



**2021-2022 Wine Market Council
U.S. Wine Consumer Segmentation Slide Handbook**

June 2022

Segmentation Survey Handbook - Contents

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 charts and tables based on data on the following topics:

- Methodology, Terms, Usage.....Page 3
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- Frequency of Wine Consumption Among Wine Drinkers..... Page 25
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Survey Methodology

This survey was designed by the Wine Market Council, with most of the questions maintaining the same wording and format as benchmark segmentation surveys since 2015. It was conducted by ENGINE INSIGHTS, among a sample of 7,580 adults 21 years of age and older, using their Caravan online omnibus system.

The Caravan online omnibus study is conducted three times a week among a demographically representative U.S. sample of 1,000 adults, 18 years of age and older. This survey was fielded on September 24-26, October 1-3, October 11-13, October 20-22, November 5-7, and November 8-10, 2021. Two additional waves were fielded on March 2-3 and 5-6 of 2022; however, only the three basic segmentation questions were included, along with two new questions not reported on here.

The survey was conducted among a representative sample of U.S. adults adjusted to current Census Bureau demographic data using Engine's proprietary weighting scheme. Completed surveys were weighted by six variables: age, sex, geographic region, race, education and income to ensure reliable and accurate representation of the total U.S. population, 18 years of age and older. The raw data are weighted by a custom designed program which automatically develops a weighting factor for each respondent. Each respondent is assigned a single weight derived from the relationship between the actual proportion of the population based on U.S. Census data with its specific combination of age, sex, geographic characteristics, race, education, income and the proportion in the sample.

Respondents for this survey were selected from among those who have volunteered to participate in online surveys and polls. While any sample source or survey may be subject to multiple sources of error - such as self-selection bias, sampling method bias, error associated with nonresponse or statistically improbable fluctuations – we believe the methodology chosen helps minimize these errors and is among the soundest available in the category of national wine consumer surveys.

Segmentation Survey Methodology (continued)

The Engine Caravan methodology employs a variety of algorithms during the survey to identify and screen out rote or suspect response patterns. After the close of the surveys, the data underwent additional review by WMC for validation, by comparison with other sources of data including surveys using different sampling, scanned sales, and household panels. Where a particular category of data was called into question, the raw data was examined for patterns of exaggeration or conflicting responses.

After weighting and eliminating some poor-quality respondents, the net weighted sample is 7,569. The net weighted sample of wine consumers (drink wine at least once every two or three months) was 2,486.

Notes:

- All data included in this handbook is based on self-reported consumer survey participant responses.
- Statistical significance was tested at a 95% confidence interval.
- Some figures do not add to 100% due to rounding.
- The basing and sample are not the same for every chart or table. For example, % numbers shown may represent a segment of all legal drinking age adults in the sample, or wine drinkers only. **All basing or other sample descriptions for a chart or table can be found in the footnotes on that page.**
- Many of the segment comparisons in the handbook involve core vs. marginal wine consumers. Some previous editions of the handbook focused on high frequency vs. “occasional” wine consumers. The main difference between high frequency and core wine consumers is that core includes those who drink once a week or more often, and high frequency only those who drink more often than once a week. After examining the 2019 and 2021 data, it was found that once-a-week wine drinkers had more in common with high frequency consumers than less frequent; hence the emphasis on Core consumers for the handbook. The definitions for various segments used can be seen on pages 5-6.

Terms & Definitions

The following terms and definitions are used in this report. A copy of the questionnaire is in the Appendix.

- ✓ **Wine drinkers** are defined as anyone who checked “wine” in Q1 “Which of the following kinds of alcoholic beverages do you drink at least once every two or three months?”
- ✓ **Core wine drinkers** are defined as any respondent who indicated they drink wine at least once a week on Q2.
- ✓ **Marginal wine drinkers** are defined as any respondent who indicated they drink wine 1-3 times a month on Q2, plus anyone who indicated they drink every 2-3 months AND say they prefer wine to other categories of beverage alcohol in Q3.
- ✓ **High Frequency** consumers are defined as anyone who indicated they drink wine more often than once a week in Q2.
- ✓ **High End** wine consumers are defined as high frequency wine drinkers who purchase wine costing \$20 or more per 750ml bottle, on at least a monthly basis. The question used to identify them specified “at retail” for each price range in the 2021 waves. Therefore, some respondents may not have included online, club or other direct-to-consumer purchases in their answers. This may have resulted in modest under-reporting of \$20+ purchases among some consumer segments.
- ✓ **Non-adopters** are defined as those who drink beer and/or spirits and/or other beverage alcohol at least every 2-3 months but NOT wine.
- ✓ **Infrequent alcohol consumers** are defined as those who do drink alcohol, but less often than every 2-3 months.
- ✓ **Abstainers** do not drink any form of beverage alcohol.

Terms & Definitions

The following terms and definitions are used throughout this report.

- ✓ **Generations are named (in ascending order of age) Gen Z, Millennials, Gen X, Baby Boomers (or “boomers”) and Older. The age definitions are:**
 - ✓ Gen Z was aged 21-24 in 2021.
 - ✓ Millennials were aged 25-40 in 2021.
 - ✓ Gen X was aged 41-54 in 2021.
 - ✓ Baby Boomers were aged 55-75 in 2021.
- ✓ **LDA refers to Legal Drinking Age population - U.S. adults aged 21 or older**

USER’S NOTE 1: Readers of the report should pay attention to the base for % numbers given. Where it is not stated or clearly implicated in the chart title, the base number for any percentage or proportions given can be found in the footnotes.

USER’S NOTE 2: WMC members who attended or downloaded the March 24th 2022 webinar on the Benchmark study saw the preliminary numbers based on the Fall 2021 survey waves. **Some of those numbers have changed**, although rarely by more than 1-2%. This report’s numbers are the final, official version.

USER’S NOTE 3: The Engine Caravan methodology recruits respondents and administers the survey on an English language basis, via English language media. Comparison to the WMC 2021 Multicultural study fielded by EthniFacts leads us to believe the Engine Caravan sample undercounts Hispanic wine consumers whose online activity or media consumption is primarily in Spanish; leaving out an estimated 20-25% of Hispanic wine consumers whose media or online engagement is primarily Spanish. Therefore we have adjusted all numbers based to total Hispanic LDA population or Hispanic wine drinkers via weighting the benchmark study by 80% and the EthniFacts study 20%.

Member Access to Data

This handbook is intended as a summary of the study's "topline" data for U.S. adults, wine consumers and select segments within those populations. For those in a membership tier that have access to all Wine Market Council data tabulations, the complete segmentation study data is also available upon request. Tabulated data is available for every question, on the following variables:

- Total sample
- Total wine drinkers
- Core wine drinkers
- Marginal wine drinkers
- Beer/Spirits/Other drinkers (little or no wine)
- Very infrequent drinkers and Abstainers
- By age (generation and decile)
- By gender
- By ethnicity
- High Frequency wine drinkers vs. All others
- High End wine consumers vs. High Frequency but not High-End consumers

In addition, data mining, cross-tabbing or other forms of analysis to answer specific questions can be employed on the data. If the request is unusually complex, a supplemental charge may be required. As this set of charts and tables is not exhaustive, please direct requests to Christian Miller, WMC Research Director at cmiller@winemarketcouncil.com or admin@winemarketcouncil.com.

Member Advisory

At Wine Market Council, we take measures to make the Benchmark Segmentation Survey the most comprehensive and accurate survey of wine consumers in the U.S. These include using a large representative sample, stable methodology from year to year and multiple waves stretched out over time during the year. Both Engine Insights and Wine Market Council apply various quality control measures to the raw data to exclude poor quality or bogus respondents.

As a result, WMC members can use this handbook and the underlying data with confidence to:

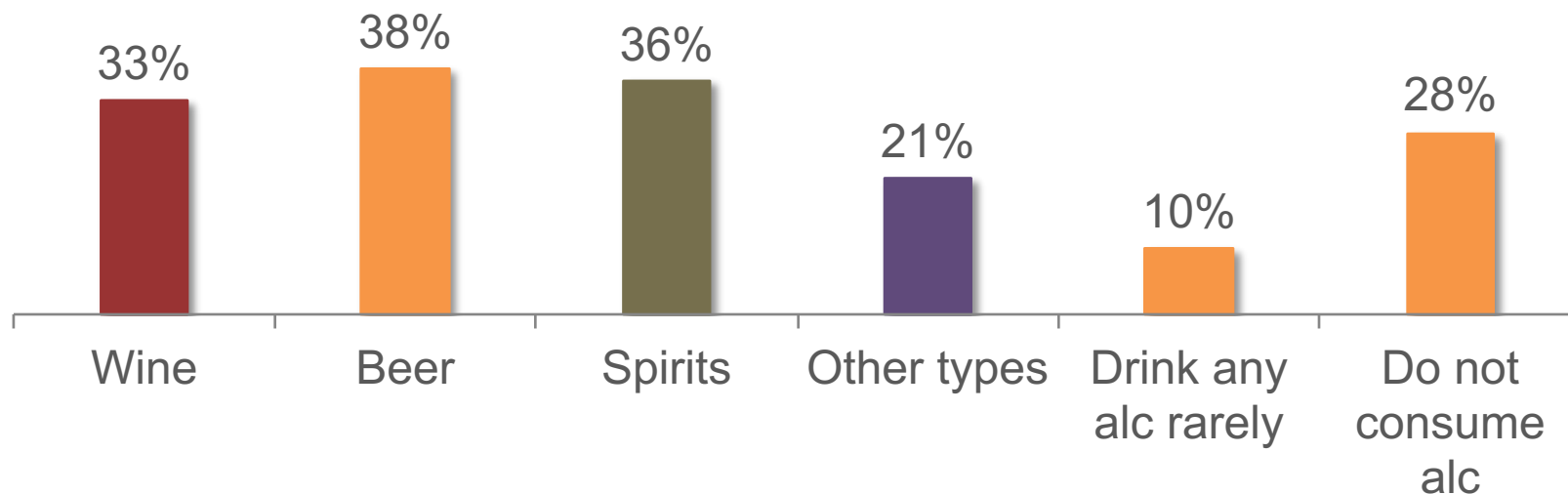
- Understand the population size of various segments of wine consumers and their demographics.
- Determine incidence rates in the population for various types of wine consumers, which is useful for planning and costing in market research or advertising.
- Assess changes and major trends in the wine market over time.
- Provide press and media with authoritative statistics on wine consumers.

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.

Consumption of Wine and other Beverage Alcohol Among U.S. Adults



% of Respondents Who Drink Alcohol - By Beverage Type

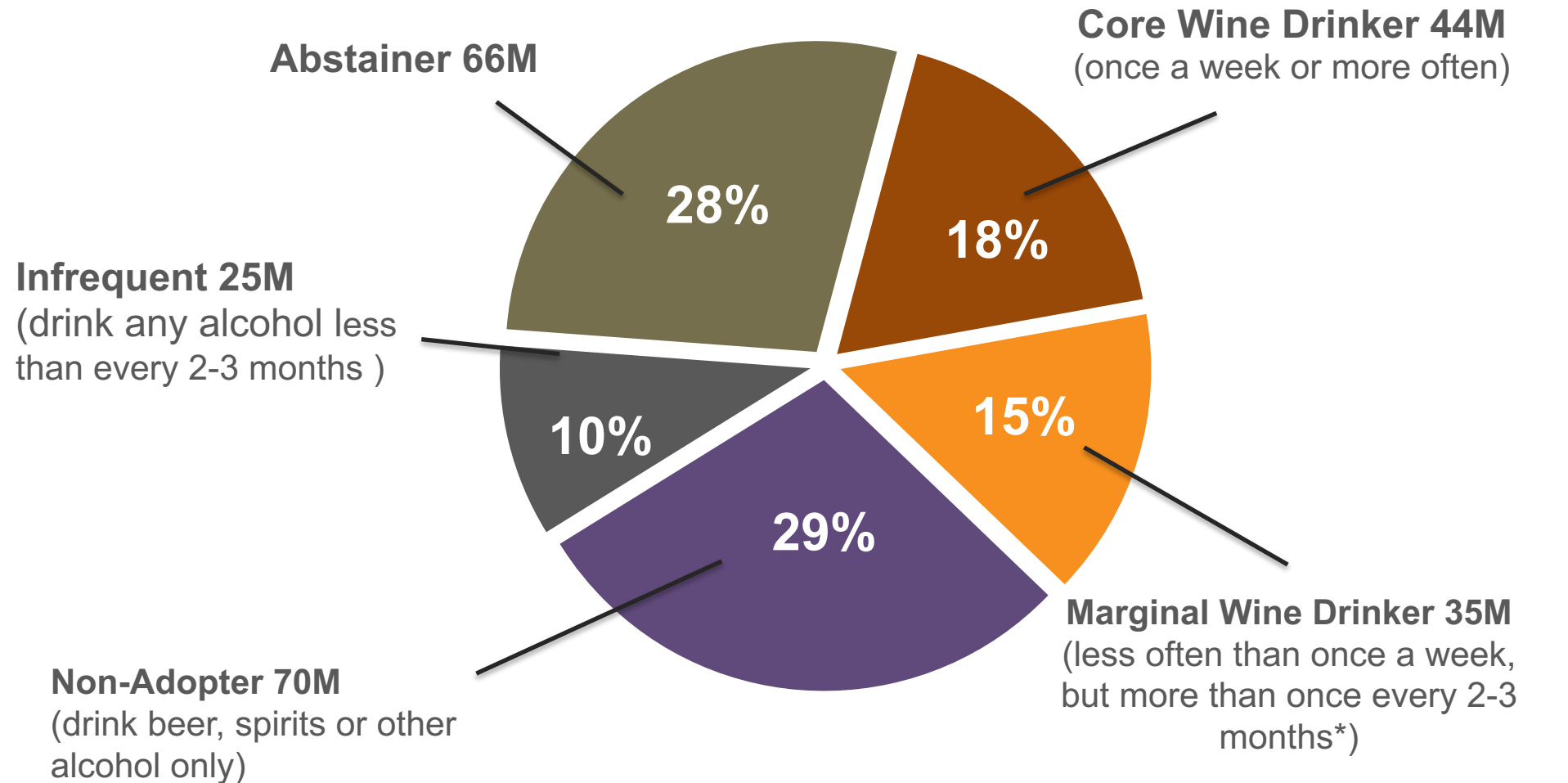


WINE MARKET COUNCIL

Base: U.S. Adults, 21+, n=7,569

Source: WMC – U.S. Wine Consumer Segmentation Survey, Fall 2021/Spring 2022 Combined Data

Beverage Alcohol Consumption Among U.S. Adults 21+ (with estimated population in millions)



WINE MARKET COUNCIL

Base: U.S. Adults 21+, n=7,569

Source: WMC – U.S. Wine Consumer Segmentation Survey, Fall 2021/Spring 2022 Combined based to US Census Estimate December 2021^{1/1}

Consumption of “Big Three” Categories Among U.S. Alcohol Consumers*

% Who Consume...	Core wine drinker	Marginal wine drinker	Non-Adopter**
Wine	100%	100%	--
Beer	61%	52%	67%
Spirits	62%	55%	56%
Other Alcohol	35%	32%	33%

