WINE INTELLIGENCE

GLOBAL WINE BRAND POWER INDEX 2020

THE MOST POWERFUL 15 WINE BRANDS IN 21 KEY MARKETS

March 2020 Report

CONTENTS

GLOBAL WINE BRAND POWER 2019 vs. 2020

In 2019, we incorporated consumer feedback from six key brand health measures and calculated a brand power index at both country and global levels across 20 key wine markets; resulting in the **second annual Global Wine Brand Power Index**. Some markets have been removed from this year's report, including: Chile, Denmark and Switzerland, due to data availability. To maintain the regional influence of those countries and gain a more comprehensive understanding of wine brand power throughout the world, **the 2020 Global Wine Brand Power Index includes four additional markets — Colombia, Finland, Hong Kong** and **Mexico.**

Additionally, the 2020 Global Wine Brand Power report also includes **tracking against the markets examined in the 2019 Global Wine Brand Power Index to better understand how top brand performance in each market has, or has not, changed within the past year**. **Ranking differences**, along with the corresponding **final index score differences** are included both on a global level and individual country level. Ranking differences are coded as follows:

Increase in ranking position since 2019

Decrease in ranking position since 2019

= **No change** in ranking position since 2019

n/a **Tracking unavailable** as brand first tested in 2020

Note: Because the four new markets introduced in the 2020 Global Wine Brand Power Index were not included in the 2019 report, tracking for them at an individual country level is not available for this report

GLOBAL WINE BRAND POWER INDEX MARKETS

In the 2020 report, we cover 21 key wine markets across the globe

wine intelligence

Australia

Belgium

Brazil

Canada

China

Colombia*

Finland*

France

Germany

Hong Kong*

Ireland
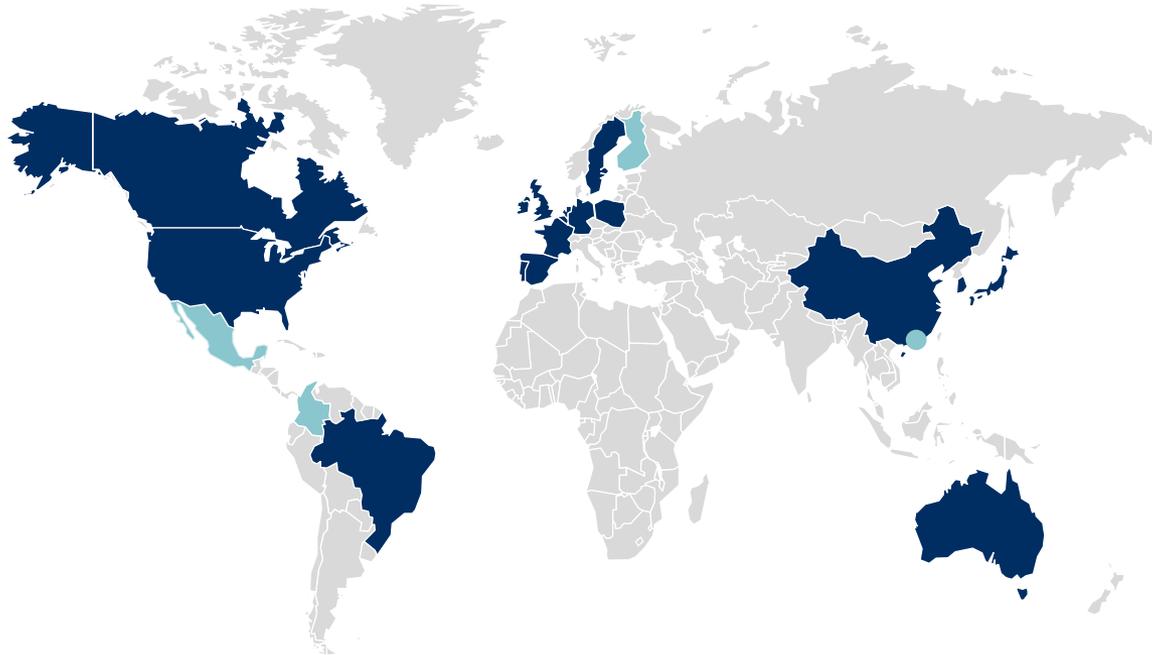
Japan

Mexico*

Netherlands

Poland

Portugal

South Korea

Spain

Sweden

UK

US

* = new market added for 2020 edition

Representative of **380 million** wine drinkers

Feedback from over **20,000** wine drinkers

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

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CALCULATING THE WINE BRAND POWER INDEX

The Global Wine Brand Power Index is based on data collected via **Vinitrac®**, the Wine Intelligence online wine drinker survey

What is Vinitrac®?

