WINE INTELLIGENCE

US SOLA 2021:

Opportunities for Sustainable and Organic Wine in the US Market

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S ustainable wine

O rganic wine

L ower alcohol wine

A lternative wine

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GENERAL ATTITUDES TOWARDS SUSTAINABILITY

Concerns about climate change and buying local score highly in terms of general attitudes towards sustainability

Australian and Japanese consumers are more likely to expect brands they buy to support social causes, with US consumers more willing to seek out sustainable products in general

General attitudes towards sustainability: Global view

% who agrees with each of the following statements

	Global Weighted Score	Australia	Canada	Japan	Sweden	US	UK
Sample size n=	*9,215*	*1,000*	*1,013*	*1,000*	*500*	*2,000*	*1,000*
I worry about Climate Change and try to minimise my personal impact	**55%**	58%	62%	35%	48%	58%	58%
I try to buy food that is grown or produced locally (in the region where I live)	**54%**	63%	59%	44%	51%	56%	50%
I am willing to pay more for a product that is sustainably produced	**40%**	41%	36%	34%	41%	42%	41%
I always buy sustainable products where possible	**39%**	40%	32%	42%	39%	40%	38%
I expect the brands I buy to support social causes	**39%**	43%	34%	44%	34%	40%	40%
I am willing to give up convenience in return for a product that is sustainably produced	**38%**	41%	35%	30%	36%	41%	40%
I actively eat more / exclusively vegetarian or vegan food	**27%**	28%	26%	16%	29%	31%	29%

Red / Blue: Statistically significantly higher / lower than the global weighted score at a 95% confidence level

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

SOLA GLOBAL SUMMARY

ATTITUDES TOWARDS SUSTAINABILITY IN WINE

Consumers most strongly associate sustainable wine with protecting the environment and rely on official sustainability endorsement for reassurance; they also believe that glass bottles deliver a sustainable form of packaging

Attitudes towards sustainability in wine

% who agrees with each of the following statements
Base = All regular wine drinkers in Australia, Belgium, Canada, Japan, Netherlands, Sweden, Switzerland, UK and US (n≥500)

	Global
Sample size n=	*9,215*
Glass wine bottles are a sustainable form of wine packaging	**55%**
I only trust the sustainability of wines if they have official certification	**43%**
Wine is a more sustainable product compared with other drinks	**42%**
Sustainable wine has less chemicals than other wine	**39%**
I'm willing to pay more for sustainable wine	**37%**
Wine in a bag-in-box is a sustainable form of wine packaging	**35%**
I will always buy sustainable wines when given the choice	**33%**
Sustainable wine is always organically produced	**29%**

Top unprompted associations with sustainable wine

Size of words: Size of font proportional to weight of response
Base = All Australian, Canadian, UK and US regular wine drinkers (n ≥ 1,000)

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

SOLA GLOBAL SUMMARY

ATTITUDES TOWARDS SUSTAINABILITY IN WINE

Consumers in the higher volume wine producer markets of Australia and the US have stronger associations with wine being more sustainable compared with other beverages

Attitudes towards sustainability in wine: Global view

% who agrees with each of the following statements

	Global Weighted Score	Australia	Canada	Japan	Sweden	US	UK
Sample size n=	*9,215*	*1,000*	*1,013*	*1,000*	*500*	*2,000*	*1,000*
Glass wine bottles are a sustainable form of wine packaging	**55%**	61%	53%	44%	50%	55%	63%
I only trust the sustainability of wines if they have official certification	**43%**	47%	41%	35%	40%	44%	46%
Wine is a more sustainable product compared with other drinks	**42%**	46%	37%	44%	29%	45%	40%
Sustainable wine has less chemicals than other wine	**39%**	40%	34%	39%	37%	39%	38%
I'm willing to pay more for sustainable wine	**37%**	37%	32%	27%	39%	40%	39%
Wine in a bag-in-box is a sustainable form of wine packaging	**35%**	35%	31%	30%	37%	37%	36%
I will always buy sustainable wines when given the choice	**33%**	35%	28%	28%	32%	35%	33%
Sustainable wine is always organically produced	**29%**	33%	23%	33%	22%	31%	27%

Red / Blue: Statistically significantly higher / lower than the global weighted score at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, October 2020 (n≥500), Australian, Belgium, Canadian, Japanese, Dutch, Swedish, Swiss, UK and US regular wine drinkers

SOLA GLOBAL SUMMARY

SOLA INDEX SCORE BY WINE TYPE

Organic wine holds its #1 rank in the global wine opportunity index amongst alternative wine types

Stable ranking of SOLA wine type opportunity in 2021 compared to 2019, although declines in the level of the opportunity for the majority of wine types

	Type of wine	Global SOLA wine opportunity index		
		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

Global SOLA wine opportunity index 2021
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

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SOLA US SUMMARY

ATTITUDES TOWARDS SUSTAINABILITY

Concerns about climate change and buying local lead in terms of general attitudes towards sustainability

The move amongst US drinkers towards switching to sustainable, vegetarian and vegan products is led by male, Gen Z and Millennial drinkers

