

# POURTRAITS™

We help our customers to see how their consumers spend their time and money across the On Trade, Off Trade and the burgeoning Third Space. Our pioneering 3 channel Segmentation for ALL Alcohol is the **first of its kind** in the **UK** market.



Experience-led, social butterflies, Revellers are looking for an up-tempo drink to express who they are.



Discerning tastes and a willingness to trade up, Appreciators look for provenance and love to experiment.



Highly engaged across all categories, Enthusiasts drink often and are always looking for something new to try.



Social drinkers by nature, Moderators make efforts to limit their drinking and are less engaged in alcohol.



Most comfortable in low tempo, intimate settings, Unwinders are health conscious and stick to their favourites.



Creatures of habit, Regulars like the familiarity and value of the local.



Health and budget conscious, Avoiders have confidence in their decision not to drink alcohol.

# REVELLERS

Experience-led, social butterflies, Revellers are looking for an up-tempo drink to express who they are.

POURTRAITS™



## Segment statistics

% of GB population	11%
% of total alcohol serves	21%

## Segment habits

Premiumisation	● ● ● ● ●
Experimentation	● ● ● ● ●
Health Conscious	● ● ● ● ●



## Where to find them

% share of serves

On Trade	27%
Natives of the On Trade, Revellers will go out for anything from a catch up to a big night out	
Off Trade	19%
It's all about bonding with others and having a laugh when Revellers drink before going out	
Festivals	
The most festivals engaged group, Revellers especially love overnight music festivals	



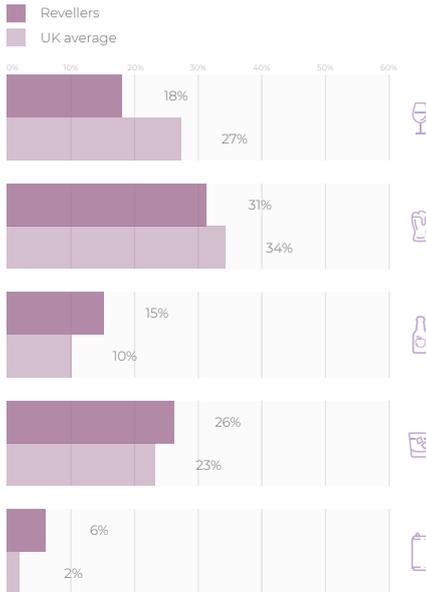
# REVELLERS

Experience-led, social butterflies, Revellers are looking for an up-tempo drink to express who they are.

## POURTRAITS™

### Favourite drink

% share of serves across On & Off Trade



### What's hot

Up tempo drinks for up tempo occasions

Activation: These consumers shop by promotions and offers when choosing Spirits

Premium and standard lager are staples for this group when drinking out of home

RTDs

They like to try new wines or have a broader repertoire

Being alone: they drink out in groups and share their experiences on social media

Budgeting is not their strength

Cash: They prefer contact less payment

Whisk(e)y

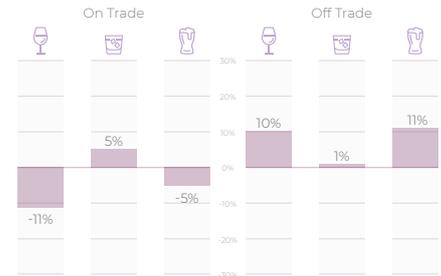
Merlot and New World Wines

### What's not

### Market share % of value share per category



### Average spend category spend vs average



# APPRECIATORS

Fashion-forwards and adventurous, Appreciators are discerning and are the most likely to trade up to a nicer drink

POURTRAITS™



## Segment statistics

% of GB population	11%
% of total alcohol serves	13%

## Segment habits

Premiumisation	● ● ● ● ●
Experimentation	● ● ● ● ●
Health Conscious	● ● ● ● ●



## Where to find them

% share of serves

**On Trade** 13%  
Modern Pubs/Bars and Restaurants. The main factor in choosing where to go is the quality

**Off Trade** 13%  
Quiet nights in as part of a couple, spending quality time, with a drink seen as a reward

## Festivals

Second most likely to visit festivals, Appreciators enjoy music day festivals and poetry/comedy festivals



