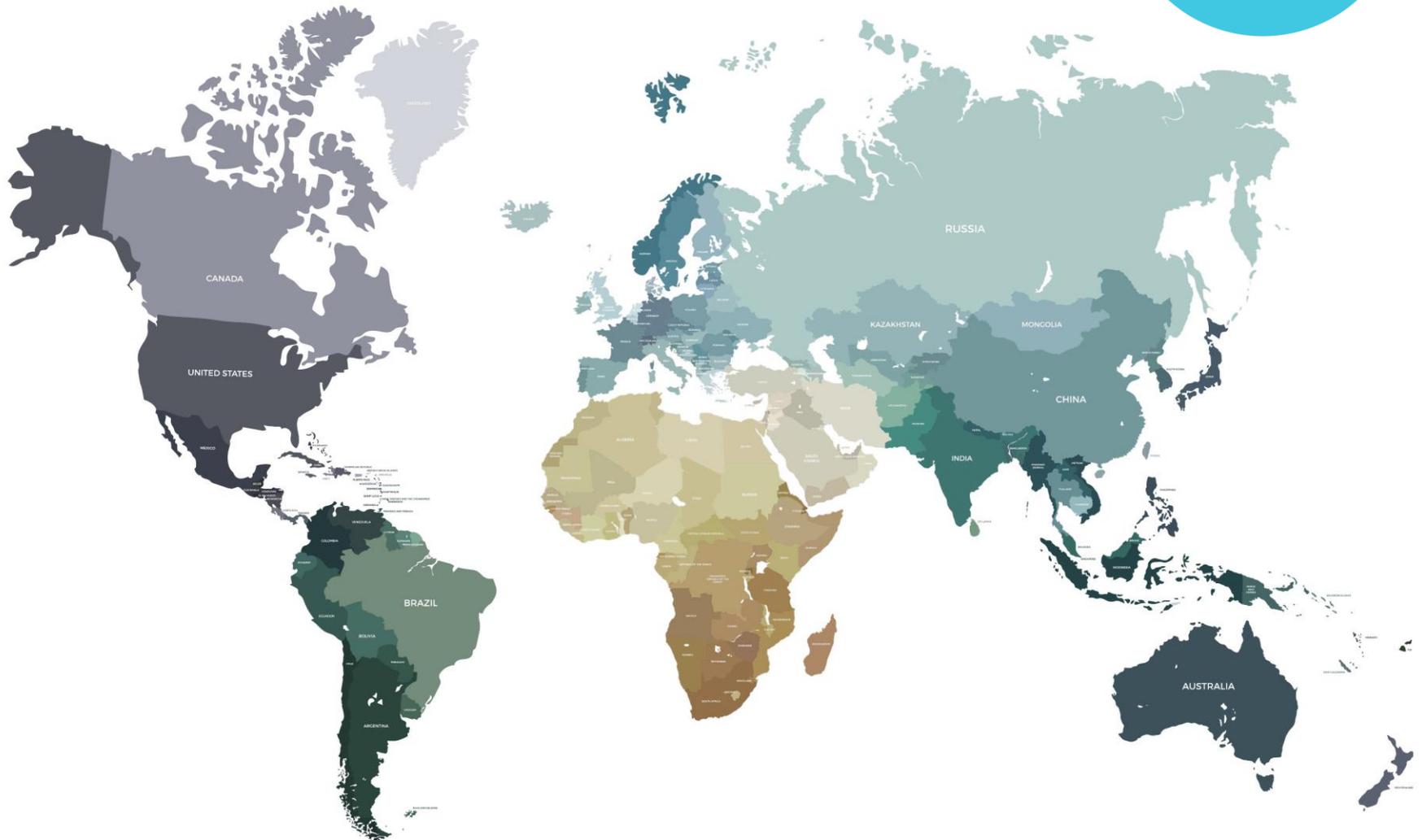

GLOBAL TRENDS IN WINE 2019

February 2019 Report



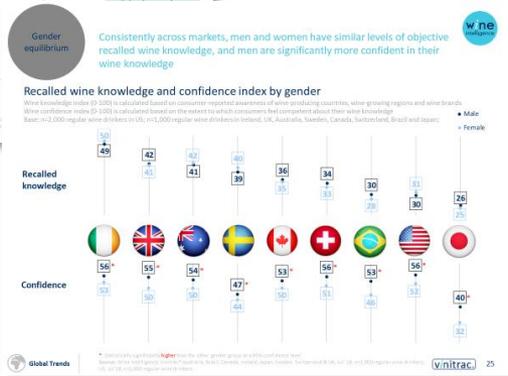
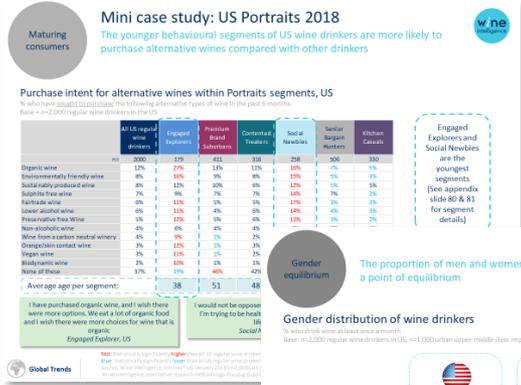
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Introduction

Consumer trends in wine: The who, the what, and the how



Identifying trends in consumer behaviour has been something of a growth industry for several decades. Exciting and game-changing things are happening more quickly than ever before in many consumer goods categories, as communication technology blurs cultural and community boundaries. New and (mostly) useful goods and services are adopted at a speed that would surprise even the business leaders of 20 years ago.

