



# Australia Portraits 2019



# Introduction

With over half of the adult population in Australia drinking wine at least once per month, trying to decipher trends and patterns of behaviour en masse does represent a challenge. We know that there are different types of wine consumers, from the highly involved to the casual drinker. Amongst Australian drinkers, when they are grouped into segments based on their behaviour and attitude towards wine, 6 distinct segments emerge: Engaged Explorers, Social Newbies, Mainstream Matures, Contented Treaters, Senior Bargain Hunters and Kitchen Causals.

For those familiar with Australian Portraits, you may notice differences to the segments that were identified in 2016. Just as wine markets are evolving over time, so are our consumers. Some of these shifts are more noticeable than others, but collectively, the changes are enough to lead to an evolution of the wine drinker segments.

Our first updated segment, 'Mainstream Matures' has the highest level of involvement, knowledge and confidence in the wine category compared to all other segments. This is gained through years of experience of wine drinking, with a high proportion of them aged over 45. Wine is part of their daily routine and between them, they consume 24% of the volume of wine enjoyed in Australia.

With their high levels of involvement and confidence, 'Engaged Explorers' are younger, exploratory wine drinkers that see wine as a key part of their lifestyle, especially in social occasions. They are eagerly still discovering the world of wine, and spend 28% of the total \$ spent on wine in Australia, driven by the high frequency and higher per bottle spend.

## Introduction (cont.)

The youngest segment, ‘Social Newbies’, are yet to build their knowledge of wine, with this being directly related to their younger age and therefore less experience with wine. They are eager to build their knowledge, and with fewer pre-conceptions about wine, are open to trialling from a broad repertoire of varietals, brands and places of origin.

‘Contented Treaters’ enjoy wine, but it is not a primary part of their lifestyle and they enjoy drinking it mostly in social occasions. They have a reasonable knowledge of the category, especially when it comes to matching wine and food, but will seek advice when needed or default to higher prices as they tend to see this as a guarantee for quality.

‘Senior Bargain Hunters’ represent the largest group of wine drinkers by population, and have a high proportion of wine drinkers aged over 55. They have gained a reasonable level of knowledge through their experience in the category, but they show little interest in moving beyond their established repertoire of favourites.

‘Kitchen Casuals’ are the lowest spending, lowest volume and least frequent wine drinkers, showing low interest in the category. They have a limited knowledge of wine and show loyalty to mainstream brands, thus sticking to what they know, being driven by a price-sensitive attitude.



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# Contents page



- Introduction p. 2
- How Portraits works p. 5
- Meet Australia Portraits 2019 & changes since 2016 p. 8
- Australia Portraits 2019
  - Engaged Explorers p. 25
  - Social Newbies p. 39
  - Mainstream Matures p. 51
  - Contented Treaters p. 64
  - Senior Bargain Hunters p. 74
  - Kitchen Casuals p. 81
- Methodology & Appendix p. 89

# How Portraits works

## What are Portraits?

- Portraits are a series of reports designed by Wine Intelligence to provide wine businesses with a reference segmentation model of wine drinkers which can be applied to individual brands, regions, countries of origin, style categories and retailers
- Portraits are detailed in a full PDF report and supporting Excel data table
- Australia Portraits 2019 is the third published edition of our Australia Portraits. Portraits is also available for the UK, China, the US and Canada

## How we make Portraits...

- Wine Intelligence uses factor and cluster analysis to group consumers into distinct segments, based on their answers to questions about their wine-drinking behaviour and their attitude towards wine. Once consumers have been identified as belonging to a specific segment, these segments are profiled based on a set of output variables, which in addition to the input variables above, include demographic information and more detailed questions on wine-drinking behaviour
- Portraits are based on an integrated research methodology utilising both quantitative and qualitative techniques
  - **Quantitative:** Analysis for Australia Portraits is based on a sample of 4,000 Australian regular wine drinkers collected in July and October 2018 via Wine Intelligence's Vinitrac® online survey. Comparisons for some measures were made against the previous Australia Portraits 2016
  - **Qualitative:** Depth interviews were conducted across Australia in January and February 2019 (see Appendix for details of the qualitative research methodology)

# How can I use Portraits?

## Objectives

The Portraits report series has two main objectives:

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

This report identifies the higher value, mid-value and lower value consumer groups in the wine market, and provides detail on the preferences and behaviours of each segment in order to help you to identify the right target group for your product. This analysis can then be combined with an analysis of the competitive landscape to build a decision of which consumers to target

The segmentation model can be used to identify and understand target consumers, and to map on to brand, portfolio and channel strategies. Reading the report, it is important to note that each consumer group has its own needs and merits. Higher value consumers may offer a tempting target because they tend to buy more expensive wines more frequently; on the other hand they tend to have broad portfolios and the competition for their attention is intense. Lower value consumers may shop for wine less often and spend less, but can still represent significant opportunities for producers whose strengths align with lower cost, consumer-friendly products

## Putting findings into practice

Once you have decided on your target and built an understanding of who these consumers are, there are a number of ways to apply this understanding to better target your key customers. In the past, wine companies have used Portraits to inform:

- Packaging and label design
- Brand positioning
- Advertising and marketing communications
- Channel strategy
- In-store positioning and layout

# Contents page



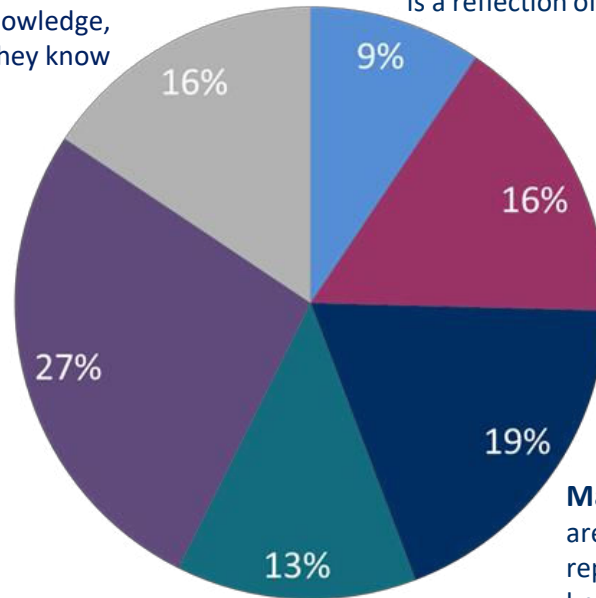
- Introduction p. 2
- How Portraits works p. 5
- Meet Australia Portraits 2019 & changes since 2016 p. 8
- Australia Portraits 2019
  - Engaged Explorers p. 25
  - Social Newbies p. 39
  - Mainstream Matures p. 51
  - Contented Treaters p. 64
  - Senior Bargain Hunters p. 74
  - Kitchen Casuals p. 81
- Methodology & Appendix p. 89

# Australian Portraits: New segmentation for 2019

% Share of Australian regular wine drinkers by Portraits segments

**Kitchen Casuals:** A majority are aged over 45 years old, while drinking wine infrequently and almost exclusively at home. They have the lowest overall spend on wine and demonstrate limited knowledge, tending to stick to what they know

**Engaged Explorers:** One of the younger segments, typically under 44 years, with a higher proportion of men. They are the most frequent wine drinkers and the highest spenders, buying from a broad repertoire of wine styles, countries and regions. With a high level of confidence yet mid-level knowledge of wine, which is a reflection of their relatively shorter time as wine drinkers



**Social Newbies:** Youngest segment with majority of wine drinkers under 35 years old and a higher proportion of men. They are more likely to drink wine in the on-premise or in a social setting. Their limited experience means they have less knowledge of wine and are more likely to ask for recommendations from friends and family when choosing wine

**Senior Bargain Hunters:** One of the oldest wine drinking segments with a small share of total spend. Time in the category has led to relatively strong wine knowledge, but low involvement. However, they still purchase from a narrow repertoire of wine styles and brands, being strongly value driven

**Mainstream Matures:** A majority of people in this group are aged over 45 with equal male and female representation. They demonstrate the highest levels of knowledge, involvement and confidence of all segments in the wine category and are very value driven wine consumers

**Contented Treaters:** Aged between 24 to 44 years old and skewed female, with reasonable levels of wine knowledge, involvement and willingness to spend more per bottle of wine. Their low levels of wine consumption frequency leads to low levels of confidence

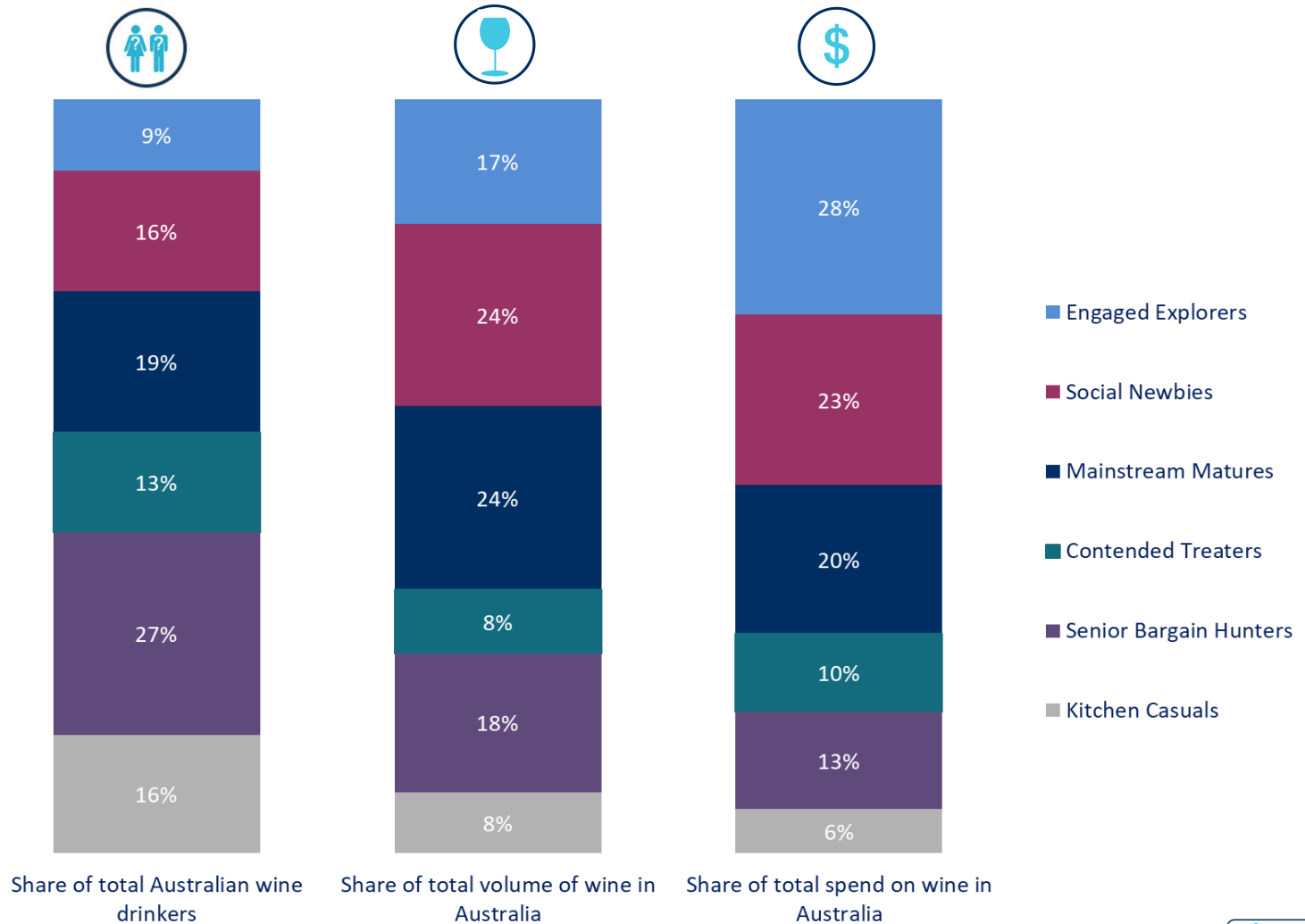


# Australia Portraits market sizing

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

Proportion represented by each segment, with consumption and spend estimated based on recalled usage frequency and spend data

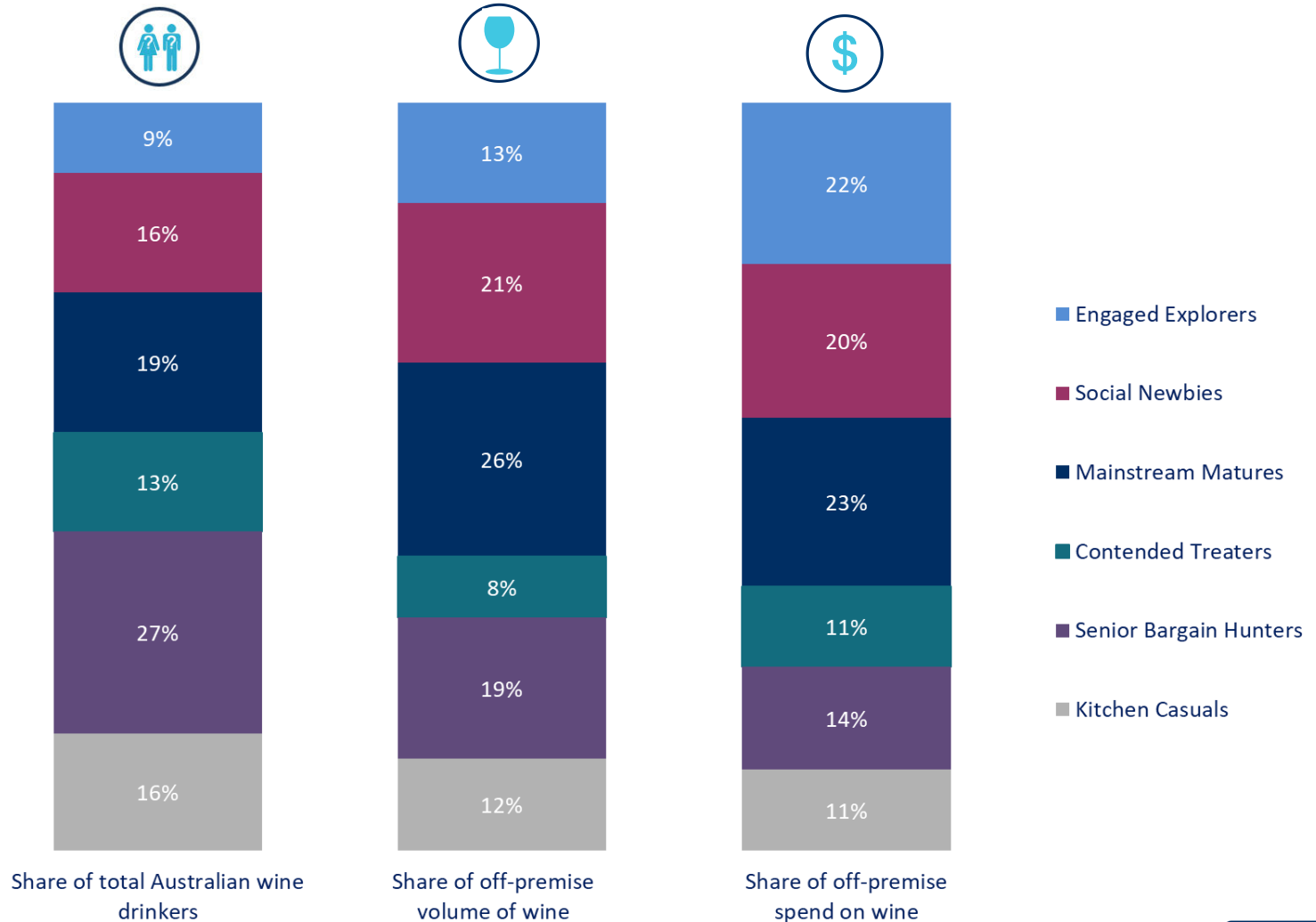
Base = All AUS regular wine drinkers



# Australia Portraits market sizing: Off-premise

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

Proportion represented by each segment, with consumption and spend estimated based on recalled usage frequency and spend data  
 Base = All AUS regular wine drinkers

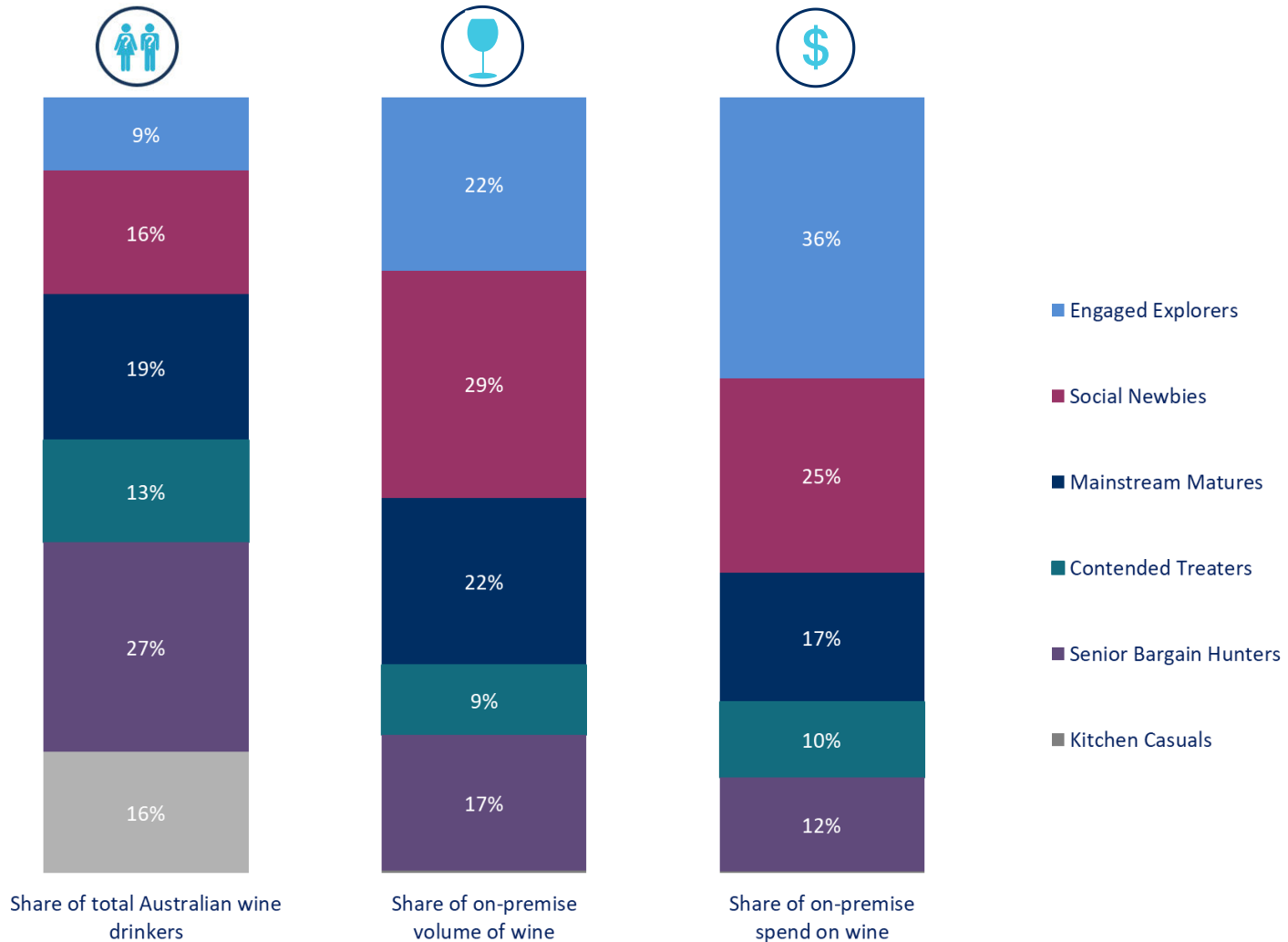


# Australia Portraits market sizing: On-premise

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

Proportion represented by each segment, with consumption and spend estimated based on recalled usage frequency and spend data

