WINE INTELLIGENCE

OPPORTUNITIES FOR LOW- AND NO-ALCOHOL WINE IN THE US MARKET

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CONTEXT: WINE TYPE OPPORTUNITY INDEX

Using four measures (awareness, intent to purchase, purchase consideration and affinity)this index shows the strength of opportunity for alternative wine types

- The index is **weighted to reflect the size of the wine drinking population** in each market, enabling the wine opportunity index to be **reflective of the global market opportunity**

Increase in rank position since 2018 / 2019

Decrease in rank position since 2018 / 2019

No change in rank position since 2018 / 2019

WINE TYPE OPPORTUNITY INDEX

The ranking of the opportunity for alternative wine types in 2021 remained stable vs. 2019, although there has been a decline in the ***level*** of opportunity – with the opportunity score decreasing for the majority of wine types

	Type of wine	2021 weighted opportunity index	2019 score difference	2019 rank difference
1st	Organic wine	47.9	-0.1	=
2nd	Sustainably produced wine	42.1	-2.1	=
3rd	Environmentally friendly wine	41.1	0.2	1 ⬆
4th	Fairtrade wine	38.6	-2.7	-1 ⬇
5th	Preservative free wine	37.3	-1.7	=
6th	Sulphite free wine	34.2	-2.7	=
7th	Wine from a carbon neutral winery	32.1	-0.5	=
8th	Lower alcohol wine	31.4	-0.2	=
9th	Orange / skin contact wine	27.6	-3.0	=
10th	Biodynamic wine	27.4	-1.2	=
11th	Non-alcoholic wine	24.9	-1.7	=
12th	Vegan wine	22.1	-3.5	=
13th	Vegetarian wine	21.8	1.5	=

= top 5 wine types per measure

= score increased compared with 2019

= score decreased compared with 2019

Source: Wine Intelligence, Vinitrac® 2019 (n=16,704) and 2020 (n=17,852) wine drinkers in Australia, Belgium, Brazil, Canada, Germany, France, Ireland, Japan, Netherlands, New Zealand, Portugal, South Korea, Spain, Sweden, Switzerland, UK and US global wine markets

GLOBAL WINE TYPE OPPORTUNITY INDEX 2021

In line with the majority of global markets, the opportunity for lower- and non-alcoholic wine remains lower in the US compared with other alternative wine types

Rank	Type of wine	AUS	BEL	BRA	CAN	DEU	FRA	IRL	JPN	NLD	NZL	PRT	KOR	ESP	SWE	CHE	GBR	USA	Weighted opportunity index
1st	Organic wine	42	47	48	44	54	56	51	50	46	38	32	48	33	65	54	45	48	47.9
2nd	Sustainably produced wine	42	40	52	39	46	31	45	28	38	39	46	36	45	45	45	43	45	42.1
3rd	Environmentally friendly wine	39	30	45	36	39	41	43	33	31	39	30	46	51	40	41	40	43	41.1
4th	Fairtrade wine	36	44	35	35	45	31	49	26	43	30	29	39	40	50	40	53	40	38.6
5th	Preservative free wine	40	28	49	34	30	30	35	55	25	27	32	33	32	31	27	35	38	37.3
6th	Sulphite free wine	36	36	27	34	28	45	35	37	24	29	35	23	39	27	31	34	37	34.2
7th	Wine from a carbon neutral winery	33	26	35	28	33	24	35	28	21	30	25	28	32	32	28	36	38	32.1
8th	Lower alcohol wine	39	23	50	27	29	22	38	23	29	41	36	33	31	27	20	35	28	31.4
9th	Orange / skin contact wine	27	21	27	29	28	17	28	32	21	19	22	28	28	30	17	28	33	27.6
10th	Biodynamic wine	26	28	29	24	27	32	32	27	21	22	17	25	19	24	31	28	29	27.4
11th	Non-alcoholic wine	31	25	33	25	28	18	34	22	29	30	17	27	22	37	15	31	20	24.9
12th	Vegan wine	23	21	24	20	22	12	22	17	19	21	18	26	20	30	20	28	26	22.1
13th	Vegetarian wine	20	19	21	19	18	17	22	18	19	17	20	22	23	20	10	25	27	21.8

= ranks among the top 3 in the market

Source: Wine Intelligence, Vinitrac® 2019 (n=16,704) and 2020 (n=17,852) wine drinkers in Australia, Belgium, Brazil, Canada, Germany, France, Ireland, Japan, Netherlands, New Zealand, Portugal, South Korea, Spain, Sweden, Switzerland, UK and US global wine markets

GLOBAL WINE TYPE OPPORTUNITY INDEX 2021

Awareness of lower- and non-alcoholic wines has increased in the last two years, although this is countered by declining purchase consideration and affinity levels

wine intelligence

	Type of wine	Global wine type wine opportunity index			Global awareness index		Global sought to purchase index		Global consideration index		Global affinity index	
		2021 weighted opportunity index	2019 score difference	2019 rank difference	2021 weighted awareness index	2019 score difference	2021 weighted sought to purchase index	2019 score difference	2021 weighted consideration index	2019 score difference	2021 weighted affinity index	2019 score difference
1st	Organic wine	47.9	-0.1	=	53.7	1.8	27.3	1.4	58.4	-1.6	49.6	-2.6
2nd	Sustainably produced wine	42.1	-2.1	=	28.8	1.1	26.9	0.2	64.3	-3.1	56.6	-6.8
3rd	Environmentally friendly wine	41.1	0.2	1↑	27.1	3.4	27.4	0.4	62.3	0.0	55.8	-3.3
4th	Fairtrade wine	38.6	-2.7	-1↓	27.6	-1.3	23.9	0.2	59.3	-2.9	51.1	-6.1
5th	Preservative free wine	37.3	-1.7	=	25.2	1.0	25.1	0.4	57.3	-3.5	49.5	-5.6
6th	Sulphite free wine	34.2	-2.7	=	24.9	0.6	21.2	-1.5	53.2	-4.4	44.3	-6.2
7th	Wine from a carbon neutral winery	32.1	-0.5	=	10.9	2.0	26.1	-3.8	57.4	-1.6	48.3	-0.8
8th	Lower alcohol wine	31.4	-0.2	=	36.4	1.0	19.2	-1.1	36.0	-0.2	31.3	-0.9
9th	Orange / skin contact wine	27.6	-3.0	=	8.4	1.0	28.1	-5.5	49.0	-3.4	39.0	-5.8
10th	Biodynamic wine	27.4	-1.2	=	8.7	1.5	27.6	-0.3	49.2	0.6	38.1	-5.7
11th	Non-alcoholic wine	24.9	-1.7	=	39.3	-1.5	12.3	-2.0	23.3	-1.7	17.5	-1.8
12th	Vegan wine	22.1	-3.5	=	15.2	1.9	16.6	-5.0	34.8	-7.7	27.4	-6.6
13th	Vegetarian wine	21.8	1.5	=	8.5	1.5	21.0	2.4	35.2	1.4	31.0	0.9