Alcoholic drinks are at the forefront of several trends, which offer both immense opportunities and daunting challenges to today's leadership cohort. Consumer behaviours in this space are arguably on a more rapid evolutionary trajectory because alcohol is subject to regulatory changes, as well as changes in technology, retailing and consumer culture. Within alcohol, wine must compete – and to an extent emulate – developments in adjacent categories such as craft beer, spirits and hard cider.

When reading a report like this, many readers will find some of the observations relatable (“it is happening to me / people I know”) or logical (“that makes sense given x and y”). Some, naturally, will also wonder: “what does this trend have to do with me or my business?” Or, more fundamentally: “how does it help me to know this”?

This last question is a great one to bear in mind as you proceed through the six themes and 12 wine consumer trends for 2019 that we have identified from our tracking data collected via Vinitrac[®], our wine consumer survey platform which gathers usage and attitude information from wine drinkers in 33 major consumption markets every year. To answer the question correctly, we must first address an even more fundamental question: what is strategy?



Introduction

Consumer trends in wine: The who, the what, and the how



The great business academic, Costas Markides, caused a stir some years ago by arguing that few people could really define what strategy was. In response to this, he offered a three-part definition. Strategy, he said, is the answer to three simple challenges:

1. Who your company is targeting with your products or services, and who you are not targeting
2. What products or services you are offering, and what you are not
3. How you are going to deliver these products or services

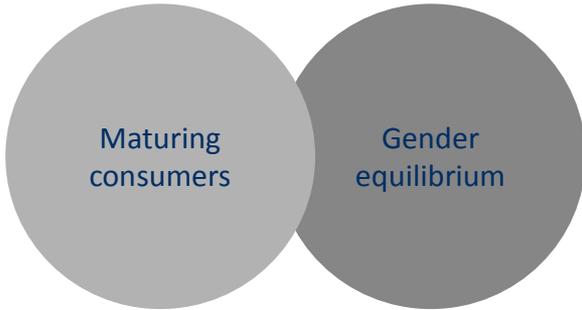
He went on to argue that strategies have many inputs (ie should be evidence-led as well as vision-led) and should be flexible (ie responsive to changing market needs and competitor behaviour). In that spirit, then, consider Consumer Trends in Wine 2019 as an input to your ongoing strategic position. If you know the answer to the three questions above, what will the knowledge contained in this report make you change about your strategy? In other words, is your who / what / how equation going to change because your audience is older, cutting down on alcohol, or changing the way they buy?



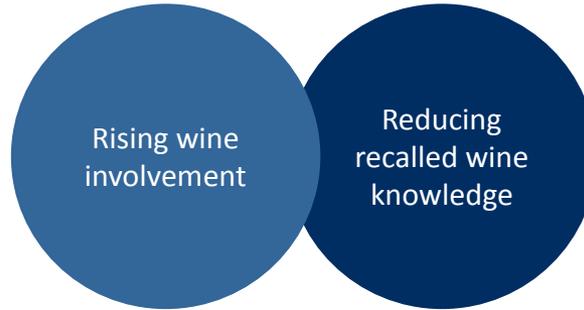
Lulie Halstead
Chief Executive
Wine Intelligence

Global trends in wine 2019

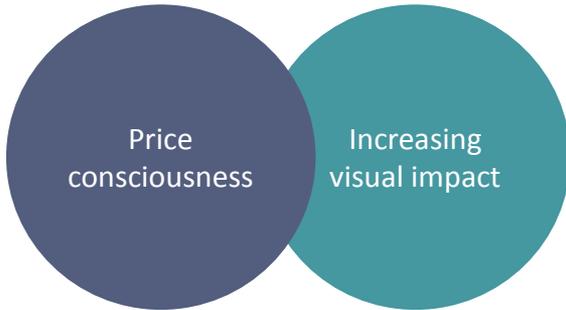
Demographics



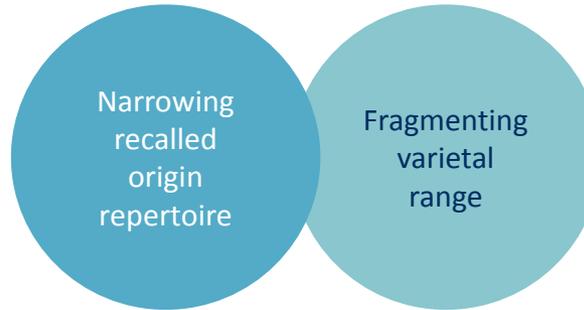
Consumer attitudes



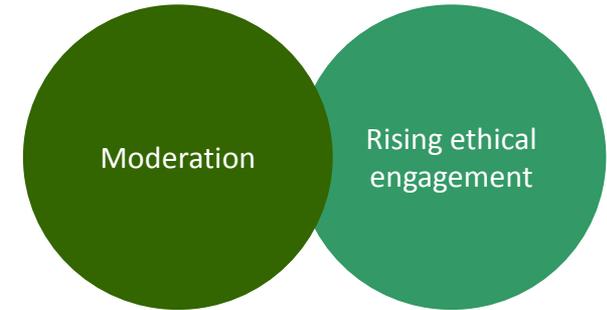
Channel behaviours



Purchase drivers



Wine repertoire



Responsibility

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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