



WINE INTELLIGENCE

# WINE SHOPPER REPORT

# GERMANY

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# Wine Shopper Report – Germany

## Introduction

Germany is not only one of the largest wine markets in the world, but also ranks among the most mature and attractive markets. Still wine volumes remain relatively stable, with a slight decrease in domestic wine volumes (-1 CAGR). In the channel to market landscape, supermarkets and discounters are the most-used channels. Supermarkets and the internet have become increasingly more important as sales channels since 2007, while mail order has been decreasing. Online, with focus on specialized trade, shows strong growth from a small base.

In this highly competitive market thorough understanding of retailer positioning, performance in the wine category and shopper behavior of wine drinkers becomes key success factors to defend or win share as well as realizing value growth. This report reviews the performance of retailers using the Net Promoter Score as an indicator, describes the profiles of wine drinkers that mainly shop with the respective retailers and provides an initial shopper focused segmentation of German wine drinkers.

With about one third of off-trade wine drinkers that have bought wine in the past 6 months at Rewe or Edeka, both are the most used retailers for wine purchases, closely followed by Aldi and Lidl. Both Rewe and Edeka are also in close competition for being the primary retailer from which off-trade wine drinkers mainly purchase their wine from.

In contrast to the most used retailers, the specialist wine retailer Jacques' Weindepot has the highest share of promoters, followed by the Cash & Carry-market Metro and the specialist wine retailer Hawesko. The two specialist wine retailers Jacques' Weindepot and Hawesko also have the highest Net Promoter Score (NPS), followed by Globus and Metro. Three out of top five NPS-ranking retailers are specialist wine retailers. Retailers with larger outlets / wine portfolios also tend to have higher Net Promoter Scores than those with smaller outlets / wine portfolios. Discounters have the lowest NPS scores.

Main-buyers of each retailer show significant differences regarding socio-demographics, consumption frequency, wine attitude, how they purchase, which brands they purchase and what they drink in general. Brand owners are well advised to reflect shopper differences of retailers in their brand strategy, account management as well as shopper, category and trade marketing.

Strong online wine retail NPS scores indicate the future potential of this channel for Germany. Initial shopper analysis identified a new generation of multichannel-shoppers which also points towards growth opportunities for online, hybrid on- and offline approaches and new formats.



*Wilhelm Lerner*  
*Country Manager Germany*

- The data for this report was collected in Germany in July 2017, October 2018 and January 2019
- Data was gathered via Wine Intelligence’s Vinitrac® online survey:
  - 1,000 German regular wine drinkers (July 2017)
  - 2,005 German regular wine drinkers (October 2018 + 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
- 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			
		Jul '17	Oct '18 + Jan'19
		<i>n=</i> 1,000	2,005
Gender	Male	43%	42%
	Female	57%	58%
	<b>Total</b>	<b>100%</b>	<b>100%</b>
Age	18-24	4%	4%
	25-34	12%	12%
	35-44	16%	16%
	45-54	22%	22%
	55-64	30%	29%
	65 and over	17%	17%
	<b>Total</b>	<b>100%</b>	<b>100%</b>
Region	Baden-Württemberg	15%	15%
	Bayern	17%	17%
	Berlin	4%	4%
	Brandenburg + Mecklenburg-Vorpommern	5%	5%
	Niedersachsen + Bremen	10%	10%
	Schleswig-Holstein + Hamburg	6%	6%
	Hessen	7%	7%
	Nordrhein-Westfalen	19%	19%
	Rheinland-Pfalz + Saarland	6%	6%
	Sachsen +Sachsen-Anhalt +Thüringen	11%	11%
	<b>Total</b>	<b>100%</b>	<b>100%</b>

Source: Wine Intelligence, Vinitrac® Germany, Jul '17 n=1,000, Oct'18 + Jan'19 n=2,005 German 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

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For more information about Wine Intelligence please contact us:

Wine Intelligence  
109 Maltings Place  
169 Tower Bridge Road  
London  
SE1 3LJ  
UK

Telephone: +44 (0)20 7378 1277

Email: [info@wineintelligence.com](mailto:info@wineintelligence.com)

Web: [www.wineintelligence.com](http://www.wineintelligence.com)

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