WINE INTELLIGENCE

SWITZERLAND WINE LANDSCAPES 2021

MAY 2021

REPORT BROCHURE

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INTRODUCTION

Switzerland has long cultivated a reputation on the global stage as a place where things move slowly and steadily, and where cultural norms remain consistent. When it comes to the wine category, the cultural stereotype largely holds true: the market for wine tends to move at a glacial pace and consumption norms do not shift fundamentally from year to year.

However Swiss wine drinkers *are* exhibiting change, albeit at a very Swiss pace. As part of this report, we have tracked consumer behaviour and attitude over 7 years, back to 2013, to see what fundamental shifts might be occurring.

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.

One thing the two language groups do agree on is their broader relationship with the wine category. Both French and German speakers have similar levels of intellectual connection with the category, and this involvement with the category has been steadily growing over the past few years. While the French appear to be more likely to see wine as an important cultural element in their lifestyle, the German speakers are more likely to agree that wine is reasonably priced. Their knowledge and confidence levels are similar as well.

Growing involvement levels normally signal, or reflect, growing premiumization within a given market, and Switzerland is no exception. Recalled spend on wine has risen on average by just under 1 Swiss Franc per bottle in the off premise, and by 2-3 Swiss Francs in the off premise since 2018. Note that this is in a market where inflation is typically close to zero.

As with other markets, there is a growing divide between young and old. Older drinkers have more knowledge, not surprisingly, and younger drinkers profess to be more adventurous and discovery-oriented. Younger consumers are also drinking wine much less often than their older counterparts, reflecting a global trend among under 45s to drink less frequently and, when they do buy wine, spend more per bottle.

EXAMPLE SLIDE: MANAGEMENT SUMMARY

wine intelligence

LANGUAGE DIVIDE INFLUENCES COUNTRY OF ORIGIN REPERTOIRE

French-speaking Swiss stick more closely to France, while German speakers have a broader repertoire

Regular wine consumers who live in the French-speaking areas of Switzerland are more traditional in their wine purchasing behaviour, consuming wine mainly from Old World wine-producing countries

The most important factor to French-speaking consumers when selecting a bottle of wine to purchase is the country of origin

German-speaking consumers, however, are more open to New World regions with a significantly higher proportion aware of wines from South Africa and Australia compared with French-speaking Swiss consumers

Country of origin **consumption** by language

% who have drunk wine from the following places in the past 6 months
Base = All Swiss regular wine drinkers (n=700)

Rank 2020		All Swiss regular wine drinkers	Language: French	Language: German
	n=	*700*	*233*	*467*
1	Switzerland	71%	76%	68%
2	Italy	63%	61%	64%
3	France	57%	66%	52%
4	Spain	43%	40%	44%
5	Portugal	22%	23%	21%
6=	California - USA	15%	11%	18%
6=	Germany	15%	6%	19%
8	Austria	14%	3%	19%
9=	South Africa	12%	6%	15%
9=	Argentina	12%	10%	13%
11	Chile	10%	10%	10%
12	Australia	8%	2%	11%
13	New Zealand	3%	2%	3%
14	Other USA (outside of California)	1%	2%	1%

WHAT DO MARKET EXPERTS SAY?

"French-speaking Switzerland tends more to buy French-Swiss wines and French wines. In German-speaking Switzerland there is a tendency to buy more foreign wines, partly indigenous, but also German and Austrian"

Wine Distributor, Switzerland

Wine Intelligence trade interview programme 2021
Red / Blue: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Switzerland, October 2020 (n=700) Swiss regular wine drinkers

EXAMPLE SLIDE: WINE CONSUMPTION FREQUENCY

Consumption frequency has remained stable since 2013, though there is a notable contrast between the frequent drinking habits of over 55s compared with the more occasional wine consumption exhibited by under 35s

Wine consumption frequency: Tracking

% who usually drink wine at the following frequency
Base = All Swiss regular wine drinkers (n≥541)

	2013	2018	2020	Tracking	
n=	*541*	*1,500*	*700*	vs. '13	vs. '18
Most days / every day	13%	11%	12%	➡	➡
2-5 times a week	29%	25%	28%	➡	➡
About once a week	30%	33%	32%	➡	➡
1-3 times a month	29%	32%	29%	➡	➡

Wine consumption frequency by age and language

% who usually drink wine at the following frequency
Base = All Swiss regular wine drinkers (n=700)

		Age groups			Language	
	All Swiss regular wine drinkers	18-34	35-54	55 and over	French	German
n=	*700*	*169*	*281*	*250*	*233*	*467*
Most days / every day	12%	3%	10%	19%	18%	8%
2-5 times a week	28%	24%	30%	28%	27%	28%
About once a week	32%	35%	34%	28%	30%	33%
1-3 times a month	29%	38%	26%	26%	25%	30%

