WINE INTELLIGENCE

GERMANY WINE LANDSCAPES 2021

JULY 2021

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INTRODUCTION

As the latest wave of Covid recedes, German wine consumers are emerging with an increased level of confidence compared to last year. They have more intentions to go out for dining and drinking out and are hoping and anticipating to take up normal social behaviours in the near future.

Wine consumption in Germany has increased in 2020 and we see consumers drink more frequently compared to previous years. Domestic as well as imported wines benefited from lockdown, and the momentum appears to have carried over into 2021. This sounds like great news for the wine category, however, there are some clouds on the horizon.

Even though the frequency of consumption increases, off-trade spend is flat – and remains low by international standards. The average per bottle spend for a gift, traditionally the most lavish occasion, remains below €10. On the other hand, when Germans have been able to make it to a bar or restaurant, they are spending a bit more than they used to. Again, this remains low by comparison with other markets – a formal dinner would inspire a bottle worth just €17 on average – but this is €2 more than consumers would spend in 2016 for the same occasion.

For the German wine industry, there is some good news though: consumers are increasingly turning to domestic wine and continue to increase their spend on wine. This change in the very value-driven market, has been accelerated further by the Covid pandemic as consumers are looking for opportunities to treat themselves and wine is their treat of choice. In particular, younger wine drinkers don't mind spending a few extra euros per bottle, but they also expect a more interesting product in return. Brands that deliver a story or innovation continue to have a good standing with those younger consumers, who are looking for a connection with the product.

In this report we have also looked at how consumers are purchasing wine and how they can be influenced in different stages of their decision journey, and how this behaviour varies by purchase channel used. What we see is an opportunity for multichannel shoppers – that is to say, those who shop across supermarkets, specialist retail and online - as they are younger, highly involved wine drinkers who want to be engaged in the category and are looking for multiple touchpoints in all stages of the purchasing process.

EXAMPLE SLIDE: MANAGEMENT SUMMARY

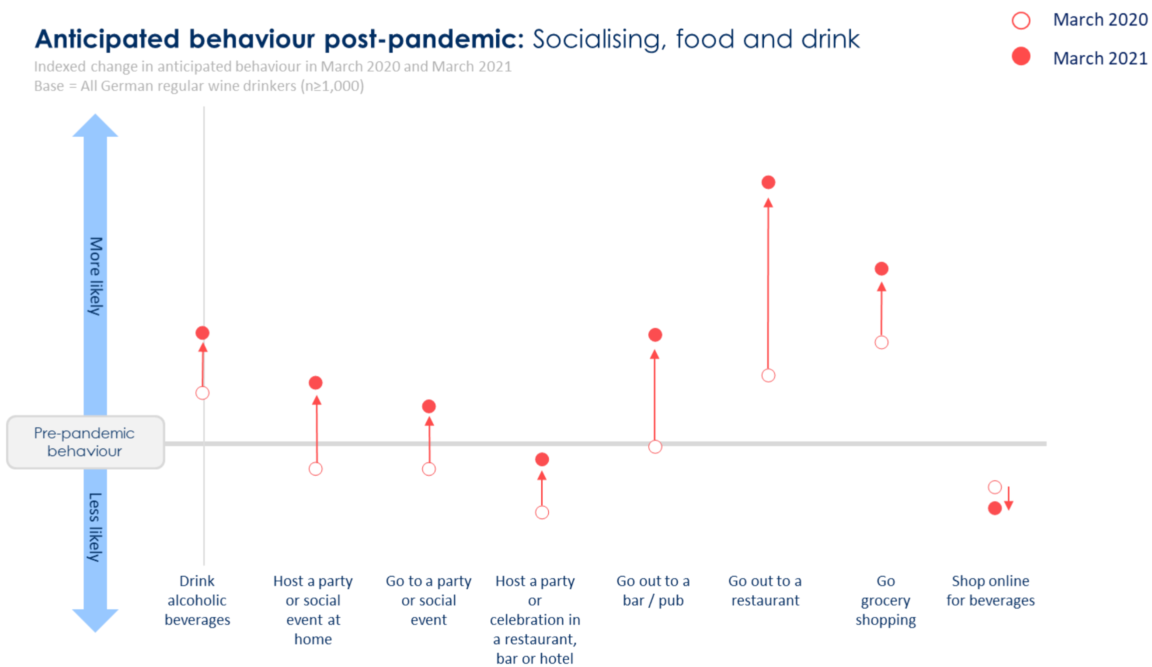
CONFIDENCE RETURNING TO GERMAN WINE DRINKERS

German regular wine drinkers are much more confident about dining and drinking out compared with March 2020

Confidence is returning, with regular wine drinkers more likely to be anticipating certain social behaviours, both compared to March 2020 and pre-pandemic levels. This change is most pronounced with regards to going out to a restaurant and going out to a bar / pub, suggesting pent up demand among German drinkers as COVID-19 restrictions relax

Anticipated behaviour post-pandemic: Socialising, food and drink

Indexed change in anticipated behaviour in March 2020 and March 2021
Base = All German regular wine drinkers (n≥1,000)



EXAMPLE SLIDE: MANAGEMENT SUMMARY

Consumption trends in the German wine market

Top alcoholic beverages

% who have drunk the following beverages in the past 12 months

	2016	2021	
Red wine	88%	84%	↓
White wine	83%	78%	↓
Beer	71%	70%	
Sekt	72%	61%	↓
Rosé wine	56%	43%	↓

Top countries of origin

% who have drunk wine from the following places in the past 6 months

	2016	2021	
Germany	76%	72%	↓
Italy	49%	45%	
France	46%	40%	↓
Spain	33%	31%	
Austria	17%	17%	

Top red varietals

% who have drunk the following varietals or wine types in the past 6 months

	2016	2021	
Dornfelder	52%	45%	↓
Merlot	54%	44%	↓
Cabernet Sauvignon	39%	31%	↓
Pinot Noir	37%	28%	↓
Shiraz / Syrah	18%	18%	

Top white varietals

% who have drunk the following varietals or wine types in the past 6 months

	2016	2021	
Riesling	59%	51%	↓
Chardonnay	45%	39%	↓
Pinot Grigio / Pinot Gris	37%	31%	↓
Müller-Thurgau	40%	30%	↓
Sauvignon Blanc	34%	29%	↓

↑ / ↓ : Statistically significantly higher / lower than the 2016 wave at a 95% confidence level

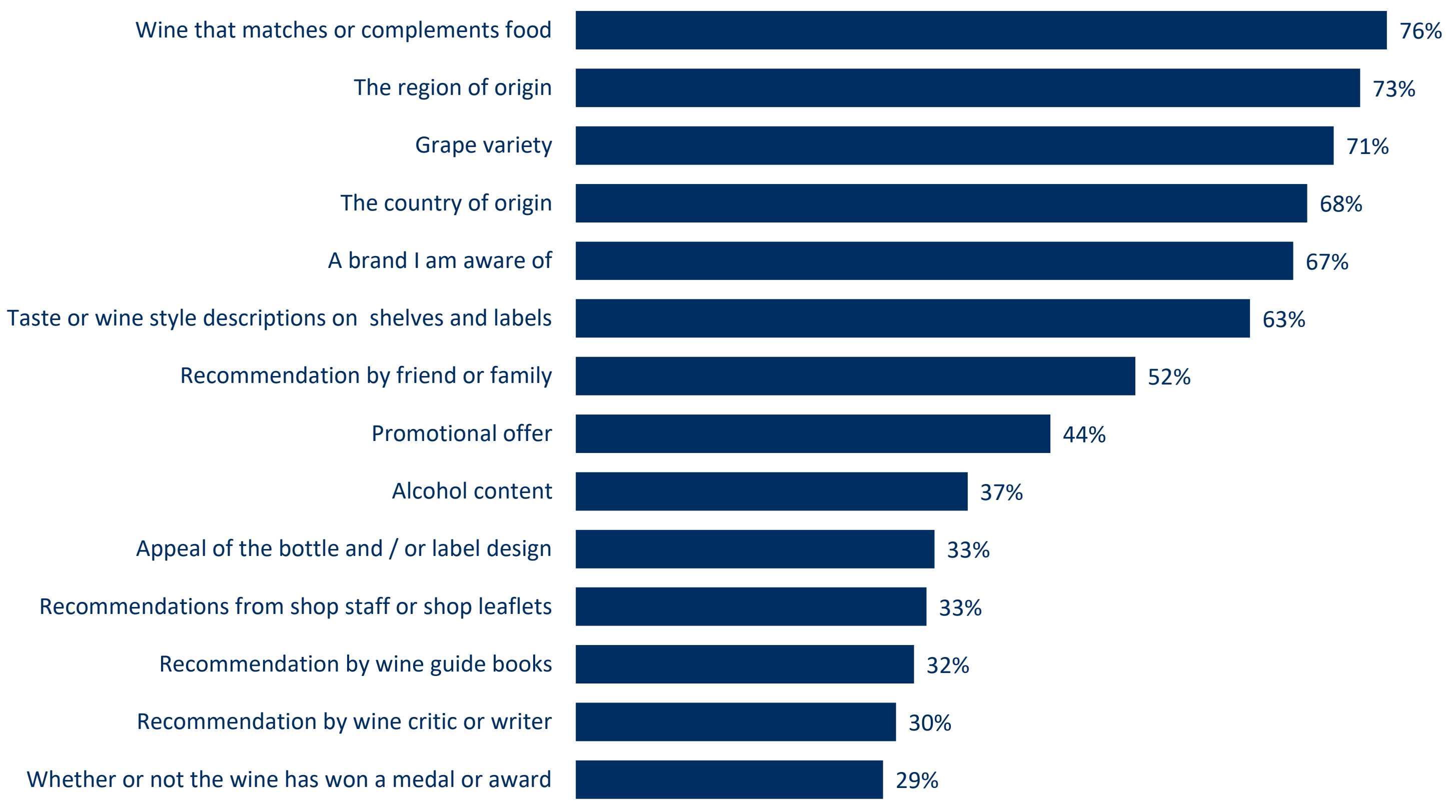
Source: Wine Intelligence, Vinitrac® Germany, March 2016 and March 2021 (n=1,005) German regular wine drinkers

WINE-BUYING CHOICE CUES

Wine pairings with food is an important choice cue for 3 in 4 German drinkers. Region and country of origin, along with grape variety also index highly for regular wine drinkers

Wine-buying choice cues

% who indicate each of the following factors is 'important' or 'very important' when buying wine
Base = All German regular wine drinkers (n=1,005)



Source: Wine Intelligence, Vinitrac® Germany, March 2021 (n=1,005) German regular wine drinkers

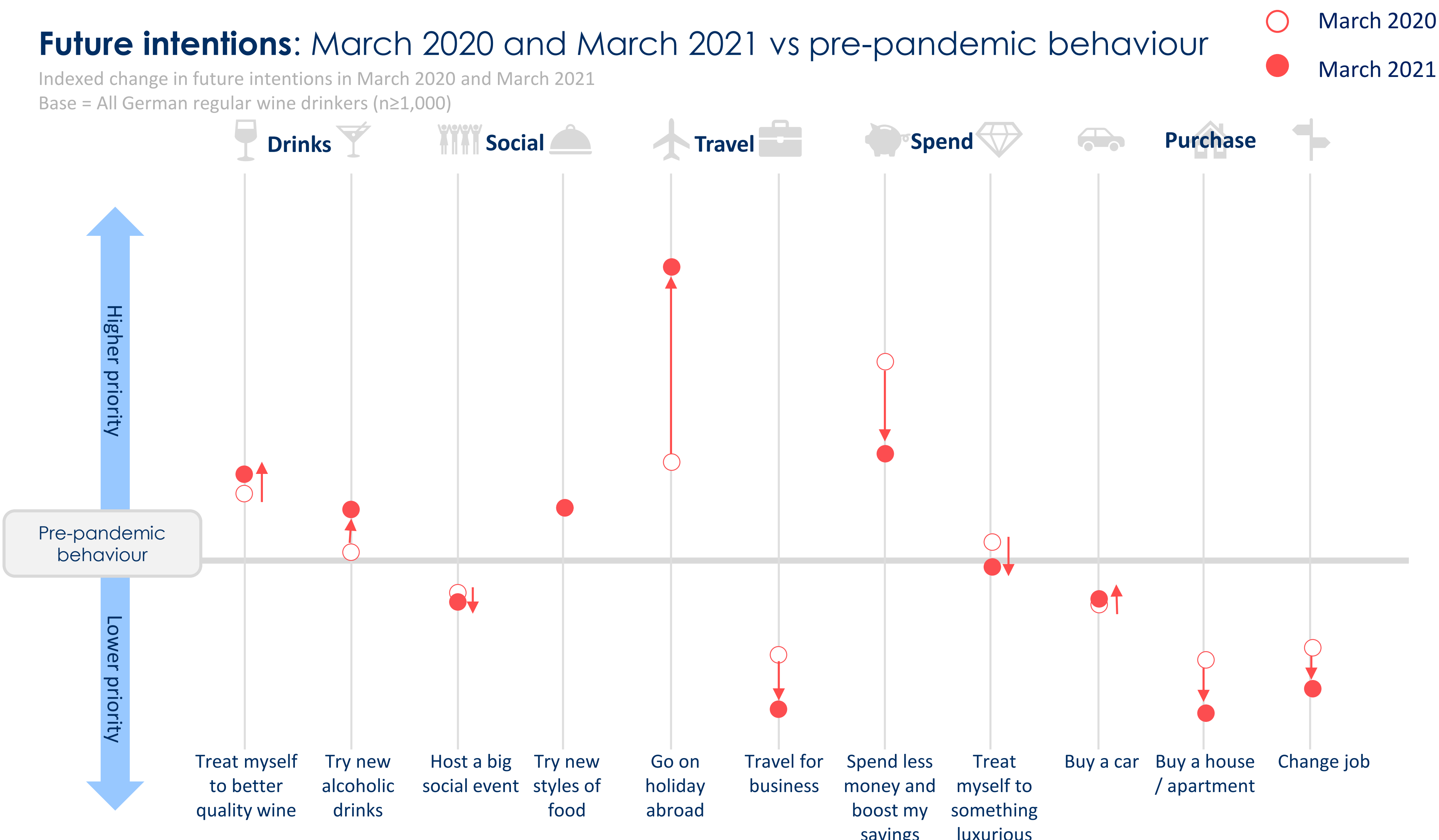
FUTURE BEHAVIOUR PRIORITIES

While intentions to travel appear to be increasing as the pandemic continues, large scale purchases remain a low priority

Future intentions: March 2020 and March 2021 vs pre-pandemic behaviour

Indexed change in future intentions in March 2020 and March 2021

Base = All German regular wine drinkers (n≥1,000)



Source: Wine Intelligence Vinitrac® Germany, March 2020 (3rd April 2020 – 7th April 2020) and March 2021 (24th March 2021 – 5th April 2021), n≥1,000 German regular wine drinkers

RESEARCH METHODOLOGY: QUANTITATIVE

The data was collected in Germany since March 2016

The following waves March 2016, July 2017, March 2018, January 2019, March 2020, July 2020, and January 2021 were tracked against March 2021

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 German regular wine drinkers in terms of gender, age and region

The distribution of the sample is shown in the table:

		Mar-16	Jul-17	Mar-18	Jan-19	Mar-20	Jul-20	Jan-21	Mar-21
	n=	1,005	1,000	1,006	1,014	1,000	1,003	1,000	1,005
Gender	Male	43%	43%	42%	42%	43%	43%	44%	44%
	Female	57%	57%	58%	58%	57%	57%	56%	56%
	Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*
Age	18-24	5%	4%	4%	4%	4%	4%	5%	5%
	25-34	12%	12%	12%	12%	12%	12%	9%	9%
	35-44	18%	16%	16%	16%	16%	16%	12%	12%
	45-54	23%	22%	22%	22%	22%	22%	20%	20%
	55-64	29%	30%	29%	30%	26%	28%	17%	17%
	65 and over	13%	17%	17%	16%	21%	18%	37%	37%
	Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*
Region	Baden-Württemberg	14%	15%	15%	15%	15%	15%	14%	14%
	Bayern	16%	17%	17%	17%	17%	17%	15%	15%
	Berlin	4%	4%	4%	4%	4%	4%	3%	3%
	Brandenburg + Mecklenburg-Vorpommern	6%	5%	4%	5%	5%	5%	5%	5%
	Bremen + Niedersachsen	10%	10%	10%	10%	10%	10%	10%	10%
	Hamburg + Schleswig-Holstein	5%	6%	6%	6%	6%	6%	5%	5%
	Hessen	7%	7%	7%	7%	7%	7%	9%	9%
	Nordrhein-Westfalen	19%	19%	19%	19%	19%	19%	22%	22%
	Rheinland-Pfalz + Saarland	7%	6%	6%	6%	6%	6%	6%	6%
	Sachsen + Sachsen-Anhalt + Thüringen	12%	11%	11%	11%	11%	11%	10%	10%
	Total	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*	*100%*

Source: Wine Intelligence, Vinitrac® Germany, March 2016- March 2021 (n ≥ 1,005) German regular wine drinkers

RESEARCH METHODOLOGY: QUALITITATIVE

MARKET EXPERT INTERVIEWEES

Market Interviews were conducted with four experienced industry professionals in the German 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 four interviewees were wine industry professionals working within the market in different roles:

2 x Wine Producer

1 x Wine Region Association

1 x Wine Retailer

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Wine Intelligence London (Head Office)

109 Maltings Place
169 Tower Bridge Road
London
SE1 3LJ

Telephone: +44 (0)20 8194 0090
Email: info@wineintelligence.com
Website: www.wineintelligence.com
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