® US, October 2020, (n=2,000) US regular wine drinkers

US: ONLINE BUYING BEHAVIOUR

US regular wine drinkers are spending more online on average than in the off-premise in general and across all demographic groups, but especially male and highly engaged wine drinkers



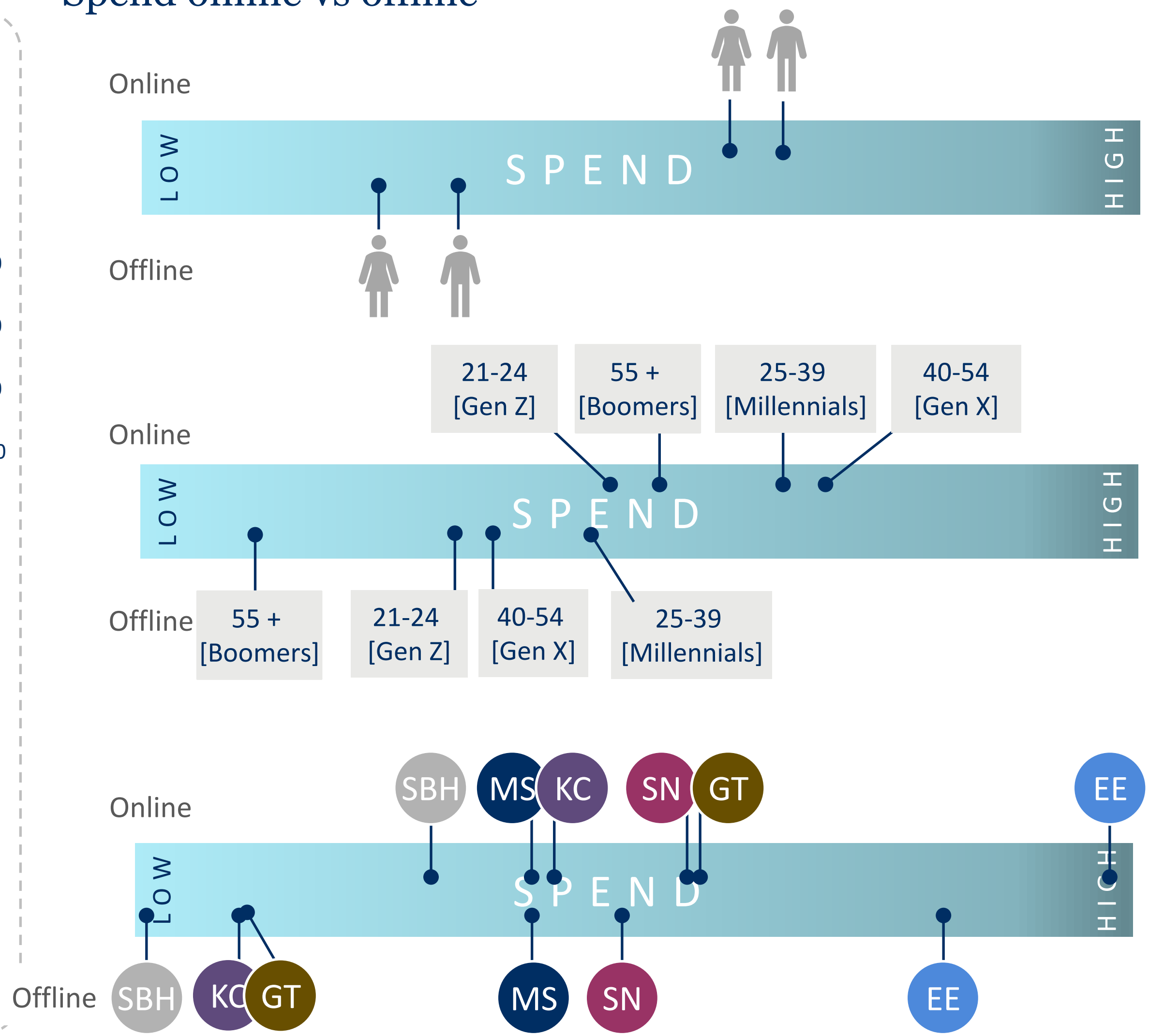
Average spend online $18.20 per bottle

Average off-premise spend $14.54 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 US regular wine drinkers (n=2,000)