*Consume some type of alcohol at least every 2 – 3 months

**Non-Adopter - Drinks beer, spirits, other alcohol but no wine

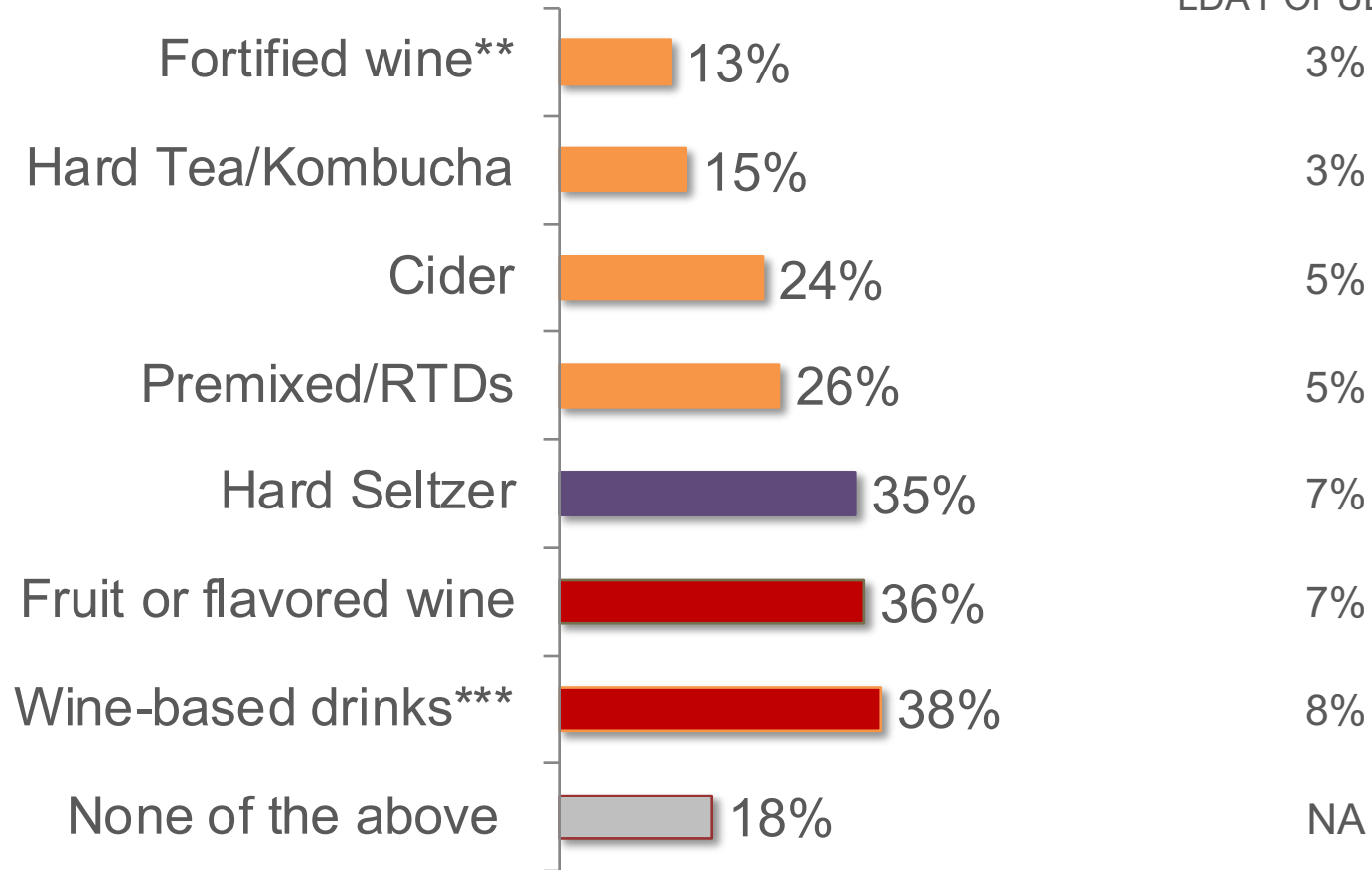
Highlighting = Statistically significantly higher than 2 of 1 other segment.

WINE MARKET COUNCIL

Base: Core wine drinkers (once a week or more), n=1,384; Marginal wine drinkers (less often than once a week but more than once every 2-3 months), n=1,103; Non-Adopter-Drink beer/spirits, no wine, n=2,217. Source: WMC – U.S. Wine Consumer Segmentation Surveys, Fall 2021/March 2022 Combined 12

% Who Drink “Other” Alcoholic Beverages - By Type*

BASED TO TOTAL
LDA POPULATION



* Among those who consume some type of alcohol at least every 2-3 months

**Examples given included port, sherry & vermouth

***Examples given included sangria & wine spritzers

WINE MARKET COUNCIL

“Other” Alcoholic Beverage Consumption Among U.S. Alcohol Consumers* – By Type & Segment

	Core Wine Drinker	Marginal Wine Drinker	Non-Adopter**
Wine-based drinks (such as sangria, wine spritzers, etc.)	47%	41%	19%
Fruit or flavored wine	40%	42%	21%
Hard seltzers	33%	22%	54%
Premixed, ready to drink cocktails	28%	19%	36%
Hard cider	26%	18%	28%
Fortified wine	19%	9%	8%
Hard Tea or Hard Kombucha	15%	8%	23%

* Consume some type of alcohol every 2-3months.

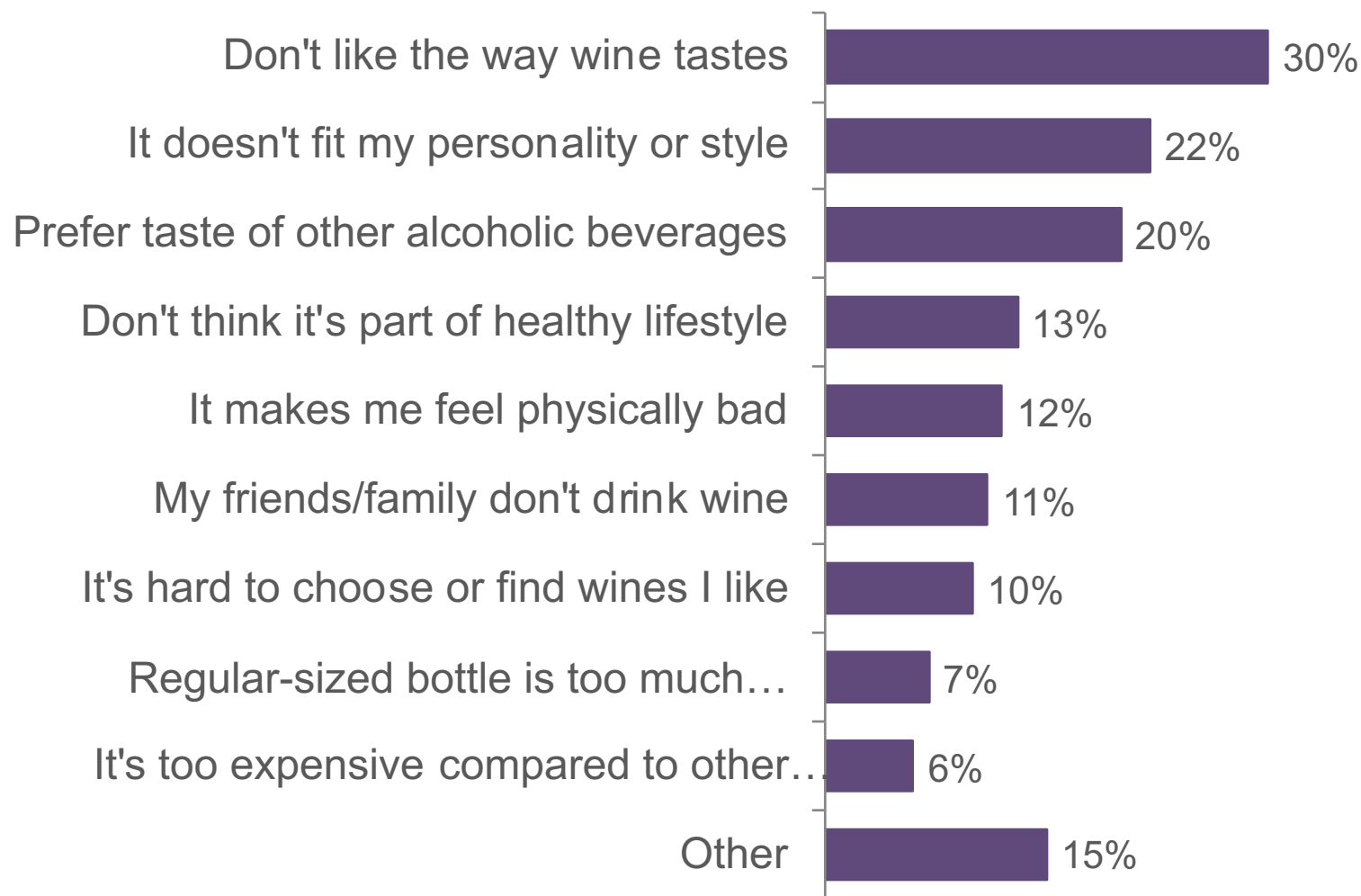
**Non-Adopter- Drinks Beer/Spirits/Other/No wine

Highlighting = Statistically higher than 2 or 1 other segment.

WINE MARKET COUNCIL

Base: Core wine drinkers (once a week or more), 991; Marginal wine drinkers (less than once a week but more than once every 2-3 months), n=700; Drink beer/spirits, no wine, n=1,699. Source: WMC – U.S. Wine Consumer Segmentation Survey, October-November 2021

Reasons for Not Drinking Wine...*



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Top Reasons Consumers Don't Drink Wine

- By Consumer Segment

	Non-Adopters*	Infrequent Alcohol**
Prefer taste of other types of alcohol	37%	19%
Don't like the way it tastes	32%	28%
Doesn't fit my personality or style	19%	18%
Hard to chose/find wines I might like	15%	15%
Friends and family don't drink wine	12%	10%
It makes me feel physically bad	11%	16%
Wine is too expensive vs. other types of alcohol	10%	6%
750 ml bottle is too much for typical drinking occasion	9%	15%
Don't think wine is part of a healthy lifestyle	5%	10%

*Non-Adopter- Drink beer/spirits/other alcohol/no wine

**Infrequent Alcohol- Drink alcohol less often than every 2-3 months

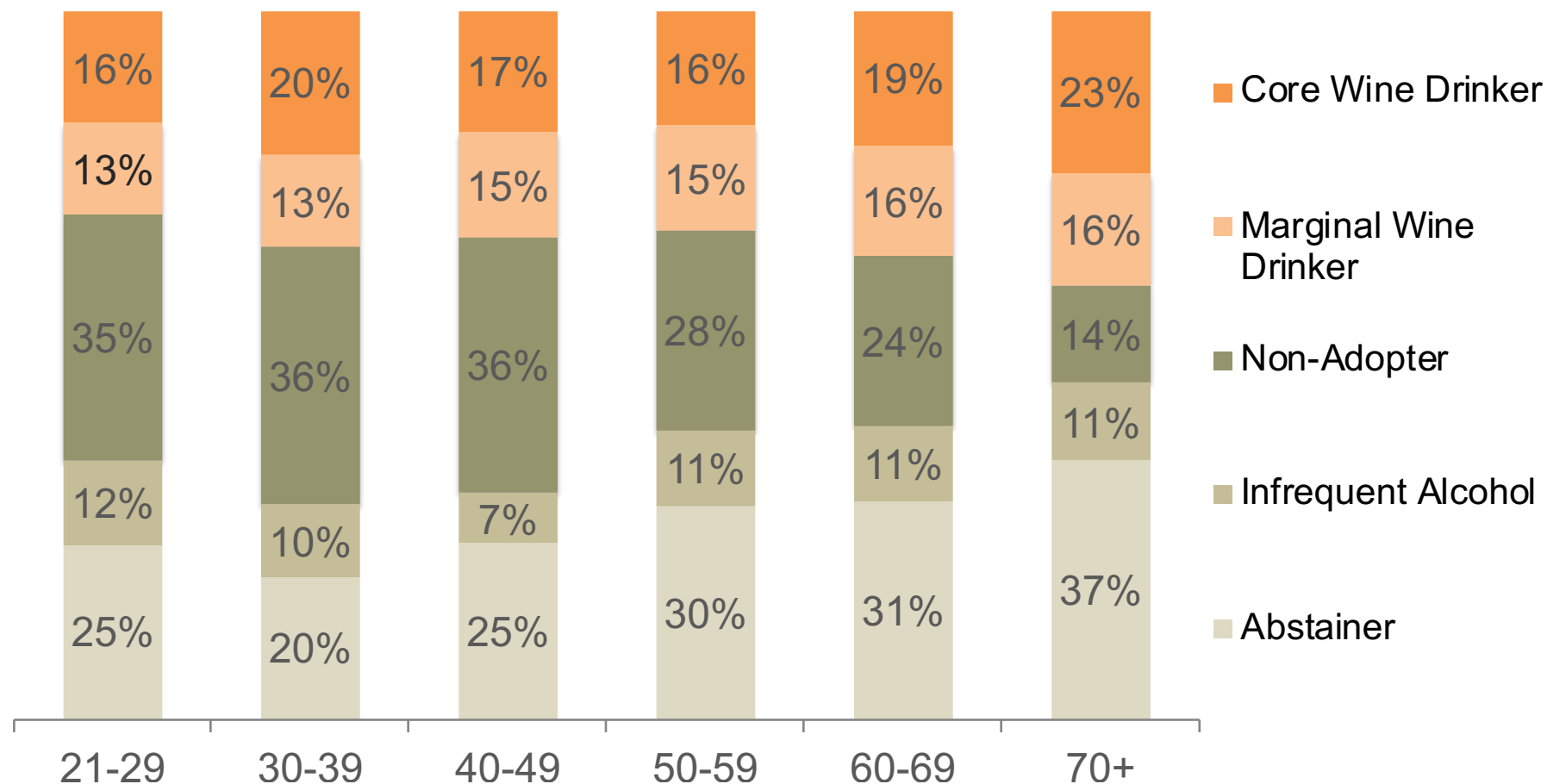
Highlighting = statistically higher than corresponding segment.

WINE MARKET COUNCIL

Base: Drink beer/spirits, no wine, n=1,699; drink alcohol less than once every 2-3 months, n=584

Source: WMC – U.S. Wine Consumer Segmentation Survey, October-November 2021

Beverage Alcohol Consumption Segment- by Age



Non-Adopter- Drink beer/spirits/other/no wine

Infrequent Alcohol- Drink alcohol less often than every 2-3 months

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Base: U.S Adults, 21+, n=7,569

Source: WMC – U.S. Wine Consumer Segmentation Survey, Fall 2021/Spring 2022 Combined

Alcohol Consumption Among U.S. Adults 21+ - By Age

	20's	30's	40's	50's	60's	70+
<u>Wine Drinkers</u>	<u>28%</u>	<u>33%</u>	<u>32%</u>	<u>32%</u>	<u>34%</u>	<u>38%</u>
Core Wine Drinker (once/week or more often)	16%	20%	17%	16%	19%	23%
Marginal Wine Drinker (Less than once a week, but more than once every 2-3 months)	13%	13%	15%	15%	16%	16%
Non-Adopter (drinks beer and/or spirits and/or other alcohol only)	35%	36%	36%	28%	24%	14%
Infrequent Alcohol Consumer (drink any/all alcohol less often than every 2-3 months)	12%	10%	7%	11%	11%	11%
Abstainer	25%	20%	25%	30%	31%	37%

May not add to 100% due to rounding

Highlighting = Statistically significantly higher than 3, 2, 1, other segments.

