



Wine & Other Alcohol Consumption Among U.S. Wine Consumers Aged 55+

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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 Baby Boomers move into their senior years.

What's in this Report

This report focuses on the consumption of wine and other alcoholic beverages by older (55+) 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 survey respondents aged 21-29 is the subject of an earlier 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.

Research Methodology

Wine Market Council conducted an online survey in partnership with Illuminate Research of Seattle Washington, in April 2019 using sample sourced from Research Now/Survey Sampling (now Dynata).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.

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 are referred to as rare/non-wine drinkers in this report. 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.

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.

Respondent Pool Composition – Older Respondents Aged 55+

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. rare wine drinkers (drink wine less often than once every 2-3 months) and non-wine drinkers in the U.S. adult population. Consumers who rarely or never drink wine were also surveyed in order to investigate why some U.S. consumers aged 55+ do not drink wine, and what they are drinking instead.

Consumers aged 55 and older include Baby Boomers (currently aged 55-73) as well as respondents in older generations. This report looks primarily at the 55+ age cohort split into two age segments—those aged 55-64 (the youngest Baby Boomers) and those 65+ (“retirement” age)—as there were consistent differences in alcohol consumption behavior between these two age groups. The composition of the respondent pool by age and wine consumption frequency is as follows:

- ✓ 820 wine drinker respondents aged 55+.
 - 42% of this wine consuming group were 55-64 (the youngest Baby Boomers) and 58% were aged 65+
- ✓ 394 rare/non-wine drinkers aged 55+

Total Respondents by Wine Consumption Frequency and Age

Age	Total Wine Drinkers (n)	Rare/Non-Wine Drinkers (n)	Total (n)
<u>55+</u>	<u>820</u>	<u>394</u>	<u>1214</u>
55-64	345	188	533
65+	475	206	681

- 48% of this group were 55-64 and 52% aged 65+.

Demographic comparisons of respondents by age cohort and wine consumption frequency are included in the report Appendix.

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. Hence, for the purpose of segment analysis, high frequency and once-a-week wine drinkers were grouped into a “Core” wine consumption segment. “Marginal” wine consumers are comprised of those who drink wine less often than once a week, but at least once every 2-3 months. Respondents who drink wine once every 2-3 months were only included in the “Marginal” cohort only if they “liked” wine.



Key Learnings

Key Learnings

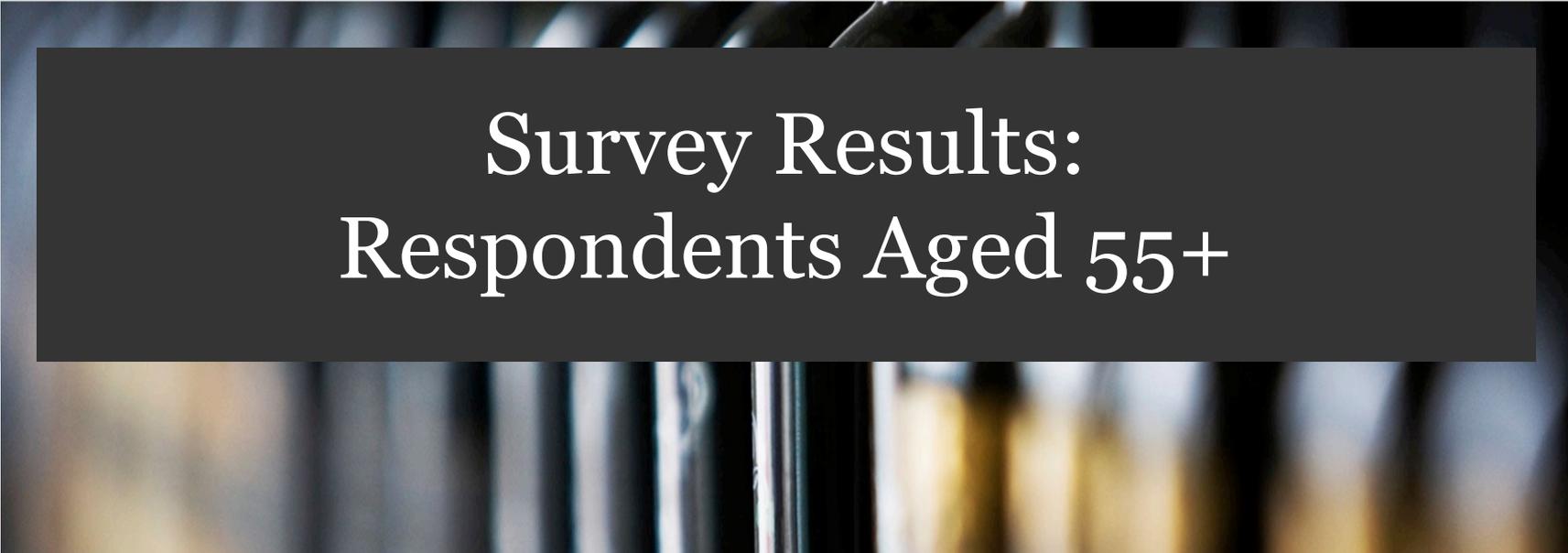
NOTE: all text in this report refers to consumers aged 55+.

