

# Report Brochure



## NORDICS WINE MARKET LANDSCAPES



FINLAND, NORWAY AND SWEDEN

MARCH 2014



REPORT PRICE: • GBP 2,500 or 5 Report Credits



- Finnish wine market
  - Still light wine by country of origin
  - Sparkling wine volume by country of origin
  - Fortified wine volume by country of origin
- Finnish wine consumers
  - Overview of the Finland wine market
  - Demographics: gender, age, region and income
  - Wine consumption frequency
- Beverage repertoire
  - Alcoholic beverage repertoire
  - Proportions of red, white and rosé wine
  - Country of origin consumption
  - Region of origin awareness, purchase and conversion
- Wine buying behaviour
  - Channel usage when buying wine
  - Choice cues when buying wine
- Wine consumption in the off-trade and on-trade
  - Off-trade consumption frequency by occasion
  - Spend by occasion in the off-trade
  - Wine consumption in the on-trade
  - On-trade consumption frequency by occasion
  - Spend by occasion in the on-trade
- Wine involvement
  - Wine involvement
  - Involvement, value and perceived expertise
  - Wine attitude
  - Attitudes to closures
  - Packaging types purchase
- Brand health
  - Brand awareness
  - Brand purchase
  - Brand conversion

# Norway



- Norwegian wine market
  - Still light wine by country of origin
  - Sparkling wine volume by country of origin
  - Fortified wine volume by country of origin
- Norwegian wine consumers
  - Overview of the Norway wine market
  - Demographics: gender, age, region and income
  - Wine consumption frequency
- Beverage repertoire
  - Alcoholic beverage repertoire
  - Proportions of red, white and rosé wine
  - Country of origin consumption
  - Region of origin awareness, purchase and conversion
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  - Brand awareness
  - Brand purchase
  - Brand conversion

# Sweden



- Swedish wine market
    - Still light wine by country of origin
    - Sparkling wine volume by country of origin
    - Fortified wine volume by country of origin
  - Swedish wine consumers
    - Overview of the Sweden wine market
    - Demographics: gender, age, region and income
    - Wine consumption frequency
  - Beverage repertoire
    - Alcoholic beverage repertoire
    - Proportions of red, white and rosé wine
    - Country of origin consumption
    - Region of origin awareness, purchase and conversion
  - Wine buying behaviour
    - Channel usage when buying wine
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- Wine consumption in the off-trade and on-trade
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    - Spend by occasion in the off-trade
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    - On-trade consumption frequency by occasion
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  - Wine involvement
    - Wine involvement
    - Involvement, value and perceived expertise
    - Wine attitude
    - Attitudes to closures
    - Packaging types purchase
  - Brand health
    - Brand awareness
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 5

### Proportions of red, white and rosé wine

Red wine remains the dominant type of wine

**Proportions of red, white, and rosé wine**  
% of total wine consumption  
 Base=All Norwegian regular wine drinkers (n=560)

No significant difference between Jan'12 and Oct'13  
Source: Wine Intelligence, Vinitrac® Norway, Oct'13, n=560, Jan'12, n=607 Norwegian reg

### Management summary – Finland

- Consumption of white wine and rosé wine has seen an increase while red wine consumption remains the same
- Consumers have become less aware of major wine regions and brands
- Country of origin and region of origin have also become less important choice cues when they buy wine
- Alko remains the dominant wine buying channel in Finland, although more consumers buy wine from Estonia and through Duty Free

\* shown in brackets: data in Feb'11  
 \* Statistically significantly higher than Feb'11 at a 95% confidence level  
 \* Statistically significantly lower than Feb'11 at a 95% confidence level  
 Source: Wine Intelligence, Vinitrac® Finland, Oct'13, n=561, Feb'11, n=1,024 Finnish regular wine drinkers

162 page  
 PowerPoint  
 report

Price also includes  
 supporting  
 data in Excel  
 (All Vinitrac® questions  
 with cross-tabulations by  
 gender, age groups,  
 Danish regions, income  
 and wine purchasing  
 channels)

# Excerpts from the introduction



“There are 10 million reasons for the wine industry to turn its attention to the Nordic countries – or, more specifically, 10 million regular wine drinkers to target.”

“It’s a part of the world associated with wealth, easy-going people, and broad mindedness. From a wine marketer’s point of view, what’s not to like?”

“This report makes it clear – if it needed clarifying – that we are dealing with three separate countries here, not one northern super-state, and although the vinous landscape does not vary wildly from nation to nation, each territory has its own characteristics and quirks.”

