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# PORTUGAL LANDSCAPES

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February 2019 Report

wine  
intelligence



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### Report price:

GBP 2,500

USD 3,300

AUD 4,700

EUR 2,900

5  
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The Portugal Landscapes 2019 report includes:

- Report with the latest information regarding the Portuguese wine market, supported by:
  - Wine Intelligence Vinitrac®
  - Wine Intelligence market experience
  - Secondary sources
  - Trade interviews
- User-friendly data table with all the measures from Vinitrac® showing significances, cross tabulated with:
  - All Portuguese regular wine drinkers in 2018
  - Gender groups
  - Age groups
  - Regions / districts
  - Income
- Tracking data 2013 vs. 2018
- Hot Topics – Port wine analysis and age profiling

Despite being one of the most traditional markets for wine, the category in Portugal continues to grow sustainably, year on year, even within the context of a market where the per capita consumption of wine is already amongst the highest in the world. Evidence suggests that this, in part, is being driven by the recent boom in tourism and also by the economic recovery, after years of financial crisis.

This is the second edition of Portugal Landscapes, which includes in-depth input from both Portuguese wine drinkers and trade experts.

Wine markets, and in particular more traditional markets such as Portugal, do not change quickly or dramatically. Within this context, there is a particularly notable trend in the Portuguese wine market: there has been a significant reduction in the proportion of wine drinkers who are purchasing the large scale, mainstream wine brands. This shift is, in part, driven by the emergence of many new brands into the market over the past few years, contributing to the increasingly competitive environment.

Many of these newer brands are using quality cues and words such as 'premium', 'signature' or 'master selection', leading to the consumer perception of these brands being premium and often being priced at a premium level (e.g. €12), but discounted up to 70% in supermarkets. Our evidence indicates that consumers have been opting for these 'bargains', letting go of the bigger, more traditional brands.



**Luis Osório**  
Senior Manager

# Management summary

## Key trends in the Portuguese wine market



1. Increasing competition in a growing wine market
2. Brands becoming more premium in terms of positioning and design, yet are often heavily discounted, so disrupting price vs. quality expectations
3. Wine drinkers retreating from mainstream brands
4. The classical retail channels, supermarkets and hypermarkets, continue to dominate and retain the 'power' in this market
5. Consumers becoming more open to explore a broader range of wine types and styles
6. Rise in the enjoyment of wine in the home

- The data for this survey was collected in Portugal in November 2017 and November 2018
- Data was gathered via Wine Intelligence's Vinitrac<sup>®</sup> online survey:
  - 1,000 Portuguese regular wine drinkers (November 2017)
  - 1,000 Portuguese regular wine drinkers (November 2018)
- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The data is representative of Portuguese regular wine drinkers in terms of gender and age
- The distribution of the sample is:

		Portugal	
		2017	2018
		<i>n=</i>	<i>1000</i>
Gender	Male	50%	50%
	Female	50%	50%
	TOTAL	100%	100%
Age	18-34	13%	13%
	35-49	28%	29%
	50-64	30%	29%
	65+	29%	29%
	TOTAL	100%	100%

Source: Wine Intelligence, Vinitrac<sup>®</sup> Portugal, Nov 2017 (n=1000), Nov 2018 (n=1000) Portuguese regular wine drinkers



### Trade interview methodology

- Trade Interviews were conducted with six experienced industry professionals in the Portuguese wine trade in January 2019
- Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing
- The six interviewees were members of the wine trade working in different roles:
  - *3 x Producers*
  - *1 x Distributor*
  - *1 x Regional Association*
  - *1 x Retailer*

## How does Vinitrac<sup>®</sup> work?

### 1) Defining the right samples:

- Wine Intelligence, with the support of global research companies (e.g. TNS, YouGov), regularly runs calibration studies in each market in order to define demographic specifications of the wine consumers and the size of the market (i.e. penetration of wine consumption)

### 2) Running the online survey:

- Invitations to participate in an online survey programmed by Wine Intelligence are then distributed to residents in each market
- Respondents are directed to a URL address, which provides access to the online survey
- Based on given criteria (e.g. age, beverage, frequency of wine consumption) respondents will either proceed or screen out of the survey
- Wine Intelligence monitors completed responses to build samples representative of the target markets' wine drinking population based on the most recent calibration study

### 3) Cleaning the data:

- When a representative sample is logged, the survey is closed
- Wine Intelligence will then clean out all invalid data points (e.g. those who sped through the survey or gave inconsistent answers to selected questions) and weight the data in order to ensure representability



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