



Portraits



Wine Intelligence

UK 2018

REPORT PRICE • GBP 2,500 • AUD 4,500 • USD 3,500 • EUR 3,000 • 5 Report Credits

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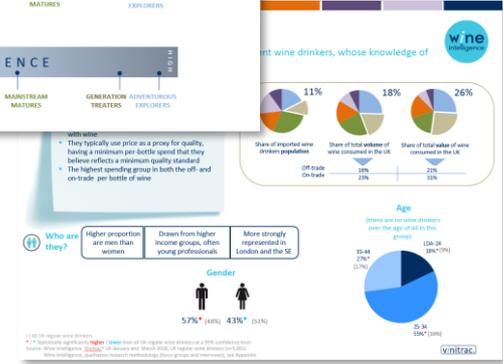
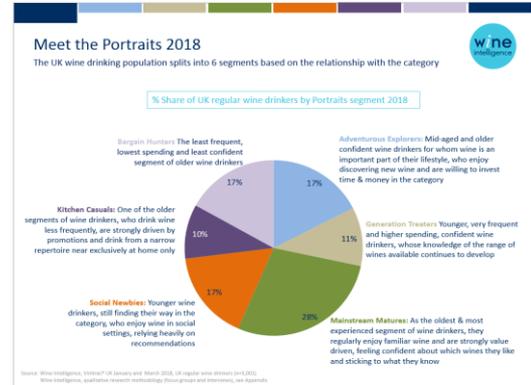


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Price also includes
 profiling data in
 Excel
 (All Vinitrac® questions with
 cross-tabulations by the
 segments)

101-page
 PowerPoint
 report



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How Portraits works

What is Portraits?

- Portraits is a series of reports started by Wine Intelligence 13 years ago to provide wine businesses with a reference segmentation model of wine drinker usage and attitudes which can be applied to individual brands, regions, countries of origin, style categories and retailers.
- Portraits are detailed in a full PDF report and supporting Excel data table
- UK Portraits 2018 is the sixth edition of UK Portraits. Portraits reports are also available for Australia, Canada, China and USA

How we make Portraits...

- To develop the base model, Wine Intelligence uses an algorithm based on factor and cluster analysis to group consumers into distinct segments, using their answers to questions about their wine-drinking behaviour 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 above include demographic information and more detailed questions on wine-drinking behaviour
- The final Portraits segments shown in this report are based on an integrated research methodology utilising both quantitative and qualitative data inputs
 - **Quantitative:** Analysis for UK Portraits is based on a sample of 5,001 UK regular wine drinkers collected in January and March 2018 via Wine Intelligence's Vinitrac® online survey. Comparisons for some measures were made against the previous UK Portraits 2016.
 - **Qualitative:** A combination of focus groups and consumers interviews were conducted in London in June and July 2018 (see Appendix for details of the qualitative research methodology)

How can I use Portraits?

Objectives

The Portraits report series has two main objectives:

1. Help to **identify consumer segments and understand your target consumers** for current or future products
2. Provide a detailed profile of those consumers, including:
 - **Who** they are
 - **Why** they drink wine
 - **What** they drink
 - **Where and how** they buy wine

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 much broader product 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 value-oriented, 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



Portraits-based wine business strategies

Over the years our clients have used the Portraits report series in a variety of ways to target their high-potential consumers. Here are a few examples of how this consumer segmentation can be used to develop more tailored wine business strategies.

Portfolio strategy

The first step when selling a product to the UK market is deciding who the target consumers are. Wine companies have used UK Portraits to assess where their market opportunity lies by determining to whom their products might appeal, and to design an overall portfolio strategy that is targeted to these consumers.

Brand health assessment among target Portrait groups

Vinitrac® - our global online wine drinker survey – allows Wine Intelligence to assess brand health among both overall UK regular wine drinkers and within specific Portraits segments, including looking at trends over time. This can be used to understand with which consumers a brand is strongest and weakest, and to assess competitive positioning among target consumers.

When looking to explore how consumers react to a product's branding in more depth and what conscious and unconscious associations they have with the product, we often conduct focus groups with consumers from targeted Portrait segments, which allows us to build a deeper understanding not only of how the brand is viewed in general, but also how it fits into the wine drinking habits of the specific consumers for whom it is intended.

New product testing

Newly developed products can be tested with target consumers in a variety of ways. In addition to focus groups, wine companies often ask us to test their product with a larger sample of consumers through hall tests, where we recruit consumers from the target Portrait group to taste the product and provide their feedback on the taste and style.

Label and packaging testing

To assess how a label or packaging design is positioned relative to its competitors, or how a new label design is perceived by consumers, we often use a combination of focus groups with target consumers to explore their reactions to the packaging combined with label testing with a representative sample of UK regular wine drinkers through our Vinitrac® survey platform. This allows us to see both how the packaging performs overall, and, importantly, how it performs among its core Portrait group.

