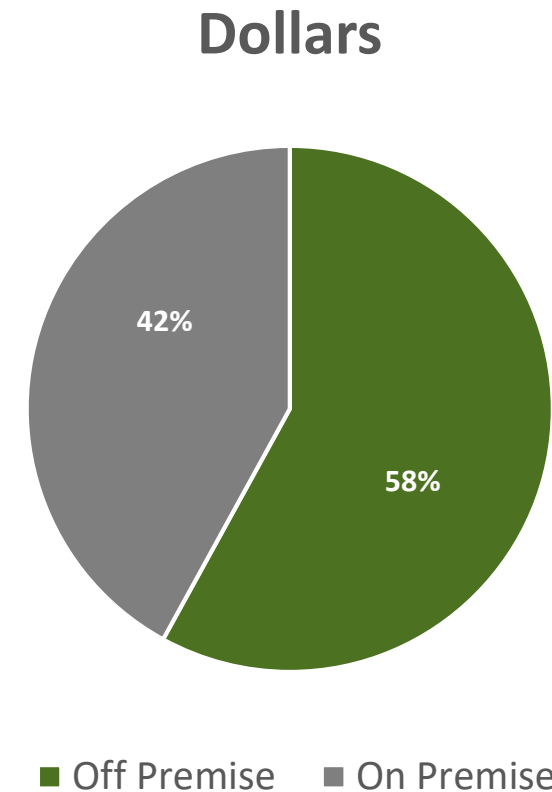
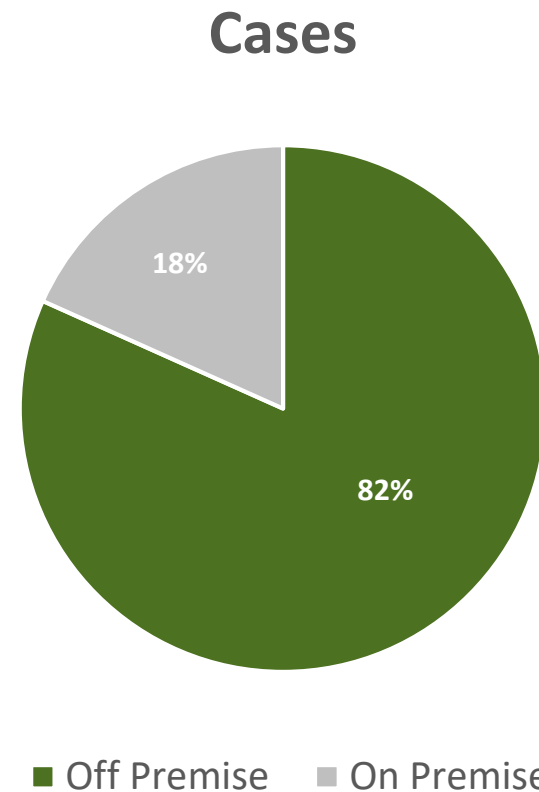