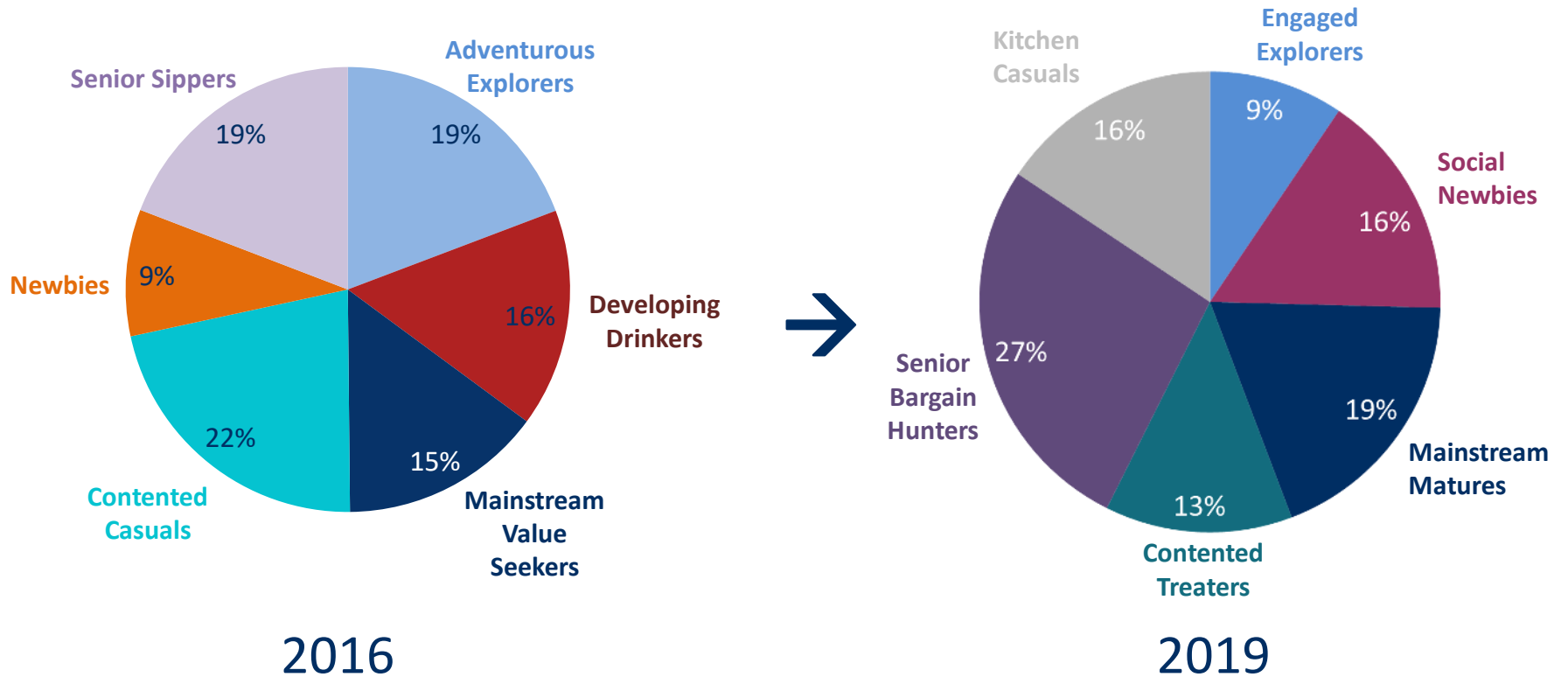
Base = All AUS regular wine drinkers



# Australia Portraits: 2016 → 2019

Most segments have changed their constituent behaviour, prompting new names and proportional shares of the wine drinking population

% Share of Australian regular wine drinkers by Portraits segments



# 2016 - 2019: New segment Engaged Explorers

The highest involved segment has become proportionally smaller, younger and is spending more on wine

## Where are they coming from?

### Adventurous Explorers:

- High spending consumers who are confident in, and adventurous with, their wine choice
- Two thirds are aged between 25 and 45
- Wine is a regular treat for them, and is important to their social life
- They drink from a broad repertoire and enjoy trying new wines from a number of different counties and regions

### What's changed?

- Overall smaller proportion of wine drinkers
- Drinking more frequently but spending more per bottle

## New Segment: Engaged Explorers

### Who are they?

- **Younger drinkers:** second youngest segment with majority aged under 45
- Wine is an active and important part of their lifestyle and they demonstrate a strong interest towards the category
- Second most **involved and confident** group with the highest wine consumption frequency
- **Most frequent and highest spending** segment, especially in the on-premise. They are the smallest segment in terms of the number of drinkers, but make up 28% of the total spend in Australia and 36% of spend in the on-premise
- **Interested in learning more** about the wine category and therefore enjoy getting recommendations from shop staff or waiters in restaurants
- **Eager to explore the category** beyond the more mainstream varietals or countries and regions of origin

# 2016 - 2019: New segment Social Newbies

Adventurous Explorers and Developing Drinkers make up the majority of the new Social Newbies segment, who are drinking wine frequently, especially in the on-premise, and enjoy discovering wine

## Where are they coming from?

### Adventurous Explorers:

- Drink from a broad range of countries of origin and varietals
- High spending segment
- Most likely to be drinking wine in the on-premise

### Developing Drinkers:

- Interested in wine and wish to build their knowledge, but lack confidence. Wine is an important part of their social lives and is viewed as sophisticated
- Limited awareness of brands and regions

### What's changed?

- Slightly younger group with less aged between 35-44
- Higher level of involvement with higher levels of confidence, driving more exploration in the category

## New Segment: Social Newbies

### Who are they?

- **Youngest** wine drinking segment with 66% aged under 35
- Wine is often **consumed in the on-premise** and in social situations with friends or family
- High proportion of consumers enjoy different styles of wine on a regular basis, but have the **lowest knowledge**
- They account for **a quarter of the spend** of on-premise wine and a similar proportion of the total spend of wine in Australia
- **Less experience** in the category and are more likely to use social media and apps to find wine information
- Will gravitate towards familiar regions and will choose varietals accordingly

# 2016 - 2019: Mainstream Matures

Older more experienced wine drinkers with a high knowledge and narrower repertoire

## Where are they coming from?

### Contented Casuals:

- Drinking wine gives them pleasure and they enjoy trying new and different styles of wines

### Mainstream Value Seekers:

- Older, very frequent wine drinkers who have a high level of wine involvement and knowledge
- Wine is seen as an everyday treat and a way to relax at the end of the day. They view the core, well-known brands as reliable and trustworthy

### Adventurous Explorers

- Drink wine almost everyday, they are confident in their knowledge and wine is important to their lifestyle

### What's changed?

- Age profile has broadened for 35-44 year olds
- Years of experience in the wine category helps fuel knowledge and confidence

## New Segment: Mainstream Matures

### Who are they?

- **Older group** with a significantly higher proportion of drinkers over the age of 45
- **Frequent drinkers** with highest levels of knowledge, involvement and confidence in wine built through category experience over many years
- Represent almost a **quarter of the share of total wine volume consumption**
- Drinking is a part of their everyday routine to relax at the end of the day with a meal
- Brands are a handy short-cut to trust and quality, especially when assessing value for money
- Enjoy trying new and different styles of wine and **explore within varietals** they are familiar with or may be tempted by a promotional offer

# 2016 - 2019: New segment Contented Treaters

Drawn from a range of previous segments, this new group is drinking wine relatively less frequently, whilst having a higher per bottle spend and being very knowledgeable in the category due to their experience

## Where are they coming from?

### Developing Drinkers:

- Interested in wine, however, lack confidence

### Contented Casuais:

- Some knowledge, but don't actively seek out additional information
- Know what they like and stick to "safe choices" of brands and varietals

### Newbies:

- Less frequent drinkers and female skewed. They like to share wine with friends, especially in restaurants

### What's changed?

- Drinking more frequently and slightly lower levels of involvement and confidence
- Spend per bottle is significantly higher

## New Segment: Contented Treaters

### Who are they?

- Less frequent wine drinkers with a female skew** from across the age spectrum
- High spending per bottle** in both on- and off-premise
- They have a **fairly good wine knowledge** and feel that they know what they like, but still lack confidence and seek reassurance. As a result, they are **likely to spend more** to avoid embarrassment
- Not very focused on brands**, basing their choice rather on recommendations or taste descriptors
- Enjoy wine from a **narrow repertoire**
- Enjoy **pairing their wine with food** and are keen to ask staff or waiters in the on-premise to explore new wines



## 2016 - 2019: New segment Senior Bargain Hunters

The largest segment in terms of the number of drinkers, with the lowest spend, infrequently drinking wine despite it being their primary drink of choice

### Where are they coming from?

#### Senior Sippers:

- Older wine drinkers, typically low wine involvement and knowledge
- Less likely to drink wine in on-premise
- Driven by low prices, buy domestically and tend to stick to what they know
- Less likely to drink other alcoholic beverages

#### What's changed?

- Higher proportion of females, drinking wine slightly more frequently, especially off-premise
- Lower levels of awareness of places of origin and brands

### New Segment: Senior Bargain Hunters

#### Who are they?

- **Largest segment** representing more than a quarter of the wine drinking population in Australia. However, they are infrequent drinkers and overall volume is the third highest
- Price conscious and one of the **lowest spending groups**, representing only a small share of the total spend on wine
- Lack confidence and feel other people know more about wine
- One of the **oldest segments**, with a majority aged 55+ and a female skew
- Reluctant to experiment with different styles or wine, sticking to what they know, leading to a lack of experience in the wine category
- Price sensitive and **drink infrequently in the on-premise**

# 2016 - 2019: New segment Kitchen Casuals

Kitchen Casuals are older, low spending consumers who rarely drink in the on-premise

## Where are they coming from?

### Senior sippers:

- Older wine drinkers, often retired, typically with low wine involvement and knowledge
- Drink wine as an affordable choice for relaxing at home
- Unadventurous and driven by low prices, often not minding what they buy so long as the price is right
- Preference for wine from domestic regions of origin, often purchasing Australian wines

## New Segment: Kitchen Casuals

### Who are they?

- **Smaller, older segment that is skewed male** – majority aged 45 and over and a higher proportion are aged over 65
- **Low spending segment especially in the on-premise.** They have limited knowledge and interest in wine, contributing to their low spend
- Wine is usually their drink of choice, but few drink in the on-premise
- Low consumption of the most popular varietals
- Less likely to be aware of or purchase from countries of origin outside of Australia

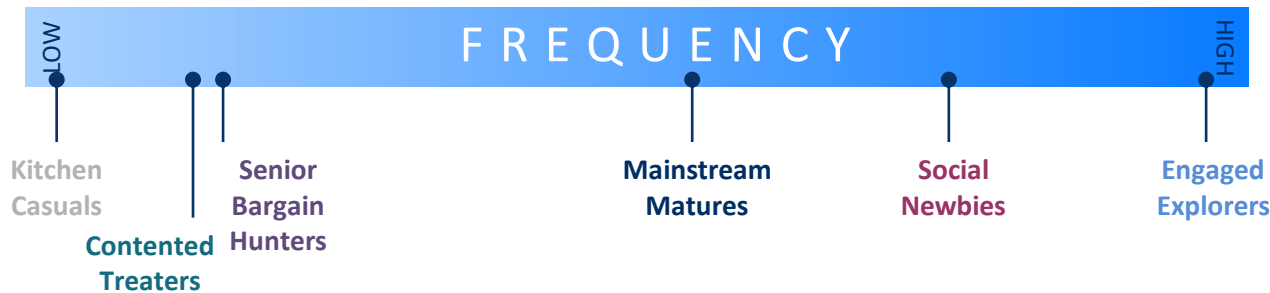
### What's changed?

- Broadening age within the group coming with more wine drinkers aged 35-54 than previously
- Skewed male with a slightly lower income
- Relatively higher levels of knowledge

# Introducing the Portraits groups: Overview

Mapping wine drinking frequency shows two distinct clusters of low and high frequency drinkers, which is not directly correlated to typical per bottle spend on wine

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



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



# Introducing the Portraits groups: Overview

Category involvement shows two distinct clusters, while knowledge and confidence are more influenced by a cumulation of experience built up over a number of years of wine drinking

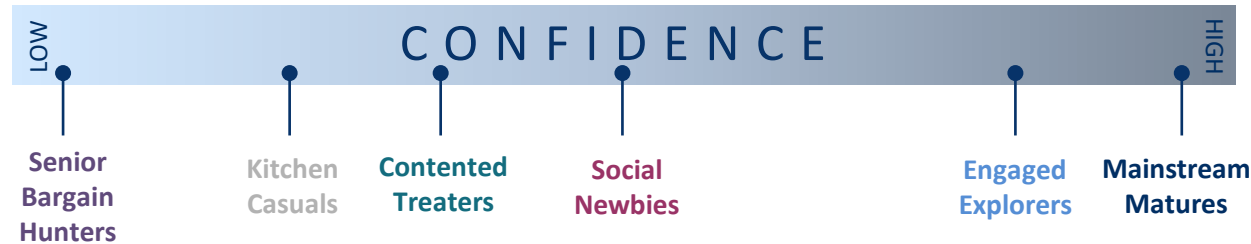
## Involvement in the wine category



## Knowledge level

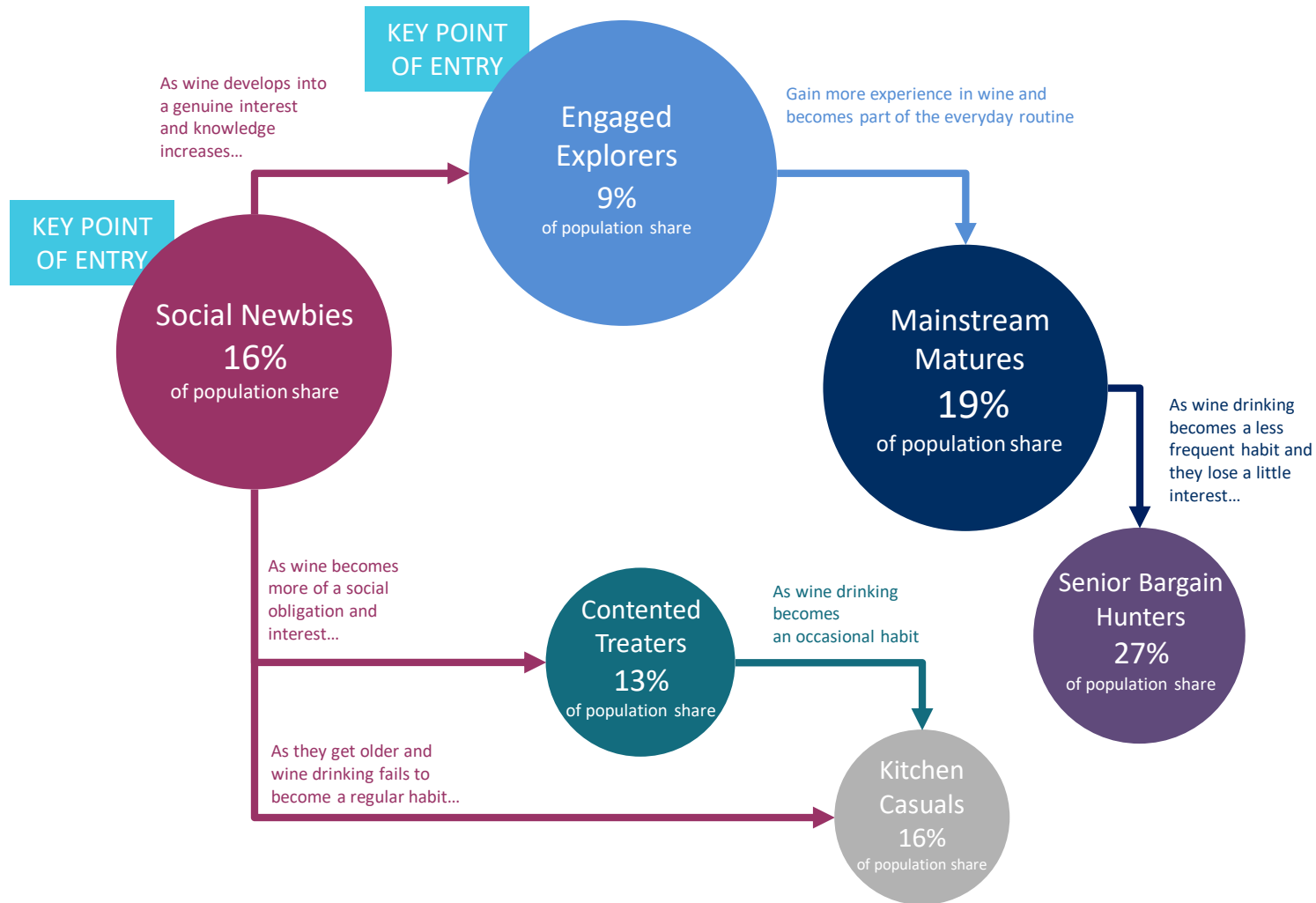


## Confidence level



# Introducing the Portraits groups: Segment migrations

As wine drinkers progress through life and their interests and priorities evolve, they tend to migrate between segments in a consistent pattern



Value to the industry\*

# Introducing the Portraits groups: Motivations

Expressing the consumer relationship with wine through need states illustrates that a stronger emotional connection with wine leads to both a higher spend and frequency of wine consumption

## Rational

### Functional motivations

Dominant for

Related to the practical side of consuming wine. Examples include:

- Enjoying the taste
- Alcoholic effect
- Appropriate choice for different occasions
- Value for money

Senior Bargain Hunters  
18% of total wine spend

Kitchen Casuals  
6% of total wine spend

Social Newbies  
23% of total wine spend

## Emotional

### Personal motivations

Dominant for

Related to what wine means to the individual. Examples include:

- Keen to learn and experience quality wines
- Drinking more expensive beverages signifies personal achievement

Engaged Explorers  
28% of total wine spend

Mainstream Matures  
20% of total wine spend

### Mood-enhancing motivations

Dominant for

Related to the atmosphere that consuming wine helps to create. Examples include:

- A way to relax
- Enhances food
- Association with travel and cultural experiences
- Comfort in the familiar

Contented Treaters  
10% of total wine spend

Mainstream Matures  
20% of total wine spend

Engaged Explorers  
28% of total wine spend

### Social motivations

Related to what wine signals to other people. Examples include:

- Socialising with family and friends
- Personal status
- Opportunity to recommend to others
- Conforming to the social norm at specific occasions
- Drinking as an event

Dominant for

Engaged Explorers  
28% of total wine spend

Social Newbies  
23% of total wine spend

Contented Treaters  
10% of total wine spend

Mainstream Matures  
20% of total wine spend

# Australian Portraits overview: Summary of segment attributes



	Engaged Explorers	Social Newbies	Mainstream Matures	Contented Treaters	Senior Bargain Hungers	Kitchen Casuals
Who are they?	Younger, confident wine drinkers who enjoy discovering new wines	One of the youngest segments, drinking fairly frequently, their low knowledge is driven by less years of experience in the category	Mid to older aged, frequent wine drinkers, value driven but very knowledgeable	Infrequent, but have a higher than average spend per bottle and often use price as a proxy for quality	Most infrequent and one of the oldest segments with good knowledge due to a long time in the category	One of the oldest, very infrequently drinking segments. They have little interest in the category
Why do they drink wine?	Wine is part of their lifestyle and social life so they spend time and money in the category	Wine is often consumed in the on-premise and in social situations with friends and family	Drinking wine is part of their daily routine and frequently enjoy wine in both off- and on-premise occasions	They have wine infrequently but enjoy it in social situations as a treat or to pair with their dinner	Lowest confidence in their knowledge. Wine drinking centers around casual occasions at home	Do not understand much about wine and have little interest to learn more. They mostly drink at home for informal occasions
Where?	Enjoy buying from local bottle shops and wineries, and are not particularly motivated by promotional offers	Main factor when buying wine is convenience, so many wine-buying channels are used	Get wine from a broad range of channels that offer a familiar range as well as promotional offers	They buy wine from the local bottle shop or from wineries they visit to stock up	Most consumers get their wine from the supermarket attached liquor store or local bottle shops	Very price-conscious. Their primary channel is the supermarket attached liquor stores
What do they drink?	Have the broadest repertoire and enjoy trying new varietals, regions and types of wine	They are exploring the category and enjoy trying more niche varietals and regions of origin	Confident and comfortable with their knowledge, varietals and places of origin, and are happy to explore within this repertoire	Rely heavily on their knowledge of grape variety when buying wine and less reliance on places of origin and brand	Drink more white wine than red, have good knowledge of varietals and places of origin, but tend to drink from a narrow repertoire	Drink from a very narrow repertoire and stick to what they know