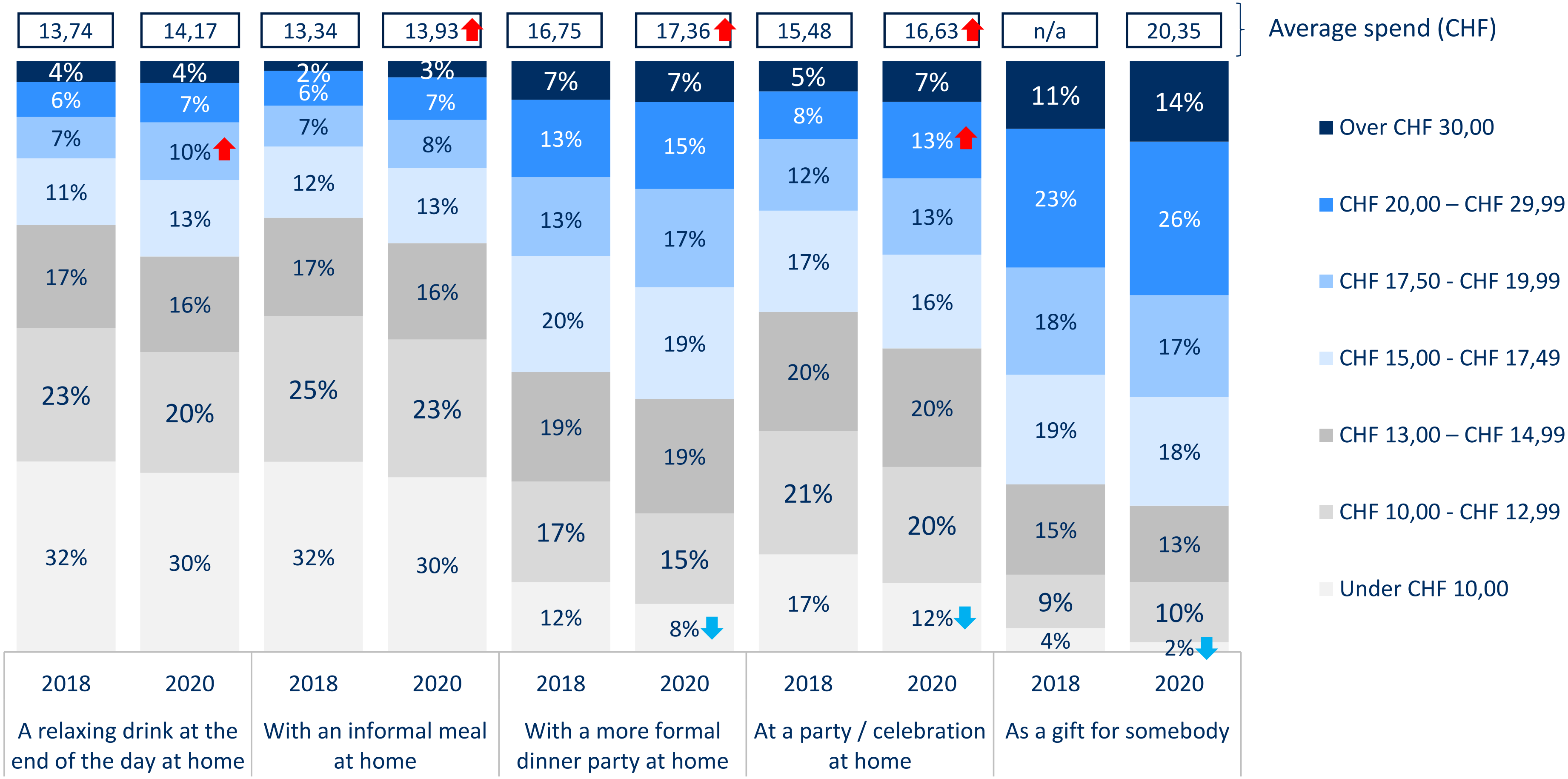
Red / Blue: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
🡅 / 🡇 : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Switzerland, October 2013, March + July 2018 and October 2020 (n≥541) Swiss regular wine drinkers

EXAMPLE SLIDE: OFF-TRADE: SPEND ON WINE BY OCCASION

Average spend per bottle has increased significantly for nearly all off-trade occasions since 2018

Off-trade: Spend on wine by occasion

% who typically spend the following amount on a bottle of wine on each occasion
Base = Those who drink wine on each occasion



: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac® Switzerland, March + July 2018 and October 2020 (n≥700) Swiss regular wine drinkers

RESEARCH METHODOLOGY: QUANTITATIVE

The data was collected in Switzerland since October 2013

The following waves October 2013 and March + July 2018 were tracked against October 2020

Data was gathered via Wine Intelligence's Vinitrac® online survey

Respondents were screened to ensure that they were at least 18 years old; drank red, white or rosé wine at least once a month; and bought 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 shown in the table:

		Oct-13	*Mar-18 + Jul-18*	*Oct-20*
	n=	***541***	***1,500***	***700***
Gender	Male	55%	53%	58%
	Female	45%	47%	42%
	Total	***100%***	***100%***	***100%***
Age	18-24	10%	8%	7%
	25-34	17%	17%	17%
	35-44	20%	19%	18%
	45-54	21%	22%	22%
	55 and over	32%	35%	36%
	Total	***100%***	***100%***	***100%***
Region	Eastern Switzerland	13%	11%	11%
	Zürich	16%	19%	19%
	Central Switzerland + Ticino	10%	14%	13%
	Northwestern Switzerland	13%	12%	13%
	Espace Mittelland	25%	22%	22%
	Région lémanique	23%	22%	22%
	Total	***100%***	***100%***	***100%***

Source: Wine Intelligence, Vinitrac® Switzerland, October 2013 (n=541), Mar+Jul 2018 (n=1,500), and October 2020 (n=700) Swiss regular wine drinkers

RESEARCH METHODOLOGY: QUALITITATIVE

MARKET EXPERT INTERVIEWEES

Trade Interviews were conducted with five experienced industry professionals in the Switzerland wine trade in 2021

Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing

The five interviewees were members of the wine trade working in different roles:

1 x Wine Brand Manager

1 x Wine Producer & Importer

1 x Wine Educator

1 x Hotel Wine Director

1 x Wine Distributor

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