



WINE INTELLIGENCE

RUSSIA WINE CONSUMER INSIGHTS

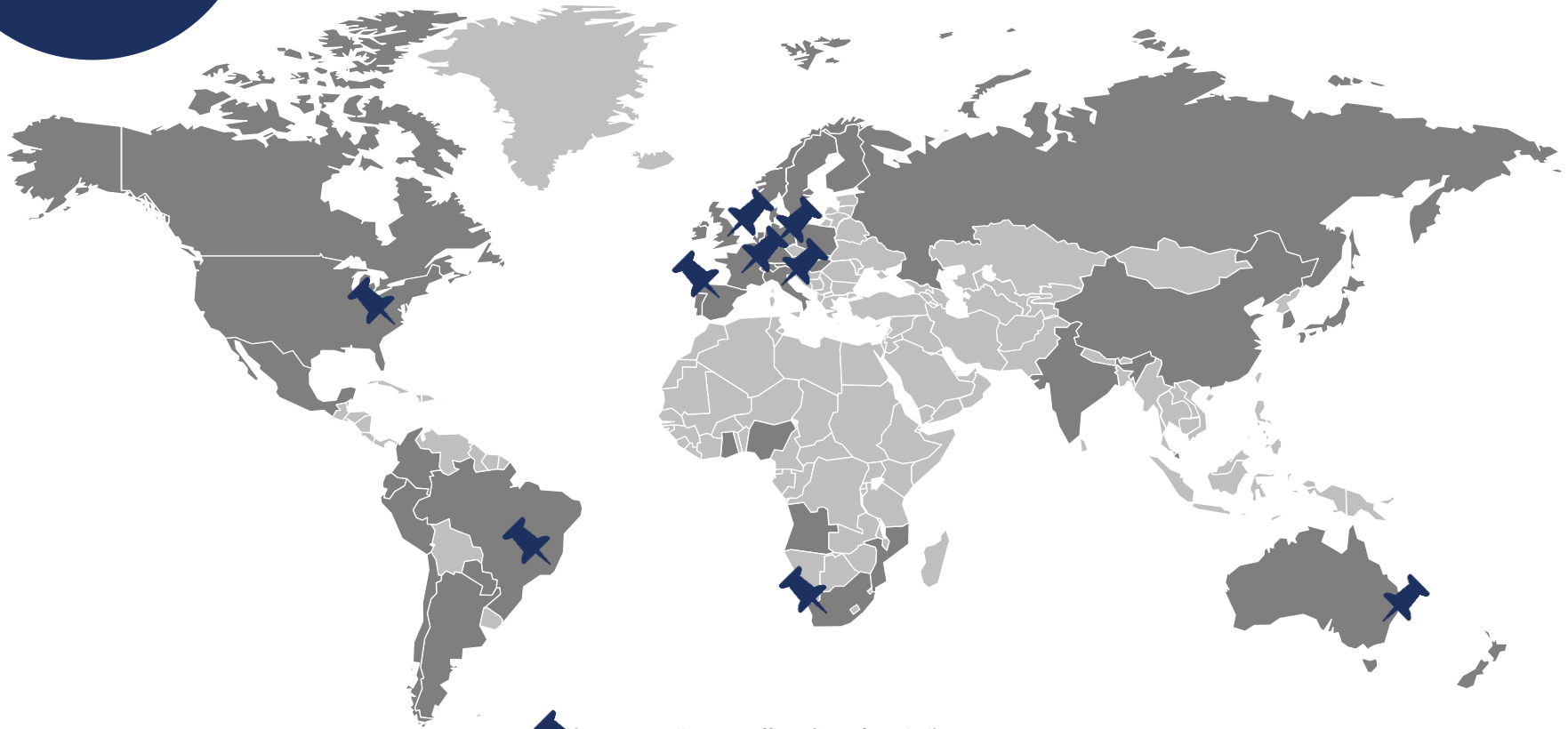
June 2021



CONSUMER RESEARCH IN 35 MARKETS GLOBALLY



Global
Scope



 Wine Intelligence offices (year founded)

