

What is the consumer buzz on Green Wines?

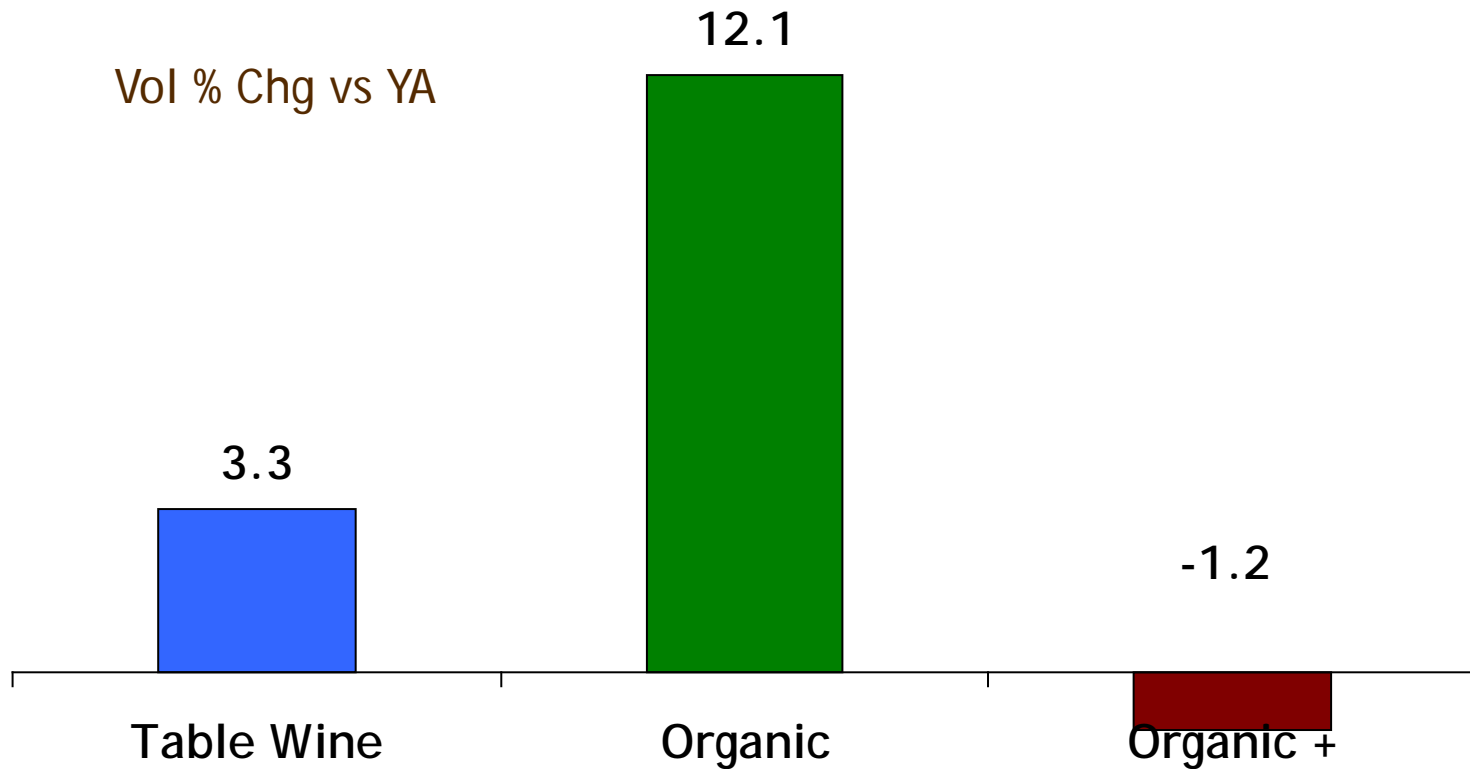
December 2, 2009

THE NIELSEN COMPANY

- Tracking sales, usage and sentiment across CPG and Beverage Alcohol categories
- Sales data for “Green” Wine segments
- Online “buzz” analysis to uncover what consumers are saying

What's the sales landscape today?

