A division of the IWSR Group

Spain

Wine Landscapes 2023

Contents

Wine Intelligence Viewpoint

Spain has a monthly wine drinking population of 24 million, but the market is in a difficult position. There are question marks over the long-term future volume growth of the category, with fewer younger drinkers involved and a reduction in the number of people drinking wine on a daily basis

Even though at-home wine consumption saw small growth during the pandemic, it has decreased since 2020. The on-trade has not reached pre-pandemic levels, with many consumers preferring to drink wine in restaurants rather than bars. Despite a drop in wine consumption frequency, more money is spent on wine, although promotional offers have grown as a reason to buy wine in recent years, due to inflationary pressure on spending.

Spanish wine drinkers feel less confident about wine, have less interest in it and say their knowledge has declined since 2020. Younger consumers are willing to try new and different styles of wine but most people stick to what they know and like. They tend to choose Spanish regions and varieties over foreign ones, with a decrease in consumption of French, Portuguese, German, Chilean and other wines from abroad.

Wine drinkers prefers discount stores over specialist wine shops, with retailers such as Lidl growing in popularity. Larger packaging formats, including bag-in-box, are being purchased less and there is growing interest in small single-serve bottles.

Opportunities

High participation rates among adults.
Greater wine involvement.
Higher spend on wine.

Threats

Lower frequency of consumption.
Ageing wine drinking population.
Declining knowledge.

Management Summary

Spain Wine Landscapes

2023

Management summary

Key takeaways

1. 24 million adults in Spain are monthly wine drinkers

2. Still wine is yet to fully recover from the pandemic

3. Frequency of consumption has declined

4. Spanish wine has issues with recruiting young consumers

5. Spain's wine drinkers are less willing to experiment

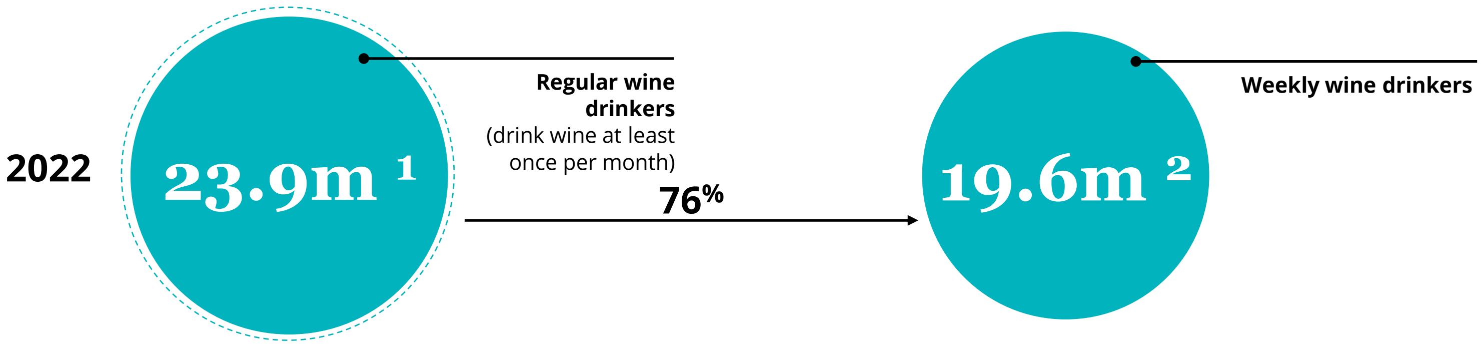
6. Discounters are preferred over specialist wine stores

1. 24 million adults in Spain are monthly wine drinkers

61% of the adult population within Spain drinks wine monthly, which amounts to just under 24 million people. Of these, more than three-quarters drink wine weekly, around 20 million

Wine drinking population in Spain

Those who drink wine at least once a month



1 Wine Intelligence online calibration study, rolling average of June 2021 & October 2022 (n=2.254) Spanish adults. Wine=still light wine (red, white, rosé)
2 Source: Wine Intelligence, Vinitrac®, Spain, Oct '22, (n=1,002) Spanish regular wine drinkers
Note: Please note the methodology has changed from interviews to online studies

2. Still wine is yet to fully recover from the pandemic

Between 2017 and 2022 the total amount of still wine sold in the Spanish market declined by 2.1%, with the largest year-on-year fall coming between 2019 and 2020. The category is expected to grow in the future however, with a forecast CAGR of 0.9% between 2022 and 2027

Total wine volumes by category

000s 9-litre cases

	2019	2020	2021	2022	CAGR 17-22	CAGR F 22-27
Total beverage alcohol	117,894.00	97,603.50	109,075.30	107,385.00	-1.7%	0.8%
Still Wine	102,060.00	84,555.30	93,922.00	91,457.00	-2.1%	0.9%
Sparkling Wine	10,041.50	8,492.50	9,360.50	9,903.50	0.4%	0.2%
Light Aperitifs	2,751.00	2,481.80	3,195.00	3,196.50	4.7%	0.5%
Fortified Wine	2,986.80	2,032.30	2,539.50	2,764.30	-3.1%	-0.7%
Other Wines	54.80	41.80	58.30	63.80	0.5%	2.7%

Market context:

Despite the government's best attempts to tackle inflation head on, growing cost-of-living concerns for certain sections of society drove significant share gains for private labels, and brought about a disappointing performance for still wine at the more sensitive entry-level segment – making it the only major category to experience decline

Executive Summary Report 2023 Spain

Other Wines includes non-grape based wines
Source: IWSR

3. Frequency of consumption has declined

The number of Spanish wine drinkers consuming the beverage daily has declined significantly since 2019. This could explain why volumes of still wine sold within the Spanish market are declining

Wine consumption frequency: Tracking

% who usually drink wine at the following frequency
Base = All Spanish regular wine drinkers (n≥1,002)

	2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
Most days / every day	**23%**	**20%**	**16%**	↓	↓
2-5 times a week	**33%**	**35%**	**36%**	→	→
About once a week	**29%**	**30%**	**30%**	→	→
1-3 times a month	**14%**	**15%**	**18%**	↑	→

Market context:

In H2 in particular, price inflation punished the more elastic entry-level segment as day to-day wine consumers were forced to reconsider their priorities; cutbacks, deal hunting and down-trading on brands and regions made for a volatile retail environment in which few emerged favourably

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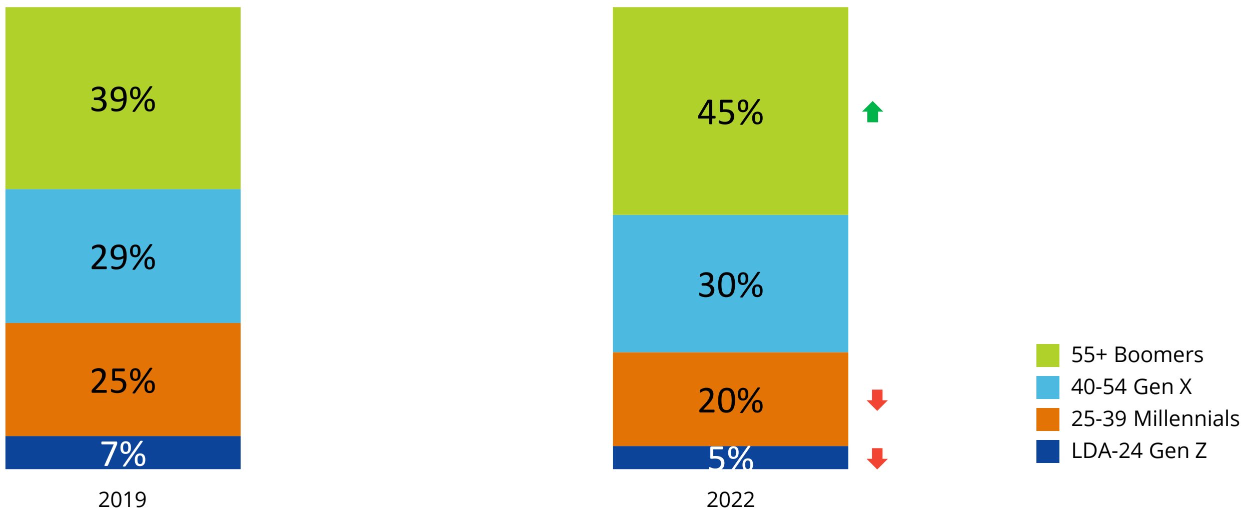
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

4. Spanish wine has issues with recruiting young consumers

Significantly fewer Gen Z and Millennial drinkers are classified as monthly wine drinkers than in 2019, while the proportion of those 55-plus who are has increased. This raises concerns about the long-term success of the wine category in Spain if younger drinkers are losing interest in it

Generation cohorts

Base = All Spanish regular wine drinkers (n≥1,002)



Market context:

Although younger LDA+ drinkers will remain critically important to the drinks market, shifting priorities mean there is more competition than ever before for their time and money; consumption within this cohort is expected to steadily decline

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

Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

5. Spain's wine drinkers are less willing to experiment

After the pandemic, significantly fewer regular wine drinkers say they are open to experimenting with their wine selection. This could be because the Millennial drinkers who are willing to try different styles of wine are not participating in the category in the numbers seen in past years

Attitudes towards wine: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All Spanish regular wine drinkers (n=1,002)

	2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
I enjoy trying new and different styles of wine on a regular basis	**58%**	**56%**	**53%**	↓	→
I don't mind what I buy so long as the price is right	**14%**	**14%**	**15%**	→	→
I know what I like and I tend to stick to what I know	**28%**	**30%**	**32%**	→	→

Attitudes towards wine by generation

% who 'agree' or 'strongly agree' with the following statements
Base = All Spanish regular wine drinkers (n=1,002)

	All Spanish Regular Wine Drinkers (n=1,002)	18-24 Gen Z (n=50)	25-39 Millenials (n=203)	40-54 Gen X (n=298)	55+ Boomers (n=451)
I enjoy trying new and different styles of wine on a regular basis	**53%**	**56%**	**68%**	**63%**	**40%**
I don't mind what I buy so long as the price is right	**15%**	**18%**	**17%**	**12%**	**15%**
I know what I like and I tend to stick to what I know	**32%**	**26%**	**15%**	**24%**	**45%**

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

6. Discounters are preferred over specialist wine stores

Supermarkets and hypermarkets continue to be the most used channel to buy wine, with Mercadona and Carrefour the most preferred retailers. Purchases in specialist wine stores have decreased since the pandemic ended, while shopping for wine in discount stores has increased

Wine-buying channel usage: Tracking

% who have bought wine from the following channels in the past six months
Base = All Spanish regular wine drinkers (n≥1,002)

Ranking '22		2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
1	In a supermarket or hypermarket	74%	74%	74%	→	→
2	In shopping malls	29%	26%	25%	↓	→
3	In an independent wine specialist store	23%	27%	23%	→	↓
4	In a discount store (eg Plus, Aldi)	20%	16%	21%	→	↑
5	In a gourmet store in a supermarket	21%	20%	16%	↓	↓
6	In a corner / convenience shop	15%	17%	15%	→	→
7	From the wine producer's cellar	20%	21%	14%	↓	↓
8	From a winery during a visit	n/a	n/a	11%	n/a	n/a
9	From a market	14%	12%	10%	↓	→
10	From another online wine store	8%	14%	9%	→	↓
11=	From a supermarket / hypermarket website	6%	11%	8%	→	→
11=	From a winery's website	n/a	n/a	8%	n/a	n/a
11=	From a wine club or membership organisation	10%	8%	8%	→	→
14	From a wholesaler (eg Makro...)	9%	8%	7%	→	→
15	From Duty Free (eg airports)	6%	4%	5%	→	→

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

Management summary: tracking metrics

Consumption trends in the Spanish wine market

Top alcoholic beverages

% who have drunk the following beverages in the past 12 months

	2019	2022	Tracking
Beer	**87%**	**88%**	→
Red wine	**89%**	**87%**	→
White wine	**78%**	**78%**	→
Cava	**54%**	**53%**	→
Gin	**44%**	**45%**	→

Top country of origin

% who have drunk wine from the following places in the past six months

	2019	2022	Tracking
Spain	**92%**	**95%**	→
France	**40%**	**36%**	↓
Italy	**28%**	**27%**	→
Portugal	**24%**	**19%**	↓
Chile	**11%**	**7%**	↓

Top region of origin

% who have drunk wine from the following regions in the past six months

	2019	2022	Tracking
Rioja	**60%**	**56%**	→
Ribera del Duero	**49%**	**47%**	→
Rueda	**24%**	**24%**	→
Rías Baixas	**19%**	**19%**	→
Ribeiro	**18%**	**17%**	→

Top wine brands

% who have bought the following brands in the past three months

	2019	2022	Tracking
Protos	**20%**	**22%**	→
Cune	**20%**	**21%**	→
Ramón Bilbao	**18%**	**18%**	→
Marqués de Cáceres	**17%**	**17%**	→
Don Simon	**15%**	**17%**	→

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '22, (n≥1,002) Spanish regular wine drinkers

Management summary: tracking metrics

Consumption trends in the Spanish wine market

Top red varietals

% who have drunk the following varietals in the past six months

	2019	2022	Tracking
Tempranillo	61%	58%	➡
Grenache / Garnacha	39%	36%	➡
Cabernet Sauvignon	38%	34%	⬇
Merlot	30%	28%	➡
Mencía	21%	18%	➡