# Contents page

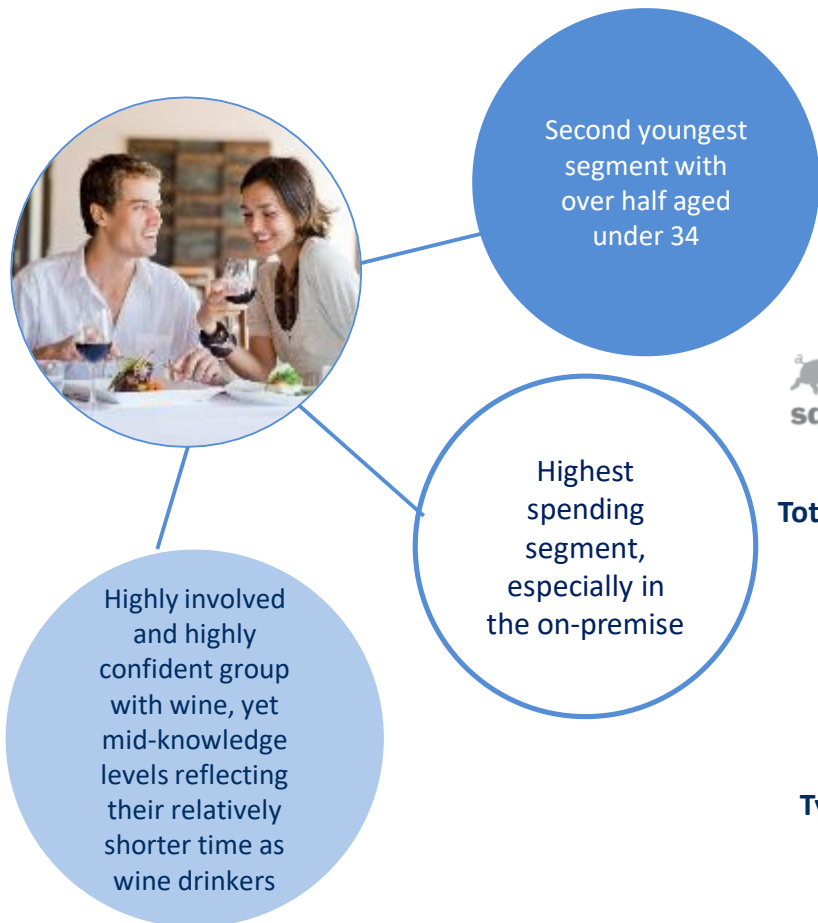


- Introduction p. 2
- How Portraits works p. 5
- Meet Australia Portraits 2019 & changes since 2016 p. 8
- Australia Portraits 2019
  - Engaged Explorers p. 25
  - Social Newbies p. 39
  - Mainstream Matures p. 51
  - Contented Treaters p. 64
  - Senior Bargain Hunters p. 74
  - Kitchen Casuals p. 81
- Methodology & Appendix p. 89



# Engaged Explorers: Overview

One of the younger segments, they are both the most frequent wine drinkers and the highest spenders per bottle / glass, drinking from a broad repertoire of wine styles, countries and regions



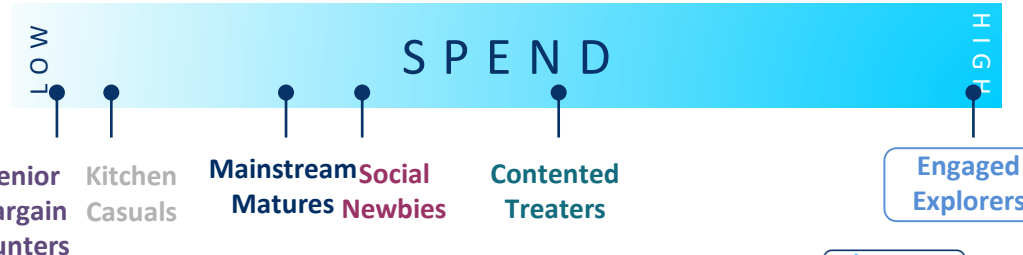
Brands you might find them drinking include:



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



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

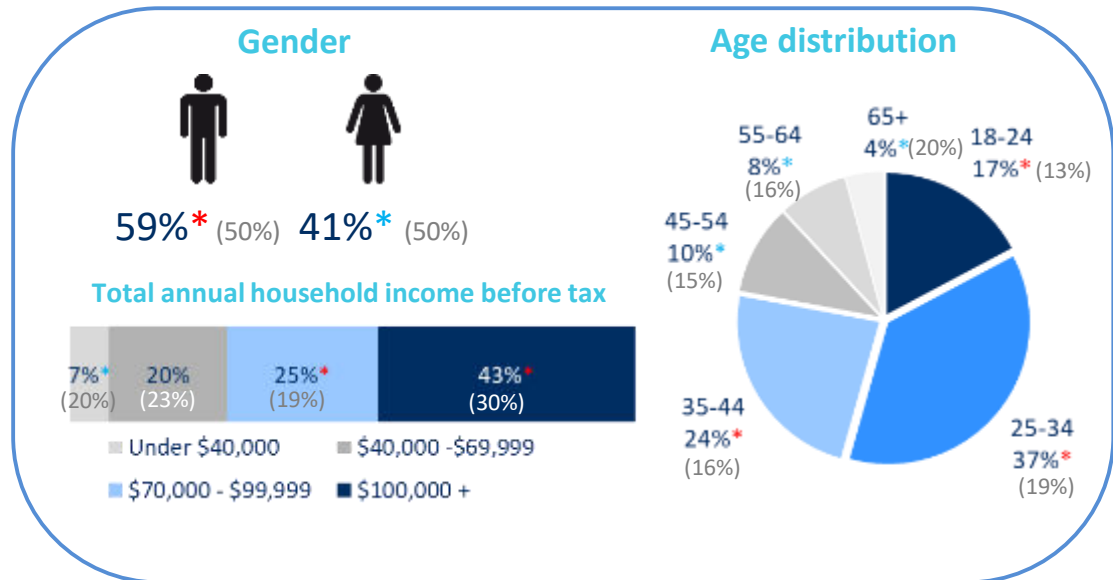
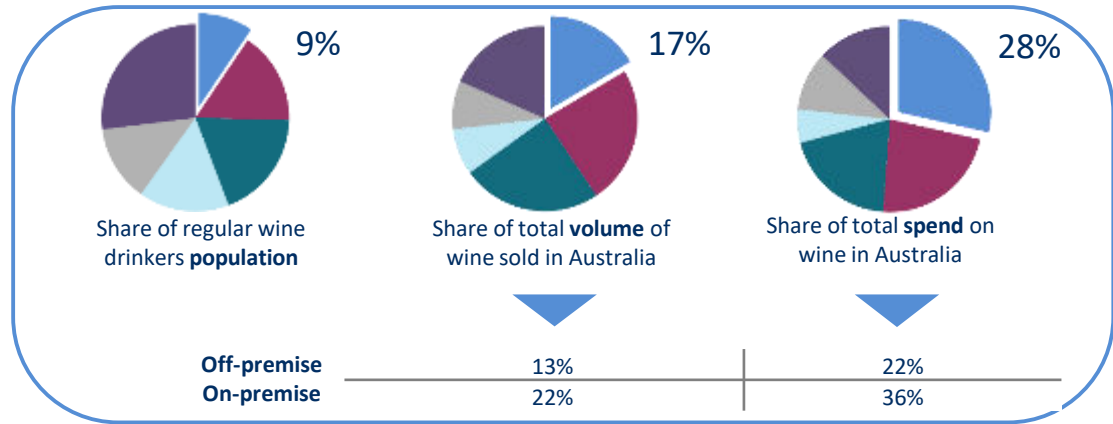


# Engaged Explorers: Profile

Younger, higher income drinkers, with a high proportion being men, often living in urban areas, who have the highest per bottle / glass spend on wine

## What you need to know

- **Male skewed:** A significantly higher proportion of men in this segment
- **Younger drinkers:** One of the younger segments, typically aged under 44
- **Urban professional:** Often city-based and in higher paying professional jobs
- **Highest spending segment on wine, especially in the on-premise.** Despite being the smallest segment in terms of share of population (9% of regular wine drinkers), they account for 28% of the total spend on wine in the Australia and 36% of spend in the on-premise



( ) All AUS regular wine drinkers

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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

# Engaged Explorers: Wine involvement

Wine is an important part of the lifestyle of this highly involved segment, they actively explore new and different styles of wine on a regular basis



## Highly involved in the wine category

- Wine is an active and important part of an Engaged Explorers' lifestyles, and they demonstrate a strong interest in the category
- While wine is usually their alcoholic beverage of choice for most occasions, they also demonstrate exploration in other beverage categories. They have a broad beverage repertoire which includes Craft Beer, Vodka, Whisky and Champagne
- Compared to other segments, this segment has the highest proportion of consumers who enjoy trying new and different styles of wine on a regular basis



## Top 5 alcoholic beverages: Past 12 months

% who drink the following alcoholic beverages

Red wine	90%* (79%)
White wine	77% (80%)
Beer	75%* (66%)
Vodka	57%* (38%)
Champagne (French Champagne)	56%* (29%)

Involvement in the wine category



Every time I go out for a drink, I probably try to get a glass of wine at least once during the night. It is my first choice of alcoholic beverage when I'm drinking away from the home  
*Male, 35-39*

I'm part of a tasting group. They are all blind tastings, so the information is given back to us and there are a lot of new wines, some of them we know but rarely, so it's more a discovery of wine situation  
*Female, 35-39*

I like a lot of different styles of wine and I actively like to try different styles and different varieties regularly. If something comes up, like if there's an Italian or French wine that I haven't tried, something different, I will try it  
*Male, 40-44*

( ) All AUS regular wine drinkers

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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

Wine Intelligence consumer interview programme, see appendix

# Engaged Explorers: Wine knowledge

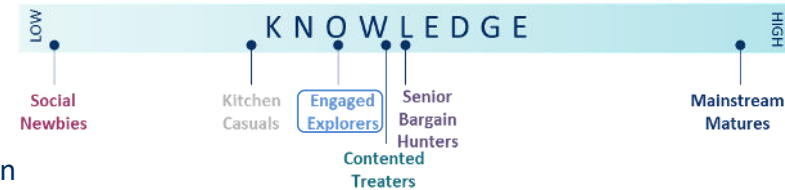
Although highly involved with wine, their wine knowledge levels are relatively lower, driven by their younger age and therefore less years of experience with wine



## Building wine knowledge through trusted recommendations

- They are open and willing to build their wine knowledge, typically utilising an informal approach to gathering this information, exploiting opportunities when they arise. They make the most of conversations with friends or family and will gladly ask questions from knowledgeable staff in stores and restaurants
- They undertake their own information gathering when the need arises and they are searching for something in particular. A higher proportion of consumers in this segment base their wine choice on the recommendations of wine critics or wine guide books
- They are often well-travelled and often buy wine from wineries they have visited, where they have the chance to learn about the winemaking and the story behind the wine
- This segment enjoys asking knowledgeable shop staff for recommendations and takes this opportunity to learn more about wine, restricting this to shops where they believe the staff will have sufficient knowledge
- When looking at wine lists, they look for countries / regions and varietals that they recognise, and are keen to ask sommeliers / waiters for recommendations about food and wine pairing

Knowledge level



I look on Google and we have a couple of books at home on wine so we have a search through those if we are looking for further information on particular wines  
*Male, 35-39*

What I generally do is if I like a wine or if it's interesting I'll look it up on their Instagram page and their social media  
*Female, 25-29*

If there's an article in the paper about wine or if I'm on a plane and it's got an article in the airline magazine, I might flip through the article  
*Male, 40-44*

I started off on my wine journey in Australia and the Hunter Region, then the Barossa Valley and Margaret River, but over time I've decided to explore more of the European side  
*Male, 35-39*

# Engaged Explorers: Confidence with wine

Engaged Explorers have high levels of confidence with wine



## Confidence in abundance

- Overall level of confidence for Engaged Explorers is ranked second highest. What this segment lacks in depth of knowledge is made up for in confidence, as they feel competent about their wine knowledge and make use of it to drive their choices
- They are typically the person in a group who chooses the wine when going out with friends as they are typically confident in their knowledge
- Members of this segment are aware of label design but value it less than other choice cues like grape variety or country or region of origin. However, unappealing designs are still more likely to push Engaged Explorers away from purchasing
- Region and varietal are of high importance to this group and they place less emphasis on brand in their wine choices

Confidence level



I like Riesling from Germany but I also drink Australian versions from the Clare Valley. For Pinot Noir, I live in Geelong so I enjoy local producers, but I also enjoy wines from Mornington Peninsula as well  
*Female, 35-39*

I guess when I'm in a retail shop, not a cellar door, label design would impact me. But mostly, I'm looking for labels I don't hate. I like something a bit more modern looking and simplistic with less writing  
*Female, 25-29*

Sometimes I listen to the sommelier for recommendations in good restaurants but quite often I pick it myself because I know what I like  
*Male, 40-44*

# Engaged Explorers: What wine do they drink?

Their high level of involvement with wine extends to them choosing from the broadest range of wine types and styles



## High wine involvement and interest leads to a broad repertoire

- This segment has the highest proportion of rosé wine drinkers versus any other segment as well as a higher proportion drinking Champagne, Prosecco and other sparkling wines, but many still restrict sparkling to more special occasions
- Compared to other segments, they drink from a wider range of varietals, which is in alignment with their openness to explore the category. A higher proportion of drinkers in this segment consume varietals that are consumed by fewer drinkers from other segments such as Sangiovese, Gamay or Vermentino

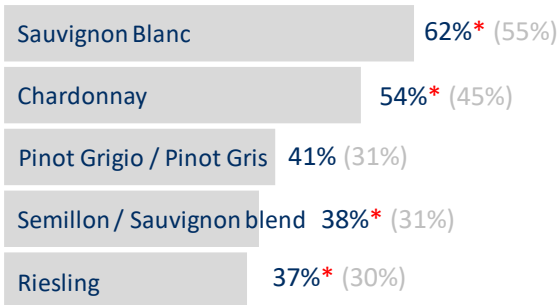
I probably drink mostly white wines with my favourite varietal being Rieslings, Pinot Gris / Pinot Grigio and Gewürztraminer  
*Female, 25-29*

The age of the wine and the region are two things that I would probably look at straight away. The type of grape is also important  
*Male, 40-44*



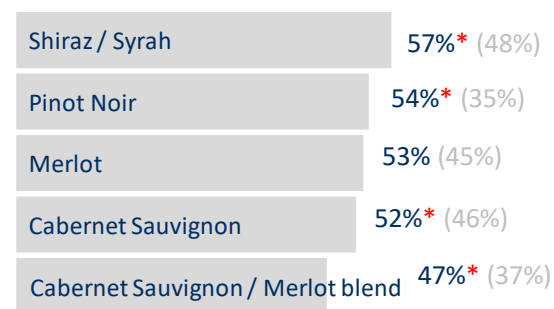
## Top 5 white varietals they consume

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



## Top 5 red varietals they consume

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



( ) All AUS regular wine drinkers

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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

Wine Intelligence consumer interview programme, see appendix

# Engaged Explorers: What they drink - brands

Engaged Explorers are more likely to be aware of a range of lesser known wine brands, indicative of their exploratory attitude to the category



## What is their attitude towards brands?

- Even though familiarity with a brand is important for consumers in this segment when they buy wine, they place more importance on varietal or region of origin
- They over-index on awareness of lesser known wine brands, but conversely, they under-index on awareness of larger mainstream brands
- They do have a selection of brands which they regularly drink, however this is often due to participation in a particular producer's wine club or during a regular visit to a winery

## Brands you might find them drinking include:



I usually don't focus so much on brands, I focus more on the regions, so there might be brands in particular regions that I might like, but I sort of vary it  
Male, 40-44

# Engaged Explorers: Wine origin

Engaged Explorers rank country and region of origin very highly when choosing wine and are willing to explore beyond the mainstream regions



## Provenance is an important part of their knowledge

- Compared to other segments, a higher proportion of consumers in this group considers country and region of origin to be important when choosing a bottle of wine, and a higher proportion drink wine from a variety of countries outside of Australia
- Wines from lesser known regions are purchased by a higher proportion of drinkers in this segment, reflecting their willingness to explore beyond the mainstream wines

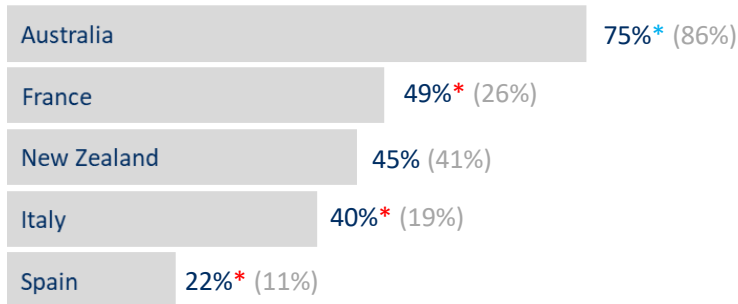
I started off on my wine journey in Australia and the Hunter Region, then the Barossa Valley and Margaret River, but over time I've decided to explore more of the European side  
*Male, 35-39*

The regions of Orange, Hunter Valley and Mornington Peninsula come to mind. At the moment I like Pinot Noir, so maybe cooler places like Mornington or Tasmania  
*Female, 25-29*



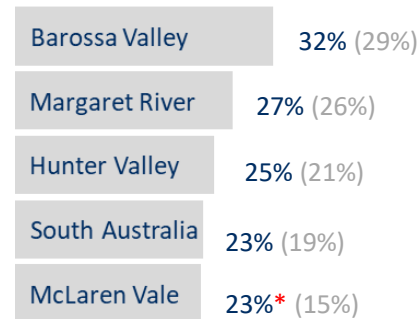
## Top 5 countries of origin consumed

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



## Top 5 regions of origin purchased

% who have bought wine from the following wine-growing regions in past 3 month



( ) All AUS regular wine drinkers

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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

Wine Intelligence consumer interview programme, see appendix



# Engaged Explorers: Off-premise behaviour

Their high level of involvement extends to the purchase process, where they are willing to invest time in selecting wine



## Exploration fuels a broad repertoire

- A higher proportion consider the purchasing decision important and are willing to spend a lot of time and effort in order to choose the right wine
- This segment enjoys asking knowledgeable shop staff for recommendations and enjoy taking this as an opportunity to learn more about wine, yet only undertake this behaviour in selected establishments in which they believe the staff will have sufficient knowledge

When we go to our local wine store, we are usually the only people there at any point in time so we really get to take our time and explore the range. I really enjoy not being rushed when I'm in the store. I prefer the independent sellers because the staff know the wine and care about what you drink and can really point you in the right direction  
*Male, 35-39*



## Wine purchased in the off-premise

- They are the highest spending consumers in the off-premise for all occasions
- This segment has the lowest proportion of consumers versus other segments who consider promotional offers important when buying wine
- Typical off-premise spend is above \$15 per bottle



## Off-premise choice cue hierarchy



# Engaged Explorers: Off-premise channels

Engaged Explorers purchase wine from a broad range of retail channels, particularly favouring specialist channels, with promotional offers less important when buying wine



## Wine channel usage in the off-premise

- Compared to other segments, Engaged Explorers purchase wine from the broadest selection of off-premise outlets, with a particular focus on outlets that offer a good range of different styles
- Engaged Explorers also have the highest proportion of consumers purchasing wine online, using the channel to help explore the category further. However, there is some reluctance to this channel within the group as many desire the instantaneous nature of traditional retail

I like buying online as it's easy. The subscription that I was getting was a mixed case so there was an element of surprise and you wouldn't really know what you were going to get until it arrived  
*Male, 25-29*

I buy a lot online. Vinomofu packets where you get the different labels and different varietals mixed in a bundle  
*Female, 25-29*

As a last resort we will go to somewhere like Dan Murphy's if we are grabbing something on the way to a friend's place or something like that. Or if we are trying to put on an event, we would go there and grab it by the bulk  
*Male, 35-39*



## Top wine buying channels

% who buy wine through the following channels



( ) All AUS regular wine drinkers

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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

Wine Intelligence consumer interview programme, see appendix

## Engaged Explorers: Cellar door

Engaged Explorers see the cellar door experience as one where they can fulfil their desire to explore the wine category and gain more knowledge direct from the source



### Exploration direct from the source

- Cellar door visits and tastings, for Engaged Explorers, satisfies both the desire to acquire new experiences in the wine category as well as continuing to build their wine knowledge. They are interested in hearing the story behind the wines and winemaking process
- If they discover a cellar door that they like they will then likely go on to join the mailing list and purchase directly from that cellar door. And they have the highest proportion of consumers, compared to other segments, that purchase direct from a cellar door via mail order
- Engaged Explorers also have the highest proportion of consumers that purchase wine while visiting a cellar door compared to the other segments

Some of the wines that I would say are my favourites I found through cellar doors, so they are kind of rare ones. My partner's family lives in Hobart so whenever we are there we go to a lot of different cellar doors, so I've found a few pretty nice ones  
*Male, 40-44*

Lakes Folly is one of the only cellar doors in the Hunter Region where every time you drive by they say they are sold out. So one time when we saw it open we went in and we tasted the wines and realised why they are always sold out  
*Male, 35-39*

If I'm at a Cellar Door I'd say I'm more likely to buy it straight off them  
*Female, 25-29*

## Engaged Explorers: On-premise behaviour

With high wine consumption frequency and spend in the on-premise, they are confident in their knowledge but also enjoy recommendations from staff to help to explore new wines



### Wine in the on-premise

- Compared to other segments, they drink wine the most frequently in the on-premise, as well as being the highest spending consumers per bottle or glass when drinking wine when out
- When looking at wine lists, they look for countries / regions and varietals that they recognise, and are keen to ask sommeliers or waiters for recommendations about food and wine pairing, using this as an opportunity to learn more about wine
- They have a preference for ordering by the bottle as they often drink wine in social settings with friends or family. The exception to this preference is when they are drinking by themselves or with a partner, where the by the glass offering allows them to explore a range of different wine styles
- Although wine is their typical preference of alcoholic beverage, Engaged Explorers are willing to switch to other alcoholic beverages, in particular at venues that might have a limited wine selection, such as at pubs where wine isn't a focus

I probably more frequently buy by the glass. This probably changes by the number of people I'm with  
*Female, 25-29*

If my husband is there, I will buy a bottle because we can usually agree on the style of wine we want  
*Female, 35-39*

The preference is definitely by bottle because at least you know it's fresh and hasn't been open for days. It also means I can try different wines that aren't on by the glass  
*Male, 35-39*

# Engaged Explorers: Claire & Matt

Claire, 32, and Matt, 29, live in Melbourne, where Claire works in corporate banking and Matt works as occupational therapist



## How does wine fit into your life?

Wine is something that we like to share together at the end of the week or even after a long day! It's what we most often drink at home, particularly when we are eating. We like trying new recipes and cuisines, and then looking for a wine that's new to us that goes well with it. We have a subscription to a wine club and will order a mystery box, which is always exciting when it arrives, and we trust that they know what they are doing and choose good wines. We do go out quite a bit – either together, to meet friends or with our 'separate' groups. There are so many great restaurants and bars in Melbourne that we often get to try new things – although, we also have our firm favourites to. Our favourite thing to do is to explore wine country – either in Victoria or beyond. We just came back from a long weekend in Tasmania – we went primarily to visit the Cellar Doors.

## How do you choose your wine?

We have a local independent wine store, so when we go there, we like to talk with the staff as they tend to have more knowledge than in the chain stores. They also do regular tastings which we try to get to. Sometimes we will look up reviews online to learn more about a particular region or style. If it's a special occasion, we might go for something a little more expensive, or for a Champagne. We have visited a few wineries overseas while on holiday, and always love the experience of expanding our knowledge.

## What wines do you enjoy drinking?

When it's a hot summer day, we really enjoy white wines. We have been trying new wines from different regions, at the moment a lot of Rieslings and Pinot Gris, even Gewürztraminer. If there's something different from Germany or France we might try that. Later in the evening, we might switch to red wine, I like a Pinot Noir and Matt particularly likes bolder Shiraz. When we started drinking more wine, we focused on Australian regions, and now we like to explore more European wines.

# Contents page



- Introduction p. 2
- How Portraits works p. 5
- Meet Australia Portraits 2019 & changes since 2016 p. 8
- Australia Portraits 2019
  - Engaged Explorers p. 25
  - Social Newbies p. 39
  - Mainstream Matures p. 51
  - Contented Treaters p. 64
  - Senior Bargain Hunters p. 74
  - Kitchen Casuals p. 81
- Methodology & Appendix p. 89



# Social Newbies: Overview

Younger wine drinkers, who are newer to and still exploring the wine category, and who are social drinkers who rely heavily on recommendations



Youngest segment with 66% aged under 35 years old

Most likely to drink wine once a week in a social setting with friends

Less experience in the wine category, they have limited knowledge of wine brands and are more likely to get recommendations from friends and family

Brands you might find them drinking include:



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



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



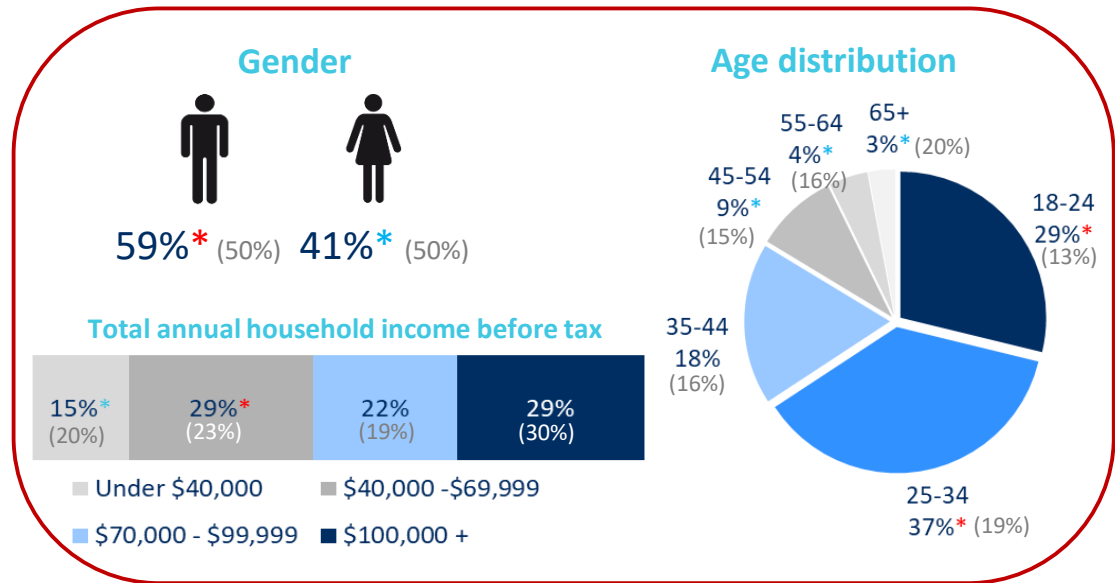
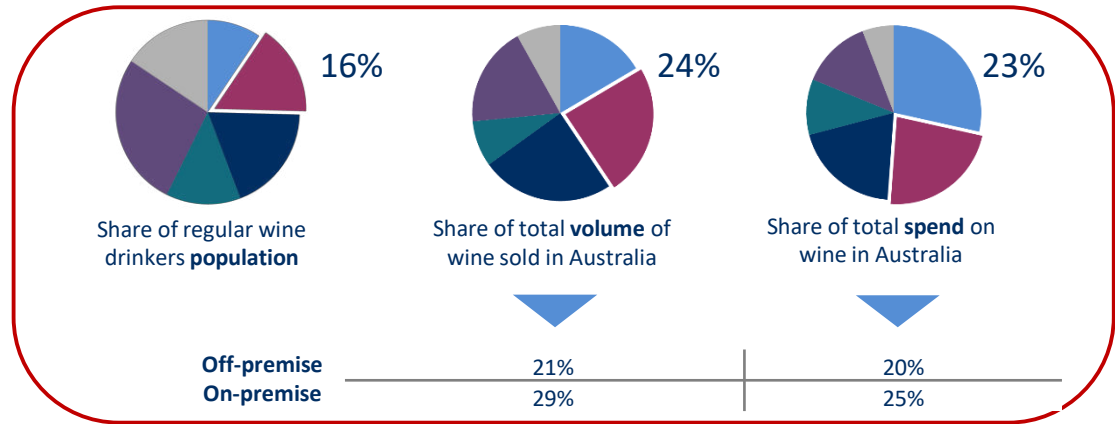
Source: Wine Intelligence, Vinitrac® Australia, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

# Social Newbies: Profile

Younger, mid- to high-income wine drinkers, with a high proportion being men, often living in urban areas, and who have mid-range per bottle spend on wine both off- and on-premise

## What you need to know

- **Male skewed:** A significantly higher proportion of men in this segment
- **Younger drinkers:** Youngest segment with majority aged under 35 years old
- **Urban professional:** Often city-based and in higher paying professional jobs
- **Third highest spending segment on wine, especially in the on-premise.** Despite being one of the smallest segments in terms of share of population, they account for 23% of the total spend on wine in the Australia and 25% of spend in the on-premise



( ) All AUS regular wine drinkers

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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers



# Social Newbies: Wine involvement

The importance of wine for Social Newbies is influenced by social settings with enjoyment, exploration and experimentation of wine most often occurring in the on-premise

## Highly involved in the wine category

- Wine is becoming a more active and important part of the social lives and experiences of Social Newbies, and they usually drink more wine in the on-premise sharing with family and friends
- Social Newbies have a broad repertoire and wine is one of many alcoholic beverages they enjoy which also includes, vodka, whisky, cocktails, RTDs and craft beer. They will likely choose to drink and explore wines when sharing with others, generally when in a restaurant
- With the low levels of experience and knowledge, most things in wine are considered 'new' to a Social Newbie. This is reflected in Social Newbies having the highest proportion of consumers who enjoy trying new and different styles of wine on a regular basis

## Top 5 alcoholic beverages: Past 12 months

% who drink the following alcoholic beverages

Red wine	79% (79%)
White wine	78% (80%)
Beer	71%* (66%)
Vodka	53%* (38%)
Whisky / Whiskey	49%* (40%)



I drink more in bars / pubs than at home. Wine isn't my first choice there. I'd say I drink wine mainly in restaurants if I'm with a friend who has a bottle

*Female, 18-24*

When I first started buying wine I didn't know what I was looking at in terms of international wines. I suppose I buy Australian as well because I have a reasonable knowledge of what I'm looking at, but if I'm in the mood I'll buy something I don't know and give it a go

*Male, 25-29*

( ) All AUS regular wine drinkers  
 \* / \* Statistically significantly higher / lower than all AUS regular wine drinkers at a 95% confidence level  
 Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers  
 Wine Intelligence consumer interview programme, see appendix

# Social Newbies: Wine knowledge

Although very involved with wine, wine knowledge levels are relatively lower, driven by their younger age and less years of experience with wine, but there is a desire to learn



## Recommendation key to building wine knowledge

- The younger age and lack of experience of Social Newbies puts them at the bottom of the scale when it comes to wine knowledge, but there is a definite desire to learn more
- Social Newbies seek information and look to more knowledgeable sources as well as peer reviews on a regular basis. They are more likely to ask questions from knowledgeable staff in stores and restaurants as well as asking family and friends for recommendations
- This segment use social media and apps more than other segments for wine information, trusting the reviews of peers and other trusted sources for recommendations



I use an app in the way that if I've found something, I will save what I like and I can find more information about that wine, that particular bottle or that one variety. I don't necessarily do it in reverse  
*Female, 25-29*

I don't mind reading different reviews to see what people have said  
*Female, 25-29*

I would search online or ask someone. I have often read about wine in catalogues and advertising, like Dan Murphy's and liquor stores and local papers  
*Female, 18-24*

I normally just look it up on my phone, read the bottles...I prefer to just take my time looking around and seeing what's available  
*Male, 18-24*

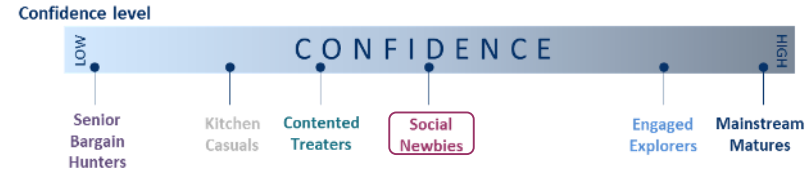
# Social Newbies: Confidence with wine

Their interest in wine fuels their confidence and they use experimentation to continue to build their knowledge and repertoire



## Confidence to keep experimenting

- Their high interest and involvement in the category and willingness to learn fuels their confidence. They are very willing to try new brands and varieties to increase their overall knowledge and repertoire
- They are typically the person in a group who steps back from making the wine choices, but will happily share a bottle with friends at a restaurant for dinner
- Individuals in this category will gravitate towards familiar regions, usually within Australia, and will choose varietals accordingly



I do like to explore. I'd say that I generally choose the more well-known areas and regions from around Australia and based off information that I've been given  
*Female, 35-39*

I would probably say that a label grabs my attention more than a brand name. I notice the label first and then go over rather than look for a specific brand and gravitate towards that  
*Female, 25-29*

I don't go into a store with a particular idea to grab a particular wine from a particular region. I will walk through, get advice from someone or something like that. I like to try new things often so I guess that also limits my abilities to remember the wines that I always like  
*Male, 25-29*

# Social Newbies: What wine do they drink?

Grape variety plays a less role important when it comes to purchasing wine, but they are open to explore varietals across a broader repertoire as they continue to discover the category

## Still experimenting with no set preferences

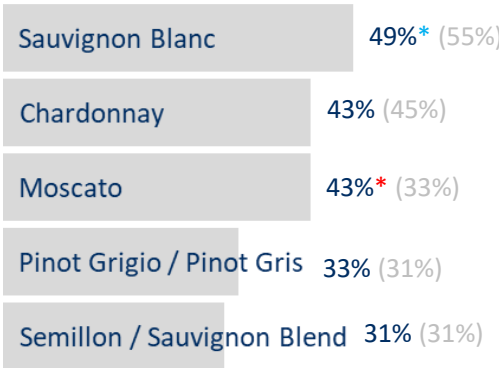
- When it comes to wine buying choice cues, they under-index with regards to grape variety as an important factor and are more likely to choose wine based on alcohol content
- However, compared to other segments, they are more likely to drink a wider array of varietals which is closely related to their openness to explore new varietals
- This segment also has the highest proportion of Moscato drinkers versus any other segment as well as the second highest proportion of rosé drinkers

I'm a big fan of reds but I'm starting to drink more whites as well. Style-wise, I'm mainstream really with that I like but I'm more of a red drinker  
*Male, 25-29*

I guess I would just be inclined to try it if someone told me it was sweet. That's really what would appeal to me. Not so much the region or anything.  
*Female, 18-24*

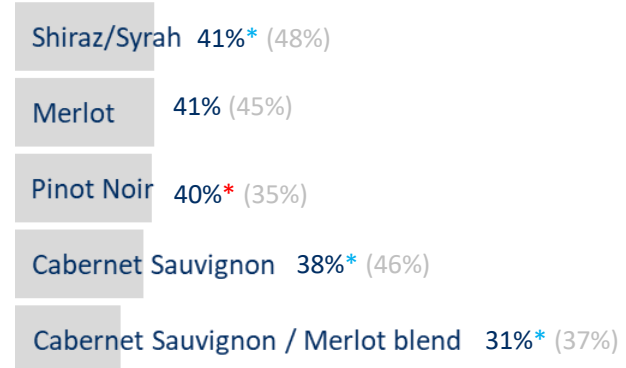
## Top 5 white varietals they consume

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



## Top 5 red varietals they consume

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



( ) All AUS regular wine drinkers

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Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

Wine Intelligence consumer interview programme, see appendix

# Social Newbies: What they drink - brands

Social Newbies are less aware of wine brands than other drinkers, mainly do to their shorter experience within the category, and have yet to build knowledge and memory of wine brands



## What is their attitude towards brands?

- Social Newbies do not consider brand an important factor when choosing wine. Their overall levels of brand awareness are much lower when compared to other regular wine drinkers, but they do have the highest levels of conversion from brand awareness to purchase, which indicates their willingness to trial new wines when they do become aware of them
- As they still lack some confidence in the category, they are more likely to spend more on a brand they have heard of, when trying to impress other people
- Typical off-premise spend is around \$10 to \$20 per bottle

If it was a bigger occasion, I go for a bigger name brand or a more prestigious winery  
*Male, 25-29*

I'm not really too sure on the brand names or the wine labels I've had in the past  
*Female, 25-29*

## Brands you might find them drinking include:



# Social Newbies: Wine origin

With lower overall knowledge and experience of wine, Social Newbies are less concerned with country and region of origin when choosing wine and are willing to experiment when given the opportunity

## What is their attitude towards countries and regions of origin?

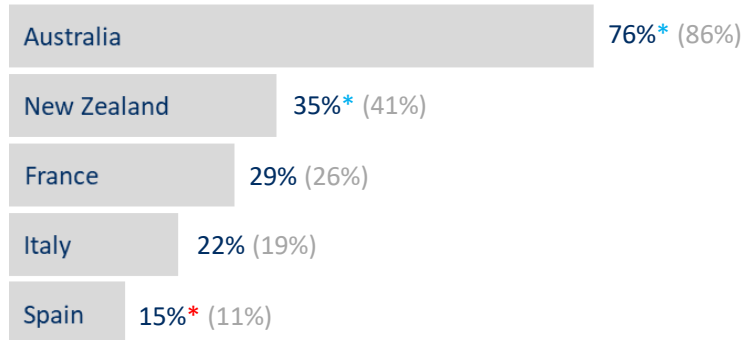
- Due to their lack of experience in the category, their awareness of wine regions and countries of origin is low compared to the regular Australian wine drinker
- While wine origin is not an influencing factor when it comes to wine-buying, their appetite for experimentation in wine shines through, with Social Newbies having some of the highest levels of conversion from awareness to purchase across all countries and regions of origin compared to other other wine drinkers

From my small knowledge of wine, I know a few good regions or which wines often win awards and things like that  
*Male, 25-29*

If it's a region that I recognise, I'm probably more inclined to pick that one over a region that I don't recognise  
*Female, 25-29*

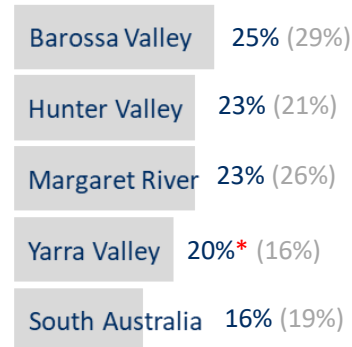
## Top 5 countries of origin consumed

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



## Top 5 regions of origin purchased

% who have bought wine from the following wine-growing regions in past 3 month



( ) All AUS regular wine drinkers

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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

Wine Intelligence consumer interview programme, see appendix

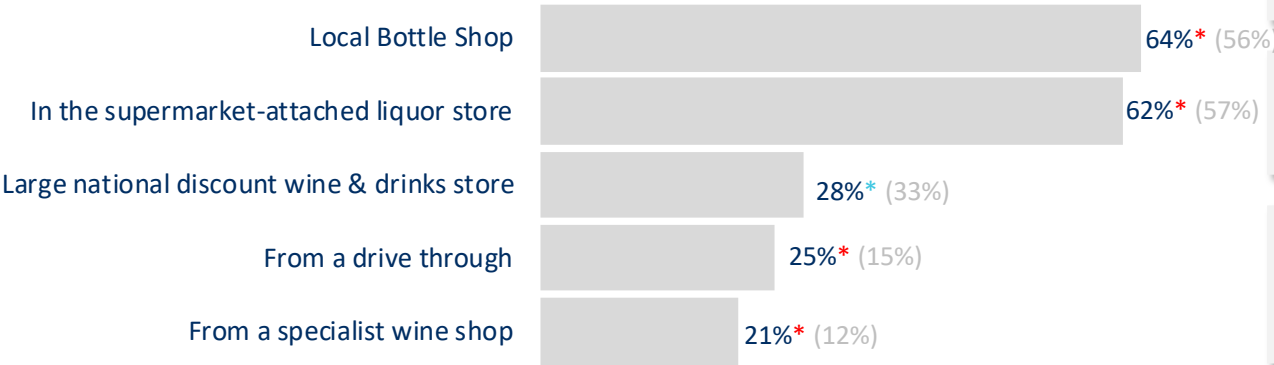
# Social Newbies: Off-premise channels + behaviour

Social Newbies typically consume wine in more social settings and rely heavily on recommendation when making their purchases



## Top wine buying channels

% who buy wine through the following channels



When it comes to price, I'm not overly educated about wine and I'm not sure of the value of some of the wines out there  
*Female, 25-29*

I'm going to buy a larger amount of wines, I'll either buy it online or I will go to Dan Murphy's  
*Male, 25-29*

I don't really go out of my way to any liquor stores, just whatever is in my local shopping centre or wherever I am, that's where I'll go  
*Female, 25-29*



## Wine channel usage in the off-premise

- Due to their lower knowledge and experience, and distinction from other segments, Social Newbies rely heavily on recommendation and wine descriptions when choosing what wines to buy and they also struggle to judge what is considered good value for money
- Social Newbies have the highest proportion of consumers purchasing from local bottle shops and supermarket attached liquor stores and rank highly for online purchases. When choosing a store, their focus is on convenience
- Social Newbies are more likely to consume wine at social events such as parties / celebrations and at BYO venues than other segments



## Off-premise choice cue hierarchy



( ) All AUS regular wine drinkers  
 \* / \* Statistically significantly higher / lower than all AUS regular wine drinkers at a 95% confidence level  
 Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers  
 Wine Intelligence consumer interview programme, see appendix

# Social Newbies: On-premise behaviour

On-premise occasions are important for Social Newbies, an opportunity to share time with family and friends while also enjoying wine



## Wine in the on-premise

- The social atmosphere and the experience of an on-premise occasion and sharing time with family and friends is important to Social Newbies, and is a key wine consumption occasion for them
- They have the second highest rates of on-premise consumption compared to other segments drinking wine at both casual and formal on-premise occasions, but their typical on-premise spend is lower
- They are more likely to drink wine at a restaurant than a bar or a pub, especially if it is an opportunity to share a bottle with others. Bottle choice is generally based on the atmosphere and the cuisine choice

My favourite time to have a wine would be a Friday night out socially with friends  
*Female, 25-29*

Definitely in restaurants, when I'm out with my family, we will have at least one bottle of wine  
*Male, 18-25*

If I'm in a pub or a bar, I'm more likely to have a beer. If I was sitting down in a restaurant then I'll be more inclined to drink wine. Socially as well, if more people are into wine, we will buy a bottle and drink together  
*Male, 25-29*

My favourite time to drink wine would be on the weekends, having dinner out with friends  
*Female, 18-24*



# Social Newbies: Nick

Nick, 27, lives in an inner city suburb of Sydney, where he works for an IT business



## How does wine fit into your life?

If I'm going out to a pub or a restaurant with friends, that's when I'm more likely to drink wine. Often there is a lot to choose from, so I will get advice from the waiter or leave the decision up to my girlfriend or friends if I can! It's rare for me to drink wine alone, so the social aspect of sharing a bottle of wine is really what I like. Going out with friends definitely lets me experiment with different wines and try out what they are drinking too.

## How do you choose your wine?

I don't really go out of my way to shop for wine. If I'm at the store and I know I'm going to a barbeque on the weekend or something, I will grab a bottle, based mostly on what I will be eating or who I'm sharing it with. Aldi does some good deals and I've always been pleasantly surprised when I've tried something new from them. I know some of their wines have won awards too. If I'm out with other people, I don't really like to choose the wine, but I might go with a brand I recognise.

## What wines do you enjoy drinking?

There are some brands that I recognise straight away from the bottles, but I often struggle to remember the names. I do like red wine more, and I really enjoy a Shiraz or a Cab Sauv. My preferences have definitely changed the more I drink, and I like to try new things when people recommend them to me, or we share a bottle out somewhere. Now that I enjoy wine more, I'm even more open to experimenting

# Contents page

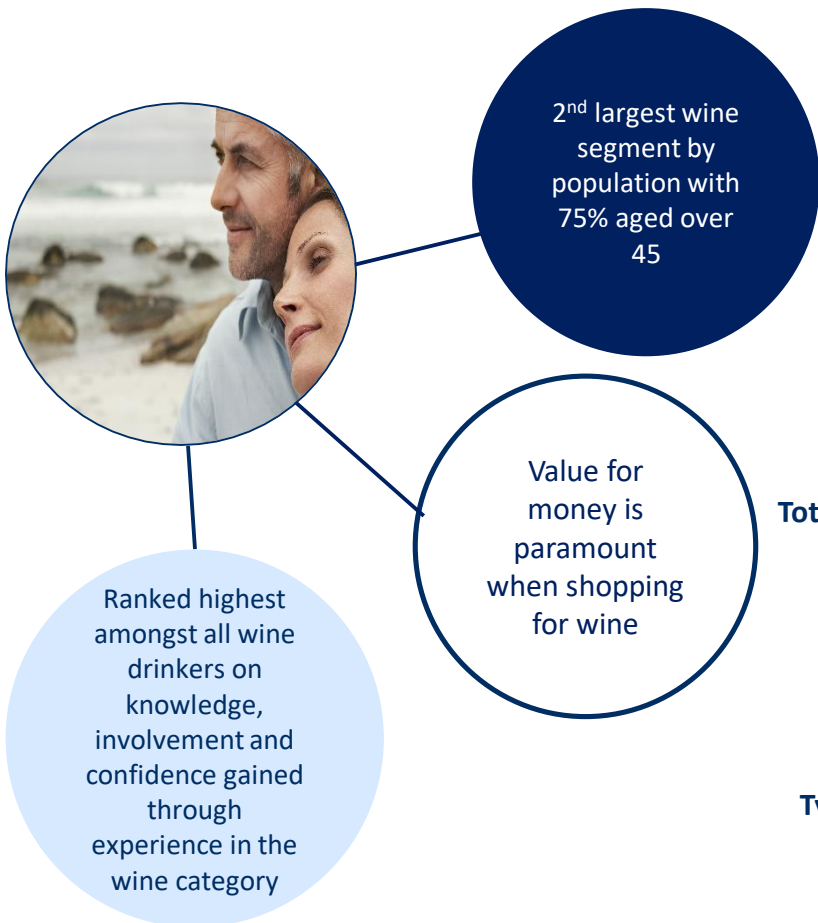


- Introduction p. 2
- How Portraits works p. 5
- Meet Australia Portraits 2019 & changes since 2016 p. 8
- Australia Portraits 2019
  - Engaged Explorers p. 25
  - Social Newbies p. 39
  - **Mainstream Matures** p. 51
  - Contented Treaters p. 64
  - Senior Bargain Hunters p. 74
  - Kitchen Casuals p. 81
- Methodology & Appendix p. 89



# Mainstream Matures: Overview

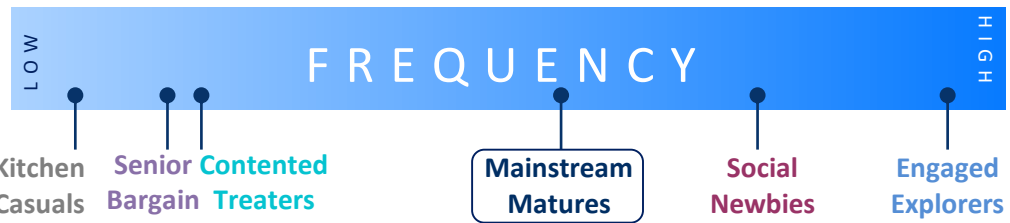
Second largest segment by population, with a majority aged over 45, they have the highest levels of knowledge, involvement and confidence in the wine category, but remain value driven wine consumers



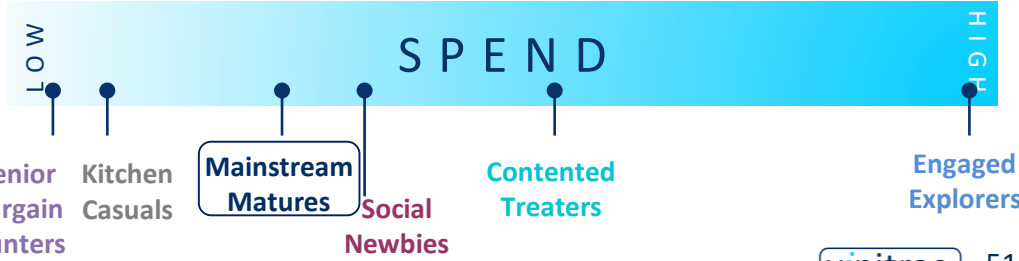
Brands you might find them drinking include:



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



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



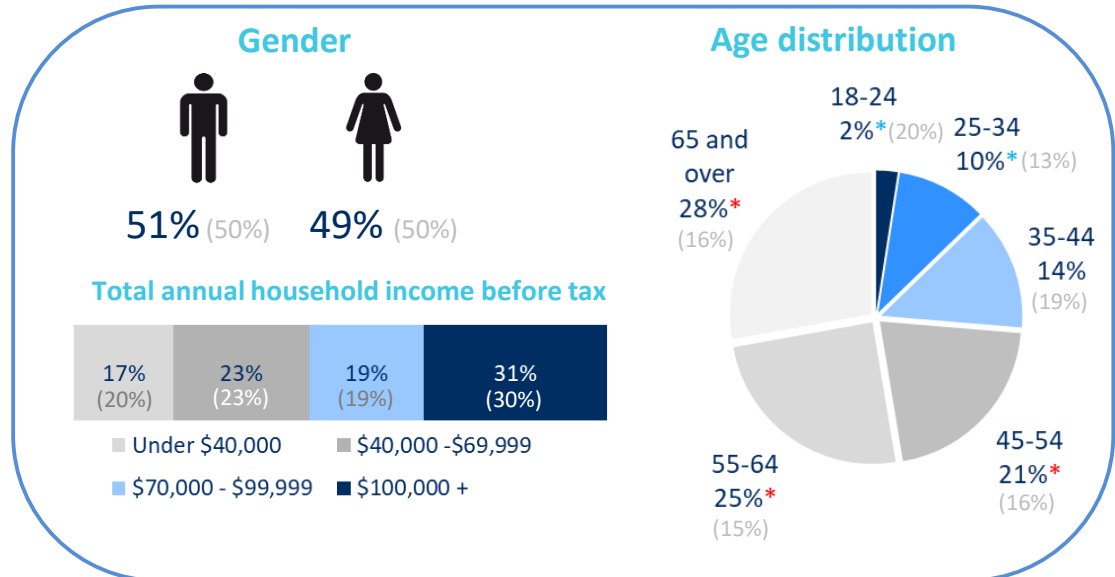
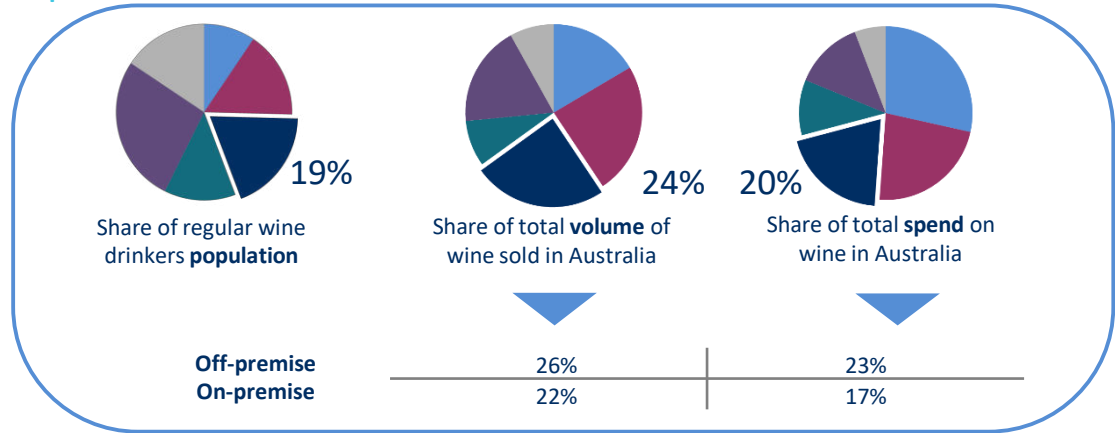
Source: Wine Intelligence, Vinitrac® Australia, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

# Mainstream Matures: Profile

Mid-age to older drinkers, equal number of men and women and they rank equal first in consumption by volume, but third in total spend

## What you need to know

- **Equal women and men:** Mirroring the wine drinking population in both gender and income
- **Mid-age to older drinkers:** Significantly higher proportion aged over 45
- **Suburban-based:** More likely to live in the suburbs of a city and less likely city-based
- **Equal highest share of volume:** They represent a 24% share of total wine volume consumption equal with the Social Newbies segment



( ) All AUS regular wine drinkers

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

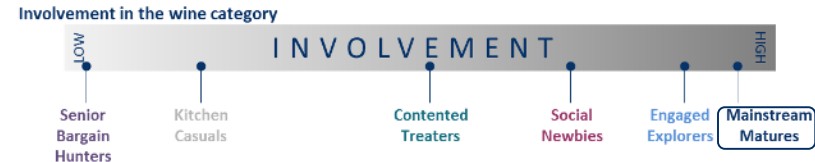
Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

# Mainstream Matures : Wine involvement

Wine is their alcoholic beverage of choice enjoyed most days as a relaxing drink at the end of the day or with a meal

## Love their wine

- Mainstream Matures have the highest level of wine involvement versus other segments. Wine is their alcoholic beverage of choice for most occasions both in the off- and on-premise and they virtually all agree (98%) that they derive pleasure from drinking wine
- Drinking wine is part of their daily routine, and they enjoy wine at home on a very regular basis either to relax at the end of the day or with a meal
- The majority do enjoy trying new and different styles of wine and will explore within varietals they are familiar with or may be tempted to trial something new with the right promotional offer



I do like a win and I don't need an occasion  
*Female, 55-59*

We would often have a glass of red once the kids are in bed just while watching a movie or something  
*Female, 35-39*

I go and have a look at the specials, see what's on sale and if I like the blend then I will try new ones if they are on sale and they look good  
*Female, 55-59*

## Top 5 alcoholic beverages: Past 12 months

% who drink the following alcoholic beverages

Red wine	86%* (79%)
White wine	86%* (80%)
Beer	72%* (66%)
Sparkling wine from Australia	53%* (40%)
Whisky / Whiskey	44%* (40%)

( ) All AUS regular wine drinkers

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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

Wine Intelligence consumer interview programme, see appendix

# Mainstream Matures: Wine knowledge

Highest levels of knowledge versus all other segments gained through experience over the years with wine and active learning

## Actively seek out wine knowledge

- Mainstream matures have by far the highest levels of overall knowledge amongst all regular wine drinkers. This is gained through years of experience and active learning within the wine category
- They over-index on awareness for every country and region of origin tested versus all other consumer segments
- They will read wine-related publications and articles in offline and online formats, and will engage with information that is shared or sent to them
- Wine is a topic of conversation amongst friends and family and Mainstream Matures will likely be both a source of knowledge and recommendation as well as willing and open to receive knowledge and recommendations from peers



If it's wine information in a supplement from the paper or something like that I will read it, and with my husband and daughter we will talk about wine  
*Female, 55-59*

I find wine information mostly through friends and word of mouth...sometimes magazines, but most of the time online. I Google wines and read about them often  
*Male, 60-64*

# Mainstream Matures: Confidence with wine

Rated the highest in confidence amongst all wine drinkers, Mainstream Matures constantly draw on their experience and knowledge when choosing their wine

## High Knowledge + High Involvement = High Confidence

- The high levels of involvement and knowledge in wine for Mainstream Matures translates into equally high levels of confidence and is rated highest with Mainstream Matures
- They like to make a considered choice and will take the time to browse and explore wine stores, engaging with the back label if they are presented with something new or unfamiliar
- When choosing wine in the on-premise, they feel confident enough to choose their own wine, relying mostly on varietal in helping to make their decision. They will engage staff if they wish to specifically match a wine to the food they are eating
- Varietal and region are of very high importance to this group but brand familiarity helps aids their decision making process



If we are out for a nicer dinner and there is a huge wine list we ask if there's something in particular that goes really well with the food that we have ordered  
*Female, 30-34*

I will sometimes ask the shop staff and I find them quite good...but usually no, I just have a look for myself and read the label  
*Female, 55-59*

I always try to read what they say about the wine, and that's always a pretty good guide sometimes of what you're getting  
*Male, 60-64*

# Mainstream Matures: What wine do they drink?

Mainstream Matures have a narrower varietal repertoire when compared to other highly involved segments and experiment within the mainstream varietals they enjoy

## Broad knowledge but targeted repertoire

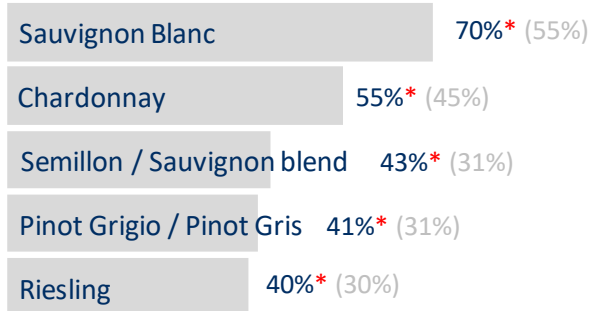
- Whilst their awareness and knowledge of varietal and regionality is extensive, the Mainstream Mature wine consumer tends to have a narrower drinking repertoire only over-indexing on a handful of key varietals across red and white wine. This is in contrast to other highly involved segments such as Engaged Explorers and Social Newbies where varietal purchasing is across a much broader set
- This narrower repertoire reflects the Mainstream Mature’s approach and experience in the category. They are confident and comfortable with the styles of wine they enjoy and limit their experimentation to within this narrower set
- This segment has the highest proportion of Prosecco and Australian sparkling wine drinkers versus any other segments, but they still restrict sparkling wine to more special and celebratory occasions

I do have my favourites with my Cab Sav...like Taylors, Tempus Two and Pepperjack, but I’m always open-minded to try something different if it’s a Cabernet blend  
*Male, 60-64*

I prefer French, so that's Champagne, but if I have a Champagne it's usually for a special occasion  
*Female, 55-59*

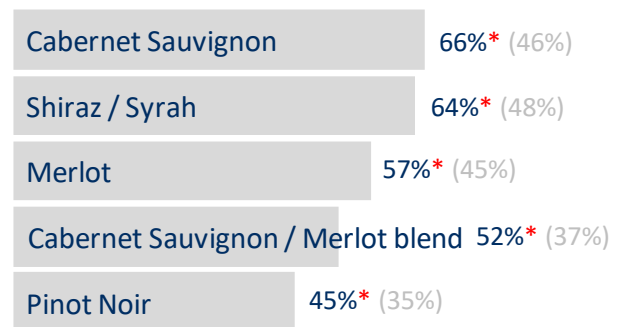
## Top 5 white varietals they consume

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



## Top 5 red varietals they consume

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



( ) All AUS regular wine drinkers

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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

Wine Intelligence consumer interview programme, see appendix



# Mainstream Matures: What they drink - brands

For this lower spending segment, brand and brand experience is used as a handy short-cut to trust and quality, especially when assessing value for money and getting a good deal



## What is their attitude towards brands?

- Brands play the role they are intended to do for Mainstream Matures, as a handy shortcut to trust and indicate quality. Mainstream Matures have trialled many brands over the years and can rely on that brand experience to help in their wine purchase decision
- As a price conscious segment, brand becomes especially relevant for Mainstream Matures when it comes assessing value for money and navigating the category by price point, allowing them to spot a perceived 'better deal'
- They over-index in awareness and purchase of all brands compared to other wine consumers including retailer-only brands

I probably favour Taylors and Grant Burge. They have the Chardonnay that I like and it's a comfort for me  
*Female, 55-59*

I find Penfolds quite elegant and a little bit old fashioned. I think it makes me more reassured that the quality is better  
*Female, 55-59*

## Brands you might find them drinking include:



# Mainstream Matures: Wine origin

While wine origin is an important factor in the decision making process for Mainstream Matures, there is a favouritism to local Australian and New Zealand wines

## Provenance an important part of their knowledge

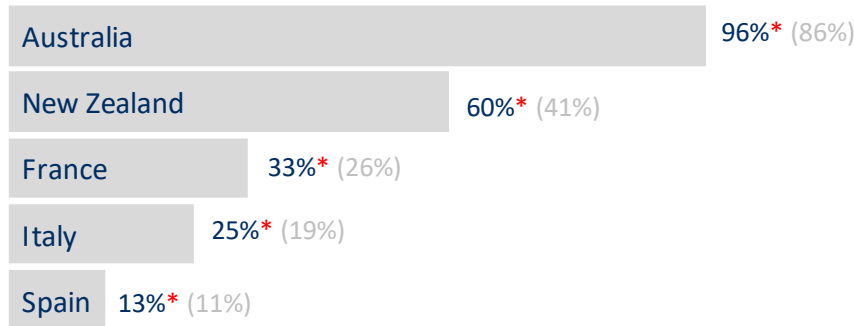
- Like their varietal knowledge, Mainstream Matures over-index on awareness of a broad range of countries and regions of origin
- When it comes to purchasing, there is a favouritism for Australian and New Zealand wines, with Mainstream Matures having the highest proportion of drinkers who purchase wines from these countries of origin compared to all other segments
- There is a preference to buying local if they can, as there is a trust in the quality of Australian wine as well as a willingness to support local production

I usually go for the Australian wines, but now and then I might try something different  
*Male, 60-64*

I don't drink a huge amount of imported wine though I do tend more towards French if I'm drinking Rosé or a Pinot Gris. But typically I try to buy Australian wine if I can, I like to support the Australian wine growers.  
*Female, 25-29*

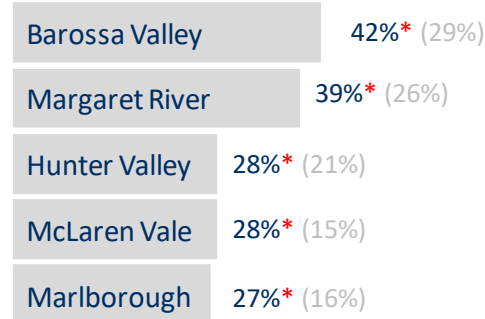
## Top 5 countries of origin consumed

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



## Top 5 regions of origin purchased

% who have bought wine from the following wine-growing regions in past 3 month



( ) All AUS regular wine drinkers

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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

Wine Intelligence consumer interview programme, see appendix

# Mainstream Matures: Off-premise behaviour

Value driven shopping behaviour - always look for the best quality wine at the right price



## Value for money is key

- The price vs quality trade-off is a major factor when choosing where to shop and what wines to buy. Compared to any other segment, Mainstream Matures have the the highest proportion of buyers always looking for the best quality wine they can get for their budget
- Most Mainstream Matures (89%) consider wine in general to be reasonably priced. This is rated highest when compared with drinkers from other segments and do not consider wine to be an expensive drink
- Mainstream Matures will typically spend up to \$15 per bottle in off-premise channels and this results in a lower overall spend in the wine category when compared to other high involvement wine drinkers
- Their experience with varietals and brands allow them to readily spot a good deal and they will seize the opportunity when it arises to purchase in bulk to have wine on hand for their regular consumption. They will also use promotional offers as a way of trying something new

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



I go and have a look at the wine specials, see what's on sale and if I like the blend, then I will try new ones  
*Female, 55-59*

Sometimes I might just buy one wine, and if the special is there I will take advantage of that, especially if I know it's a wine that I like  
*Male, 60-64*

I will have a look at a few Chardonnays and if there's one that I know and it's on special, I will buy it  
*Female, 55-59*



## Off-premise choice cue hierarchy



# Mainstream Matures: Off-premise channels

Mainstream Matures choose stores to purchase wine that offer a familiar range as well as promotional offers



## Convenient and familiar

- Along with price, convenience plays a role in selection of where to purchase wine. Familiarity with the store, range and promotional offers help make the shopping experience an easier one
- Mainstream Matures have the highest proportion of wine drinkers that purchase from large national discount stores compared to other segments including both 1<sup>st</sup> Choice and Dan Murphy's. Mainstream Matures also have the highest proportion of wine drinkers that purchase from BWS and Liquorland compared to any other segment
- For online purchasing, their preference is to use an online retailer rather than from a winery website or cellar door club

With shops, I usually go where I know what sort of wines they have. Where I live there is a local drive through which, often, they have specials on wine. They have a decent selection of Australian wines  
*Male, 60-64*

We are very lucky to have a Dan Murphy's down the road. That would be our main one and then if I've got something spur of the moment and I'm doing grocery shopping I just use whatever is attached to the supermarket  
*Female, 30-34*

If I go to the local bottle shop, it's just the pub one, and I pretty much know what I'm going to buy when I go to the store  
*Female, 55-59*



## Top wine buying channels

% who buy wine through the following channels



( ) All AUS regular wine drinkers

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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

Wine Intelligence consumer interview programme, see appendix

## Mainstream Matures: On-premise behaviour

While the majority of Mainstream Matures enjoy wine in the on-premise, their spend is amongst the lowest of all segments



### Enjoy wine at the right price

- While there is a high proportion of Mainstream Matures that enjoy wine in the on-premise including restaurants, bars and pubs, their level of spend is amongst the lowest of all wine drinkers when compared to other segments
- They will opt for a bottle when they are drinking wine with others, but they will usually always have at least one glass if they choose to drink alcohol. They navigate a wine list primarily by varietals they are familiar with, and price then has a major influence on their final choice
- They will seek recommendations from staff if they believe the staff to be knowledgeable and when they wish for help to match wines with particular foods

Wine would be my first choice of beverage. I usually look at the wine list and see what they've got and if I know of a couple I will go from there, otherwise I will ask them  
*Female, 55-59*

If the restaurant is extravagant in the way they price their wine then I will have a sparkling water first and have a wine later...but it all depends on the price  
*Female, 35-39*

I wouldn't ask the waiter because generally they don't know the answer  
*Female, 55-59*

# Mainstream Matures: Robert and Lisa

Robert, 60 and Lisa, 58 live in the outer suburbs of Melbourne, where Robert works for the local Government and Lisa is a teacher. They have two children who are 23 and 20, who still live at home



## How does wine fit into your life?

We really enjoy having a glass of wine or two at the end of the day, but we love it even more when it's the end of the week and we can share a bottle of wine with a nice meal. We always take wine with us when we go to social events like barbeques and will usually order a bottle when we go out for dinner. We don't go out to restaurants that often as we like cooking and entertaining at home, but we are more likely to go where we know we will find a wine we like for a reasonable price, where we can sit down and really enjoy it. Now that the kids are older, we've started to enjoy wine with them when we get to have a meal together. They both really like sparkling wine, so we find we are drinking more of that now than we used to.

## How do you choose your wine?

We usually go to our local bottle shop. They have regular deals and good prices. We can always find the brands we know easily and like, and sometimes they have tastings so we can try something new at a good price. If we are buying for an event or we want to have more bottles to keep, we will go to Dan Murphy's and walk around or ask the shop staff. If we have been recommended a wine from a friend, we will usually find it there.

## What wines do you enjoy drinking?

When it comes to regions, we tend to stick to Australian wines. We like the idea of supporting local industry and some of our favourite brands are from Australia. Brands such as Taylors and Wolf Blass are some of our favourites as they're reasonably priced and their reliability is reassuring for us. We also like Sauvignon Blanc from New Zealand and when we have reds, we are more likely to try different blends and we will sometimes try different international wines.

# Contents page



- Introduction p. 2
- How Portraits works p. 5
- Meet Australia Portraits 2019 & changes since 2016 p. 8
- Australia Portraits 2019
  - Engaged Explorers p. 25
  - Social Newbies p. 39
  - Mainstream Matures p. 51
  - Contented Treaters p. 64
  - Senior Bargain Hunters p. 74
  - Kitchen Casuals p. 81
- Methodology & Appendix p. 89

# Contented Treaters: Overview

Less frequent drinkers, with a high spend per bottle and a reasonable knowledge of wine



Skewed female and typically aged between 24 to 44

Higher typical spend per bottle of wine, however lower consumption frequency

Reasonable levels of involvement and knowledge but their lower frequency of consumption leads to a low level of confidence in wine

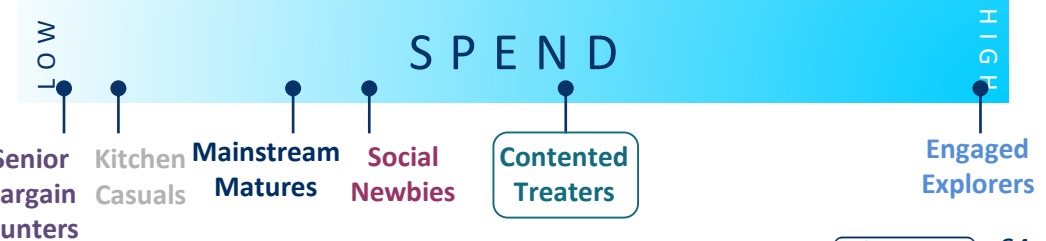
Brands you might find them drinking include:



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



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



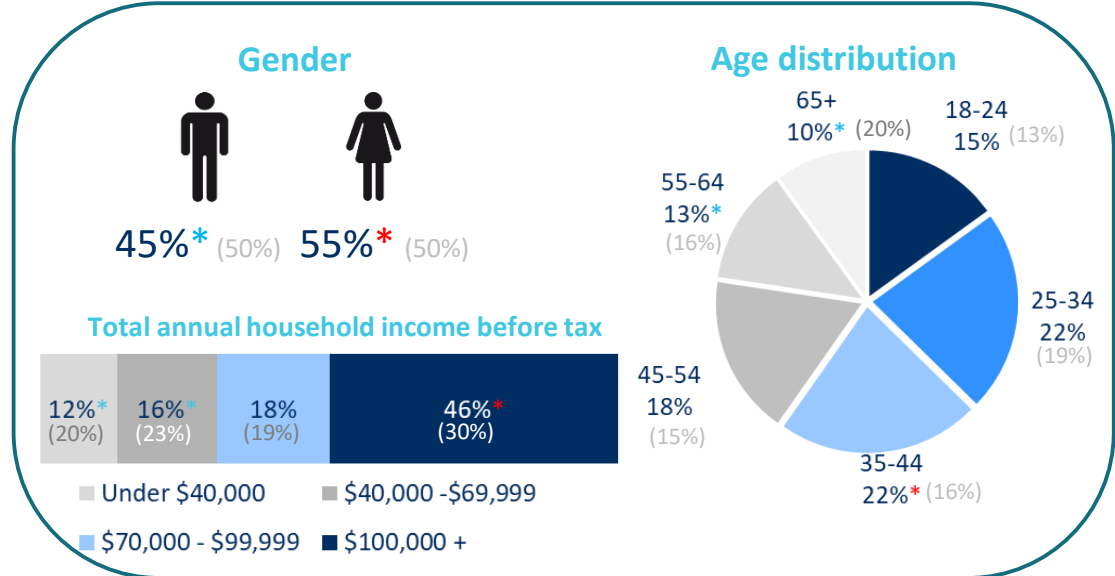
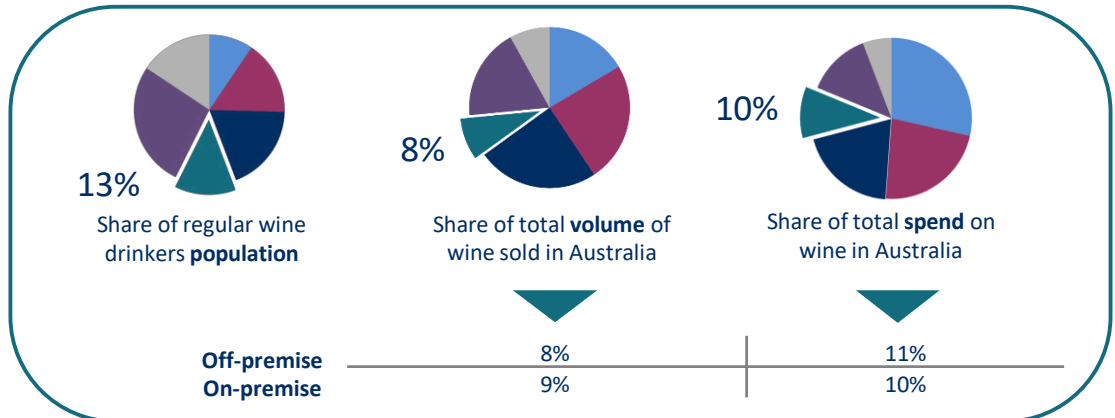


# Contented Treaters: Profile

Higher income wine drinkers that typically live in the city, drinking wine less frequently but spending more per bottle

## What you need to know

- **Female skewed:** A significantly higher proportion of women in this segment
- **Middle-aged drinkers:** A majority aged between 25 to 54, but drawn from across the age ranges
- **City living:** Often city or surrounding suburbs living with higher paying jobs
- **High spend per bottle:** Typically spend more per bottle of wine but their infrequent consumption means proportion of \$ spent on wine is second lowest amongst all regular wine drinker



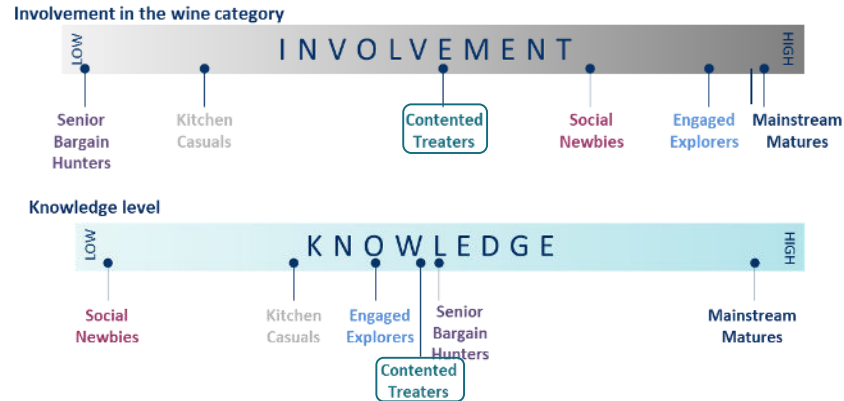
( ) All AUS regular wine drinkers  
 \* / \* Statistically significantly higher / lower than all AUS regular wine drinkers at a 95% confidence level  
 Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

# Contented Treaters: Wine involvement + wine knowledge

Contented Treaters enjoy wine, but it is not a primary part of their lifestyle. They have a reasonable knowledge of the category but will seek advice when needed

## Less frequent yet content

- Less frequent drinkers of wine purchased in both off- and on-premise, therefore mostly drinking wine in social situations with friends or family
- As wine is typically a less frequent choice, despite very much enjoying wine, it is not necessarily something they consider to be a primary part of their lifestyle
- They know the wines they enjoy and are fairly open to trying new types of wine



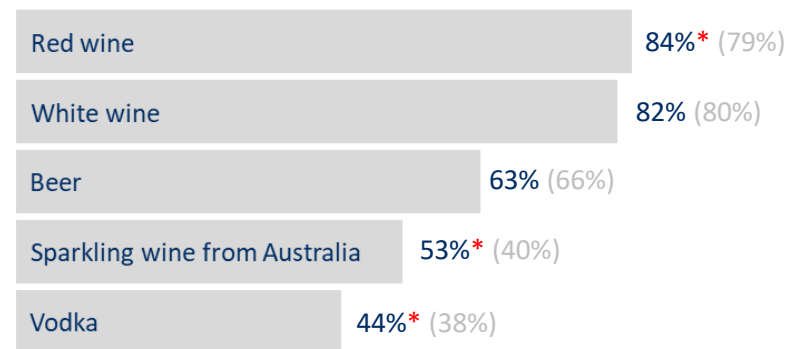
## Seek knowledge through recommendations

- Due to their mid to older age and the fact that they have been drinking wine for a number of years, they have a reasonable knowledge of the wine category and they tend to stick to wine and styles that they like
- Contented Treaters will seek out advice from staff, family and friends both in off- and on-premise occasions

My go to in a pub is probably beer, pretty basic. If I don't drink beer it will be a mixed spirit like a Bourbon or Whiskey, and that's probably my second choice  
*Male, 25-29*

## Top 5 alcoholic beverages: Past 12 months

% who drink the following alcoholic beverages



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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers  
 Wine Intelligence consumer interview programme, see appendix

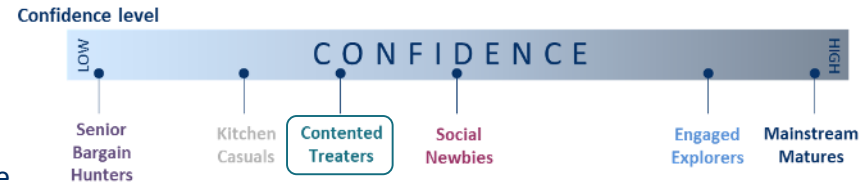
# Contented Treaters: Wine confidence

Contented Treaters can be concerned about choosing an unacceptable wine for social situations, and if they cannot defer choice to someone more knowledgeable, they will typically spend more in hope of better quality



## Want reassurance of their wine choices

- Contented Treaters have reasonable levels of involvement and knowledge with wine but their lower frequency of consumption leads to a lower level of confidence in wine
- Contented Treaters are concerned about choosing something deemed unacceptable or unsuited to the occasion and are more likely to spend more to avoid embarrassment
- While they are open to trying new things, they will divert to what they know if there is limited information from which to make a choice
- Reviews, awards and other third party endorsements help give them confidence in their wine choice
- They are likely to defer to more knowledgeable friends and family when choosing wine in a social situation



When I choose wine normally it is through friend's recommendation or the price  
*Female, 25-29*

Usually I defer the choice to someone else in the restaurant  
*Male, 45-49*

Awards or critics scores do have a certain influence as it gives authority to a wine  
*Male, 25-29*

# Contented Treaters: What wine do they drink?

Grape varietal is used to judge style and flavour, and is a key factor for Contented Treaters when choosing wine

## Right varietal for the occasion

- The mid-range knowledge of Contented Treaters gives them the ability and confidence to recognise styles and flavours via grape variety and this is a key factor for them when choosing wines, especially finding the right wine to pair with foods
- This segment has one of the highest proportions of Australian sparkling wine and rosé drinkers, as well as a high proportion drinking Champagne and Prosecco. However, sparkling wines in general are reserved for special occasions
- Brand plays a secondary role to their overall choice with low overall levels of awareness and purchase

Just saying crisp white is not enough information for me. I do like to know what the grape is  
*Female, 50-54*

I try to match it to what we are eating. If it's an Asian dish it's probably something white and if you're at an Italian restaurant it's probably red, very broadly speaking  
*Male, 45-49*

## Top 5 white varietals they consume

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

Sauvignon Blanc	60%* (55%)
Chardonnay	49% (45%)
Pinot Grigio / Pinot Gris	38%* (31%)
Moscato	37% (33%)
Semillon / Sauvignon blend	34% (31%)

