



WINE INTELLIGENCE

# OPPORTUNITIES FOR LOW- AND NO-ALCOHOL WINE IN THE US MARKET

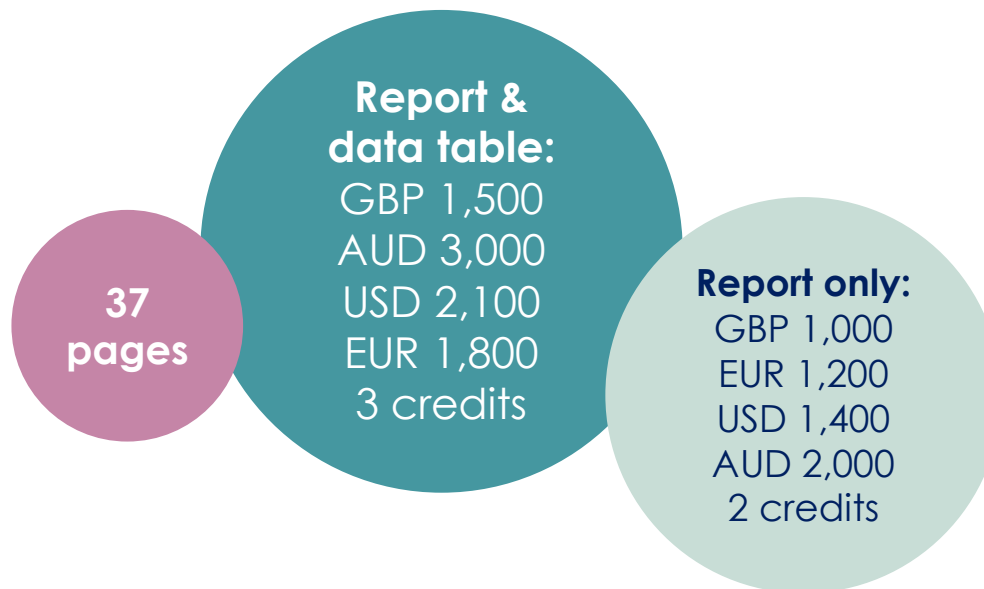
MARCH 2021

REPORT BROCHURE



## PRICING

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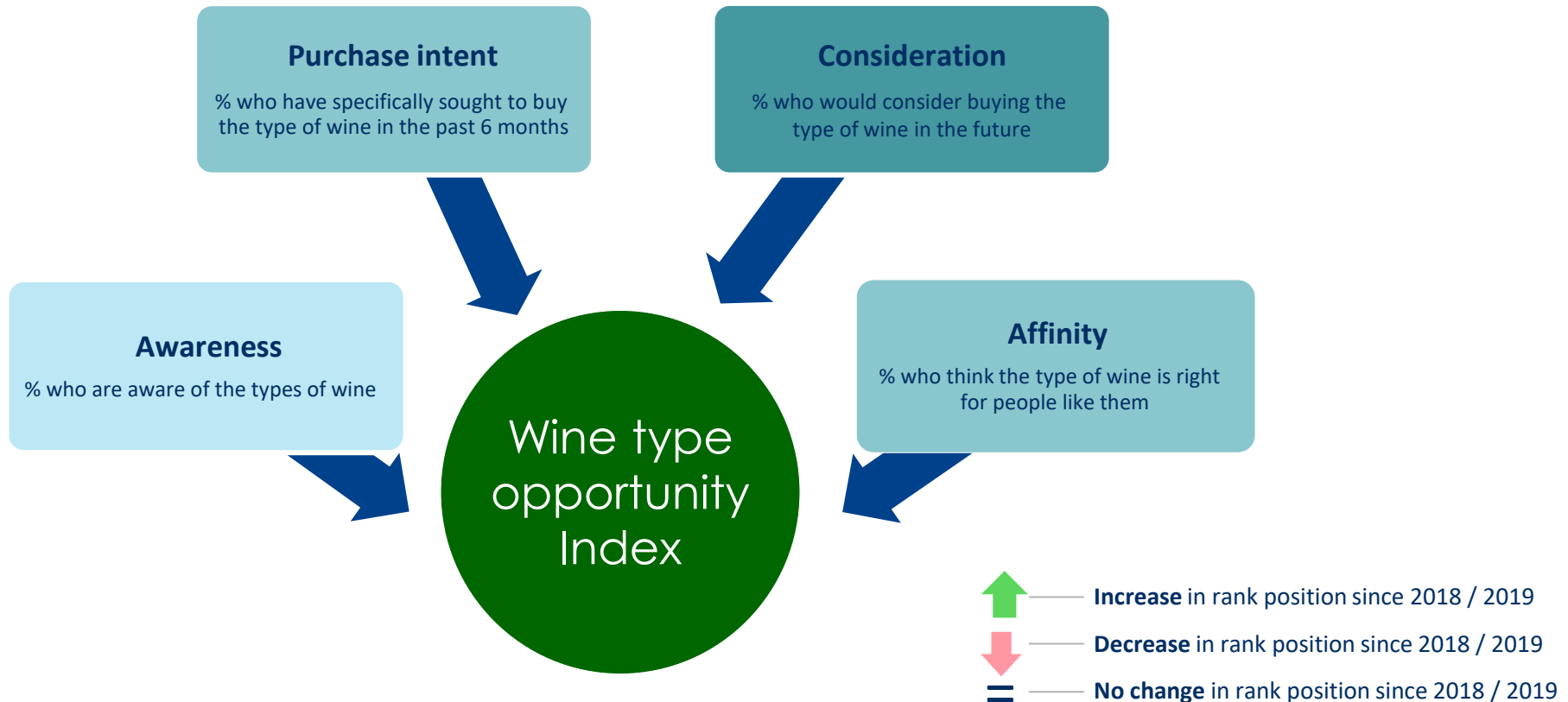


