



Portraits



USA | 2014

REPORT PRICE: USD 4,125 or 5 Report Credits*

1 REPORT

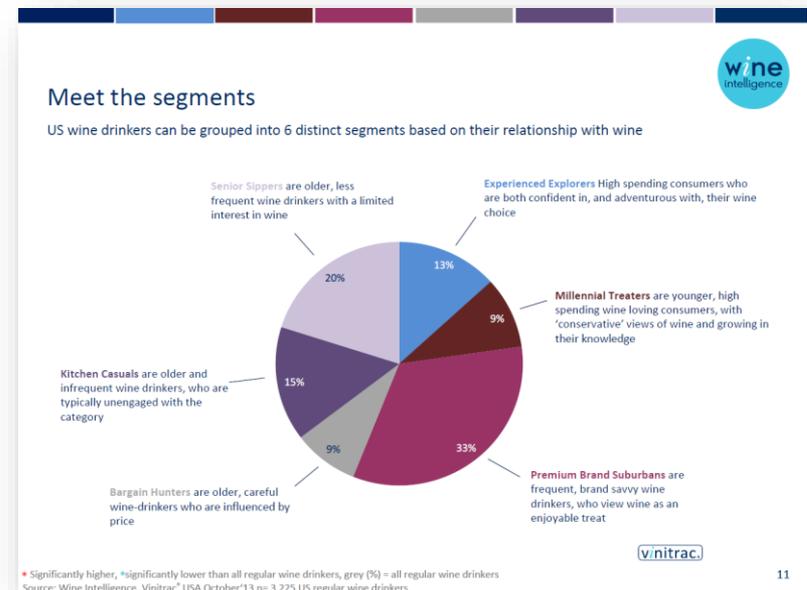
- >> Introduction to USA Portraits, including market overview, segment size, value, and changes to segment since 2010
- >> A more detailed description of each of the segments and their relationship with wine
 - Overview of the groups
 - Detailed description of each group
 - Experienced Explorers
 - Millennial Treaters
 - Premium Brand Suburbans
 - Bargain Hunters
 - Kitchen Casuals
 - Senior Sippers
 - Methodology & Appendix

2 PROFILING TABLES

What is USA Portraits?



- To help wine businesses better target their consumers, Wine Intelligence has developed a segmentation of USA regular wine drinkers, which we call Portraits
- We use latent class analysis to group consumers who have similar levels of spend on wine per occasion, frequency of wine consumption per occasion 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



Excerpts from the introduction



“The United States is the largest market for wine on Earth. Given the size of the population (320 million, and rising) and the fact that this is the world’s largest economy, this may not come as much of a surprise. Perhaps more interesting is the speed at which wine has advanced from a peripheral beverage consumed predominantly by older, affluent consumers in coastal cities, to a mainstream drink which now reaches nearly two thirds of the adult population.”

“Wine Intelligence identifies six consumer types, or Portraits, which between them classify the behaviors of the monthly wine drinking population currently estimated at 90 million. These groups vary considerably in all kinds of ways. They have different relationships with wine. Some – the group we call Experienced Explorers – are experimental in their choices and will pay top dollar for the right bottle. Kitchen Casuals, by contrast, are generally more concerned about a bargain than where a wine comes from.”

“Since the 2010 US Portraits study there has been a noticeable shift in the tectonic plates of the American wine market. In some ways not much has changed – the proportion of Experienced Explorers, Millennial Treaters, Bargain Hunters and Kitchen Casuals is not far off where it was four years ago. But it’s a very different story when it comes to the largest Portrait group of all: the Premium Brand Suburbans.”

“It’s inevitable that any reader of the 2014 US Portraits study is going to fixate on this consumer group, and it’s hard to deny that Premium Brand Suburbans are a marketing professional’s dream. Yet for all their dynamism and influence on the market, it’s important to keep things in perspective. The other two-thirds of American wine drinkers deserve attention too.”