WINE INDUSTRY

**TECHNOLOGY**

SYMPOSIUM

# ON PREMISE WINE BUSINESS NOW VALUED AT \$17.9B IN ANNUAL SALES

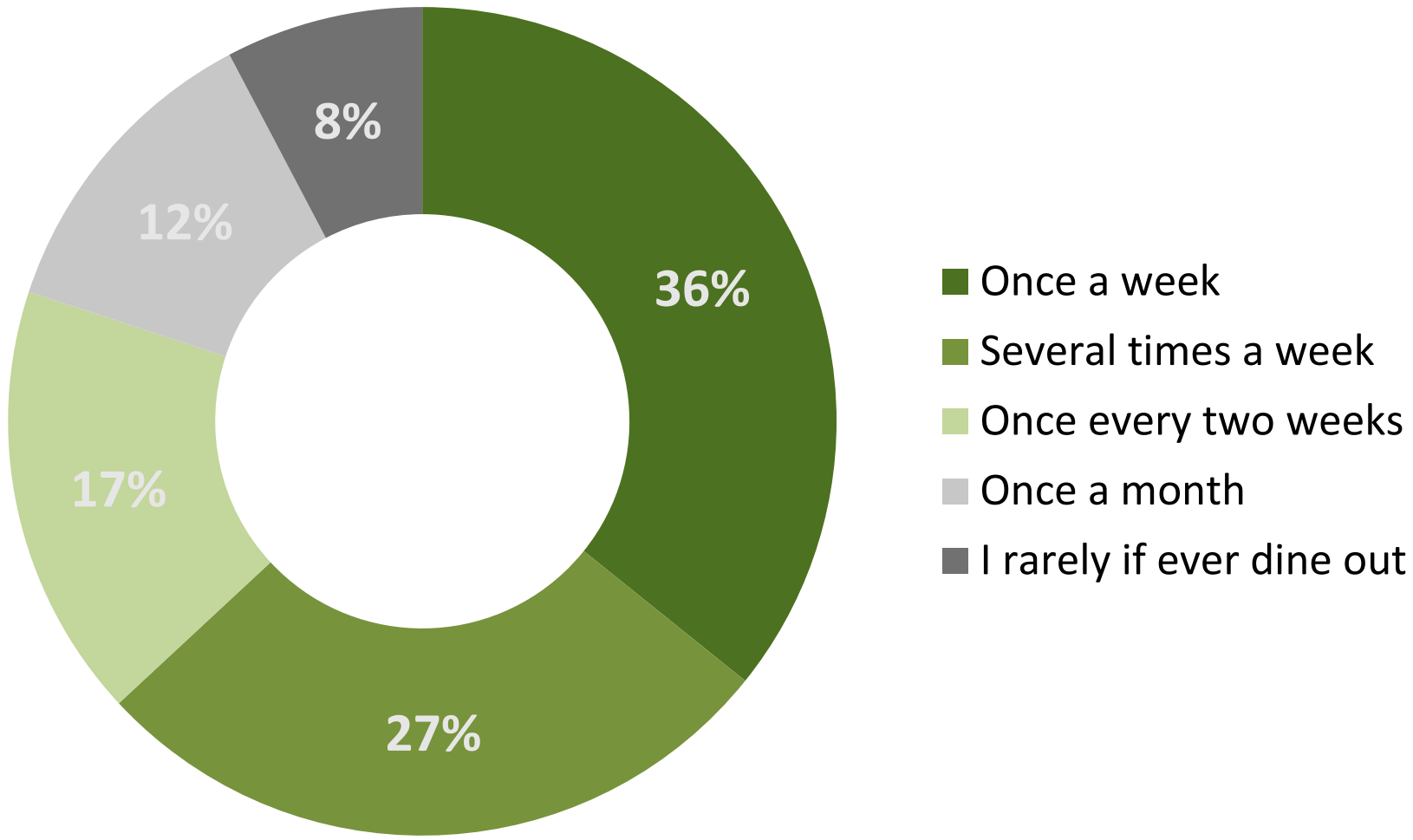


- **133% increase in share from volume to value in the on premise**
- **1.6 On-Premise Outlets for every Off-Premise Outlet currently operating.**