= top 5 wine types per measure

= score increased compared with 2019

= score decreased compared with 2019

Source: Wine Intelligence, Vinitrac® 2019 (n=16,704) and 2020 (n=17,852) wine drinkers in Australia, Belgium, Brazil, Canada, Germany, France, Ireland, Japan, Netherlands, New Zealand, Portugal, South Korea, Spain, Sweden, Switzerland, UK and US global wine markets

vinitrac

GLOBAL WINE TYPE OPPORTUNITY INDEX 2021

INTENT TO PURCHASE COMPARED WITH 'NO CLAIM' CONTROL SAMPLE

Green = Relative strength within each market

Red = Relative weakness within each market

Inline with other countries, purchase intent for lower- or non-alcoholic wine remains low in the US

% who would be likely or very likely to buy each wine minus those Likely or very likely to buy the No Claim wine

Base = All Australian, Canadian, Swedish, UK and US regular wine drinkers (n≥500)

Bottle Tested	Australia	Canada	Sweden	UK	US
Award Winning	13%	10%	11%	14%	14%
Established 1870	8%	4%	7%	11%	8%
Natural Wine	7%	8%	5%	4%	9%
Organic* Wine	-3%	6%	13%	-4%	7%
Environmentally Friendly	-1%	7%	10%	3%	2%
Sustainably Produced	3%	5%	9%	5%	1%
Preservative Free	7%	3%	-3%	-6%	3%
Fairtrade	-3%	1%	14%	11%	-3%
Sulphite Free Wine	-1%	6%	3%	-8%	-4%
Carbon Neutral	-5%	-4%	-1%	-6%	-11%
Cannabis Infused	-14%	-7%	-10%	-24%	-12%
Biodynamic Wine	-16%	-10%	1%	-20%	-19%
Vegan Wine	-21%	-11%	-8%	-22%	-18%
Lower Alcohol Wine	-6%	-9%	-10%	-17%	-22%
Vegetarian Wine	-18%	-14%	-6%	-21%	-19%
Non Alcoholic Wine	-15%	-11%	-13%	-23%	-22%

Examples of bottles tested

*in the US 'Organic wine' was asked as 'wine made with organic grapes'

Source: Wine Intelligence, Vinitrac®, October 2020 (n≥500), Australian, Canadian, Swedish, UK and US regular wine drinkers

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US: KEY TAKEAWAYS

1. Despite relatively strong awareness levels for lower- and non-alcoholic wine, the proportion of drinkers who have looked to buy (or would be willing to buy) these types of wines remains relatively small

2. Younger drinkers (from LDA - 35 yrs) are more actively moderating their alcohol consumption in the US, being more open to lower-alcohol, no-alcohol and cannabis alternatives

3. The opportunity for lower- and non-alcoholic wines in the US has deceased since 2019

4. Key opportunity target for lower- and non-alcoholic wine is younger (LDA - 35 yrs) wine drinkers who:
   - Are more likely than other drinkers to purchase lower- and non-alcoholic wine
   - Are more likely than other wine drinkers to consider purchasing non-alcoholic wine in the future
   - Have stronger affinity for lower- and non-alcoholic wine
   - Are strongly motivated by the desire to stay in control
   - Are motivated to drink lower-alcohol wine to fit in with their peers
   - Are motivated by the lower-calorie benefits of lower-alcohol wine

5. More involved and frequent wine drinkers (Engaged Explorers & Generation Treaters), however, lead the opportunity for lower-alcohol wine due to their openness to explore and discover 'naturally' lower in alcohol wine types and styles

6. The main driver for consumers to choose lower-alcohol wine is the perceived health benefit, such as low calorie, and because of the taste profile

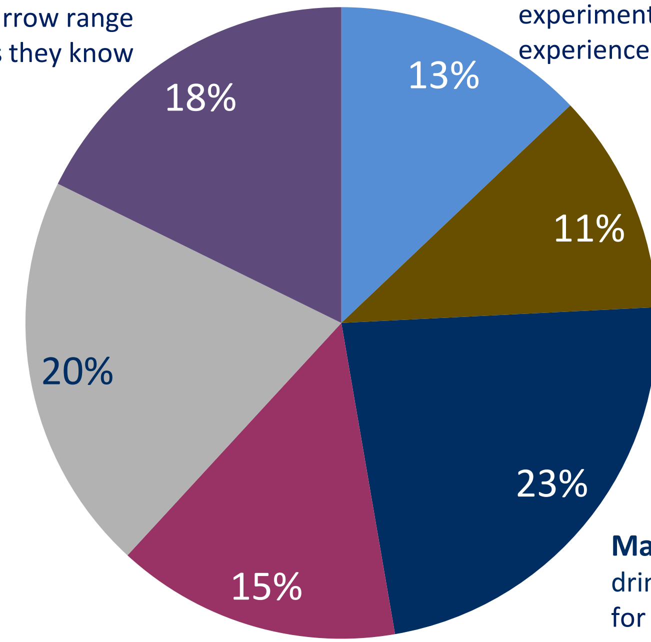
7. Key barriers to lower-alcohol wine are that consumers are put off by the 'lack' of alcohol content and lack of availability

US PORTRAITS: WINE DRINKER SEGMENTATION (2021)

% share of US regular wine drinkers by Portraits segments US 2021

Kitchen Casuals: One of the oldest segments, they are infrequent and low-spending wine drinkers, with very few consuming wine in the on-premise. They show a limited interest in the wine category, sticking to the narrow range of wines they know

Engaged Explorers: A younger to mid-aged segment (typically Millennial and Gen X), they are one of the most frequent wine drinking segments and the highest spenders on wine, buying from a broad repertoire of wine styles, countries and regions. The most experimental group, actively seeking opportunities to build wine experiences with highest wine knowledge and confidence



Generation Treaters: One of the younger segments (mainly Millennials), who are the most frequent drinkers but only mid-range spenders. They have lower levels of wine knowledge due to being 'newer to wine drinkers', but are confident drinkers who are exploring and learning about the category, open to trying a wide variety of wine types

Senior Bargain Hunters: The least frequent and oldest wine drinking segment. Time in the category has led to relatively strong wine knowledge, however they purchase from a narrow repertoire of wine styles and brands, being strongly value driven

