
NORWAY LANDSCAPES

January 2019 Report

The logo for Wine Intelligence, featuring the word "wine" in a lowercase, sans-serif font with a dot above the "i", and "intelligence" in a smaller, lowercase, sans-serif font below it. The text is white and set against a light blue circular background.

wine
intelligence



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Report price:

GBP 2,500
USD 3,300
AUD 4,700
EUR 2,900

5
report
credits

The Norway Landscapes 2019 report includes:

- Report with the latest information regarding the Norwegian wine market, supported by:
 - Wine Intelligence Vinitrac® Norway
 - Wine Intelligence market experience
 - Secondary sources
 - Trade interviews
- User-friendly data table with all the measures from Vinitrac® showing significances, cross tabbed with:
 - All Norwegian regular wine drinkers in 2018
 - Gender groups
 - Age groups
 - Counties and income
 - Wine involvement
- Tracking data vs. 2013 and 2017
- Age profiling

Norway Landscapes 2019

Norway is a country known for its unquestionable beauty and rich culture. However, like many wine markets worldwide, Norway is experiencing new trends that indicate a decrease in wine culture. Of the Nordic countries, Norway has experienced the highest decrease in per capita consumption of still wine between 2013 and 2017. However, while the *volume* of still light wine sold in Norway has steadily decreased since 2014, over the past year, the overall *frequency* of wine consumption amongst Norwegian regular wine drinkers has remained relatively stable. As the price per bottle has steadily increased throughout the years along with high tax on alcohol, it comes to no surprise that those who perceive wine as an expensive beverage has significantly increased and the average spend per bottle for off-trade occasions has increased over the past five years.

In line with these trends, it also appears that Norwegian wine consumers are becoming less adventurous, displayed by a lower proportion of regular wine drinkers being willing to experiment trying new wines compared to 2013. Despite this, when consumers do purchase wine, they seem to prioritise value for money, as a significantly higher proportion of Norwegian regular wine drinkers look for the best quality wines that they can get for their budget.

As with all alcohol in Norway, wine sales remain controlled by the government-regulated monopoly, Vinmonopolet. While the highest proportion of Norwegian regular wine drinkers purchase wine from the monopoly, it faces competition from other wine retailers including its Swedish neighbour, Systembolaget, as well as other overseas retailers. The good news is that in a market dominated by Old World wine producers, especially Italy, New World brands are actually performing quite well, primarily those brands from Chile and Australia, with Casillero del Diablo being the most powerful wine brand in Norway.



Emily Carroll
Senior Project Executive

Management summary

Key trends in the Norway wine market



1. The wine volume sold in Norway has decreased, while the overall frequency of wine consumption has remained stable
2. Norwegian consumers are increasingly seeing wine as an expensive product
3. Increased proportion of Norwegians are purchasing wine from overseas, due to high alcohol tax
4. Chilean and Australian brands are doing well, plus Torres

- The data for this survey was collected in Norway in October 2013, May 2017 and July 2018
- Data was gathered via Wine Intelligence’s Vinitrac[®] online survey:
 - 560 Norwegian regular wine drinkers (October 2013)
 - 506 Norwegian regular wine drinkers (May 2017)
 - 1,000 Norwegian regular wine drinkers (July 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 Norwegian regular wine drinkers in terms of age and gender
- The distribution of the sample is:

		Norway		
		2013	2017	2018
<i>Sample Size</i>		<i>560</i>	<i>506</i>	<i>1,000</i>
Gender	Male	51%	50%	52%
	Female	49%	50%	48%
	Total	100%	100%	100%
Age	18-24	11%	10%	10%
	25-34	17%	17%	15%
	35-44	18%	18%	18%
	45-54	18%	18%	17%
	55 and over	37%	38%	40%
	TOTAL	100%	100%	100%

Source: Wine Intelligence, Vinitrac[®] Norway, Oct 2013 (n=560), May 2017 (n=506), and July 2018 (n=1,000), Norwegian regular wine drinkers



Trade interview methodology

- Trade Interviews were conducted with two experienced industry professionals in the Norwegian wine trade in December 2018 and January 2018
- Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing
- The two interviewees were members of the wine trade working in different roles:
 - *1 x Wine Market Specialist*
 - *1 x Wine Insight Manager*

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

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AVIGNON

Jean-Philippe Perrouty, 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, US 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

Emily Carroll, Project Executive | T +44 020 7378 1277 | Email: emily@wineintelligence.com

SAO PAULO

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

SYDNEY

Ben Luker, Business Executive | T +61 (0) 416 638 272 | Email: ben@wineintelligence.com

TRIESTE

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

VALLADOLID

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