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<td>High Frequency Wine Drinkers: Ethnicity/Race</td>
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The purpose of this handbook is to provide Wine Market Council members with ready-made slides to use in presentations and other business activities.

This handbook includes detailed slides on the breakdown of U.S. adults by alcohol consumption frequency, topline results by total wine drinkers, and key measures among high frequency wine drinkers.

For those in a membership tier that has access to all Wine Market Council data tabulations, the ORC segmentation study data is available upon request. Data is available on the following variables:

- **Total wine drinkers**
  - Based on the responses of 2,512 U.S. adults 21+ who drink wine at least once every 2 – 3 months.
  - Data also available by gender, age bands (20s, 30s, 40s, 50s, 60+), ethnicity/race, purchase frequency by price categories, frequency of box wine purchases, some major geographic regions, rosé wine consumption, and sparkling wine consumption.

- **Total high frequency wine drinkers**
  - Based on the responses of 896 U.S. adults 21+ who drink wine more often than once a week.
  - Data also available by gender, age bands (20s, 30s, 40s, 50s, 60+), ethnicity/race, purchase frequency by price categories, frequency of box wine purchases, some major geographic regions, rosé wine consumption, and sparkling wine consumption.
Occasional wine drinkers
- Based on the responses of 1,616 U.S. adults 21+ who drink wine once a week or less often.
- Data also available by gender and 10 year age bands (20s, 30s, 40s, 50s, 60+).

Beer and spirits drinkers who consume no wine (demographics only)
- Based on the responses of 1,483 U.S. adults 21+ who drink beer and/or spirits, but not wine.

Infrequent wine drinkers (demographics only)
- Based on the responses of 490 U.S. adults 21+ who drink alcohol only every 2 – 3 months or less often.

Abstainers (demographics only)
- Based on the responses of 1,815 U.S. adults 21+ who never drink alcohol.

This research is proprietary to Wine Market Council members. Proper attribution is required for use and is included on each slide.

As this set of slides is not exhaustive, please direct requests for additional slides based on the above data breakdowns, as well as requests for full data tabulations and other questions to Jennifer Pagano, Director or Research at jpagano@winemarketcouncil.com.
ORC Segmentation Study Methodology

✓ Survey was fielded in June and July, 2017 by ORC International in partnership with Illuminate Market Research.

✓ Survey was conducted among a representative sample of U.S. adults adjusted to current Census Bureau demographic data using a proprietary weighting scheme.

✓ 5,810 U.S. adults were polled to determine U.S. wine consumer incidence.

✓ 2,512 wine consumers who drink wine at least once every two or three months participated in the study.

Notes:

▪ Wine drinkers are defined as those who drink wine at least once every 2 – 3 months, High Frequency wine drinkers as those who drink wine more often than once a week, and Occasional wine drinkers as those who drink wine once a week or less often, but at least once every 2 – 3 months.

▪ All data included in this handbook is based on self-reported consumer survey participant responses.

▪ Significance level = .05

▪ Some figures do not add to 100% due to rounding.

Wine Market Council (WMC) is furnishing these survey results "as is" and does not provide any warranty of such results whatsoever, whether express, implied, or statutory, including, but not limited to, any warranty of merchantability or fitness for a particular purpose or any warranty that the results will be error-free. In this regard, the results do not constitute advice and WMC shall have no liability for the member’s use thereof. In no respect shall WMC incur any liability for any damages including, but not limited to, direct, indirect, special, or consequential damages arising out of, resulting from, or any way connected to the use of the results, whether or not based upon warranty, contract, tort, or otherwise; whether or not injury was sustained by persons or property or otherwise; and whether or not loss was sustained from, or arose out of, the results of, the survey.
Electronic handbooks are effective in two specific ways. Primarily, they may be kept updated as new data becomes available. Secondly, they may be shared among partners with minimal effort. As such, using this handbook as a reference tool should become an adapted part of operations when preparing to present on the current nature of regular wine consumer perceptions.

The Wine Market Council focuses specifically on samples of higher frequency wine consumers. By their very nature, such a population of consumers has significantly higher consumption frequency, purchase and repurchase frequencies, as well as consideration sets than the entire population of wine consumers. Emphasizing these differences from the outset of a presentation will help assuage audience concerns about these findings being different to findings from samples of a general wine drinking population.

