

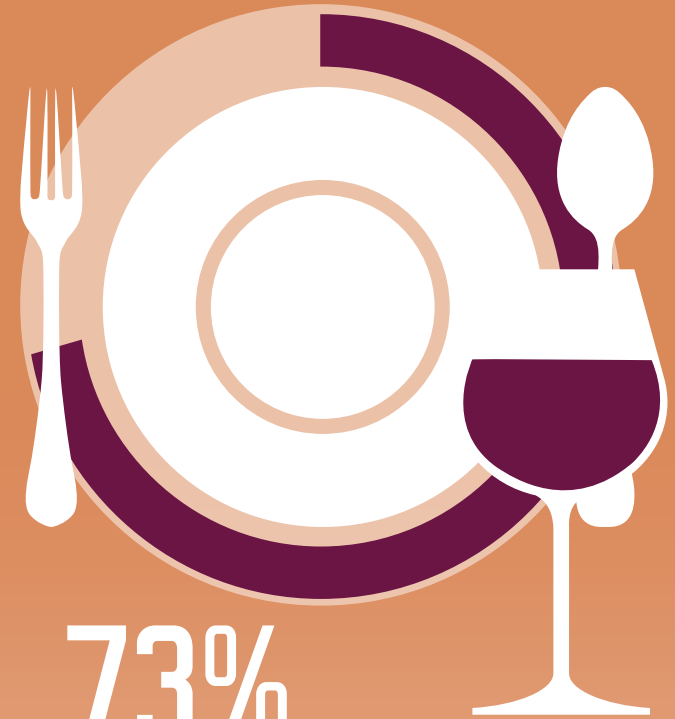


# 2018 CONSUMER ALCOHOL BEVERAGE SURVEY

# OCCASION DEFINES THE DRINK

66%

OF CONSUMERS SAY THEY CHANGE THEIR DRINK DEPENDING ON WHERE THEY ARE AND WHAT THEY ARE DOING



73%

OF WINE DRINKERS SAY THAT WINE PAIRS BEST WITH MEALS MORE THAN ANY OTHER BEVERAGE



2X

CONSUMERS ARE NEARLY TWO TIMES MORE LIKELY TO TRY SOMETHING NEW IN A RESTAURANT OR BAR THAN IN RETAIL STORES

# WHY SO SERIOUS?



82%



OF WINE DRINKERS  
SAY WINE SHOULD BE  
FUN AND ENJOYABLE

34%

OF WINE DRINKERS SAY THAT  
OTHER WINE DRINKERS TAKE  
THEMSELVES TOO SERIOUSLY



38%

OF WINE DRINKERS SAY  
THEY SOMETIMES PUT  
ICE IN THE GLASS IF THE  
WINE IS NOT COLD ENOUGH



# IT'S ALL ABOUT THE EXPERIENCE



48%

OF ALCOHOL BEVERAGE SHOPPERS SAY THEY TEND TO BUY FOOD/BEVERAGES THAT APPEAL TO THEM IN THE MOMENT AT THE STORE



17%

OF ALL WINE CONSUMERS ENJOY VISITING WINERIES FREQUENTLY, WITH AN EVEN HIGHER NUMBER OF FINE WINE CONSUMERS AT 35%



43%

OF WINE SHOPPERS SAY THAT STORE TASTINGS HAVE A STRONG INFLUENCE ON WHAT THEY BUY

73%

OF WINE DRINKERS SAY THEY WOULD ENJOY A WINE TASTING CLASS



# COCKTAIL CULTURE



**69%**

OF SPIRITS DRINKERS SAY THAT MAKING CRAFT COCKTAILS IS A FUN WAY TO EXPERIMENT

**60%** OF SPIRITS DRINKERS SAY THAT CLASSIC COCKTAILS SUCH AS MANHATTANS AND MARTINIS ARE STYLISH AGAIN

**17%**

ARE DRINKING MORE EXPENSIVE OR PREMIUM SPIRITS THAN THEY USED TO

# THE LANDSCAPE OF LUXURY



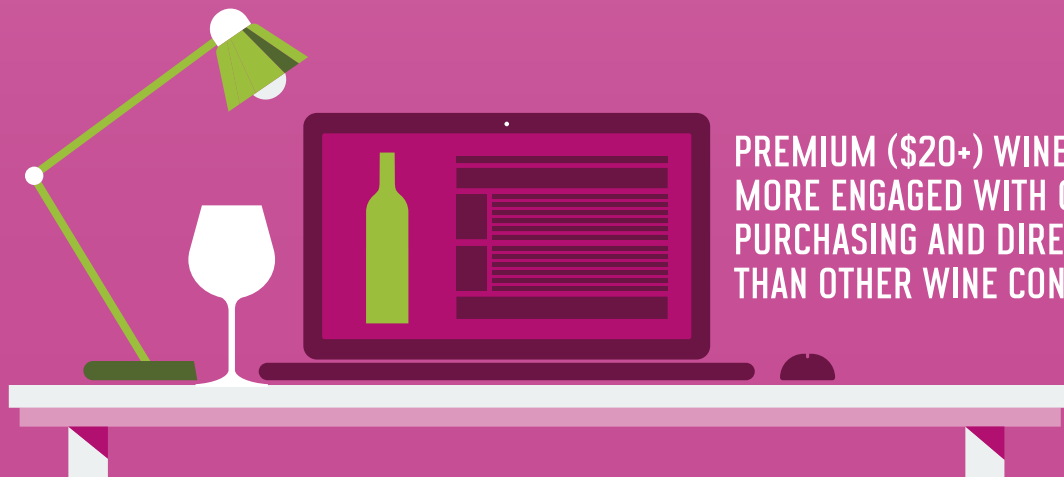
**PREMIUM (\$20+) WINE DRINKERS SWITCH BETWEEN ALL PRICE POINTS. MOST HIGH-END DRINKERS WILL ALSO DRINK AT LOWER PRICE POINTS**