Mainstream Suburbans: Mid and older aged drinkers, who are frequent wine drinkers (mainly for informal occasions), yet among the lowest spenders per bottle. Their time spent in the category leads to high wine knowledge and confidence and they enjoy drinking a broad range of more mainstream wines

Social Newbies: The youngest segment, drinking wine quite frequently (on average twice a week), who are mid to higher spenders with wine not yet fully integrated into their lifestyle. They have limited wine knowledge and rely heavily on recommendations when it comes to buying wine and they are usually happy to drink what is poured for them

Sources: Wine Intelligence, Vinitrac® US, July and October '20, (n=10,000) US regular wine drinkers
Wine Intelligence, consumers interviews

ALCOHOL MODERATION

Both younger and male regular wine drinkers in the US are more likely to be actively moderating their alcohol intake, being more open to lower-alcohol, no-alcohol and cannabis alternatives

Alcohol moderation

% who selected the following statements
Base = All US regular wine drinkers (n=2,000)

		Gender		Age			Wine Involvement		
	All US regular wine drinkers	Male	Female	21-34	35-54	55+	Low	Medium	High
n=	*2,000*	*1,026*	*974*	*567*	*691*	*742*	*424*	*1,025*	*551*
I'm NOT actively reducing the amount of alcohol I drink	64%	61%	68%	51%	59%	79%	67%	65%	60%
I'm actively reducing the amount of alcohol I drink by not drinking alcohol at some occasions	19%	19%	19%	24%	20%	14%	20%	18%	19%
I'm actively reducing the amount of alcohol I drink by switching to lower alcohol options at some occasions	14%	17%	11%	25%	17%	4%	11%	14%	18%
I'm actively reducing the amount of alcohol I drink by switching to non-alcoholic drinks at some occasions	12%	15%	10%	17%	15%	6%	11%	11%	16%
I'm actively reducing the amount of alcohol I drink by switching to cannabis products	7%	9%	4%	11%	8%	2%	4%	6%	10%

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

ALCOHOL MODERATION

Younger segments Generation Treaters and Social Newbies are more likely to be moderating their alcohol consumption, although it should be noted that they are typically more frequent wine drinkers in general

Alcohol moderation: By Portraits

% who selected the following statements
Base = All US regular wine drinkers (n=2,000)

	All US regular wine drinkers	Portraits					
		Engaged Explorers	Generation Treaters	Mainstream Suburbans	Social Newbies	Senior Bargain Hunters	Kitchen Casuals
n=	*2,000*	*214*	*200*	*464*	*294*	*451*	*378*
I'm NOT actively reducing the amount of alcohol I drink	64%	69%	26%	78%	50%	67%	73%
I'm actively reducing the amount of alcohol I drink by not drinking alcohol at some occasions	19%	16%	34%	12%	20%	23%	16%
I'm actively reducing the amount of alcohol I drink by switching to lower alcohol options at some occasions	14%	12%	42%	9%	27%	7%	6%
I'm actively reducing the amount of alcohol I drink by switching to non-alcoholic drinks at some occasions	12%	10%	32%	8%	20%	9%	7%
I'm actively reducing the amount of alcohol I drink by switching to cannabis products	7%	7%	20%	3%	10%	5%	3%

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

WINE TYPE OPPORTUNITY INDEX

While the awareness of lower- and non-alcoholic wine is more in line with other wine types, the proportion of drinkers who have looked to buy (or would be willing to buy) lower- or non-alcoholic wine remains relatively small

US Wine Type Opportunity Index

	Type of wine	Base = All sample	Base = Those who are aware of the following types of wine			2021 opportunity index	2019 opportunity index	2019 rank difference
		Awareness	Sought to purchase	Future purchase consideration	Affinity			
1st	Organic wine	44%	28%	67%	56%	48.0	51.3	=
2nd	Sustainably produced wine	24%	26%	75%	68%	45.0	46.9	=
3rd	Environmentally friendly wine	24%	30%	69%	61%	43.0	46.9	=
4th	Fairtrade wine	18%	27%	70%	60%	40.0	44.0	=
5th	Preservative free wine	17%	25%	67%	56%	38.0	42.0	1 ↑
6th	Wine from a carbon neutral winery	11%	33%	64%	58%	38.0	39.3	2 ↑
7th	Sulphite free wine	23%	20%	61%	52%	37.0	42.2	-2 ↓
8th	Orange / skin contact wine	8%	34%	55%	51%	33.0	40.6	-1 ↓
9th	Biodynamic wine	7%	35%	53%	40%	29.0	34.1	=
10th	Lower alcohol wine	29%	16%	36%	31%	28.0	31.6	2 ↑
11th	Vegetarian wine	7%	32%	44%	40%	27.0	33.9	-1 ↓
12th	Vegan wine	12%	23%	43%	35%	26.0	32.5	-1 ↓
13th	Non-alcoholic wine	30%	10%	22%	15%	20.0	26.5	=

Source: Wine Intelligence, Vinitrac® US, March 2019 and October 2020 (n=2,000), US regular wine drinkers

WINE TYPE OPPORTUNITY INDEX

The opportunity for lower- and non-alcoholic wines in the US has deceased since 2019

US Wine Type Opportunity Index

Type of wine	Base = All sample			Base = Those who are aware of the following wine types								
	Awareness			Sought to Purchase			Consideration			Affinity		
	2019	2020	1-year tracking	2019	2020	1-year tracking	2019	2020	1-year tracking	2019	2020	1-year tracking
Organic wine	46%	44%	→	30%	28%	→	70%	67%	→	62%	56%	↓
Sustainably produced wine	28%	24%	↓	27%	26%	→	74%	75%	→	68%	68%	→
Environmentally friendly wine	23%	24%	→	32%	30%	→	74%	69%	→	71%	61%	↓
Fairtrade wine	19%	18%	→	30%	27%	→	74%	70%	→	68%	60%	↓
Preservative free wine	22%	17%	↓	30%	25%	→	70%	67%	→	59%	56%	→
Wine from a carbon-neutral winery	12%	11%	→	39%	33%	→	68%	64%	→	57%	58%	→
Sulphite free wine	23%	23%	→	24%	20%	→	70%	61%	↓	63%	52%	↓
Orange / skin contact wine	10%	8%	↓	45%	34%	↓	70%	55%	↓	59%	51%	→
Biodynamic wine	7%	7%	→	41%	35%	→	58%	53%	→	49%	40%	→
Lower alcohol wine	32%	29%	↓	22%	16%	↓	38%	36%	→	33%	31%	→
Vegetarian wine	9%	7%	↓	36%	32%	→	58%	44%	↓	49%	40%	→
Vegan wine	13%	12%	→	29%	23%	→	55%	43%	↓	46%	35%	↓
Non-alcoholic wine	33%	30%	→	17%	10%	↓	31%	22%	↓	23%	15%	↓