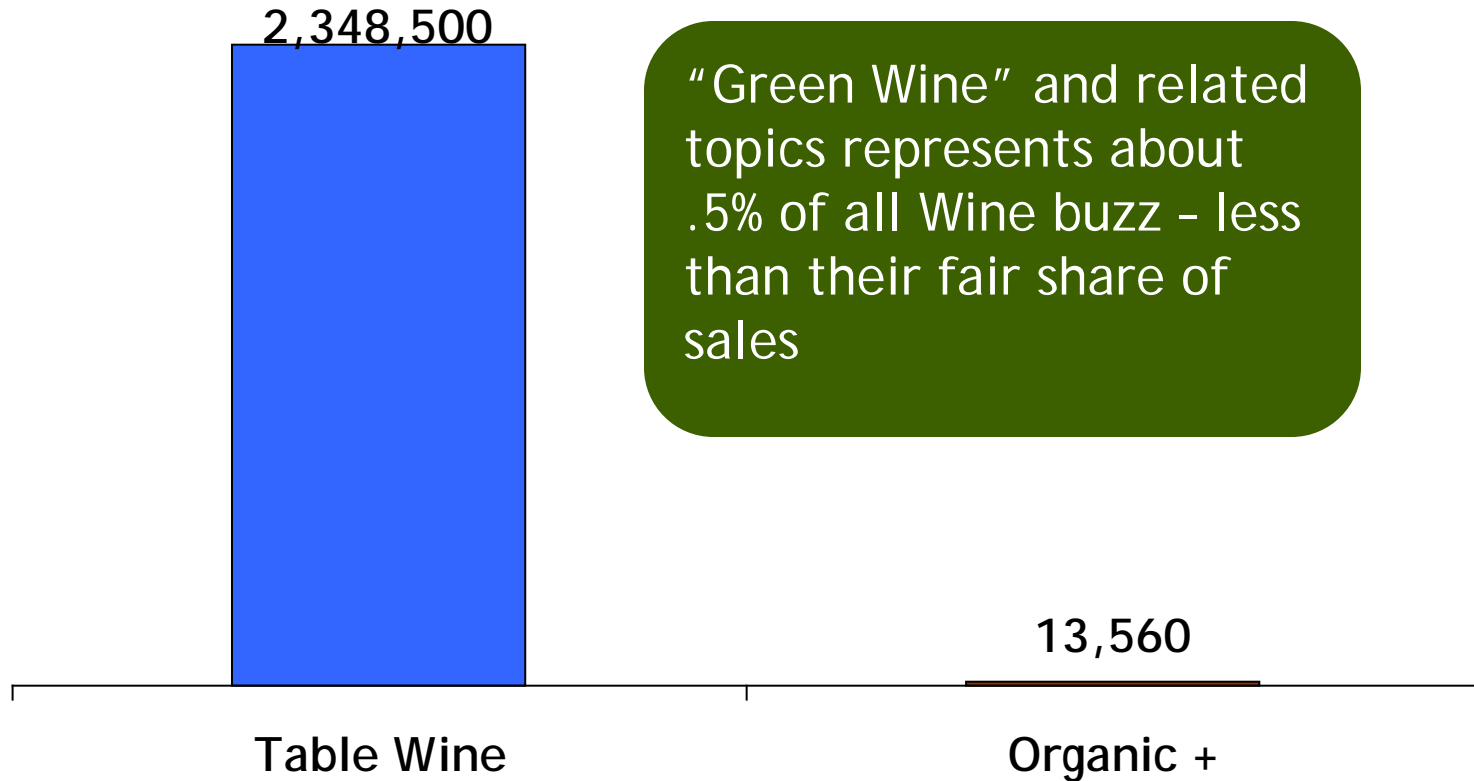
Share of Table Wine = 0.5 1.9



Source: Total U.S. FDL Sales, Timeframe: 52 weeks ending October 17, 2009

Buzz to Sales Comparison

Buzz Volume

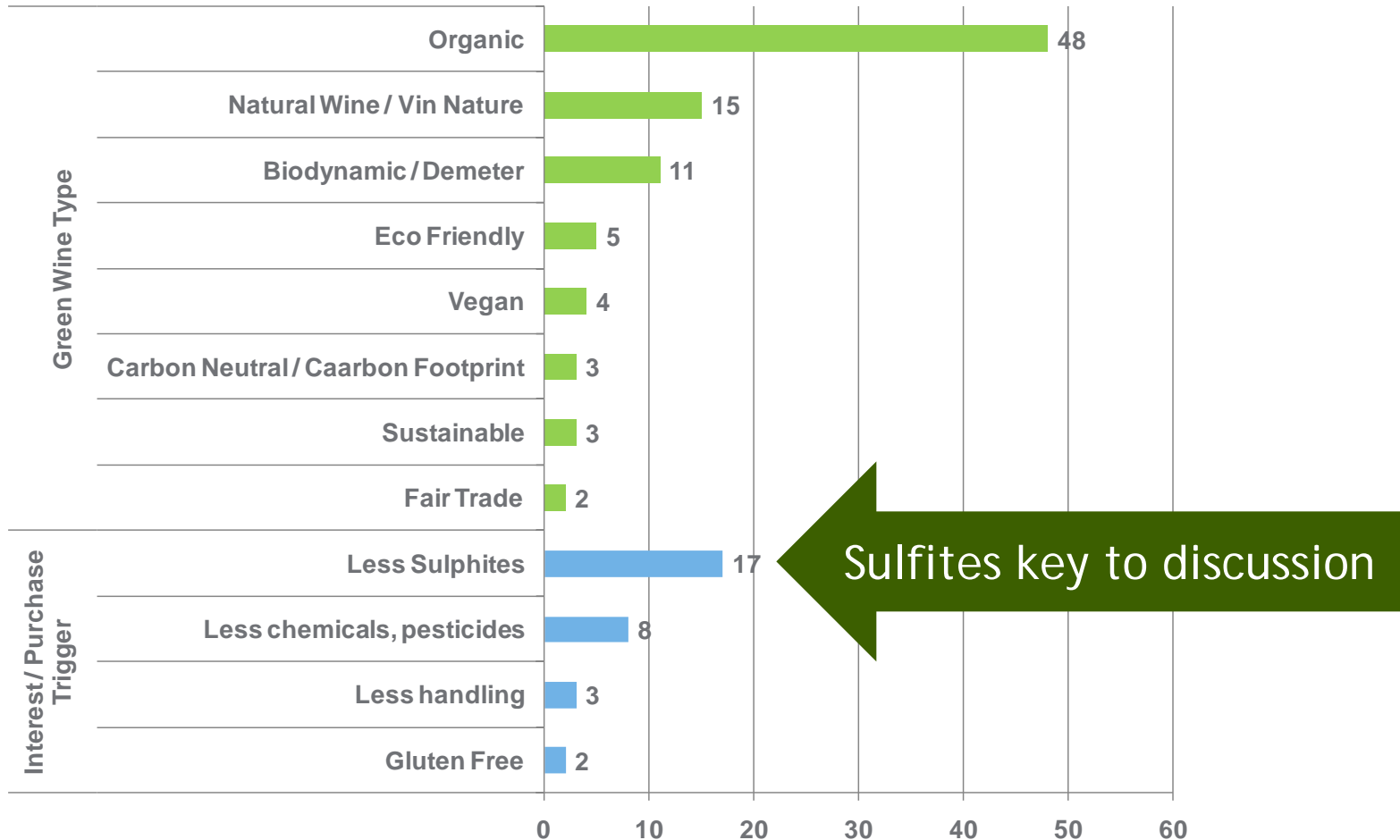


