WINE INTELLIGENCE

BRAZIL PORTRAITS 2021

SEPTEMBER 2021

CONTENTS

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)

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

CONTENTS

OVERVIEW OF REGULAR WINE DRINKERS IN THE BRAZILIAN MARKET

Just over a quarter of Brazilian adults are monthly wine drinkers, with a majority of this population being weekly wine drinkers

Adult population (18-64 years): 141 million [1]

59%

Wine drinkers: 83 million [2]

47%

Regular (i.e. at least once a month) wine drinkers: 39 million [2]

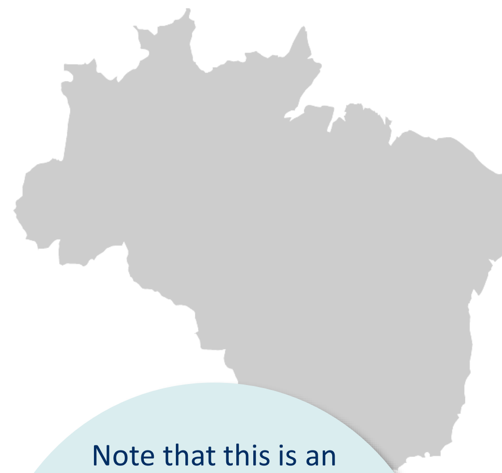
Sample for this report

28%

73%

Weekly wine drinkers: 28 million[3]

20%



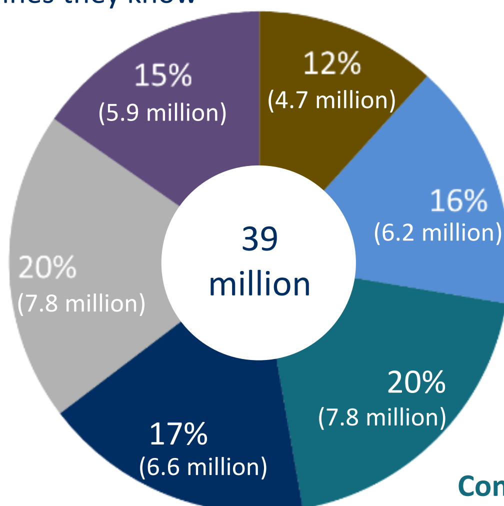
Note that this is an estimate of the entire Brazilian regular (monthly) wine drinking population. Previous Wine Intelligence estimates have only covered major cities

Sources: [1] IBGE, Estimated population
[2] Wine Intelligence online calibration study, October 2019, (n=876) Brazilian adults 18-64 years
[3] Wine Intelligence, Vinitrac® Brazil, October 2019 – October 2020, (n=2,993) Brazilian regular wine drinkers

BRAZIL PORTRAITS: WINE DRINKER SEGMENTATION (2021)

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

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



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

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

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

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

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)

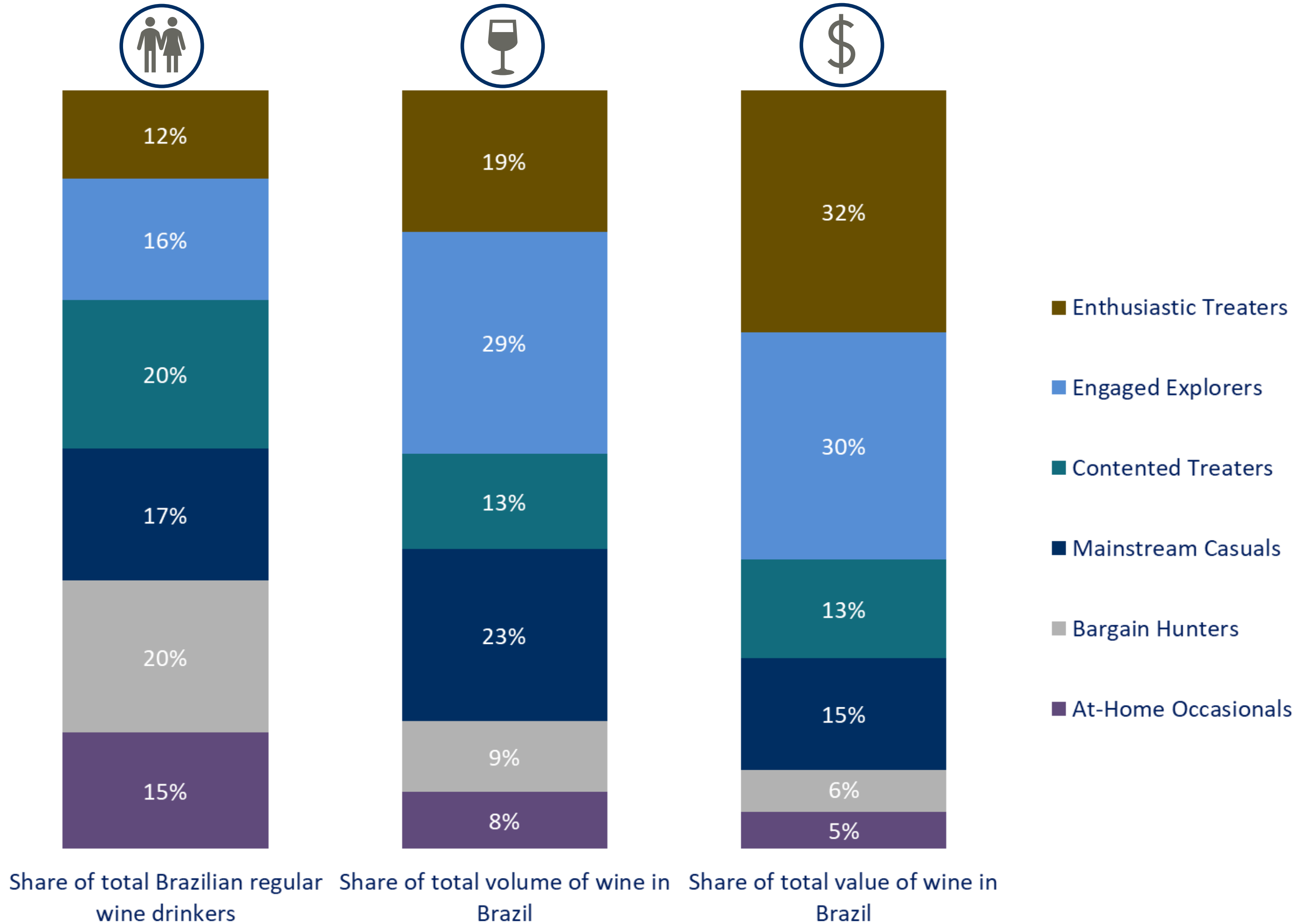
BRAZIL PORTRAITS OVERVIEW: SUMMARY OF SEGMENT ATTRIBUTES

	Enthusiastic Treaters	Engaged Explorers	Contented Treaters	Mainstream Casuals	Bargain Hunters	At-Home Occasionals
Who are they?	Youngest and more wealthy consumers with a strong interest in wine	Younger wine drinkers for whom wine is an important part of their lifestyle	Drinkers who enjoy wine less frequently, but treat themselves to more premium wines	Frequent wine drinkers with lower to mid income who are interested in wine	Older, medium income and less frequent wine drinkers	The oldest, least confident and least knowledgeable wine drinkers
Why do they drink wine?	Wine is part of their lifestyle; they drink wine mostly to relax and will invest on premium wines	Wine is an important part of their personal and social life, so they spend time and money in the category	They drink wine infrequently but enjoy it in more social situations with friends and family	Wine is part of their routine and they frequently enjoy wine at home	They drink wine the least frequently and are very price and promotion driven	Do not understand much about wine and will drink mostly at informal occasions at home
Where?	Buy from higher-end places like specialised wine stores, on the internet and wine clubs	Enjoy drinking wine for any occasion in both the on- and off-trade; they buy wine from a variety of channels	Often use channels including supermarkets, specialised wine stores and Deli stores	Purchase from channels they find convenient, mainly supermarkets that offer mainstream wines and good deals	Mainly purchase from the supermarkets that often offer promotions	Purchase almost only from supermarkets. Never drink wine in restaurants
What do they drink?	Have one of the broadest repertoires; enjoy broadening their repertoire with niche styles	With a broad wine repertoire, they enjoy trying different wines from favoured producers	Will typically go for more premium offers of established and mainstream brands	Drink mostly mainstream varietals, origins and brands	Have the narrowest repertoire and will go for wines that are on offer	Tend to stick to 'traditional' wines they know, often red wines

BRAZIL PORTRAITS MARKET SIZING

Population, share of wine volume and share of spend on wine

Proportion represented by each segment with consumption and spend estimated based on recalled usage frequency and spend data
Base = All Brazilian regular wine drinkers (n=2,993)

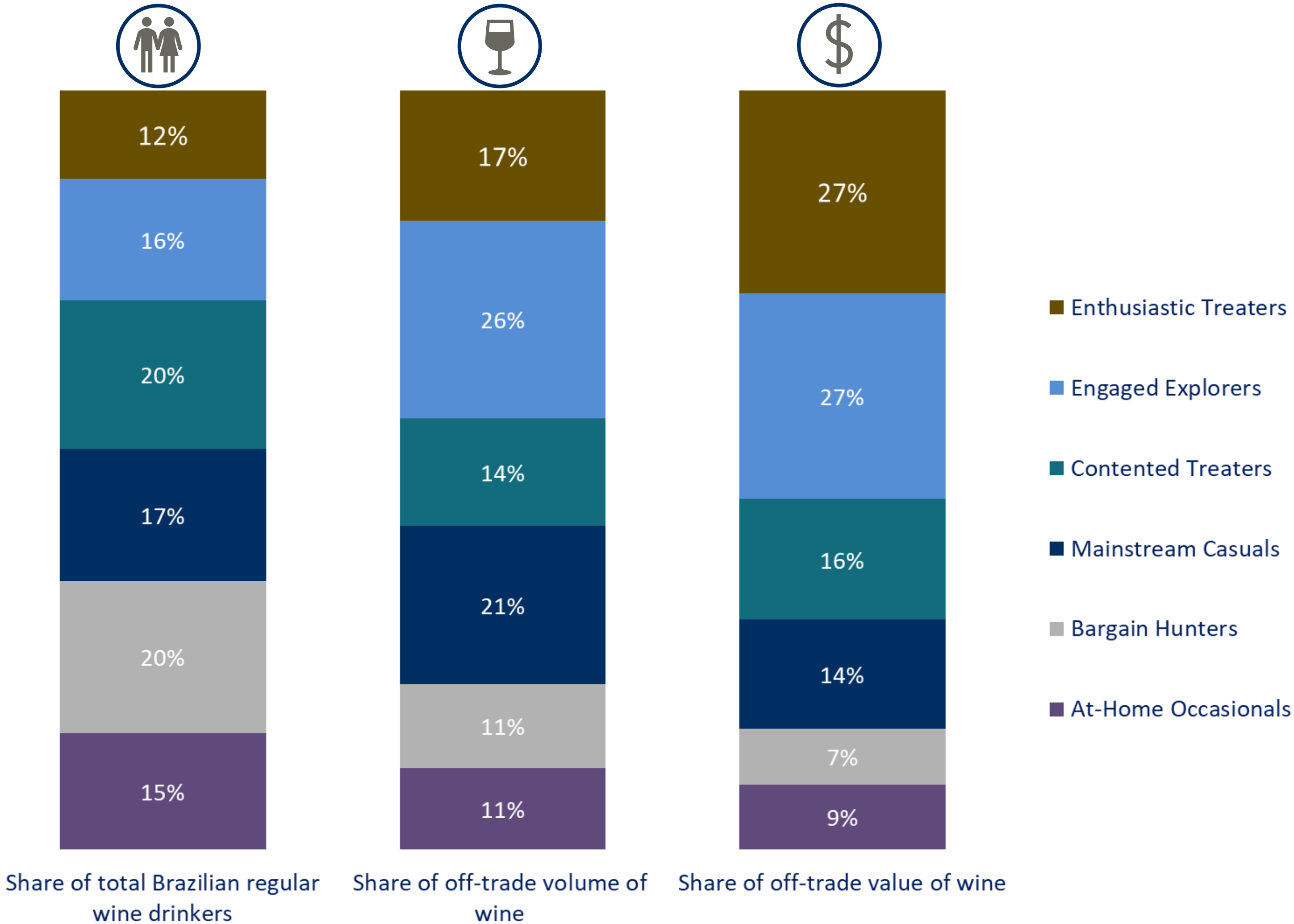


Sources: Wine Intelligence, Vinitrac® Brazil, October '19, January '20 and October '20, (n=2,993) Brazilian regular wine drinkers
Wine Intelligence, consumers interviews (n=7)

BRAZIL PORTRAITS MARKET SIZING: OFF-TRADE

Population, share of wine volume and share of spend on wine in the off-trade

Proportion represented by each segment with consumption and spend estimated based on recalled usage frequency and spend data
Base = All Brazilian regular wine drinkers (n=2,993)



