



# **SYNDICATED BRAND HEALTH TRACKING STUDY**

**AUSTRALIA, BRAZIL, CANADA, CHINA,  
FRANCE, GERMANY, JAPAN,  
SWEDEN, UK, US**

**Surveys in field July 2020**

# INTRODUCTION



**The world is changing, and so are people's attitudes and behaviours towards wine.**

It is even more important than ever to understand how consumers interact with wine brands. Have their views changed since the impact of Covid-19 and what will their future behaviour look like? Have they changed their perceptions of individual brands and which brands they will consider purchasing in the future?

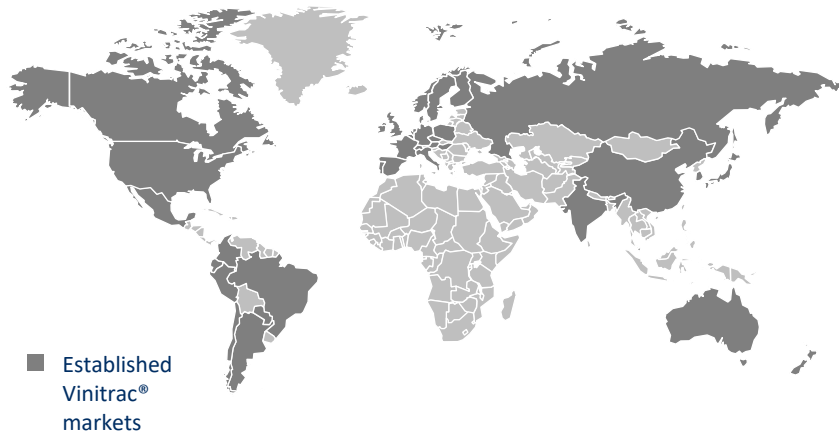
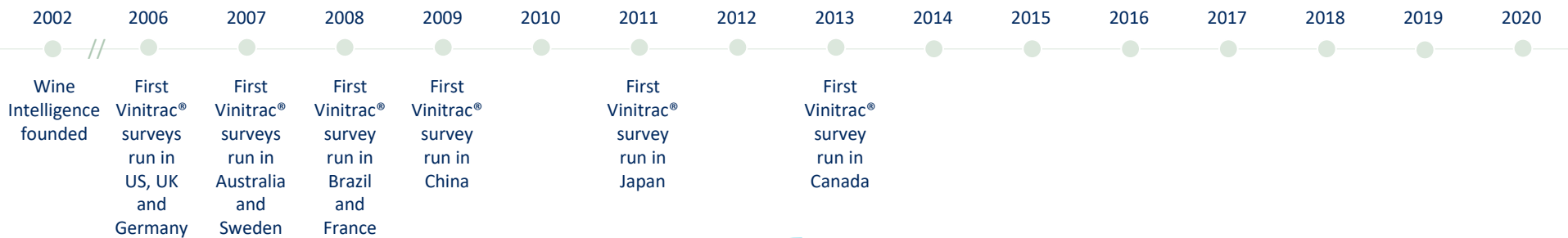
Due to popular demand, we are launching **new syndicated studies to help you understand wine consumers' attitudes and behaviours towards wine brands in Australia, Brazil, Canada, China, France, Germany, Japan, Sweden, the UK and the US.**

These studies will analyse the key brands in these wine consumption markets using data collected in July 2020 and tracking against data from March 2020 (pre-virus behaviour) and previous waves, **giving you a clear view of how your brands and competitors' brands are performing.** The standard measures of **awareness, purchase, purchase consideration, affinity, brand imagery and likelihood to buy** will be analysed in addition to calculations of **net promoter score, key driver analysis and conversion to purchase.**

These syndicated brand health studies allow you to see how brands in these markets are performing, while keeping the cost lower than a custom study. Discounts are also available for purchasing 3 or more markets.

