WINE INTELLIGENCE

PORTUGAL PORTRAITS 2021

OCTOBER 2021

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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.

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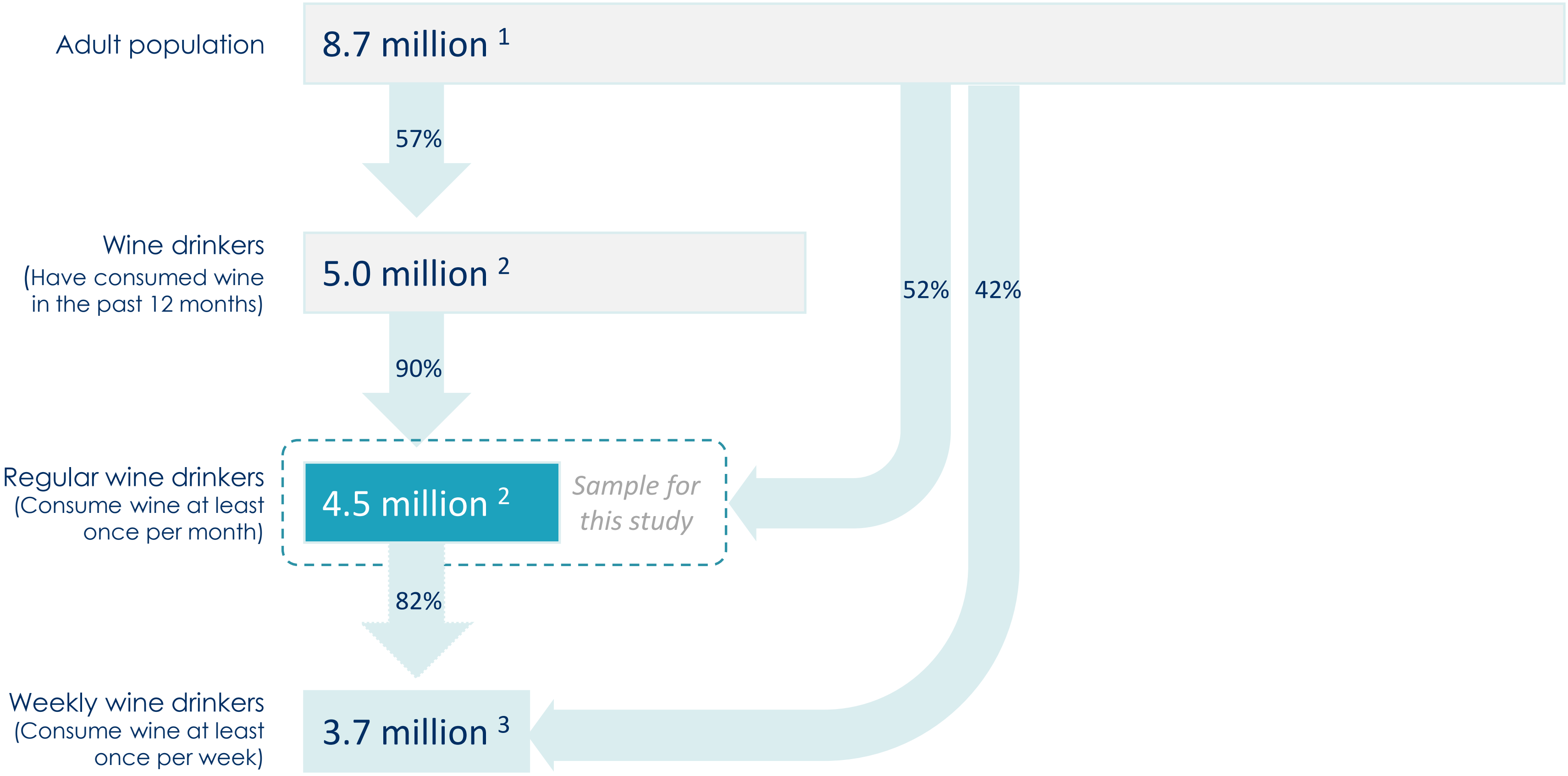
OVERVIEW OF REGULAR WINE DRINKERS IN THE PORTUGUESE MARKET

Over four in ten Portuguese adults drink wine at least once per week



Adult population

8.7 million [1]

57%

Wine drinkers
(Have consumed wine
in the past 12 months)

5.0 million [2]

90%

Regular wine drinkers
(Consume wine at least
once per month)

4.5 million [2]

Sample for this study

82%

Weekly wine drinkers
(Consume wine at least
once per week)

3.7 million [3]

52%

42%

Sources:

[1] Statistica, Martest and Wine Intelligence estimation

[2] Marktest 2021 (based on study run in 2020)

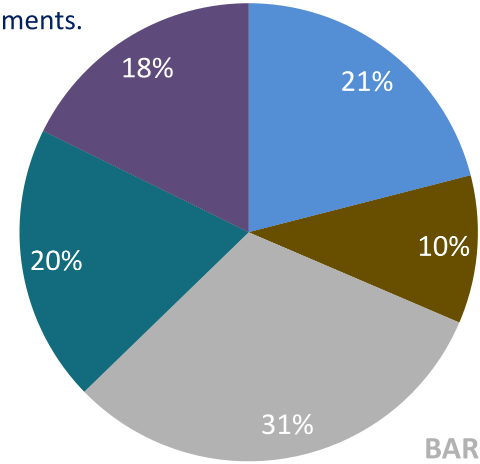
[3] Source: Wine Intelligence, Vinitrac® Portugal, July + October 2020 and March + June 2021, (n=4,100) Portuguese regular wine drinkers

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.



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.

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.

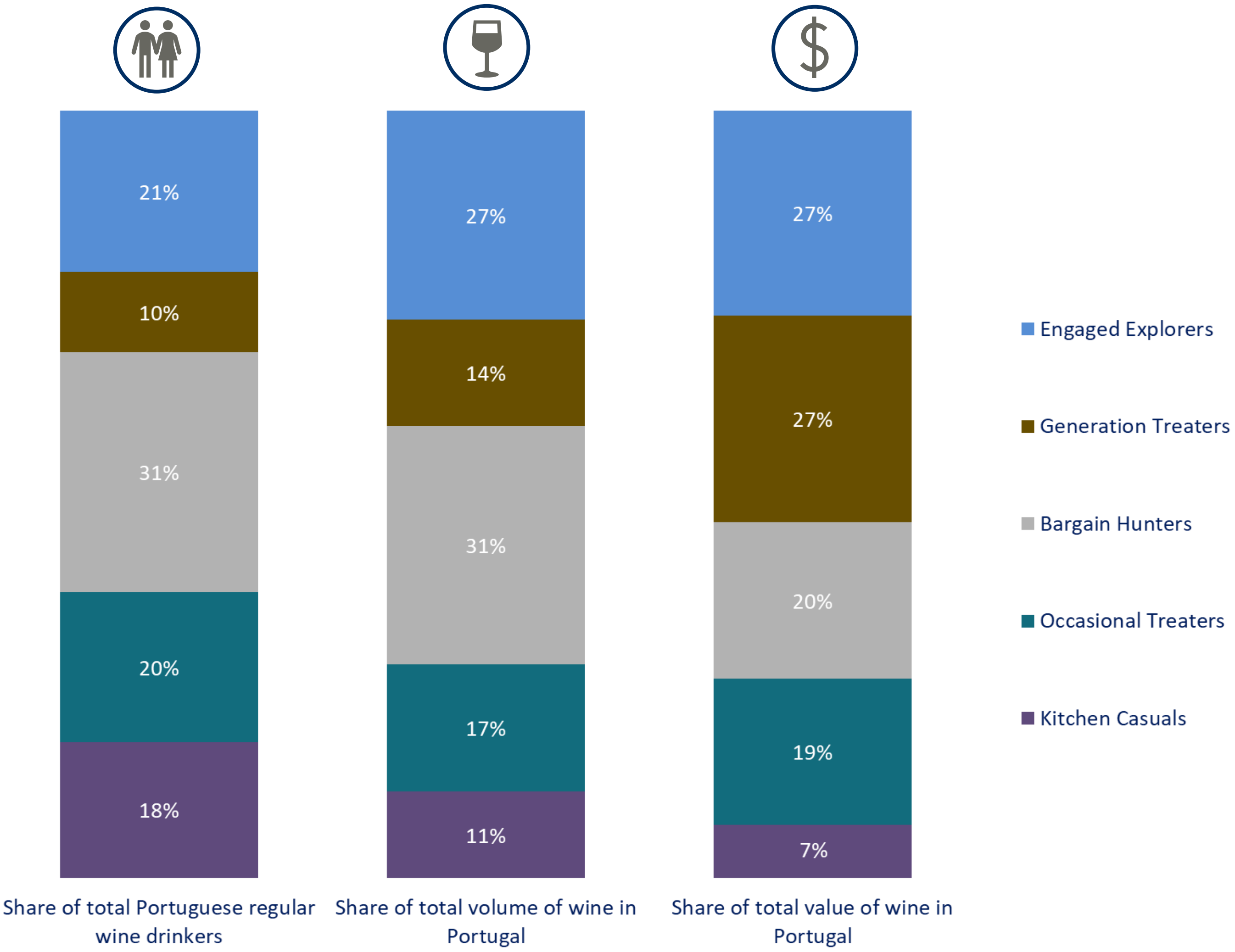
BARGAIN HUNTERS: The largest proportion of the Portuguese population, they are frequent wine drinkers but don't spend very much on their wine purchases, being highly promotion driven. These are your average consumers, behaving most like the average regular wine drinker in Portugal. They are relatively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

PORTUGAL PORTRAITS MARKET SIZING

Population, share of wine volume and share of spend on wine: By Portugal Portraits

Proportion represented by each segment with consumption and spend estimated based on recalled usage frequency and spend data
Base = All Portuguese regular wine drinkers (n=4,100)

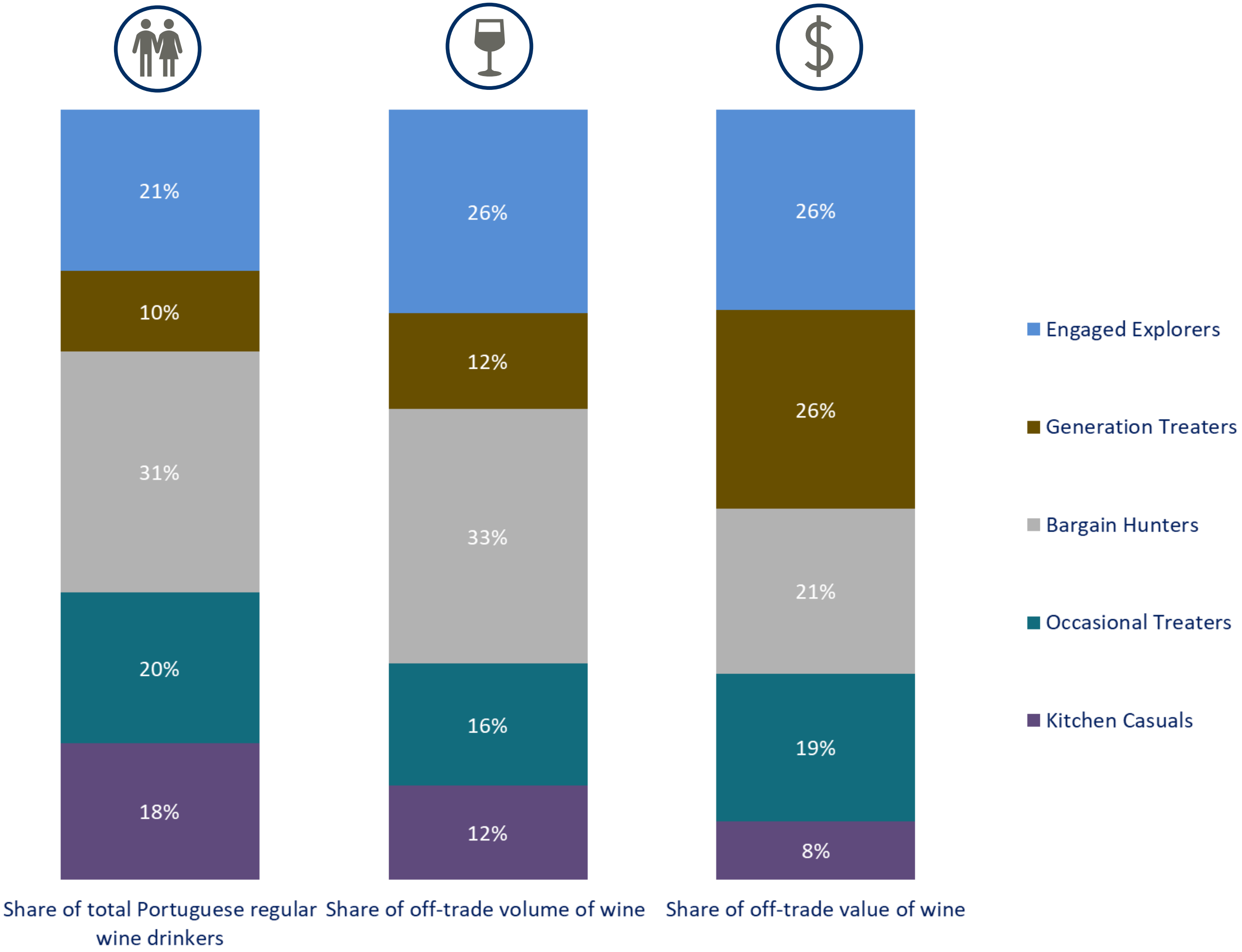


Source: Wine Intelligence, Vinitrac® Portugal, July + October 2020 and March + June 2021, (n=4,100) Portuguese regular wine drinkers

PORTUGAL 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 Portuguese regular wine drinkers (n=4,100)



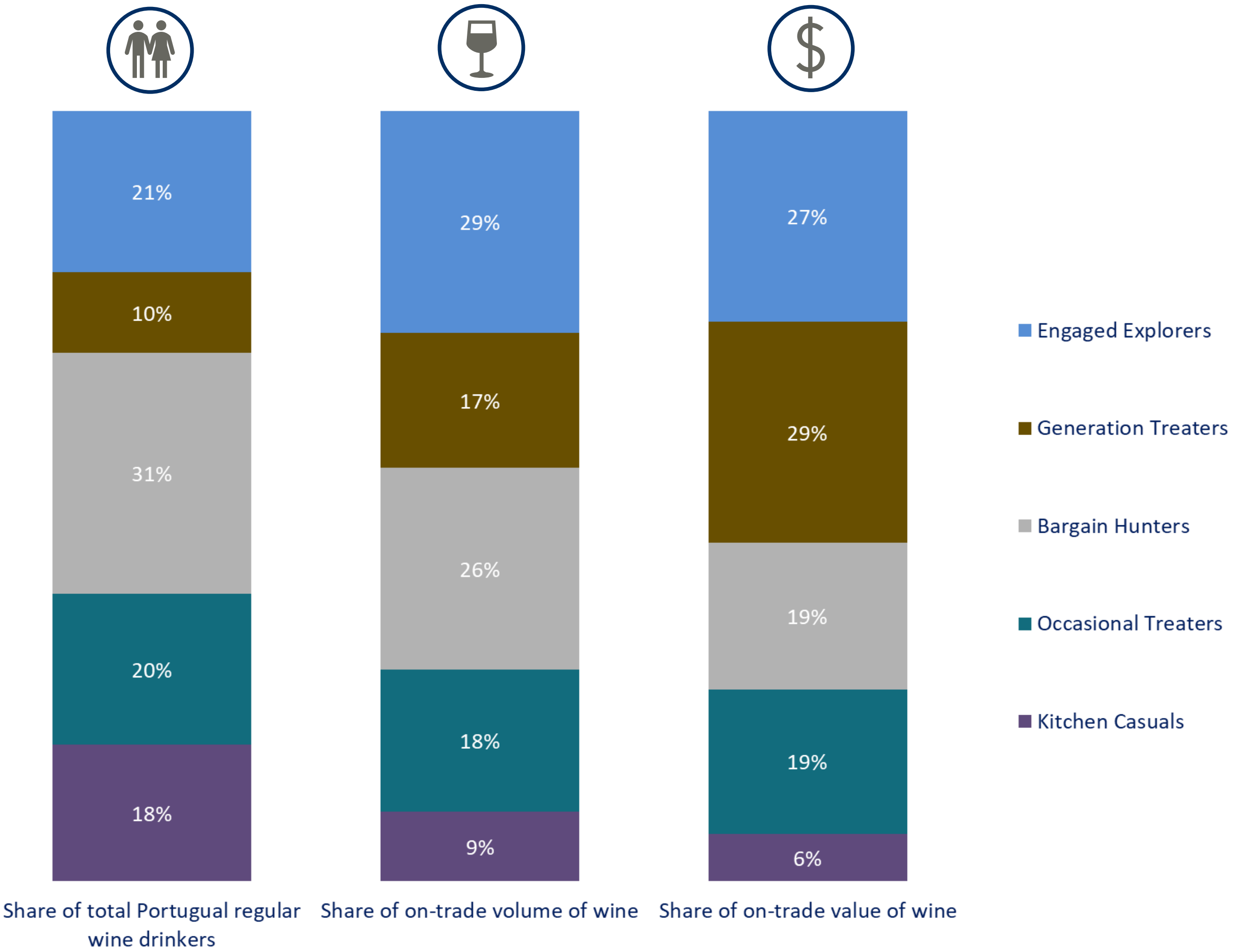
	Share of total Portuguese regular wine drinkers	Share of off-trade volume of wine	Share of off-trade value of wine
Engaged Explorers	21%	26%	26%
Generation Treaters	10%	12%	26%
Bargain Hunters	31%	33%	21%
Occasional Treaters	20%	16%	19%
Kitchen Casuals	18%	12%	8%

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

PORTUGAL PORTRAITS MARKET SIZING: ON-TRADE

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

Proportion represented by each segment with consumption and spend estimated based on recalled usage frequency and spend data
Base = All Portuguese regular wine drinkers (n=4,100)

