



WINE INTELLIGENCE

# BRAZIL WINE LANDSCAPES 2020

APRIL 2020



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# CONTENTS



**04** **Introduction**  
Management summary

**17** **Overview of the Brazilian wine market**  
Market Classification  
Imported vs. domestic still wine  
Imported sparkling wine  
Per capita consumption of still light wine

**23** **Overview of Brazilian wine consumers**  
Demographics  
Wine consumption frequency  
Wine attitudes and involvement  
Views on wine closures  
Confidence and knowledge index

**34** **Repertoire**  
Alcoholic beverage repertoire  
Varietal consumption  
Origin awareness and purchase

**46** **Wine-buying behaviors**  
Wine-buying channel usage  
Wine-buying retailer usage  
Wine-buying choice cues

**53** **Wine consumption behaviors**  
Off-trade: wine consumption frequency by occasion  
Off-trade: spend on wine by occasion  
Wine purchase in the on-trade  
On-trade: wine consumption frequency by occasion  
On-trade: spend on wine by occasion

**59** **Brand health**  
Brand power  
Brand awareness, purchase, purchase conversion, consideration, affinity, and recommendation

**74** **COVID-19 Update, April 2020**  
Wine consumption frequency  
Off-trade wine consumption frequency by occasion  
Off-trade spend on wine by occasion change  
On-trade wine consumption frequency by occasion

**86** **Lifestyle behavior changes**  
Lifestyle behavior pre covid-19 impact  
Change in lifestyle behavior anticipated after virus  
Future priorities – After the pandemic

**98** **Research methodology**  
Quantitative  
Qualitative

# INTRODUCTION

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This Brazil Landscapes report is a tale of two eras. For the first era, tracking Brazilian regular wine drinker behaviors and attitudes towards wine over the past two years to January 2020 forms the majority of the report. The second era, starting in March 2020 as COVID-19 started to spread in Brazil, and government restrictions came into place, is detailed on pages 74 to 96.

Wine Intelligence is fortunate in that we had survey data to call upon that captured both these states of the Brazilian wine market. The January 2020 study, covering all regular wine drinkers in Brazil (imported and / or domestic), shows the long-term changes in this large, important and high potential market.

The March 2020 data, collected between March 18<sup>th</sup> and 24<sup>th</sup>, just as restrictions

were coming into place, covers imported wine drinkers in selected major cities only, though there is a lot of cross-over between both populations.

The second, more recent survey, starts to delve into intentions and priorities for Brazilians once current government restrictions have been relaxed, and also asks them to assess their priorities further ahead, to offer some clues as to how wine will fare once the pandemic crisis is over.

While it is not yet clear how significant an impact will be felt in Brazil regarding the pandemic, the data in this report suggests that it will affect consumer behavior for some months to come, though perhaps not permanently.

# RESEARCH METHODOLOGY: RWD QUANTITATIVE



The data for this report was collected in Brazil in January + 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 Brazilian regular wine drinkers in terms of gender, age and region

The distribution of the sample is shown in the table

		<i>Jan + Jul-18</i>	<i>Jan-20</i>
		<i>n= 1,880</i>	<i>993</i>
<b>Gender</b>	Male	53%	53%
	Female	47%	47%
	<b>Total</b>	<b>100%</b>	<b>100%</b>
<b>Age</b>	18-24	16%	12%
	25-34	30%	29%
	35-44	24%	26%
	45-54	19%	19%
	55-64	11%	14%
<b>Total</b>	<b>100%</b>	<b>100%</b>	
<b>Region</b>	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	15%	15%
	Midwest	6%	8%
<b>Total</b>	<b>100%</b>	<b>100%</b>	

Wine Intelligence, Vinitrac® Brazil, January + July 2018 (n = 1,880) and January 2020 (n = 993), Brazilian regular wine drinkers

# RESEARCH METHODOLOGY: IWD QUANTITATIVE



The data for this report was collected in Brazil in March 2020

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 Brazilian imported wine drinkers in terms of gender, age and region

The distribution of the sample is shown in the table

		<i>Mar-20</i> <i>n= 1,000</i>
<b>Gender</b>	Male	54%
	Female	46%
	<b>Total</b>	<b>100%</b>
<b>Age</b>	18-24	19%
	25-34	32%
	35-44	23%
	45-54	18%
	55-59	8%
	<b>Total</b>	<b>100%</b>
<b>Region</b>	Belo Horizonte	7%
	Brasilia	4%
	Curitiba	7%
	Rio de Janeiro	19%
	Interior de São Paulo	7%
	São Paulo	43%
	Salvador	8%
	Porto Alegre	4%
	<b>Total</b>	<b>100%</b>

Wine Intelligence, Vinitrac® Brazil, March 2020 (n = 1,000),  
Brazilian imported wine drinkers

# RESEARCH METHODOLOGY: QUALITATIVE



## TRADE INTERVIEWEES

Trade Interviews were conducted with five experienced industry professionals in the Brazilian wine trade in 2020

Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing

The five interviewees were members of the wine trade working in different roles:

*1 x Wine Retailer*

*1 x Wine Journalist*

*1 x Wine Educator*

*1 x Wine Sommelier*

*1 x Wine Importer*

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