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# GERMANY LANDSCAPES

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April 2019 Report

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

wine  
intelligence



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# Germany Landscapes 2019 report

## Report Overview



### Report price:

GBP 2,500

USD 3,300

AUD 4,700

EUR 2,900

5  
report  
credits

The Germany Landscapes 2019 report includes:

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

- Wine Intelligence Vinitrac® Germany
  - Wine Intelligence market experience
  - Secondary sources
  - Trade interviews
- 
- User-friendly data table with all the measures from Vinitrac® Germany showing significances, cross tabbed with:
    - All German regular wine drinkers in 2019
    - Gender groups
    - Age groups
    - German regions
    - Income
    - Wine Involvement
    - Tracking data 2016-2017-2018-2019

Germany is not only one of the largest wine markets in the world, but also ranks amongst the most mature and attractive markets. Over the years, still and sparkling wine volumes, along with value and per capita consumption, have remained relatively stable. Despite this, however, developments from a consumer perspective are very much evident within the category, with one trend being a 'quality over quantity' approach to wine. German regular wine drinkers are consuming wine less frequently in the long- and short-term both for casual and more formal on-trade and the off-trade occasions since 2016. Hand in hand with this, however, comes an increased willingness to trade up when purchasing wine, due to both the increasing value per bottle as well willingness to spend more on a bottle of wine, especially in the on-trade.

Linked with their traditional approach, German wine drinkers like to be patriotic in their choices. German 'regionality trends' are certainly prevalent as German wine drinkers are increasingly driven by supporting local producers. More specifically, Germany displays the highest country of origin awareness and purchase levels amongst German regular wine drinkers and holds six of the top ten places for region of origin purchase amongst German wine consumers. This trend is also confirmed by market experts, who believe taking advantage of regionality trends can benefit both producers and retailers.

That being said, wine brands in Germany are not as strong as brands in other markets such as in the US or UK. Despite being a strong wine-producing country, only six of the top 15 most powerful brands in the German market are domestic brands. Along with this, German wine drinkers do have lower overall brand awareness and purchase compared with other major wine markets. Yet, this can be considered helpful as many market experts have suggested lower levels of brand awareness and purchase presents the opportunity to educate consumers about wine and bring them closer to the category. This may provide industry professionals the chance to immerse consumers in the category and develop products that are both authentic and approachable, therefore being able to attract more consumers.

This not only goes for German wine professionals, but also other countries of origin looking to gain presence in the German wine market. As a market primarily dominated by the Old World, including not only Germany, but also France, Italy and Spain, the New World struggles for attention. As one of the world's biggest imported wine markets, wine education could lead to exciting prospects for both those who already dominate the category, as well as those who are seeking to establish or boost market presence.



*Tina Fruth*  
*Project Executive*

1. German wine market remains a mature, stable market
2. Wine consumers drinking less frequently while trading up
3. Consumers increasingly driven by regionality and locality when purchasing wine
4. Reducing recalled knowledge of aligns with global trends
5. Six of the top 15 most powerful brands in Germany are domestic brands
6. Lower overall brand awareness and purchase compared with other markets
7. Opportunities for wine education in Germany

- The data for this report was collected in Germany in March 2016, March 2018, January 2019
- Data was gathered via Wine Intelligence’s Vinitrac® online survey:
  - 1,005 German regular wine drinkers (March 2016)
  - 1,006 German regular wine drinkers (March 2018)
  - 1,014 German regular wine drinkers (January 2019)
- 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 German regular wine drinkers in terms of gender, age and region
- The distribution of the sample is shown in the table

		Germany		
		Mar 16	Mar 18	Jan 19
		<i>sample size:</i>		
Gender	Male	43%	42%	43%
	Female	57%	58%	58%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Age	18-24	5%	4%	4%
	25-34	12%	12%	12%
	35-44	18%	16%	16%
	45-54	23%	22%	22%
	55 and over	42%	46%	46%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Region	Baden-Wurtemberg	14%	15%	15%
	Bayern	16%	17%	17%
	Berlin	4%	4%	4%
	Brandenburg + Mecklenburg-Vorpommern	6%	4%	5%
	Niedersachsen + Bremen	10%	10%	10%
	Schleswig-Holstein + Hamburg	5%	6%	6%
	Hessen	7%	7%	7%
	Nordrhein-Westfalen	19%	19%	19%
	Rheinland-Pfalz + Saarland	7%	6%	6%
	Sachsen + Sachsen-Anhalt + Thingen	12%	11%	11%
	<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Source: Wine Intelligence, Vinitrac® Germany, Mar'16 n=1,005, Mar'18 n=1,006, Jan'19 n=1,014 German regular wine drinkers



### Trade interview methodology

- Trade interviews were conducted with 6 experienced industry professionals in German wine trade in March and April 2019
- Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing
- The 6 interviewees were members of the wine trade working in different roles within the industry:
  - x 3 *Managing Directors of German Wine Cooperatives*
  - x 1 *Online retailer*
  - x 1 *Business Development Manager*
  - x 1 *Wine Buyer*

xxxx  
Trade Expert Title

Insights from trade interviews conducted for this report



### Consumer interview methodology

- Four consumer interviews were conducted with German regular wine drinkers in October 2018
- The interviews lasted between 30 and 45 minutes and were done via phone or in person, covering general wine drinking and buying behaviors and preferences, motivations and attitudes towards wine and purchase choice cues

xxxx  
German regular wine drinker

Insights from consumer interviews included in this report

## 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

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