Specifically, high frequency consumers contribute a significantly greater revenue stream to the wine sector than their representation would suggest within the population of all wine consumers. The benefit in focusing on the perceptions of high frequency consumers is that opportunities are identified for which wine producers can best effect business strategy.

This handbook is best used by comparing the information contained within its pages alongside the characteristics of a wine business’ database of customers. Any wine business with such a database has a list of consumers that typically illustrate high frequency wine consumption. Therefore, by comparing the behavior of a winery’s customers with the results contained herein, the user of this handbook is provided with insight on emergent changes in recent wine drinking behavior, and can use such knowledge to help adapt a modern implementation of strategy.
Base: Total U.S. Adults
Wine Consumption Among U.S. Adults

- **26%**: Occasional Wine Drinker (once a week or less often, but more than once every 2–3 months)
- **27%**: Non-Wine Drinker (drink beer and/or spirits only)
- **14%**: High Frequency Wine Drinker (more often than once a week)
- **9%**: Infrequent Alcohol Consumer (drink alcohol - including wine - less than every 2-3 months)
- **24%**: Teetotaler

Base: 5,810 U.S. Adults 21+
Source: WMC – ORC Segmentation Survey June/July 2017
Wine, Beer, & Spirits Consumption*
Crossover Among Total U.S. Adults 21+

*Consume at least every 2 – 3 months

Base: 3,926 U.S. Adults 21+ who drink wine, beer, and/or spirits
Source: WMC – ORC Segmentation Survey June/July 2017
Base: Total Wine Drinkers
Additional Alcoholic Beverage Consumption Among Total Wine Drinkers

- 59% also drink beer
- 58% also drink spirits
- 25% also drink other types of alcoholic beverages

Base: 2,512 U.S. wine drinkers
Source: WMC – ORC Segmentation Survey June/July 2017
Wine, Beer, & Spirits Consumption* Crossover Among Total Wine Drinkers

- 23% Drink wine only
- 19% Drink wine & beer, no spirits
- 18% Drink wine & spirits, no beer
- 40% Drink wine, beer, & spirits

*Consume at least every 2 – 3 months

Base: 2,512 U.S. wine drinkers
Source: WMC – ORC Segmentation Survey June/July 2017
## Wine, Beer, & Spirits Consumption* Among Total Wine Drinkers by Age† and Gender

<table>
<thead>
<tr>
<th></th>
<th>21 – 29**</th>
<th>30 – 39</th>
<th>40 – 49</th>
<th>50 – 59</th>
<th>60+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drink wine only</td>
<td>21%</td>
<td>17%</td>
<td>21%</td>
<td>19%</td>
<td>30%</td>
</tr>
<tr>
<td>Drink wine, beer, &amp; spirits</td>
<td>46%</td>
<td>48%</td>
<td>43%</td>
<td>45%</td>
<td>30%</td>
</tr>
<tr>
<td>Drink wine, beer/no spirits</td>
<td>18%</td>
<td>20%</td>
<td>17%</td>
<td>18%</td>
<td>20%</td>
</tr>
<tr>
<td>Drink wine, spirits/no beer</td>
<td>16%</td>
<td>15%</td>
<td>19%</td>
<td>18%</td>
<td>20%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Male</th>
<th>Female**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drink wine only</td>
<td>15%</td>
<td>28%</td>
</tr>
<tr>
<td>Drink wine, beer, &amp; spirits</td>
<td>50%</td>
<td>34%</td>
</tr>
<tr>
<td>Drink wine, beer/no spirits</td>
<td>24%</td>
<td>15%</td>
</tr>
<tr>
<td>Drink wine, spirits/no beer</td>
<td>11%</td>
<td>23%</td>
</tr>
</tbody>
</table>

*Consume at least every 2 – 3 months
†Highlights signify statistical significance compared all segments not highlighted.
**Does not add to 100% due to rounding

Base: 2,512 U.S. wine drinkers: 20s = 375, 30s = 509, 40s = 349, 50s = 468, 60+ = 811; Males = 1,094, Females = 1,418. Source: WMC – ORC Segmentation Survey June 2017
Wine Consumption Frequency Among Total Wine Drinkers

