



WINE INTELLIGENCE

GLOBAL WINE BRAND

POWER INDEX 2021

THE MOST POWERFUL BRANDS IN WINE ACROSS
25 KEY MARKETS

APRIL 2021

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CONTENTS



Introduction

p. 5

Global Wine Brand Power Index 2021: Key takeaways

p. 9

Wine Brand Power 2021 by market: Tracking

p. 16

Australia p. 16

Ireland p. 36

Belgium p. 18

Japan p. 38

Brazil p. 20

Mexico p. 40

Canada p. 22

Netherlands p. 42

China p. 24

Portugal p. 44

Colombia p. 26

South Korea p. 46

Finland p. 28

Spain p. 48

France p. 30

Sweden p. 50

Germany p. 32

UK p. 52

Hong Kong p. 34

US p. 54

New markets for 2021

p. 57

Argentina p. 57

Russia p. 63

Italy p. 59

Singapore p. 65

New Zealand p. 61

Appendix and methodology

p. 68

GLOBAL WINE BRAND POWER 2021 vs. 2020





In 2021, we incorporated consumer feedback from six key brand health measures and calculated a Brand Power Index at both a country and global level across **25 key wine markets**; resulting in the **fourth annual Global Wine Brand Power Index**.

This year, Poland has been removed due to lack of data availability. However, to maintain regional influence and gain a more comprehensive understanding of wine brand power throughout the world, **the 2021 Global Wine Brand Power Index** includes **five additional markets** — **Argentina, Italy, New Zealand, Russia and Singapore**.

Additionally, the 2021 Global Wine Brand Power report also includes **tracking against the markets examined in the 2020 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. We have also added in tracking of each component of the index, **giving a more comprehensive view of the drivers behind score changes**.

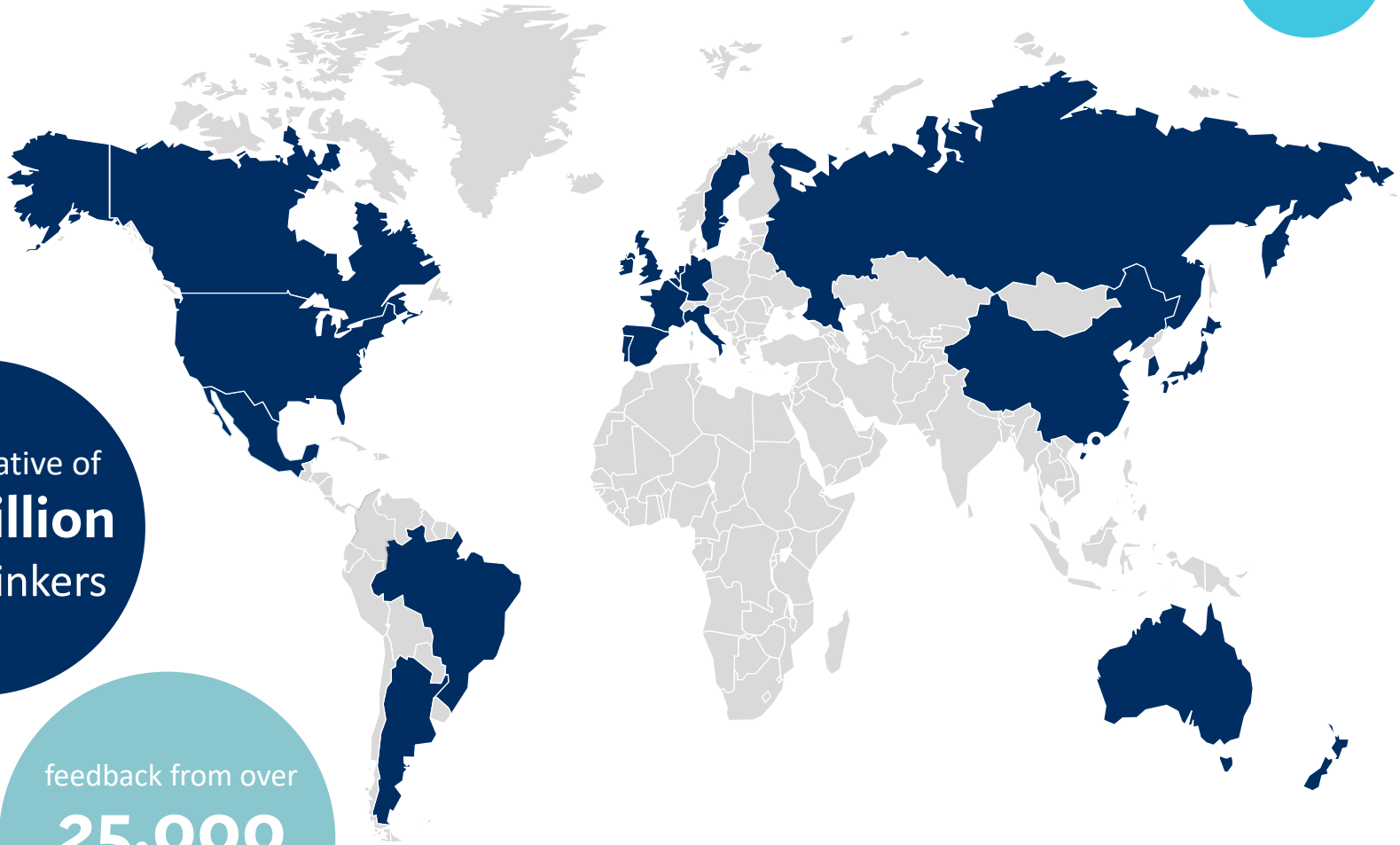
Ranking differences are coded as follows:

-  ————— **increase** in ranking position vs 2020
-  ————— **decrease** in ranking position vs 2020
- =** ————— **no change** in ranking position vs 2020
- NEW** ————— **tracking unavailable** as brand first tested in 2021

Note: Because the five new markets introduced in the 2021 Global Wine Brand Power Index were not included in the 2020 report, tracking for them at an individual country level is not available for this report.

For more information, please see appendix in slides 68-72

GLOBAL WINE BRAND POWER INDEX MARKETS



representative of
435 million
wine drinkers

feedback from over
25,000
wine drinkers

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

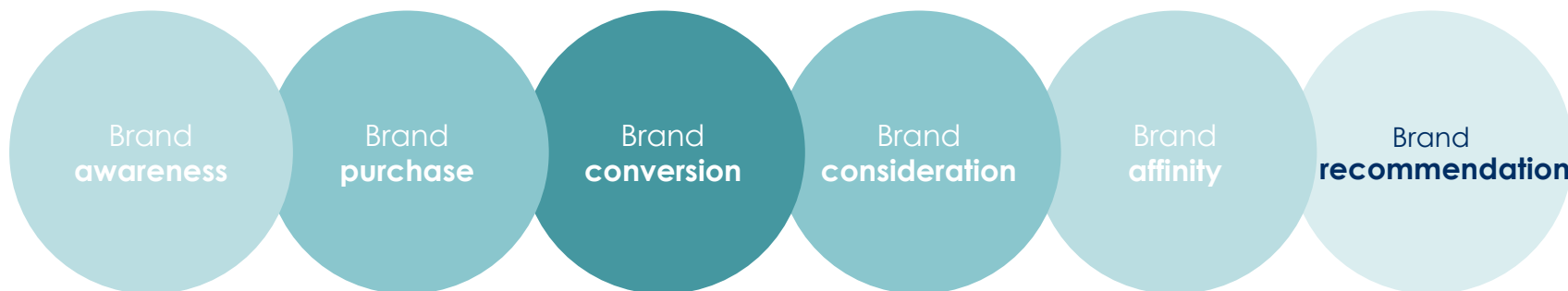
CALCULATING THE WINE BRAND POWER INDEX



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:



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

We selected 25 key wine markets for the Global Wine Brand Power 2021 report (our largest index yet!), which include **the following number of wine drinkers on slide 10**

