



WINE INTELLIGENCE

UK PORTRAITS 2021

JULY 2021

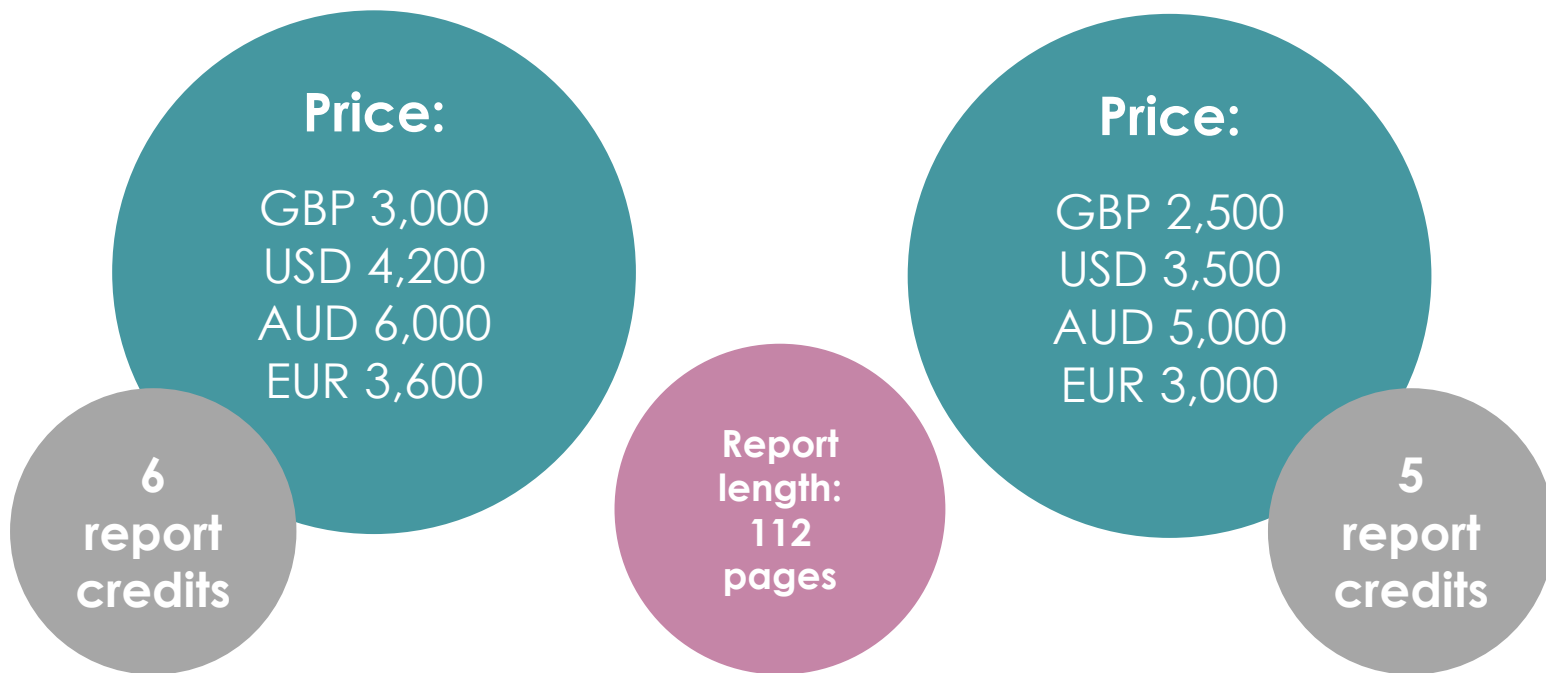
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How Portraits works

What is Portraits?