- **9%** Every day
- **26%** More than once a week, but not every day
- **19%** Once a week
- **22%** 2 – 3 times a month
- **13%** Once a month
- **11%** Every 2 – 3 months

**High frequency wine drinkers (35%)**

**Occasional wine drinkers (65%)**

Base: 2,512 U.S. wine drinkers
Source: WMC – ORC Segmentation Survey June/July 2017
Change in Wine Consumption vs. a Couple of Years Ago Among Total Wine Drinkers

Drinking Same: 52%

Drinking More: 25%

Drinking Less: -23%

Base: 2,512 U.S. wine drinkers
Source: WMC – ORC Segmentation Survey June/July 2017
### Change in Wine Consumption vs. a Couple of Years Ago Among Total Wine Drinkers by Age

<table>
<thead>
<tr>
<th></th>
<th>21 – 29</th>
<th>30 – 39</th>
<th>40 – 49</th>
<th>50 – 59</th>
<th>60+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drinking about the same</td>
<td>26%</td>
<td>47%</td>
<td>48%</td>
<td>54%</td>
<td>66%</td>
</tr>
<tr>
<td>Drinking more</td>
<td>47%</td>
<td>28%</td>
<td>28%</td>
<td>24%</td>
<td>12%</td>
</tr>
<tr>
<td>Drinking less</td>
<td>27%</td>
<td>25%</td>
<td>24%</td>
<td>22%</td>
<td>22%</td>
</tr>
<tr>
<td>Net percentage point change</td>
<td>+20</td>
<td>+3</td>
<td>+4</td>
<td>+2</td>
<td>-10</td>
</tr>
<tr>
<td>(drinking more – drinking less)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Highlights signify statistical significance compared to all unhighlighted consumer segments.*

Base: 2,512 U.S. wine drinkers: 20s = 375, 30s = 509, 40s = 349, 50s = 468, 60+ = 811; Source: WMC – ORC Segmentation Survey June 2017
Estimated Color/Style Make Up of Total Wine Consumed (Total Wine Drinkers)

- Red: 42%
- White: 33%
- Blush/Rose: 11%
- Sparkling: 8%
- Other*: 5%

*Such as flavored wine like sangria, wine-based beverages like spritzers, or orange wine.

Base: 2,512 U.S. wine drinkers
Source: WMC – ORC Segmentation Survey June/July 2017
## Estimated Color/Style Make Up of Total Wine Consumed (Total Wine Drinkers) by Age *

<table>
<thead>
<tr>
<th></th>
<th>21 – 29</th>
<th>30 – 39</th>
<th>40 – 49</th>
<th>50 – 59</th>
<th>60+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Red wine</td>
<td>35%</td>
<td>41%</td>
<td>40%</td>
<td>44%</td>
<td>45%</td>
</tr>
<tr>
<td>White wine</td>
<td>33%</td>
<td>30%</td>
<td>32%</td>
<td>31%</td>
<td>37%</td>
</tr>
<tr>
<td>Blush/rose wine</td>
<td>12%</td>
<td>12%</td>
<td>13%</td>
<td>12%</td>
<td>10%</td>
</tr>
<tr>
<td>Sparkling wine</td>
<td>11%</td>
<td>11%</td>
<td>9%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>Other types of wine</td>
<td>9%</td>
<td>6%</td>
<td>6%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>Total volume consumed</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
<td>100%</td>
</tr>
</tbody>
</table>

*Highlights signify statistical significance compared to all unhighlighted consumer segments.

Base: 2,512 U.S. wine drinkers: 20s = 375, 30s = 509, 40s = 349, 50s = 468, 60+ = 811; Source: WMC – ORC Segmentation Survey June 2017
## Estimated Color/Style Make Up of Total Wine Consumed (Total Wine Drinkers) by Gender

<table>
<thead>
<tr>
<th>Wine Type</th>
<th>Male *</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Red wine</td>
<td>51%</td>
<td>35%</td>
</tr>
<tr>
<td>White wine</td>
<td>29%</td>
<td>37%</td>
</tr>
<tr>
<td>Blush/rose wine</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>Sparkling wine</td>
<td>6%</td>
<td>10%</td>
</tr>
<tr>
<td>Other types of wine</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td><strong>Total volume consumed</strong></td>
<td><strong>100%</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

*Does not add to 100% due to rounding

Base: 2,512 U.S. wine drinkers: Males = 1,094, Females = 1,418.
Source: WMC – ORC Segmentation Survey June 2017
Estimated Domestic/Imported Wine Make Up of Total Wine Consumed (Total Wine Drinkers)

- Domestic Wine: 70%
- Imported Wine: 30%

Base: 2,512 U.S. wine drinkers
Source: WMC – ORC Segmentation Survey June/July 2017
### Wine Purchase Frequency by Price Category Among Total Wine Drinkers

<table>
<thead>
<tr>
<th>Price Category</th>
<th>Weekly</th>
<th>Monthly</th>
<th>Several times a year</th>
<th>Once a year or less</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $10</td>
<td>15%</td>
<td>23%</td>
<td>30%</td>
<td>12%</td>
<td>21%</td>
</tr>
<tr>
<td>$10 - $14.99</td>
<td>10%</td>
<td>26%</td>
<td>37%</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>$15 - $19.99</td>
<td>5%</td>
<td>17%</td>
<td>32%</td>
<td>22%</td>
<td>24%</td>
</tr>
<tr>
<td>$20 - $29.99</td>
<td>3%</td>
<td>8%</td>
<td>20%</td>
<td>25%</td>
<td>44%</td>
</tr>
<tr>
<td>$30 - $49.99</td>
<td>2%</td>
<td>5%</td>
<td>11%</td>
<td>18%</td>
<td>64%</td>
</tr>
<tr>
<td>$50 - $74.99</td>
<td>1%</td>
<td>3%</td>
<td>6%</td>
<td>12%</td>
<td>78%</td>
</tr>
<tr>
<td>$75 - $99.99</td>
<td>1%</td>
<td>2%</td>
<td>4%</td>
<td>10%</td>
<td>83%</td>
</tr>
<tr>
<td>$100 or more</td>
<td>1%</td>
<td>2%</td>
<td>2%</td>
<td>9%</td>
<td>86%</td>
</tr>
</tbody>
</table>

Base: 2,512 U.S. wine drinkers  
Source: WMC – ORC Segmentation Survey June/July 2017
Wine Purchase Frequency by Package Size Among Total Wine Drinkers

Base: 2,512 U.S. wine drinkers
Source: WMC – ORC Segmentation Survey June/July 2017
Total Wine Drinkers: Gender

- Males: 41%
- Females: 59%

Base: 2,512 U.S. wine drinkers
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
Total Wine Drinkers: Age

- 21 - 29: 14%
- 30 - 39: 19%
- 40 - 49: 16%
- 50 - 59: 19%
- 60 - 69: 20%
- 70+: 10%

Base: 2,512 U.S. wine drinkers
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
Total Wine Drinkers: Generation

- Baby Boomer (53 – 71): 36%
- Generation X (41 – 52): 21%
- Millennial (23 - 40): 33%
- Older (72+): 7%
- iGeneration (21 – 22): 3%

Base: 2,512 U.S. wine drinkers
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
Total Wine Drinkers: Top States Represented

- California: 12%
- Texas: 8%
- Florida: 9%
- New York: 6%
- Pennsylvania: 5%
- Ohio: 4%
- Illinois: 4%

Base: 2,512 U.S. wine drinkers
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
Total Wine Drinkers: Marital Status and Household Ownership

- Married: 57%
- Single, never married: 20%
- Divorced: 9%
- Widowed: 5%
- Separated: 1%
- Living with a partner: 8%
- Own Home: 73%
- Rent Home: 27%

Base: 2,512 U.S. wine drinkers
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
Total Wine Drinkers: Household Make Up

- **Children Living in Home**
  - 6 or younger: 33%
  - 7 - 12 years old: 34%
  - 13 - 17 years old: 33%

- **Household Breakdown**
  - One Adult Household: 21%
  - Two Adult Household: 60%
  - Three Adult Household: 12%
  - Four+ Adult Household: 7%

*Base: 2,512 U.S. wine drinkers*
*Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses*
Total Wine Drinkers: Education

- High school graduate or less: 27%
- Some college: 18%
- Technical degree/2-year degree: 11%
- College graduate: 22%
- Postgraduate work or degree: 23%

Base: 2,512 U.S. wine drinkers
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
Total Wine Drinkers: Employment Status

- Work full time: 47%
- Retired: 25%
- Work part time: 8%
- Self employed: 7%
- Homemaker: 7%
- Not employed: 4%
- Student: 2%

Base: 2,512 U.S. wine drinkers
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
Total Wine Drinkers: Income
(Total household income before taxes in 2016)

Under $35,000: 18%
$35,000 - $49,999: 13%
$50,000 - $74,999: 22%
$75,000 - $99,999: 17%
$100,000 - $149,000: 19%
$150,000 or more: 12%

Base: 2,512 U.S. wine drinkers
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
Total Wine Drinkers: Ethnicity/Race

- Caucasian/Non-Hispanic: 71%
- Hispanic: 14%
- Black/African American: 9%
- Mixed Race/Other: 4%
- Asian: 3%

Base: 2,512 U.S. wine drinkers
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
Base: Total Wine Drinkers by Wine Consumption Frequency

(Key Differences Between High Frequency Wine Drinkers and Occasional Wine Drinkers)
# High Frequency vs. Occasional Wine Drinkers by Gender, Age, and Generation

<table>
<thead>
<tr>
<th></th>
<th>High Frequency Wine Drinkers</th>
<th>Occasional Wine Drinkers</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gender</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Male</td>
<td>43%</td>
<td>40%</td>
</tr>
<tr>
<td>Female</td>
<td>57%</td>
<td>60%</td>
</tr>
<tr>
<td><strong>Age</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>21 - 29</td>
<td>12%</td>
<td>17%</td>
</tr>
<tr>
<td>30 - 39</td>
<td>16%</td>
<td>20%</td>
</tr>
<tr>
<td>40 - 49</td>
<td>13%</td>
<td>14%</td>
</tr>
<tr>
<td>50 - 59</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>60 - 69</td>
<td>24%</td>
<td>20%</td>
</tr>
<tr>
<td>70+</td>
<td>17%</td>
<td>11%</td>
</tr>
<tr>
<td><strong>Mean Age</strong></td>
<td>52.6</td>
<td>48.0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>High Frequency Wine Drinkers*</th>
<th>Occasional Wine Drinkers*</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Generation</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>iGeneration (21 – 22)</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Millennial (23 – 40)</td>
<td>26%</td>
<td>35%</td>
</tr>
<tr>
<td>Gen X (41 – 52)</td>
<td>18%</td>
<td>20%</td>
</tr>
<tr>
<td>Baby Boomer (53 – 71)</td>
<td>42%</td>
<td>34%</td>
</tr>
<tr>
<td>Older (72+)</td>
<td>12%</td>
<td>7%</td>
</tr>
</tbody>
</table>

*Does not add to 100% due to rounding.

Base: 896 High Frequency (more often than once a week) and 1,376 Occasional (once a week or less often)
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
Wine, Beer, & Spirits Consumption* Crossover
(Total wine drinkers by consumption frequency)

Base: 896 High Frequency (more often than once a week) and 1,376 Occasional (once a week or less often)
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses

*Consume at least every 2 – 3 months
Change in Wine Consumption vs. a Couple of Years Ago
(Total wine drinkers by consumption frequency*)

High Frequency Wine Drinkers

- Drinking Same: 52%
- Drinking More: 35% (+22)
- Drinking Less: -13%

Occasional Wine Drinkers*

- Drinking Same: 51%
- Drinking More: 19% (-10)
- Drinking Less: -29%

*Does not add to 100% due to rounding

Base: 896 High Frequency (more often than once a week) and 1,376 Occasional (once a week or less often)
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
Total Wine Consumption by Color/Style
(Total wine drinkers by consumption frequency)

High Frequency Wine Drinkers*

- Red: 34%
- White: 10%
- Blush/Rose: 7%
- Sparkling: 4%
- Other**: 4%

Occasional Wine Drinkers

- Red: 40%
- White: 33%
- Blush/Rose: 12%
- Sparkling: 9%
- Other**: 6%

*Does not add to 100% due to rounding
**Such as flavored wine like sangria, wine-based beverages like spritzers, or orange wine