# CONTEXT: WINE TYPE OPPORTUNITY INDEX



Using four measures (awareness, intent to purchase, purchase consideration and affinity) this index shows the strength of opportunity for alternative wine types

- The index is **weighted to reflect the size of the wine drinking population** in each market, enabling the wine opportunity index to be **reflective of the global market opportunity**



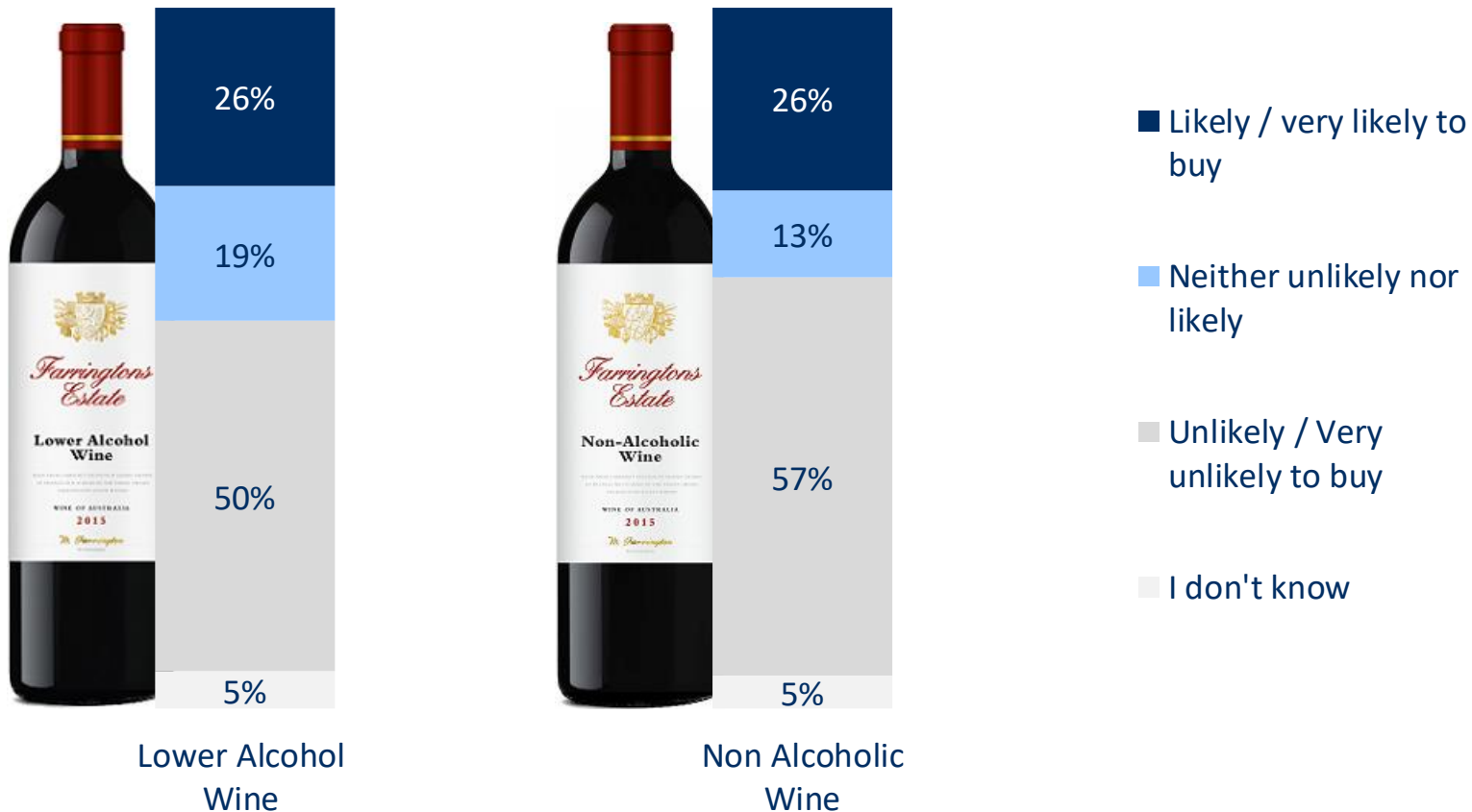
## EXAMPLE SLIDE: PURCHASE INTENT: BASED ON CLAIMS ON WINE LABELS



Bottles labelled as lower- and non-alcoholic wine have a similar, and relatively low, purchase intent among US regular wine drinkers

### Intent to purchase

% who would be likely or very likely to buy each wine  
Base = All US regular wine drinkers (n=2,000)



## EXAMPLE SLIDE: LOWER-ALCOHOL WINE PURCHASE MOTIVATION



The main driver for consumers to choose lower-alcohol wine is the perceived health benefits – including lower calorie – and because of the taste profile; younger drinkers are strongly motivated by the desire to stay in control

### Lower-alcohol wine purchase motivation: By gender, age and involvement

% who selected the following statements as motivations to buy lower alcohol wines

Base = Those who have sought to buy lower alcohol wine in the past 6 months or would consider buying it in the future

		Gender		Age			Wine Involvement		
		Male	Female	21-34	35-54	55+	Low	Medium	High
It's better for my health	55%	56%	53%	45%	60%	62%	50%	62%	50%
I enjoy the taste	54%	60%	47%	48%	60%	54%	35%	54%	62%
Less calories than other wines	44%	43%	45%	46%	38%	50%	42%	51%	38%
I like to stay in control	43%	42%	45%	59%	40%	27%	44%	45%	42%