- Portraits is the name given to a series of wine attitudes and behaviour segmentations by Wine Intelligence, providing wine businesses with a reference segmentation of wine drinkers in key global markets that can be applied to individual brands, regions, countries of origin, style categories and retailers
- UK Portraits 2021 is the 7th edition of our UK market segmentation. Portraits are also available for the US, China, Australia, Canada and, later on this year, Portugal

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 behaviours and their attitudes 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 behaviour
- The individual segment descriptions are developed using an integrated research methodology utilising both quantitative and qualitative inputs
 - **Quantitative:** Analysis for UK Portraits is based on a sample of 5,004 UK regular wine drinkers collected in July 2020, January and March 2021 via Wine Intelligence's Vinitrac® online survey. Comparisons for some measures were made against the previous UK Portraits 2018 report
 - **Qualitative:** Interviews were conducted across the UK in June 2021 (see Appendix for details of the qualitative research methodology)

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INTRODUCTION



The new UK Portraits market segmentation model represents a microcosm of the UK market in 2021 – clearly marked by the recent Covid pandemic, but also reflecting longer-term trends in the UK wine consumer population that have been developing over the past decade.

No marketing strategy can avoid the fundamental behavioural changes that have occurred in the UK (and other markets) as a result of Covid. How long these effects last remains to be seen, but at time of writing in July 2021, the likelihood is that UK consumer behaviour will remain altered for some time to come. The best example of this is in the on-trade, where certain groups of consumers, particularly older ones, have voted with their feet and stayed away from bars and restaurants, even when those venues were open for business in the past year.

On the other hand, it is equally important to look beyond the short-run changes and disruptions to behavioural patterns, and towards some fundamental long-run societal changes that are affecting the wine market. The UK population as a whole is getting older, and the wine drinking population is ageing too. However, the danger signal for the wine category is that the wine drinker profile is ageing faster, with nearly half of all UK monthly wine drinkers aged 55 or older.

There is also a growing gulf in income among those participating in the wine category, in part reflecting long-run changes in society, but also a consequence of Covid. The impact of higher levels of disposable income on behaviour is particularly apparent amongst younger consumers. More affluent younger adults, if finances allow, are seeking to learn and develop their wine knowledge through trading up to more interesting and exclusive products. Less well-off youngsters are, not surprisingly, much more price- and budget-conscious.

The influence of both long- and short-term factors are apparent, to different degrees, in our 2021 Portraits segments.

Our leading knowledge and involvement segment, Adventurous Explorers, appear to have been most acutely affected by the pandemic. The group now accounts for 1 in 5 drinkers, but is slightly older and lower-spending compared with previous years. They appear to have reduced their consumption frequency overall, but especially in on-trade, where restrictions and safety concerns have eroded both opportunities and motivations respectively amongst this group. They have also become a bit more budget-oriented, perhaps because they have been more restricted in their purchasing in off-trade – for instance, not being able to spend time in a wine shop.

By contrast, the Generation Treater segment has become a higher spending group, both in off-trade and on-trade, as their tastes and confidence have expanded along with their ability to spend considerable money on their wine purchases. The Covid effect here has been more salient in the off-trade spend profile, with several of our interviewees from the segment confessing to treating themselves to wine to drink at home as a substitute for going out to eat or going on holiday.

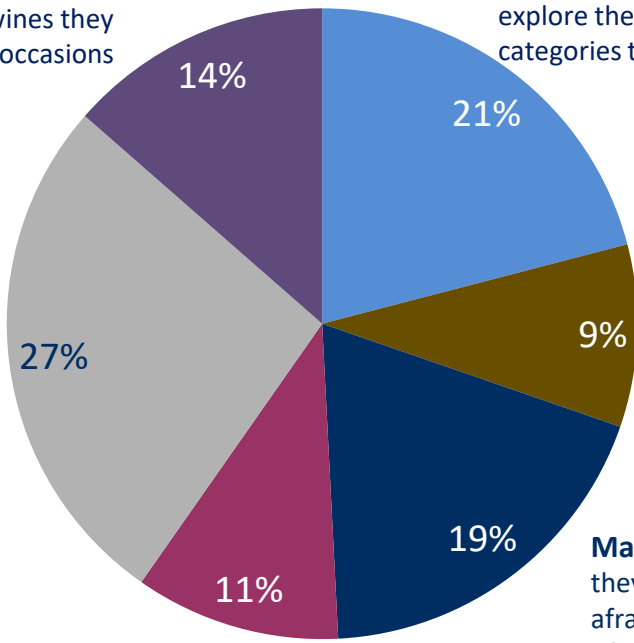
The other segment most influenced by short- and long-term factors is Social Newbies, the youngest and least experienced Portrait in wine terms. This group has shrunk compared with our 2018 model, as younger consumers have drifted away from wine. Perhaps because of this, those who remain are more frequent drinkers than their 2018 predecessors. As a group whose employment prospects have been most acutely affected by Covid, it is not surprising to see that they are even more budget conscious than in previous years.

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

Kitchen Casuais: The oldest segment, they are infrequent and low-spending wine drinkers, with very few consuming wine in the on-trade. They show limited interest in the wine category, sticking to the narrow range of wines they know, and typically only buy wine for specific occasions

Senior Bargain Hunters: One of the oldest segments, they are infrequent wine drinkers. Time in the category means they have reasonable wine knowledge, but purchase from a narrow repertoire of styles and brands, and are strongly value-driven

Social Newbies: The youngest segment, this group is now drinking wine typically several times a week. They mostly drink wine in social occasions, with wine not fully integrated into their lifestyle, and tend to be quite budget-conscious (partly driven by their high consumption frequency). They have limited wine knowledge and rely heavily on recommendations when buying wine. They are usually happy to drink what is poured for them



Adventurous Explorers: Mid-aged and older confident wine drinkers for whom wine is an important part of their lifestyle, who enjoy discovering new wine. A larger segment than in previous years, they are savvy drinkers who seek out good value ways to explore the category, and feel able to experiment within sub-categories thanks to their higher knowledge and confidence levels

Generation Treaters: One of the younger segments (mainly Millennials), they are frequent drinkers and the highest spenders. They are typically less experienced in the wine category and have lower levels of knowledge, but exude confidence and are keen to explore the category more. They are open to trying a wide variety of wine types and enjoy the process of learning more about wine, and are most inclined to trade up to something exciting when the opportunity arises

Mature Treaters: Mid- and older-aged drinkers, they drink wine relatively infrequently but aren't afraid to spend when they do. They have high levels of knowledge and return to wines they know and like, and are happy drinking wine both at home and in on-trade settings

Habitual drinkers who enjoy wine to relax and as an accompaniment to social occasions



Why do they drink wine?

- Regular and habitual wine drinkers, focused around both weekday and weekend evenings. It is drunk both as a social drink when entertaining friends or dining out, but also in low-key occasions like winding down after work
- There is a strong connection with food, with wine as an accompaniment to cooking and dining at home – thought goes into which wine pairs best with the dish
- They enjoy the process of discovering wine. Part of the enjoyment comes with discovering new things and being savvy drinkers – finding good quality wines at a reasonable price

“That's where we'll start, eating, always wine. Always wine, unless it's something like a curry. I'm just programmed to have beer with it, just from an early age. But apart from that, it will be wine with a meal, and normally it will be red.”
Adventurous Explorer, Male

“I finish gardening on a hot sunny day, I will sit on the swing and then that will be my relaxing time. For me, it's relaxing and winding down. I don't need it for confidence or to be social, I don't drink for those reasons. It adds to the enjoyment of an occasion I am already enjoying.”
Adventurous Explorer, Female

“Cooking food or eating food. And I tend to, from a health point of view, stop drinking after I finish food because I might have the rest of a glass or top up my glass as I'm finishing my food and that's it. Then I'll cork the bottle.”
Adventurous Explorer, Male

“Friday night after work, it's always nice to at dinner to have wine with meal. So I would say at the weekend, I'll always have wine with dinner... also when people gather, whether they come to me or we all go out to a restaurant. Then that's when I would have some wine.”
Adventurous Explorer, Female

“if I have my children come over or we've got friends over, then I will start with the Prosecco and then probably move into a white wine. But if I've not got any one over at the weekend, then I wouldn't really open the bottle of Prosecco, just the wine.”
Adventurous Explorer, Female

EXAMPLE SLIDE:

ADVENTUROUS EXPLORERS: WINE ORIGIN



Drink from a broad range of countries and regions



What do they drink?