Vinitrac® is the Wine Intelligence wholly-owned **global survey of wine drinkers, which monitors and tracks the attitudes and behaviours of wine consumers around the world**. It also measures consumers' perception of 30 to 70 key wine brands per market (the number and list of brands tested is tailored to each market to ensure that the relevant brands are tested) and measures the following factors:

Brand **awareness**   Brand **purchase**   Brand **conversion**   Brand **consideration**   Brand **affinity**   Brand **recommendation**
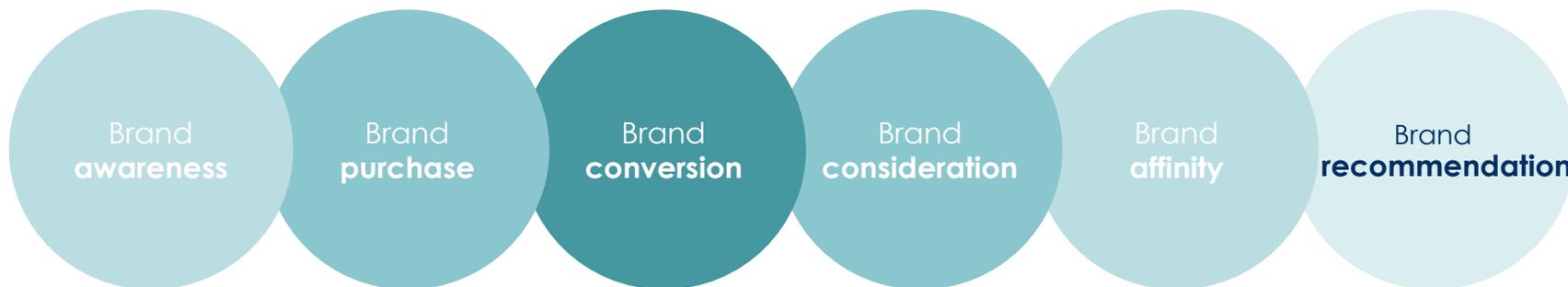
Each Vinitrac® survey is representative of adults who drink wine in that market

BRAND HEALTH MEASURES INCLUDED

Awareness

% who have heard of each brand (when prompted with a list of brand names with logos)
Base = All wine drinkers

Brand awareness index

Purchase

% who have bought each brand in the past 3 months
Base = All wine drinkers

Conversion

% who have bought each brand in the past 3 months
Base = Those who have heard of each brand

Brand purchase index

Consideration

% who would consider buying each brand
Base = Those who have heard of each brand

Brand Power index

Affinity

% who think each brand is right for people like them
Base = Those who have heard of each brand

Recommendation

% who would recommend each brand to a friend
Base = Those who have heard of each brand

Brand connection index

Note: The brands tested in each market change from year to year as brands grow and decline in importance within a given market, as well as to include high profile brand launches

HOW THE BRAND POWER INDEX WORKS

The Global Wine Brand Power Index measures the health of a wine brand via prompted consumer awareness, recalled purchase & future purchase intent, and the consumer connection with the brand, measured by their willingness to recommend it to others and level they feel the brand is right for people like them.

This measure does not take account of sales volumes or value, sales trends over time or opinions of those in the supply chain and / or influencers / media. Experienced marketers tell us they use the Global Wine Brand Power Index score recorded here in conjunction with such other measures of brand success such as sales and trade sentiment to form a more holistic view of their brand's "power".