## Top 5 red varietals they consume

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

Shiraz / Syrah	55%* (48%)
Cabernet Sauvignon	51%* (46%)
Merlot	49% (45%)
Pinot Noir	45%* (35%)
Cabernet Sauvignon / Merlot blend	38% (37%)

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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers  
Wine Intelligence consumer interview programme, see appendix

# Contented Treaters: Brand and wine origin

While Contented Treaters have a reasonable knowledge of brand and wine origin, these both play a lesser role when it comes to choosing wine

## Brand and wine origin of less importance

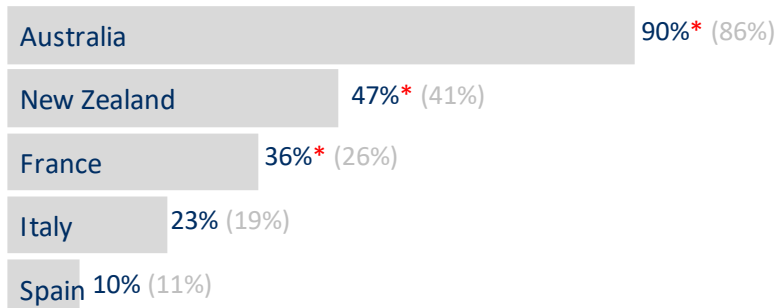
- When it comes to choosing wine, Contented Treaters rank wine region and brand after grape variety, food matching and recommendation
- They have a reasonable awareness of brands, wine countries and regions, but this does not translate to purchase with Contented Treaters sticking to a narrower repertoire

## Brands you might find them drinking include:



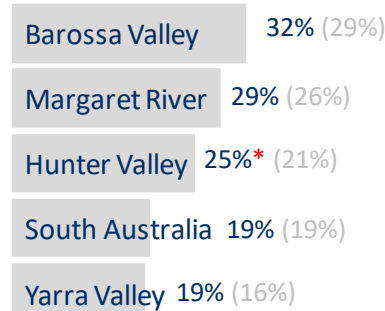
## Top 5 countries of origin consumed

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



## Top 5 regions of origin purchased

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



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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers  
Wine Intelligence consumer interview programme, see appendix

# Contented Treaters: Off-premise behaviour

Total spend by Contented Treaters is lower due to lower frequency of consumption, but they have a high average spend per bottle, with price often used as a proxy to judge quality



## Top wine buying channels

% who buy wine through the following channels



I'll go to the bottle shop with a specific set number of bottles for whatever occasion, but as I go into the store, because of the way it's set out, I do wander around the sections for each varietal. I might end up picking up an extra bottle or two if they look interesting  
*Male 45-49*

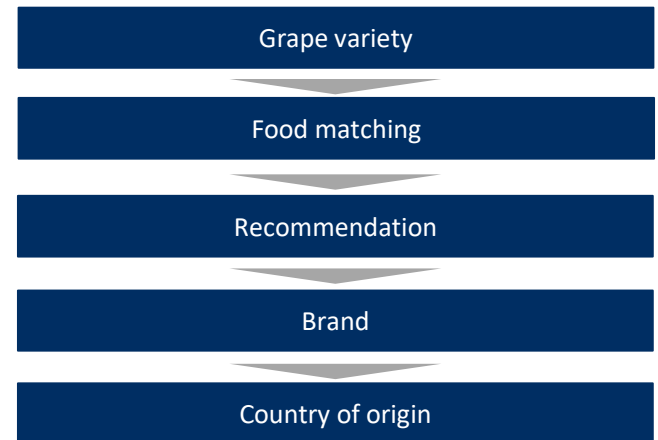


## Price an important indicator of quality

- While their overall spend on wine is relatively small, driven by their less frequent wine consumption, Contented Treaters are ranked second in terms of their average spend per bottle. Price plays an important role in their wine choice as it helps a Contented Treater judge quality
- The low frequency of purchase for Contented Treaters means that they have the lowest proportion of consumers versus other segments who consider promotional offers important when buying wine
- Compared to other segments, they are most likely to buy wine in a local bottle shop and least likely to purchase wine online



## Off-premise choice cue hierarchy



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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers  
 Wine Intelligence consumer interview programme, see appendix

## Contented Treaters: On-premise behaviour

Infrequent on-premise wine drinkers, but have a higher average spend per bottle. They are more than happy to pass responsibility of wine choice onto someone else with more knowledge



### Choosing the right wine is important

- Like their off-premise spend, Contented Treaters are ranked 2<sup>nd</sup> lowest in total on-premise spend due to their infrequent purchases, but again ranked second highest in terms of spend per bottle
- Price again becomes a proxy for quality with a Contented Treater, who opts for a slightly more expensive option to give them more confidence that they are purchasing a better quality product and to avoid potential embarrassment in a social environment
- Wine choice in the on-premise is primarily driven by food choice, selecting by the varietal and its suitability with the meal. If they are in doubt about what is the right wine to choose, they will ask staff for assistance
- If there is someone with more knowledge about wine at the table, the Contented Treater is happy to defer responsibility of choice to this person

If I'm in a restaurant, I will most likely drink wine.  
Half the time I would give the wine list to my girlfriend to choose, and then she will suggest a few that she likes the look of and I will pick from those. Either that, or I will decide what I want to eat and then think about what might go well with it, or ask the waiter what they think would pair well with what I've decided to eat  
*Male, 25-29*

## Contented Treaters: Anna

Anna, 38 lives in Adelaide with her 5 year old son, where she works in an international accounting firm



### How does wine fit into your life?

I usually reserve my wine drinking for the weekend when I have bit more time to savour and enjoy it with a nice meal. I wouldn't open a bottle of wine on my own at home. If I go out for dinner with friends, then we will definitely share a bottle over dinner. It is also a social thing for us. I like choose wines that my friends will enjoy and perhaps even introduce them to something I've enjoyed before and they do the same. When I am in a restaurant, I will choose a wine I think will compliment the food we are going to eat but it also really depends on the weather and also who I'm with.

### How do you choose your wine?

I can afford to spend a bit more on wine, and I know that when you spend more on wine you are usually going to get something that is better quality. I have a local bottle shop that I like to go to, and I ask the owner for any new recommendations. They have a good range of wines and I do tend to look where the wine comes from more than what the specific brand is when I choose a wine.

### What wines do you enjoy drinking?

I know what I like to drink and maybe I've become a bit picky over the years, but I usually go straight for a Pinot Noir in winter and a Sauvignon Blanc in the summer. I have developed sort of a list of the ones I really like, and I don't mind spending a little more to enjoy these. Lately, I have have been enjoying Pinot Noirs from New Zealand, which are a little more pricey, but I really enjoy the taste and if I'm only go to drink wine more occasionally, then I want to make sure I really enjoy it!



# Contents page



- Introduction p. 2
- How Portraits works p. 5
- Meet Australia Portraits 2019 & changes since 2016 p. 8
- Australia Portraits 2019
  - Engaged Explorers p. 25
  - Social Newbies p. 39
  - Mainstream Matures p. 51
  - Contented Treaters p. 64
  - Senior Bargain Hunters p. 74
  - Kitchen Casuals p. 81
- Methodology & Appendix p. 89



# Senior Bargain Hunters: overview

Older, infrequent, price-conscious wine consumers, who have built up good wine knowledge over the years but tend to drink from a narrow repertoire of varietals and origins

Brands you might find them drinking include:



Largest segment in terms of number of wine drinkers, but small share of total spend on wine

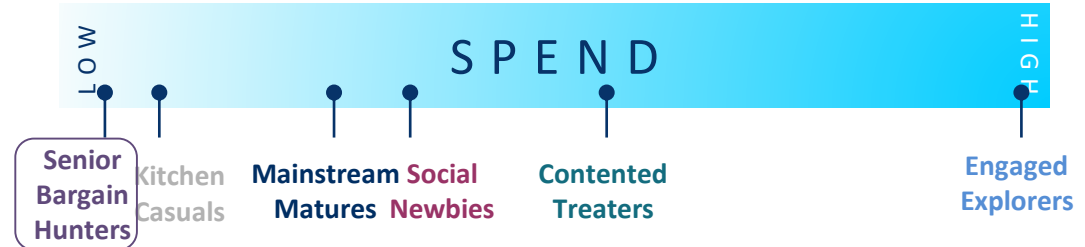
One of the oldest segments, with good knowledge and experience, but low interest in the wine category

Least frequent and 2<sup>nd</sup> lowest spending group of wine drinkers

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



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



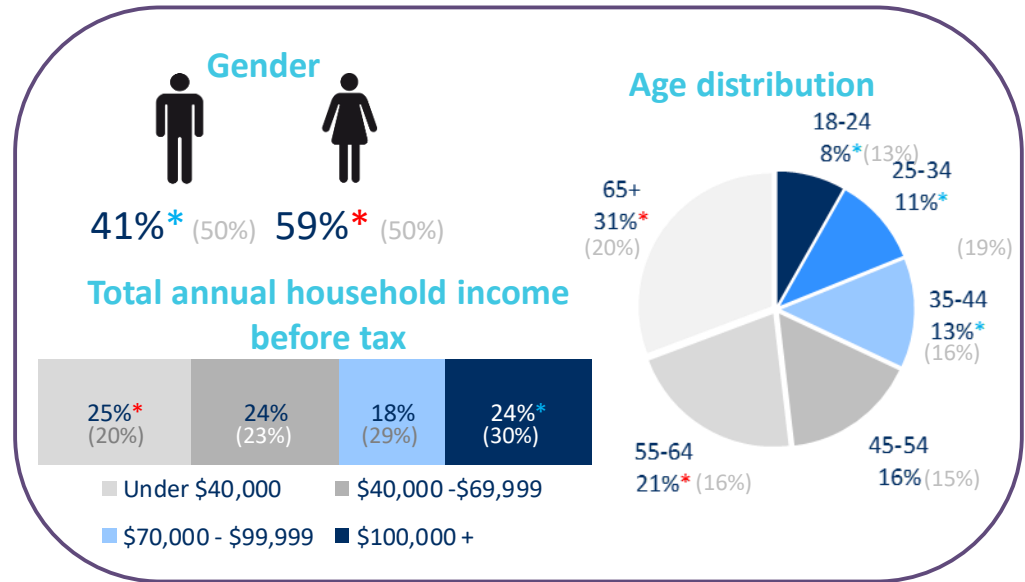
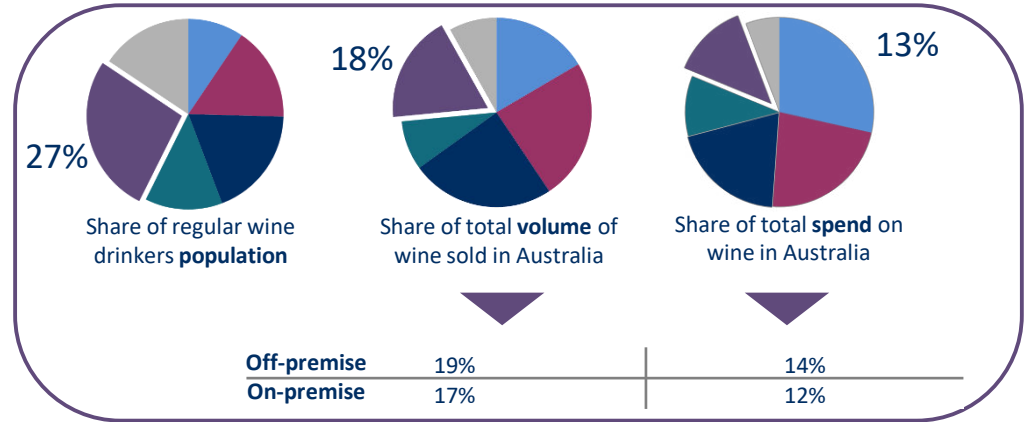
Source: Wine Intelligence, Vinitrac® Australia, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

# Senior Bargain Hunters: Profile

The least frequent, female skewed, older wine drinkers, they are they lowest spending segment with a reasonable wine knowledge but little interest in the category

## What you need to know

- **Older, female skew:** Majority are over 55 and predominantly women that are suburb based.
- **Largest segment:** Represent more than a quarter of the wine drinking population in Australia, however they are infrequent drinkers and overall volume is third highest
- **Low spend:** They are very price-conscious and the lowest spending group, representing only a small share of total spend on wine



( ) All AUS regular wine drinkers

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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

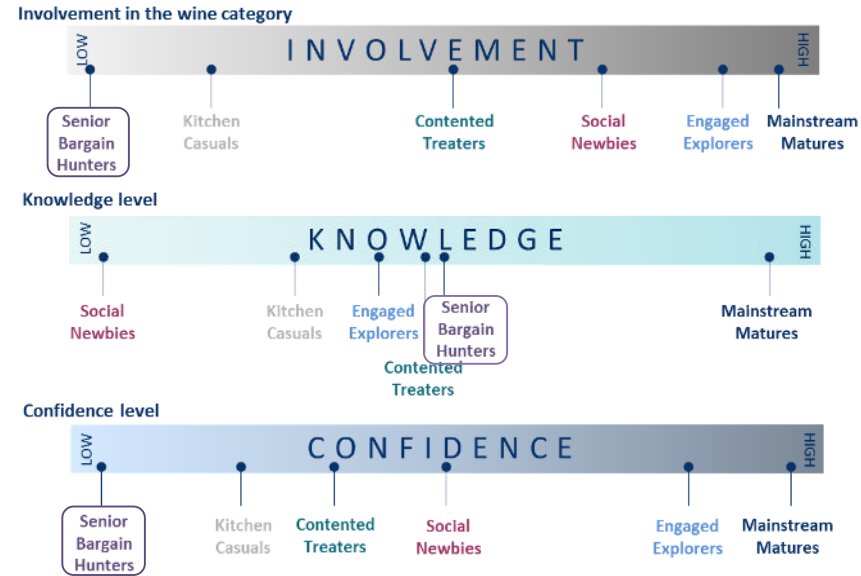
# Senior Bargain Hunters: Involvement, knowledge and confidence

One of the least frequently drinking and the lowest spending groups. They show low involvement in the category



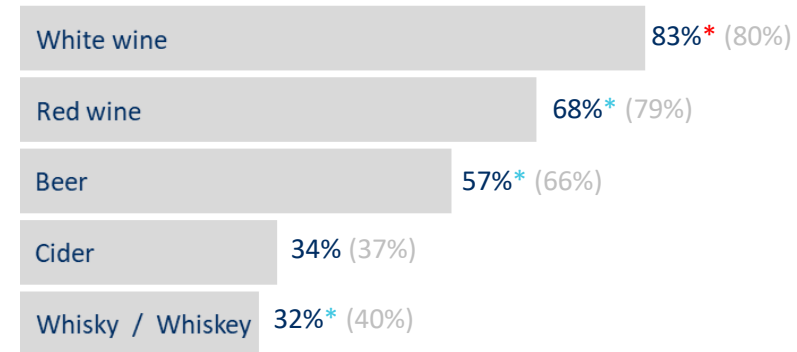
## Wine considered a nice drink to occasionally enjoy

- They are the second least frequently drinking segment, with two thirds only drinking wine once a week and they are the lowest spenders due to their price-conscious nature
- Compared to other segments, Senior Bargain Hunters are more likely to prefer white wine over red wine
- With the lowest level of involvement wine, Senior Bargain Hunters are less likely to integrate wine into their lifestyles, they spend little time or effort in choosing wine and they are less likely to experiment and try new things
- Even though they have gathered some knowledge about wine due to the time spent in the category, they lack confidence and feel that other people know more about wine



## Top 5 alcoholic beverages: Past 12 months

% who drink the following alcoholic beverages



( ) All AUS regular wine drinkers

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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

# Senior Bargain Hunters: What wine do they drink?

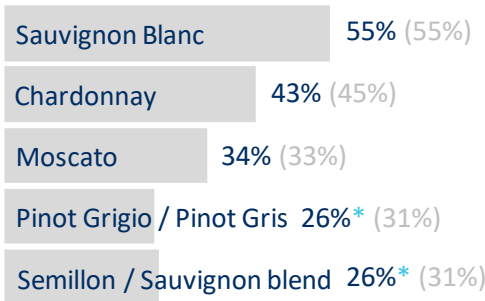
A higher proportion of white wine drinkers, who tend to stick to what they know and have a general unwillingness to broaden their repertoire

## What is their attitudes towards varietals

- They are the only segment with a higher proportion drinking white wine than red wine, with mainstream varietals Sauvignon Blanc and Chardonnay being the key varietals for this segment
- Their lack of experiences with different varietals stems from their habitual behaviour and unwillingness to try new and different styles of wines, tending to sticking to varietals they know and recognise

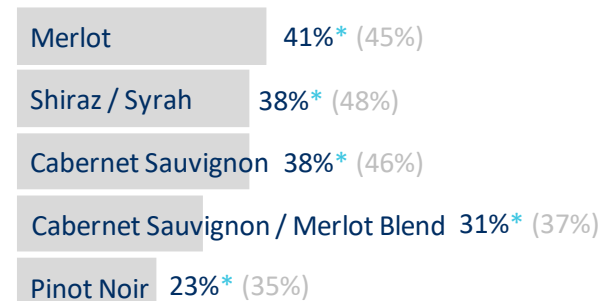
### Top 5 white varietals they consume

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



### Top 5 red varietals they consume

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



( ) All AUS regular wine drinkers

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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

# Senior Bargain Hunters: Brand and wine origin

This segment drinks from a narrow repertoire of varietals and countries, sticking to mainstream varietals they know and domestic wines



## What do they drink?

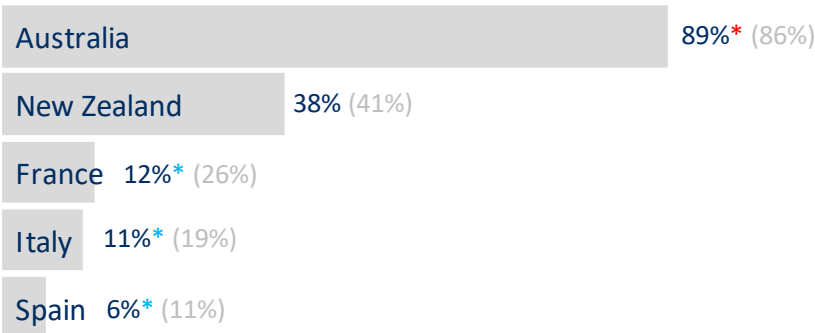
- Even though they have gathered a decent amount of wine knowledge over time, they are drinking from a rather narrow repertoire of wine varietals and origin
- They primarily drink domestic wines and apart from New Zealand, they show less willingness to drink wines from other countries when compared to other wine segments

## Brands you might find them drinking include:



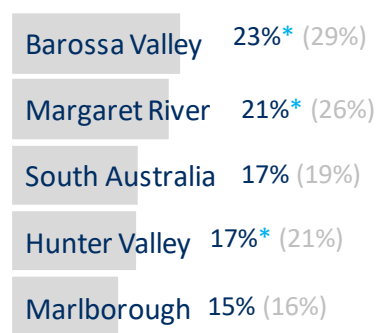
## Top 5 countries of origin consumed

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



## Top 5 regions of origin purchased

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



( ) All AUS regular wine drinkers

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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

# Senior Bargain Hunters: Off- and on-premise behaviour

Less frequent drinking and lowest spenders. They are often looking for promotional offers and seek the best value



## Off-premise behaviour

- They are price sensitive when buying wine, with the highest proportion of consumers claiming they don't mind what they buy as long as the price is right compared to other segments
- Senior Bargain Hunters have the lowest average spend in the off-premise amongst all segments, typically spending less than \$15 per bottle, and one of the lowest in the on-premise, typically spending less than \$20 per bottle

