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BEGINS

**North American consumer love affair with wine continuing, with new consumer trends emerging, according to latest Wine Intelligence research**

*A few years on from Wine Intelligence's groundbreaking Portraits segmentations of US and Canadian wine consumers, new versions show that the behaviour and preferences of US and Canadian wine consumers have evolved in important ways*

American and Canadian wine drinkers are continuing their love affair with wine, despite the challenging economic climate, according to new research published today by Wine Intelligence.

However there are some important contrasts in the behaviour of these two similar - and valuable - markets that wine brand owners should be aware of if they are to achieve success in these important consumption markets.

The two Wine Intelligence reports, **Portraits USA 2010** and **Portraits Canada 2010**, both published today, show the latest trends in consumer segmentation and how consumer behaviour is changing in both markets.

The key finding in the USA is the identification of a new segment of consumers, Experienced Explorers, who, as well as being a valuable segment in their own right, perform a pivotal role in giving momentum to new market trends. The segment accounts for 17% of monthly wine drinkers but almost a third of all spend in the category.

As older (average age: 49) and more confident wine drinkers, Experienced Explorers also exert significant influence over younger and/or less experienced peers when it comes to new styles of wine - particularly the valuable - and rapidly growing - Millennials, according to Erica Donoho, Wine Intelligence's USA country manager.

"As the name suggests, Experienced Explorers are willing to try new things, especially if it's a recommendation from a trusted source," says Donoho. "The Millennials tend to follow the Experienced Explorers when it comes to wine. They're their bosses and older work colleagues."

America's Millennials, the monied under-30s who have been the hot news in the wine category for the past five years because of their willingness to spend far more on a bottle of wine than most of their older peers, are still an important segment in their own right, but still only account for 13% of spend on wine, according to Portraits USA 2010.

Donoho adds that the wine industry needs to keep the Explorers happy to sustain the growth in the category as a whole: "We don't want them in their busy lives to run out of time for the wine category, stop talking about it to their friends, and just rely on their old favourites," she says.

In Canada, the main news is that younger consumers are developing their taste for wine, but their behaviour tends to more closely resemble their more frugal and low involvement young adult

counterparts in Europe, rather than the free-spending and highly involved US Millennials, according to Lulie Halstead, chief executive of Wine Intelligence.

“In Canada we see far more of what we call Risk-averse Youngsters - younger consumers turning more to wine, but the typical behaviour there is playing safe, not getting to “into” the category, and treating it as just another beverage,” Halstead says.

However Halstead adds that Canada, whilst a lot smaller than the US in terms of wine market size (16 million monthly wine drinkers vs 74 million in the US) offers other opportunities to brand owners: a population more open to different styles of imported wines, a healthier economic situation, and a very clear route to market via the state liquor control boards.

Portraits USA 2010 and Portraits Canada 2010 are available from Wine Intelligence as .pdf downloads, each priced at £2,500 / US\$3,750 / Euros 3,100 for a single user licence. Order online today at [www.wineintelligence.com](http://www.wineintelligence.com) or contact [natasha@wineintelligence.com](mailto:natasha@wineintelligence.com) for more information.

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#### Notes for editors

#### **How the data was collected**

The new reports are the culmination of surveys with more than 6,000 USA and 2,000 Canadian regular wine consumers over the past 12 months, plus focus groups, online groups, accompanied shops and depth interviews. The final output is based on extensive statistical modelling.

The quantitative data was collected by Vinitrac® - Wine Intelligence's unique online wine consumer omnibus survey. For more information about Vinitrac® please contact us.

#### **About Wine Intelligence Ltd**

Wine Intelligence is the leading research-led strategy consultancy serving the global wine industry. It conducts client-specific research projects to enable companies to gain greater insights into wine markets and wine consumers, and helps business leaders develop business strategy and marketing plans. The company also assists businesses in developing new brands, and in formulating and communicating marketing messages within the industry. For more information, please visit [www.wineintelligence.com](http://www.wineintelligence.com).

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