Characteristics of a successful brand in the Wine Intelligence Brand Power Index

With this, the third edition of the Wine Intelligence Brand Power Index, some experienced readers may be growing familiar with some of the recurring themes in terms of how brands achieve success using the component measures of the index.

To achieve success at a national market level, the main engine appears to be widespread awareness. Perhaps not surprisingly, there is a fairly strong correlation between awareness levels and recalled purchase incidence / purchase consideration; so a strong score in one is likely to yield a strong score in the other. There is also a detectable link between awareness and connection, though the correlation here is weaker. Some high awareness brands may yield indifference amongst their aware base; more niche brands may outperform because their connection scores are very high, making up for lack of awareness.

To achieve success at the global level, the equation is less complex. As Woody Allen once said, "90% of success is showing up", and this aphorism appears to have substance within the Global Brand Power Index. The key driver of success is presence in most, if not all, markets within the scope of the Index. As the Index is weighted by size of wine drinking population, having a particularly strong score in large markets will make up for lower scores in smaller ones. On the other hand, consistently good (but not leading) performances in many markets can also produce a top 5 global result.

METHODOLOGY: AUSTRALIA

Vinitrac® Australia

- The data for this report was collected in Australia in October 2018 and October 2019

- Data was gathered via Wine Intelligence's Vinitrac® online survey

- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-premise 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 data is representative of Australian regular wine drinkers in terms of gender, age and state

- The distribution of the sample is shown in the table

		Oct-18	Oct-19
	n=	1,000	1,000
Gender	Male	50%	54%
	Female	50%	46%
	Total	**100%**	**100%**
Age	18-24	13%	9%
	25-34	19%	19%
	35-44	16%	18%
	45-54	15%	19%
	55-64	16%	16%
	65 and over	20%	19%
	Total	**100%**	**100%**
Regions	Australian Capital Territory	1%	1%
	New South Wales	33%	33%
	Northern Territory	2%	1%
	Queensland	18%	20%
	South Australia	7%	7%
	Tasmania	1%	3%
	Victoria	29%	25%
	Western Australia	9%	9%
	Total	**100%**	**100%**

METHODOLOGY: BELGIUM

Vinitrac® Belgium

- The data for this survey was collected in Belgium in July 2018 and January 2020

- Data was gathered via Wine Intelligence's Vinitrac® online survey:

- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade

- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

- The data is representative of Belgian regular wine drinkers in terms of gender, age and region

- The distribution of the sample is shown in the table

		Jul-18	Jan-20
	n=	1,000	1,000
Gender	Male	55%	52%
	Female	45%	48%
	Total	**100%**	**100%**
Age	18-24	7%	7%
	25-34	15%	13%
	35-44	16%	15%
	45-54	18%	18%
	55-over	43%	47%
	Total	**100%**	**100%**
Region	Brussels	11%	11%
	South (French) Belgium - Wallonid	34%	34%
	North (Flemish) Belgium - Vlaanderen	55%	55%
	Total	**100%**	**100%**

METHODOLOGY: BRAZIL

Vinitrac® Brazil

- The data for this report was collected in Brazil in July 2018 and October 2019

- Data was gathered via Wine Intelligence's Vinitrac® online survey

- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade

- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

- The data is representative of Brazilian regular wine drinkers in terms of gender, age and region

- The distribution of the sample is shown in the table

		Jul-18	Oct-19
	n=	1,000	1,000
Gender	Male	53%	53%
	Female	47%	47%
	Total	**100%**	**100%**
Age	18-24	16%	12%
	25-34	30%	29%
	35-44	24%	26%
	45-54	19%	19%
	55-64	11%	14%
	Total	**100%**	**100%**
Region	North	5%	7%
	Bahia	8%	6%
	North East (outside Bahia)	20%	20%
	Espírito Santo + Minas Gerais	10%	11%
	Rio de Janeiro	10%	10%
	São Paulo	26%	24%
	South	16%	15%
	Midwest	6%	8%
	Total	**100%**	**100%**

METHODOLOGY: CANADA

Vinitrac® Canada

- The data for this survey was collected in Canada in October 2018 and October 2019