↑ / ↓ : Statistically significantly higher / lower than the March 2019 wave at a 95% confidence level

Source: Wine Intelligence, Vinitrac® US, March 2019 and October 2020 (n=2,000), US regular wine drinkers

ALTERNATIVE WINES AWARENESS

Awareness of lower- and non-alcoholic wines is relatively high among US wine drinkers, especially with highly involved wine drinkers

Alternative wines awareness: By gender, age and involvement

% who are aware of the following types of wine
Base = All US regular wine drinkers (n=2,000)

		Gender		Age			Wine Involvement		
	All US regular wine drinkers	Male	Female	21-34	35-54	55+	Low	Medium	High
n=	2,000	1,026	974	567	691	742	424	1,025	551
Organic wine	44%	41%	47%	46%	44%	41%	30%	45%	51%
Non-alcoholic wine	30%	27%	34%	30%	31%	29%	25%	30%	34%
Lower alcohol wine	29%	29%	29%	31%	28%	28%	21%	27%	39%
Sustainably produced wine	24%	25%	24%	21%	26%	26%	16%	24%	31%
Environmentally friendly wine	24%	24%	23%	29%	24%	19%	14%	22%	35%
Sulphite free wine	23%	22%	23%	18%	22%	27%	16%	24%	26%
Fairtrade wine	18%	19%	17%	19%	20%	15%	11%	17%	25%
Preservative free wine	17%	17%	17%	19%	19%	14%	10%	17%	24%
Vegan wine	12%	14%	10%	18%	15%	5%	7%	11%	18%
Wine from a carbon-neutral winery	11%	13%	8%	15%	14%	5%	4%	9%	19%
Orange / skin contact wine	8%	10%	5%	11%	10%	2%	5%	5%	14%
Vegetarian wine	7%	9%	5%	11%	9%	2%	2%	5%	13%
Biodynamic wine	7%	9%	4%	9%	10%	2%	2%	5%	13%
None of these	21%	19%	23%	12%	18%	30%	34%	21%	11%

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

ALTERNATIVE WINES AWARENESS

Mainstream Matures are more aware of lower- and non-alcoholic wine, in line with their higher level of wine knowledge that has been built up over time in the category

Alternative wines awareness: By Portraits

% who are aware of the following types of wine
Base = All US regular wine drinkers (n=2,000)

		Portraits					
	All US regular wine drinkers	Engaged Explorers	Generation Treaters	Mainstream Suburbans	Social Newbies	Senior Bargain Hunters	Kitchen Casuals
n=	*2,000*	*214*	*200*	*464*	*294*	*451*	*378*
Organic wine	44%	55%	36%	52%	39%	43%	34%
Non-alcoholic wine	30%	35%	24%	37%	27%	31%	23%
Lower alcohol wine	29%	34%	31%	38%	28%	25%	19%
Sustainably produced wine	24%	30%	24%	31%	24%	23%	16%
Environmentally friendly wine	24%	40%	23%	29%	22%	20%	12%
Sulphite free wine	23%	28%	24%	28%	18%	23%	16%
Fairtrade wine	18%	25%	21%	22%	17%	15%	11%
Preservative free wine	17%	29%	20%	19%	16%	15%	11%
Vegan wine	12%	22%	27%	9%	15%	8%	5%
Wine from a carbon-neutral winery	11%	19%	26%	12%	12%	5%	3%
Orange / skin contact wine	8%	15%	21%	6%	9%	3%	3%
Vegetarian wine	7%	9%	25%	5%	10%	3%	2%
Biodynamic wine	7%	12%	24%	4%	8%	2%	2%
None of these	21%	9%	7%	16%	14%	27%	39%

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

ALTERNATIVE WINES SOUGHT TO PURCHASE

US consumers aged 21-34 are more likely than other drinkers to purchase lower- and non-alcoholic wine

Alternative wines sought to purchase: By gender, age and involvement

% who have sought to purchase the following types of wine in the past 6 months
Base = Those who are aware of the following types of wine

		Gender		Age			Wine Involvement		
	Those who are aware of the following types of wine	Male	Female	21-34	35-54	55+	Low	Medium	High
Biodynamic wine	35%	38%	27%	37%	37%	18%	62%	25%	38%
Orange / skin contact wine	34%	35%	33%	38%	36%	15%	17%	35%	38%
Wine from a carbon-neutral winery	33%	38%	26%	38%	38%	8%	33%	31%	35%
Vegetarian wine	32%	34%	28%	30%	41%	0%	19%	25%	39%
Environmentally friendly wine	30%	35%	23%	37%	32%	18%	24%	26%	36%
Organic wine	28%	33%	23%	40%	33%	12%	12%	25%	40%
Fairtrade wine	27%	32%	21%	39%	31%	11%	26%	20%	36%
Sustainably produced wine	26%	31%	20%	36%	29%	16%	23%	24%	29%
Preservative free wine	25%	25%	24%	29%	31%	12%	21%	23%	28%
Vegan wine	23%	32%	11%	24%	29%	3%	12%	15%	35%
Sulphite free wine	20%	22%	19%	29%	27%	11%	16%	20%	23%
Lower alcohol wine	16%	18%	13%	22%	21%	6%	17%	11%	22%
Non-alcoholic wine	10%	13%	8%	18%	10%	4%	9%	7%	15%
None of these	50%	41%	60%	34%	42%	75%	66%	55%	33%

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

ALTERNATIVE WINES SOUGHT TO PURCHASE

Generation Treaters are more likely to have sought to purchase lower- and non-alcoholic wines

Alternative wines sought to purchase: By Portraits

% who have sought to purchase the following types of wine in the past 6 months
Base = Those who are aware of the following types of wine

	Those who are aware of the following types of wine	Portraits: Engaged Explorers	Generation Treaters	Mainstream Suburbans	Social Newbies	Senior Bargain Hunters	Kitchen Casuals
Biodynamic wine	35%	45%	39%	15%	44%	26%	0%
Orange / skin contact wine	34%	32%	49%	31%	31%	16%	21%
Wine from a carbon-neutral winery	33%	36%	39%	24%	39%	25%	40%
Vegetarian wine	32%	12%	52%	27%	29%	8%	15%
Environmentally friendly wine	30%	43%	43%	23%	32%	23%	20%
Organic wine	28%	39%	61%	29%	35%	16%	8%
Fairtrade wine	27%	43%	57%	19%	36%	14%	6%
Sustainably produced wine	26%	37%	47%	21%	33%	15%	18%
Preservative free wine	25%	28%	54%	18%	31%	19%	8%
Vegan wine	23%	19%	55%	10%	25%	0%	12%
Sulphite free wine	20%	23%	44%	16%	17%	16%	19%
Lower alcohol wine	16%	24%	32%	13%	20%	4%	14%
Non-alcoholic wine	10%	13%	33%	8%	10%	5%	8%
None of these	50%	30%	8%	55%	39%	72%	72%

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

ALTERNATIVE WINES CONSIDERATION

Younger consumers in the US are more likely than other wine drinkers to consider purchasing non-alcoholic wine in the future

Alternative wines consideration: By gender, age and involvement

% who would consider purchasing the following types of wine in the future
Base = Those who are aware of the following types of wine

	Those who are aware of the following types of wine	Gender		Age			Wine Involvement		
		Male	Female	21-34	35-54	55+	Low	Medium	High
Sustainably produced wine	75%	74%	77%	71%	76%	76%	74%	75%	75%
Fairtrade wine	70%	69%	71%	70%	68%	72%	63%	73%	70%
Environmentally friendly wine	69%	68%	71%	67%	71%	70%	66%	72%	67%
Preservative free wine	67%	64%	71%	63%	71%	68%	68%	69%	65%
Organic wine	67%	66%	68%	68%	69%	63%	54%	67%	72%
Wine from a carbon-neutral winery	64%	62%	68%	58%	68%	70%	67%	65%	64%
Sulphite free wine	61%	54%	67%	47%	64%	65%	59%	63%	58%
Orange / skin contact wine	55%	48%	68%	53%	55%	64%	48%	56%	56%
Biodynamic wine	53%	50%	57%	56%	50%	53%	71%	52%	50%
Vegetarian wine	44%	43%	45%	35%	58%	18%	51%	30%	53%
Vegan wine	43%	37%	50%	41%	47%	35%	44%	42%	43%
Lower alcohol wine	36%	38%	34%	43%	38%	29%	37%	31%	42%
Non-alcoholic wine	22%	23%	21%	31%	23%	14%	20%	20%	27%
None of these	17%	14%	19%	10%	14%	25%	26%	18%	9%

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

ALTERNATIVE WINES CONSIDERATION

The key opportunity for lower-alcohol wine is this the more involved wine drinkers Engaged Explorers & Generation Treaters, while the key opportunity for non-alcoholic wine is with the younger consumer segments

Alternative wines consideration: By Portraits

% who would consider purchasing the following types of wine in the future
Base = Those who are aware of the following types of wine

		Portraits					
	Those who are aware of the following types of wine	Engaged Explorers	Generation Treaters	Mainstream Suburbans	Social Newbies	Senior Bargain Hunters	Kitchen Casuals
Sustainably produced wine	75%	84%	76%	73%	64%	78%	78%
Fairtrade wine	70%	75%	67%	68%	63%	74%	77%
Environmentally friendly wine	69%	67%	62%	75%	63%	76%	58%
Preservative free wine	67%	68%	55%	65%	65%	78%	70%
Organic wine	67%	77%	64%	71%	63%	67%	54%
Wine from a carbon-neutral winery	64%	65%	51%	73%	63%	76%	61%
Sulphite free wine	61%	63%	52%	65%	51%	71%	49%
Orange / skin contact wine	55%	72%	40%	55%	52%	71%	50%
Biodynamic wine	53%	60%	45%	50%	68%	38%	43%
Vegetarian wine	44%	47%	57%	34%	34%	38%	28%
Vegan wine	43%	52%	44%	33%	33%	48%	52%
Lower alcohol wine	36%	51%	56%	29%	37%	28%	33%
Non-alcoholic wine	22%	30%	42%	19%	33%	12%	19%
None of these	17%	10%	3%	15%	15%	25%	26%

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

ALTERNATIVE WINES AFFINITY

Affinity for lower- and non-alcoholic wine is stronger among younger wine drinkers

wine intelligence

Alternative wines affinity: By gender, age and involvement

% who think the following types of wine are right for people like them
Base = Those who are aware of the following types of wine

		Gender		Age			Wine Involvement		
	Those who are aware of the following types of wine	Male	Female	21-34	35-54	55+	Low	Medium	High
Sustainably produced wine	68%	60%	76%	64%	72%	66%	71%	67%	67%
Environmentally friendly wine	61%	58%	65%	58%	65%	60%	56%	63%	61%
Fairtrade wine	60%	55%	66%	54%	62%	61%	56%	59%	62%
Wine from a carbon-neutral winery	58%	55%	64%	57%	59%	62%	48%	62%	57%
Organic wine	56%	55%	57%	57%	60%	52%	47%	57%	58%
Preservative free wine	56%	52%	60%	50%	61%	55%	39%	60%	56%
Sulphite free wine	52%	46%	58%	44%	60%	50%	41%	55%	52%
Orange / skin contact wine	51%	48%	55%	48%	52%	55%	31%	43%	61%
Biodynamic wine	40%	34%	52%	39%	38%	53%	19%	44%	40%
Vegetarian wine	40%	39%	42%	34%	54%	6%	33%	34%	45%
Vegan wine	35%	36%	34%	38%	37%	21%	30%	35%	37%
Lower alcohol wine	31%	30%	33%	43%	30%	23%	34%	27%	35%
Non-alcoholic wine	15%	13%	17%	22%	16%	9%	13%	13%	19%
None of these	21%	19%	24%	13%	18%	31%	33%	22%	12%

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

vinitrac.

ALTERNATIVE WINES AFFINITY

Affinity for lower- and non-alcoholic wine is stronger among more wine involved consumers Engaged Explorers

Alternative wines affinity: By Portraits

% who think the following types of wine are right for people like them
Base = Those who are aware of the following types of wine

	Those who are aware of the following types of wine	Portraits					
		Engaged Explorers	Generation Treaters	Mainstream Suburbans	Social Newbies	Senior Bargain Hunters	Kitchen Casuals
Sustainably produced wine	68%	75%	68%	63%	58%	72%	75%
Environmentally friendly wine	61%	64%	45%	62%	51%	71%	63%
Fairtrade wine	60%	64%	56%	60%	52%	61%	65%
Wine from a carbon-neutral winery	58%	65%	46%	67%	54%	67%	51%
Organic wine	56%	61%	58%	60%	51%	54%	52%
Preservative free wine	56%	48%	54%	60%	58%	58%	53%
Sulphite free wine	52%	48%	48%	56%	45%	58%	45%
Orange / skin contact wine	51%	56%	69%	43%	38%	36%	29%
Biodynamic wine	40%	52%	40%	45%	34%	24%	30%
Vegetarian wine	40%	42%	45%	34%	49%	23%	15%
Vegan wine	35%	32%	53%	22%	37%	26%	34%
Lower alcohol wine	31%	38%	44%	26%	41%	24%	29%
Non-alcoholic wine	15%	26%	24%	10%	20%	12%	13%
None of these	21%	14%	6%	20%	16%	32%	29%