Top wine-shopping channels

% who have bought wine from the following channels in the past six months

	2019	2022	Tracking
In a supermarket or hypermarket	74%	74%	➡
In shopping malls	29%	25%	⬇
In an independent wine specialist store	23%	23%	➡
In a discount store (eg Plus, Aldi)	20%	21%	➡
In a gourmet store in a supermarket	21%	16%	⬇

Top white varietals

% who have drunk the following varietals in the past six months

	2019	2022	Tracking
Verdejo	57%	56%	➡
Albariño	57%	56%	➡
Chardonnay	36%	31%	⬇
Moscatel	21%	25%	➡
Sauvignon Blanc	29%	23%	⬇

Top wine-buying retailers

% who mainly use the following retailers to buy wine

	2019	2022	Tracking
Mercadona	49%	44%	⬇
Carrefour	46%	43%	➡
El Corte Inglés	32%	28%	⬇
Lidl	18%	22%	⬆
Alcampo	13%	15%	➡

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '22, (n≥1,002) Spanish regular wine drinkers

Market Data

Spain Wine Landscapes

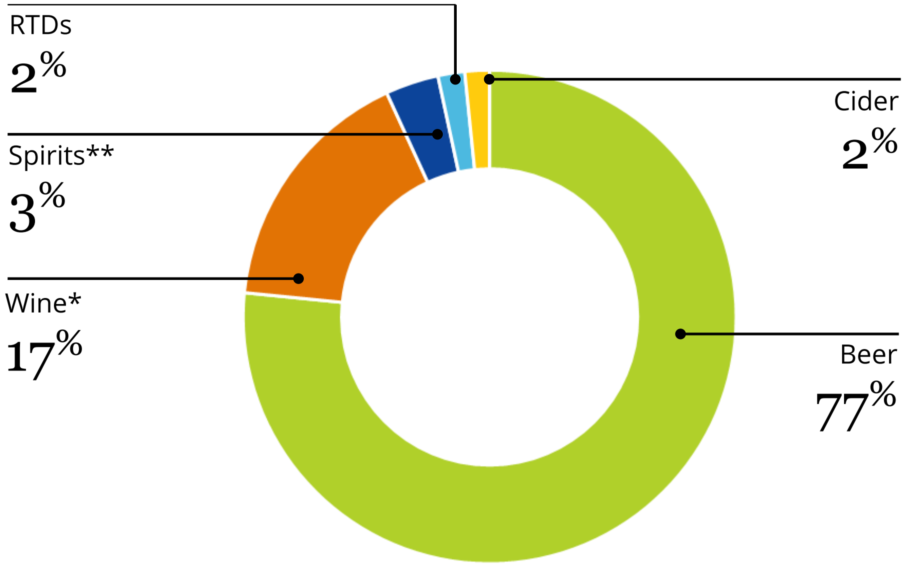
2023

Total beverage alcohol market share by category

Beer dominates, with more than three-quarters of the alcohol market; RTDs is one of the categories forecast to grow the most

Total beverage alcohol market share by category

% of purchases that fall within the categories below



Total beverage alcohol market volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total beverage alcohol	618,898.83	648,006.41	1.4%	0.8%
Beer	469,872.22	496,183.33	2.3%	0.8%
Wine*	109,075.25	107,385.00	-1.7%	0.8%
Spirit**	19,629.75	22,625.50	1.2%	0.0%
RTDs	10,535.50	11,354.25	1.0%	1.3%
Cider	9,786.11	10,458.33	1.1%	1.0%

Source: IWSR

* Wine includes non-grape based wines, still wine, sparkling wine, fortified wine and light aperitifs

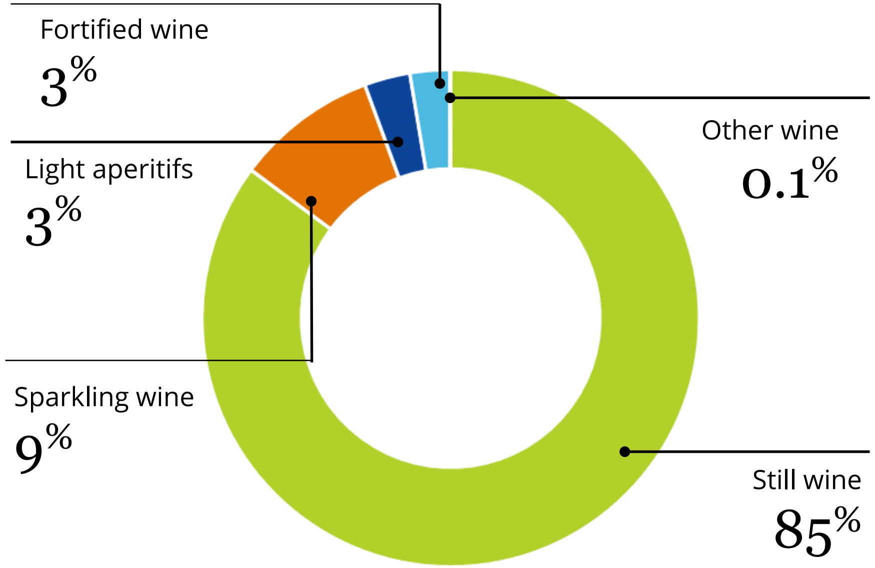
** Spirits include whisky, gin and genever, vodka, agave-based spirits, national spirits, rum, cane, brandy and flavored spirits

Total wine market volumes

Sparkling wine and light aperitifs grew most in the past five years

Total wine share by category

% of purchases that fall within the categories below



Total wine volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total Wine	109,075.25	107,385.00	-1.7%	0.8%
Still Wine	93,922.00	91,457.00	-2.1%	0.9%
Sparkling Wine	9,360.50	9,903.50	0.4%	0.2%
Light Aperitifs	3,195.00	3,196.50	4.7%	0.5%
Fortified Wine	2,539.50	2,764.25	-3.1%	-0.7%
Other Wines	58.25	63.75	0.5%	2.7%

Other Wines includes non-grape based wines

Source: IWSR

Still wine volumes by origin

Local wine dominates the market; wines from other countries have increased in volume and are expected to grow further, but their market share remains small

Total still wine volumes and market share by origin

000s 9-litre cases

		2021	2022	CAGR 17-22	CAGR F 22-27	Market Share
	Total	93,922.00	91,457.00	-2.1%	0.9%	
1	Spanish	92,284.50	89,274.80	-2.3%	0.9%	98%
2	Portuguese	504.80	691.00	15.3%	0.7%	1%
3	French	449.50	654.50	18.5%	1.9%	1%
4	Italian	297.80	388.00	8.4%	0.7%	0.4%
5	Australian	107.50	115.00	6.2%	8.2%	0.1%
6	German	81.80	109.50	6.3%	0.6%	0.1%
7	Argentinian	50.00	70.00	1.0%	7.2%	0.1%
8	US	78.50	68.80	-9.8%	-6.7%	0.1%
9	International	25.00	35.00	-4.8%	7.5%	0.0%
10	Chilean	25.00	30.00	-11.5%	5.8%	0.0%

*International refers to wine where grapes are from multiple countries of origin

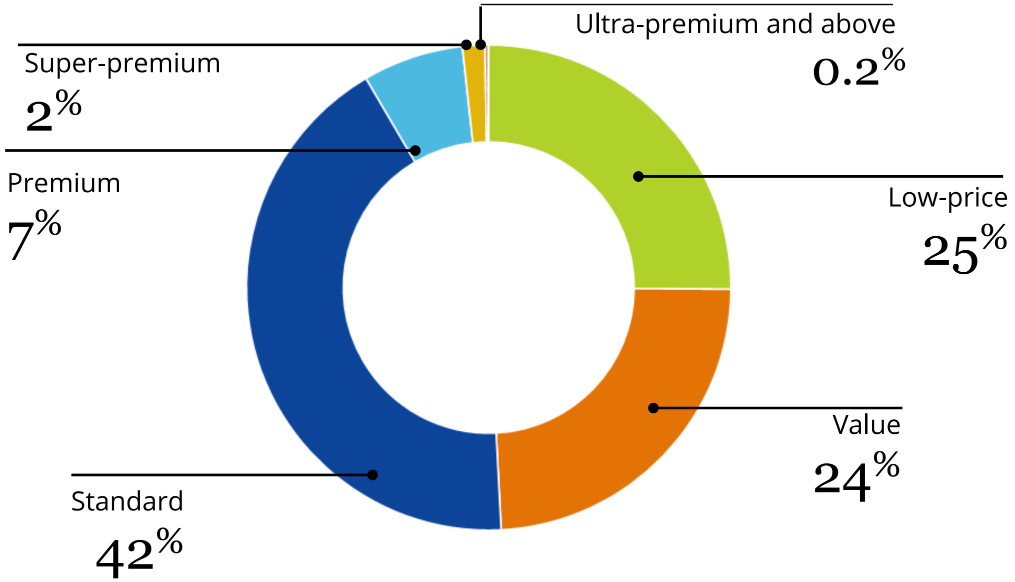
Source: IWSR

Still wine by price band

Low-priced and value wines continue to lose market share, but the premium category is growing and forecast to continue to do so in the next five years

Still wine by price band

% of purchases that fall within the categories below



Still wine volumes by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Low-Price (under €2.50)	24,637.50	22,964.75	-7.4%	-1.1%
Value (between €2.50 and €3.49)	23,541.75	22,008.50	-0.1%	1.4%
Standard (between €3.50 and €7.49)	38,193.15	38,737.75	0.1%	1.4%
Premium (between €7.50 and €14.99)	5,928.60	6,136.50	0.7%	3.1%
Super Premium (between €15.00 and €24.99)	1,388.25	1,373.25	1.8%	1.7%
Ultra Premium (between €25.00 and €39.99)	179.70	179.15	-1.4%	1.3%
Prestige (over €40.00)	53.05	57.10	-3.5%	4.9%

Market context:

The Spanish still wine market has been characterised by a long-term less-but-better movement that has seen the DO segment increase its share against lower-quality table wines

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Source: IWSR

Still wine retail price by origin

French, Argentinian, US and Chilean wines retail for the highest prices in the Spanish market; Portugal and Germany compete at similar price points to Spain

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a variable exchange rate

		Retail price per 0.75l 2022 (US$)	CAGR 17-22	CAGR F 22-27
	Total	4.83	4.4%	0.6%
1	Spanish	4.80	4.4%	0.6%
2	Portuguese	4.16	3.7%	0.1%
3	French	7.83	1.7%	1.4%
4	Italian	6.88	4.0%	0.2%
5	Australian	6.56	4.6%	0.1%
6	German	4.98	2.4%	0.3%
7	Argentinian	7.07	4.1%	0.2%
8	US	7.59	15.2%	1.0%
9	International	5.56	6.9%	0.0%
10	Chilean	9.18	5.8%	-0.3%

*International refers to wine where grapes are from multiple countries of origin

Source: IWSR

Still wine consumption per capita

Spain ranks 24th in the world for per-capita consumption, and has shown a slight decrease across the past five years. St Martin/St Maarten and St Barths are the countries where consumption has increased the most

Per capita consumption of still wine

Litres per annum (adult LDA+ population)

		2021	2022	CAGR 17-22	CAGR 21-22
1	St. Martin and St. Maarten	46.70	49.00	12.3%	5.0%
2	Portugal	43.00	45.70	-0.9%	6.3%
3	Montenegro	41.80	42.60	-0.9%	2.0%
4	Italy	42.20	39.90	-2.8%	-5.2%
5	Slovenia	37.60	37.80	-2.8%	0.5%
6	St. Barths	33.90	37.20	9.3%	9.8%
7	Switzerland	36.10	34.90	-1.5%	-3.3%
8	France	35.70	33.90	-5.2%	-5.0%
9	Greece	28.00	33.80	0.5%	20.9%
10	Hungary	31.50	32.70	0.6%	3.6%
11	Denmark	33.40	31.00	-1.2%	-7.1%
12=	Austria	30.90	30.10	-1.3%	-2.6%
12=	Turks and Caicos	27.60	30.10	-2.9%	9.2%
14=	Romania	27.50	27.90	2.4%	1.2%
14=	US Virgin Islands	27.80	27.90	-2.6%	0.3%
16	Germany	26.50	25.30	-2.5%	-4.8%
17	Argentina	25.30	24.90	-2.7%	-1.5%
18	Malta	21.20	24.30	-6.4%	14.9%
19=	Uruguay	25.60	23.40	-1.3%	-8.6%
19=	Slovakia	22.90	23.40	-0.1%	1.9%
24=	Spain	22.12	21.43	-2.4%	-3.1%

Source: IWSR

Sparkling wine volumes by origin

Spanish sparkling wine has the largest market share, followed by Italian and French

Total sparkling wine volumes and market share by origin

000s 9-litre cases

		2021	2022	CAGR 17-22	CAGR F 22-27	Market Share
	Total	9,360.50	9,903.50	0.4%	0.2%	
1	Spanish	7,775.65	8,257.25	-0.2%	0.4%	83%
2	Italian	1,108.75	1,154.75	3.5%	-1.4%	12%
3	French	445.85	459.50	4.1%	0.8%	5%
4	German	12.00	15.00	6.4%	3.1%	0.2%
5	International	10.00	10.00	2.1%	-5.6%	0.1%

