



WINE INTELLIGENCE

PORTUGAL PORTRAITS 2021

OCTOBER 2021



PRICING



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How Portraits works

What is Portraits?

- Portraits is the name given to Wine Intelligence's consumer segmentation models, based on wine attitudes and behaviour. These are designed to provide 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
- Portugal Portraits 2021 is the 1st edition of our Portugal market segmentation. Portraits are also available for the US, China, Australia, UK 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 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 key variables used in the statistical cluster analysis are **recalled spend on wine, recalled wine drinking frequency and wine involvement.**
- The individual segment descriptions are developed using both quantitative and qualitative inputs
 - **Quantitative:** Analysis for Portugal Portraits is based on a sample of 4,100 Portuguese regular wine drinkers collected in July and October 2020, and March and June 2021 via Wine Intelligence's Vinitrac® online survey
 - **Qualitative:** Interviews were conducted across Portugal in September 2021 (see Appendix for details of the qualitative research methodology)

Disclaimer: The brands listed in this report arise from the qualitative research conducted with respondents. Their position in the report is no direct reflection of any sales data or quantitative analysis, and are only those mentioned by respondents.

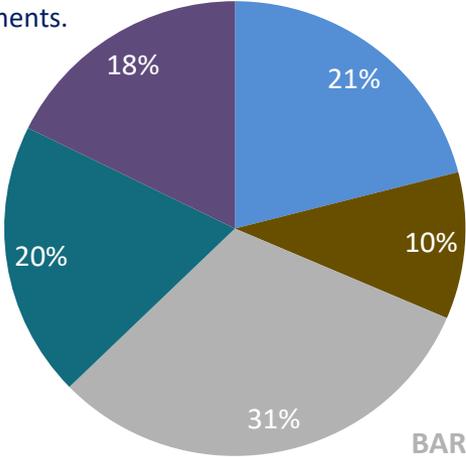
EXAMPLE SLIDE: Portugal Portraits: wine drinker Segmentation (2021)



% share of Portuguese regular wine drinkers by Portraits segments Portugal 2021

KITCHEN CASUALS: The least involved segment, they account for the smallest proportions of volume and value in the Portuguese market and have a largest proportion of female drinkers. They don't drink as often as other groups in general, and rarely do it in the on-trade. Their average spend is also the lowest. This segment is price-driven and has the lowest knowledge and confidence levels of all segments.

ENGAGED EXPLORERS: Middle-aged consumers, with a significant male bias. The most frequent drinkers but only mid-range spenders. Likely due to years spent in the wine category, they are the most involved, knowledgeable and confident segment. They have the broadest repertoire of varietal, origin and brand consumption.



OCCASIONAL TREATERS: One of the least frequent wine-drinking segments though they aren't afraid to spend when they do drink. They know what they like and are inclined to stick to it. Whilst they are relatively conservative on their choices, they are also one of the least knowledgeable and least confident groups.

GENERATION TREATERS: The segment with the highest population of young people, they also hold the largest share of value in the Portuguese market though they comprise the smallest proportion of the total wine-drinking population. They buy from a broad repertoire of alcoholic beverages, wine styles, and origins. They are relatively involved in and knowledgeable about the wine category, with a confidence level to match.

BARGAIN HUNTERS: The largest proportion of the Portuguese population, they are frequent wine drinkers but don't spend very much on their wine purchases, being highly promotion driven. These are your average consumers, behaving most like the average regular wine drinker in Portugal. They are relatively involved with the category, and have high confidence in their average wine knowledge.

Source: Wine Intelligence, Vinitrac® Portugal, July + October 2020 and March + June 2021, (n=4,100) Portuguese regular wine drinkers

RESEARCH METHODOLOGY: QUANTITATIVE



- The data for this report was collected in Portugal in July 2020, October 2020, March 2021 and June 2021
- Data was gathered via Wine Intelligence's Vinitrac® Portugal 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 Portuguese regular wine drinkers in terms of gender, age and region
- The distribution of the sample is shown in the table:

Jul+Oct '20 and Mar+Jun '21		
n= 4,100		
Gender	Male	53%
	Female	47%
	Total	100%
Age	18-24	2%
	25-34	12%
	35-44	18%
	45-54	19%
	55-64	19%
	65 and over	30%
	Total	100%
Region	Açores	1%
	Aveiro	5%
	Beja	1%
	Braga	6%
	Bragança	1%
	Castelo Branco	1%
	Coimbra	4%
	Évora	1%
	Faro	5%
	Guarda	1%
	Leiria	4%
	Lisboa	30%
	Madeira	2%
	Portalegre	1%
	Porto	20%
	Santarém	4%
	Setúbal	9%
Viana do Castelo	2%	
Vila Real	1%	
Viseu	2%	
Total	100%	

Source: Wine Intelligence, Vinitrac® Portugal, July 2020, October 2020, March 2021 and June 2021, (n=4,100) Portuguese regular wine drinkers

CONSUMER INTERVIEWEES

Consumer Interviews were conducted with consumers located across Portugal in September 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 $n = 17$

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