WINE INTELLIGENCE

US WINE LANDSCAPES

JANUARY 2021

REPORT BROCHURE

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CONTENTS

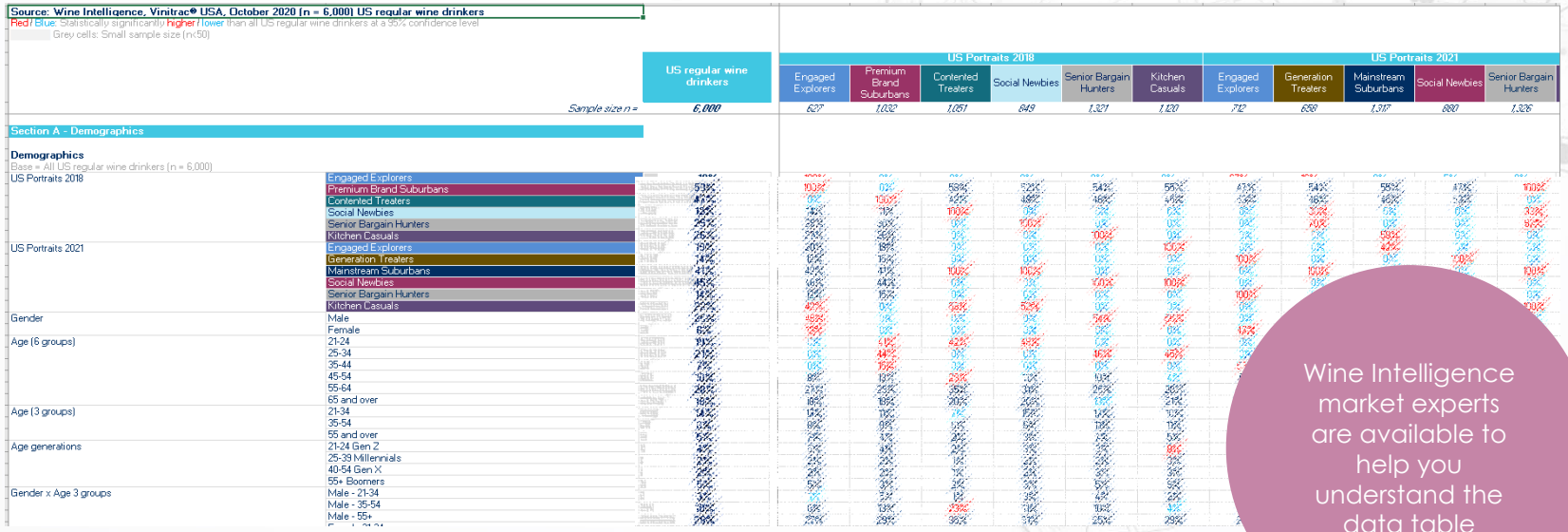
DATA TABLE DETAILS

Data table includes:

- **Profiling by cross-tabs** including US Portraits (consumer segmentation), gender, age, income, location, online wine buyers and wine involvement
- **Tracking** against past waves where available
  - This data table includes July 2015, 2016, 2017, 2018, October 2018, July + October 2019, October 2020
- **All significances highlighted**

Example screenshot of data table:

Data will not be blurred when you receive the report



Source: Wine Intelligence, Vinitrac® USA, October 2020 (n = 6,000) US regular wine drinkers

Red/Blue: Statistically significantly higher/lower than all US regular wine drinkers at a 95% confidence level

Grey cells: Small sample size (n<50)