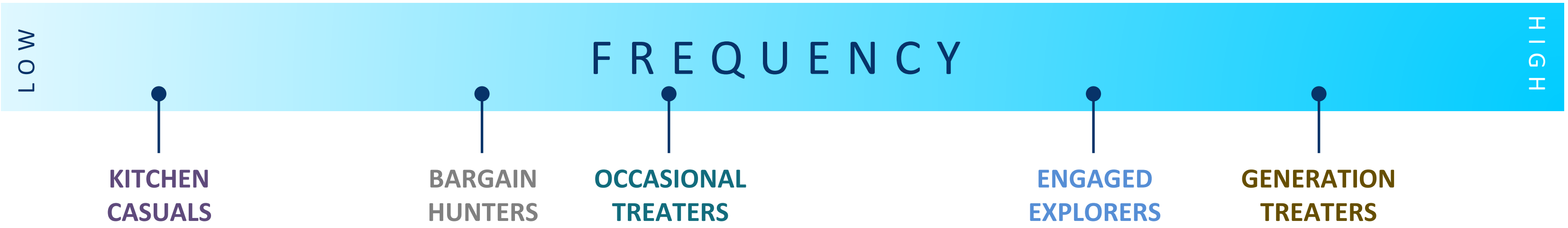


Source: Wine Intelligence, Vinitrac® Portugal, July + October 2020 and March + June 2021, (n=4,100) Portuguese regular wine drinkers

INTRODUCING THE 2021 PORTRAITS GROUPS: WINE CONSUMPTION

Wine consumption frequency (off-trade)

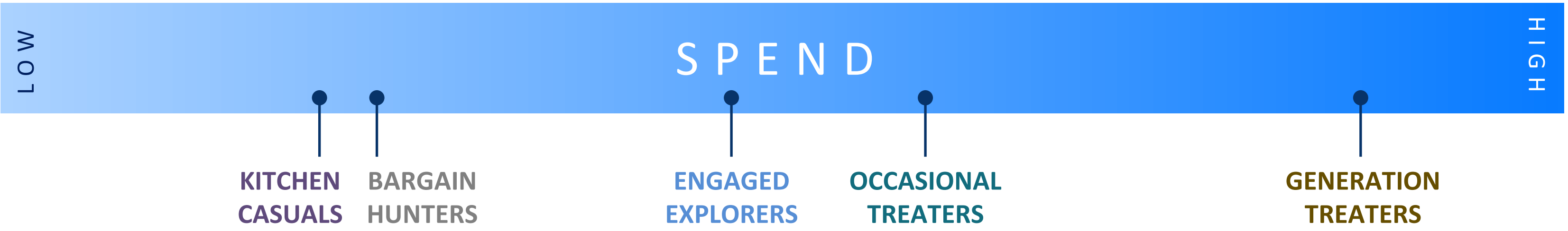
Wine consumption frequency (on-trade)



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

INTRODUCING THE 2021 PORTRAITS GROUPS: SPEND

Typical spend per bottle of wine (off-trade)

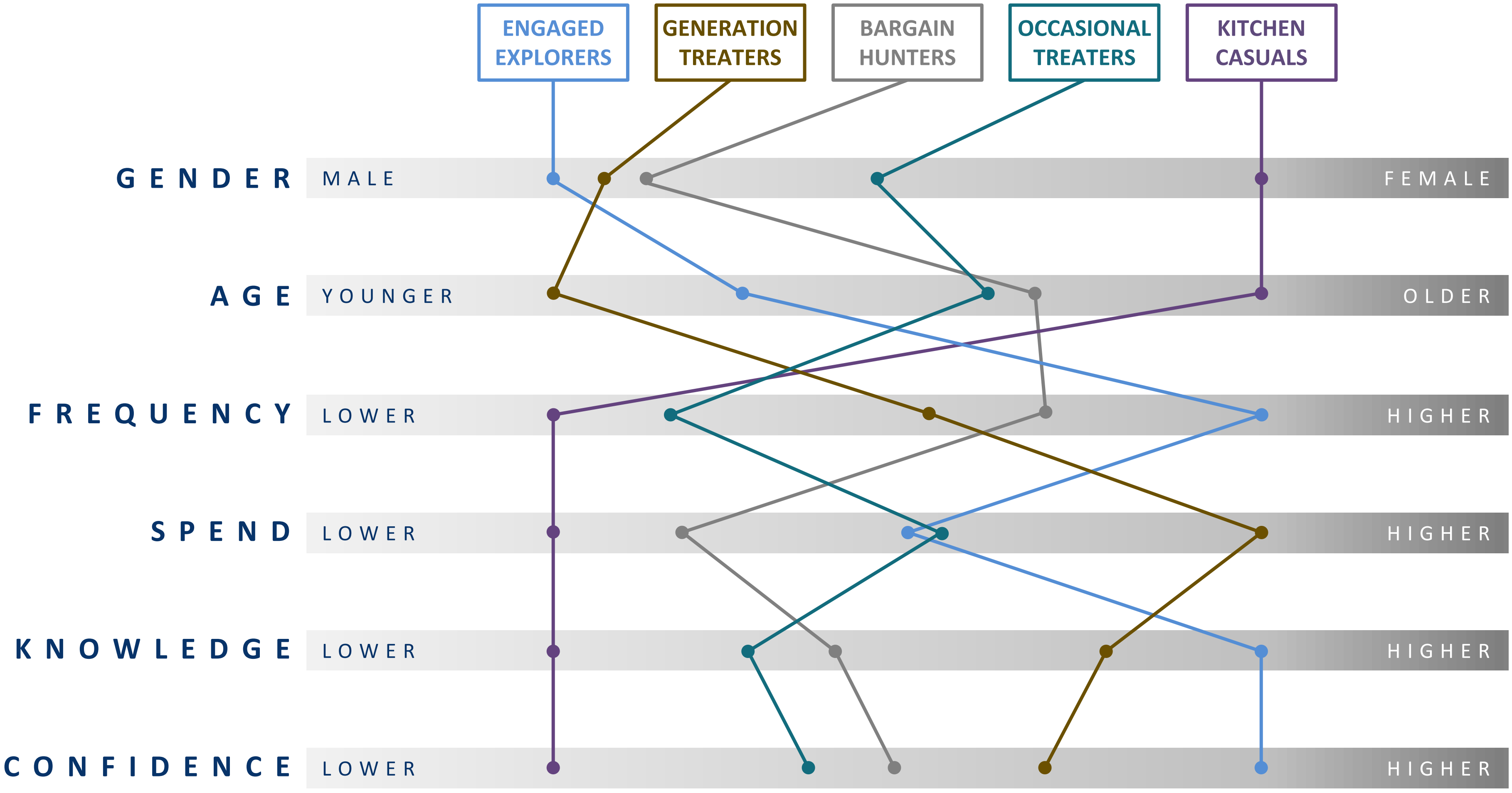


Typical spend per bottle of wine (on-trade)

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

PORTUGAL PORTRAITS KEY DESCRIPTORS

Overview of Portugal Portraits



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

PORTUGAL PORTRAITS 2021 OVERVIEW: KEY SEGMENT ATTRIBUTES

	Engaged Explorers	Generation Treaters	Bargain Hunters	Occasional Treaters	Kitchen Casuals
Who are they?	Male, medium income, middle-aged wine drinkers who drink frequently and are very knowledgeable and confident in the category as a result of an eagerness to try new things	Millennials who are likely to be well-educated and have above-average disposable incomes. The segment with the highest proportion of Lisbon residents and most likely to live with a partner and children	Average Portuguese wine consumers, typically 55+ Boomers with low-to-medium incomes. They have high category knowledge but average confidence	Middle-aged to older consumers with higher incomes and below average wine category knowledge and confidence	The oldest segment, lower-income, 'Empty Nesters', only drinking wine at home and rarely drinking in the on-trade
Why do they drink wine?	They are adventurous and enjoy the experiences that come with discovering new wines and expanding their portfolios	Wine is seen as a sophisticated choice for their social occasions and will showcase their personal taste and social status	Wine is frequently drunk with meals in both casual or more formal occasions, likely with family and friends	Wine is seen as a special treat to enjoy a few times per month at celebrations or special dinners, both in the off-trade and on-trade	Generally drink wine to accompany meals at home
Where do they shop for wine?	They have the broadest range of shopping channels of all consumers, which extends to online purchases	Though they do occasionally shop for wine in supermarkets, they prefer to shop in specialist stores where they can interact with and receive recommendations from shop staff	Supermarkets are their dominant wine-buying channel as they offer the best value and convenience	Mostly buy wine from large supermarkets, where value, quality and variety are ensured	Shop at supermarkets, buying wine with their weekly grocery shops
What type of wine do they buy?	Have a broad wine repertoire of varietals, regions and brands, with a good mixture of both mainstream and niche brands in their portfolios	One of the broadest repertoires of all segments, this group drinks most wine types and styles. They prefer lesser-known regions and brands	Open to buying any type, style or origin of wine, as long as it's in their price range	Mainly buy premium types of mainstream brands but are also open to exploring lesser-known types of wine	They are influenced by what's on promotion and stick to known brands when selecting wine

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ENGAGED EXPLORERS

WHO IS THE TYPICAL EE?

- **Male, medium income, middle-aged** wine drinkers who drink frequently and are very knowledgeable and confident in the category as a result of an eagerness to try new things

INTERESTS AND VALUES

- **Exploration** – trying new things and using the wine category to create new experiences
- Staying on trend and supporting social causes, **being inclusive and seen to do the 'right thing'**
- Making mindful and intentional purchases

RELATIONSHIP WITH WINE

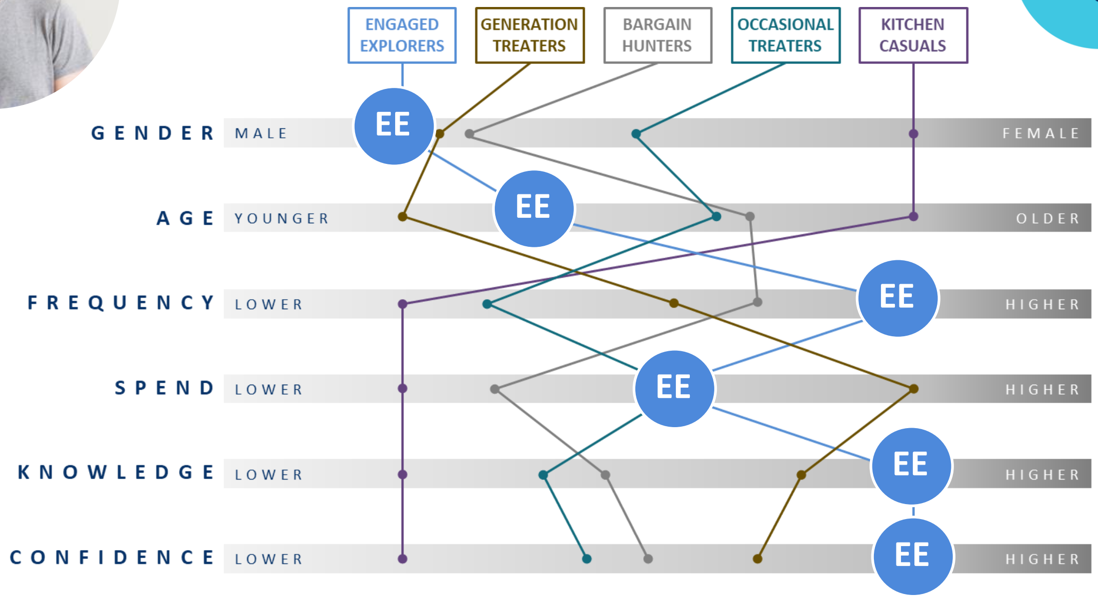
- **Adventurous** – they enjoy the pleasure of discovering new wines and expanding their portfolios
- **Confident** – they have the highest wine knowledge and confidence levels of all segments and are heavily engaged in the category
- **Frequent drinkers** with wine being their go-to drink in almost all occasions
- **Value-oriented, medium spenders**, they understand higher prices don't necessarily translate into better quality for wine

HOW TO ENGAGE THEM WITH WINE

- **Promotions** – bulk discounts, loyalty schemes
- **Social media** – influencers, producers, critic accounts
- **On-trade** – they seek out wine that will complement their meal

KEY CHALLENGE FOR WINE BRANDS

- **Building loyalty & staying interesting.** They enjoy exploring new wines and may forget something they tried and loved - unless they are able to make a personal connection with it



WHERE YOU MIGHT FIND THEM BUYING

Estado D'Alma Garrafeira

continente

garrafeira nacional

local Independent wine stores

WHAT YOU MIGHT FIND THEM DRINKING

TONS

ESPORÃO

QUINTA DO CARMO

CATARINA

MULA VELHA

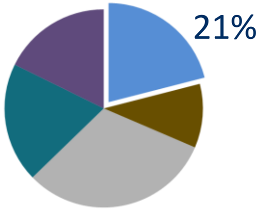
Dom MARTINHO

Typical Engaged Explorer behaviour

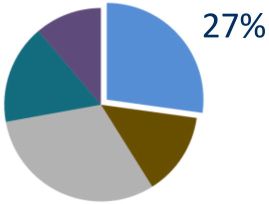
- ✓ Off-trade spend starts from €4 for everyday wine, with occasional more expensive purchases up to around €10
- ✓ Have a good collection of wine at home – a mixture of mainstream brands and special bottles
- ✓ Have explored the category through travel, whether with vineyard visits, trying new varietals when abroad or having family or friends that produce wine
- ✓ Will have reliable go-to brands, but are always on the lookout for a new favourite
- ✓ Shop both on and off-line to discover new wine styles

ENGAGED EXPLORERS: PROPORTION OF WINE DRINKERS, VOLUME AND SPEND ON WINE

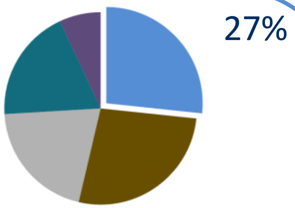
Engaged Explorers are the **most frequent wine drinking consumers** in Portugal, especially in the off-trade, and **spend slightly more** than the average Portuguese consumer. They account for a **fifth of the total wine drinking population** in Portugal, but **hold over a quarter of the share of total volume and spend** on wine.



Share of regular wine drinkers **population**



Share of total **volume** of wine sold in Portugal

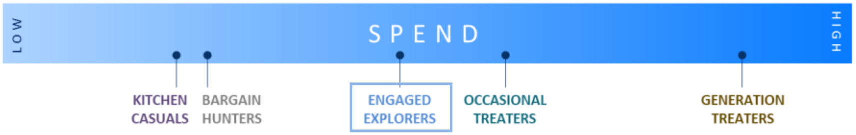


Share of total **spend** on wine in the Portugal

Off-trade	26%	26%
On-trade	29%	27%

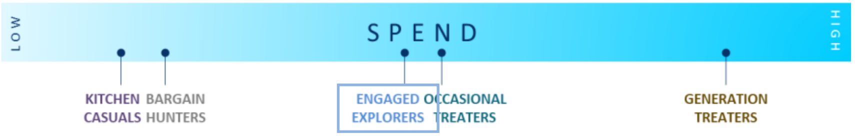
Wine consumption frequency (off-trade)

Typical spend per bottle of wine (off-trade)



Wine consumption frequency (on-trade)

Typical spend per bottle of wine (on-trade)



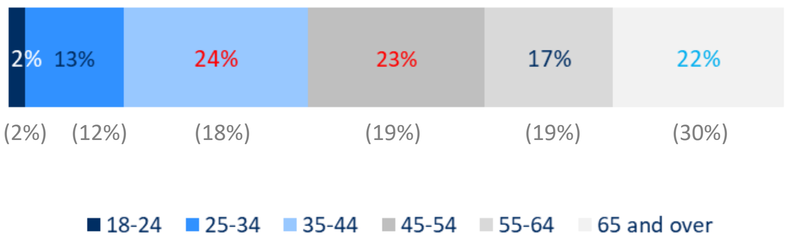
Source: Wine Intelligence, Vinitrac® Portugal, July 2020, October 2020, March 2021 and June 2021 (n=4,100) Portuguese regular wine drinkers

ENGAGED EXPLORERS: WHO ARE THEY?

Who are Engaged Explorers?

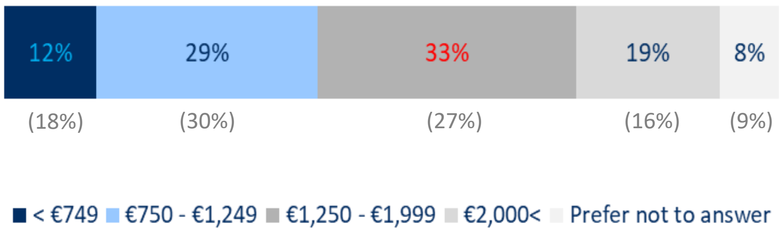
- **Strong male bias** (60% vs 53%), highest proportion of men out of all segments
- Second-youngest segment, with **half aged between 35 and 54**
- **High monthly personal income** relative to other segments
- Similar geographic distribution when compared with all Portuguese regular wine drinkers
- The segment **most knowledgeable** about the wine category and the **most confident** in what they do know
- Most involved with and adventurous in the wine category compared with other segments

Age

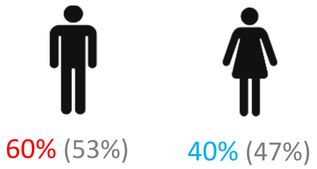


Income

(Monthly personal income after taxes)



Gender



(%): All Portuguese RWD

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

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

ENGAGED EXPLORERS: VALUES, ATTITUDES & INTERESTS

Worldly, experienced, educated – and into travelling, finance, the environment and politics

What's important to them?

- **Generally similar** to the average Portuguese regular wine drinker in terms of attitudes
- **Over-index in terms of global interests** such as travelling, politics, finance and environmental causes, a global trend seen amongst younger consumers
- Value **spending time with family and friends**, and wine provides a relaxed and comfortable setting to do so

What are their interests?