- Data was gathered via Wine Intelligence's Vinitrac® online survey

- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-premise 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 data is representative of Canadian regular wine drinkers in terms of gender, age and Province

- The distribution of the sample is shown in the table

		Oct-18	Oct-19
	n=	1,000	1,000
Gender	Male	50%	51%
	Female	50%	49%
	Total	100%	100%
Age	19-24	9%	7%
	25-34	20%	22%
	35-44	22%	18%
	45-54	13%	17%
	55-64	18%	17%
	65 and over	18%	20%
	Total	100%	100%
Province	Québec	25%	25%
	Ontario	39%	38%
	West	30%	31%
	Other Provinces	5%	5%
	Total	100%	100%

METHODOLOGY: CHINA

Vinitrac® China

- The data for this study was collected in China in October 2018 and October 2019

- Data was gathered via Wine Intelligence's Vinitrac® online survey

- The respondents in both waves meet the following requirements:

  - Urban upper-middle class: personal monthly income before tax at least 6,000 RMB in Beijing, Guangzhou, Shanghai, Hangzhou and Shenzhen; or 5,000 RMB in Wuhan, Chengdu, Shenyang, Chongqing, Changsha, Zhengzhou and Guiyang

  - 18-54 years old

  - Residents of Beijing, Guangzhou, Shanghai, Wuhan, Chengdu, Shenyang, Hangzhou, Shenzhen, Chongqing, Changsha, Zhengzhou and Guiyang

  - Drink imported grape-based wine at least twice a year

- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

- The data is representative of Chinese urban upper-middle class imported wine drinkers in terms of gender, age, city and personal monthly income before tax

- The distribution of the sample is shown in the table

		Oct-18	Oct-19
	n=	1,000	1,640
Gender	Male	53%	53%
	Female	47%	47%
	Total	**100%**	**100%**
Age	18-29	34%	31%
	30-39	29%	33%
	40-54	37%	36%
	Total	**100%**	**100%**
City	Shanghai, Hangzhou	20%	25%
	Beijing	17%	17%
	Shenyang, Zhengzhou	10%	9%
	Guangzhou, Shenzhen	18%	19%
	Changsha, Wuhan	8%	7%
	Chengdu, Guiyang	12%	12%
	Chongqing	15%	11%
	Total	**100%**	**100%**
Personal monthly income before tax	Less than 9,000 RMB	32%	27%
	9,000-11,999 RMB	33%	34%
	12,000+ RMB	35%	39%
	Total	**100%**	**100%**

METHODOLOGY: COLOMBIA

Vinitrac® Colombia

- The data for this survey was collected in Colombia in January 2020

- Data was gathered via Wine Intelligence's Vinitrac® online survey

- Respondents were screened to ensure that they drink wine at least twice a year; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade

- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

- The data is representative of Colombian semi-annual wine drinkers in terms of gender, age and region

- The distribution of the sample is shown in the table

		Jan-20
	n=	*700*
Gender	Male	54%
	Female	46%
	Total	*100%*
Age	18-24	20%
	25-34	24%
	35-44	21%
	45-54	17%
	55 and over	18%
	Total	*100%*
Region	Bogotá	68%
	Barranquilla	8%
	Cartagena	7%
	Medellín	17%
	Total	*100%*

METHODOLOGY: FINLAND

Vinitrac® Finland

- The data for this survey was collected in Finland in January 2020

- Data was gathered via Wine Intelligence's Vinitrac® online survey

- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade

- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

- The data is representative of Finnish regular wine drinkers in terms of gender and age

- The distribution of the sample is shown in the table

		Jan-20
	n=	1,000
Gender	Male	48%
	Female	52%
	Total	**100%**
Age	18-24	7%
	25-34	14%
	35-44	14%
	45-54	16%
	55 and over	49%
	Total	**100%**

METHODOLOGY: FRANCE

Vinitrac® France

- The data for this study was collected in France in January 2019 and October 2019

- Data was gathered via Wine Intelligence's Vinitrac® online survey

- Respondents were screened to ensure that they reside in French territory (excluding DOM)

- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade

- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

- The data is representative of French regular wine drinkers in terms of gender, age, region and income