*International refers to wine where grapes are from multiple countries of origin

Source: IWSR

Sparkling wine retail price by origin

French sparkling wines reach the most premium price points, while Italy has the most competitive prices

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a variable exchange rate

		Retail price per 0.75l 2022 (US$)	CAGR 17-22	CAGR F 22-27
	Total	6.44	3.3%	1.4%
1	Spanish	5.09	3.1%	1.1%
2	Italian	4.50	1.8%	1.7%
3	French	35.68	1.1%	1.7%
4	German	6.32	1.6%	0.0%
5	International	3.15	1.4%	0.0%

*International refers to wine where grapes are from multiple countries of origin

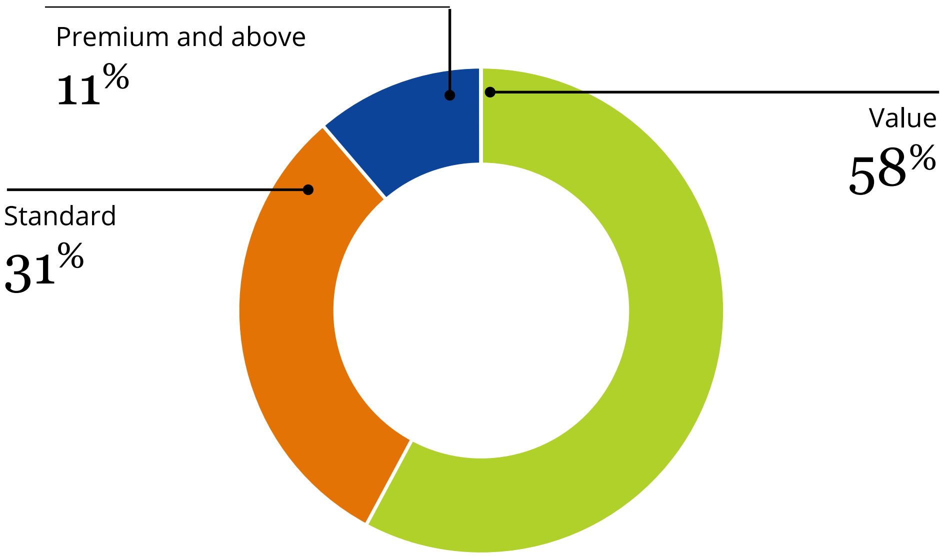
Source: IWSR

Sparkling wine by price band

Most sparkling wine in Spain is sold between €3.00 and €8.99

Sparkling wine by price brand

% of purchases that fall within the categories below



Note: Sparkling wine includes all sparkling wine types except Champagne, and includes low and no sparkling wine types

Sparkling wine volumes by price band

'000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Value (under €3.00)	5,440.5	5,674.8	0.4%	-1.6%
Standard (between €3.00 and €8.99)	2,343.3	2,530.8	-1.0%	3.0%
Premium (€9.00 and over)	1,121.0	1,197.0	2.5%	2.2%

*Other sparkling wine includes all sparkling wine types except Champagne, and includes low and no sparling wine types

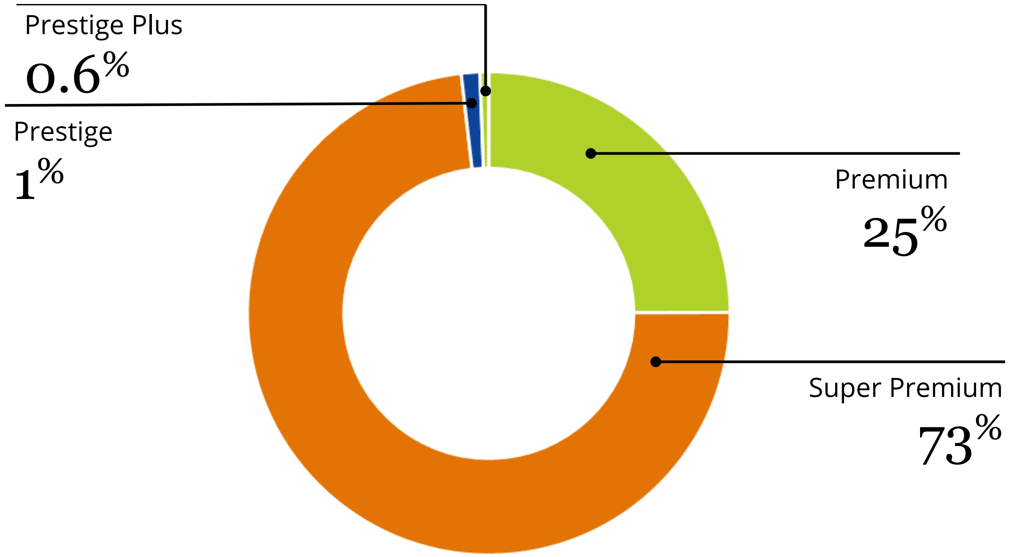
Source: IWSR

Champagne by price band

The majority of Champagne sold in the Spanish market is in the super-premium price band

Champagne by price brand

% of purchases that fall within the categories below



Champagne volumes by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Premium (under €30.00)	76.25	98.75	9.7%	-1.8%
Super Premium (between €30.00 and €99.99)	278.75	290.00	1.8%	2.6%
Prestige (between €100.00 and €199.99)	4.25	4.95	-6.1%	7.8%
Prestige Plus (€200.00 and over)	1.50	2.30	18.6%	7.5%

Source: IWSR

Sparkling wine consumption per capita

Spain is a top 30 country for per capita consumption of sparkling wine, with consumption levels staying the same between 2017 and 2022

Per capita consumption of sparkling wine

Litres per annum (LDA+ adults)

		2021	2022	CAGR 17-22	CAGR 21-22
1	St. Barths	12.50	13.60	13.1%	8.9%
2	St. Martin and St. Maarten	6.30	8.30	21.7%	32.6%
3	Italy	7.90	7.40	-1.2%	-6.2%
4	Turks and Caicos	5.30	6.50	-2.4%	23.4%
5	Germany	5.30	5.50	-1.9%	3.7%
6	Lithuania	4.90	5.10	7.3%	3.6%
7=	Latvia	4.50	4.90	2.6%	9.4%
7=	France	4.70	4.90	-1.3%	2.7%
9	Guadeloupe	4.20	4.80	-1.8%	15.5%
10	Martinique	4.20	4.40	-4.6%	4.8%
11=	Estonia	4.10	4.30	4.0%	6.3%
11=	Belgium and Luxembourg	4.30	4.30	-1.5%	-0.2%
13=	Austria	3.40	3.50	0.3%	2.9%
13=	Switzerland	3.20	3.30	0.9%	3.0%
13=	Cayman Islands	3.10	3.30	2.1%	5.8%
13=	Sweden	3.30	3.30	6.7%	0.6%
17=	United Kingdom	3.20	3.00	-0.6%	-4.8%
17=	Slovenia	2.90	3.00	3.0%	4.1%
19=	New Zealand	3.10	2.90	-1.6%	-6.1%
19=	Reunion	2.60	2.90	0.7%	14.7%
29	Spain	2.20	2.30	0.0%	5.3%

Source: IWSR

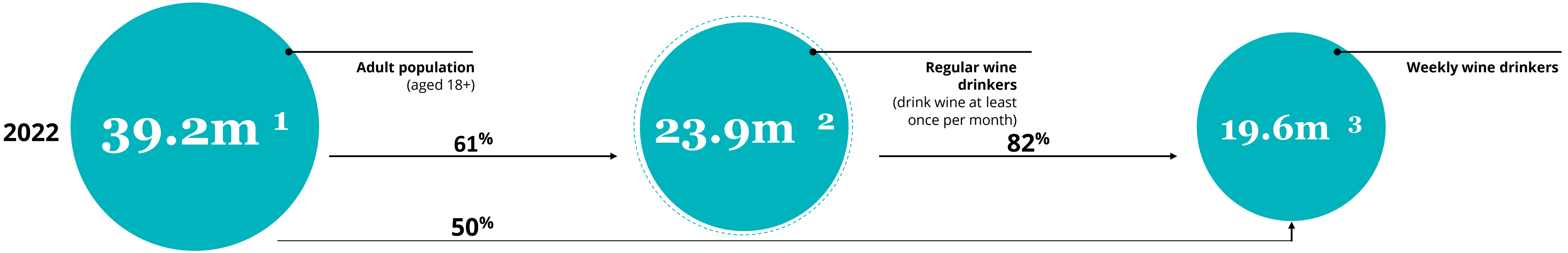
Market Demographics

Spain Wine Landscapes

2023

Spanish regular wine drinkers

The Spanish market has just shy of 24 million monthly wine drinkers, with over 80% of them drinking wine on a weekly basis

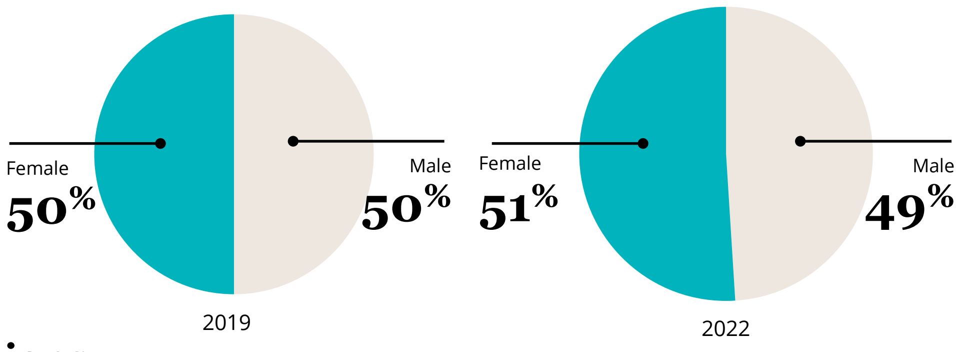


Sources:
1 INE
2 Wine Intelligence online calibration study, rolling average of June 2021 & October 2022 (n=2.254) Spanish adults. Wine=still light wine (red, white, rosé)
3 Source: Wine Intelligence, Vinitrac®, Spain, Oct '22, (n=1,002) Spanish regular wine drinkers
Note: Please note the methodology has changed from interviews to online studies

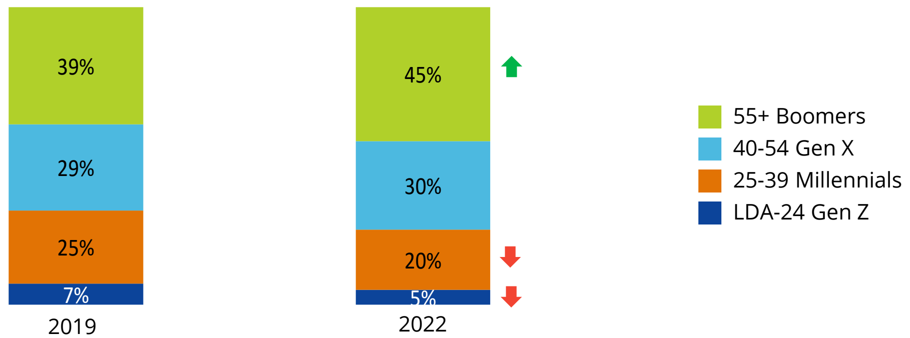
Demographics of Spanish regular wine drinkers

The proportion of Gen Z and Millennials involved in the wine category has decreased significantly and could impact the long-term success of the category

Gender



Generation cohorts



Regions

	2019	2022	Tracking
North West	22%	16%	↓
North East	27%	36%	↑
Centre	24%	24%	→
South	27%	23%	↓

Monthly household income before tax

	2019	2022	Tracking
Under €15,000	10%	11%	→
€15,000 - €18,000	10%	9%	→
€18,001 - €24,000	20%	21%	→
€24,001 or more	51%	53%	→
Prefer not to answer	9%	6%	↓

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '22, (n≥1,002) Spanish regular wine drinkers

Drinking Repertoire

Spain Wine Landscapes

2023

Drinking repertoire

Cava consumption has increased in recent years but, overall, regular wine drinkers' repertoires have narrowed since the pandemic. Beer is the most widely consumed beverage, closely followed by red wine and white wine

Alcoholic beverage repertoire: Tracking

% who have drunk the following beverages in the past 12 months
Base = All Spanish regular wine drinkers (n≥1,002)

Ranking '22		2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
1	Beer	87%	87%	88%	→	→
2	Red wine	89%	87%	87%	→	→
3	White wine	78%	77%	78%	→	→
4	Cava	54%	48%	53%	→	↑
5	Gin	44%	42%	45%	→	→
6	Alcohol-free beer	40%	35%	38%	→	→
7	Rosé wine	37%	36%	36%	→	→
8	Craft beer	35%	36%	34%	→	→
9=	Rum	38%	35%	32%	↓	→
9=	Lambrusco	38%	37%	32%	↓	↓
11=	Sangria	36%	34%	31%	↓	→
11=	Whisky / Whiskey	36%	36%	31%	↓	↓
13=	Liqueurs	34%	34%	29%	↓	↓
13=	Cider	36%	33%	29%	↓	↓
15	Sweet / dessert wine	23%	22%	22%	→	→
16	Cocktails	18%	19%	18%	→	→
17	Champagne (French Champagne)	18%	17%	17%	→	→
18	Vodka	22%	20%	16%	↓	↓
19	Sherry	19%	18%	15%	↓	→
20	Other "vinos de aguja"	14%	12%	13%	→	→

=Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

Varietal consumption

Tempranillo is by far the most consumed red varietal in Spain; Verdejo and Albariño are the most popular white varietals

White varietal consumption: Tracking

% who have drunk the following varietals or wine types in the past six months
Base = All Spanish regular wine drinkers (n≥1,002)

Ranking '22		2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
1=	Verdejo	57%	52%	56%	→	→
1=	Albariño	57%	58%	56%	→	→
3	Chardonnay	36%	31%	31%	↓	→
4	Moscatel	21%	23%	25%	→	→
5	Sauvignon Blanc	29%	26%	23%	↓	→
6	Godello	14%	13%	15%	→	→
7	Macabeo / Viura	12%	13%	12%	→	→
8	Pinot Grigio / Pinot Gris	10%	8%	9%	→	→
9	Riesling	7%	8%	6%	→	→
10=	Airén	6%	5%	5%	→	→
10=	Gewürztraminer	7%	6%	5%	→	→
12	Viognier	3%	4%	3%	→	→

Red varietal consumption: Tracking

% who have drunk the following varietals or wine types in the past six months
Base = All Spanish regular wine drinkers (n≥1,002)

Ranking '22		2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
1	Tempranillo	61%	58%	58%	→	→
2	Grenache / Garnacha	39%	39%	36%	→	→
3	Cabernet Sauvignon	38%	34%	34%	↓	→
4	Merlot	30%	30%	28%	→	→
5	Mencía	21%	18%	18%	→	→
6	Pinot Noir	20%	18%	17%	→	→
7	Shiraz / Syrah	14%	12%	11%	→	→
8	Malbec	10%	12%	10%	→	→
9=	Mazuelo	9%	8%	7%	→	→
9=	Prieto Picudo	9%	10%	7%	→	↓
11=	Graciano	7%	9%	6%	→	↓
11=	Bobal	7%	7%	6%	→	→
13	Sangiovese	7%	5%	4%	↓	→

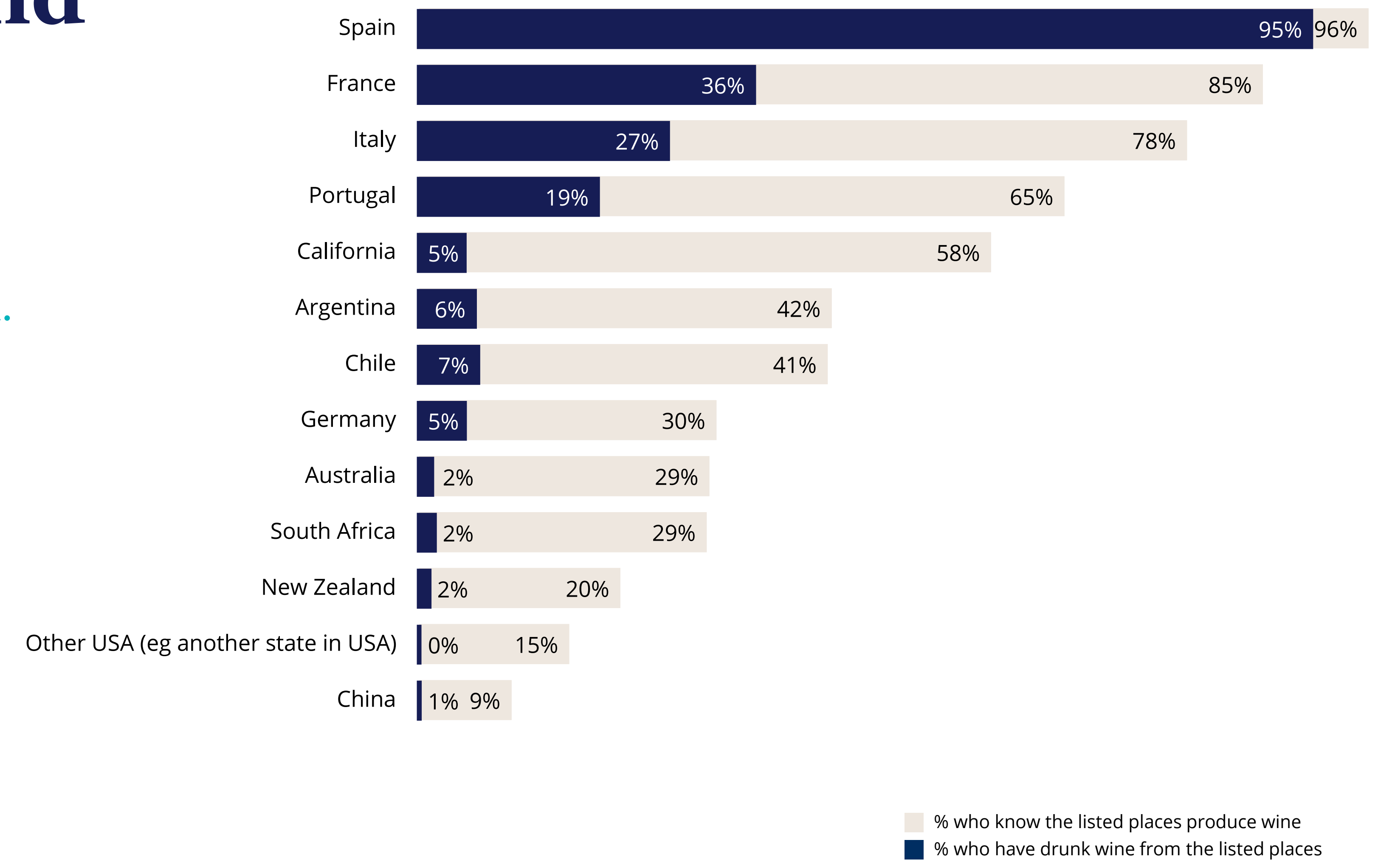
= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

Country of origin consumption and awareness

Spanish wine drinkers are Eurocentric in their consumption, with Spain dominating the market, both in awareness and consumption. Outside of wines from Spain, wine drinkers are most aware of French and Italian

Country of origin: Awareness and consumption levels

% of those who know of or drunk wine from the following places in the past six months
Base = All Spanish regular wine drinkers (n=1,002)



Source: Wine Intelligence, Vinitrac®, Spain, Oct '22, (n=1,002) Spanish regular wine drinkers

Country of origin awareness

Lesser-known countries have significantly lower awareness incidences, especially those outside Europe; Italy, Germany and regions of the US other than California have been decreasing significantly since 2020

Country of origin awareness: Tracking

% of those who know the following places produce wine
Base = All Spanish regular wine drinkers (n≥1,002)

Ranking '22		2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
1	Spain	95%	95%	96%	→	→
2	France	87%	84%	85%	→	→
3	Italy	79%	81%	78%	→	↓
4	Portugal	65%	67%	65%	→	→
5	California	62%	57%	58%	→	→
6	Argentina	44%	42%	42%	→	→
7	Chile	46%	42%	41%	↓	→
8	Germany	36%	34%	30%	↓	↓
9=	Australia	31%	31%	29%	→	→
9=	South Africa	34%	28%	29%	↓	→
11	New Zealand	21%	20%	20%	→	→
12	Other USA (eg another state in USA)	20%	24%	15%	↓	↓
13	China	n/a	11%	9%	n/a	→

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

Country of origin consumption

Spanish wine is the most widely consumed and its lead over France has increased since 2019; several countries have seen their consumption incidences decrease significantly since 2019, which could indicate that respondents are losing interest in wine from abroad

Country of origin consumption: Tracking

% who have drunk wine from the following places in the past six months
Base = All Spanish regular wine drinkers (n≥1,002)

Ranking '22		2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking	
					vs. '19	vs. '20
1	Spain	92%	94%	95%	→	→
2	France	40%	34%	36%	↓	→
3	Italy	28%	27%	27%	→	→
4	Portugal	24%	21%	19%	↓	→
5	Chile	11%	8%	7%	↓	→
6	Argentina	7%	8%	6%	→	→
7=	Germany	8%	5%	5%	↓	→
7=	California	5%	4%	5%	→	→
9=	South Africa	3%	1%	2%	→	→
9=	Australia	2%	2%	2%	→	→
9=	New Zealand	1%	1%	2%	→	→
12	China	n/a	1%	1%	n/a	→
13=	Other USA (eg another state in USA)	2%	1%	0%	↓	→

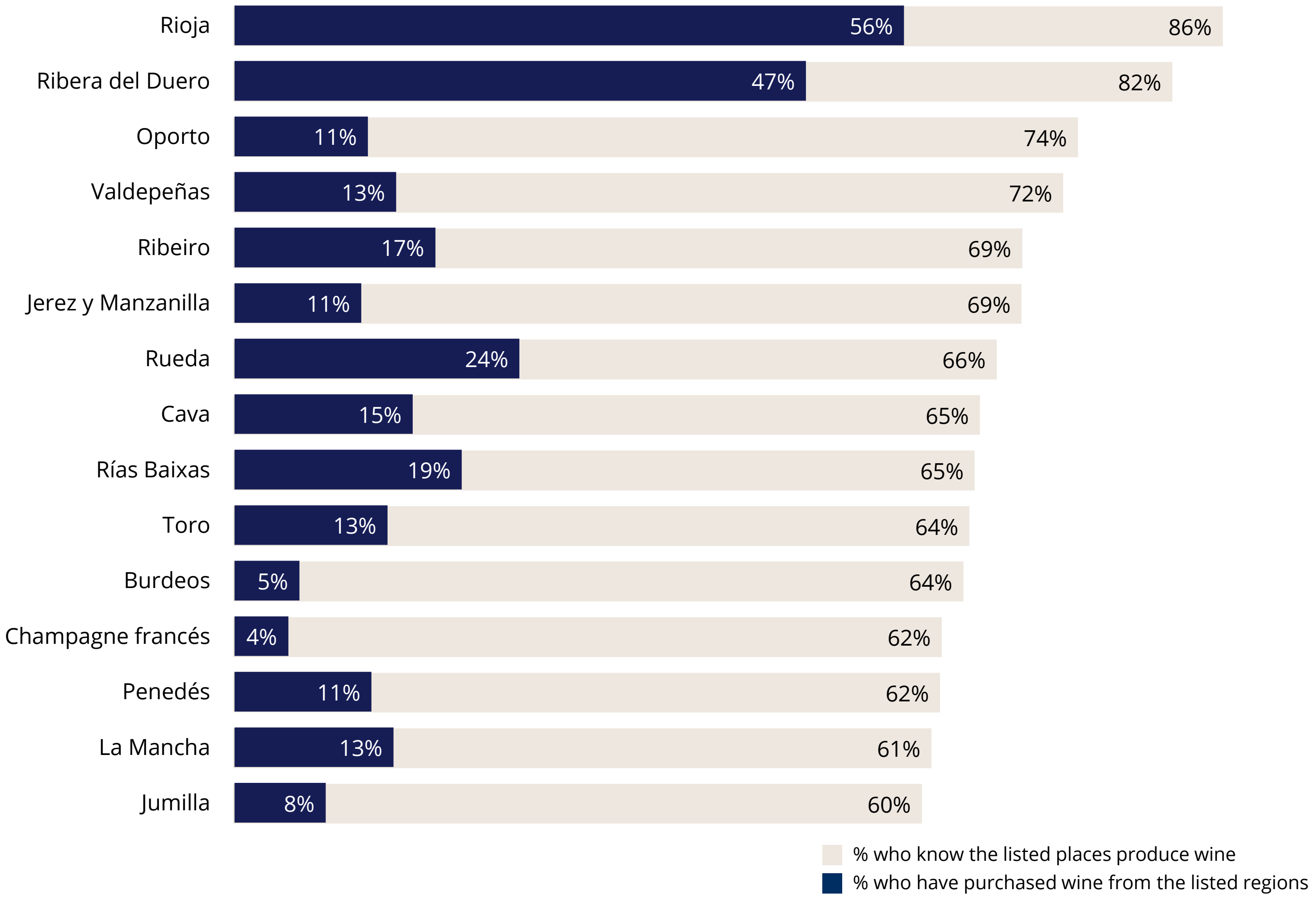
= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

Region of origin purchase and awareness

Rioja and Ribera del Duero are the most well-known regions in the Spanish market and their wines are the most purchased. Rueda and Rías Baixas have high purchase levels relative to their awareness incidences

Region of origin: Top 15 awareness and purchase levels

% of those who know of or have bought wine from the following wine-producing regions in the past three months
Base = All Spanish regular wine drinkers (n=1,002)



Source: Wine Intelligence, Vinitrac®, Spain, Oct '22, (n=1,002) Spanish regular wine drinkers

Region of origin awareness

Oporto, Valdepeñas and Champagne have become less well-known among Spanish regular wine drinkers in recent years

Region of origin awareness: Top 15, tracking

% of those who know the following regions produce wine
Base = All Spanish regular wine drinkers (n≥1,002)