% who stated they are interested in each of the following subjects

Travel
81% (68%)

Spending time outdoors
78% (72%)

Movies or TV shows
72% (68%)

Environmental and sustainable causes
60% (52%)

Participating in sport or fitness
53% (31%)

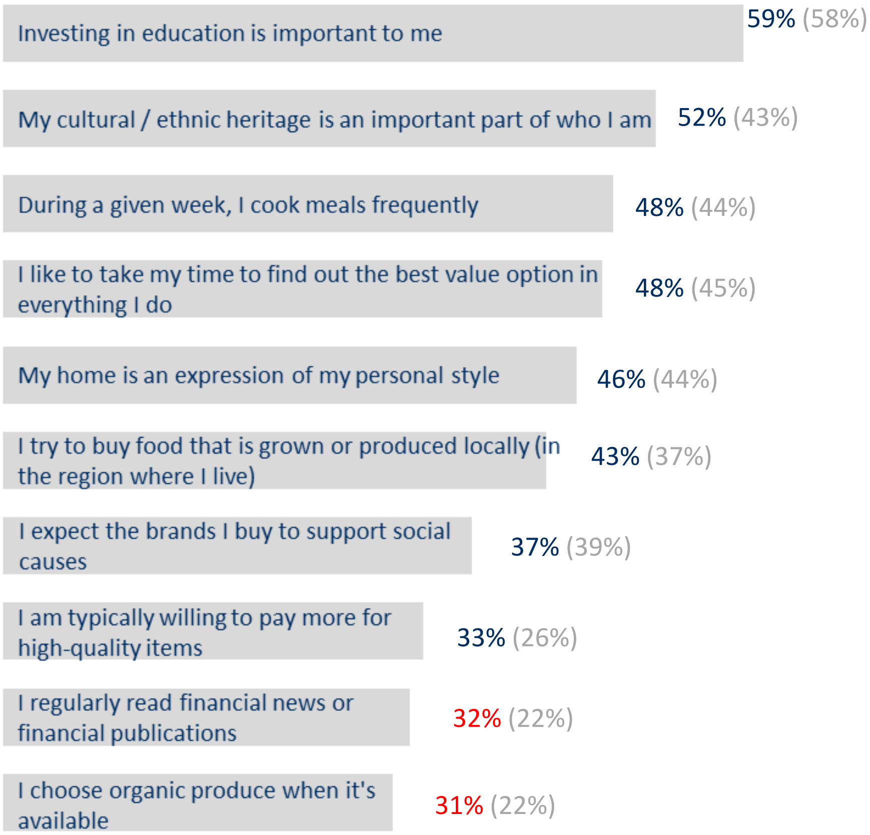
Finance / Investments
47% (36%)

Politics
46% (35%)

Fashion
34% (26%)

What are their attitudes?

% who 'agree' or 'strongly agree' with each statement



(%): All Portuguese RWD
% / % Statistically significantly higher / lower than all Portuguese regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Portugal, July 2020, (n=2,003) UK regular wine drinkers
Wine Intelligence, consumer interviews

ENGAGED EXPLORERS: MOTIVATIONS FOR DRINKING WINE

Most frequent wine drinking segment who drink wine for all occasions, most have a personal connection to the wine category through family or friends

Why do they drink wine?

- **Engaged Explorers most often drink wine to accompany meals** both in and out of the home. Additionally, **wine is used as a social drink** when entertaining friends or dining out, but also as **a means of relaxing** during lunch break or at the end of the day.
- **Many of them have personal connections with the wine categor**y, as many consumers do in Portugal. Engaged Explorers **grew up in families that valued wine**, whether they saw their grandparents drink it from a young age or have family or friends that own vineyards. From these personal experiences, **drinking wine has become a bit of a hobby to them** and often reminds them of fond memories from growing up.
- **Red wine remains their drink of choice** though they are adventurous in the beverages they consume. **They are regular and habitual wine drinkers.**
- They **enjoy exploring the wine category**. Part of the pleasure comes with **trying out new drinks and being knowledgeable**. As a result of their knowledge, they know they can find high quality Portuguese wine at lower prices.

> "I drink wine about four times per week. I can drink in any situation really."
> *Engaged Explorer, Male*

> "If I go to a restaurant, I'll say wine is my go-to drink, especially for dinner. For lunch, if I'm working, I will probably stay with a beer. I will even drink it in a club when I go out if there is a kind that I like. Wine is always present in my life."
> *Engaged Explorer, Male*

> "I don't drink wine only when I have dinner out, I also have it at home. Sometimes if I go for like a drink after work, I can drink a glass of wine or share a bottle with someone."
> *Engaged Explorer, Male*

> "I drink wine when I'm dining out or having dinner at home. Sometimes when I watch a movie or I go to a friend's house and we drink wine. It's a very sociable thing."
> *Engaged Explorer, Female*

> "I grew up seeing my grandfather drink wine."
> *Engaged Explorer, Female*

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

ENGAGED EXPLORERS: WINE ENGAGEMENT

Wine is both an everyday drink and a treat for Engaged Explorers; they use it to complement meals, enhance social situations, and to relax

How do they engage with wine?

- **Engaged Explorers** use wine as both an **everyday drink** and **treat**. Wine is predominantly used to **complement a meal** (both at home and out at restaurants) but is also used as a **means of relaxing at lunch or after work**.
- They are **always looking to add to the list of wines that they know and enjoy** but keep some wines from mainstream brands and regions in their repertoires.
- They love **taking their time** when they are going to buy wine, **pausing to read back labels** and really **getting to know different** wines before they decide which to buy.
- **Lower spend than expected** for such a knowledgeable and involved group, but this is because they know the value that can come from a lower priced bottle of domestic wine.

> "I really like pairing wine with food. I know that some wines are really good also without any food, but I would say the majority of them are better when paired with food."
> *Engaged Explorer, Male*

> "My main criteria when choosing wine is the mood I'm in that day, what I want to taste, what I want to experience. If I'm feeling a bit more bold, I will try something new. Or if I want to drink a wine that I already know will be good, I'll have that."
> *Engaged Explorer, Female*

What influences their choices?

- As knowledgeable, confident and experienced drinkers, their choice of wines is **predominantly based on regions / varietals they know** and then options within those criteria.
- Also dependent on the **situation / person they're buying for.**
- **Value** – wines which will tick both their taste and price preferences.

> "I first go to the regions I know already I like, then I pick a bottle out of the ones I don't know to read a bit more about. When you read it, you can understand if the wine is the one you identify with."
> *Engaged Explorer, Male*

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

ENGAGED EXPLORERS: ALCOHOL REPERTOIRE AND WINE ORIGINS

Drink from a wide variety of beverages, though wine remains their top choice, especially from lesser-known regions and varietals

What do they drink?

- Their adventurous attitude and high knowledge level extends to the range of alcoholic beverages they drink; **over-indexing in terms of consumption of most beverages, regions of origin and varietals**.
- In addition to various wine types, **higher proportions of them drink beer and spirits** compared with all Portuguese consumers.
- Reflecting their explorative attitude towards wine, **they over-index on the consumption of many red and white varietals**.
- They are **more likely to drink wine from many different Portuguese regions**, but especially look to buy wine from lesser-known ones.

> "There from the coast of Alentejo, and you can really taste the difference between wines from the inner Alentejo and wines from the shore."
> *Engaged Explorer, Male*

> "I prefer buying from less well-known regions, such as Bairrada or Dao instead of Douro and Alentejo. I think in these small regions the terroir of the wines clearer."
> *Engaged Explorer, Male*

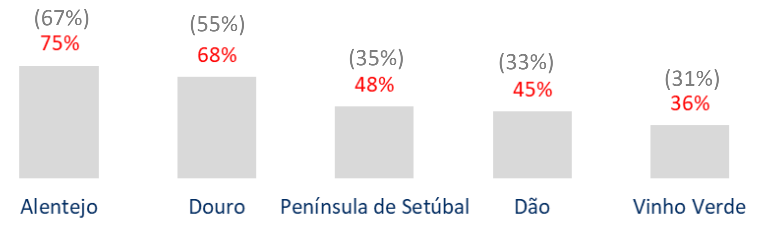
Top 5 alcoholic beverages: Past 12 months

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

Red Wine	Beer	White Wine	Port Wine	Portuguese sparkling wine
95% (87%)	88% (80%)	87% (82%)	71% (57%)	56% (42%)

Region of origin purchase: Top 5

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



(%): All Portuguese RWD

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Wine Intelligence, consumer interviews

ENGAGED EXPLORERS: WHERE THEY BUY WINE

Supermarket shoppers for everyday wine, whilst turning to specialist retailers and wineries for discovery

Where do they buy wine?

- **Supermarkets are where wine is most often bought**, likely to be part of a regular grocery purchase.
- Engaged Explorers also look at **specialised stores / garrafeiras or directly from wineries** for wine for special occasions.
- They are also **more likely to source wine from online channels** than the average wine drinker, though tend to only do so if they are buying wine they're already familiar with. **They'd prefer to make purchases in store where they have recommendations from staff**.

Places you might find them buying wine

CONTINENTE

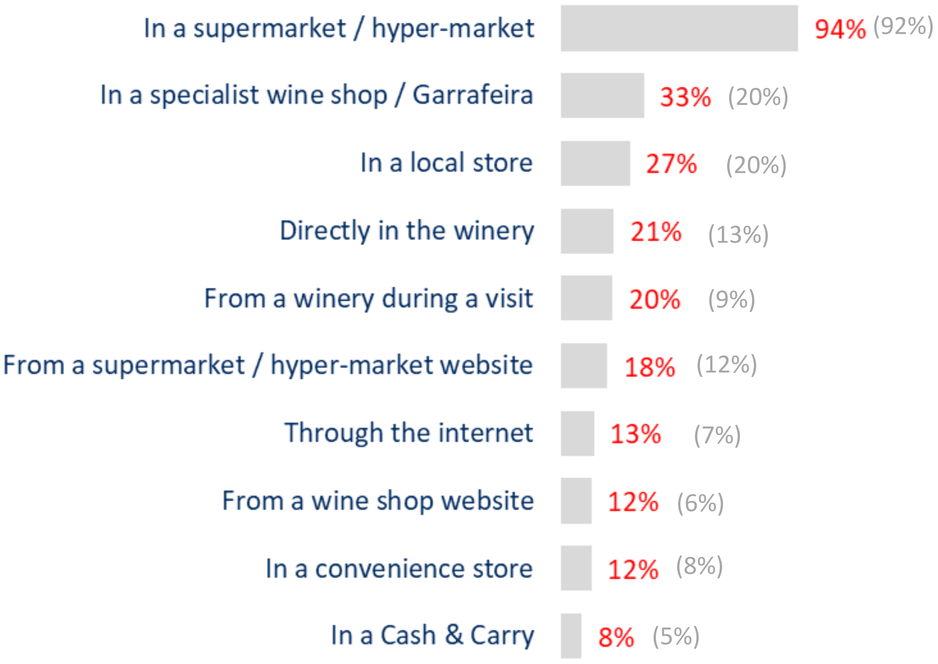
Estado D'Alma
· Garrafeira ·

Garrafeira Nacional

local Independent wine stores

Top 10 wine buying channels

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



In a supermarket / hyper-market	94%	(92%)
In a specialist wine shop / Garrafeira	33%	(20%)
In a local store	27%	(20%)
Directly in the winery	21%	(13%)
From a winery during a visit	20%	(9%)
From a supermarket / hyper-market website	18%	(12%)
Through the internet	13%	(7%)
From a wine shop website	12%	(6%)
In a convenience store	12%	(8%)
In a Cash & Carry	8%	(5%)

> "I buy wine online, but I have to know the wine when I do because sometimes I can't tell if I will like it or not. You don't have the opinion of the salesmen online."
> *Engaged Explorer, Male*

(%): All Portuguese RWD
% / % Statistically significantly higher / lower than all Portuguese regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Portugal, July 2020, October 2020, March 2021 and June 2021 (n=4,100) Portuguese regular wine drinkers
Wine Intelligence, consumer interviews

ENGAGED EXPLORERS: HOW DO THEY SHOP FOR WINE?

Controlled exploration drives their wine-buying choices; they start with a cue they know will provide quality and choose a wine they don't know within that

How do they shop in the off-trade?

- **They begin their wine search with one cue they know they will like, such as style or region of origin.** After this, they often choose a wine they have not heard of before within that criteria.
- **Occasion / company also determines what will be purchased**; it will be a nicer bottle for a special occasion or to drink with a friend that is also knowledgeable about wine.
- They are also open to **recommendations by anyone,** including friends, family, shop staff, or critics they follow on Instagram.
- Often buy from **family / friends** that produce wine.
- Label isn't the most important cue to them, but **they're more likely to grab a bottle with an appealing label** (within their initially set criteria).
- **Promotion-driven**, with a focus on getting a good bottle at a good price. High levels of knowledge and confidence mean they don't see expensive as synonymous with quality and get a sense of achievement from finding a wine they enjoy at a discounted price.

% who say each of the following are 'important' or 'very important' when buying wine	Engaged Exlporers	RWD
n=	861	4,100
A brand I am aware of	94%	89%
The region of origin	94%	87%
The price	91%	89%
Grape variety (eg Touriga Nacional, Alvarinho, etc)	90%	73%
A winery / wine group I am aware of	88%	79%
Recommendation by friend or family	83%	77%
Promotional offer (eg price discount or 3 for the price of 2)	76%	72%
Taste or wine style descriptions on wine lables / shelves	71%	58%
The wine has food matching indications	69%	56%
Recommendation by wine guide books / wine critic or writer	67%	51%
Alcohol content	66%	61%
An oenologist I am aware of	63%	45%
Whether or not the wine has won a medal or award	61%	48%
Appeal of the bottle and / or label design	45%	34%
The wines recommended by shop staff or shop leaflets	45%	38%
Whether or not the wine is organic	40%	35%
The wine is from near where I am from	30%	25%

> "The criteria is how I'm feeling that day, what I want to taste, what I want to experience. If I'm feeling a bit more bold and try something new, or if I want something I know will be good. Then I look at the labels to see what the wine is, where it's made, the type of grapes, and price."
> *Engaged Explorer, Male*

> "I almost always buy based on variety and region. Because some of them are too acidic, like the ones from Alentejo. I don't feel that with the ones from Douro."
> *Engaged Explorer, Female*

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

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

ENGAGED EXPLORERS: HOW DO THEY ENGAGE IN THE ON-TRADE?

Frequent on-trade drinkers who buy based on what they're familiar with, as long as it's not too expensive

Wine in the on-trade

- Wine is their **drink of choice in on-trade settings,** e.g. lunch breaks at restaurants, more formal dinners out of the home.
- They also often consume wine as a **relaxing drink at the end of the day** in bars / pubs.
- **They know their way around a wine list** and are confident ordering without help from staff. **They utilise the same decision-making process as they do for off-trade wine buying**, where they begin with style or region and choose from the options available.
- If they are unfamiliar with what's on a wine list or their favourite isn't available, **they will reach out to waitstaff**, tell them what they generally like, and go off their recommendation.
- They know wine is upsold in restaurants so **will stay away from the most expensive offerings**, even if it's something they like.
- **In-house specialities also come into play**; if a restaurant is well-known for one type of drink, whether it be wine or not, they will likely order that.

"Normally in restaurants, I try to choose wines that I already know. If the menu doesn't have any. I'll ask staff for recommendations. Here in Portugal, restaurant prices are at least three times the actual value of the bottle. So price is always something that I consider, too."
Engaged Explorer, Female

"I will go by region when buying wine in a restaurant, then see if there is one I know and like. Sometimes I'll ask the sommelier for some tips; I'll tell him what I like and ask him to recommend something similar."
Engaged Explorer, Male

"I start with grape or region, but if the only wine on the menu from a region I like is the most expense, I won't buy it. Instead I'll ask for something similar."
Engaged Explorer, Female

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

ENGAGED EXPLORERS: WHICH WINE BRANDS DO THEY BUY?

Are not brand-loyal apart from a few they have connections with; tend to buy different wines from their favourite region or style

What is their attitude towards brands?

- They have **go-to mainstream brands** for their regular casual drink which they buy from supermarkets, most likely whilst grocery shopping. They learned about these brands though their friends or family, who likely own them.
- They are **keen to explore**, and will follow recommendations for new brands in their social circles. These become favourites until something new is discovered.
- Though price being a key factor when deciding purchases, their **brand portfolio ranges both from mainstream to more premium brands**, anything that they believe is good value.

