



WINE INTELLIGENCE

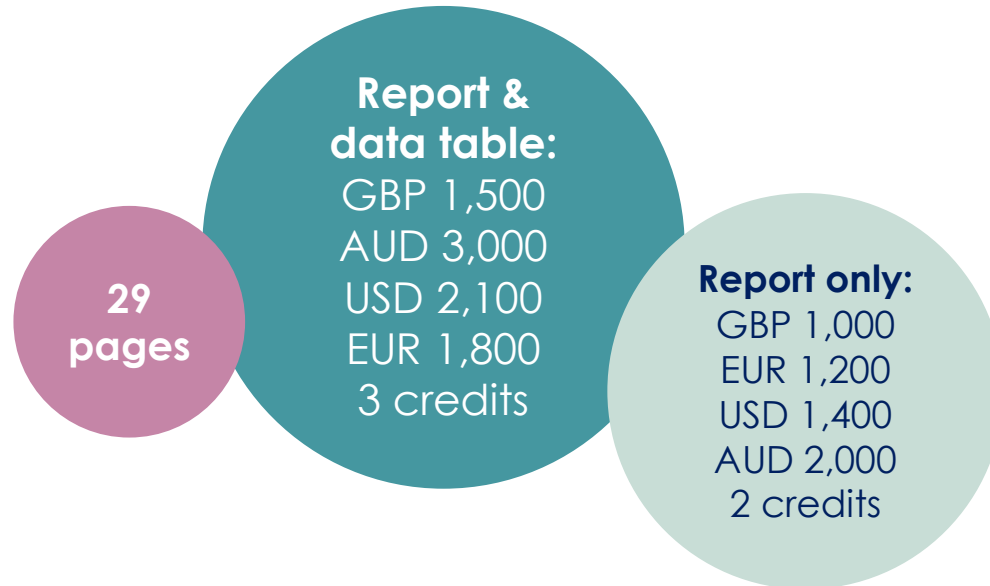
WINE E-COMMERCE IN THE US MARKET

MARCH 2021



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13 E-commerce in the US market

- Demographics
- Channel usage and usage consideration
- Online wine-buying frequency
- Online wine-buying spend
- Triggers to online purchasing
- Online platform usage
- Sources of information
- Trust of sources of information



Definitions of online 'users' and 'considerers'

The following online wine-buying channels were added to usage and consideration questions within each market in order to define online 'users' and 'considerers':

- From an online retailer
- From a delivery app
- From a supermarket / hypermarket website
- From a winery's website
- From a wine club / membership organisation

Notes:

- 'On the internet' was used to define online users and considerers in Ireland
- Online channels shown to respondents varied by market, depending on national legislation and presence / maturity of certain sub-channels

EXAMPLE SLIDE: E-COMMERCE USERS AND CONSIDERERS



E-commerce for wine is mainstream for Chinese wine drinkers, and is taking meaningful share of market in other territories; note also the potential in North America, where considerers outnumber users by two to one