Ranking '22		2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
1	Rioja	89%	87%	86%	→	→
2	Ribera del Duero	84%	83%	82%	→	→
3	Oporto	80%	77%	74%	↓	↓
4	Valdepeñas	78%	75%	72%	↓	→
5=	Ribeiro	75%	74%	69%	↓	↓
5=	Jerez y Manzanilla	75%	70%	69%	↓	→
7	Rueda	69%	65%	66%	→	→
8=	Cava	68%	67%	65%	→	→
8=	Rías Baixas	68%	68%	65%	→	→
10=	Toro	63%	61%	64%	→	→
10=	Burdeos	67%	67%	64%	→	→
12=	Champagne francés	67%	66%	62%	↓	↓
12=	Penedés	64%	63%	62%	→	→
14	La Mancha	66%	65%	61%	↓	→
15	Jumilla	63%	62%	60%	→	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

Region of origin consumption

Region of origin consumption has remained broadly stable among Spanish regular wine drinkers over recent years

Region of origin consumption: Top 15, tracking

% who have bought wine from the following wine-producing regions in the past three months
Base = All Spanish regular wine drinkers (n≥1,002)

Ranking '22		2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
1	Rioja	60%	56%	56%	→	→
2	Ribera del Duero	49%	48%	47%	→	→
3	Rueda	24%	24%	24%	→	→
4	Rías Baixas	19%	21%	19%	→	→
5	Ribeiro	18%	21%	17%	→	↓
6	Cava	14%	15%	15%	→	→
7=	Valdepeñas	15%	17%	13%	→	↓
7=	La Mancha	14%	13%	13%	→	→
7=	Toro	13%	13%	13%	→	→
10=	Penedés	11%	11%	11%	→	→
10=	Oporto	12%	13%	11%	→	→
10=	Jerez y Manzanilla	12%	12%	11%	→	→
13	Navarra	9%	10%	10%	→	→
14	Catalunya	8%	7%	9%	→	→
15=	Vinos de Madrid	6%	7%	8%	↑	→

= Represents equal ranking

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

Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

Wine-Buying Behaviours

Spain Wine Landscapes

2023

Wine-buying channel usage

Supermarkets and hypermarkets have been the main wine buying channel in Spain in recent years. Specialist stores and online have lower buying incidences than before, while discount stores have grown as channels for buying wine since the pandemic

Wine-buying channel usage: Tracking

% who have bought wine from the following channels in the past six months
Base = All Spanish regular wine drinkers (n≥1,002)

Ranking '22		2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
1	In a supermarket or hypermarket	74%	74%	74%	→	→
2	In shopping malls	29%	26%	25%	↓	→
3	In an independent wine specialist store	23%	27%	23%	→	↓
4	In a discount store (eg Plus, Aldi)	20%	16%	21%	→	↑
5	In a gourmet store in a supermarket	21%	20%	16%	↓	↓
6	In a corner / convenience shop	15%	17%	15%	→	→
7	From the wine producer's cellar	20%	21%	14%	↓	↓
8	From a winery during a visit	n/a	n/a	11%	n/a	n/a
9	From a market	14%	12%	10%	↓	→
10	From another online wine store	8%	14%	9%	→	↓
11=	From a supermarket / hypermarket website	6%	11%	8%	→	→
11=	From a winery's website	n/a	n/a	8%	n/a	n/a
11=	From a wine club or membership organisation	10%	8%	8%	→	→
14	From a wholesaler (eg Makro...)	9%	8%	7%	→	→
15	From Duty Free (eg airports)	6%	4%	5%	→	→

25% are online wine buyers vs **14%** in 2019

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

Wine-buying retailer usage

Mercadona and Carrefour are the main retailers chosen by Spanish wine drinkers, although significantly fewer respondents are now shopping at Mercadona than in previous years

Wine-buying retailer usage: Tracking

% who mainly use the following retailers to buy wine
Base = All Spanish regular wine drinkers (n≥1,002)

Ranking '22		2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
1	Mercadona	49%	46%	44%	⬇	➡
2	Carrefour	46%	43%	43%	➡	➡
3	El Corte Inglés	32%	31%	28%	⬇	➡
4	Lidl	18%	19%	22%	⬆	➡
5	Alcampo	13%	13%	15%	➡	➡
6	Hipercor	13%	11%	11%	➡	➡
7	Eroski	12%	9%	10%	➡	➡
8=	Consum	6%	6%	9%	⬆	⬆
8=	Día	11%	12%	9%	➡	⬇
10	Aldi	5%	4%	8%	⬆	⬆
11	Gadis	3%	4%	3%	➡	➡
12=	Caprabo	2%	3%	2%	➡	➡
12=	Spar	1%	2%	2%	⬆	➡
12=	Makro	3%	4%	2%	➡	➡
15=	Alimerka	2%	2%	1%	⬇	⬇
15=	Lavinia	2%	1%	1%	➡	➡
15=	El Árbol	1%	1%	1%	➡	➡
15=	SuperSol	1%	1%	1%	➡	➡

= Represents equal ranking

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

Consumption frequency

Everyday wine consumption has been decreasing since 2019. Spanish Boomers have significantly higher daily consumption incidences than regular wine drinkers in general

Market context:

Premiumisation and less-but-better consumption patterns will remain a defining characteristic of the market, although the strength and pace of this development will be significantly impacted by the economic context

Executive Summary Report 2023 Spain

Wine consumption frequency: Tracking

% who usually drink wine at the following frequency
Base = All Spanish regular wine drinkers (n≥1,002)

	2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
Most days / every day	**23%**	**20%**	**16%**	⬇	⬇
2-5 times a week	**33%**	**35%**	**36%**	➡	➡
About once a week	**29%**	**30%**	**30%**	➡	➡
1-3 times a month	**14%**	**15%**	**18%**	⬆	➡

Wine consumption frequency: by generation

% who usually drink wine at the following frequency
Base = All Spanish regular wine drinkers (n=1,002)

	All Spanish Regular Wine Drinkers (n=1,002)	18-24 Gen Z (n=50)	25-39 Millenials (n=203)	40-54 Gen X (n=298)	55+ Boomers (n=451)
Most days / every day	**16%**	**10%**	**11%**	**10%**	**22%**
2-5 times a week	**36%**	**26%**	**33%**	**40%**	**35%**
About once a week	**30%**	**22%**	**33%**	**30%**	**30%**
1-3 times a month	**18%**	**42%**	**23%**	**19%**	**13%**

% / %: Statistically significantly higher / lower than all Spanish regular wine drinkers at a 95% confidence level
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

Off-trade consumption frequency

Drinking wine to relax at the end of the day or with informal meals at home were more frequent during the pandemic, but consumption on these occasions dropped after 2020

Off-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the off-trade

	2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
A relaxing drink at the end of the day at home	**4.63**	**5.27**	**4.21**	→	↓
With an informal meal at home	**8.35**	**8.23**	**7.64**	→	→
With a more formal dinner party at home	**4.77**	**5.33**	**4.68**	→	↓
At a party / celebration at home	**2.68**	**2.43**	**2.36**	→	→

Note: Table above shows the number of days per month that consumers are drinking wine at these occasions

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

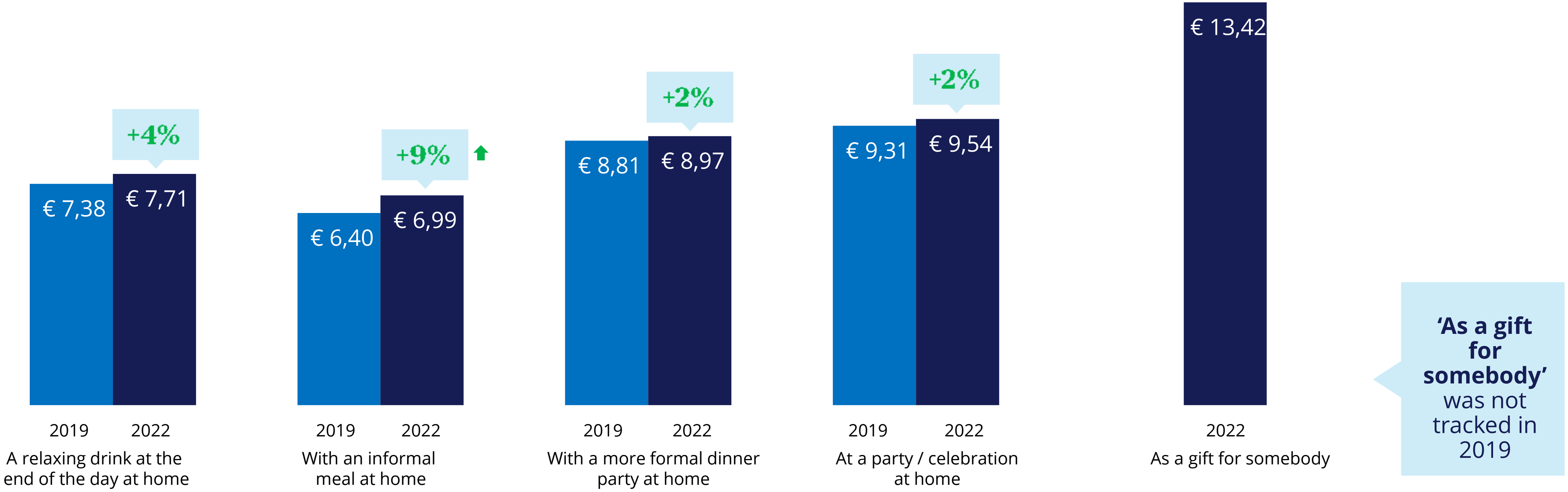
Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

Average off-trade spend

Spanish regular wine drinkers spend more on each occasion than they used to in 2019, especially for an informal meal at home, where spend has increased significantly

Off-trade: Average spend per bottle by occasion

Base = Those who buy wine in the off-trade



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

Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '22, (n≥1,002) Spanish regular wine drinkers

On-trade consumption

Wine is mainly bought in restaurants when Spanish wine drinkers consume it in the on-trade. Younger age groups drink wine in bars or pubs significantly more than Gen X and Boomers

Wine purchase in on-trade*

% who buy wine in a bar, pub or restaurant
Base = All Spanish regular wine drinkers (n≥1,002)

On-trade location		2019 (n=1,073)	2022 (n=1,002)	Tracking vs. '19
Bar or pub	Yes	29%	28%	➡
	No	71%	72%	➡
Restaurant	Yes	58%	59%	➡
	No	42%	41%	➡
On-trade drinkers	Yes	60%	60%	➡
	Yes	60%	60%	➡

Wine purchase in on-trade: by generation

% who buy wine in a bar, pub or restaurant
Base = All Spanish regular wine drinkers (n=1,002)

On-trade location		All Spanish Regular Wine Drinkers (n=1002)	18-24 Gen Z (n=50)	25-39 Millenials (n=203)	40-54 Gen X (n=298)	55+ Boomers (n=451)
Bar or pub	Yes	28%	43%	40%	29%	20%
	No	72%	57%	60%	71%	80%
Restaurant	Yes	59%	80%	78%	63%	45%
	No	41%	21%	22%	37%	55%
On-trade drinkers	Yes	60%	90%	80%	63%	46%
	No	40%	10%	20%	37%	54%

% / %: Statistically significantly higher / lower than all Spanish regular wine drinkers at a 95% confidence level
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '22, (n≥1,002) Spanish regular wine drinkers
*2020 tracking is not available

On-trade consumption frequency

Drinking wine at a party, celebration or big night out has become more frequent among Spain’s wine drinkers

On-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the on-trade

	2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
A relaxing drink out at the end of the day	**3.15**	**3.28**	**3.20**	➡	➡
With an informal meal in a pub / bar / restaurant	**3.20**	**3.14**	**3.03**	➡	➡
With a more formal dinner in a restaurant	**3.29**	**2.95**	**3.00**	➡	➡
At a party / celebration / big night out	**2.44**	**1.79**	**2.15**	➡	⬆

Note: Table above shows the number of days per month that consumers are drinking wine at these occasions

