



A division of the IWSR Group

Singapore

Wine Landscapes 2022



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Wine Intelligence Viewpoint

Singapore is an expat-led wine market, where import costs and high tax make wine an expensive commodity. However, there is evidence of a maturing market, with consumer involvement and spend up and a broadening base of wine drinkers.

Wine volumes are up over the longer-run, driven by strong growth in sparkling wine.

Spend is also increasing, especially in informal occasions. The COVID-19 lockdowns encouraged consumers to switch their spend to wine at home and trade up. This change in behaviour appears to be sustained as restrictions relax.

Drinking less but drinking better is a strong theme in the market, with evidence of greater involvement in the category by Singaporean wine drinkers.

The proportion of Millennial and Gen Z wine drinkers is stable, unlike in some other markets where we see younger consumers leaving the category.

The current economic climate is not top of mind, but a prolonged global recession could impact spend in the market.

Political turmoil in Hong Kong presents opportunities for Singapore, with capital and workforce relocating to the market. The market is in a great position to become a wine hub for the region.

Opportunities

- Sparkling wine
- Growing involvement
- Higher spend
- Hong Kong politics
- Younger drinkers sticking with the category

Threats

- Global economy
- High domestic prices limit reach

Management Summary

Singapore Wine Landscapes
2022

Management Summary

Key takeaways

1. Volumes up over longer run, but recent decline in still wine

Wine volumes grew steadily from 2016 to 2021 across all wine types and are forecast to have similar growth over the next five years. However, between 2020 and 2021, there was a drop in still wine volumes for still wine, causing an overall decline in the total wine market. This could be because of an off-premise sales fall off as COVID restrictions reduce.

2. Spend is up across informal occasions

There is evidence of premiumisation in the market, with spend increasing across a range of occasions in the on- and off-trade, especially informal get-togethers. The pandemic has been a contributing factor, with wine drinkers growing accustomed to spending a bit more at home and continuing this behaviour as on-trade drinking returned.

3. Involvement is up, but knowledge has decreased

The proportion of Singaporean wine drinkers who are highly involved in the category has grown since 2020, yet the knowledge index score has decreased over the same period.

4. French wine in decline

French wine volumes have been broadly stable for the past five years, but falling behind relative to other countries, including Italy, Australia and Spain. Awareness of France as a wine producing country, and recalled consumption of French wine, have both declined since 2020.

Management Summary

Key takeaways

5. High online penetration in the market

Channel usage has remained relatively stable since 2020, with only supermarkets and travel-related channels losing market share. Singapore has high online penetration, with just over half of semi-annual wine drinkers buying wine online. Use of online is highest among more frequent wine drinkers, reaching over two-thirds.

6. Canned wine usage increasing

Singaporean wine drinkers tend to hold more positive views of natural cork closures, but there has been a notable shift, with consumers now more likely to like buying wines with both screw-cap and synthetic cork tops.

7. Hong Kong politics provides opportunities

Trade experts interviewed noted how political turmoil in Hong Kong has provided opportunities in Singapore. Capital and expat workforces are relocating to the market, potentially boosting future wine consumption and allowing the market to occupy a position as a gateway to the region for wine.

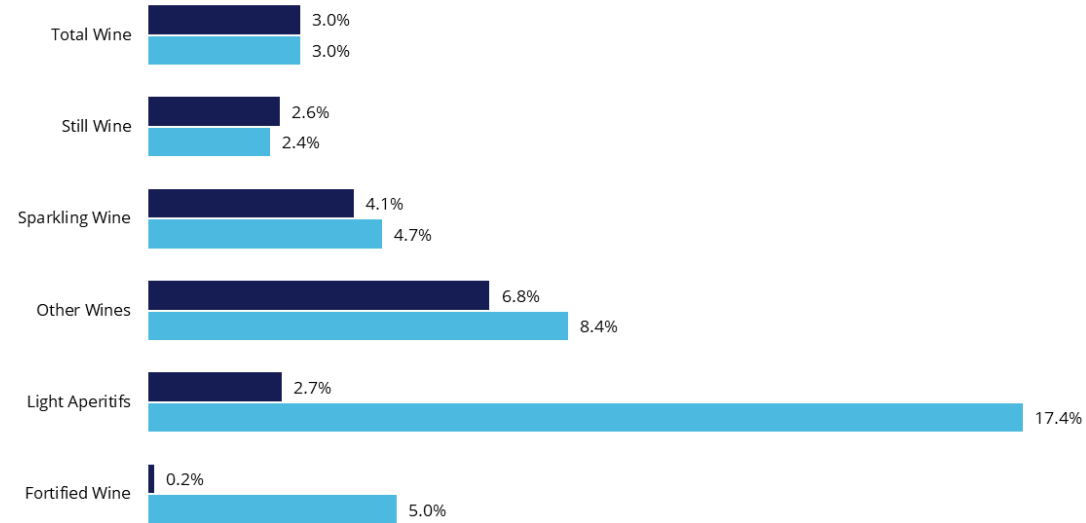
1. Volumes up over longer run, but recent decline in still wine

Wine volumes grew steadily from 2016 to 2021 across all wine types and are forecast to have similar growth over the next five years

However, between 2020 and 2021, there was a drop in still wines volumes for still wine, causing an overall decline in the total wine market. This could be because of an off-premise sales fall off as COVID restrictions reduce

Historic and forecast volume growth by country of origin

Five-year CAGR %



Total wine volumes by category

'000s 9-litre cases

	2020	2021
Total Wine	1,515.6	1,470.5
Still Wine	1,278.2	1,221.5
Sparkling Wine	144.9	153.6
Other Wines	84.0	84.8
Light Aperitifs	5.0	6.8
Fortified Wine	3.5	3.8

Source: IWSR

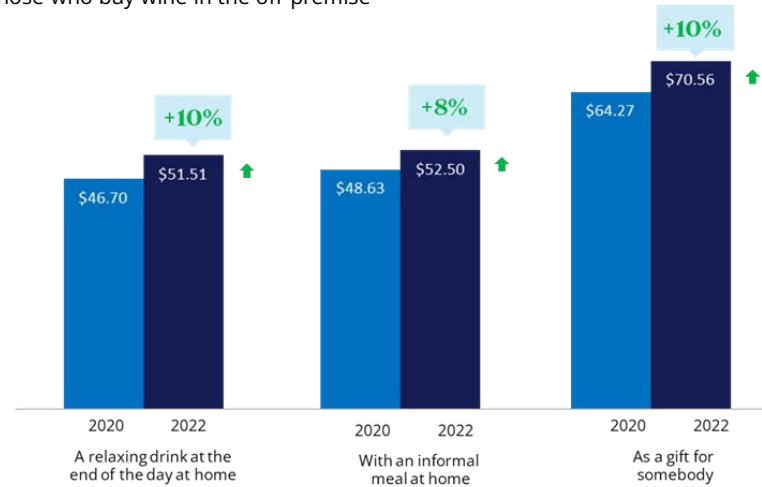
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There is evidence of premiumisation in the market, with spend increasing across a range of occasions in the on- and off-trade, especially informal get-togethers

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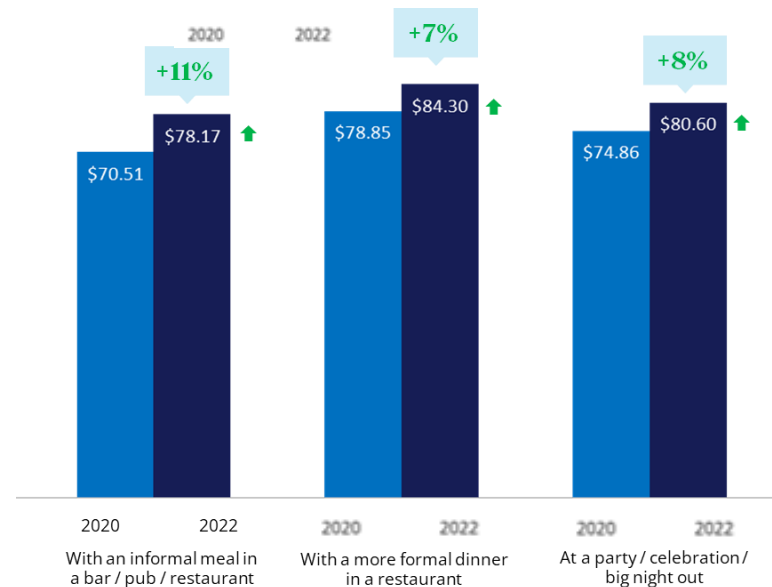
Off-premise: Typical spend per bottle by occasion

Base = Those who buy wine in the off-premise



On-premise: Typical spend per occasion

Base = Those who buy wine in the on-premise



↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Q: What do market experts say?

“When COVID first started, we saw a lot of people buying wines and drinking at home. They're buying more expensive wines than they used to because that's where they can spend their money. Now, even though we are moving back to the norm, spending power and buying fine wines hasn't really dropped at all.”

Wine marketer, Singapore

3. Involvement is up, but knowledge has decreased

The proportion of Singaporean wine drinkers who are highly involved in the category has grown since 2020, yet the knowledge index score has decreased over the same period

Q: What do market experts say?

"We saw new converts to wine during the lockdown period because there wasn't anything else for people to do, so they started drinking wine."

Wine importer, Singapore

Wine involvement: Tracking

Base = All Singaporean semi-annual wine drinkers (n=600)

	2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
				vs. '20	vs. '21
High involvement	35%	42%	43%	↑	→
Medium involvement	44%	41%	39%	→	→
Low involvement	21%	16%	18%	→	→

Wine Knowledge Index: Tracking

Base = All Singaporean semi-annual wine drinkers (n=600)

	2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
				vs. '20	vs. '21
Knowledge Index	27.1	26.0	23.8	↓	↓

Wine knowledge index (0-100) is calculated based on consumer-reported awareness of wine-growing regions and wine brands.

*Wine knowledge index is the 'objective' measurement of consumer knowledge about wine.

-3.2
Index
change

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

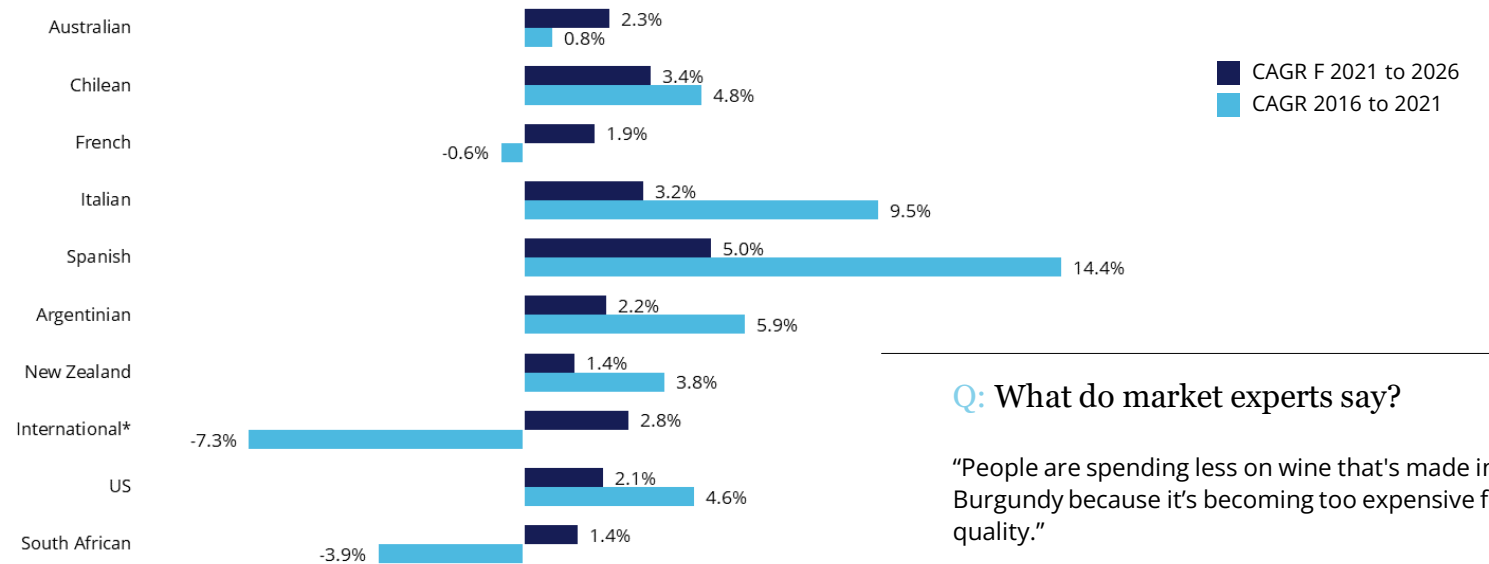
4. French wine in decline

French wine volumes have been broadly stable for the past five years, but falling behind relative to other countries, including Italy, Australia and Spain

Awareness of France as a wine producing country, and recalled consumption of French wine, have both declined since 2020

Historic and forecast volume growth by country of origin

Five-year CAGR %



Q: What do market experts say?

“People are spending less on wine that's made in Burgundy because it's becoming too expensive for the quality.”

Sommelier, Singapore

Country of origin consumption: Top 5

% who have drunk wine from the following places in the past six months

	2020	2022	Tracking
Australia	53%	49%	→
France	46%	39%	↓
Italy	28%	20%	↓
New Zealand	23%	20%	→
Chile	20%	19%	→

*International refers to wine where grapes are from multiple countries of origin

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

5. High online penetration in the market

Channel usage has remained relatively stable since 2020, with only supermarkets and travel-related channels losing market share

Singapore has high online penetration, with just over half of semi-annual wine drinkers buying wine online. Use of online is highest among more frequent wine drinkers, reaching over two-thirds

Wine-buying channel usage: Tracking

% who have bought wine from the following channels in the past six months

Base = All Singaporean semi-annual wine drinkers (n=600)

Ranking '22		2020	2021	2022	Tracking	
		(n=600)	(n=600)	(n=600)	vs. '20	vs. '21
1	Supermarkets	62%	55%	54%	↓	→
2	Hypermarkets	36%	38%	35%	→	→
3	Wine shop / Shop specialised in alcohol	39%	36%	34%	→	→
4	From a supermarket / hypermarket website	n/a	31%	30%	n/a	→
5=	From an online retailer	n/a	25%	27%	n/a	→
5=	Shopping malls	25%	26%	27%	→	→
7	Duty-free (eg at airport)	50%	22%	21%	↓	→
8	From a delivery app	n/a	14%	17%	n/a	→
9	Convenience store / Corner shop / Ordinary grocery shop	18%	15%	16%	→	→
10	Discount supermarkets	13%	13%	15%	→	→
11	Directly from broker, importer or wholesaler	12%	12%	12%	→	→
12=	Boutique supermarket	15%	12%	11%	→	→
12=	Tobacco and alcohol shops	11%	10%	11%	→	→
14	From a wine club or membership organisation	n/a	12%	9%	n/a	→
15	From a winery during a visit	n/a	13%	8%	n/a	↓

Online penetration by wine consumption frequency

Base = All Singaporean semi-annual wine drinkers (n=600)

	All Singaporean semi-annual wine drinkers (n=600)	Wine consumption frequency			
		Very frequently (at least twice a week) (n=191)	Frequently (about once a week) (n=153)	Occasionally (1-3 times a month) (n=143)	Rarely (2-6 times a year) (n=113)
Online users	54%	69%	54%	48%	37%
Non-online users	46%	31%	46%	52%	63%

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

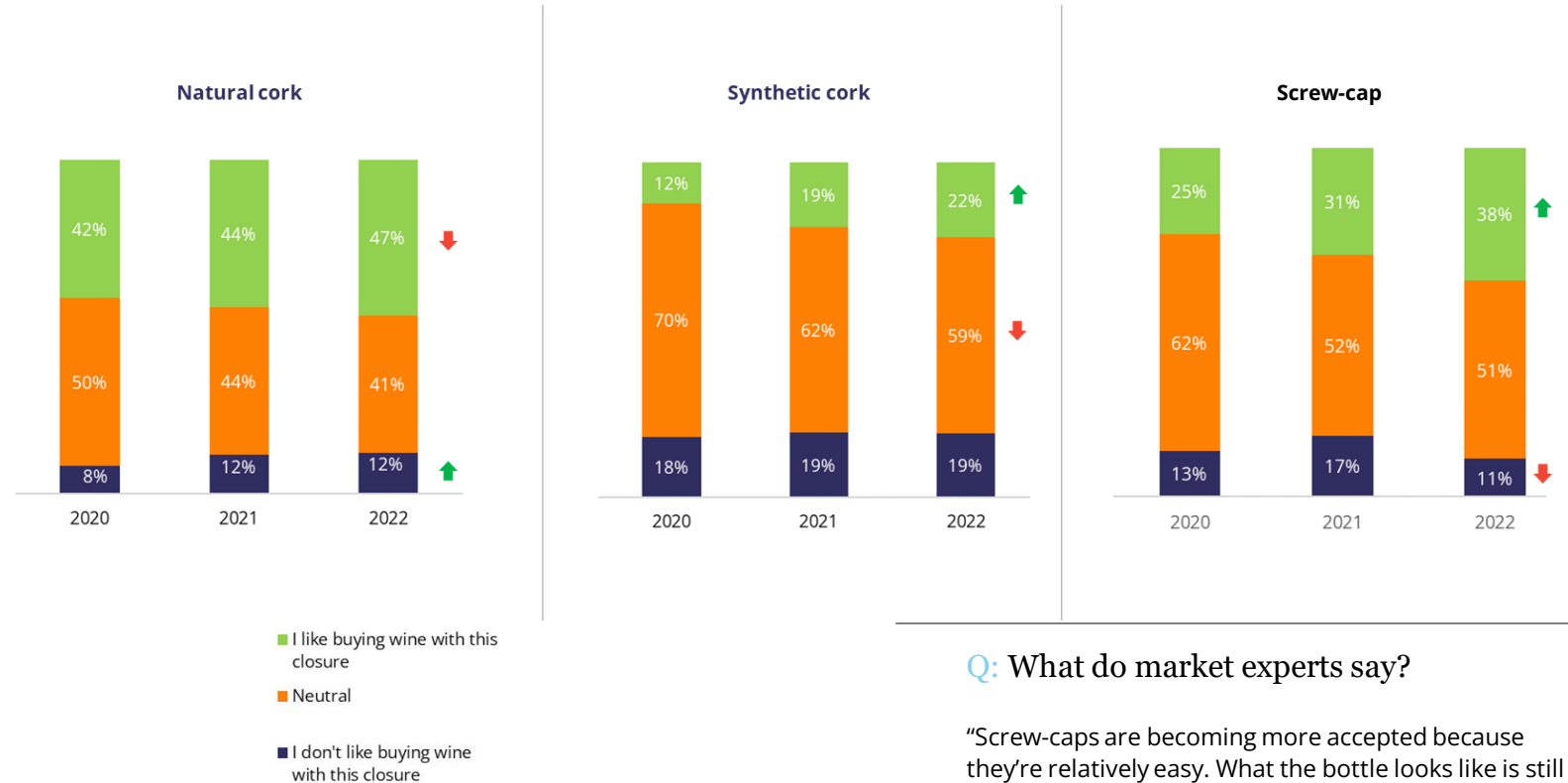
Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

6. Improved perceptions of alternative closures

Singaporean wine drinkers tend to hold more positive views of natural cork closures, but there has been a notable shift, with consumers now more likely to like buying wines with both screw-cap and synthetic cork tops

Wine closure preferences

% who hold the following view of each wine closure type
Base = All Singaporean semi-annual wine drinkers (n=600)



Q: What do market experts say?

“Screw-caps are becoming more accepted because they’re relatively easy. What the bottle looks like is still most important, however.”

Wine marketer, Singapore

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

Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

7. Hong Kong politics provides opportunities

Trade experts interviewed noted how political turmoil in Hong Kong has provided opportunities in Singapore

Capital and expat workforces are relocating to the market, potentially boosting future wine consumption and allowing the market to occupy a position as a gateway to the region for wine

Q: What do market experts say?

"Hong Kong is going through quite a few difficulties and we are just taking advantage of that. It's definitely the case that a lot of expats who are based in Hong Kong are relocating to Singapore. We see that in the applications we get for memberships"

Head of wine at a private members' club, Singapore

Q: What do market experts say?

"In terms of stability, in economics, politics, investors can see Singapore is a safer place to invest. Overnight they've been buying a lot of properties, and investing into business in Singapore, shifting their offices from Hong Kong to Singapore."

Wine consultant, Singapore

Source: Market expert interviews

Management Summary – tracking metrics

Red and white wine consumption both down as are top regions, countries and brands

Top alcoholic beverages

% who have drunk the following beverages in the past 12 months

	2020	2022	Tracking
Red wine	90%	85%	↓
Beer	79%	72%	↓
White wine	67%	63%	→
Whisky / Whiskey	44%	42%	→
Champagne	43%	41%	→

Top region of origin

% who have drunk wine from the following regions in the past six months

	2020	2022	Tracking
Bordeaux	37%	30%	↓
Champagne	25%	20%	→
Napa Valley	19%	16%	→
Barossa Valley	14%	12%	→
Central Valley	9%	10%	→

Top country of origin

% who have drunk wine from the following places in the past six months

	2020	2022	Tracking
Australia	53%	49%	→
France	46%	39%	↓
Italy	28%	20%	↓
New Zealand	23%	20%	→
Chile	20%	19%	→

Top wine brands

% who have bought the following brands in the past three months

	2020	2022	Tracking
Jacob's Creek	30%	25%	↓
Wolf Blass	25%	22%	→
Penfolds	18%	17%	→
Yellow Tail	21%	17%	↓
Brown Brothers	12%	14%	→

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Management Summary – tracking metrics

Merlot holds top spot in list of favourite varietals despite fall in consumption

Top red varietals

% who have drunk the following varietals in the past six months

	2020	2022	Tracking
Merlot	54%	50%	→
Cabernet Sauvignon	52%	47%	→
Pinot Noir	42%	40%	→
Shiraz / Syrah	35%	29%	↓
Malbec	21%	18%	→

Top white varietals

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

	2020	2022	Tracking
Sauvignon Blanc	49%	39%	↓
Chardonnay	45%	38%	↓
Moscato	32%	33%	→
Pinot Grigio / Pinot Gris	23%	21%	→
Riesling	25%	20%	→

Top wine-buying channels

% who have bought wine from the following channels in the past six months

	2020	2022	Tracking
Supermarkets	62%	54%	↓
Hypermarkets	36%	35%	→
Wine shop / Shop specialised in alcohol	39%	34%	→
From a supermarket / hypermarket website	n/a	30%	n/a
From an online retailer	n/a	27%	n/a

Top wine-buying retailers

% who mainly use the following retailers to buy wine

	2020	2022	Tracking
Fair Price (eg Cheers, Finest, Xtra, Xpress etc)	47%	44%	→
Cold Storage	38%	29%	↓
Wine Connection	21%	23%	→
Giant	15%	19%	→
Fair Price Online	14%	15%	→

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Market Data

Singapore Wine Landscapes

2022

Market data

Key takeaways

1. Beer maintains dominance of the Singaporean market

Beer makes up 85% of volume in the market, a similar metric to that of last year. It is forecast to grow even further between 2021 and 2026. All wine types combined account for 10%, the second highest category by market share.

2. Momentum for premiumisation in wine

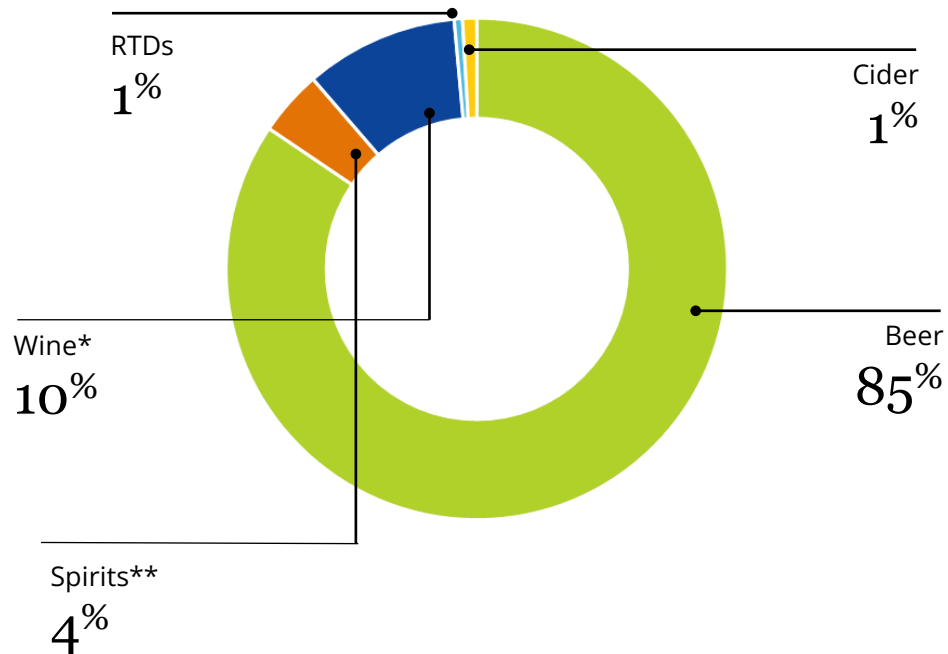
Growth has been recorded in still wine for all price brands above the value category (\$20+), suggesting premiumisation in the market. In the case of sparkling wine this is yet more apparent, with super-premium (\$80-124.99) comprising a quarter of the market and high price bands forecast to have strong growth through to 2026. Sparkling wine from France is by far the most expensive.