General attitudes towards sustainability

% who agree with each of the following statements

	Global Weighted Score	US
Sample size n=	*9,215*	*2,000*
I worry about Climate Change and try to minimise my personal impact	**55%**	58%
I try to buy food that is grown or produced locally (in the region where I live)	**54%**	56%
I am willing to pay more for a product that is sustainably produced	**40%**	42%
I always buy sustainable products where possible	**39%**	40%
I expect the brands I buy to support social causes	**39%**	40%
I am willing to give up convenience in return for a product that is sustainably produced	**38%**	41%
I actively eat more / exclusively vegetarian or vegan food	**27%**	31%

Source: Wine Intelligence, Vinitrac® 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

SOLA US SUMMARY

ATTITUDES TOWARDS SUSTAINABILITY IN WINE

US consumers most strongly associate sustainable wine with protecting the environment and being high quality

They are also more likely than wine drinkers in other markets to believe wine to be more sustainable than other drinks, and to be willing to pay more for sustainable wine

Top unprompted associations with sustainable wine

Size of words: Size of font proportional to weight of response
Base = All US regular wine drinkers (n=2,000)

Attitudes towards sustainability in wine

% who agree with each of the following statements

	Global Weighted Score	US
Sample size n=	*9,215*	*2,000*
Glass wine bottles are a sustainable form of wine packaging	**55%**	55%
I only trust the sustainability of wines if they have official certification	**43%**	44%
Wine is a more sustainable product compared with other drinks	**42%**	45%
Sustainable wine has less chemicals than other wine	**39%**	39%
I'm willing to pay more for sustainable wine	**37%**	40%
Wine in a bag-in-box is a sustainable form of wine packaging	**35%**	37%
I will always buy sustainable wines when given the choice	**33%**	35%
Sustainable wine is always organically produced	**29%**	31%

Source: Wine Intelligence, Vinitrac® 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

SOLA US SUMMARY

ALTERNATIVE WINE OPPORTUNITY INDEX

Organic wine remains the #1 sustainable / alternative wine type in the US market

- Unlike in other key wine markets, where there has been a general increase in awareness of SOLA wines, there has been static or declining awareness of these wine in the US, along with decreasing purchase and affinity rates for some types
- Higher involved wine drinkers in the US have a significantly high awareness of SOLA wine types whilst female, older and lower involved wine drinkers are less motivated to seek to purchase SOLA wines despite a stronger affinity for SOLA wines amongst female drinkers

US Alternative Wine Opportunity Index 2021

	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%	47.7	51.3	=
2nd	Sustainably produced wine	24%	26%	75%	68%	45.3	46.9	=
3rd	Environmentally friendly wine	24%	30%	69%	61%	42.8	46.9	=
4th	Fairtrade wine	18%	27%	70%	60%	40.0	44.0	=
5th	Preservative free wine	17%	25%	67%	56%	37.8	42.0	1 ⬆
6th	Wine from a carbon neutral winery	11%	33%	64%	58%	37.5	39.3	2 ⬆
7th	Sulphite free wine	23%	20%	61%	52%	36.7	42.2	-2 ⬇
8th	Orange / skin contact wine	8%	34%	55%	51%	32.9	40.6	-1 ⬇
9th	Biodynamic wine	7%	35%	53%	40%	29.2	34.1	=
10th	Lower alcohol wine	29%	16%	36%	31%	28.1	31.6	2 ⬆
11th	Vegetarian wine	7%	32%	44%	40%	27.4	33.9	-1 ⬇
12th	Vegan wine	12%	23%	43%	35%	25.8	32.5	-1 ⬇
13th	Non-alcoholic wine	30%	10%	22%	15%	20.4	26.5	=