# 63% OF REGULAR WINE DRINKERS DINE OUT ON A WEEKLY BASIS

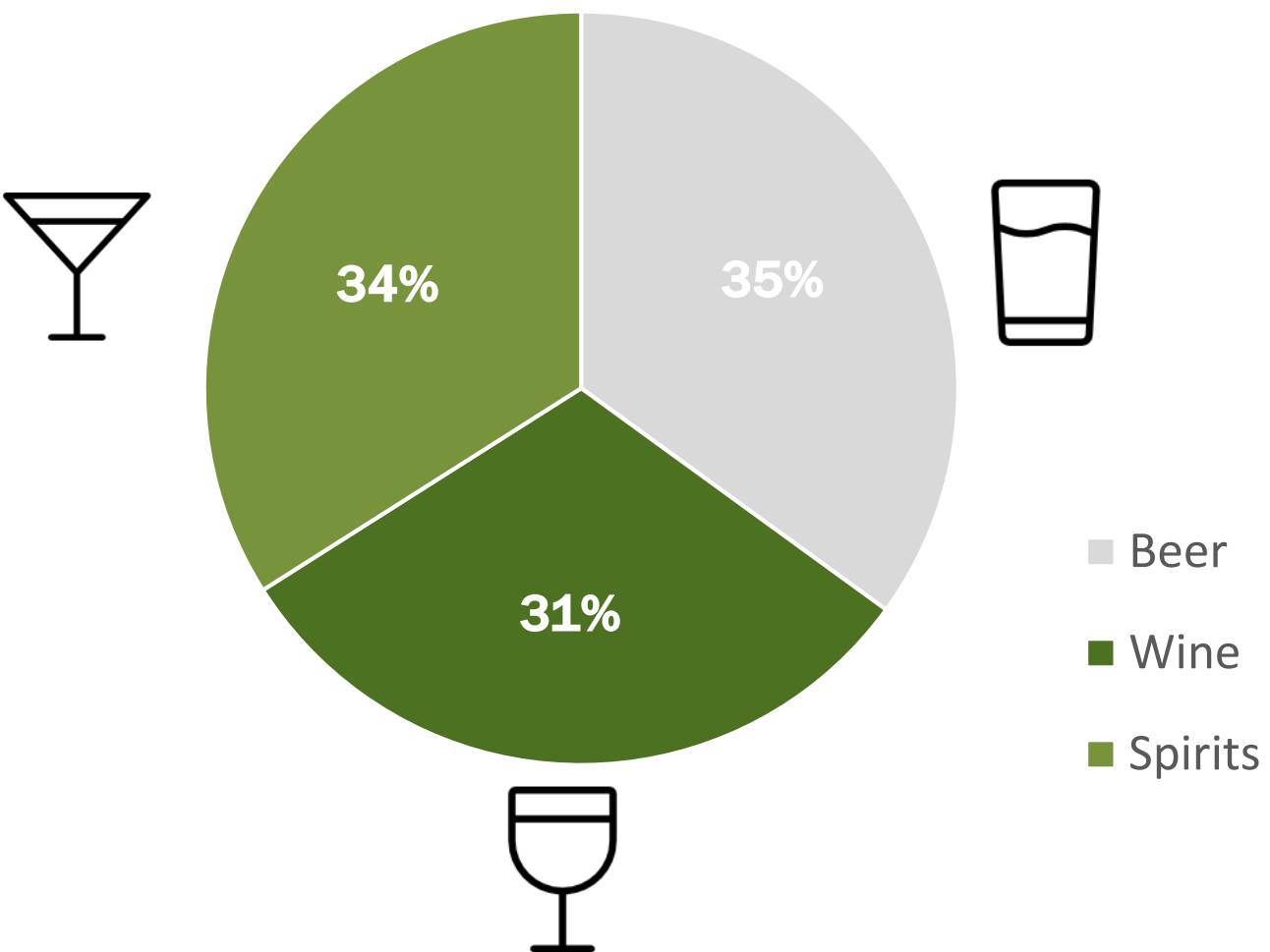


- Opportunity to reach consumers in a less saturated environment.
- 30% of Millennials report dining out multiple times a week – *largest share of wine value consumption.*

