



WINE INTELLIGENCE

US STATE-LEVEL LANDSCAPES: CALIFORNIA

JANUARY 2020



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WINE CONFIDENCE AND KNOWLEDGE INDEX

EXAMPLE



Wine **knowledge** index

Wine knowledge index (0-100) is calculated based on consumer-reported awareness of wine-producing countries, wine-growing regions and wine brands
Base = All regular wine drinkers in the US (n=11,330)



All regular wine drinkers in the US



All RWDs resident in CA

Index difference



Wine **confidence** index

Wine confidence index (0-100) is calculated based on the extent to which consumers feel competent about their wine knowledge
Base = All regular wine drinkers in the US (n=11,330)



All regular wine drinkers in the US



All RWDs resident in CA

Index difference



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

Red / Blue: statistically significantly higher / lower than all US regular wine drinkers at a 95% confidence level
Wine Intelligence Vinitrac® US, 2019, n=11,330 US regular wine drinkers

RESEARCH METHODOLOGY

Vinitrac® US



- The data for this report was collected in the US in 2015, 2017, 2018 and 2019
- Data was gathered via Wine Intelligence’s Vinitrac® online survey:
 - 4,029 regular wine drinkers (2015)
 - 12,051 regular wine drinkers (2017)
 - 12,000 regular wine drinkers (2018)
 - 11,330 regular wine drinkers (2019)
- 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 and gender
- The distribution of the sample is shown in the table

		<i>n</i> =	2015	2017	2018	2019
Gender	Male		49%	48%	50%	50%
	Female		51%	52%	50%	50%
	Total		100%	100%	100%	100%
Age	21 - 24		8%	8%	8%	8%
	25 - 34		22%	21%	22%	22%
	35 - 44		16%	13%	14%	14%
	45 - 54		18%	18%	18%	18%
	55-64		16%	17%	18%	18%
	65 and over		19%	22%	21%	21%
	Total		100%	100%	100%	100%

Source: Wine Intelligence, Vinitrac® US, 2015 (n=4,029), 2017 (n=12,051), 2018 (n=12,000) and 2019 (n=11,330) US regular wine drinkers

Qualitative

Trade interview methodology

- Trade interviews were conducted with 6 experienced industry professionals in US wine trade in December 2019
- Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing
- The 6 interviewees were members of the wine trade working in different roles within the industry:
 - *x 2 Wine and Spirits Importer and Distributor*
 - *x 1 Wine Producer*
 - *x 1 Wine Educator*
 - *x 1 Marketing Manager and Director*
 - *x 1 Wine Educator and Influencer / Distributor*

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