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

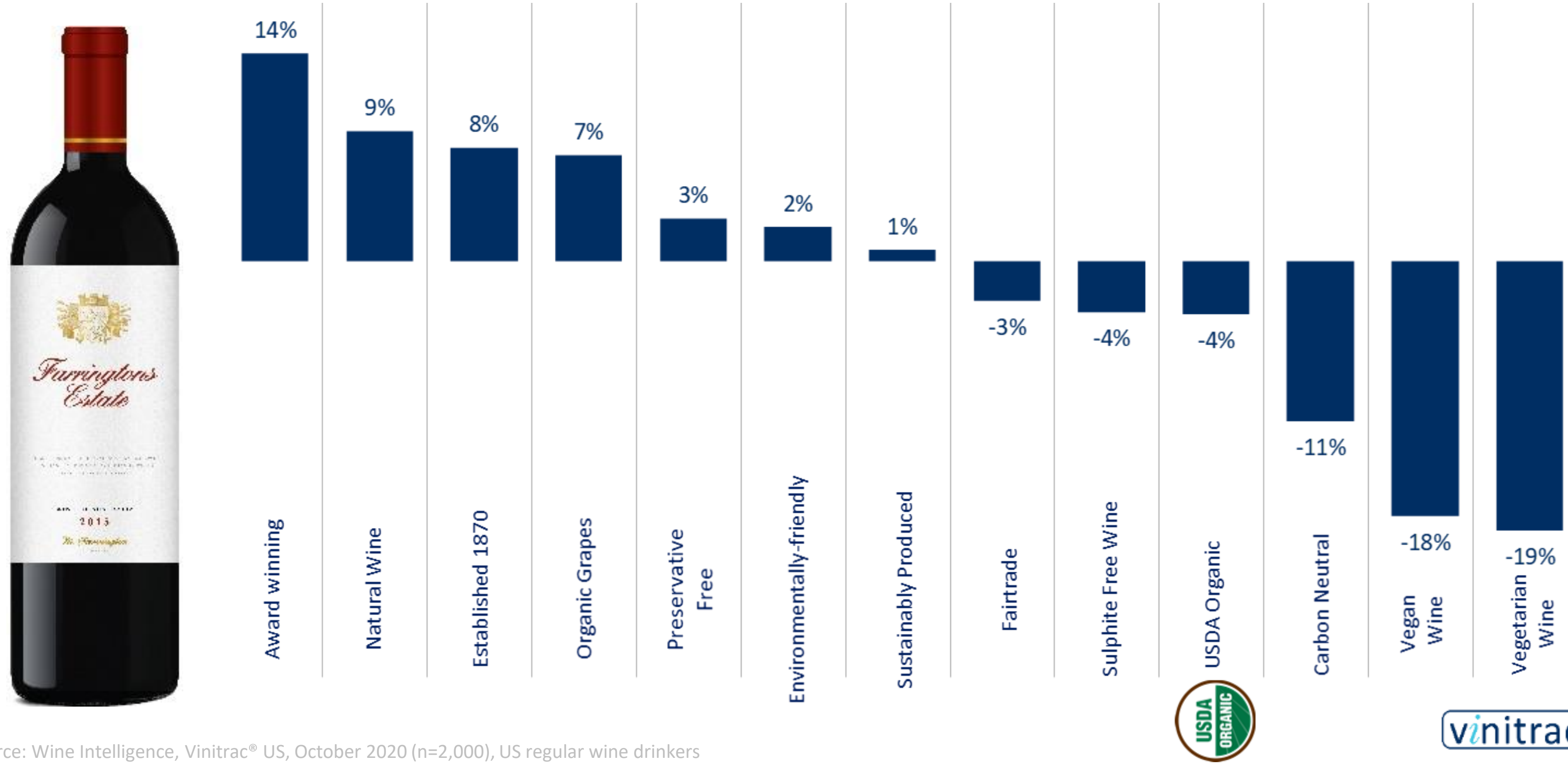
SOLA US SUMMARY

INTENT TO PURCHASE COMPARED WITH CONTROL SAMPLE

Award-winning and heritage are habitually strong wine purchase cues; note that in consumers' minds wine is positively associated with being 'natural', whether or not it meets the wine industry's internal definitions

Stating that a wine is made with organic grapes appears to drive purchase more than wine showing the USDA organic wine logo

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



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

SOLA US SUMMARY

ALTERNATIVE WINES ASSOCIATIONS

Organic wine is strongly associated with being better for one's health and less processed by US wine drinkers

- Fairtrade and sustainable wines are strongly associated with being more ethically responsible
- US consumers deem organic wine as more expensive, less processed and better for one's health compared with other alternative wine types

Alternative wine associations

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

	Organic Wine	Fairtrade Wine	Biodynamic Wine	Sustainable Wine
Sample size n=	*2,000*	*2,000*	*2,000*	*2,000*
More expensive	36%	21%	22%	24%
More environmentally-friendly	31%	16%	16%	37%
More ethically responsible	21%	31%	11%	31%
It is less processed	25%	10%	13%	13%
Better for my health	28%	8%	13%	12%
Higher in quality	21%	11%	10%	13%
Tastes better	15%	10%	8%	11%
More prestigious	12%	10%	9%	11%
Better with food	12%	10%	9%	11%
Lower in calories	11%	6%	9%	7%
Lower in alcohol	7%	8%	9%	7%
Tastes worse	7%	7%	10%	6%
None of these	20%	28%	38%	22%

Green = Relative strength within each wine type
Red = Relative weakness within each wine type

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

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ATTITUDES TOWARDS SUSTAINABILITY IN GENERAL

Concerns about climate change and buying local lead in terms of the general attitudes towards sustainability, with a move amongst US drinkers towards switching to sustainable, vegetarian and vegan products

General attitudes towards sustainability

% who agrees with each of the following statements

Base = All regular wine drinkers in Australia, Belgium, Canada, Japan, Netherlands, Sweden, Switzerland, UK and US (n≥500)

	Global Weighted Score	US
Sample size n=	*9,215*	*2,000*
I worry about Climate Change and try to minimise my personal impact	**55%**	58%
I try to buy food that is grown or produced locally (in the region where I live)	**54%**	56%
I am willing to pay more for a product that is sustainably produced	**40%**	42%
I always buy sustainable products where possible	**39%**	40%
I expect the brands I buy to support social causes	**39%**	40%
I am willing to give up convenience in return for a product that is sustainably produced	**38%**	41%
I actively eat more / exclusively vegetarian or vegan food	**27%**	31%

