



WINE INTELLIGENCE

PORTUGAL WINE LANDSCAPES

MARCH 2021

REPORT BROCHURE

PRICING



Option 1: Report + data table

Option 2: Report only (no data table)



Options to pay online or via invoice

[Learn more about Report Credit Bundles, which can be used to buy multiple reports and save 30% on the price of buying reports individually.](#)

First time buyer, small business and academic discounts available.
Please contact reports-shop@wineintelligence.com to enquire.

CONTENTS



05 **Introduction**
Management summary

15 **Overview of Portuguese wine consumers**
Sizing
Demographics
Wine consumption frequency
Attitudes towards wine and involvement
Views on wine closures
Wine confidence and knowledge index

26 **Repertoire**
Alcoholic beverage repertoire
Varietal consumption
Origin awareness and purchase

38 **Wine-buying behaviours**
Wine-buying channel usage
Wine-buying retailer usage
Wine-buying choice cues

47 **Wine consumption behaviours**
Off-trade: wine consumption frequency by occasion
Wine gift-giving
Off-trade: spend on wine by occasion
Wine purchase in the on-trade
On-trade: wine consumption frequency by occasion
On-trade: spend on wine by occasion

59 **Brand health**
Brand awareness
Brand purchase
Brand conversion
Brand consideration
Brand affinity
Brand recommendation

67 **Research methodology**
Quantitative
Qualitative

INTRODUCTION



2020, a year of pandemic and lockdown, brought enormous challenges to the Portuguese wine industry as it went through a difficult period of adaptation. Had it been a normal year, the contents of this report would have been different – but maybe not as much as you would expect.

While tourists vanished and the on-trade closed twice, immensely affecting the overall volume of wine being sold, there are some silver linings when we focus on how Portuguese consumers reacted.

In last year's report (Portugal Wine Landscapes 2020), **premiumisation** was one of the key highlights. Portuguese regular wine drinkers were drinking more expensive wines. That was not interrupted by the pandemic, it was rather fuelled, with consumers now stating higher spending across most occasions analysed in this study, both at-home and out in restaurants and bars

Last year's report also highlighted how the global **moderation** trend was evolving fast in Portugal. Consumers wanted to moderate their consumption and were focused on their health and wellbeing. And while in 2021 we have fewer monthly wine drinkers, the proportion of weekly wine drinkers has increased and consumers are saying they are drinking more wine than other types of beverages.

Lockdowns provided more moments for wine-drinking, which we have seen across the globe. Wine has been seen as a little luxury to treat oneself to. And Portuguese regular wine consumers are no exception, drinking more wine now than in the previous year, be it wine that was stored or wine that was bought, and now from a broader range of channels.

Convenience channels were naturally preferred as consumers want to spend less time in-store. The online sales channels became particularly relevant, accelerating significantly from a small base. But it was in the online communication channels that the real revolution happened with marketing teams across the country shifting their communication and targeting strategies in a fantastic way.

Finally, there are some Covid-19 winners we would like to highlight:

- Wines from Trás-os-montes
- Wines from Algarve
- The grape varietal Sauvignon Blanc
- The retailer Continente
- The retailer Mercadona

This report will explain why.

CONSUMERS ARE SPENDING MORE ON WINE

The premiumization trend was not interrupted by the Covid-19 pandemic as consumers state higher average spend across most occasions

While consumers are stating higher spending across most occasions in both the on-trade and off-trade, significantly less regular wine drinkers see “wine as an expensive drink”

“I agree that, generally speaking, wine is an expensive drink”

2019 2020
34% 29% ↓



Spend by occasion: **Tracking**

Average stated spend per bottle
Base = Those who drink wine on each occasion

- Off-trade
- On-trade

	2017	2020	Tracking
At a more formal dinner in a restaurant	€ 10,44	€ 10,88	→
As a gift for somebody	€ 9,99	€ 10,61	↑
At a party / celebration / big night out	€ 9,53	€ 10,26	↑
A relaxing drink out at the end of the day	€ 7,85	€ 8,33	↑
At a lunch break in a restaurant	€ 7,66	€ 7,97	→
With a more formal dinner party at home	€ 6,12	€ 6,61	↑
At a party / celebration at home	€ 6,14	€ 6,57	↑
A relaxing drink at the end of the day at home	€ 4,18	€ 4,46	→
With an informal meal at home	€ 3,76	€ 4,17	↑

Methodology note: values were stated by consumers, therefore they refer to how consumers believe they behaved and may not be a precise reflection of the market. Consumer stated frequency and spend should be analysed relatively rather than in absolute

WHAT DO MARKET EXPERTS SAY?