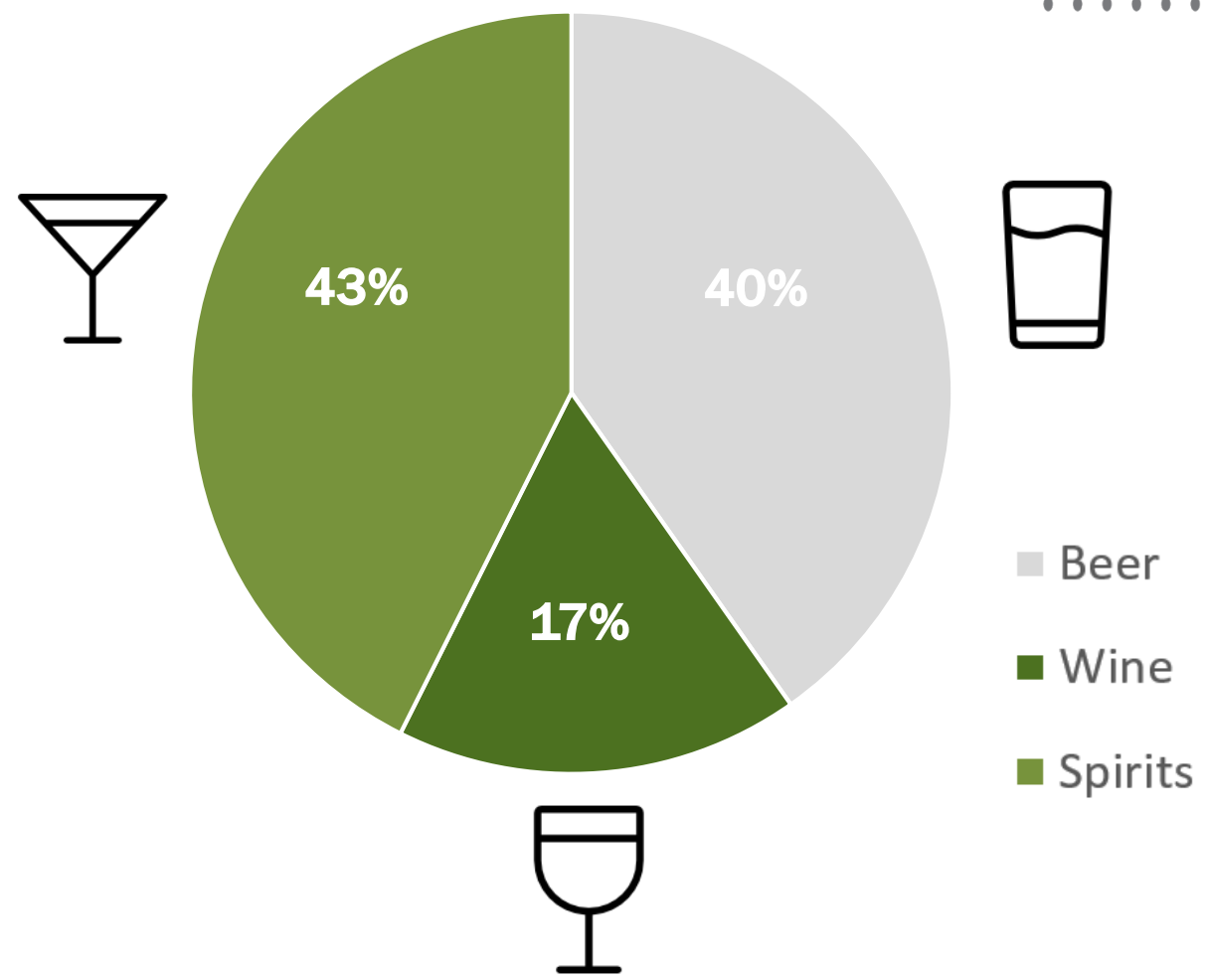


# ON PREMISE WINE INDUSTRY HAS AN APATHY PROBLEM

Share of Primary Order Frequency

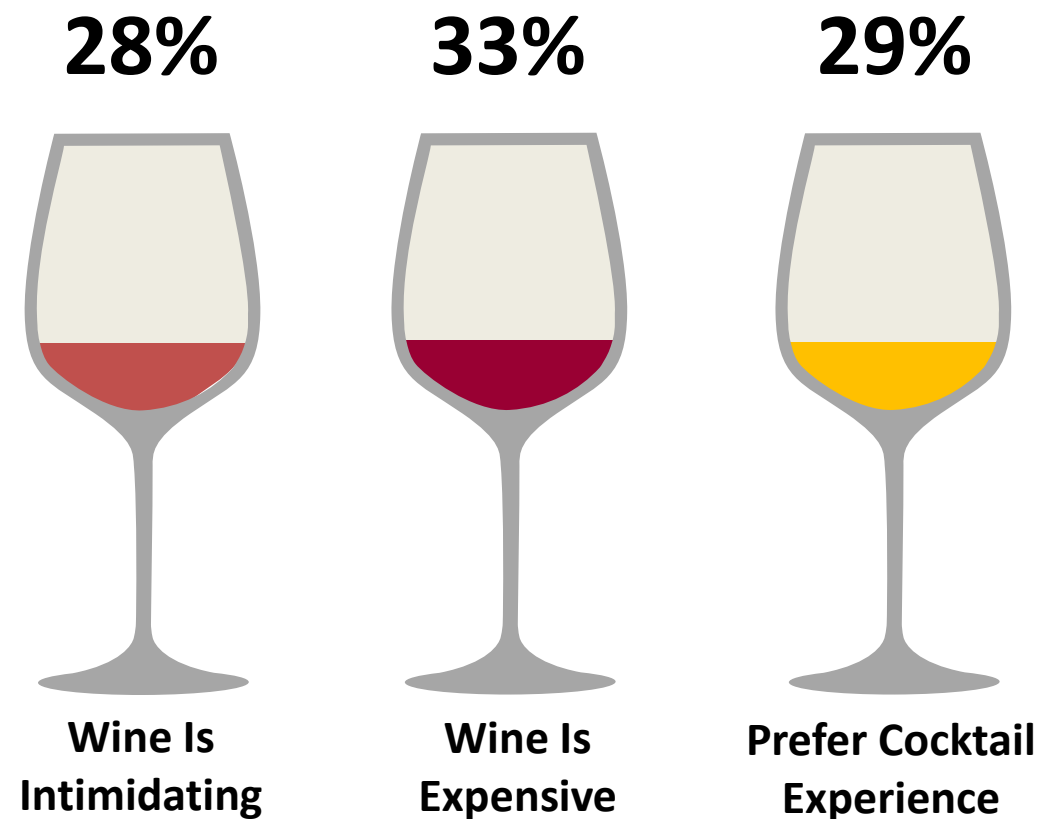


Share of On Premise \$ Sales



# PRICE AND EXPERIENCE PARITY ARE LEADING