- ✓ Overall, 55-64 year old respondents (the youngest Baby Boomers) drink wine only slightly less frequently than those 65+ (retirement age). This younger group is more apt than those 65+ to be weekly beer and spirits drinkers, while those 65+ are more likely to not drink spirits at all.
- ✓ Respondents who are 55+ and 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. The frequency of alcohol consumption generally seems to be a stronger influencer than substitution of one category for another.
- ✓ Beer and spirits consumption frequency among older Marginal wine drinkers differs greatly from that of Core wine drinkers.
 - Beer consumption frequency among Marginal wine drinkers aged 55-64 is closer to that of rare*/non-wine drinkers than to Core wine drinkers their age, while 55-64 year old Marginal wine consumers drink spirits less often than both Core wine drinkers and rare/non-wine drinkers their age.
 - Marginals aged 65+ drink both beer and spirits less often than Core wine drinkers and infrequent/non-wine drinkers who are 65 or older.
- These findings, along with data that shows an overall decrease in wine consumption among 55+ Marginals, and the fact that Marginals are split on preferring wine vs. other alcoholic beverages (discussed further on in this report) suggests that Marginals are less frequent alcohol consumers broadly rather than substituting other types of alcohol for wine.
- ✓ The majority of respondents aged 55+ are disinterested in trying cannabis, especially those aged 65+. Approximately one-quarter of 55+ respondents from cannabis-legal states consider themselves cannabis users.
- ✓ The majority of those 55+ reported no change to their wine consumption over the past couple of years, and among the remainder, more respondents increased their wine consumption than decreased it by a small margin.
 - The majority of 55 and older respondents who reported drinking less wine also reported drinking less beer and spirits. Among the small proportion of them who drink “other alcohol products,” the largest contingent also reported decreased consumption.

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

Key Learnings *(continued)*

- ✓ Survey results on preference and whether or not consumers like wine and why suggest that gaining ground for wine among rare/non-wine drinkers in the 55+ age cohort is a question of appealing to their taste.
 - Most rare/non-wine drinkers aged 55+ prefer some other kind of alcohol to wine. In fact, the top reason given for not drinking wine or not drinking it more often was not liking the taste. By contrast, the majority of Core wine drinkers in this age group prefer wine. Marginal wine drinkers were split fairly evenly between preferring wine and preferring another type of alcohol.
 - The majority of rare/non-wine drinkers reported they don't like wine, while the majority of Core wine drinkers like wine and drink it on more than just on special occasions. Again, 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.
- ✓ Comparing those aged 55-64 with those aged 65+, there was no indication of a major retirement or aging impact on wine consumption.
 - 65+ wine drinkers were more stable in their wine drinking and less apt to have increased or decreased their wine consumption, with slightly more increasing.
- There were no big differences in frequency of consumption among wine consumers aged 55-64 and those aged 65+, nor in types of wine consumed. However, those 65+ were significantly more likely to cite the appeal of wine with food as a reason to drink more wine.
- While somewhat more 55-64 year olds than the 65+ group increased wine consumption over the past couple of years, many of these were relative “newbies” to wine, increasing consumption from a low or nonexistent level.
- However, among the minority who were decreasing consumption, the amount of decrease was substantial. There were significant differences between the 55-64 and 65+ groups in reasons for decreasing, with those 65+ substantially more likely to be cutting back alcohol generally, while those 55-64 more likely to prefer other forms of alcohol.
- Although not a top response, health was consistently given as a reason for both increased and decreased wine consumption among those 55-64 and 65+, however, more often as a reason to increase consumption among both groups.



