



WINE INTELLIGENCE
US PORTRAITS 2021

JANUARY 2021

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PRICING



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How Portraits works

What are Portraits?

- Portraits are a series of wine attitudes and behavior segmentations by Wine Intelligence, providing wine businesses with a reference segmentation of wine drinkers which can be applied to individual brands, regions, countries of origin, style categories and retailers
- US Portraits 2021 is the 7th edition of our US Portraits. Portraits are also available for the UK, China, Australia and Canada

How we develop Portraits...

- Wine Intelligence uses factor and cluster analysis to group consumers into distinct segments based on their answers to questions about their wine-drinking behavior and their attitude towards wine. Once consumers have been identified as belonging to a specific segment, these segments are profiled based on a set of output variables, which in addition to the input variables include demographic information and more detailed questions on wine-drinking behavior
- Portraits are developed using an integrated research methodology utilizing both quantitative and qualitative inputs
 - **Quantitative:** Analysis for US Portraits is based on a sample of 10,000 US regular wine drinkers collected in July and October 2020 via Wine Intelligence's Vinitrac® online survey. Comparisons for some measures were made against the previous US Portraits 2018 report
 - **Qualitative:** Focus groups were conducted across the US in November and December 2020 (see Appendix for details of the qualitative research methodology)

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DATA TABLE DETAILS



Data table includes:

- Profiling by US Portraits
- Additional sections for e-commerce, SOLA (sustainable, organic and lower alcohol wines) and education
- All significances highlighted

Example screenshot of data table:

Data will not be blurred when you receive the report

Source: Wine Intelligence, Vintrac® US, October 2020 (n = 10,000) US regular wine drinkers

Red / Blue: Statistically significantly higher / lower than all regular wine drinkers in the US at a 95% confidence level

Grey cells: Small sample size (n < 50)

		US regular wine drinkers	Engaged Explorers	Generation Treaters	Mainstream Suburbans	Social Newbies	Senior Bargain Hunters	Kitchen Casuals
Sample size n=		10,000	1,290	1,130	2,308	1,456	2,043	1,773
Share of regular wine drinking population		100%	13%	11%	23%	15%	20%	18%
Share of total volume of wine in the US		100%	20%	20%	26%	16%	9%	9%
Share of total value of wine in the US		100%	28%	23%	19%	18%	6%	6%
Share of spend in the off-premise		100%	27%	17%	24%	16%	7%	10%
Share of spend in the on-premise		100%	29%	29%	15%	20%	5%	2%
Section A - Demographics								
Gender	Male	54%	58%	72%	46%	58%	43%	46%
	Female	46%	42%	28%	54%	42%	59%	54%
Age (6 groups)	21-24	8%	9%	8%	6%	15%	7%	7%
	25-34	21%	26%	37%	17%	28%	14%	15%
	35-44	20%	28%	37%	18%	21%	13%	14%
	45-54	24%	17%	13%	16%	14%	18%	14%
	55-64	15%	11%	7%	15%	11%	12%	21%
	65 and over	29%	10%	1%	26%	11%	1%	5%
Age (3 groups)	21-34	29%	30%	45%	23%	23%	1%	1%
	35-54	49%	45%	50%	50%	50%	1%	1%
	55 and over	22%	25%	5%	27%	27%	1%	1%
Age (generations)	21-24 (Gen Z)	8%	9%	8%	6%	15%	7%	7%
	25-39 (Millennials)	31%	33%	57%	27%	27%	1%	1%
	40-54 (Gen X)	24%	17%	13%	16%	14%	18%	14%
	55 and over (Boomers)	37%	44%	2%	51%	48%	1%	1%
States	California	14%	18%	16%	10%	10%	1%	1%
	Florida	9%	9%	10%	9%	10%	1%	1%
	New York	8%	10%	12%	8%	8%	1%	1%
	Texas	8%	10%	11%	8%	8%	1%	1%
	Pennsylvania	4%	6%	3%	3%	3%	1%	1%
	Illinois	4%	5%	3%	3%	3%	1%	1%
	New Jersey	3%	3%	3%	3%	3%	1%	1%
	Georgia	3%	3%	3%	3%	3%	1%	1%
	North Carolina	3%	2%	1%	1%	1%	1%	1%
	Ohio	3%	2%	2%	2%	2%	1%	1%
	Washington	3%	2%	3%	3%	3%	1%	1%
	Arizona	3%	3%	1%	3%	3%	1%	1%
	Missouri	3%	3%	2%	3%	3%	1%	1%
	Virginia	2%	2%	2%	2%	2%	1%	1%
	Massachusetts	2%	2%	2%	2%	2%	1%	1%
	Michigan	2%	1%	2%	2%	2%	1%	1%