# WINE INTELLIGENCE RESEARCH EXPERIENCE

Since 2006, Wine Intelligence has been collecting data in 35 key wine consumption markets through Vinitrac®, our wholly-owned global survey of wine drinkers that monitors and tracks the attitudes, behaviours and consumer relationship with still and sparkling wine around the world



- Multiple waves of data allow us to track changes
- Each survey wave is representative of at least 1,000 regular wine drinkers
- More than 50 brands are currently tested in each market, with the brand list analysed and updated regularly to include key brands
- For more information on our research process, please click here: <https://drive.google.com/file/d/1EWv30-9881h1kvHH421bB3jSDRY6Jiqk/view>

# DATA COLLECTION TRACKING WAVES



MARKET	WAVE 1	WAVE 2	WAVE 3	NEW DATA
<b>Australia</b>	July 2018	July 2019	March 2020 (pre-virus)	July 2020
<b>Brazil</b>	January 2019	January 2020	March 2020 (pre-virus)	July 2020
<b>Canada</b>	October 2018	October 2019	March 2020 (pre-virus)	July 2020
<b>China</b>	March 2018	March 2019	March 2020 (pre-virus)	July 2020
<b>France</b>	May 2017	May 2019	February 2020 (pre-virus)	July 2020
<b>Germany</b>	March 2018	January 2019	March 2020 (pre-virus)	July 2020
<b>Japan</b>	March 2018	March 2019	March 2020 (pre-virus)	July 2020
<b>Sweden</b>	March 2018	March 2019	March 2020 (pre-virus)	July 2020
<b>UK</b>	March + July 2018	March + July 2019	March 2020 (pre-virus)	July 2020
<b>US</b>	October 2018	October 2019	March 2020 (pre-virus)	July 2020

# HOW THE STUDY WORKS



1

We'll ask **brand health questions** in our **July 2020 wave of Vinitrac®**, giving us an update on how brands are performing in the market



2

We'll **compare this data to March 2020 (pre-virus behaviour) and past waves of Vinitrac®** to track how brand usage and perception has changed (see page 4 for details)



**Resulting in a detailed analysis of how brands are performing in the market and how consumer attitudes are changing**, all for the cost of a syndicated study

**Deliverables are a PDF 'Key Takeaways' report and a full Excel data table with cross-tabs by gender, age, Wine Intelligence Portraits segments (if available) & premium buyers. Profiling is also available at an additional cost.**

# BRAND HEALTH MEASURES



Key measures:	2018 wave	2019 wave	March 2020 (Pre-Covid behaviour)	July 2020
<b>1 Awareness [unprompted]</b> % of those who name each brand as top of mind				<b>NEW</b>
<b>2 Awareness [prompted]</b> % who have heard of the following brands (prompted with brand names / logos)	✓	✓	✓	✓
<b>3 Consideration</b> % who would consider buying the following brands	N/A	✓	✓	✓
<b>4 Purchase</b> % who have bought the following brands in past three months	✓	✓	✓	✓
<b>5 Conversion to purchase</b> % who have bought the following brands in past three months among awares	✓	✓	✓	✓
<b>6 Affinity</b> % who think the following brands are right for people like them	✓	✓	✓	✓
<b>7 Recommendation</b> % who would recommend the following brands to a friend	✓	✓	✓	✓
<b>8 Recommendation [to calculate Net Promoter Score]</b> Scale 0-10 how likely would you be to recommend the following brands to a friend				<b>NEW</b>
<b>9 Imagery</b> % of who indicated the following statements as most appropriate to describe each brand				<b>NEW</b>
<b>10 Future intent to purchase</b> % of who indicated they would buy the following brands in the future				<b>NEW</b>

✓ = Data available (may differ per brand – see page 7 for details); N/A = no data available

# BRAND IMAGERY STATEMENTS TESTED

The following standard brand imagery statements will be asked:

Contemporary  
Sophisticated  
Innovative  
Out-dated  
Good value for money  
Tastes good  
High quality  
A safe choice  
Has attractive packaging  
Has a strong tradition and heritage  
A brand I trust  
Sustainably produced  
Distinctive  
A brand I am proud to serve  
Authentic  
Fun  
None of the above