- UK - Head office (2002)
- US (2006)
- South Africa (2007)
- Australia (2009)
- France (2011)
- Germany (2012)
- Italy (2013)
- Brazil (2017)
- Spain (2017)

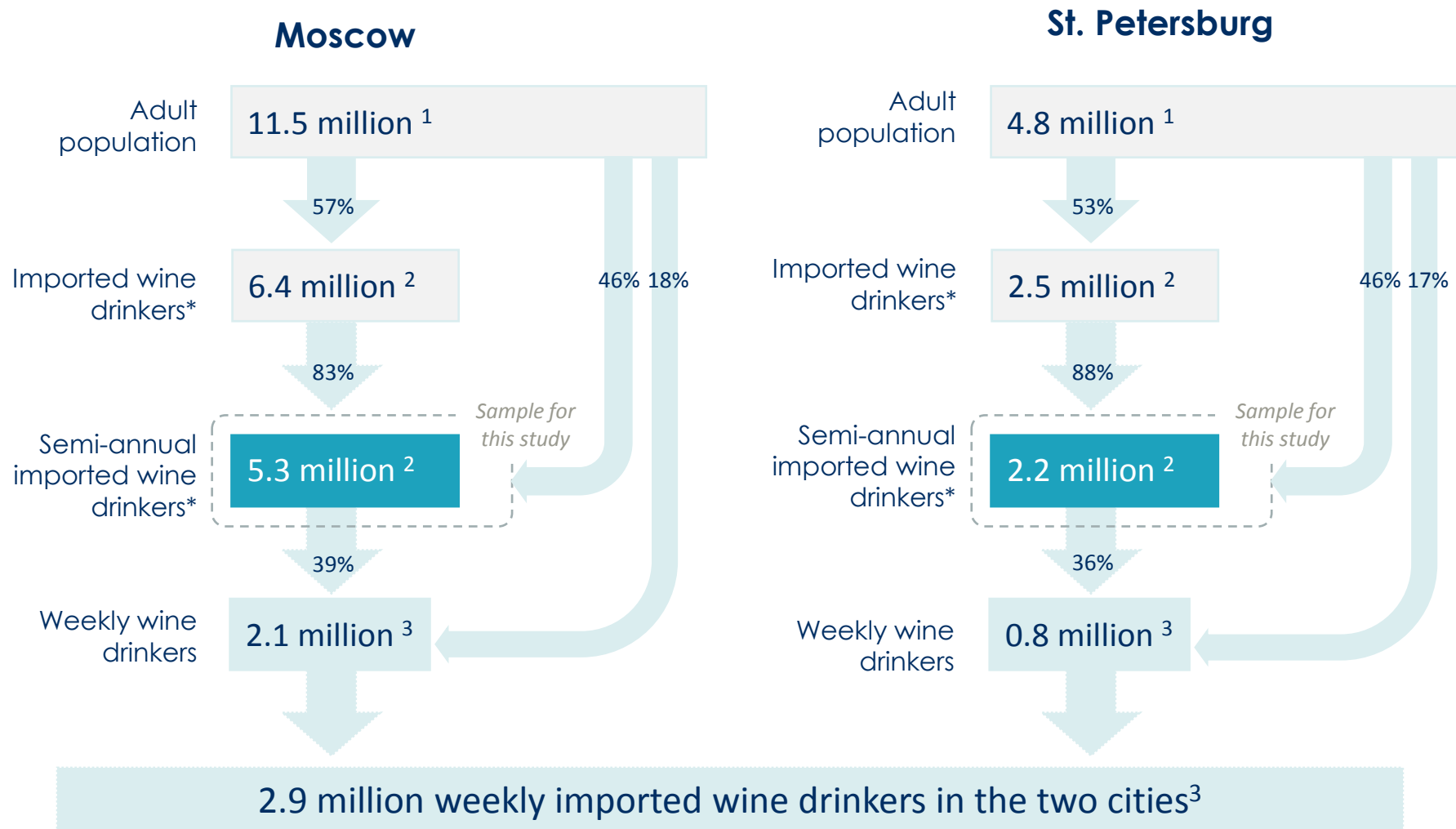
 Markets we work in

Russia Wine Consumer Insights from up to date Wine Intelligence Report Publication



The Russia Wine Land-scapes report is available in the Wine Intelligence reports shop (<https://www.wineintelligence.com/view-reports/>) for € 3,000 (report only) or € 3,600 (report + data table).

