



Portraits



US | 2016

REPORT PRICE • USD 3,500 • GBP 2,500 • AUD 4,750 • EUR 3,250 • 5 Report Credits

Report price



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 5

Price also includes
profiling data in Excel
 (All Vinitrac® questions with cross-tabulations by the segments)

89 page
 PowerPoint
 report

Introducing the Portraits groups: Overview
 The six segments primarily differ from each other on 3 main dimensions: wine consumption frequency, typical spend, and involvement in the category

Frequency
 Kitchen Casuals, Bargain Hunters, Premium Brand Suburbans, Senior Sippers, Experienced Explorers, Millennial Treaters

Spend
 Kitchen Casuals, Bargain Hunters, Premium Brand Suburbans, Senior Sippers, Experienced Explorers, Millennial Treaters

Involvement
 Kitchen Casuals, Bargain Hunters, Premium Brand Suburbans, Senior Sippers, Experienced Explorers, Millennial Treaters

Brands you might find them drinking
 MICOCO, Yellow Tail, Gallo, SUTTER HOME, DOG POINT, 19 Crimes, KENDALL-JACKSON, ROBERT MONDAVI

Key changes since 2013
 • Decrease in share of both market volume and value in the on- and off-premise
 • Drinking less red and white wine, and less alcohol generally
 • In non coastal states buying less in supermarkets
 • Drinking less in bars, yet not less in the on-premise overall, with on-premise spending in fact having gone up
 • In general, interest in wine is growing, yet so is the feeling that it is expensive

Bargain Hunters
 • Slightly higher off-premise spend
 • Drinking less at dinner parties or celebrations at home
 • Drinking less in bars, but spending more when dining in restaurants
 • Less influenced by promotions, and more influenced by country and region of origin

Senior Sippers
 • Slight decrease in volume and value, especially in the on-premise
 • Overall consumption waning, with off-premise spend similar
 • On-premise spend is up for most occasions tested, especially at parties and celebrations

Millennial Treaters
 • Drinking less red and white wine, and less alcohol generally
 • In non coastal states buying less in supermarkets
 • Drinking less in bars, yet not less in the on-premise overall, with on-premise spending in fact having gone up

Kitchen Casuals
 • Less affluent - decreasing income
 • Drinking even less in restaurants (22%*)
 • Increasingly concerned about knowing the brand, ABV%, and about the appeal of the label design

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Excerpts from the introduction



“There is a temptation in marketing to fix on a certain way of looking at consumer data – say, explaining the behaviour of a market on the basis of age – and become captivated by this narrative. Thus we have marketers confidently explaining changes in a market in terms of the influence of “Millennials” or “Boomers”. While this can be a correct interpretation in some instances, all too often it turns out to be a crude approximation of what’s really happening.”

“The best consumer data connects us to real-life people, each an intricate and unique blend of behaviours and attitudes. It is this ‘data DNA’, particular to each and every consumer, that provides us with the contextual information we need to gain a comprehensive understanding of who they are and why they behave the way they do, and allows us to walk vicariously in their shoes for a while, and imagine how they might react to a new product or service.”

“US Portraits, our segmentation of American wine consumers, is an exercise in mapping this data DNA in an attempt to ground the abstract, to do justice to the complexity and interrelatedness of consumer behaviour. In short, to provide a context that gives a face to US regular wine drinkers.”

“In addition to painting a vivid picture of US regular wine drinkers in 2016, by comparing our data from this year with previous data from 2013, we are in a position to observe the direction in which these personalities are evolving. Millennial Treaters are, for example, shifting their spending increasingly online, and Premium Brand Suburbans are drinking less alcohol generally. Ironically, however, this sustained exercise in segmentation also permits us to triangulate our data and corroborate our hypotheses with view to drawing conclusions about the evolution of US wine consumers as a whole. As we see since 2013, most groups are either drinking or spending more in the on-premise, and most are tending towards a greater interest in the category, regarding wine as more important to their lifestyle or taking more care when choosing it. This suggests that wine is incrementally securing a more central position in the lives of US drinkers.”