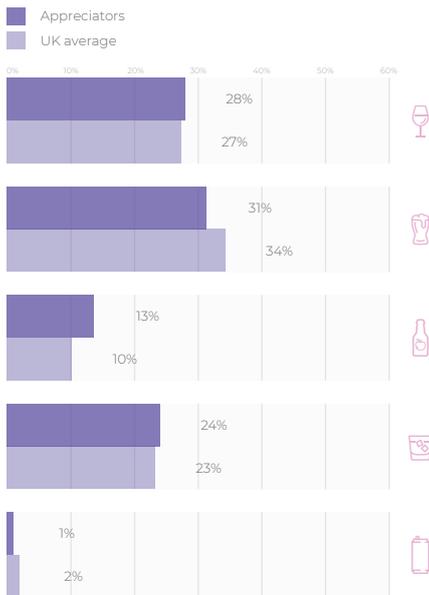
# APPRECIATORS

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POURTRAITS™

## Favourite drink

% share of serves across On & Off Trade



## What's hot

Trying new things across categories

Sparkling Wine is a top favourite

Gin, Spiced Rum and Cream Liqueurs are their favourite spirits

These consumers regularly drink Craft IPA and Craft Pale Ale

A human touch: Recommendations and tasting notes are important when buying wine

Chardonnay and Syrah

Whisk(e)y

These consumers are not fans of Bitter

Blending in: They see drinking as an expression of who they are

Same old: these consumers love to experiment with new drinks

## What's not

## Market share % of value share per category



## Average spend category spend vs average



# ENTHUSIASTS

POURTRAITS™

Highly engaged across all categories, “In the know” Enthusiasts drink often and are always looking for something new to try.



## Segment statistics

% of GB population	14%
% of total alcohol serves	25%

## Segment habits

Premiumisation	● ● ● ● ●
Experimentation	● ● ● ● ●
Health Conscious	● ● ● ● ●



## Where to find them

% share of serves

On Trade 22%

They choose Modern Bars or Wet Led Pubs to catch up with friends, as long as it is convenient!

Off Trade 26%

A quiet drink at home is usual, spending quality time as a couple or just winding down

Festivals

Indifferent to music festivals, Enthusiasts are more likely to visit local community events



# ENTHUSIASTS

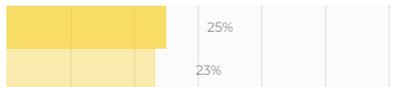
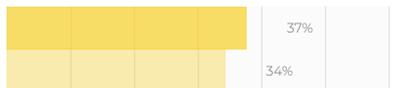
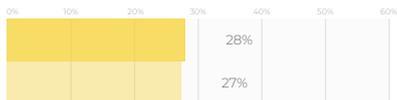
Highly engaged across all categories, "In the know" Enthusiasts drink often and are always looking for something new to try.

POURTRAITS™

## Favourite drink

% share of serves across On & Off Trade

■ Enthusiasts  
■ UK average



## What's hot

Craft beer and Belgian beer

Single Malt Whisk(e)y

Traditional Wine Regions

Argentinian Malbec

A swift one: more likely than average to drink without food in the On Trade

Less interested in New Zealand

Spirit and Fruit Flavoured beer is less likely to interest this group

These consumers are the least likely to drink RTDs

Cabernet Sauvignon is one of few grapes they like less than average

Cutting down: They are far less likely than average to consider Low or No Alcohol alternatives

## What's not

## Market share % of value share per category



## Average spend category spend vs average



# MODERATORS

Social drinkers by nature, easy going Moderators make efforts to limit their drinking and tend to stick to what they know.

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## Segment statistics

% of GB population	10%
% of total alcohol serves	7%

## Segment habits

Premiumisation	● ● ● ● ●
Experimentation	● ● ● ● ●
Health Conscious	● ● ● ● ●



## Where to find them

% share of serves

**On Trade** 8%  
Likely to drink at home due to a special occasion or catch up, mainly to feel part of a group

**Off Trade** 6%  
Likely to drink at home either due to a special occasion, or as part of a catch up mainly to feel part of a group

**Festivals**  
Local community events and other festivals (eg poetry, comedy and hobbies) are popular



# MODERATORS

Social drinkers by nature, easy going Moderators make efforts to limit their drinking and tend to stick to what they know.

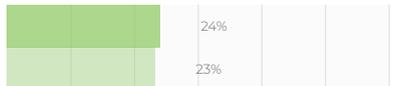
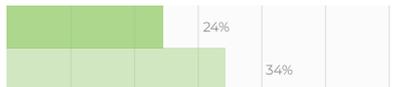
## POURTRAITS™

### Favourite drink

% share of serves across On & Off Trade

Moderators  
UK average

0% 10% 20% 30% 40% 50% 60%



### What's hot

Staying sober: these consumers make a conscious effort to go without alcohol for periods of time

Sweet flavours

Cream Liqueurs, Vodka and Flavoured Vodka

Trialing white varieties including White Rioja, Pinot Gris and Gewurtztraminer

Premium and Standard Lager

Over-doing it: they are concerned about the health effects of drinking

Craft beer and Belgian Beer

Malbec

Region is a less important purchase cue than for the average wine drinker

Spontaneous nights out

### What's not

### Market share % of value share per category



### Average spend category spend vs average



# UNWINDERS

Most comfortable in low tempo and intimate settings, Unwinders are health conscious and like to stick to their favourites.

POURTRAITS™



## Segment statistics

% of GB population	16%
% of total alcohol serves	14%

## Segment habits

Premiumisation	● ● ● ● ●
Experimentation	● . . . .
Health Conscious	● ● ● . .