Total beverage alcohol market share by category

Beer makes up 85% of beverage alcohol volumes in the market

Total beverage alcohol market share by category

% of purchases that fall within the categories below



Total beverage alcohol market volumes by category

'000s 9-litre cases

	2020	2021
Total beverage alcohol	14,870.1	14,875.3
Beer	12,600.0	12,563.7
Wine*	1,515.6	1,470.5
Spirits**	570.6	626.0
Cider	138.9	136.1
RTDs	45.0	79.1

Source: IWSR

* Wine includes still wine, sparkling wine, fortified wine and light aperitifs

** Spirits include whisky, gin and genever, vodka, agave-based spirits, national spirits, rum, cane, brandy and flavored spirits

Alcohol market change 2016-26

RTDs have seen the biggest growth in volumes over the past five years; total beverage alcohol is forecast to grow between now and 2026, driven largely by beer and wine

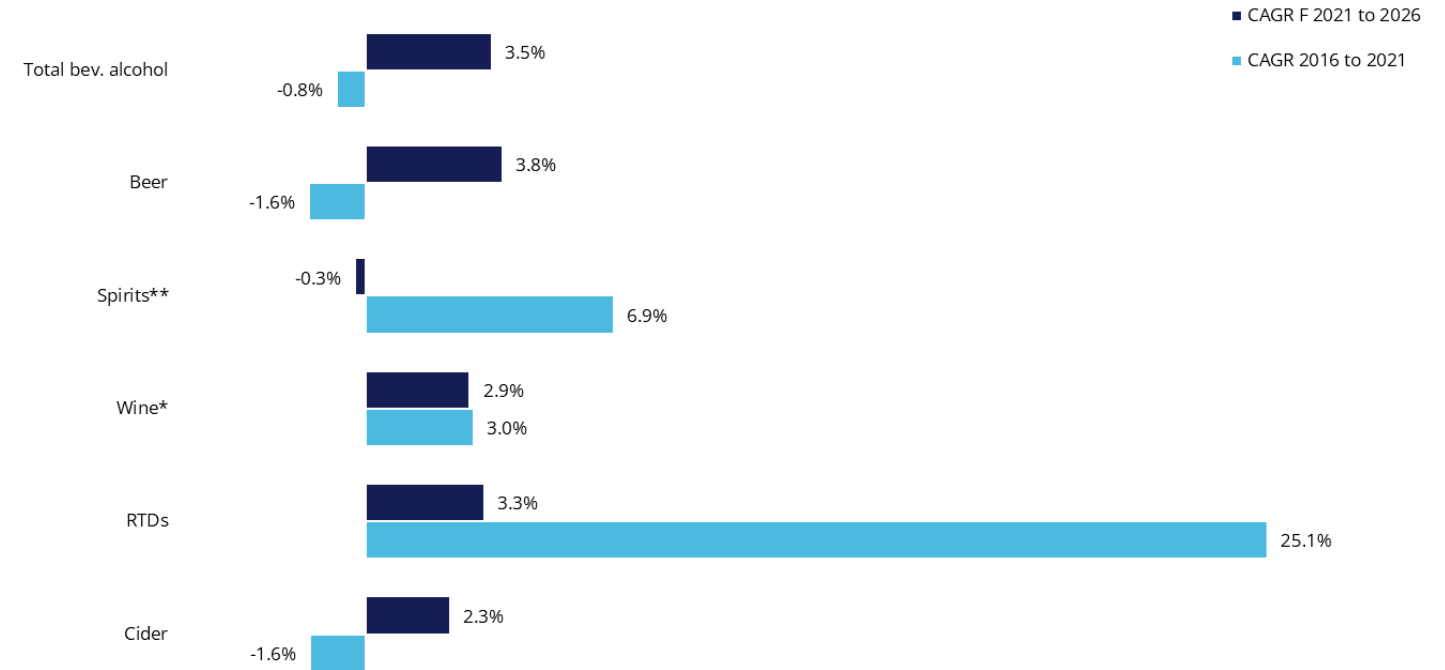
Q: What do market experts say?

"Craft beer and spirits are definitely threats to wine, but wine's unique and differentiating qualities separates it from spirits and beer so I don't believe they are hurting wine consumption."

Head of Wine at a private member's club, Singapore

Historic and forecast volume growth by category

Five-year CAGR %



Source: IWSR

* Wine includes still wine, sparkling wine, fortified wine and light aperitifs

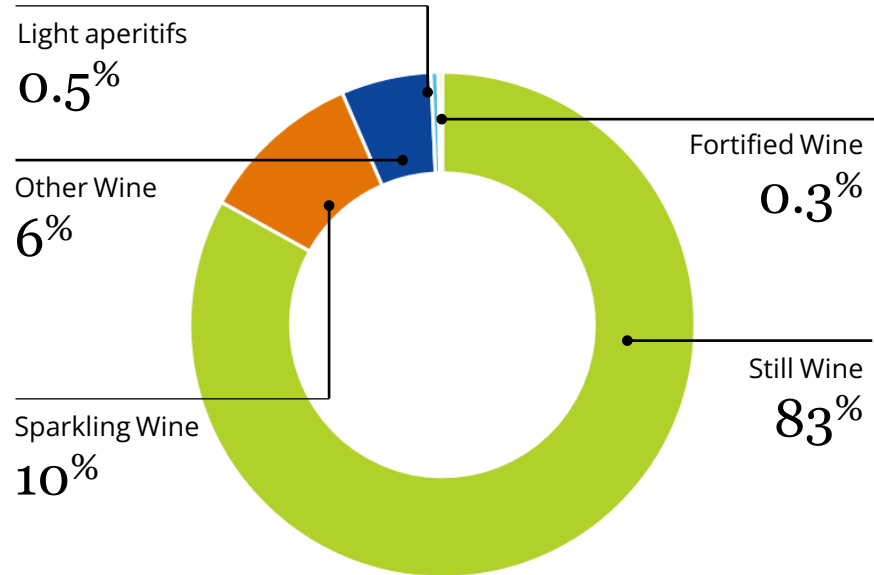
** Spirits include whisky, gin and genever, vodka, agave-based spirits, national spirits, rum, cane, brandy and flavored spirits

Total wine market volumes

Still wine has easily the largest wine market share by volume in Singapore, followed by sparkling wine

Total wine share by category

% of purchases that fall within the categories below



Total wine volumes by category

'000s 9-litre cases

	2020	2021
Total Wine	1,515.6	1,470.5
Still Wine	1,278.2	1,221.5
Sparkling Wine	144.9	153.6
Other Wines	84.0	84.8
Light Aperitifs	5.0	6.8
Fortified Wine	3.5	3.8

Source: IWSR

Wine market change 2016-26

All wine types have grown since 2016 and are expected to keep doing so until 2026; light aperitifs were a particular success story from 2016 to 2021, even though from a low base

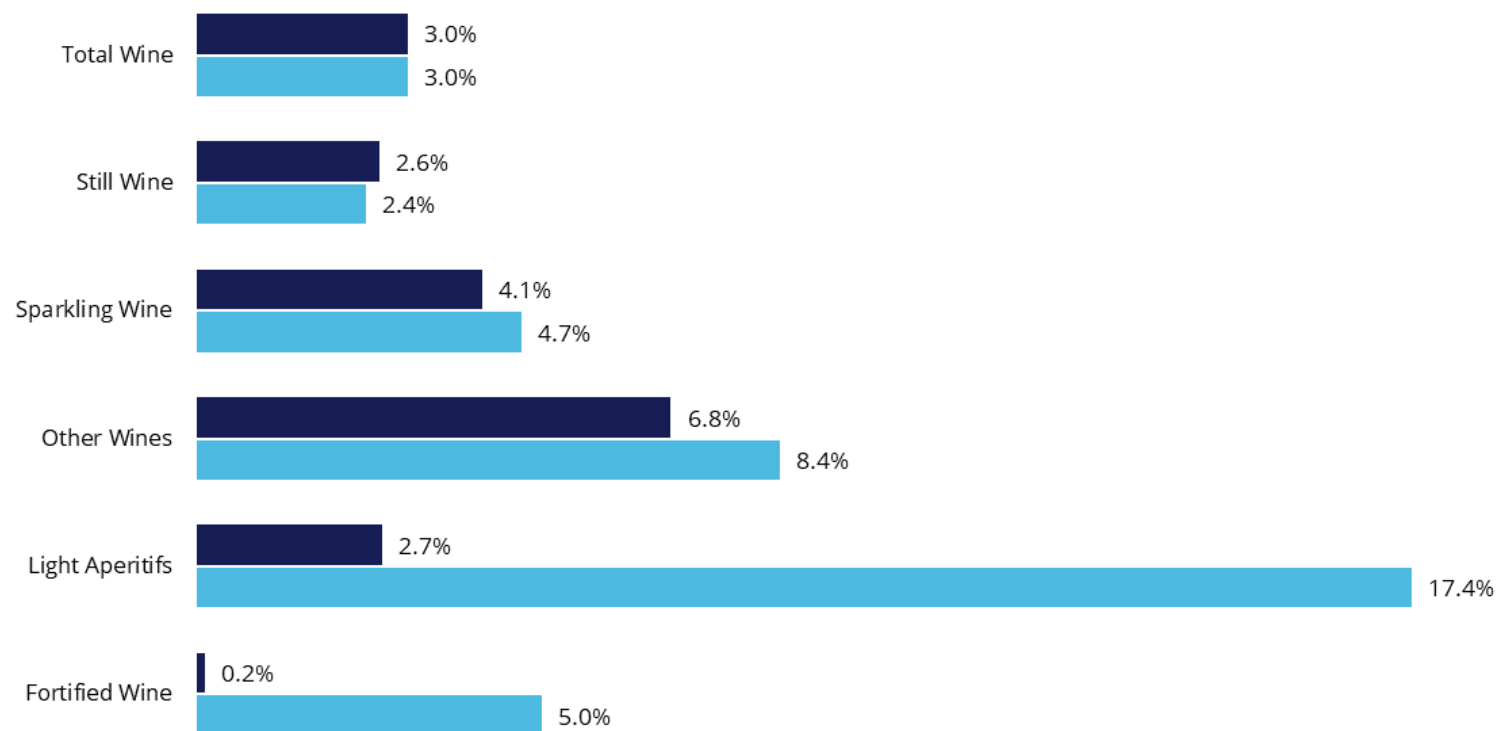
Q: What do market experts say?

“A lot of Singaporeans are willing to explore. There may not be brand loyalty in them, but they have a lot of income and they’re looking to learn more about the category.”

Wine consultant, Singapore

Historic and forecast volume growth by country of origin

Five-year CAGR %



Source: IWSR

Still wine volumes by origin

Australian wine makes up a third of still wine in the market by volume

Total still wine volumes and market share by origin

'000s 9-litre cases

	2020	2021	Market Share
Total	1,278.2	1,221.5	
1 Australian	438.6	396.6	32%
2 Chilean	224.8	219.6	18%
3 French	170.3	176.0	14%
4 Italian	96.1	92.1	8%
5 Spanish	78.5	78.9	6%
6 Argentinian	77.8	76.7	6%
7 New Zealand	77.8	69.5	6%
8 International*	49.5	49.0	4%
9 US	38.5	37.8	3%
10 South African	21.0	19.7	2%

Q: What do market experts say?

"Consumers are buying more Australian wine because, due to the tax situation with China, Australian producers are selling their wines at lower prices in Singapore and people are buying them."

Market Analyst, Singapore

International wine is defined as having grapes from multiple countries of origin

Source: IWSR

Still wine forecasts by origin

Spain and Italy have recorded notable growth in volumes since 2016; future growth is forecast to be more evenly distributed

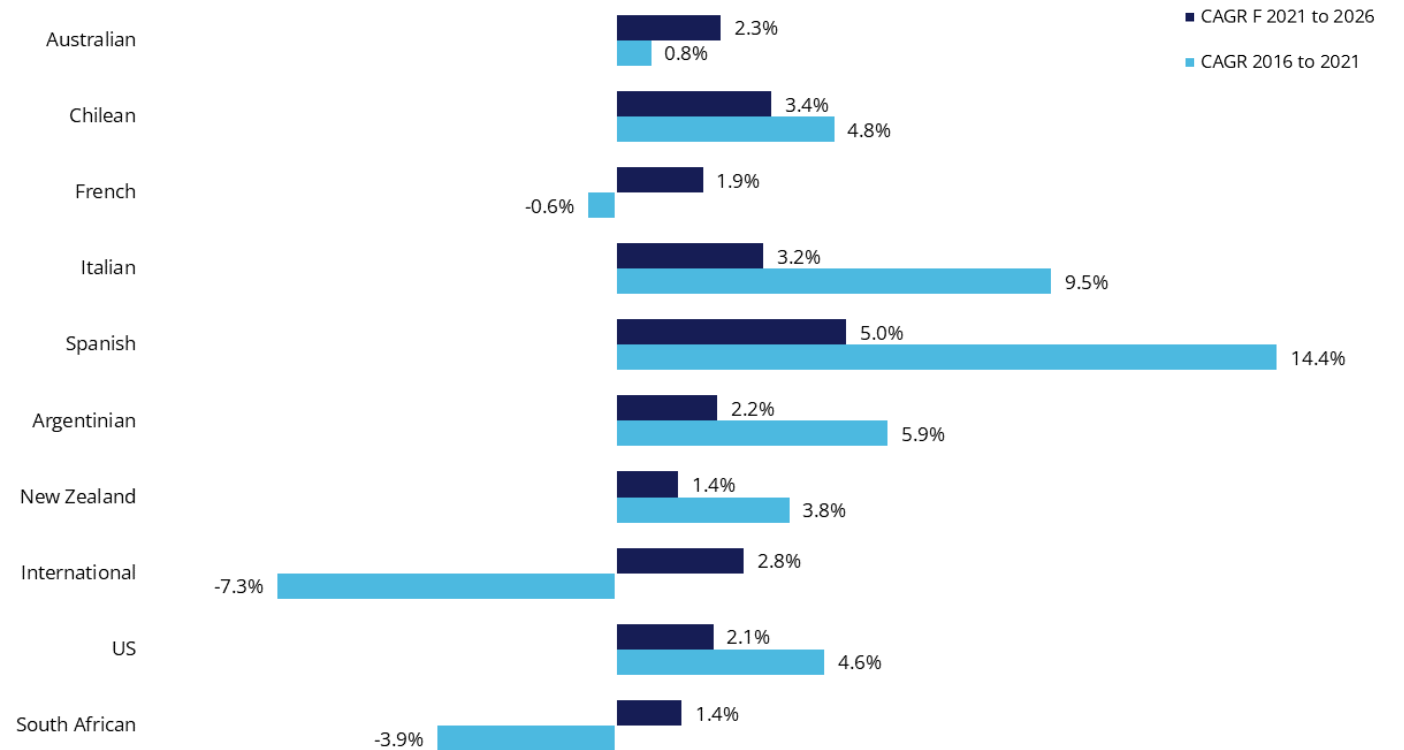
Q: What do market experts say?

“European wines will always be on top; French and Italian especially, but Spanish is catching up. Australia and the US are relatively stagnant. They’re performing, but the growth just isn’t comparable to the European wines.”

Wine marketer, Singapore

Historic and forecast volume growth by country of origin

Five-year CAGR %



International wine is defined as having grapes from multiple countries of origin

Source: IWSR

Still wine retail price by origin

French wine is the most expensive per bottle; prices have steadily risen since 2016 for all countries of origin

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a variable exchange rate

	Retail price per 0.75l 2021 (US\$)	CAGR 16-21	CAGR F 21-26
Total	25.75	2.3%	0.5%
1 French	34.42	2.3%	1.3%
2 New Zealand	29.38	2.0%	0.6%
3 Italian	29.16	1.9%	0.2%
4 International*	26.18	3.4%	0.2%
5 US	25.84	4.6%	1.1%
6 Argentinian	24.95	1.5%	0.4%
7 Chilean	23.30	4.7%	0.2%
8 Australian	22.85	1.5%	0.4%
9 Spanish	21.94	3.7%	0.0%
10 South African	20.91	0.8%	1.0%

Q: What do market experts say?

"A big portion of the population are high-earning expats and they enjoy spending their money on wine."

Head of wine at a members' club, Singapore

International wine is defined as having grapes from multiple countries of origin

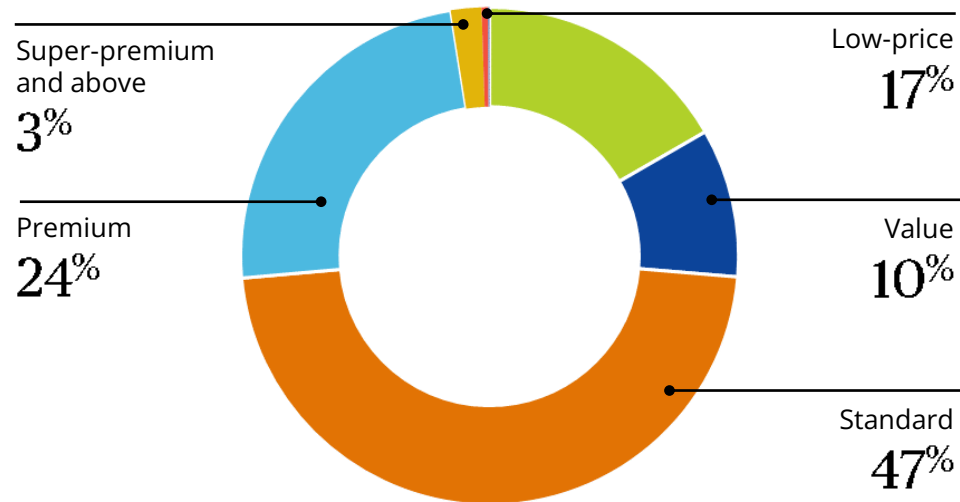
Source: IWSR

Still wine by price band

The majority of wine sold in the market is priced at under \$30, but its share is shrinking; just over a quarter is premium or above, which is where most of the volume growth is coming from

Still wine by price band

% of purchases that fall within the categories below



Still wine volumes by price band

'000s 9-litre cases, prices in local currency

	2020	2021
Low-Price (Under \$10.00)	n/a	10.93
Value (\$10.00 to \$19.99)	278.50	260.75
Standard (\$20.00 to \$29.99)	466.00	418.12
Premium (\$30.00 to \$44.99)	379.90	380.19
Super Premium (\$45.00 to \$74.99)	111.79	110.34
Ultra Premium (\$75.00 to \$94.99)	19.15	18.59
Prestige (Over \$95.00)	22.85	22.55

Source: IWSR

Still wine growth by price band

Growth has been both recorded and is forecast for all price brands higher than value, suggesting premiumisation in the market

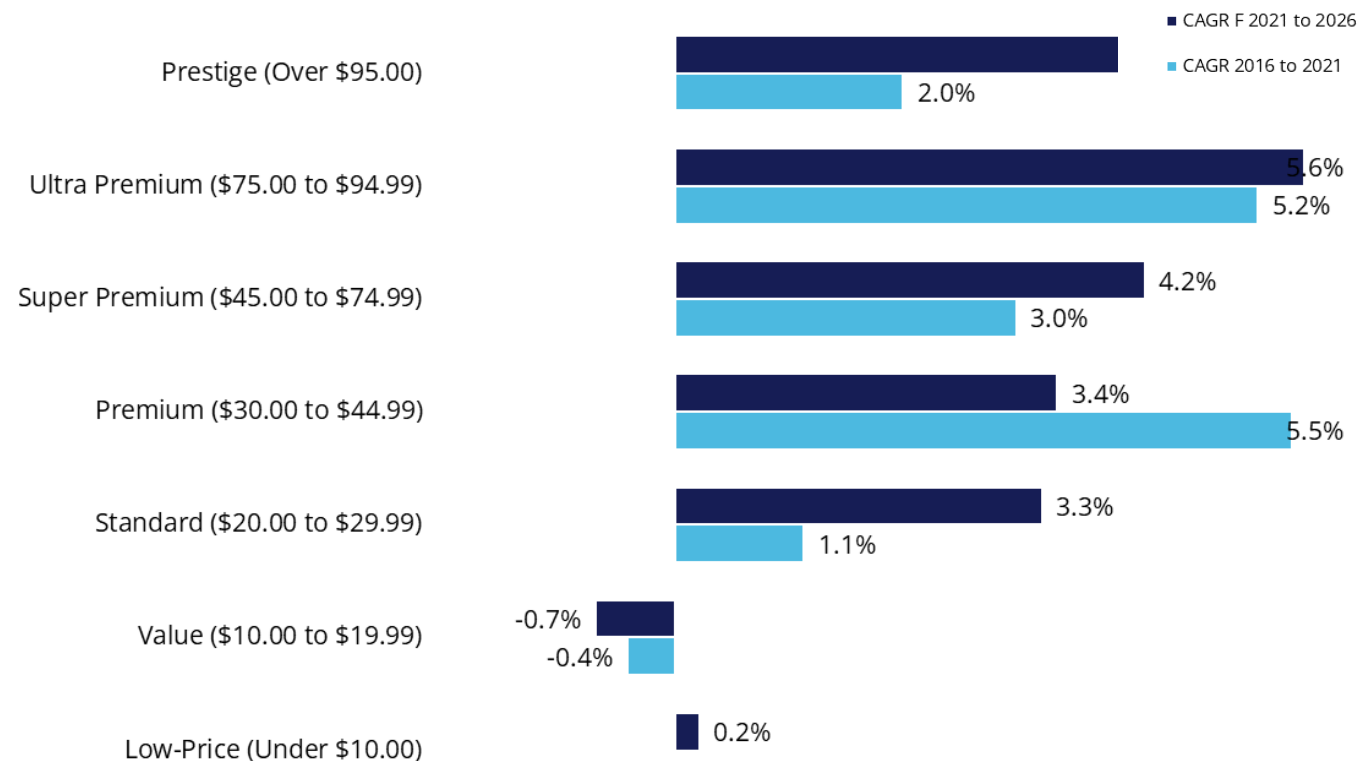
Q: What do market experts say?

“There will continue to be a wealthy and engaged consumer in Singapore, so I think there is a lot of potential for top-end wine to sell here. It isn’t impacted by economic issues as much as other price points.”

Head of wine in a members’ club, Singapore

Historic and forecast volume growth by price band

Five-year CAGR %



Source: IWSR

Still wine consumption per capita

Singapore ranks 87th for per capita consumption of still wine; this is forecast to fall by 2026

Per capita consumption of still wine

Litres per annum (adult LDA+ population)

	2020	2021	CAGR 16-21	CAGR 20-21
1 Portugal	38.85	43.00	-1.4%	10.7%
2 Italy	42.75	41.77	-1.5%	-2.3%
3 Montenegro	38.63	41.77	-1.5%	8.1%
4 Slovenia	37.71	37.63	-2.6%	-0.2%
5 Switzerland	36.56	36.14	-1.3%	-1.1%
6 France	37.44	35.75	-4.5%	-4.5%
7 Denmark	33.08	33.37	-0.2%	0.9%
8 Hungary	30.95	31.52	0.0%	1.8%
9 Austria	31.02	30.93	-1.0%	-0.3%
10 US Virgin Islands	26.36	28.15	-1.7%	6.8%
11 Greece	25.46	27.95	-3.0%	9.8%
12 Germany	28.57	27.78	-0.6%	-2.8%
13 Turks and Caicos	23.14	27.56	-5.1%	19.1%
14 St. Barths	21.50	26.57	n/a	23.6%
15 Uruguay	26.99	25.62	0.0%	-5.1%
16 Argentina	28.71	25.14	-3.2%	-12.4%
17 Sweden	24.46	23.83	0.9%	-2.6%
18 Romania	24.01	23.73	2.6%	-1.1%
19 Slovakia	22.77	22.95	-0.8%	0.8%
20 Spain	20.00	22.31	-1.2%	11.5%
87 Singapore	2.44	2.31	0.9%	-5.7%

Source: IWSR

Sparkling wine volumes by origin

Italian and French sparkling wine hold similar market shares in Singapore

Total sparkling wine volumes and market share by origin

'000s 9-litre cases

	2020	2021	Market Share
Total	144.88	153.62	
1 Italian	59.00	61.35	38%
2 French	50.81	55.92	36%
3 Australian	17.32	17.24	11%
4 Spanish	10.50	11.81	8%
5 US	4.00	4.00	3%
6 Chilean	1.00	1.05	1%
7 South African	1.00	1.00	1%
8= German	0.50	0.50	0%
8= International	0.50	0.50	0%
10 Argentinian	0.25	0.25	0%

Q: What do market experts say?

"There's a surge in sparkling wine. Today, a lot of consumers are substituting Champagne for Prosecco."

Wine consultant, Singapore

Source: IWSR

Sparkling wine retail price by origin

French sparkling wine is the most expensive in the market by some distance

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a variable exchange rate

	Retail price per 0.75l 2021 (US\$)	CAGR 16-21	CAGR F 21-26
Total	35.68	-2.6%	0.6%
1 French	59.61	0.7%	1.5%
2 Spanish	23.43	-0.7%	0.1%
3 Italian	22.51	-0.6%	0.0%
4 German	20.84	0.5%	0.0%
5 Australian	20.58	-2.2%	0.0%
6 US	20.09	0.5%	0.0%
7 Argentinian	19.35	-0.2%	0.0%
8 International	18.60	-0.2%	0.0%
9 Chilean	16.73	-1.6%	0.0%
10 South African	12.58	-3.7%	0.0%

Q: What do market experts say?

“Sparkling is beginning to pick up over the last year. People are willing to spend more of their disposable income and there are more special events like weddings taking place again.”