Survey Results: Respondents Aged 55+

Wine and Other Alcohol Consumption

- ✓ 70% of the total respondents aged 55+¹ consider themselves wine drinkers (defined as consuming wine at least once every 2-3 months). This rate is higher than the rate of wine consumption among total U.S. adults who drink alcohol at least once every 2-3 months (61%).²
 - Weekly wine consumption among 55-64 year olds (the youngest Baby Boomers) and those 65+ was at parity.
 - However, infrequent consumption was more prevalent among 55-64 year olds (17% drink wine less than every 2-3 months vs. 13% of those older) and monthly consumption more prevalent among those 65+.
 - Non-wine drinker rates were consistent between these two age groups.
- ✓ 55-64 year olds are more apt than those 65+ to be weekly beer and spirits drinkers. In fact, those 65+ are less likely to drink spirits at all.

¹All survey participants drink some type of alcohol at least once every 2-3 months.

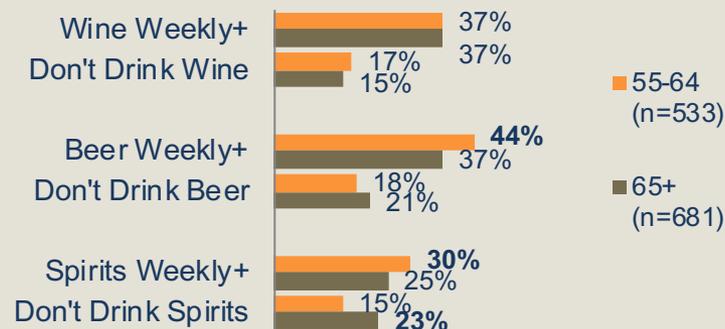
²Wine Market Council Annual Segmentation Study, 2019.

Wine Consumption Among Total Respondents (Aged 55+)*

	55+ (n=1214)	55-64 (n=533)	65+ (n=681)
More than once a week	24%	23%	24%
Once a week	13%	13%	12%
2-3 times a month	13%	10%	15%
Once a month	8%	8%	9%
Every 2-3 months	12%	11%	12%
Less than every 2-3 months ("rare")	14%	17%	13%
Non-wine drinker	16%	17%	15%

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

Wine, Beer, and Spirits Consumption Among Total Respondents (Aged 55+)



Wine and Other Alcohol Consumption (Continued)

- ✓ Those aged 55-64 who drink wine most frequently also drink beer and spirits most frequently. That is, Core wine drinkers (drink wine at least once a week) are more likely than Marginal and rare/non-wine drinkers to drink beer and spirits weekly.
 - Despite how often respondents aged 55-64 drink wine, they drink beer more frequently than spirits.
 - 55-64 year old rare/non-wine drinkers consume spirits more often than Marginal wine drinkers.
- ✓ Both Core wine drinkers AND rare/non-wine drinkers in the 65+ age group drink beer and spirits more often than Marginal wine consumers.
 - Again, despite how often respondents in this age group drink wine, they drink beer more frequently than spirits.
 - Compared to Core and Marginal wine drinkers, rare/non-wine drinkers are generally more likely to be beer drinkers and less likely to be spirits drinkers.