WINE MARKET COUNCIL

Base: U.S. Adults 21+: 21-29, n=1,100; 30-39, n=1,495; 40-49, n=1,255; 50-59, n=1,294; 60-69, n=1,446; 70+, n=979. Source: WMC
- U.S. Wine Consumer Segmentation Survey, Fall 2021/Spring 2022 Combined

Alcohol Consumption Among U.S. Adults 21+ - By Gender

	Male	Female
<u>Wine Drinkers</u>	<u>28%</u>	<u>38%</u>
Core Wine Drinker (once a week or more often)	17%	20%
Marginal Wine Drinker (Less often than once a week but more than once every 2-3 months)	11%	18%
Non-Adopter (drinks beer and/or spirits and/or other alcohol only)	38%	21%
Infrequent Alcohol Consumer (drink any/all alcohol less often than every 2-3 months)	9%	12%
Abstainer	25%	30%

May not add to 100% due to rounding

Highlighting= Statistically significantly higher than **corresponding segment**

WINE MARKET COUNCIL

Alcohol Consumption Among U.S. Adults 21+ - By Ethnicity

	Non-Hispanic White	Hispanic*	Black	Asian American
<u>Wine Drinkers</u>	<u>35%</u>	<u>26%</u>	<u>32%</u>	<u>36%</u>
Core Wine Drinker (once a week or more often)	20%	15%	15%	18%
Marginal Wine Drinker (Less often than once a week but more than once every 2-3 months)	15%	11%	17%	18%
Non-Adopter (drinks beer, spirits/other alcohol but no wine)	29%	39%	27%	17%
Infrequent Alcohol Consumer (drink any/all alcohol less often than every 2-3 months)	10%	11%	13%	12%
Abstainer	27%	25%	28%	35%

May not add to 100% due to rounding

Highlighting = Statistically significantly higher than 3, 2, 1, segments.

*Adjusted for unrepresented Spanish dominant segment, per WMC EthniFacts 2022 report (see page 6)

WINE MARKET COUNCIL

Base: U.S. Adults 21+: Non-White Hispanic; n=4,877; Hispanic; n=1,138, Black; n=884, Asian American; n=349;

Source: WMC – U.S. Wine Consumer Segmentation Survey, Fall 2021/Spring 2022 Combined

Wine Affinity Among U.S. Adults 21+ - By Wine Consumption Frequency

	Core wine drinkers	Marginal wine drinkers
I prefer wine , and drink it more often than just for special occasions	64%	34%
I prefer wine , but tend to drink it <u>only on special occasions</u>	19%	33%
I prefer other alcoholic beverages, and drink them more often	17%	28%
I do not like wine all that much, but drink it occasionally	1%	5%
I really do not like wine	<1%	<1%
I haven't had enough experience with wine to have an opinion	1%	1%

*Non-Adopter- Drinks beer/spirits/other/no wine

Highlighting = Statistically higher than 2 or 1 other segment

WINE MARKET COUNCIL

Base: Core wine drinkers (once a week +), n=991; Marginal wine drinkers (less often than once a week but at least every 2-3 mths), n=700; Drink Beer/Spirits/Other Alcohol/No Wine, n=1,699 Source: WMC – U.S. Wine Consumer Segmentation Survey, October-November 2021

Attitudes Toward Wine Among Wine Drinkers

- By Age

Wine Drinkers	20's	30's	40's	50's	60's	70+*
I prefer wine to other alcoholic beverages, and drink it more often than just for special occasions	37%	47%	42%	56%	48%	61%
I prefer wine to other alcoholic beverages, but tend to drink it only for special occasions or when celebrating	30%	29%	29%	19%	17%	18%
I prefer other alcoholic beverage(s) to wine, and drink them more often	25%	19%	26%	21%	31%	18%
I do not like wine all that much but drink it occasionally	5%	3%	2%	3%	3%	4%
I really do not like wine	<1%	--	--	--	<1%	--
I don't have enough experience with wine to have an opinion	1%	<1%	1%	1%	<1%	--

May not add to 100% due to rounding

Highlighting = Statistically significantly higher than 3, 2, 1, other segments.

WINE MARKET COUNCIL

Base: U.S. Wine Drinkers: 21-29, n=205; 30-39, n=360; 40-49, n=274; 50-59, n=296; 60-69, n=358; 70+, n=279.

Source: WMC – U.S. Wine Consumer Segmentation Survey, October-November 2021

Attitudes Toward Wine Among Wine Drinkers

- By Gender

Wine Drinkers	Male	Female
I prefer wine to other alcoholic beverages, and drink it more often than just for special occasions	42%	54%
I prefer wine to other alcoholic beverages, but tend to drink it only for special occasions or when celebrating	23%	23%
I prefer other alcoholic beverages(s) to wine, and drink them more often	30%	19%
I do not like wine all that much but drink it occasionally	4%	3%
I really do not like wine	<1%	--
I haven't had enough experience with wine to have an opinion	<1%	<1%

Highlighting = Statistically significantly higher than **corresponding** segment.

WINE MARKET COUNCIL

Base: U.S. Wine Drinkers: Males, n=714; Females, n=1058

Source: WMC – U.S. Wine Consumer Segmentation Survey, October-November 2021

Attitudes Toward Wine Among Wine Drinkers

- By Ethnicity

Wine Drinkers	Non-Hispanic White	Hispanic	Black	Asian American*
I prefer wine to other alcoholic beverages and drink it more often than just for special occasions	52%	43%	43%	49%
I prefer wine to other alcoholic beverages, but tend to drink it only for special occasions or when celebrating	22%	29%	30%	20%
I prefer other alcoholic beverage(s) to wine, and drink them more often	23%	24%	21%	32%
I do not like wine all that much but drink it occasionally	3%	3%	4%	1%
I really do not like wine	<1%	<1%	--	--
I don't have enough experience with wine to have an opinion	<1%	<1%	1%	--

May not add to 100% due to rounding

Highlighting = Statistically significantly higher than 3, 2, 1 other segments.

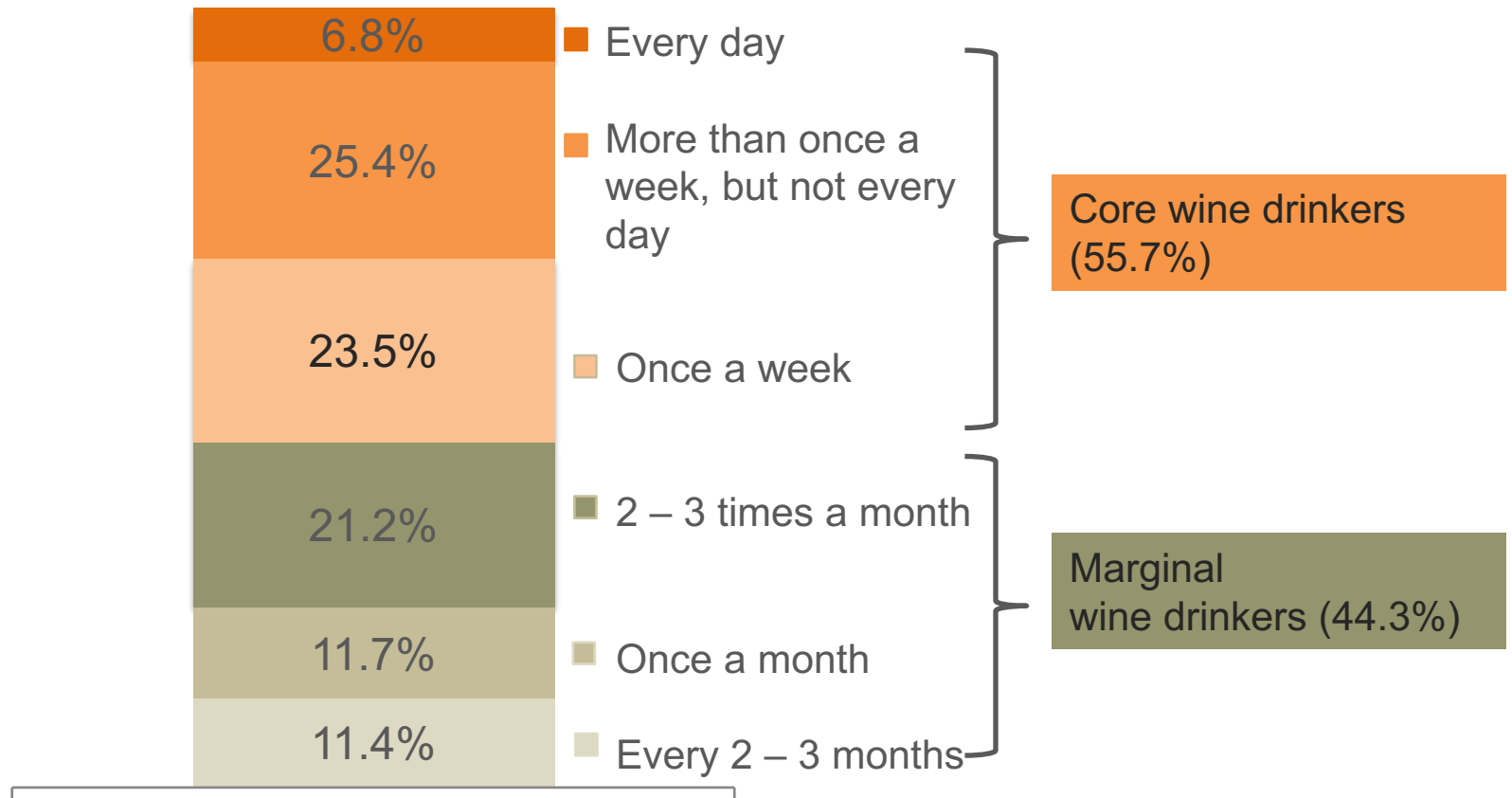
*Caution: Small base size

WINE MARKET COUNCIL

Frequency of Consumption Among Wine Drinkers

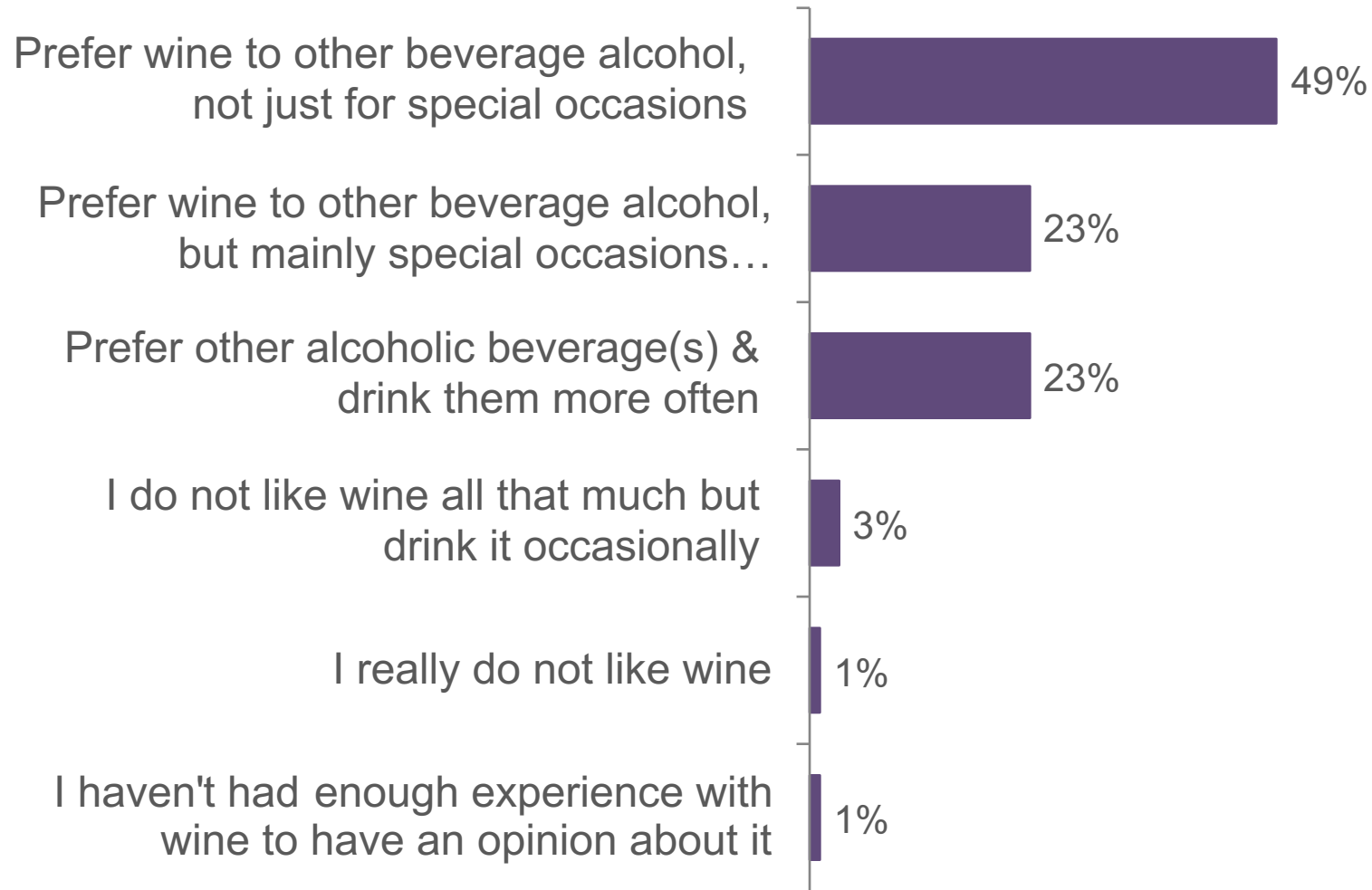


Wine Consumption Frequency Among Total Wine Drinkers



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Attitudes Toward Wine Among Wine Drinkers



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Weekly+ Consumption By Alcohol Category Among All Wine Drinkers - By Age

% of Wine Drinkers who drink weekly or more often...	20's	30's	40's	50's	60's	70+
Wine	55%	60%	55%	51%	54%	60%
Beer	67%	68%	63%	55%	58%	51%
Spirits	48%	56%	53%	46%	50%	49%
Other Alcohol	38%	49%	56%	27%	34%	28%

May not add to 100% due to rounding

Highlighting = Statistically significantly higher than

3,	2,	1
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other segments

WINE MARKET COUNCIL

Base: U.S. Wine Drinkers; n=2,486: 21-29, n=309; 30-39, n=498; 40-49, n=400; 50-59, n=407; 60-69, n=268; 70+, n=223.

Source: WMC – U.S. Wine Consumer Segmentation Survey, Fall 2021/Spring 2022 Combined

Weekly+ Consumption by Alcohol Category Among All Wine Drinkers - By Gender, Ethnicity

% of Wine Drinkers who drink weekly or more often...	Male	Female	Non-Hispanic White	Hispanic*	Black	Asian American**
Wine	61%	52%	58%	57%*	48%	50%
Beer	71%	49%	61%	56%	58%	59%
Spirits	62%	42%	52%	51%	52%	40%
Other Types of Alcohol	52%	35%	43%	42%	41%	33%

*Adjusted for unrepresented Spanish dominant segment, per WMC EthniFacts 2022 report (See page 6)

**Caution: small base size

Highlighting= Statistically significantly higher than corresponding segment

Highlighting = Statistically significantly higher than 3, 2, 1 other segments.

WINE MARKET COUNCIL

Base: U.S. Wine Drinkers; n=2,486: Males; n=1,012; Females; n=1,472; White/Non-Hispanic; n=1,704; Hispanic; n=290; Black; n=208; Asian American; n=126; Source: WMC – U.S. Wine Consumer Segmentation Survey, Fall 21/Spring 22 Combined

Interaction of Wine & Other Categories



Consumption of Other Alcohol Categories

Among Wine Drinkers...

57%

Also drink beer

59%

Also drink spirits

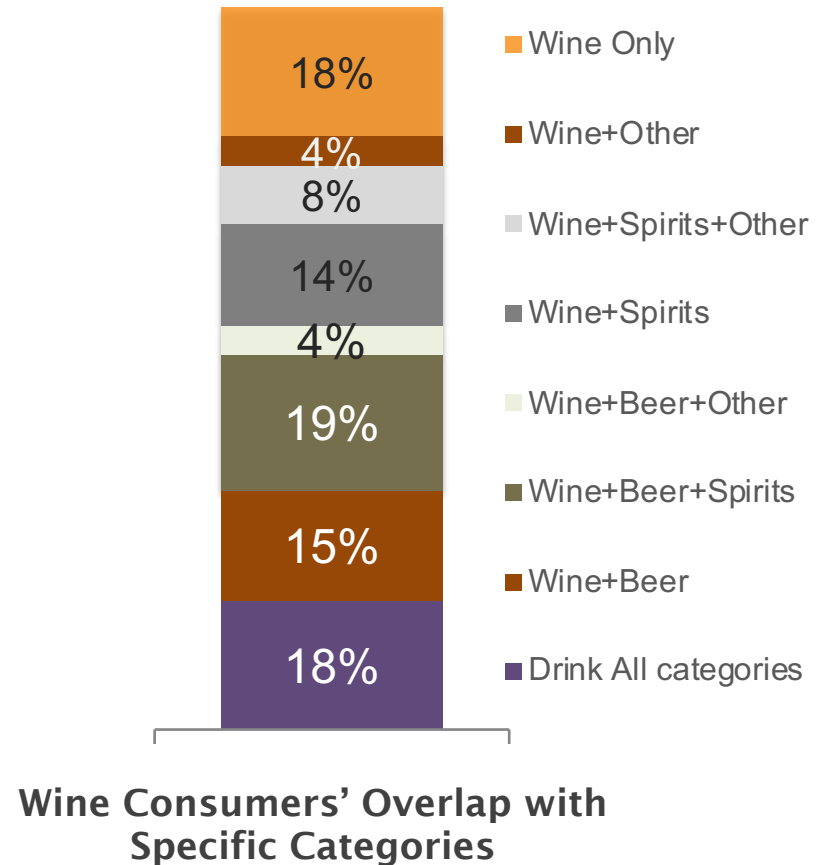
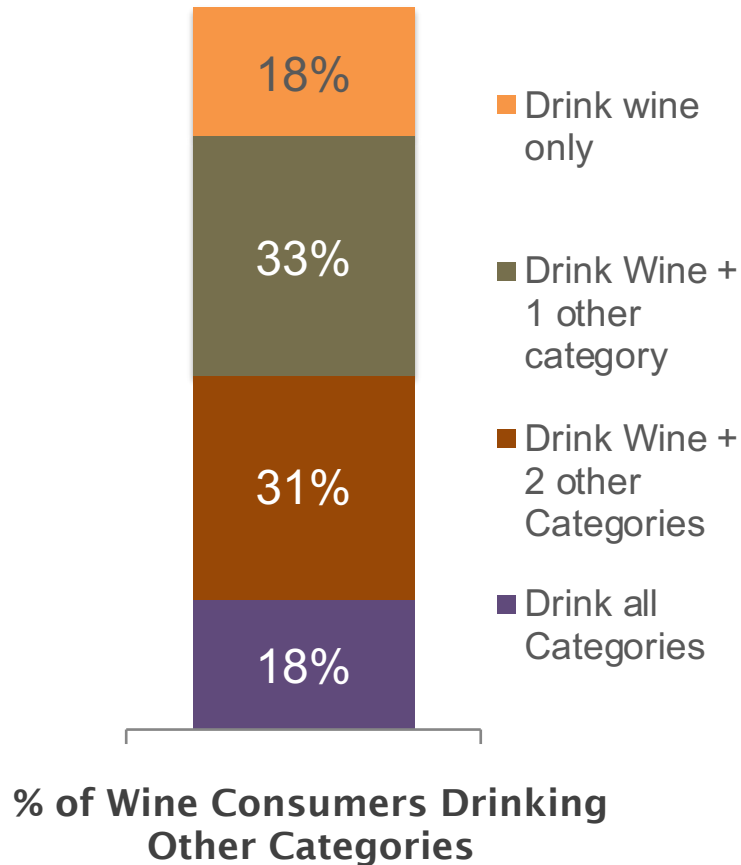
34%

Also drink other types
of alcoholic beverages

Includes:	% Wine Drinkers
Wine-based drinks	15%
Fruit/fruit-flavored wine	13%
Hard Seltzers	10%
Premixed/RTD	8%
Cider.	8%
Hard tea/kombucha	4%
Fortified wines	5%

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Consumption* Category Overlap Among Wine Drinkers



*Consume alcohol at least every 2 – 3 months

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Category Crossover* Among Wine Drinkers

- By Age

	20's	30 's	40's	50 's	60 's	70+
Drink wine only	14%	14%	14%	18%	21%	29%
Drink wine + one other category	28%	29%	30%	31%	39%	37%
Drink wine + two other categories	33%	30%	32%	36%	28%	29%
Drink all four categories	25%	28%	24%	15%	12%	5%

*Consume alcohol at least every 2 – 3 months May not add to 100% due to rounding
Alcohol categories include wine, beer, spirits, other alcoholic beverages

Highlighting = Statistically significantly higher than 5,4, 3,2, 1 other segments

WINE MARKET COUNCIL

Base: U.S. wine drinkers: 21-29, n= 309; 30-39, n= 498; 40-49, n=400; 50-59, n=407; 60-69, n=498; 70+, n=375

Source: WMC – U.S. Wine Consumer Segmentation Survey, Fall 2021/Spring 2022 Combined

Category Crossover* Among Wine Drinkers

– By Gender & Ethnicity

	Male	Female	Non Hispanic White	Hispanic	Black	Asian American**
Drink wine only	11%	23%	17%	17%	27%	18%
Drink wine + one other category	29%	35%	33%	28%	33%	33%
Drink wine + two other categories	37%	27%	32%	33%	27%	29%
Drink all four categories	22%	15%	18%	23%	13%	20%

*Consume alcohol at least every 2 – 3 months **Caution: Small base size

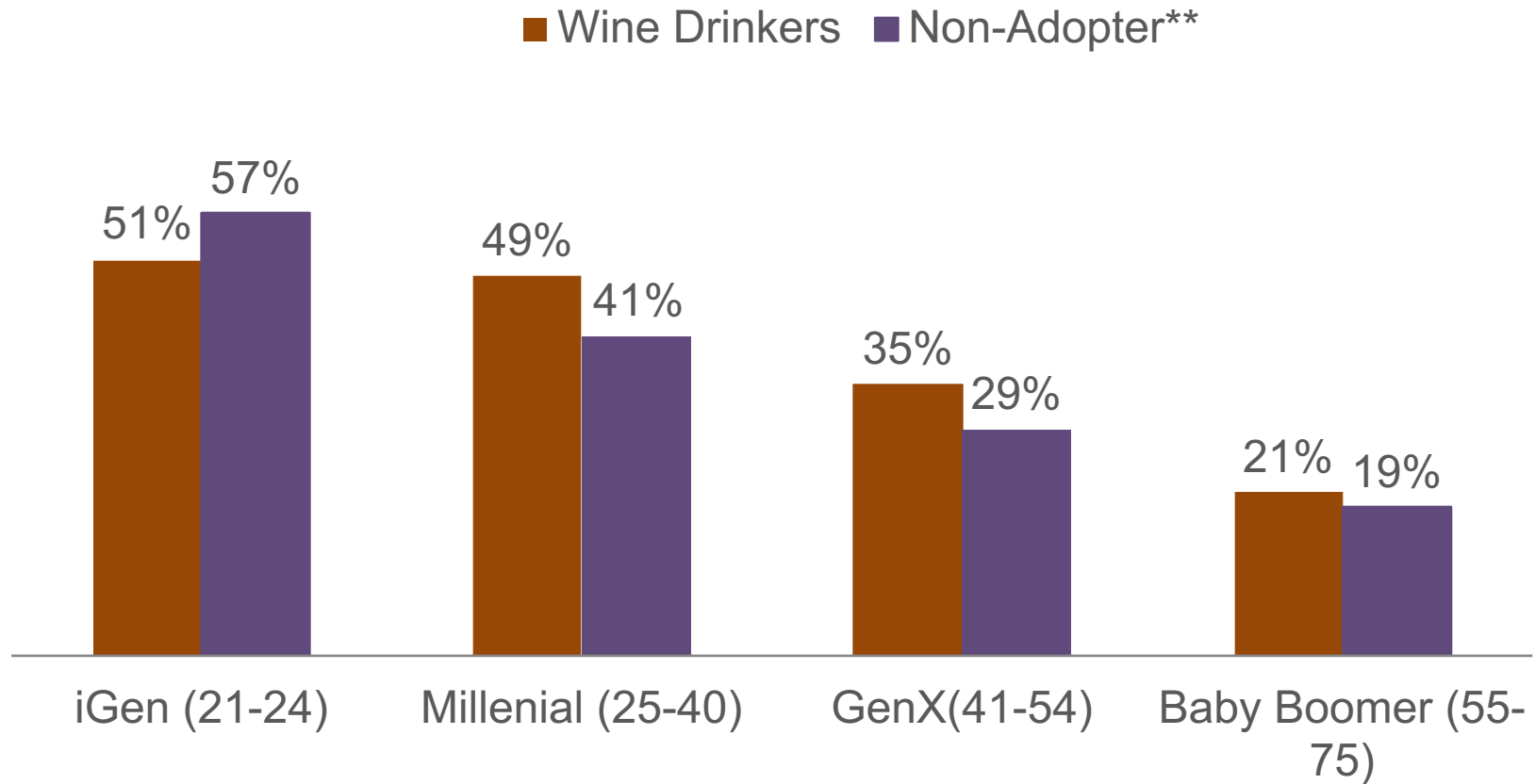
May not add to 100% due to rounding

Highlighting = Statistically significantly higher than corresponding segment

Highlighting = Statistically significantly higher than 1 other segments.

WINE MARKET COUNCIL

Consumption of “Other Alcoholic Beverages”^{*} Among Wine Drinkers and Non-Adopters - By Generation

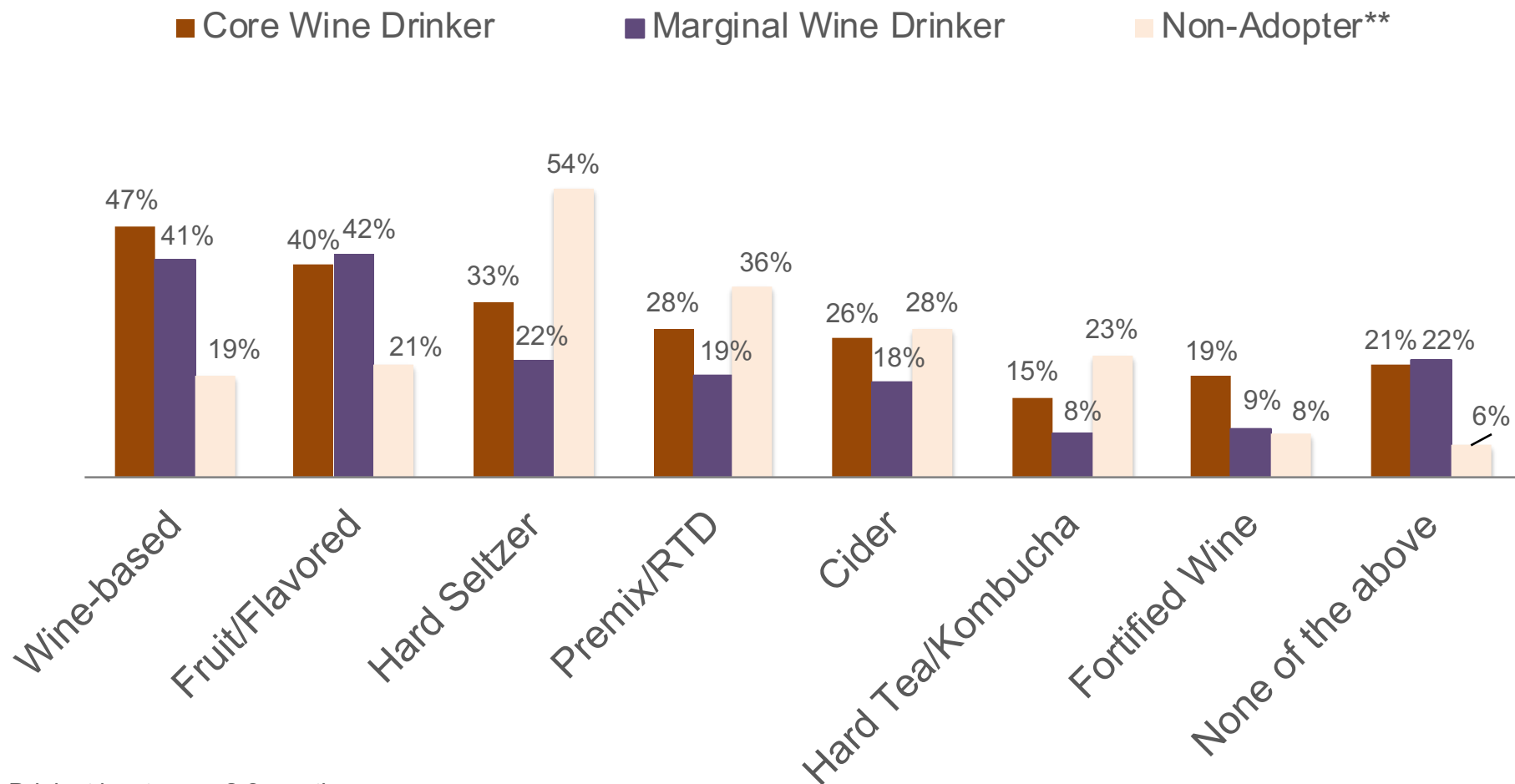


^{*}Such as such as hard spritzers, flavored alcoholic beverages, hard cider, wine-based mixed beverages, at Least every 2-3 months

^{**}Non-Adopter- Drinks beer, spirits, other alcohol but no wine

WINE MARKET COUNCIL

Consumption of “Other Alcoholic Beverages”* Among Wine Drinkers and Non-Adopters- By Type



* Drink at least every 2-3 months

**Non-Adopter- Drinks beer/spirits/other alcohol/no wine

WINE MARKET COUNCIL

Base: Core Wine drinkers, n=991; Marginal wine drinkers, n=700; Beer/Spirits/Other Alcohol/No Wine drinkers, n=1,699

Source: WMC – U.S. Wine Consumer Segmentation Survey, October-November 2021

Frequency of Consumption Among Wine Drinkers - by Drink Type

	Daily	More than 1x Week	Weekly	2-3 x Month	Once a Month	Every 2-3 Months
Core Wine Consumers						
Wine	12%	46%	42%	-	-	-
Beer	9%	40%	27%	15%	7%	3%
Spirits	7%	27%	32%	22%	9%	4%
Other Alcohol	7%	25%	24%	30%	7%	7%
Marginal Wine Consumers						
Wine	-	-	-	48%	26%	26%
Beer	5%	14%	19%	31%	18%	12%
Spirits	4%	13%	13%	28%	22%	21%
Other Alcohol	1%	7%	14%	37%	18%	23%

May not add to 100% due to rounding

WINE MARKET COUNCIL

Base: Total U.S. wine drinkers; n=2,486

Source: WMC – U.S. Wine Consumer Segmentation Survey, Fall 2021/Spring 2022 Combined

High End Wine Consumers



Profile of High-End Wine Consumers vs. Others

	HIGH END (High Frequency + Purchase \$20+ Monthly or more often)	High Frequency, not High End	All Other Wine Drinkers
% with \$150k+ HHI	28%	19%	17%
Purchase <\$10 monthly+	66%	58%	28%
Purchase \$20+ monthly+	100%*	0%*	14%
Purchase \$50+ monthly+	38%	0%*	3%
% Male	60%	39%	38%
% Non-Hispanic White	70%	78%	65%
% Under 40	48%	22%	33%
% 60+	17%	49%	34%
% with Children <18	65%	25%	34%
% Retired	10%	35%	22%
% with Post Grad Degree	31%	25%	20%
Buy directly from wineries (ever)*	80%	48%	43%
Buy from small wine stores* specializing in wine, monthly+	59%	17%	12%

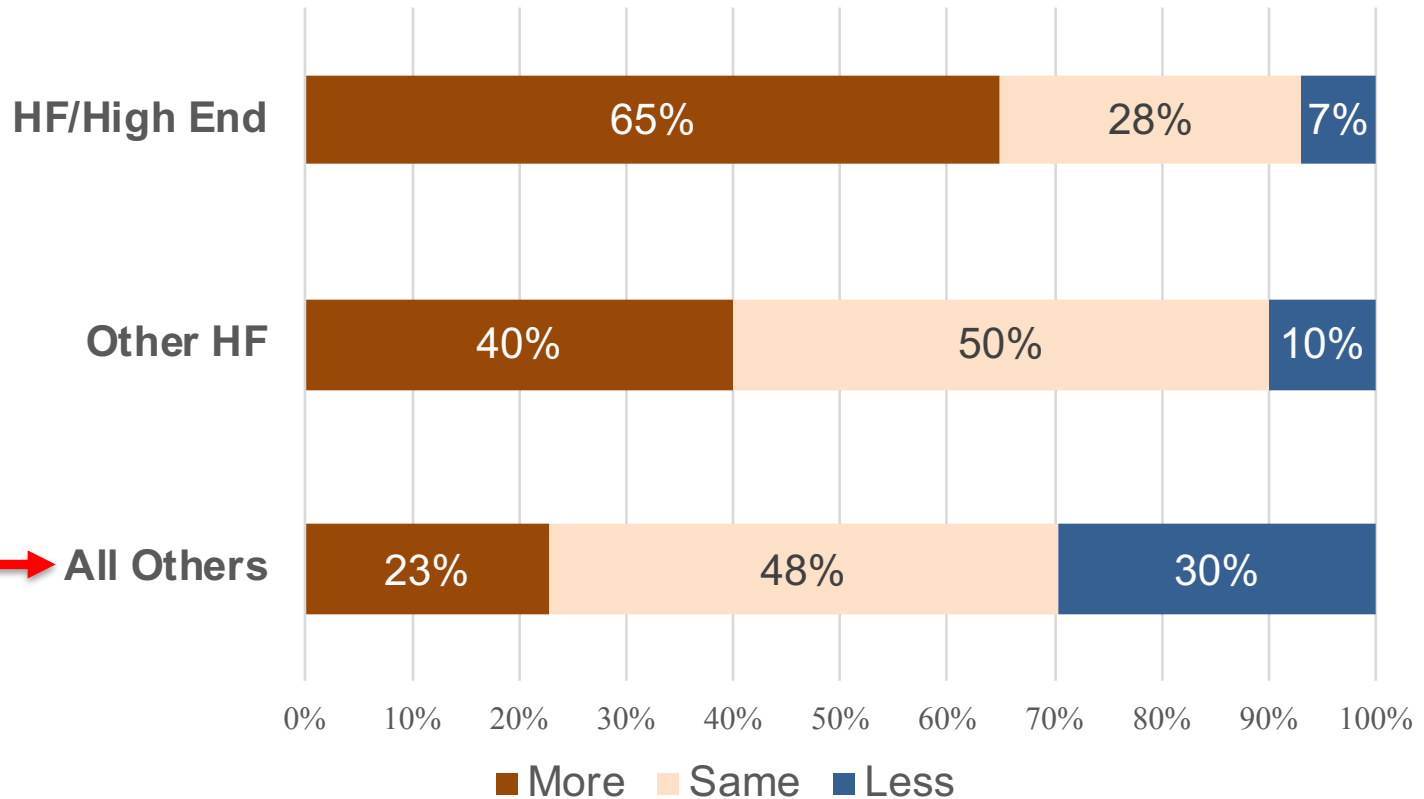
Highlighting = Statistically significantly higher than 3 2 1 other segments *Not asked in 2022 waves

WINE MARKET COUNCIL

Base: U.S. Wine Drinkers; n=2,486; High-End wine drinkers, n=293, High Frequency (not high-end) n=507; All Other wine drinkers, n=1,686.

Source: U.S. Wine Consumer Segmentation Survey, Fall 2021/Spring 2022 Combined. Wine purchase channel not asked in Spring waves.

Change in Wine Consumption vs. “A Couple of Years Ago” Among High Frequency/High End Wine Drinkers*



NOTE: About 1/5 of Marginal Wine Drinkers dropped out of category since 2019.

*High Frequency High End – Drinks wine weekly+ and purchases \$20+ 750ml wine monthly+
High Frequency- Drinks wine weekly+ but does not purchase \$20+ 750ml wine monthly+

WINE MARKET COUNCIL

Regular* Shopping by Channel: High End Consumers vs. Others

Channel	HIGH END (High Frequency + Purchase \$20+ Monthly or more often)	High Frequency, not High End	All Other Wine Drinkers
Supermarket/Grocery	65%	58%	30%
Large Liquor/Wine Store or Chain	58%	20%	15%
Mass Merchandiser	63%	33%	21%
Small Wine Store/Specialist	56%	15%	11%
Warehouse/Club Store	48%	18%	12%
Convenience Store	43%	11%	7%
Direct From Winery**	36%	7%	6%
Drugstore	36%	12%	8%
Virtual (online only) Retailer	41%	6%	7%
Delivery App	46%	5%	5%

*More often than "several times a year"

**Respondents may be including tasting room or website purchases or club shipments in this category

WINE MARKET COUNCIL

Self-Reported Wine Purchases by Price, Package & Location



Wine Purchase Frequency Among Total Wine Drinkers - By Price Category

	Weekly	Monthly	Several times a year	Once a year or less	Never
Under \$10	16%	23%	23%	13%	25%
\$10 - \$19.99	14%	35%	43%	25%	20%
\$20 - \$29.99	5%	13%	23%	27%	32%
\$30 - \$49.99	3%	7%	15%	22%	53%
\$50+	2%	4%	9%	19%	65%

Some rows do not add to 100% due to rounding.

WINE MARKET COUNCIL

Wine Drinkers: % Purchasing Wine Monthly+, Price Category by Age

	20's	30's	40's	50's	60's	70+
Under \$10	47%	51%	43%	30%	28%	34%
\$10 - \$19.99	50%	55%	50%	41%	37%	36%
\$20+	30%	35%	29%	17%	11%	6%
\$30+	18%	21%	20%	5%	3%	2%
\$50+	12%	13%	13%	1%	1%	1%

Some rows do not add to 100% due to rounding.

NOTE: younger consumers generally shop more frequently but hold lower pantry inventories

Highlighting = Statistically significantly higher than 3, 2, 1 other segment

WINE MARKET COUNCIL

Wine Drinkers: % Purchasing Wine Monthly+ by Price Category vs. Gender, Ethnicity

Price per 750ml	Male	Female	White	Hispanic*	Black	Asian American**
Under \$10	43%	35%	38%	49%	37%	33%
\$10 - \$19.99	48%	43%	45%	51%	45%	38%
\$20+	31%	15%	21%	18%	16%	16%
\$30+	18%	6%	10%	7%	9%	5%
\$50+	12%	3%	7%	3%	4%	2%

* Data weighted to correct sampling skew **Caution: small base size Some rows do not add to 100% due to rounding.

Highlighting = Statistically significantly higher than corresponding segment

Highlighting = Statistically significantly higher than 3, 2, 1 other segment

WINE MARKET COUNCIL

Monthly + Package Type Purchase – By Wine Drinker Segment

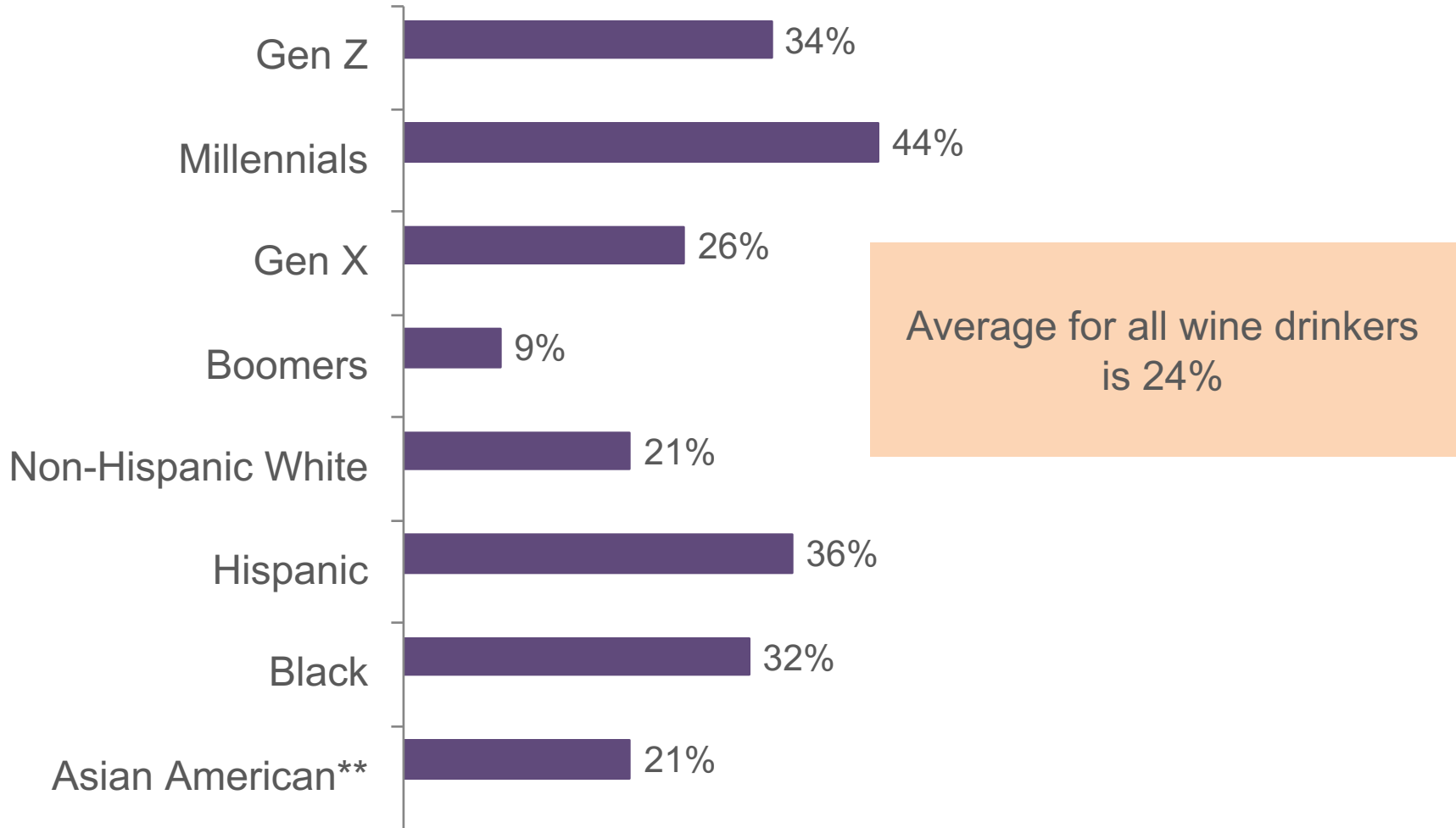
	Purchase Monthly+		Never Purchase	
Package Type	Core	Marginal	Core	Marginal
187ml bottle(s)	24%	9%	49%	61%
375ml bottle	21%	5%	51%	65%
750ml bottle	73%	29%	4%	5%
1.5 liter bottle or magnum	23%	5%	43%	64%
3 liter or bigger bottle/jug	13%	3%	64%	80%
1.5/3 liter box	16%	4%	55%	76%
5 liter box	12%	2%	65%	82%
Tetra Pak	10%	2%	76%	89%
Can	16%	4%	63%	77%

Highlighting = Statistically significantly higher than **corresponding** segment

WINE MARKET COUNCIL

Monthly+ Purchase Rates for Smaller Packages*

- By Generation, Ethnicity



*Any package smaller than 750ml, including Tetra Pak and cans

**Caution: small base size

WINE MARKET COUNCIL

Wine Consumers: Past 12 Months Consumption of Wine Types

	Drank Regularly	Drank Occasionally	Drank Rarely or Never
Red Varieties	55%	34%	11%
White Varieties	53%	36%	11%
Sparkling	31%	43%	26%
Rosé/Blush/Pink	22%	37%	42%

May not add to 100% due to rounding.

Wine Consumers: Past 12 Months Consumption of Red Wine Varieties

	Drank Regularly	Drank Occasionally	Drank Rarely or Never
Cabernet Sauvignon	25%	33%	41%
Merlot	25%	37%	38%
Pinot Noir	22%	37%	41%
Red Blends	22%	36%	42%
Zinfandel	16%	36%	49%
Malbec	13%	24%	63%
Syrah/Shiraz	10%	23%	67%
Tempranillo	5%	15%	80%
Garnacha/Grenache	5%	13%	81%

May not add to 100% due to rounding.

Wine Consumers: Past 12 months Consumption of White and Rosé Varieties/Types

	Drank Regularly	Drank Occasionally	Drank Rarely or Never
Chardonnay	24%	35%	42%
Pinot Grigio/Gris	19%	36%	45%
Moscato/Muscat	18%	28%	54%
Sauvignon Blanc/Fume Blanc	16%	29%	55%
White Blends	14%	32%	54%
Dry Rosé/Pink	14%	32%	55%
Off Dry/Sweet Rosé/Blush/White Zinfandel	13%	32%	55%
Riesling	12%	31%	57%

May not add to 100% due to rounding.

Wine Consumers: Past 12 Months Consumption of Sparkling Types

	Drank Regularly	Drank Occasionally	Drank Rarely or Never
Sparkling Moscato/Muscat	13%	28%	59%
Sparkling Rosé/Pink	11%	32%	57%
Domestic Sparkling	11%	33%	56%
Prosecco	11%	31%	59%
French Champagne	8%	27%	65%
Cava	5%	14%	82%

May not add to 100% due to rounding

WINE MARKET COUNCIL

Base: U.S. wine drinkers, n=1,772

Source: WMC – U.S. Wine Consumer Segmentation Survey, October-November 2021

Wine Consumers: Past 12 Months Imported Wine Consumption - By Country

	Drank Regularly	Drank Occasionally	Drank Rarely or Never
Italy	23%	47%	30%
France	19%	45%	36%
Spain	11%	37%	52%
Argentina	9%	27%	64%
Australia	9%	31%	61%
New Zealand	8%	25%	67%
Germany	7%	28%	66%
Chile	6%	27%	67%
Portugal	6%	24%	70%
Greece	5%	17%	78%
South Africa	4%	18%	78%
Austria	4%	16%	81%

May not add to 100% due to rounding

WINE MARKET COUNCIL

Base: U.S. wine drinkers, n=1,772

Source: WMC – U.S. Wine Consumer Segmentation Survey, October-November 2021

Wine Consumers: Past 12 Months Domestic Wine Consumption - By State

	Drank Regularly	Drank Occasionally	Drank Rarely or Never
California	46%	40%	14%
Washington	12%	29%	59%
Oregon	9%	27%	63%
New York	9%	28%	63%
Texas	8%	17%	76%
Virginia	6%	16%	78%
Michigan	5%	17%	78%
Missouri	4%	12%	83%

May not add to 100% due to rounding.