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)

BRAZIL PORTRAITS MARKET SIZING: ON-TRADE

Population, share of wine volume and share of spend on wine in the on-trade

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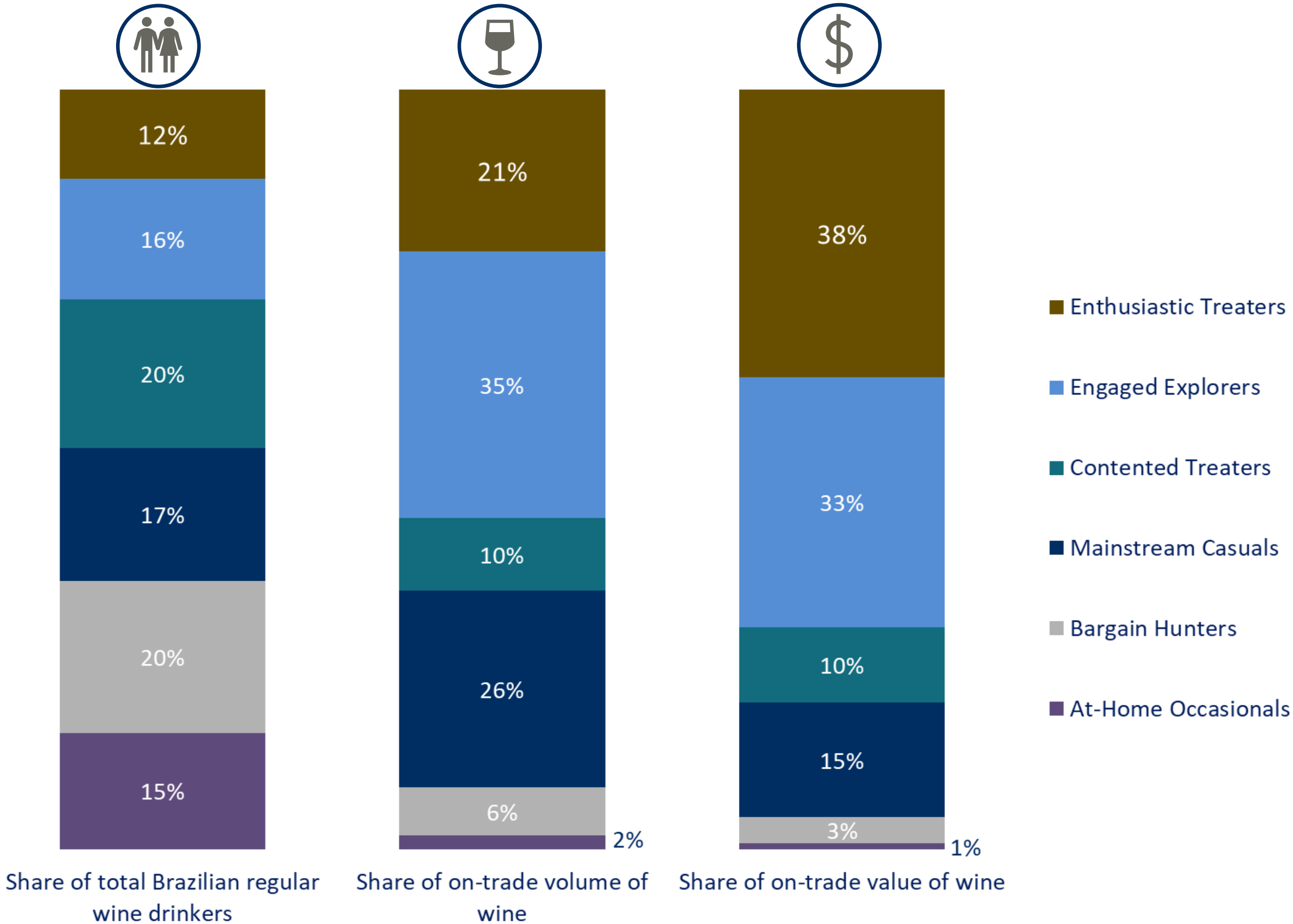
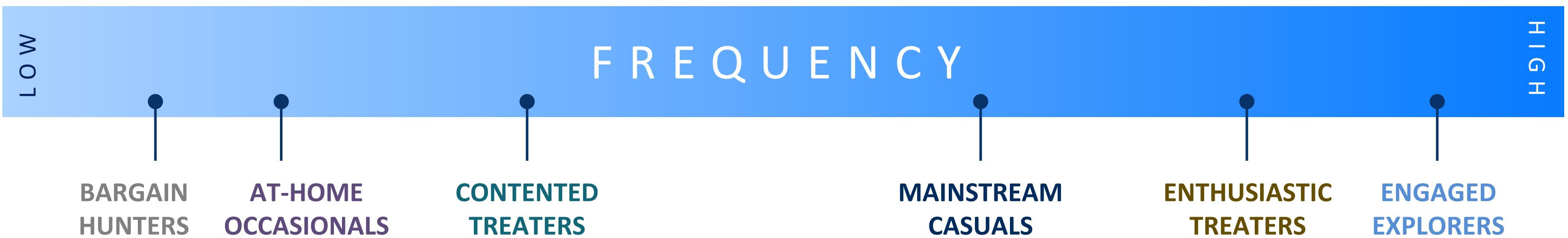


Sources: Wine Intelligence, Vinitrac® Brazil, October '19, January '20 and October '20, (n=2,993) Brazilian regular wine drinkers
Wine Intelligence, consumers interviews (n=7)

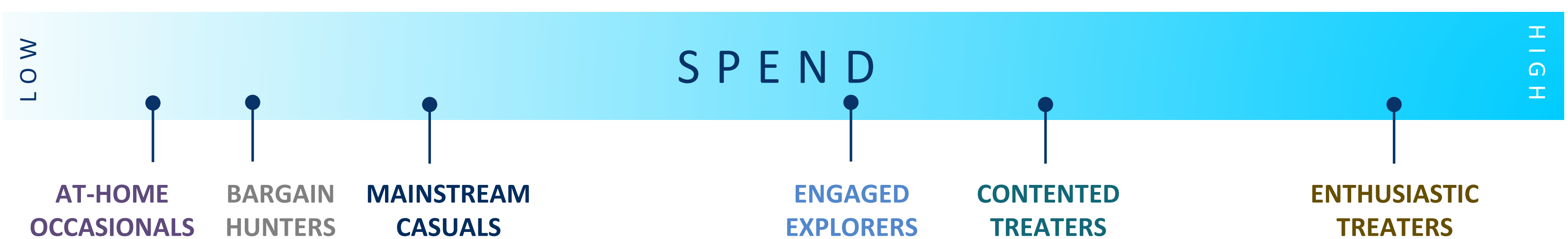
INTRODUCING THE PORTRAITS GROUPS: OVERVIEW

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)



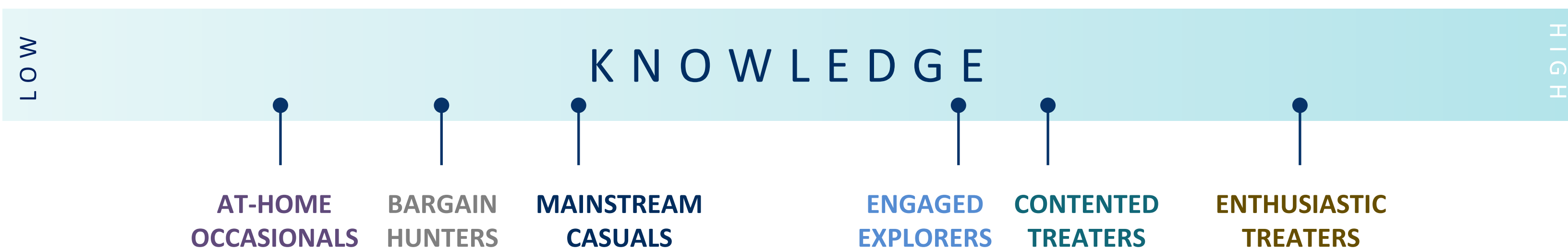
Sources: Wine Intelligence, Vinitrac® Brazil, October '19, January '20 and October '20, (n=2,993) Brazilian regular wine drinkers
Wine Intelligence, consumers interviews (n=7)

INTRODUCING THE PORTRAITS GROUPS: OVERVIEW

Analysis of wine involvement along with knowledge and confidence

Involvement in the wine category

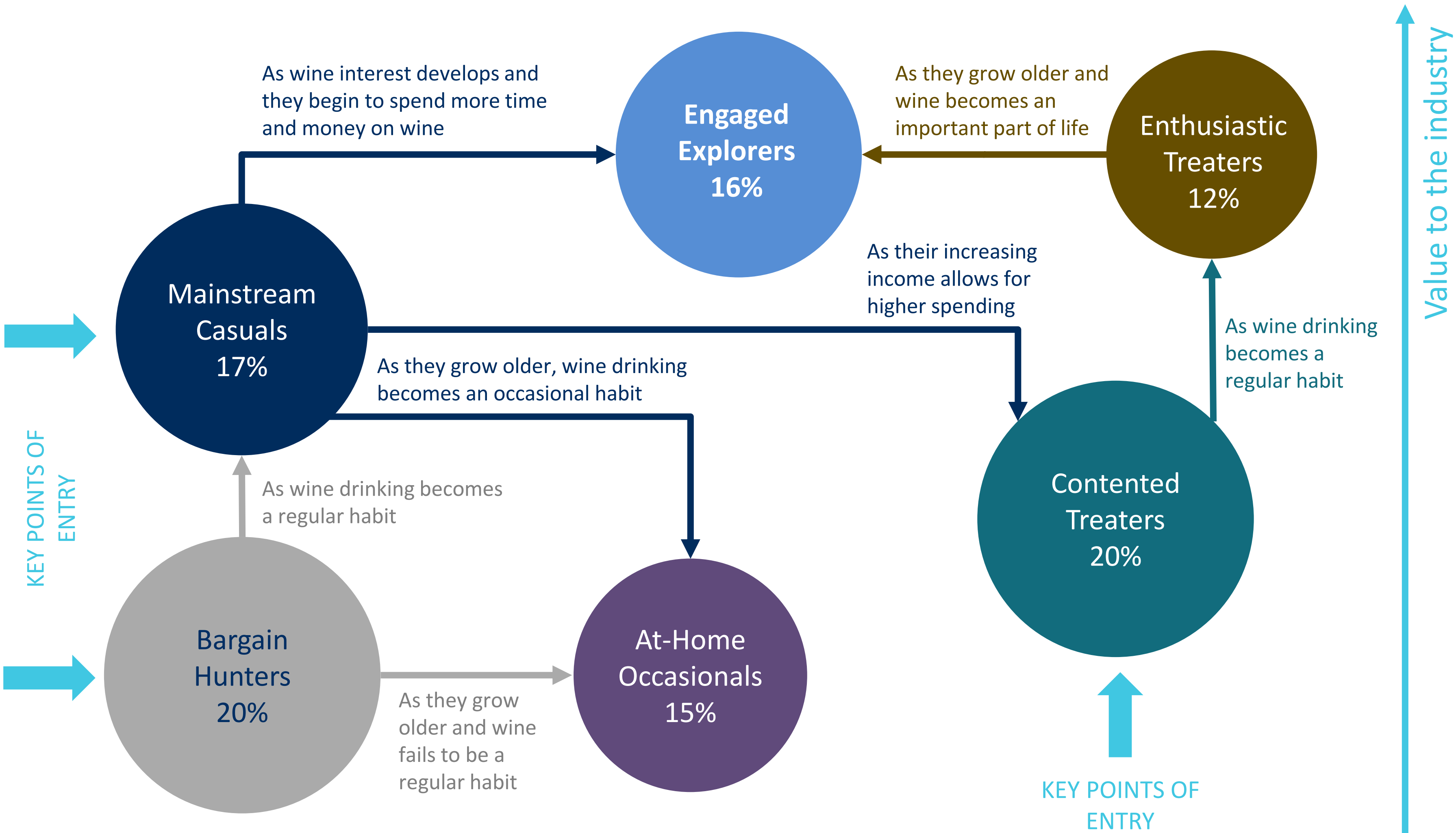
Knowledge level



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)

BRAZIL PORTRAITS: SEGMENT MIGRATIONS



Bubble size represents approximate share of population from that segment

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)

CONTENTS

ENTHUSIASTIC TREATERS: SUMMARY

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

They have a strong affinity to wine and tend to buy from more premium categories

Frequent and high spending wine consumers in both off- and on-trade; they account for about 1/3 of the market value

More likely to look for niche categories in terms of styles and brands

Use supermarkets significantly less and specialised shops or online channels significantly more

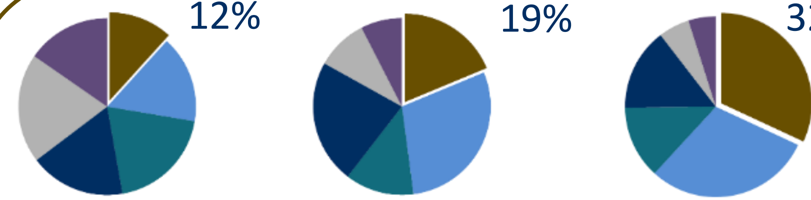
Explorative: Wine producing places are priority holiday destinations

ENTHUSIASTIC TREATERS: PROFILE

Enthusiastic Treaters are high spending consumers with a high income who take up roughly a third of the wine value consumed in Brazil

What you need to know

- More likely to be **younger males aged 25 to 34** who come from a **higher income group**
- Majority claim to be married and are currently living with their partner and children
- In line with their income, they are the **highest spending segment** in the Brazilian wine market, **taking up just under a third of the wine value in the market**
- Just under half of this segment are from the **Southeast region** in Brazil
- They are significantly digital with **over half of them having purchased wine on the internet** in the past 6 months
- Beside wine, they are generally more willing to pay more for other high-quality items



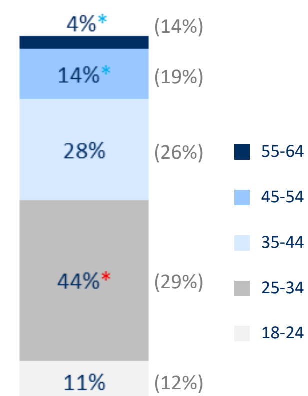
	Volume	Value
Off-trade	17%	27%
On-trade	21%	38%

Who are they?