WINE DRINKERS IN RUSSIA




*Imported wine drinkers = upper-middle class (monthly income RUB 40,001+) imported wine drinkers aged 18-64 (who drink at least twice a year). See methodology for full details on the sample.


Sources: 1 www.state.gov

2 Wine Intelligence face-to-face calibration study with Ipsos, Feb'16, n=600 adults in Moscow and St. Petersburg. Imported wine=still light wine (red, white, rosé) from wine-producing countries other than Russia

3 Wine Intelligence, Vinitrac® Russia, Oct'20, (n=1,000) Russian imported wine drinkers

A large green circle containing text, positioned on the left side of the slide. The background features a network of grey lines and dots, resembling a globe or data visualization.

**What is the
attractiveness
of Russia as
export market?**

A large dark teal circle containing text, positioned in the center of the slide.

**What is the
profile of
regular Russian
wine drinkers?**

A large light blue circle containing text, positioned on the right side of the slide.

**What are
consumption
insights of
regular Russian
wine drinkers?**

A large, solid green circle is centered within a white rectangular frame. Inside the circle, the text "Russia is Top 10 ranked wine market" is written in a dark blue, bold, sans-serif font, arranged in four lines.

**Russia is
Top 10
ranked wine
market**

MARKET CLASSIFICATION



MATURE	ESTABLISHED	GROWTH	EMERGING	NEW EMERGING
Markets where wine appears to have reached its potential with stable or declining volumes	Markets with strong historical growth which is tailing off	Markets where wine is a mainstream product and / or experiencing growth	Markets where wine is experiencing growth and shows potential from a relatively low base	Markets where wine is still a relatively new and unknown beverage, but showing potential
<ul style="list-style-type: none"> Germany (3) Denmark (6) Switzerland (6) United Kingdom (8) France (9) Netherlands (13) Spain (14) Belgium & Luxembourg (17) Sweden (19) Australia (20) Austria (23) Norway (31) Slovakia (35) Chile (42) Argentina (47) 	<ul style="list-style-type: none"> United States (1) Canada (10) Ireland (15) Japan (18) Hungary (21) Czech Republic (22) Italy (24) Portugal (25) New Zealand (30) Finland (32) Hong Kong (33) Greece (37) Slovenia (44) South Africa (49) 	<ul style="list-style-type: none"> South Korea (2) Poland (5) Russia (10) Singapore (12) Romania (16) Brazil (26) Mexico (28) 	<ul style="list-style-type: none"> China (4) Taiwan (36) Turkey (38) Colombia (39) United Arab Emirates (45) Peru (46) Angola (50) 	<ul style="list-style-type: none"> Indonesia (27) Philippines (29) Thailand (34) Malaysia (40) India (41) Vietnam (43) Nigeria (48)

() Rank by attractiveness

() Top 15 most attractive wine markets in the world

Source: Wine Intelligence global wine market attractiveness model

**MILLENNIAL
WINE
DRINKING
Opportunity**

INVOLVEMENT TRACKING OF REGULAR RUSSIAN WINE DRINKERS



HIGHLY INVOLVED CONSUMERS INCREASING IN MOSCOW & ST PETERSBURG

Russian imported wine drinkers are placing higher importance on wine in their lives

Russian imported wine drinkers who have high or medium wine involvement has significantly risen over the past 6 years

There have been significant increases in the proportion of consumers who:

- Like to take their time when purchasing a bottle of wine
- Have strong interest in wine
- Find wine to be important to their lifestyles

Wine involvement: Tracking

Base = All Russian imported wine drinkers (n≥700)

	2014	2018	2019	2020	Tracking		
	n= 713	700	1,017	1,000	vs. '14	vs. '18	vs. '19
High involvement	19%	20%	26%	26%	↑	↑	→
Medium involvement	36%	44%	36%	43%	↑	→	↓
Low involvement	46%	36%	38%	31%	↓	↓	↓

WHAT DO MARKET EXPERTS SAY?