Meet the Portraits 2018

The UK wine drinking population splits into 6 segments based on the relationship with the category

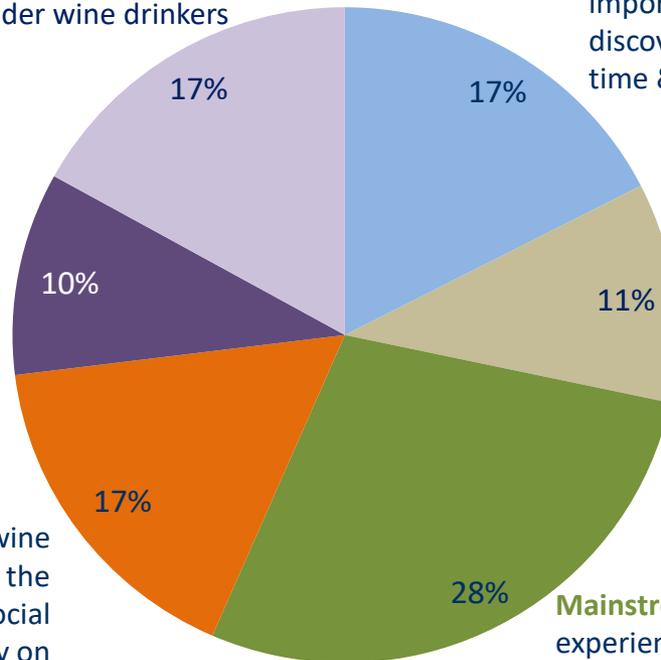
% Share of UK regular wine drinkers by Portraits segment 2018

Bargain Hunters The least frequent, lowest spending and least confident segment of older wine drinkers

Adventurous Explorers: Mid-aged and older confident wine drinkers for whom wine is an important part of their lifestyle, who enjoy discovering new wine and are willing to invest time & money in the category

Kitchen Casuals: One of the older segments of wine drinkers, who drink wine less frequently, are strongly driven by promotions and drink from a narrow repertoire near exclusively at home only

Generation Treaters Younger, very frequent and higher spending, confident wine drinkers, whose knowledge of the range of wines available continues to develop



Social Newbies: Younger wine drinkers, still finding their way in the category, who enjoy wine in social settings, relying heavily on recommendations

Mainstream Matures: As the oldest & most experienced segment of wine drinkers, they regularly enjoy familiar wine and are strongly value driven, feeling confident about which wines they like and sticking to what they know

Quantitative Methodology

- The data for this study was collected in January and March 2018
- 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 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 UK regular wine drinkers in terms of age, gender, region and income
- The distribution of the sample is shown in the table on the right

UK Portraits 2018		
		Sample size = 5,001
Gender	Male	48%
	Female	52%
	Total	100%
Age	LDA-24	9%
	25-34	16%
	35-44	17%
	45-54	17%
	55-64	15%
	65 and over	27%
	Total	100%
Region	North East, North West & Yorkshire and the Humber	21%
	East Midlands, West Midlands & East Anglia	24%
	London & South East	29%
	South West	9%
	Wales	5%
	Scotland	9%
	Northern Ireland	3%
Total	100%	
Total household income before taxes	Under £15,000	7%
	£15,000 - £19,999	5%
	£20,000 - £29,999	17%
	£30,000 - £34,999	9%
	£35,000 - £39,999	9%
	£40,000 - £44,999	6%
	£45,000 - £49,999	5%
	£50,000 - £59,999	7%
	£60,000 - £69,999	7%
	£70,000 - £99,999	10%
	£100,000 - £199,999	5%
	Over £200,000	1%
	Prefer not to answer	11%
	Total	100%

Source: Wine Intelligence, Vinitrac® UK, January and March 2018 UK regular wine drinkers (n=5,001)

Qualitative Methodology: Interviews & focus groups



Interview methodology

- 10 x **Adventurous Explorers** were interviewed individually or during a paired in-depth consumer interviews in July 2018 in London and the South East
- Each individual or paired in-depth consumer interview lasted 1 hour 30mins, covering general wine drinking and buying behaviour and preferences, motivations and attitudes towards wine and purchase choice cues



Focus group methodology

- Three focus groups with **Generation Treaters**, **Social Newbies** and **Mainstream Matures** were conducted in June and July 2018 in London
- Each focus group discussion lasted 1 hour 30mins, covering general wine drinking and buying behaviour and preferences, motivations and attitudes towards wine and purchase choice cues

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Format: 101- page PowerPoint (PDF) + supporting data table (Excel)

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