Base: 896 High Frequency (more often than once a week) and 1,376 Occasional (once a week or less often)
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
Total Wine Consumption: Domestic vs. Imported Wine
(Total wine drinkers by consumption frequency*)

Base: 896 High Frequency (more often than once a week) and 1,376 Occasional (once a week or less often)
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
Monthly/Weekly Purchase by Price Category
(Total wine drinkers by consumption frequency)

Base: 896 High Frequency (more often than once a week) and 1,376 Occasional (once a week or less often)
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
Monthly/Weekly Purchase by Package Size
(Total wine drinkers by consumption frequency)

- 750ml bottle: 78% (High Frequency), 40% (Occasional)
- 1.5 liter bottle: 24% (High Frequency), 6% (Occasional)
- Bag in box: 19% (High Frequency), 4% (Occasional)
- 375ml bottle: 16% (High Frequency), 5% (Occasional)
- 187ml bottle(s): 15% (High Frequency), 7% (Occasional)
- 3 liter bottle: 11% (High Frequency), 3% (Occasional)
- Pouch: 9% (High Frequency), 2% (Occasional)
- Can: 8% (High Frequency), 2% (Occasional)
- Tetra Pak: 8% (High Frequency), 2% (Occasional)

Base: 896 High Frequency (more often than once a week) and 1,376 Occasional (once a week or less often)
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
Base: Total High Frequency Wine Drinkers
Wine, Beer, & Spirits Consumption* Crossover Among High Frequency Wine Drinkers

- Drink wine only: 18%
- Drink wine & beer, no spirits: 18%
- Drink wine & spirits, no beer: 19%
- Drink wine, beer, & spirits: 45%

*Consume at least every 2 – 3 months

Base: 896 U.S. High Frequency wine drinkers (drink wine more often than once a week)
Source: WMC – ORC Segmentation Survey June/July 2017
Additional Alcoholic Beverage Consumption Among High Frequency Wine Drinkers

- 63% Also drink beer
- 64% Also drink spirits
- 22% Also drink other types of alcoholic beverages

Base: 896 U.S. High Frequency wine drinkers (drink wine more often than once a week)  
Source: WMC – ORC Segmentation Survey June/July 2017
Change in Wine Consumption vs. a Couple of Years Ago Among High Frequency Wine Drinkers

- Drinking Same: 52%
- Drinking More: 35%
- Drinking Less: 13%

Base: 896 U.S. High Frequency wine drinkers (drink wine more often than once a week)
Source: WMC – ORC Segmentation Survey June/July 2017
Total Wine Consumption by Color/Style Among High Frequency Wine Drinkers

*Does not add to 100% due to rounding
**Such as flavored wine like sangria, wine-based beverages like spritzers, or orange wine

Base: 896 U.S. High Frequency wine drinkers (drink wine more often than once a week)
Source: WMC – ORC Segmentation Survey June/July 2017
Total Wine Consumption: Domestic vs. Imported Wine Among High Frequency Wine Drinkers

- 68% Domestic Wine
- 32% Imported Wine

Base: 896 U.S. High Frequency wine drinkers (drink wine more often than once a week)
Source: WMC – ORC Segmentation Survey June/July 2017
Total Wine Consumption: Domestic vs. Imported Wine Among High Frequency Wine Drinkers by Age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Domestic Wine</th>
<th>Imported Wine</th>
</tr>
</thead>
<tbody>
<tr>
<td>21-29</td>
<td>58%</td>
<td>42%</td>
</tr>
<tr>
<td>30-39</td>
<td>63%</td>
<td>37%</td>
</tr>
<tr>
<td>40-49</td>
<td>66%</td>
<td>34%</td>
</tr>
<tr>
<td>50-59</td>
<td>74%</td>
<td>26%</td>
</tr>
<tr>
<td>60+</td>
<td>70%</td>
<td>30%</td>
</tr>
</tbody>
</table>

