

Report Brochure



ROSÉ DRINKERS IN THE US MARKET

APRIL 2016

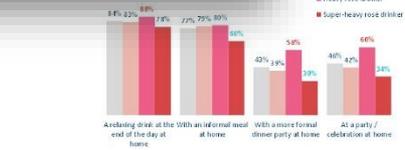
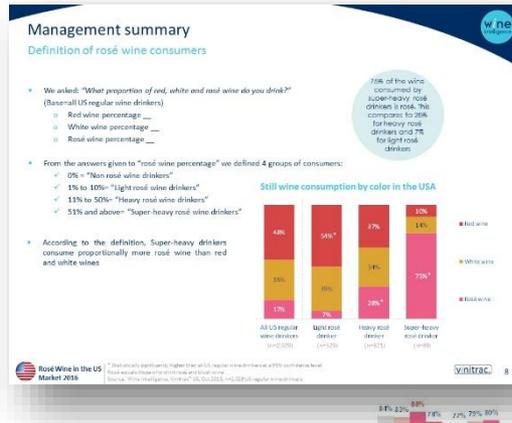
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With consumers' diversifying demand for rosé wine, engaging with America's 66 million rosé drinkers (both dry and sweet) needs to move beyond a "one-size-fits-all" approach. In this report, we identify three types of rosé wine consumers based on the share of their total still wine consumption accounted for by rosé: light rosé drinkers (1-10%), heavy rosé drinkers (11-50%) and super-heavy rosé drinkers (51% or more). These groups vary considerably in all kinds of ways, and have very different relationships with the wine category in general.

For light drinkers, rosé wine is not an important part of their alcohol consumption. More likely to belong to the Boomers generation (aged 50-64), they have a medium level of wine involvement.

In contrast, rosé wine is indispensable to the female-dominated super-heavy drinkers group, who drink far less red and white wine than average consumers. Of the three groups, they are the least engaged with wine generally.

It's a very different story when it comes to the heavy drinkers. This is the category particularly prevalent among younger, Millennial drinkers.

This population in the US market has been on the rise over the past few years, and this growth is very likely to continue. Indeed, this group of consumers seems set to become the principal trendsetters in the rosé category.

Chuan Zhou
Senior Research Manager
Wine Intelligence



Research methodology:

Sampling and quotas used for Vinitrac® US



- The data for this survey was collected in US in September 2007, September 2010, October 2013 and October 2015
- Data was gathered via Wine Intelligence's Vinitrac® online survey with:
 - 2,000 US regular wine drinkers (September 2007)
 - 2,007 US regular wine drinkers (September 2010)
 - 2,018 US regular wine drinkers (October 2013)
 - 2,029 US regular wine drinkers (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

****Methodology note:** Wine Intelligence has reviewed the calibration for US sparkling wine drinkers in 2015 and re-weighted the 2014 results according to this in order to be more precise in terms of sample population. In doing so, the tracking in this report has improved in reliability and accuracy.*



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



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