

WINE INTELLIGENCE

BRAZIL PORTRAITS 2021

SEPTEMBER 2021

REPORT BROCHURE

PRICING



Option 1: Report + data table

Option 2: Report only (no data table)

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AUD 6,000
EUR 3,600

Price:

GBP 2,500
USD 3,500
AUD 5,000
EUR 3,000

Report
length:
75
pages

First time buyer, small business and academic discounts available.
Please contact enquiries@wineintelligence.com to find out more.

How Portraits works

What are Portraits?

- Portraits are a series of reports designed by Wine Intelligence to provide wine businesses with a reference segmentation model of wine drinkers 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
- Brazil Portraits 2021 is the first published edition of our Brazil Portraits. Portraits is also available for the UK, the US, Australia, Canada and China

How we make 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 above, include demographic information and more detailed questions on wine-drinking behavior
- Portraits are based on an integrated research methodology utilising both quantitative and qualitative techniques
 - **Quantitative:** Analysis for Brazil Portraits is based on a sample of 2,993 Brazilian regular wine drinkers collected from October 2019 to October 2020 via Wine Intelligence's Vinitrac® online survey.
 - **Qualitative:** Consumer interviews were conducted across Brazil in November 2020 (see Appendix for details of the qualitative research methodology)

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How can I use Portraits?

Objectives

The Portraits report series has two main objectives:

1. Help to **identify your target consumers**
2. Provide a detailed understanding of those consumers, including:
 - **Who** they are
 - **Why** they drink wine
 - **What** they drink
 - **Where and how** they buy wine
 - **How** you can target them

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 broad 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 lower cost, 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

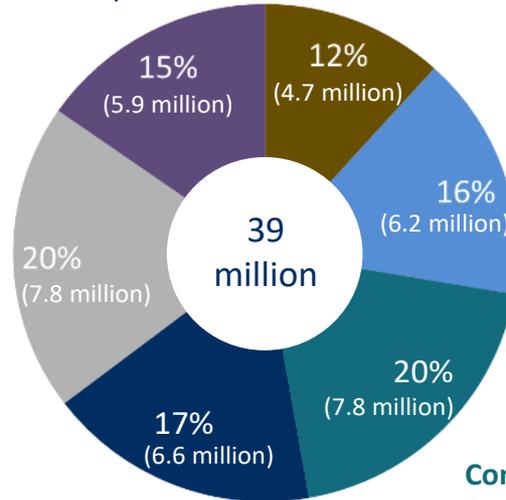
EXAMPLE SLIDE: BRAZIL PORTRAITS: WINE DRINKER SEGMENTATION (2021)



At-Home Occasionals The oldest, least confident and least knowledgeable wine drinkers. With low-to-medium income, they rarely drink wine in the on-trade and stick to the 'traditional' wines they know

Enthusiastic Treaters Youngest and more wealthy consumers with a strong interest in wine. Higher spenders on wine in both the off- and on-trade with a broad wine repertoire who are among the most knowledgeable wine drinkers. Despite being just 12% of wine drinkers in Brazil, they account for 32% of spend on wine in Brazil, driven by high per bottle spend

Bargain Hunters Older, medium income and less frequent wine drinkers. They have the lowest wine involvement and drink wine the least frequently; they are very price and promotion driven



Engaged Explorers Younger wine drinkers for whom wine is an important part of their lifestyle. With a broad wine repertoire, they are the most confident, involved and frequent drinking segment. They enjoy exploring different wines from favoured producers and are willing to invest time and money enriching their wine experiences and knowledge

Mainstream Casuals Frequent wine drinkers with lower to mid income who are interested in wine. Drinking wine relatively frequently at home, they have mid levels of wine knowledge and are confident in making wine choices. These drinkers are price savvy and drink primarily mainstream wine and brands

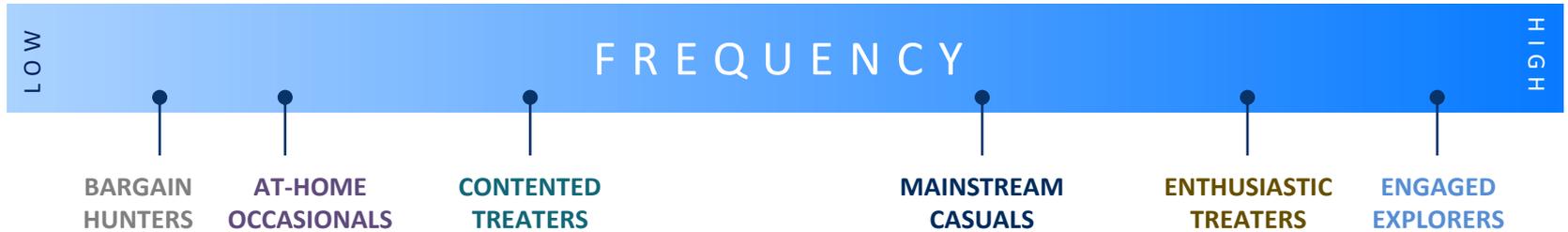
Contented Treaters Drinkers who enjoy wine less frequently, but treat themselves to more premium wines. They are not passionate about wine, but do have a strong knowledge of wine varietals and origins