Base: 896 High Frequency wine drinkers (drink wine more often than once a week): 20s = 101, 30s = 156, 40s = 112, 50s = 166, 60+ = 361. Source: WMC – ORC Segmentation Survey June 2017
Wine Purchase Frequency by Price Category Among High Frequency Wine Drinkers

<table>
<thead>
<tr>
<th>Price Category</th>
<th>Monthly/Weekly</th>
<th>Never</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $10</td>
<td>57%</td>
<td>16%</td>
</tr>
<tr>
<td>$10 - $14.99</td>
<td>57%</td>
<td>10%</td>
</tr>
<tr>
<td>$15 - $19.99</td>
<td>37%</td>
<td>20%</td>
</tr>
<tr>
<td>$20 - $20.99</td>
<td>33%</td>
<td>20%</td>
</tr>
<tr>
<td>$30 - $49.99</td>
<td>53%</td>
<td>12%</td>
</tr>
<tr>
<td>$50 - $74.99</td>
<td>69%</td>
<td>8%</td>
</tr>
<tr>
<td>$75 - $99.99</td>
<td>76%</td>
<td>6%</td>
</tr>
<tr>
<td>$100 or more</td>
<td>79%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Base: 896 U.S. High Frequency wine drinkers (drink wine more often than once a week)
Source: WMC – ORC Segmentation Survey June/July 2017
Wine Purchase Frequency by Package Size Among High Frequency Wine Drinkers

Base: 896 U.S. High Frequency wine drinkers (drink wine more often than once a week)
Source: WMC – ORC Segmentation Survey June/July 2017
High Frequency Wine Drinkers: Gender

- Males: 43%
- Females: 57%

Base: 896 U.S. High Frequency wine drinkers (drink wine more often than once a week)
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
High Frequency Wine Drinkers: Age

Base: 896 U.S. High Frequency wine drinkers (drink wine more often than once a week)
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
High Frequency Wine Drinkers: Generation

- Baby Boomer (52 - 70) 41%
- Millennial (23 - 40) 25%
- Gen X (41 – 52) 18%
- Older (72+) 12%
- iGeneration (21 – 22) 3%

Base: 896 U.S. High Frequency wine drinkers (drink wine more often than once a week)
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
High Frequency Wine Drinkers: Marital Status and Household Ownership

Married: 62%
Single, never married: 15%
Divorced: 9%
Widowed: 5%
Separated: 1%
Living with a partner: 8%

Own Home: 77%
Rent Home: 23%

Base: 896 U.S. High Frequency wine drinkers (drink wine more often than once a week)
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
High Frequency Wine Drinkers: Household Make Up

- One Adult Household: 20%
- Two Adult Household: 64%
- Three Adult Household: 10%
- Four+ Adult Household: 6%
- No Children Living in Home: 75%
- Children Living in Home: 25%
  - 6 or younger: 27%
  - 7 - 12 years old: 38%
  - 13 - 17 years old: 35%

Base: 896 U.S. High Frequency wine drinkers (drink wine more often than once a week)
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
High Frequency Wine Drinkers: Education

- High school graduate or less: 24%
- Some college: 17%
- Technical degree/2-year degree: 10%
- College graduate: 24%
- Postgraduate work or degree: 25%

Base: 896 U.S. High Frequency wine drinkers (drink wine more often than once a week)
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
High Frequency Wine Drinkers: Employment Status*

- Work full time: 43%
- Retired: 31%
- Work part time: 8%
- Student: 2%
- Not employed: 3%
- Homemaker: 5%
- Self employed: 9%

*Does not add to 100% due to rounding

Base: 896 U.S. High Frequency wine drinkers (drink wine more often than once a week)
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
High Frequency Wine Drinkers: Income
(Total household income before taxes in 2016)

- Under $35,000: 14%
- $35,000 - $49,999: 13%
- $50,000 - $74,999: 22%
- 75,000 - $99,999: 15%
- $100,000 - $149,000: 22%
- $150,000 or more: 14%

Base: 896 U.S. High Frequency wine drinkers (drink wine more often than once a week)
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses
High Frequency Wine Drinkers: Ethnicity/Race

Base: 896 U.S. High Frequency wine drinkers (drink wine more often than once a week)
Source: ORC demographic question based on June/July 2017 WMC - ORC Segmentation Survey responses