Red / Blue: Statistically significantly higher / lower than the global weighted score at a 95% confidence level

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

ATTITUDES TOWARDS SUSTAINABILITY IN GENERAL

There is a significantly higher connection with sustainability in general amongst high involved wine drinkers, but also for male, Gen Z and Millennial drinkers

wine intelligence

General attitudes towards sustainability: By gender, age and involvement

% who agrees with each of 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 worry about Climate Change and try to minimise my personal impact	58%	59%	57%	62%	62%	51%	45%	56%	73%
I try to buy food that is grown or produced locally (in the region where I live)	56%	58%	54%	56%	59%	53%	40%	52%	75%
I am willing to pay more for a product that is sustainably produced	42%	47%	38%	55%	52%	23%	22%	38%	66%
I am willing to give up convenience in return for a product that is sustainably produced	41%	45%	37%	53%	50%	24%	22%	36%	66%
I expect the brands I buy to support social causes	40%	43%	37%	54%	47%	24%	21%	35%	64%
I always buy sustainable products where possible	40%	45%	36%	53%	50%	21%	21%	35%	65%
I actively eat more / exclusively vegetarian or vegan food	31%	35%	27%	42%	41%	14%	13%	28%	52%

: 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.

ATTITUDES TOWARDS SUSTAINABILITY IN WINE

US consumers most strongly associate sustainable wine with protecting the environment and being high quality; they are also more likely to believe wine to be more sustainable than other drinks and to be willing to pay more for sustainable wine

Top unprompted associations with sustainable wine

Size of words: Size of font proportional to weight of response
Base = All US regular wine drinkers (n=2,000)

Attitudes towards sustainability in wine: Global view

% who agrees with each of the following statements
Base = All regular wine drinkers in Australia, Belgium, Canada, Japan, Netherlands, Sweden, Switzerland, UK and US (n≥500)

	Global Weighted Score	US
Sample size n=	*9,215*	*2,000*
Glass wine bottles are a sustainable form of wine packaging	**55%**	55%
I only trust the sustainability of wines if they have official certification	**43%**	44%
Wine is a more sustainable product compared with other drinks	**42%**	45%
Sustainable wine has less chemicals than other wine	**39%**	39%
I'm willing to pay more for sustainable wine	**37%**	40%
Wine in a bag-in-box is a sustainable form of wine packaging	**35%**	37%
I will always buy sustainable wines when given the choice	**33%**	35%
Sustainable wine is always organically produced	**29%**	31%

Red / Blue: Statistically significantly higher / lower than the global weighted score at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, October 2020 (n≥500), Australian, Belgium, Canadian, Japanese, Dutch, Swedish, Swiss, UK and US regular wine drinkers

ATTITUDES TOWARDS SUSTAINABILITY IN WINE

There is a significantly higher connection with sustainable wine amongst higher involved wine drinkers, but also for both male, Gen Z and Millennial drinkers

Attitudes towards sustainability in wine: By gender, age and involvement

% who agrees with each of 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*
Glass wine bottles are a sustainable form of wine packaging	55%	58%	51%	57%	59%	50%	39%	53%	70%
Wine is a more sustainable product compared with other drinks	45%	49%	42%	52%	52%	34%	26%	40%	70%
I only trust the sustainability of wines if they have official certification	44%	47%	40%	57%	49%	29%	22%	40%	67%
I'm willing to pay more for sustainable wine	40%	44%	35%	53%	51%	20%	20%	35%	65%
Sustainable wine has less chemicals than other wine	39%	43%	35%	48%	47%	26%	19%	35%	64%
Wine in a bag-in-box is a sustainable form of wine packaging	37%	41%	32%	44%	44%	24%	23%	32%	56%
I will always buy sustainable wines when given the choice	35%	40%	30%	46%	46%	17%	14%	31%	59%
Sustainable wine is always organically produced	31%	37%	25%	44%	40%	13%	11%	26%	58%

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

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CALCULATING THE SOLA WINE OPPORTUNITY INDEX

Using four measures (awareness, intent to purchase, purchase consideration and affinity) an index is created to show which alternative wine types have the strongest market opportunities

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

Purchase intent

% who have specifically sought to buy the type of wine in the past 6 months

Consideration

% who would consider buying the type of wine in the future

Awareness

% who are aware of the types of wine

Affinity

% who think the type of wine is right for people like them

SOLA Opportunity Index

Increase in rank position since 2019

Decrease in rank position since 2019

No change in rank position since 2019

ALTERNATIVE WINE OPPORTUNITY INDEX BY WINE TYPE 2021

Stable ranking of SOLA wine type opportunity in 2021 compared to 2019, although declines in the level of the opportunity for the majority of wine types