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

METHODOLOGY: PURCHASE INTENT: BASED ON CLAIMS ON WINE LABELS

Bottle with **no claim** tested against bottles shown **with claim** – the claims were not highlighted nor pointed out; the bottles were shown in a randomized order to avoid bias

Bottles tested:

No Claim Bottle

Fairtrade

Sulphite Free Wine

Award winning

Sustainably Produced

Environmentally-friendly

Natural Wine

Established 1870

Biodynamic Wine

Carbon Neutral

Vegan Wine

Preservative Free

Vegetarian Wine

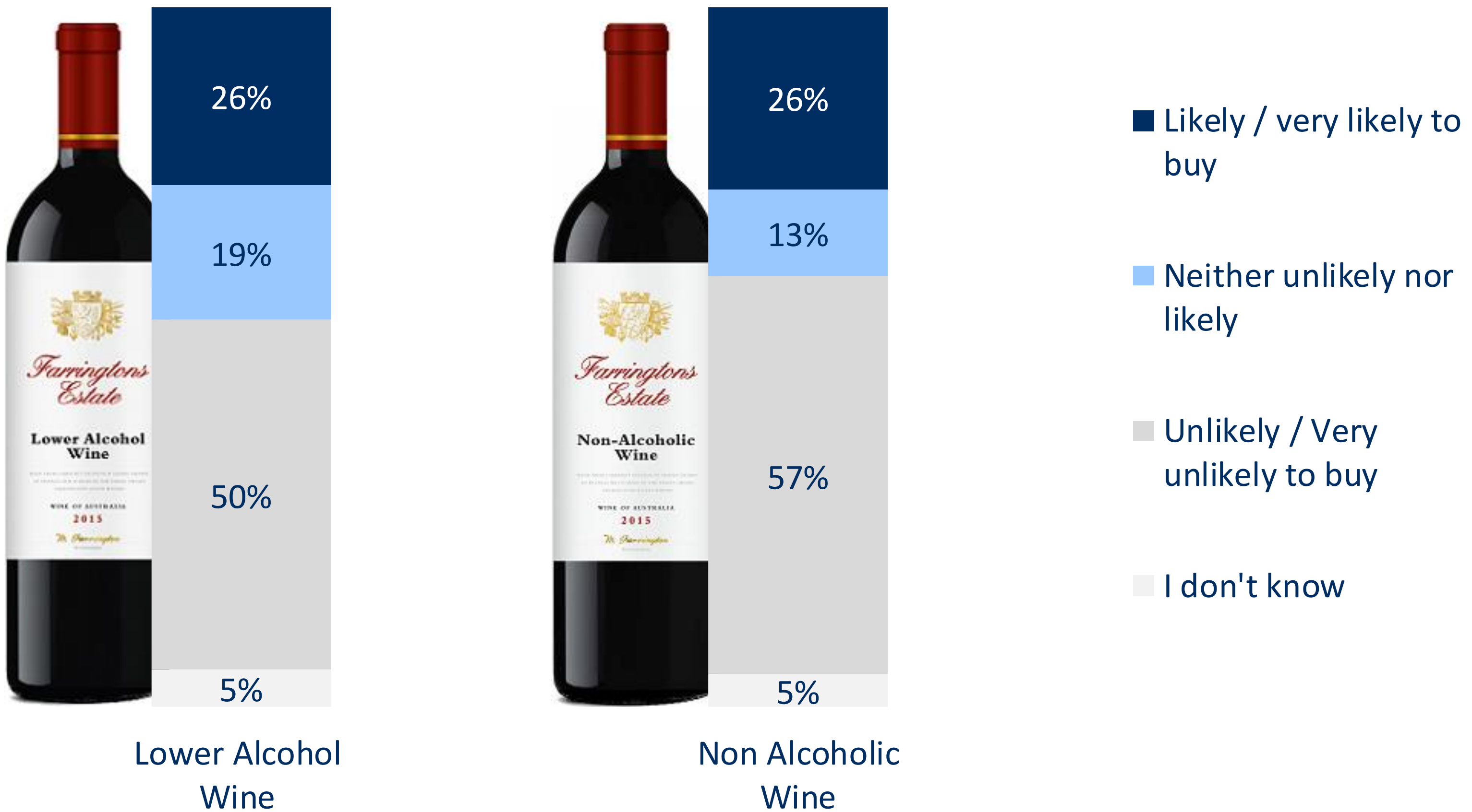
Organic

PURCHASE INTENT: BASED ON CLAIMS ON WINE LABELS

Bottles labelled as lower- and non-alcoholic wine have a similar, and relatively low, purchase intent among US regular wine drinkers

Intent to purchase

% who would be likely or very likely to buy each wine
Base = All US regular wine drinkers (n=2,000)



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

PURCHASE INTENT OF WINE TYPES

Compared with 2019, consumers in the US are less likely to purchase wine that explicitly states lower-alcohol claims

Intent to purchase: Tracking vs March 2019

% who would be likely or very likely to purchase the following wines
Base = All US regular wine drinkers (n=2,000)

		2019	2020	Tracking
	n=	*2,000*	*2,000*	vs. '19
1	Award Winning	61%	62%	➡
2	Natural Wine	57%	57%	➡
3	Established 1870	55%	56%	➡
4	Organic Grapes	52%	55%	⬆
5	Preservative Free	53%	51%	➡
6	Environmentally Friendly	54%	50%	⬇
7	Sustainably Produced	54%	48%	⬇
8	Fairtrade	46%	45%	➡
9	Sulphite Free Wine	44%	44%	➡
10	USDA Organic	52%	44%	⬇
11	Carbon Neutral	38%	37%	➡
12	Vegan Wine	29%	30%	➡
13	Vegetarian Wine	30%	29%	➡
14	Biodynamic Wine	32%	28%	⬇
15	NonAlcoholicWine	27%	26%	➡
16	LowerAlcoholWine	31%	26%	⬇

⬆ / ⬇ : Statistically significantly higher / lower than the March 2019 wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, March 2019 & October 2020 (n=2,000), US regular wine drinkers

PURCHASE INTENT OF WINE TYPES

Purchase intent of alternative wines when explicitly stated is lowest for lower- and non-alcoholic wine

Intent to purchase: By gender, age and involvement

% who would be likely or very likely to purchase the following wines
Base = All US regular wine drinkers (n=2,000)

