

SWITZERLAND LANDSCAPES

November 2018 Report



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Introduction to the Switzerland Landscapes 2018 report

Swiss consumers have a relatively traditional approach to wine: with a strong preference for wines from neighbours France and Italy, food and wine pairing and traditional cork closures.

Within Switzerland, there are two distinct groups of consumers: those who are French-speaking and those who speak German, with consumers in each of these regions displaying a distinct and different relationship with the category.

French-speaking regular wine drinkers are generally more involved in the wine category, drink wine more frequently and are more adventurous with their wine choices. These drinkers also typically consider country and region of origin as well as expert validation to be particularly important when buying wine.

By contrast, German-speaking drinkers have a tendency to drink wine less frequently than their French-speaking counter-parts. They are also more likely to choose both locally grown and lower-calorie wine. However, the two groups do have commonalities: their interest in choosing wine based on it complementing food with food matching being the top driver amongst Swiss regular wine drinkers. For example, 82% reported that they find it to be the most important factor when purchasing a wine. Trade experts suggest wine is intertwined with gastronomy in Switzerland, which can disadvantage some Old-world producing countries in particular, due to the lack of association of these origins with food typically served in Switzerland.

In 2016, the Swiss government implemented stricter drinking and driving regulations, reported to have contributed to a shift in wine consumption behaviour and suggested to be a contributor to the small decline in volume of wines sold in Switzerland since 2016, particularly in the on-trade.

With a classification as a mature market, according to the Wine Intelligence Global Compass 2018 report, the volume of wine consumed in Switzerland is expected to slowly decline. However, with Swiss consumers continuing to have a strong and positive interest in wine, the trade are confident in the market remaining strong.

Switzerland Landscapes 2018 report

Report overview



Report price:

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

5
report
credits

The Switzerland Landscapes 2018 report includes:

- Report with the latest information regarding the Swiss 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 Swiss regular wine drinkers in 2018
 - Gender groups
 - Age groups
 - Regions
- Tracking data vs. 2013

1. DESPITE A DECLINING VOLUME OF WINE SOLD IN SWITZERLAND, IT REMAINS ONE OF THE MOST ATTRACTIVE WINE MARKETS IN THE WORLD DRIVEN BY RELATIVELY HIGH PRICE POINTS AND HIGH PER CAPITA CONSUMPTION

- As a mature market for wine, Switzerland has seen the volume of still wine consumed decline between 2013 and 2017
- Although per capita consumption of still wine in Switzerland has declined, it is ranked as the sixth largest market in terms of per capita consumption

2. SWISS CONSUMERS CONTINUE TO HAVE A LOYALTY FOR WINE-PRODUCING NEIGHBOURS AND SPAIN, WITH A LONGER TERM INCREASE PERFORMANCE FROM PORTUGAL

- Beyond wines from Switzerland, the Swiss wine market continues to be dominated by wines from France, Italy and Spain, the three countries with the highest market shares in the Swiss still wine market
- The three most powerful wine brands in the Swiss market originate from Spain, France and Italy respectively, reflecting the dominance of these three countries of origin in terms of volume

3. A GREATER PROPORTION OF FRENCH-SPEAKING DRINKERS ARE HIGHER-INVOLVED, MORE ADVENTUROUS WINE DRINKERS WHILST MORE GERMAN-SPEAKING DRINKERS ARE LESS EXPERIMENTAL AND MORE HEALTH CONSCIOUS WITH WINE

- Regular wine consumers who live in the French-speaking region of Switzerland are generally more involved in the wine category
- Quantitative and qualitative data suggests regular wine consumers in the German-speaking region of Switzerland are more locally driven and health-conscious when purchasing wine

4. FOOD AND WINE PAIRING ARE THE MOST PROMINENT DRIVERS WHEN PURCHASING WINE, WHICH IS TYPICALLY NOT THE KEY DRIVER IN OTHER WINE MARKETS

- Matching or complimenting food is the top driver amongst Swiss regular wine drinkers, with 82% of them claiming that they find it the most important factor when purchasing wine, a driver which is typically not the primary driver of choice for wine in other markets
- The increased interest in food and wine matching is also being driven by the fact that the proportion of wine drinkers, especially French-speakers, enjoying wine whilst out at a bar or pub or restaurant has increased since 2013

- The data for this survey was collected in Switzerland in March 2017 and March & October 2018
- Data was gathered via Wine Intelligence's Vinitrac® online survey:
- 541 Swiss regular wine drinkers (March 2013)
- 1,500 Swiss regular wine drinkers (March & October 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 Swiss regular wine drinkers in terms of age, gender and region
- The distribution of the sample is:

Switzerland			
		2013	2018
<i>sample size:</i>		541	1500
Gender	Male	55%	53%
	Female	45%	47%
	<i>Total</i>	100%	100%
Age	18-24	10%	8%
	25-34	17%	17%
	35-44	20%	19%
	45-54	21%	22%
	55 and over	32%	35%
	<i>Total</i>	100%	100%
Region	Eastern Switzerland	13%	11%
	Zürich	16%	19%
	Central Switzerland + Ticino	10%	14%
	Northwestern Switzerland	13%	12%
	Espace Mittelland	25%	22%
	Lake Geneva Region	23%	22%
	<i>Total</i>	100%	100%

Source: Wine Intelligence, Vinitrac® Switzerland, Mar '13 (n=541) and Mar & Jul '18 (n=1,500), Swiss regular wine drinkers

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



Trade interview methodology

- Trade Interviews were conducted with four experienced industry professionals in the Swiss wine trade in October
- Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing
- The four interviewees were members of the wine trade working in different roles:
 - 1 x Wine Brand Manager
 - 1 x Wine educator
 - 1 x Wine buyer
 - 1 x Wine educator and consultant

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