



PORTRAITS



AUSTRALIA | 2012

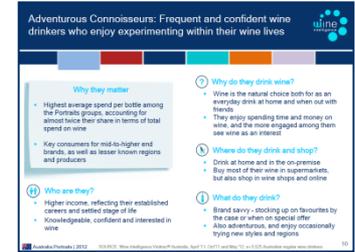
REPORT PRICE: GBP 2,500 or 5 Report Credits*

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1 MANAGEMENT SUMMARY

>> An introduction to Australia Portraits and what you need to know about each group

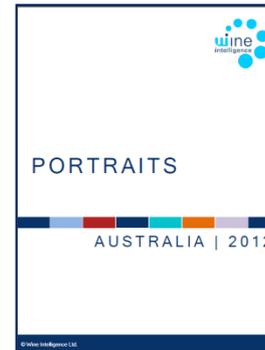


22 page PowerPoint (pdf) document

2 HANDBOOK

>> A more detailed description of each of the segments and their relationship with wine

- Portraits overview and identifying your target
- Each portrait
 - Adventurous Connoisseurs
 - Developing Drinkers
 - Mainstream Bargain Hunters
 - Contented Casuais
 - Newbies
 - Senior Sippers
- Methodology



59 page PowerPoint (pdf) document

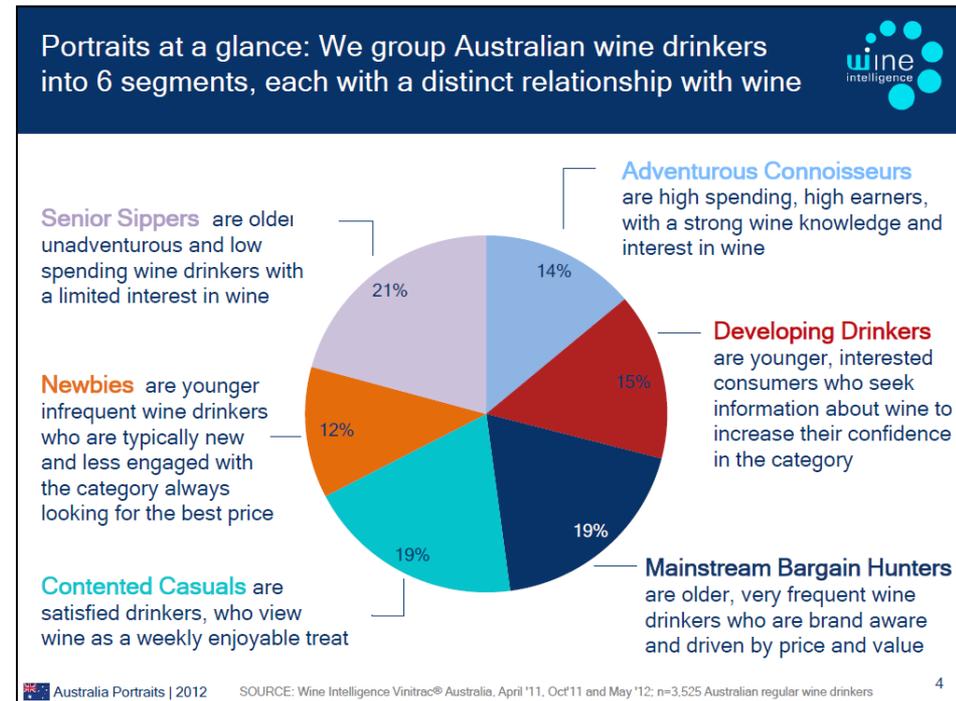
3 PROFILING TABLES

| Segment | Share of total wine spend in 2012 (%) | Share of total wine spend in 2011 (%) | Share of total wine spend in 2010 (%) | Share of total wine spend in 2009 (%) | Share of total wine spend in 2008 (%) | Share of total wine spend in 2007 (%) | Share of total wine spend in 2006 (%) |
|----------------------------|---------------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|---------------------------------------|
| Adventurous Connoisseurs | 14% | 13% | 12% | 11% | 10% | 9% | 8% |
| Developing Drinkers | 12% | 11% | 10% | 9% | 8% | 7% | 6% |
| Mainstream Bargain Hunters | 25% | 24% | 23% | 22% | 21% | 20% | 19% |
| Contented Casuais | 18% | 17% | 16% | 15% | 14% | 13% | 12% |
| Newbies | 10% | 9% | 8% | 7% | 6% | 5% | 4% |
| Senior Sippers | 8% | 7% | 6% | 5% | 4% | 3% | 2% |

What is Australia Portraits?