Wine from an Engaged Explorer's home

Brands you might find them drinking

ESPORÃO

CATARINA

MULA VELHA

PAPA FIGOS

Trinca Bolotas

TONS DE

QUINTA DO CARMO

Dom MARTINHO

QUINTA DO PINTO

(%): All Portuguese RWD

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

ENGAGED EXPLORERS: ALTERNATIVE WINES

They are interested in alternative wines and some drink them because they're "trendy; understanding about what exactly they are, however, is low

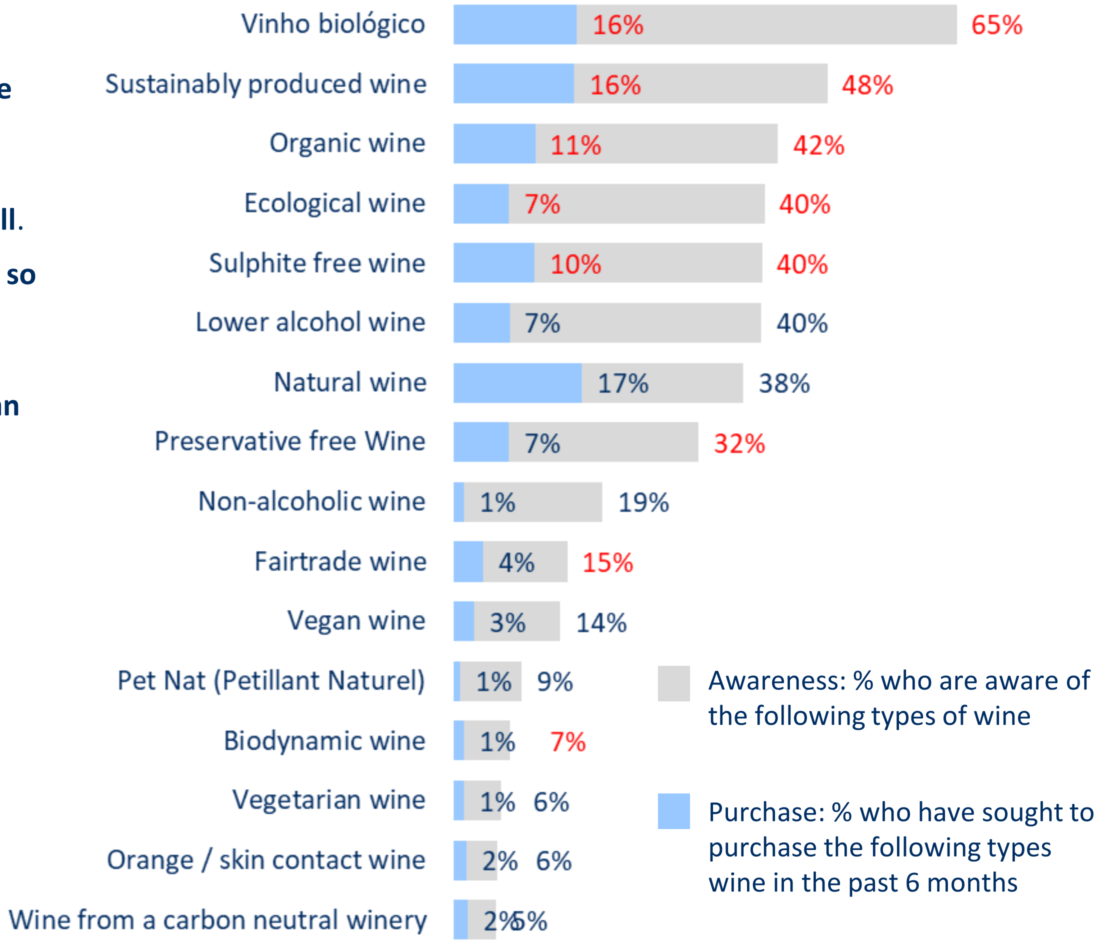
What do they think about alternative wines?

- Consistent with their attitudes and values, the segment has **better awareness of alternative wine types** compared with all Portuguese consumers.
- Though some **Engaged Explorers** purchase these alternative wine types, **this is still fairly low overall**.
- Of those who do by the alternative types, **they do so because they've heard buzz about them** from others and **drinking them is seen as trendy**.
- **Still confusion about what exactly the terms mean** regarding wine.

> "We drink Pet Nat, but because it's a trend. It's fashionable because people talk about it and I was curious, so I tried it."
> *Engaged Explorer, Female*

> "Biodynamic and organic are the same thing, right?"
> *Engaged Explorer, Male*

Awareness and purchase of alternative wines



% / % Statistically significantly higher / lower than all Portuguese regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Portugal, July 2020, (n=2,003) UK regular wine drinkers
Wine Intelligence, consumer interviews

ENGAGED EXPLORERS: ALTERNATIVE WINE PACKAGING FORMATS

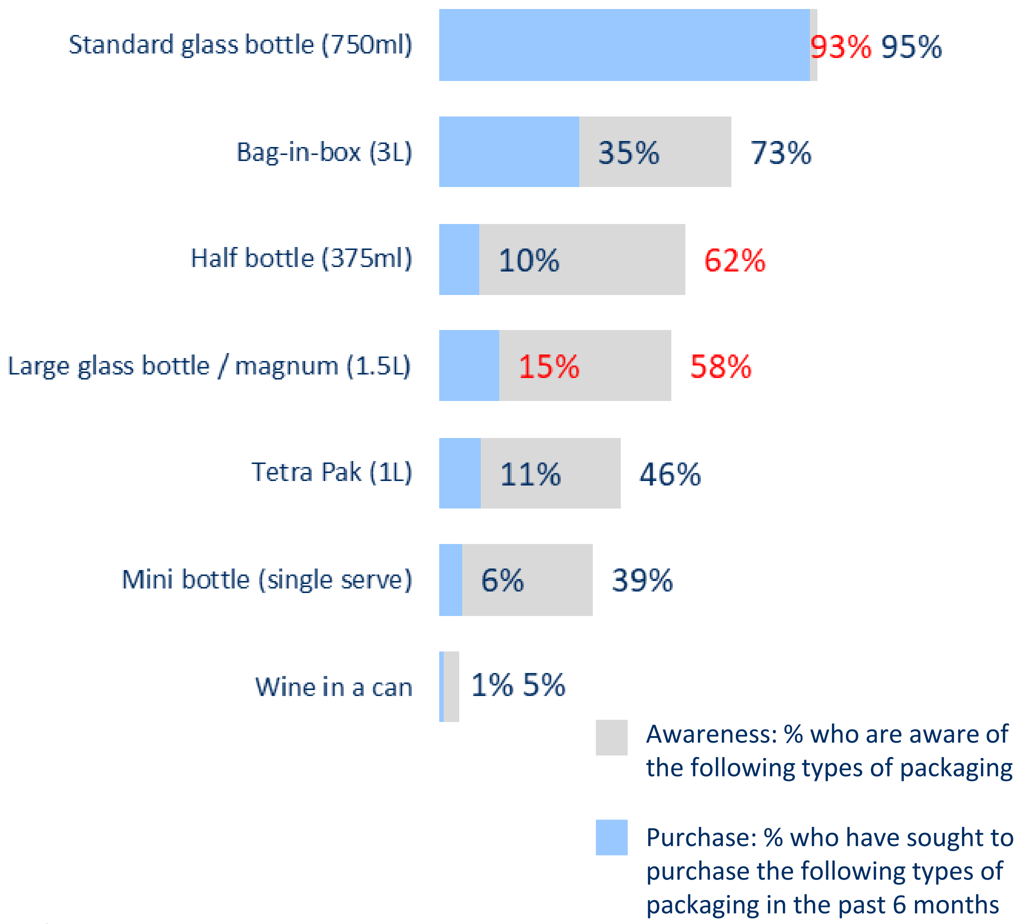
Alternative packaging types are well-known amongst Engaged Explorers, but they are unlikely to be used outside of special / niche occasions

What do they think about alternative packaging formats?

- In line with their level of wine knowledge, Engaged Explorers have **high levels of awareness of alternative packaging types.**
- In line with this high awareness, **many have purchased some alternative types**, especially magnums and bag-in-boxes.
- **Magnums are typically only purchased for gifting** or very special occasions where a lot of wine will be drunk.
- Some appreciate bag-in-boxes for containing a large amount of quality wine, but **they just don't want so much volume of one wine** because they want to try different types.
- Wine in a cans are nearly unheard of, but consumers aren't sure they'd try it as **they like the experience of popping a cork off a wine bottle.**

> "My family told me about a bag-in-box. It's good if you have a huge dinner, especially because they're usually good enough wines."
> *Engaged Explorer, Female*

Awareness and purchase of alternative packaging formats



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Wine Intelligence, consumer interviews

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GENERATION TREATERS

WHO IS THE TYPICAL GT?

- **Millennials** who are likely to be well-educated and have above-average disposable incomes. The segment with the highest proportions of Lisbon residents and most likely to live with a partner and children

INTERESTS AND VALUES

- Having good taste that impresses others
- Organising and facilitating fun events for others
- Staying healthy and active
- Quality over value – willing to invest for better quality products
- Entertaining at home – see home as an expression of their personal taste

RELATIONSHIP WITH WINE

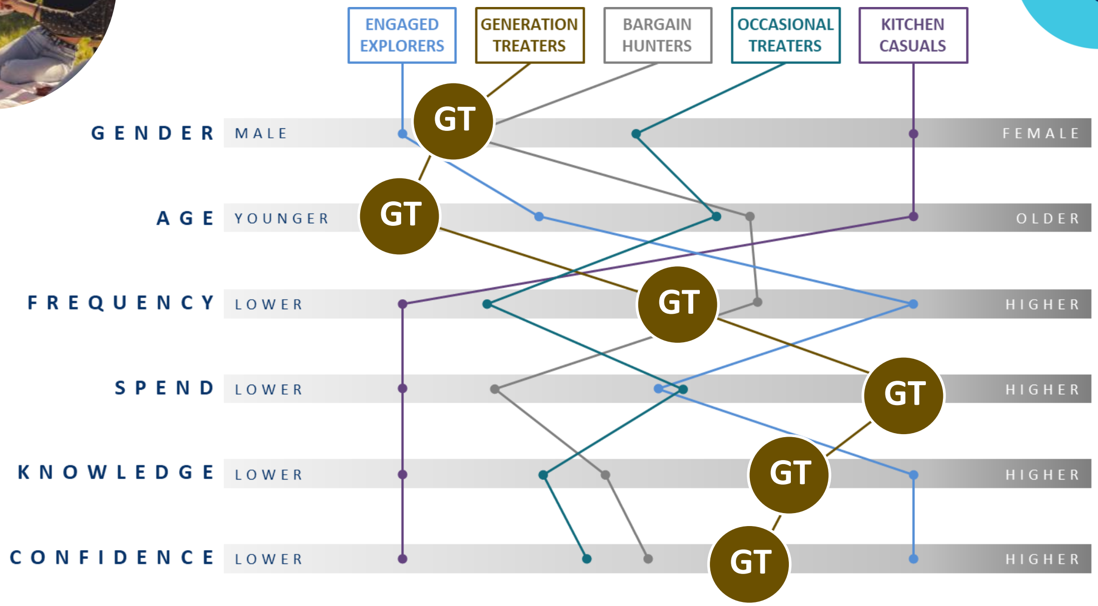
- **Frequent social drinkers**, especially in the on-trade
- **Open.** Newer to wine and therefore spent less time in the category, but still confident and keen to discover new wines
- **Look for wines from smaller, lesser-known producers**

HOW TO ENGAGE THEM WITH WINE

- **Recommendations** – they rely on recommendations for wine purchases, especially in specialised wine stores and from wait staff
- **Tastings / winery visits** – directing them towards a tasting or a winery visit where they can try a wine before buying and establish a connection will grab their attention and keep the brand in their mind

KEY CHALLENGE FOR WINE BRANDS

- **Getting their attention** – all wines on a shelf or menu are open to them



WHERE YOU MIGHT FIND THEM BUYING

Garrafeira Nacional
(both in person and online)

local Independent, wine stores

WHAT YOU MIGHT FIND THEM DRINKING

ESPORÃO

QUINTA DO CARMO
RESERVA TINTO

QUINTA DO VESUVIO

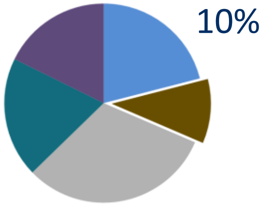
TERRAS do AVÔ

Typical Generation Treater behaviour

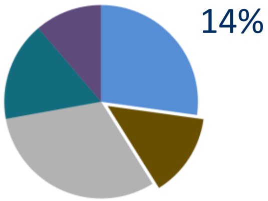
- ✓ Huge range for spend on wine in the off-trade; anywhere from €5 in the supermarket to €30 from a local wine shop
- ✓ Up to €40 in on-trade
- ✓ Shop in specialised wine stores where they can find unique offerings and interact with knowledgeable staff
- ✓ Shop online for wine, but prefer to have the in-store experience
- ✓ Like to order and suggest wines for friends and be the one to provide them with a new wine-drinking experience

GENERATION TREATERS: PROPORTION OF WINE DRINKERS, VOLUME AND SPEND ON WINE

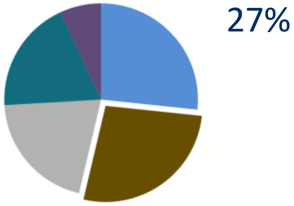
Generation Treaters are one of the **most frequently-drinking** segments and the ones who **spend the most on wine by far.** Though they only account for 10% of the Portuguese wine-drinking population, **they hold over a quarter of the share of total spend on wine in the Portuguese market.** This high frequency and consumption is seen in both the off- and on-trades.



Share of regular wine drinkers **population**



Share of total **volume** of wine sold in Portugal



Share of total **spend** on wine in Portugal

Off-trade	12%	26%
On-trade	17%	29%

Wine consumption frequency (off-trade)

Typical spend per bottle of wine (off-trade)

Wine consumption frequency (on-trade)

Typical spend per bottle of wine (on-trade)

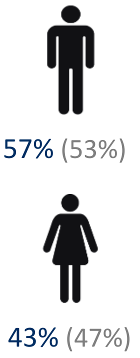
Source: Wine Intelligence, Vinitrac® Portugal, July 2020, October 2020, March 2021 and June 2021 (n=4,100) Portuguese regular wine drinkers

GENERATION TREATERS: DEMOGRAPHICS OF THE TYPICAL CONSUMER

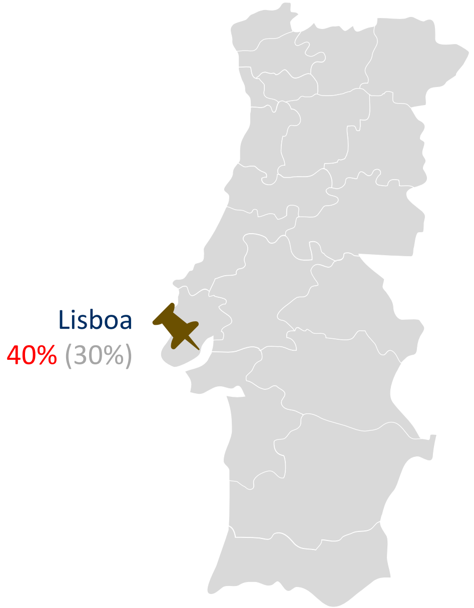
Who are Generation Treaters?

- **Youngest** segment in terms of average age, highest proportions of Millennials (30% vs 21%) and Gen Z (5% vs 2%)
- **Highest disposable income** of all segments
- Segment most likely to live in **Lisbon**
- Majority are **married** and **live with a partner and children**

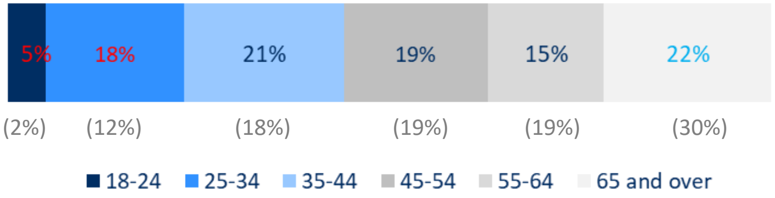
Gender



Where are they?

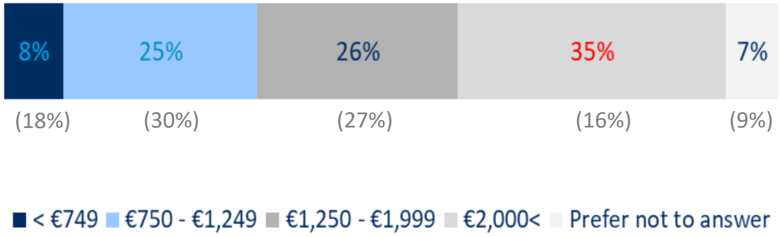


Age

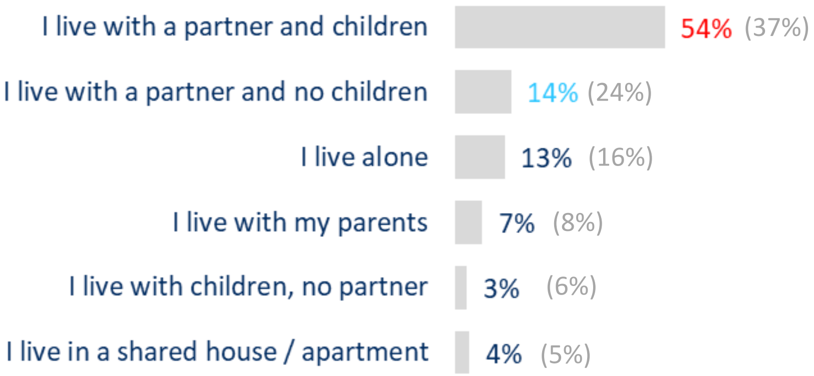


Income

(Monthly personal income after taxes)



Who do they live with?



(%): All Portuguese RWD

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

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

GENERATION TREATERS: VALUES, ATTITUDES & INTERESTS

Willing to pay more for quality, and lead a more sustainable life which impresses others

What's important to them?

- **Quality-seeking** is the most salient defining characteristic in this group, plus a strong bias towards financial news and information, and buying organic produce
- **Want to impress others**, and try to do so by positioning themselves as the one in the group who orders for the table, making group plans, spending money

What are their interests?

% who stated they are interested in each of the following subjects

Travel
75% (68%)

Movies or TV shows
72% (68%)

Cooking
64% (55%)

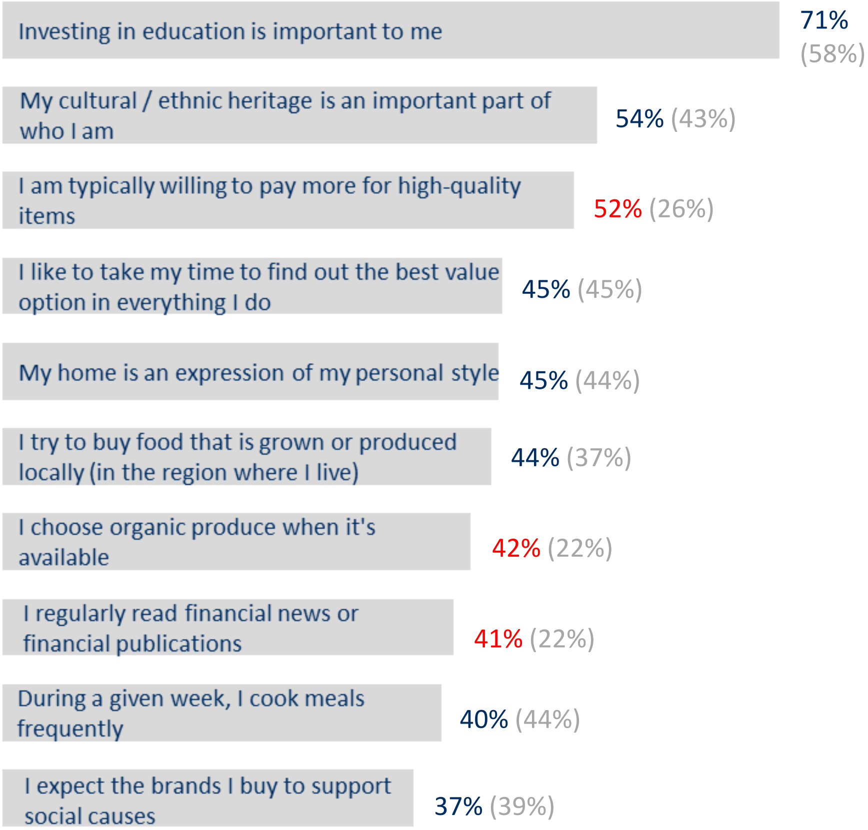
Environmental and sustainable causes
60% (52%)

Home remodelling
53% (43%)

Finance / Investments
49% (36%)

What are their attitudes?