Brand imagery is available for 10 brands in each market, refer to accompanying Excel sheet for details of which brands

# BRANDS COVERED (Brand logo images shown)

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**Refer to the  
attached Excel  
to view the list  
of brands tested  
in each market**

50+  
brands  
per market

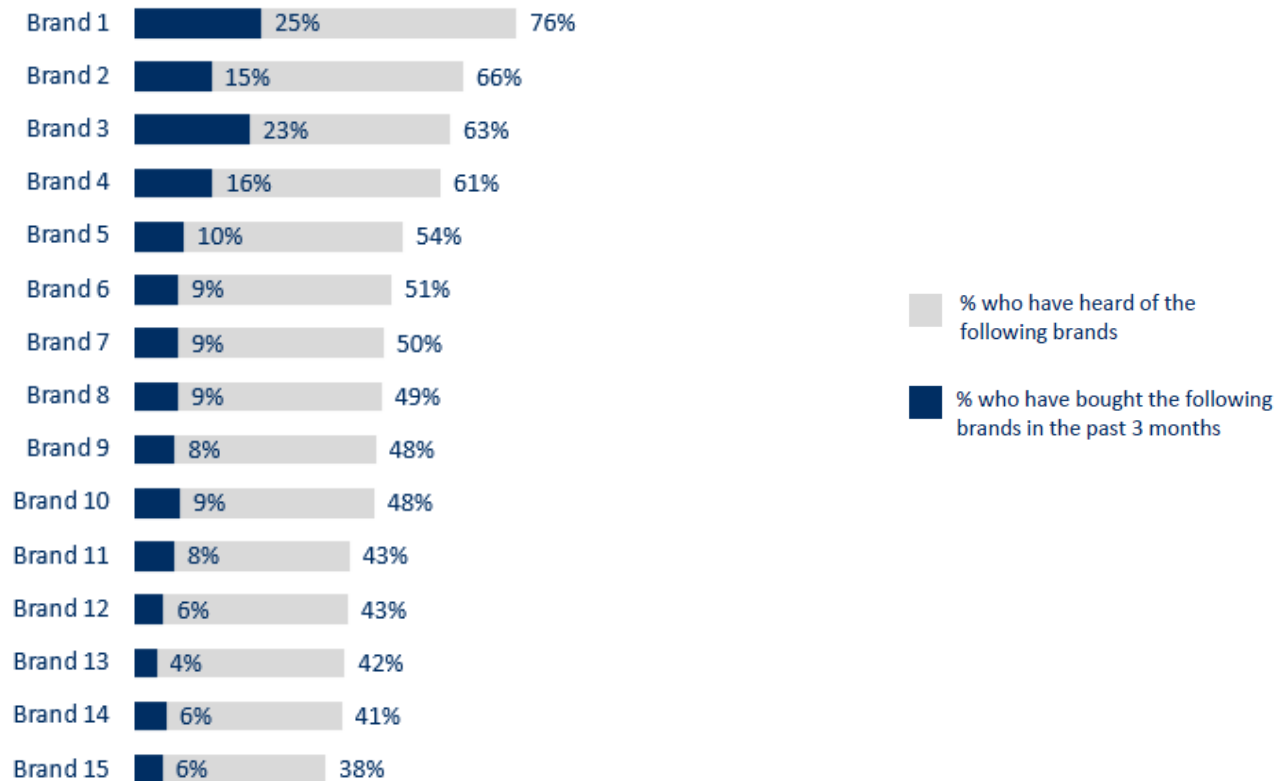


# EXAMPLE OF DATA OUTPUT – AWARENESS AND PURCHASE



## Top 15 brands by awareness and respective purchase level

Base = All regular wine drinkers (n=1,000)