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

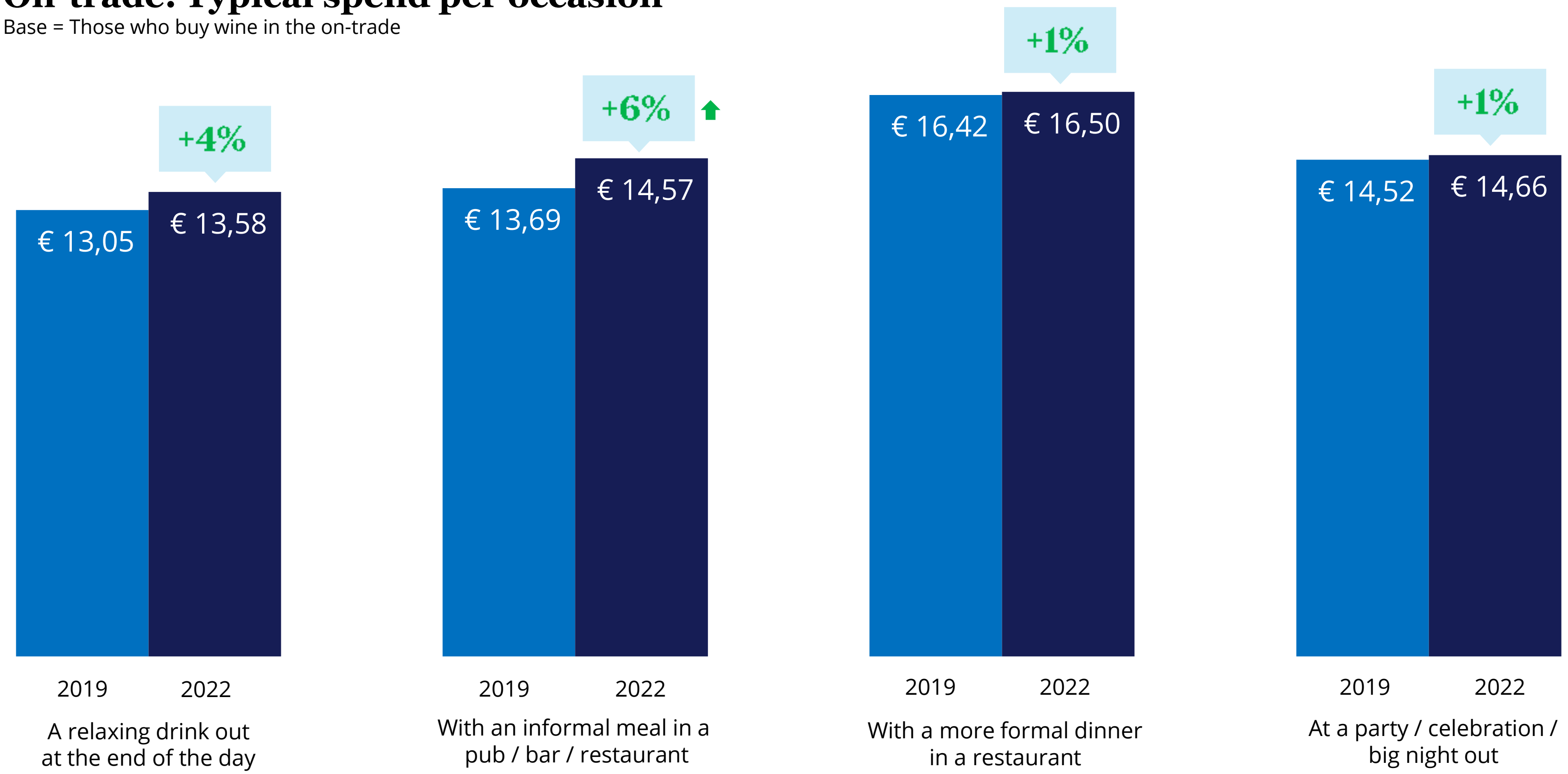
Source: Wine Intelligence, Vinitrac®, Spain, Jul ’19, Oct ‘20, Oct ‘22, (n≥1,002) Spanish regular wine drinkers

Typical on-trade spend

Spanish regular wine drinkers spend more money on wine when going out than in previous years, with spend for an informal meal in a pub, bar or restaurant significantly higher than before

On-trade: Typical spend per occasion

Base = Those who buy wine in the on-trade



⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '22, (n≥1,002) Spanish regular wine drinkers

Wine Views and Attitudes

Spain Wine Landscapes

2023

Attitudes towards wine

Boomers know what they like and stick to it when buying wine, while Gen X and Millennials enjoy new and different wine styles

Attitudes towards wine: Tracking

% who ‘agree’ or ‘strongly agree’ with the following statements
Base = All Spanish regular wine drinkers (n=1,002)

	2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
I enjoy trying new and different styles of wine on a regular basis	58%	56%	53%	↓	→
I don't mind what I buy so long as the price is right	14%	14%	15%	→	→
I know what I like and I tend to stick to what I know	28%	30%	32%	→	→

Attitudes towards wine by generation

% who ‘agree’ or ‘strongly agree’ with the following statements
Base = All Spanish regular wine drinkers (n=1,002)

	All Spanish Regular Wine Drinkers (n=1,002)	18-24 Gen Z (n=50)	25-39 Millenials (n=203)	40-54 Gen X (n=298)	55+ Boomers (n=451)
I enjoy trying new and different styles of wine on a regular basis	53%	56%	68%	63%	40%
I don't mind what I buy so long as the price is right	15%	18%	17%	12%	15%
I know what I like and I tend to stick to what I know	32%	26%	15%	24%	45%

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Jul ’19, Oct ’20, Oct ’22, (n≥1,002) Spanish regular wine drinkers

Wine involvement

Since the pandemic, the level of involvement with the category by Spanish regular wine drinkers has increased significantly

Wine involvement: Tracking

Base = All Spanish regular wine drinkers (n≥1,002)

	2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
High involvement	**39%**	**44%**	**44%**	↑	→
Medium involvement	**41%**	**38%**	**36%**	↓	→
Low involvement	**21%**	**18%**	**20%**	→	→

Wine involvement by generation

Base = All Spanish regular wine drinkers (n=1,002)

	All Spanish Regular Wine Drinkers (n=1,002)	18-24 Gen Z (n=50)	25-39 Millenials (n=203)	40-54 Gen X (n=298)	55+ Boomers (n=451)
High involvement	**44%**	**40%**	**48%**	**44%**	**42%**
Medium involvement	**36%**	**30%**	**35%**	**36%**	**36%**
Low involvement	**20%**	**30%**	**17%**	**20%**	**21%**

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

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

Involvement and perceived expertise (1)

Significantly fewer Spanish regular wine drinkers have a strong interest in wine than at the height of the pandemic; more are buying wines according to their budgets due to inflationary pressure in the economy

Involvement and perceived expertise in wine: Tracking

% who ‘agree’ or ‘strongly agree’ with the following statements
Base = All Spanish regular wine drinkers (n≥1,002)

Ranking '22		2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
1	Drinking wine gives me pleasure	83%	84%	82%	→	→
2	I always look for the best quality wines I can get for my budget	82%	81%	81%	→	→
3	Deciding which wine to buy is an important decision	74%	74%	73%	→	→
4	I like to take my time when I purchase a bottle of wine	56%	59%	59%	→	→
5	I have a strong interest in wine	57%	60%	56%	→	↓
6	Generally speaking, wine is reasonably priced	52%	58%	55%	→	→
7	Wine is important to me in my lifestyle	50%	54%	51%	→	→
8	Compared to others, I know less about the subject of wine	44%	47%	47%	→	→
9	Generally speaking, wine is an expensive drink	27%	30%	33%	↑	→
10	I feel competent about my knowledge of wine	31%	31%	31%	→	→
11	I don’t understand much about wine	29%	29%	30%	→	→

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Jul ’19, Oct ’20, Oct ’22, (n≥1,002) Spanish regular wine drinkers

Involvement and perceived expertise (2)

More Gen Z and Millennials than regular wine drinkers in general are comfortable with current price levels; Millennials are most confident about their wine knowledge

Involvement and perceived expertise in wine by generation

% who 'agree' or 'strongly agree' with the following statements
Base = All Spanish regular wine drinkers (n=1,002)

Ranking '22		All Spanish Regular Wine Drinkers (n=1,002)	18-24 Gen Z (n=50)	25-39 Millenials (n=203)	40-54 Gen X (n=298)	55+ Boomers (n=451)
1	Drinking wine gives me pleasure	82%	71%	80%	81%	84%
2	I always look for the best quality wines I can get for my budget	81%	76%	77%	80%	85%
3	Deciding which wine to buy is an important decision	73%	62%	69%	73%	76%
4	I like to take my time when I purchase a bottle of wine	59%	52%	66%	58%	58%
5	I have a strong interest in wine	56%	54%	63%	55%	54%
6	Generally speaking, wine is reasonably priced	55%	72%	63%	53%	50%
7	Wine is important to me in my lifestyle	51%	46%	53%	52%	51%
8	Compared to others, I know less about the subject of wine	47%	47%	50%	46%	46%
9	Generally speaking, wine is an expensive drink	33%	27%	39%	31%	32%
10	I feel competent about my knowledge of wine	31%	33%	40%	32%	26%
11	I don't understand much about wine	30%	31%	31%	29%	31%

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Oct '22, (n=1,002) Spanish regular wine drinkers

Wine knowledge and confidence

Regular wine drinkers have lower levels of knowledge about wine, with awareness incidences for countries and regions falling; confidence is also decreasing slightly

Wine knowledge index: Tracking

Base = All Spanish regular wine drinkers (n≥1,002)

	2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
Knowledge Index	42.5	40.6	39.9	⬇	➡

Wine knowledge index (0–100) is calculated based on consumer-reported awareness of wine-growing regions and wine brands.
*Wine knowledge index is the 'objective' measurement of consumer knowledge about wine.

-2.6 Index change

Wine confidence index: Tracking

Base = All Spanish regular wine drinkers (n≥1,002)

	2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
Confidence Index	48.2	48.4	48.0	➡	➡

Wine confidence index (0–100) is calculated based on the extent to which consumers feel competent about their wine knowledge. Wine confidence index uses consumers' answers to three attitudinal statements: 1) I feel competent about my knowledge of wine / 2) Compared to others, I know less about the subject of wine / 3) I don't understand much about wine.
**Wine confidence index is the 'subjective' measurement of consumer confidence about their wine knowledge.

-0.2 Index change

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

Wine-drinking motivations

The main reasons people drink wine are to enhance meals and celebrate and share with others; younger age groups feel sophisticated and fashionable when drinking wine, unlike Boomers and Gen X

Wine drinking motivations

% who selected the following as reasons why they drink wine
Base = All Spanish regular wine drinkers (n=1,002)

Ranking '22		All Spanish Regular Wine Drinkers (n=1,002)	18-24 Gen Z (n=50)	25-39 Millenials (n=203)	40-54 Gen X (n=298)	55+ Boomers (n=451)
1	Wine enhances food and meals	58%	40%	43%	55%	68%
2	To celebrate special occasions	57%	66%	52%	53%	61%
3	I really love the taste of wine	56%	54%	50%	55%	60%
4	Wine is about sharing with a partner / close friend or family member	52%	45%	48%	50%	56%
5	Wine is about sharing something with others	45%	44%	34%	41%	52%
6=	Drinking wine can be good for my health	42%	31%	33%	40%	49%
6=	I like learning about new wines	42%	47%	42%	43%	40%
8	Wine helps create a warm / friendly atmosphere	41%	43%	34%	40%	45%
9	Drinking wine makes me feel relaxed	33%	41%	39%	33%	30%
10	I like shopping / choosing wines to drink	30%	19%	26%	30%	33%
11	I treat myself with wine at the end of the day	24%	20%	30%	27%	18%
12	Most of my friends drink wine	19%	22%	19%	12%	22%
13	Wine is a refreshing drink	10%	20%	16%	7%	8%
14	It makes me feel individual and unique	9%	17%	13%	6%	7%
15=	It makes people sophisticated	8%	24%	15%	7%	3%
15=	Wine is a fashionable drink	8%	19%	8%	7%	7%

= Represents equal ranking

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Spain, Oct '22, (n=1,002) Spanish regular wine drinkers

Wine-buying choice cues

Regular wine drinkers choose wine according to brand, origin and the wine's age; promotional offers have grown as a reason to buy a wine in the past few years

Wine choice cues: Tracking

% who indicate each of the following factors is 'important' or 'very important' when buying wine
Base = All Spanish regular wine drinkers (n≥1,002)

Ranking '22		2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
1	A brand I am aware of	85%	84%	84%	➡	➡
2	The region of origin	83%	81%	82%	➡	➡
3	The ageing of the wine	82%	80%	81%	➡	➡
4	The country of origin	81%	81%	79%	➡	➡
5	Wine that matches or complements food	73%	74%	73%	➡	➡
6	Recommendation by friend or family	75%	72%	71%	➡	➡
7	Grape variety	68%	67%	70%	➡	➡
8	Taste or wine style descriptions displayed on the shelves or on wine labels	64%	62%	64%	➡	➡
9	Promotional offer	51%	53%	59%	⬆	⬆
10	Recommendation by wine critic or writer	55%	55%	56%	➡	➡
11	Recommendations from shop staff or shop leaflets	52%	55%	55%	➡	➡
12	Whether or not the wine has won a medal or award	52%	53%	53%	➡	➡
13	Recommendation by wine guide books	50%	50%	49%	➡	➡
14	Alcohol content	46%	46%	48%	➡	➡
15	Whether the wine is Ecologic or not	38%	36%	37%	➡	➡
16	Appeal of the bottle and / or label design	32%	36%	33%	➡	➡
17	Whether or not the wine is low alcohol	29%	31%	28%	➡	➡