Spend online vs offline



US: ONLINE BUYING BEHAVIOUR

Convenience, promotions and exclusive offers are the most important drivers for online wine buyers

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 (63%)
3. Exclusive / limited offer (55%)
4. A tailor-made offer for me (54%)
5. Wines that aren't available in other retailers (53%)

Specific / Pre-arranged delivery date and time slots is especially important to Engaged Explorers (67% vs 52%) and Generation Treaters (88% vs 52%)

More male wine drinkers (47% vs 42%) and Millennials (53% vs 42%) are finding Free accessory (eg corkscrew) to be an important trigger when buying wine online

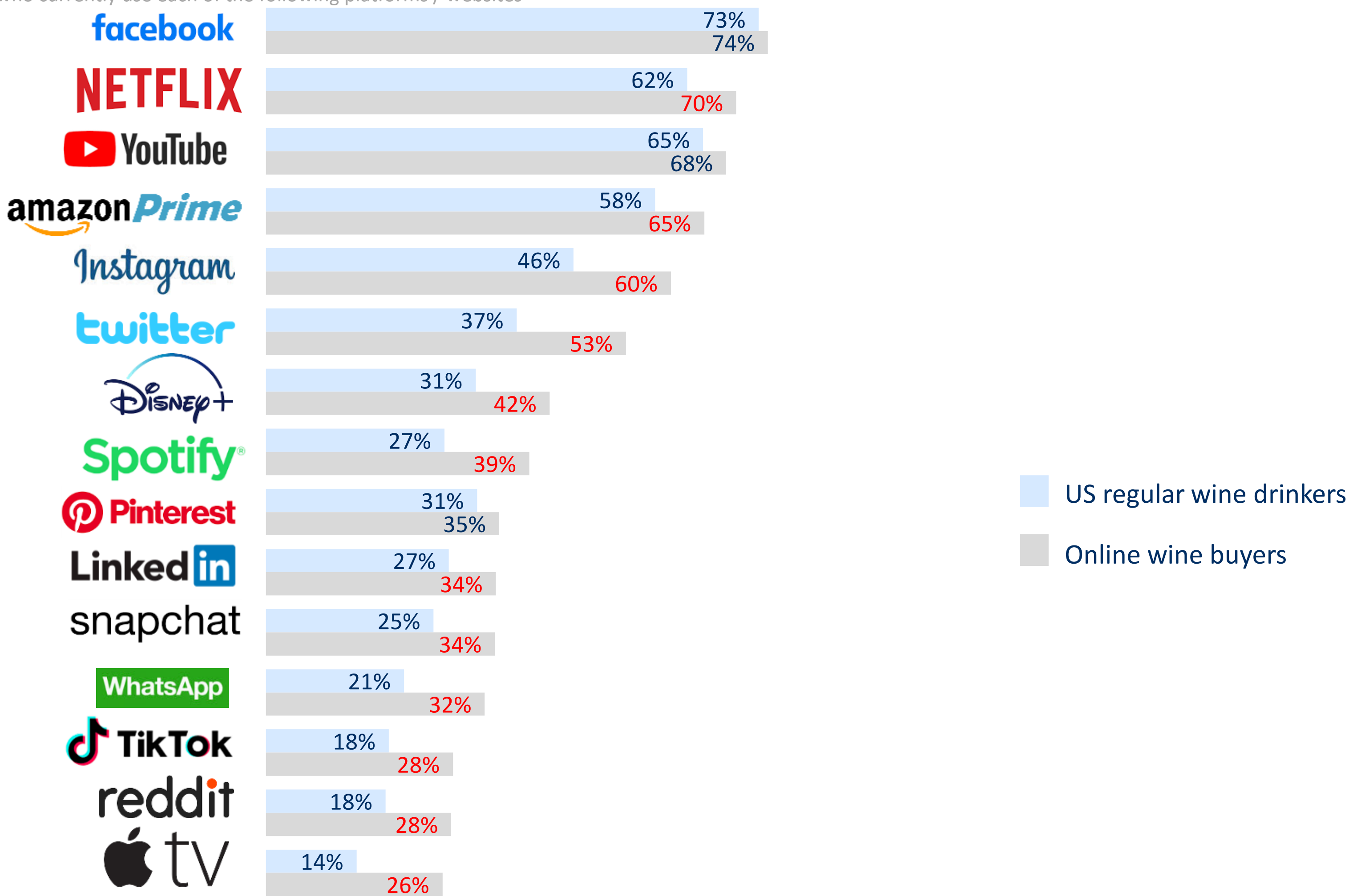
Grey % of US regular wine drinkers
Wine Intelligence Vinitrac® US, October 2020, (n=2,000) US regular wine drinkers

