

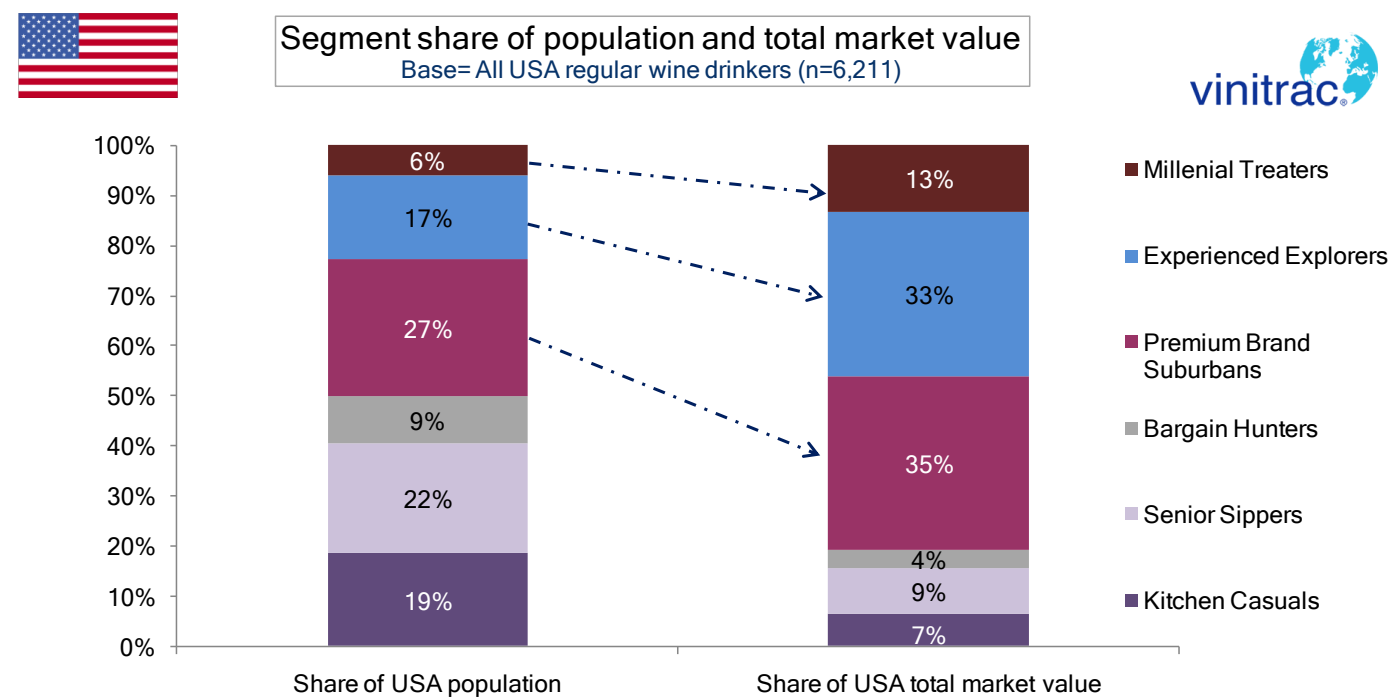
The North America Opportunity

What is the state of play for wine in the USA and Canada?

Overview of market opportunity

- The US wine market has potential for significant growth, with current consumption per capita of 13 litres among adults (and 37L among regular wine drinkers)
- 34 % of US adults are regular wine drinkers - that's 74 million people drinking wine at least once a week (source – WI calibration survey (IPSOS), March 2009, n=969 USA Adults)
- A traditional beer drinking market, Canadians are increasingly consuming more wine with current consumption per capita of 15 litres among adults (24L per head among regular wine drinkers)
- 60 % of Canadian adults are regular wine drinkers - that's 16 million people of which 9.3 million drink weekly or more (Source: WI Calibration Study, Sept 2009)

USA: Which are the most valuable segments of wine drinkers?



Source: Wine Intelligence Vinitrac® USA, 2xAugust'09 & Nov'09; n=6,211 USA regular wine drinkers

Millennial Treaters Younger, high spending wine loving consumers, with 'conservative' views of wine and growing knowledge

I don't need an occasion to drink wine
Millennial Treater, male

I have a contest with my brother to see who can get it for less
Premium Brand Suburban, male

Premium Brand Suburbans Frequent, brand savvy drinkers, influenced by price and promotions

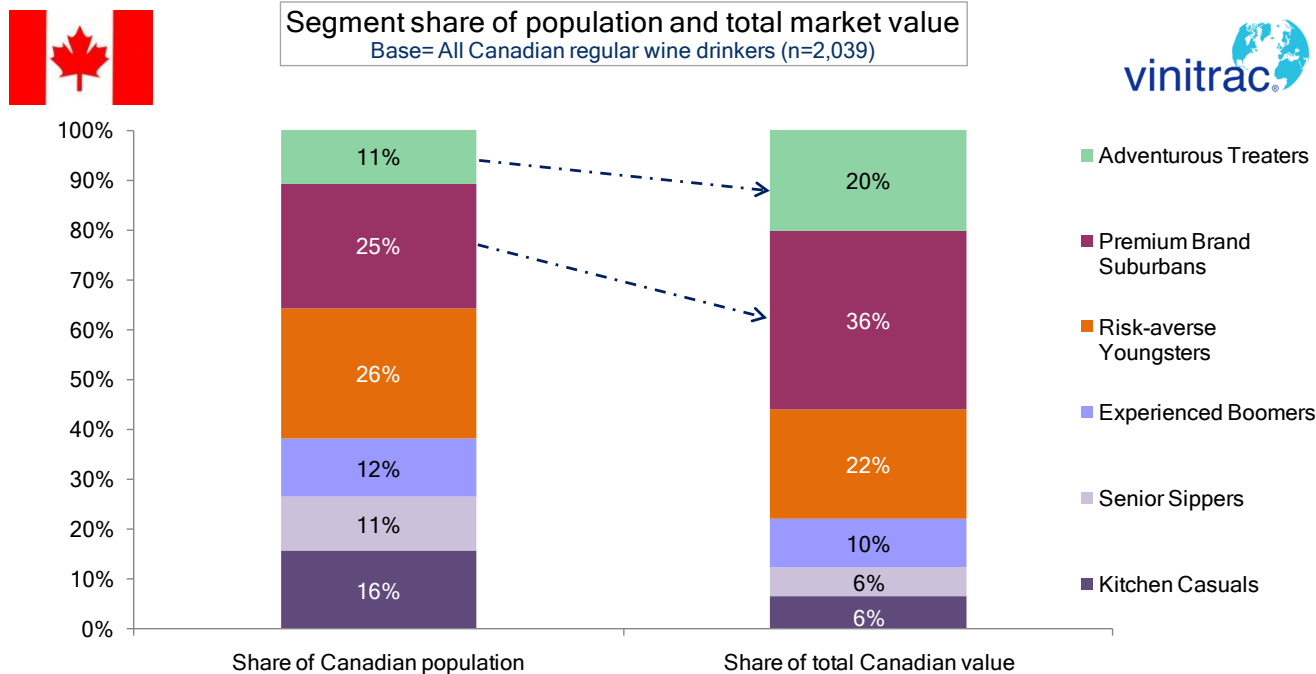
Experienced Explorers Highly involved, frequent drinkers who are growing confident in their wine knowledge and choices

Wine elevates the food, the experience, the conversation in a way that nothing else does
Experienced Explorer, male

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Canada: Which are the most valuable segments of wine drinkers?



Source: Wine Intelligence Vinitrac® Canada, June '09 & Nov '09; n=2,039 Canadian regular wine drinkers

Adventurous Treaters Younger, highly knowledgeable and involved wine consumers, who are high spenders both in the on and off-premise

Wine plays a huge role in my life...I love travelling to places that have wine
Adventurous Treater, female

There is one particular bottle of wine that I fall back to...it always tastes great
Risk-averse Youngster, female

Risk-averse Youngsters Younger, female biased drinkers who are just entering the category, and are looking for familiarity to provide reassurance

Premium Brand Suburbans Older, frequent drinkers who are involved in the category, seeking quality and value

I usually spend under \$15 for an everyday wine
Premium Brand Suburban, female

Canada Focus: key differences between Quebec and rest of Canada

English-speaking Canada	Quebec
More frequent drinkers of wine at non-food occasions	Greater proportion of wine drinkers consuming both red & rosé wine (½ drink rosé)
Don't consider wine to be as expensive as those in Quebec	More involved with wine (36% high involved compared with 28% in other Provinces)
More likely to seek promotion and discount and more brand aware and brand loyal	More experimental with wine and are more likely to seek recommendations from others

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