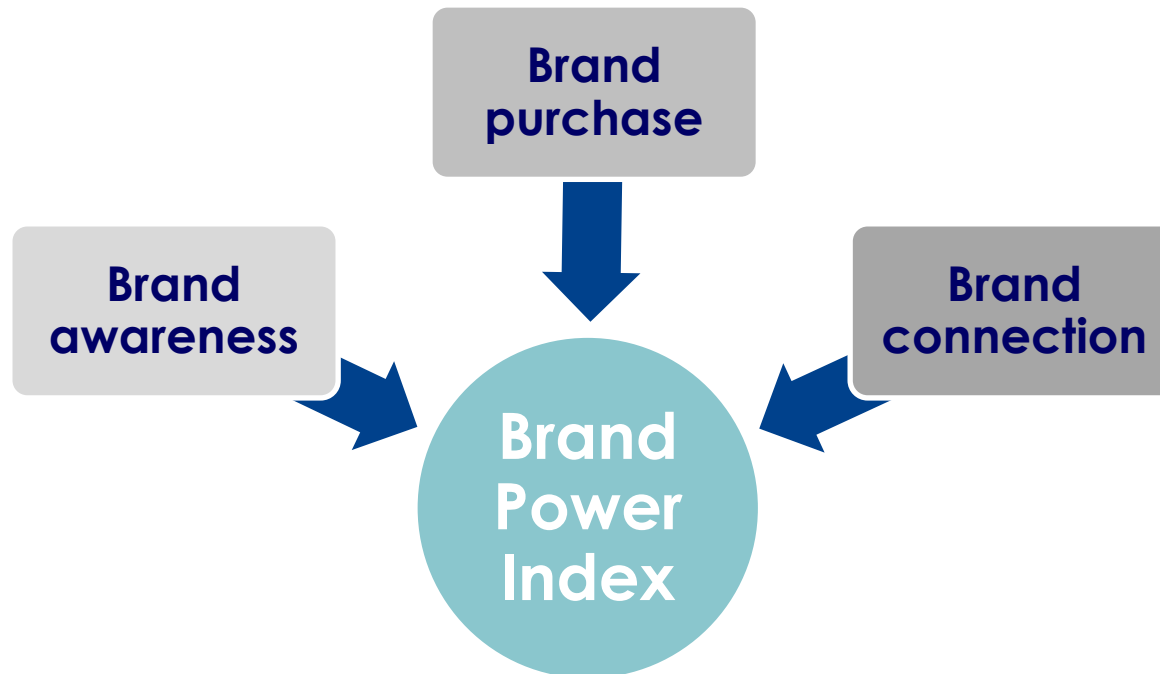
CALCULATING THE WINE BRAND POWER INDEX



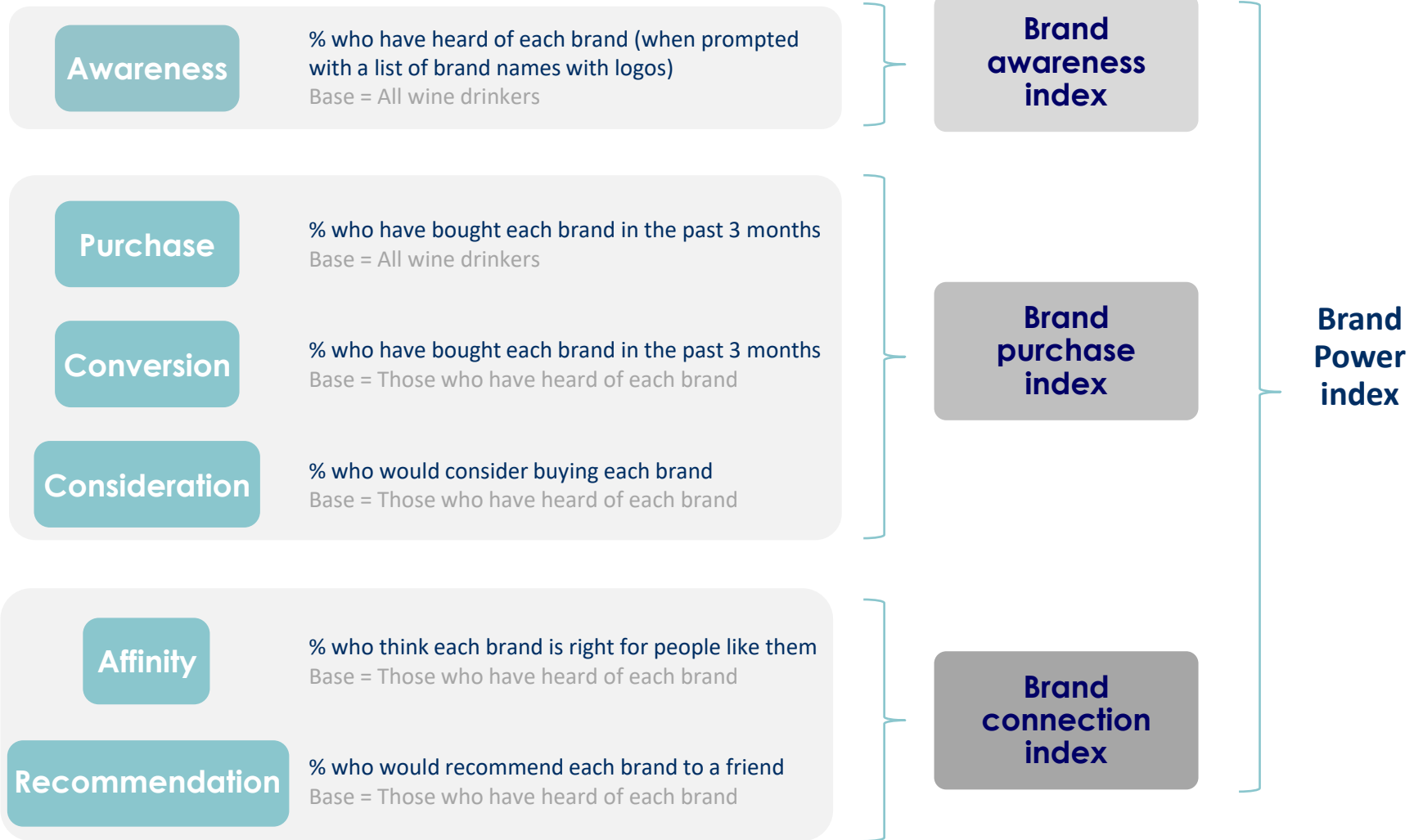
Feedback from consumers collected in Vinitrac® was analysed to calculate the wine brand power index