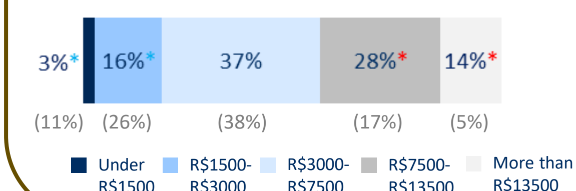
Gender

58% (53%) 42% (47%)

Age



Income



( ) 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, consumer in-depth interviews (n=7)

ENTHUSIASTIC TREATERS: MOTIVATIONS

Strong affinity for wine; drinking wine is particularly relevant for personal pleasure in more intimate occasions

Why do they drink wine?

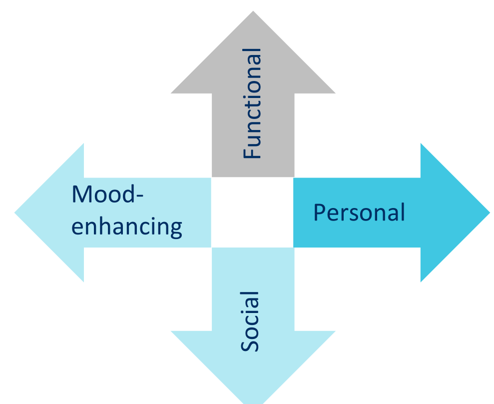
- **Enthusiastic Treaters** have strong affinity for wine, finding wine to be an important part of their lifestyle and will chose specific wines for specific occasions
- When they drink wine, it comes more as a personal treat or as an enhancer for smaller group socialising
- They are quite explorative in general with a higher proportion of consumers in this segment saying they **enjoy trying different styles of wine on a regular basis**
- Intimate occasions (for instance celebrating something personal with a partner) will be key moments for drinking a better wine
- They will drink wine to pair with food. This seems to be a key role of wine in their lives

"I will chose the type of wine and the grape depending on what I am going to eat"

"I like to drink with my partner and I will open a special bottle to celebrate a special occasion like our wedding anniversary"

A little more about Enthusiastic Treaters

- **Enthusiastic Treaters** are consumers from a more affluent background with a higher social status
- Social media is an important part of their life
- In line with their income, they are high spenders who are willing to spend more for high-quality items
- Culture and heritage is an important part of who they are



Key motivations for drinking wine

Secondary motivations for drinking wine

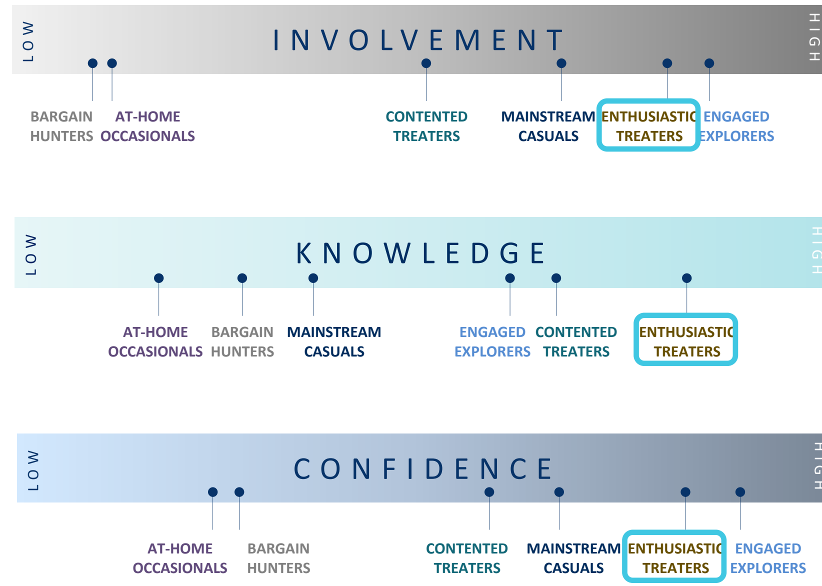
Sources: Wine Intelligence, Vinitrac® Brazil, October '19, January '20 and October '20, (n=2,993) Brazilian regular wine drinkers
Wine Intelligence, consumers interviews (n=7)

ENTHUSIASTIC TREATERS: WINE ENGAGEMENT

Confident and most knowledgeable; enjoy trying niche brands / styles and tend to go travelling to wine producing places

How do they engage with wine?

- Enthusiastic Treaters are **highly involved wine consumers.** They are significantly **confident** and are the **most knowledgeable wine consumers** among all the segments
- **Travelling to wine-growing regions and countries** are key engaging moments with the category and with specific styles
- They **enjoy trying out niche brands and styles**, so they tend to shop for wine more in specialised channels (e.g. wine stores, Emporios, directly from importers)
- They will regularly use the help of apps such as Instagram and Vivino
- Consistent with their higher income, Enthusiastic Treaters are high spending wine consumers who tend to look for the **best quality**



What influences their choice?

- While primarily led by grape variety when buying wine, their preference to drink wine while eating leads them to find choosing a style that would pair well with different foods important
- As the most knowledgeable wine consumer segment, Enthusiastic Treaters heavily rely on recommendations from professionals, but also from friends and family
- Labels seem to have an above average importance when choosing wine

"I have specific friends that will let me know about new wines. Sometimes I just follow them on Instagram. I also use Vivino"

"I had the opportunity to visit wineries and get to know more about wine that way"

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)

ENTHUSIASTIC TREATERS: BEVERAGE AND VARIETAL

Broad drinking repertoire; drink more white wine and other niche red varietals then average Brazilian wine drinkers

What do they drink?

- In line with their open attitude, Enthusiastic Treaters have a **broad drinking repertoire**
- Perhaps because of their broad repertoire, **red wine is less preferred** by Enthusiastic Treaters
- That said, this segment **drinks more white and rosé wine** than the average regular wine drinker in Brazil
- Consistent with their alcohol repertoire, this segment **over-indexes on many niche varietals**

Top 5 alcoholic beverages: Past 12 months

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

Beer	86% (85%)
Red wine	85%* (91%)
Whisky / Whiskey	66%* (41%)
White wine	66%* (50%)
Vodka	62%* (49%)

Top 5 white varietals they consume

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

Sauvignon Blanc	51%* (36%)
Chardonnay	47%* (38%)
Moscato	46%* (33%)
Chenin Blanc	31%* (16%)
Pinot Grigio / Pinot Gris	30%* (16%)

Top 5 red varietals they consume

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

Malbec	55%* (46%)
Merlot	49% (44%)
Cabernet Sauvignon	48% (45%)
Pinot Noir	37%* (27%)
Carménère	29%* (23%)

( ) All Brazilian regular wine drinkers

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

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Wine Intelligence, consumers interviews (n=7)

ENTHUSIASTIC TREATERS: WINE ORIGIN

Have a broad country / regional repertoire, over-indexing on wines from premium wine regions

What do they drink?

- Similar to their alcohol repertoire, Enthusiastic Treaters also drink wine **from a variety of countries and regions**
- Their taste for premium wine is reflected in their country / regional repertoire, **over-indexing on premium wine regions** such as Bordeaux, Tuscany, etc
- **Origin loyalty seems to be very connected to specific personal experiences** like travelling and food-pairing curated by a sommelier in a restaurant. These strong connections tend to have a lasting effect on origin affinity

> "I think I like Portuguese wines because when I went there I would drink wine at lunch and dinner. My family have Portuguese origin and they would constantly explain the history"

> "I was introduced to South African wines by a sommelier in a Japanese restaurant"

> "I love Argentinean wines. Every time I go to Argentina I bring lots of it home"

Top 5 countries of origin consumed

% who have drunk wine from the following places in the past 6 months

Country	%
Brazil	66% (71%)
Portugal	54%* (44%)
Italy	48%* (31%)
Chile	45% (47%)
France	43%* (22%)

Top 5 regions of origin purchased

% who have bought wine from the following wine-producing regions in the past 3 months

Region	%
Serra Gaúcha	43%* (48%)
Tuscany	29%* (18%)
Bordeaux	28%* (15%)
Vale dos Vinhedos	25%* (20%)
Mendoza	19% (16%)

( ) 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
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ENTHUSIASTIC TREATERS: WHICH BRANDS DO THEY BUY?

wine intelligence

Find brands less of an important factor when purchasing and tend to try out lesser-known brands at premium price points

What is their attitude towards brands?

- While brand recognition is still a relatively important factor that influences their purchase decision, **it is not the first thing they look at** and brand loyalty is weaker in general among these consumers
- They are more knowledgeable and experienced with the category, so they **tend to try out lesser-known brands** at more premium price points
- Recommendations and ratings play a very important role in finding new brands

"I like to try new things regularly – my friends are great at recommending new brands to try"

"I like to see what Vivino users say about the brand before purchasing it"

Brands you might find them drinking

Les Calandières
Casillero del Diablo
Casa Valduga Desde 1875
Clos du Val
Trivento
Casa Perini Est. 1929
Undurraga
Catena Zapata
Zuccardi
Esporão
Concha y Toro Desde 1883
Banfi Tuscany
Berne
Chandon
Lagares de Penalva
Cara Sucia
Ruffino
Garzón
Castillo de Molina
Bar Ahonda

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)

ENTHUSIASTIC TREATERS: OFF-TRADE

Typically buys wine from specialised wine / alcohol stores and online

Where do they buy wine?

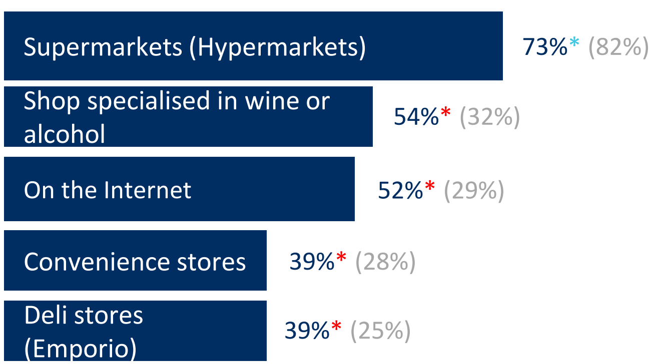
- As they look for premium, niche wines, they will tend to shop significantly more in **specialised wine / alcohol stores** and other specialised channels like wine clubs or direct from winery
- They are also the segment with the **highest incidence of online wine purchasing** among all consumers
- Consequently, **supermarkets are significantly less relevant**, although still the main purchasing channel

"I rarely buy in a supermarket. I think it is a bad experience, since there are millions of bottles and you don´t really get what is going on so you get lost"

"I like the convenience and credibility of buying online. I also like it as an experience because I can research more about the brands"

Top wine buying channels

% who have bought wine from the following channels in the past 6 months



Places where you might find them buying

Natural da Terra, Wine, World Wine, Decanter, Vinho & Ponto, Sonoma, Grand Cru, Pão de Açúcar, evino

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ENTHUSIASTIC TREATERS: OFF-TRADE

Frequent and highest spending segment; taste and indicators of wine styles are important factors driving wine-buying decisions

How do they shop in the off-trade?

