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**WINE MARKET COUNCIL RELEASES RESULTS OF STUDY ON THE ROLE OF WINE IN A WELLNESS LIFESTYLE
Study Conducted in Partnership with Research Industry Leader, NielsenIQ**

NAPA VALLEY, CA, February 16, 2020 — In partnership with NielsenIQ, the Wine Market Council (<https://winemarketcouncil.com/>) just completed a study on the role of wine in a Wellness Lifestyle. The primary goal of the research was to better understand how wine is perceived as compared to other beverage alcohol categories such as beer, spirits, and hard seltzers. Additional insights were gained on the interaction between the categories, the role of 'dry months,' and the importance of social circles and occasions. "As a natural, sustainable product, we believe wine can be part of a Wellness Lifestyle," said Dale Stratton, Wine Market Council President. "This research was conducted to help us, and the wine industry we serve, understand if consumers share that perception."

Three categories of wellness were defined, based on what consumers considered important to a healthy lifestyle. The first and largest group is activity focused, rating exercise, stress management, and time with family as most important for wellness. The second are consumers whose primary focus is on diet and ingredients with an orientation to reducing sugar, calories, and carbs. The third and smallest group includes those who are 'alcohol-concerned,' and focus on reducing the amount of alcohol consumed or seek lower alcohol products. These last two groups also value exercise and social activities but differ significantly on the important factors in food and beverages consumed.

"We're tempted to ascribe consumer choices to the 'trend du jour,' be it reduced calories or cutting back alcohol. But in fact, the consumption trends we're seeing now are a complicated mix of health perceptions, taste and social influences, magnified by the pandemic," explained Christian Miller, Wine Market Council Director of Research. "Wellness factors that are important vary person to person and the products that are credible depend on the attribute being stressed. The good news for wine is that it isn't particularly vulnerable on any one factor and so far, has kept its position as the alcoholic beverage most compatible with a wellness lifestyle in general. However, we are at the start of a very dynamic phase in this area, and consumers are going to be bombarded with a lot of new products and claims, so we need to keep an eye on this topic."

Roughly half of all beverage alcohol consumers do not associate alcoholic beverages with features of a wellness lifestyle. However, of those who do, two thirds perceive wine as an overall healthier choice compared to hard seltzer, spirits and beer. Hard seltzer does better with diet/ingredient-focused consumers and is seen as hitting the mark for lower calories, carbs and sugar. Those whose wellness concerns were focused on diet and ingredients were less likely to be cutting back on hard seltzer, while those whose concerns were alcohol-focused were more likely to be cutting back on spirits and less likely hard seltzer. Core wine consumers ranked reducing calories and artificial ingredients, and eating more plant-based foods, as higher priorities than less frequent wine consumers, who were in turn higher than non-wine drinkers.

"NielsenIQ is pleased to partner with The Wine Market Council on this research, as it is relevant given the overarching consumer trends, and timely given the ever-changing dynamics in the world today," said Peggy Gsell, Client Business Partner, NielsenIQ. "Core consumer trends that were growing before the pandemic continued to grow, and in many cases accelerated, throughout 2020. Health and wellness is the number one concern among U.S. consumers and is a key trend that translates into unique product offerings and marketing communication. For beverages specifically, we have

seen several better-for-you products enter the marketplace, a resurgence of low alcohol and non-alcohol offerings, and a heightened transparency in ingredient claims."

The recent study addresses additional trends such as alcoholic beverage consumption (decreasing overall) and the reasons for it, the leading one being the decline in social situations where consumers might drink, no doubt correlating with the pandemic. A general dissatisfaction with drinking was the second reason for decline in consumption, while third were factors related to dietary and eating habits. Also of note: Most consumers drink and purchase alcoholic beverages across multiple categories, rather than focusing the majority of their consumption on a single category such as beer or wine.

Another finding of the research was the association between hard seltzer's growth and reducing wine consumption, which was weak. While hard seltzer picked up share from those consumers reducing wine consumption, among wine drinkers overall more reported drinking more wine and hard seltzer than those who said they were drinking less wine and more hard seltzer. The big loser in this equation appears to be beer, ceding purchases to both wine and hard seltzers.

About Wine Market Council Research

The Wine Market Council conducts research on the attitudes and behaviors of U.S. wine consumers, measuring and exploring industry trends from the consumer perspective. It also provides national wine consumption benchmarks by various segments of the population. The council's research does not track individual brands or companies, nor does it measure sales in the wholesale or retail tier or direct to consumer sector, nor does it score wines in any way. The proprietary research is provided to association members only.

About The Wine Market Council

The Wine Market Council was established in 1994 as a non-profit (501c6) trade association whose mission is to provide our members forward looking market research on the ever changing U.S. wine consumer's buying habits, attitudes, and motivations. More information can be found at WineMarketCouncil.com.

About Nielsen

Nielsen Holdings plc (NYSE: NLSN) is a global measurement and data analytics company that provides the most complete and trusted view available of consumers and markets worldwide. Nielsen is divided into two business units. Nielsen Global Media provides media and advertising industries with unbiased and reliable metrics that create a shared understanding of the industry required for markets to function. NielsenIQ (formerly known as Nielsen Global Connect) provides consumer packaged goods manufacturers and retailers with accurate, actionable information and insights and a complete picture of the complex and changing marketplace that companies need to innovate and grow.

Our approach marries proprietary Nielsen data with other data sources to help clients around the world understand what's happening now, what's happening next, and how to best act on this knowledge.

An S&P 500 company, Nielsen has operations in nearly 100 countries, covering more than 90% of the world's population. For more information, visit www.nielsen.com.