		US regular wine drinkers	US Portraits 2018						US Portraits 2021				
			Engaged Explorers	Premium Brand Suburbans	Contented Treaters	Social Newbies	Senior Bargain Hunters	Kitchen Casuals	Engaged Explorers	Generation Treaters	Mainstream Suburbans	Social Newbies	Senior Bargain Hunters
	Sample size n =	6,000	627	1,032	1,051	849	1,321	1,120	712	658	1,317	880	1,326
Section A - Demographics													
Demographics													
Base = All US regular wine drinkers (n = 6,000)													
US Portraits 2018	Engaged Explorers	10%	100%	0%	59%	52%	54%	55%	47%	54%	55%	47%	100%
	Premium Brand Suburbans	53%	0%	100%	42%	48%	46%	44%	52%	46%	46%	53%	0%
	Contented Treaters	47%	0%	0%	100%	0%	0%	0%	0%	0%	0%	0%	100%
	Social Newbies	13%	14%	11%	0%	100%	0%	0%	0%	22%	5%	6%	33%
	Senior Bargain Hunters	25%	28%	30%	0%	0%	100%	0%	0%	0%	0%	0%	67%
	Kitchen Casuals	26%	27%	26%	0%	0%	0%	100%	0%	0%	59%	0%	0%
US Portraits 2021	Engaged Explorers	19%	20%	18%	13%	12%	13%	13%	0%	12%	42%	2%	0%
	Generation Treaters	14%	12%	13%	9%	9%	10%	10%	100%	0%	0%	10%	0%
	Mainstream Suburbans	41%	45%	41%	100%	100%	0%	0%	0%	100%	0%	0%	100%
	Social Newbies	15%	16%	14%	0%	0%	100%	100%	0%	0%	100%	0%	0%
	Senior Bargain Hunters	33%	40%	33%	0%	0%	0%	0%	100%	0%	0%	0%	100%
Gender	Male	49%	49%	51%	48%	50%	54%	55%	52%	47%	51%	52%	47%
	Female	51%	51%	49%	52%	50%	46%	45%	48%	53%	49%	48%	53%
Age (6 groups)	21-24	11%	11%	12%	12%	11%	12%	12%	12%	12%	12%	12%	12%
	25-34	21%	21%	44%	21%	21%	16%	15%	22%	21%	21%	21%	21%
	35-44	17%	18%	18%	17%	17%	17%	17%	17%	17%	17%	17%	17%
	45-54	18%	18%	17%	23%	19%	18%	17%	18%	18%	18%	18%	18%
	55-64	18%	18%	15%	15%	19%	19%	20%	18%	18%	18%	18%	18%
	65 and over	16%	16%	16%	20%	20%	18%	21%	18%	16%	16%	16%	16%
Age (3 groups)	21-34	14%	14%	14%	14%	14%	14%	14%	14%	14%	14%	14%	14%
	35-54	19%	19%	19%	19%	19%	19%	19%	19%	19%	19%	19%	19%
	55 and over	34%	34%	31%	34%	34%	34%	34%	34%	34%	34%	34%	34%
Age generations	21-24 Gen Z	14%	14%	14%	14%	14%	14%	14%	14%	14%	14%	14%	14%
	25-39 Millennials	29%	29%	29%	29%	29%	29%	29%	29%	29%	29%	29%	29%
	40-54 Gen X	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
	55+ Boomers	36%	36%	36%	36%	36%	36%	36%	36%	36%	36%	36%	36%
Gender x Age 3 groups	Male - 21-34	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%	15%
	Male - 35-54	18%	18%	18%	18%	18%	18%	18%	18%	18%	18%	18%	18%
	Male - 55+	16%	16%	16%	16%	16%	16%	16%	16%	16%	16%	16%	16%

Wine Intelligence market experts are available to help you understand the data table

INTRODUCTION

Like it or not, the large and influential Millennial cohort is now in the driving seat in the US market. This change has been long-heralded, and perhaps glacial in its development. However, in this year's Wine Intelligence consumer tracking data one can see its effects.

Some of this direction of travel is down to Covid-19, but by no means all. Introducing the previous edition of this report 12 months ago, in the BC (Before Covid) era, we remarked that "if Millennials account for the future wine drinking population, the US wine market will definitely experience some evolutionary pain. The newer wine drinkers are highly involved, open-minded, seeking quality and willing to pay for it, while drinking less overall". Despite Covid, or perhaps because of it, this evolutionary pain is starting to be felt as Boomers start to draw back from the category and Millennials seek out interesting products, right here and right now via their Drizly or Instacart apps.

The broader picture remains one of positivity coming out of the wine category, despite a tumultuous year. Initial estimates show that wine volumes have reversed their decline of 2019. This is all the more remarkable given the cratering of the on-premise during the year.

There are several good reasons for this, but most of them are temporary, and we expect wine volumes to resume a slow decline once normalcy is restored. The effect of the pandemic has produced different occasions and different needs. If you're working from home, and need cheering up, why not break open a bottle at 5pm? If you're able to navigate the increasing variety of e-commerce channel options, you can have wine on your doorstep quite quickly.

Once we see a world restored, we may celebrate to excess, but this may herald a new, more thoughtful and austere era, where brands and producers must demonstrate more than just pleasant taste and a memorable label. With the on-premise struggling to reconstitute itself, there may not be obvious opportunities for the esoteric in the short run. However, the winners of the 2020s will be the ones to cater to the dominance of the Millennial consumer. At its best, wine can offer intellectual depth, a sense of place, education and fun. These needs align very closely with a Millennial generation scarred both by the financial crisis of 12 years ago and the chaos of the pandemic. It will translate into a wine market that offers more interest, and probably higher prices, but ultimately less liquid.

