INSIGHT

ANBL CUSTOMER SEGMENTATION GUIDE

ALCOOL · NB · LIQUOR
BEER SPIRITS WINE
BIÈRES SPIRITUEUX VINS

Understanding Our ANBL Customers Better

VOL. 1 | 2023

On any given day, a wide range of retail customers can be found shopping at ANBL stores and across a variety of ANBL channel partner locations. Consumers of alcohol products in New Brunswick all shop differently and are each unique in their own way.

While we can't know every customer on an individual basis, extensive research allows us to categorize our customers into segments based on the common characteristics they share.

That's where this handbook comes in! This guide distills the research into a digestible format that will help you better understand our customers' buying behaviours, needs, attitudes, and what ultimately drives their decision to make a purchase.

How Does This Help Us?

By building rich descriptions of each customer segment, we have a tool that gives us invaluable insights into:

- Customer opinions, values, and needs
- Customer experience expectations
- Shopping channel preferences
- Preferred product, promotional, and service offerings
- Potential growth opportunities
- How to communicate with and advertise to different segments
- Mass, social, and digital media consumption activities
- Influences on attitudes and shopping behaviours

By knowing consumers at a deeper level, we can tailor our approaches to better meet their needs, whether that be while developing strategies and plans or when face-to-face with customers.

Take this opportunity to learn a little bit more about our customers—who they are, what they need, and what drives their decisions—so we can put them at the centre of each experience and interaction.

ULTRA **UNCOMPLICATED**

CUSTOMER BASE: **33%**

Why?

I drink because **I enjoy the taste.**
53% (↑ 15%*)

I drink to **unwind or relax.** **100%** (↑ 51%*)

Where?

I most often **drink at home.**
83% (↑ 6%*)

With Whom?

I drink with family and friends.
76% (↑ 6%*)

* ↓ Less than average
↑ More than average

Attitudes and Opinions

- **58%** Like to share experiences and opinions with others (↓ 8%*)
- **52%** Health conscious (↓ 8%*)
- **39%** Spontaneous (↓ 9%*)
- **39%** Are interested in pairing food and alcohol (↓ 9%*)
- **38%** Care about what people think of them (↓ 9%*)
- **32%** Try to learn about alcohol products (↓ 10%*)
- **31%** Family and friends look to them for their opinions (↓ 10%*)
- **27%** Enjoy lots of people around (↓ 12%*)
- **27%** Actively involved in community (↓ 10%*)
- **18%** Entertain a lot (↓ 16%*)

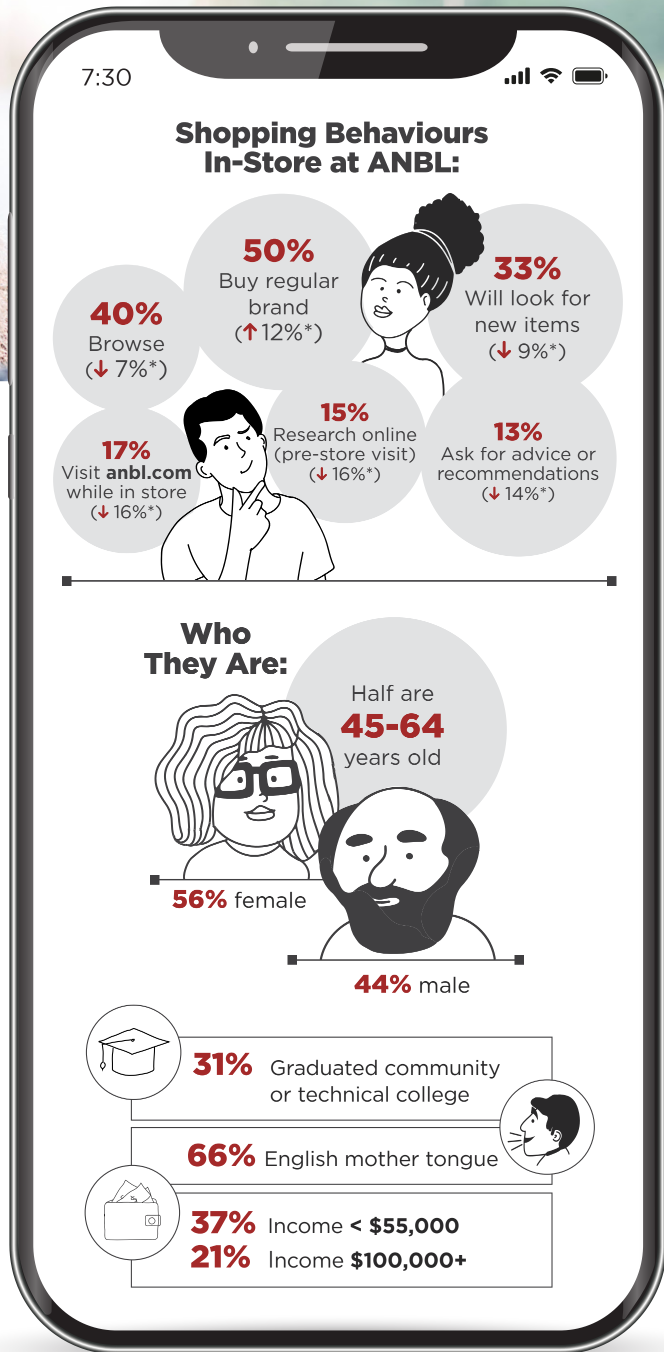
Purchase Locations:

- **58%** ANBL
- **41%** Grocery Store
- **30%** Agency Store (past month)
- **38%** Restaurant/ Bars/Pubs (onsite consumption)
- **17%** Breweries/ Pubs (offsite consumption)

What Do I Buy?

Highest proportion of **Australian wines** (38%) and **white rum** (34%).

More likely to buy **beer by the can**.



Purchase Highlights:

Buy all categories of products, but a little less of everything than all other segments.

Most likely to restock their home bar or fridge
55% (↑ 11%)

Least likely to buy as a gift
18% (↓ 9%)

Segment Insights

Due to its sheer size, this is an important segment, but these customers believe that their needs are already being met. Because this segment is less likely to ask for advice, browse the store, or research products, it is important to provide **high-quality service** and **strong product recommendations** when opportunities to recommend new or different products arise.

EXPERIENTIAL ENTERTAINER

CUSTOMER BASE: **20%**

Why?

I drink because **I enjoy the taste.**
100% (↑ 62%*)

I drink for **enjoyment.** **62%** (↑ 13%*)

Where?

I most often **drink at home.**
79% (↑ 2%*)

With Whom?

I drink with **small groups of friends** and **personal experiences** are important to me.

* ↓ Less than average
↑ More than average

Attitudes and Opinions

59% Are very interested in pairing alcohol and food (↑ 11%*)

47% Entertain a lot (↑ 13%*)

Purchase Locations:

67% ANBL	**46%** Grocery Store	**47%** Agency Store (past month)	**50%** Restaurant/ Bars/Pubs (onsite consumption)	**40%** Breweries/ Pubs (offsite consumption)

Shopping Behaviours In-Store at ANBL:

- **54%** Browse (↑ 7%*)
- **49%** Look for new products (↑ 7%*)
- **39%** Visit **anbl.com** while in store (↑ 6%*)
- **35%** Research online (pre-store visit) (↑ 4%*)
- **34%** Ask for advice or recommendations (↑ 7%*)

Who They Are:

37% are **19-34**
28% are **35-54**
35% are **55+**
years old

59% male

41% female

43% University & post grad (highly educated)

68% English mother tongue

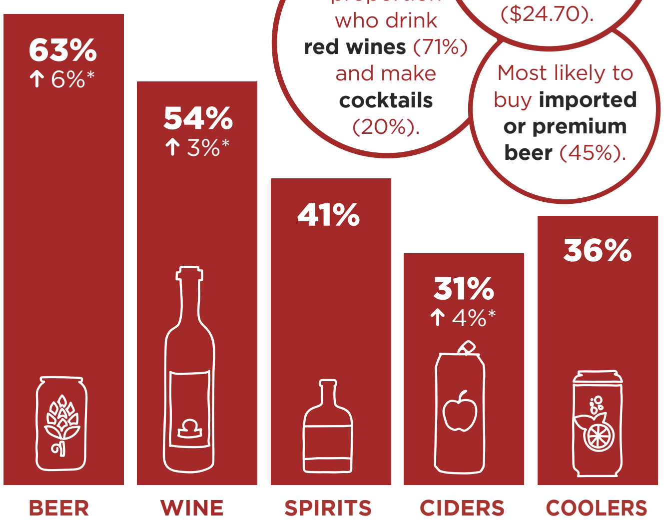
27% Income **< $55,000**
25% Income **$100,000+**

What Do I Buy?

Highest weekly spend on **spirits** ($31.50) and **coolers** ($24.70).

Highest proportion who drink **red wines** (71%) and make **cocktails** (20%).

Most likely to buy **imported or premium beer** (45%).



Purchase Highlights:

- Buy **everything** and on par with averages.
- Consume alcoholic beverages **weekly, at all times of the year**.

Segment Insights

Even though this segment is already one of the highest spending segments, they offer additional potential when it comes to premiumization, innovation, and trying **new or different products** because it's entirely about "the experience". They entertain, are interested in food pairings, browse in store, and are **willing to get advice**.

HOT DEAL **HOMEBODY**

CUSTOMER BASE: **9%**

Why?

I drink to **take my mind off other things.**
100%
(↑ 79%*)

I drink to **unwind or relax.**
94%
(↑ 45%*)

Where?

I most often drink **at home.**
85% (↑ 8%*)

With Whom?

I most often drink **alone.**
64%
(↑ 29%*)

* ↓ Less than average
↑ More than average

Attitudes and Opinions

54% Do not like to entertain (↑ 9%*)

54% Prefer to spend time alone (↑ 14%*)

58% Are not actively involved in community (↑ 11%*)

70% Not spontaneous (↑ 12%*)

Purchase Locations:

69% ANBL	**41%** Grocery Store	**25%** Agency Store (past month)	**27%** Restaurant/ Bars/Pubs (onsite consumption)	**27%** Breweries/ Pubs (offsite consumption)

Shopping Behaviours In-Store at ANBL:

- **38%** Look for new items (↓ 4%*)
- **33%** Visit **anbl.com** while in store
- **30%** Browse (↓ 17%*)
- **28%** Research online (pre-store visit) (↓ 3%*)
- **18%** Ask for advice or recommendations (↓ 9%*)

Who They Are:

47% are **34-54** years old

64% female

36% male

Lowest level of university graduates	**Highest level** of high school or less (36%)

39% French mother tongue

57% Income **< $55,000**
10% Income **$100,000+**

What Do I Buy?

More likely to buy **Rosé** (44%).

Stick to **mainstream beers** (77%).

Purchase Highlights:

- Much more likely than all other segments to **purchase for immediate consumption** at home.
- **Shop sales** and **buy bundles** based on perception of value.

Sale

Segment Insights

Because of the size of the segment and their spend levels, this segment offers limited growth potential. However, being **motivated by value and promotion**, they could be encouraged to buy more in one transaction if there is good perceived value or worthwhile volume discounts.

POLISHED **PLANNER**

CUSTOMER BASE: **23%**

Why?

I drink as a **regular part of being with friends or family.**
100% (↑ 70%*)

I'm **less likely** to drink to unwind or relax or because I enjoy the taste.

Where?

I'm **less likely** to drink at home.
69% (↓ 8%*)

A little **more likely** than other segments to drink at all other locations.

With Whom?

I drink **with friends and family**; it's a normal part of my social life.