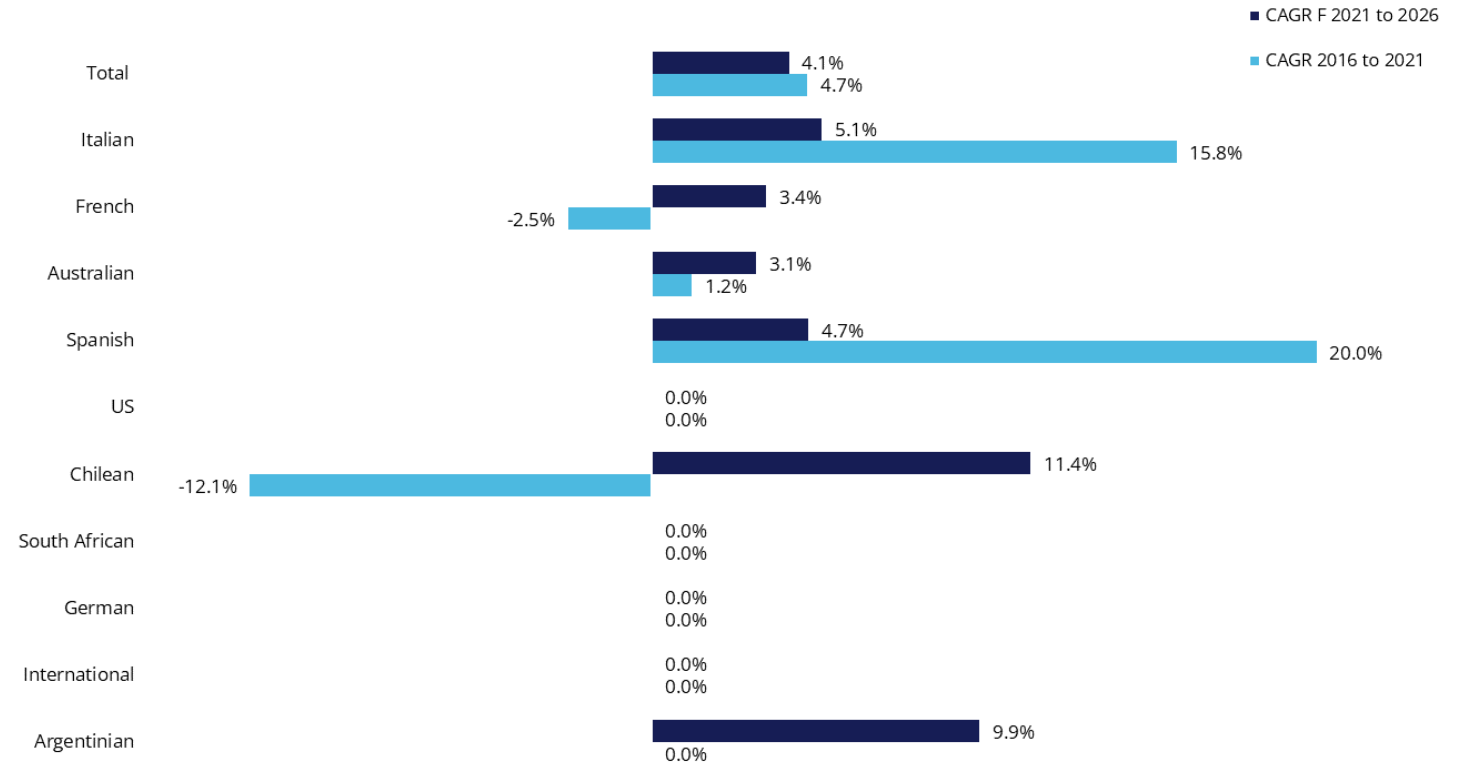
Market analyst, Singapore

Source: IWSR

Sparkling wine growth by country of origin

Italian and Spanish sparkling wines have recorded substantial volume growth from 2016 to 2021

Historic and forecast growth by country of origin
Five-year CAGR %



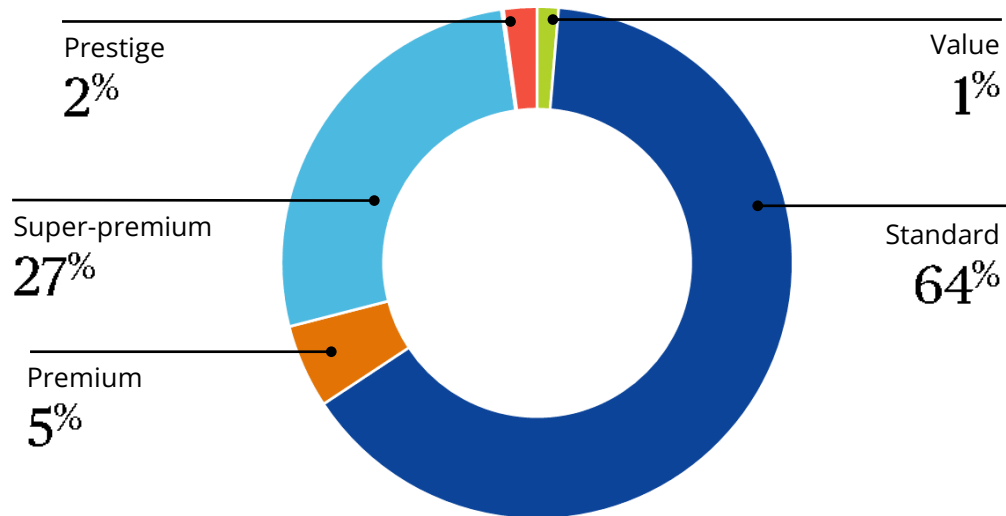
Source: IWSR

Sparkling wine by price band

Super-premium priced sparkling wine makes up over a quarter of the market

Sparkling wine by price band

% of purchases that fall within the categories below



Sparkling wine volumes by price band

'000s 9-litre cases, prices in local currency

	2020	2021
Value (Under \$20)	1.70	2.05
Standard (\$20 to \$49.99)	96.25	98.02
Premium (\$50 to \$79.99)	7.27	8.05
Super Premium (\$80 to \$124.99)	36.61	40.75
Ultra Premium (\$125 to \$199.99)	n/a	0.21
Prestige (\$200 and Over)	3.05	3.20

n/a = no data available

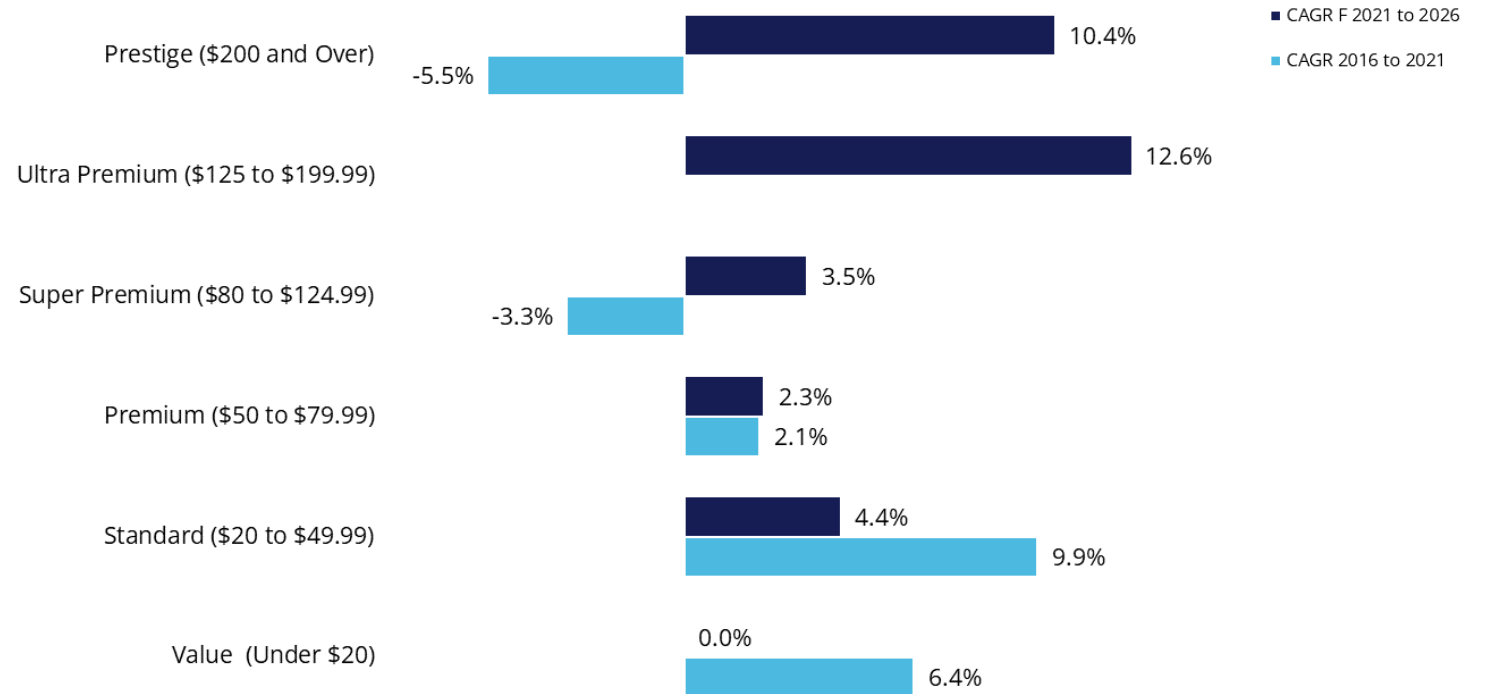
Source: IWSR

Sparkling wine growth by price band

High price bands are forecast to have strong growth through to 2026

Historic and forecast growth by price band

Five-year CAGR %



Source: IWSR

Sparkling wine consumption per capita

Singapore ranks 77th for sparkling wine by per capita consumption

Per capita consumption of sparkling wine

Litres per annum (LDA+ adults)

		2020	2021	CAGR 16-21	CAGR 20-21
1	St. Barths	7.03	9.77	n/a	-32.7%
2	Italy	7.51	7.79	2.4%	0.9%
3	Turks and Caicos	5.34	6.64	-6.0%	-40.0%
4	Germany	5.53	5.57	-2.1%	-5.7%
5	Lithuania	4.40	4.88	3.0%	9.2%
6	France	4.33	4.74	-2.3%	-13.5%
7	Latvia	4.61	4.47	2.3%	-3.9%
8	Belgium and Luxembourg	4.01	4.28	-1.7%	-7.1%
9	Martinique	3.90	4.19	-6.2%	-11.4%
10	Guadeloupe	3.57	4.15	-4.7%	-24.1%
11	Estonia	3.60	4.08	2.4%	-2.9%
12	Austria	3.17	3.44	-0.2%	-8.7%
13	Sweden	3.05	3.34	10.1%	3.9%
14	Switzerland	2.93	3.23	1.1%	-3.8%
15	United Kingdom	2.87	3.22	2.0%	-3.6%
16	Cayman Islands	3.14	3.18	3.2%	-15.2%
17	Australia	2.98	3.18	4.8%	3.6%
18	New Zealand	3.06	3.11	-0.2%	0.8%
19	Czech Republic	2.56	2.90	10.0%	8.8%
20	Slovenia	2.80	2.89	3.7%	4.2%
77	Singapore	0.28	0.29	3.1%	-0.8%

Source: IWSR

Fortified wine volumes: Current and historical

Port makes up the majority of volumes in what is a relatively small market; Spanish fortified wine, largely sherry, is the only growth story

Fortified wine volumes and market share by origin

'000s 9-litre cases

	2020	2021	CAGR 16-21	Market Share
Total	3.50	3.82	5.0%	
Portuguese	2.25	2.25	0.0%	59%
Spanish	0.75	1.07	16.4%	28%
Australian	0.25	0.25	0.0%	7%
South African	0.15	0.15		4%
International	0.10	0.10		3%

Source: IWSR
No data available for forecast

Market Demographics

Singapore Wine Landscapes

2022

Market demographics

Key takeaways

1. Most wine drinkers consume monthly or more

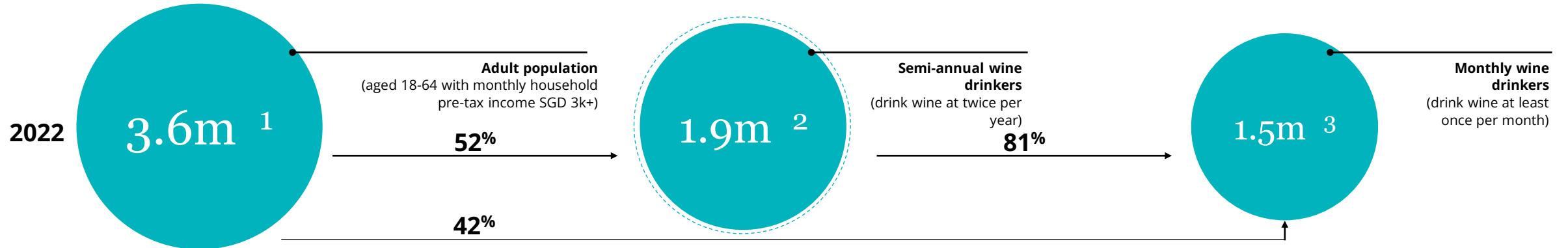
81% of semi-annual wine drinkers in the market consume wine at least monthly.

2. The younger is population stable

Although the proportion of semi-annual wine drinkers who are Boomers has grown, the Millennial and Gen Z population has remained stable over the same period.

Singaporean wine drinkers

There are 1.5 million monthly wine drinkers in Singapore, and they account for eight in 10 of the semi-annual wine drinkers in the market



1 DESTATIS

2 Wine Intelligence online calibration study with YouGov, rolling average of Feb'20 and Feb'22, n≥628 Singaporean adults aged 18-64, income SGD3k+. Wine=still light wine (red, white, rosé)

3 Source: Wine Intelligence, Vinitrac® Singapore, Apr '22 (n=600) Singaporean semi-annual wine drinkers

*In 2017, monthly wine drinkers are from a base of monthly income of SG\$7k+

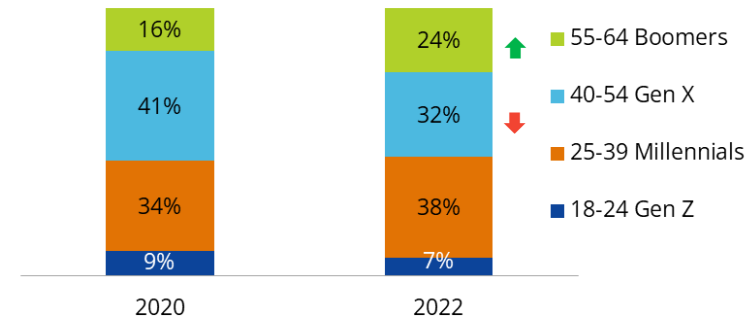
Demographics of semi-annual wine drinkers

Singaporean wine drinkers are net older in 2022 than in 2020, mainly from a growth in Boomers and a decline in Gen X; Millennial & Gen Z populations are stable

Gender



Generation cohorts



Monthly pre-tax income

	2020	2022	Tracking
\$3,000 - 6,999	23%	33%	↑
\$7,000 - 9,999	18%	17%	→
SGD 10,000 - 14,999	26%	19%	↓
SGD 15,000+	33%	30%	→

2020 demographic data is based on calibration from 2017

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Drinking Repertoire

Singapore Wine Landscapes
2022

Drinking repertoire

Key takeaways

1. A narrowing of alcohol choices

There has been a notable reduction in the repertoires of semi-annual wine drinkers, particularly for historically popular alcoholic drinks such as red and rosé wines, beer and cider. This is not compensated for by consumption growth in other beverage categories.

2. Awareness of France is in decline

A long-standing leading country of origin, and home to some of the most recognisable regions for Singaporean semi-annual drinkers, France has seen sustained declines in both country and region of origin metrics.

Drinking repertoire

Consumption has remained stable for the majority of alcoholic beverages with the exception of market leaders red wine and beer, with no categories seeing consumption growth

Red and rosé wine consumption continues to decrease year-on-year, suggesting a gradual shrinking of alcohol repertoires and drinking occasions

Alcoholic beverage repertoire: Top 15 tracking

% who have drunk the following beverages in the past 12 months
Base = All Singaporean semi-annual wine drinkers (n=600)

Ranking '22		2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
					vs. '20	vs. '21
1	Red wine	90%	90%	85%	↓	↓
2	Beer	79%	77%	72%	↓	→
3	White wine	67%	64%	63%	→	→
4	Whisky / Whiskey	44%	45%	42%	→	→
5	Champagne	43%	46%	41%	→	→
6	Cider	39%	36%	30%	↓	↓
7	Craft beer	29%	34%	29%	→	→
8	Rosé wine	27%	32%	27%	→	↓
9=	Vodka	26%	29%	26%	→	→
9=	Gin	29%	28%	26%	→	→
11	Cocktails	28%	23%	24%	→	→
12=	Sake	27%	24%	23%	→	→
12=	Brandy / Cognac	24%	26%	23%	→	→
14	Sweet / dessert wine	17%	20%	17%	→	→
15	Other sparkling wine	18%	20%	16%	→	→

*SAWD = semi-annual wine drinkers in Singapore; = Represents equal ranking

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

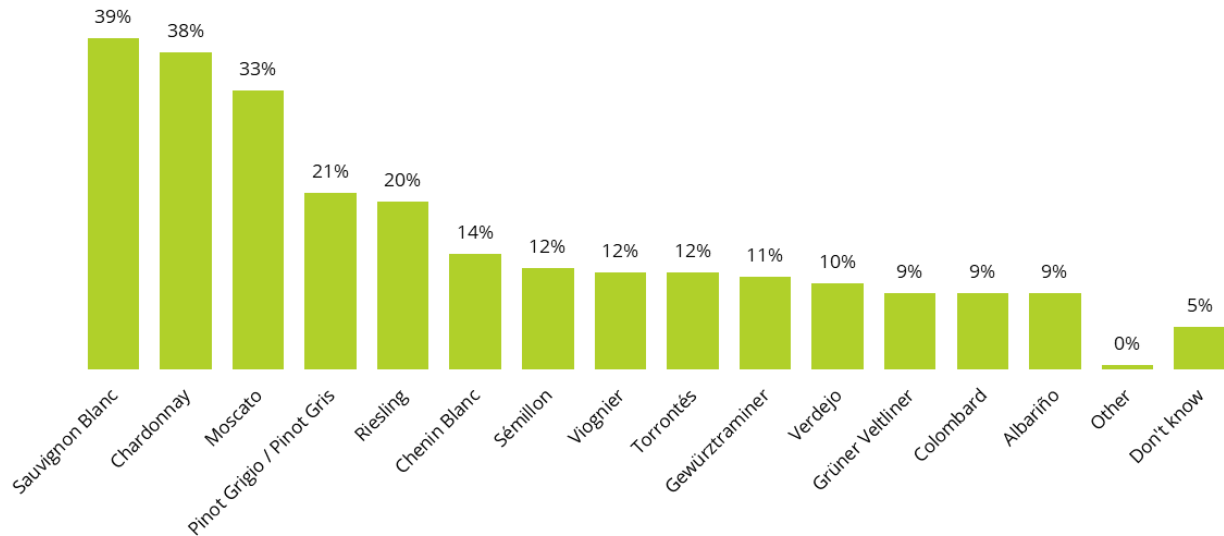
Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

White varietal consumption

Mainstream varietals such as Sauvignon Blanc and Chardonnay remain the most widely-consumed but have seen long-term declines. Some more niche varietals are on the rise

White varietal consumption

% who have drunk the following varietals or wine types in the past six months
Base = All Singaporean semi-annual wine drinkers (n=600)



White varietal consumption: Tracking

% who have drunk the following varietals or wine types in the past six months
Base = All Singaporean semi-annual wine drinkers (n=600)

Ranking '22		2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
					vs. '20	vs. '21
1	Sauvignon Blanc	49%	43%	39%	↓	→
2	Chardonnay	45%	43%	38%	↓	→
3	Moscato	32%	32%	33%	→	→
4	Pinot Grigio / Pinot Gris	23%	24%	21%	→	→
5	Riesling	25%	23%	20%	→	→
6	Chenin Blanc	15%	16%	14%	→	→
7=	Sémillon	13%	14%	12%	→	→
7=	Viognier	7%	11%	12%	↑	→
7=	Torrontés	10%	10%	12%	→	→
10	Gewürztraminer	9%	10%	11%	→	→
11	Verdejo	7%	9%	10%	↑	→
12=	Grüner Veltliner	8%	9%	9%	→	→
12=	Colombard	9%	10%	9%	→	→
12=	Albariño	9%	10%	9%	→	→
	Other	1%	2%	0%	→	↓
	Don't know	9%	6%	5%	↓	→

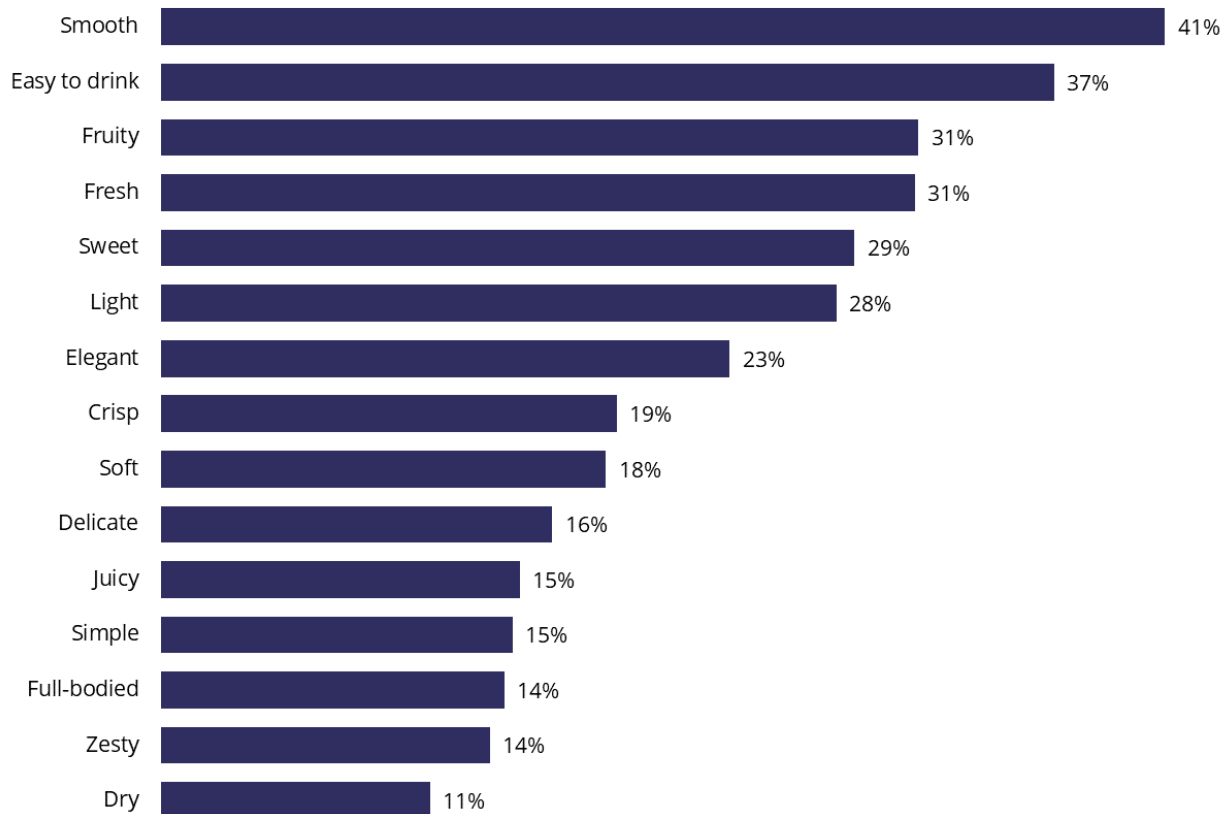
Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

White wine attributes

The average Singaporean wine drinker prefers a smooth, easy-drinking white wine. Fruity notes or sweet styles are also popular rather than dry characteristics

Ideal white wine attributes: Top 15

% who selected each description for their ideal white wine
Base = All Singaporean semi-annual wine drinkers (n=600)



Demographic insights

- Millennials are the age cohort that are the most likely to hold stronger, more specific attribute preferences compared with the average Singaporean consumer. Of particular favour are sweet styles (36%), bold (18%) and herbaceous notes (14%)

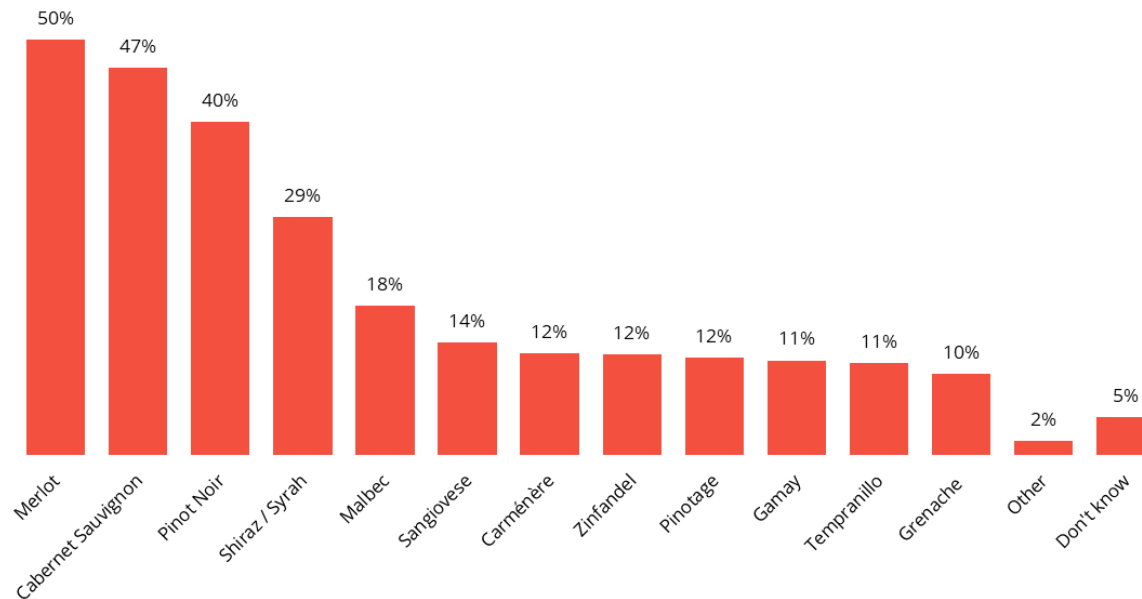
Source: Wine Intelligence, Vinitrac® Singapore, Apr '22 (n=600) Singaporean semi-annual wine drinkers

Red varietal consumption

Mainstream red varietals are losing share, particularly Shiraz / Syrah, but remain dominant with little to suggest that they will be overtaken by more niche varietals

Red varietal consumption

% who have drunk the following varietals or wine types in the past six months
Base = All Singaporean semi-annual wine drinkers (n=600)



Red varietal consumption: Tracking

% who have drunk the following varietals or wine types in the past six months
Base = All Singaporean semi-annual wine drinkers (n=600)

Ranking '22		2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
					vs. '20	vs. '21
1	Merlot	54%	53%	50%	→	→
2	Cabernet Sauvignon	52%	48%	47%	→	→
3	Pinot Noir	42%	40%	40%	→	→
4	Shiraz / Syrah	35%	32%	29%	↓	→
5	Malbec	21%	21%	18%	→	→
6	Sangiovese	14%	12%	14%	→	→
7=	Carménère	10%	11%	12%	→	→
7=	Zinfandel	11%	11%	12%	→	→
7=	Pinotage	15%	14%	12%	→	→
10=	Gamay	8%	10%	11%	↑	→
10=	Tempranillo	9%	11%	11%	→	→
12	Grenache	12%	13%	10%	→	→
	Other	2%	1%	2%	→	→
	Don't know	6%	6%	5%	→	→