Wine Intelligence market experts are available to help you understand the data table

INTRODUCTION



Consumer behavior is not typically a fast-changing affair. Habits are formed over long periods and last a long time, even after the rationale for those habits has long gone. Witness the ritual of many people over the age of 50 paying for a daily newspaper to be delivered, reporting yesterday's news, while their children have already read, forwarded and commented on yesterday's news and have begun retweeting today's news.

Sometimes, however, things do change faster than we had anticipated. We are now so comfortable with the world of entertainment delivered to us via Netflix et al., that the fact that this happened relatively quickly doesn't surprise us, because in the context, it seems logical.

Today's context is also important. The arrival of a global pandemic has heralded changes in US wine drinker behavior that were already present in the nation's habits previously – they were just accelerated and promulgated by Covid-19.

Nowhere is this change more apparent than in the emergence of a new wine drinking segment in the Wine Intelligence US Portraits segmentation for 2021. This new segment, Generation Treaters, are largely the educated, urban Millennials, working in the new economy and starting to settle down and raise families. They are transitioning their drinking habits from primarily on-premise socializing and hedonic nights out, into a more everyday, at home existence.

Generation Treaters' precursors from our previous study in 2018 are the younger end of the most knowledgeable and high spending segment of US consumers, whom we dub Engaged Explorers, and the younger end of another group called Contented Treaters, who are higher spending but more occasional drinkers. In the 2021 segmentation, the Contented Treaters have disappeared entirely, swallowed up by Engaged Explorers (who are now older) and by Mainstream Suburbans, an older-leaning segment of drinkers who tend to drink wine regularly but stick to more value and mainstream prices.

Our new Millennial-flavored Generation Treaters are among the most frequent wine drinkers, but they are not the highest spenders. They are building their wine knowledge, but currently know relatively little about the category, relying on technology, friends or the aesthetics of labels to guide their choices. In normal times this group would still be going out to bars and restaurants (though less often than they used to because they would now have to pay for a sitter). However, in today's world they are most likely working from home and less able to (or inclined to) spend lots of money on vacations and evenings out. Instead, our Generation Treaters are buying wine more regularly, drinking it more often than they used to at non-food occasions and experimenting confidently with new styles, without always knowing exactly what they are drinking.

Some of this direction of travel is down to Covid-19, but by no means all. The US wine market has been evolving as the 21st Century has worn on, with Boomers slowly moving aside from their previous dominance of the category, allowing Gen-X and now Millennials to influence what is sold and how it is sold.

Our new Generation Treaters segment is also helping to shift drinking behavior towards a more low- alcohol, lower calorie, responsible, in control process. This isn't always manifested in alcoholic beverages labelled 'low alcohol' although that can help – witness the growth of the hard seltzer category.

So how will our new segments influence the wine category over the next three years? Most likely they will care about the things that also matter in their broader existence. Unlike their parents, Generation Treaters are more motivated by concepts such as sustainability and aesthetics, and less by low prices. They won't say no to a bargain (who would?) but for them, a good deal means more than just cash saved. It is about the value embedded in the product itself – the story, the look of the bottle, the values of the people who made it, or some combination thereof.



