
DENMARK LANDSCAPES

February 2019 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 above it. Below "wine" is the word "intelligence" in a smaller, lowercase, sans-serif font.

wine
intelligence



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Denmark Landscapes 2019 report

Report Overview



Report price:

GBP 2,500

USD 3,300

AUD 4,700

EUR 2,900

5
report
credits

The Denmark Landscapes 2019 report includes:

- Report with the latest information regarding the Danish wine market, supported by:
 - Wine Intelligence Vinitrac® Denmark
 - Wine Intelligence market experience
 - Secondary sources
 - Trade interviews
- User-friendly data table with all the measures from Vinitrac® showing significances, cross tabbed with:
 - All Danish regular wine drinkers in 2018
 - Gender groups
 - Age groups
 - Regions and Income
 - Wine involvement
- Tracking data vs. 2013, 2016 and 2017
- Age profiling

As the wine market reported to have the highest number of wine importers per head, the wine offer in Denmark is diverse. Denmark continues to have a relatively high per capita consumption of wine, ranked in 9th place globally, higher than that of its Nordic neighbours Sweden (21st), Norway (36th) and Finland (41st). While the proportion of Danes who drink wine has remained stable in recent years, Danish regular wine drinkers are changing in terms of their relationship with category.

First, Danish wine consumers are taking a premiumisation approach to the wine category, evidenced by a decrease in per capita consumption alongside an increase in both per bottle spend and a corresponding uplift in the value of the category. Danes are increasingly willing to spend more in the off-trade on a bottle for all of their wine drinking occasions than they have done over the past few years. Despite a decline in this per capita consumption of wine, the overall frequency of wine consumption in Denmark remains relatively high, with 66% of regular wine drinkers consuming wine at least once per week. This is driven by Danish wine consumers aged 55+, who are more likely to drink wine at least once a week compared to younger wine drinkers.

With recent summers being particular long and hot, Danish consumers are gravitating towards lighter, refreshing styles of wine, particularly rosé, white wine and sparkling wines. Gastronomical influences greatly contribute to this shift towards lighter wines as wine drinkers in Denmark report that food and wine matching has become significantly more important as a driver of wine choice.

Introduction

Denmark Landscapes 2019



The major wine exporting nations of Italy, France, Chile, Spain and Australia have prominence in the wine shops and on the wine lists of Denmark. However, Danish regular wine drinkers are displaying a narrowing recalled wine origin repertoire – a shift that aligns with recent global trends. On the contrary, consumers are showing increased interest in niche varietals, primarily lesser known red varietals such as Gamay or Sangiovese. Along with the increased interest in niche varietals, organic and sustainable wines are also gaining their place in the Danish wine category, indicated by Danish trade experts who suggest the increase in demand is driven by three trends: health and wellness, gastronomy and sustainability concerns.

In terms of wine purchasing behaviour, the majority of Danish regular wine drinkers continue to purchase wine from supermarkets. However, those buying wine online has significantly increased over the past five years, in part due to the improvement and introduction of online shopping experiences from major retailers such as Coop, Føtex and Rema 1000. At the same time, a reducing proportion of Danes are purchasing wine in the on-trade and particularly when in restaurants, instead choosing to enjoy wine at home for informal occasions.



Emily Carroll
Senior Project Executive

Management summary

Key trends in the Danish wine market

1. Danish wine consumers taking a premiumisation approach to wine
2. Wine consumption driven by Denmark's maturing wine drinkers
3. Movement towards lighter styles of wine in Denmark
4. Sparkling wine category growing in Denmark
5. Ongoing positive impact on wine thanks to the culinary movement
6. Danes displaying narrowing recalled wine origin repertoire, aligning with global trends
7. Increased interest in niche varietals, especially in red wine
8. Elevated demand for organic and sustainable wines
9. Whilst supermarkets continue to dominate, online wine purchases are increasing
10. Shifts from on-trade drinking to more casual off-trade drinking

- The data for this survey was collected in Denmark in March 2013, October 2016, July 2017 and July 2018
- Data was gathered via Wine Intelligence’s Vinitrac[®] online survey:
 - 618 Danish regular wine drinkers (March 2013)
 - 1,008 Danish regular wine drinkers (October 2016)
 - 1,000 Danish regular wine drinkers (July 2017)
 - 1,000 Danish 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-premise or in the on-premise
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The data is representative of Danish regular wine drinkers in terms of gender and age
- The distribution of the sample is:

		Denmark			
		Mar-13	Oct-16	Jul-17	Jul-18
<i>sample size</i>		618	1,008	1,000	1,000
Gender	Male	52%	52%	53%	53%
	Female	48%	48%	47%	47%
	Total	100%	100%	100%	100%
Age	18-24	9%	9%	8%	8%
	25-34	14%	14%	15%	15%
	35-44	17%	17%	14%	14%
	45-54	18%	18%	19%	19%
	55+	42%	42%	44%	44%
	Total	100%	100%	100%	100%

Source: Wine Intelligence, Vinitrac[®] Denmark, March 2013 (n=618), October 2016 (n=1,008), July 2017 (n=1,000) and July 2018 (n=1,000) Danish regular wine drinkers



Trade interview methodology

- Three trade interviews were conducted with experienced industry professionals in the Danish wine trade in January 2019
- Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing
- The interviewees were members of the wine trade working as:
 - *1x Wine Educator*
 - *1x Wine Magazine Editor*
 - *1x Wine Journalist*

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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