



WINE INTELLIGENCE

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

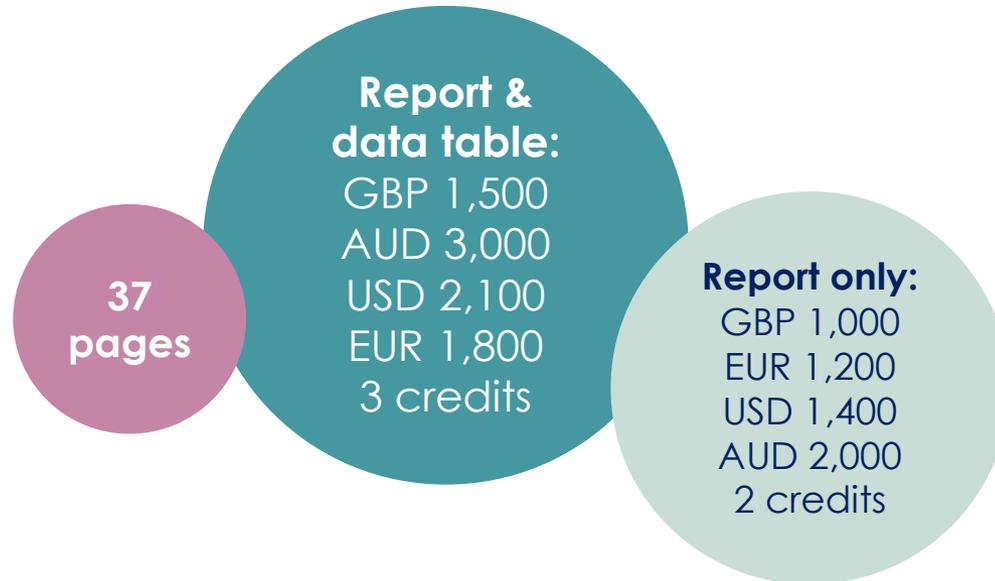
MARCH 2021

REPORT BROCHURE



# PRICING

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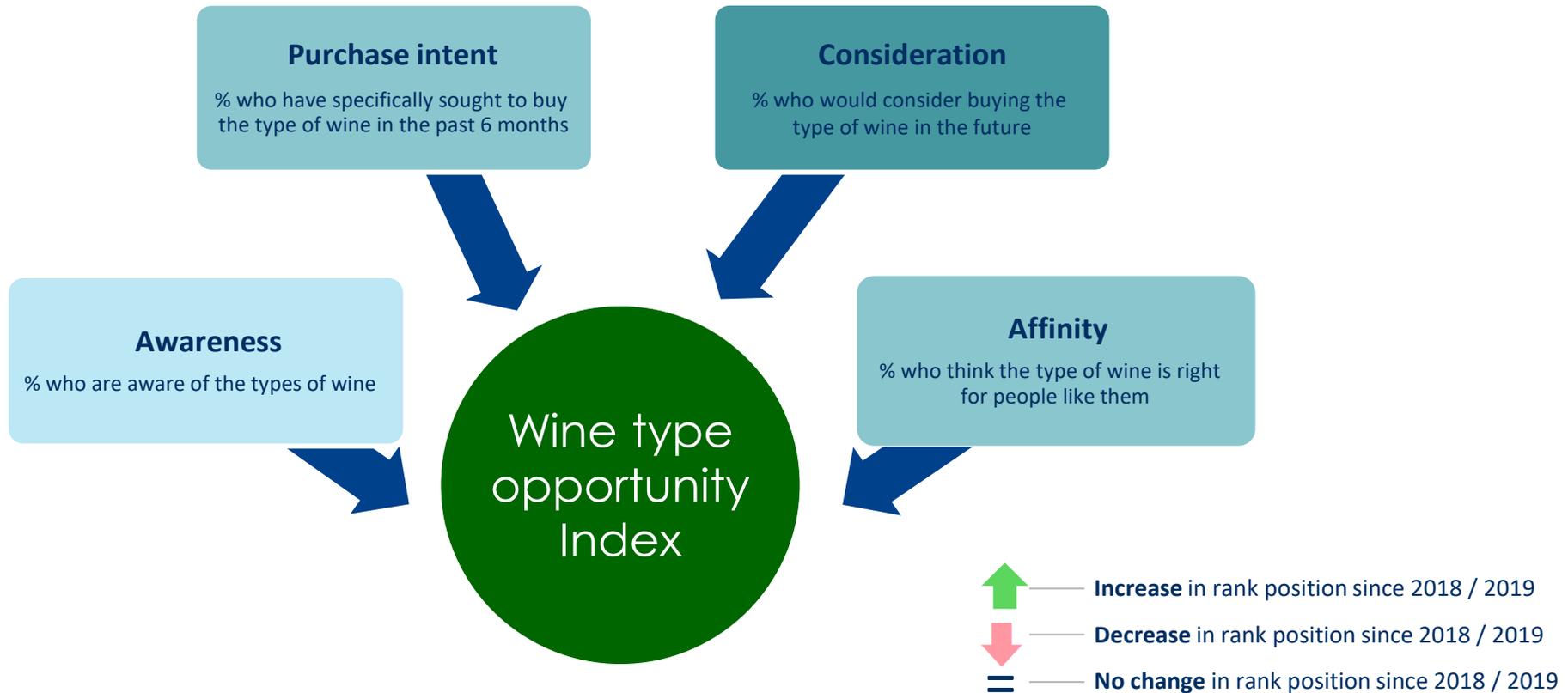