- Despite the lower incidence of supermarket purchasing, they are **frequent drinkers in the off-trade**, coming right after Engaged Explorers, **mostly drinking wine as a relaxing drink at the end of the day**
- They are the **highest spending segment in the off-trade,** typically spending R$50.00 or more on a bottle of wine
- **Grape varietal and food pairing are the most relevant choice cues** when choosing which wine to buy while **promotions are less relevant** for this group than for the others

"I like to chose the right wine for the right occasion and food so therefore I tend to look at the grape varietal first"

"I always start at 50 real and from there I will go up. Maximum I have spent was 400 for a bottle to give as a gift"

Off-trade choice cue hierarchy

Food pairing*

Varietals*

Brand | Taste descriptions*

Origin*

* / * 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)

ENTHUSIASTIC TREATERS: ON-TRADE

Frequent and highest spending segment; typically found drinking wine as a relaxing drink out or with an informal meal at restaurants / bars / pubs

Wine in the on-trade

- Similar to their behaviour in the off-trade, Enthusiastic Treaters are also **frequent drinkers and the highest spending segment in the on-trade**
- Around 1/3 drink wine 1 to 5 times a week on informal on-trade occasions
- Their typical spend in the on-trade is **above R$90.00 for a bottle of wine**
- They tend to **closely analyse the wines on offer** at given restaurants and only ask for recommendation from the sommelier / restaurant staff once they have come up with a short list of their own
- Occasionally they will use Vivino to decide, and they will typically chose wines based on the **best food pairing option available**

"I will analyse the list and then ask for advice if I'm stuck between 2 or 3 options"

"Wine is always my priority drink in restaurants so the vast majority of times I go to restaurants I will drink wine"

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)

CONTENTS

ENGAGED EXPLORERS: SUMMARY

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

Wine is an essential part of their life

Eager to expand their knowledge of wine

Drink from mainstream categories but would also actively seek lesser known / niche varietals

Tend to buy wine from specialised channels and also from the internet

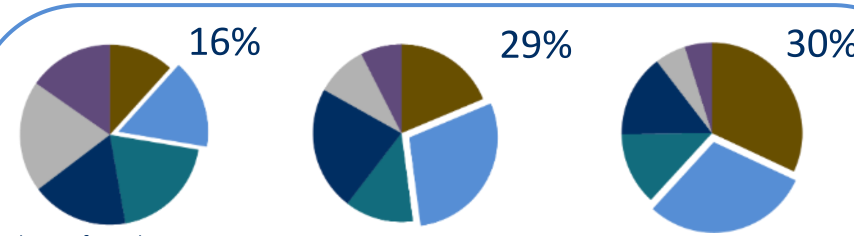
Generally adopt a more open attitude towards life and are conscious about new trends

ENGAGED EXPLORERS: PROFILE

Younger, medium-to-high income earners who are generally open to trying out new things in life

What you need to know

- Have similar gender split with the overall market
- More likely to come from a **younger age group** (less than 34 years old) with mid-to-higher income than average regular wine drinkers in Brazil
- Depending on the life stage they may be in, they are also more likely to be married or living with their partner and children
- They are **medium spenders,** highly involved with wine and take up over a quarter of the value / volume of wine in Brazil
- A higher proportion is from the Southeast
- Apart from wine, Engaged Explorers also generally **take on a more open and explorative attitude** towards other aspects of life. They are typically more ethically conscious and are more willing to try out new things

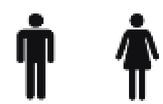


Share of regular wine drinker **population** | Share of total **volume** of wine consumed in Brazil | Share of total **value** of wine consumed in Brazil

	Volume	Value
Off-trade	26%	27%
On-trade	35%	33%

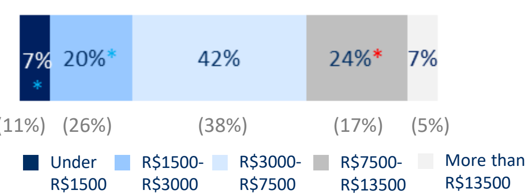
Who are they?

Gender

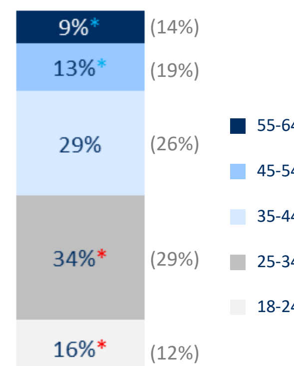


54% (53%) 46% (47%)

Income



Age



( ) 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)

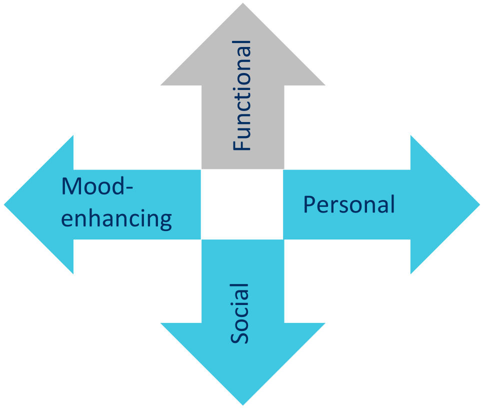
ENGAGED EXPLORERS: MOTIVATIONS

Wine enthusiasts who have strong affinity for wine; drinking wine is a way of displaying their sophisticated lifestyle to their peers

Why do they drink wine?

- **Engaged Explorers** are genuine **wine enthusiasts** who **drink wine for the pleasure**. **Wine is an important part of their personal and social lifestyle**
- Compared with other segments, a higher proportion of consumers in this segment say they **enjoy trying different styles of wine on a regular basis**
- To these consumers, wine is a beverage that **comes first in their mind on both formal and informal social occasions**. A key occasion will be while cooking with friends at home
- As this segment tends to be very active on social media and apps such as Vivino, drinking wine is a way to demonstrate their sophisticated, elegant lifestyle

"I love to drink wine at home with friends while we are cooking dinner because I tend to prefer red wines, and I don´t feel like drinking red during the day because it is too hot"



Key motivations for drinking wine

A little more about Engaged Explorers

- **Engaged Explorers** are consumers who take on an open, outgoing approach towards life. Risk-taking and exploring new options are exciting
- They are socially active (both online and offline) and always try to keep up with new trends. This may also be the reason why they are quite environmentally conscious and are willing to pay a little bit more for organic / sustainable wine or any product with a good social cause whenever they can.
- Culture and heritage is an important part of who they are

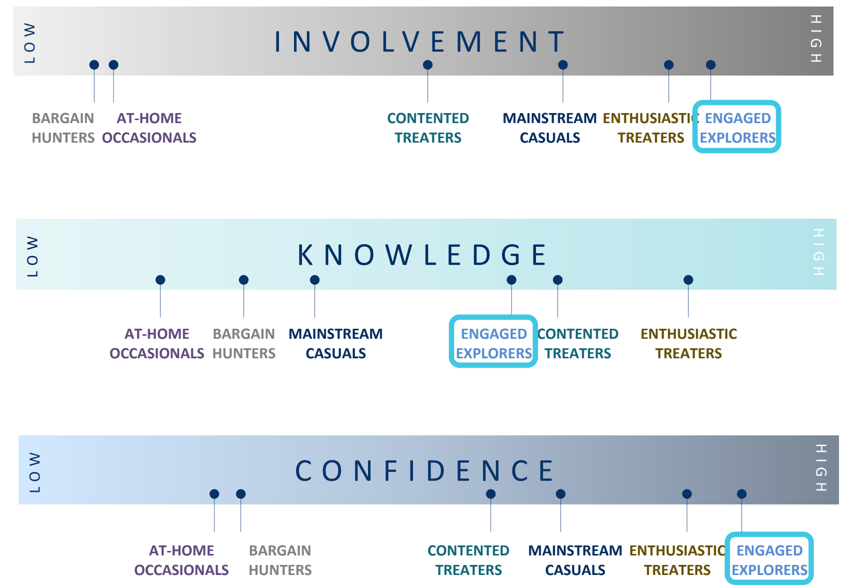
Sources: Wine Intelligence, Vinitrac® Brazil, October '19, January '20 and October '20, (n=2,993) Brazilian regular wine drinkers
Wine Intelligence, consumers interviews (n=7)

ENGAGED EXPLORERS: WINE ENGAGEMENT

Most involved and confident wine consumers who are eager to expand their wine knowledge and repertoire as they don't feel as knowledgeable

How do they engage with wine?

- Engaged Explorers are the most **involved consumers** in the wine category. They actively seek opportunities to expand their wine repertoire and to know more about it
- Though their **knowledge of wine is around average to good** (perhaps because they are just starting to learn about wine), they are very confident wine consumers and will use information platforms such as Vivino and social media to be informed
- As choosing a wine is an important decision for them, they are willing to **take their time to find the best quality / value ratio**, which is also inline with their general attitude towards other aspects of life
- They tend to **buy wines from famous producers** but would also explore niche varietals / brands



What influences their choice?

- As they are still learning about wine, a higher proportion of consumers from this segment rely on external validations such as apps, social media, recommendations by wine books / wine critics and shop staff or any medals / awards the wine has won
- Travels done to wine places in the past still dictate their taste

> "When I travel, I always research if there are wineries I can visit. If not, I will look into the local supermarkets and see what wines they are selling in other countries. I will typically look for the best quality available for my budget"

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)

ENGAGED EXPLORERS: BEVERAGE AND VARIETAL

Wine is their preferred drink; however, their open attitude is reflected in their broad alcoholic repertoire

What do they drink?

- Wine, in particular **red wine**, is their alcoholic beverage of choice for most occasions. They also drink significantly more white wine and rosé wine compared with the average Brazilian consumer
- Apart from wine, they also have a broad repertoire including Vodka, craft beer and Whiskey, over-indexing on all alcoholic beverages consumed aside from beer
- In alignment with their high confidence and involvement in the category, they are more likely to **drink from a variety of lesser-known / niche varietals** (eg Sémillon, Chenin Blanc, Primitivo)

Top 5 alcoholic beverages: Past 12 months

% who drink the following alcoholic beverages

Red wine	89% (91%)
Beer	85% (85%)
Vodka	60%* (49%)
White wine	57%* (50%)
Craft beer	56%* (46%)

Top 5 white varietals they consume

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

Chardonnay	50%* (38%)
Moscato	43%* (33%)
Sauvignon Blanc	37% (36%)
Chenin Blanc	26%* (16%)
Sémillon	25%* (14%)

Top 5 red varietals they consume

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

Malbec	53%* (46%)
Merlot	49% (44%)
Cabernet Sauvignon	44% (45%)
Pinot Noir	35%* (27%)
Carménère	28%* (23%)

( ) 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)

ENGAGED EXPLORERS: WINE ORIGIN

More willing to try wines from a diverse range of countries and regions of origin; interestingly, Chile is less relevant for them than it is for other segments

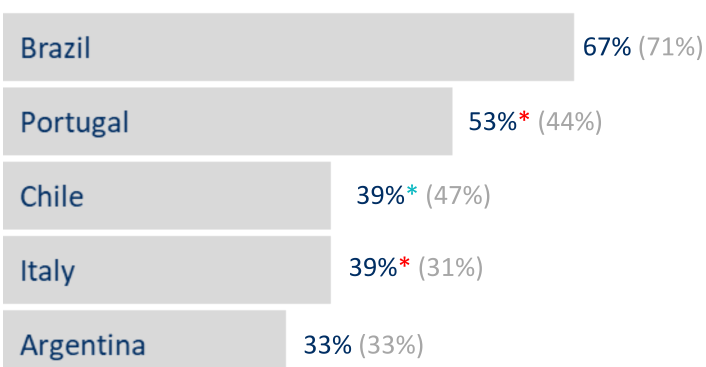
What do they drink?

- **Country and region of origin are some of the important factors** for choosing wine
- In line with their explorative attitude towards wine, Engaged Explorers have a broad country / region repertoire and **drink less from local or neighboring origins**
- This segment **drinks significantly more wine from the Old World** such as France, Portugal and Italy than the average Brazilian regular wine drinker

> "I tend to go for wines from the main producing countries: Italy, Portugal, Chile and Argentina. And also Spain, but I don't know Spanish wines so well"

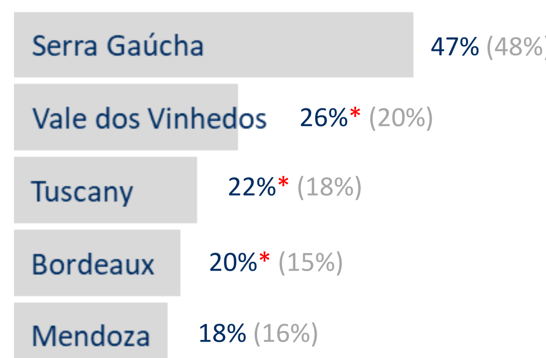
Top 5 countries of origin consumed

% who have drunk wine from the following places in the past 6 months



Top 5 regions of origin purchased

% who have bought wine from the following wine-producing regions in the past 3 months



( ) All Brazilian regular wine drinkers

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Wine Intelligence, consumers interviews (n=7)

ENGAGED EXPLORERS: WHICH BRANDS DO THEY BUY?

Mostly explore among bigger brands but would also seek opportunities within new / niche brands

What is their attitude towards brands?