“If there is one unifying theme, it is perhaps that we can’t take the Nordics for granted. The Swedes, Finns and Norwegians are not contractually obliged to maintain their love affair with wine. From time to time, they need reminders of what makes wine special, and younger drinkers need to be recruited to replace those who drop out of the market.”

“Is the wine industry currently doing enough to engage and enthuse Nordic consumers? The export and marketing directors of the wineries supplying the region might well argue that they are. But the people who matter most – the consumers who buy wine in Sweden, Finland and Norway – are telling a slightly different story.”



Graham Holter  
Associate Director -  
Publishing  
Wine Intelligence

March 2014

- Measures from the IWSR correspond to actual wine consumption figures. This means sales into the trade (on + off premise)
- The IWSR visits each market each year. Discussions are held with key local experts in the market including importers, producers, grey market operators, duty free operators, and supermarket/hypermarket buyers.
- All volume data is given in thousand 9 Litre Cases
- In the breakdown by country of origin, IWSR includes (depending on the market and the size of the category) the following two categories: 'Other' and 'International'  
They are defined as followed:
  - 'Other': category including wine blends (normally in bulk or bottled without specified country of origin) and wines from other countries with volumes too small to break out separately
  - 'International': Category including wine brands that have wines from various countries
- The IWSR includes the following types of wine in its definition of 'wine':

### Definitions

#### WINE =

Still light wine +  
Sparkling (Champagne & other) +  
Fortified +  
Light aperitifs (vermouth...) +  
Other (rice wines...)

} Sub-categories

### SAMPLE SIZES

At least 500 respondents per survey; 1,000 in most countries, 2,000 in US  
Regular adult wine drinkers (where 'regular' = drinks wine at least once per month)

Each Vinitrac® survey starts with questions to screen respondents:

- Adult drinking age within each country
- Permanent resident of the country being surveyed
- Drinks wine at least once per month
- Drinks at least red, white or rosé wine
- Buys wine in the off-premise and/or in the on-premise channels

... and rejects all respondents who do not fulfil these Vinitrac® criteria



Each sample is representative of the 'regular' wine drinking population in that market and is therefore valid; a sample size of at least 500 consumers ensures results are reliable. It's like a 'smaller' version of the wine drinking population at large

### WHY IS VINITRAC® NOT A PANEL?

- Panels are good for monitoring detailed purchase activity but require regular input from exactly the same complete group of respondents
- This requires more time from respondents, for which they are paid, and panels are therefore more heavily skewed towards home-based consumers, e.g. students and home-makers
- This group of a country's wine-drinking population does not fully represent the accurate weighted sample of adult regular wine drinkers on which Vinitrac® insights are based

### HOW DOES VINITRAC® WORK?

- Invitations to participate in Vinitrac® are distributed to adult consumers in each market
- Consumers interested in a wine survey are directed to an URL address, which welcomes them to the online survey
- Wine Intelligence monitors incoming completed responses to build a sample representative of the wine drinking population of the target market
- When a representative sample of at least 1,000 (US: 2,000) is logged, the survey is closed

- The data for this study was collected in February 2011, January 2012, and October 2013
- Data was gathered via Wine Intelligence's Vinitrac<sup>®</sup> online survey:
  - 1,024 Finnish regular wine drinkers in 2011
  - 629 Finnish regular wine drinkers in 2012
  - 561 Finnish regular wine drinkers in 2013
- Respondents were screened to ensure that they drink wine at least once per month; drink red, white or rosé wine; and buy wine in the off-trade and/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 2011, 2012 and 2013 data are representative of Finnish regular wine drinkers in terms of age and gender



- The data for this study was collected in January 2012 and October 2013
- Data was gathered via Wine Intelligence's Vinitrac<sup>®</sup> online survey:
  - 607 Norwegian regular wine drinkers in 2012
  - 560 Norwegian regular wine drinkers in 2013
- Respondents were screened to ensure that they drink wine at least once per month; drink red, white or rosé wine; and buy wine in the off-trade and/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 2012 and 2013 data are representative of Norwegian regular wine drinkers in terms of age and gender



- The data for this study was collected in February 2011, January 2012, and October 2013
- Data was gathered via Wine Intelligence's Vinitrac® online survey:
  - 1,002 Swedish regular wine drinkers in 2011
  - 1,000 Swedish regular wine drinkers in 2012
  - 549 Swedish regular wine drinkers in 2013
- Respondents were screened to ensure that they drink wine at least once per month; drink red, white or rosé wine; and buy wine in the off-trade and/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 2011, 2012 and 2013 data are representative of Swedish regular wine drinkers in terms of age and gender



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