“Especially mid-aged consumers are very involved in the category – they are the most active and well-off part and their interest in wine is increasing. They want to learn more about it and try new products”

Wine Importer, Russia

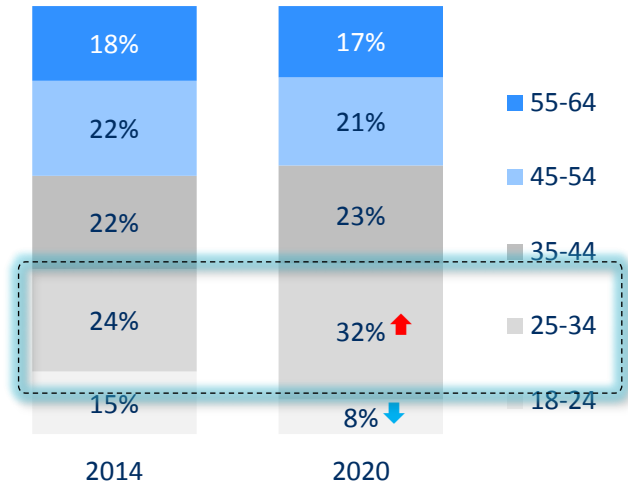
AGE PROFILE OF RUSSIAN REGULAR WINE DRINKERS



GROWTH IN MILLENNIAL WINE DRINKING POPULATION DRIVING ADVENTURISM

Evolving attitudes towards wine are supported by an increasing population of Millennial wine drinkers, keen on trying new wines on a regular basis

Age demographics of Russian Imported Wine Drinkers



Base = All Russian* imported wine drinkers (n≥700)

WINE CONFIDENCE OPPORTUNITY WITH MILLENNIALS



Millennials have a strong above average confidence index

Wine confidence and knowledge index **by age groups**

Wine confidence index (0-100) calculated based on the extent to which consumers feel competent about their wine knowledge

Wine knowledge index (0-100) calculated based on consumer-reported awareness of wine-producing countries, wine-growing regions and wine brands

Base = Russian imported wine drinkers in selected areas (n= 1.000)

		18-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55-64 [Boomers]
	<i>n= 1.000</i>	<i>n= 81</i>	<i>n= 429</i>	<i>n= 324</i>	<i>n= 167</i>
Wine confidence index	42,5	41,0	45,0	42,0	38,2
Wine knowledge index	32,5	24,2	30,7	35,3	35,9

MILLENNIAL COUNTRY OF ORIGIN AWARENESS



Millennials with average awareness of TOP five countries

Country of origin awareness by age groups

% who know the following places produce wine

Base = Russian imported wine drinkers in selected areas (n= 1.000)