## Where to find them % share of serves

**On Trade** 8%  
Traditional Pubs and Restaurants, based on the quality of the food and the friendly atmosphere

**Off Trade** 17%  
Unwinders are in their element when staying in as part of a couple, having a quiet night and spending quality time

**Festivals**  
They enjoy local community events but are the least likely to visit a music festival



# UNWINDERS

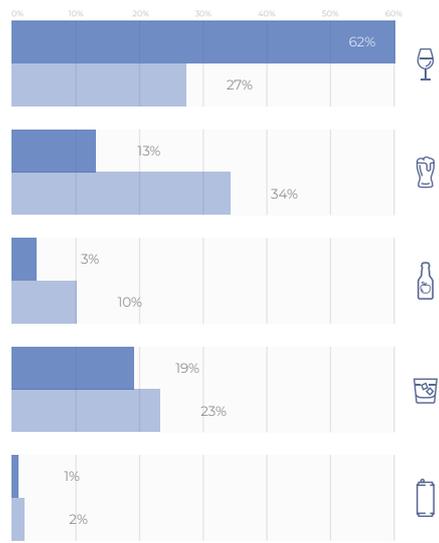
Most comfortable in low tempo and intimate settings, Unwinders are health conscious and like to stick to their favourites.

## POURTRAITS™

### Favourite drink

% share of serves across On & Off Trade

■ Unwinders  
■ UK average



### What's hot

Wine Details: Country and Varietal are more important purchase cues than average

Australia and Italy, but France for special occasions

Gin is a favourite spirit

Producer and locality is how they choose Spirits in the On Trade

Premium Lager

Uncontrolled Spending: Unwinders are good at budgeting

Trying new drinks

Stout, brown and red ale

Vodka

These consumers are the least likely to visit a Music Festival

### What's not

### Market share % of value share per category



### Average spend category spend vs average



# REGULARS

Creatures of habit, Regulars drink often but stick to their preferred category and the familiarity and value of the local.

POURTRAITS™



## Segment statistics

% of GB population	13%
% of total alcohol serves	20%

## Segment habits

Premiumisation	● ● ● ● ●
Experimentation	● ● ● ● ●
Health Conscious	● ● ● ● ●



## Where to find them

% share of serves

On Trade 22%

Regulars by name, regulars by nature. They like to drink often and in their usual Community Pub

Off Trade 19%

When staying in, it's about chilling out and enjoying time to themselves

## Festivals

The most festival averse, Regulars might make an exception for local community events



# REGULARS

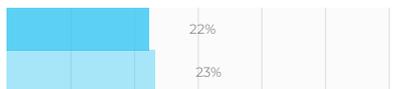
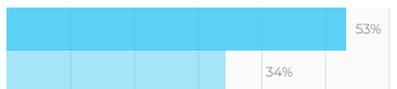
Creatures of habit, Regulars drink often but stick to their preferred category and the familiarity and value of the local.

## POURTRAITS™

### Favourite drink

% share of serves across On & Off Trade

■ Regulars  
■ UK average



### What's hot

Beer: This group drinks more Beer than anyone else

Sticking to what they know: Regulars tend not to experiment with new things

Blended Scotch and Single Malt Whisk(e)y

Tried and Tested Brands: most notably when choosing Spirits

Merlot and Cabernet Sauvignon

Sweet Spirits

Belgian Beer is one Beer style these consumers aren't fond of

Making a scene: Less likely than average to drink to "stand out"

Not likely to visit the On Trade for a meal out

Modern Pubs

### What's not

### Market share % of value share per category



### Average spend category spend vs average



# AVOIDERS

POURTRAITS™

Health and budget conscious, Avoiders have confidence in their decision not to drink alcohol but are interested in trying new things.



## Segment statistics

% of GB population	25%
% of total alcohol serves	0%

## Segment habits

Premiumisation	● . . . . .
Experimentation	● ● ● . .
Health Conscious	● ● ● ● ●



## Where to find them

% share of serves

On Trade 1%

Most pubs will do, either Traditional or Family Pub. Ideally it's clean and has a special offer on food

Off Trade 0%

Planned social occasions where they can have a laugh and take a break

## Festivals

Day music festivals, local community events and others festivals all work for Avoiders



# AVOIDERS

Health and budget conscious, Avoiders have confidence in their decision not to drink alcohol but are interested in trying new things.

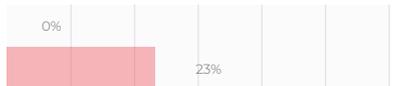
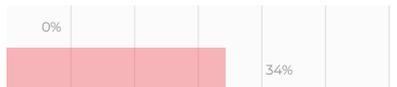
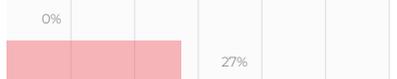
## POURTRAITS™

### Favourite drink

% share of serves across On & Off Trade

■ Avoiders  
■ UK average

0% 10% 20% 30% 40% 50% 60%



### What's hot

Low or No Alcohol alternatives

Budgeting: 8 in 10 say they are good at saving money

Buying local produce wherever possible

Social butterflies: these consumers like to see friends and family more than any other consumer type

On the rare occasion they do drink, its sparkling wine and Champagne they opt for

Nightclubs

Luxury

Going to the same places

Following the crowd: This group are usually the ones who decide where their friends go

Staying overnight at a Festival

### What's not

### Market share % of value share per category



### Average spend category spend vs average