“Green Wine” and related topics represents about .5% of all Wine buzz - less than their fair share of sales

Source: Total U.S. Nielsen Online Buzz, Timeframe: October 2008 - October 2009

Various Discussion Threads

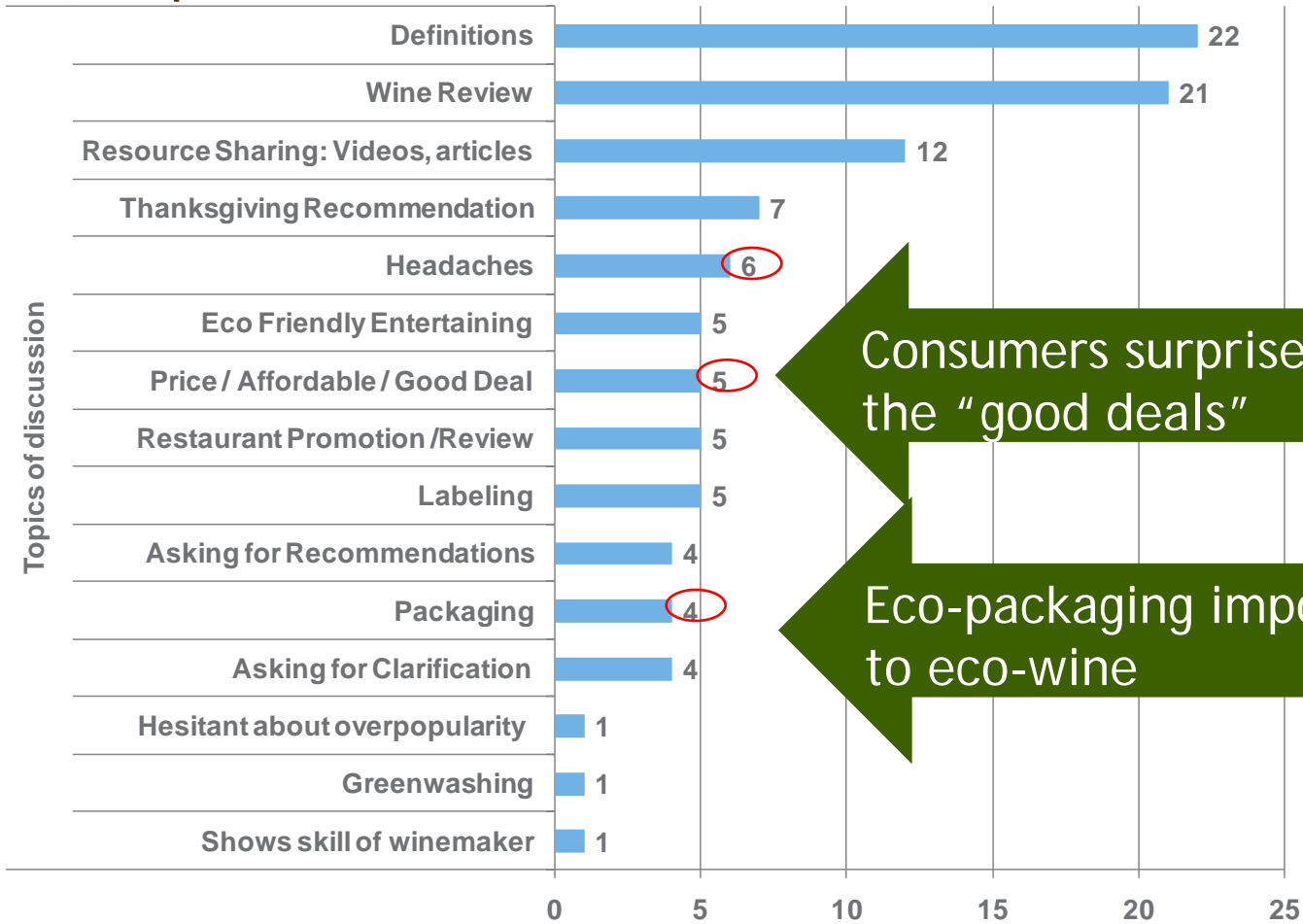
Topics of Discussion (%)