Source: Wine Intelligence Vinitrac®, anonymised sample data

# EXAMPLE OF DATA OUTPUT – AFFINITY



## Affinity: Tracking (2016-2019)

% who think the following brands are right for people like them

Base = Those who have heard of each brand

Rank 2019	Brand	n=	2016	2018	2019	Tracking		Rank 2019	Brand	n=	2016	2018	2019	Tracking	
						vs. '16	vs. '18							vs. '16	vs. '18
1	Brand 1		55%	55%	57%	→	→	26	Brand 26		36%	34%	37%	→	→
2	Brand 2		53%	53%	51%	→	→	27	Brand 27		35%	39%	36%	→	→
3	Brand 3		47%	48%	47%	→	→	28	Brand 28		35%	38%	35%	→	→
4	Brand 4		45%	47%	47%	→	→	29	Brand 29		37%	33%	34%	→	→
5	Brand 5		44%	48%	46%	→	→	30	Brand 30		33%	35%	34%	→	→
6	Brand 6		49%	49%	46%	→	→	31	Brand 31		42%	42%	34%	↓	↓
7	Brand 7		34%	44%	45%	↑	→	32	Brand 32		30%	33%	32%	→	→
8	Brand 8		46%	46%	45%	→	→	33	Brand 33		31%	33%	32%	→	→
9	Brand 9		41%	43%	44%	→	→	34	Brand 34		30%	30%	32%	→	→
10	Brand 10		43%	43%	43%	→	→	35	Brand 35		32%	33%	32%	→	→
11	Brand 11		42%	43%	42%	→	→	36	Brand 36		31%	30%	32%	→	→
12	Brand 12		40%	42%	42%	→	→	37	Brand 37		29%	32%	32%	→	→
13	Brand 13		42%	37%	42%	→	→	38	Brand 38		28%	31%	30%	→	→
14	Brand 14		40%	37%	42%	→	↑	39	Brand 39		26%	29%	29%	→	→
15	Brand 15		42%	42%	42%	→	→	40	Brand 40		31%	30%	29%	→	→
16	Brand 16		42%	39%	42%	→	→	41	Brand 41		24%	26%	28%	→	→
17	Brand 17		32%	44%	41%	↑	→	42	Brand 42		27%	27%	27%	→	→
18	Brand 18		40%	40%	40%	→	→	43	Brand 43		27%	27%	27%	→	→
19	Brand 19		34%	33%	39%	→	→	44	Brand 44		22%	28%	27%	→	→
20	Brand 20		39%	39%	39%	→	→	45	Brand 45		21%	17%	26%	→	↑
21	Brand 21		39%	39%	39%	→	→	46	Brand 46		26%	27%	26%	→	→
22	Brand 22		25%	32%	39%	↑	↑	47	Brand 47		27%	27%	26%	→	→
23	Brand 23		37%	39%	38%	→	→	48	Brand 48		25%	25%	26%	→	→
24	Brand 24		39%	39%	38%	→	→	49	Brand 49		25%	24%	26%	→	→
25	Brand 25		37%	38%	37%	→	→	50	Brand 50		21%	25%	25%	→	→

↑ / ↓: Statistically significantly higher / lower than previous wave at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Australia, anonymised sample data

# EXAMPLE OF DATA OUTPUT – IMAGERY



## Imagery perception

% who indicated the following statements as most appropriate to describe each brand  
 Base = Those who have heard of each brand

Green = Relative strength within each brand  
 Red = Relative weakness within each brand

	Brand 1	Brand 2	Brand 3	Brand 4	Brand 5	Brand 6	Brand 7	Brand 8	Brand 9	Brand 10
<i>n=</i>	764	667	530	476	213	752	604	591	385	192
Contemporary	40%	36%	33%	25%	19%	35%	31%	35%	18%	15%
Sophisticated	30%	28%	26%	22%	14%	33%	28%	28%	16%	18%
Innovative	20%	19%	21%	23%	26%	19%	27%	24%	18%	16%
Out-dated	18%	18%	20%	25%	24%	17%	24%	22%	17%	17%
Good value for money	20%	21%	17%	19%	17%	19%	20%	20%	26%	22%
Tastes good	19%	19%	15%	16%	25%	18%	18%	22%	12%	18%
High quality	16%	18%	16%	19%	17%	16%	18%	21%	18%	15%
Has attractive packaging	14%	14%	15%	18%	20%	14%	19%	16%	17%	12%
Has strong tradition and heritage	13%	15%	11%	16%	21%	13%	14%	16%	11%	15%
A brand I trust	23%	16%	12%	13%	12%	16%	15%	16%	15%	7%
Sustainably produced	12%	15%	15%	18%	14%	10%	11%	11%	11%	16%
Distinctive	9%	10%	11%	12%	14%	9%	10%	11%	14%	8%