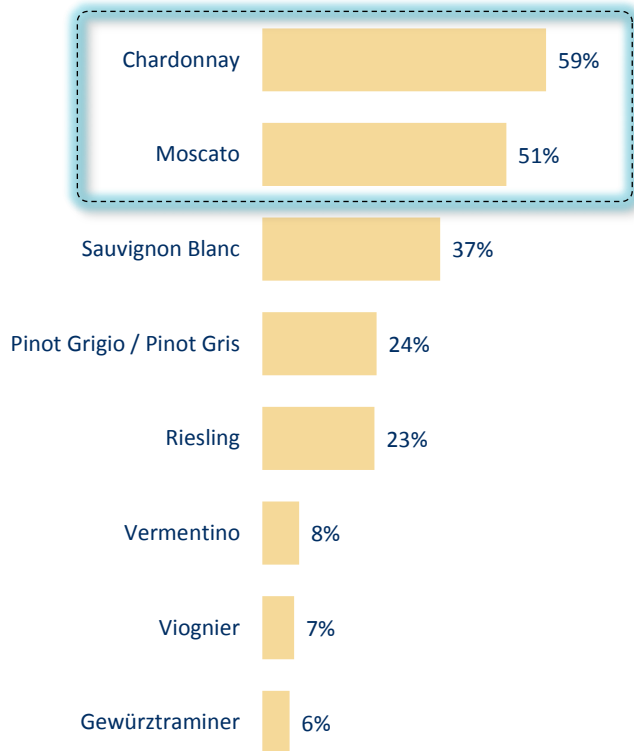
Rank			18-24 [Gen Z]	25-39 [Millennials]	40-54 [Gen X]	55-64 [Boomers]
		n= 1.000	n= 81	n= 429	n= 324	n= 167
1	France	85%	72%	81%	89%	89%
2	Spain	84%	70%	79%	89%	91%
3	Italy	83%	63%	82%	86%	91%
4	Georgia	83%	72%	79%	88%	89%
5	Russia	81%	57%	78%	86%	89%
6	Moldova	72%	27%	68%	83%	85%
7	Chile	66%	39%	58%	77%	81%
8	Portugal	63%	40%	57%	71%	74%
9	Argentina	54%	29%	50%	59%	66%
10	Bulgaria	51%	19%	40%	61%	75%
11	Germany	43%	31%	34%	49%	60%
12	Hungary	39%	12%	26%	51%	63%
13	South Africa	36%	15%	32%	42%	47%
14	Australia	34%	18%	30%	40%	40%
15	California	28%	11%	22%	33%	42%
16	New Zealand	26%	10%	23%	33%	31%
17	Other USA (e.g. another state in USA)	20%	21%	16%	25%	20%
18	Uzbekistan	13%	6%	10%	16%	18%
19	Other	3%	1%	3%	4%	5%
20	Don't know	2%	1%	2%	2%	0%

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**Top ranked
varietals**

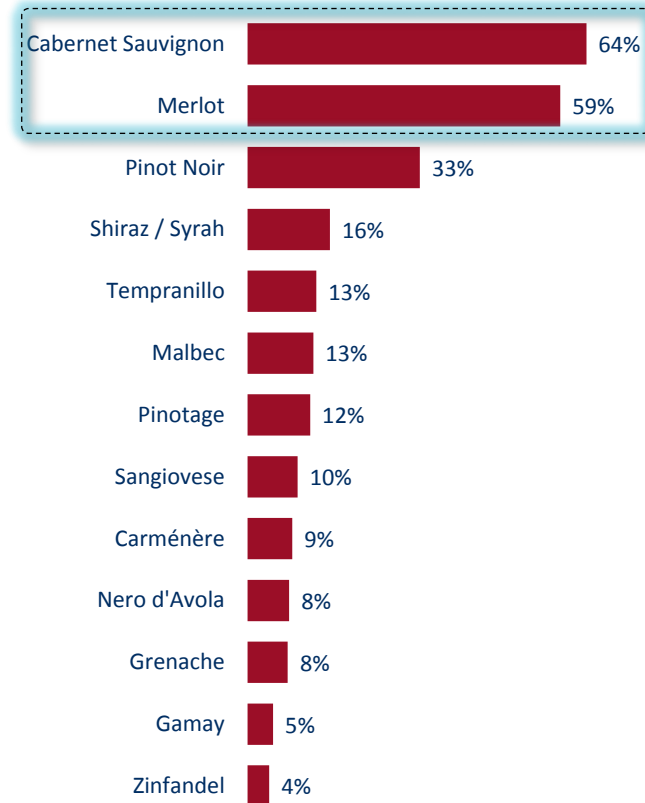
White varietal consumption

% who have drunk the following varietals or wine types in the past 6 months
Base = All Russian imported wine drinkers (n=1,000)



Red varietal consumption

% who have drunk the following varietals or wine types in the past 6 months
Base = All Russian imported wine drinkers (n=1,000)



A large, light blue circle containing the text "Price hike increases focus on value for money" in a dark blue, sans-serif font, centered within a white rectangular frame.

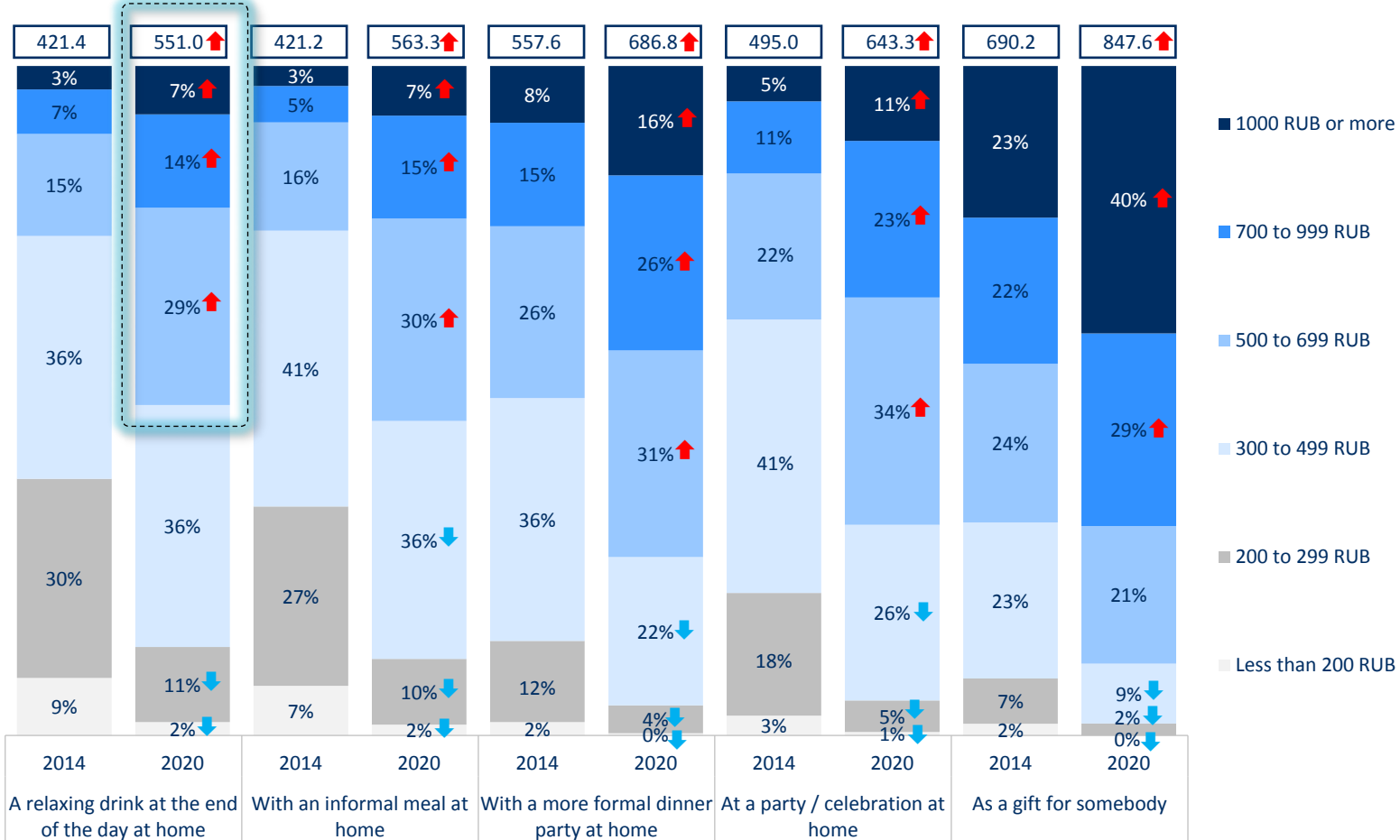
**Price hike
increases
focus on
value for
money**