“Consumers now buy better wines in supermarkets and shops, to compensate going less to restaurants”

Distributor

“In times of crisis, wine is seen as a little luxury, especially when consumers have to stay at home”

Large producer

“We see consumers restocking the premium wines they like to save for special occasions”

Distributor

↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Sources:

- Wine Intelligence, Vinitrac® Portugal, Oct’17, Oct’19 and Oct’20 (n ≥ 1,000) Portuguese regular wine drinkers
- Wine Intelligence trade interview programme 2020-21 (n = 8)

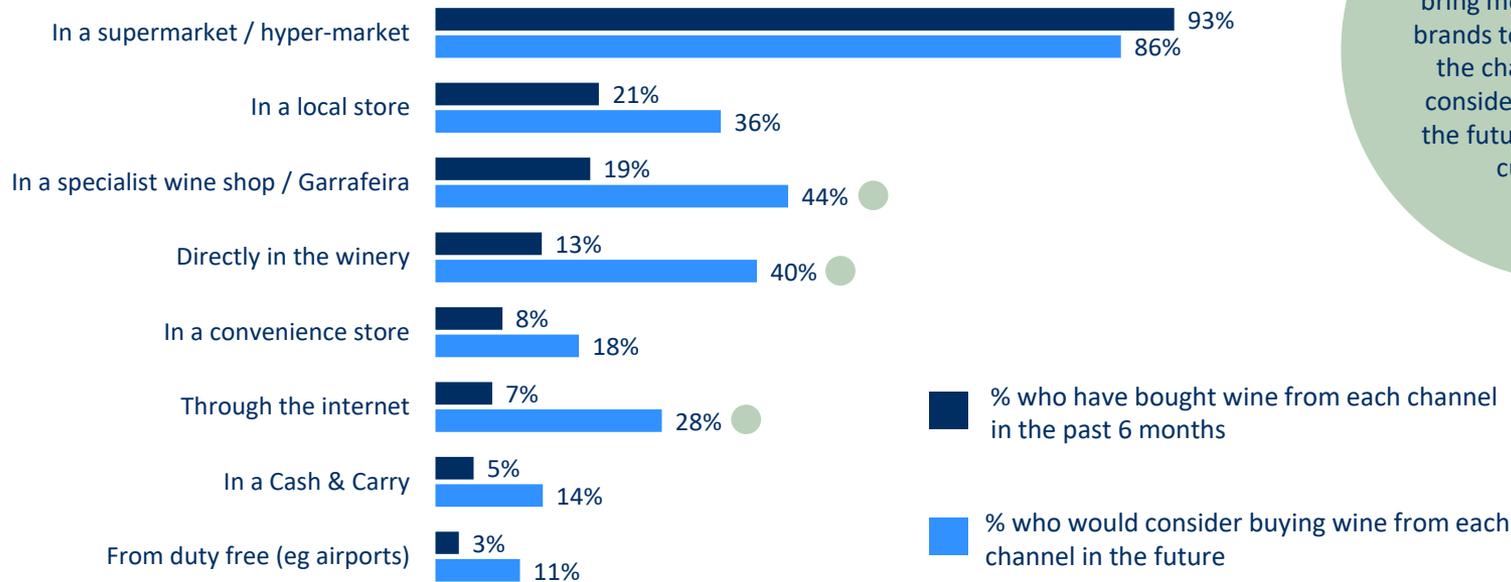
EXAMPLE SLIDE: WINE-BUYING CHANNEL USAGE AND CONSIDERATION



The supermarket / hyper-market channel dominates the current wine buying scene in Portugal, but consumers are considering buying wine for a broad range of other options

Wine-buying channel usage and consideration

Base = All Portuguese regular wine drinkers (n=1,000)



Garrafeiras, wineries and online are channels that bring more opportunity for brands to engage. These are the channels consumers consider using the most in the future, relative to their current usage