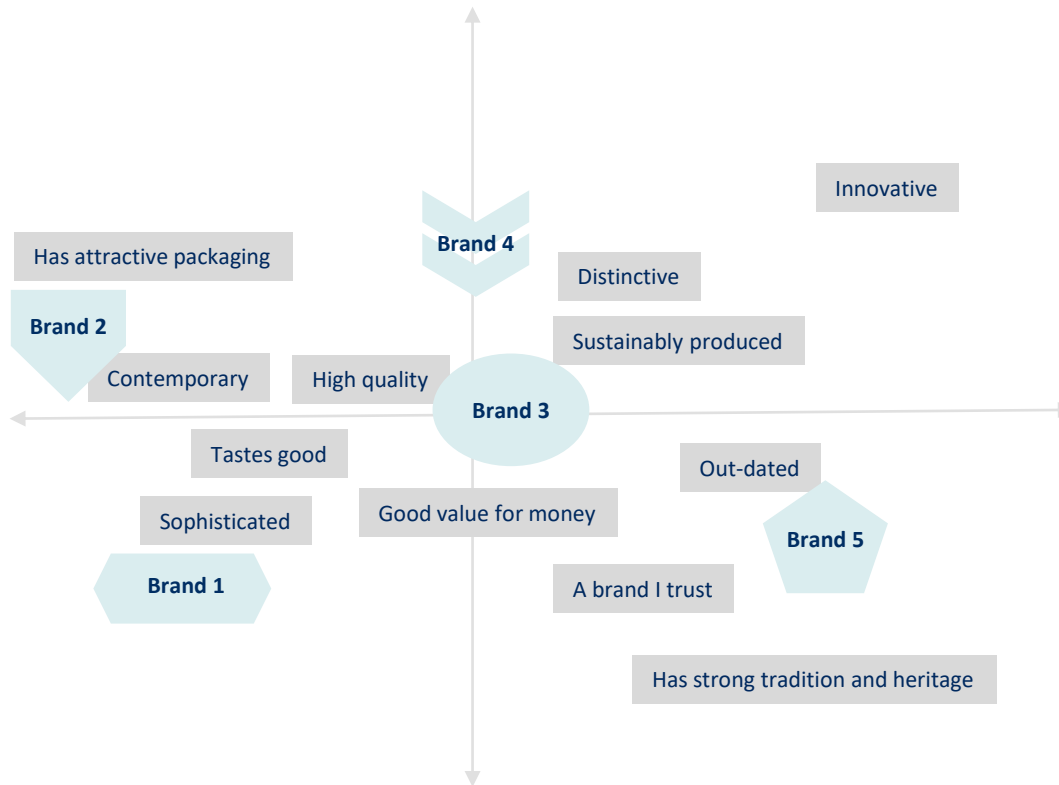
Source: Wine Intelligence, Vinitrac®, anonymised sample data

