



THE FRENCH WINE MARKET LANDSCAPE REPORT

SEPTEMBER 2017





THE FRENCH WINE MARKET
LANDSCAPE REPORT
SEPTEMBER 2017

5
report
credits

[Click here
to
purchase](#)

Report price:
GBP 2,500
USD 3,250
AUD 4,500
EUR 3,00

The **France Landscapes 2017** report includes:

- A 85-page PowerPoint report with the latest information regarding the French wine market, supported by:
 - Wine Intelligence Vinitrac®
 - Wine Intelligence market experience
 - Secondary sources
- User-friendly data table with all the measures from Vinitrac® showing significances, cross tabbed with:
 - All French wine drinkers in 2017
 - Gender groups
 - Age groups
 - Region
- Tracking data 2017 vs 2014
- Internet focus tracking 2017 v 2015

Data table:

- User-friendly data table with all the measures from Vinitrac® showing significances, and cross tabbed with gender, age and annual income groups

Report:

- A 85-page PowerPoint report with the latest information regarding the French wine market

	All sample	Gender	
		Male	Female
Wine attitude			
I enjoy trying new and different styles of wine on a regular basis	42%	43%	42%
I don't mind what I buy so long as the price is right	12%	16%	9%
I know what I like and I tend to stick to what I know	48%	41%	50%
Wine involvement statements			
Drinking wine gives me pleasure	85%	80%	89%
Generally speaking, wine is reasonably priced	62%	58%	65%
I like to take my time when I purchase a bottle of wine	61%	58%	63%
Deciding which wine to buy is an important decision	57%	57%	57%
I always look for the best quality wines I can get for my budget	54%	50%	56%
I have a strong interest in wine	48%	48%	44%
Wine is important to me in my lifestyle	39%	39%	38%
Compared to others, I know less about the subject of wine	33%	32%	33%
I feel competent about my knowledge of wine	30%	35%	28%
Generally speaking, wine is an expensive drink	27%	27%	28%
Wine is a luxury product	26%	21%	29%
	27%	28%	25%

Our team is always available in case you need guidance on how to use our data tables

Focus on Internet use (2)

26% Internet users (who drink wine) buy wine from producers' websites as such) and 14% use drive-throughs

Internet wine purchase penetration (wine merchants websites)

Question: Have you ever bought or do you see yourself buying wine from each of the following types of % of internet users who drink wine who state they have bought wine from the following types of website

Base: All internet users who drink wine (n = 1,505)

Potential market = those who have bought and do buy again or those who have bought but would like to = 61%

From a wine producer's website (e.g. domaine, chateau, etc.)

Supermarkets/hypermarkets.commerces (e.g. drive, intermarche, leader price, Carrefour drive, Auchan, drive, chere drive, etc.)

Private online sales (winemprive.com, 1yourwin.com, vinetocpropriet.com...)

Online wine websites (vinatis.com, wineandco.com, nicolis.com...)

Alcoholic beverage repertoire

The majority of beverage categories saw a decline between 2014 and 2017, except for still rosé wine, Champagne and organic wine, which have remained stable

Beverage repertoire: Tracking 2014 vs 17

% who drink the following alcoholic beverages

Base: All wine drinkers in France (2014: n=955 / 2017: n=1,030)

Rank in 2017	Beverage	2014	2017	Trend
1	Red wine	84%	81%	↓
2	Rosé wine	70%	70%	↔
3	White wine	61%	59%	↓
4	Champagne	17%	17%	↔
8	Sparkling wines, other than Champagne (e.g. crémant)	45%	48%	↑
10	Rosé Champagne	35%	36%	↔
14	Fruit flavoured wine (rosé grapefruit etc.)	25%	21%	↓
16	Organic wine	19%	20%	↔
17	Sparkling rosé wines, other than Champagne (e.g. crémant)	7%	7%	↔
20	Lower alcohol wine (8.5% ou 9% d'alcool)	6%	5%	↓

* Data slightly modified in relation to 2014

Sparkling wines, (e.g. crémant), other than Champagne

Sparkling rosé wines, (e.g. crémant), other than Champagne

Brand power

Listel and M. Cadet are the most well at converting awareness

Brand power: awareness

Base: All wine drinkers in France (n=1,030)

Conversion (those who are aware of the brand and have bought it in the last 6 months)

Awareness (% who are aware of brand)