EXAMPLE SLIDE:

MANAGEMENT SUMMARY

REGULAR WINE DRINKERS GETTING YOUNGER AND MORE AFFLUENT

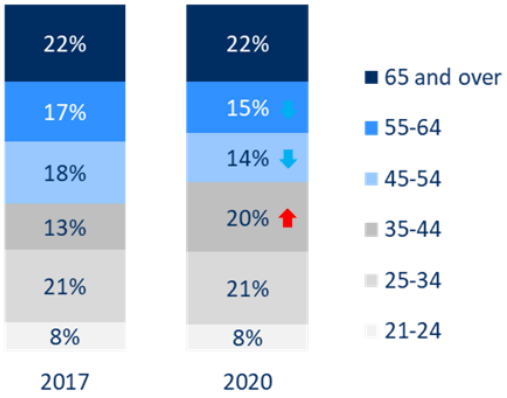
Regular wine drinkers are getting younger and more affluent

In 2017, US regular wine drinkers were majority females, whereas this has now reversed, with more males regularly drinking wine – this could either be due to more males entering the market or more females exiting the market

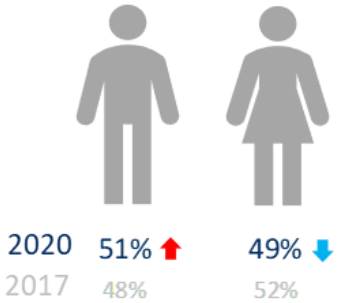
The proportion of higher income drinkers has significantly increased since 2017, while the proportion of regular wine drinkers who have a household income between $40,000-$79,999 has decreased. This showcases a shift in those who drink wine regularly and what exposable income they might have

The US wine drinker demographic is also becoming more dominated by Millennials, as the proportion of older drinkers declines

Age



Gender



Total household income (before tax)

	2017	2020
Under $20,000	8%	7%
$20,000 - $39,999	17%	15%
$40,000 - $59,999	17%	15%
$60,000 - $79,999	18%	16%
$80,000 - $149,999	26%	28%
$150,000+	10%	13%
Prefer not to answer	3%	5%

WHAT DO MARKET EXPERTS SAY?

"Businesses that may have leaned a little heavily on the older demographics and not changed messaging to be meaningful to younger consumers have not benefited as strongly in 2020"

Wine Producer, US

Wine Intelligence trade interview programme 2020-21
↑ / ↓ : Statistically significantly higher / lower than the 2017 wave at a 95% confidence level
Wine Intelligence, Vinitrac® US, July 2017 and October 2020 (n≥4,000) US regular wine drinkers

EXAMPLE SLIDE: ATTITUDES TOWARDS WINE

While over half of US regular wine drinkers enjoy trying new and different styles of wine on a regular basis, there is an increased proportion of those who tend to stick to what they know, driven particularly by older consumers

Attitude towards wine: Tracking

Base = All US regular wine drinkers (n≥4,000)

	2017	2019	2020	Tracking	
n=	*4,000*	*7,002*	*6,000*	vs. '17	vs. '19
I enjoy trying new and different styles of wine on a regular basis	56%	52%	52%	↓	→
I don't mind what I buy so long as the price is right	19%	24%	21%	↑	↓
I know what I like and I tend to stick to what I know	25%	24%	27%	↑	↑

Those who enjoy trying new and different styles is largely driven by **high earners** and **young people**

Attitudes towards wine by age

Base = All US regular wine drinkers (n=6,000)

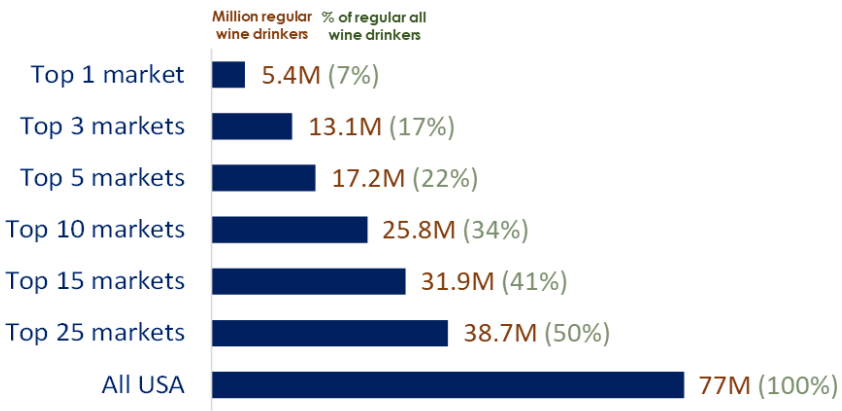
		Age groups		
	All US regular wine drinkers	21-34	35-54	55+
n=	*6,000*	*1,713*	*2,063*	*2,224*
I enjoy trying new and different styles of wine on a regular basis	52%	63%	62%	33%
I don't mind what I buy so long as the price is right	21%	24%	21%	19%
I know what I like and I tend to stick to what I know	27%	13%	18%	47%