Wine Interaction with Beer & Spirits Aged 55-64

Wine consumption ---> frequency	Core (n=195)	Marginal (n=150)	Rare/Non-Wine Drinkers (n=188)
BEER Weekly+	54%	39%	37%
BEER 1-3 x month	21%	22%	26%
BEER less often	12%	18%	19%
Don't Drink Beer	14%	21%	19%
SPIRITS Weekly+	42%	17%	29%
SPIRITS 1-3 x month	26%	30%	21%
SPIRITS less often	20%	38%	32%
Don't Drink Spirits	12%	15%	18%

Aged 65+

Wine consumption ---> frequency	Core (n=249)	Marginal (n=226)	Rare/Non-Wine Drinkers (n=206)
BEER Weekly+	46%	22%	42%
BEER 1-3 x month	18%	28%	23%
BEER less often	14%	24%	19%
Don't Drink Beer	22%	26%	17%
SPIRITS Weekly+	31%	17%	25%
SPIRITS 1-3 x month	23%	20%	20%
SPIRITS less often	28%	40%	26%
Don't Drink Spirits	18%	23%	29%

Wine and Other Alcohol Consumption (Continued)

- ✓ When respondents aged 55+ who drink beer were asked what category of beer they drink at least once a month, domestic beer led domestic craft beer and imports.
 - Those 55-64 were more apt than those 65+ to report monthly consumption of imported beer.
 - Rare/non-wine drinkers behave more like Core wine drinkers when it comes to domestic beer, consuming it monthly at higher rates than Marginals. When it comes to imported and craft beer, monthly consumption was highest among Cores, followed by Marginals, and then rare/non-wine drinkers.

Monthly+ Beer Consumption Among Beer Drinkers by Category & Age (Aged 55+)

Drink at least 1 x month...	55+ (n=786)	55-64 (n=364)	65+ (n=422)
Domestic beer	66%	66%	67%
Imported beer	43%	48%	38%
Domestic craft beer	37%	40%	35%

Monthly+ Beer Consumption by Category vs. Wine Consumption Frequency (Base: those who drink beer and are age 55+)

Drink at least 1 x month...	Core wine drinker (n=290)	Marginal wine drinker (n=220)	Rare/ non-wine drinker (n=276)
Domestic beer	68%	57%	72%
Imported beer	57%	41%	29%
Domestic craft beer	50%	39%	22%

Wine and Other Alcohol Consumption (Continued)

- ✓ When respondents aged 55+ who drink spirits were asked what category of spirits they drink at least once a month, cocktails led, closely followed by straight spirits. Only about one in ten drink premixed, ready-to-drink cocktails.
 - There were no differences of note between the monthly cocktail, ready-to-drink cocktail, or straight spirit consumption of 55-64 year olds and those 65+.
 - In general, Core wine drinkers consume cocktails and straight spirits significantly more often than Marginal wine drinkers, and directionally more often than rare/non-wine consumers.
 - Core wine drinkers are significantly more likely than all others to drink ready-to-drink cocktails on a monthly basis.
- ✓ The combination of higher rates of domestic beer consumption and spirits consumption among rare/non-wine drinkers suggests some replacement effect vs. wine among this segment.

Monthly+ Spirits Consumption Among Spirits Drinkers by Category & Age (Aged 55+)

Drink at least 1 x month...	55+ (n=642)	55-64 (n=304)	65+ (n=338)
Cocktails	49%	52%	46%
Straight spirits	44%	44%	43%
Premixed, ready-to-drink cocktails	10%	11%	9%

Monthly+ Spirits Consumption by Category vs. Wine Consumption

Frequency (Base: those who drink spirits and are age 55+)

Drink at least 1 x month...	Core wine drinker (n=255)	Marginal wine drinker (n=167)	Rare/ non-wine drinker (n=220)
Cocktails	55%	41%	48%
Straight spirits	49%	40%	41%
Premixed, ready-to-drink cocktails	14%	6%	8%

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” were asked which beverages from the list at right they drink at least once a month.

- ✓ Cider and wine-based drinks are consumed most frequently, followed by hard tea (by about one-quarter of respondents), and then hard seltzer (by about one-fifth of respondents).

Monthly+ Consumption by Type among Those Who Drink “Other Alcohol”

(Base: those who drink “other” alcohol products and are age 55+)

Drink at least 1 x month...	55+ (n=160)	55-64 (n=103)	65+* (n=57)
Cider	45%	47%	42%
Wine-based drinks (e.g., sangria or spritzers)	41%	39%	44%
Hard tea	28%	28%	26%
Hard seltzers	19%	20%	16%
Mead	5%	6%	4%

*Caution: small base size.

