



COMPETITIVE OVERVIEW

PRIMARY COMPETITOR BRAND HEADLINES

- **Brand Background:** Brand X is the largest in the category at est. XMM Cases, yet its share L52W vs. PY is **-0.1** ppts for the flavor category and **-0.43** ppts for the overall category. Its volume is sluggish at **+3%**, despite category growth **+7.5%**.
- **Positioning:** Brand X's positioning is rooted in the insight that life is best lived when you unleash your authentic, confident self. The brand invites consumers to be their unapologetic, true self to make any moment amazing.
- **Brand Identity:** Its primary distinctive asset is consistent and creates a strong brand impact on the shelf. While it has high awareness, its label underperformed with its drinkers.
- **Campaign:** The brand's campaign debuted in 2019 along with a sports partnership and event sponsorship. Over the years, the brand has invested \$12MM-\$18MM annually to drive top-of-mind awareness with this campaign. The campaign celebrates the confidence the brand gives its consumers and focuses on more status/badge-driven higher energy social occasions in its TV & digital advertising, social media, retail, sports sponsorship, and experiential activations.

Thought-starter: How do we beat them where they're weak? (Compelling packaging design/brand identity, talking to the consumers they are ignoring, etc.?)

COMPETITIVE DEEP DIVE

Key Takeaway: Competitors 1-4 are putting pressure on our Primary Competitor. Competitor 1 is growing in line with the Sauv Blanc Category and nearing our Primary Competitor's size. Meanwhile, Competitor 3's volumes are +16% vs. YA, 4 times faster than the Primary. While Competitor 2's growth lags the Primary's, their introduction of a low calorie product, keeps competitive pressure on the Primary Competitor's low cal product. All these brands are also targeting/marketing to a younger consumer, despite the higher age demographics of the category. All external brands are also targeting a younger demographic.

	Primary Competitor	Competitor 1	Competitor 2	Competitor 3	Competitor 4
TTL Volume	1.8MM cases	1.5MM cases	1MM cases	997k cases	54k cases
Growth	+4% vs PY	+7% vs PY	+3% vs PY	+16% vs PY	-3% vs PY
Price	\$14.12	\$12.14	\$11.86	\$12.45	\$31.27
Consumer Base	Older Millennial/Gen X *over-indexes with women and Boomers, under-indexes with Gen Z & Younger Millennials	Older Millennial/Gen X *over-indexes with Older Boomers	Millennial/Gen X *over-indexes with Gen Z/Older Millennials	Millennial, Avg age is 47	Targeting a new generation of wine drinkers (presumably Gen Z & younger Millennials)
Brand Vision / Purpose	Inviting consumers to be their unapologetic, true selves to make any moment amazing	Open up a world of possibilities by living in the moment	Refresh the spirit with moments of chill	Products rooted in gratitude and family	Pursuing perfection, capturing and revealing the natural beauty of each region
Extrinsics	Confident, Contemporary, Positive, Inclusive, Innovation, Unconventional	Optimistic, Upbeat, Sustainability, Traditional, Sophisticated, Connection	Refreshment, Vibrant Invigorating Heritage Clever	Traditional, Family-oriented , Community-Oriented, Safe	Sustainability, Natural, Sophisticated, New Zealand Legacy, Adventurous