# EXAMPLE OF DATA OUTPUT – IMAGERY

## Imagery perception: Selected brands

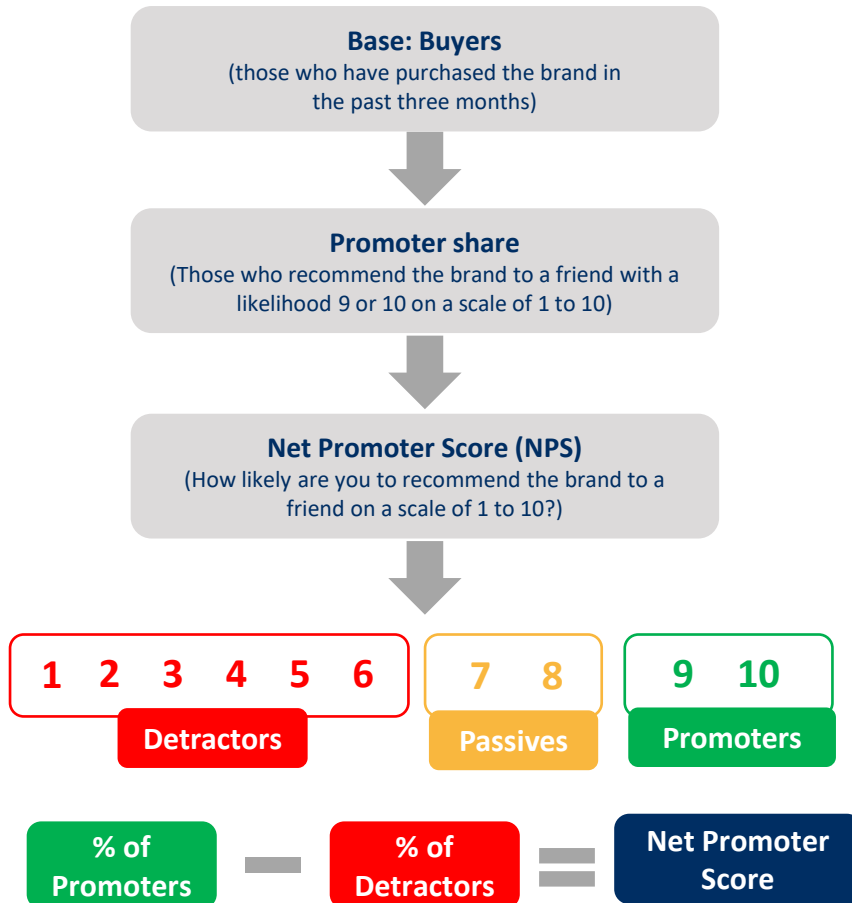
The positioning map is a spatial representation of associations between brands and statements. The strength of the association is measured by how far the brand and the statement are from the centre of the plot, and how close they are to one another

Base = Those who have heard of each brand



# EXAMPLE OF DATA OUTPUT – NET PROMOTER SCORE

## How it's calculated:



## Output:

### Net promoter score

% who would recommend the brand with a likelihood of 9 or 10 subtracted by the % who would recommend the brand with a likelihood of 1 to 6

Base = Those who selected one of the brands as a brand they would recommend

Rank		Net Promoter Score
1	Brand 1	56.6
2	Brand 2	49.5
3	Brand 3	48.5
4	Brand 4	45.6
5	Brand 5	41.4
6	Brand 6	20.8
7	Brand 7	18.4
8	Brand 8	18.4
9	Brand 9	15.5
10	Brand 10	14.7
11	Brand 11	12.5
12	Brand 12	8.9
13	Brand 13	5.9
14	Brand 14	3.5
15	Brand 15	-5.1
16	Brand 16	-6.4
17	Brand 17	-18.0
18	Brand 18	-21.3

Source: Wine Intelligence, Vinitrac®, anonymised sample data

# SYNDICATED BRAND HEALTH STUDY PRICING & TIMELINE



**GBP 7,440**  
**USD 9,420**  
**AUD 13,800**  
**EUR 8,640**

Australia, Brazil, Canada, China, France, Germany, Japan, Sweden, UK and US\*  
 Other markets may be available – please contact us

TIMELINE	DATE
SURVEY IN FIELD	From 20 <sup>th</sup> July
STUDY AVAILABLE	From 28 <sup>th</sup> August

ADD ONS	GBP	USD	AUD	EUR
<b>Add profiling of brand awares / purchasers</b> Cost per brand	700	900	1,300	800

5% discount offered for 3-4 markets; 10% discount offered for 5+ markets

\* Supplement for US market as sample size is 2000 is GBP 700 / USD 900 / AUD 1,300 / EUR 800



*Connecting wine businesses with  
knowledge and insights globally*

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