It goes better with food	35%	39%	29%	43%	32%	28%	19%	31%	45%
It gives me fewer headaches	34%	32%	37%	36%	34%	31%	34%	33%	36%
I will be driving	30%	32%	27%	28%	26%	37%	23%	26%	36%
Price is lower than standard wine	29%	30%	28%	28%	30%	31%	31%	35%	24%
I'm on a diet	20%	19%	21%	27%	15%	15%	31%	19%	16%
Most of my friends are drinking it	15%	17%	12%	19%	20%	3%	8%	10%	23%
I like to be seen drinking it	13%	17%	9%	18%	18%	2%	9%	8%	20%
Other	1%	2%	1%	1%	2%	0%	3%	1%	1%
None of these / no opinion	4%	2%	6%	2%	5%	4%	0%	5%	4%
I would not consider drinking lower alcohol wines	1%	1%	2%	1%	1%	1%	0%	1%	2%

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

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

# US RESEARCH METHODOLOGY: QUANTITATIVE



- The data was collected in the US since March 2019
- The following wave October 2020 was tracked against March 2019
- 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>Mar-19</i>	<i>Oct-20</i>
		<i>n=</i>	<i>2,000</i>
<b>Gender</b>	Male	50%	51%
	Female	50%	49%
	<b>Total</b>	<b>100%</b>	<b>100%</b>
<b>Age</b>	21-24	8%	7%
	25-34	22%	21%
	35-44	14%	20%
	45-54	18%	14%
	55-64	18%	15%
	65 and over	21%	22%
	<b>Total</b>	<b>100%</b>	<b>100%</b>
<b>US Divisions</b>	New England	6%	5%
	Middle Atlantic	14%	15%
	East North Central	13%	11%
	West North Central	4%	7%
	South Atlantic	20%	21%
	East South Central	5%	4%
	West South Central	11%	11%
	Mountain	6%	7%
	Pacific	21%	19%
	<b>Total</b>	<b>100%</b>	<b>100%</b>

Source: Wine Intelligence, Vinitrac® US, March 19 and 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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