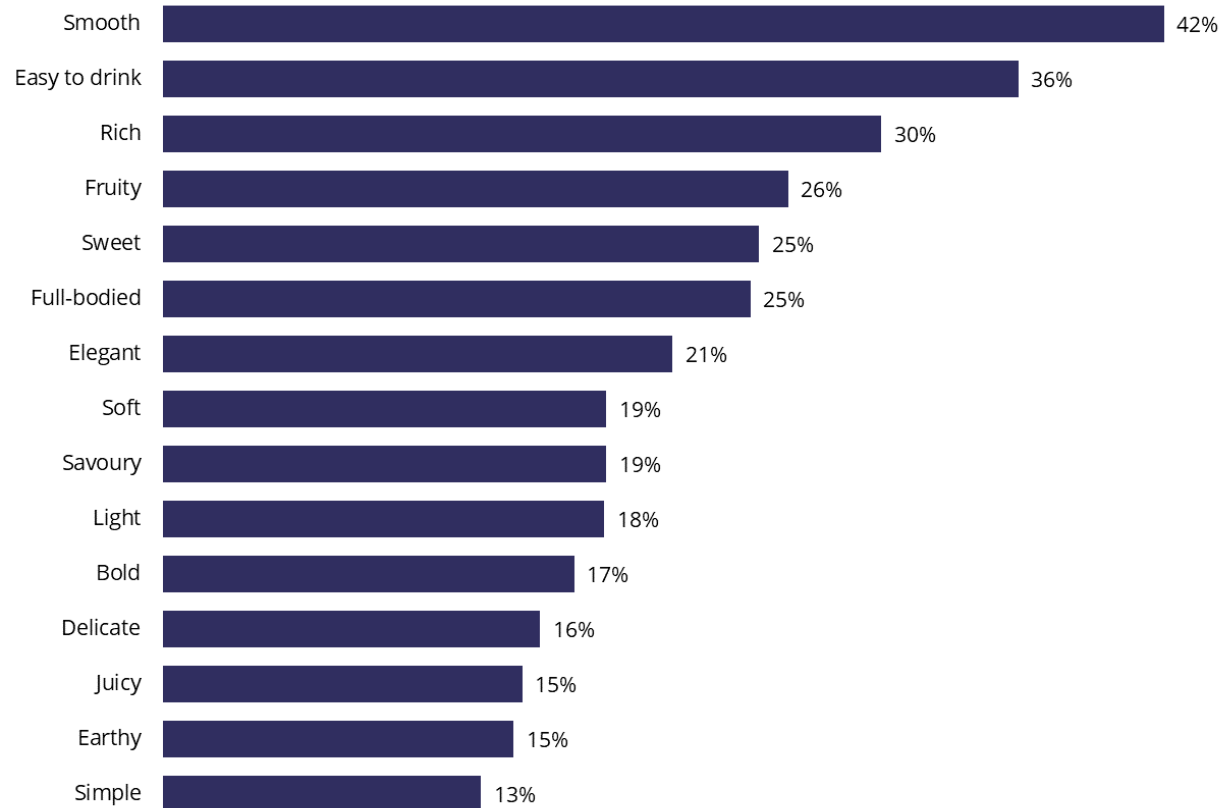
Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Red wine attributes

Similar to white wine, Singaporean wine drinkers prefer smooth, easy drinking red wines

Ideal red wine attributes: Top 15

% who selected each description for their ideal red wine
Base = All Singaporean semi-annual wine drinkers (n=600)



Demographic insights

- Although an attribute more commonly seen in white wines, sweet reds are also popular. This is especially true among female consumers under the age of 34

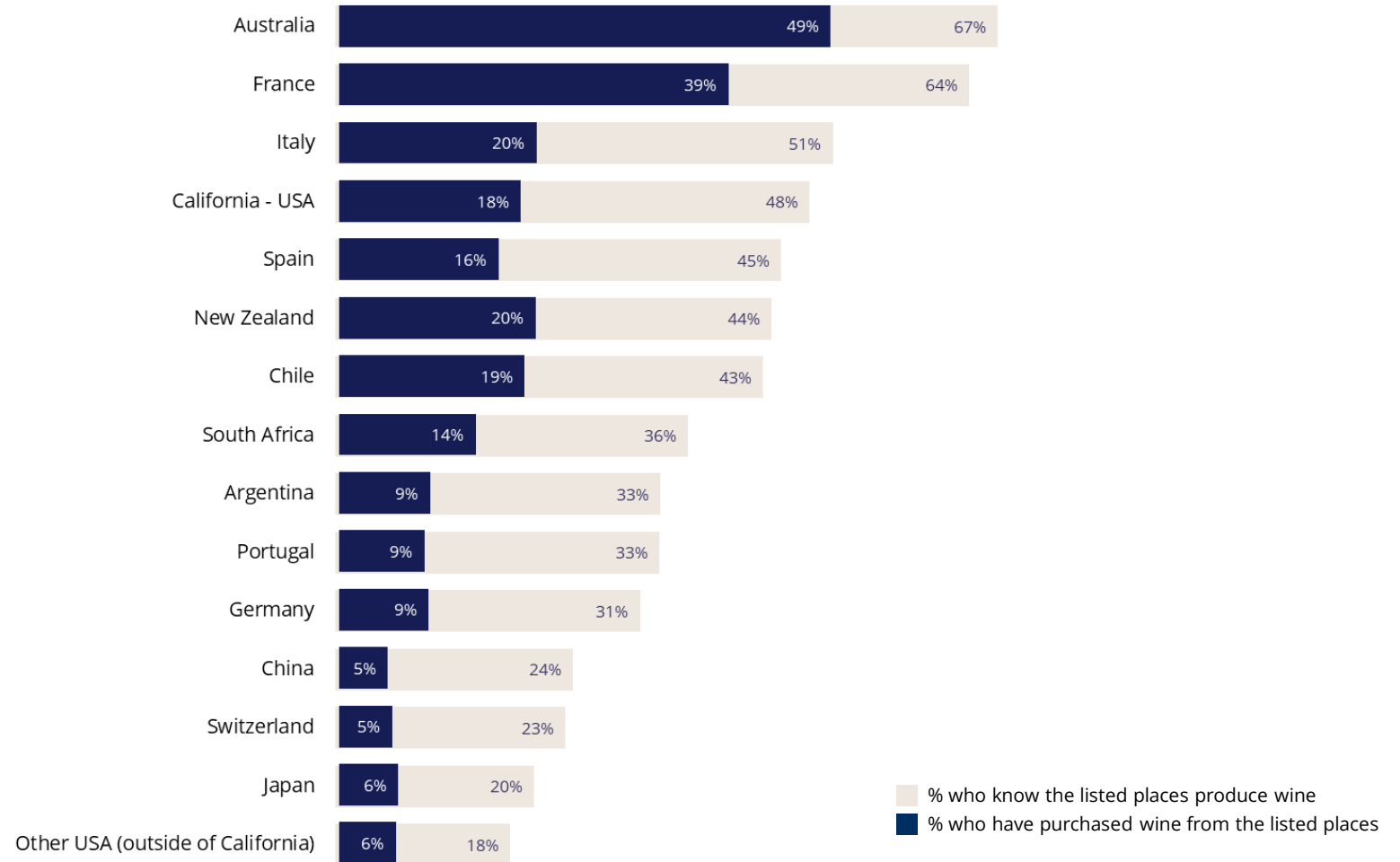
Source: Wine Intelligence, Vinitrac® Singapore, Apr '22 (n=600) Singaporean semi-annual wine drinkers

Country of origin consumption / awareness

APAC neighbour Australia tops both consumption and awareness rankings, pulling ahead of traditional Old World producers France and Italy

Country of origin: Awareness and consumption levels

% of those who know of or have purchased wine from the following places
Base = All Singaporean semi-annual wine drinkers (n=600)



Source: Wine Intelligence, Vinitrac® Singapore, Apr'22 (n=600) Singaporean semi-annual wine drinkers

Country of origin awareness

France has experienced sustained declines in awareness over the past two years.

However, sales overall have remained stable, suggesting that decline in awareness may be among those who are occasional or non-drinkers of France

Country of origin awareness: Tracking

% of those who know the following places produce wine
Base = All Singaporean semi-annual wine drinkers (n=600)

Ranking '22		2020	2021	2022	Tracking	
		(n=600)	(n=600)	(n=600)	vs. '20	vs. '21
1	Australia	70%	70%	67%	→	→
2	France	74%	71%	64%	↓	↓
3	Italy	55%	54%	51%	→	→
4	California - USA	54%	48%	48%	→	→
5	Spain	48%	44%	45%	→	→
6	New Zealand	48%	45%	44%	→	→
7	Chile	48%	43%	43%	→	→
8	South Africa	41%	39%	36%	→	→
9=	Argentina	34%	32%	33%	→	→
9=	Portugal	33%	33%	33%	→	→
11	Germany	31%	28%	31%	→	→
12	China	24%	23%	24%	→	→
13	Switzerland	23%	21%	23%	→	→
14	Japan	22%	20%	20%	→	→
15	Other USA (outside of California)	19%	20%	18%	→	→

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Country of origin consumption

A significant drop in recalled consumption for historically market leaders France and Italy since 2020, reflecting the dynamics relating to awareness

Q: What do market experts say?

"You get better value for money from origins like Chile and Argentina, whereas with French wine you get the quality you pay for."

Market Analyst, Singapore

Country of origin consumption: Tracking

% who have drunk wine from the following places in the past six months
Base = All Singaporean semi-annual wine drinkers (n=600)

Ranking '22		2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
					vs. '20	vs. '21
1	Australia	70%	70%	67%	→	→
2	France	74%	71%	64%	↓	↓
3	Italy	55%	54%	51%	→	→
4	California - USA	54%	48%	48%	→	→
5	Spain	48%	44%	45%	→	→
6	New Zealand	48%	45%	44%	→	→
7	Chile	48%	43%	43%	→	→
8	South Africa	41%	39%	36%	→	→
9=	Argentina	34%	32%	33%	→	→
9=	Portugal	33%	33%	33%	→	→
11	Germany	31%	28%	31%	→	→
12	China	24%	23%	24%	→	→
13	Switzerland	23%	21%	23%	→	→
14	Japan	22%	20%	20%	→	→
15	Other USA (outside of California)	19%	20%	18%	→	→
	Other	1%	2%	2%	→	→
	Don't know	2%	2%	1%	→	→

= Represents equal ranking

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

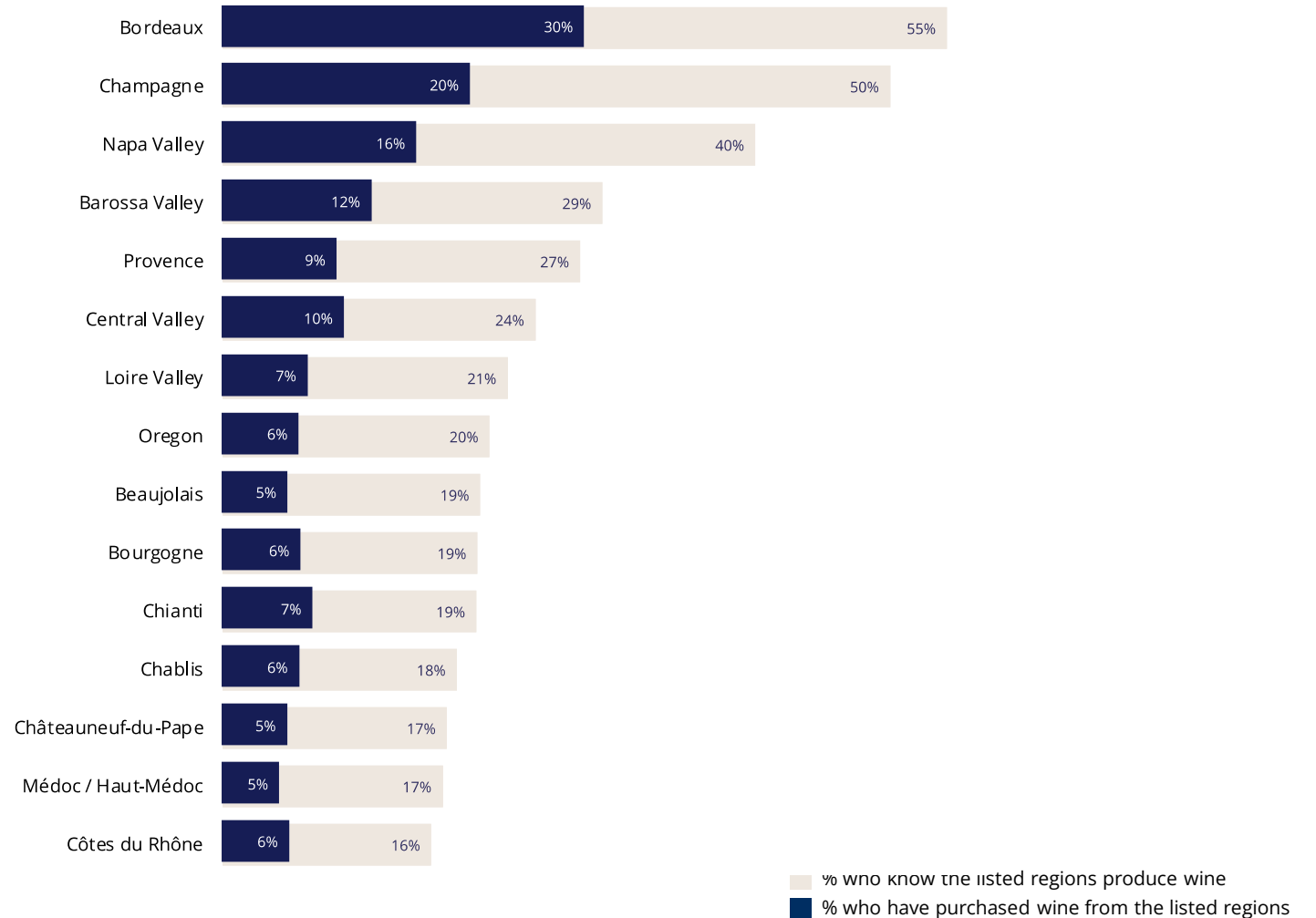
Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Region of origin consumption / awareness

French regions of origin are the most familiar to Singaporean semi-annual wine drinkers, with Bordeaux and Champagne being the most recognised and consumed

Region of origin: Top 15 awareness and consumption levels

% of those who know of or have purchased wine from the following regions
Base = All Singaporean semi-annual wine drinkers (n=600)



Source: Wine Intelligence, Vinitrac® Singapore, Apr'22 (n=600) Singaporean semi-annual wine drinkers

Region of origin awareness

Singaporean semi-annual wine drinkers are aware of wine-producing regions within France the most.

Awareness levels have been volatile over the past two years, with a handful of regions seeing declines, suggesting a potential loss of objective knowledge among wine consumers

Region of origin awareness: Top 15, tracking

% of those who know the following regions produce wine
Base = All Singaporean semi-annual wine drinkers (n=600)

Ranking '22		2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
					vs. '20	vs. '21
1	Bordeaux	63%	60%	55%	↓	→
2	Champagne	55%	51%	50%	→	→
3	Napa Valley	46%	42%	40%	↓	→
4	Barossa Valley	32%	29%	29%	→	→
5	Provence	31%	30%	27%	→	→
6	Central Valley	25%	29%	24%	→	↓
7	Loire Valley	21%	24%	21%	→	→
8	Oregon	19%	21%	20%	→	→
9=	Beaujolais	21%	20%	19%	→	→
9=	Bourgogne	23%	19%	19%	→	→
9=	Chianti	24%	22%	19%	↓	→
12	Chablis	24%	20%	18%	↓	→
13=	Châteauneuf-du-Pape	21%	23%	17%	→	↓
13=	Médoc / Haut-Médoc	22%	19%	17%	↓	→
15	Côtes du Rhône	19%	22%	16%	→	↓

= Represents equal ranking

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Region of origin consumption

Wiens from Bordeaux and Champagne are the most consumed by Singaporean semi-annual wine drinkers, in a market where awareness and consumption are largely aligned

Region of origin consumption: Top 15, tracking

% who have bought wine from the following wine-producing regions in the past three months
Base = All Singaporean semi-annual wine drinkers (n=600)

Ranking '22		2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
					vs. '20	vs. '21
1	Bordeaux	37%	33%	30%	↓	→
2	Champagne	25%	20%	20%	→	→
3	Napa Valley	19%	19%	16%	→	→
4	Barossa Valley	14%	14%	12%	→	→
5	Central Valley	9%	9%	10%	→	→
6	Provence	11%	11%	9%	→	→
7=	Chianti	9%	7%	7%	→	→
7=	Loire Valley	6%	9%	7%	→	→
9=	Bourgogne	8%	5%	6%	→	→
9=	Chablis	8%	9%	6%	→	→
9=	Oregon	6%	7%	6%	→	→
9=	Côtes du Rhône	6%	7%	6%	→	→
13=	Beaujolais	6%	6%	5%	→	→
13=	Châteauneuf-du-Pape	7%	7%	5%	→	→
13=	Médoc / Haut-Médoc	8%	7%	5%	↓	→

= Represents equal ranking

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Hot Topic: SOLA in Singapore

Singapore Wine Landscapes

2022

SOLA in Singapore

Key takeaways

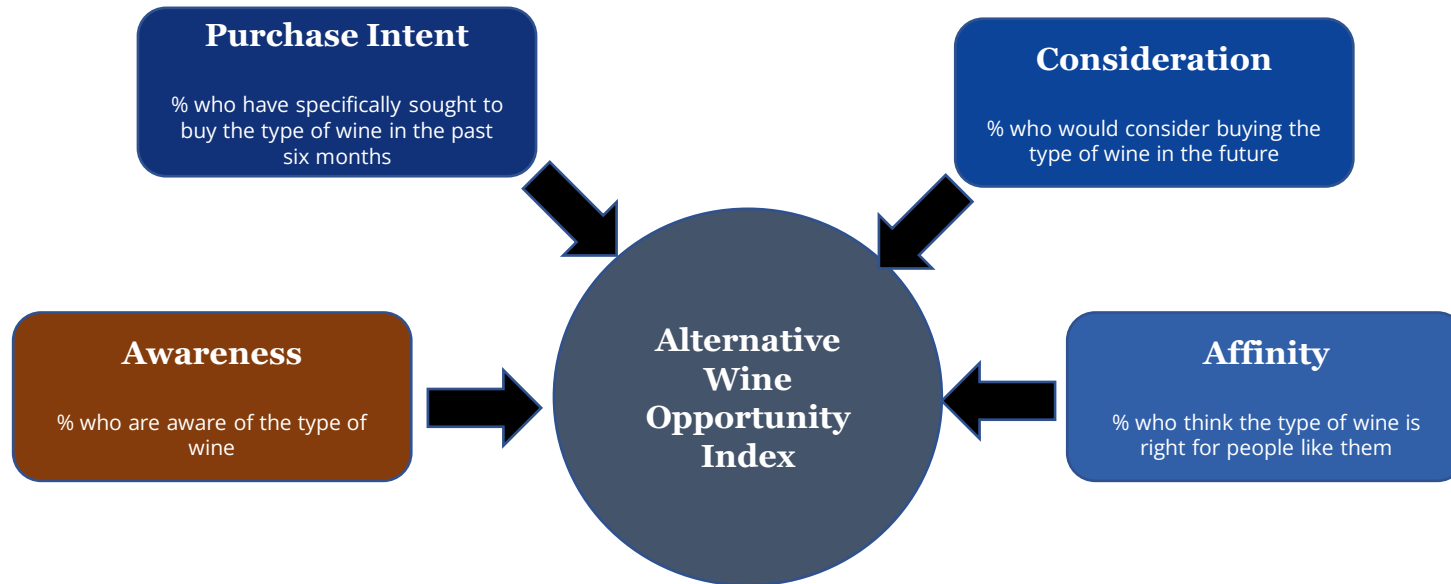
1. Opportunities for natural wine

Singapore ranks fifth for natural wine in our 2022 SOLA Opportunity Index, driven by high awareness and improving scores for consideration and affinity.

Calculating the Alternative 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 Alternative Wine Opportunity Index to be reflective of the global market opportunity



HOT TOPIC

Opportunity Index by wine type

Singapore ranks just outside the top 10 in the Opportunity Index for organic wine.

It displays strong positioning for sustainably produced and natural wine, ranking within or just outside the top five

Q: What do market experts say?

"I have a lot of people asking me for biodynamic and organic wines recently. We also carry orange wines in our restaurant and I encourage people to try them."

Sommelier, Singapore

Global Opportunity Indices

Organic wine			Sustainably produced wine			Natural wine		
		2022 opportunity index			2022 opportunity index			2022 opportunity index
1	China	66.9	1	Brazil	54.7	1	Brazil	64.5
2	Sweden	65.8	2	China	54.0	2	China	62.2
3	Germany	54.2	3	Germany	51.3	3	Argentina	59.4
4	South Korea	51.6	4=	Argentina	46.4	4	Hong Kong	58.7
5	Japan	50.0	4=	Sweden	46.4	5	Singapore	57.6
6	Ireland	48.9	6	Singapore	45.3	6	US	53.9
7	US	48.5	7	UK	44.9	7	Portugal	51.3
8	Canada	47.5	8	Portugal	43.7	8	Australia	50.7
9	Hong Kong	47.3	9=	Canada	43.0	9	New Zealand	47.4
10	Brazil	46.9	9=	Ireland	43.0	10	Canada	46.6
11	Singapore	45.0	11	US	42.9	11	Japan	45.2
12	UK	44.2	12	Australia	42.7	12=	Ireland	44.7
13	Argentina	43.2	13	New Zealand	41.1	12=	Sweden	44.7
14	New Zealand	42.9	14	South Korea	40.1	14	South Korea	42.8
15	Australia	41.1	15	Hong Kong	39.4	15	UK	41.6
16	Portugal	28.9	16	Japan	31.7	16	Germany	40.8

Source: Wine Intelligence, Vinitrac®, Oct '21, (n= 17,837), Global regular wine drinkers

Alternative Wine Opportunity Index by wine type 2022

Natural wine tops the opportunity index; environmentally-friendly and organic wine have risen through the ranks; sustainably-produced, lower-alcohol and sulphite-free wine have dropped down

Singapore Alternative Wine Opportunity Index 2022

Singapore SOLA wine opportunity index				
		2022 opportunity index	2019 score difference	2019 rank difference
1	Natural wine	57.6	3.8	=
2	Environmentally friendly wine	48.1	6.0	2↑
3	Sustainably produced wine	45.3	0.6	-1↓
4	Organic wine	45.0	3.1	1↑
5	Lower alcohol wine	44.2	0.7	-2↓
6	Wine from a carbon-neutral winery	38.0	7.9	3↑
7	Preservative free wine	37.8	0.0	-1↓
8	Fairtrade wine	35.6	-0.9	-1↓
9	Vegetarian wine	34.8	8.7	2↑
10	Non-alcoholic wine	34.6	4.1	-2↓
11	Biodynamic wine	34.6	10.4	3↑
12	Orange / skin contact wine	33.8	8.4	1↑
13	Sulphite free wine	29.7	1.1	-3↓
14	Pet Nat (Petillant Naturel)	28.3	2.5	-2↓
15	Vegan wine	27.2	9.3	=

Q: What do market experts say?

"A lot of consumers still aren't clear on what the terms organic, biodynamic and orange mean. They don't understand the differences, so I have to be careful about how I use the words."

Sommelier, Singapore

An explanation of how our Opportunity Index is calculated can be found on **slide 54**

Base = All Singaporean semi-annual wine drinkers (n=750)

↑ / ↓: Rank changed higher / lower than previous wave

Source: Wine Intelligence, Vinitrac®, Mar '19, Oct '21, (n≥600), Singaporean semi-annual wine drinkers

Wine-buying Behaviours

Singapore Wine Landscapes
2022

Wine-buying behaviours

Key takeaways

1. Stable behavioural patterns despite the pandemic

Little, if any, change was observed in wine consumption habits in both the on-trade and off-trade, with Singaporean consumers remaining remarkably consistent through the uncertainty of the pandemic

2. Singapore has high online penetration

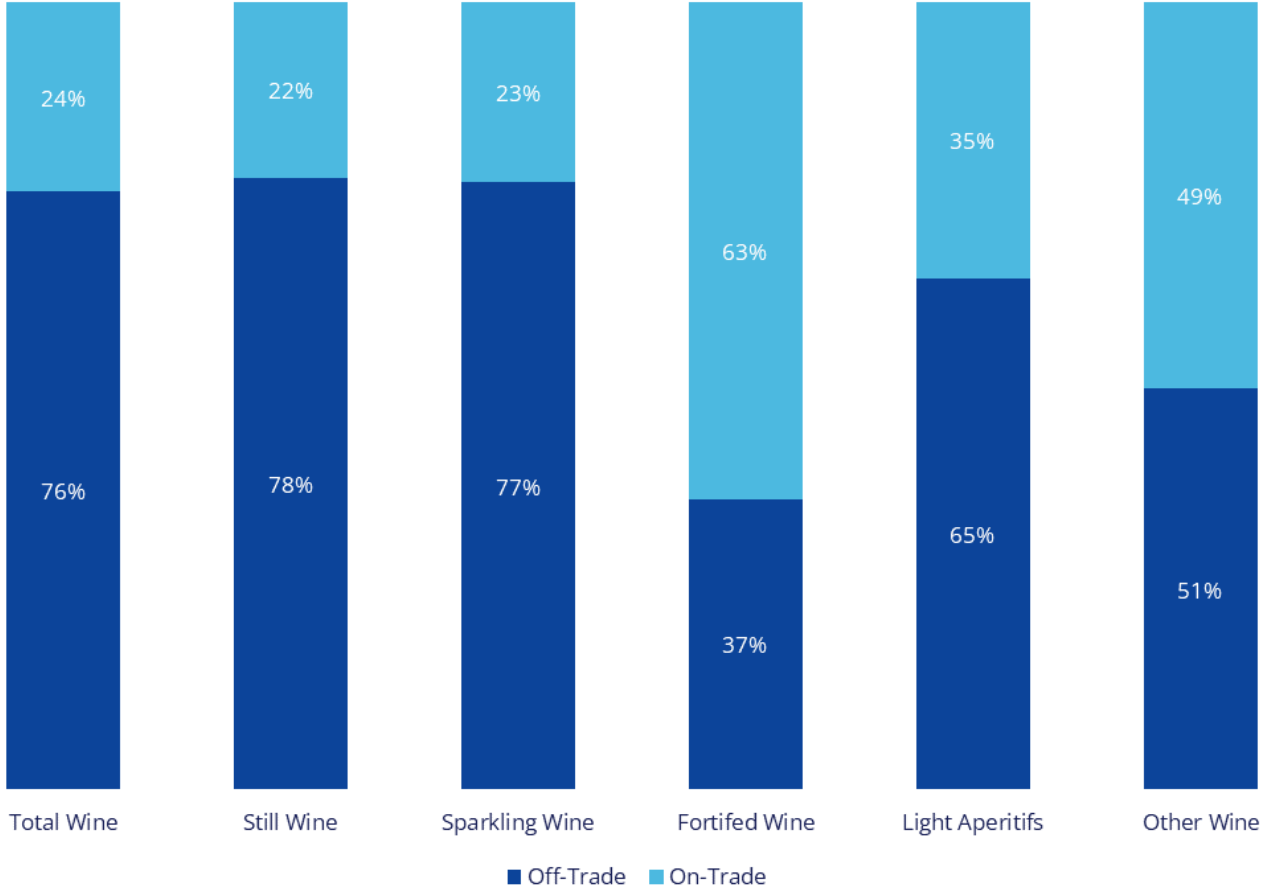
Over half of Singaporean bi-annual wine drinkers have bought wine online, but supermarkets are still the most used channels.