REASONS FOR CHOOSING WINE LAST WHEN DINING OUT

## TOP REASONS FOR CHOOSING WINE LAST



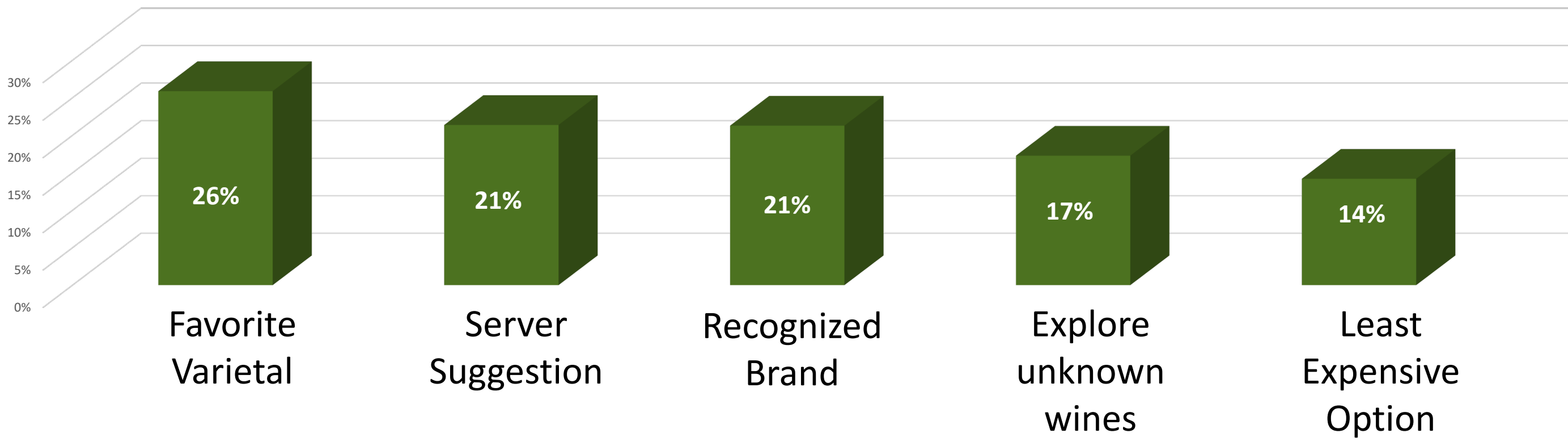
## WAYS TO SOLVE FOR THIS

- 1) Strong approaching brand stories
- 2) Alternative Packaging
- 3) Wine Crafted Cocktails