EXAMPLE SLIDE: INTRODUCING THE PORTRAITS GROUPS: OVERVIEW

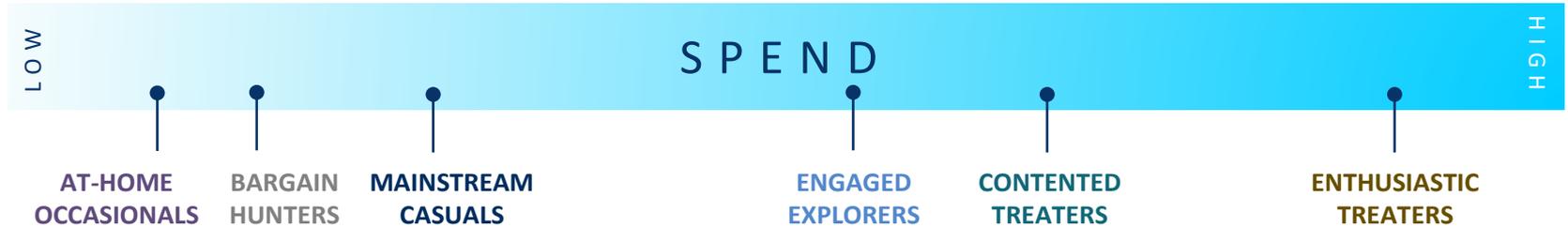


Analysis of wine consumption frequency and typical spend by segmentation

Total wine consumption frequency (off-trade and on-trade)



Typical spend on a bottle of wine (off-trade and on-trade)



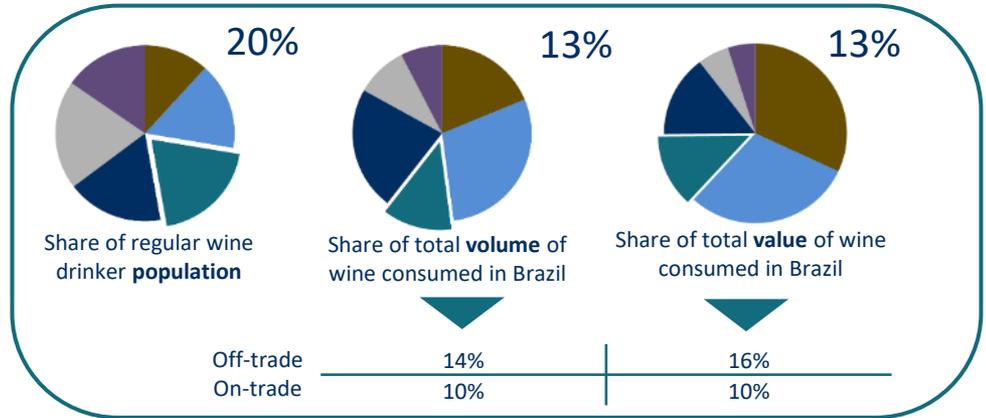
EXAMPLE SLIDE: CONTENTED TREATERS: PROFILE



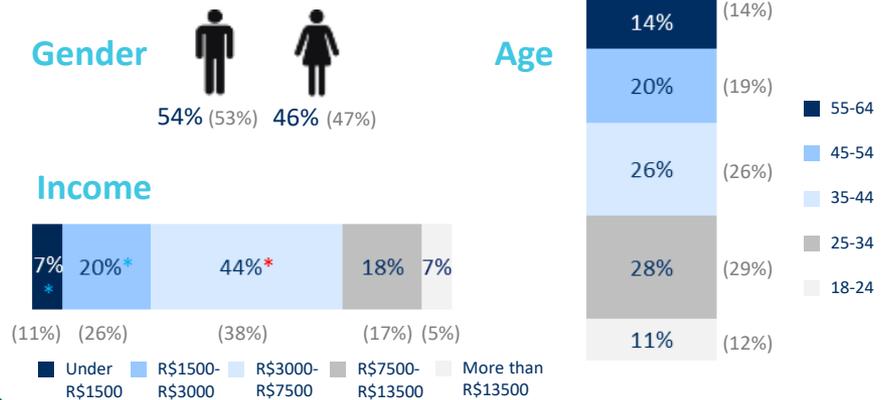
They tend to drink wine only occasionally, but treat themselves when they do

What you need to know

- Similar gender and age split to regular wine drinkers in Brazil
- They are likely to come from a mid-to-high income level
- A significant proportion lives in the Southeast
- As their segment name suggests, Contented Treaters drink wine only once in a while, but when they do drink wine, they tend to be medium-to-high spenders
- Wine is seen as a small luxury that these consumers like to be seen with
- They tend to look at wine more for celebrating something special



Who are they?