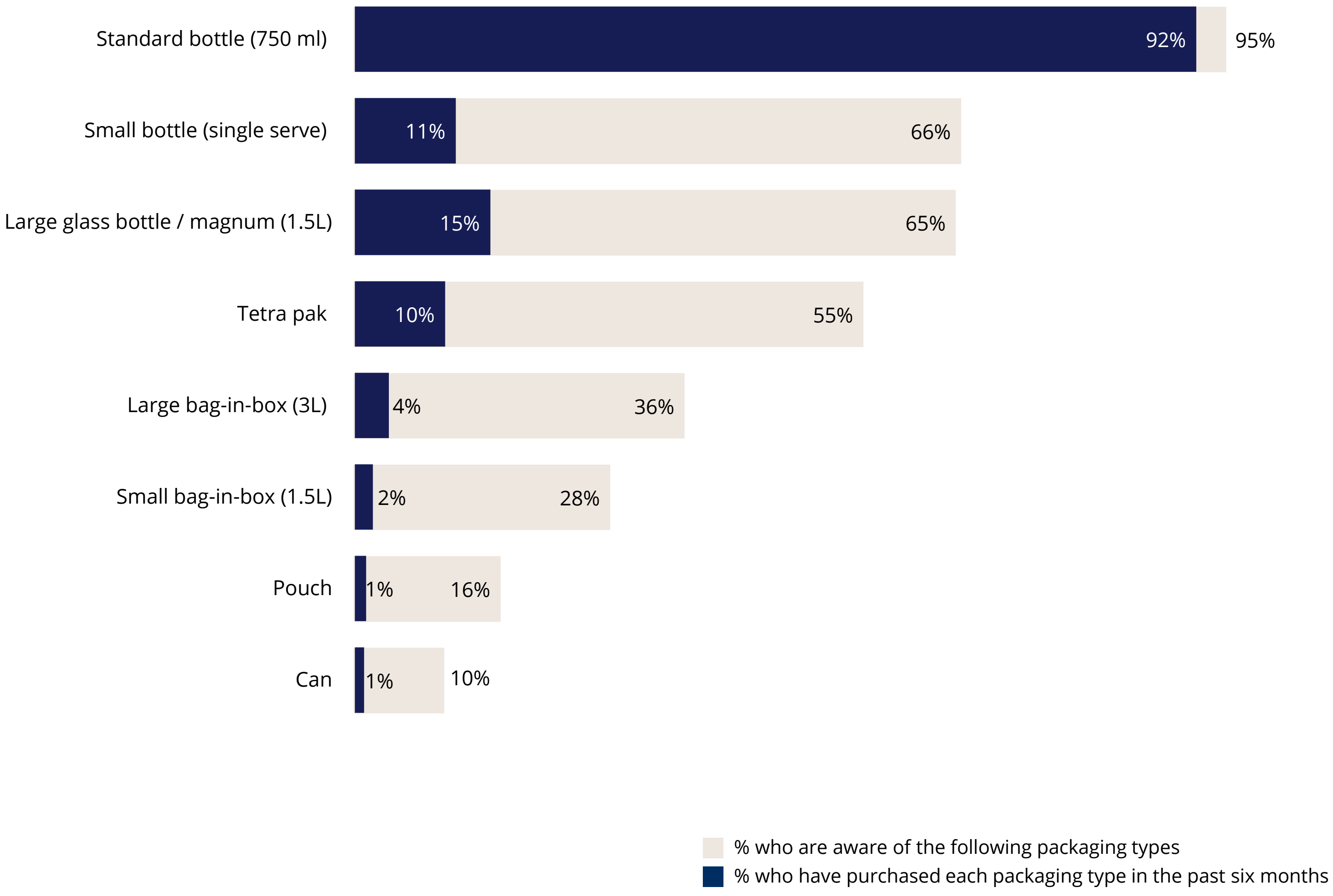
= Represents equal ranking
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

Packaging type consumption and awareness

The standard 75cl bottle is the most widely known and purchased type of wine packaging in the Spanish market

Packaging types: Awareness and consumption levels

% of those who are aware of or have purchased wine in the following packaging types
Base = All Spanish regular wine drinkers (n=1,002)



Source: Wine Intelligence, Vinitrac® Spain, Oct '22, (n≥1,002) Spanish regular wine drinkers

Packaging purchase

Younger age groups are willing to try different packaging, while older wine drinkers stick to standard bottles. Purchases of standard and small bottles have increased in recent years

Packaging purchase: Tracking

% who have purchased wine in the following packaging types
Base = All Spanish regular wine drinkers (n=1,002)

Ranking '22		2020 (n=561)	2022 (n=1,002)	Tracking vs. '20
1	Standard bottle (750 ml)	**86%**	**92%**	⬆
2	Large glass bottle / magnum (1.5L)	**n/a**	**15%**	n/a
3	Small bottle (single serve)	**6%**	**11%**	⬆
4	Tetra pak	**9%**	**10%**	➡
5	Large bag-in-box (3L)	**6%**	**4%**	⬇
6	Small bag-in-box (1.5L)	**n/a**	**2%**	n/a
7=	Can	**1%**	**1%**	➡
7=	Pouch	**n/a**	**1%**	n/a

Packaging purchase: by generation

% who have purchased wine in the following packaging types
Base = All Spanish regular wine drinkers (n=1,002)

Ranking '22		All Spanish Regular Wine Drinkers (n=1,002)	18-24 Gen Z (n=50)	25-39 Millenials (n=203)	40-54 Gen X (n=298)	55+ Boomers (n=451)
1	Standard bottle (750 ml)	**92%**	**86%**	**84%**	**93%**	**95%**
2	Large glass bottle / magnum (1.5L)	**15%**	**26%**	**29%**	**13%**	**8%**
3	Small bottle (single serve)	**11%**	**24%**	**13%**	**11%**	**9%**
4	Tetra pak	**10%**	**23%**	**14%**	**8%**	**8%**
5	Large bag-in-box (3L)	**4%**	**6%**	**4%**	**3%**	**4%**
6	Small bag-in-box (1.5L)	**2%**	**13%**	**3%**	**1%**	**1%**
7=	Can	**1%**	**3%**	**4%**	**1%**	**0%**
7=	Pouch	**1%**	**11%**	**2%**	**1%**	**0%**

= Represents equal ranking

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac® Spain, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

Brand Health

Spain Wine Landscapes

2023

Global Wine Brand Power Index

Brand health measures included in the index

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	**Brand purchase index**
Conversion	% who have bought each brand in the past 3 months Base = Those who have heard of each brand	
Consideration	% who would consider buying each brand Base = Those who have heard of each brand	
Affinity	% who think each brand is right for people like them Base = Those who have heard of each brand	**Brand connection index**
Recommendation	% who would recommend each brand to a friend Base = Those who have heard of each brand	

Wine Brand Power Index

Spain Brand Power

Protos holds on to its top spot in the 2023 Brand Power Index, followed by Cune, Ramón Bilbao and Marqués de Cáceres

Protos — 1st

Cune — 2nd

Marqués de Cáceres, Ramón Bilbao — =3rd

Spanish Brand Power Index

Protos continues to be the most impactful brand within the Spanish wine market

Spanish Brand Power Index

The top 30 most powerful wine brands in the Spanish market based on consumer feedback from six key brand health measures
Base = All Spanish regular wine drinkers (n=1,002)

Notes: Brand Power Index score based on October 2022 data

Ranking '22		Final Index	Tracking vs 2022	Score difference vs 2022
1	Protos	90.3	=	0.3
2	Cune	84.0	=	-1.9
3=	Ramón Bilbao	81.7	+1	-0.5
3=	Marqués de Cáceres	81.7	-1	-2.6
5	Marqués de Riscal	67.6	=	-4.6
6	Vega Sicilia	62.1	+1	-3.3
7	Viña Albali	61.3	+2	-2.0
8	Muga	61.2	-2	-4.9
9	Faustino	61.1	-1	-4.1
10	Sangre de Toro	60.9	=	-1.6
11	Don Simon	60.6	+5	2.6
12	Pago de Carraovejas	60.3	+5	3.1
13	Martín Códax	57.6	-2	-4.2
14	Torres	57.0	-1	-3.9
15	Campo Viejo	56.7	=	-1.7

Ranking '22		Final Index	Tracking vs 2022	Score difference vs 2022
16	Tinto Pesquera	56.0	n/a	n/a
17	Pata Negra	55.5	-5	-6.2
18	Emilio Moro	54.9	+5	2.1
19	Marqués de Griñón	53.1	+3	-0.7
20	El Coto	52.7	-1	-1.6
21	Tio Pepe	52.0	-1	-2.3
22	Marqués de Murrieta	50.8	-4	-5.3
23	Enate	50.2	+2	-0.8
24	Beronia	48.6	+3	-0.6
25	Peñascal	48.3	-4	-5.9
26	Raimat	47.5	=	-2.0
27	Mar de Frades	46.8	+2	-0.1
28	Diamante	46.0	-4	-5.5
29	Viñas del Vero	45.2	-1	-3.1
30	Paco & Lola	45.1	+18	6.5

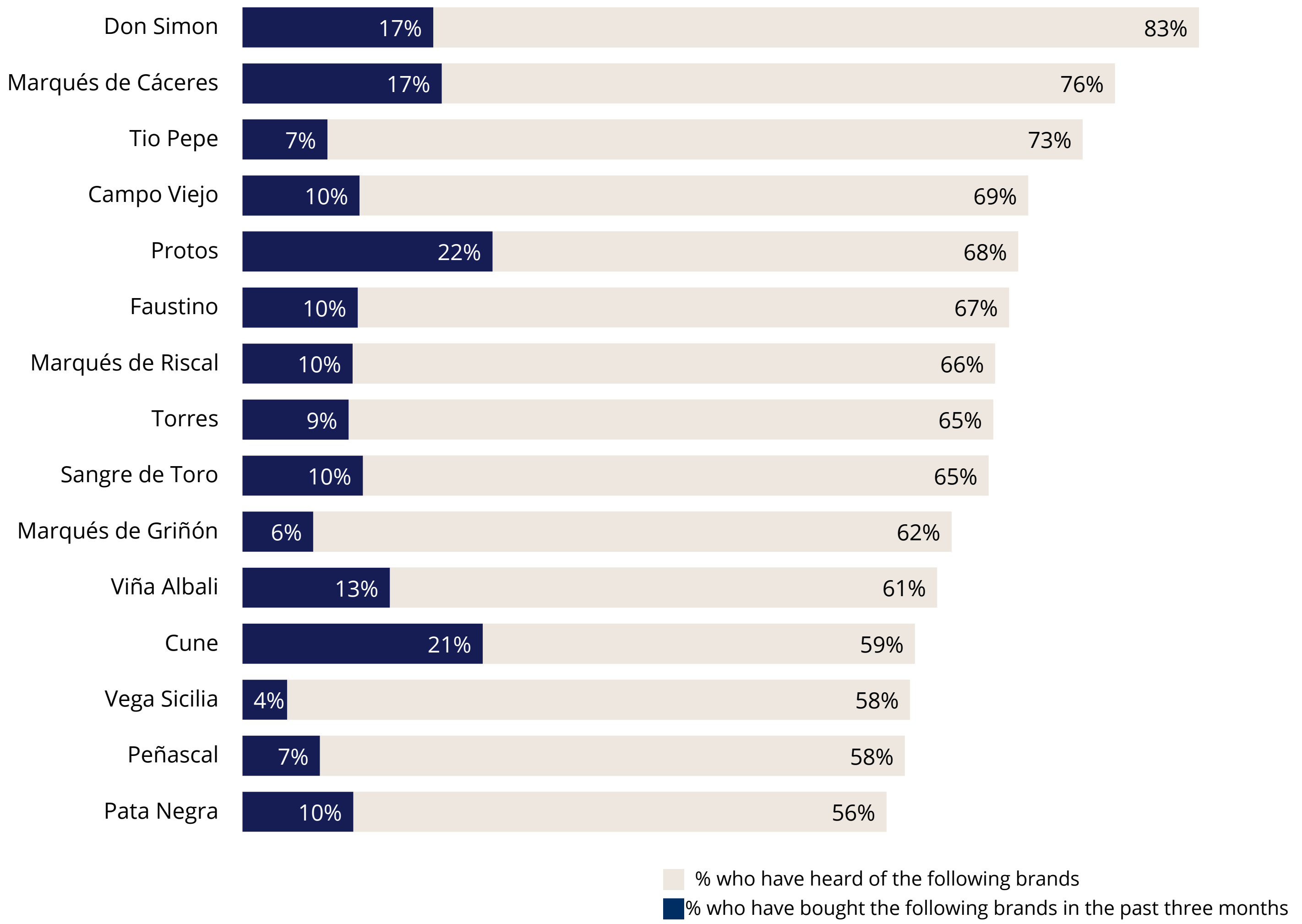
Source: Wine Intelligence, Vinitrac®, Spain, Oct '22, (n=1,002) Spanish regular wine drinkers

Brand health: Consumption and awareness

While Don Simón and Marqués de Cáceres are the most well-known brands in Spain, Protos and Cune are the most widely consumed in the Spanish market

Brand health: Top 15 awareness and consumption levels

Base = All Spanish regular wine drinkers (n=1,002)



Source: Wine Intelligence, Vinitrac®, Spain, Oct ‘22, (n=1,002) Spanish regular wine drinkers

Brand awareness: Tracking

Don Simón has remained the most well-known brand in Spain for several years; Viña Albali, Cune, Ramón Bilbao and others have grown in awareness

Awareness: Tracking

% who have heard of the following brands
Base = All Spanish regular wine drinkers (n≥1,002)