- **Brand is a key factor** when choosing which wine to buy, particularly the **umbrella brand of a known producer**
- Engaged Explorers also **believe that advertised wines are better than non-advertised wine.** Therefore, their choice of brands are often large, popular mainstream brands and **their exploration will consist of trying out the different wines available from bigger brands and producers**
- That said, the group **would also try out new / niche brands whenever they can**

"If I chose a brand from a good producer, I know this will be a good choice"

"When I am shopping in a hurry, I will pick a wine that I know, but when I can, I like to spend some time researching about new wines"

Brands you might find them drinking

BACALHÔA
CATENA ZAPATA
CASAL GARCIA SINCE 1939
MonteVelho
ROBERT MONDAVI
FIN DEL MUNDO
VINÍCOLA SALTON
NIETO SENETINER DESDE 1888
PERIQUITA SINCE 1850
COURELA
CHANDON
Casillero del Diablo
SANTA CAROLINA CHILE 1875
GatoNegro
CANEPA
partridge
UNDURRAGA
EA
CASA VALDUGA DESDE 1875
Viña Carrasco WINE OF CHILE

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)

ENGAGED EXPLORERS: OFF-TRADE

They will use a variety of wine buying channels and will typically seek the advice of the shop staff

Where do they buy wine?

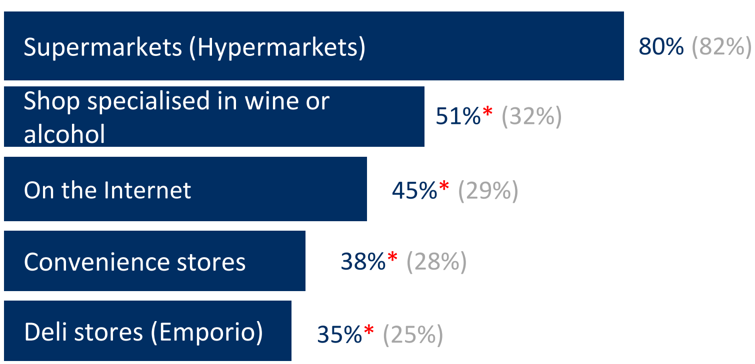
- Engaged Explorers are confident consumers and will **buy wine from a broad variety of wine-buying channels.** Apart from Supermarkets, online and specialised shops are significantly more relevant to them
- They are also more likely to be buying wine from **specialised channels such as wine clubs, specialised wine shops and Emporios**
- **They will typically look for quality deals** and are available to spend more than other segments, but not as much as Enthusiastic Treaters

"Sometimes I go to the larger shops (supermarkets) but whenever I can I prefer going to the smaller specialised ones so I can chose the right wines. I usually ask for information and recommendations from the staff"

"Usually the shop staff will help me chose"

Top wine buying channels

% who have bought wine from the following channels in the past 6 months



Places where you might find them buying

( ) 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)

ENGAGED EXPLORERS: OFF-TRADE

Very frequent drinkers and medium-to-high spenders; brand and taste for food-pairing are two key factors determining purchase decisions

How do they shop in the off-trade?

- **Brand** (particularly the umbrella producer brand) is an important factor when buying wine
- Roughly 3 of 4 consumers reported drinking wine to relax at home more than once a week. They enjoy drinking at home while cooking so **varietal and food-pairing are important factors**
- Majority tends to **spend R$50 to R$80** on a bottle of wine
- Beside brand, **taste descriptors and origins** (both an indicator of wine style and taste) are also key factors determining their wine-purchasing decisions

"The brand is important because it gives me reassurance. And the grape is very important too because it will tell me with which type of food I should be drinking that wine"

"I am more familiar with specific wineries and counties, so I will look for the best deal from those"

Off-trade choice cue hierarchy

Brand*

Food pairing* | Varietals*

Taste descriptions on wine bottle*

Origin*

* / * 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)

ENGAGED EXPLORERS: ON-TRADE

Most frequent drinkers and second highest spenders in the on-trade; likely to be found drinking wine as a relaxing drink out or with an informal meal at a bar or restaurant

Wine in the on-trade

- Engaged Explorers are the **most frequent drinkers** in the on-trade, often drinking wine as a **relaxing drink out or with an informal meal in a pub / bar / restaurant**
- They will **seek out the advice of sommelier** and restaurant staff to make their choices
- Choice will depend on **type of food** primarily
- Consumers in this segment are also the **second highest spenders in the on-trade**, with majority spending around R$80 on a bottle of wine for informal occasions and up to R$150 if it is a more formal occasion

"If there is a sommelier, I will always ask for advice. I am open to their recommendation"

"Before the pandemic, I would go to a restaurant at least once per week. Here in Salvador there are amazing restaurants"

"The last time I went to a restaurant I spent R$110. That time me and my husband only ordered some finger food to go with the wine"

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)

CONTENTS

CONTENTED TREATERS: SUMMARY

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

Infrequent, high spending consumers, drinking wine around once a month

Care more about taste, quality and brand. Less concerned about origin

Buy wine from both supermarkets and specialised alcohol stores

Whenever they drink wine, they tend to buy wine from mid-to-premium range as a treat

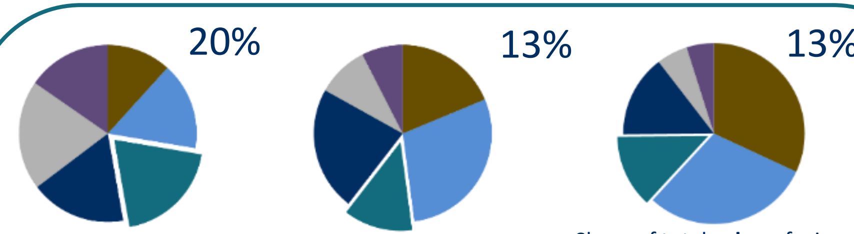
Their repertoire consists mostly of mainstream and some niche varietals

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



Share of regular wine drinker **population**

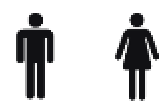
Share of total **volume** of wine consumed in Brazil

Share of total **value** of wine consumed in Brazil

	Volume	Value
Off-trade	14%	16%
On-trade	10%	10%

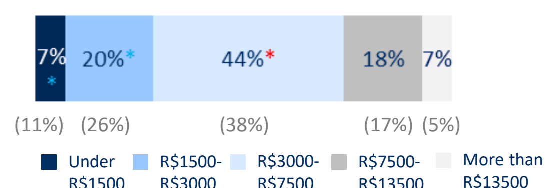
Who are they?

Gender

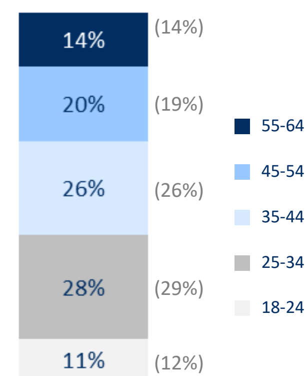


54% (53%) 46% (47%)

Income



Age



( ) All Brazilian regular wine drinkers

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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)

CONTENTED TREATERS: MOTIVATIONS

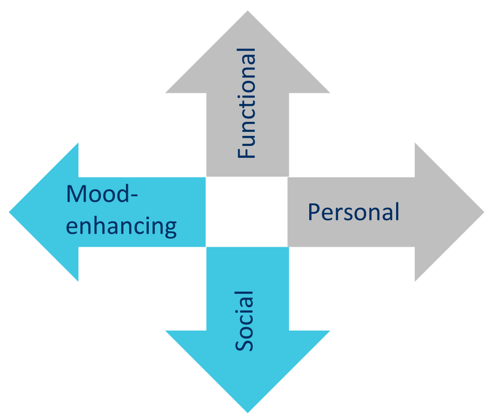
They drink wine primarily as an occasional treat and a socialising medium

Why do they drink wine?

- Compared to other segments, Contented Treaters are **only fairly interested in wine**. While other segments actively seek opportunities to drink wine and build their wine experience, consumers from this segment drink wine more as a mood-enhancer and for social occasions
- To Contented Treaters, wine is more like a medium that helps them **socialise with others and stay in trend.** They like to use wine to celebrate something special
- That said, wine is still considered as a nice drink to occasionally enjoy as treat at home or at friends' / family's houses
- They drink in the on-trade less often

"I drink wine to celebrate"

"I usually drink wine with friends. Like 3 or 4 friends while having dinner or listening to music"



Key motivations for drinking wine

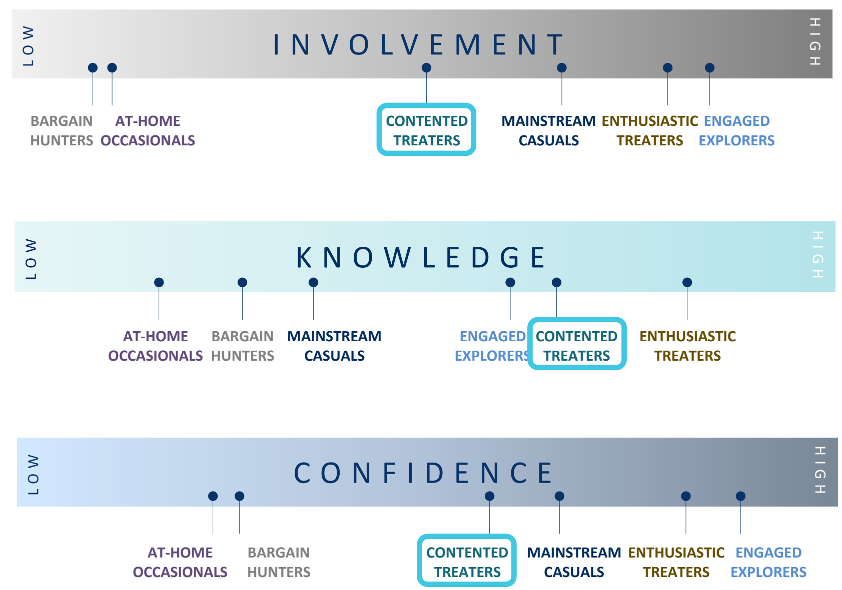
Sources: Wine Intelligence, Vinitrac® Brazil, October '19, January '20 and October '20, (n=2,993) Brazilian regular wine drinkers
Wine Intelligence, consumers interviews (n=7)

CONTENTED TREATERS: WINE ENGAGEMENT

Medium involved, fairly confident wine drinkers with good level of wine knowledge; drinks mostly more premium but mainstream varietals / brands

How do they engage with wine?

- Contented Treaters are consumers with a medium level of involvement with the wine category and drink only occasionally in both the on- and off-trade
- Despite being the second most knowledgeable segment, they are only fairly confident with their wine knowledge
- They are open to **enjoying niche brands and varietals** whenever they can, but because they drink wine only occasionally, **they tend to buy more premium versions of mainstream options** that are widely available in the market
- Whenever they do drink wine, they tend to treat themselves with good quality



What influences their choice?

- This segment is primarily varietal- and origin-driven
- They attribute great importance to wine-food pairing
- As they are not very confident with their wine knowledge, a large proportion of this segment also make use available information and recommendations

"Grape varietal is the most important thing – if I know it I will buy it. And I like to ask for recommendations"

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)

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 alcoholic beverages: Past 12 months

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

Red wine	91% (91%)
Beer	87% (85%)
White wine	55%* (50%)
Craft beer	53%* (46%)
Vodka	52%* (49%)

Top 5 white varietals they consume

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

Chardonnay	46%* (38%)
Sauvignon Blanc	43%* (36%)
Moscato	33% (33%)
Pinot Grigio / Pinot Gris	19% (16%)
Chenin Blanc	18% (16%)

Top 5 red varietals they consume

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

Malbec	53%* (46%)
Cabernet Sauvignon	53%* (45%)
Merlot	49%* (44%)
Pinot Noir	33%* (27%)
Carménère	27%* (23%)

(( ) 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)

CONTENTED TREATERS: WINE ORIGIN

Contented Treaters tend to drink wine from origins that are widely available in the market

What do they drink?

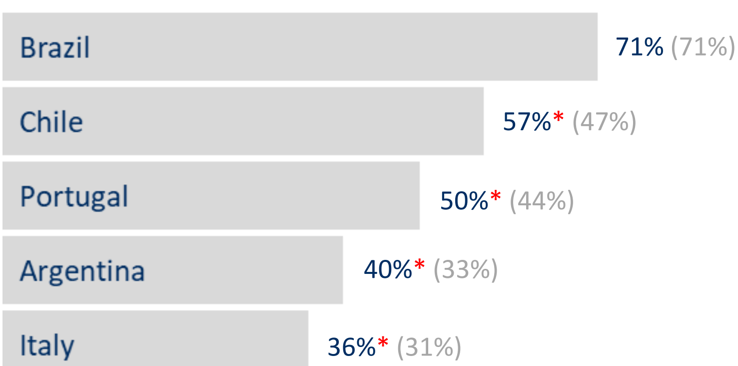
- Contented Treaters rarely go out of their way to look for niche origins; therefore, they tend to drink wine that they can find readily available in the market
- A significantly higher proportion of consumers drink wines from Portugal and from Mendonza

"I drink Chilean and Argentinean wines regularly. Also Italian wines but for more special occasions"

"I love Portuguese wines, particularly from Alentejo – I don´t know much about other Portuguese regions"

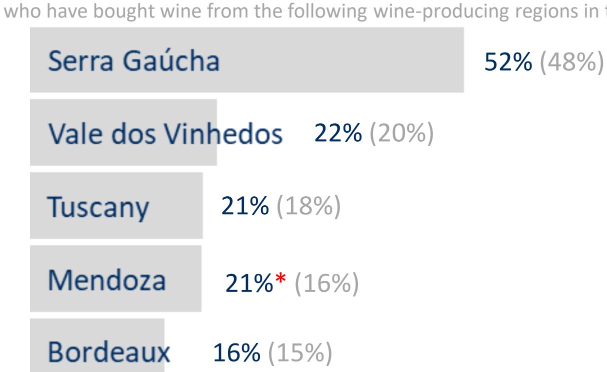
Top 5 countries of origin consumed

% who have drunk wine from the following places in the past 6 months



Top 5 regions of origin purchased

% who have bought wine from the following wine-producing regions in the past 3 months



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Wine Intelligence, consumers interviews (n=7)

CONTENTED TREATERS: WHICH BRANDS DO THEY BUY?