3. Spending increases at the highest tier

There has been a small yet significant increase in spending at the highest level (£100+) across the majority of occasions in both the on-trade and off-trade.

Off- versus on-premise consumption

The majority of the main wine types is consumed in the off-trade. Fortified and some other wines, including rice wine, lean more towards on-trade consumption



Source: IWSR

Wine-buying channel usage

Bricks and mortar supermarkets retain the biggest audience, with over half of semi-annual wine drinkers shopping for wine in this channel

Demand is greater for in-store purchases compared to online platforms from the same channels

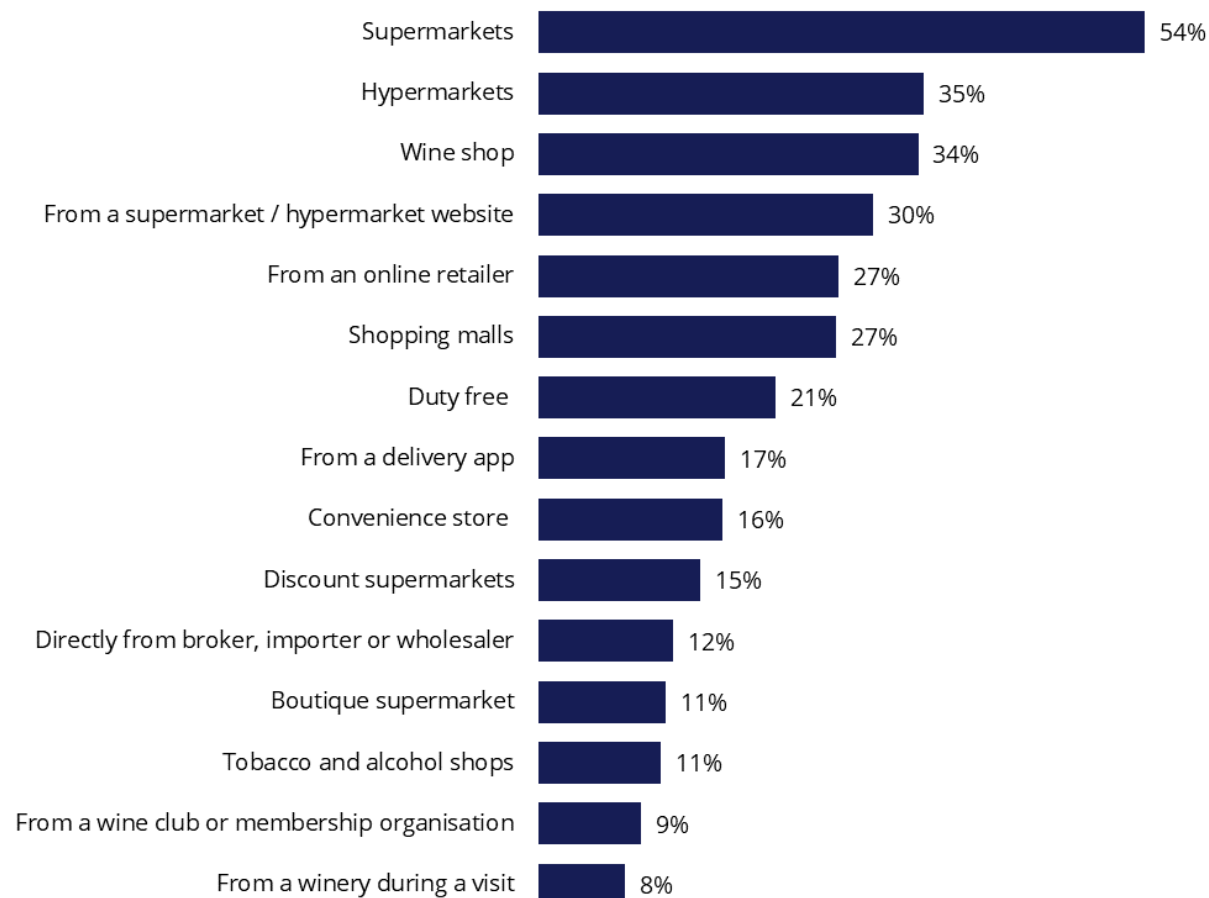
Q: What do market experts say?

“Consumers are sophisticated; they’re using apps like Vivino and Wine Searcher in supermarkets to compare prices.”

Wine consultant, Singapore

Wine-buying channel usage

% who have bought wine from the following channels in the past six months
Base = All Singaporean semi-annual wine drinkers (n=600)



Source: Wine Intelligence, Vinitrac® Singapore, Apr'22 (n=600) Singaporean semi-annual wine drinkers

Wine-buying channel usage

Channel usage has remained relatively stable since 2020. Although they saw a decline, supermarkets remain by far the most popular channel to buy alcohol. Duty-free and winery visits also recorded a decrease, probably due to Covid restrictions

E-commerce has remained stable, with over half of semi-annual wine drinkers buying wine through an online channel

Q: What do market experts say?

"Given the choice, many consumers would go to specialist shops which don't just sell supermarket wines, especially if there is a tasting available."

Wine consultant, Singapore

Wine-buying channel usage: Tracking

% who have bought wine from the following channels in the past six months
Base = All Singaporean semi-annual wine drinkers (n=600)

Ranking '22		2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
					vs. '20	vs. '21
1	Supermarkets	62%	55%	54%	↓	→
2	Hypermarkets	36%	38%	35%	→	→
3	Wine shop / Shop specialised in alcohol	39%	36%	34%	→	→
4	From a supermarket / hypermarket website	n/a	31%	30%	n/a	→
5=	From an online retailer	n/a	25%	27%	n/a	→
5=	Shopping malls	25%	26%	27%	→	→
7	Duty-free (eg at airport)	50%	22%	21%	↓	→
8	From a delivery app	n/a	14%	17%	n/a	→
9	Convenience store / Corner shop / Ordinary grocery shop	18%	15%	16%	→	→
10	Discount supermarkets	13%	13%	15%	→	→
11	Directly from broker, importer or wholesaler	12%	12%	12%	→	→
12=	Boutique supermarket	15%	12%	11%	→	→
12=	Tobacco and alcohol shops	11%	10%	11%	→	→
14	From a wine club or membership organisation	n/a	12%	9%	n/a	→
15	From a winery during a visit	n/a	13%	8%	n/a	↓

54% are online wine buyers vs **55%** in 2021

= Represents equal ranking

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

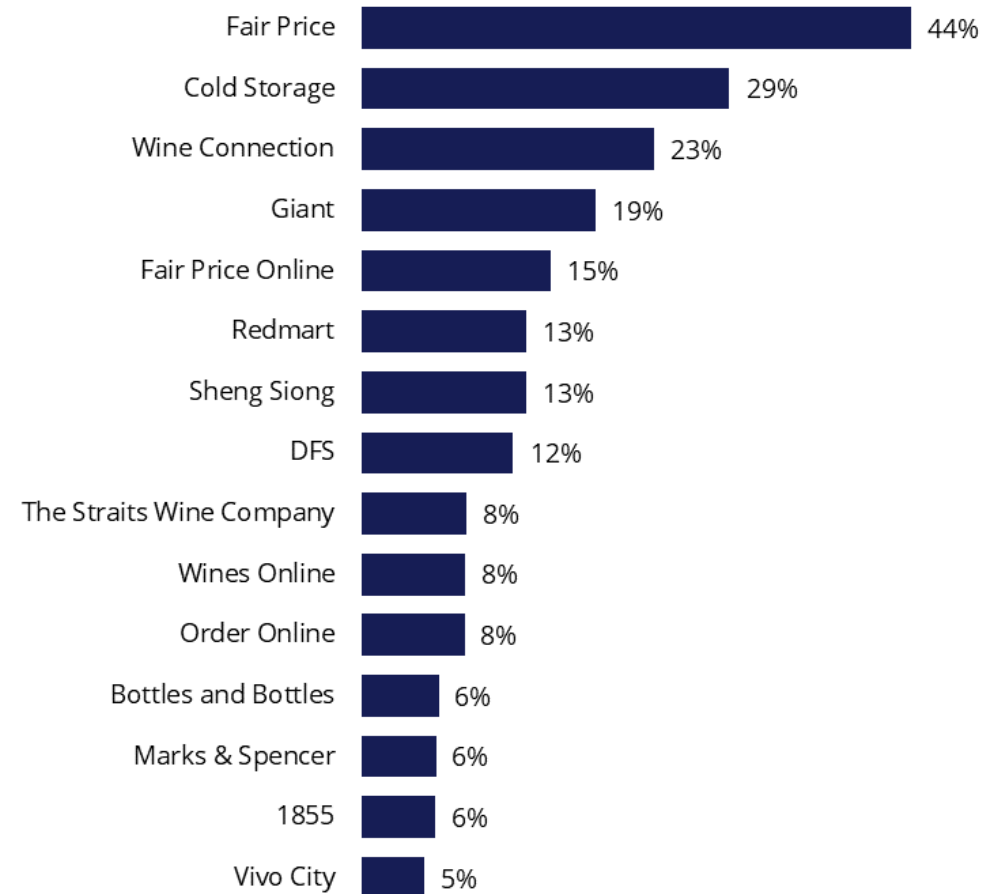
Wine-buying retailer usage

Fair Price, the largest supermarket chain in Singapore, is the number one retailer for wine purchases, used by two in five Singaporean semi-annual wine drinkers.

Wine Connection is the largest specialist wine retailer by audience share

Wine-buying retailer usage: Top 15

% who mainly use the following retailers to buy wine
Base = All Singaporean semi-annual wine drinkers (n=600)



Source: Wine Intelligence, Vinitrac® Singapore, Apr'22 (n=600) Singaporean semi-annual wine drinkers

Wine-buying retailer usage

Fair Price maintains its leading position as the retailer Singaporean consumers are most likely to buy wine from, by a healthy distance from the competition

Online platforms have seen an increase over the long-term, including specialty wine sites, although this continues to be a relatively small proportion of consumers

Q: What do market experts say?

"There has been a swap from face to face to online buying. Online stores can offer memberships, different types of wines, and provide delivery."

Wine Consultant, Singapore

Wine-buying retailer usage: Tracking, top 15

% who mainly use the following retailers to buy wine
Base = All Singaporean semi-annual wine drinkers (n=600)

Ranking '22		2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
					vs. '20	vs. '21
1	Fair Price	47%	45%	44%	→	→
2	Cold Storage	38%	32%	29%	↓	→
3	Wine Connection	21%	21%	23%	→	→
4	Giant	15%	19%	19%	→	→
5	Fair Price Online	14%	15%	15%	→	→
6=	Redmart	15%	14%	13%	→	→
6=	Sheng Siong	8%	9%	13%	↑	↑
8	DFS	26%	8%	12%	n/a	↑
9=	The Straits Wine Company	8%	8%	8%	→	→
9=	Wines Online	4%	7%	8%	↑	→
9=	Order Online	8%	8%	8%	→	→
12=	Bottles and Bottles	5%	6%	6%	→	→
12=	Marks & Spencer	6%	8%	6%	→	→
12=	1855	5%	4%	6%	→	→
15=	Vivo City	5%	7%	5%	→	→

= Represents equal ranking

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Consumption frequency

Wine consumption frequency has remained consistent year-on-year

There is little difference between generational group behaviour compared with the average Singaporean wine drinker, with the exception of Gen Z

Wine consumption frequency: Tracking

% who usually drink wine at the following frequency
Base = All Singaporean semi-annual wine drinkers (n=600)

	2020	2021	2022	Tracking	
	(n=600)	(n=600)	(n=600)	vs. '20	vs. '21
Most days / every day	4%	7%	6%	➔	➔
2-5 times a week	28%	29%	26%	➔	➔
About once a week	27%	26%	25%	➔	➔
1-3 times a month	22%	21%	24%	➔	➔

Wine consumption frequency: by generation

% who usually drink wine at the following frequency
Base = All Singaporean semi-annual wine drinkers (n=600)

	Singaporean semi-annual wine drinkers	18-24 Gen Z	25-39 Millennials	40-54 Gen X	55-64 Boomers
	(n=600)	(n=40)	(n=227)	(n=190)	(n=143)
Most days / every day	6%	7%	4%	10%	4%
2-5 times a week	26%	20%	26%	32%	18%
About once a week	25%	11%	30%	23%	26%
1-3 times a month	24%	34%	24%	20%	26%

Grey shading = low sample size (n<50)

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

⬆️/⬆️: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

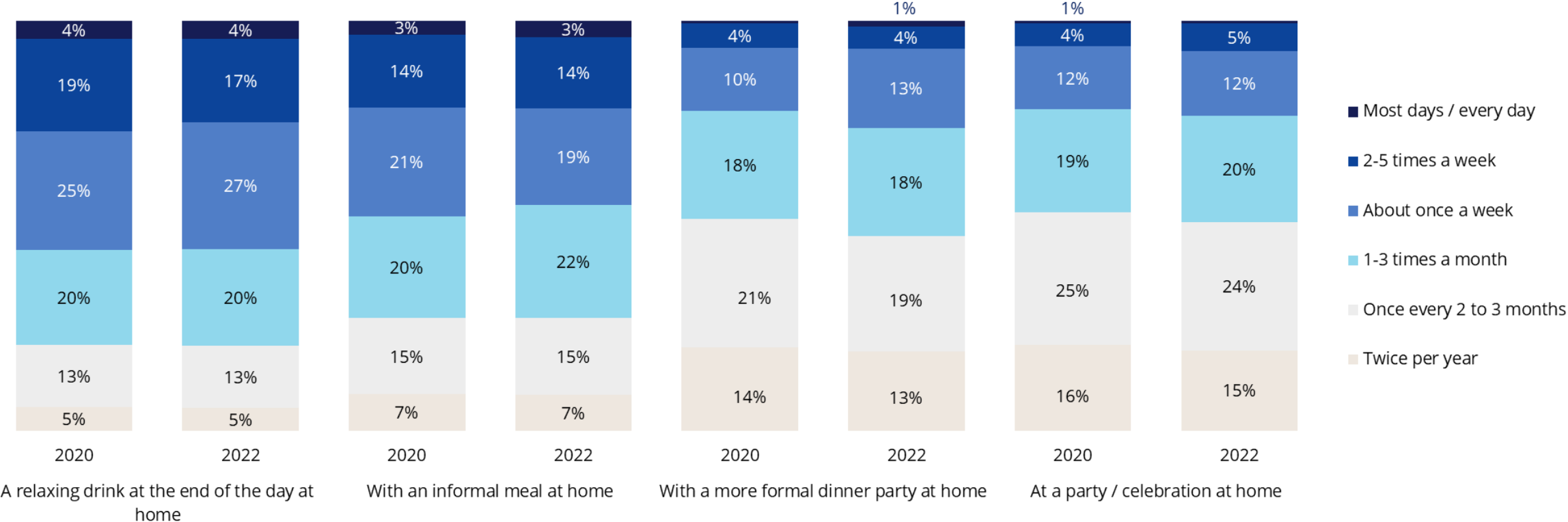
Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Off-trade consumption frequency

Most Singaporean consumers did not significantly change their at-home wine consumption habits between 2020 and 2022

Off-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the off-trade



▲/▼: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

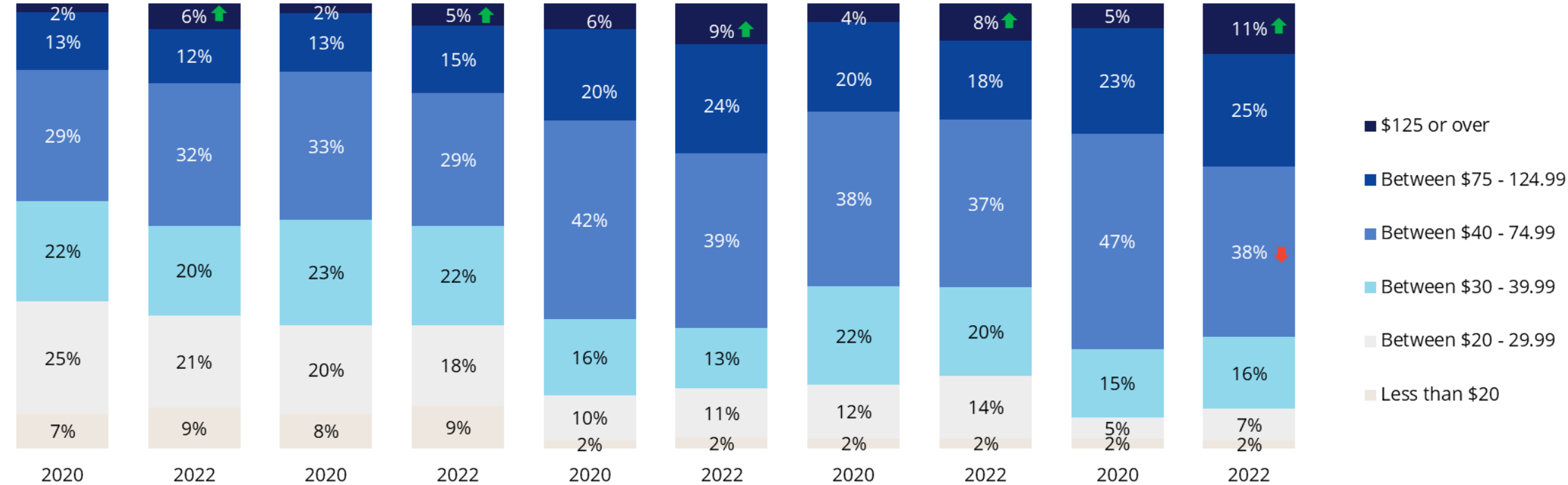
Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600) and Apr '22 (n=600) Singaporean semi-annual wine drinkers

Off-trade spend

Consistent growth in spend of more than \$125 across all occasions, form a small base

Off-trade: Wine spend per bottle by occasion

Base = Those who buy wine in the off-trade



↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

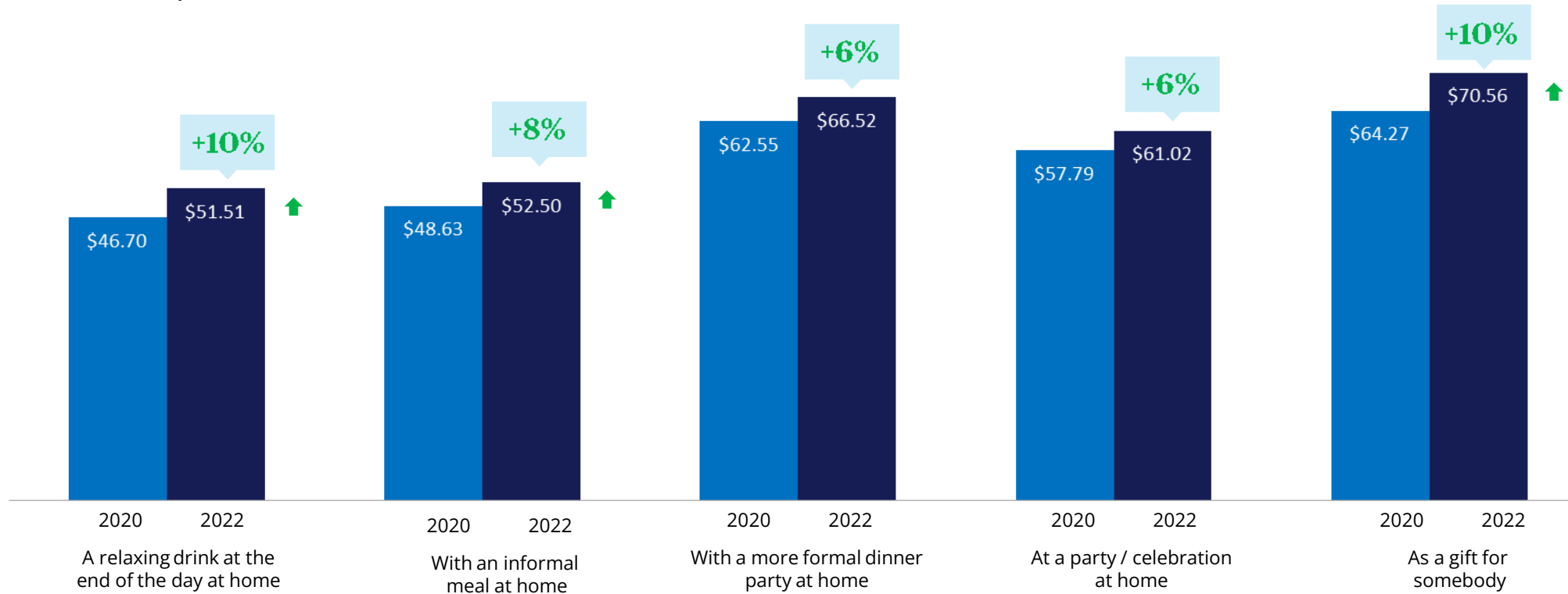
Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600) and Apr '22 (n=600) Singaporean semi-annual wine drinkers

Off-trade spend

Recalled spend is high, reaching over \$50 on all occasions

Off-trade: Typical spend per bottle by occasion

Base = Those who buy wine in the off-trade



↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600) and Apr '22 (n=600) Singaporean semi-annual wine drinkers

On-trade consumption

Wine consumption in the on-trade has remained stable overall with the exception of restaurant consumption, which has seen long-term increases

Perhaps unsurprisingly, Millennials are the group who are the most likely to drink wine in the on-trade, including in restaurants; boomers are much less likely to do so

Q: What do market experts say?

"Before the pandemic, people rarely ate dinner out at restaurants, maybe once a month or so. Now it's more like once a week."

