

Report Brochure



# FUTURE WINE CONSUMERS IN THE US MARKET

NOVEMBER 2015



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# Report price

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84 page  
 PowerPoint  
 report

**Current trends driving the US market**  
 Findings from the Wine Intelligence US Landscapes 2015 report

**Involved Millennials leading the way**

- Around 33% of current US regular wine drinkers are Millennials (21 to 35 years old). As the Millennial generation expands to become the largest population segment in the US, the more wine-tasteful among them will increase their influence in the wine retail market and drive trends. Compared to older generations, they tend to be more involved with the wine category and more adventurous when choosing wine.

**Shifting preferences**

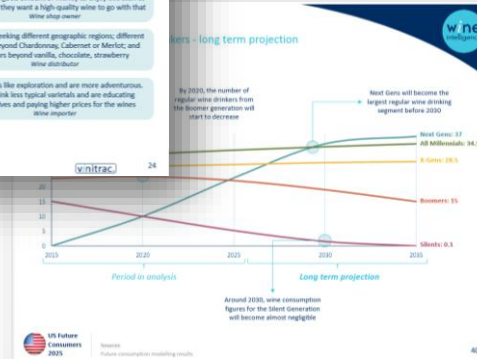
- Traditionally dominant wine styles, varietals and countries of origin are losing favour as previously obscure wines begin to gain traction and popularity. While domestic wine still dominates, consumers have begun to explore new US wine regions, spreading their home grown expertise beyond California. These shifts are driven mostly by Millennials.
- Beverage repertoires are also shifting, as red and white wine, along with beer, have declined since 2010, while cider, Prosecco and Cava have all experienced growth.

**Younger drinkers, the Millennial generation, are getting into wine, and they want to know more about it. They have a great curiosity and they are willing to try wines from all over the world and in all kinds of packaging types. They are not at all set in their ways and they are experimental and curious.**  
*Wine shop owner*

**People are realising that food in restaurants is getting more and more expensive, so people are spending more on food at home and enjoying cooking. They are spending a good amount of money to enjoy this stuff at home, and they want a high-quality wine to go with that.**  
*Wine shop owner*

**They are seeking different geographic regions, different grapes beyond Chardonnay, Cabernet or Merlot, and flavours beyond vanilla, chocolate, strawberry.**  
*Wine distributor*

**Millennials like exploration and are more adventurous. They drink less typical varietals and are educating themselves and paying higher prices for the wines.**  
*Wine importer*



**Expensive** **Special occasions**  
**Sophisticated**  
**Relaxing** **To drink in restaurants**  
**A good gift** **Romantic**  
**To drink with family**

Wine has positive associations with sophistication and romance...

Over half of Next Gens are open to learning about wine.

**Attitude towards wine**

Base: US on-premise drinking age, aged between 18 and 20 (n=200)

I think wine is interesting and I would like to learn more about it: 37%

I find wine neither an interesting nor uninteresting topic: 24%

I am totally uninterested in wine as a topic: 17%



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‘When asked to think about the future, market researchers tend to become very uncomfortable. In typical futurology, the hard data, the provable facts are conspicuously absent. So the question is asked: why do this kind of exercise at all?’

‘In fact, the future of the US wine market really is worth exploring in some depth. It is the largest and most valuable market for wine on Earth, and the changing population and cultural norms suggest it will consolidate its #1 ranking further over the next 10 years.’

‘Whether one likes it or not, the fortunes of the world wine industry are indelibly linked to the behaviour of the American wine drinker over the next decade.’

‘It therefore seems appropriate to explore who that drinker of 2025 might be, and what they might want from the wine category.’



**Luis Osório**  
*Senior Research Analyst  
Wine Intelligence*



## How does Vinitrac® work?

### 1) Defining the right samples:

- Wine Intelligence, with the support of global research companies (e.g. TNS, YouGov), regularly runs calibration studies in each market in order to define demographic specifications of the wine consumers and the size of the market (i.e. penetration of wine consumption)

### 2) Running the online survey:

- Invitations to participate in an online survey programmed by Wine Intelligence are then distributed to residents in each market
- Respondents are directed to a URL address, which provides access to the online survey
- Based on given criteria (e.g. age, beverage, frequency of wine consumption) respondents will either proceed or screen out of the survey
- Wine Intelligence monitors completed responses to build samples representative of the target markets' wine drinking population based on the most recent calibration study

### 3) Cleaning the data:

- When a representative sample is logged, the survey is closed
- Wine Intelligence will then clean out all invalid data points (e.g. those who sped through the survey or gave inconsistent answers to selected questions) and weight the data in order to ensure representability



- The data for this survey was collected in the US in March 2015, August 2015 and October 2015
- Data was gathered via Wine Intelligence's Vinitrac<sup>®</sup> online survey:
  - 4,187 US regular wine drinkers (March + August 2015)
  - 2,001 US regular wine drinkers (October 2015)
  - 200 US young adults (October 2015)
- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-premise or in the on-premise
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The data is representative of US regular wine drinkers in terms of age, gender and region

## Secondary sources / Desk research:

We conducted a complex desk research process across studies and articles from different publicly available sources, including:

- Cassandra Report
- United Nations
- [digitalmarketingstrategiessummit.com](http://digitalmarketingstrategiessummit.com)

## Future consumption modelling:

We developed an econometric model based on a number of primary and secondary data inputs, including:

- Historical number of regular wine drinkers
- Historical number of regular wine drinkers per generation
- On-premise and off-premise spend means

## Trade Interviews programme (n=12):

Wine Intelligence developed a unique contact list over the last 15 years, putting together relevant names of the industry around the world. 12 industry specialists were interviewed from different sectors such as:

- Import
- Distribution
- Retail
- Restaurant chains



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