US: ONLINE PLATFORM USAGE

Online wine buyers are more likely to use other online media platforms compared with US regular wine drinkers

Online platform usage

% who currently use each of the following platforms / websites



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

Wine Intelligence Vinitrac® US, October 2020, (n=2,000) US regular wine drinkers

US: SOURCES OF INFORMATION

Male and young to mid aged wine drinkers are more likely to use online sources to look for information for wine, whilst female and 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 US regular wine drinkers (n=2,000)

Online sources

	US regular wine drinkers	Gender		Age groups			
		Male	Female	21-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55 and over [Boomers]
n=	*2,000*	1,026	974	148	602	508	742
Friends, family or colleagues	82%	82%	81%	80%	89%	83%	75%
In-store shelf signs / display with information about wine	76%	74%	78%	72%	83%	82%	67%
Search engine	61%	67%	55%	78%	80%	72%	35%
Lifestyle / cooking magazine wine sections or columns	54%	56%	52%	55%	68%	61%	38%
Comments of online shopping website	50%	53%	47%	60%	70%	62%	23%
Social media	50%	50%	49%	71%	76%	59%	17%
A wine producer or wine brand's website or Facebook	46%	51%	42%	52%	67%	55%	22%
Information online from a wine blogger / wine expert	45%	50%	40%	59%	63%	56%	21%
Wine magazine	45%	51%	39%	44%	57%	51%	32%
Wine guide / book	44%	35%	39%	45%	46%	39%	27%
Newspaper or magazine's website	43%	49%	36%	49%	55%	48%	28%
A wine app	35%	42%	29%	44%	51%	43%	15%

Red / Blue: statistically significantly higher / lower than all US regular wine drinkers at a 95% confidence level
Wine Intelligence Vinitrac® US, October 2020, (n=2,000) US regular wine drinkers

US: 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 US regular wine drinkers (n=2,000)

Online sources

	US regular wine drinkers	Portraits					
		Engaged Explorers	Generation Treaters	Mainstream Suburbans	Social Newbies	Senior Bargain Hunters	Kitchen Casuals
n=	*2,000*	289	223	437	309	418	325
Friends, family or colleagues	82%	88%	93%	82%	85%	79%	68%
In-store shelf signs / display with information about wine	76%	84%	89%	83%	80%	68%	57%
Search engine	61%	80%	92%	65%	70%	42%	34%
Lifestyle / cooking magazine wine sections or columns	54%	73%	89%	56%	65%	36%	23%
Comments of online shopping website	50%	71%	89%	48%	62%	28%	22%
Social media	50%	65%	91%	44%	63%	31%	25%
A wine producer or wine brand's website or Facebook	46%	68%	91%	46%	57%	21%	20%
Information online from a wine blogger / wine expert	45%	69%	89%	44%	59%	19%	19%
Wine magazine	45%	72%	85%	49%	52%	17%	18%
Wine guide / book	44%	42%	54%	41%	41%	28%	23%
Newspaper or magazine's website	43%	59%	86%	39%	53%	25%	19%
A wine app	35%	56%	85%	30%	46%	11%	11%

Red / Blue: statistically significantly higher / lower than all US regular wine drinkers at a 95% confidence level
Wine Intelligence Vinitrac® US, October 2020, (n=2,000) US regular wine drinkers

US: SOURCES OF INFORMATION

Gen Z wine drinkers are more likely to trust Social media as a source of information, whilst older wine drinkers trust their peers and magazines more

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

	US regular wine drinkers	Gender		Age groups			
		Male	Female	21-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55 and over [Boomers]
Friends, family or colleagues	70%	64%	76%	59%	64%	67%	80%
Wine magazine	47%	47%	46%	34%	37%	51%	60%
In-store shelf signs / display with information about wine	45%	41%	49%	35%	43%	44%	50%
Search engine	43%	43%	43%	41%	46%	45%	35%
Wine guide / book	41%	39%	43%	27%	37%	42%	50%
Social media	40%	40%	40%	52%	44%	37%	19%
Lifestyle / cooking magazine wine sections or columns	40%	35%	46%	29%	32%	42%	52%
Information online from a wine blogger / wine expert	39%	37%	42%	34%	38%	46%	33%
A wine producer or wine brand's website or Facebook	38%	39%	35%	28%	41%	40%	29%
A wine app	37%	36%	39%	31%	37%	41%	32%
Comments of online shopping website	35%	32%	38%	35%	38%	38%	21%
Newspaper or magazine's website	28%	28%	29%	22%	29%	27%	32%

Red / Blue: statistically significantly higher / lower than all US regular wine drinkers at a 95% confidence level
Wine Intelligence Vinitrac® US, October 2020, (n=2,000) US regular wine drinkers

US: SOURCES OF INFORMATION

Engaged Explorers are more likely to trust wine producer and brands' websites or comments on online shopping websites

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	US regular wine drinkers	Portraits: Engaged Explorers	Generation Treaters	Mainstream Suburbans	Social Newbies	Senior Bargain Hunters	Kitchen Casuals
Friends, family or colleagues	70%	60%	44%	76%	64%	85%	81%
Wine magazine	47%	41%	46%	41%	44%	36%	52%
In-store shelf signs / display with information about wine	45%	54%	37%	55%	42%	43%	42%
Search engine	43%	41%	40%	48%	40%	50%	48%
Wine guide / book	41%	44%	44%	36%	37%	38%	38%
Social media	40%	48%	33%	47%	36%	41%	27%
Lifestyle / cooking magazine wine sections or columns	40%	46%	29%	46%	33%	45%	38%
Information online from a wine blogger / wine expert	39%	41%	31%	36%	31%	40%	28%
A wine producer or wine brand's website or Facebook	38%	47%	38%	46%	30%	30%	36%
A wine app	37%	43%	43%	39%	30%	33%	31%
Comments of online shopping website	35%	46%	36%	36%	29%	34%	39%
Newspaper or magazine's website	28%	28%	28%	35%	26%	29%	16%

Grey shading = sample size <50
Red / Blue: statistically significantly higher / lower than all US regular wine drinkers at a 95% confidence level
Wine Intelligence Vinitrac® US, October 2020, (n=2,000) US regular wine drinkers

CONTENTS

METHODOLOGY

Vinitrac® US

- The data for this report was collected in the US in October 2020
- Data was gathered via Wine Intelligence's Vinitrac® online survey
- Respondents were screened to ensure that they were at least 21 years old; drank red, white, rosé or blush wine at least once a month; and bought wine in the off-premise or in the on-premise
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The data is representative of US regular wine drinkers in terms of gender, age and US Divisions
- The distribution of the sample is shown in the table:

		Oct-20
	n=	*2,000*
Gender	Male	51%
	Female	49%
	Total	***100%***
Age	21-24	7%
	25-34	21%
	35-44	20%
	45-54	14%
	55-64	15%
	65 and over	22%
	Total	***100%***
US Divisions	New England	5%
	Middle Atlantic	15%
	East North Central	11%
	West North Central	7%
	South Atlantic	21%
	East South Central	4%
	West South Central	11%
	Mountain	7%
	Pacific	19%
	Total	***100%***

Source: Wine Intelligence, Vinitrac® US, October 2020 (n= 2,000) US 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 wine intelligence

Connecting wine businesses with knowledge and insights globally

Wine Intelligence London (Head Office)

109 Maltings Place
169 Tower Bridge Road
London
SE1 3LJ

Telephone: +44 (0) 208 194 0090
Email: info@wineintelligence.com
Website: www.wineintelligence.com
Follow us: