



Wine & Other Alcohol Consumption Among 21-29 Year Old U.S. Wine Consumers

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Why this Research

A survey was conducted to provide an updated look at the wine consumption habits of U.S. adults in their 20s and 55 and older. Wine Market Council wanted to learn more about how younger and older wine drinkers are engaging with wine, and why some in these age groups are not. More specifically, the goal of this survey was to examine the validity of claims that Millennials are turning away from wine, and to gain insight into the impact on the market as the Baby Boomers move into their senior years.

Research Methodology

Wine Market Council conducted an online survey in partnership with Illuminate Research, Seattle WA, in April 2019 using sample sourced from Research Now/Survey Sampling, Inc.¹ The sample was collected using age and gender target quotas based on wine consumption frequency cohorts defined by the 2018 Wine Market Council segmentation study. 1,190 U.S. adults aged 21-29 and 1,214 aged 55+ across the wine consumption spectrum, from everyday drinkers to non-wine drinkers, participated. The 21-29 consumer sample was weighted by consumption based on the WMC 2018 benchmarks due to underrepresentation of younger males in the respondent pool.

¹ Sample was targeted to wine drinkers from a non-probability online panel, with quotas for wine drinking frequency, gender and age. Survey results should not be used to project or estimate results to the entire U.S. population.

To qualify, respondents were required to consume alcohol at least every 2-3 months. Respondents who drink wine at least every 2-3 months were classified as wine drinkers. Respondents who drink wine less often than once every 2-3 months or don't drink wine at all were considered infrequent/non-wine drinkers. Respondents represented all U.S. states and the District of Columbia.

Significant differences noted in this report represent data comparisons that are statistically significant at a confidence level of 95%. In addition, in some cases, rows or columns of figures do not add to 100% due to rounding.

What's in this Report

This report focuses on the consumption of wine and other alcoholic beverages by younger (21-29) U.S. adults. It examines current consumption, changes in consumption, and the crossover consumption of wine, beer, spirits, and other alcoholic beverage products. The alcoholic beverage consumption among the respondents aged 55+ will be the subject of a subsequent report. Additional reports based on the results of this survey on the topics of wine drinking occasions, purchase habits, and a comparison of Baby Boomer wine drinkers aged 55-64 in 2010 and 2019, will be made available in the coming months.

Respondent Pool Composition – Younger Respondents Aged 21-29

Age and gender quotas based on the 2018 Wine Market Council segmentation study, were used to match the population proportions of wine drinkers (drink wine at least once every 2-3 months) vs. infrequent wine drinkers (drink wine less often than once every 2-3 months) and non-wine drinkers in the U.S. adult population. Infrequent wine drinkers and non-wine drinkers were surveyed in order to investigate why some U.S. consumers in their 20s do not drink wine, and what they are drinking instead.

This report looks at the 21-29 age group, and on some measures respondents 21-24 (iGeneration) and 25-29 were compared. The composition of the respondent pool by age and wine consumption frequency is as follows:

- ✓ 666 younger wine drinkers respondents aged 21-29. This age range includes both members of the iGeneration (21-24) and the youngest Millennials.
 - Approximately one-third (37%) of this group were aged 21-24 and two-thirds (63%) were aged 25-29.
- ✓ 524 younger infrequent/non-wine drinkers aged 21-29.
 - Approximately one-third (35%) of this group were aged 21-24 and two-thirds (65%) were aged 25-29.

Total Respondents by Wine Consumption Frequency and Age

Age	Total Wine Drinkers (n)	Infrequent/Non-Wine Drinkers (n)	Total (n)
<u>21-29</u>	<u>666</u>	<u>524</u>	<u>1,190</u>
21-24	247	186	433
25-29	419	338	757

For demographic comparisons of respondents within the younger age group and by wine consumption frequency see Appendix I.

In this analysis, most of the answers of those respondents who drink wine once a week were more similar to high frequency wine drinkers than occasional wine drinkers. For this reason, high frequency and once-a-week wine drinkers were grouped into a "Core" wine consumption segment for the purpose of segment analysis.



Key Learnings

Key Learnings

NOTE: all text in this report refers to consumers aged 21-29.

- ✓ There was no statistically significant difference found between the rate of self-reported wine consumption among those aged 21-24 (iGen) and those 25-29 (the youngest Millennials).
- ✓ Survey results on preference and whether or not consumers like wine and why suggest that the battle for wine's share among marginals and infrequent/non-wine drinkers in their 20s is very different. The vast majority of marginals like wine, so the battle is centered around availability and appropriateness by occasion. For the infrequent/non-wine drinker, finding the right wine for their taste may be more important.
 - Most infrequent/non-wine drinkers in their 20s prefer some other kind of alcohol to wine. In fact the top reason given for not drinking wine was not liking the taste. Second tier reasons included difficulty choosing a wine they might like and wine not fitting their personality or style. By contrast, the majority of 21-29 year old Core wine drinkers prefer wine. Marginal wine drinkers were split fairly evenly between preferring wine and preferring another type of alcohol.
 - The majority infrequent/non-wine drinkers don't like wine, while the majority of Core wine drinkers like wine and drink it on more than just special occasions. The majority of Marginal wine drinkers are fairly evenly split between liking and drinking wine on more than just special occasions and liking wine and only drinking it on special occasions.
- ✓ Respondents in their 20s were just as likely to report that they drink wine weekly as to report they drink spirits weekly. However, the rate of weekly beer consumption among this group was slightly higher than for wine and spirits.
- ✓ Respondents who drink wine once a week or more often (Core wine drinkers) are more frequent consumers of beer and spirits than those who drink wine less often than once a week or not at all. Furthermore, infrequent*/non-wine drinkers in their 20s are less likely to drink beer, spirits, or other alcohol than wine drinkers their same age. These findings suggest that the difference between wine drinkers and non-drinkers is primarily consumption of alcohol broadly, not the substitution of beer or spirits for wine and that more frequent alcohol consumers drink a wider array of alcoholic beverages.

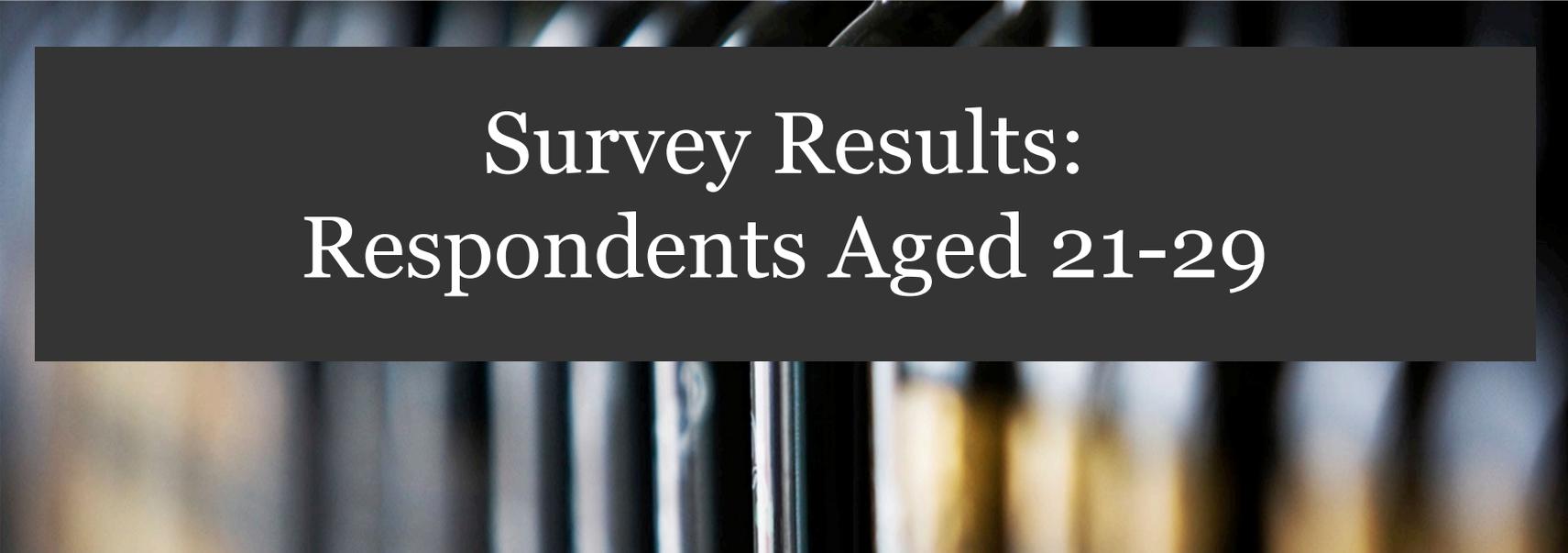
*Drink wine less often than once every 2-3 months.

Key Learnings

- ✓ Beer drinkers aged 25-29 are more apt to drink all types of beer monthly than 21-24 year olds (i.e., domestic, imported, craft). Spirits drinkers aged 25-29 are also more apt to drink straight spirits than 21-24 year olds.
- ✓ Men in their 20s are more likely than women to drink beer and straight spirits, while women are more apt to drink cocktails.
- ✓ Premixed, ready-to-drink cocktails topped the list of “other alcohol” (a category separate from wine, beer, or spirits) consumed monthly by total respondents, followed by cider and wine-based drinks such as sangria and spritzers. These beverages overshadowed hard seltzers and hard teas.
 - Consumption of premixed, ready-to-drink cocktails is consistent between male and female wine drinkers, but infrequent/non-wine drinker males are significantly less likely than their female counterparts to drink these types of alcoholic beverages.
- ✓ The proportion of respondents in their 20s who reported drinking more wine versus a couple of years ago surpassed those who are drinking less wine. However, it is critical to note that three-quarters of those who have increased their wine consumption weren’t drinking it or rarely drank it a couple of years ago. Thus only about one-quarter are drinking more wine from a base of ongoing consumption, roughly the same proportion as those who reported decreased consumption.
 - The top two reasons for drinking more wine among 21-29 year olds are: (1) finding more wines they like and (2) having acquired a taste for wine.
 - 21-29 year old wine drinkers who reported increased consumption were more likely to attribute that increase to drinking more wine per occasion than an increase in wine drinking occasions.
- ✓ Among those who had reduced their wine consumption, the top reason given was an overall decrease in alcoholic beverage consumption, closely followed by the expense of consuming wine.
 - Decreases in consumption were more often attributed to a decrease in the number of wine drinking occasions than to decreased amount per occasion.
 - Decreased wine consumption most often shifted from weekly to monthly wine consumption.

Key Learnings *(continued)*

- A good portion of those drinking less wine, also decreasing their consumption of other types of alcohol—four in ten are increasing their beer consumption, half decreased their spirits consumption, and the most frequently reported change in “other alcoholic beverage” consumption was a reduction.
- ✓ Cannabis usage was consistent across the 21-24 and the 25-29 age groups, with about half of those in states where it is legal considering themselves cannabis consumers.
 - Overall cannabis usage was higher among Core wine drinkers compared to Marginal wine drinkers, and usage among Core drinkers was statistically tied with that of infrequent/non-wine drinkers.
 - Among non-users, interest was consistent across age groups and wine consumption frequency segments.
 - Base sizes were too small to get a read on whether respondents drinking less wine are more apt to be cannabis users.



Survey Results: Respondents Aged 21-29

Wine and Other Alcohol Consumption

- ✓ 61% of the 21-29 year old respondents¹ consider themselves wine drinkers (defined as consuming wine at least once every 2-3 months). This was consistent with the rate of wine consumption among total U.S. adults who drink alcohol at least once every 2-3 months (58%).² There was no difference in this measure between 21-24 and 25-29 year old respondents.
- ✓ Approximately three in ten respondents indicated they drink wine weekly and spirits weekly. More than one-third, nearly four in ten, drink beer weekly.
 - There was no difference in the proportion of 21-24 and 25-29 year olds who drink beer, wine, and spirits. Frequent consumption of wine and spirits between these two groups was at parity, while the rate of frequent beer consumption among 25-29 year olds was found to be directionally higher.

¹All who participated in this survey drink some type of alcohol at least once every 2-3 months.

²Wine Market Council Annual Segmentation Study, 2018.

Wine Consumption Among Total Respondents (Aged 21-29)**

	21-29 (n=1190)	21-24 (n=433)	25-29 (n=757)
More than once a week	16%	14%	17%
Once a week	13%	15%	12%
Less often than once a week, but at least every 2-3 month	32%	34%	30%
Infrequent/Non-wine drinker	39%	37%	41%

**All respondents drink alcohol at least once every 2-3 months.

Wine, Beer, and Spirits Consumption Among Total Respondents (Aged 21-29)



Wine and Other Alcohol Consumption (Continued)

- ✓ Respondents in their 20s who drink wine at least once a week (Core wine drinkers) were significantly more likely than those who drink wine less often or not at all to report they drink beer and spirits on a weekly basis.
 - Although 21-29 year old Core wine drinkers drink beer more often than marginal wine drinkers, the majority of both Cores and Marginals in this age group drink beer at least once a month.
 - Among 21-29 year old infrequent/non-wine drinkers, beer consumption is more equally distributed across consumption frequencies from weekly to not-at-all consumption.
 - Like beer, spirits consumption among 21-29 year old wine consumers is highest among Core wine drinkers.

Wine Interaction with Beer & Spirits Aged 21-29

Wine consumption ---> frequency	Core (n=345)	Marginal (n=321)	Infrequent/ Non-Drinker (n=524)
BEER Weekly+	63%	33%	27%
BEER 1-2x month	19%	32%	22%
BEER less often	9%	16%	24%
Don't Drink Beer	9%	19%	27%
SPIRITS Weekly+	53%	19%	17%
SPIRITS 1-2x month	33%	48%	32%
SPIRITS less often	10%	28%	34%
Don't Drink Spirits	4%	6%	18%

Wine and Other Alcohol Consumption (Continued)

- ✓ When wine drinkers who drink beer were asked what category of beer they drink at least once a month, domestic beer, led domestic craft beer and imports among 21-29 year olds.
- ✓ Those 25-29 were more apt than those 21-24 to report monthly consumption of all types of beer and straight spirits.
- ✓ Of note is that men in their 20s, whether wine drinkers or not, are more likely than women to drink beer (all types) and straight spirits on a monthly basis. Women in this age group, whether wine drinkers or not, are more likely than men to drink cocktails (not-premixed).
 - When it comes to premixed, ready-to-drink cocktails, male wine drinkers are more than twice as likely as male infrequent/non-wine drinkers to consume premixed, ready-to-drink cocktails (26% vs. 13%), while consumption among women is consistent despite their level of wine consumption.
- ✓ Core wine drinkers in their 20s drink all of these beverages more often on a monthly basis than those who drink wine less often or not at all.

Monthly Beer and Spirits Consumption by Category Among Total Respondents* (Aged 21-29)

Drink at least 1 x month...	21-29 (n=1190)	21-24 (n=433)	25-29 (n=727)
Domestic beer	39%	34%	43%
Domestic craft beer	27%	20%	30%
Imported beer	33%	28%	37%
Cocktails	29%	26%	30%
Premixed, ready-to-drink cocktails	24%	26%	23%
Straight spirits	27%	23%	30%

Wine and Other Alcohol Consumption (Continued)

Digging deeper into the “Other Alcohol” category (such as White Claw, Mike’s Hard Lemonade, alcohol spritzers, hard cider, etc.), respondents who indicated they drink these types of “other alcoholic beverages” at least once every 2-3 months were asked which from a list at right they drink at least once a month.

- ✓ Cider and wine-based drinks (such as sangria, wine spritzers, etc.) are consumed monthly by approximately one-fifth of respondents. Monthly consumption of all beverages at right was consistent between 21-24 and 25-29 year olds.
- ✓ Again, 21-29 year old Core wine drinkers are more apt than Marginals and non-wine drinkers to consume all of these beverages on a monthly basis. However, Marginal wine drinkers are also more apt to drink hard seltzers and wine-based drinks than infrequent/non-wine drinkers.

Monthly Consumption of “Other Alcohol” by Category Among Total Respondents (Aged 21-29)*

Drink at least 1 x month...	21-29 (n=1190)	21-24 (n=433)	25-29 (n=757)
Cider	21%	23%	20%
Wine-based drinks	20%	21%	19%
Hard seltzers	14%	14%	14%
Hard tea	14%	12%	14%
Mead	3%	3%	3%

Cannabis Usage

Respondents were also asked about their Cannabis usage. Only results from respondents who live in cannabis-legal states were analyzed.

- ✓ Approximately half of those aged 21-29 reported using cannabis.
 - There was a significant difference between those 21-24 and those 25-29 in their reasons for usage, with recreational higher among the younger group and medical higher among those 25-29.
- ✓ Overall cannabis usage was higher among Core wine drinkers, but only compared to Marginal wine drinkers. Overall Core usage was on par with infrequent/non-wine drinker usage. Reported medical-only usage was significantly higher among Cores vs. both Marginal and infrequent/non-wine drinkers.
- ✓ Among non-users, the level of disinterest was consistent across age groups and wine consumption frequency segments, at roughly one-thirds.

Cannabis Consumption Among Total Respondents (Aged 21-29)

(Base: respondents who live in Cannabis-legal states)

	21-29 (n=285)	21-24 (n=105)	25-29 (n=181)
Consume Cannabis (net)	51%	48%	53%
Recreational or both recreational/Medical	14%	19%	10%
Medical only	37%	29%	42%
Interested in trying	15%	12%	18%
Not interested	34%	41%	30%

Cannabis Consumption by Wine Consumption Frequency (Aged 21-29)

(Base: respondents who live in Cannabis-legal states)

	Core (n=82)	Marginal (n=90)	Infrequent/ Non-wine drinkers (n=114)
Consume Cannabis (net)	61%	45%	49%
Recreational or both recreational/Medical	38%	34%	40%
Medical only	23%	11%	9%
Interested in trying	9%	18%	18%
Not interested	30%	37%	34%

Wine Consumption

- ✓ Thinking of all the wine that wine consumers drink, red and white wine makes up about two-thirds of the reported wine that 21-29 year olds drink, with only slightly more red wine consumed than white wine.
 - Women in their 20s drink more rosé than men in their 20s (21% vs. 16% on average), while men in this age group drink more red wine (37% vs. 32% on average).
 - There was no significant difference between 21-24 and 25-29 year olds on this measure.
- ✓ A slightly larger (but statistically significant) portion of wine consumed by Marginal wine drinkers is rosé, compared to Cores (21% vs, 18%)

Average Percentage of Total Wine Consumed by Wine Drinkers by Color (21-29)

	21-29 (n=666)	21-24 (n=248)	25-29 (n=418)
Red	34%	30%	31%
White	31%	33%	35%
Rosé	19%	20%	18%
Sparkling	16%	17%	16%
Total wine consumed	100%	100%	100%

Change in Overall Wine Consumption

Wine consuming respondents were asked if they are drinking more, less, or about the same amount of wine compared to a couple of years ago.

- ✓ Examining the total respondents (i.e. factoring in infrequent wine drinkers) shows an overall increase in wine consumption within each age group over the past couple of years. 42% of 21-29 ear olds reported drinking more wine in the past couple of years, while 10% reported drinking less.
- ✓ However, it is critical to note that 31% of respondents in their 20s indicated they weren't drinking wine or only consumed it infrequently a couple of years ago. Thus only about one-quarter of those increasing their wine drinking were doing so from a base of ongoing consumption, roughly the same proportion as those who decreased.
- ✓ Although there were no differences in change in consumption between 21-24 and 25-29 year old wine drinkers, 21-24 year olds were significantly more likely to have consumed wine less often than once every 2-3 months a couple of years ago.

Change in Wine Consumption vs. a Couple of Years Ago (21-29)

	21-29 (n=974)	21-24 (n=364)	25-29 (n=610)
Drinking more wine	42%	46%	40%
Drinking less wine	10%	11%	10%
Drinking about the same	16%	14%	17%
Currently drink wine less than once every 2-3 months (<i>were not asked question</i>)	32%	29%	33%
% drinking more who drank wine <once every 2-3 month a couple of years ago*	31%	38%	23%

*Data sourced from another question. All reporting "drinking more" were asked how frequently they consumed wine a couple of years ago.

- ✓ In both the younger and older age groups, Marginal wine drinkers (drink wine less often than once a week) were more likely than Core wine drinkers to report drinking less wine than they were a few years ago.

Consuming More Wine

- ✓ The top reasons given by respondents for consuming more wine compared to a couple of years ago included finding more wines they liked and acquiring a taste for wine. Both of these reasons were cited more often by 25-29 year olds.
- ✓ Considering wine good for their health was mentioned by approximately one-quarter of respondents, but by a significantly greater proportion of those aged 25-29.
- ✓ Nearly half the 21-29 year old respondents attributed their increase in wine consumption to drinking more wine per occasion, although more than a third did so by increased their number of wine-drinking occasions. Those 21-24 and 25-29 did not differ on this measure.

Why Drinking More Wine (21-29)

(Base: drinking more wine vs. a couple of years ago)

	21-29 (n=411)	21-24 (n=156)	25-29 (n=255)
Found more wines I like	47%	40%	50%
Acquired a taste	46%	40%	50%
I like wine with food	36%	35%	37%
Learned more about/ became exposed to wine	30%	29%	31%
Good for your health	28%	18%	33%
Chosen to drink wine over other beverages	26%	26%	27%
My friends drink wine	25%	22%	27%
Eat out/Go out and socialize more	24%	22%	25%
Have more money to spend on wine	23%	24%	22%
Spouse/partner drinks wine	20%	21%	20%
More packages types/sizes available	13%	16%	11%

How Drinking More Wine (21-29)

(Base: drinking more wine vs. a couple of years ago)

	21-29 (n=411)
Drinking more per occasion	48%
Increased number of occasions	37%
Both	15%

Consuming More Wine (Continued)

To evaluate the shift in wine consumption frequency among those drinking more wine, respondents were asked how often they consumed wine a couple of years ago and how often they currently drink wine.

- ✓ The the greatest gains were in those who moved into the more-than-once-a-week consumption category.
- ✓ The greatest movement was among infrequent wine drinkers (drink wine less often than once every 2-3 months) who moved into the monthly+ consumption categories.
- ✓ Past and current consumption frequency among 21-24 year olds did not differ from that of 25-29 year olds.

Current Wine Consumption Frequency vs. a Couple of Years Ago Among those Drinking More Wine (Aged 21-29, n=477)

Wine consumption ---> frequency	Couple of years ago	Currently	% pt. Shift
More than once a week	7%	46%	+39
Once a week	13%	24%	+11
1-3 times a month	32%	27%	-5
Every 2-3 months	17%	3%	-14
Less often	31%	-	-31

Consuming Less Wine

- ✓ The top reason given for drinking less wine among wine drinkers in their 20s was an overall decrease in drinking alcoholic beverages. Expense was the second most frequently mentioned reason.
- ✓ Preferring another type of alcohol and not socializing much were reasons given by nearly one-quarter of respondents. Health-related reasons were cited by less than one-fifth of respondents.
- ✓ Decreases in consumption were most often attributed to a decrease in the number of wine drinking occasions.
- ✓ There was no significant difference in the reasons why and how 21-24 and 25-29 year old respondents are drinking less wine.

*Caution: small base size.

Why Drinking Less Wine (Aged 21-29)

(Base: drinking less wine vs. a couple of years ago)

	21-29 (n=102)
Drinking less alcohol in general	31%
<u>Expenses/Money concerns (net)</u>	<u>26%</u>
Don't have as much money for wine	15%
Wine too expensive vs. other alcohol	13%
Prefer other types of alcohol	23%
Don't socialize much	23%
Don't think wine is part of a healthy lifestyle	19%
Alcohol affects me more than it used to	17%
Spending more time with people who don't drink wine	17%
Hard to choose/find wine I might like	17%
Health issues require reducing alcohol	10%

How Drinking Less Wine (Aged 21-29)

(Base: drinking less wine vs. a couple of years ago)

	21-29 (n=102)
Drinking less per occasion	38%
Decreased number of occasions	48%
Both	15%

Consuming Less Wine *(Continued)*

- ✓ The greatest shift among 21-29 year olds who reported drinking less wine was a very large decrease among more-than-once-a-week drinkers. This was true for both 21-24 and 25-29 year olds.
 - Shifts were primarily from weekly+ drinking to drinking 1-3 times a month or every 2-3 months.

Current Wine Consumption Frequency vs. a Couple of Years Ago Among those Drinking Less Wine (Aged 21-29, n=102)

Wine consumption ---> frequency	Couple of years ago	Currently	% pt. Shift
More than once a week	44%	7%	-37
Once a week	23%	12%	-11
1-3 times a month	28%	46%	+18
Every 2-3 months	5%	24%	+19
Less often	-	12%	+12

Consuming Less Wine (Continued)

- ✓ A good portion of wine drinker respondents in their 20s who are drinking less wine, are also decreasing their consumption of other types of alcohol.
 - Under half of these respondents are drinking more beer. In contrast, over half indicated they had reduced their spirits consumption. Although a minority, the most frequently reported change in “other alcoholic beverage” consumption was a reduction. Less than one-quarter increased their consumption, possibly another indication that these products are not seen as substitutes for wine.
- ✓ Base sizes for the 21-24 and 25-29 respondents who are drinking less wine were too small for meaningful analysis.

Change in Beer, Spirits, and Other Alcohol Consumption Among Those Drinking Less Wine (Aged 21-29)

	21-29 (n=102)
BEER	
Drinking more	41%
Drinking less	28%
Drinking about the same	17%
Do not drink beer	14%
SPIRITS	
Drinking more	24%
Drinking less	51%
Drinking about the same	21%
Do not drink spirits	4%
OTHER ALCOHOL PRODUCTS	
Drinking more	23%
Drinking less	39%
Drinking about the same	29%
Do not drink other alcohol products	9%

Changes in Wine Consumption Frequency

- ✓ Looking at the number of consumption frequency categories by which respondents either increased or decreased their wine consumption over the past couple of years (i.e., from a monthly to weekly wine drinkers, or vice versa) shows that respondents in their 20s were most apt to increase their consumption by the greatest number of occasions, and therefore have increased the amount of wine they are drinking overall.
- ✓ There were no differences between 21-24 and 25-29 year old respondents on this measure.
- ✓ These, along with other self-reported drinking trends, suggest that reduction of wine among those in their 20s is less problematic for the wine industry than non-adoption.

Shift in Wine Consumption Frequency Categories

(Base: total respondents)

	21-29 (n=770)
+2 consumption frequency levels	43%
+1 consumption frequency levels	19%
No change	23%
-1 consumption frequency levels	8%
-2 consumption frequency levels	8%

Reasons Infrequent/Non-Wine Drinkers Don't Drink More Wine

- ✓ Just over half of the infrequent/non-wine drinker survey participants in their 20s rarely or do not drink wine because they don't like the taste.
- ✓ Second tier reasons (cited by one-fifth to one-fourth of the infrequent/non-drinkers) were that respondents find it hard to find or choose wine they might like and that wine doesn't fit their personality or style.
- ✓ The only reason that differed between 21-24 and 25-29 year old respondents was that a significantly greater proportion of those in the older cohort reported they don't feel well after drinking wine (10% vs. 4%).

Reasons for Rarely or Never Drinking Wine (Aged 21-29) (Base: rarely or never drink wine)

	21-29 (n=405)
Don't like the taste	52%
Hard to choose wines might like	28%
Doesn't fit my personality or style	22%
Friends don't drink wine	15%
Don't feel well after drinking wine	1%
Too expensive	11%
Never really tried it	9%
Too complicated	5%
Too high in alcohol	3%

Infrequent/Non-Wine Drinkers and Wine Preferences

- ✓ Nearly all infrequent/non-wine drinkers in their 20s prefer some other alcoholic beverage to wine.
 - It should be also be noted that Marginal wine drinkers are fairly evenly split between preferring wine and some other alcoholic beverage with marginally more respondents preferring wine. In addition, one-quarter of Core wine drinkers prefer another type of alcohol over wine. Again, this suggests taste as key to whether or not a consumer embraces wine.
- ✓ When asked if they “like” wine, the great majority of infrequent/non-wine drinkers in their 20s were split equally between being a special occasion wine drinker, not liking wine but drinking it occasionally, and really not liking wine.
 - Despite most wine drinkers in their 20s liking wine, one-third are still only special occasion wine drinkers. Nearly half of Marginal wine drinkers in their 20s only drink wine on special occasions.
- ✓ These results suggest that the battle for wine’s share among Marginals and infrequent/non-wine drinkers is very different. The vast majority of Marginals like wine, so the battle is centered around availability and appropriateness by occasion. For the infrequent/non-wine drinker, finding the right wine for their taste may be more important.

Wine Preference and Degree Like Wine by Wine Consumption Frequency (Aged 21-29)

Wine consumption ---> frequency	Core (n=345)	Marginal (n=321)	Infrequent/ Non-Drinker (n=524)
Prefer wine to other types of alcohol	74%	52%	10%
Prefer some other kind of alcohol over wine	26%	48%	90%
Like wine – don’t only drink on special occasions	61%	46%	8%
Like wine but only drink on special occasions	34%	46%	28%
Don’t like wine but drink occasionally	4%	6%	28%
Really don’t like wine	1%	1%	28%
Not enough experience to have an occasions	<.5%	1%	9%



Appendix 1

Demographic Differences Aged 21-24 vs. 25-29

There were a few demographic differences between 21-24 and 25-29 year old respondents.

