GLOBAL WINE BRAND POWER INDEX
THE MOST POWERFUL 15 WINE BRANDS IN 15 KEY WINE MARKETS

March 2018 Report

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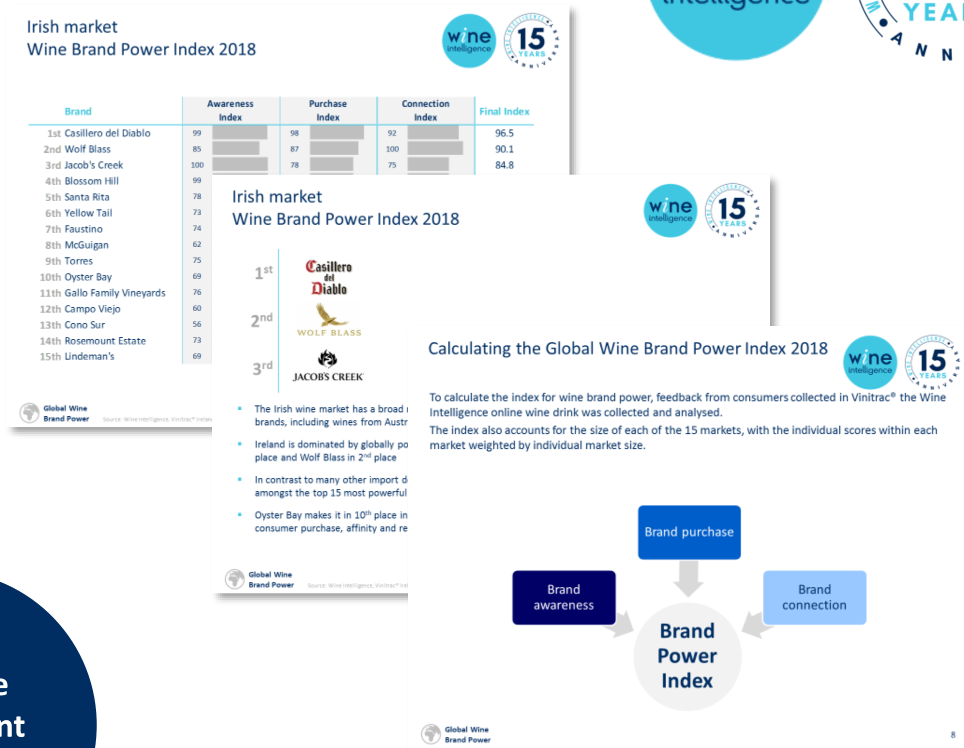

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Global Wine Brand Power Index:

The Most Powerful 15 Wine Brands In 15 Key Wine Markets

How powerful are brands in the wine category? The stock answer, “not as powerful as beer or spirits brands,” doesn’t seem good enough in an era where brand equity more than ever, determines long-term success – and failure – in global markets.

To address this, and also mark the 15th anniversary of Wine Intelligence, we have developed the first ever Global Wine Brand Power Index, based on input from 16,000 wine consumers in 15 key global wine markets, representing 380 million wine drinkers.

What makes a wine brand “powerful” from a consumer perspective? One fairly obvious measure could be sales volumes, but this measure is subject to variances such as promotions and retailer relationships. Such sales data is also widely available.

Instead, we have adopted a more nuanced approach, using the latest branding theory and also some old-fashioned simplicity. Consumer awareness is a clear driver of brand power, but brand power also results from measures relating to both brand purchase and conversions as well as brand connection. We have also taken into account future purchase consideration for each brand.

Finally, we also incorporated consumer feedback in terms of their levels of both brand affinity and brand recommendation.

The result is our Global Wine Brand Power Index 2018, incorporating consumer feedback on these six key brand health measures and offering a power rank at both a country level and across all 15 markets, with the individual scores within each market weighted by individual market size.

And which wine brands are the most powerful globally in 2018?

Yellow Tail is the most powerful wine brand across these 15 markets according to wine drinkers, followed at #2 by Casillero del Diablo, resulting in both Australian and Chilean brands over-performing in terms of wine brand power in relation to the size of wine production in these countries.