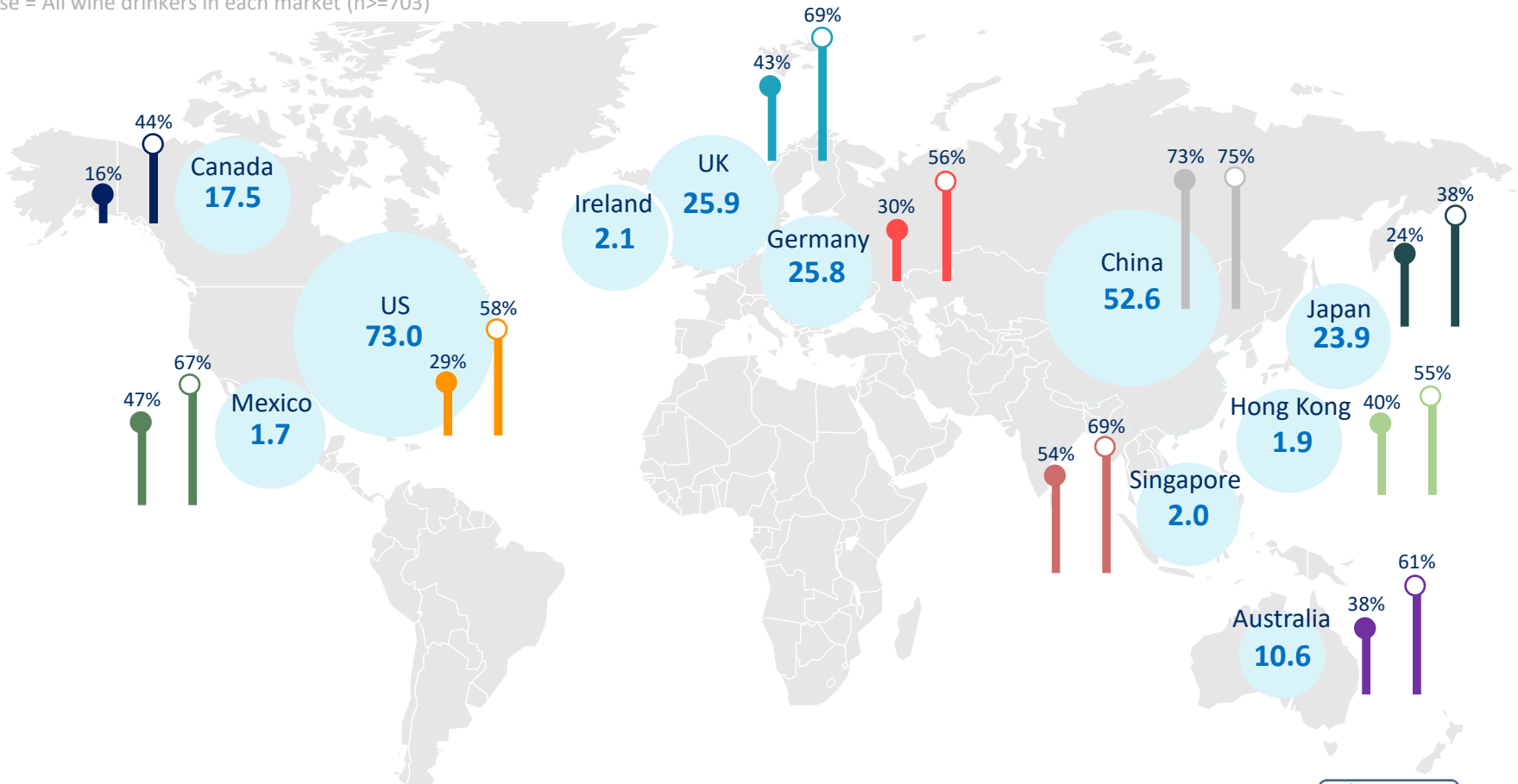
Online users and considerers by market

Users: % who have bought wine from an online channel in the past 6 months
 Considerers: % who would consider buying wine from an online channel in the future
 Base = All wine drinkers in each market (n>=703)

Size of bubble represents size the wine market in terms of wine drinkers

#: Population of wine drinkers in each market

● Channel usage
 ○ Channel consideration



Note: Ireland usage and consideration data omitted due to methodology changes
 Source: Wine Intelligence Vinitrac® Global, October 2020, n>=703 wine drinkers in each market

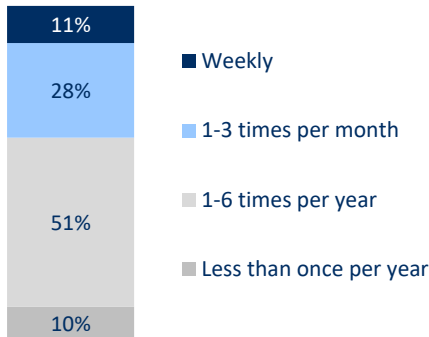
EXAMPLE SLIDE: US: ONLINE BUYING BEHAVIOUR



Male wine drinkers, Millennials and Gen X are buying wine online more often than other groups, in line with younger, experiential segments Engaged Explorers and Generation Treaters

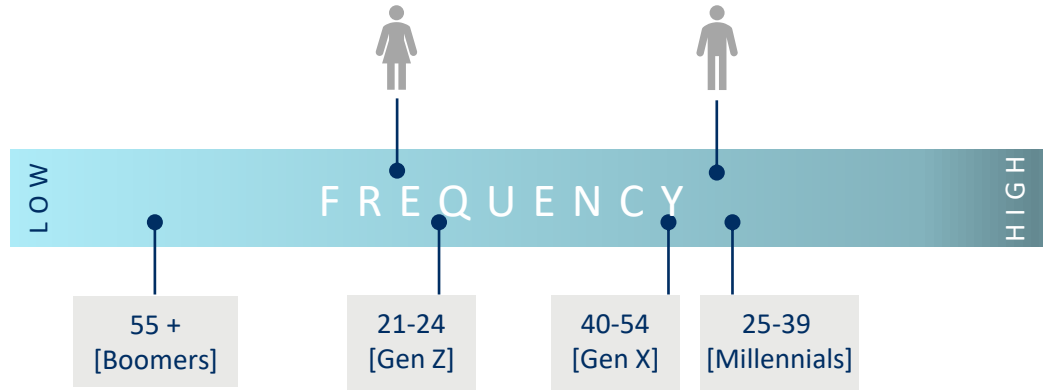
Frequency of online buying

% who buy wine online at the following frequencies
Base = All US regular wine drinkers (n=2,000)



On average
14.8 times per year

Frequency of online buying: by gender and age



Frequency of online buying: by Portraits



METHODOLOGY

Vinitrac® US



- The data for this report was collected in the US in October 2020
- Data was gathered via Wine Intelligence’s Vinitrac® online survey
- Respondents were screened to ensure that they were at least 21 years old; drank red, white, rosé or blush wine at least once a month; and bought 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 US Divisions
- The distribution of the sample is shown in the table:

		<i>Oct-20</i>
		<i>n= 2,000</i>
Gender	Male	51%
	Female	49%
	Total	100%
Age	21-24	7%
	25-34	21%
	35-44	20%
	45-54	14%
	55-64	15%
	65 and over	22%
	Total	100%
US Divisions	New England	5%
	Middle Atlantic	15%
	East North Central	11%
	West North Central	7%
	South Atlantic	21%
	East South Central	4%
	West South Central	11%
	Mountain	7%
	Pacific	19%
		Total

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

Other sources in the report include Wine Intelligence market experience, secondary sources and trade interviews.

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Wine Intelligence London (Head Office)

109 Maltings Place
169 Tower Bridge Road
London
SE1 3LJ

Telephone: +44 (0)20 8194 0090

Email: info@wineintelligence.com

Website: www.wineintelligence.com

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