Cannabis Usage

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

- ✓ One-quarter of those 55+ reported using cannabis., while the majority are not interested in trying it. Disinterest was significantly more often the sentiment of those 65+ compared to 55-64 year olds.
- ✓ Overall cannabis usage was consistent across Core wine drinkers, Marginal wine drinkers, and rare/non-wine drinkers. However, rare/non-wine drinkers had a higher rate of recreational use when compared to Core wine drinkers.

Cannabis Consumption Among Total Respondents (Aged 55+)

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

	55+ (n=256)	55-64 (n=119)	65+ (n=137)
Consume Cannabis (net)	25%	29%	22%
Recreational or both recreational/medical	19%	24%	15%
Medical only	6%	5%	7%
Interested in trying	9%	11%	7%
Not interested	66%	60%	71%

Cannabis Consumption by Wine Consumption Frequency (Aged 55+)

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

	Core (n=93)	Marginal (n=82)	Rare/ Non-wine drinkers (n=81)
Consume Cannabis (net)	22%	26%	30%
Recreational or both recreational/medical	13%	22%	25%
Medical only	9%	4%	5%
Interested in trying	13%	7%	5%
Not interested	66%	67%	65%

Wine Consumption

- ✓ Thinking of all the wine that wine consumers drink, red and white wine makes up about three-quarters of the reported wine that respondents aged 55+ consume, with more red wine consumed than white wine.
 - Males aged 55+, on average, drink a larger proportion of red wine than women (50% vs. 39% among 55-64 year olds and 56% vs. 38% among 65+). Furthermore, 36% of males reported three-quarters or more of the wine they drink is red vs. 21% of women.
 - Women in both age segments drink a larger proportion of their wine in sparkling form on average than men (14% vs. 8% among 55-64 year olds and 11% vs. 6% among 65+).
 - Consistent between the 55-64 and 65+ age segments is a larger proportion of red wine consumed by Cores vs. Marginals, and a larger proportion of sparkling wine consumed by Marginals vs. Core.

Average Percentage of Total Wine Consumed by Wine Drinkers by Color (55+)

	55+ (n=820)	55-64 (n=345)	65+ (n=475)
Red	46%	43%	48%
White	32%	31%	33%
Rosé	12%	14%	11%
Sparkling	10%	12%	8%
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., including those who drink less often than every 2-3 months) shows that approximately half of those aged 55+ reported unchanged wine consumption vs. a couple of years ago. Those 65+ were moderately more likely than 55-64 year olds to report consistent consumption.
- ✓ There was an slight positive net change (% drinking more minus % drinking less) among those 55+. Overall, increased consumption was more prevalent among 55-64 year olds.
 - It is important to note that most respondents who reported drinking more wine weren't drinking wine or only consumed it rarely a couple of years ago.
- ✓ In both the 55-64 and 65+ age groups, results showed more Marginal wine drinkers decreasing than increasing wine consumption, but a net increase among Cores.

Change in Wine Consumption vs. a Couple of Years Ago (55+)

	55+ (n=1020)	55-64 (n=440)	65+ (n=580)
Drinking more wine	19%	22%	17%
Drinking less wine	12%	12%	12%
Drinking about the same	50%	45%	53%
Drink wine less than once every 2-3 months <i>(were not asked question)</i>	20%	22%	18%
% drinking "more" who drank wine <once every 2-3 month a couple of years ago*	14%	19%	10%

*Data sourced from another question, in which those "drinking more" were asked how frequently they consumed wine a couple of years ago.

Consuming More Wine

- ✓ There were four top reasons given for consuming more wine compared to a couple of years ago. Approximately half are drinking more wine because they have an affinity for drinking wine with food (especially among those 65+), have acquired a taste for wine, have found more wines they like, and/or consider wine good for their health.
- ✓ Just under one-third are drinking more wine as a result of choosing it over another beverage.
- ✓ About one-fifth are drinking more wine based on the drinking habits of their peer group or spouse/partner, or because they are socializing more.
- ✓ Having more money is the reason the fewest respondents gave for increased consumption. Nonetheless, it was a reason more often given by 55-64 year olds than by those 65+.
- ✓ Nearly half the respondents attributed their increase in wine consumption to an increase wine drinking occasions, although more than a third did so by increased their number of wine drinking occasions as well as drinking more per occasion. Those 55-64 and 65+ did not differ on this measure.