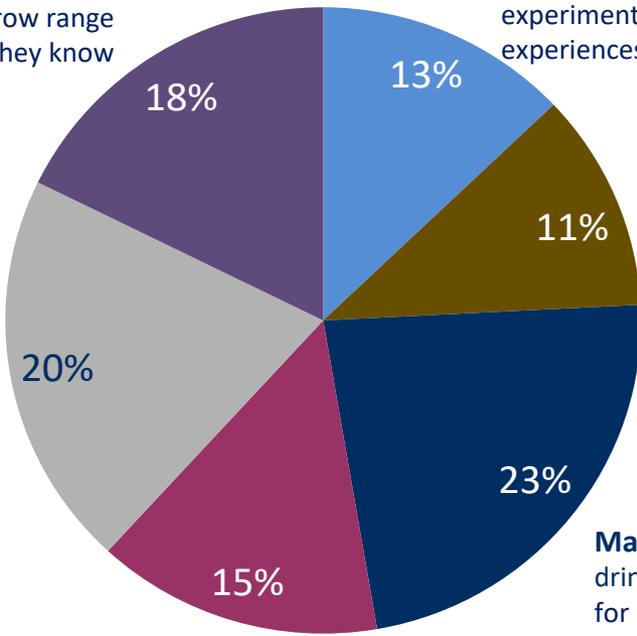
US PORTRAITS: WINE DRINKER SEGMENTATION (2021)

% share of US regular wine drinkers by Portraits segments US 2021

Kitchen Casuais: One of the oldest segments, they are infrequent and low-spending wine drinkers, with very few consuming wine in the on-premise. They show a limited interest in the wine category, sticking to the narrow range of wines they know

Senior Bargain Hunters: The least frequent and oldest wine drinking segment. Time in the category has led to relatively strong wine knowledge, however they purchase from a narrow repertoire of wine styles and brands, being strongly value driven

Social Newbies: The youngest segment, drinking wine quite frequently (on average twice a week), who are mid to higher spenders with wine not yet fully integrated into their lifestyle. They have limited wine knowledge and rely heavily on recommendations when it comes to buying wine and they are usually happy to drink what is poured for them



Engaged Explorers: A younger to mid-aged segment (typically Millennial and Gen X), they are one of the most frequent wine drinking segments and the highest spenders on wine, buying from a broad repertoire of wine styles, countries and regions. The most experimental group, actively seeking opportunities to build wine experiences with highest wine knowledge and confidence

Generation Treaters: One of the younger segments (mainly Millennials), who are the most frequent drinkers but only mid-range spenders. They have lower levels of wine knowledge due to being 'newer to wine drinkers', but are confident drinkers who are exploring and learning about the category, open to trying a wide variety of wine types

Mainstream Suburbans: Mid and older aged drinkers, who are frequent wine drinkers (mainly for informal occasions), yet among the lowest spenders per bottle. Their time spent in the category leads to high wine knowledge and confidence and they enjoy drinking a broad range of more mainstream wines

Sources: Wine Intelligence, Vinitrac® US, July and October '20, (n=10,000) US regular wine drinkers Wine Intelligence, consumers interviews

EXAMPLE SLIDE: ENGAGED EXPLORERS



WHO

- Affluent career- and family-focused, college-educated Millennials and Gen Xs, who are enthusiastic about wine

INTERESTS AND VALUES

- Knowledge, education, staying informed
- Sustainability, 'local' & giving back
- Open-minded & curious
- Enjoying life to the fullest
- Savvy, choosing quality over quantity

RELATIONSHIP WITH WINE

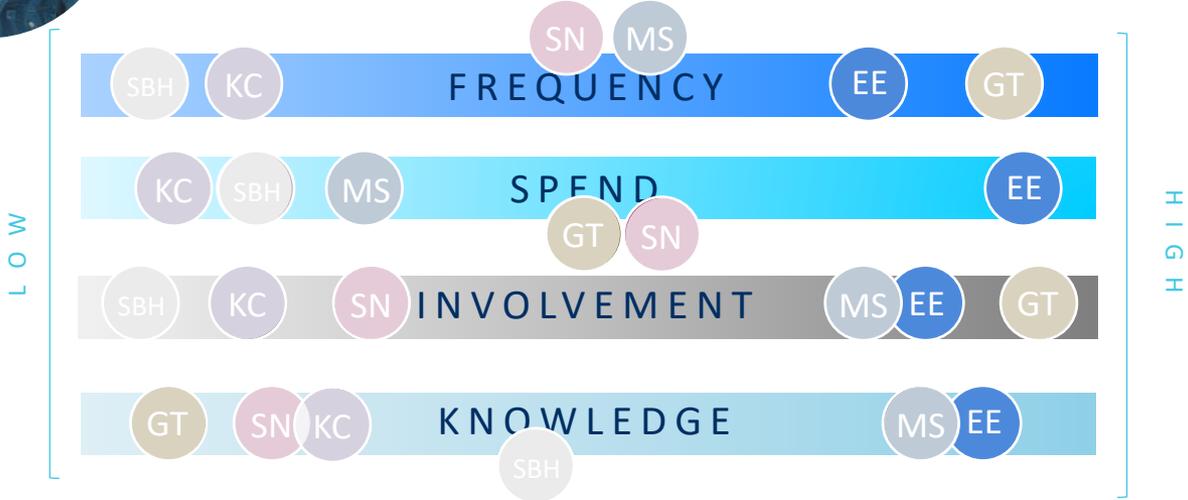
- Valuable.** Highest spenders on wine (per bottle)
- Frequent drinkers.** Most frequent drinkers for less formal and more low-key occasions both at home and in the on-premise
- Confident & curious.** Highest wine knowledge and confidence levels, heavily engaged with the category, a personal and social interest

HOW TO ENGAGE THEM WITH WINE

- Social experiences** e.g. tastings, dinners, events
- Discovery opportunities** e.g. wine clubs, samples
- Exclusivity** e.g. limited releases, member-only opportunities
- Clear 'value' equation** e.g. good ratings, reviews / recommendations

KEY CHALLENGE FOR WINE BRANDS

- Building loyalty & staying interesting.** They enjoy exploring new wines and may forget something they loved



WHERE THEY SHOP
Broadest range of wine buying channels including online



BRANDS THEY DRINK
Prefer smaller vineyards, but open to mainstream brands such as...



They will check most of these statements

- ✓ Happy to spend over \$25 / bottle (in off-premise) & \$40+ / bottle in the on-premise
- ✓ Varied range of wines at home – from mainstream brands to niche vineyards
- ✓ A dedicated place to storing wine – wine fridge, cellar, or even just a cupboard
- ✓ Look forward to shopping for wine
- ✓ Lights up at a long wine list in on-premise
- ✓ Proactively learns about wine
- ✓ Attends social events focused on wine
- ✓ Part of a wine club
- ✓ Uses a wine related app – probably Vivino



EXAMPLE SLIDE:

ENGAGED EXPLORERS: MOTIVATIONS FOR DRINKING WINE



Wine is an exciting world to explore, both personally and socially



Why do they drink wine?

- Wine is much more than a functional product to this segment; **exploring the world of wine** opens up new adventures and experiences – they enjoy the complexity of the category
- Wine is both a **personal AND social interest** – they find it fun and interesting to broaden their own knowledge, and enjoy sharing, discussing and deepening their understanding with like-minded friends – casually over dinner and drinks, or even more formally at organized wine tasting events. For the most involved within this segment, wine is a hobby that is closely linked to their identity – it's what they love and what they are 'known for'
- They love **trying different wines** (more so than drinkers in other segments) – whether from a well-known region they are less familiar with, or a completely niche / new varietal or region. They seek out new, interesting and enjoyable taste experiences, as well as unique wine knowledge to share with others



"One of the happiest moments in my life so far was when Champagne Producer Eric Rodez followed me on Instagram"
Engaged Explorer, Male, NY

EXAMPLE SLIDE:

ENGAGED EXPLORERS: ONLINE AND DTC CHANNELS FOR WINE

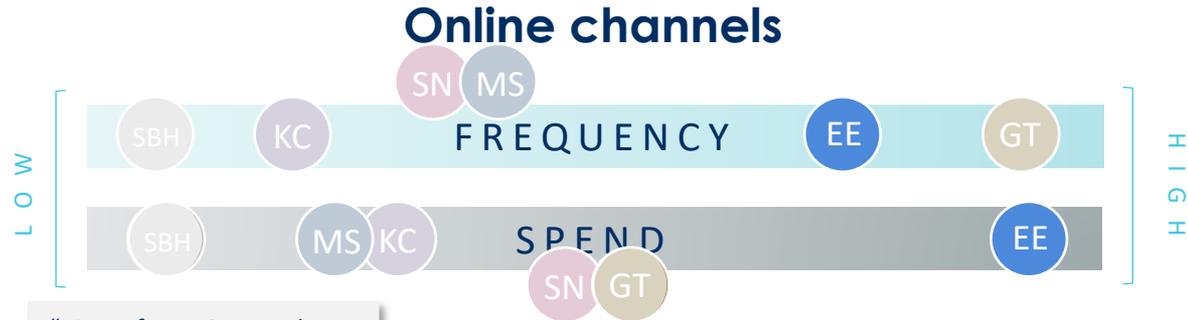


Shopping for wine online is a convenient way to buy wines they can't find in local shops



Online wine buying behavior

- The majority of them (72%) buy more wine online compared with a year ago, now doing so more often than once per month and spending more per bottle on average than other drinkers when purchasing online
- They look for convenience and exclusivity when making online wine purchases, searching first for the ability to buy their wine with the weekly grocery shop while also looking for wines they wouldn't be able to find in a brick-and-mortar store



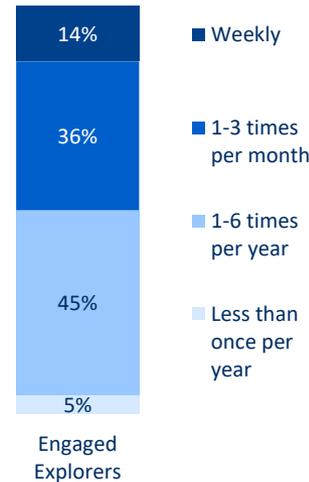
"Most of my wine purchases are online because the wines that I want are often unavailable unless I'm purchasing directly from the producer or a member of a wine club"
 Engaged Explorer, male, NY



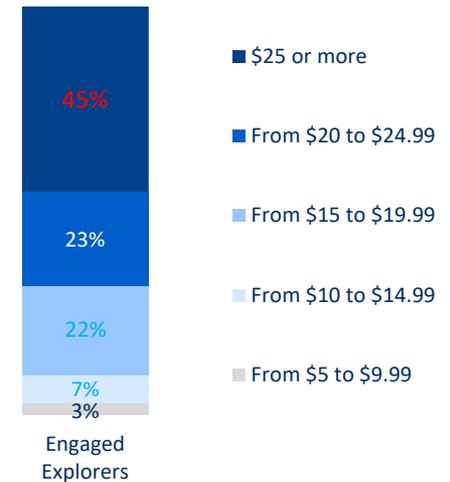
Triggers to purchasing wine online



Online purchase frequency



Online spend on wine



(%): All US RWD
 % / % Statistically significantly higher / lower than all US regular wine drinkers at a 95% confidence level
 Source: Wine Intelligence, Vinitrac® US, July and October 2020, (n=10,000) US regular wine drinkers
 Wine Intelligence, consumers interviews

RESEARCH METHODOLOGY: QUANTITATIVE



- The data for this report was collected in the US in July and October 2020
- Data was gathered via Wine Intelligence’s Vinitrac® US online survey
- Respondents were screened to ensure that they were at least 21 years old; drank red, white, rosé or blush wine at least once a month; and bought wine in the off-premise 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 data is representative of US regular wine drinkers in terms of gender, age and US Divisions
- The distribution of the sample is shown in the table:

		<i>Jul + Oct-20</i>
		<i>n= 10,000</i>
Gender	Male	51%
	Female	49%
	Total	100%
Age	21-24	8%
	25-34	21%
	35-44	20%
	45-54	14%
	55-64	15%
	65 and over	22%
	Total	100%
US Divisions	New England	5%
	Middle Atlantic	15%
	East North Central	11%
	West North Central	7%
	South Atlantic	21%
	East South Central	4%
	West South Central	11%
	Mountain	7%
	Pacific	19%
		Total

Source: Wine Intelligence, Vinitrac® US, July and October '20, (n=10,000) US regular wine drinkers

Other sources in the report include Wine Intelligence market experience, secondary sources and consumer interviews.

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Wine Intelligence London (Head Office)

109 Maltings Place
169 Tower Bridge Road
London
SE1 3LJ

Telephone: +44 (0)20 8194 0090

Email: info@wineintelligence.com

Website: www.wineintelligence.com

Follow us:

