Part I of Wine Lister's annual in-depth Bordeaux study draws upon the results of our latest trade survey of key fine wine industry players from across the globe. It highlights the right bank and better storytelling as potential lands of promise for the region.

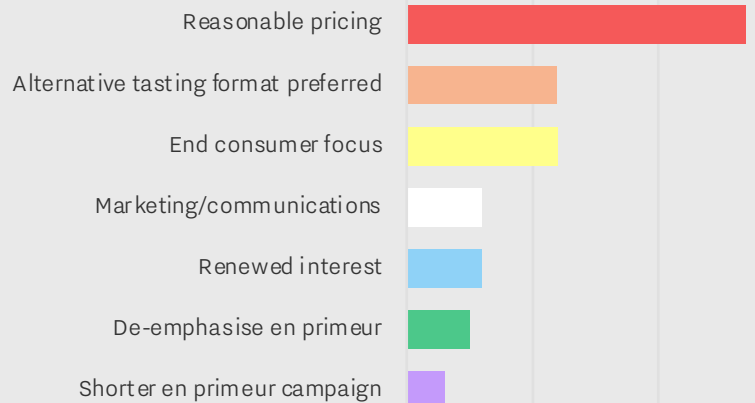Read more: www.wine-lister.com/analysis

Two-year popularity progression by region

Legend: WL Bordeaux, WL Burgundy, WL California, WL Piedmont, WL Spain, WL Tuscany
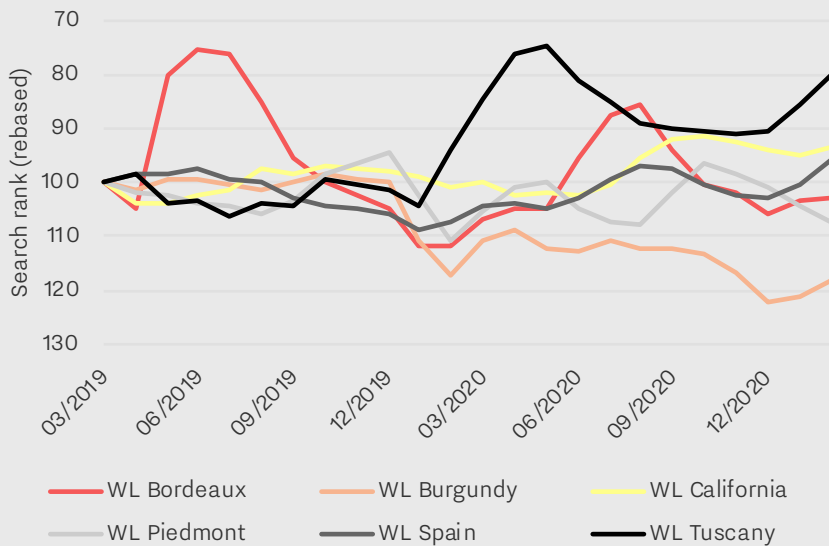
While Bordeaux remains the singular most-searched-for region on Wine-Searcher in the world, its popularity progression continues to depend on peaks and troughs between en primeur campaigns. Following a large spike in mid-2019 (resultant of the 2018 vintage campaign), a less pronounced spike appears during the more condensed 2019 vintage campaign. By contrast, Tuscany shows a marked search increase at the start of the coronavirus pandemic, and continues this popularity trend into 2021.

The majority of the trade acknowledge the biggest success of the 2019 campaign to be its approach to pricing in light of the pandemic, with its members noting that châteaux who provided the most "reasonable" pricing have been the most successful. Many respondents also reflected positively on the remote tasting format necessitated by travel restrictions, and the increased focus on the end consumer resulting from a distanced en primeur campaign.

Top must-dos coming out of the 2019 en primeur campaign

- Reasonable pricing
- Alternative tasting format preferred
- End consumer focus
- Marketing/communications
- Renewed interest
- De-emphasise en primeur
- Shorter en primeur campaign

Top confidence increases by producer

- 1.0 Troplong-Mondot
- 0.8 Valandraud
- 0.8 Langoa Barton
- 0.7 La Mondotte
- 0.6 Pédesclaux
- 0.5 Calon Ségur
- 0.5 Cheval Blanc Le Petit Cheval
- 0.5 l'Eglise Clinet

Survey results indicate that confidence in Bordeaux is decreasing, with more than three times as many wines losing confidence ratings by a significant margin as those gained (compared to our Burgundy study in December 2020, in which the majority of producers gained confidence). Eight wines have increased their confidence scores by a significant degree, shown left. Troplong-Mondot leads the pack in most-improved confidence since our last Bordeaux survey (up one point since spring of 2020), while Valandraud, Langoa Barton, and Mondotte likewise have made notable strides over the past year, up 0.8, 0.8, and 0.7 points, respectively.