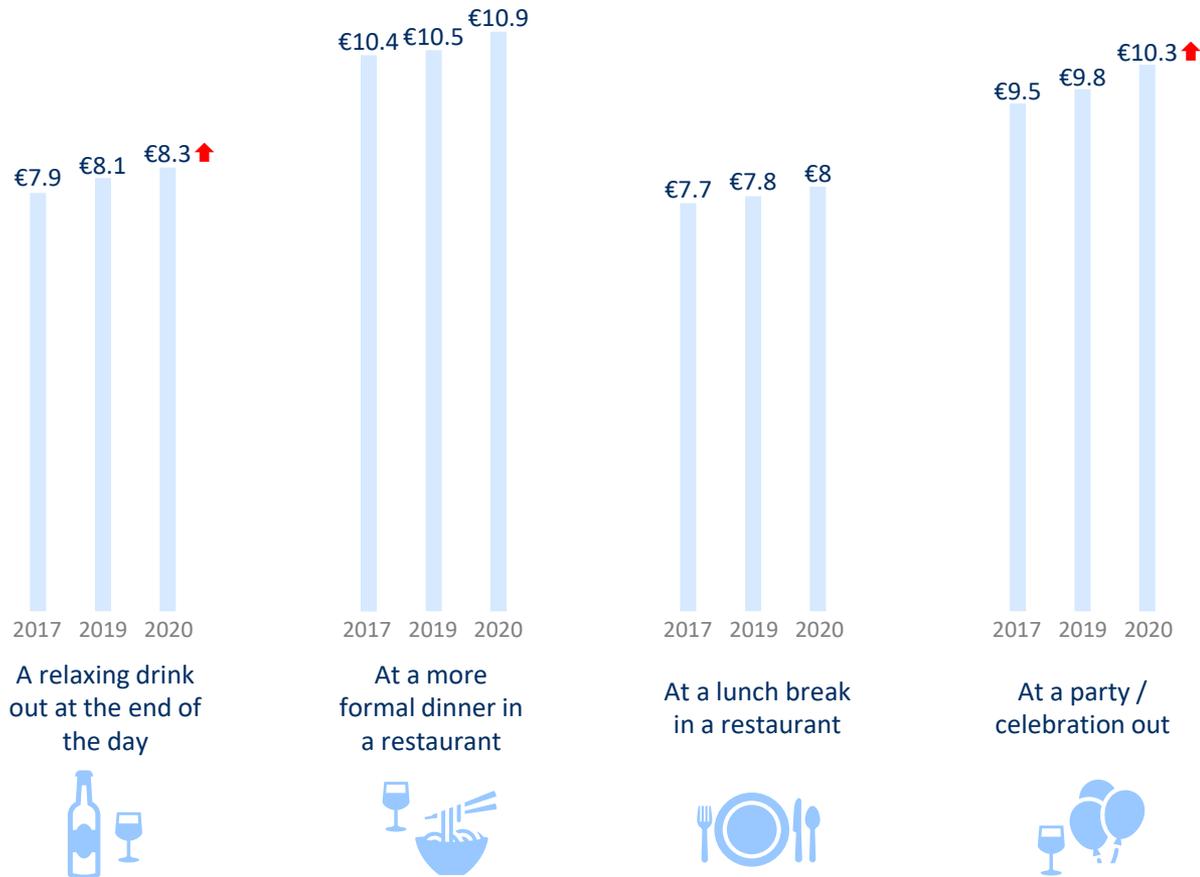
EXAMPLE SLIDE: ON-TRADE: SPEND ON WINE BY OCCASION



Amongst those who drank wine in restaurants during the summer season when restaurants were open, the average spend per bottled increased significantly, particularly for both casual and celebration occasions

On-trade spend by occasion: Tracking

Average stated spend per bottle
Base = Those who drink wine on each occasion



Methodology note: values were stated by consumers, therefore they refer to how consumers believe they behaved and may not be a precise reflection of the market. Consumer stated frequency and spend should be analysed relatively rather than in absolute

Note: the data collection for this study happened in October, post-summer, when restaurants were open

RESEARCH METHODOLOGY: QUANTITATIVE



The data for this report was collected in Portugal in November 2017, November 2018 and October 2019

Data was gathered via Wine Intelligence's Vinitrac® online survey

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 shown in the table

		Oct-17	Oct-19	Oct-20
	<i>n=</i>	1,000	1,405	1,000
Gender	Male	55%	56%	56%
	Female	45%	44%	44%
	Total	100%	100%	100%
Age	18-24	2%	2%	2%
	25-34	11%	13%	13%
	35-44	18%	19%	19%
	45-54	19%	20%	20%
	55-64	21%	19%	19%
	65 and over	29%	27%	27%
	Total	100%	100%	100%

Source: Wine Intelligence, Vinitrac® Portugal, October 2017 (n = 1,000), October 2019 (n = 1,405) and October 2020(n = 1,000), Portuguese regular wine drinkers

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

Ready to purchase?

- [Buy online](#)
- Request an invoice by emailing reports-shop@wineintelligence.com

Need to know more?

- Email reports-shop@wineintelligence.com with your question(s)



*Connecting wine businesses with
knowledge and insights globally*

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:

