Report Brochure

SWITZERLAND WINE MARKET LANDSCAPE

NOVEMBER 2013

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

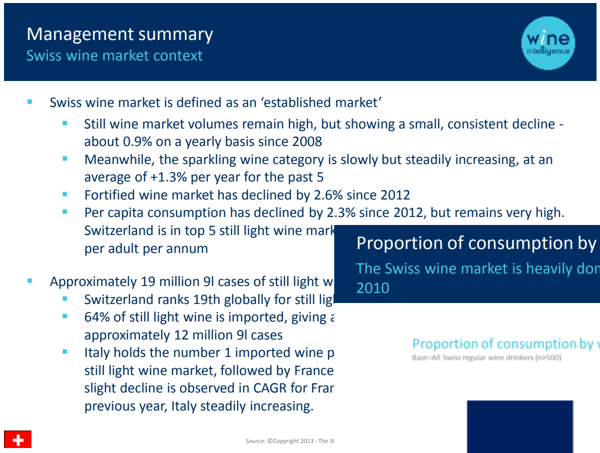
CONTENTS

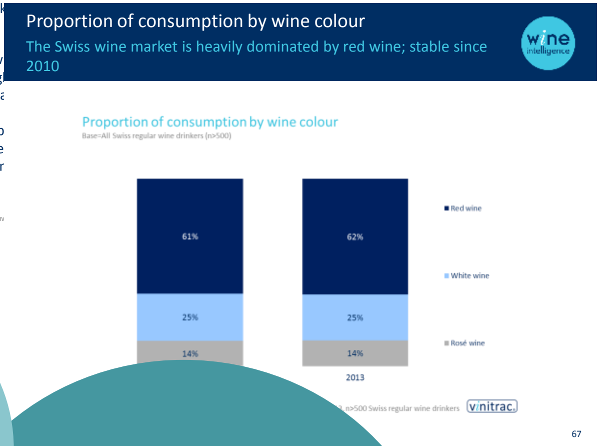
Report price

Report price:

GBP 2,500
EUR 3,000
USD 4,000
AUD 4,250

Report credits:
5





90 page PowerPoint report

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

Excerpts from the introduction

“Wine is big business in Switzerland. It may be one of Western Europe’s smaller nations, and its domestic wines may not be as revered internationally as those from the nations that surround it. But the Swiss are among the most enthusiastic wine consumers: per capita, they are in the top five wine-drinking countries on the planet.”

“Vinitrac® surveys have detected a number of undercurrents that should cause some concern for anyone with a stake in the Swiss wine market. Consumers are admitting to being less adventurous than they used to be. Fewer wine drinkers are enjoying the thrill of seeking out something new and interesting. More are content to stick with what they know. And, although Switzerland is not a country in which wine is considered particularly pricey, the proportion of consumers who do think it’s expensive is increasing. It’s no surprise that supermarkets are still the number one destination for wine purchases, but the dramatic fall in people who buy from specialist wine shops is hardly evidence of a market in the rudest of health.”

“Switzerland is an established market for wine, and one where it’s unrealistic to expect significant growth – indeed it may be more sensible to assume that the gentle decline we have witnessed recently could be part of a longer-term trend. But we’re still talking about a market with an unusually high penetration, and one that offers significant opportunities for wine sales.”

“An opportunity also looks to be opening up in the lower-alcohol wine category. Our research shows that six out of every 10 regular wine drinkers have bought wine with an ABV of between 11% and 12.5%, and plan to do so again. Almost three in 10 say the same thing about wines between 9% and 10.5% ABV. Crunching the numbers from our Vinitrac data, we can see there are already 1.5 million buyers of low-alcohol wine in the market, and 720,000 more potential buyers.”

Graham Holter
Associate Director, publishing
Wine Intelligence

Research methodology
IWSR 2013

- 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 +	Sub-categories
Sparkling (Champagne & other) +	
Fortified +	
Light aperitifs (vermouth…) +	
Other (rice wines...)	

Research methodology

Vinitrac® Overview

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

We comply with both MRS and ESOMAR codes and guidelines for market research practice

Research methodology
Vinitrac® - Frequently Asked Questions

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

Research methodology

Vinitrac® Switzerland methodology

- The data for this study was collected in March 2010 and March 2013
- Data was gathered via Wine Intelligence's Vinitrac® online survey:
  - 1,027 Swiss regular wine drinkers in 2010
  - 541 Swiss 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 2010 and 2013 data is representative of Swiss regular wine drinkers in terms of age and gender

Low alcohol wine section Methodology

3 segments of lower alcohol wine / wine based beverage drinkers based on likelihood to buy wine in the 1 - 5.5%, 6 - 8.5% and 9 – 10.5% categories

- Buyers
  = those who answered "I have bought and will continue to buy" in at least 1 of the 3 categories
- Potentials
  = those who answered "I haven't bought but am open to buying" to at least 1 of the 3 categories and who are not currently buyers
- Non-buyers
  = those who are not buyers nor potentials, and reject buying lower alcohol wine in the future

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Format: 90 page PowerPoint (PDF)

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