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# POLAND LANDSCAPES

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October 2018 Report

A circular logo with a light blue background. The word "wine" is written in a lowercase, sans-serif font, with the "i" having a dot. Below it, the word "intelligence" is written in a smaller, lowercase, sans-serif font.

wine  
intelligence

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### Report price:

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The Poland Landscapes 2018 report includes:

Report with the latest information regarding the Polish wine market, supported by:

- Wine Intelligence Vinitrac® Poland
- Wine Intelligence market experience
- Secondary sources
- Trade interviews

User-friendly data table with all the measures from Vinitrac® showing significances, cross tabbed with:

- All Polish semi-annual wine drinkers in 2018
- Gender groups
- Age groups
- Regions
- Tracking data vs. 2015

## POLAND - MARKET OVERVIEW

Poland has been strong economically over recent years and is no longer ranked by FTSE Russell as an ‘Emerging Market’, having been re-classified as a ‘Developed Market’. With a population of 38 million, Poland is the largest single market among the newer EU states and has risen to be the EU’s sixth largest economy in term of GDP.

Since joining the EU in 2004, free movement of trade has led to importation of goods becoming easier, with sales of wine in Poland having grown nearly 60% since then. As Poland relies primarily on imports, it has capitalised on the access to EU wines.

With increasing consumer confidence, the Polish population are more willing to spend on non-essentials such as wine, which is considered a ‘luxury’ good.

Although Poland’s GDP per capita continues to catch up to other Western European countries, their average disposable income remains less than the EU average.

Nonetheless, Poland has seen a rise of young professionals who are enjoying increased wages and both traveling and spending more. Influences from neighbouring wine-loving Western European countries are transforming Poland’s traditional culture and thus the wine market is showing promising growth, which is expected to continue.

Poland Consumer Confidence



Source: TradingEconomics.com, Central Statistical Office of Poland (GUS)

### 1. GROWING MARKET FOR STILL WINE, WITH INCREASING VOLUME AND CONSUMPTION FREQUENCY

- Poland has evolved from an 'Emerging' market to a 'Growth' market, according to the Wine Intelligence Global Compass market classification
- Per capita consumption of still wines has steadily increased with a growing consumption frequency, shifting from 'once every 2-3 times' to '1-3 times a month' when compared with 2015

### 2. CONSUMERS ARE BECOMING MORE ENGAGED IN THE CATEGORY WITH INCREASED KNOWLEDGE AND CONFIDENCE WITH WINE

- Compared to 2015, wine drinkers in Poland have become increasingly engaged with the category of wine
- There is an evident increase in knowledge, confidence and interest, with more factors being considered as important in the wine buying decision-making process

### 3. MILLENNIALS SEEM TO BE DRIVING THE GROWTH

- The wine consumption culture in Poland has undergone a visible change over recent years, and Millennials are largely accountable for these changes
- Wine is becoming more established with and embraced by younger consumers in Poland
- As younger Polish drinkers travel the world, they become more exposed to a broader range of varietals and wine styles, creating a demand for more European imports in the Polish wine market

### 4. FEWER WINE BRANDS ARE BROADLY KNOWN IN POLAND

- Brand awareness is not particularly strong in the Polish market, with only a handful of brands taking precedence
- Despite Carlo Rossi being the most well-known and consumed brand, California ranks low compared with other wine-producing countries for awareness and purchase
- Younger consumers are more influenced by label design than older drinkers

### 5. PROMOTIONAL ACTIVITY A STRONG DRIVER OF CONSUMPTION TRENDS

- The wine choices of Polish drinkers are strongly influenced by promotional activities such as sales promotions within popular wine buying channels or informative events
- The popularity of Portuguese wine is significantly influenced by its availability, being heavily stocked at the Portuguese-owned company Biedronka; the largest discount supermarket chain in Poland
- Brands from a larger, broader range of wine producers and more premium wine brands are therefore less readily available in Poland

### 6. ONLINE PURCHASING IS TECHNICALLY ILLEGAL IN POLAND, YET YOUNGER CONSUMERS INCREASINGLY REPORT PURCHASING WINE THIS WAY

- Online wine sales are very limited in Poland due to government regulations that prohibits the selling of alcohol without a valid license
- Nonetheless, this channel has grown since 2015 and is more prominently used by young buyers aged between 18-34 years

- The data for this survey was collected in Poland in March 2015, and March & July 2018
- Data was gathered via Wine Intelligence’s Vinitrac<sup>®</sup> online survey:
- 1,000 Polish semi-annual wine drinkers (March 2015)
- 2,000 Polish semi-annual wine drinkers (March & July 2018 – merged)
- 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 Polish semi-annual wine drinkers in terms of age and gender
- The distribution of the sample is:

		Mar'15	Mar'18 + Jul'18
		<i>Sample size n=</i> 1,000	<i>2,000</i>
Gender	Male	43%	42%
	Female	57%	58%
	<i>Total</i>	<i>100%</i>	<i>100%</i>
Age	18-24	17%	14%
	25-34	25%	25%
	35-44	19%	19%
	45-54	18%	18%
	55-64	15%	15%
	65 and over	6%	10%
	<i>Total</i>	<i>100%</i>	<i>100%</i>

Source: Wine Intelligence, Vinitrac<sup>®</sup> Poland, Mar'15 n=1,000 and Mar'18 & Jul'18 n=2,000 Polish semi-annual wine drinkers

## How does Vinitrac<sup>®</sup> 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



### Trade interview methodology

- Trade Interviews were conducted with seven experienced industry professionals in the Polish wine trade in September 2018
- Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing
- The seven interviewees were members of the wine trade working in different roles:
  - 1 x Wine Sommelier
  - 1 x Wine Distributor
  - 1 x Wine Blogger
  - 1 x Wine Writer
  - 2 x Wine Retailers
  - 1 x PR Agency Director

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