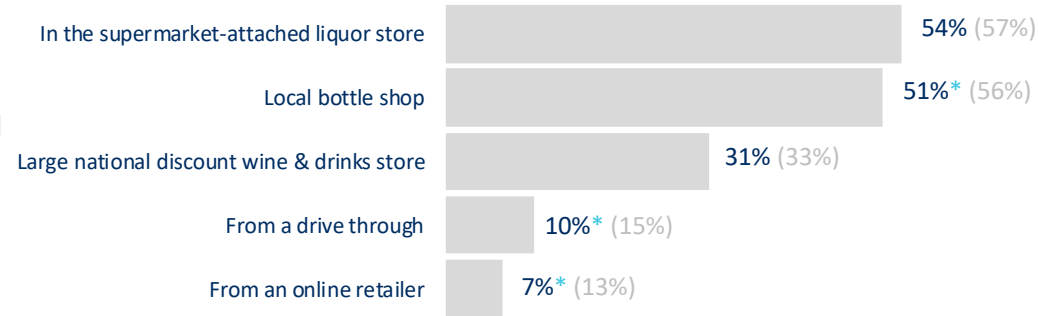


## Off-premise choice cue hierarchy



## Top wine buying channels

% who buy wine through the following channels



## Channels and stores

- They shop for wine from a very narrow range of wine-buying channels and have the highest proportion of consumers stating that they don't buy wine to drink at home
- As consumers who seek lower prices and promotional offers, almost a fifth of consumers in this segment buy wine from Aldi



## Wine in the on-premise

- They drink wine infrequently (typically less than once a month) in the on-premise, and if they drink wine in the on-premise, a higher proportion does so in a restaurant than in a bar or pub

( ) All AUS regular wine drinkers

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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

# Contents page



- Introduction p. 2
- How Portraits works p. 5
- Meet Australia Portraits 2019 & changes since 2016 p. 8
- Australia Portraits 2019
  - Engaged Explorers p. 25
  - Social Newbies p. 39
  - Mainstream Matures p. 51
  - Contented Treaters p. 64
  - Senior Bargain Hunters p. 74
  - Kitchen Casuals p. 81
- Methodology & Appendix p. 89





# Kitchen Casuuls: Overview

One of the older segments who drink infrequently and have a narrow wine repertoire, typically only consuming wine in an in-home environment



More than half are aged over 45 years old

Show little interest in the wine category and drink almost exclusively at home

Infrequent drinkers who spend less on wine and tend to stick to what they know

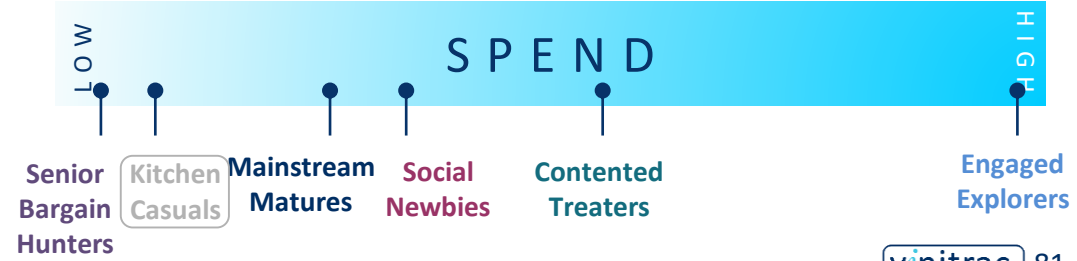
## Brands you might find them drinking include:



### Total wine consumption frequency (off-premise and on-premise)



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



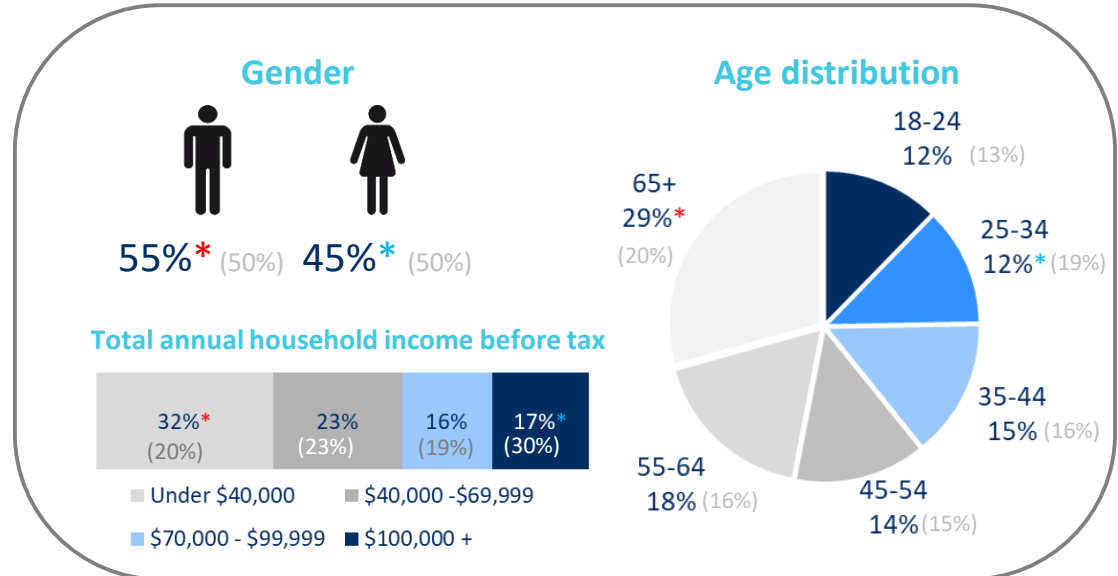
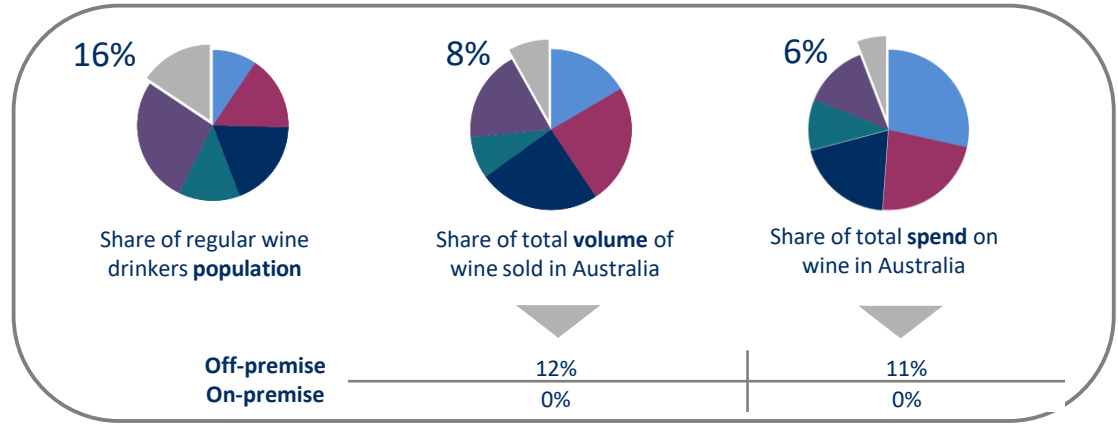
Source: Wine Intelligence, Vinitrac® Australia, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

# Kitchen Casuals: Profile

Older, lower income wine drinkers, that typically live in suburbs and tend not to drink wine in the on-premise

## What you need to know

- **Male skewed:** A significantly higher proportion of men in this segment
- **Older drinkers:** One of the older segments, majority aged 45+ and a higher proportion over 65
- **Suburban:** Often town or suburb-based and in mid-range paying jobs
- **Low spending segment especially in the on-premise.** They have a limited knowledge and interest in wine contributing to their low spend



( ) All AUS regular wine drinkers

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

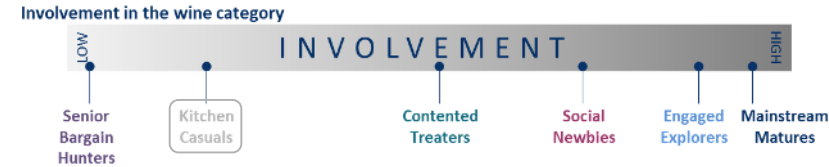
Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

# Kitchen Casuals: Wine involvement

Kitchen Casuals are among the lowest involved segments in Australia, and few show an interest in the category

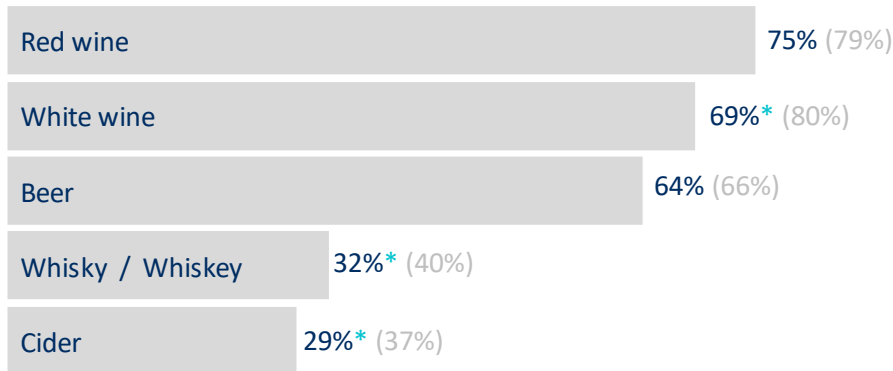
## Not highly involved in the wine category

- Wine is not an active nor important part of the Kitchen Casual lifestyle as they demonstrate low wine involvement and consumption frequency typically consuming wine 1-3 times per month
- While wine is usually their alcoholic beverage of choice, few of them drink wine in the on-premise



## Top 5 alcoholic beverages: Past 12 months

% who drink the following alcoholic beverages



( ) All AUS regular wine drinkers

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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

Wine Intelligence consumer interview programme, see appendix

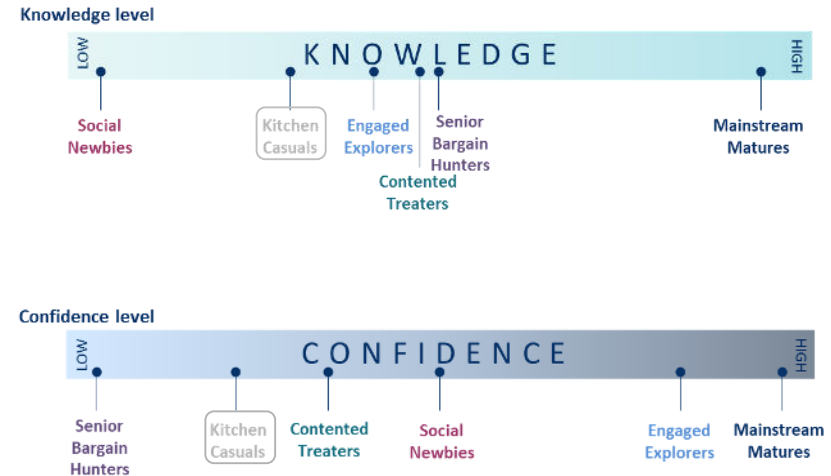
# Kitchen Casuals : Wine knowledge and confidence

Wine is a functional drink of enjoyment for the Kitchen Casual and they lack the motivation or interest to move beyond this



## Lacking in knowledge and confidence

- When talking about their perceived knowledge of wine, Kitchen Casuals believe, compared to others, that they know very little about wine and state that they do not understand much about wine
- They score amongst the lowest in both knowledge and confidence, which can be attributed to their perception of wine as more of a functional drink for enjoyment
- Wine can be seen as a drink for pleasure, but due to a lack of knowledge, Kitchen Casuals are more likely focus more on price than other factors when choosing wine
- Their relatively low awareness of varietals and brands is indicative of their lack of knowledge and confidence



# Kitchen Casuals: What wine do they drink?

Kitchen Casuals are aware of well-known varietals, however, pay less attention to that when drinking wines

## Have trouble recalling varietals

- This segment has the lowest consumption of the top 5 most popular varietals compared to other segments, and this is most likely due to their inability to recall varietals. They rank the highest compared to other wine drinkers on not being able to recall the grape varietal of the wines they drink
- While grape variety ranks highest on the Kitchen Casuals choice cues when purchasing wine, they score the lowest overall compared to other wine drinkers in the level of importance they place on it when choosing a wine



## Top 5 white varietals they consume

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

Sauvignon Blanc	37%* (55%)
Chardonnay	31%* (45%)
Moscato	28%* (33%)
Riesling	22%* (30%)
Semillon / Sauvignon blend	15%* (31%)



## Top 5 red varietals they consume

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

Shiraz / Syrah	39%* (48%)
Merlot	35%* (46%)
Cabernet Sauvignon	35%* (45%)
Cabernet Sauvignon / Merlot blend	26%* (37%)
Pinot Noir	22%* (35%)

( ) All AUS regular wine drinkers

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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

Wine Intelligence consumer interview programme, see appendix

# Kitchen Casuals: Repertoire

Kitchen Casuals rely on a small number of brands that they know, and tend not to know of or purchase wine from outside Australia



## What do they drink?

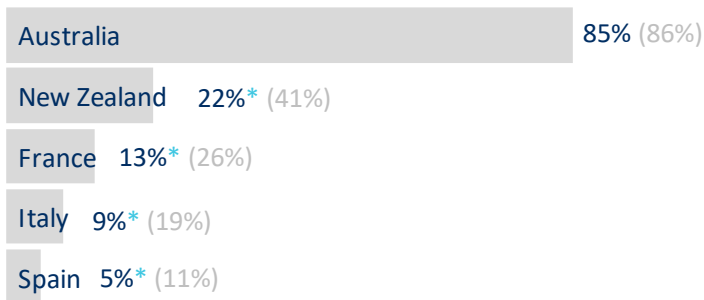
- Brand plays a stronger role in the overall purchase decision for Kitchen Casuals, but they tend to stick to a narrow repertoire of brands that they know
- Kitchen Casuals are less likely to be aware of or purchase wine from countries of origin outside of Australia
- When it comes to region of origin, Kitchen Casuals have reasonable awareness of the top well-known Australian regions such as Hunter Valley, Barossa Valley, Margaret River and Yarra Valley, but this does not translate to purchase, with Kitchen Casuals less likely to purchase wines from these regions compared to the regular wine drinker

## Brands you might find them drinking include:



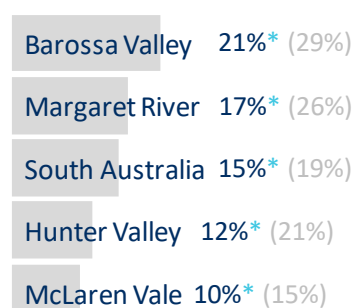
## Top 5 countries of origin consumed

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



## Top 5 regions of origin purchased

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



( ) All AUS regular wine drinkers

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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

Wine Intelligence consumer interview programme, see appendix

# Kitchen Casuals: Off-premise behaviour

Their low level of involvement extends to the purchase process, where they are less likely to plan ahead when purchasing wine



## Off-premise behaviour

- Kitchen Casual's frequency of consumption is the lowest of all regular wine drinkers with the majority only drinking wine one to three times a month
- When they do drink wine, they are more likely to do so as a casual drink at the end of the day or with a meal
- They are price conscious and not likely to spend over \$15 for a bottle



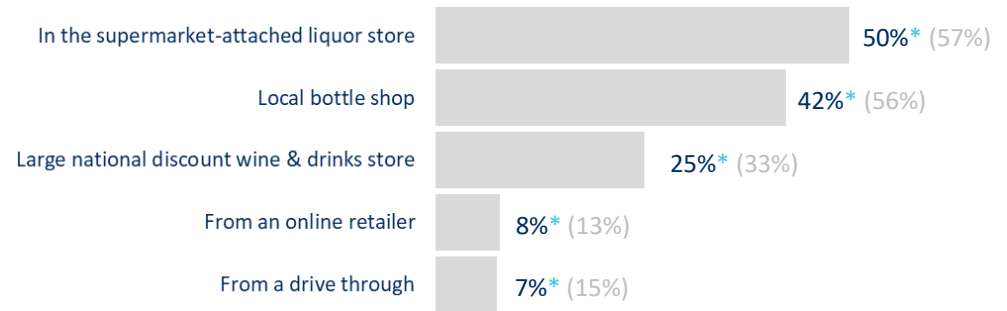
## Wine in the on-premise

- A very small number of Kitchen Casuals consider themselves on-premise drinkers and an even smaller number are likely to purchase wine in a restaurant
- Compared to other segments, Kitchen Casuals have the highest number of people who state that they do not drink on-premise at formal and informal dinners and parties or celebrations



## Top wine buying channels

% who buy wine through the following channels



## Off-premise choice cue hierarchy



( ) All AUS regular wine drinkers

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

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

Wine Intelligence consumer interview programme, see appendix

# Contents page



- Introduction p. 2
- How Portraits works p. 5
- Meet Australia Portraits 2019 & changes since 2016 p. 8
- Australia Portraits 2019
  - Engaged Explorers p. 25
  - Social Newbies p. 39
  - Mainstream Matures p. 51
  - Contented Treaters p. 64
  - Senior Bargain Hunters p. 74
  - Kitchen Casuals p. 81
- Methodology & Appendix p. 89



# Quantitative Methodology

- The quantitative data for this study was collected in surveys in July 2018 and October 2018
- Quantitative data was gathered via Wine intelligence's Vinitrac® online surveys with 4,000 Australian regular wine drinkers
- Respondents were required to drink wine at least once per month, to drink red, white or rosé wine and to buy wine in the off-premise and / or in the on-premise
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The surveys were post-weighted to be representative of Australian regular wine drinkers in terms of gender, age and region
- The distribution of the sample is shown in the table:

		Australia	
		Sample size=	4000
Gender	Male		50%
	Female		50%
	<i>Total</i>		100%
Age	18-24		13%
	25-34		19%
	35-44		16%
	45-54		15%
	55-64		16%
	65+		20%
	<i>Total</i>		100%
Region	Australian Capital Territory		1%
	New South Wales		33%
	Northern Territory		2%
	Queensland		18%
	South Australia		7%
	Tasmania		1%
	Victoria		29%
	Western Australia		9%
	<i>Total</i>		100%

Source: Wine Intelligence, Vinitrac® AUS, July 18, Oct'18 (n=4,000) Australian regular wine drinkers

# Qualitative Methodology: Consumer interviews



## Focus group methodology

- 20 consumer interviews have been conducted via phone or in person
  - 5 x Engaged Explorers
  - 5 x Mainstream Matures
  - 5 x Contented Treaters
  - 5 x Social Newbies
  
- The interviews lasted between 30 and 45 minutes and were done via phone or in person in January and February 2019, covering general wine drinking and buying behaviour and preferences, motivations and attitudes towards wine and purchase choice cues

# Portraits-based wine business strategies

Over the years our clients have used the Portraits report series in a variety of ways to target their high-potential consumers. Here are a few examples of how this consumer segmentation can be used to develop more tailored wine business strategies.

## Portfolio strategy

The first step when selling a product to the Australian market is deciding who the target consumers are. Wine companies have used Australian Portraits to assess where their market opportunity lies by determining to whom their products might appeal, and to design an overall portfolio strategy that is targeted to these consumers.

## Brand health assessment among target Portrait groups

Vinitrac® - our global online wine drinker survey – allows Wine Intelligence to assess brand health among both overall Australian regular wine drinkers and within specific Portraits segments, including looking at trends over time. This can be used to understand with which consumers a brand is strongest and weakest, and to assess competitive positioning among target consumers.

When looking to explore how consumers react to a product's branding in more depth and what conscious and unconscious associations they have with the product, we often conduct focus groups with consumers from targeted Portrait segments, which allows us to build a deeper understanding not only of how the brand is viewed in general, but also how it fits into the wine drinking habits of the specific consumers for whom it is intended.

## New product testing

Newly developed products can be tested with target consumers in a variety of ways. In addition to focus groups, wine companies often ask us to test their product with a larger sample of consumers through hall tests, where we recruit consumers from the target Portrait group to taste the product and provide their feedback on the taste and style.

## Label and packaging testing

To assess how a label or packaging design is positioned relative to its competitors, or how a new label design is perceived by consumers, we often use a combination of focus groups with target consumers to explore their reactions to the packaging combined with label testing with a representative sample of Australian regular wine drinkers through our Vinitrac® survey platform. This allows us to see both how the packaging performs overall, and, importantly, how it performs among its core Portrait group.

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

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

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“Proposal” means the specification of the Syndicated Research Report(s) by WI to the Customer

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“Subscription Products” means Syndicated Research Reports delivered to the Customer periodically as part of an ongoing Agreement

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

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