Wine Shopping Frequency Among Wine Drinkers - By Venue

Channel	Weekly+ / A Few Times a Month	Several Times a Year/ Less Often	Don't Buy Wine Here
Supermarket/Grocery	34%	46%	20%
Large Liquor/Wine Store or Chain	24%	46%	31%
Mass Merchandiser	24%	36%	40%
Small Wine Store/Specialist	19%	38%	44%
Warehouse/Club Store	16%	41%	43%
Convenience Store	12%	22%	67%
Direct From Winery	10%	39%	51%
Drugstore	10%	21%	69%
Virtual (online only) Retailer	10%	19%	71%
Delivery App	9%	15%	76%

May not add to 100% due to rounding.

WINE MARKET COUNCIL

Base: U.S. wine drinkers, n=1,772

Source: WMC – U.S. Wine Consumer Segmentation Survey, October-November 2021

Winery Visitation



Past and Planned Winery Visitation* Among Wine Drinkers

	Visited in Past	Plan to Visit in Next 1-2 Years	Haven't Visited & No Plans
Wineries in California	31%	25%	51%
Wineries in Washington	12%	15%	75%
Wineries in Oregon	10%	15%	77%
Wineries in Other Countries	18%	19%	66%
Wineries in Other States	26%	13%	67%

*Question allowed multiple responses for past and future visitation

WINE MARKET COUNCIL

Intent to Visit Wine Country – Wine Drinkers By Age & Segment

	Plan to visit wineries in next 1-2 years in...			
Consumer Type	California	Oregon	WA	Other States
Gen Z	46%	18%	39%	20%
Millennial	34%	25%	26%	13%
Gen X	27%	16%	13%	14%
Boomer	15%	7%	6%	12%
High End	36%	36%	34%	11%
Core	30%	20%	20%	14%
Marginal	20%	10%	9%	11%
Non-Adopter*	21%	11%	11%	13%

May not add to 100% due to rounding

*Non-Adopter = drink beer, spirits or other alcohol but not or rarely wine

WINE MARKET COUNCIL

Base: U.S. Wine drinkers, n=1,772.

Source: WMC – U.S. Wine Consumer Segmentation Survey, October-November 2022

Wine Country Visitation Experience – Wine Drinkers By Ethnicity

	Ethnicity (self-identified)			
Visitation Status	White	Hispanic	Black	Asian
Visited in the Past				
California	32%	30%*	17%	51%*
Oregon/Washington (avg)	12%	15%	5%	7%*
Other states	29%	13%	19%	16%
Plan to Visit Next 2 Years				
California	22%	31%*	31%	41%*
Oregon/Washington (avg)	14%	17%	15%	29%*
Other states	13%	14%	12%	11%

May not add to 100% due to rounding

*ethnic population over-indexes in state

WINE MARKET COUNCIL

Base: U.S. Wine drinkers, n=1,772.

Source: WMC – U.S. Wine Consumer Segmentation Survey, October-November 2022

Have Visited and/or Plan to Visit: High End Consumers vs. Others

Wine Region	HIGH END (High Frequency + Purchase \$20+ Monthly or more often)	High Frequency, not High End	All Other Wine Drinkers
California	69%	61%	42%
Oregon	54%	24%	17%
Washington	58%	26%	19%
Other States*	30%	39%	32%
Other Countries*	55%	38%	29%

*Verbatim – “Wineries in other states” & “Wineries in other countries”; none specified in question

Note: for comparison, the % of respondents who are resident in each state
– California 11%, Oregon/Washington 4%, All other states 85%.

WINE MARKET COUNCIL

Demographic Profiles by Consumer Drinking Segment



Consumer Segments, by Age and Gender

% Who Are...	Total Wine Drinkers (n=2,486)	Drink Beer/Spirits/Other/ No Wine (n=2,217)	Infrequent Alcohol/ Abstainers (n=2,178)	Core Wine Drinker (n=1,384)	Marginal Wine Drinker (n=1,103)	High-End Wine Drinker (n=293)
Average Age	50	45	51	50	50	43
21-29	12%	17%	14%	12%	13%	15%
30-39	20%	24%	16%	21%	18%	33%
40-49	16%	20%	14%	16%	17%	23%
50-59	16%	16%	18%	15%	18%	13%
60-69	20%	16%	21%	19%	21%	12%
70+	15%	6%	16%	16%	14%	5%
iGeneration (21-24)	5%	7%	7%	5%	6%	5%
Millennial (25-40)	30%	37%	24%	32%	28%	47%
Generation X (41-56)	24%	29%	25%	23%	26%	27%
Baby Boomer (57-75)	36%	25%	37%	35%	37%	20%
Older (76+)	5%	2%	6%	6%	4%	1%
Male	41%	62%	43%	45%	36%	60%
Female	59%	38%	57%	55%	64%	40%

Highlighting = Statistically significantly higher than 2 or 1 segment

WINE MARKET COUNCIL

Consumer Segments, By Income, Employment, Marital Status, Kids

% Who Are...	Total Wine Drinkers (n=1,771)	Drink Beer/Spirits/Other/ No Wine (n=1,699)	Infrequent Alcohol/ Abstainers (n=2,178)	Core Wine Drinker (n=991)	Marginal Wine Drinker (n=700)	High-End Wine Drinker (n=200)
Annual HH Income (mean)	\$106.6k	\$87.3k	\$77.8k	\$112.5k	\$99.1k	\$126.9k
Own home	74%	61%	59%	77%	70%	85%
Rent home	23%	34%	32%	21%	25%	15%
Work full-time	50%	54%	33%	52%	47%	74%
Work part-time	8%	8%	9%	7%	9%	6%
Self-employed	7%	7%	7%	8%	5%	6%
Homemaker	6%	6%	9%	6%	6%	2%
Student	1%	2%	4%	1%	2%	1%
Retired	23%	14%	26%	23%	23%	10%
Not employed	4%	7%	12%	2%	6%	1%
Married/live w/partner	72%	65%	59%	75%	68%	81%
Single/never married	15%	21%	23%	13%	18%	14%
Separated/divorced/ widowed	13%	14%	18%	12%	14%	6%
Children < 18 in household	36%	39%	26%	39%	31%	65%

Highlighting = Statistically significantly higher than 2 or 1 segment

WINE MARKET COUNCIL

Consumer Segments, Other Demographics

% Who Are...	Total Wine Drinkers (n=2,486)	Drink Beer/Spirits/Other/ No Wine (n=2,217)	Infrequent Alcohol/ Abstainers (n=2,178)	Core Wine Drinker (n=1,384)	Marginal Wine Drinker (n=1,103)	High-End Wine Drinker (n=293)
High school grad/less	21%	43%	46%	18%	26%	12%
Some college	15%	18%	16%	15%	15%	13%
Technical/2-year degree	10%	10%	11%	9%	11%	6%
College graduate	28%	18%	15%	31%	24%	33%
Postgraduate work or degree	26%	12%	13%	27%	25%	36%
Non-Hispanic White	69%	63%	62%	71%	65%	75%
Hispanic	12%	20%	14%	12%	11%	9%**
Black	11%	11%	13%	10%	13%	11%
Asian American	5%	3%	6%	5%	6%	4%
Another designation	3%	3%	4%	2%	3%	1%
Live in a state in the...*						
South	35%	38%	40%	36%	35%	36%
West	25%	21%	24%	27%	23%	34%
Midwest	20%	23%	20%	18%	23%	12%
Northeast	20%	18%	15%	19%	20%	18%

Highlighting = Statistically significantly higher than 2 or 1 segment

Bold/italic = indexes >10% high/low vs. region's share of population

*US census regions **Data weighted to correct sampling skew

WINE MARKET COUNCIL

Changes in Consumption of Wine & Other Types of Alcohol Among Wine Drinkers since 2019



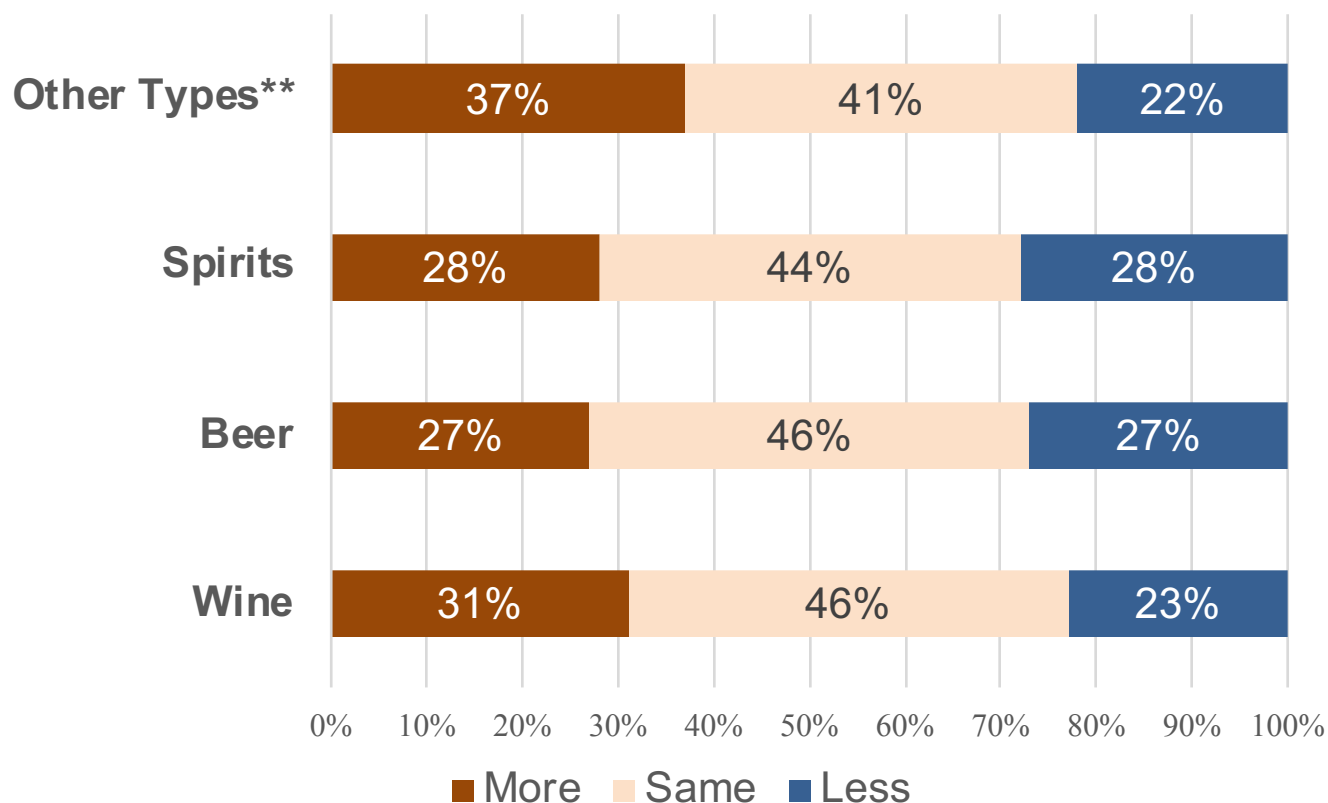
Wine Purchase Frequency Among Total Wine Drinkers by Price Category – 2021 vs. 2019

2021	Weekly	Monthly	Several times a year	Once a year or less	Never
Under \$10	16%	22%	23%	13%	27%
\$15 - \$20	8%	20%	31%	21%	20%
\$50+	2%	4%	10%	20%	64%
2019					
Under \$10	17%	21%	24%	13%	24%
\$15 - \$20	9%	17%	33%	20%	21%
\$50+	2%	4%	7%	14%	73%
Point Change					
Under \$10	-1	+1	-1	0	+3
\$15 - \$20	-1	+3	-2	+1	-1
\$50+	0	0	+3	+6	-9

Some rows do not add to 100% due to rounding.

WINE MARKET COUNCIL

Change in Consumption vs. “A Couple of Years Ago” Among Wine Drinkers -By Category



Net Change (% drinking more - % drinking less)	
Wine	+8*
Beer	Flat
Spirits	Flat
Other**	+15

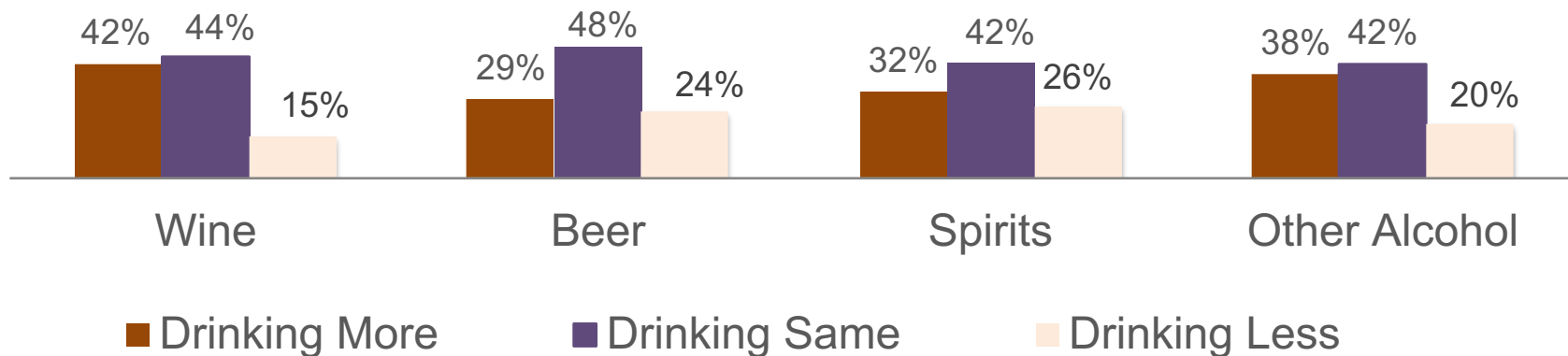
*Approximately 1/5 of Marginal Wine Drinkers switched to drinking mostly/all beer, spirits or other since 2019 survey. Therefore the % saying “less” for wine is understated by about 1/4; and “more” or “about the same” are also slightly understated for Beer, Spirits or Other.

**Such as such as hard spritzers, flavored alcoholic beverages, hard cider, wine-based mixed beverages

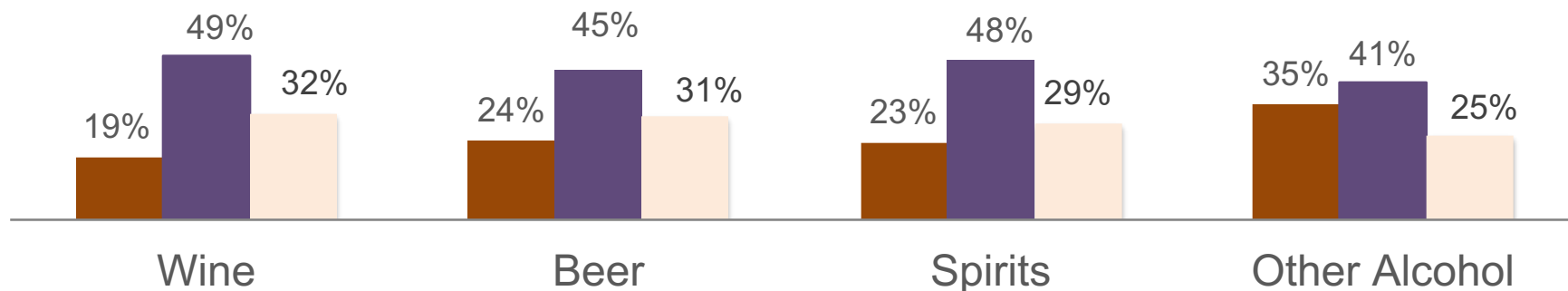
WINE MARKET COUNCIL

Change in Consumption vs. “A Couple of Years Ago” For Wine Drinkers – By Wine Drinker Segment

CORE



MARGINAL



NOTE: Substantial numbers of Marginal Wine Drinkers switched to drinking mostly/all beer, spirits or other since 2019 survey . Adjusting for this, our estimate is that More/Same/Less for Marginal wine consumers would be 15/39/46; and % drinking More in the other categories should be higher by 5-10%.