— AND —

**PREMIUM (\$20+) WINE DRINKERS ARE MORE EXPLORATORY, MORE KNOWLEDGEABLE, AND MORE SOCIAL IN THEIR CONSUMPTION**



**AT ALL INCOME LEVELS, MORE WINE DRINKERS ARE SPENDING THEIR DISCRETIONARY INCOME ON LUXURY WINES**



**PREMIUM (\$20+) WINE DRINKERS ARE MORE ENGAGED WITH ONLINE WINE PURCHASING AND DIRECT TO CONSUMER THAN OTHER WINE CONSUMERS**

# WINE THROUGH THE GENERATIONS

OLDER CONSUMERS TEND TO ENJOY WINE MORE FREQUENTLY (2 OR MORE OCCASIONS PER WEEK) THAN THEIR YOUNGER COUNTERPARTS



NEW INTEREST IN FINE WINES USUALLY STARTS YOUNG AT AGES 21 – 30, DRIVEN BY HAVING AN “AHA!” WINE MOMENT OR A FRIEND INTRODUCING THEM TO THE WORLD OF FINE WINE



MILLENNIALS ARE DRINKING ALL TYPES OF ALCOHOL AND HAVE BROADER REPERTOIRES THAN OLDER CONSUMERS



# THE CURRENT STATE OF TASTE

WINE DRINKERS WHO PREFER  
WINE WITH A LITTLE SWEETNESS

60%

ROSÉ CONTINUES  
TO GROW AS A YEAR-ROUND  
WINE OF CHOICE

1 IN 5

WINE CONSUMERS HAVE  
ENJOYED A GLASS OF ROSÉ  
IN THE LAST MONTH

LIGHT AND  
APPROACHABLE  
WINES, SUCH AS  
**PROSECCO,  
MOSCATO, AND  
SPARKLING**  
ARE MORE POPULAR  
THAN EVER BEFORE



# SHOPPING MADE SIMPLE

65%

OF ALCOHOL BEVERAGE SHOPPERS SAY THAT SPEED AND EFFICIENCY DRIVES THEIR SHOPPING EXPERIENCE



39%

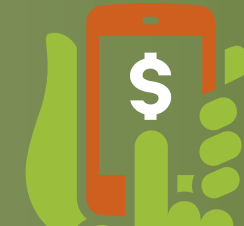
OF WINE SHOPPERS SAY THAT SHOPPING FOR WINE CAN BE CONFUSING



# THE E-COMMERCE EFFECT

40%

OF ALCOHOL BEVERAGE SHOPPERS SAY THEY ARE LIKELY TO SHOP FOR ALCOHOL BEVERAGES ONLINE IN THE NEXT YEAR



21%

OF ALCOHOL BEVERAGE SHOPPERS SAY THEY HAVE PURCHASED ALCOHOL BEVERAGES ONLINE



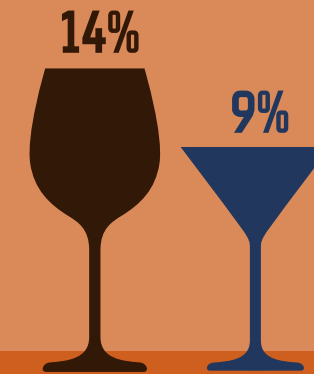
FREE SHIPPING IS THE SINGLE MOST IMPORTANT ATTRIBUTE FOR ONLINE SHOPPING, MORE SO THAN PRICE OR ASSORTMENT

# WHEN PEOPLE SHOP ONLINE VS. IN-STORE

BEST OF BOTH WORLDS

**14%** OF WINE SHOPPERS BUY WINE USING PURCHASE AND PICK-UP

**9%** OF ALCOHOL BEVERAGE SHOPPERS USE CLICK AND COLLECT FOR AT LEAST SOME OF THEIR ALCOHOL BEVERAGE PURCHASES



## E-COMMERCE

- BEST FOR BUYING WINES THAT ARE HARD TO FIND
- BEST FOR SELECTION OF IMPORTED WINES
- BEST SELECTION
- SAVES TIME



## IN-STORE

- FOR BUYING MY REGULAR BRANDS
- BETTER FOR BUYING A GIFT
- THE BEST WAY TO EXPLORE AND FIND A NEW WINE OR SPIRIT
- NEED FOR IMMEDIATE USE



# GOOD THINGS COME IN ALTERNATIVE PACKAGES

41%

OF WINE CONSUMERS SAY THEY WOULD BUY WINE IN ALTERNATIVE PACKAGING IF THEY KNEW THE WINE WAS HIGH QUALITY



WINE IN CANS, TETRA PACKS AND SINGLE SERVE FORMATS ARE EXPANDING WINE TO MORE OCCASIONS, SUCH AS OUTDOOR GATHERINGS

25%

SINGLE SERVES ENTICE TRIAL. 25% OF WINE CONSUMERS SAY THEY ARE MORE OPEN TO TRY NEW WINES IF THEY DIDN'T HAVE TO BUY A FULL-SIZE BOTTLE