% who 'agree' or 'strongly agree' with each statement



Investing in education is important to me	71% (58%)
My cultural / ethnic heritage is an important part of who I am	54% (43%)
I am typically willing to pay more for high-quality items	52% (26%)
I like to take my time to find out the best value option in everything I do	45% (45%)
My home is an expression of my personal style	45% (44%)
I try to buy food that is grown or produced locally (in the region where I live)	44% (37%)
I choose organic produce when it's available	42% (22%)
I regularly read financial news or financial publications	41% (22%)
During a given week, I cook meals frequently	40% (44%)
I expect the brands I buy to support social causes	37% (39%)

(%): All Portuguese RWD
% / % Statistically significantly higher / lower than all Portuguese regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Portugal, July 2020, (n=2,003) UK regular wine drinkers
Wine Intelligence, consumer interviews

GENERATION TREATERS: MOTIVATIONS FOR DRINKING WINE

Frequent drinkers who see wine as an experience and a situation-enhancer, who love showing off their knowledge and trying new things with their friends

Why do they drink wine?

- **Wine is by far the main choice of alcoholic beverage for this group.** Beer is their second choice but is still very rarely consumed compared with how often they choose wine.
- Drinking wine is seen as **an experience.** They love the discovery aspect of buying wine and really enjoy the process of finding a new producer, a new flavour, or a new region they hadn't yet heard of.
- For them, **wine enhances every aspect of life**: relaxing after a tough day at work, after putting the kids to bed, to add an extra layer of complexity to a meal, or to celebrate the people closest to them.
- **Wine is used to showcase their personal taste and social status,** especially at formal celebrations, social gatherings. They gift or purchase bottles of wine to show that they know a lot about the category and that they have money to spend. **They love feeling as if they have provided someone with a new experience through gifting them a bottle of wine**.

> "I have less opportunity to drink wine now since I have become a father, but **it is always nice to sit down and relax with a glass at the end of the day** when I have the chance."
> *Generation Treater, Male*

> "I always try to explore new wines, new brands, new regions, new winemakers, to have this sense of discovery and exploration when drinking wine. For me, **it's almost like traveling**.
> *Generation Treater, Male*

> "Wine is a great Christmas gift. I gave a few people wine gift sets last year and they love it. **It provided an experience that's new to them**.
> *Generation Treater, Male*

> "I drink wine about three times a week or so, **depending on how stressful work has been that week**."
> *Generation Treater, Male*

Part of a Generation Treater's wine stock

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

GENERATION TREATERS: WINE ENGAGEMENT

Exploration and experience drive their relationship with wine. As already knowledgeable about they category, they look to every cue they can find to help make decisions.

How do they engage with wine?

- **Generation Treaters look to wine for new experiences**. They are open to trying anything **but want to be sure they are getting a quality product for what they are spending**; which is often quite a lot.
- When buying wine, **there is no one cue that drives their decisions**. They often start with one important factor (such as region of origin) and make their way through the selection available in that criteria.
- **They aren't the most knowledgeable or confident segment regarding wine,** but are still more so compared with the average Portuguese wine drinker.
- **They are less bound by tradition and expectations.** They do not limit themselves to "popular" or "standard" types of wines and instead let recommendations and ratings drive them to their next purchase.

> "I tend to pre-select a specific wine region when buying wine and go from there. For example, Alentejo wines tend to be dryer. So if I'm in the mood for a dry wine that day, that's where I will start my search."
> *Generation Treater, Male*

> "I ask the wine shop specialist for recommendations, especially for something new that I would not find in the supermarkets normally, for them to help me out to make a decision on the wine to buy."
> *Generation Treater, Male*

> "I want to know a little bit about the history of the wine, how it's made, what the cask is made from, what region it comes from, and to have a little bit of context about where it comes from before I make a purchase."
> *Generation Treater, Male*

What influences their choices?

- **Occasion is important** – Is this a special occasion? Will their friends who know about wine be there? Are they eating dinner?
- **Generation Treaters** know what they have tried in the past and will lead those experiences to guide them to something similar, but still different.
- Producer, region and food pairings **help to start them off** in the wine-buying decisions.
- **Price barely impacts decision-making**, though they do use it to understand a brand's positioning in the market.
- This segment **lives by staff recommendations** in both the off- and on-trade.

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

GENERATION TREATERS: ALCOHOL REPERTOIRE AND WINE ORIGINS

Broad alcohol repertoire with strong preference for artisanal drinks

What do they drink?

- With **one of the broadest alcohol beverage repertoires** of all segments, this group **over-indexes on most drinks** compared to the average consumer.
- They segment **most likely to drink rosé wine**, though this is still fairly infrequent compared with red / white wine.
- Drink both popular and lesser-known varietals, though **this is not really an impacting factor** in terms of the wine they buy.
- **Douro, Alentejo and Dão** were the most often reported regions which they buy from.
- Are interested in lesser-known producers and **actively seek our brands they haven't heard before**.

Top Varietal Consumption

% who have drunk the following varietals in the past 6 months

1. Touriga Nacional 58% (48%)
2. Alvarinho 56% (49%)
3. Aragonez / Tinta Roriz 41% (32%)
4. Moscatel 41% (30%)
5. Chardonnay 38% (19%)

Compared with other segments, they are more likely to drink: Champagne and liquors (especially in cocktails)

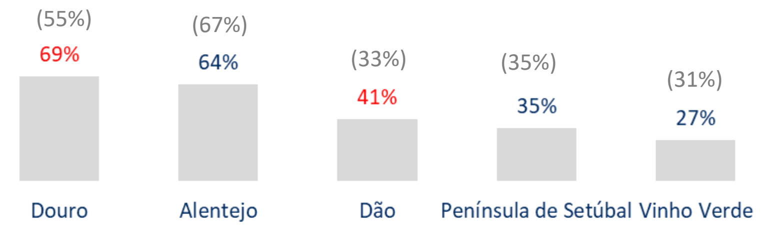
Top 5 alcoholic beverages: Past 12 months

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

Red Wine	White wine	Beer	Port Wine	Rose wine
89% (87%)	83% (82%)	81% (80%)	59% (57%)	57% (47%)

Region of origin purchase: Top 5

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



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Wine Intelligence, consumer interviews

GENERATION TREATERS: WHERE THEY BUY WINE

Specialised wine shops and wineries are often used to buy wines

Where do they buy wine?

- They are much more likely to buy wine from **specialised stores** where they can find **niche, quality wines and interact with store staff** that they know.
- As the segment values quality, **they also buy direct from wineries they are aware of and trust**.
- **Internet purchases are less common**, but they are the segment **most likely to utilise the Internet** for buying wine.

Places you might find them buying wine

Independent,
local wine stores

Top 10 wine buying channels

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

> "I buy wine in supermarkets and wine shops. And sometimes when I travel, like the last time that I went Lisbon I walked through the duty free and there was a sale that the price was actually good on the wine."
> *Generation Treater, Male*

(%): All Portuguese RWD

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

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

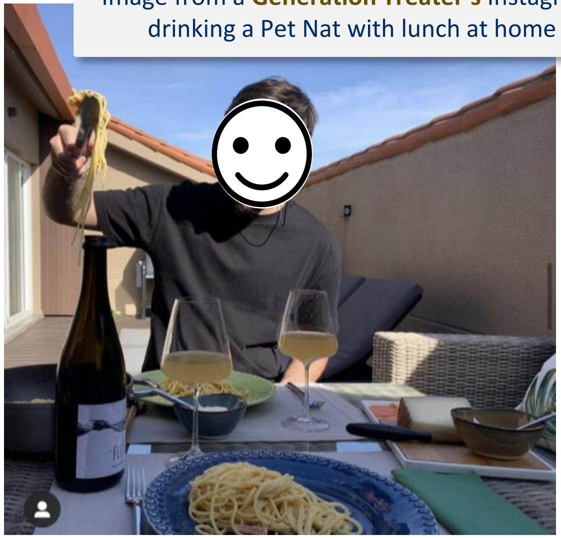
GENERATION TREATERS: HOW DO THEY SHOP FOR WINE?

Complex decision tree, typically starting with a price range and/or region, and blending recommendations and information from multiple sources

How do they shop in the off-trade?

- When buying wine, **Generation Treaters look to multiple cues simultaneously** to help them decide which wine to purchase.
- In line with their general attitude of quality over value, **Generation Treaters** are **much less likely to be swayed by price or promotional offers**.
- When buying wine, **they start with a single criteria** (ie region or price) **and go from there**; dependent on the situation / occasion they're buying for.
- They prefer to shop in **specialised, local wine shops because of the knowledgeable staff**, who they always ask for recommendations from and often come to know personally.
- Will still shop in more commercialised settings (such as Garrafeira Nacional) **but will utilise apps such as Vivino to affirm their decisions** in the absence of knowledgeable staff to help to direct them.
- **Label design is not a key factor for them in making wine-buying decisions** but could be what sways them to one bottle when comparing two that are otherwise identical.

Image from a **Generation Treater's** Instagram, drinking a Pet Nat with lunch at home



> "I ask for staff recommendations at specialised retailers, but at non-specialised ones, I use the Vivino to scan the labels and do that discovery on my own."
> *Generation Treater, Male*

> "Sometimes the design of the label makes me curious, but it isn't a big factor for me in purchasing the wine."
> *Generation Treater, Male*

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

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

GENERATION TREATERS: HOW DO THEY ENGAGE IN THE ON-TRADE?

Most frequent on-trade drinking segment that relies almost exclusively on waiter recommendations when buying wine to drink outside of the home

Wine in the on-trade

- **Segment most likely to drink in the on-trade**, though still quite a bit less than how often they drink at home.
- **Consume wine in the on-trade for more formal dinners out**, especially for special occasions, **and occasionally for a relaxing drink at the end of a day**.
- When buying wine in the on-trade, **they rely almost exclusively on recommendations from waitstaff** to guide them.
- Though they are willing to spend quite a bit on wine, **they are wary of over-spending at restaurants** as they know wine is often quite marked up in the on-trade.

A group of **Generation Treaters** sharing wine at a restaurant, from a GT's Instagram

> "I went to a restaurant in Lisbon with a couple of friends, and our waiter recommended a wine that would be good to eat with our meal. He let us taste is so we could decide if we wanted it, which I really liked."
> *Generation Treater, Male*

> "I asking recommendations from the waiter and he told me to try a white wine, because we were eating fish and that's how I discovered a new brand."
> *Generation Treater, Male*

> "There's a restaurant that I really like that has Nat Cool. And I know that perhaps it could be a little more expensive in a restaurant, but I know the wine, I know how good it is. And most of the times when I don't know how good a wine is, I ask if the waiter. If he convinces me, I choose it."
> *Generation Treater, Male*

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

GENERATION TREATERS: WHICH WINE BRANDS DO THEY BUY?

Completely un-loyal to brands, they only recall brand names they have personal connections with. Tend to go for smaller, lesser-known producers

What is their attitude towards brands?

- **They are completely un-loyal to wine brands** as they are always looking towards their next wine discovery.
- **Can only remember names of brands they have personal connections with**, such as visiting a winery or brands the watched their parents always drink as they grey up.
- Repertoires are comprised of **brands from small, lesser-known producers**.

> "Well, so Esporão is my father's favourite, then we have Cortes de Cima is one that my mom enjoys a lot. So those two are easy decisions. Then the other ones are my choices. Quinta da Pacheca especially - I am enthusiast of that vineyard, because I think they make really good wines and I visited the property last year so it is a special place for me."
> *Generation Treater, Male*

Brands you might find them drinking:

ESPORÃO

TERRAS do AVÔ

CORTES DE CIMA
FAMILY VINEYARDS

QUINTA DO CARMO
RESERVA TINTO

PACHECA

QUINTA DO VESUVIO

JP
AZEITÃO
TINTO

VALLADO

Images from a Generation Treater

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

GENERATION TREATERS: ALTERNATIVE WINES

Awareness of alternative wine types is low, and those who are aware don't actively seek them out – but there is marginal interest

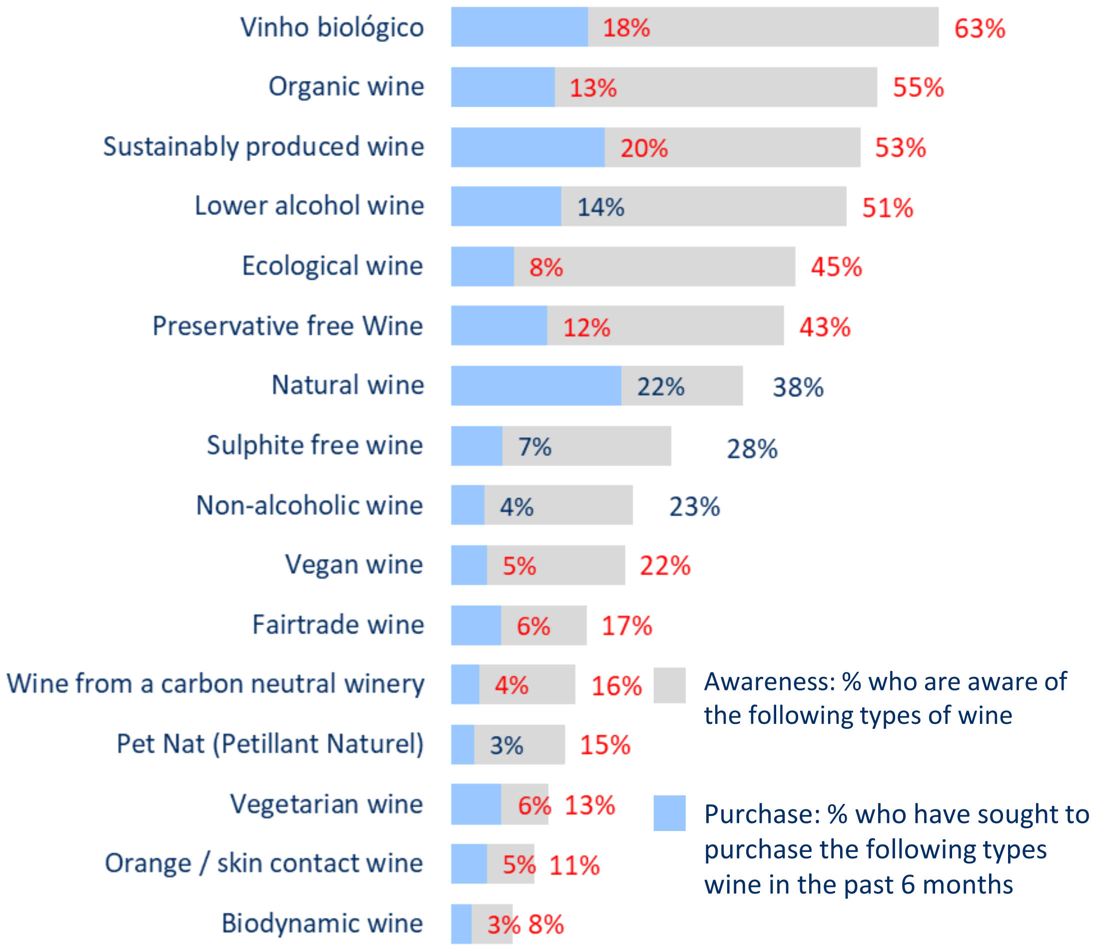
What do they think about alternative wines?

- Generation Treaters are **more likely to be aware of varying alternative wine types** compared with other consumers, **but it is still relatively low**.
- However, despite this awareness, **purchase incidence is even lower**.
- To them, **wine remains predominantly about taste and experience** rather than any secondary benefits.