* % point difference between drinking more and drinking less

**Such as hard spritzers, flavored alcoholic beverages, hard cider, wine-based mixed beverages

WINE MARKET COUNCIL

Base: Core Wine drinkers, n=991; Marginal wine drinkers, n=700

Source: WMC – U.S. Wine Consumer Segmentation Survey, October-November 2021

Change in Wine Consumption vs. “A Couple of Years Ago” Among Wine Drinkers - By Age

NOTES: (1) Past WMC research has indicated that the majority of those in their early 20s who are “drinking more” wine, drank little or no wine a few years ago.

(2) approximately 1/5th of Marginal wine consumers shifted to non-adopter status since 2019. Therefore the true proportion of those “drinking less” during the 2020-2021 period is understated here, and the proportion “drinking more” is overstated.

Wine Drinkers	20's	30's	40's	50's	60's	70+
Drinking More	49%	48%	35%	25%	18%	18%
Drinking Less	20%	23%	20%	28%	24%	21%
Drinking About the Same	31%	30%	45%	47%	59%	61%
Net % point change (difference between drinking more and less)	+29	+25	+15	-3	-6	-3

Highlighting = Statistically significantly higher than 4, 3, 2, 1 other segments.

May not add to 100% due to rounding

WINE MARKET COUNCIL

Base: U.S. wine drinkers: 21-29, n=205; 30-39, n = 360; 40-49, n = 274; 50-59, n = 296, 60-69, n= 358; 70+, n = 279

Source: WMC – U.S. Wine Consumer Segmentation Survey, October-November 2021

Change in Wine Consumption vs. “A Couple of Years Ago” Among Wine Drinkers - By Gender, Ethnicity

Wine Drinkers	Male	Female	Non-Hispanic White	Hispanic*	Black	Asian American**
Drinking about the same	47%	45%	50%	33%	38%	47%
Drinking more	33%	30%	29%	41%*	34%	33%
Drinking less	20%	25%	22%	26%*	28%	20%
Net % point change (difference between drinking more and less)	+13	+5	+7	+15	+6	+13

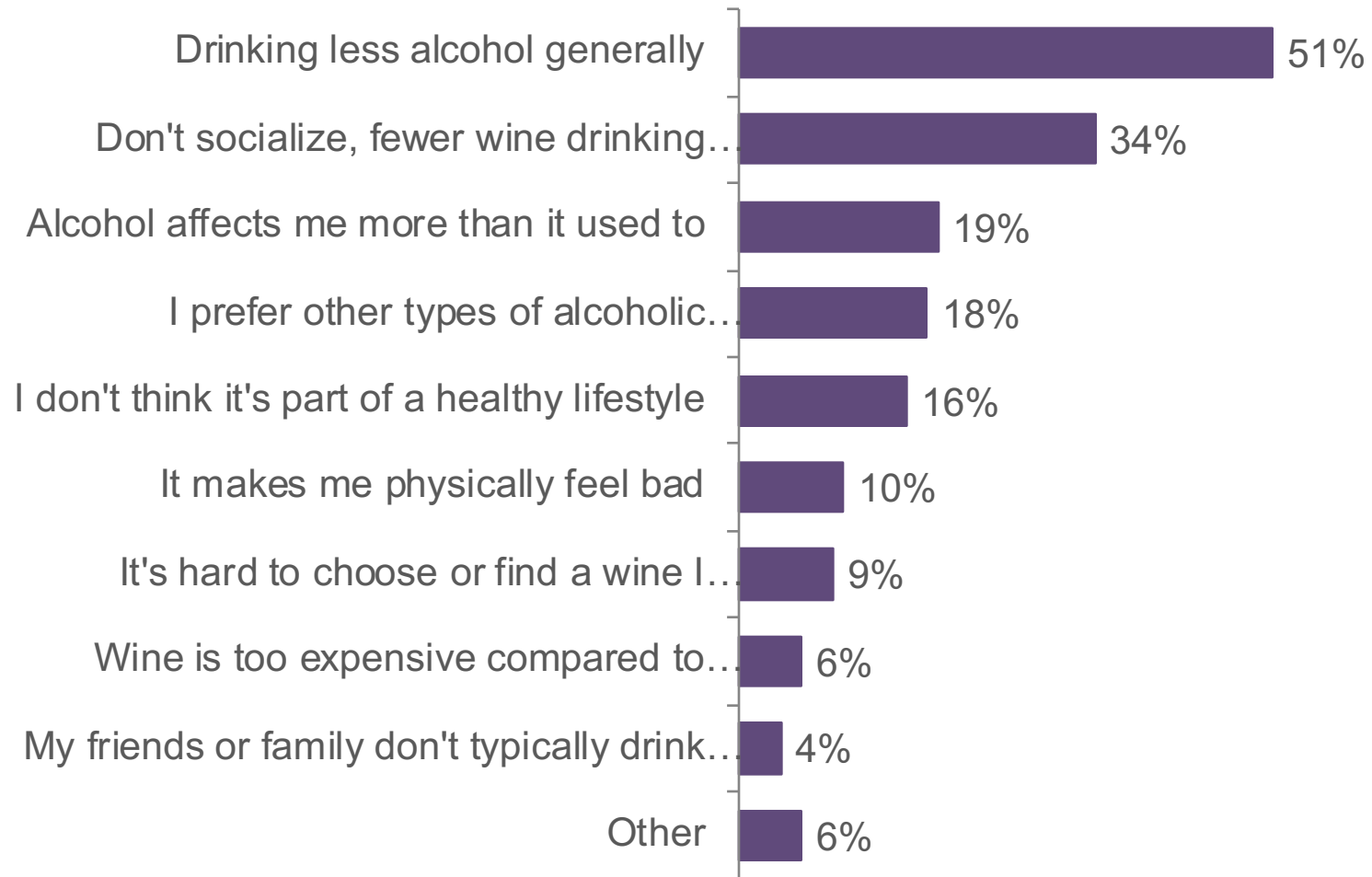
* Adjusted for unrepresented Spanish dominant segment, per WMC EthniFacts 2022 report (See page 6)

**Caution: Small sample size

Highlighting = Statistically significantly higher than 2, or 1 other segment

WINE MARKET COUNCIL

Reasons for Drinking Less Wine vs. “A Couple of Years Ago”



WINE MARKET COUNCIL

Top Reasons for Drinking Less Wine - By Wine Drinker Segment

	Core Wine Drinker	Marginal Wine Drinker
I'm drinking less alcohol generally	46%	57%
I don't socialize or have as many wine-drinking occasions as I used to	35%	36%
Alcohol affects me more than it used to	23%	19%
I don't think it's part of a healthy lifestyle or diet	21%	14%
I prefer other types of alcoholic beverages	12%	19%
It makes me feel physically bad	12%	10%
It's hard to choose or find the wines I might like	10%	7%
Wine is too expensive compared to other alcoholic beverages	9%	5%
My friends or family typically don't drink wine	2%	5%

NOTE: About 1/5th of Marginal Wine Drinkers switched to drinking mostly/all beer, spirits or other since 2019 survey. So 19% "prefer other types" among current marginal wine consumers understates this issue.

Highlighting = Statistically significantly higher than corresponding segment

WINE MARKET COUNCIL

Top Reasons for Drinking Less Wine - By Age

	20's	30's	40's	50's	60's	70+
I'm drinking less alcohol generally	40%	52%	51%	60%	53%	43%
I prefer other types of alcoholic beverages	25%	13%	13%	16%	25%	17%
I don't socialize or have as many wine-drinking occasions as I used to	20%	34%	35%	29%	39%	43%
It makes me feel physically bad	20%	11%	9%	10%	8%	7%
It's hard to choose or find the wines I might like	18%	15%	7%	4%	8%	2%
Alcohol affects me more than it used to	15%	24%	16%	20%	19%	19%
I don't think it's part of a healthy lifestyle or diet	10%	15%	22%	21%	20%	5%
Wine is too expensive compared to other alcoholic beverages	8%	7%	13%	7%	2%	2%
My friends or family don't typically drink wine	8%	6%	2%	4%	2%	2%

Highlighting = Statistically significantly higher than 2 or 1 other segment

WINE MARKET COUNCIL

Base: U.S. wine drinkers who are drinking less wine vs. "a couple of years ago," n=402

Source: WMC – U.S. Wine Consumer Segmentation Survey, October-November 2021

Top Reasons For Drinking Less Wine - By Gender, Ethnicity

	Male	Female	Non-Hispanic White	Hispanic	Black*	Asian American*
I'm drinking less alcohol generally	53%	50%	53%	53%	39%	67%
I don't socialize or have as many wine-drinking occasions as I used to	34%	35%	36%	23%	39%	33%
I prefer other types of alcoholic beverages	29%	11%	17%	21%	14%	27%
Alcohol affects me more than it used to	13%	23%	18%	30%	17%	33%
It makes me feel physically bad	11%	10%	10%	13%	5%	13%
I don't think it's part of a healthy lifestyle or diet	11%	19%	16%	15%	20%	7%
Wine is too expensive compared to other alcoholic beverages	7%	5%	6%	9%	7%	7%
It's hard to choose or find the wines I might like	6%	10%	7%	15%	3%	13%
My friends or family typically don't drink wine	3%	5%	4%	2%	5%	--

* Caution: small base size

Highlighting = Statistically significantly higher than **corresponding** segment

WINE MARKET COUNCIL

Base: U.S. wine drinkers who are drinking less wine vs. "a couple of years ago," n=402

Source: WMC – U.S. Wine Consumer Segmentation Survey, October-November 2021

Data Trends 2015-2021



Basic Consumer Segments: 2015 – 2021

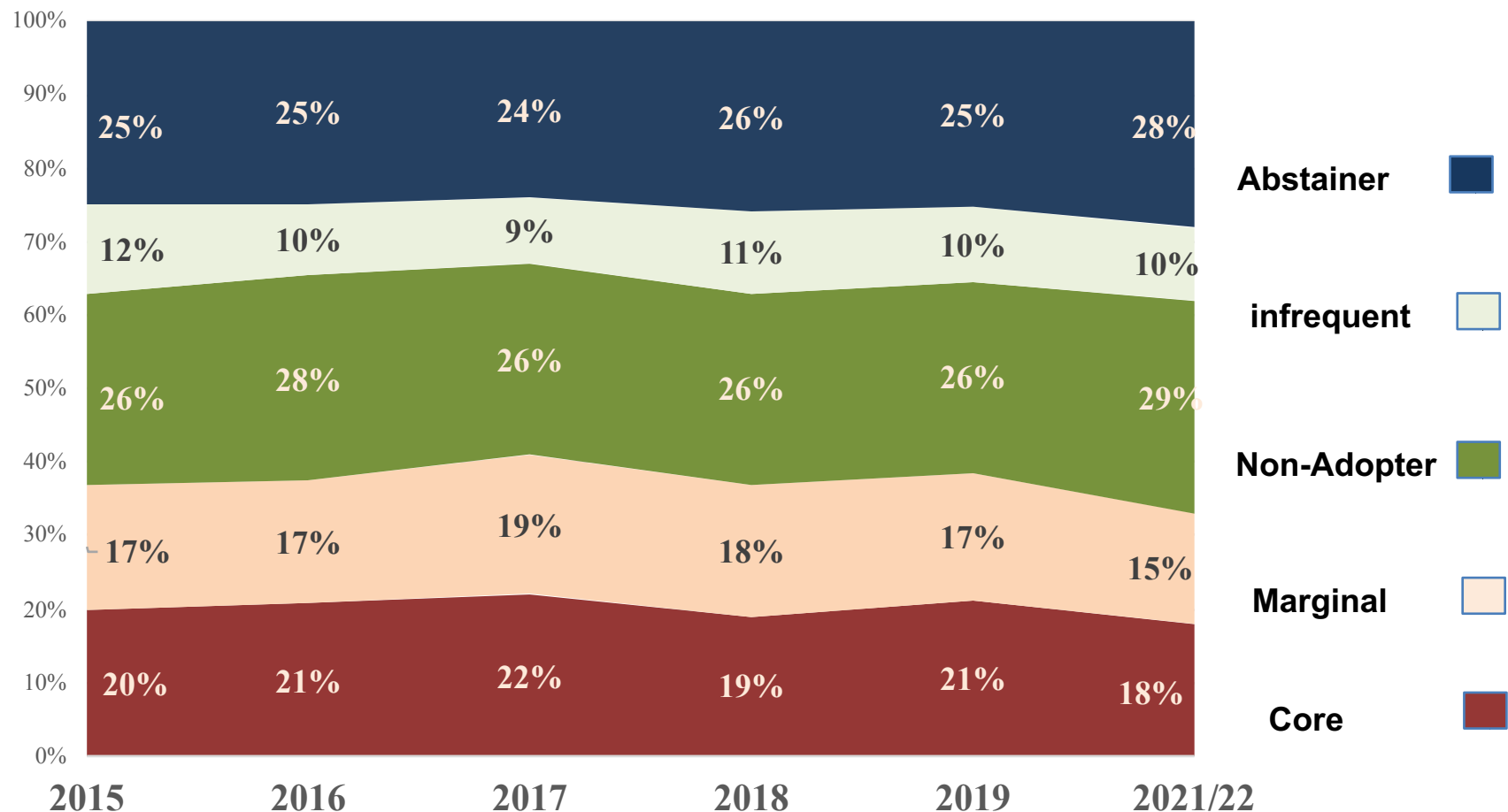
	2015	2016	2017	2018	2019	2021
Core Wine Drinker (Drink wine once/week+)	20%	21%	22%	19%	21%	18%
Marginal Wine Drinker (Drink wine less than once/week but at least every 2-3 months)	17%	17%	19%	18%	17%	15%
Non-Adopter (Drink beer/spirits/other alcohol but no wine)	26%	28%	26%	26%	26%	29%
Infrequent Alcohol (Drink alcohol less often than every 2-3 months)	12%	10%	9%	11%	10%	10%
Abstainer (Do not drink alcohol)	25%	25%	24%	26%	25%	28%

May not add to 100% due to rounding

WINE MARKET COUNCIL

Base: U.S. Adults, 21+; 2015, n=2,903; 2016, n=6,770; 2017, n=5,724; 2018, n=5,646; 2019, Fall 21/Spring 22, n=7,569
Source: WMC-U.S. Wine Consumer Segmentation Surveys, 2015-2022

Basic Consumer Segments: 2015-2022*



WINE MARKET COUNCIL

Base: U.S. Adults, 21+; 2015, n=2,903; 2016, n=6,770; 2017, n=5,724; 2018, n=5,646; 2019, n=5,640;

*Fall 21/Spring 22, n=7,569 Source: WMC-U.S. Wine Consumer Segmentation Surveys, 2015-2022

Wine, Beer, & Spirits Consumption* Crossover Among Total Wine Drinkers: 2015 – 2022

	2015	2016	2017	2018	2019	2021/ 2022
Drink wine only	21%	23%	23%	20%	19%	18%
Drink wine and “other” only	NA	NA	NA	NA	NA	4%
Drink wine, beer, & spirits	40%	39%	40%	40%	44%	37%
Drink wine, beer/no spirits	22%	21%	19%	21%	19%	19%
Drink wine, spirits/no beer	18%	18%	18%	19%	18%	22%