		Gender		Age			Wine Involvement		
	All US regular wine drinkers	Male	Female	21-34	35-54	55+	Low	Medium	High
n=	2,000	1,026	974	567	691	742	424	1,025	551
Award Winning	62%	62%	62%	67%	63%	58%	41%	62%	81%
Natural Wine	57%	59%	55%	64%	62%	46%	35%	57%	72%
Established 1870	56%	55%	57%	60%	63%	46%	35%	52%	77%
Organic Grapes	55%	56%	54%	60%	64%	42%	33%	56%	71%
Preservative Free	51%	52%	49%	54%	61%	39%	29%	49%	69%
Environmentally Friendly	50%	50%	50%	57%	61%	35%	30%	50%	67%
Sustainably Produced	48%	50%	47%	60%	54%	35%	25%	45%	75%
Fairtrade	45%	48%	42%	47%	55%	34%	24%	41%	66%
Sulphite Free Wine	44%	46%	43%	42%	53%	38%	26%	41%	64%
USDA Organic	44%	47%	41%	52%	53%	29%	23%	41%	66%
Carbon Neutral	37%	40%	33%	44%	47%	23%	24%	33%	55%
Vegan Wine	30%	35%	25%	41%	39%	12%	10%	26%	51%
Vegetarian Wine	29%	33%	25%	38%	40%	12%	12%	25%	49%
Biodynamic Wine	28%	35%	21%	34%	43%	11%	10%	25%	49%
Non Alcoholic Wine	26%	31%	21%	37%	32%	11%	13%	21%	45%
Lower Alcohol Wine	26%	29%	22%	33%	30%	15%	19%	20%	42%

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

PURCHASE INTENT OF WINE TYPES

The more involved wine drinking segments of Engaged Explorers and Generation Treaters are more likely to purchase a variety of wine types including lower and non alcoholic wine

Intent to purchase: By Portraits

% who would be likely or very likely to purchase the following wines
Base = All US regular wine drinkers (n=2,000)

		Portraits					
	All US regular wine drinkers	Engaged Explorers	Generation Treaters	Mainstream Suburbans	Social Newbies	Senior Bargain Hunters	Kitchen Casuals
n=	*2,000*	*214*	*200*	*464*	*294*	*451*	*378*
Award Winning	62%	81%	78%	71%	58%	51%	52%
Natural Wine	57%	69%	78%	64%	46%	44%	49%
Established 1870	56%	69%	80%	62%	55%	39%	49%
Organic Grapes	55%	67%	80%	63%	53%	46%	38%
Preservative Free	51%	66%	85%	50%	50%	39%	38%
Environmentally Friendly	50%	65%	76%	58%	48%	38%	36%
Sustainably Produced	48%	70%	81%	59%	35%	36%	31%
Fairtrade	45%	58%	79%	52%	39%	30%	32%
Sulphite Free Wine	44%	59%	77%	47%	42%	31%	32%
USDA Organic	44%	55%	75%	54%	39%	31%	29%
Carbon Neutral	37%	51%	78%	33%	40%	22%	29%
Vegan Wine	30%	44%	76%	27%	33%	13%	16%
Vegetarian Wine	29%	44%	69%	26%	34%	15%	15%
Biodynamic Wine	28%	48%	68%	27%	33%	13%	13%
Non Alcoholic Wine	26%	37%	74%	21%	26%	12%	16%
Lower Alcohol Wine	26%	39%	68%	21%	23%	15%	17%

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

LOWER-ALCOHOL WINE PURCHASE MOTIVATION

The main driver for consumers to choose lower-alcohol wine is the perceived health benefits – including lower calorie – and because of the taste profile; younger drinkers are strongly motivated by the desire to stay in control

Lower-alcohol wine purchase motivation: By gender, age and involvement

% who selected the following statements as motivations to buy lower alcohol wines
Base = Those who have sought to buy lower alcohol wine in the past 6 months or would consider buying it in the future

		Gender		Age			Wine Involvement		
		Male	Female	21-34	35-54	55+	Low	Medium	High
It's better for my health	55%	56%	53%	45%	60%	62%	50%	62%	50%
I enjoy the taste	54%	60%	47%	48%	60%	54%	35%	54%	62%
Less calories than other wines	44%	43%	45%	46%	38%	50%	42%	51%	38%
I like to stay in control	43%	42%	45%	59%	40%	27%	44%	45%	42%
It goes better with food	35%	39%	29%	43%	32%	28%	19%	31%	45%
It gives me fewer headaches	34%	32%	37%	36%	34%	31%	34%	33%	36%
I will be driving	30%	32%	27%	28%	26%	37%	23%	26%	36%
Price is lower than standard wine	29%	30%	28%	28%	30%	31%	31%	35%	24%
I'm on a diet	20%	19%	21%	27%	15%	15%	31%	19%	16%
Most of my friends are drinking it	15%	17%	12%	19%	20%	3%	8%	10%	23%
I like to be seen drinking it	13%	17%	9%	18%	18%	2%	9%	8%	20%
Other	1%	2%	1%	1%	2%	0%	3%	1%	1%
None of these / no opinion	4%	2%	6%	2%	5%	4%	0%	5%	4%
I would not consider drinking lower alcohol wines	1%	1%	2%	1%	1%	1%	0%	1%	2%

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

LOWER-ALCOHOL WINE PURCHASE MOTIVATION

The socially aware segment of Generation Treaters is more motivated to drink lower-alcohol wine to fit in with their peers while the youngest drinkers Social Newbies are motivated by the lower-calorie benefits of lower-alcohol wine

Lower-alcohol wine purchase motivation: By Portraits

% who selected the following statements as motivations to buy lower alcohol wines
Base = Those who have sought to buy lower alcohol wine in the past 6 months or would consider buying it in the future

		Portraits					
		Engaged Explorers	Generation Treaters	Mainstream Suburbans	Social Newbies	Senior Bargain Hunters	Kitchen Casuals
It's better for my health	55%	53%	43%	64%	50%	59%	61%
I enjoy the taste	54%	55%	57%	61%	54%	39%	55%
Less calories than other wines	44%	28%	39%	52%	65%	39%	37%
I like to stay in control	43%	49%	49%	38%	48%	31%	45%
It goes better with food	35%	47%	41%	42%	32%	14%	24%
It gives me fewer headaches	34%	43%	23%	43%	26%	33%	31%
I will be driving	30%	28%	32%	38%	24%	33%	14%
Price is lower than standard wine	29%	29%	26%	27%	26%	42%	30%
I'm on a diet	20%	14%	25%	15%	23%	28%	15%
Most of my friends are drinking it	15%	19%	34%	14%	12%	6%	0%
I like to be seen drinking it	13%	12%	50%	5%	6%	3%	0%
Other	1%	0%	3%	0%	0%	3%	4%
None of these / no opinion	4%	10%	0%	7%	0%	3%	0%
I would not consider drinking lower alcohol wines	1%	2%	0%	2%	3%	0%	0%