The index also accounts for the size of each of the 25 markets, with the individual scores within each market weighted by individual market size.

Note: Shifts in the Global Index scores may be as a result of the change in country coverage

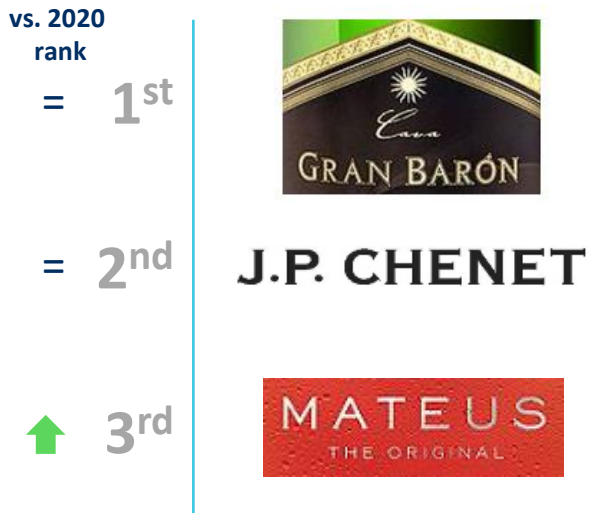


BRAND HEALTH MEASURES INCLUDED

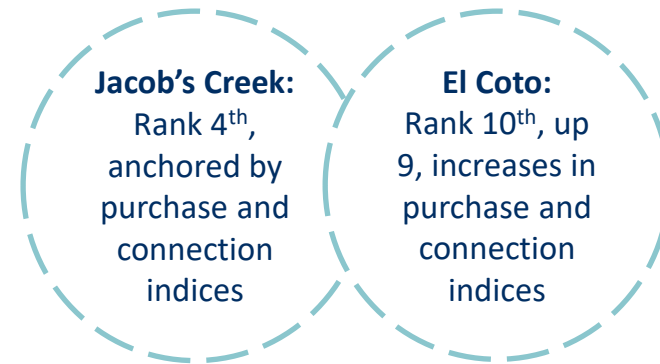


Note: The brands tested in each market change from year to year as brands grow and decline in importance within a given market, as well as to include high profile brand launches