Ranking '22		2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
1	Don Simon	86%	85%	83%	→	→
2	Marqués de Cáceres	77%	75%	76%	→	→
3	Tio Pepe	79%	77%	73%	↓	→
4	Campo Viejo	75%	72%	69%	↓	→
5	Protos	66%	66%	68%	→	→
6	Faustino	67%	67%	67%	→	→
7	Marqués de Riscal	67%	65%	66%	→	→
8=	Torres	70%	65%	65%	↓	→
8=	Sangre de Toro	66%	65%	65%	→	→
10	Marqués de Griñón	65%	62%	62%	→	→
11	Viña Albali	57%	56%	61%	→	↑
12	Cune	55%	54%	59%	→	↑
13=	Vega Sicilia	67%	59%	58%	↓	→
13=	Peñascal	62%	59%	58%	↓	→
15	Pata Negra	53%	55%	56%	→	→
16	Ramón Bilbao	47%	47%	52%	↑	↑
17	El Coto	47%	45%	49%	→	→
18	Siglo	51%	46%	48%	→	→
19	Marqués de Murrieta	52%	46%	47%	↓	→
20	Mateus	41%	38%	43%	→	↑
21	Berberana	47%	41%	42%	↓	→
22=	Osborne	41%	40%	41%	→	→
22=	Viña Sol	36%	35%	41%	↑	↑
24=	Diamante	45%	39%	39%	↓	→
24=	Viña Pomal	41%	37%	39%	→	→
24=	Federico Paternina	46%	40%	39%	↓	→
27	Señorio de los Llanos	37%	38%	38%	→	→
28	Muga	40%	36%	37%	→	→
29	Tinto Pesquera	40%	36%	36%	↓	→
30	Antaño	34%	29%	34%	→	↑

Results for all brands available in the data table

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

Brand purchase: Tracking

The top brands have remained stable over the years with Protos and Cune leading in purchase

Purchase: Tracking

% who have bought the following brands in the past three months
Base = All Spanish regular wine drinkers (n≥1,002)

Ranking '22		2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
1	Protos	20%	22%	22%	→	→
2	Cune	20%	20%	21%	→	→
3	Ramón Bilbao	18%	17%	18%	→	→
4=	Marqués de Cáceres	17%	21%	17%	→	→
4=	Don Simon	15%	15%	17%	→	→
6	Viña Albali	13%	14%	13%	→	→
7=	Sangre de Toro	9%	10%	10%	→	→
7=	Campo Viejo	13%	13%	10%	→	→
7=	Faustino	8%	13%	10%	→	↓
7=	Pata Negra	9%	11%	10%	→	→
7=	Marqués de Riscal	10%	11%	10%	→	→
12	Torres	11%	8%	9%	→	→
13	Martín Códax	9%	7%	8%	→	→
14=	Tio Pepe	8%	8%	7%	→	→
14=	El Coto	9%	7%	7%	→	→

Ranking '22		2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
14=	Diamante	8%	8%	7%	→	→
14=	Peñascal	8%	9%	7%	→	↓
18=	Raimat	3%	5%	6%	↑	→
18=	Emilio Moro	4%	4%	6%	↑	↑
18=	Viñas del Vero	6%	5%	6%	→	→
18=	Marqués de Griñón	4%	5%	6%	→	→
18=	Los Molinos	n/a	n/a	6%	n/a	n/a
18=	Beronia	7%	4%	6%	→	→
18=	Muga	7%	6%	6%	→	→
18=	Mateus	4%	6%	6%	→	→
18=	Yllera	5%	5%	6%	→	→
27=	Viña Sol	4%	5%	5%	→	→
27=	Enate	6%	4%	5%	→	→
27=	Tinto Pesquera	8%	6%	5%	↓	→
27=	Viña Pomal	4%	4%	5%	→	→

Results for all brands available in the data table

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

Brand conversion: Tracking

Conversion for Marqués de Cáceres has decreased since 2020

Conversion: Tracking

% who have bought the following brands in the past three months
Base = Those who have heard of each brand

Ranking '22		2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
1	Cune	35%	37%	36%	→	→
2	Ramón Bilbao	37%	37%	35%	→	→
3	Protos	31%	33%	32%	→	→
4	Martín Códax	32%	25%	28%	→	→
5	Paco & Lola	26%	28%	26%	→	→
6	El Perro Verde	27%	26%	24%	→	→
7	Marqués de Cáceres	22%	27%	23%	→	↓
8=	Emilio Moro	18%	16%	22%	→	→
8=	Viñas del Vero	24%	20%	22%	→	→
10=	Pago de Carraovejas	n/a	n/a	21%	n/a	n/a
10=	Viña Albali	23%	25%	21%	→	→
10=	Cuatro Rayas	25%	20%	21%	→	→
13=	Raimat	11%	16%	20%	↑	→
13=	Don Simon	18%	18%	20%	→	→
15=	Los Molinos	n/a	n/a	19%	n/a	n/a

Ranking '22		2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
15=	Beronia	24%	16%	19%	→	→
15=	Yellow Tail	5%	13%	19%	→	→
18=	Diamante	17%	20%	18%	→	→
18=	Enate	20%	14%	18%	→	→
18=	Mar de Frades	17%	17%	18%	→	→
21=	Camins del Priorat	23%	14%	17%	→	→
21=	Yllera 5.5	25%	22%	17%	↓	→
21=	Canasta	22%	22%	17%	→	→
21=	Pata Negra	16%	20%	17%	→	→
21=	Yllera	15%	17%	17%	→	→
26=	Aalto	16%	8%	16%	→	→
26=	Sangre de Toro	14%	15%	16%	→	→
26=	Celeste	19%	23%	16%	→	→
29=	Muga	17%	16%	15%	→	→
29=	Viña Esmeralda	16%	17%	15%	→	→

Results for all brands available in the data table

= Represents equal ranking
Grey shading: low sample size (n<50)
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

Brand consideration: Tracking

Camins del Priorat and Aalto are being considered more by Spanish regular wine drinkers

Consideration: Tracking

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

Ranking '22		2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking 2019	Tracking vs. '20
1	Pago de Carraovejas	n/a	n/a	57%	n/a	n/a
2=	Cune	54%	58%	54%	→	→
2=	Protos	57%	59%	54%	→	→
4=	Muga	49%	53%	53%	→	→
4=	Ramón Bilbao	56%	57%	53%	→	→
6	Camins del Priorat	46%	37%	52%	→	↑
7=	Martín Códax	49%	46%	49%	→	→
7=	Aalto	33%	26%	49%	→	↑
9=	Tinto Pesquera	48%	47%	48%	→	→
9=	Paco & Lola	44%	47%	48%	→	→
11	Emilio Moro	47%	39%	47%	→	→
12	Marqués de Cáceres	44%	50%	46%	→	→
13	Abadía Retuerta	31%	32%	43%	↑	→
14=	Enate	43%	35%	41%	→	→
14=	Pétalos	47%	39%	41%	→	→

Ranking '22		2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking 2019	Tracking vs. '20
14=	Mar de Frades	36%	42%	41%	→	→
17=	Beronia	41%	42%	40%	→	→
17=	Marqués de Riscal	40%	43%	40%	→	→
17=	El Perro Verde	49%	39%	40%	→	→
20=	Vega Sicilia	37%	38%	38%	→	→
20=	Pingus	41%	34%	38%	→	→
22	Pazo Señorans	39%	39%	37%	→	→
23=	Viña Albali	31%	36%	36%	→	→
23=	Marqués de Murrieta	36%	39%	36%	→	→
25=	Cuatro Rayas	47%	42%	35%	↓	→
25=	LAN	29%	31%	35%	→	→
27=	Canasta	31%	33%	34%	→	→
27=	Arzuaga	32%	28%	34%	→	→
27=	Raimat	36%	31%	34%	→	→
27=	Viñas del Vero	35%	38%	34%	→	→

Results for all brands available in the data table

= Represents equal ranking
Grey shading: low sample size (n<50)
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

Brand affinity: Tracking

Affinity for wine brands in Spain has remained stable over recent years; regular wine drinkers feel that Pago de Carraovejas, Ramón Bilbao and Protos are right for people like them

Affinity: Tracking

% who think the following brands are right for people like them
Base = Those who have heard of each brand

Ranking '22		2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking 2019	Tracking vs. '20
1	Pago de Carraovejas	n/a	n/a	55%	n/a	n/a
2	Ramón Bilbao	54%	54%	54%	➡	➡
3	Protos	55%	54%	53%	➡	➡
4	Cune	49%	54%	50%	➡	➡
5	Muga	51%	50%	47%	➡	➡
6	Martín Códax	46%	51%	46%	➡	➡
7=	Paco & Lola	48%	49%	45%	➡	➡
7=	Emilio Moro	42%	41%	45%	➡	➡
7=	Aalto	29%	27%	45%	➡	➡
10=	Tinto Pesquera	48%	44%	44%	➡	➡
10=	Marqués de Cáceres	40%	46%	44%	➡	➡
12	Camins del Priorat	44%	43%	43%	➡	➡
13=	El Perro Verde	40%	34%	41%	➡	➡
13=	Vega Sicilia	36%	39%	41%	➡	➡
15=	Pazo Señorans	41%	37%	40%	➡	➡

Ranking '22		2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking 2019	Tracking vs. '20
15=	Enate	39%	31%	40%	➡	⬆
15=	Pingus	37%	37%	40%	➡	➡
18	Marqués de Riscal	39%	41%	39%	➡	➡
19	Mar de Frades	38%	35%	38%	➡	➡
20	Raimat	30%	30%	37%	➡	➡
21	Yellow Tail	28%	23%	36%	➡	➡
22	Beronia	38%	36%	35%	➡	➡
23=	Yllera 5.5	38%	31%	34%	➡	➡
23=	Viñas del Vero	34%	30%	34%	➡	➡
23=	Belondrade y Lurton	30%	36%	34%	➡	➡
26=	Pétalos	40%	32%	33%	➡	➡
26=	Yllera	32%	29%	33%	➡	➡
26=	Marqués de Murrieta	34%	38%	33%	➡	➡
29	El Coto	33%	33%	32%	➡	➡
30	Viña Esmeralda	31%	34%	31%	➡	➡

Results for all brands available in the data table

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n/a = tracking unavailable for this wave
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

Brand recommendation: Tracking

Over half of Spanish wine drinkers would recommend Pago de Carraovejas, Ramón Bilbao and Protos to their friends

Recommendation: Tracking

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

Ranking '22		2019 (n=1,073)	2020 (n=1,122)	2022 (n=1,002)	Tracking vs. '19	Tracking vs. '20
1	Pago de Carraovejas	n/a	n/a	57%	n/a	n/a
2	Ramón Bilbao	51%	49%	52%	→	→
3	Protos	56%	54%	51%	→	→
4	Vega Sicilia	45%	48%	50%	↑	→
5	Muga	50%	43%	48%	→	→
6	Cune	47%	44%	45%	→	→
7	Aalto	31%	26%	43%	→	→
8=	Emilio Moro	42%	38%	41%	→	→
8=	Tinto Pesquera	49%	45%	41%	↓	→
10=	Marqués de Cáceres	36%	43%	40%	→	→
10=	Camins del Priorat	35%	26%	40%	→	→
12=	Martín Códax	43%	45%	39%	→	→
12=	Marqués de Riscal	39%	42%	39%	→	→
14	Paco & Lola	37%	42%	37%	→	→
15=	Pingus	44%	38%	36%	→	→
15=	Enate	34%	25%	36%	→	↑
17=	Pétalos	34%	30%	35%	→	→
17=	Mar de Frades	32%	33%	35%	→	→
19	Marqués de Murrieta	33%	31%	34%	→	→
20	Belondrade y Lurton	42%	24%	33%	→	→
21=	Beronia	35%	29%	31%	→	→
21=	El Perro Verde	27%	29%	31%	→	→
21=	Abadía Retuerta	35%	30%	31%	→	→
24	LAN	21%	21%	30%	↑	↑
25=	El Coto	30%	28%	29%	→	→
25=	Raimat	25%	27%	29%	→	→
25=	Arzuaga	30%	22%	29%	→	→
28=	Sangre de Toro	22%	25%	28%	↑	→
28=	Viñas del Vero	29%	29%	28%	→	→
30	Pazo Señorans	38%	32%	27%	→	→

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Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

Research Methodology

Spain Wine Landscapes

2023

Research methodology

QUANTITATIVE

Data was collected in Spain since October 2018.

The July 2019 and October 2020 waves were tracked against October 2022.

Respondents were screened to ensure that they: were at least 18 years old; drank red, white or rosé wine at least once a month; and bought 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.

*Please note that additional gender categories were also surveyed. These categories fell naturally in the sample and were not enforced via quotas

		Oct-18	Jul-19	Oct-20	Oct-22
	n=	1,000	1,073	1,122	1,002
Gender*	Male	50%	50%	50%	49%
	Female	50%	50%	50%	51%
	Total	***100%***	***100%***	***100%***	***100%***
Age	18-24	7%	7%	7%	5%
	25-34	16%	16%	16%	12%
	35-44	18%	18%	18%	18%
	45-54	20%	20%	20%	20%
	55-64	14%	14%	14%	18%
	65 and over	*26%*	*26%*	*26%*	*27%*
	Total	***100%***	***100%***	***100%***	***100%***
Region	Madrid	n/a	n/a	n/a	15%
	Centro	n/a	n/a	n/a	9%
	Norte-Centro	n/a	n/a	n/a	9%
	Noroeste	n/a	n/a	n/a	8%
	Noreste	n/a	n/a	n/a	23%
	Levante	n/a	n/a	n/a	14%
	Sur	n/a	n/a	n/a	18%
	Canarias	n/a	n/a	n/a	5%
	Total	***n/a***	***n/a***	***n/a***	***100%***

Source: Wine Intelligence, Vinitrac®, Spain, Jul '19, Oct '20, Oct '22, (n≥1,002) Spanish regular wine drinkers

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