- The distribution of the sample is shown in the table

		Jan-19	Oct-19
	n=	1,103	1,010
Gender	Male	51%	51%
	Female	49%	49%
	Total	**100%**	**100%**
Age	18-24	9%	9%
	25-34	16%	16%
	35-44	16%	16%
	45-54	16%	16%
	55-64	17%	16%
	65 and over	26%	26%
	Total	**100%**	**100%**
Region	Centre Est	17%	14%
	Centre Ouest	6%	8%
	Est	6%	9%
	Nord	9%	9%
	Ouest Nord	15%	11%
	Ouest Sud	6%	9%
	Paris	17%	17%
	Sud-Est	12%	12%
	Sud-Ouest	12%	11%
	Total	**100%**	**100%**
Income	Less than 1200€	9%	9%
	1200€ - 2000€	21%	20%
	2000€ - 3000€	27%	26%
	3000€ and above	41%	40%
	Prefer not to answer	2%	5%
	Total	**100%**	**100%**

METHODOLOGY: GERMANY

Vinitrac® Germany

- The data for this survey was collected in Germany in October 2018 and October 2019

- Data was gathered via Wine Intelligence's Vinitrac® online survey

- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade

- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

- The data is representative of German regular wine drinkers in terms of age, gender and region

- The distribution of the sample is shown in the table

			Oct-18	Oct-19
		n=	1,000	1,010
Gender	Male		43%	43%
	Female		57%	58%
	Total		**100%**	**100%**
Age	18-24		4%	4%
	25-34		12%	12%
	35-44		16%	16%
	45-54		22%	22%
	55 and over		46%	46%
	Total		**100%**	**100%**
Region	Baden-Württemberg		15%	15%
	Bayern		17%	17%
	Berlin		4%	4%
	Hessen		7%	7%
	Mecklenburg-Vorpommern, Brandenburg		5%	5%
	Niedersachsen, Bremen		10%	10%
	Nordrhein-Westfalen		19%	19%
	Rheinland-Pfalz, Saarland		6%	6%
	Sachsen, Sachsen-Anhalt, Thüringen		11%	11%
	Schleswig-Holstein, Hamburg		6%	6%
	Total		**100%**	**100%**

METHODOLOGY: HONG KONG

Vinitrac® Hong Kong

- The data for this report was collected in Hong Kong in October 2019

- Data was gathered via Wine Intelligence's Vinitrac® online survey

- Respondents were screened to ensure that they drink wine at least twice a year; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade

- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

- The data is representative of Hong Kong semi-annual wine drinkers in terms of gender, age and monthly household income

- The distribution of the sample is shown in the table

		Oct-19
	n=	770
Gender	Male	47%
	Female	53%
	Total	*100%*
Age	18-24	8%
	25-34	25%
	35-44	24%
	45-54	24%
	55-60	19%
	Total	*100%*
Monthly household income	HK$15,000 - 19,999	10%
	HK$20,000 - 24,999	11%
	HK$25,000 - 29,999	9%
	HK$30,000 - 39,999	17%
	HK$40,000 - 59,999	23%
	HK$60,000 or above	29%
	Prefer not to answer	1%
	Total	*100%*

METHODOLOGY: IRELAND

Vinitrac® Ireland

- The data for this survey was collected in Ireland in July 2018 and October 2019

- Data was gathered via Wine Intelligence's Vinitrac® online survey

- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade

- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

- The data is representative of Irish regular wine drinkers in terms of gender and age

- The distribution of the sample is shown in the table

		Jul-18	*Oct-19*
	n=	*1,000*	*1,000*
Gender	Male	50%	48%
	Female	50%	52%
	Total	*100%*	*100%*
Age	18-24	5%	8%
	25-34	19%	18%
	35-44	21%	19%
	45-54	18%	16%
	55-64	16%	14%
	65 and over	21%	24%
	Total	*100%*	*100%*

METHODOLOGY: JAPAN

Vinitrac® Japan

- The data for this report was collected in Japan in January 2019 and October 2019