Wine Consultant, Singapore

Wine purchase in on-trade

% who buy wine in a bar, pub, restaurant, club or karaoke
Base = All Singaporean semi-annual wine drinkers (n=600)

On-trade location		2020	2021	2022	Tracking	
		(n=600)	(n=600)	(n=600)	vs. '20	vs. '21
Bar	Yes	58%	61%	61%	→	→
	No	42%	39%	39%	→	→
Restaurant	Yes	71%	76%	76%	↑	→
	No	29%	24%	24%	↓	→
Club or Karaoke	Yes	41%	40%	42%	→	→
	No	59%	60%	58%	→	→

Wine purchase in on-trade: by generation

% who buy wine in a bar, pub, restaurant, club or karaoke
Base = All Singaporean semi-annual wine drinkers (n=600)

On-trade location		Singaporean semi-annual wine drinkers	18-24 Gen Z	25-39 Millennials	40-54 Gen X	55-64 Boomers
		(n=600)	(n=40)	(n=227)	(n=190)	(n=143)
Bar	Yes	61%	68%	75%	60%	39%
	No	39%	32%	25%	40%	61%
Restaurant	Yes	76%	90%	85%	77%	57%
	No	24%	10%	15%	23%	43%
Club or Karaoke	Yes	42%	41%	49%	46%	29%
	No	58%	59%	51%	54%	71%

Grey shading = low sample size (n<50)

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

↑ / ↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

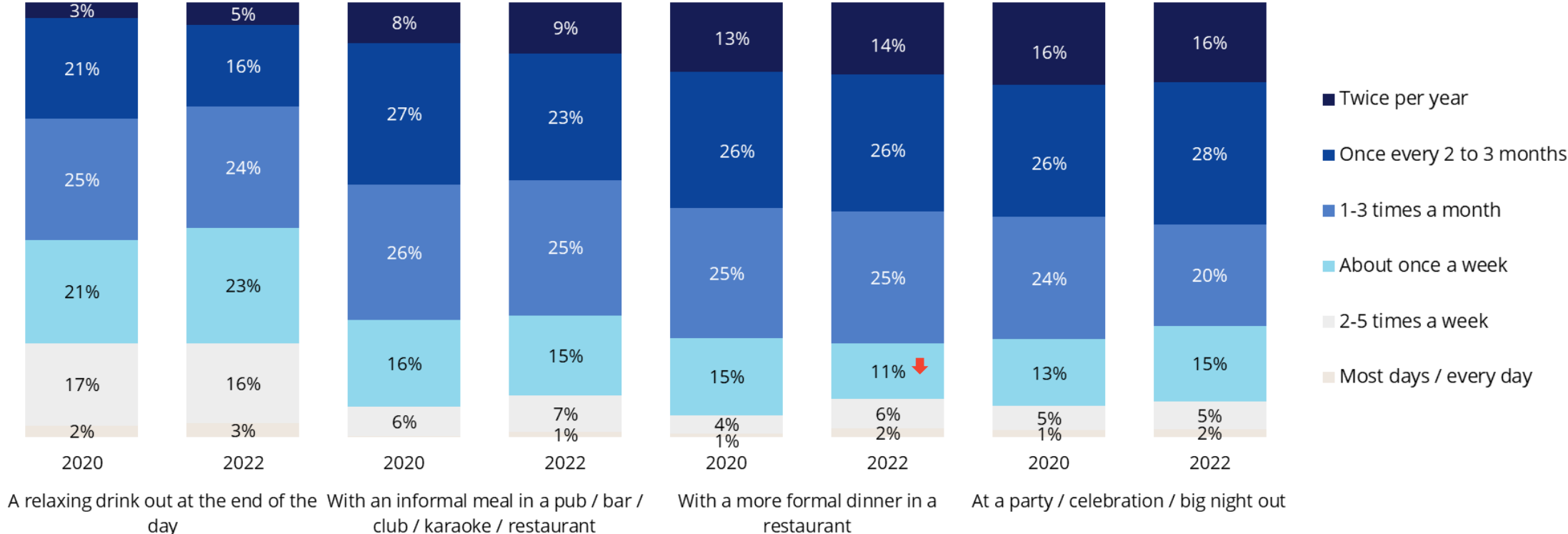
Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

On-trade consumption frequency

Little change in on-trade consumption frequency over the past two years among Singaporean semi-annual wine drinkers

On-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the on-trade



▲/▼: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

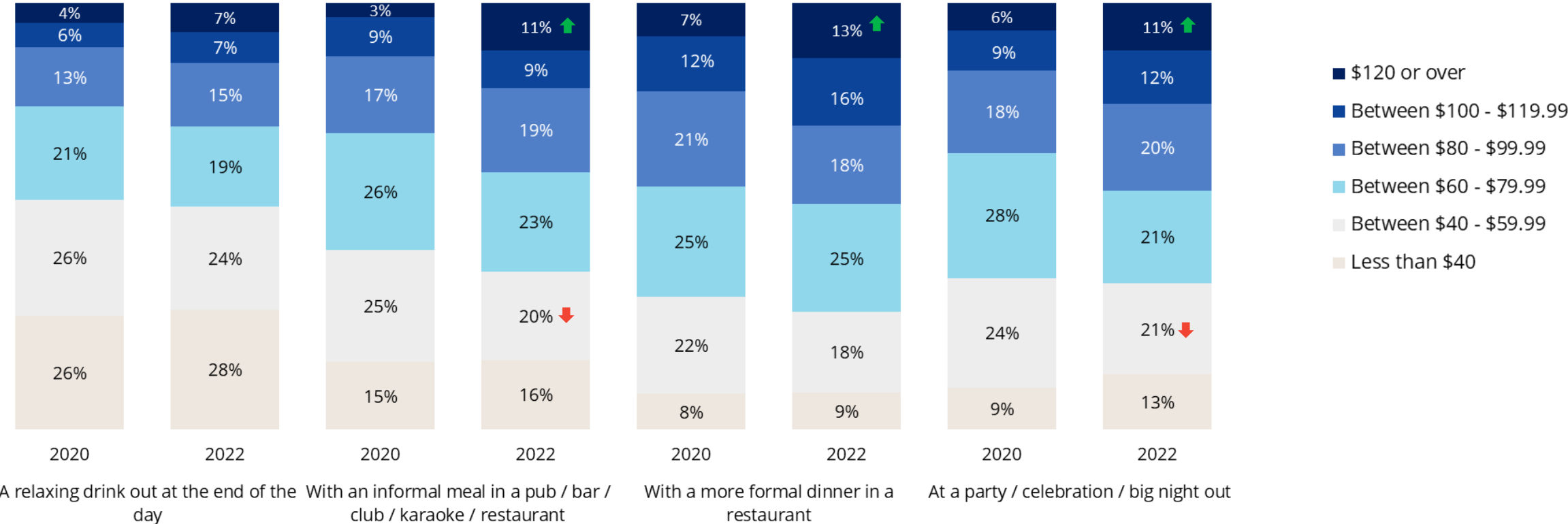
Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600) and Apr '22 (n=600) Singaporean semi-annual wine drinkers

On-trade spend

Increase in spend at the highest levels for all occasions but a general decline in mid / lower range price brackets

On-trade: Wine spend per bottle by occasion

Base = Those who buy wine in the on-trade



↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

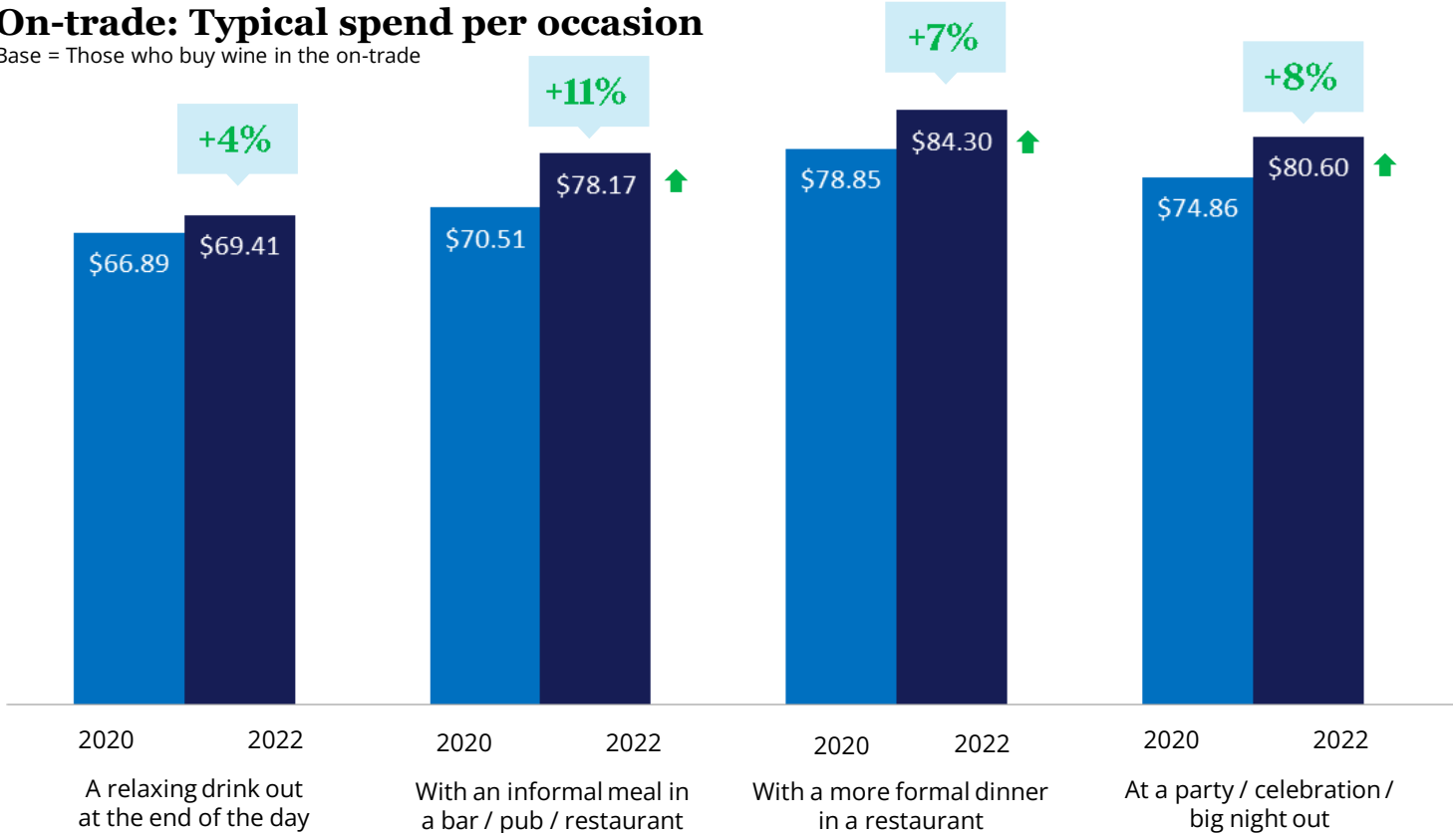
Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600) and Apr '22 (n=600) Singaporean semi-annual wine drinkers

On-trade spend

Spend is up significantly across all occasions but less so for a relaxing drink at the end of the day

On-trade: Typical spend per occasion

Base = Those who buy wine in the on-trade



Q: What do market experts say?

"In spite of inflation, people are willing to spend more money on wine."

Sommelier, Singapore

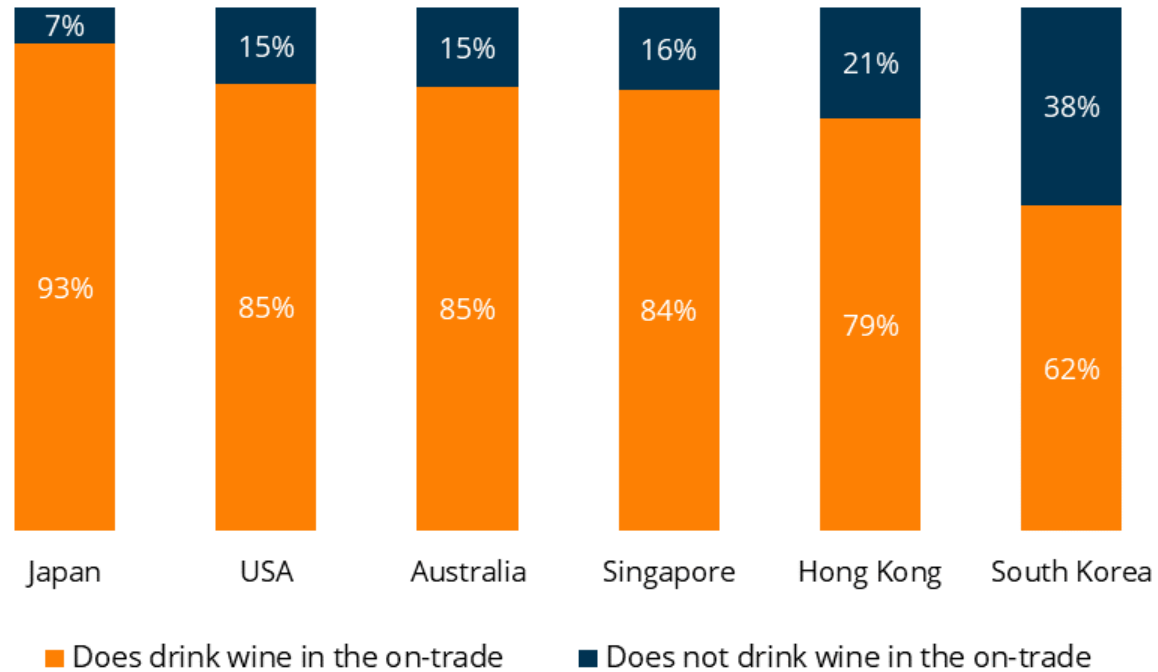
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600) and Apr '22 (n=600) Singaporean semi-annual wine drinkers

Wine on-trade global comparisons (1/2)

Singaporeans like to engage with the on-trade, at comparable levels to the US and Australia

Wine on-trade: differences by market

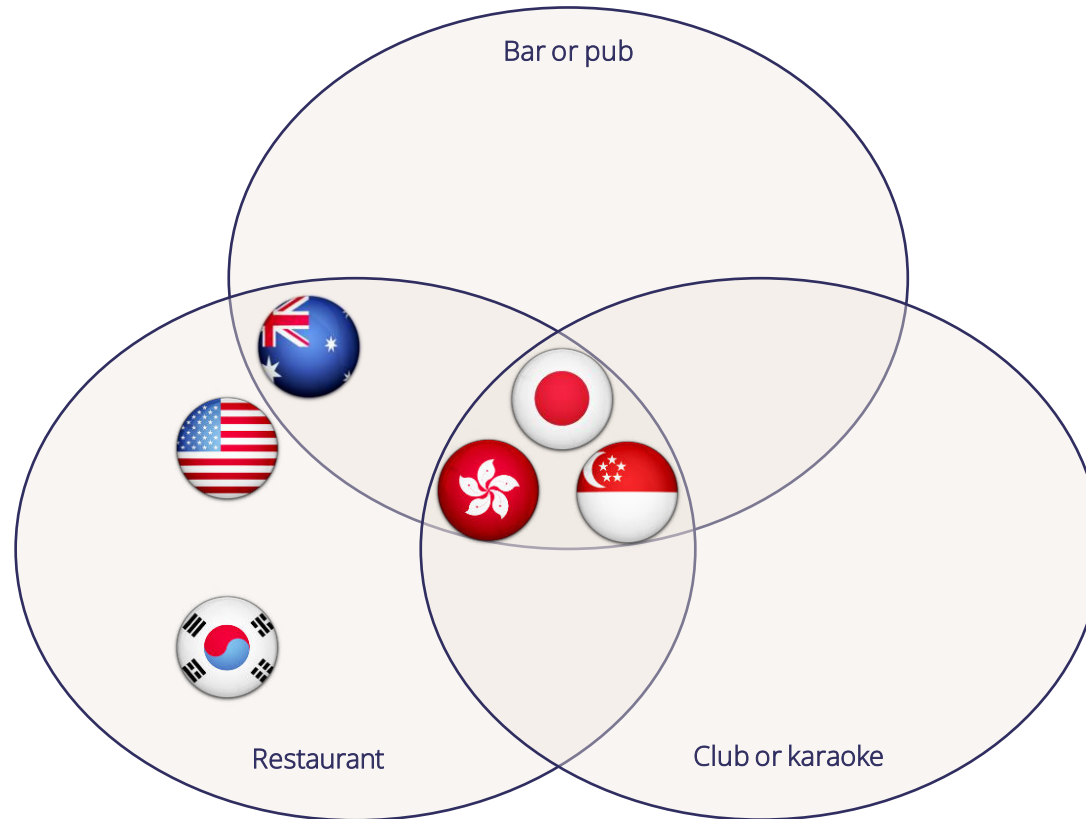


Source: Wine Intelligence, Vinitrac®, Apr '22, (n≥600), Global wine drinkers

Wine on-trade global comparisons (2/2)

Singaporeans tend to drink wine across all trade channels, similar to Hong Kong and Japan

Wine on-trade: differences by market



Source: Wine Intelligence, Vinitrac®, Apr '22, (n≥600), Global wine drinkers

Wine Views and Attitudes

Singapore Wine Landscapes

2022

Wine views and attitudes

Key takeaways

1. Wine knowledge in long-term decline

Despite a general long-term increase of involvement in wine and a stable confidence index, wine knowledge in Singapore is decreasing, with the Wine Knowledge Index now down to 23.8

2. Involvement is up

Despite a fall in knowledge levels, the proportion of semi-annual wine drinkers who are highly involved in the category has grown since 2020

Attitudes towards wine

The majority of Singaporean semi-annual wine drinkers enjoy trying new wines, particularly Millennials

Older consumers are more likely to stick with what they know they enjoy

Q: What do market experts say?

“A lot of younger consumers have an open mind to explore. They want to taste different styles, different trends, or anything the merchant is able to offer.”

Wine consultant, Singapore

Attitudes towards wine: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All Singaporean semi-annual wine drinkers (n=600)

	2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking vs. '20	vs. '21
I enjoy trying new and different styles of wine on a regular basis	49%	46%	49%	➔	➔
I don't mind what I buy so long as the price is right	37%	42%	39%	➔	➔
I know what I like and I tend to stick to what I know	14%	11%	12%	➔	➔

Attitudes towards wine by generation

% who 'agree' or 'strongly agree' with the following statements
Base = All Singaporean semi-annual wine drinkers (n=600)

	Singaporean semi-annual wine drinkers (n=600)	18-24 Gen Z (n=40)	25-39 Millennials (n=227)	40-54 Gen X (n=190)	55-64 Boomers (n=143)
I enjoy trying new and different styles of wine on a regular basis	49%	40%	58%	48%	38%
I don't mind what I buy so long as the price is right	39%	48%	33%	41%	42%
I know what I like and I tend to stick to what I know	12%	13%	8%	12%	20%

Grey shading = low sample size (n<50)

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

⬆️/⬆️: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Wine involvement

The proportion of those who are highly involved with wine has increased significantly since 2020

Wine involvement: Tracking

Base = All Singaporean semi-annual wine drinkers (n=600)

	2020	2021	2022	Tracking	
	(n=600)	(n=600)	(n=600)	vs. '20	vs. '21
High involvement	35%	42%	43%	↑	→
Medium involvement	44%	41%	39%	→	→
Low involvement	21%	16%	18%	→	→

Q: What do market experts say?

“During Covid, consumers saved money and haven't been able to spend it because of restrictions. Now, they're indulging in wine in terms of both spend and volume.”

Wine consultant, Singapore

Wine involvement by generation

Base = All Singaporean semi-annual wine drinkers (n=600)

	All Singaporean semi-annual wine drinkers	18-24 Gen Z	25-39 Millennials	40-54 Gen X	55-64 Boomers
	(n=600)	(n=40)	(n=227)	(n=190)	(n=143)
High involvement	43%	33%	49%	38%	43%
Medium involvement	39%	37%	36%	46%	35%
Low involvement	18%	30%	15%	16%	22%

Grey shading = low sample size (n<50)

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

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

Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Involvement and perceived expertise (1)

Seeking the best quality wines within the budget continues to be the top goal for consumers; many are not confident about their knowledge, though this is changing

Involvement and perceived expertise in wine: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All Singaporean semi-annual wine drinkers (n=600)

Ranking '22		2020	2021	2022	Tracking	
		(n=600)	(n=600)	(n=600)	vs. '20	vs. '21
1	I always look for the best quality wines I can get for my budget	73%	74%	75%	→	→
2=	I like to take my time when I purchase a bottle of wine	67%	72%	74%	↑	→
2=	Drinking wine gives me pleasure	75%	76%	74%	→	→
4	Deciding which wine to buy is an important decision	66%	63%	67%	→	→
5	It's often worth spending more to get a better wine	63%	64%	65%	→	→
6	Generally speaking, wine is an expensive drink	56%	63%	59%	→	→
7	Generally speaking, wine is reasonably priced	49%	57%	58%	↑	→
8	Compared to others, I know less about the subject of wine	50%	52%	57%	↑	→
9	Wine is important to me in my lifestyle	52%	58%	55%	→	→
10	I have a strong interest in wine	50%	55%	54%	→	→
11	I feel competent about my knowledge of wine	39%	48%	46%	↑	→

= Represents equal ranking

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Involvement and perceived expertise (2)

Millennials are the most likely generational group to feel competent in their knowledge of wine with over half of this group indicating that they are

Involvement and perceived expertise in wine by generation

% who 'agree' or 'strongly agree' with the following statements

Base = All Singaporean semi-annual wine drinkers (n=600)

	All Singaporean semi-annual wine drinkers (n=600)	18-24 Gen Z (n=40)	25-39 Millennials (n=227)	40-54 Gen X (n=190)	55-64 Boomers (n=143)	
1	I always look for the best quality wines I can get for my budget	75%	77%	76%	71%	79%
2=	I like to take my time when I purchase a bottle of wine	74%	65%	74%	71%	79%
2=	Drinking wine gives me pleasure	74%	68%	74%	75%	72%
4	Deciding which wine to buy is an important decision	67%	73%	67%	67%	67%
5	It's often worth spending more to get a better wine	65%	64%	64%	62%	71%
6	Generally speaking, wine is an expensive drink	59%	62%	62%	57%	56%
7	Generally speaking, wine is reasonably priced	58%	68%	63%	54%	54%
8	Compared to others, I know less about the subject of wine	57%	64%	57%	56%	57%
9	Wine is important to me in my lifestyle	55%	44%	59%	56%	51%
10	I have a strong interest in wine	54%	40%	59%	54%	50%
11	I feel competent about my knowledge of wine	46%	35%	56%	46%	35%

Grey shading = low sample size

= Represents equal ranking

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

Source: Wine Intelligence, Vinitrac® Singapore, Apr'22 (n=600) Singaporean semi-annual wine drinkers

Wine knowledge and confidence indices

While knowledge continues to decrease over time, a corresponding significant decline in wine confidence has not yet been observed

Wine knowledge index: Tracking

Base = All Singaporean semi-annual wine drinkers (n=600)

	2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
				vs. '20	vs. '21
Knowledge Index	27.1	26.0	23.8	↓	↓

Wine knowledge index (0-100) is calculated based on consumer-reported awareness of wine-growing regions and wine brands.

*Wine knowledge index is the 'objective' measurement of consumer knowledge about wine.

-3.2
Index
change

Wine confidence index: Tracking

Base = All Singaporean semi-annual wine drinkers (n=600)

	2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
				vs. '20	vs. '21
Confidence Index	49.4	50.3	49.6	→	→

Wine confidence index (0-100) is calculated based on the extent to which consumers feel competent about their wine knowledge. Wine confidence index uses consumers' answers to three attitudinal statements: 1) I feel competent about my knowledge of wine / 2) Compared to others, I know less about the subject of wine / 3) I don't understand much about wine.

**Wine confidence index is the 'subjective' measurement of consumer confidence about their wine knowledge.

+0.2
Index
change

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Wine-drinking motivations

Celebrating a special occasion and relaxing are the top motivations for Singaporean consumers. Boomers are particularly motivated to drink wine with food while Gen Zs see it as a sophisticated drink

Wine drinking motivations: Top 15

% who selected the following as reasons why they drink wine

Base = All Singaporean semi-annual wine drinkers (n=600)

Ranking '22		All Singaporean semi-annual wine drinkers (n=600)	18-24 Gen Z (n=40)	25-39 Millennials (n=227)	40-54 Gen X (n=190)	55-64 Boomers (n=143)
1	To celebrate special occasions	52%	58%	49%	46%	64%
2	Drinking wine makes me feel relaxed	45%	33%	38%	51%	53%
3	Wine enhances food and meals	41%	47%	34%	39%	54%
4=	Drinking wine can be good for my health	34%	28%	30%	28%	53%
4=	Wine is about sharing with a partner / close friend or family member	34%	42%	33%	29%	42%
6=	Wine helps create a warm / friendly atmosphere	33%	25%	33%	27%	45%
6=	I really love the taste of wine	33%	38%	31%	32%	35%
8	Wine is about sharing something with others	28%	33%	25%	30%	31%
9	I treat myself with wine at the end of the day	26%	31%	23%	33%	21%
10	Wine is a refreshing drink	24%	26%	23%	21%	29%
11=	I like learning about new wines	21%	24%	23%	19%	19%
11=	Most of my friends drink wine	21%	24%	23%	18%	20%
13	I like shopping / choosing wines to drink	19%	13%	21%	18%	16%
14	It makes people sophisticated	17%	42%	23%	11%	10%
15	It makes me feel individual and unique	16%	22%	19%	14%	14%

= Represents equal ranking

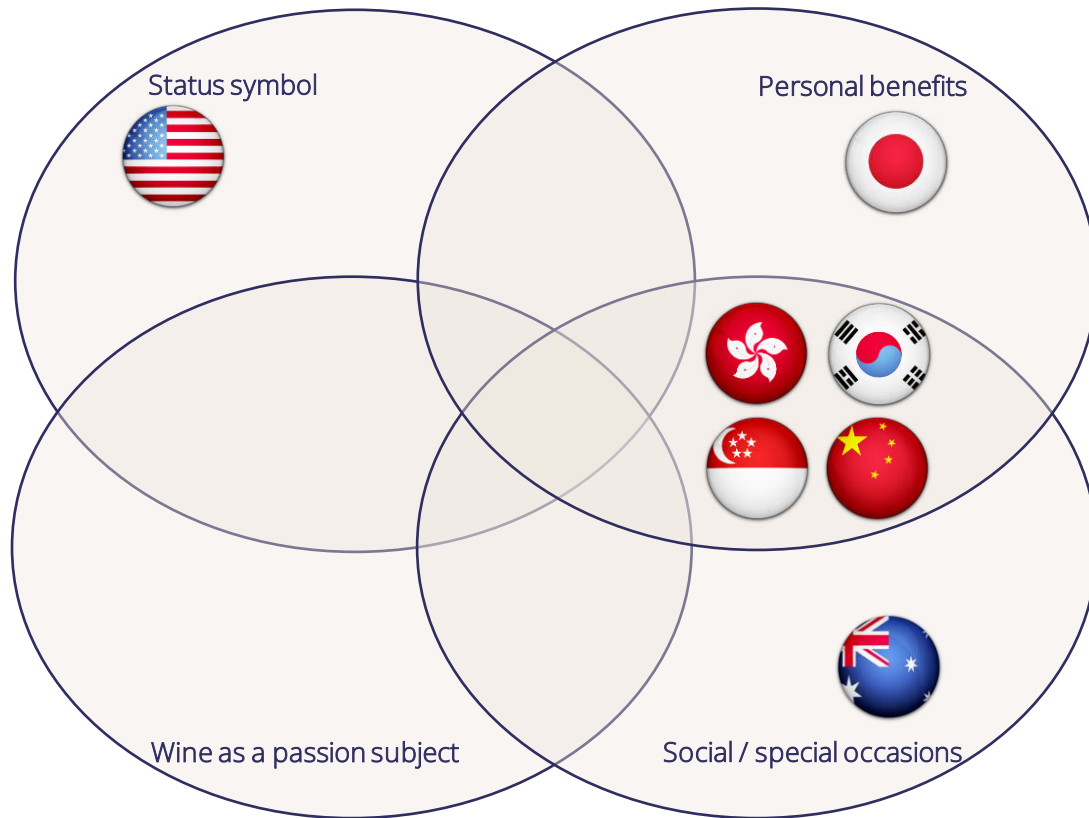
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Singapore, Apr'22 (n=600) Singaporean semi-annual wine drinkers

Wine-drinking motivations global comparison

Wine-drinking motivations in Singapore mirror those seen in other East and Southeast Asian markets, with personal benefits and social occasions the top drivers

Top wine motivation: differences by market



Status symbol
It makes me feel individual and unique
It makes people sophisticated
Wine is a fashionable drink
Most of my friends drink wine

Personal benefits
Wine enhances food and meals
Drinking wine makes me feel relaxed
Drinking wine can be good for my health
I really love the taste of wine
I treat myself with wine at the end of the day
Wine is a refreshing drink

Wine as a passion subject
I like shopping / choosing wines to drink
I like learning about new wines

Social / special occasions
To celebrate special occasions
Wine helps create a warm / friendly atmosphere
Wine is about sharing with a partner / close friend or family member
Wine is about sharing something with others

Source: Wine Intelligence, Vinitrac®, Apr '22, (n≥600), Global wine drinkers

Wine-buying choice cues

Singaporean consumers are most likely to focus on promotional offers. A wine's suitability with food and its style or taste are also more important than where the wine comes from

Wine choice cues: Tracking

% who indicate each of the following factors is 'important' or 'very important' when buying wine
Base = All Singaporean semi-annual wine drinkers (n=600)

Ranking '22		2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
					vs. '20	vs. '21
1	Promotional offer (eg price discount)	74%	74%	78%	→	→
2	Wine that matches or complements food	72%	74%	74%	→	→
3=	Taste or wine style descriptions displayed on the shelves or on wine labels	66%	73%	71%	↑	→
3=	A brand I am aware of	69%	70%	71%	→	→
5=	The country of origin (eg France, Australia, Spain, Chile, USA, etc)	66%	72%	69%	→	→
5=	Grape variety (eg Cabernet Sauvignon, Chardonnay, etc)	68%	72%	69%	→	→
7	Recommendation by friend or family	64%	64%	66%	→	→
8	The region of origin	64%	68%	65%	→	→
9	Alcohol content	61%	65%	64%	→	→
10	Recommendations from shop staff or shop leaflets	54%	55%	57%	→	→
11	Recommendation by wine critic or writer	49%	51%	54%	→	→
12=	Appeal of the bottle and / or label design	49%	51%	52%	→	→
12=	Recommendation by wine guide books	46%	52%	52%	↑	→
14	Whether or not the wine has won a medal or award	39%	44%	40%	→	→

= Represents equal ranking

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Hot Topic: Wine Packaging and Closures

**Singapore Wine Landscapes
2022**

Wine packaging and closures

Key takeaways

1. Conventional packaging dominates

Cans are the most popular packaging type outside of glass bottles, yet just 21% are aware of them and only 8% have bought one.