Why Drinking More Wine (55+)

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

	55+ (n=195)	55-64 (n=97)	65+ (n=98)
I like wine with food	52%	43%	61%
Acquired a taste	51%	46%	56%
Found more wines I like	47%	47%	46%
Good for your health	47%	45%	48%
Chosen to drink wine over other beverages	30%	33%	28%
Spouse/partner drinks wine	19%	19%	19%
Go out more and socialize	19%	17%	20%
Learned more about/became exposed to wine	19%	16%	21%
My friends drink wine	17%	17%	18%
More packages types/sizes available	11%	13%	8%
Have more money to spend on wine	9%	14%	4%

How Drinking More Wine (55+)

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

	55+ (n=195)
Drinking more per occasion	24%
Increased number of occasions	46%
Both	31%

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. It should be noted that in the 55+ age group the proportion of those drinking more were in the minority, as half reported drinking the same amount of wine as they did a couple of years ago.

- ✓ The greatest gains were in those who moved into the more-than-once-a-week consumption category.
 - Gains were greater among those 65+, as more of those 65+ moved into this category than 55-64 year olds (71% vs. 56%).
- ✓ For 55-64 year olds, the greatest movement was among respondents who previously drank wine monthly or less often. Among those 65+ the greatest movement was from once-a-week as well as monthly wine drinkers.

Current Wine Consumption Frequency vs. a Couple of Years Ago Among those Drinking More Wine (55+)

Wine consumption ---> frequency	Couple of years ago	Currently	% pt. Shift
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Aged 55-64 (n=97)

More than once a week	11%	56%	+45
Once a week	20%	25%	+5
1-3 times a month	36%	17%	-19
Every 2-3 months	14%	2%	-12
Less often	19%	-	-19

Aged 65+ (n=98)

More than once a week	12%	71%	+59
Once a week	26%	10%	-16
1-3 times a month	40%	16%	-24
Every 2-3 months	12%	2%	-10
Less often	10%	-	-10

Consuming Less Wine

- ✓ The top reason given for drinking less wine was an overall decrease in alcoholic beverage consumption. A preference for other types of alcohol was the second most frequently mentioned reason, followed by financial concerns and the expense of wine.
 - Although base sizes for respondents aged 55-64 and 65+ who are drinking less wine were small, the oldest are more likely to be drinking less alcohol in general (59% 65+ vs. 45% 55-64), and those 55-64 to prefer another type of alcoholic beverage (31% vs. 18%).
- ✓ Health was cited more often as a positive reason to drink more wine (47% of those 55+) than a reason to drink less wine (16% of those 55+).
 - Again, although base sizes were small, those 65+ were significantly more likely to drink less wine because they think it isn't part of a healthy lifestyle (22% vs. 8% of those 55-64). There was no difference in the proportion of 55-64 and 65+ respondents who cited health as a reason to drink more wine.
- ✓ Decreases in consumption were most often attributed to a decrease in wine consumed per occasion among 55-64 year olds. Those 65+ were more likely to have decreased their wine drinking occasions than the amount of wine they drink per occasion.

Why Drinking Less Wine (Aged 55+)

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

	55+ (n=119)
Drinking less alcohol in general	53%
Prefer other types of alcohol	24%
<u>Expenses/Money concerns (net)</u>	<u>19%</u>
Don't have as much money for wine	19%
Wine too expensive vs. other alcohol	5%
Don't think wine is part of a healthy lifestyle	16%
Health issues require reducing alcohol	15%
Alcohol affects me more than it used to	14%
Don't socialize much	13%
Spending more time with people who don't drink wine	6%
Hard to choose/find wine I might like	3%

How Drinking Less Wine (Aged 55+)

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

	55+ (n=119)	55-64 (n=51)*	65+ (n=68)*
Drinking less per occasion	26%	37%	18%
Decreased number of occasions	35%	31%	38%
Both	39%	31%	44%

*Caution: small base size.

Consuming Less Wine *(Continued)*

- ✓ The greatest shift among those 55+ who reporting drinking less wine was a large decrease among those drinking more often than once a week.
 - Shifts were primarily from drinking wine weekly+ to drinking wine monthly, with a significant minority decreasing their consumption to every 2-3 months.

Current Wine Consumption Frequency vs. a Couple of Years Ago Among those Drinking Less Wine (Aged 55+, n=119)

Wine consumption ---> frequency	Couple of years ago	Currently	% pt. Shift
More than once a week	43%	10%	-33
Once a week	21%	13%	-8
1-3 times a month	32%	40%	-8
Every 2-3 months	4%	29%	+25
Less often	-	8%	+8

Consuming Less Wine *(Continued)*

- ✓ Among those 55+, the majority of respondents who are drinking less wine are also drinking less beer (58%) and less spirits (55%). And among the small proportion of them who drink “other alcohol,” the largest contingent was also reported decreased consumption. (The majority of 55+ wine drinkers who have decreased their wine consumption do not drink other alcohol products such as hard seltzer, hard cider, etc., at all.)
- ✓ Base sizes for respondents aged 55-64 and 65+ 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 55+)

	55+ (n=119)
BEER	
Drinking more	12%
Drinking less	58%
Drinking about the same	12%
Do not drink beer	18%
SPIRITS	
Drinking more	10%
Drinking less	55%
Drinking about the same	17%
Do not drink spirits	18%
OTHER ALCOHOL PRODUCTS	
Drinking more	3%
Drinking less	24%
Drinking about the same	13%
Do not drink other alcohol products	60%

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 the majority of respondents who are 55 and older were most apt to maintain their current consumption patterns, as noted earlier.
 - Respondents 55-64 were less likely to maintain their current rate of consumption when compared to those 65+, and more likely to increase their consumption.

Shift in Wine Consumption Frequency Categories (55+)

(Base: total respondents)

	55+ (n=820)	55-64 (n=345)	65+ (n=475)
+2 consumption frequency levels	14%	17%	12%
+1 consumption frequency levels	10%	12%	9%
No change	62%	57%	65%
-1 consumption frequency levels	9%	9%	8%
-2 consumption frequency levels	6%	6%	6%

Reasons for Rarely/Never Drinking Wine

- ✓ Just over one-third of the rare/non-wine drinker survey participants aged 55+ rarely drink wine or do not drink it at all because they don't like the taste.
- ✓ Second tier reasons were that wine doesn't fit their personality or style, and they find it hard to find or choose wine they might like.
- ✓ There were no significant differences in the reasons given by 55-64 year olds and those 65+.

Reasons for Rarely or Never Drinking Wine (Aged 55+) (Base: rarely or never drink wine)

	55+ (n=478)
Don't like the taste	34%
Doesn't fit my personality or style	20%
Hard to choose wines might like	16%
Don't feel well after drinking wine	11%
Too expensive	9%
Friends don't drink wine	8%
Never really tried it	2%
Too complicated	2%
Too high in alcohol	2%

Wine Preference Among Rare/Non-Wine Drinkers

- ✓ Nearly all rare/non-wine drinkers aged 55+ prefer some other alcoholic beverage to wine.
 - Marginal wine drinkers are fairly evenly split between preferring wine and some other alcoholic beverage with marginally more respondents preferring wine. In contrast, approximately one-quarter of Core wine drinkers prefer another type of alcohol over wine.
 - Of note is that 55-64 year old Cores are less likely to prefer wine than those 65+ (66% vs. 77%), although the majority still prefer wine.
- ✓ When asked if they “like” wine, 61% of rare/non-wine drinkers responded that they don’t like wine, more than half of which “really don’t like wine.”
 - Despite most wine drinkers in this age group liking wine, one-third (32%) are still only special occasion wine drinkers. Nearly half of Marginal wine drinkers in aged 55+ only drink wine on special occasions.
- ✓ These results suggest that the battle for wine’s share of consumption is very different between Marginal wine drinkers and rare/non-wine drinkers. The vast majority of Marginals like wine, so the battle is centered around availability and appropriateness by occasion. For the

Wine Preference and Degree Like Wine by Wine Consumption Frequency (Aged 55+)

Wine consumption --->	Core (n=444)	Marginal (n=376)	Rare/Non-Drinker (n=394)
Prefer wine to other types of alcohol	72%	52%	5%
Prefer some other kind of alcohol over wine	28%	48%	95%
Like wine – don’t only drink on special occasions	79%	46%	6%
Like wine but only drink on special occasions	18%	48%	25%
Don’t like wine but drink occasionally	2%	4%	24%
Really don’t like wine	<.5%	<.5%	37%
Not enough experience to have an occasions	<.5%	1%	8%

rare/non-wine drinker, finding the right wine for their taste may be more important.



Appendix

Demographic Differences Aged 55-64 vs. 65+

There were some moderate but significant demographic differences between 55-64 years old respondents and those who are 65+.

- ✓ The oldest respondents skewed male, white, and are more likely to have earned an advanced degree, to own a home and to be retired.
- ✓ One-third of those 55-64 are retired, while more than a third are working full time.
- ✓ The majority of those 65+ consider their financial situation on par with what it was a few years ago. 55-64 year olds were significantly less apt than their older counterparts to report a stable financial situation (although nearly one-half did), and were more likely to report improved finances.

Total Survey Respondents Aged 55+

	55+ (n=1214)	55-64 (n=533)	65+ (n=681)
Male	54%	42%	62%
Female	46%	58%	38%
Non-Hispanic Caucasian	81%	74%	86%
Hispanic	7%	10%	5%
Black	9%	11%	7%
Asian	1%	2%	1%
Mixed Race/Other designation	2%	3%	1%
High school or less	31%	32%	30%
Some college/2-yr degree	32%	34%	31%
4-year college degree	20%	24%	18%
Post graduate work or degree	17%	10%	22%
Financial situation improved	32%	36%	28%
Financial situation same	52%	47%	56%
Financial situation worse	16%	17%	16%
Live alone	28%	26%	29%
Live with roommates	72%	74%	71%
Own home	76%	69%	81%
Rent home	23%	29%	18%
Other	1%	2%	1%
Mean annual income (including from all sources and comingled funds)	\$72K	\$70K	\$74K
Retired	61%	34%	83%
Employed full time	20%	36%	8%
Employed part time	9%	9%	8%
Multiple part time jobs	<.5%	<.5%	0%
Student	<.5%	<.5%	0%
Full-time homemaker	4%	8%	1%
Currently not working	4%	8%	1%

Demographic differences by Wine Consumption Frequency

Within the 55+ age cohort, there were a few demographic differences among respondents who drink wine with varying frequencies.

- ✓ The rare/non-wine drinker cohort skewed male, while the wine drinker cohorts were gender balanced.
- ✓ Those who drink wine rarely or never are less educated, have lower incomes, and are less likely to own a home than wine drinker respondents.
- ✓ Core wine drinkers within this age group are more educated and have higher incomes than their Marginal wine consuming counterparts. Marginals were more likely to assess their financial situation as “worse” than a few years ago.

Total Survey Respondents Aged 55+

Wine consumption frequency --->	Core (n=444)	Marginal (n=376)	Rare/ Non-Drinker (n=394)
Average Age	66	67	65
Male	51%	50%	60%
Female	49%	50%	40%
Non-Hispanic Caucasian	82%	77%	82%
Hispanic	7%	9%	6%
Black	7%	12%	8%
Asian	3%	<.5%	1%
Mixed Race/Other designation	1%	2%	2%
High school or less	24%	27%	43%
Some college/2-yr degree	29%	34%	35%
College degree	47%	39%	22%
Financial situation improved	35%	28%	31%
Financial situation same	52%	53%	51%
Financial situation worse	13%	19%	18%
Live alone	28%	25%	30%
Live with others	73%	75%	70%
Own home	81%	76%	69%
Rent home	17%	23%	30%
Other	1%	1%	1%
Mean annual income (including from all sources and comingled funds)	\$85K	\$73K	\$58K
Retired	63%	61%	59%
Employed full time	21%	18%	20%
Employed part time	7%	10%	9%
Multiple part time jobs	<.5%	<.5%	0%
Student	0%	<.5%	<.5%
Full-time homemaker	5%	4%	4%
Currently not working	2%	4%	6%



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.