() All Brazilian regular wine drinkers

* / * Statistically significantly higher / lower than all Brazilian regular wine drinkers at a 95% confidence level

Sources: Wine Intelligence, Vinitrac® Brazil, October '19, January '20 and October '20, (n=2,993) Brazilian regular wine drinkers

Wine Intelligence, consumers interviews (n=7)

EXAMPLE SLIDE: CONTENTED TREATERS: BEVERAGE AND VARIETAL



Prefer red wine over other alcohols, over-indexing on many mainstream varietals and white wine



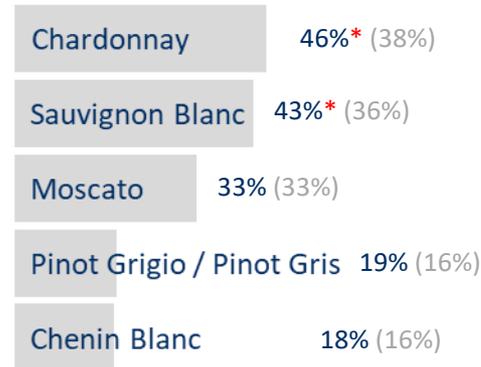
What do they drink?

- Contented Treaters prefer red wine over other alcoholic drinks. They also tend to drink more white wine than the average regular wine drinker in Brazil
- This segment also drinks significantly more craft beer, vodka, cocktails, gin and port
- In line with their preference of red wine, this segment over-indexes on both mainstream and niche red varietals
- With white varietals, they seem to stick with the mainstream options



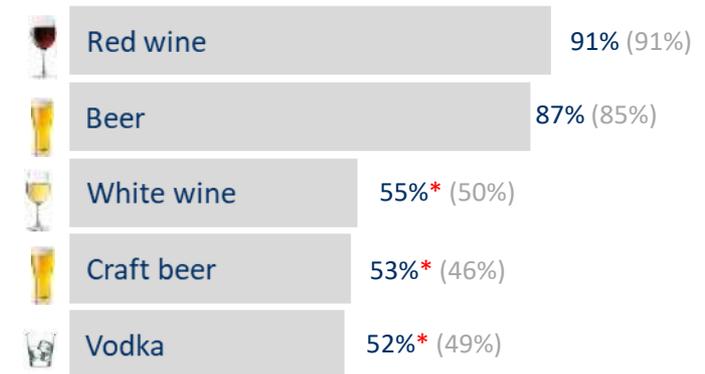
Top 5 white varietals they consume

% who have drunk the following varietals or wine types in the past 6 months



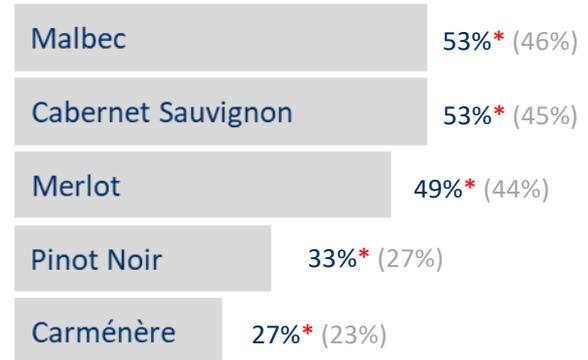
Top 5 alcoholic beverages: Past 12 months

% who have drunk the following beverages in the past 12 months



Top 5 red varietals they consume

% who have drunk the following varietals or wine types in the past 6 months



() All Brazilian regular wine drinkers

* / * Statistically significantly higher / lower than all Brazilian regular wine drinkers at a 95% confidence level

Sources: Wine Intelligence, Vinitrac® Brazil, October '19, January '20 and October '20, (n=2,993) Brazilian regular wine drinkers

Wine Intelligence, consumers interviews (n=7)

RESEARCH METHODOLOGY: QUANTITATIVE



The data for this report was collected in Brazil in October 2019, January 2020 and October 2020 and merged into one dataset for this report

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 Brazilian regular wine drinkers in terms of gender, age and region

The distribution of the sample is shown in the table

Brazil		
		n= 2,993
Gender	Male	53%
	Female	47%
	Total	100%
Age	18-24	12%
	25-34	29%
	35-44	26%
	45-54	19%
	55-64	14%
	Total	100%
Region	North	7%
	Bahia	6%
	North East (outside Bahia)	20%
	Minas Gerais + Espírito Santo	11%
	Rio de Janeiro	10%
	São Paulo	24%
	South	15%
	Midwest	8%
Total	100%	

Wine Intelligence, Vinitrac® Brazil, October 2019 (n = 1,000), January 2020 (n = 993) and October 2020 (n=1,000), Brazilian regular wine drinkers

CONSUMER INTERVIEWEES

In-depth interviews were conducted with 7 consumers in Brazil

Interviews followed a pre-determined discussion guide, and covered overall consumer behaviour, attitude, involvement and knowledge with wine

The 7 interviewees distributed by 4 of the segments:

3 x Enthusiastic Treaters

2 x Engaged Explorers

1 x Contented Treater

1 x Mainstream Casual

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Need to know more?

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



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