I'm **less likely** to drink alone. **26%** (↓ 9%*)

* ↓ Less than average
↑ More than average

Attitudes and Opinions

58% Care what people think of them (↑ 11%*)

52% Enjoy having lots of people around (↑ 13%*)

45% Entertain a lot (↑ 11%*)

Purchase Locations:

68%	**47%**	**44%**	**56%**	**41%**
ANBL	Grocery Store	Agency Store (past month)	Restaurant/ Bars/Pubs (onsite consumption)	Breweries/ Pubs (offsite consumption)

Cross-Border Shop for Alcohol:

36% QC (↑ 9%) | **34%** US (↑ 9%) | **36%** NS (↑ 12%)

Shopping Behaviours In-Store at ANBL:

- **49%** Browse (↑ 2%*)
- **44%** Research online (pre-store visit) (↑ 13%*)
- **41%** Will look for new items (↓ 1%*)
- **40%** Visit **anbl.com** while in store (↑ 7%*)
- **32%** Ask for advice or recommendations (↑ 5%*)

Who They Are:

38% are **19-34**
28% are **35-54**
33% are **55+**
years old

50% male

50% female

57% University & post grad (highest levels of education)

66% English mother tongue

28% Income **< $55,000**
24% Income **$100,000+**

What Do I Buy?

Slightly more likely to buy **Canadian whiskey**, **liqueurs**, **scotch**, **dark and amber rums**.

Highest purchasers of **ciders** and most likely to buy **flavoured ciders** ($28.70/week).

Purchase Highlights:

- Buy **established** and **well-known brands**.
- **Purchase alcohol products for every use occasion**: immediate and future consumption, to restock, for special occasions and gifts.

Segment Insights

This segment offers potential to **trade up in price or perceived quality**. They are **open to trying new products** and **want to be a good host** and impress guests.

DARING **DISCOVERER**

CUSTOMER BASE: **16%**

Why?

I drink to pair **with food.**
44%

I drink to help **create a mood or feeling.**
40%

I drink to be **more outgoing or social.**
40%

I drink for **possible wellness benefits.**
28%
(↑ 17%*)

With Whom?

Most often, I drink **with friends.**

Where?

I'm **less likely** to drink at home.
65%
(↓ 12%*)

* ↓ Less than average
↑ More than average

Attitudes and Opinions

72% Are health conscious (↑ 12%*)

57% Are spontaneous (↑ 9%*)

49% Say that well-known brands are important to them (↑ 7%*)

43% Entertain more than average (↑ 9%*)

Purchase Locations:

66% ANBL	**53%** Grocery Store	**51%** Agency Store (past month)	**55%** Restaurant/ Bars/Pubs (onsite consumption)	**46%** Breweries/ Pubs (offsite consumption)

Cross-Border Shop for Alcohol:

42% QC (↑ 15%) | **40%** US (↑ 15%) | **37%** NS (↑ 13%)

What Do I Buy?

- Most likely to like **all beer styles** (40%).
- Most likely to buy **sparkling wines** (36%).
- Most likely to buy **tequila** (28%).
- Most likely to buy **South American wines** (27%).

BEER	WINE	SPIRITS	CIDERS	COOLERS
65% ↑ 8%*	**57%** ↑ 6%*	**58%** ↑ 17%*	**38%** ↑ 11%*	**42%** ↑ 6%*

Purchase Highlights:

- **Most likely to learn** about alcohol products that they buy.
- Most likely to agree that **pairing food and alcohol** products interests them.
- **Highest monthly purchase** in every category except coolers.
- **Highest weekly spend** on **beer** ($38.40) and **wine** ($31.20).

Shopping Behaviours In-Store at ANBL:

- **57%** Browse (↑ 10%*)
- **49%** Visit **anbl.com** while in store (↑ 16%*)
- **56%** Look for new items (↑ 14%*)
- **41%** Research online (pre-store visit) (↑ 10%*)
- **45%** Ask foradvice or recommendations (↑ 18%*)

Who They Are:

50% are **under 35** years old

Skews female

Highest level of some college/ university due to age

54% English
42% French (highest level of French-speaking)

28% Income **< $55,000**
19% Income **$100,000+**

Segment Insights

Even though this segment is already a high-spending segment, they offer potential because of their **interest in entertaining, alcohol products and food pairing**, and because they **research and will seek out recommendations and advice**. Health consciousness is also of interest to them, which includes products that offer lower calories, lower sugar, gluten-free, and other options that that are perceived to be more **health-conscious alternatives.**

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