Size of bubble: Purchase

Contents



■ Introduction	p. 4	■ Wine buying behaviour	p. 39
■ Management summary	p. 6	Choice cues	
■ French wine market overview: trends from 2012-2016	p. 15	Channel use	
Consumption of still light wine per capita		Retailer use	
Imported vs. domestic wine market share		Focus on internet use	
Still light wine consumption by country and PDO (volume and value)		■ Wine consumption in the off- and on-trade	p. 46
Sparkling wine consumption by country and PDO (volume and value)		Off-trade consumption frequency by occasion	
■ Wine consumers in France: overview	p. 24	Off-trade spend by occasion	
Overview of the French wine market		On-trade consumption frequency by occasion	
Demographics of wine drinkers in France		On-trade spend by occasion	
Wine consumption frequency		■ Wine involvement and attitudes	p. 57
■ Beverage repertoire	p. 28	Wine attitude	
Alcoholic beverage repertoire		Wine involvement	
Region of origin awareness and purchase		Perceived expertise and purchase involvement	
Brand power		Attitudes to closures	
Brand awareness		■ Wine consumer profiling by age groups	p. 63
Brand purchase		■ Focus: internet and social media as a resource for information about wine	p. 70
Brand conversion		■ Methodology	p. 83
Brand affinity			
Brand recommendation			

Introduction

The French wine market is often viewed through one of two lenses: first, as one of the main wine-producing countries in the world and second, as a country home to steadily declining wine consumption. Wine consumption is, in effect, declining on average by 2% annually: French people are drinking less and less. But in the wake of this, it's necessary to point out that this is a decline from a heady peak. In 2016, 38 million wine drinkers in France consumed the equivalent of just over 3.1bn bottles – an average of 61 litres per head. Many markets wouldn't dare to dream of such numbers.

As wine assumes a strategic importance for France, we can easily find large amounts of detailed information regarding production, exportation and structural trends of domestic consumption. Sales of wine in large retailers are also well-known, through the panel IRI.

On the other hand, it should be noted that there is a significant lack of information when it comes to trying to understand more precisely the way in which consumers view and behave in the category. For example, what values does wine convey in the eyes of the French? What wines do they know? What are the main wine-drinking occasions? How much do consumers spend on these occasions? How do they choose a wine? Where do they buy it? What potential development is there for the internet for selling wine and talking about it? These are the questions we address in this report.

Of course, the French wine market isn't static. It is changing, driven by consumers who aren't afraid of change. Take, for example, bag-in-box or rosé wine, both of which have seen major progression over the past 10-15 years. More broadly speaking, wine drinkers in France are looking for variety more and more. In 2014, 47% of them said they like to try new wines on a regular basis. In 2017, 55% state this. Conversely, the number of wine drinkers who say they are more likely to stick to wines they know and like has decreased from 40% to 31%. This search for more variety can be seen through the increase in awareness of specific appellations or by the resurgence of interest shown in wine merchants. Other trends have become apparent– wine drinking occasions and attitudes towards screwcaps, for example. Some are clear, some will remain to be seen. I leave it to you to discover them through reading this report.

How does Vinitrac® work?

- The data for this survey was collected in March 2014, May 2017 and July 2017 as part of our Vinitrac® omnibus survey:
 - March 2014 : 985 respondents
 - May 2017 : 1 010 respondents
 - July 2017 : 1505 respondents
- Respondents must reside in France (not including Overseas Departments and Territories), be at least 18 years old and drink red, white or rosé wine
- The sample was created according to quota methods (gender, age, household income and region)
- Quota sources: our calibration (Ipsos for Wine Intelligence, surveys representative of the French adult population)
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis

Sources: Wine Intelligence, Vinitrac® France
March '14 (n=985 all wine drinkers in France)
May '17 (n=1 010 all wine drinkers in France)
July '17 (n=1 505 all wine drinkers in France)

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 3,250 • EUR 3,000 • 5 Report Credits

Format: 85-page PowerPoint (PDF)

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

Contact us directly: reports-shop@wineintelligence.com

If you have any questions, please contact your local Wine Intelligence office:

AVIGNON OFFICE

Jean-Philippe Perrouy, Director, Wine Intelligence France | T +33 (0)486 408 417 | Email: jean-philippe@wineintelligence.com

CAPE TOWN

Dimitri Coutras, South Africa Country Manager | T +27 828288866 | Email: dcoutras@iafrica.com

DELAWARE

Erica Donoho, USA Country Manager | T +1 973 699 4158 | Email: erica@wineintelligence.com

FRANKFURT

Wilhelm Lerner, Associate Director/Germany Country Manager | T +49 (0)175 5806 151 | Email: wilhelm@wineintelligence.com

LONDON OFFICE

Eleanor Hickey, Business Manager | T +44 020 7378 1277 | Email: eleanor@wineintelligence.com

SAO PAULO

Rodrigo Lanari, Brazil Country Manager | T +55 (0) 11 3065-8411 | Email: rodrigo@wineintelligence.com

SYDNEY OFFICE

Liz Lee, Australia Country Manager | T +61 (0) 416 638 272 | Email: liz@wineintelligence.com

TRIESTE

Pierpaolo Penco, Italy Country Manager | T +39 349 424 3371 | Email: pierpaolo@wineintelligence.com

VALLADOLID OFFICE

Juan Park, Director, South America and Iberia | T +34 637 214 829 | Email: juan@wineintelligence.com