*Consume at least every 2 – 3 months

May not add to 100% due to rounding

NA- Not Available

WINE MARKET COUNCIL

Base: U.S. wine drinkers: 2015, n=1,066; 2016, n=2,545; 2017, n=2,311; 2018, n=2,105; 2019, n=2,290, *Fall 21/Spring 22, n=2,486

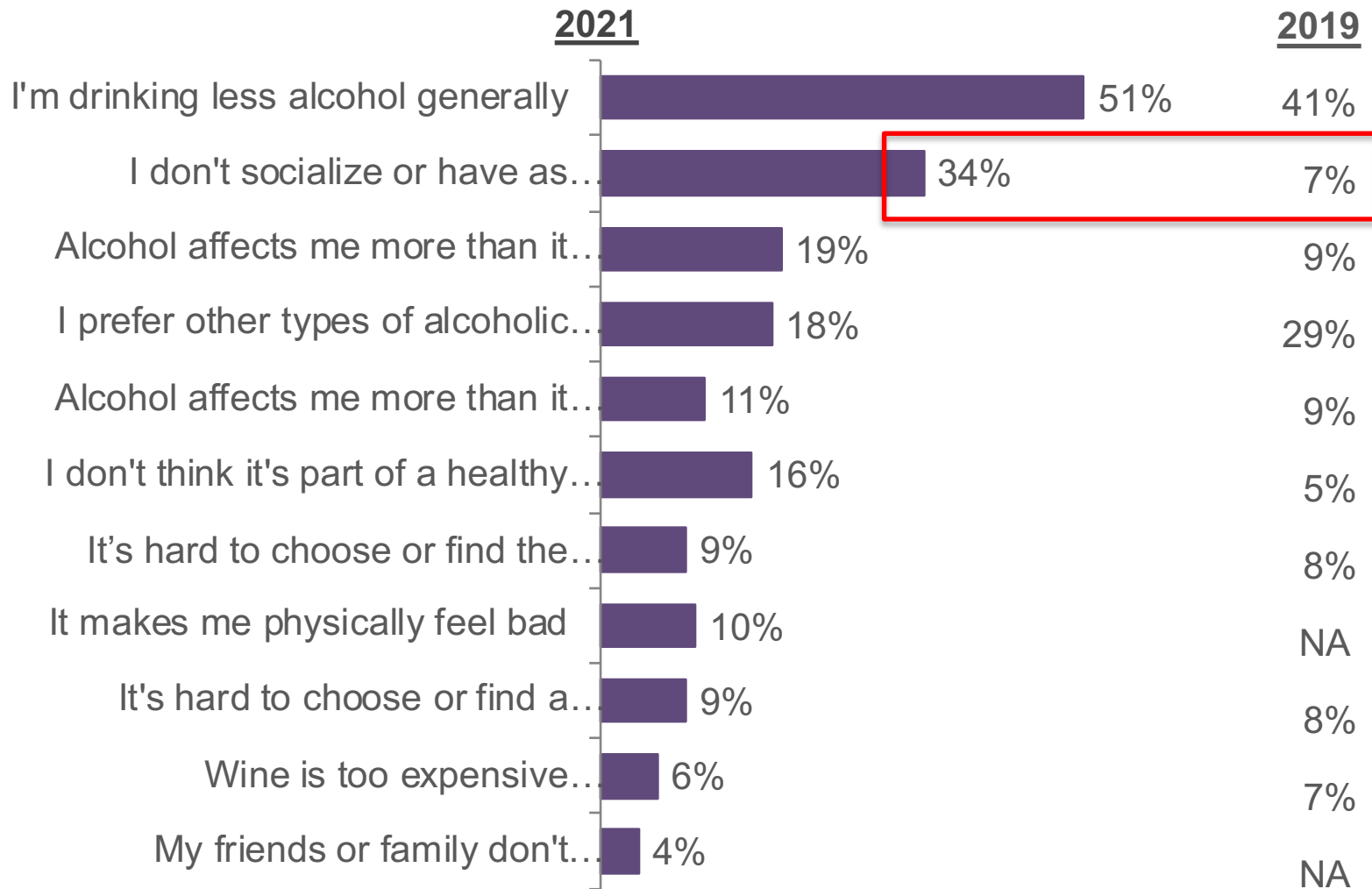
Source: WMC – U.S. Wine Consumer Segmentation Surveys, 2014 - 2022

Consumption Frequency Among U.S. Wine Drinkers: 2015 – 2022* (% of LDA population)

	2015	2016	2017	2018	2019	2021/ 2022
<u>Wine Drinkers</u>	<u>37%</u>	<u>38%</u>	<u>40%</u>	<u>37%</u>	<u>39%</u>	<u>33%</u>
High End Wine Drinker (> than 1 x week, buy \$20+ 750s at least monthly)	4%	NA	6%	4%	5%	4%
High Frequency, not High End ((> than 1 x week, but buy \$20+ 750s less often than monthly)	10%	NA	9%	9%	9%	7%
Drink Wine 1x week or less often	24%	24%	26%	25%	25%	22%

Retail price point question not asked in 2016

Reasons for Drinking Less Wine vs. “A Couple of Years Ago” 2021 responses vs. 2019 Responses



WINE MARKET COUNCIL

Monthly+ Purchasing Among Wine Drinkers

- By Price Segment 2015-2022*

	2015	2018	2019	2021/ 2022
Under \$10	29% ¹	39%	38%	39%
\$10 - \$14.99	31%	39%	39%	45% ³
\$15 - \$19.99	18%	24%	26%	NA ³
\$20 - \$29.99	9%	14% ²	15% ²	18%
\$30 - \$49.99	4%	6%	8%	10%
\$50+	4%	4%	6%	7%

*Retail price question not asked in 2016 ¹ \$5-9.99 ² \$20-24.99 ³ \$10-19.99

Monthly+ Purchasing Among Wine Drinkers

– By Select Package Types 2015-2021*

	2015	2017	2018	2019	2021
187ml (single serve bottles or 4 pk)	8%	10%	14%	16%	17%
375ml bottle	NA	9%	11%	13%	14%
1.5L bottle	16%	12%	13%	14%	15%
3L jug or larger or magnum	5%	6%	6%	8%	8%
5L box	8%	9%	8%	11%	7%
Tetra Pak	3%	4%	4%	5%	6%
Can	NA	5%	9%	10%	11%

*375 ml bottle and Can not asked in 2015, package purchase question not asked in 2016

WINE MARKET COUNCIL

Base: U.S. Wine Drinkers: 2015, n=1,066; 2016, n=2,545; 2017, n=2,311; 2018, n=2,105; 2019, n=2,209; 2021, n=1,772.

Source: WMC – U.S. Wine Consumer Segmentation Surveys, 2015 - 2021

Appendix: Verbatim Questionnaire



Wine Market Council Benchmark Questionnaire 2021/2022

W1* Which of the following kinds of alcoholic beverages do you drink at least once every two or three months?
[Select as many as apply for 01-04. Randomize 01-03]

- 01 Wine of any type (sparkling or still)
- 02 Beer of any type
- 03 Spirits or liquor of any kind, on its own or mixed in cocktails
- 04 Other alcoholic beverages, such as hard cider, fruit flavored wines, hard seltzers like White Claw, flavored alcoholic beverages like Mike's Hard Lemonade, wine-based drinks like sangria or spritzers, etc.
- 05 I drink alcoholic beverages less often than every two to three months [EXCLUSIVE]
- 06 I do not drink alcoholic beverages at all [EXCLUSIVE]

[ASK IF W1 (01) OR (04)]

W1A Which of the following kinds of alcoholic beverages do you drink at least once every two or three months?
[Select as many as apply for 1-7. Randomize 1-7]

- 01 Fortified wine such as Port, Sherry, Vermouth
- 02 Fruit or fruit-flavored wine
- 03 Wine-based drinks (such as sangria, wine spritzers, etc.)
- 04 Cider (such as Woodchuck, Angry Orchard, Blake's)
- 05 Premixed/Ready-to-drink cocktails (large bottles or single-serve cans or bottles)
- 06 Hard seltzers (such as White Claw, etc.)
- 07 Hard tea or Hard Kombucha
- 08 None of the above [EXCLUSIVE]

*Asterisks denote Questions asked in both the four Fall and the two Spring waves

[ASK IF W1 (NOT 01)]

W1B You mentioned you do not drink wine of any type (sparkling or still) at least once every two or three months. Why don't you drink wine more often or at all? **[Select as many as apply. Randomize 1-9]**

- 01 Wine is too expensive compared to other alcoholic beverages
- 02 It's hard to choose or find wines I might like
- 03 I don't like the way it tastes
- 04 I prefer the taste of other types of alcoholic beverages
- 05 My friends/family don't drink wine
- 06 It doesn't fit my personality or style
- 07 I don't think wine is part of a healthy lifestyle
- 08 It makes me physically feel bad
- 09 A regular-sized bottle is too much for occasions when I typically drink alcohol
- 10 Other **[Please specify]**

W2.* About how often would you say you drink...? **[Select one answer for each. Randomize A-C in same order as W1]**
[SET UP AS GRID]

- 01 Every day
 - 02 More than once a week, but not every day
 - 03 Once a week
 - 04 Two or three times a month
 - 05 Once a month
 - 06 Every two or three months
-
- A. Wine (sparkling or still) **[DISPLAY IF W1 (01)]**
 - B. Beer of any type **[DISPLAY IF W1 (02)]**
 - C. Spirit/Liquor/Cocktails **[DISPLAY IF W1 (03)]**
 - D. Other alcoholic beverages, such as hard cider, fruit flavored wines, hard seltzers like White Claw, flavored alcoholic beverages like Mike's Hard Lemonade, wine-based drinks such as sangria or spritzers, etc. **[DISPLAY IF W1 (04)]**

W3 Which of these statements best describes you? **[Select one answer]**

- 01 I prefer wine to other alcoholic beverages, but tend to drink it only for special occasions or when celebrating
- 02 I prefer wine to other alcoholic beverages and drink it more often than just for special occasions
- 03 I prefer other alcoholic beverage(s) to wine, and drink them more often
- 04 I do not like wine all that much but drink it occasionally
- 05 I really do not like wine
- 06 I haven't had enough experience with wine to have an opinion about it

W4 In general, would you say you are drinking more, less, or about the same amount of the beverages listed below, as you did a couple of years ago? **[Select one answer for each. Randomize A-C in same order as W1] [SET UP AS GRID]**

- 01 More
- 02 Less
- 03 About the same

- A. Wine
- B. Beer **[DISPLAY IF W1 (02)]**
- C. Spirits/Liquors/Cocktails **[DISPLAY IF W1 (03)]**
- D. Other alcoholic beverages, such as hard cider, fruit flavored wines, hard seltzers like White Claw, flavored alcoholic beverages like Mike's Hard Lemonade, wine-based drinks such as sangria or spritzers, etc. **[DISPLAY IF W1 (04)]**

[ASK IF W4A (02)]

W4A Why are you drinking less wine? **[Select as many as apply. Randomize 01-09]**

- 01 I'm drinking less alcohol generally
- 02 Wine is too expensive compared to other alcoholic beverages
- 03 I don't think it's part of a healthy lifestyle or diet
- 04 It makes me feel physically bad
- 05 Alcohol affects me more than it used to
- 06 I don't socialize or have as many wine-drinking occasions as I used to
- 07 It's hard to choose or find the wines I might like
- 08 I prefer other types of alcoholic beverages
- 09 My friends or family typically don't drink wine
- 10 Other **[Please specify]**

W5* Please indicate how often, on average, you buy wine in a 750ml bottle (that is, regular sized bottle) at retail in these price ranges? **[Select one answer for each] [SET UP AS GRID]**

- 01 Weekly
- 02 Monthly
- 03 Several times a year
- 04 Once a year or less
- 05 Never

- A. Under \$10
- B. \$10 to \$14.99
- C. \$15 to \$19.99
- D. \$20 to \$29.99
- E. \$30 to \$49.99
- F. \$50 or more

W6 Please indicate how often, on average, you buy wine in the following package sizes. **[Select one answer for each]**

- 01 Weekly
- 02 Monthly
- 03 Several times a year
- 04 Once a year or less
- 05 Never

- A. 187ml/single serve bottles, individuals or 4-pack
- B. 750ml bottle (a regular sized bottle)
- C. 375ml bottle (half bottle)
- D. 1.5-liter bottle or a magnum
- E. 3-liter or larger bottle/jug
- F. 1.5-liter or 3-liter box wine
- G. 5-liter box wine
- H. Tetra Pak
- I. Can (any size)

W7 Which varieties of wine listed below did you drink during the past 12 months, and how often? [Select one answer for each. Randomize A-W, keeping A-I, J-O, P-Q, and R-W as blocks and randomize within. Programming note: show categories above each block]

- 01 Drank regularly during the year
- 02 Drank occasionally or only certain times of the year
- 03 Drank rarely or never

Red Wines

Cabernet Sauvignon
Merlot
Pinot Noir
Zinfandel
Syrah or Shiraz
Garnacha or Grenache
Malbec
Tempranillo
Red blends

Rosé/Blush

Off-dry or sweet rosé, pink or blush, such as White Zinfandel
Dry rosé or pink wine

White Wines

Chardonnay
Pinot Grigio or Pinot Gris
Riesling
Sauvignon Blanc or Fume Blanc
Moscato/Muscat
White blends

Sparkling Wine

French Champagne
Domestic sparkling wine
Prosecco
Cava
Sparkling Moscato/Muscat
Sparkling rosé

Any other (any category) [Please specify]

W8

Below is a list of different countries that produce wine. Please indicate if you drink wine from each country regularly, occasionally, rarely or never. **[Select one response for each. Randomize A-L] [SET UP AS GRID]**

01 Drink regularly during the year

02 Drink occasionally

03 Drink rarely or never

A. France

B. Italy

C. Australia

D. New Zealand

E. Chile

F. Argentina

G. Spain

H. Germany

I. South Africa

J. Portugal

K. Austria

L. Greece

W9

Below is a list of states within the U.S. that produce wine. For each one, please indicate if you drink wine made in that state regularly, occasionally, rarely or never. **[Select one response for each. Randomize A-H] [SET UP AS GRID]**

01 Drink regularly during the year

02 Drink occasionally

03 Drink rarely or never

A. California

B. Oregon

C. Washington State

D. New York State

E. Texas

F. Virginia

G. Missouri

H. Michigan

- W10 Thinking about where you shop for wine, please indicate about how often you buy wine from each of these store types. **[Select one answer for each. Randomize A-J] [SET UP AS GRID]**
- 01 Weekly or more often
 - 02 A few times a month.
 - 03 Several times a year...
 - 04 Less often
 - 05 Don't buy wine here
-
- A. A supermarket or grocery store where you also buy food (including specialty food stores such as Trader Joe's or Whole Foods)
 - B. A mass merchandiser (such as Walmart or Target)
 - C. A large wine/liquor store or chain (such as Total Wine, Specs or Applejack)
 - D. A small store specializing in wine, including imports and small producers
 - E. A virtual (online only) retailer (such as wine.com)
 - F. Warehouse or club store (such as Costco or Sam's Club)
 - G. Convenience store (such as 7-11)
 - H. Drugstore
 - I. Using a delivery app
 - K. Directly from wineries (through its website, via a club, or during a visit)
-
- W11 Have you visited a winery to taste and learn about the wines and/or do you plan to do so in the future? Please select all that apply for each. **[Select as many as apply for 01-02 for each. Randomize A-D]**
- 01 Visited in the past...
 - 02 Plan to visit in next 1-2 years..
 - 03 Haven't visited/Have no current plans to visit **[EXCLUSIVE]**
-
- A. Wineries in California
 - B. Wineries in Oregon
 - C. Wineries in Washington
 - D. Wineries in other countries
 - E. Wineries in other states **[Please specify state]**