- ✓ The older respondents, 25-29, were more likely to have finished a college degree and to work full time. There were also more than twice as many full-time homemakers in the 25-29 age range.
- ✓ The younger cohort was more apt to include students and respondents who were not currently working.
- ✓ Although the younger cohort showed a higher mean annual income, this may be due to a few outliers and a few more male respondents in that cohort (the gap between male and female mean incomes in the 21-29 age group was quite wide, \$82K vs. \$56K). In no income range was the proportion of 21-24 year olds greater than among 25-29 year olds. In fact in one income range, \$50K - \$74K, those 21-24 lagged those 25-29 (20% vs. 28%).

¹It should be noted that the sample skewed female due to difficulty filling the quotas for males in this age group. The weighting of the data compensated for this.

²These rates are higher than current Census rates: 22% for those under 25 and 31% of those 25-29 (Source: U.S. Census Bureau, Current Population Survey/Housing Vacancy Survey, April 25, 2019). Perhaps this is related to those who are students or those living at home in a house owned by their parents.

³Due to the way this question was asked, a comparable national statistic from an authoritative source is not available.

Total Survey Respondents Aged 21-29

	21-29 (n=1190)	21-24 (n=433)	25-29 (n=757)
Male ¹	38%	40%	37%
Female	61%	59%	62%
Identify with neither	1%	1%	1%
Non-Hispanic Caucasian	52%	50%	54%
Hispanic	24%	27%	22%
Black	14%	15%	13%
Asian	6%	5%	6%
Mixed Race	3%	3%	4%
Other designation	1%	1%	1%
High school or less	34%	37%	32%
Some college/2-yr degree	36%	38%	35%
College degree	30%	25%	33%
Financial situation improved	62%	63%	62%
Financial situation same	28%	29%	28%
Financial situation worse	10%	8%	10%
Live alone	18%	19%	17%
Live with roommates	82%	81%	83%
Own home ²	38%	40%	38%
Rent home	58%	56%	60%
Other	3%	5%	2%
Mean annual income (including from all sources and comingled funds) ³	\$66K	\$71K	\$63K
Employed full time	50%	42%	54%
Employed part time	16%	16%	16%
Multiple part time jobs	1%	1%	1%
Student	10%	20%	4%
Full-time homemaker	10%	6%	13%
Currently not working	12%	15%	11%

Demographic differences by Wine Consumption Frequency

Within the 21-29 year old cohort, there were many demographic differences among respondents who drink wine with varying frequencies and those who do not.

- ✓ The Core wine drinker cohort included the most male respondents and the infrequent/non-drinker cohort the most females.
- ✓ Wine drinkers are significantly more ethnically/racially diverse.
- ✓ Wine drinkers are more educated than infrequent/non-wine drinkers.
- ✓ Wine drinkers make more money, have experienced financial improvement in the past few years, and are more apt to work full time compared to infrequent/non-wine drinkers. Core wine drinkers are more apt than Marginals and infrequent/non-wine drinkers to own a home and to live alone.

Total Survey Respondents Aged 21-29

Wine consumption frequency --->	Core (n=345)	Marginal (n=321)	Infrequent/ Non-Drinker (n=524)
Average Age	25	25	25
Male	44%	38%	34%
Female	56%	61%	65%
Identify with neither	1%	1%	1%
Non-Hispanic Caucasian	46%	41%	63%
Hispanic	26%	28%	20%
Black	19%	17%	8%
Asian	5%	8%	4%
Mixed Race	2%	5%	3%
Other designation	1%	1%	1%
High school or less	27%	28%	42%
Some college/2-yr degree	34%	40%	36%
College degree	39%	32%	22%
Financial situation improved	73%	65%	54%
Financial situation same	22%	26%	33%
Financial situation worse	5%	9%	13%
Live alone	24%	17%	14%
Live with others	76%	83%	86%
Own home	48%	38%	32%
Rent home	50%	58%	64%
Mean annual income (including from all sources and comingled funds)	\$73K	\$68K	\$59K
Employed full time	61%	51%	43%
Employed part time	16%	18%	14%
Multiple part time jobs	3%	1%	<.5%
Student	8%	12%	10%
Full-time homemaker	6%	7%	15%
Currently not working	6%	12%	17%



Wine Market Council is furnishing these survey results and other research findings (the "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 Wine Market Council shall have no liability for the member's use thereof. In no respect shall Wine Market Council 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; an whether or not loss was sustained from, or arose out of, the results of, the survey.