*David Thompson
Project Executive
Wine Intelligence*

What is US Portraits?



- To help wine businesses better target their consumers, Wine Intelligence has developed a segmentation of US 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



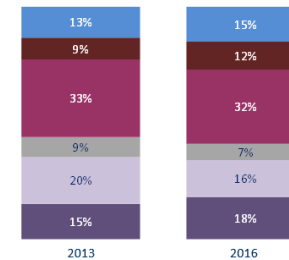
Meet the portraits

US regular wine drinkers can be grouped into 6 distinct segments, based on their relationship with wine



Share of population, 2013 vs 2016

Base=All US regular wine drinkers (n=3,841)



Experienced Explorers are high spending consumers who are both confident in, and adventurous with, their wine choice

Millennial Treaters are younger, high spending, wine loving consumers, with 'conservative' views of wine and growing in their knowledge

Premium Brand Suburbans are frequent, brand savvy wine drinkers, who view wine as an enjoyable treat

Bargain Hunters are older, careful wine-drinkers who are influenced by price

Senior Sippers are older, less frequent wine drinkers with a limited interest in wine

Kitchen Casuals are older and infrequent wine drinkers, who are typically disengaged with the category

Source: Wine Intelligence Vinitrac® US, October 2015 and January 2016, US regular wine drinkers (n=3,841)

vinitrac 11

How can I use Portraits?

Objectives

The Portraits report series has two main objectives:

1. Help to **identify your target consumers**
2. Provide a detailed understanding of those consumers, including:
 - **Who** they are
 - **Why** they drink wine
 - **What** they drink
 - **Where and how** they buy wine
 - **How** you can target them

This report identifies the higher value, mid-value and lower value consumer groups in the wine market, and provides detail on the preferences and behaviours of each segment in order to help you to identify the right target group for your product. This analysis can then be combined with an analysis of the competitive landscape to build a decision of which consumers to target.

The segmentation model can be used to identify and understand target consumers, and to map on to brand, portfolio and channel strategies. Reading the report, it is important to note that each consumer group has its own needs and merits. Higher value consumers may offer a tempting target because they tend to buy more expensive wines more frequently; on the other hand they tend to have broad portfolios and the competition for their attention is intense. Lower value consumers may shop for wine less often and spend less, but can still represent significant opportunities for producers whose strengths align with lower cost, consumer-friendly products.

Putting findings into practice

Once you have decided on your target and built an understanding of who these consumers are, there are a number of ways to apply this understanding to better target your key customers. In the past, wine companies have used Portraits to inform:

- Packaging and label design
- Brand positioning
- Advertising and marketing communications
- Channel strategy
- In-store positioning and layout

Quantitative Methodology

- The quantitative data for this study was collected in two surveys, October 2015 and January 2016
- Quantitative data was gathered via Wine intelligence's Vinitrac® online surveys with 3,841 US regular wine drinkers
- Respondents were required to drink wine at least once per month, to drink red, white or rosé wine and to buy wine in the off-premise and/or in the on-premise
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The surveys were post-weighted to be representative of US regular wine drinkers in terms of age, gender and region
- The distribution of the sample is shown in the table:

Qualitative Methodology: Online community & focus group



Online community methodology

- A 5-day online community discussion with 12 x **Experienced Explorers**, **Millennial Treaters**, and **Premium Brand Suburbans** was conducted in May 2016
- The online community discussion last approximately 2 to 2.5 hours per day over a week, covering general wine drinking behavior and preferences, motivations and attitudes towards wine, purchase choice cues and shopping exercise
- Respondents were also encouraged to upload pictures of wine they have drunk or their favorite wine drinking occasions

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Format: 89 page PowerPoint (PDF) + supporting data table (Excel)

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