# CONTEXT: WINE TYPE OPPORTUNITY INDEX



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**



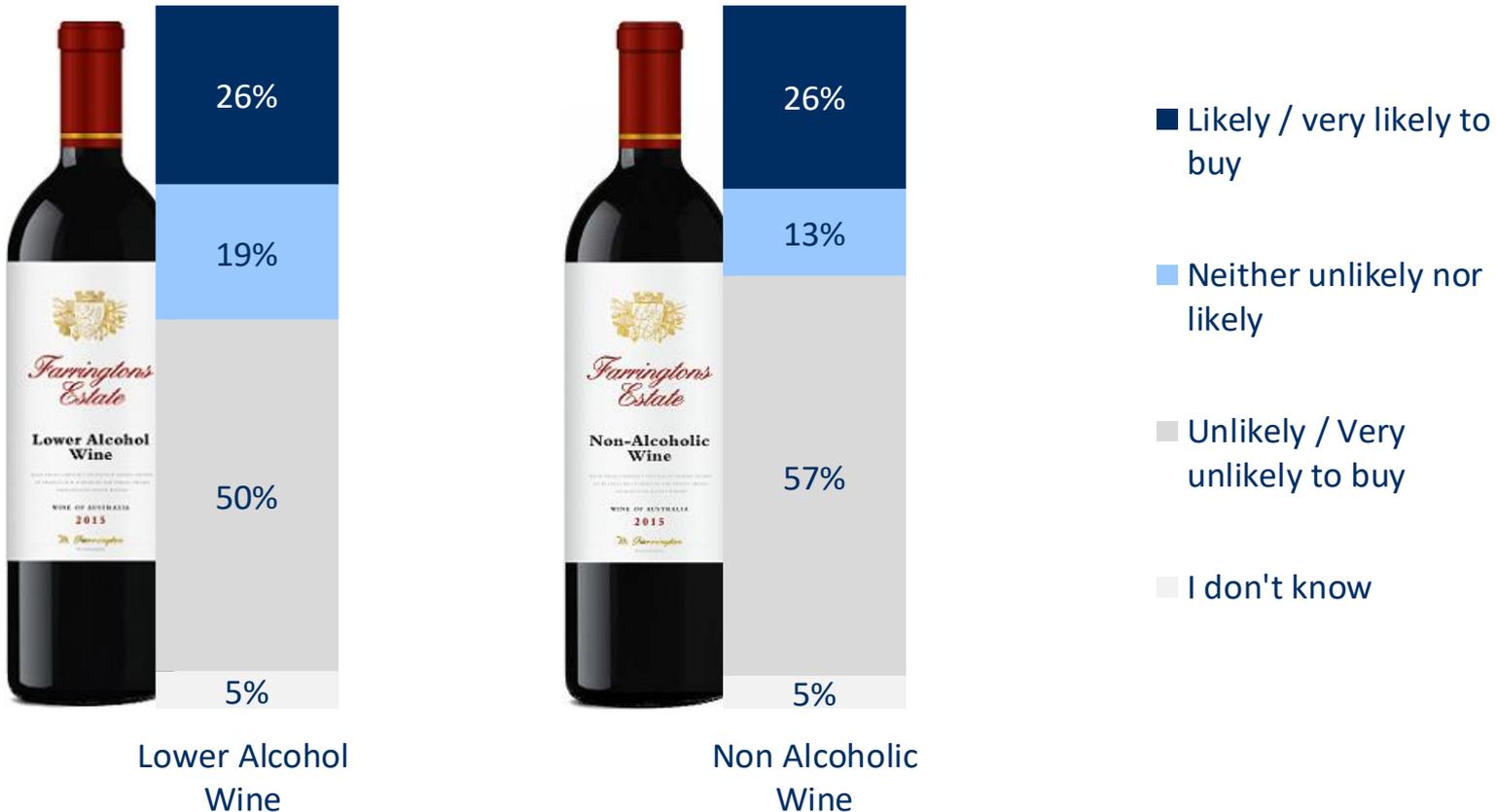
# EXAMPLE SLIDE: PURCHASE INTENT: BASED ON CLAIMS ON WINE LABELS



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>n=</i> | <b>Mar-19<br/>2,000</b> | <b>Oct-20<br/>2,000</b> |
|---------------------|--------------------|-----------|-------------------------|-------------------------|
| <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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