Brands aren't a major factor in determining wine purchases

What is their attitude towards brands?

- **Brands aren't the most important factor when buying wine**, but Contended Treaters tend to go for more established brands that will also have more premium offers
- **Occasionally they will also try niche brands** with medium to premium price points; in general, though, they like to follow the advice of friends

> "I like to meet my friends and everyone will bring a bottle of wine so we can all try it out"

Brands you might find them drinking

CONCHA Y TORO DESDE 1883
CHANDON
SANTA HELENA
VINÍCOLA SALTON
MASI
Porta 6
PERIQUITA SINCE 1850
PÉRGOLA
ALTA VISTA
MONTGRAS.
CRIOS
GatoNegro
SALENTEIN
VINÍCOLA AURORA
MIOLO WINE GROUP
EPU

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)

CONTENTED TREATERS: OFF-TRADE

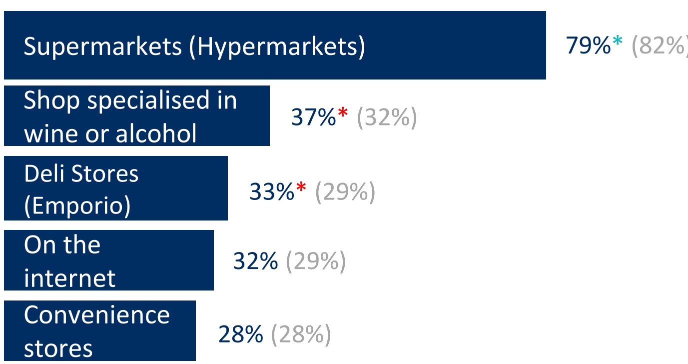
Specialised wine / alcohol stores are used by a significantly larger proportion of Contented Treaters when compared to all regular wine drinkers

Where do they buy wine?

- Supermarket remains the main wine-buying channel for Contented Treaters, although they **will use it significantly less** compared with other segments
- They also tend to shop for wine in more specialised wine / alcohol stores
- About a third of the segment recalled they have bought wine from Deli Stores in the past 6 months

Top wine buying channels

% who have bought wine from the following channels in the past 6 months



Places where you might find them buying

( ) All Brazilian regular wine drinkers

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Wine Intelligence, consumers interviews (n=7)

CONTENTED TREATERS: OFF-TRADE AND ON-TRADE

Despite being infrequent drinkers in both off- and on-trade, the segment tends to spend a lot on wine whenever they do drink wine

How do they shop in the off-trade?

- As the segment name suggests, Contented Treaters are less frequent drinkers of wine, but when they do drink wine, it is mostly as a relaxing drink or with an informal meal at home
- They tend to spend above average on wine as a treat. They are the second highest spending segment in the off-trade. Their typical spend is around R$60 or more on a bottle of wine
- When buying wine, food pairing and varietals are two significant factors for Contented Treaters

Off-trade choice cue hierarchy

Food pairing*

↓

Varietals*

↓

Brand

↓

Taste descriptions | Recommendations from friends / family

Wine in the on-trade

- Contented Treaters don't drink often in the on-trade
- Similar to their behaviours in the off-trade, whenever they do drink wine in the on-trade, they would treat themselves to some good wine in the medium-to-high price brackets

> "It is hard to find a good wine for less than R$70. On average I will spend R$90 to R$100 in shops"

> "Apart from the grape varietal, I will always look for wines that were recommended. In general I will only buy Reserva and Gran Reserva because these are better"

* / * 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)

CONTENTS

MAINSTREAM CASUALS: SUMMARY

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

They prefer drinking wine at home with family or friends for relaxation

They claim to be adventurous drinkers, but mostly explore within mainstream categories

Taste descriptions and brands are important factors during purchase

They have moderate confidence and knowledge of wine

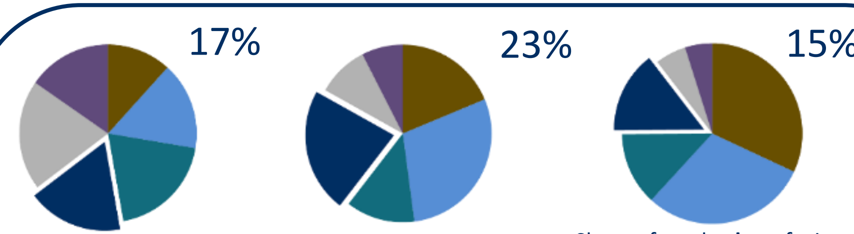
They mostly buy entry-level to mid-range wine for personal consumption

MAINSTREAM CASUALS: PROFILE

They are the second largest segment and represent over a fifth of the wine drunk in the off-trade and over a quarter of the wine drunk in the on-trade

What you need to know

- **Similar gender and age split to the average Brazilian regular wine drinker**
- Tend to have mid-to-lower, below average, income earnings
- In line with their earnings, their **spending on wine tends to be more on the entry-level wines**, which represent only about 15% of the total wine value in Brazil
- Despite this lower value, this segment drinks wine frequently and **takes up almost a quarter of the wine volume consumed in Brazil**
- Only over a third comes from the Southeast region (38%* vs 44%), while about a third comes from the Northeast (32%* vs 26%)
- This segment displays the closest resemblance to wine consumers from other developed markets



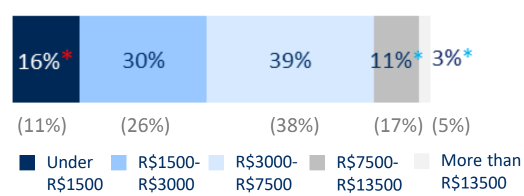
Share of regular wine drinker **population**	Share of total **volume** of wine consumed in Brazil	Share of total **value** of wine consumed in Brazil
17%	23%	15%
Off-trade	21%	14%
On-trade	26%	15%

Who are they?

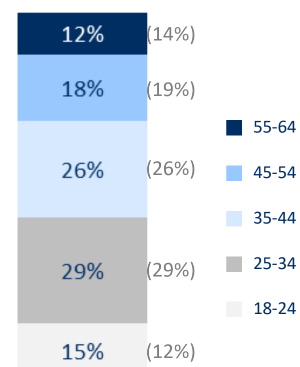
Gender

54% (53%) 46% (47%)

Income



Age



( ) 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)

MAINSTREAM CASUALS: MOTIVATIONS

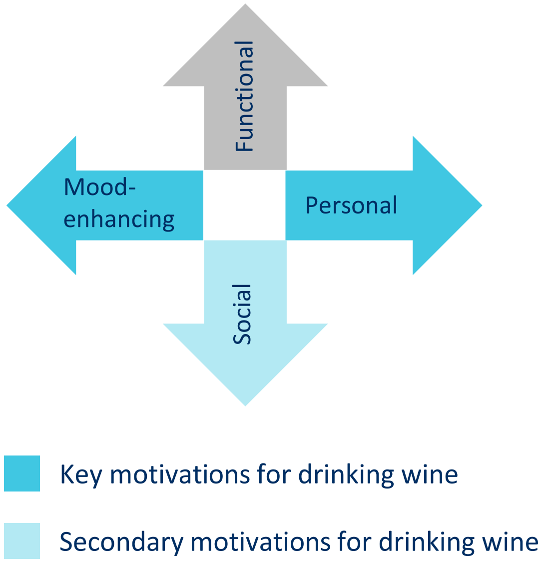
Interested in wine; mostly drink to relax at the end of the day at home

Why do they drink wine?

- **Mainstream Casuals** display strong interest in wine and think that wine plays an important role in their lives
- They drink wine mostly for personal enjoyment or relaxation at the end of the day. **Around 2 in 3 consumers say they drink wine to relax at home or with an informal meal**
- Wine is something they see as a **good companion for both off-trade and on-trade occasions**

A little more about Mainstream Casuals

- **Mainstream Casuals** are the **average consumers in the Brazilian market**
- They are price savvy consumers who try their best to find the best value / price ratio whenever they can. At the same time, they aren't consumers who would just grab whatever is cheapest on the shelf. Rather, quality is something important to them, so they are willing to occasionally pay a bit more for better quality wine or wine that fits with their social values (e.g. sustainably produced wine)
- They are significantly more likely to be influenced by adverts and believe brands advertised are better than brands that are not advertised



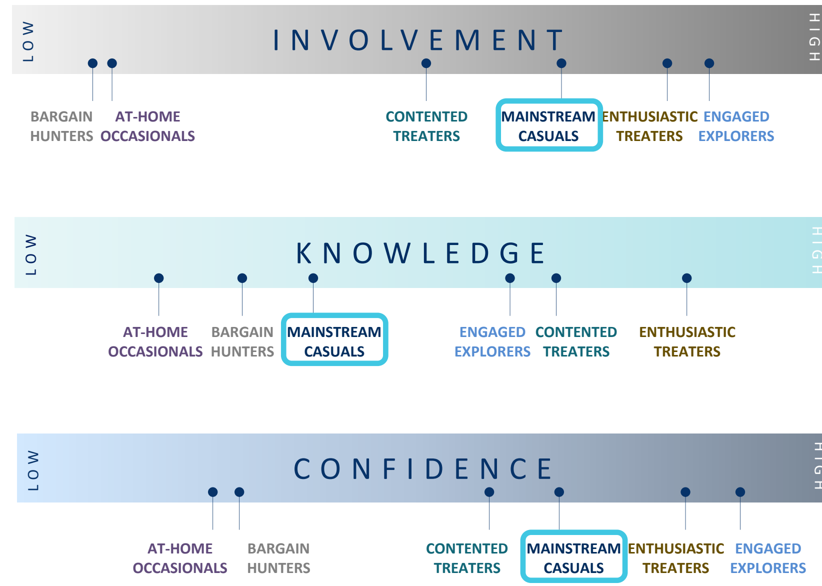
Sources: Wine Intelligence, Vinitrac® Brazil, October '19, January '20 and October '20, (n=2,993) Brazilian regular wine drinkers
Wine Intelligence, consumers interviews (n=7)

MAINSTREAM CASUALS: WINE ENGAGEMENT

Medium to highly involved wine consumers that mainly stick to the mainstream category

How do they engage with wine?

- Mainstream Casuals are **medium to highly involved wine consumers**
- They have **moderate level of knowledge and feel relatively confident about their wine knowledge**
- They **drink wine quite often** in both off- and on-trade
- As choosing a wine is an important decision for them, they are willing to take their time to **find the best quality / value ratio**
- They enjoy trying different wines on regular basis, but perhaps related to where they shop, this segment mostly buys mainstream varietals or brands



What influences their choice?

- **Promotional offers** are one of the key factors influencing their choice
- Consistent with their level of confidence, a high proportion of consumers from this segment **rely on recommendations from professionals** when it comes to choosing wine. They also rely on external validations like medals or awards.
- They also rely on taste descriptions displayed on shelf to help them make decisions

"I have always been open to try new brands – I am curious and I don´t like to get drunk"

"I observe and analyse the bottle a lot and always look at the price"

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)

MAINSTREAM CASUALS: BEVERAGE AND VARIETAL

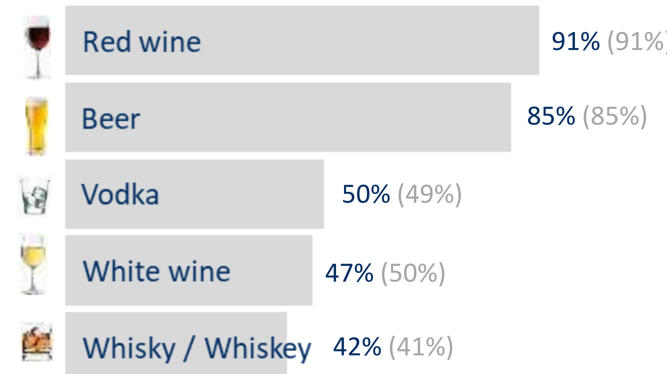
Red wine is their most preferred drink, followed by beer

What do they drink?