OFF-TRADE: SPEND ON WINE BY OCCASION



Off-trade: Spend on wine by occasion

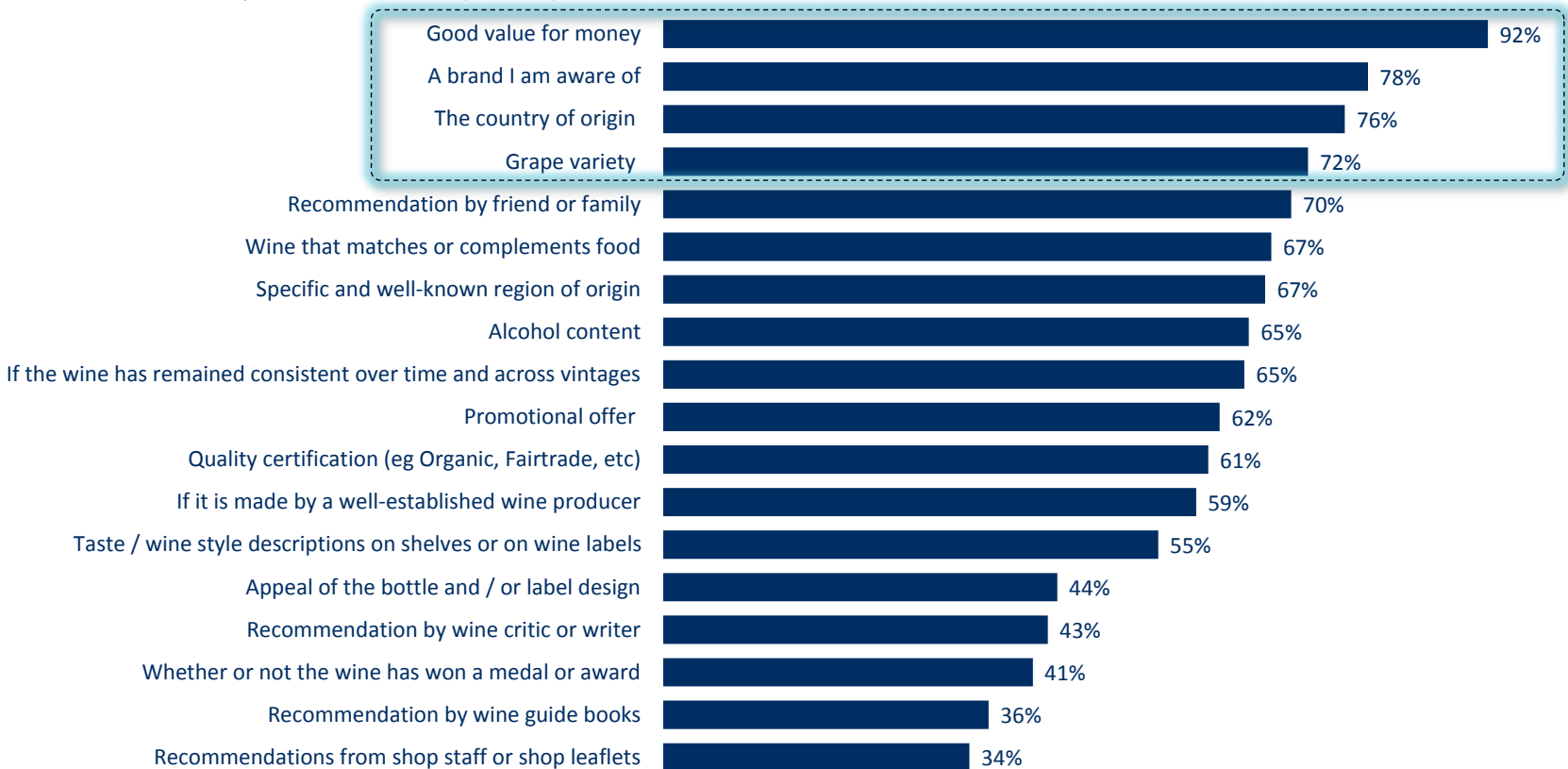
% who typically spend the following amount on a bottle of wine on each occasion
 Base = Those who drink wine on each occasion



▲ / ▼ Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
 Source: Wine Intelligence, Vinitrac® Russia, Mar'14, Oct'20, (n≥713) Russian imported wine drinkers

Wine-buying choice cues

% who indicate each of the following factors is 'important' or 'very important' when buying wine
 Base = All Russian imported wine drinkers (n=1,000)





wine
intelligence

*Connecting wine businesses with
knowledge and insights globally*

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