> "I do have an interest in natural wines. I actually got to know natural wines through a documentary on Vice YouTube channel with a famous rapper, which is Action Bronson, who was previously a chef.
> So he was doing a tour through natural wines and French restaurants, and that's how I got to know the process of natural wines. I already tried one or two."
> *Generation Treater, Male*

> "A wine isn't better than others because it's "biological", it's more about the taste.
> *Generation Treater, Male*

Awareness and purchase of alternative wines



% / % Statistically significantly higher / lower than all Portuguese regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Portugal, July 2020, (n=2,003) UK regular wine drinkers
Wine Intelligence, consumer interviews

GENERATION TREATERS: ALTERNATIVE WINE PACKAGING FORMATS

They've tried alternative formats, but aren't very interested as they prefer the experience that comes with opening and sharing a bottle of wine

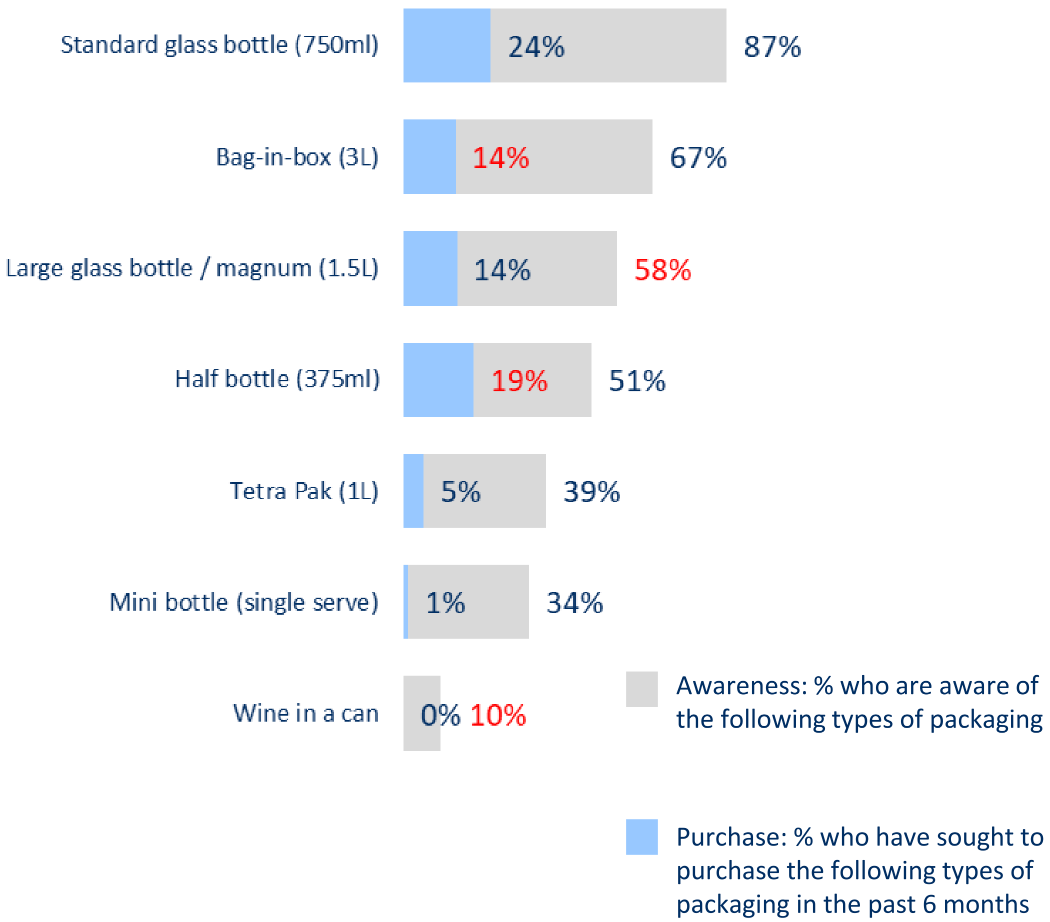
What do they think about alternative packaging formats?

- As a result of their inquisitiveness, **Generation Treaters have tried various packaging formats** of wine alternative to the standard 750mL glass bottle.
- Whilst these formats do have a small place in their wine-drinking lives, **they do not suit the bottom line of *experience* that drives Generation Treaters**.
- Additionally, bag-in-box's turn them off as they like to regularly try new things, and **aren't as interested in committing to 3-5 litres of one wine at once**; especially if they haven't tried it before.

> "A box of wine just doesn't have the same taste or feeling that opening a bottle of wine has."
> *Generation Treater, Male*

> "I don't have a great image or a great perception of boxed wines or canned wines. I try to avoid these. I know they can be a great alternative as a day-to-day wine but I like to explore, so I don't like to commit to three or five litres of the same wine. Plus it's just not the same as drinking from a bottle in my opinion."
> *Generation Treater, Male*

Awareness and purchase of alternative packaging formats



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Wine Intelligence, consumers interview

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BARGAIN HUNTERS

WHO IS THE TYPICAL BH?

- Tend to be older Portuguese wine consumers, typically **55+ Boomers** with **low-to-medium incomes.** They have high category knowledge but average confidence

INTERESTS AND VALUES

- Finding good deals
- Their homes – Cooking, decorating, remodeling
- Keeping fit and staying healthy

RELATIONSHIP WITH WINE

- Wine is part of their regular routine, drinking it with meals a few times per week
- Very knowledgeable about wine, developed through years of experience
- Frequent drinking, low spending, price-driven consumers who always look for the best-value wines for their money

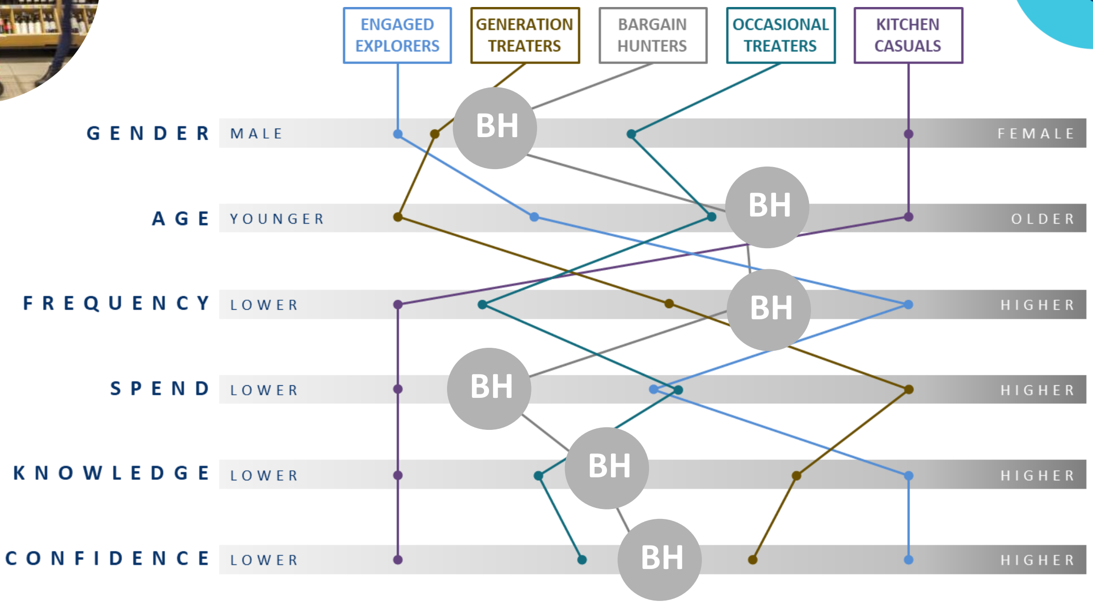
HOW TO ENGAGE THEM WITH WINE

- **Promotions** – they are seeking out drinkable wine at an affordable price point for them
- **Apps** – Use Vivino ratings to help them decide what to buy
- **Off-trade** – mostly consume wine in the off-trade and seldomly in the on-trade
- **Staff recommendations** – Like to ask staff for recommendations in both the off- and on-trades (within their price ranges)

KEY CHALLENGE FOR WINE BRANDS

- **Conveying good value** – price is paramount for Bargain Hunters and they want to feel like they are getting a good value for money with their purchase

wine intelligence



WHERE YOU MIGHT FIND THEM BUYING

Continente

pingo doce

LIDL

WHAT YOU MIGHT FIND THEM DRINKING

MonteVelho

Dona Ermelinda

Periquita

Papa Figos

Planalto

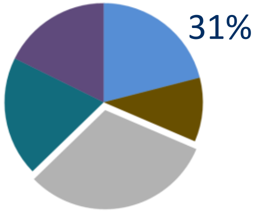
Typical Bargain Hunter behaviour

- ✓ Will spend between €2 and €4 off-trade and below €10 in the on-trade if possible
- ✓ Shops wine while buying groceries – they rarely shop from online channels
- ✓ Promotion-driven, price is front of mind when shopping
- ✓ Average knowledge and confidence – will buy mainstream brands they recognise and rely on recommendations

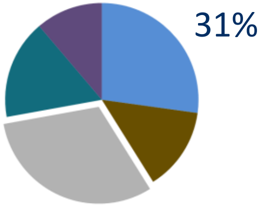
vinitrac

BARGAIN HUNTERS: PROPORTION OF WINE DRINKERS, VOLUME AND SPEND ON WINE

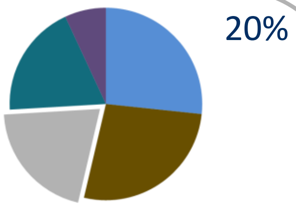
Bargain Hunters account for **nearly a third of the wine drinking population** in Portugal. They hold **just under a third of the total volume of wine sold** in Portugal (comprising mostly from the off-trade), **but account for only a fifth of the total spend on wine** in Portugal. The drink occasionally, a few times per week, and are one of the two **lowest spending segments.**



Share of regular wine drinkers **population**



Share of total **volume** of wine sold in Portugal



Share of total **spend** on wine in the Portugal

Off-trade	33%	21%
On-trade	26%	19%

Wine consumption frequency (off-trade)

Typical spend per bottle of wine (off-trade)

Wine consumption frequency (on-trade)

Typical spend per bottle of wine (on-trade)

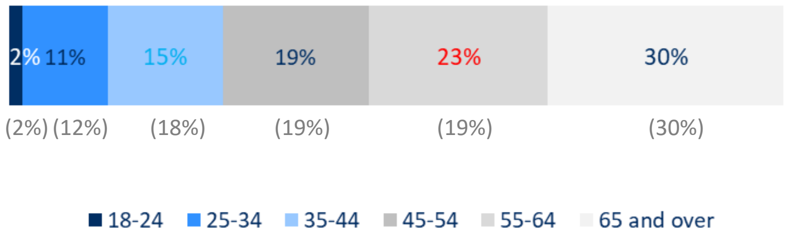
Source: Wine Intelligence, Vinitrac® Portugal, July 2020, October 2020, March 2021 and June 2021 (n=4,100) Portuguese regular wine drinkers

BARGAIN HUNTERS: WHO ARE THEY?

Who are Bargain Hunters?

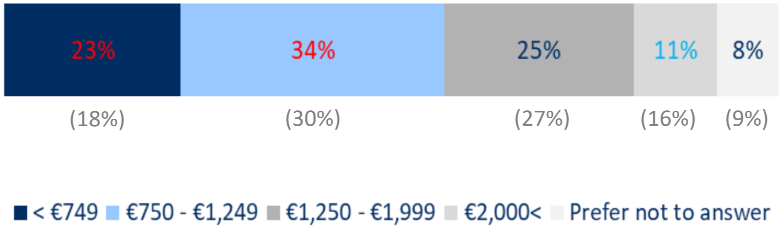
- **Slight male bias** (55% male vs 45% female)
- A slightly older segment, with **more than half aged 55 or older**
- **Low monthly personal income**, as the majority earn <€1,250 per month (57% vs 48%)
- Similar geographic distribution when compared with all Portuguese regular wine drinkers
- High category knowledge, but average category confidence
- Mid-level involvement with the wine category; they aren't as adventurous as some other segments, but do enjoy trying new wines often
- Most are married, but a higher proportion are single compared with all Portuguese wine drinkers
- **Behaviourally, they are the segment most similar to the average Portuguese regular wine drinker**

Age

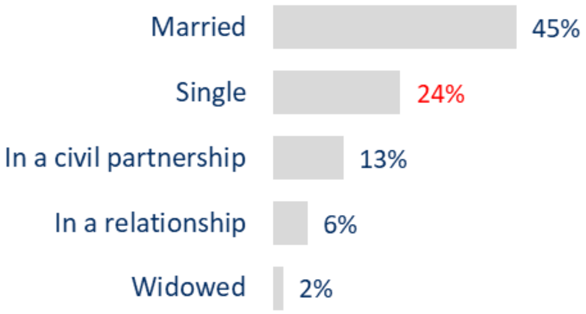


Income

(Monthly personal income after taxes)



What's their relationship status?



(%): All Portuguese RWD

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

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

BARGAIN HUNTERS: VALUES, ATTITUDES & INTERESTS

Bargain Hunter attitudes tend to occupy the middle ground of Portuguese wine drinker sentiment

What's important to them?

- Their **health**, taking care of themselves and cutting down on unhealthy habits
- Consistent with their level of income, they enjoy **spending time to look for best value options**
- In statistical terms, views are identical to the average Portuguese regular wine drinker

What are their interests?

% who stated they are interested in each of the following subjects

Spending time outdoor
74% (72%)

Movies or TV shows
65% (68%)

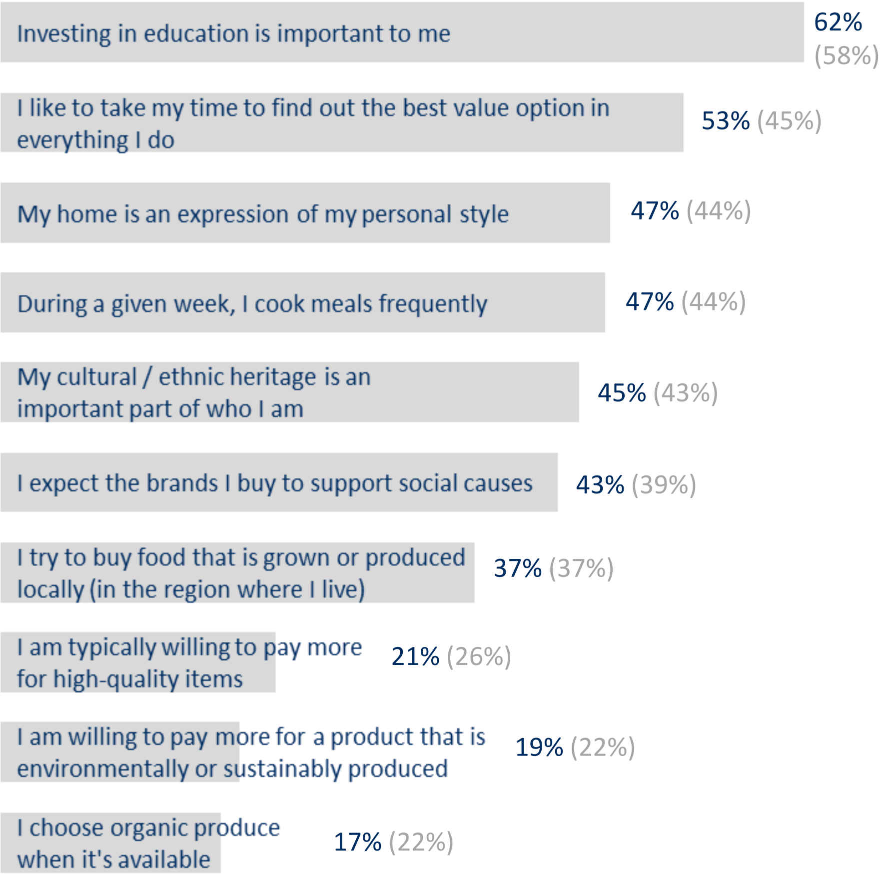
Travel
64% (68%)

Healthcare
64% (37%)

Cooking
51% (55%)

What are their attitudes?

% who 'agree' or 'strongly agree' with each statement



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Source: Wine Intelligence, Vinitrac® Portugal, July 2020, (n=2,003) UK regular wine drinkers
Wine Intelligence, consumer interviews

BARGAIN HUNTERS: MOTIVATIONS AND ENGAGEMENT

Value-driven consumers who split their drinking between loved mainstream brands and undiscovered unknown brands

Why do they drink wine?

- **Bargain Hunters** **find pleasure drinking wine** and like to mix-and-match between their favourite tried-and-tested brands and new, undiscovered brands.
- Wine is **frequently drunk with meals in both casual or more formal occasions**, both alone and with family and friends.
- They are **fairly involved with the wine category**. With years of wine-drinking experience, they are confident in choosing a bottle of wine based on what they know.
- They **mostly drink in the off-trade and rarely in the on-trade**. When they do drink wine, it's mostly with intimate dinners at restaurants.

> "When I'm hosting a big dinner, I normally buy brands I know because I know everyone likes them. If it's only for me or for a couple of friends, I like to mix things, so it's not always the same."
> *Bargain Hunter, Female*

> "Usually I drink wine when having dinner with my husband at home, on Fridays and Saturdays when friends come over, and sometimes late afternoon for just spending some time on the balcony with some rosé or white wine."
> *Bargain Hunter, Male*

What influences their choices?

- **They are highly promotion- and price-driven.** They don't mind spending time to find the best value option.
- They look at brands and wineries they are familiar with, and have a set couple of mainstream brands they go to for their price-to-value ratio.
- As wine is **often drunk with friends and family**, this segment is also open to recommendations from them.

> "Wines that I buy are generally expensive wines on promotion. I look at the labels, the vintage, and then the different varieties that are in that particular wine, and then I just buy it to try it out because it's only like €3."
> *Bargain Hunter, Male*

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

BARGAIN HUNTERS: ALCOHOL REPERTOIRE AND WINE ORIGINS

Similar repertoire as the average wine drinker in Portugal: mostly mainstream wines readily available in supermarkets

What do they drink?

- **Wine is their main drink of choice** and the only one they will have with meals.
- They also consume beer and spirits, **but only at the bar or in other very specific places**, such as parties.
- Though they have higher wine knowledge on average compared with the average drinker, **fewer of them know various varietals and regions.**
- **Only buy wine from Portugal** as they like the quality for the price.
- **Douro and Alentejo** are the top 2 preferred regions.

Top Varietal Consumption

% who have drunk the following varietals in the past 6 months

1. Touriga Nacional 47% (48%)
2. Alvarinho 46% (49%)
3. Aragonez / Tinta Roriz 32% (32%)
4. Castelão / Periquita 30% (29%)

> "I try new wines whenever I travel, but I can't remember any brand names. When I'm home, though, I basically only drink Portuguese wine."
> *Bargain Hunter, Male*

> "I like Alentejo wines, but I can't tell you why. I'm just used to them."
> *Bargain Hunter, Male*

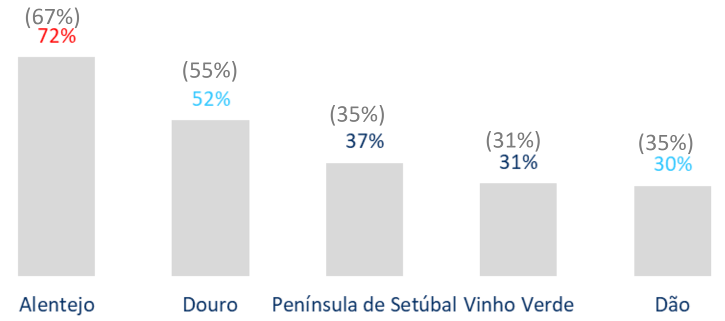
Top 5 alcoholic beverages: Past 12 months

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

Red Wine	White wine	Beer	Port Wine	Rose wine
89% (87%)	82% (82%)	80% (80%)	55% (57%)	43% (47%)

Region of origin purchase: Top 5

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



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Wine Intelligence, consumer interviews

BARGAIN HUNTERS: WHERE THEY BUY WINE

Supermarkets are their dominant wine-buying channel as they offer the best value and convenience

Where do they buy wine?