US Alternative Wine Opportunity Index 2021

	Type of wine	US SOLA wine opportunity index		
		2021 weighted opportunity index	2019 score difference	2019 rank difference
1st	Organic wine	47.7	-3.6	=
2nd	Sustainably produced wine	45.3	-1.6	=
3rd	Environmentally friendly wine	42.8	-4.1	1↑
4th	Fairtrade wine	40.0	-4.0	-1↓
5th	Preservative free wine	37.8	-4.2	=
6th	Wine from a carbon neutral winery	37.5	-1.8	=
7th	Sulphite free wine	36.7	-5.5	=
8th	Orange / skin contact wine	32.9	-7.7	=
9th	Biodynamic wine	29.2	-4.9	=
10th	Lower alcohol wine	28.1	-3.5	=
11th	Vegetarian wine	27.4	-6.5	=
12th	Vegan wine	25.8	-6.7	=
13th	Non-alcoholic wine	20.4	-6.1	=

= top 5 wine types per measure

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

ALTERNATIVE WINE OPPORTUNITY INDEX 2021

Organic wine remains the #1 sustainable / alternative wine type in the US market opportunity index in the US

US Alternative Wine Opportunity Index 2021

	Type of wine	Awareness (Base = All sample)	Sought to purchase (Base = Those who are aware of the following types of wine)	Future purchase consideration (Base = Those who are aware of the following types of wine)	Affinity (Base = Those who are aware of the following types of wine)	2021 opportunity index	2019 opportunity index	2019 rank difference
1st	Organic wine	44%	28%	67%	56%	47.7	51.3	=
2nd	Sustainably produced wine	24%	26%	75%	68%	45.3	46.9	=
3rd	Environmentally friendly wine	24%	30%	69%	61%	42.8	46.9	=
4th	Fairtrade wine	18%	27%	70%	60%	40.0	44.0	=
5th	Preservative free wine	17%	25%	67%	56%	37.8	42.0	1 ↑
6th	Wine from a carbon neutral winery	11%	33%	64%	58%	37.5	39.3	2 ↑
7th	Sulphite free wine	23%	20%	61%	52%	36.7	42.2	-2 ↓
8th	Orange / skin contact wine	8%	34%	55%	51%	32.9	40.6	-1 ↓
9th	Biodynamic wine	7%	35%	53%	40%	29.2	34.1	=
10th	Lower alcohol wine	29%	16%	36%	31%	28.1	31.6	2 ↑
11th	Vegetarian wine	7%	32%	44%	40%	27.4	33.9	-1 ↓
12th	Vegan wine	12%	23%	43%	35%	25.8	32.5	-1 ↓
13th	Non-alcoholic wine	30%	10%	22%	15%	20.4	26.5	=

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

ALTERNATIVE WINE OPPORTUNITY INDEX

Unlike in other key markets, where there has been an increase in awareness of SOLA wines, there has been a decrease in awareness of these wine in the US, along with decreasing purchase and affinity rates

US Alternative Wine Opportunity Index: Tracking

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

Higher involved wine drinkers in the US have a significantly high awareness of SOLA wine types

Alternative wines awareness: Gender, age and wine 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%
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 SOUGHT TO PURCHASE

Female, older and lower involved wine drinkers are less motivated to seek to purchase SOLA alternative wine types

Alternative wines sought to purchase

% 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%
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 CONSIDERATION

There are indications that types of regular wine drinkers may consider purchasing SOLA alternative wines in the future

wine intelligence

Alternative wines consideration

% who would consider purchasing the following types of wine in the future
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	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%
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

vinitrac

ALTERNATIVE WINES AFFINITY

There is stronger affinity for sustainably produced wine amongst female drinkers

Alternative wines affinity

% 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%
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

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PURCHASE INTENT: BASED ON CLAIMS ON WINE LABELS

Bottle with **no claim** tested against bottles shown **with claims** – the claims were not highlighted in this test and were shown in a randomized order to avoid bias

Bottles tested in the US:

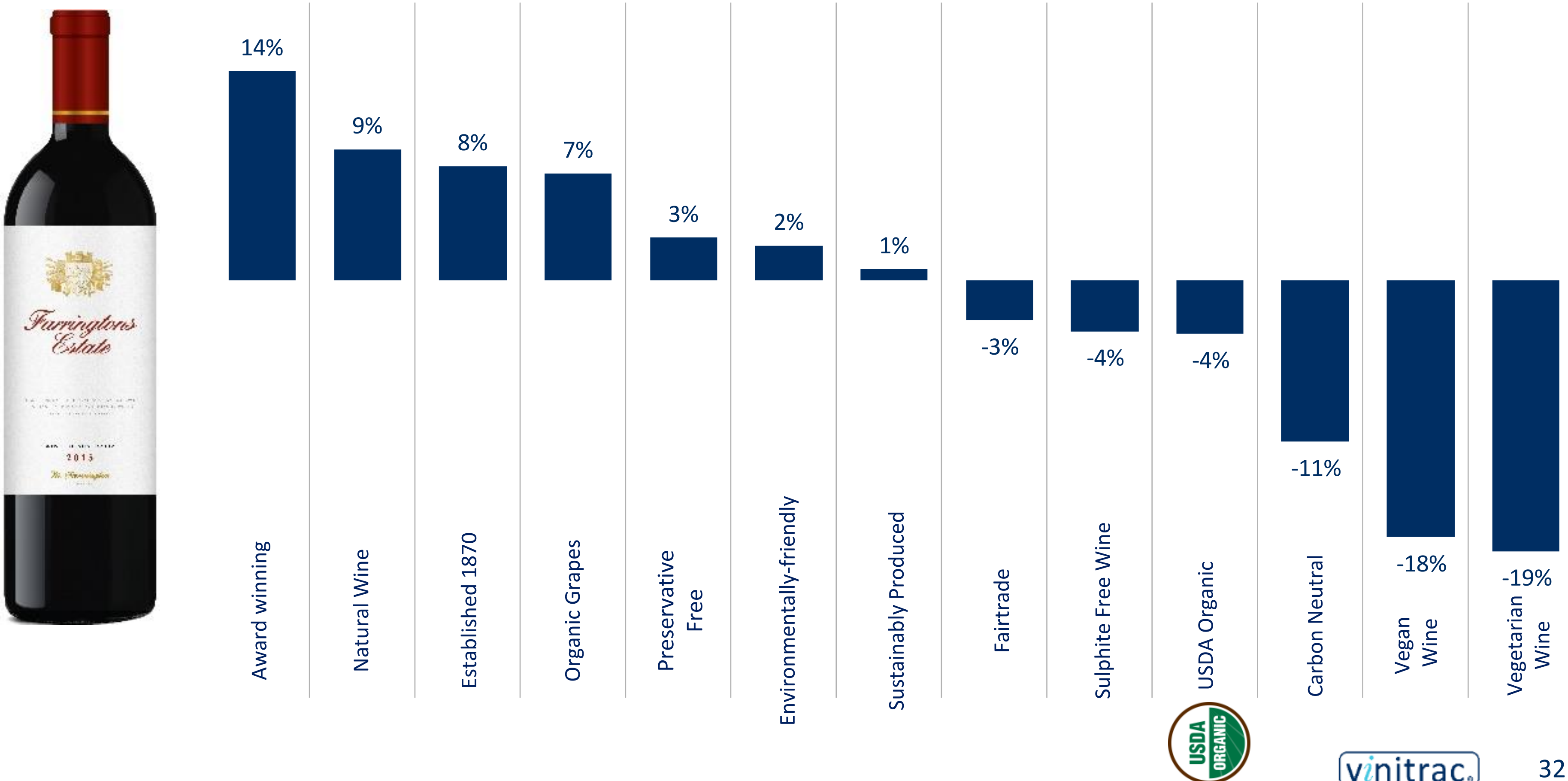
No Claim Bottle
Wine made from organic grapes
Fairtrade Wine
Lower Alcohol wine
Sulphite Free Wine
Cannabis Infused
Award Winning Winery
Sustainably Produced
Non-Alcoholic Wine
Environmentally Friendly
USDA organic logo
Natural Wine
Established 1870
Biodynamic Wine
Carbon-Neutral Winery
Vegan Wine
Preservative Free
Vegetarian Wine

NET PURCHASE INTENT OF WINE TYPES

Award-winning and heritage are strong wine purchase cues; note that in consumers' minds wine is positively associated with being 'natural', whether or not it meets the wine industry's internal definitions

Net intent to purchase: Net score compared with 'no claim'

% 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 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

Younger consumers and those with a higher involvement with wine have a higher net purchase intent for SOLA and alternative wines

Intent to purchase: By gender and age

% 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%

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

NET PURCHASE INTENT OF WINE TYPES

Stating that a wine is made with organic grapes appears to drive purchase more than wine showing the USDA organic wine logo

Net 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%	↓

* Tested as 'Organic Wine' in 2019
↑ / ↓ : 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