- Country of origin is important – **82%** consider it important when buying wine, compared to 66% of all regular wine drinkers
- French and Italian wines** are particularly popular, as are **Australian, Spanish and Chilean**. They are much more likely to have drunk wines from Rioja
- Country and region preferences are also heavily influenced by personal experiences**, including holidays to regions and personal connections with those places

Compared with others, they are particularly fans of wine from:
France, Italy, Australia, Spain

“My sister lives in New Zealand and I was introduced to New Zealand wines going out to visit her many, many years ago. And I think that's really where it started, where it came from, my joy of drinking New Zealand wine”
Adventurous Explorer, Female

“I tend to drink a few South African ones because my brother-in-law is South African, and we enjoyed a lot of the wines”
Adventurous Explorer, Female

“I say I tend to go for New Zealand or for South African, Australian wines really.”
Adventurous Explorer, Female

Country of origin consumption: Top five

% who have drunk from the following countries of origin in the past 6 months



France
63% (49%)



Italy
60% (46%)



Australia
59% (44%)



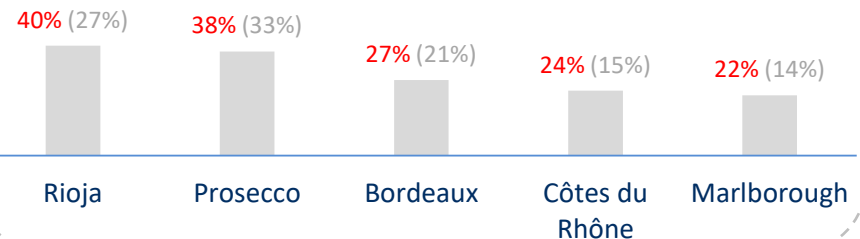
Spain
54% (40%)



Chile
52% (35%)

Region of origin purchase: Top five

% who have drunk from the following regions of origin in the past 3 months



RESEARCH METHODOLOGY: QUANTITATIVE



- The data for this report was collected in the UK in July 2020, January 2021 and March 2021
- Data was gathered via Wine Intelligence's Vinitrac® UK online survey
- Respondents were screened to ensure that they were at least 18 years old; drank red, white or rosé wine at least once a month; and bought 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 UK regular wine drinkers in terms of gender, age, annual pre-tax household income and region
- The distribution of the sample is shown in the table:

		<i>Mar-20, Jan-21+Mar-21</i>
		<i>n= 5,004</i>
Gender	Male	47%
	Female	53%
	Total	100%
Age	18-24	6%
	25-34	14%
	35-44	16%
	45-54	17%
	55-64	16%
	65+	30%
	Total	100%
Annual household income before taxes	Under £20,000	11%
	£20,000 - £29,999	19%
	£30,000 - £39,999	17%
	£40,000 - £59,999	17%
	£60,000+	23%
	Don't know / Refused	13%
Total	100%	
Region	North	22%
	Midlands	15%
	South East + East	21%
	London	13%
	South West	12%
	Wales	5%
	Scotland	8%
	Northern Ireland	3%
	Total	100%

Source: Wine Intelligence, Vinitrac® UK, July 2020 + January and March 2021, (n=5,004) UK regular wine drinkers

CONSUMER INTERVIEWEES

Consumer Interviews were conducted with consumers located across the United Kingdom in June 2021

The interviews lasted between 30 and 45 minutes and were done via phone or Zoom, covering general wine drinking and buying behaviours and preferences, motivations and attitudes towards wine and purchase choice cues

Sample size n = 19

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



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