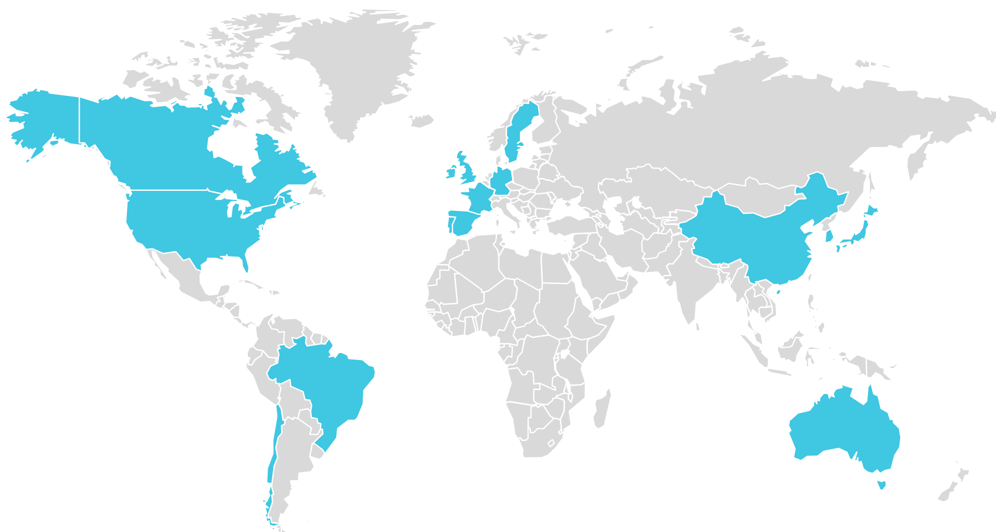
In addition, US wine brands rank highly in the Global Wine Brand Power Index 2018, in part due the large proportional size of the US domestic wine market but also resulting from the high proportion of domestic wine consumed within the US market.

Lulie Halstead, Founder and CEO, Wine Intelligence

Global Brand Power Index markets

15 countries were chosen to represent the most important and influential markets for wine

Australia
Brazil
Canada
Chile
China
France
Germany
Ireland



Japan
Portugal
South Korea
Spain
Sweden
UK
USA

Representative of **380 million** wine drinkers

Feedback from **16,000** wine drinkers in 15 markets

The global index is weighted to account for **number of wine drinkers** in each market

Calculating the Wine Brand Power Index

Each Vinitrac® survey is representative of adults who drink wine in that market.

For the Global Wine Brand Power Index, we selected 15 key wine markets which have the following number of wine drinkers

Market:	Sample size of survey:	Representative of:
Australia	1,000 Australian regular wine drinkers	10m adults (aged 18+)
Brazil	1,000 Brazilian regular wine drinkers	52m adults (aged 18-64)
Canada	1,000 Canadian regular wine drinkers	16.7m adults (aged 19+)
Chile	700 Chilean regular wine drinkers in key urban areas	3.3m adults (aged 18-64)
China	1,006 Chinese urban upper-middle class semi-annual imported wine drinkers	51.6m adults (aged 18-54)
France	983 French regular wine drinkers	34m adults (aged 18+)
Germany	1,000 German regular wine drinkers	27.5m adults (aged 18+)
Ireland	1,000 Irish regular wine drinkers	2m adults (aged 18+)
Japan	1,000 Japanese regular wine drinkers	30m adults (aged 20+)
Portugal	1,000 Portuguese regular wine drinkers	4.4m adults (aged 18+)
South Korea	1,000 South Korean semi-annual wine drinkers of imported grape-based wine	10m adults (aged 19-59)
Spain	1,000 Spanish regular wine drinkers	11.9m adults (aged 18+)
Sweden	1,000 Swedish regular wine drinkers	4.3m adults (aged 18+)
UK	1,000 UK regular wine drinkers	28.6m adults (aged 18+)
US	2,003 US regular wine drinkers	95m adults (aged 21+)

Research Methodology

Vinitrac

How does Vinitrac® work?

1) Defining the right samples:

- Wine Intelligence, with the support of global research companies (e.g. TNS, YouGov), regularly runs calibration studies in each market in order to define demographic specifications of the wine consumers and the size of the market (i.e. penetration of wine consumption)

2) Running the online survey:

- Invitations to participate in an online survey programmed by Wine Intelligence are then distributed to residents in each market
- Respondents are directed to a URL address, which provides access to the online survey
- Based on given criteria (e.g. age, beverage, frequency of wine consumption) respondents will either proceed or screen out of the survey
- Wine Intelligence monitors completed responses to build samples representative of the target markets' wine drinking population based on the most recent calibration study

3) Cleaning the data:

- When a representative sample is logged, the survey is closed
- Wine Intelligence will then clean out all invalid data points (e.g. those who sped through the survey or gave inconsistent answers to selected questions) and weight the data in order to ensure representability

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