

NETHERLANDS LANDSCAPES

May 2018 Report

wine
intelligence

The Netherlands Landscapes 2018

Report overview



Report price:

GBP 2,500
USD 3,500
AUD 4,500
EUR 3,000

5
report
credits

The Netherlands Landscapes 2018 report includes:

- Report with the latest information regarding the Dutch wine market, supported by:
 - Wine Intelligence Vinitrac®
 - Wine Intelligence market experience
 - Secondary sources
 - Trade interviews
- User-friendly data table with all the measures from Vinitrac® showing significances, cross tabbed with:
 - All Dutch regular wine drinkers in 2018
 - Gender groups
 - Age groups
 - Regions
- Tracking data vs. 2014 and 2017
- Hot topic: Alternative types of wine

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Management summary

Key trends in the Dutch wine market

1. WINE VOLUMES ARE STARTING TO DECLINE

- Craft beer, gin and cocktails growing in popularity with wine drinkers
- Decline in the proportion of wine drinkers who consume white and rosé wine
- Health issues and negative press about the effects of alcohol causing consumers to moderate alcohol consumption

2. CONSUMERS ARE MORE DRIVEN BY PRICE THAN BRAND LOYALTY

- Exclusivity deals in supermarkets mean consumers are driven by what is available where they shop and strong supermarket own label brands, which have the highest conversion rates amongst all brands
- Dutch wine drinkers are price, rather than brand driven

3. FOOD MATCHING BECOMES INCREASINGLY POPULAR AS CONSUMERS MAKE WINE PART OF CULINARY EXPERIENCES

- Wine used to be seen as separate from food, but has now become an integral part of the culinary experience
- As consumers become more interested in their food, its provenance and authenticity, so they do with wine

4. CAVA IS GROWING AND PROSECCO IS LOSING MARKET SHARE

- A recent change in tax has made sparkling wines less expensive, removing an advantage previously held by Prosecco
- Younger drinkers are the key drinkers of sparkling wine in the Netherlands in sparkling wines

5. DUTCH WINE DRINKERS TEMPTED TO TRY SOMETHING NEW AND SPEND A LITTLE MORE TO DO IT

- Experts say there is a desire to try things beyond the 'big five' grape varieties
- People are becoming more interested in wine and more of a mind to spend money on it

6. ORGANIC WINE MORE POPULAR THAN 'FREE FROM' OR LOWER ALCOHOL WINE

- Organic wine fits into the wider popularity of organic produce, following the trend of sustainability

- The data for this survey was collected in the Netherlands in March 2014, March 2017, and March 2018
- Data was gathered via Wine Intelligence's Vinitrac® online survey:
 - 1,015 Dutch regular wine drinkers (March 2014)
 - 1,000 Dutch regular wine drinkers (March 2017)
 - 1,000 Dutch regular wine drinkers (March 2018)
- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy 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 Dutch regular wine drinkers in terms of age and gender



Trade interview methodology

- Trade Interviews were conducted with five experienced industry professionals in the Dutch wine trade in May 2018
- Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing
- The five interviewees were members of the wine trade working in different roles:
 - 1 x PR Manager
 - 2 x Wine Importers
 - 1 x Wine Journalist
 - 1 x Wine Business Consultant

How does Vinitrac® work?

1) Defining the right samples:

- Wine Intelligence, with the support of global research companies (e.g. TNS, YouGov), regularly runs calibration studies in each market in order to define demographic specifications of the wine consumers and the size of the market (i.e. penetration of wine consumption)

2) Running the online survey:

- Invitations to participate in an online survey programmed by Wine Intelligence are then distributed to residents in each market
- Respondents are directed to a URL address, which provides access to the online survey
- Based on given criteria (e.g. age, beverage, frequency of wine consumption) respondents will either proceed or screen out of the survey
- Wine Intelligence monitors completed responses to build samples representative of the target markets' wine drinking population based on the most recent calibration study

3) Cleaning the data:

- When a representative sample is logged, the survey is closed
- Wine Intelligence will then clean out all invalid data points (e.g. those who sped through the survey or gave inconsistent answers to selected questions) and weight the data in order to ensure representability

REPORT PRICE: • AUD 4,500 • GBP 2,500 • USD 3,500 • EUR 3,000 • 5 Report Credits

Format: 92-page PowerPoint (PDF) and Excel data table

Purchase online: <http://www.wineintelligence.com/product-category/report-type/wine-landscape-reports/>

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