- **The supermarket is the most dominant channel** Bargain Hunters use to shop for wines, as it often offers good discounts or deals.
- The supermarket is also a convenient wine-buying channel for them because they **often pick wine up with their usual grocery shop.**
- They don't often buy wine online for the same reason they don't use specialist stores; **they don't think it's necessary because there is so much good wine readily available.**

Places you might find them buying wine

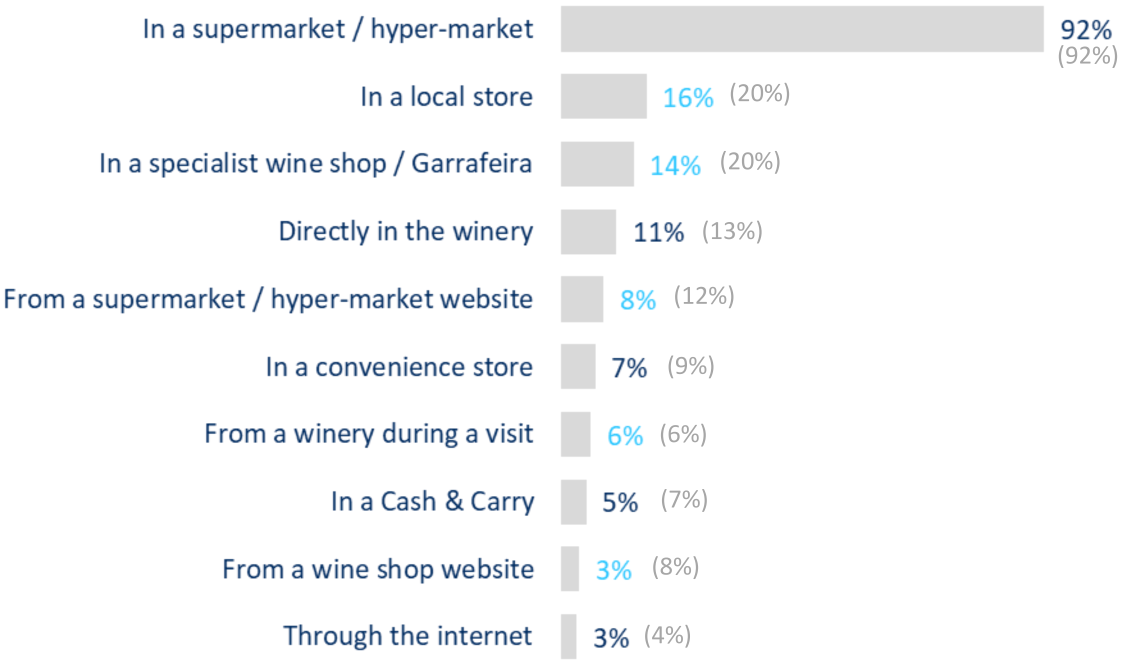
CONTINENTE

pingo doce

LIDL

Top 10 wine buying channels

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



> "I always shop in supermarkets, especially the major ones Pingo Doce or Continente. You have, I don't know, 100 types of wines you can choose from there. I have a local store near me, but I don't go much because I can always find what I'm looking for in the supermarket."
> *Bargain Hunter, Male*

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Wine Intelligence, consumer interviews

BARGAIN HUNTERS: HOW DO THEY SHOP FOR WINE?

Always shop for wine by price in any situation, then look for suggestions as they're open to anything within their spend range

How do they shop in the off-trade?

- In line with their general attitude regarding value, **price is the main purchase driver.**
- After price, **they are very open to any type of wine** that fits within their desired spend range.
- **Use apps like Vivino to affirm their decisions** when they find bottles they like.
- **Regions / wineries they like or can identify with** are factors they also look at when buying everyday wines to narrow down their choice.
- Labels aren't a huge cue for them, but they **prefer ones that provide a bit of information about the wine or draws their attention**.

"I like the Trinca Bolotas label. The design is a very pretty orange with the pig in the middle. I think it's appealing and it calls the attention of the consumer."
Bargain Hunter, Male

"My first criteria is what's on promotion. After that, I like to choose new wines. I use Vivino to see the critics and the comments about the wines."
Bargain Hunter, Male

Wine in the on-trade

- Their on-trade buying process is **identical to that for their off-trade decisions**.
- Then, once they've decided on the price range they're happy to spend within, **they often ask for suggestions from wait staff** as they're open to nearly all styles and regions.
- **They are often the ones to choose which wine to buy for the table**, but they're also open to those they're with making the decisions regarding wine.
- **Often stick to the house wine** due to high quality / price ratio for them.

"When I order at restaurants, I usually I go for the region because there might be wines that I've never tasted before. Or, I'll ask the waiter to suggest a wine according to the price I want to spend."
Bargain Hunter, Female

"Normally every restaurant has their own wine, which is cheaper because they have this partnership with some wines. We normally try that wine."
Bargain Hunter, Male

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Wine Intelligence, consumer interviews

BARGAIN HUNTERS: WHICH WINE BRANDS DO THEY BUY?

Buy mostly mainstream, inexpensive brands available in supermarkets, but will occasionally branch out to others

What is their attitude towards brands?

- Brand is not an important cue to them, **as price dominates all decisions**.
- **They tend to repeat some brands as they know they're good quality for their price**; these are almost always popular supermarket brands at the <€5 price point.
- Will occasionally branch out and **try other wines from local shops**, but this is fairly uncommon.

Typical Bargain Hunters wine repertoire

Brands you might find them drinking:

MonteVelho

JOSÉ MARIA DA FONSECA • VI •

Dona ERMELINDA

PERIQUITA

PAPA FIGOS

PLANALTO

João Pires

FIUZA

> "Planalto is my number one choice because you can find it everywhere, including in restaurants."
> *Bargain Hunter, Female*

> "Fiuza is soft wine, you can drink it with anything you eat, so it's quite good. It's a safe choice. Monte Velho is the same. These two are very commercial here in Portugal. A lot of people like them and buy them a lot. They're on promotion all the time."
> *Bargain Hunter, Female*

(%): All Portuguese RWD

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

BARGAIN HUNTERS: ALTERNATIVE WINES

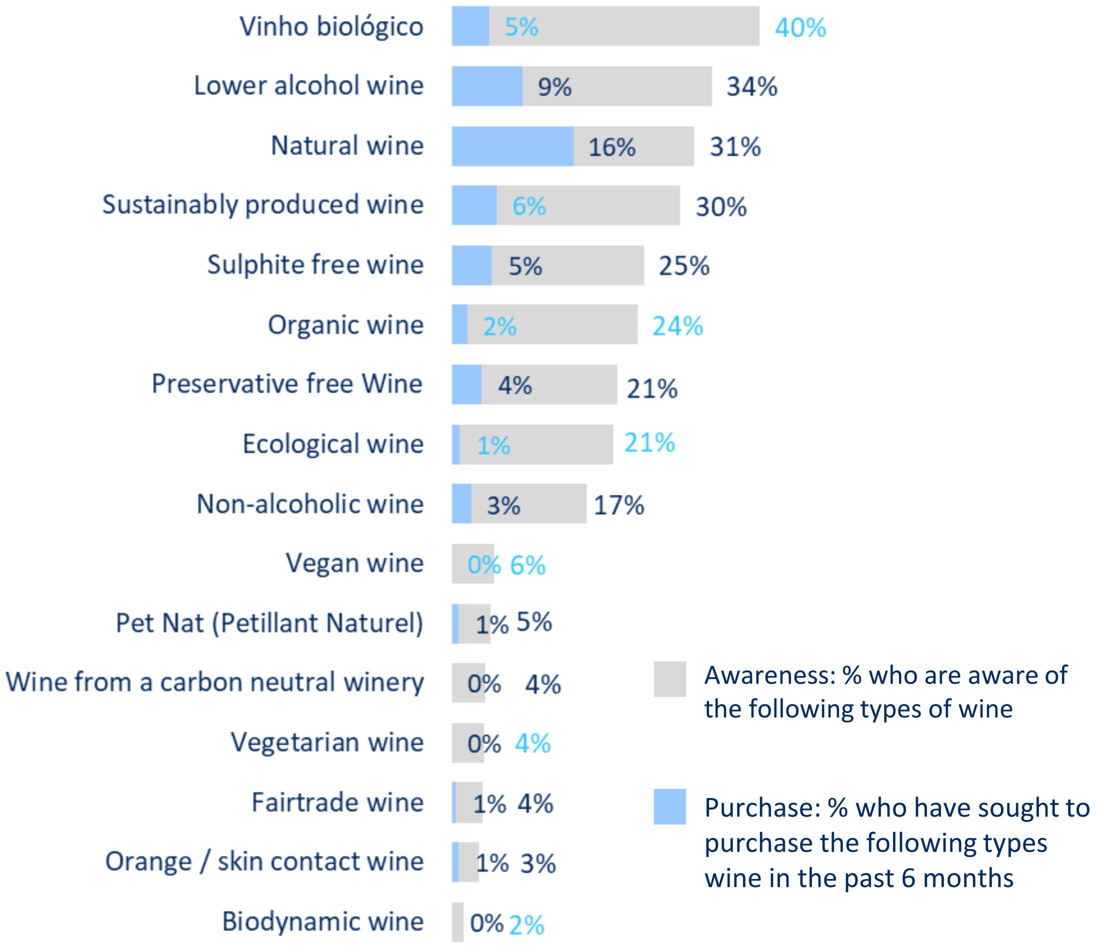
Lower awareness of alternative wines than average wine consumers, but open to purchasing as long as they suit their price ranges

What do they think about alternative wines?

- Perhaps explained by limited purchasing channels and exposure to alternative wines, **they have significantly lower awareness of them** than average wine drinkers and are less likely to have purchased them before.
- Of consumers who are aware of these types, one tried organic wine and said he did not like the taste of it; which likely has put him off the whole category.
- They will consider alternative wine types; and **purchase them as long as they fall in their pre-defined price range**.

> "I've tasted organic wine, because I work in organic sector. And I did try a few wines that I liked, but if I had to choose, I would not go for the organic wines. Just the taste, it's quite different. Its just different."
> *Bargain Hunter, Male*

Awareness and purchase of alternative wines



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Wine Intelligence, consumer interviews

BARGAIN HUNTERS: ALTERNATIVE WINE PACKAGING FORMATS

Aware of alternative types, but low purchase and interest

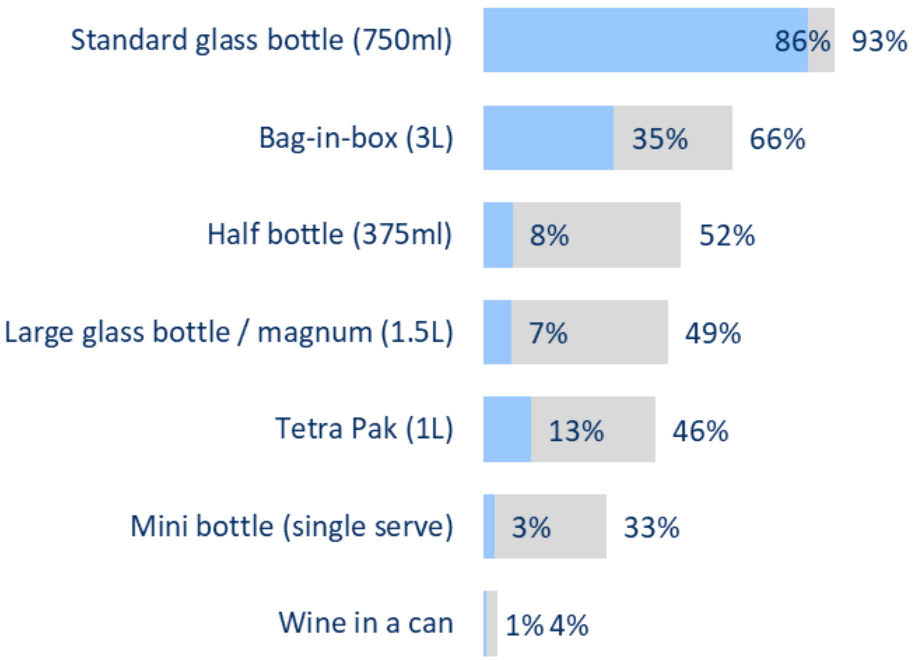
What do they think about alternative packaging formats?

- Varying opinions from **Bargain Hunters** regarding alternative packaging types.
- **Buy them more for particular social occasions (eg gifting) and less for personal consumption**.
- **Not very interested in cans**, as they like the experience and ritual that comes with opening a bottle and pouring it in a glass.

> "I've never tried cans, but I have tried bag-in-box before, and there's nothing to complain about with them. The ones I have tried taste good."
> *Bargain Hunter, Male*

> "I've never tried wine in a can, but maybe I would. Drinking wine is a ritual, and I like pouring wine in a good glass. I'm not sure where canned wine would fit here in Portugal."
> *Bargain Hunter, Male*

Awareness and purchase of alternative packaging formats



Standard glass bottle (750ml)	86%	93%
Bag-in-box (3L)	35%	66%
Half bottle (375ml)	8%	52%
Large glass bottle / magnum (1.5L)	7%	49%
Tetra Pak (1L)	13%	46%
Mini bottle (single serve)	3%	33%
Wine in a can	1%	4%

▨ Awareness: % who are aware of the following types of packaging

🟦 Purchase: % who have sought to purchase the following types of packaging in the past 6 months

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Source: Wine Intelligence, Vinitrac® Portugal, July 2020, (n=2,003) UK regular wine drinkers
Wine Intelligence, consumer interviews

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OCCASIONAL TREATERS

wine intelligence

WHO IS THE TYPICAL OT?

- Demographically identical to the average Portuguese regular wine drinker. Middle-aged to older consumers with higher incomes and below average wine category knowledge and confidence

RELATIONSHIP WITH WINE

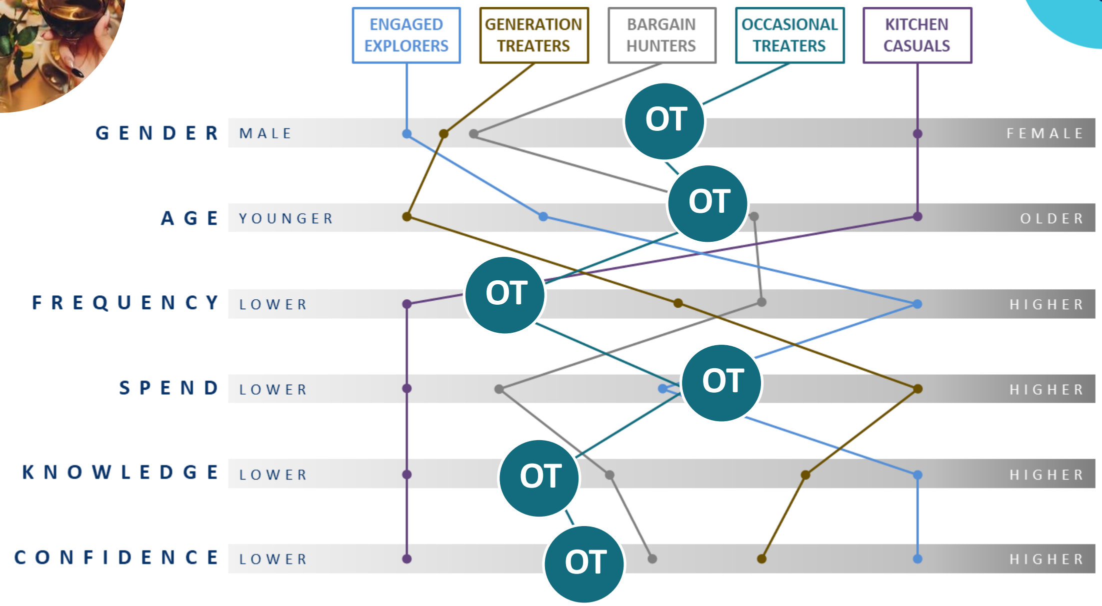
- Infrequent drinkers in both off- and on-trade
- Wine is a treat for special occasions. They don't drink often, but when they do they spend a little bit more than average. This ensures higher quality to them
- Lower knowledge and confidence as they are less involved with the category
- Generally conservative in their wine choices, most often opting for brands they know. However, they are open to lesser-known brands, especially if a friend or staff member recommends them

HOW TO ENGAGE THEM WITH WINE

- **Special occasions** – like to treat themselves (and their guests) to wine at special social events
- **Recommendations** – discover new wines through word of mouth
- **Food pairings** – they look to find wines at meals that complements what they're eating

KEY CHALLENGE FOR WINE BRANDS

- Lack of confidence with wine might hold them back from trying wines they would otherwise enjoy



WHERE YOU MIGHT FIND THEM BUYING

CONTINENTE
Intermarché
jumbo

WHAT YOU MIGHT FIND THEM DRINKING

MonteVelho
ALANDRA
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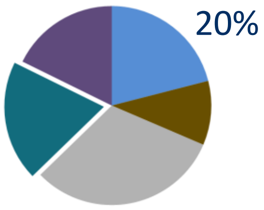
VALLADO
TERRAS DE LAVA

Typical Occasional Treater behaviour

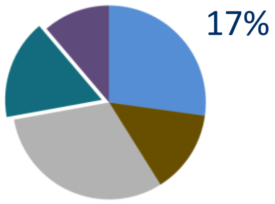
- ✓ Above average spend: between €5-10 in the off-trade and €8,00+ in the on-trade
- ✓ Shop for wine in large supermarkets, rarely specialised stores
- ✓ Buy both mainstream and niche wine styles and types
- ✓ Rely on price and recommendations from family, friends and staff to ensure they buy the best quality wine

OCCASIONAL TREATERS: PROPORTION OF WINE DRINKERS, VOLUME AND SPEND ON WINE

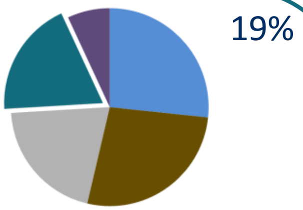
Occasional Treaters drink wine less than most segments, though they have **mid-level spend**. They account for about a **fifth of the wine drinking population, volume and spend** in the Portuguese wine market.