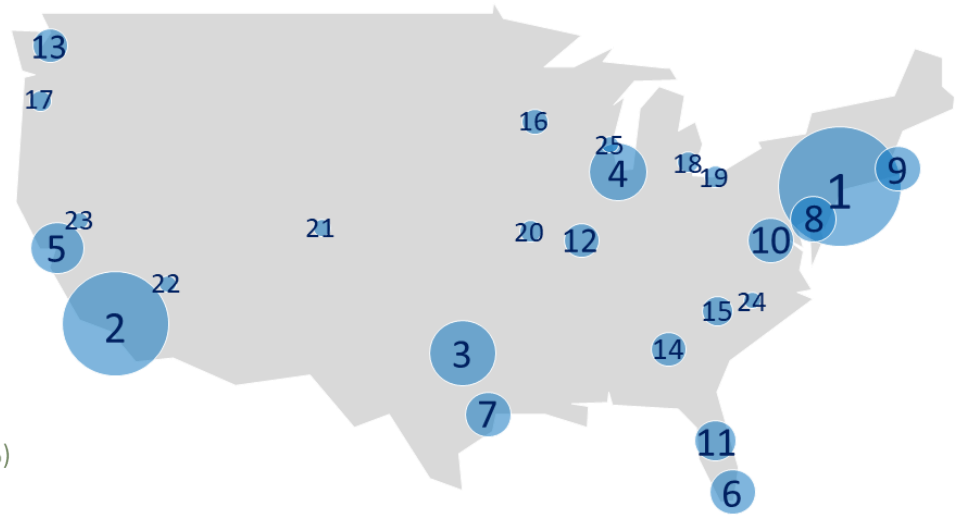
Red / Blue: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® US, July 2017, July + October 2019 and October 2020 (n≥4,000) US regular wine drinkers

EXAMPLE SLIDE: DISTRIBUTION OF US REGULAR WINE DRINKERS

Over 1/5th (22%) of US regular wine drinkers reside in 5 metropolitan areas in the US

Distribution of US regular wine drinkers in the top 25 metropolitan areas





1. New York – Newark
2. Los Angeles – Long Beach
3. Dallas – Fort Worth
4. Chicago – Naperville
5. San Jose – San Francisco – Oakland
6. Miami – Fort Lauderdale – Port St. Lucie
7. Houston – The Woodlands
8. Philadelphia – Reading – Camden
9. Boston – Worcester – Providence
10. Washington – Baltimore – Arlington
11. Orlando – Deltona – Daytona Beach
12. St. Louis – St. Charles – Farmington
13. Seattle – Tacoma
14. Atlanta – Athens – Clarke Cty. – Sandy Springs
15. Charlotte – Concord
16. Minneapolis – St. Paul
17. Portland – Vancouver – Salem
18. Detroit – Warren – Ann Arbor
19. Cleveland – Akron – Canton
20. Kansas City – Overland Park
21. Denver – Aurora
22. Las Vegas – Henderson
23. Sacramento – Roseville
24. Raleigh – Durham – Chapel Hill
25. Milwaukee – Racine – Waukesha

Source: Wine Intelligence, Vinitrac® US, October 2020 (n=2,000) US regular wine drinkers

RESEARCH METHODOLOGY: QUANTITATIVE

- The data for this report was collected in the US in July 2017, July and October 2019 and October 2020
- Data was gathered via Wine Intelligence's Vinitrac® online survey
- 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 gender, age, and region
- The distribution of the sample is shown in the table:

			Jul-17	*Jul-19 + Oct-19*	*Oct-20*
		n=	*4,000*	*7,002*	*6,000*
Gender	Male		48%	51%	51%
	Female		52%	49%	49%
	Total		***100%***	***100%***	***100%***
Age	21 - 24		8%	7%	8%
	25 - 34		21%	21%	21%
	35 - 44		13%	18%	20%
	45 - 54		18%	15%	14%
	55-64		17%	16%	15%
	65 and over		22%	22%	22%
	Total		***100%***	***100%***	***100%***
US Divisions	New England		6%	5%	5%
	Middle Atlantic		16%	15%	15%
	East North Central		13%	11%	11%
	West North Central		6%	6%	7%
	South Atlantic		19%	21%	21%
	East South Central		4%	4%	4%
	West South Central		9%	11%	11%
	Mountain		7%	7%	7%
	Pacific		20%	20%	19%
	Total		***100%***	***100%***	***100%***

Source: Wine Intelligence, Vinitrac® US, July 2017 (n = 4,000), July and October 2019 (n = 7,002) and October 2020 (6,000), US regular wine drinkers

Other sources in the report include Wine Intelligence market experience, secondary sources and trade interviews. Distribution of sample differs for the metropolitan distribution, COVID and SOLA questions

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