- Australia Portraits is a segmentation of Australian regular wine drinkers. We use a statistical method called cluster analysis to group consumers who have similar levels of base spend on wine, frequency of wine consumption and attitudes towards wine
- We then study these consumer groups through quantitative and qualitative research (including through focus groups, interviews, and through our online survey platform Vinitrac®) to build a deep understanding of how they behave and what motivations lie behind their wine consumption
- Australian Portraits therefore provides wine businesses with a reference segmentation which can be applied to individual brands, regions, countries of origin, style categories and retailers.



What is the scope of Portraits?

- Portraits is based on a detailed survey of over 3,000 regular wine consumers – that is, those who drink wine at least once per month (a full description of the sample is included in the appendix) and conducted using an online questionnaire.
- This sample is fully representative of Australia's 11.5 million regular consumers of still light wine based on the Wine Intelligence annual calibration survey of wine drinkers in Australia.
- In addition, a qualitative research programme was conducted (see appendix for details on qualitative research methodology) using face-to-face focus groups with consumers from the key segments. This qualitative work focused on gaining an additional in-depth understanding of the motivations and behaviours driving wine consumption.

Portrait-based wine business strategies



Our clients have used the Portraits report series in a variety of ways to target their high-potential consumers. Here are a few examples of how this consumer segmentation can be used to develop more tailored wine business strategies.

PORTFOLIO STRATEGY

The first step when selling a product to the Australian market is deciding who the target consumers are. Wine companies have used Australian Portraits to assess where their market opportunity lies by determining to whom their products might appeal, and to design an overall portfolio strategy that is targeted to these consumers.

BRAND HEALTH ASSESSMENT AMONG TARGET PORTRAIT GROUPS

Vinitrac® - our global online wine drinker survey – allows Wine Intelligence to assess brand health among both regular wine drinkers overall and within specific Portraits segments, including looking at trends over time. This can be used to understand with which consumers a brand is strongest and weakest, and to assess competitive positioning among target consumers.

When looking to explore how consumers react to a product's branding in more depth and what conscious and unconscious associations they have with the product, we often conduct focus groups with consumers from target Portrait segments, which allows us to build a deeper understanding not only of how the brand is viewed in general, but also how it fits into the wine drinking habits of the specific consumers for whom it is intended.

NEW PRODUCT TESTING

Newly developed products can be tested with target consumers in a variety of ways. In addition to focus groups, wine companies often ask us to test their product with a larger sample of consumers through hall tests, where we recruit consumers from the target Portrait group to taste the product and provide their feedback on the taste and style.

LABEL AND PACKAGING TESTING

To assess how a label or packaging design is positioned relative to its competitors, or how a new label design is perceived by consumers, we often use a combination of focus groups with target consumers to explore their reactions to the packaging combined with label testing with a representative sample of Australian wine drinkers through our Vinitrac® survey platform. This allows us to see both how the packaging performs overall, and, importantly, how it performs among its core Portrait group.

- The Wine Intelligence involvement scale is the result of calculating one score per respondent based on the answers they give to four measures:
 - “I like to take my time when I purchase a bottle of wine”
 - “Wine is something important in my lifestyle”
 - “Drinking wine gives me pleasure”
 - “I have a strong interest in wine”
- Scales have been drawn from Laurent and Kapferer, 1985, Mittal and Lee, 1989, Lockshin *et al*, 1997

- The data for this study was collected in April 2011, October 2011 and May 2012
- Data was gathered via Wine Intelligence's Vinitrac[®] online survey with 3,525 Australian regular wine drinkers
- Methodology: online surveys
- Sampling strategy: quotas (age, gender, Australian states), stratified
- Screening criteria: legal drinking age; drink wine at least once per month; and drink red, white or rosé wine
- The survey was post-weighted to be representative of Australian regular wine drinkers in terms of gender, state of residence and age

- Qualitative data for this report was collected primarily through a programme of in-house focus groups with target consumers
- The most recent set of qualitative data was gathered in December 2010 and January 2011
 - Duration: 1.5 hours per group
 - Location: Melbourne, Townsville and Sydney
- 5 focus groups were conducted with the four Portrait groups with the highest level of involvement with wine: Adventurous Connoisseurs, Developing Drinkers, Contented Casuals, and Mainstream Bargain Hunters

REPORT PRICE: GBP 2,500 or 5 Report Credits for a single-user licence

Format:

- Management Summary: 22 page PowerPoint (PDF)
- Handbook: 59 page PowerPoint (PDF)
- Data files (Excel)

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