- Data was gathered via Wine Intelligence's Vinitrac® online survey

- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade

- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

- The data is representative of Japanese regular wine drinkers in terms of gender and age

- The distribution of the sample is shown in the table

		Jan-19	Oct-19
	n=	1,008	1,000
Gender	Male	47%	51%
	Female	53%	49%
	Total	*100%*	*100%*
Age	20-24	8%	2%
	25-34	14%	15%
	35-44	13%	11%
	45-54	16%	13%
	55 and over	49%	59%
	Total	*100%*	*100%*

METHODOLOGY: MEXICO

Vinitrac® Mexico

- The data for this survey was collected in Mexico in October 2019

- Data was gathered via Wine Intelligence's Vinitrac® online survey

- Respondents were screened to ensure that they drink imported wine at least twice a year; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade

- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

- The data is representative of Mexican semi-annual imported wine drinkers in terms of age, gender and city

- The distribution of the sample is shown in the table

		Oct-19
	n=	700
Gender	Male	54%
	Female	46%
	Total	**100%**
Age	18-24	22%
	25-34	25%
	35-44	23%
	45-54	20%
	55-59	10%
	Total	**100%**
City	Mexico DF	66%
	Guadalajara	18%
	Monterrey	16%
	Total	**100%**

METHODOLOGY: NETHERLANDS

Vinitrac® Netherlands

- The data for this survey was collected in the Netherlands in January 2020

- Data was gathered via Wine Intelligence's Vinitrac® online survey

- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade

- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

- The data is representative of Dutch regular wine drinkers in terms of gender and age

- The distribution of the sample is shown in the table

			Jan-20
		n=	1,000
Gender	Male		48%
	Female		52%
	Total		100%
Age	18-24		11%
	25-34		14%
	35-44		18%
	45-54		18%
	55 and over		39%
	Total		100%

METHODOLOGY: POLAND

Vinitrac® Poland

- The data for this report was collected in Poland in January 2020

- Data was gathered via Wine Intelligence's Vinitrac® online survey

- Respondents were screened to ensure that they drink wine at least twice a year; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade

- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

- The data is representative of Polish semi-annual wine drinkers in terms of gender and age

- The distribution of the sample is shown in the table

		Jan-20
	n=	1,000
Gender	Male	46%
	Female	54%
	Total	**100%**
Age	18-24	8%
	25-34	21%
	35-44	20%
	45-54	16%
	55-64	16%
	65 and over	18%
	Total	**100%**

METHODOLOGY: PORTGUAL

Vinitrac® Portugal

- The data for this survey was collected in Portugal in October 2018 and October 2019

- Data was gathered via Wine Intelligence's Vinitrac® online survey

- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade

- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

- The data is representative of Portuguese regular wine drinkers in terms of gender and age

- The distribution of the sample is shown in the table

		Oct-18	*Oct-19*
	n=	*1,000*	*1,405*
Gender	Male	50%	56%
	Female	50%	44%
	Total	*100%*	*100%*
Age	18-34	13%	15%
	35-44	18%	19%
	45-54	20%	20%
	55-64	20%	19%
	65 and over	29%	27%
	Total	*100%*	*100%*

METHODOLOGY: SOUTH KOREA

Vinitrac® South Korea

- The data for this survey was collected in South Korea in July 2018 and October 2019

- Data was gathered via Wine Intelligence's Vinitrac® online survey:

- Respondents were screened to ensure that they drink imported wine at least twice a year; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade

- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

- The data is representative of South Korean imported grape-based wine drinkers in terms of age and gender

- *Note: Due to methodology changes, sampling of those aged 59-64 began in 2019

- The distribution of the sample is shown in the table

		Jul-18	Oct-19
	n=	1,000	1,592
Gender	Male	51%	46%
	Female	49%	54%
	Total	100%	100%
Age*	19-24	7%	11%
	25-34	20%	18%
	35-44	26%	24%
	45-54	37%	30%
	55 and over	10%	18%
	Total	100%	100%

METHODOLOGY: SPAIN

Vinitrac® Spain

- The data for this survey was collected in Spain in October 2018 and July 2019

- Data was gathered via Wine Intelligence's Vinitrac® online survey

- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade

- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

- The data is representative of Spanish regular wine drinkers in terms of gender, age and region