- **Red wine** is the **most dominant alcohol drink** in their repertoire, which is similar to the average regular wine drinkers in Brazil
- They tend to go for mainstream varietals but have a lower incidence on Merlot and Cabernet Sauvignon when compared to the average consumer

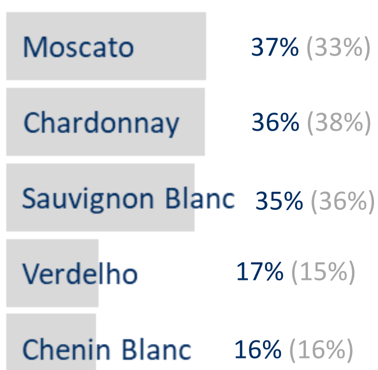
Top 5 alcoholic beverages: Past 12 months

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



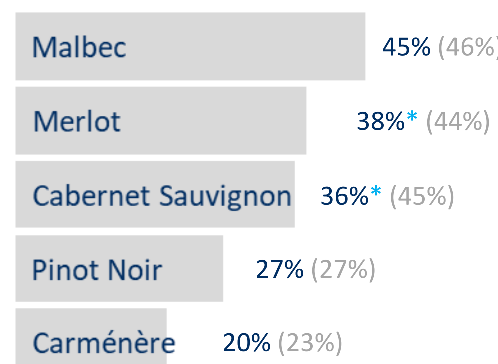
Top 5 white varietals they consume

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

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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)

MAINSTREAM CASUALS: WINE ORIGIN

They drink wines from a variety of countries and regions, but a significantly lower proportion of Mainstream Casuals drinks wines from Chile

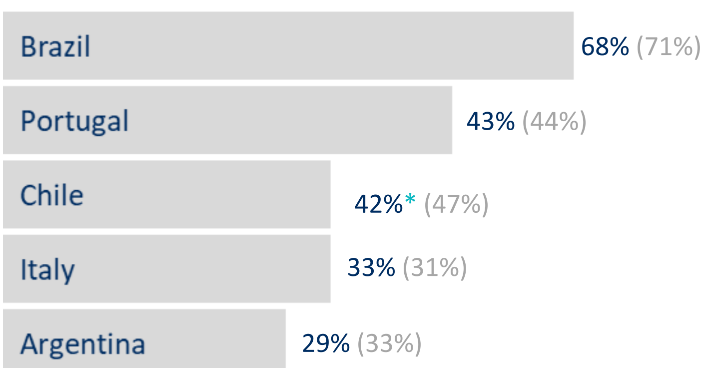
What do they drink?

- Mainstream Casuals **drink wine that is readily available in the market** (e.g. wines from local wine regions, Portuguese wine)
- That said, this segment also drinks wine from the **classic Old World** wine regions such as Tuscany, Bordeaux, etc
- While Chilean wine is still the third most consumed country of origin, Mainstream Casuals are significantly **less likely to drink wines from Chile** than the average wine drinkers in Brazil

> "There is a lot of Brazilian wine that I like. Chilean and Argentinean I think are very good. The Spanish wines are amazing"

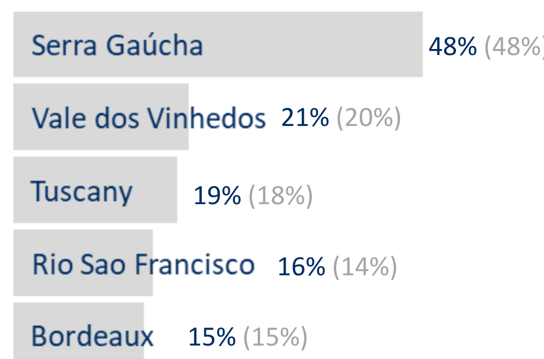
Top 5 countries of origin consumed

% who have drunk wine from the following places in the past 6 months



Top 5 regions of origin purchased

% who have bought wine from the following wine-producing regions in the past 3 months



( ) All Brazilian regular wine drinkers
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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)

MAINSTREAM CASUALS: WHICH BRANDS DO THEY BUY?

Mainstream Casuals mostly buy mainstream brands with low to medium price points

What is their attitude towards brands?

- **Brand is a key factor** when choosing a bottle of wine
- They find **advertised wine is better than non-advertised wine**, hence their choice of brands is often large, popular mainstream brands
- Mostly purchase mainstream brands with **low to medium price points**

> "I usually check the grape varietal, and then I try to remember if I know the brand or if there is any brand with a grape that has been recommended to me by a friend. If not, I will risk and try – and then if I like, I will repeat"

Brands you might find them drinking

PÉRGOLA
TORO LOCO
VINÍCOLA SALTON
MIOLO
VINÍCOLA AURORA
Sangue de Boi
SANTA HELENA
QUINTA do MORGADO
RESERVADO CONCHA Y TORO
CANÇÃO

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)

MAINSTREAM CASUALS: OFF-TRADE

Mainstream Casuals tend to pick up a bottle of wine while doing grocery shopping at a supermarket. They will also be more likely found in convenience stores and atacarejo

Where do they buy wine?

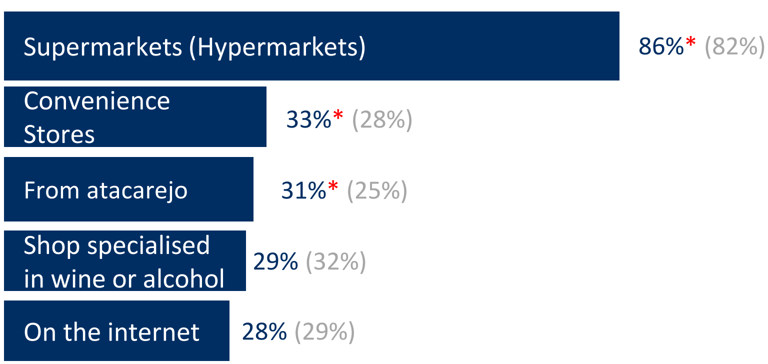
- **Convenience** is an important factor for Mainstream Casuals. They like to buy more than one bottle at a time if they come with discount
- They mostly buy wine from **supermarkets** while they do their regular grocery shopping
- Other channels they also like to use are convenience stores and atacarejo

"I buy 3 bottles each time when I find deals. I then leave it on the kitchen shelf"

"I use Pão de Açucar out of convenience – it is near me"

Top wine buying channels

% who have bought wine from the following channels in the past 6 months



Places where you might find them buying

( ) 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)

MAINSTREAM CASUALS: OFF-TRADE

Apart from brand, taste descriptions are an important factor when choosing wine – more important for them then for the average consumer

How do they shop in the off-trade?

- Mainstream Casuals are frequent drinkers with a lower spend in the off-trade
- They drink wine between 1 to 5 times a week across all occasions
- They typically spend between R$15.00 to R$39.00 on a bottle of wine
- In line with their interest in wine, **taste descriptions** about the wine that are displayed on shopping shelves and on the back label are an important purchase driver
- Brands they already know will also be more likely to be picked
- Mainstream Casuals are price savvy consumers. While **price / discount offers** are not what they would consider first when choosing a bottle of wine, it is still a relatively more important factor to this segment than to other consumers

Off-trade choice cue hierarchy

Taste descriptions* | Brand

Food pairing

Varietals

Recommendation by friend / family

"I like to ask my husband's opinion as well – we will choose together and look at the price, the quality, the grape… sometimes if the wine has any medals as well"

* / * 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)

MAINSTREAM CASUALS: ON-TRADE

Mid-to-lower spenders in the on-trade who drink wine as a relaxing drink out at the end of the day

Wine in the on-trade

- Mainstream Casuals don't drink as often in the on-trade as they do in the off-trade, **but still they represent about ¼ of the wine being drunk in bars and restaurants** in Brazil. When they do drink in the on-trade the often drink it as a **relaxing drink out at the end of the day**
- Almost 2 out of every 3 Mainstream Casuals drink wine relatively regularly **for personal enjoyment and relaxation at the end of the day in bars and restaurants**
- They tend to spend a bit more than they do in the off-trade, but are still **mid-to-lower spenders,** typically never spending less than R$50.00 on a bottle of wine
- The type of food is the main driver for choosing which wine they will buy. They will typically ask for recommendation on the best food paring tips from the restaurant staff

"I always drink wine is I go to a pizzeria"

"It depends on the type of restaurant – in a Japanese restaurant, I usually don´t drink wine because it doesn´t go well with the type of Japanese food I like"

"I usually ask for advice. I will always look into the wine list but typically wine lists don´t give any information about food pairing"

"I like when restaurants offer those smaller bottles, especially when I am the only one drinking"

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)

CONTENTS

BARGAIN HUNTERS: SUMMARY

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

Low frequency and low spending drinker both on- and off-trade

Low interest in the category; mostly buy wines that are widely available in any store

Promotional offers are one of their key factors when purchasing

They buy wine from supermarkets that often offer good deals

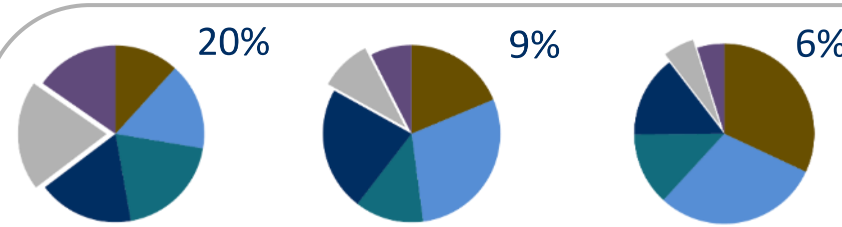
Narrowest repertoire, not interested in learning more about wine

BARGAIN HUNTERS: PROFILE

Older, medium income wine drinkers with the least involvement with wine

What you need to know

- Bargain Hunters are the oldest wine drinkers and have medium income
- Promotions play a key role in their behavior towards wine
- They are the least frequent drinkers and one of the lowest spending groups in the off-trade and the least involved group of consumers with little interest in know more about wine
- Perhaps reflecting on their stage of life, they have a well-developed preferences and are less swayed by the fashion trends
- They tend to stick to what they know when buying wine or whatever options that fits their budget
- Roughly a fifth of this segment is from the South



Share of regular wine drinker **population** | Share of total **volume** of wine consumed in Brazil | Share of total **value** of wine consumed in Brazil

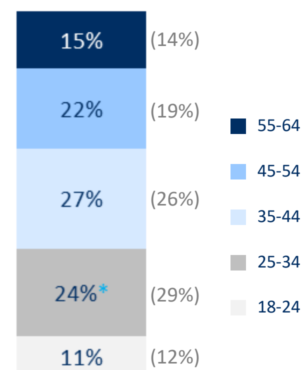
	Volume	Value
Off-trade	11%	7%
On-trade	6%	3%

Who are they?

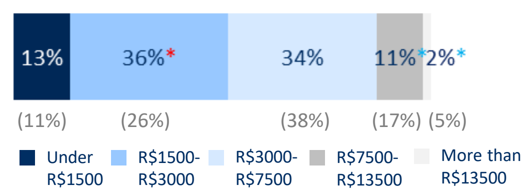
Gender

50% (53%) 50% (47%)

Age



Income



( ) All Brazilian regular wine drinkers

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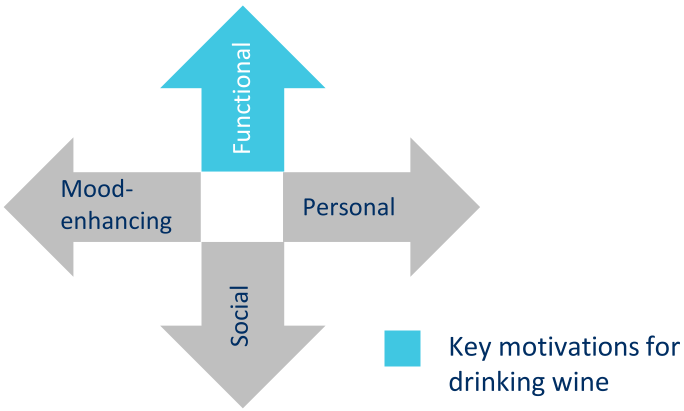
Sources: Wine Intelligence, Vinitrac® Brazil, October '19, January '20 and October '20, (n=2,993) Brazilian regular wine drinkers
Wine Intelligence, consumers interviews (n=7)

BARGAIN HUNTERS: MOTIVATIONS AND WINE ENGAGEMENT

Low involvement and little interest in learning more about wine; wine is a drink they occasionally consume to relax at the end of the day

Why do they drink wine and how do they engage with wine?

- Compared to all Brazilian regular wine drinkers, significantly fewer consumers in this segment consider wine as an important part of their lifestyle
- A high percentage claim they don't know a lot about wine and have little awareness of brands, wine origins, varietals, etc
- They are not keen to learn more about wine. For them, wine is merely a drink they have occasionally (e.g. once a month) at home or as a drink out at the end of the day



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)

BARGAIN HUNTERS: WHAT DO THEY DRINK?