Graham Holter
Associate Director, publishing
Wine Intelligence

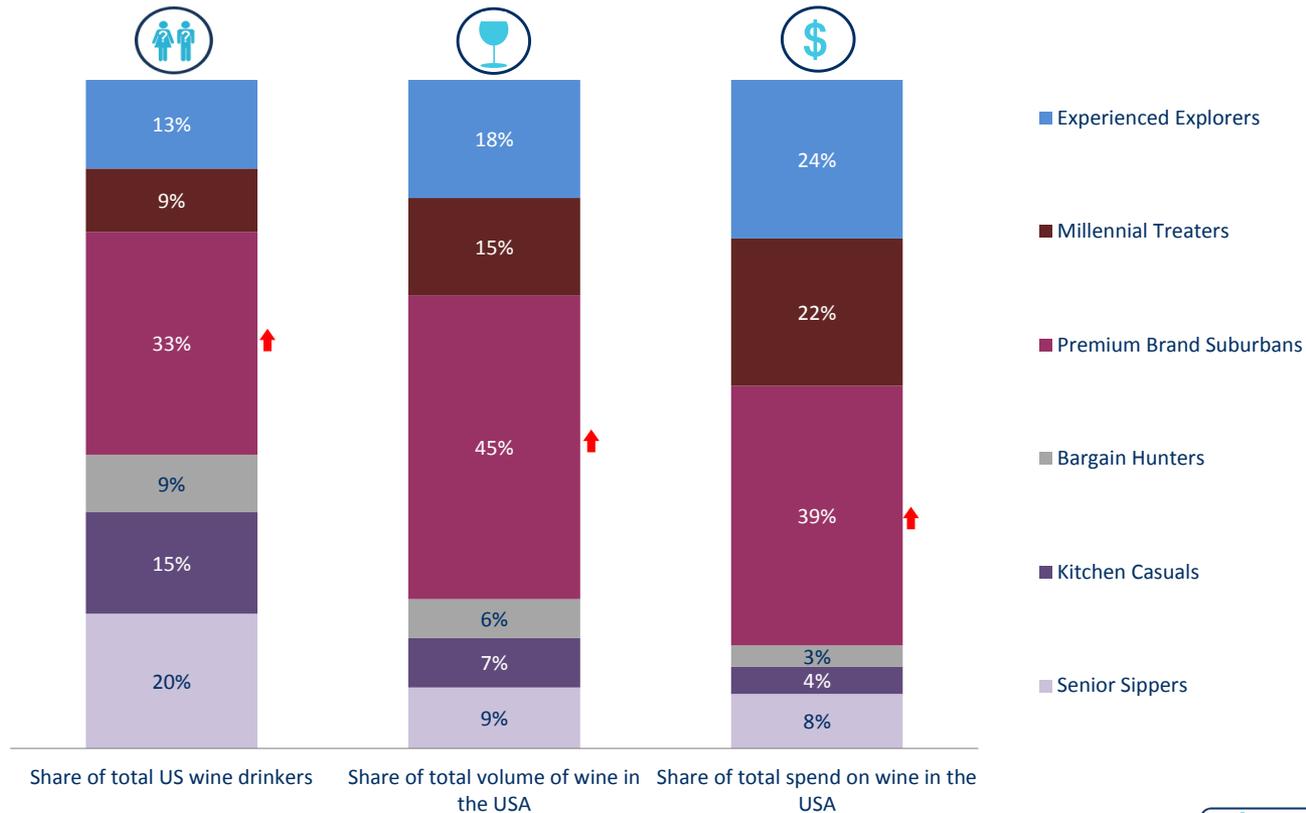


USA Portraits segments by share of total US regular wine drinkers, volume and value



Relative importance of segments

Share of population, total market volume and total market value
Base=All US regular wine drinkers



↑ significantly higher than 2010, ↓ significantly lower than 2010

Source: Wine Intelligence, Vinitrac® USA, Nov. 2010, n=3,013, Oct. 2013, n=3,225 US regular wine drinkers



- Data collection:
 - The data for this report was collected in November 2010, and October 2013
 - Data was gathered via Wine Intelligence's Vinitrac® USA online survey and is representative of all US regular wine drinkers
 - Sampling: quotas / stratified

- Screening criteria:
 - Respondents were required to drink wine at least twice per month, to drink at least red, white or rosé wine and to buy wine in the off-premise and/or in the on-premise

- Data processing:
 - Invalid responses (those who completed the survey too quickly, or who “straight-lined” through selected questions) were removed from the sample
 - The survey was post-weighted in terms of age and gender

- The most recent set of qualitative data was gathered in February and March 2014
- February 2014: 4 focus groups were conducted with Millennial Treaters and Premium Brand Suburbans in Delaware
- March 2014: 4 focus groups were conducted with Experienced Explores, Premium Brand Suburbans, and Millennial Treaters in New York
- Duration: 1 hour per group

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