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

LOWER-ALCOHOL WINE BARRIERS TO PURCHASE

Despite being more motivated by lower- and non-alcoholic wine overall, younger consumers are also more likely than others to be put off by the 'lack' of alcohol content as a barrier to purchase

Lower-alcohol wine barriers to purchase: By gender, age and involvement

% who selected the following statements as reasons not to buy lower alcohol wines
Base = Those who are aware of lower alcohol wine but have not sought to buy in the past 6 months or would not consider buying it in the future

		Gender		Age			Wine Involvement		
		Male	Female	21-34	35-54	55+	Low	Medium	High
Does not contain enough alcohol to feel an effect	36%	34%	39%	51%	36%	27%	27%	34%	45%
It's not really wine	30%	29%	32%	35%	31%	27%	31%	29%	32%
My favorite wine does not come in a lower alcohol version	29%	29%	28%	33%	20%	33%	24%	27%	34%
I dislike the taste	25%	27%	24%	26%	22%	27%	15%	25%	31%
Lower quality than standard wine	25%	27%	24%	26%	26%	24%	18%	27%	26%
Poor quality wines	23%	29%	19%	25%	22%	24%	16%	23%	27%
Lower alcohol wines are an aberration	17%	20%	15%	22%	15%	16%	17%	19%	15%
Higher price than standard wine	12%	17%	8%	16%	10%	11%	18%	12%	9%
I'm not aware of these products	12%	11%	13%	16%	9%	11%	12%	12%	11%
My friends don't seem to drink it	12%	16%	8%	10%	12%	13%	14%	10%	13%
Difficult to find where I shop for wine	12%	12%	11%	13%	10%	12%	13%	9%	14%
It's not clear from the bottle what it is	10%	12%	9%	14%	11%	8%	7%	9%	13%
They are mass produced wines	10%	11%	10%	13%	9%	10%	4%	10%	13%
I would be embarrassed to be seen drinking it	7%	8%	7%	11%	8%	5%	11%	6%	7%
Other	2%	3%	2%	2%	2%	2%	4%	2%	2%
None of these / no opinion	6%	5%	8%	9%	2%	8%	11%	7%	4%
I can't think of any reason not to buy lower alcohol wines	9%	9%	10%	2%	11%	13%	13%	9%	8%

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

LOWER-ALCOHOL WINE BARRIERS TO PURCHASE

The difficulty in finding lower-alcohol wine and a lack of clear communication on the label prevents Generation Treaters from purchasing these wines, while Engaged Explorers are more likely to dismiss lower-alcohol wines as 'not really wine'

Lower-alcohol wine barriers to purchase: By Portraits

% who selected the following statements as reasons not to buy lower alcohol wines
Base = Those who are aware of lower alcohol wine but have not sought to buy in the past 6 months or would not consider buying it in the future

		Portraits					
		Engaged Explorers	Generation Treaters	Mainstream Suburbans	Social Newbies	Senior Bargain Hunters	Kitchen Casuals
Does not contain enough alcohol to feel an effect	36%	34%	31%	42%	35%	36%	29%
It's not really wine	30%	53%	32%	29%	21%	28%	28%
My favorite wine does not come in a lower alcohol version	29%	38%	37%	33%	17%	26%	23%
I dislike the taste	25%	22%	29%	35%	17%	19%	23%
Lower quality than standard wine	25%	36%	26%	26%	21%	25%	19%
Poor quality wines	23%	22%	26%	29%	26%	19%	14%
Lower alcohol wines are an aberration	17%	24%	27%	18%	15%	17%	10%
Higher price than standard wine	12%	4%	21%	14%	12%	11%	8%
I'm not aware of these products	12%	13%	10%	10%	19%	9%	13%
My friends don't seem to drink it	12%	10%	9%	13%	18%	9%	10%
Difficult to find where I shop for wine	12%	16%	32%	9%	10%	14%	4%
It's not clear from the bottle what it is	10%	17%	35%	6%	13%	8%	4%
They are mass produced wines	10%	16%	11%	11%	6%	13%	4%
I would be embarrassed to be seen drinking it	7%	7%	14%	5%	10%	9%	6%
Other	2%	3%	0%	2%	4%	1%	4%
None of these / no opinion	6%	0%	6%	5%	4%	12%	10%
I can't think of any reason not to buy lower alcohol wines	9%	15%	0%	5%	14%	10%	14%

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

CONTENTS

METHODOLOGY: WINE TYPE OPPORTUNITY REPORT MARKETS

Wine Type Opportunity Index 2018	Wine Type Opportunity Index 2019	Wine Type Opportunity Index 2021
12,000 consumers	16,000 consumers	17,000 consumers
✓ Australia	✓ Australia	✓ Australia
✓ Canada	✓ Belgium	✓ Belgium
✓ Finland	✓ Belgium	✓ Brazil
✓ Germany	✓ Canada	✓ Canada
✓ Ireland	✓ Finland	✓ France
✓ Japan	✓ Germany	✓ Germany
✓ New Zealand	✓ Hong Kong	✓ Ireland
✓ Portugal	✓ Japan	✓ Japan
✓ Sweden	✓ Netherlands	✓ Netherlands
✓ UK	✓ New Zealand	✓ New Zealand
✓ US	✓ Portugal	✓ Portugal
	✓ Spain	✓ South Korea
	✓ Sweden	✓ Spain
	✓ UK	✓ Sweden
	✓ US	✓ Switzerland
		✓ UK
		✓ US

US RESEARCH METHODOLOGY: QUANTITATIVE

- The data was collected in the US since March 2019
- The following wave October 2020 was tracked against March 2019
- 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:

		Mar-19	*Oct-20*
	n=	*2,000*	*2,000*
Gender	Male	50%	51%
	Female	50%	49%
	Total	*100%*	*100%*
Age	21-24	8%	7%
	25-34	22%	21%
	35-44	14%	20%
	45-54	18%	14%
	55-64	18%	15%
	65 and over	21%	22%
	Total	*100%*	*100%*
US Divisions	New England	6%	5%
	Middle Atlantic	14%	15%
	East North Central	13%	11%
	West North Central	4%	7%
	South Atlantic	20%	21%
	East South Central	5%	4%
	West South Central	11%	11%
	Mountain	6%	7%
	Pacific	21%	19%
	Total	*100%*	*100%*

Source: Wine Intelligence, Vinitrac® US, March 19 and 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

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