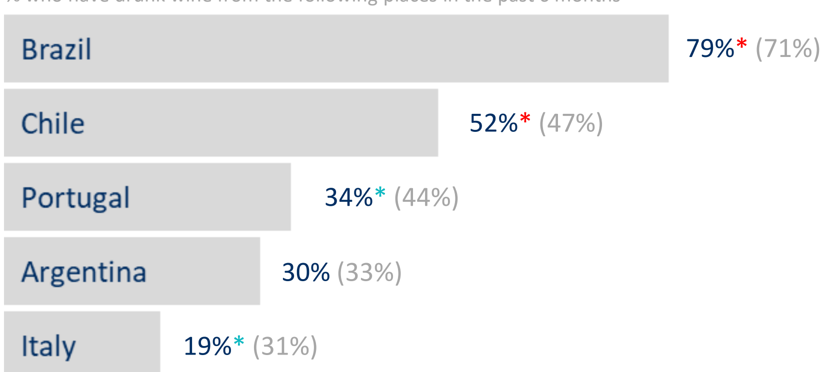
Bargain Hunters have the narrowest repertoire, tend to stick to mainstream wine and brands and will typically drink reds. They over index for Brazilian and Chilean wines

What do they drink?

- Significantly higher proportion have drunk red wine in the past year than average regular wine drinkers in Brazil
- On the other hand, significantly fewer consumers in this segment say they have drunk white wine in the past year
- They tend to stick to the mainstream wine / brands that can be easily found in the market, e.g. Brazilian wine, Chilean wine, etc

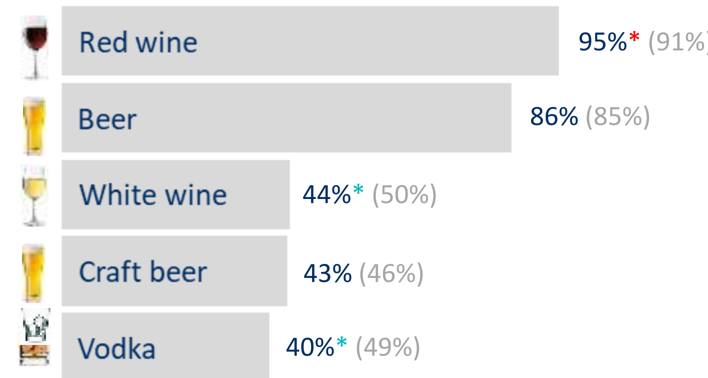
Top 5 countries of origin consumed

% who have drunk wine from the following places in the past 6 months



Top 5 alcoholic beverages: Past 12 months

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



Brands you might find them drinking

QUINTA do MORGADO

PÉRGOLA

SANTA HELENA

VINÍCOLA SALTON

( ) 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)

BARGAIN HUNTERS: OFF-TRADE AND ON-TRADE

Infrequent drinkers in both off- and on-trade; promotional offers are a key factor when buying wine in the off-trade

Wine in the off-trade

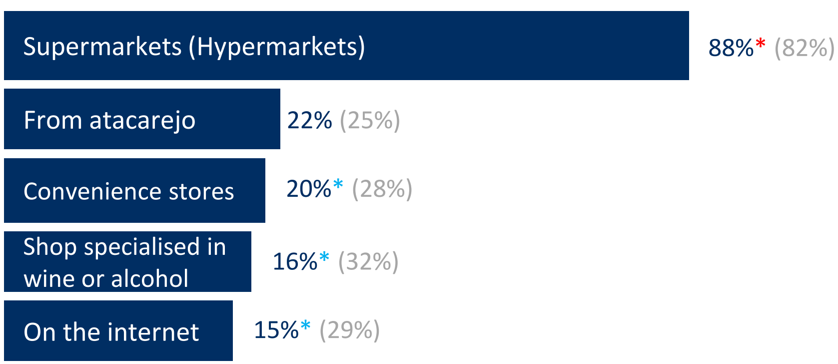
- Bargain Hunters **drink wine in the off-trade around once a month or less**
- They are one of the lowest spending segments in the off-trade
- They mostly buy from **supermarkets**
- Whenever they choose wine, **promotional offers are something they look for often** when choosing which wine to buy

Wine in the on-trade

- Bargain Hunters rarely drink in the on-trade (less than once a month)
- When they do, it is usually to relax at the end of the day
- However, when they do drink wine in restaurants, they would treat themselves to wine in the medium price brackets
- They are low-to-medium spenders

Top wine buying channels

% who have bought wine from the following channels in the past 6 months



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Wine Intelligence, consumers interviews (n=7)

CONTENTS

AT-HOME OCCASIONALS: PROFILE

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

Strong / almost exclusive preference for red wine

Spends little on wine and never drinks in restaurants

Mostly buys wine through supermarkets

Familiar brand, varietal or origin are their top choice of wine

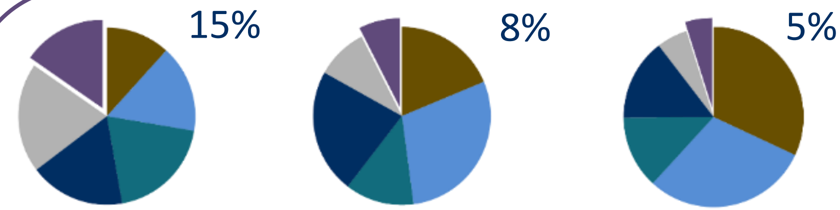
Primarily drink mainstream brands

AT-HOME OCCASIONALS: PROFILE

Older drinkers with low-to-medium income who have less interest in wine

What you need to know

- They are oldest wine drinkers with low-to-medium income
- They are one of the least frequent drinkers in the off-trade with lower spend
- They almost never drink in the on-trade
- They have less knowledge of wine and are not keen on learning more about it
- Similar to Bargain Hunters, they are mature consumers who know what they like already, which makes them less influenced by the trends in the market
- This attitude is also applied to their wine-buying decisions, and they tend to stick to wines they already know



Share of regular wine drinker **population**	Share of total **volume** of wine consumed in Brazil	Share of total **value** of wine consumed in Brazil
15%	8%	5%

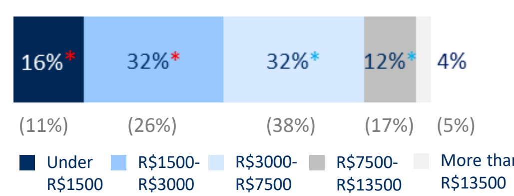
	Volume	Value
Off-trade	11%	9%
On-trade	2%	1%

Who are they?

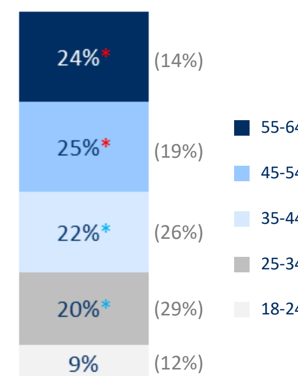
Gender

50% (53%) 50% (47%)

Income



Age



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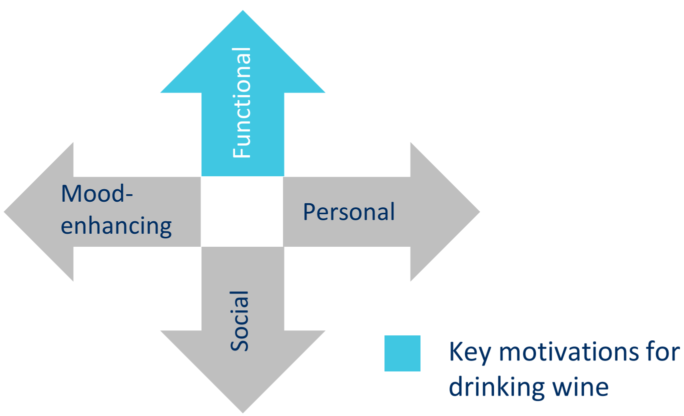
Wine Intelligence, consumers interviews (n=7)

AT-HOME OCCASIONALS: MOTIVATIONS AND WINE ENGAGEMENT

The less frequent and lowest spending wine-drinking segment in the Brazilian market who don't consider wine to be an important part of their lifestyle

Why do they drink wine and how do they engage with wine?

- Compared to other consumer segments, At-Home Occasionals are one of the least involved segment
- Significantly smaller proportion of consumers from this segment say wine plays an important part in their life
- Significantly high percentage of consumers claim they don't know a lot about wine and have little awareness of brands, wine origins, varietals, etc
- They are not keen to learn more about wine. For them, wine is one of the many drinks they have occasionally (e.g. once a month) at home or as a drink out at the end of the day



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Wine Intelligence, consumers interviews (n=7)

AT-HOME OCCASIONALS: WHAT DO THEY DRINK?

At-Home Occasionals have a narrow repertoire and tend to stick to wines they already know

What do they drink?

- At-Home Occasionals prefer red wine significantly more than other drinks, including white and rosé wine
- They have a very narrow repertoire in terms of country of origin, varietals and brands
- The segment tends to stick to the 'traditional' options that they already know

Top 5 alcoholic beverages: Past 6 months

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

Red wine	93% (91%)
Beer	78%* (85%)
White wine	35%* (50%)
Vodka	32%* (49%)
Craft beer	26%* (46%)

Top 5 countries of origin consumed

% who have drunk wine from the following places in the past 6 months

Brazil	72% (71%)
Chile	45% (47%)
Portugal	37%* (44%)
Argentina	27%* (33%)
Italy	16%* (31%)

Brands you might find them drinking

PÉRGOLA

QUINTA do MORGADO

VINÍCOLA SALTON

SANTA HELENA

Sangue de Boi

RESERVADO CONCHA Y TORO

( ) All Brazilian regular wine drinkers

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Wine Intelligence, consumers interviews (n=7)

AT-HOME OCCASIONALS: OFF-TRADE AND ON-TRADE

They almost never drink wine in restaurants. At home occasions will predominantly be informal, with wines purchased in supermarkets

Wine in the off-trade

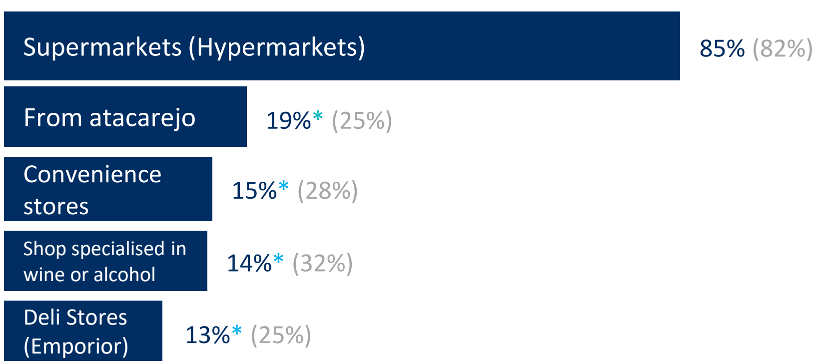
- Less frequent drinkers in the off-trade and one of the lowest spending groups
- Drinks wine in the off-trade around once a month
- Buys wine mostly from supermarkets which is the perhaps the most convenient option for them
- Brand is the most important factor for them when choosing which wine to buy

Wine in the on-trade

- Very rarely / almost never drinks in the on-trade across all wine occasions

Top wine buying channels

% who have bought wine from the following channels in the past 6 months



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CONTENTS

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

RESEARCH METHODOLOGY: QUALITATIVE

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

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 Australian market is deciding who the target consumers are. Wine companies have used Australian 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 Australian 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 Australian 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.

Wine Intelligence Ltd Terms and Conditions of Licence for Syndicated Research Products – key sections

Definitions and Interpretation

The "Agreement" means the Agreement between Wine Intelligence Ltd and the Customer to provide a Licence for the use of the Syndicated Research Report(s) for Fees on these terms and conditions of business and as set out in a Proposal and the Acceptance of Proposal

"WI" is Wine Intelligence Ltd, trading as Wine Intelligence.

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"Licence" means the Customer's right to use, store, retrieve and disseminate the Syndicated Research Report(s), as defined by the Agreement

"Acceptance of Proposal" means the document provided by the Customer to WI confirming the terms of engagement of WI to provide the Customer with the Licence for the use of the Syndicated Research Report(s)

"Fees" means the fees payable by the Customer to WI, as set out in the Contract, plus VAT at the current rate, subject to exemptions as set out in UK and EU law

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1. Engagement

The Customer engages WI to provide the Syndicated Research Report(s), and WI agrees to do so upon the terms of the Agreement for payment of the Fees.

The Fees for the Syndicated Research Reports shall be priced in Pounds Sterling. WI will publish indicative prices in Euros, US Dollars, Australian Dollars, Canadian Dollars from time to time, and the Customer will have the opportunity to pay for Syndicated Research Reports using these currencies. Should the Customer opt for this form of payment the exact amount payable will be based on the prevailing exchange rate at the time of the execution of the Agreement.

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