# OPPORTUNITY TO AFFECT ON PREMISE CONSUMER DECISION MAKING



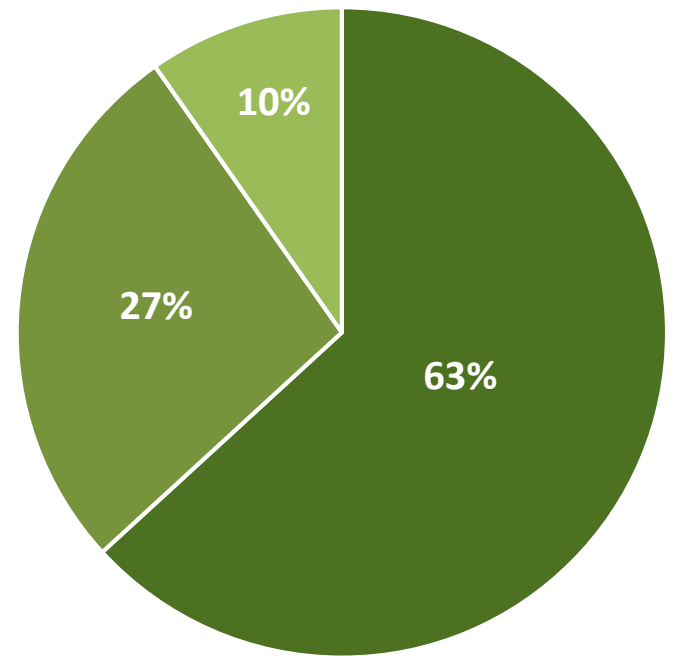
When ordering wine at a restaurant or bar, which of the following would best describe your decision process?



# CONSUMERS DON'T WANT TO LOOK CHEAP IN THE ON PREMISE



- **63% of regular wine drinkers choose the middle-priced option when selecting from a list of unfamiliar wines.**
- **Millennial consumers are most likely to find wine prices approachable at on premise establishments.**



- The middle priced option – should be a safe choice
- The least expensive – if I don't like it, at least I didn't waste my money
- The most expensive option – if it's expensive, it must be the best tasting

# WINE ON TAP AWARENESS RELATIVELY HIGH AT 62% AMONG REGULAR WINE DRINKERS



53%

Of consumers who have heard about wine on tap have tried it

60%

Of consumers want to see their favorite brands on tap

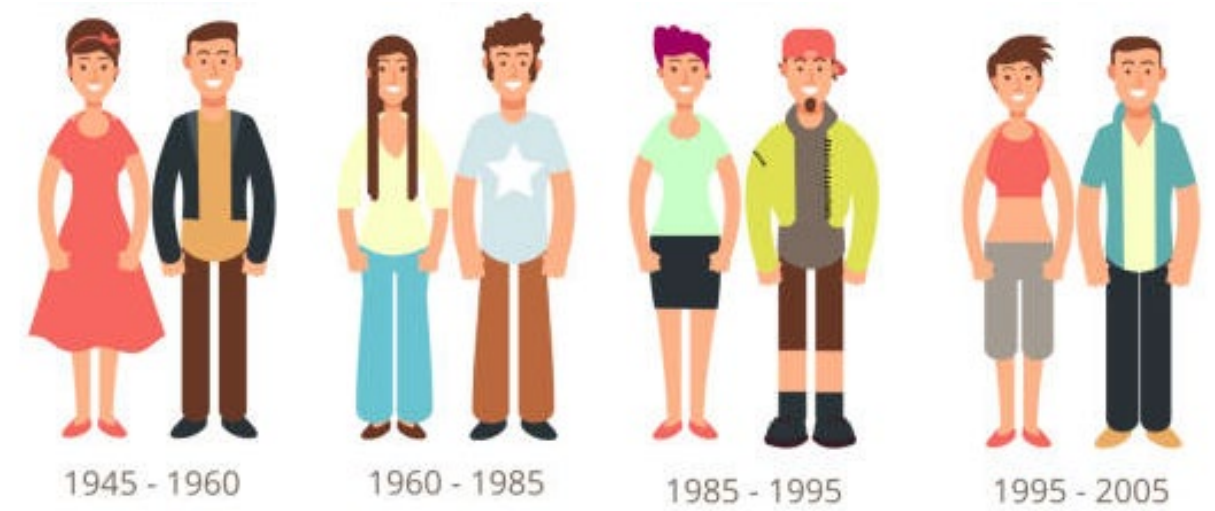
45%

Of consumers have strong positive feelings about wine on tap



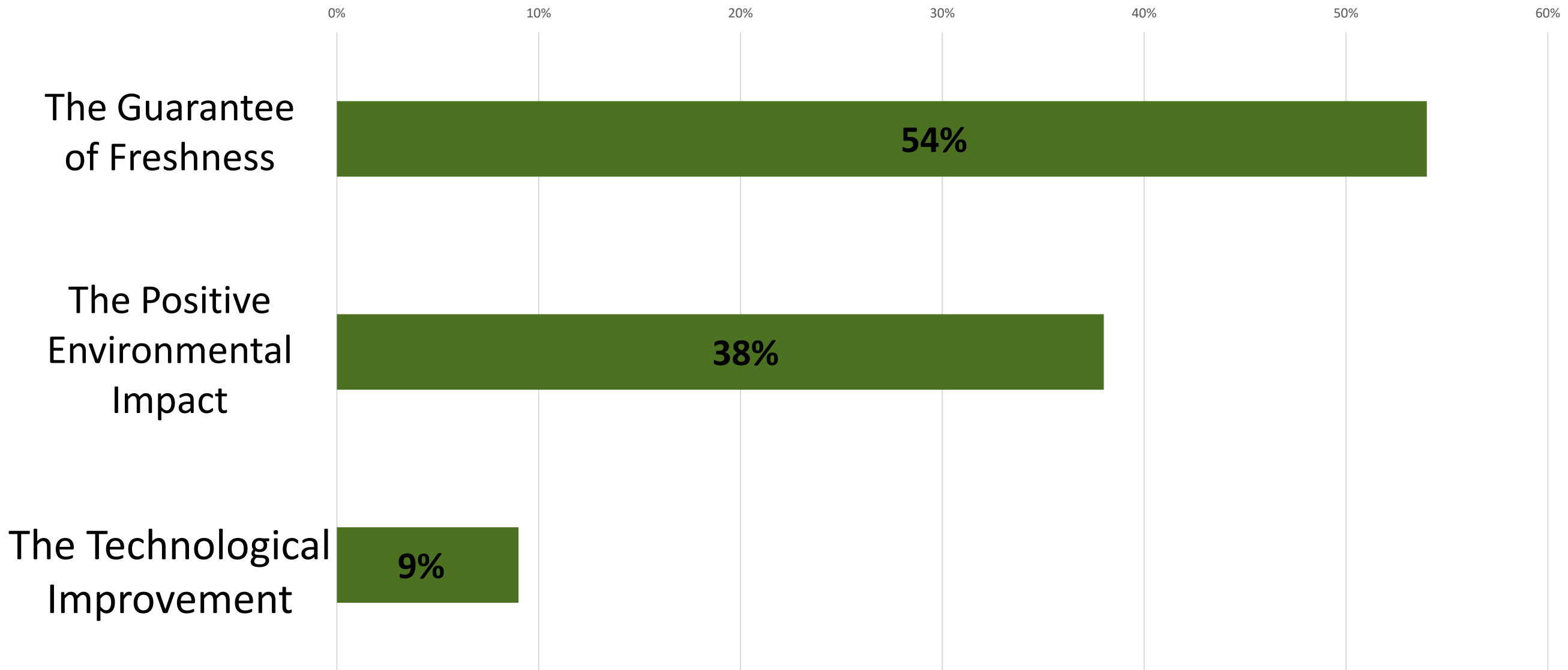
# DIFFERING OPINION ON WINE ON TAP USEFUL IN IDENTIFYING OPPORTUNITY

- Younger Generations more open to wine on tap than older generations – largest LDA group.
- Boomer’s show highest conversion of opinion when informed of wine on tap benefits.



Reaction to Wine on Tap Benefits	Boomers	Gen X	Millennials	Gen Z
Wow, that’s really cool. I was a fan before and even more so now.	31%	33%	48%	47%
I had reservations before but would try wine on tap now knowing the benefits.	47%	46%	39%	44%
Still not a fan, and probably wouldn’t try it if available	23%	21%	12%	10%

# GUARANTEED FRESHNESS LEADS ENVIRONMENTAL BENEFITS IN WINE ON TAP MOTIVATOR PREFERENCES



# A FEW ADDITIONAL INSIGHTS

- **“Lowest Price” and “Best Price” are not equivalent on a wine menu**
- **40% of consumers would be more likely to try out a new restaurant if they knew wine on tap was available**
- **Consumers willing to pay as much as a 9% premium for a great customer experience.**

# Thank you!

[Alex.Kessler@oneillwine.com](mailto:Alex.Kessler@oneillwine.com)