2. More positive perceptions of alternative closures

Singaporean wine drinkers favour cork closures, but a growing proportion like buying wine with screw-caps and synthetic cork.

HOT TOPIC

Packaging type consumption / awareness

The standard glass bottle format dominates the market, far ahead of all other packaging types for wine

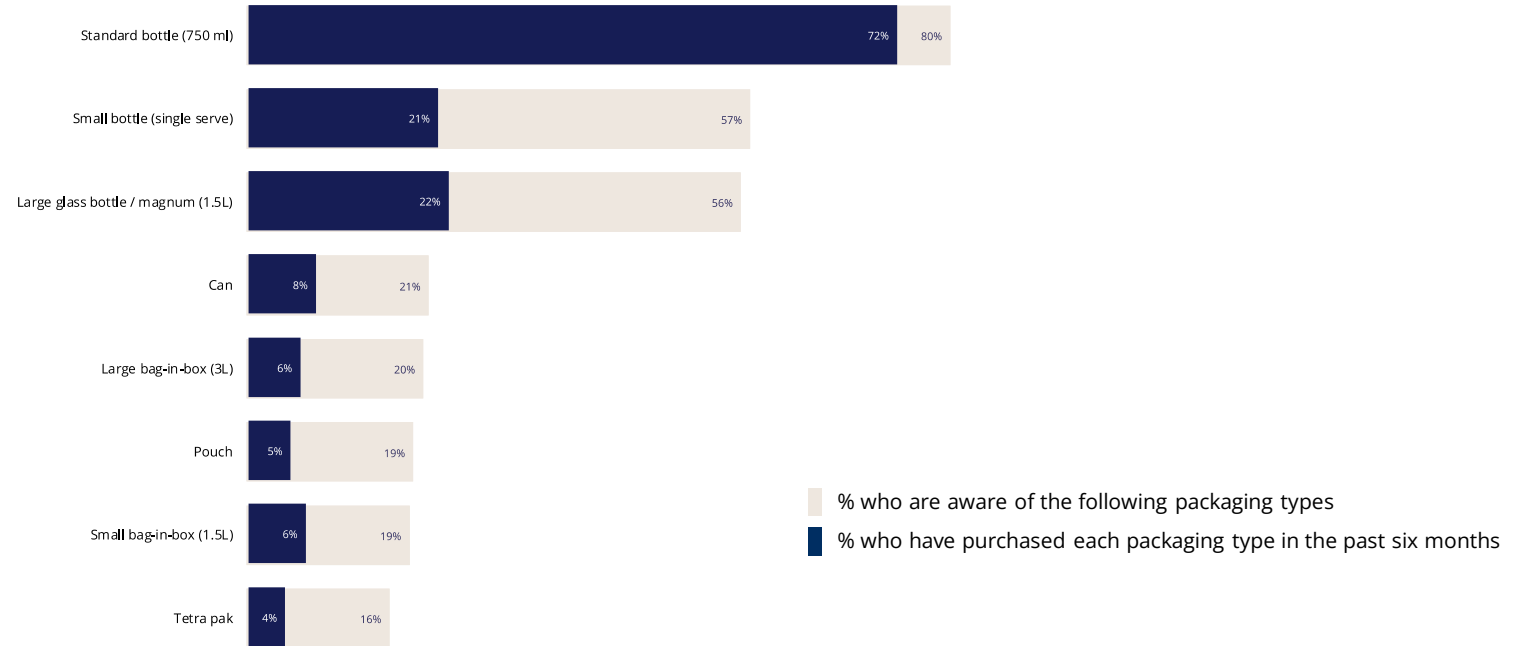
Q: What do market experts say?

"It has to be the standard 750ml glass bottle. Magnums and odd sizes and formats don't really work for the retail market. Bag in box? Definitely not."

Wine Marketer, Singapore

Packaging types: Awareness and consumption levels

% of those who are aware of or have purchased wine in the following packaging types
Base = All Singaporean semi-annual wine drinkers (n=600)



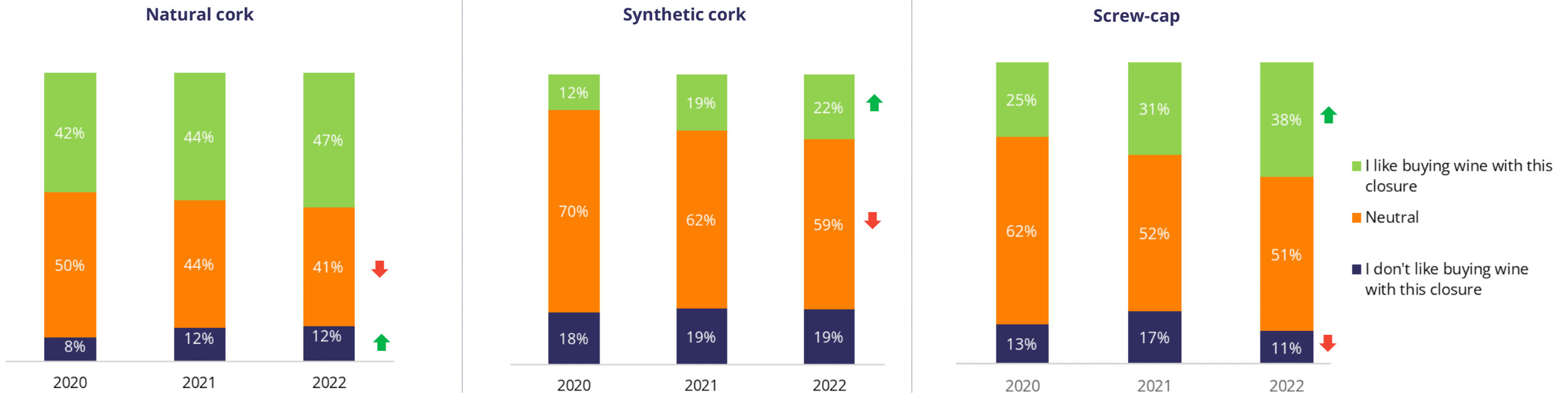
Source: IWSR estimate
Source: Wine Intelligence, Vinitrac® Singapore, Apr'22 (n=600) Singaporean semi-annual wine drinkers

Wine closure preferences

Although natural cork is most popular, there is greater acceptance of synthetic corks and screw-caps

Wine closure preferences

% who hold the following view of each wine closure type
Base = All Singaporean semi-annual wine drinkers (n=600)



↑ / ↓: Statistically significantly higher / lower than 2020 wave at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Views on wine closure types

Each type of closure has distinct associations for drinkers. Screw-cap is seen as practical; synthetic cork is innovative; natural cork means quality

Wine closure types imagery: positioning map

% who associate the following statements with each type of wine closure
Base = All Singaporean semi-annual wine drinkers (n=600)



Source: Wine Intelligence, Vinitrac® Singapore, Apr '22 (n=600) Singaporean semi-annual wine drinkers

Hot Topic: Consumer Sentiment

Singapore Wine Landscapes
2022

Consumer sentiment

Key takeaways

1. Singaporeans feel relatively secure financially

A net positive proportion of Singaporean wine drinkers feel positively about their personal finances and the future generally.

2. Reported wine consumption is stable

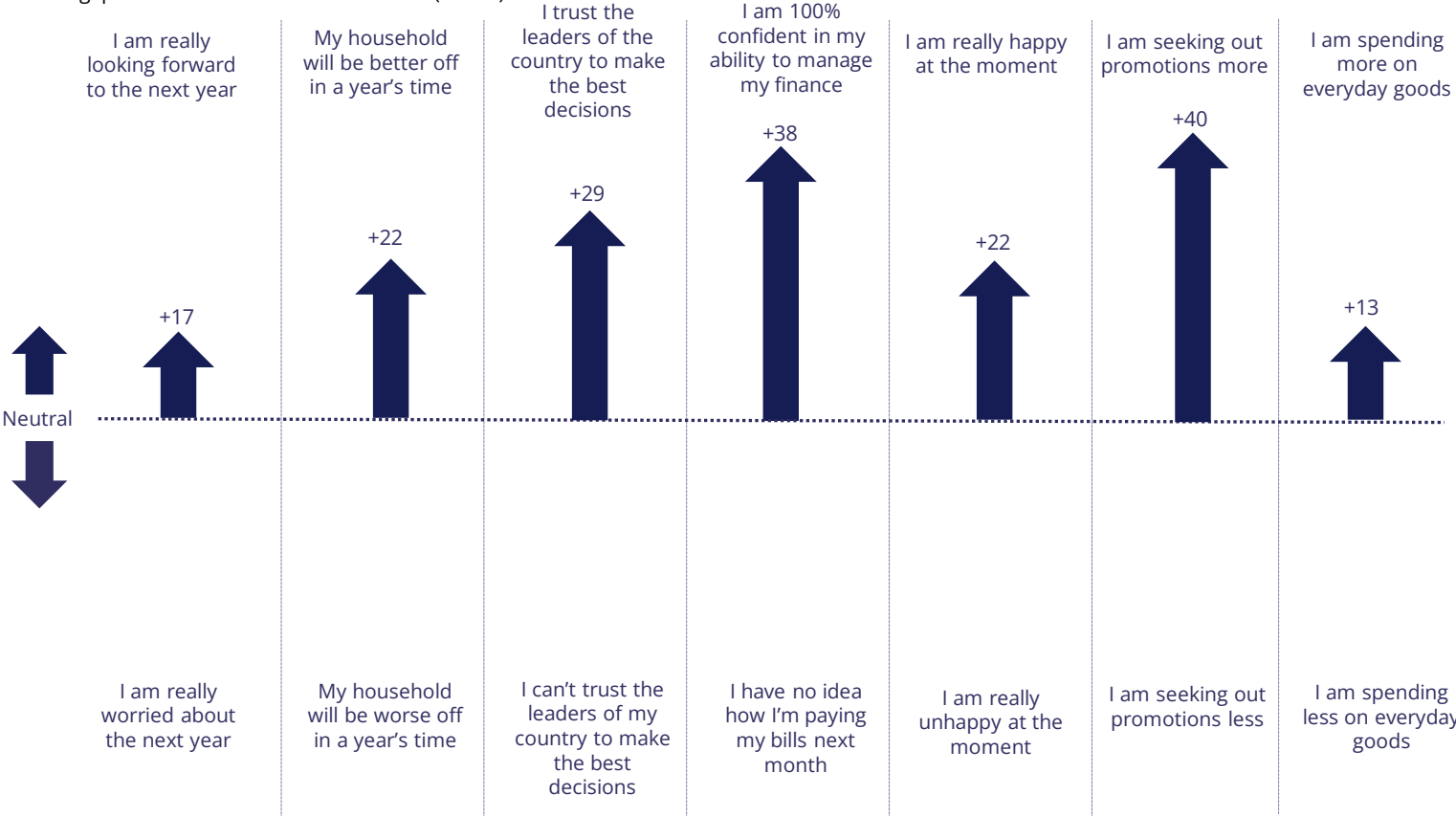
This positive outlook hasn't translated into self-recorded increases in wine purchases or spend per bottle.

Consumer sentiment

Singaporean wine drinkers feel relatively at ease with their financial situation, although many remain keen to seek out promotions

Cost of living impact

Net score of % who agree with bottom statement subtracted from the % who agree with the top statement
 Base = All Singaporean semi-annual wine drinkers (n=600)



Demographic insights

- Perhaps unsurprisingly, Boomers (those 55-64), are the generational cohort that are the most likely to feel financial security, with over 6 in 10 reporting that they are 100% comfortable in their ability to manage their finances

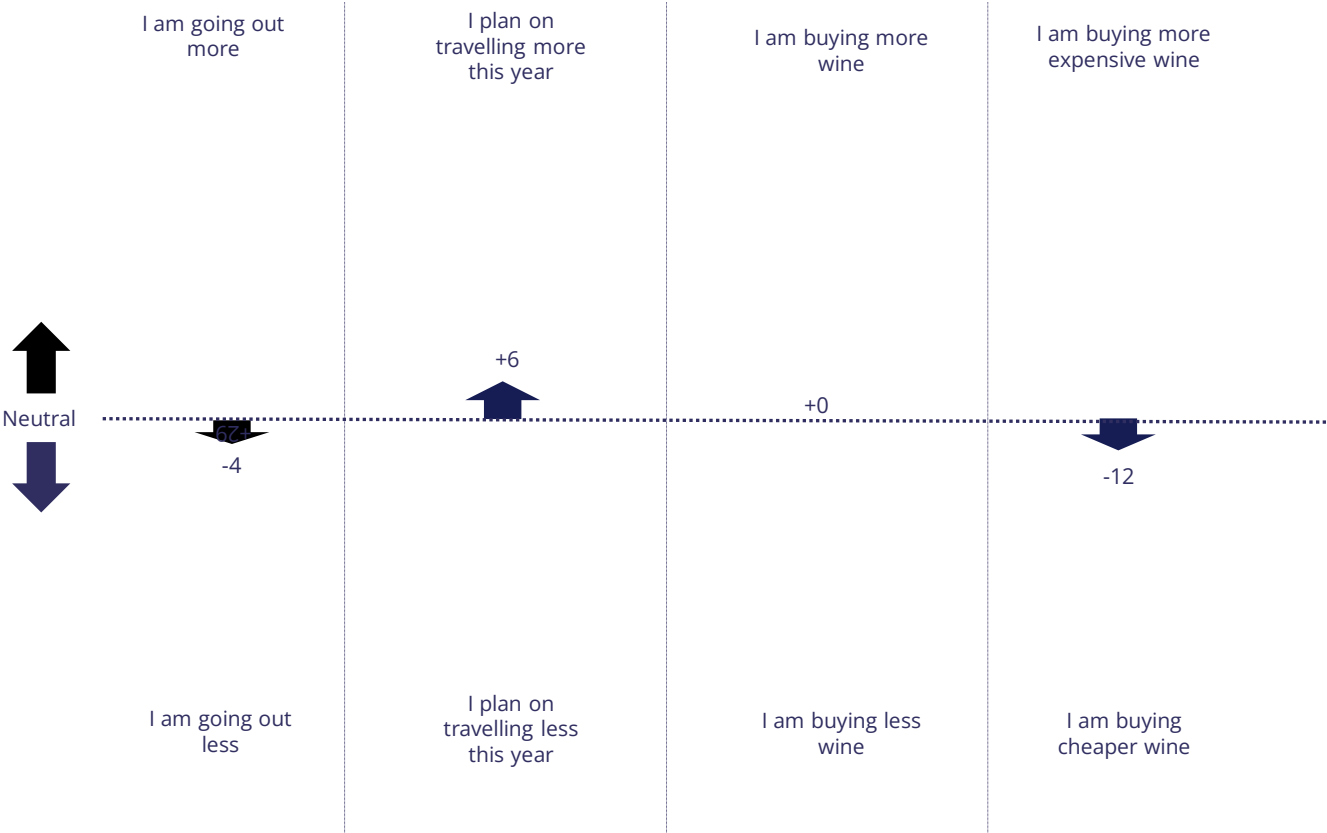
Source: Wine Intelligence, Vinitrac® Singapore, Apr '22 (n=600) Singaporean semi-annual wine drinkers

Consumer sentiment

Although there is little overall unease about personal finances, consumers are making moves to spend less on going out and alcohol

Cost of living impact

Net score of % who agree with bottom statement subtracted from the % who agree with the top statement
 Base = All Singaporean semi-annual wine drinkers (n=600)



Demographic insights

- Compared with the average Singaporean semi-annual wine drinker, Millennials are the generational cohort who are the most likely to maintain their spending habits. They are less likely to report scaling back on travel plans and over a third report buying more wine rather than less

Source: Wine Intelligence, Vinitrac® Singapore, Apr '22 (n=600) Singaporean semi-annual wine drinkers

Brand Health

Singapore Wine Landscapes

2022

Brand Health

Key takeaways

1. Australian brands dominate the Singaporean market

As in 2021, the three most powerful brands in the Singaporean market remain Jacob's Creek, Wolf Blass and Penfolds, all of which have improved their Brand Power Index scores

2. Brand metrics remain stable

There have been minimal changes in brand health metrics for most brands in the market from 2020 and 2021

Global Wine Brand Power Index

Brand health measures included in the index

Awareness	% who have heard of each brand (when prompted with a list of brand names with logos) Base = All wine drinkers	Brand awareness index
Purchase	% who have bought each brand in the past 3 months Base = All wine drinkers	Brand purchase index
Conversion	% who have bought each brand in the past 3 months Base = Those who have heard of each brand	
Consideration	% who would consider buying each brand Base = Those who have heard of each brand	
Affinity	% who think each brand is right for people like them Base = Those who have heard of each brand	Brand connection index
Recommendation	% who would recommend each brand to a friend Base = Those who have heard of each brand	

**Wine Brand
Power Index**

Singapore Brand Power

The top three most powerful brands in the market remain stable from 2021

1st



2nd



3rd



Singapore Brand Power Index 2022

No change in the top six, with score improvements for the all of them

Ranking '22		Final Index	Tracking vs 2021	Score difference vs 2021	Ranking '22		Final Index	Tracking vs 2021	Score difference vs 2021
1	Jacob's Creek	97.4	=	5.4	16	Inniskillin	44.6	↑+6	-2.0
2	Wolf Blass	94.7	=	6.7	17	Viña Maipo	44.3	↑+3	-3.9
3	Penfolds	84.8	=	1.7	18	Fat Bird	44.2	↑+24	9.4
4	Yellow Tail	77.9	=	4.5	19	Cheval des Andes	43.5	↓-1	-7.0
5	Cloudy Bay	73.3	=	5.9	20	Nederburg	43.0	↓-10	-14.4
6	Brown Brothers	68.7	=	1.3	21	J.P. Chenet	42.8	↑+14	2.6
7=	Rosemount Estate	58.2	↑+1	-1.7	22	Carlo Rossi	41.9	↑+3	-3.0
7=	Lindeman's	58.2	↓-1	-4.3	23	Les Dauphins	41.7	↓-6	-9.7
9	Casillero del Diablo	56.1	=	-1.9	24	Carmen	41.4	↓-8	-10.2
10	French Cellars	55.1	↑+3	1.5	25=	McGuigan	41.3	n/a	n/a
11	Pierre Jean	53.2	=	-2.1	25=	Woodbridge	41.3	↑+10	1.2
12	Matua	49.3	↑+7	-0.4	27	Luis Felipe Edwards	41.3	↑+10	1.6
13	George Wyndham	48.1	↑+1	-4.6	28	Eaglehawk	40.4	↓-4	-4.7
14	Mouton Cadet	46.4	↑+9	1.1	29	Kim Crawford	39.5	↓-1	-3.5
15	Hardys	46.0	↓-3	-8.7	30	De Bortoli	39.0	↑+4	-1.4

This table is from our 2022 Brand Power Index, using data from October 2021 and February 2022. This is calculated annually and does not come from the same data set as the rest of the report

Source: Wine Intelligence, Vinitrac® Singapore, Oct '21 - Feb '22 Singaporean semi-annual wine drinkers

Brand health: Consumption / awareness

Australian brands dominate the market, making up over half of the top 15 and all the brands within the top five

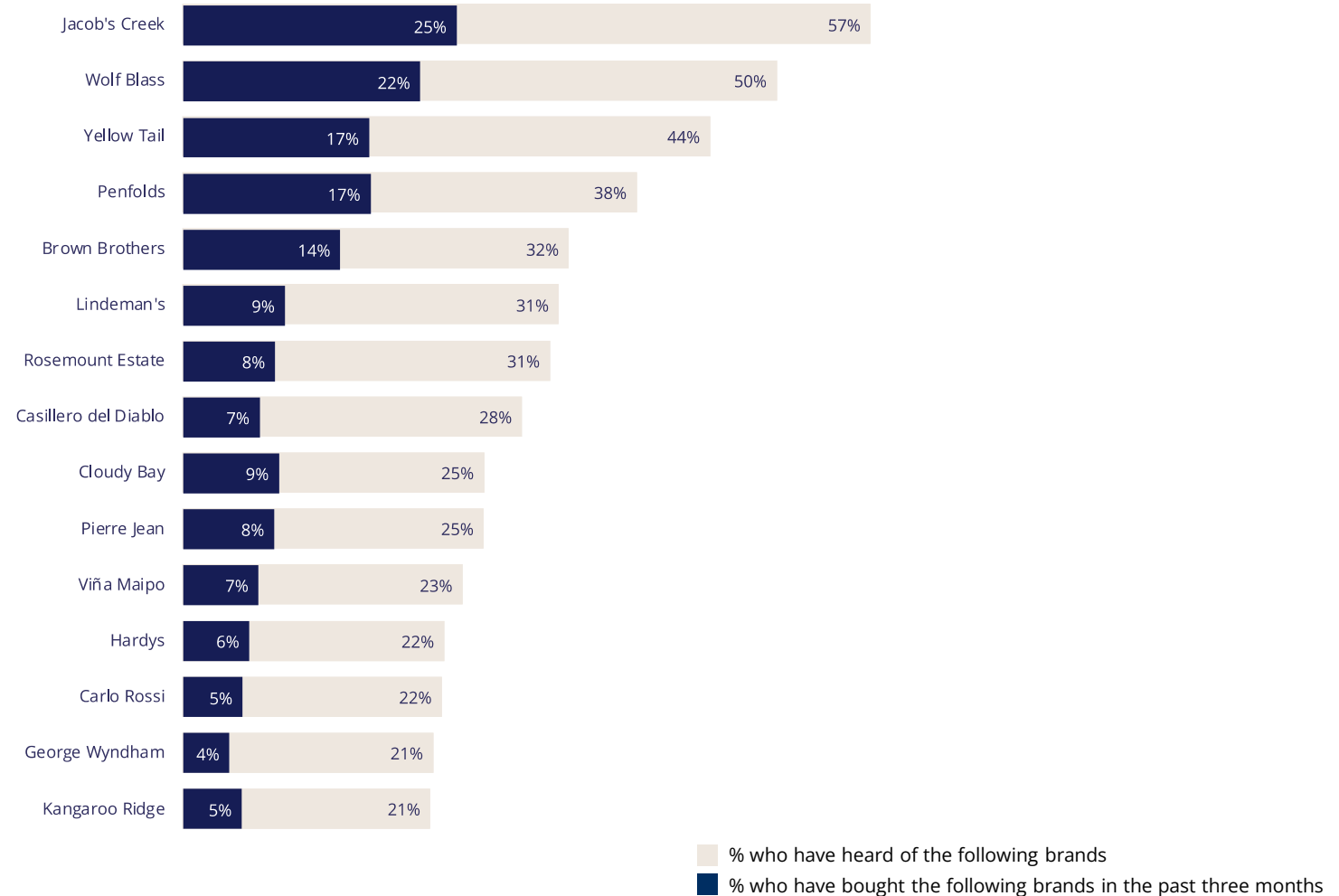
Q: What do market experts say?

“Brands are successful because they are successful globally. They do the same things well and they consistently deliver well for a good price.”