- The distribution of the sample is shown in the table

		n=	Oct-18 1,000	Jul-19 1,073
Gender	Male		50%	50%
	Female		50%	50%
	Total		**100%**	**100%**
Age	18-24		7%	7%
	25-34		16%	16%
	35-44		18%	18%
	45-54		20%	20%
	55-64		14%	14%
	65 and over		26%	26%
	Total		**100%**	**100%**
Region	Noroeste		21%	22%
	Noreste		27%	27%
	Centro		26%	24%
	Sur		26%	27%
	Total		**100%**	**100%**

METHODOLOGY: SWEDEN

Vinitrac® Sweden

- The data for this survey was collected in Sweden in July 2018 and October 2019

- Data was gathered via Wine Intelligence's Vinitrac® online survey

- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade

- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

- The data is representative of Swedish regular wine drinkers in terms of gender and age

- The distribution of the sample is shown in the table

		Jul-18	Oct-19
	n=	1,000	1,003
Gender	Male	51%	48%
	Female	49%	52%
	Total	100%	100%
Age	18-24	9%	5%
	25-34	15%	13%
	35-44	15%	13%
	45-54	17%	18%
	55 and over	44%	51%
	Total	100%	100%

METHODOLOGY: UK

Vinitrac® UK

- The data for this report was collected in the UK in October 2018 and October 2019

- Data was gathered via Wine Intelligence's Vinitrac® online survey

- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade

- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

- The data is representative of UK regular wine drinkers in terms of gender, age, annual pre-tax household income and region

- The distribution of the sample is shown in the table

		Oct-18	Oct-19
	n=	1,000	1,010
Gender	Male	49%	48%
	Female	51%	52%
	Total	**100%**	**100%**
Age	18-24	9%	9%
	25-34	16%	16%
	35-44	16%	16%
	45-54	17%	16%
	55-64	15%	15%
	65 and over	27%	27%
	Total	**100%**	**100%**
Annual pre-tax household income	Under £20,000	12%	12%
	£20,000 - £29,999	17%	17%
	£30,000 - £39,999	19%	19%
	£40,000 - £59,999	19%	19%
	£60,000+	23%	23%
	Prefer not to answer	10%	10%
	Total	**100%**	**100%**
Region	North	21%	21%
	Midlands	17%	17%
	East Anglia, South East	23%	23%
	London	13%	13%
	South West	9%	9%
	Wales	5%	5%
	Scotland	9%	9%
	Northern Ireland	3%	3%
	Total	**100%**	**100%**

METHODOLOGY: US

Vinitrac® US

- The data for this report was collected in the US in October 2018 and October 2019

- Data was gathered via Wine Intelligence's Vinitrac® online survey

- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé / blush wine; and buy wine in the off-premise 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 data is representative of US regular wine drinkers in terms of gender, age, and region

- The distribution of the sample is shown in the table

			Oct-18	Oct-19
		n=	2,000	2,004
Gender	Male		50%	51%
	Female		50%	49%
	Total		**100%**	**100%**
Age	21-24		8%	8%
	25-34		22%	21%
	35-44		14%	20%
	45-54		18%	14%
	55-64		18%	15%
	65 and over		21%	22%
	Total		**100%**	**100%**
Region	New England		6%	5%
	Middle Atlantic		14%	15%
	East North Central		13%	11%
	West North Central		4%	7%
	South Atlantic		20%	21%
	East South Central		5%	4%
	West South Central		11%	11%
	Mountain		6%	7%
	Pacific		21%	19%
	Total		**100%**	**100%**

RESEARCH METHODOLOGY

Vinitrac®

How does Vinitrac® work?

1) Defining the right samples:

- Wine Intelligence, with the support of global research companies (eg 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 (ie 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 (eg 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 (eg those who sped through the survey or gave inconsistent answers to selected questions) and weight the data in order to ensure representability

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

Definitions and Interpretation

The "Agreement" means the Agreement between Wine Intelligence Ltd and the Customer to provide a Licence for the use of the Syndicated Research Report(s) for Fees on these terms and conditions of business and as set out in a Proposal and the Acceptance of Proposal

"WI" is Wine Intelligence Ltd, trading as Wine Intelligence.