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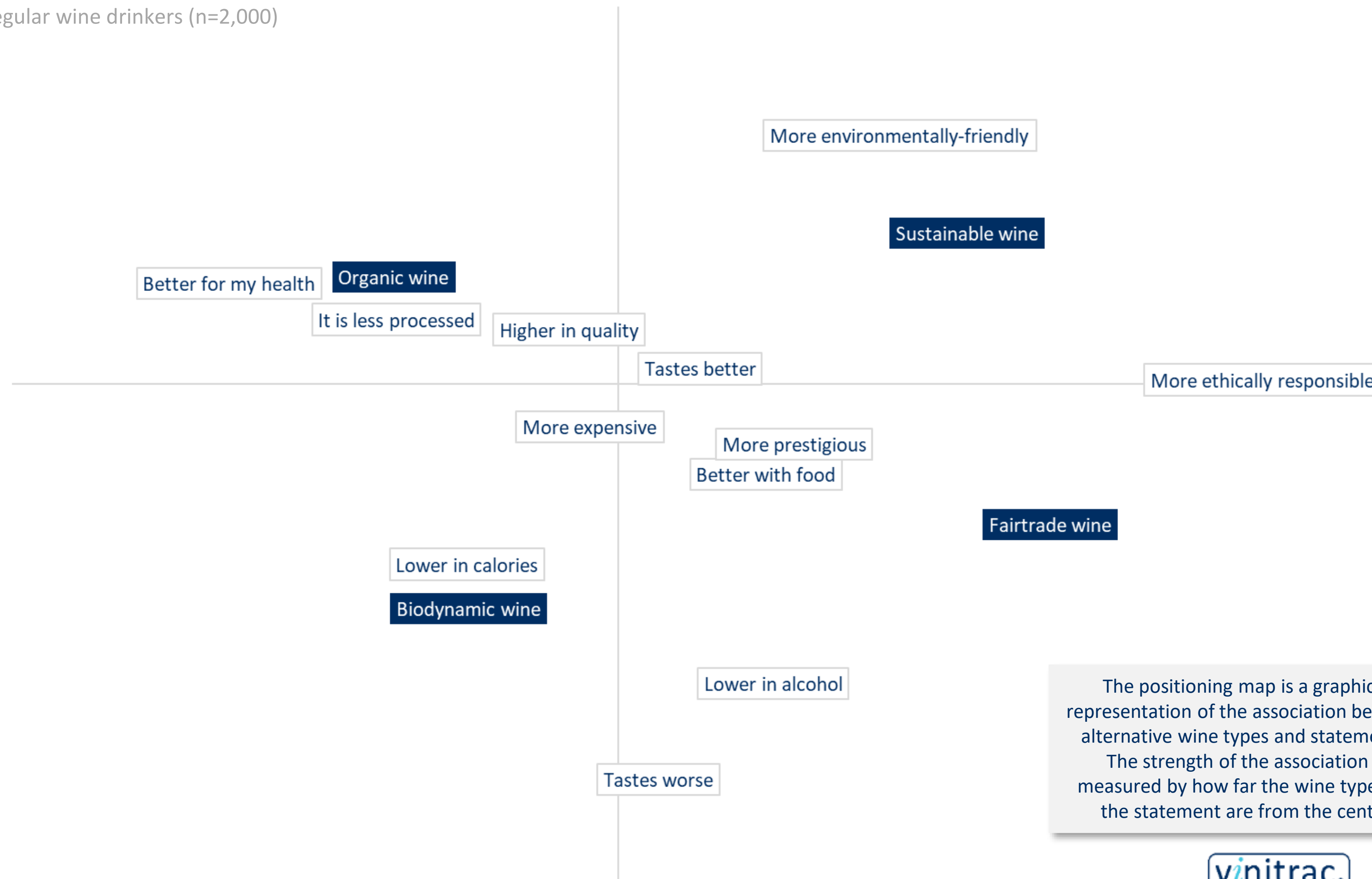
ALTERNATIVE WINES ASSOCIATIONS

Organic wine is strongly associated with being better for one's health and less processed by US wine drinkers

Alternative wine associations: Imagery map

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



The positioning map is a graphical representation of the association between alternative wine types and statements. The strength of the association is measured by how far the wine type and the statement are from the centre

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

ALTERNATIVE WINES ASSOCIATIONS

Fairtrade and sustainable wines are strongly associated with being more ethically responsible compared with other wine types

Alternative wine associations

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

	Organic Wine	Fairtrade Wine	Biodynamic Wine	Sustainable Wine
Sample size n=	*2,000*	*2,000*	*2,000*	*2,000*
More expensive	36%	21%	22%	24%
More environmentally-friendly	31%	16%	16%	37%
More ethically responsible	21%	31%	11%	31%
It is less processed	25%	10%	13%	13%
Better for my health	28%	8%	13%	12%
Higher in quality	21%	11%	10%	13%
Tastes better	15%	10%	8%	11%
More prestigious	12%	10%	9%	11%
Better with food	12%	10%	9%	11%
Lower in calories	11%	6%	9%	7%
Lower in alcohol	7%	8%	9%	7%
Tastes worse	7%	7%	10%	6%
None of these	20%	28%	38%	22%

Green = Relative strength within each wine type
Red = Relative weakness within each wine type

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

ALTERNATIVE WINES ASSOCIATIONS

US consumers deem organic wine as more expensive, less processed and better for one's health compared with other alternative wine types

Alternative wine associations

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

	Organic Wine	Fairtrade Wine	Biodynamic Wine	Sustainable Wine
Sample size n=	*2,000*	*2,000*	*2,000*	*2,000*
More expensive	36%	21%	22%	24%
More environmentally-friendly	31%	16%	16%	37%
More ethically responsible	21%	31%	11%	31%
It is less processed	25%	10%	13%	13%
Better for my health	28%	8%	13%	12%
Higher in quality	21%	11%	10%	13%
Tastes better	15%	10%	8%	11%
More prestigious	12%	10%	9%	11%
Better with food	12%	10%	9%	11%
Lower in calories	11%	6%	9%	7%
Lower in alcohol	7%	8%	9%	7%
Tastes worse	7%	7%	10%	6%
None of these	20%	28%	38%	22%

Top 3 associations

Red / Orange Statistically significantly higher than 3 or more / 2 wine types at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, October 2020 (n=2,000), US regular wine drinkers

