



# Moderation and wellness trends in wine



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Wine



Market  
COUNCIL

# Q: Why the shift towards moderation and wellness?

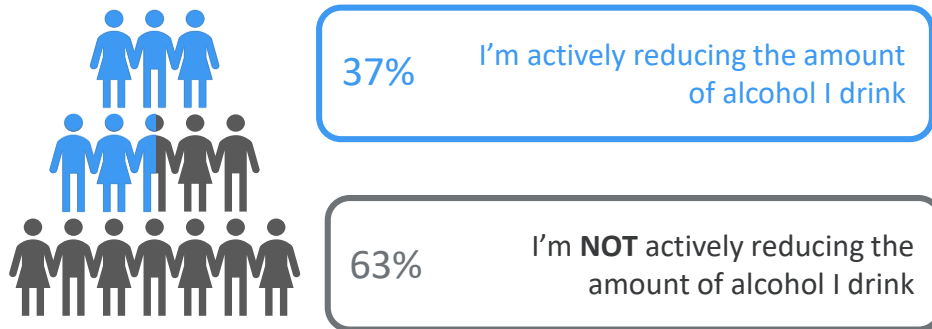
God bless behavioral  
economics....



**Moderation**

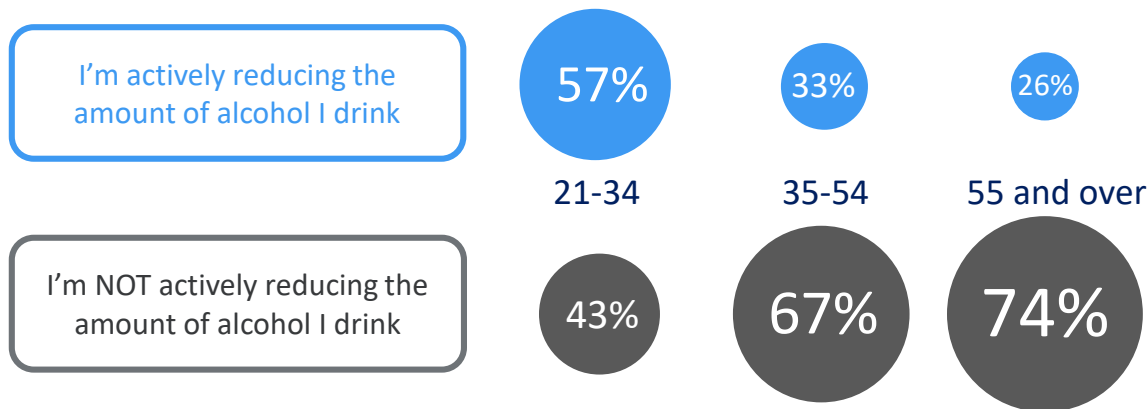
## Are US wine drinkers moderating their alcohol consumption?

Base = US regular wine drinkers



## Who is moderating their alcohol consumption?

Base = US regular wine drinkers



## How are US wine drinkers moderating their alcohol consumption?

Base = US regular wine drinkers



42%

I'm actively reducing by choosing  
lower alcohol options

58%

I'm actively reducing by choosing  
not to drink alcoholic beverages

## Who is moderating their alcohol consumption and how?

Base = US regular wine drinkers



I'm actively reducing by choosing  
lower alcohol options

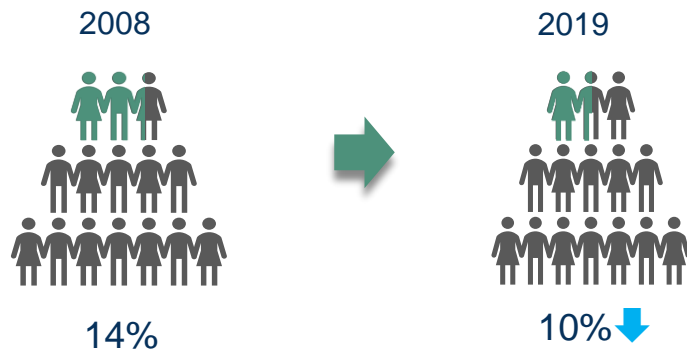


I'm actively reducing by choosing  
not to drink alcoholic beverages



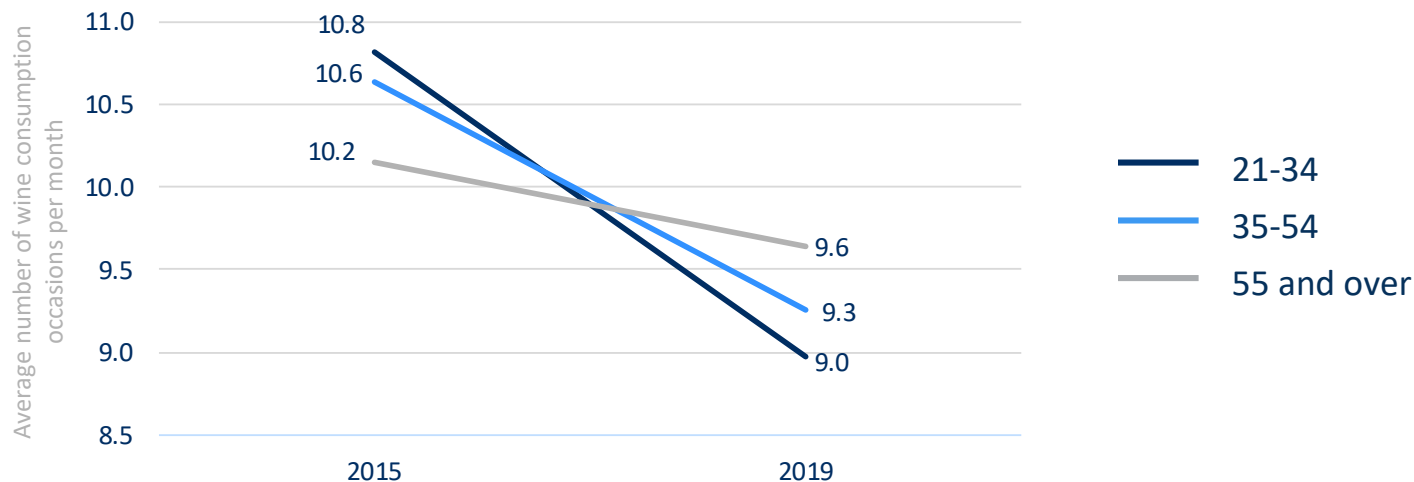
## Proportion of regular wine drinkers who drink wine **most / every day**

Base = US regular wine drinkers



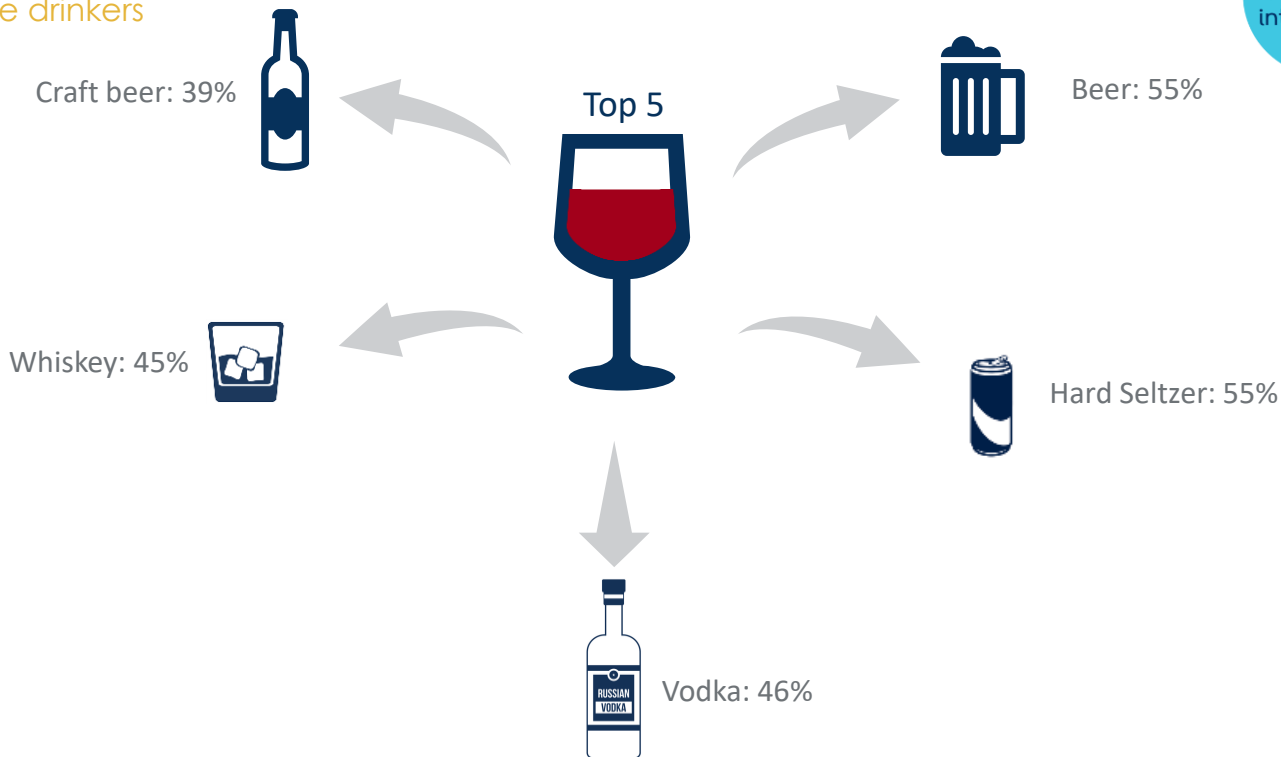
## Wine consumption frequency average by age: Tracking

Base = US regular wine drinkers



## What are US wine drinkers switching to?

Base = US regular wine drinkers



## Cannabis attitudinal statements by age

Base = US regular wine drinkers

*I am using cannabis products*

21-34

23%

35-54

20%

55 and over

7%

*I think cannabis products are a  
good alternative to alcoholic  
beverages*

21-34

29%

35-54

22%

55 and over

8%

**Free-from**

BUT KINGY,  
KNORR VEGGIE STOCKS  
HAVE CHANGED  
THE GAME

# AUBERGINE KATSU CURRY

PREPARE TO BE WINED AND DINED

**CHEAT ON MEAT**  
WITH KNORR VEGGIE STOCKS













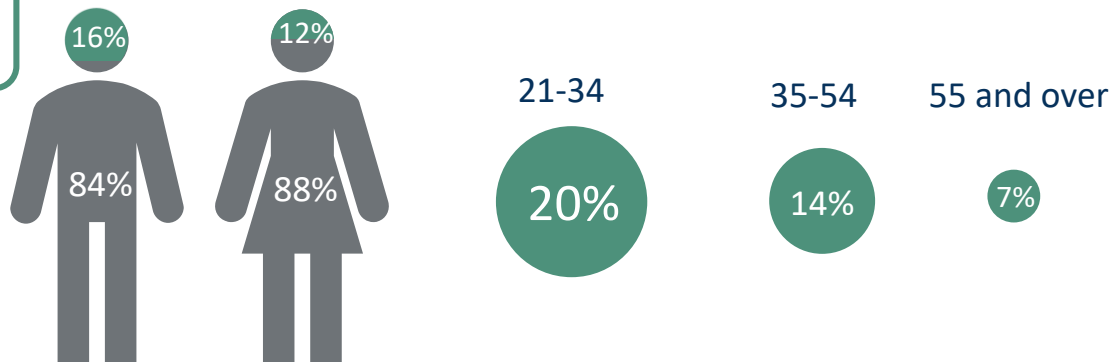


## Who is living a 'free-from lifestyle'?

Base = US regular wine drinkers



*I actively eat more / exclusively  
vegetarian or vegan food*



## Market opportunity index for alternative wine types

Base = US regular wine drinkers



Type of wine	2019 opportunity index
1st Organic wine	51.3
2nd Sustainably produced wine	46.9
3rd Environmentally friendly wine	46.9
4th Fairtrade wine	44.0
5th Sulphite free wine	42.2
6th Preservative free wine	42.0
7th Orange / skin contact wine	40.6
8th Carbon neutral winery	39.3
9th Biodynamic wine	34.1
10th Vegetarian wine	33.9
11th Vegan wine	32.5
12th Lower alcohol wine	31.6
13th Non-alcoholic wine	26.5

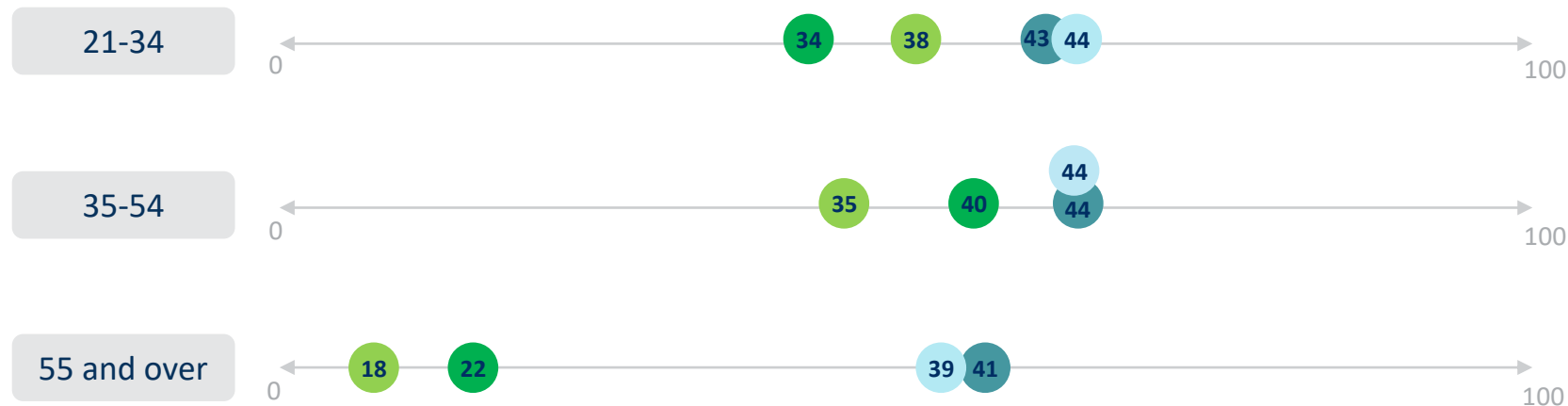
# Market opportunity index for alternative wine types: By age

Base = US regular wine drinkers



- Preservative free wine
- Sulphite free wine
- Vegetarian wine
- Vegan wine

Opportunity index (0-100):



## *Driving success in wellness and moderation*

Positive not negative: gain-framed messaging

People like you: social signalling

Feel not fact: service both self and external

*‘White Claw is always the first drink that goes at our parties now. It’s chosen before beer as it tastes nice, is refreshing, low-calorie, but just as importantly, it doesn’t smell and get sticky like beer if it gets spilt!’*

Social Newbie, M 23, NY