Head of wine at a members' club, Singapore

Brand health: Top 15 awareness and consumption levels

Base = All Singaporean semi-annual wine drinkers (n=600)



Source: Wine Intelligence, Vinitrac® Singapore, Apr'22 (n=600) Singaporean semi-annual wine drinkers

Brand awareness

Awareness levels appear to be stabilising after considerable declines seen for a number of brands in the top 25, including market leaders Jacob's Creek and Yellow Tail

Awareness: Tracking

% who have heard of the following brands

Base = All Singaporean semi-annual wine drinkers (n=600)

Ranking '22		2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
					vs. '20	vs. '21
1	Jacob's Creek	65%	60%	57%	↓	→
2	Wolf Blass	55%	50%	50%	→	→
3	Yellow Tail	51%	45%	44%	↓	→
4	Penfolds	39%	40%	38%	→	→
5	Brown Brothers	32%	31%	32%	→	→
6=	Lindeman's	37%	31%	31%	↓	→
6=	Rosemount Estate	38%	36%	31%	↓	↓
8	Casillero del Diablo	34%	33%	28%	↓	→
9=	Cloudy Bay	36%	27%	25%	↓	→
9=	Pierre Jean	30%	26%	25%	↓	→
11	Viña Maipo	23%	22%	23%	→	→
12=	Hardys	25%	21%	22%	→	→
12=	Carlo Rossi	26%	26%	22%	→	→
14=	George Wyndham	24%	21%	21%	→	→
14=	Kangaroo Ridge	18%	22%	21%	→	→

Ranking '22		2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
					vs. '20	vs. '21
16=	Eaglehawk	24%	24%	20%	→	→
16=	French Cellars	24%	23%	20%	→	→
16=	Carmen	22%	22%	20%	→	→
19=	Woodbridge	26%	20%	18%	↓	→
19=	Cheval des Andes	24%	22%	18%	↓	→
19=	Fat Bird	14%	16%	18%	→	→
22=	Nederburg	21%	20%	17%	↓	→
22=	J.P. Chenet	19%	17%	17%	→	→
22=	Gallo Family Vineyards	18%	18%	17%	→	→
22=	Mouton Cadet	20%	20%	17%	→	→
26=	Maison Castel	17%	21%	16%	→	↓
26=	Les Dauphins	16%	18%	16%	→	→
26=	Long Flat	18%	18%	16%	→	→
29=	Luis Felipe Edwards	14%	14%	14%	→	→
29=	Matua	17%	17%	14%	→	→

Results for all 68 brands available in the data table

= Represents equal ranking

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Brand purchase

In line with awareness levels, Jacob's Creek and Yellow Tail saw declines in purchase measures. However, overall purchase rates remained stable

Purchase: Tracking

% who have bought the following brands in the past three months

Base = All Singaporean semi-annual wine drinkers (n=600)

Ranking '22		2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
					vs. '20	vs. '21
1	Jacob's Creek	30%	27%	25%	↓	→
2	Wolf Blass	25%	23%	22%	→	→
3=	Penfolds	18%	21%	17%	→	→
3=	Yellow Tail	21%	19%	17%	↓	→
5	Brown Brothers	12%	12%	14%	→	→
6=	Lindeman's	11%	11%	9%	→	→
6=	Cloudy Bay	14%	10%	9%	↓	→
8=	Rosemount Estate	11%	9%	8%	→	→
8=	Pierre Jean	8%	8%	8%	→	→
10=	Casillero del Diablo	9%	9%	7%	→	→
10=	Viña Maipo	7%	6%	7%	→	→
12=	Hardys	4%	5%	6%	→	→
12=	French Cellars	8%	8%	6%	→	→
14=	Cheval des Andes	6%	5%	5%	→	→
14=	Carmen	5%	5%	5%	→	→

Ranking '22		2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
					vs. '20	vs. '21
14=	Carlo Rossi	6%	6%	5%	→	→
14=	Kangaroo Ridge	4%	6%	5%	→	→
14=	Woodbridge	6%	4%	5%	→	→
19=	Matua	6%	5%	4%	→	→
19=	George Wyndham	6%	3%	4%	→	→
19=	Eaglehawk	6%	6%	4%	→	→
19=	Robert Mondavi	5%	3%	4%	→	→
19=	Ravenswood	3%	3%	4%	→	→
19=	Les Dauphins	3%	6%	4%	→	→
19=	Mouton Cadet	4%	5%	4%	→	→
19=	Concha y Toro	2%	2%	4%	↑	→
27=	Gallo Family Vineyards	3%	6%	3%	→	→
27=	Nederburg	5%	5%	3%	→	→
27=	Inniskillin	5%	5%	3%	→	→
27=	Carta Vieja	3%	2%	3%	→	→

Results for all 68 brands available in the data table

= Represents equal ranking

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

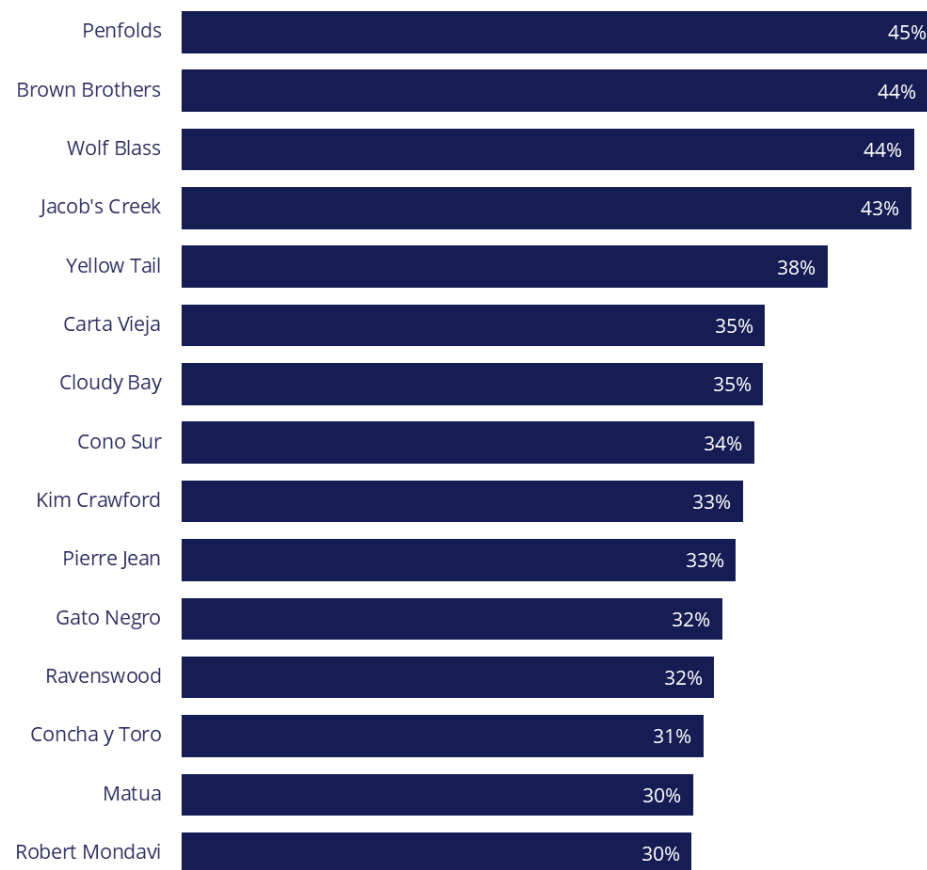
Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Brand conversion

Conversion rates are similar among the top five, suggesting that once aware of brands, consumers are open to purchasing a variety

Conversion: Top 15

% who have bought the following brands in the past three months
Base = Those who have heard of each brand



Source: Wine Intelligence, Vinitrac® Singapore, Apr'22 (n=600) Singaporean semi-annual wine drinkers

Brand conversion: Tracking

Despite declines in awareness, Jacob's Creek and Yellow Tail have not seen corresponding declines in their conversion metrics, with this measure stable for all brands over the past year

Conversion: Tracking

% who have bought the following brands in the past three months

Base = Those who have heard of each brand

Ranking '22		2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
					vs. '20	vs. '21
1	Penfolds	46%	52%	45%	→	→
2=	Brown Brothers	36%	38%	44%	→	→
2=	Wolf Blass	46%	47%	44%	→	→
4	Jacob's Creek	46%	44%	43%	→	→
5	Yellow Tail	42%	42%	38%	→	→
6=	Carta Vieja	20%	22%	35%	→	→
6=	Cloudy Bay	39%	38%	35%	→	→
8	Cono Sur	27%	30%	34%	→	→
9=	Kim Crawford	22%	38%	33%	→	→
9=	Pierre Jean	26%	32%	33%	→	→
11=	Gato Negro	n/a	n/a	32%	n/a	n/a
11=	RavensWood	24%	24%	32%	→	→
13	Concha y Toro	13%	18%	31%	↑	→
14=	Matua	35%	31%	30%	→	→
14=	Robert Mondavi	28%	23%	30%	→	→

Ranking '22		2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
					vs. '20	vs. '21
14=	Cheval des Andes	27%	24%	30%	→	→
17=	Lindeman's	30%	35%	29%	→	→
17=	Viña Maipo	30%	27%	29%	→	→
17=	French Cellars	35%	34%	29%	→	→
20	Hardys	17%	26%	28%	↑	→
21=	Carmen	25%	25%	27%	→	→
21=	Rosemount Estate	29%	26%	27%	→	→
23	Kangaroo Ridge	22%	26%	26%	→	→
24	Carlo Rossi	22%	24%	25%	→	→
25=	McGuigan	n/a	n/a	24%	n/a	n/a
25=	Casillero del Diablo	26%	27%	24%	→	→
25=	Woodbridge	23%	22%	24%	→	→
25=	Inniskillin	30%	30%	24%	→	→
29=	Santa Rita	24%	19%	23%	→	→
29=	Los Vascos	n/a	n/a	23%	n/a	n/a

Results for all 68 brands available in the data table

Grey shading = low sample size
= Represents equal ranking

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

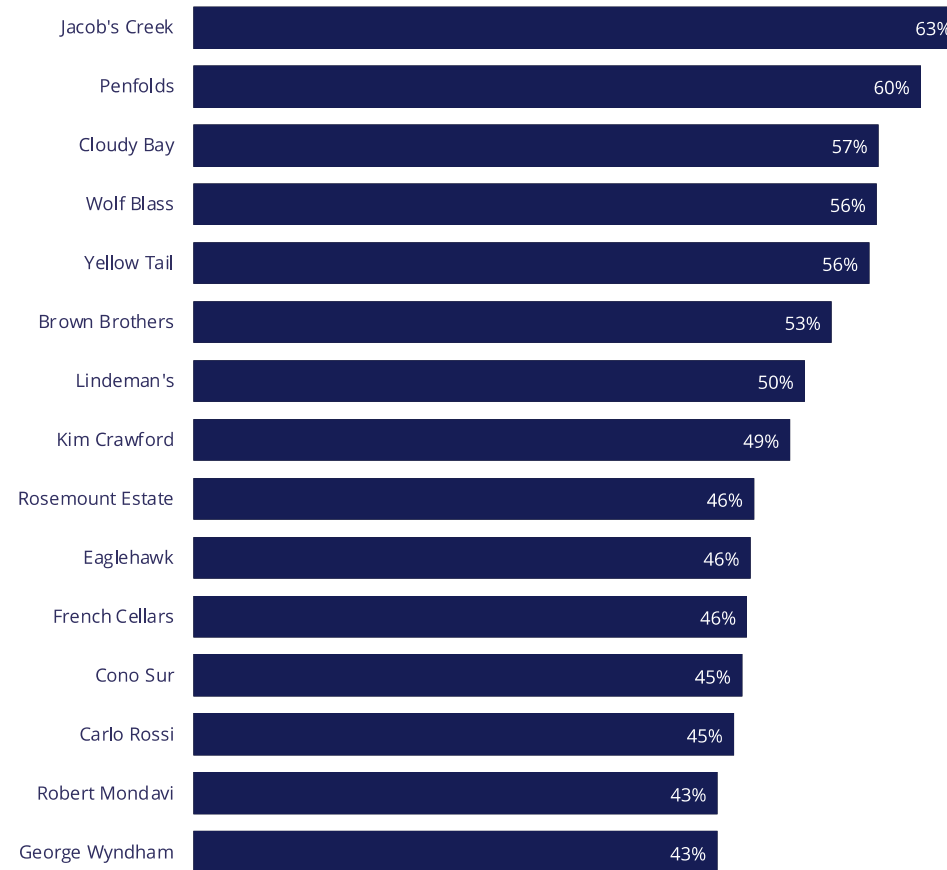
Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Brand consideration

Close consideration rates among the top five brands, suggesting that consumers are open to persuasion rather than necessarily committing to a brand

Consideration: Top 15

% who would consider buying the following brands
Base = Those who have heard of each brand



Source: Wine Intelligence, Vinitrac® Singapore, Apr'22 (n=600) Singaporean semi-annual wine drinkers

Brand consideration: Tracking

Consideration rates have remained broadly stable, with market leader Jacob's Creek seeing an increase over the short-term

Consideration: Tracking

% who would consider buying the following brands
Base = Those who have heard of each brand

Ranking '22		2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
					vs. '20	vs. '21
1	Jacob's Creek	57%	53%	63%	→	↑
2	Penfolds	64%	68%	60%	→	→
3	Cloudy Bay	53%	53%	57%	→	→
4=	Wolf Blass	60%	65%	56%	→	↓
4=	Yellow Tail	51%	53%	56%	→	→
6	Brown Brothers	54%	52%	53%	→	→
7	Lindeman's	48%	47%	50%	→	→
8	Kim Crawford	42%	30%	49%	→	↑
9=	Rosemount Estate	48%	46%	46%	→	→
9=	Eaglehawk	38%	41%	46%	→	→
9=	French Cellars	50%	54%	46%	→	→
12=	Cono Sur	47%	44%	45%	→	→
12=	Carlo Rossi	44%	45%	45%	→	→
14=	Robert Mondavi	51%	34%	43%	→	→
14=	George Wyndham	47%	35%	43%	→	→

Ranking '22		2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
					vs. '20	vs. '21
14=	Pierre Jean	47%	49%	43%	→	→
17=	Viña Maipo	46%	42%	42%	→	→
17=	Trivento	34%	26%	42%	→	→
19=	Fat Bird	52%	33%	41%	→	→
19=	Hardys	33%	39%	41%	→	→
19=	McGuigan	n/a	n/a	41%	n/a	n/a
22=	Long Flat	31%	37%	40%	→	→
22=	Inniskillin	48%	47%	40%	→	→
22=	Matua	44%	48%	40%	→	→
22=	Ravenswood	35%	39%	40%	→	→
22=	Gato Negro	n/a	n/a	40%	n/a	n/a
22=	Cheval des Andes	39%	40%	40%	→	→
22=	Mouton Cadet	40%	38%	40%	→	→
29=	Woodbridge	32%	37%	39%	→	→
29=	Nederburg	42%	38%	39%	→	→

Results for all 68 brands
available in the data table

Grey shading = low sample size
= Represents equal ranking

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

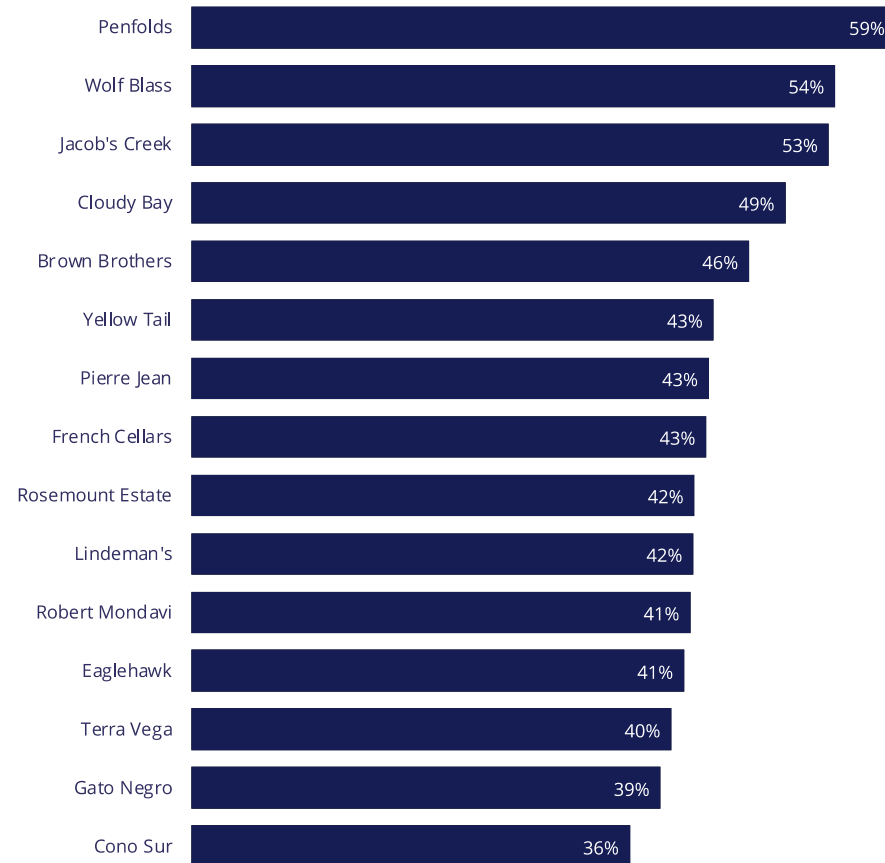
Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Brand affinity

Approximately six in 10 Singaporean semi-annual wine drinkers believe Australian brand Penfolds to be right for people like them

Affinity: Top 15

% who think the following brands are right for people like them
Base = Those who have heard of each brand



Source: Wine Intelligence, Vinitrac® Singapore, Apr'22 (n=600) Singaporean semi-annual wine drinkers

Brand affinity: Tracking

Affinity has remained stable for nearly all brands, with Eaglehawk and Hardy's recording long-term increases

Affinity: Tracking

% who think the following brands are right for people like them
Base = Those who have heard of each brand

Ranking '22		2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
					vs. '20	vs. '21
1	Penfolds	60%	59%	59%	→	→
2	Wolf Blass	56%	56%	54%	→	→
3	Jacob's Creek	57%	50%	53%	→	→
4	Cloudy Bay	51%	50%	49%	→	→
5	Brown Brothers	43%	49%	46%	→	→
6=	Yellow Tail	39%	45%	43%	→	→
6=	Pierre Jean	40%	43%	43%	→	→
6=	French Cellars	45%	48%	43%	→	→
9=	Rosemount Estate	34%	36%	42%	→	→
9=	Lindeman's	35%	41%	42%	→	→
11=	Robert Mondavi	42%	31%	41%	→	→
11=	Eaglehawk	26%	31%	41%	↑	→
13	Terra Vega	32%	23%	40%	→	→
14	Gato Negro	n/a	n/a	39%	n/a	n/a
15=	Cono Sur	43%	29%	36%	→	→

Ranking '22		2020 (n=600)	2021 (n=600)	2022 (n=600)	Tracking	
					vs. '20	vs. '21
15=	Los Vascos	n/a	n/a	36%	n/a	n/a
15=	Cheval des Andes	39%	32%	36%	→	→
15=	Inniskillin	35%	35%	36%	→	→
19=	Carmen	28%	30%	35%	→	→
19=	Mouton Cadet	27%	34%	35%	→	→
19=	Casillero del Diablo	27%	33%	35%	→	→
22=	Carlo Rossi	29%	32%	34%	→	→
22=	Matua	34%	37%	34%	→	→
22=	Les Dauphins	33%	46%	34%	→	→
22=	Fat Bird	37%	36%	34%	→	→
26=	Long Flat	29%	26%	33%	→	→
26=	Hardys	22%	38%	33%	↑	→
26=	Viña Maipo	33%	30%	33%	→	→
29=	Santa Rita	32%	34%	31%	→	→
29=	Gallo Family Vineyards	27%	34%	31%	→	→

Results for all 68 brands
available in the data table

Grey shading = low sample size
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↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

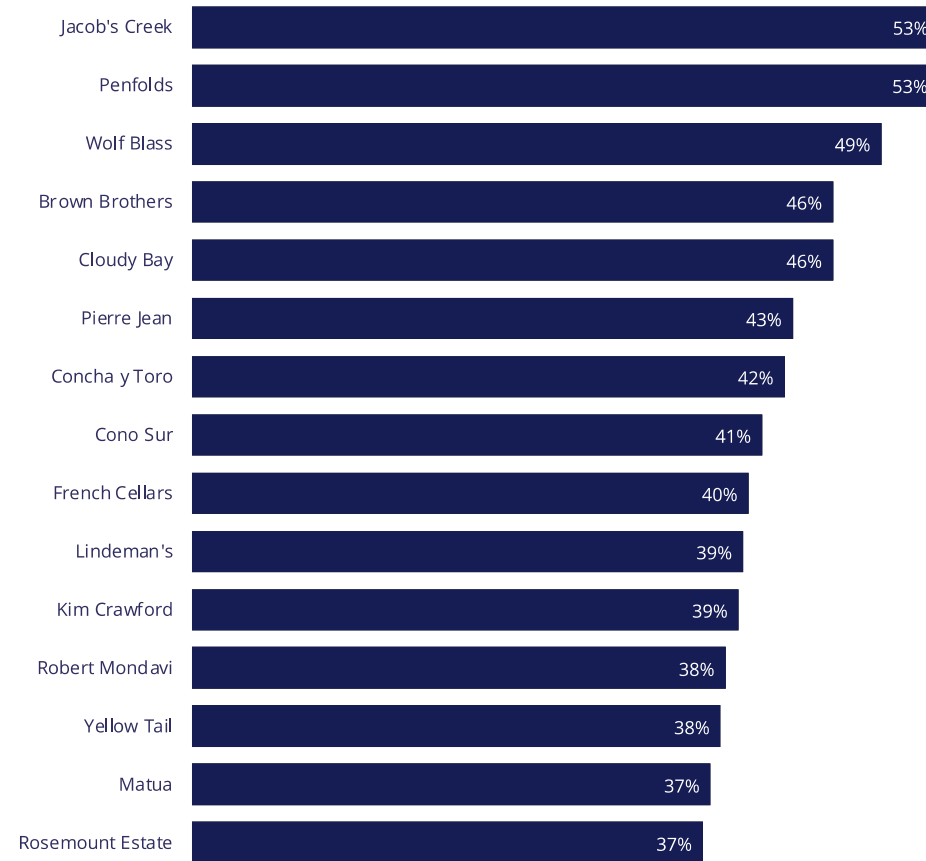
Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Brand recommendation

The most powerful brands top the recommendation rankings

Recommendation: Top 15

% who would recommend the following brands to a friend
Base = Those who have heard of each brand



Source: Wine Intelligence, Vinitrac® Singapore, Apr'22 (n=600) Singaporean semi-annual wine drinkers

Brand recommendation: Tracking

Jacob's Creek and Penfolds top the rankings for recommendation; Concha y Toro's score has risen since 2020

Recommendation: Tracking

% who would recommend the following brands to a friend
Base = Those who have heard of each brand

Ranking '22		2020	2021	2022	Tracking	
		(n=600)	(n=600)	(n=600)	vs. '20	vs. '21
1=	Jacob's Creek	50%	47%	53%	→	→
1=	Penfolds	58%	62%	53%	→	→
3	Wolf Blass	57%	61%	49%	→	↓
4=	Brown Brothers	42%	39%	46%	→	→
4=	Cloudy Bay	47%	50%	46%	→	→
6	Pierre Jean	36%	37%	43%	→	→
7	Concha y Toro	27%	20%	42%	↑	↑
8	Cono Sur	32%	29%	41%	→	→
9	French Cellars	47%	43%	40%	→	→
10=	Lindeman's	37%	36%	39%	→	→
10=	Kim Crawford	37%	31%	39%	→	→
12=	Robert Mondavi	31%	30%	38%	→	→
12=	Yellow Tail	38%	35%	38%	→	→
14=	Matua	35%	37%	37%	→	→
14=	Rosemount Estate	39%	33%	37%	→	→

Ranking '22		2020	2021	2022	Tracking	
		(n=600)	(n=600)	(n=600)	vs. '20	vs. '21
16=	Cheval des Andes	36%	30%	36%	→	→
16=	Los Vascos	n/a	n/a	36%	n/a	n/a
18=	Santa Rita	28%	30%	35%	→	→
18=	Carta Vieja	27%	23%	35%	→	→
20=	Casillero del Diablo	28%	31%	34%	→	→
20=	Carmen	36%	33%	34%	→	→
20=	Gato Negro	n/a	n/a	34%	n/a	n/a
23=	Hardys	29%	33%	32%	→	→
23=	Ravenswood	32%	29%	32%	→	→
23=	Woodbridge	30%	23%	32%	→	→
26=	Kangaroo Ridge	30%	28%	31%	→	→
26=	Trivento	33%	20%	31%	→	→
26=	Nederburg	31%	31%	31%	→	→
26=	Carlo Rossi	30%	31%	31%	→	→
26=	Inniskillin	40%	36%	31%	→	→

Results for all 68 brands available in the data table

Grey shading = low sample size
= Represents equal ranking

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Singapore, Mar '20 (n=600), Mar '21 (n=600), Apr '22 (n=600) Singaporean semi-annual wine drinkers

Research Methodology

Singapore Wine Landscapes

2022

Research methodology

QUANTITATIVE

- The data was collected in Singapore since March 2015
- The following waves March 2017, March 2019 and March 2021 were tracked against April 2022
- Data was gathered via Wine Intelligence’s Vinitrac® online survey
- Respondents were screened to ensure that they were 18-64 years old with a monthly pre-tax income \$3,000. They drank red, white or rosé wine at least twice a year; and bought wine in the off-trade or in the on-trade
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The data is representative of Singapore semi-annual wine drinkers in terms of age, gender and monthly household income before tax
- The distribution of the sample is shown in the table:

		Mar-15	Mar-16	Mar-17	Mar-18	Mar-19	Mar-20	Mar-21	Apr-22
		n=	655	600	603	600	600	600	600
Gender	Male	57%	56%	58%	57%	57%	56%	58%	56%
	Female	43%	44%	42%	43%	43%	44%	42%	44%
	Total	100%	100%	100%	100%	100%	100%	100%	100%
Age	18-24	10%	9%	9%	9%	9%	9%	8%	7%
	25-34	19%	18%	19%	19%	19%	20%	21%	27%
	35-44	29%	32%	32%	30%	30%	28%	26%	21%
	45-54	25%	24%	25%	26%	25%	26%	22%	22%
	55-64 (Pre 2017 55+)	16%	17%	16%	17%	17%	16%	23%	24%
	Total	100%	100%	100%	100%	100%	100%	100%	100%
Monthly household income before tax	SGD 3,000 - 6,999	n/a	n/a	n/a	0%	0%	23%	32%	33%
	SGD 7,000 - 9,999	n/a	n/a	n/a	23%	23%	18%	16%	17%
	SGD 10,000 - 14,999	n/a	n/a	n/a	33%	33%	26%	21%	19%
	SGD 15,000+	n/a	n/a	n/a	44%	43%	33%	31%	30%
	Total	n/a	n/a	n/a	100%	100%	100%	100%	100%

Source: Wine Intelligence, Vinitrac® Singapore, March 2015 - April 2022 (n ≥ 600) Singapore semi-annual wine drinkers

Research methodology

QUALITATIVE

Market interviews were conducted with five experienced industry professionals in the Singapore wine trade in 2022.

Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing.

The five interviewees were wine-industry professionals working within the market in the following roles:

- Head of Wine at a members' club
- Wine Consultant
- Wine Importer
- Wine Marketer
- Market Analyst



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