"Customer" means the person or entity purchasing the Licence for the use of the Syndicated Research Report(s)

"Proprietary Information" means all information contained in the Syndicated Research Report(s) and associated briefings or presentations by WI, plus all logos, Processes, third party data and formats contained therein

"Licence" means the Customer's right to use, store, retrieve and disseminate the Syndicated Research Report(s), as defined by the Agreement

"Acceptance of Proposal" means the document provided by the Customer to WI confirming the terms of engagement of WI to provide the Customer with the Licence for the use of the Syndicated Research Report(s)

"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

"Processes" means any research processes, techniques and methodologies used in the creation of the Syndicated Research Report(s)

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

"Syndicated Research Report" means a written document containing Wine Intelligence copyright materials such as data, information, insight, commentary, either written, oral, video, or audio and, where appropriate, copyright materials of a Third Party that have been reproduced by permission

"Representative Organisation" means any body, association, trading group, generic organisation or any other coalition of interested parties, howsoever constituted, that acts on behalf of a broader group of stakeholders

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

1. Engagement

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.

The Fees for the Syndicated Research Reports shall be priced in Pounds Sterling. WI will publish indicative prices in Euros, [XX] Dollars, Australian Dollars, Canadian Dollars from time to time, and the Customer will have the opportunity to pay for Syndicated Research Reports using these currencies. Should the Customer opt for this form of payment the exact amount payable will be based on the prevailing exchange rate at the time of the execution of the Agreement.

2.. Copyright

2.1 The Copyright in the Syndicated Research Report(s) shall at all times vest with WI. The copyright in all artwork, data and copy for each element of the report created and assembled by WI shall at all times remain the property of WI.

2.2 All copyright and any other intellectual property rights in any material produced supplied or made available by a third party to WI for inclusion in the Syndicated Research Report shall remain the property of the third party. The Customer warrants its title to WI, except as may be expressly disclosed in writing, and agrees to indemnify WI against any claims by third parties in respect of any infringement of their copyright or other intellectual property rights.

2.3 WI asserts to the Customer its moral right to be identified as the author of the Syndicated Research Report in accordance with the UK Copyright Designs and Patents Act 1988 Section 77 and 78, and shall be entitled to hold itself out as the author of the Syndicated Research Report (and in particular the research undertaken in the process of completing the Syndicated Research Report) as part of WI's own general marketing activities. WI shall be entitled to publish the name of the Customer in association with the Syndicated Research Report(s) as part of this general marketing activities.

2.4 The copyright in the Processes used to execute the Syndicated Research Report shall remain the property of WI throughout.

3. Licence

3.1 WI grants to the Customer under the Agreement a non-exclusive Licence in perpetuity to store and retrieve an electronic version of the Syndicated Research Report(s)

3.2 The Customer is entitled to disseminate the Syndicated Research Report(s) within its immediate organisation, including organisations affiliated by majority shareholdings, legally liable partnerships, or other majority ownership structure

3.3 If the Customer is a Representative Organisation, the entitlement outlined in Clause 7.2 DOES NOT extend to parties who hold membership or similar interest in the Representative Organisation, except by specific written permission from WI and the payment of further Fees associated with a Multi-User Licence

3.4 The Customer is entitled to extract elements of the Syndicated Research Report and re-use them for internal and external presentations, subject to the doctrine of Fair Use

3.5 At all times the Customer must identify any information extracted from the Syndicated Research Report in 7.5 above as being from WI

4. Warranties

No advice or information whether oral or written provided by WI to the Customer through the Syndicated Research Report(s) shall create any warranty not expressly stated in this Agreement.

The Client warrants and undertakes to abide by the UK Copyright Designs and Patents Act 1988 Section 77 & 78, and undertakes to obey the copyright restrictions on any materials received as part of this Agreement.

Please contact Wine Intelligence for full terms and conditions

Connecting wine businesses with knowledge and insights globally

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