Share of regular wine drinkers **population**



Share of total **volume** of wine sold in Portugal

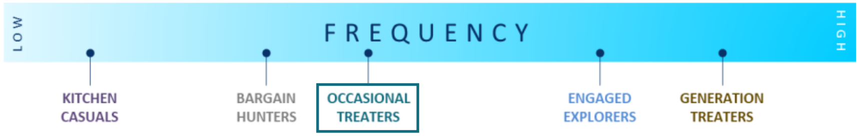


Share of total **spend** on wine in the Portugal

Off-trade	16%	19%
On-trade	18%	19%

Wine consumption frequency (off-trade)

Typical spend per bottle of wine (off-trade)



Wine consumption frequency (on-trade)

Typical spend per bottle of wine (on-trade)

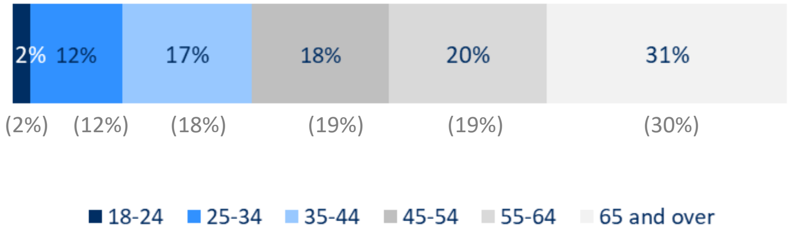
Source: Wine Intelligence, Vinitrac® Portugal, July 2020, October 2020, March 2021 and June 2021 (n=4,100) Portuguese regular wine drinkers

OCCASIONAL TREATERS : WHO ARE THEY?

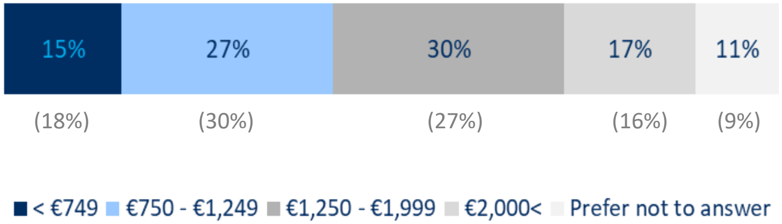
Who are Occasional Treaters?

- **Demographically identical to the average Portuguese regular wine drinker**
- Segment with **most even gender split**
- **Middle-aged to older consumers**, with half aged 55 or older
- Mid-to-high income
- **Below average wine category knowledge and confidence**, which they are aware of
- Low to medium involvement in the wine category
- Stick to wine types they know, but also enjoy trying new things

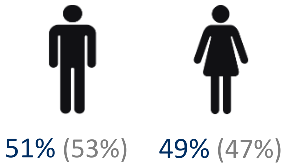
Age



Income
(Monthly personal income after taxes)



Gender



(%): All Portuguese RWD
% / % Statistically significantly higher / lower than all Portuguese regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Portugal, July 2020, October 2020, March 2021 and June 2021 (n=4,100) Portuguese regular wine drinkers

OCCASIONAL TREATERS: MOTIVATIONS AND ENGAGEMENT

They don’t drink very often, but when they do, they use it to enhance special occasions such as formal dinners or hanging out with friends

Why do they drink wine?

- Wine is used to **enhance special occasions** in both the off- and on-trade, **such as more formal dinners or social occasions with friends**.
- They especially like to **drink with meals and pair wines with their food**.
- They don’t often drink wine, so when they do, **they want to make sure they’re having the best experience possible**. To do so, they are **willing to spend a bit more** per bottle.
- **Relaxing is not the main driver for their wine drinking**, and they don’t do so often enough to keep many bottles at home.

> “I don’t drink wine so much at home. I feel like I may want a drink today, but then tomorrow I just won’t have any. I end up with so many open bottles that spoil because I just don’t drink a lot during the week.”
> *Occasional Treater, Male*

> “I try to drink things that will surprise me. I'm not the type person who buys the same bottle of wine every time. I like to drink different wines every day. I do like to repeat wines if I really love them, but my aim is to drink different things all the time.”
> *Occasional Treater, Female*

What influences their choices?

- **Recommendations play a large role in the wine they drink**. As they don’t have very deep category knowledge, they are always looking to others (friends, family, wait staff) to direct them to their next discovery.
- **Brands who are established signal quality to them** as they believe a wine must be good if it has been in production for an amount of time. **They want to buy from smaller producers, but just don’t have the drive to actively seek them out**.
- **Price always plays a role** as though they are willing to spend a bit when they buy wine, they want to maintain the quality-to-value ratio.

> “I think I usually tend to have a price in my head. Let's say, I'll try to anchor around €8-10 because you can get really good value for money for Portuguese wine at that price. I wouldn't go below €4 though, I think it will just not be good enough.”
> *Occasional Treater, Female*

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

OCCASIONAL TREATERS: WINE AND BRAND REPERTOIRE

Mainly buy premium types of mainstream brands but are also open to exploring lesser-known types of wine

What do they drink?

- **Similar alcoholic beverage repertoire** compared with all Portuguese regular wine drinkers; where wine is their main beverage, but they also occasionally drink beer.
- Buy predominantly from Portugal but are the segment that **buys the most imported wine**. Throughout their time, they've travelled and lived abroad, learning about the wines of different countries which they occasionally buy back in Portugal.
- **They used Covid as a time for exploration**, and as a result of this and other life changes (e.g. children), **seem to now be consuming lighter styles such as Pinot Noir and lower / no alcohol options.**

> "I feel like I have developed a new taste for wines during Covid. I completely stopped with the full-bodied reds, and now I go for slightly cold light reds."
> *Occasional Treater, Female*

What is their attitude towards brands?

- **Look to established brands / producers as a signal of quality.** In their eyes, if a brand has been around a while, they assume it's higher quality than one that hasn't.
- They are likely to choose the premium / "reserve" version of these mainstream brands as **they perceive the quality to be higher.**
- However, they also l**ook to more niche brands as they aren't afraid to explore lesser-known wines**, especially if they've been recommended them

> "I have some friends that, they might recommend and I enjoy, such as the Quinto do Soalheiro from Alentejo, it's a very, very good red wine."
> *Occasional Treater, Female*

Brands you might find them drinking

MonteVelho

ALANDRA

BODEGAS VIÑA SOMOZA

VALLADO

TERRAS DE LAVA

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

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

OCCASIONAL TREATERS: WINE IN OFF-TRADE AND ON-TRADE

Willing to pay a bit more for quality wines; buys wine from supermarket where both value and quality can be guaranteed

Where and how do they buy wine?

- **Almost exclusively shop in larger supermarkets.** They like the varied selection in the larger wine sections and are sure they will find a quality bottle within them.
- Have attempted more specialist wine stores but **feel like they don't have enough knowledge to make an informed decision**.
- Have attempted online buying but **only do so if they're buying brands they know already.** They would rather go to their nearest store and pick bottles up in person.

Places you might find them buying wine

Wine in the on-trade

- They are **infrequent drinkers in the on-trade**, when they do drink it is most likely to be a more formal occasion or for celebrations with friends and family.
- **Buying wine in the on-trade overwhelms them** as they don't know very many wine types, so if their usual isn't on the menu, they're unsure of where to go next.
- When a choice isn't obvious, **they reach out to sommeliers to recommend something** similar to what they usually go for or something that pairs with their meal.

> "Obviously price is always a thing. I tend to look at familiar names and look for something that I know of, or have experienced that is a fairly good price."
> *Occasional Treater, Female*

> "When I want to buy wine I tend to go to bigger supermarkets where they have a dedicated wine section. I've also ordered some online from some producers that I know."
> *Occasional Treater, Female*

(%): All Portuguese RWD
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Wine Intelligence, consumer interviews

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Qualitative methodology

KITCHEN CASUALS

WHOIS THE TYPICAL KC

- Oldest, lower-income, 'Empty Nesters', only drinking wine at home and rarely drinking in the on-trade

RELATIONSHIP WITH WINE

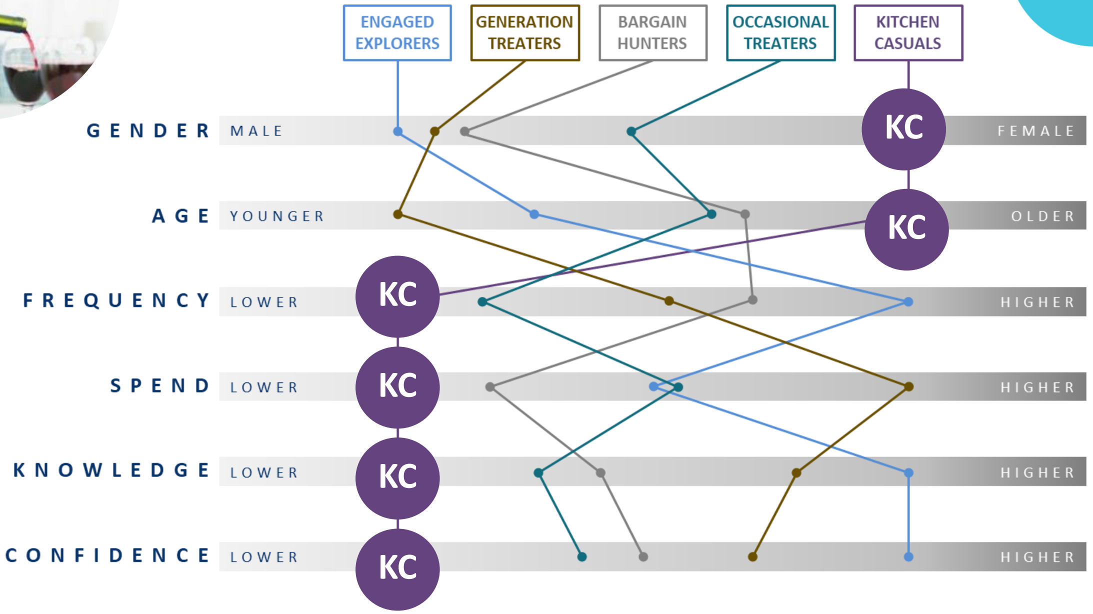
- **Drink wine infrequently** – When they do drink, it is mainly to accompany meals at home.
- **Least knowledgeable** and least involved in the wine category
- **Uninvolved –** stick to the wines and brands they know and like

HOW TO ENGAGE THEM WITH WINE

- **Off-trade specialists** – rarely will they purchase wine in the on-trade and will typically be drinking their wine at home
- **Price point** – they look for wine that they feel is reasonably priced
- **Brand-centric** – when making purchasing decisions they stick with the brands that they have tried and trust

KEY CHALLENGE FOR WINE BRANDS

- **Conservative buyers** – are loyal to the brands that they already know and tend not to venture beyond them



WHERE YOU MIGHT FIND THEM BUYING

CONTINENTE

pingo doce

LIDL

WHAT YOU MIGHT FIND THEM DRINKING

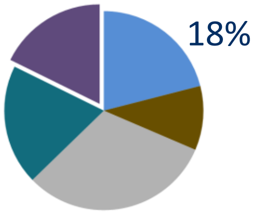
PLANALTO

CABRIZ

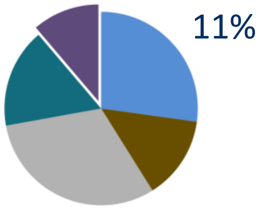
MURALHAS

KITCHEN CASUALS: PROPORTION OF WINE DRINKERS, VOLUME AND SPEND ON WINE

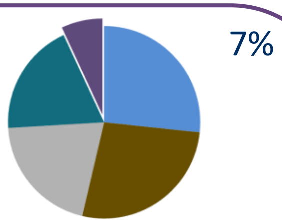
Kitchen Casuals are the **least frequent drinkers and lowest spending segment.** They account for the **lowest proportions of volume and value** in the Portuguese wine market. They are not very knowledge about, confident in, or involved with the wine category.



Share of regular wine drinkers **population**



Share of total **volume** of wine sold in Portugal

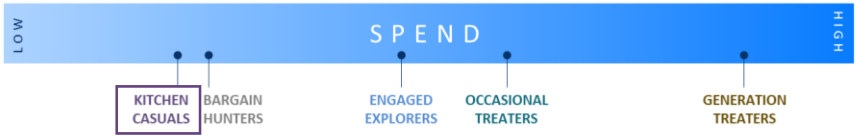


Share of total **spend** on wine in the Portugal

Off-trade	12%	8%
On-trade	9%	6%

Wine consumption frequency (off-trade)

Typical spend per bottle of wine (off-trade)



Wine consumption frequency (on-trade)

Typical spend per bottle of wine (on-trade)

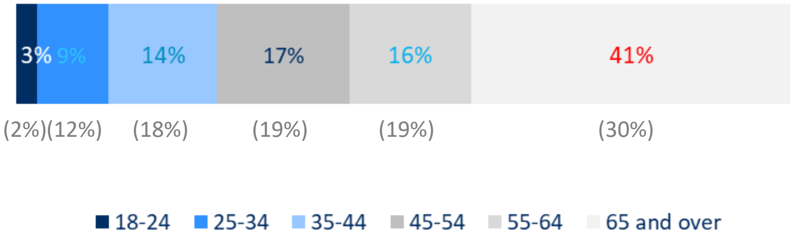
Source: Wine Intelligence, Vinitrac® Portugal, July 2020, October 2020, March 2021 and June 2021 (n=4,100) Portuguese regular wine drinkers

KITCHEN CASUALS: WHO ARE THEY?

Who are Kitchen Casuals?

- Highest female-bias of all segments (59% vs 47%)
- Oldest group of consumers, with over half aged 55 and older
- Lowest monthly personal income of all segments
- Fewer live in Lisbon and more live in Setúbal compared with all Portuguese consumers
- Fewer live with children; likely Empty Nesters given their age

Age



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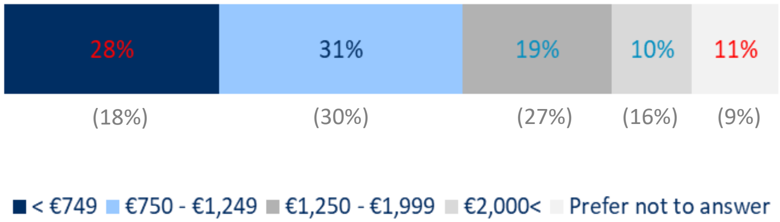
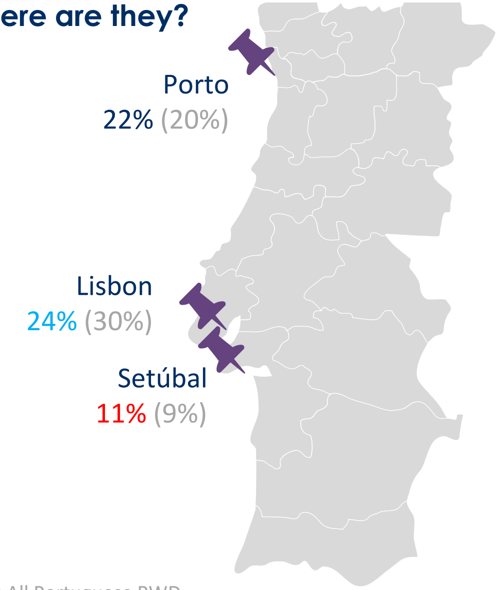
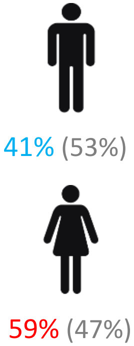


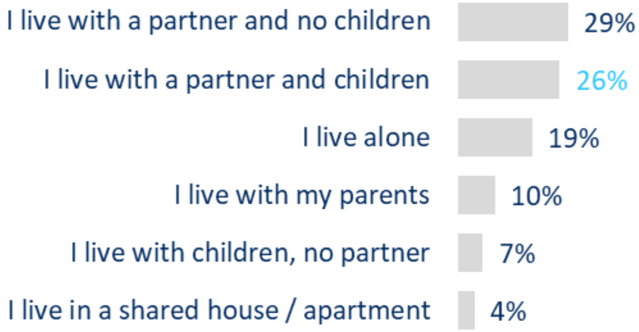
Where are they?



Gender



Who do they live with?



(%): All Portuguese RWD

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KITCHEN CASUALS: ENGAGEMENT AND REPERTOIRE

Least involved, lowest-spending segment that shops for the same brands during their weekly grocery shop

Engagement and where they buy wine

- **Most often drink wine with meals** at home and in restaurants.
- **Very uninvolved with the wine category**. They have the lowest category knowledge and confidence of all segments, and the majority like sticking to the wine types they know.
- **Tend to buy wine in supermarkets** along with their regular grocery trips.
- They have tried to buy wine in more specialised stores but **feel out of place there as they don't know enough to make informed decisions.**
- Very reluctant to buy online.

What do they drink

- **Limited repertoire** of alcoholic beverages.
- **Wine is their most often consumed beverage**, along with beer and a few spirits.
- Price is their key choice cue when buying wine.
- Tend to buy the **same handful of brands repeatedly** as a result of their low category knowledge and hesitation to expand beyond their tried and trusted repertoires.

> "I mostly stick with the brands that I know. I have some that I like and try to taste the different bottles they have to offer.
> *Kitchen Casual, Male*

Places you might find them buying wine

CONTINENTE

pingo doce

LIDL

Brands you might find them drinking

PAPA FIGOS

EA

PLANALTO

CABRIZ

MURALHAS

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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

RESEARCH METHODOLOGY: QUALITITATIVE

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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