EXAMPLE SLIDE: BELGIUM WINE BRAND POWER INDEX 2021



Notable performers



- Four brands have maintained their place in the top 5: Gran Barón and J.P. Chenet remain category leaders (despite purchase incidence decrease), ahead of Jacob's Creek and Casillero del Diablo (both placing 4th)
- Beyond these key players, there have been dramatic shifts in the top 15 rankings. Mateus replaces Mouton Cadet in third. The latter drops to 6th position, having lost ground across all Brand Power measures. Mateus swaps places to third position, due to increase in both purchase incidence and brand connection
- Several brands make their first appearance in the top 15: Gallo Family Vineyards, Yellow Tail, Hardys and El Coto. The main driver of these new entries is improvements in brand connection and / or purchase incidence, rather than changes in awareness

EXAMPLE SLIDE: BELGIUM WINE BRAND POWER INDEX 2021



Rank 2021	Brand	Rank vs 2020	Final index		Awareness		Purchase		Connection	
			2021	2020 score difference	2021 index	2020 score difference	2021 index	2020 score difference	2021 index	2020 score difference
1st	Gran Barón	=	92.1	-2.5	78.8	-6.3	98.6	-1.4	100.0	0.7
2nd	J.P. Chenet	=	83.0	-0.5	100.0	0.0	77.0	-2.7	70.1	1.4
3rd	Mateus	3↑	72.6	6.8	88.7	-1.5	60.3	8.9	68.2	13.9
4th=	Jacob's Creek	1↑	71.7	4.8	60.7	-2.2	65.4	6.0	91.8	11.4
4th=	Casillero del Diablo	=	71.7	-0.8	63.3	0.2	71.7	1.6	81.3	-4.6
6th	Mouton Cadet	-3↓	65.2	-8.0	69.3	-5.6	51.4	-9.2	76.7	-9.2
7th	Gato Negro	1↑	64.6	1.8	57.0	2.4	62.8	-0.9	75.7	4.3
8th	Roodeberg	-1↓	63.8	-0.5	35.3	-4.5	64.0	3.4	96.7	-0.4
9th	Lindeman's	=	60.6	0.7	70.5	-0.3	52.0	2.7	58.9	-0.4
10th	El Coto	9↑	55.1	7.8	29.3	0.5	53.4	8.8	87.2	15.2
11th	Torres	3↑	51.3	0.7	49.1	0.3	47.3	0.0	58.4	2.0
12th	Hardys	6↑	51.1	2.7	19.6	2.2	53.1	-3.3	85.3	10.4
13th	Yellow Tail	7↑	49.2	2.1	11.6	0.8	59.0	4.1	81.5	1.2
14th	Vieux Papes	1↑	48.7	-0.8	38.4	-2.0	40.5	-2.8	70.3	3.1
15th	Gallo Family Vineyards	1↑	48.1	-1.2	35.1	-2.1	47.6	-1.8	63.7	0.4

EXAMPLE METHODOLOGY: US

Vinitrac® US

All markets differ



- The data was collected in the US in January 2021
- October 2019 was tracked against January 2021
- Data was gathered via Wine Intelligence’s Vinitrac® online survey
- Respondents were screened to ensure that they were at least 21 years old; drank red, white, rosé or blush wine at least once a month; and bought 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, US Divisions and annual pre-tax household income
- The distribution of the sample is shown in the table:

		<i>n=</i>	Oct'19 2,004	Jan'21 2,000
Gender	Male		51%	43%
	Female		49%	57%
	Total		100%	100%
Age	21-24		8%	4%
	25-34		21%	14%
	35-44		20%	19%
	45-54		14%	16%
	55-64		15%	19%
	65 and over		22%	28%
	Total		100%	100%
US Divisions	New England		5%	6%
	Middle Atlantic		15%	17%
	East North Central		11%	13%
	West North Central		7%	7%
	South Atlantic		21%	20%
	East South Central		4%	6%
	West South Central		11%	11%
	Mountain		7%	6%
	Pacific		19%	15%
		Total		100%
Annual household income before taxes	Under \$20,000		7%	8%
	\$20,000 - \$39,999		20%	12%
	\$40,000 - \$59,999		19%	16%
	\$60,000 - \$79,999		16%	12%
	\$80,000 - \$149,999		26%	25%
	\$150,000+		9%	21%
	Prefer not to answer		2%	6%
		Total		100%

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