Source: Total U.S. Nielsen Online Buzz , Timeframe: September 1 - November 16, 2009

Lots of Definition-Seeking

Topics of Discussion



"Is it true that organic wine might spare me the headaches I get from even a glass of red wine? We like Shiraz"
Twitter.com. 11/6/2009

Consumers surprised by the "good deals"

Eco-packaging important to eco-wine

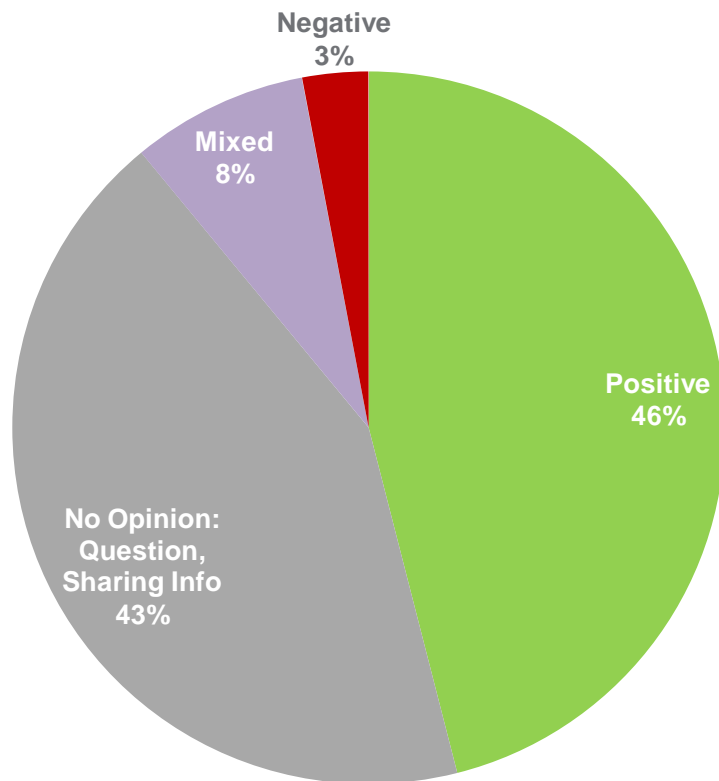
"Is boxed wine more eco-friendly than bottled? Earth Talk takes a look."
Twitter.com, 11/6/2009

Source: Total U.S. Nielsen Online Buzz , Timeframe: September 1 - November 16, 2009

Consumers positive, but have lots of questions

Sentiment

September 1 - November 16, 2009



Positive:

Consumers state they are excited about various Green Wine offerings. Many comments are stem from green / natural living enthusiasts.

No Opinion:

Consumers ask and define for each other definitions of organic, natural, biodynamic and vegan wines.

Mixed:

Some consumers have mixed opinions regarding the success of green wine.

Negative:

A few consumers complain that Green Wines are a marketing ploy.

Source: Total U.S. Nielsen Online Buzz , Timeframe: September 1 - November 16, 2009

Where does this leave us?

- **Key constant to remember – Markets Change**
- Plenty of upside for growth
- Opportunity for strong, consistent leadership to help consumers
 - Sort between definitions
 - Align “product features” with expectations