ORGANIC WINE ASSOCIATIONS

Organic wine associations: By gender and age

% who associate organic wine with 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*
More expensive	36%	33%	38%	34%	35%	37%	35%	35%	37%
More environmentally-friendly	31%	28%	33%	34%	32%	26%	25%	31%	35%
Better for my health	28%	25%	32%	34%	29%	23%	20%	30%	32%
It is less processed	25%	24%	27%	27%	26%	24%	17%	27%	29%
Higher in quality	21%	21%	21%	28%	22%	13%	12%	20%	28%
More ethically responsible	21%	21%	21%	25%	22%	16%	17%	19%	28%
Tastes better	15%	16%	14%	20%	19%	8%	11%	13%	21%
Better with food	12%	15%	10%	18%	13%	8%	7%	11%	19%
More prestigious	12%	13%	12%	16%	14%	9%	7%	11%	18%
Lower in calories	11%	13%	8%	16%	11%	6%	8%	9%	16%
Tastes worse	7%	8%	6%	8%	9%	5%	4%	7%	9%
Lower in alcohol	7%	8%	7%	11%	8%	4%	4%	7%	11%
None of these	20%	20%	19%	10%	15%	31%	31%	19%	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

FAIRTRADE WINE ASSOCIATIONS

Fairtrade wine associations: By gender and age

% who associate Fairtrade wine with 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*
More ethically responsible	31%	27%	36%	31%	32%	31%	27%	32%	32%
More expensive	21%	21%	20%	20%	21%	21%	22%	20%	21%
More environmentally-friendly	16%	15%	17%	19%	19%	12%	11%	14%	24%
Higher in quality	11%	11%	10%	16%	13%	5%	4%	9%	19%
Tastes better	10%	12%	8%	13%	13%	4%	6%	9%	15%
It is less processed	10%	11%	9%	15%	11%	5%	6%	9%	15%
Better with food	10%	13%	7%	14%	13%	4%	6%	9%	15%
More prestigious	10%	11%	9%	14%	11%	7%	6%	9%	16%
Better for my health	8%	10%	6%	11%	9%	4%	4%	6%	14%
Lower in alcohol	8%	10%	5%	13%	9%	2%	4%	6%	13%
Tastes worse	7%	9%	5%	9%	9%	4%	4%	8%	9%
Lower in calories	6%	8%	3%	8%	8%	2%	3%	4%	10%
None of these	28%	27%	30%	19%	23%	41%	42%	30%	15%

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

SUSTAINABLE WINE ASSOCIATIONS

Sustainable wine associations: By gender and age

% who associate sustainable wine with 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*
More environmentally-friendly	37%	34%	40%	35%	40%	35%	30%	37%	41%
More ethically responsible	31%	30%	32%	35%	32%	28%	25%	33%	33%
More expensive	24%	22%	25%	24%	23%	24%	25%	24%	22%
Higher in quality	13%	12%	13%	18%	15%	7%	7%	11%	19%
It is less processed	13%	14%	12%	16%	15%	9%	9%	12%	18%
Better for my health	12%	14%	9%	14%	13%	8%	7%	11%	16%
Tastes better	11%	11%	11%	15%	14%	6%	4%	9%	19%
Better with food	11%	12%	9%	13%	13%	6%	5%	10%	16%
More prestigious	11%	11%	10%	15%	13%	5%	6%	10%	16%
Lower in calories	7%	9%	5%	10%	9%	2%	4%	5%	12%
Lower in alcohol	7%	9%	5%	9%	9%	4%	4%	7%	10%
Tastes worse	6%	9%	4%	9%	7%	4%	7%	5%	9%
None of these	22%	21%	23%	12%	18%	33%	33%	23%	12%

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

BIODYNAMIC WINE ASSOCIATIONS

Biodynamic wine associations: By gender and age

% who associate biodynamic wine with 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*
More expensive	22%	23%	21%	22%	21%	23%	20%	22%	24%
More environmentally-friendly	16%	17%	15%	21%	19%	9%	7%	15%	23%
It is less processed	13%	13%	13%	16%	15%	8%	7%	13%	17%
Better for my health	13%	14%	12%	19%	14%	8%	8%	12%	19%
More ethically responsible	11%	13%	9%	16%	12%	6%	5%	10%	18%
Higher in quality	10%	11%	9%	17%	10%	5%	4%	10%	14%
Tastes worse	10%	11%	8%	12%	11%	7%	7%	9%	12%
Better with food	9%	11%	6%	14%	10%	4%	3%	8%	15%
Lower in calories	9%	12%	6%	14%	10%	4%	4%	8%	15%
Lower in alcohol	9%	9%	8%	12%	10%	5%	5%	8%	12%
More prestigious	9%	11%	7%	13%	10%	4%	5%	8%	13%
Tastes better	8%	9%	7%	10%	11%	4%	3%	7%	14%
None of these	38%	34%	42%	24%	34%	54%	55%	39%	24%

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

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METHODOLOGY: SOLA OPPORTUNITY REPORT MARKETS

The data collected in each market is representative of wine drinkers in that market

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

US RESEARCH METHODOLOGY: QUANTITATIVE

- The data has been 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

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"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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