wine intelligence

WINE INTELLIGENCE

DENMARK WINE LANDSCAPES

NOVEMBER 2021

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INTRODUCTION

Since our previous Denmark Landscapes report in 2019, the Danish wine market has lost an estimated 17% of its monthly wine drinkers even though the adult population of the country has increased during this time. This could be the effect of moderation, especially amongst younger drinkers, but also competition from other categories such as RTDs.

In terms of the pandemic, Denmark has effectively navigated the situation compared to some of its neighbours thanks to fewer restrictions and an effective vaccination programme. However, after being the first European Union country to remove their Covid-19-related restrictions, rising case numbers have lead to calls for reintroducing measures to ease pressure on the healthcare system. This could lead to restrictions returning for the on-trade which would limit potential and short-term recovery.

Adding to this there is uncertainty amongst younger consumers about their approach to the post-Covid world, especially around their future drinking plans. Four in ten 18-34–year-old monthly wine drinkers anticipate increasing their alcohol consumption, with 23% saying they'll decrease it; suggesting a repertoire reset is taking place amongst them as the pandemic recedes.

German wine, however, seems to be a beneficiary of the pandemic. The country's consumption level has risen significantly since 2017 in Denmark whilst consumption of other origins has declined. We could attribute this to increased accessibility, distribution, and marketing efforts throughout the pandemic, as borders were shut and importing from other origins was limited. Furthermore, the markets' proximity to each other means supply of German wine faced less disruption in the past year compared with sources further away from Denmark. With the ability for Danes to once again cross into Germany to purchase less heavily-taxed alcohol and wine, we could expect this trend to continue within the market.

Supermarkets have also been affected by Covid-19, having lost trade since 2018 as consumers migrated to buying their wine online. Pandemic restrictions such as limitations on the number of people in stores or general hesitations to leave home are likely responsible. However, trade interviewees suggest that supermarkets will bounce back once consumers return to their pre-pandemic behaviours.

Additionally, in terms of shopping attitudes, Danish wine consumers have become increasingly more price-conscious since 2018; they place greater importance on promotional offers when buying wine and have begun to perceive it as an expensive drink. This is in contrast with other markets such as the UK where British regular wine drinkers are showing a propensity to spend more per bottle in both the off- and on-trades, leading to premiumisation of wine that isn't seen as obviously in the Danish market.

MANAGEMENT SUMMARY

KEY TAKEAWAYS FROM DENMARK LANDSCAPES 2021

- Decreasing population of regular wine drinkers in Danish market
- Supermarket usage declining due to the impact of the Covid-19 pandemic and online, but expected to bounce back
- German wine proves to be a success story within the Danish market
- Wine consumption continues to be driven by mature wine drinkers
- Over a quarter of regular Danish wine drinkers now purchase their wine online
- Younger consumers anticipate return to higher alcohol consumption – but not necessarily wine

MANAGEMENT SUMMARY

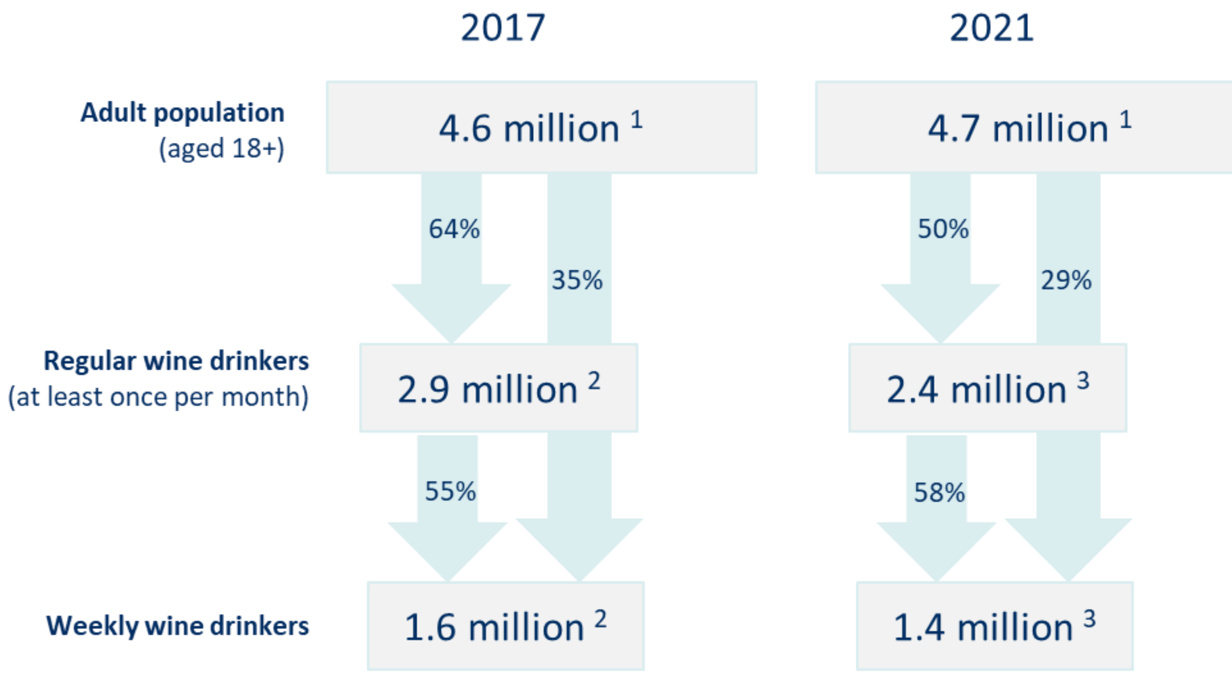
DECREASING POPULATION OF REGULAR WINE DRINKERS

The number of monthly wine drinkers in Denmark has declined since 2017

Our estimate of the number of regular (monthly+) wine drinkers in Denmark has declined by 14% since 2017 though the population of Danish adults has grown slightly.

This is potentially a result of alcohol moderation and competition from other beverage categories.

Wine Drinkers in the Danish Market



1 Danmarks Statistikbank
2 Wine Intelligence online calibration study with YouGov, Feb '17, n=1,015 Danish adults. Wine=still light wine (red, white, rosé)
3 Wine Intelligence online calibration study with YouGov, Feb '21, n=1,042 Danish adults. Wine=still light wine (red, white, rosé)

MANAGEMENT SUMMARY

WINE CONSUMPTION DRIVEN BY MATURE WINE DRINKERS

55+-year-olds drink the most often of all age groups and now make up over half of the Danish wine drinking population

A trend we mentioned in our previous 2019 version of Denmark Landscapes, the Danish wine market continues to be driven by mature drinkers. This group of older consumers are the most frequent wine drinkers (16% drink most days / every day compared with 11% of RWD) and are driving the increase in consumption frequency seen since 2017.

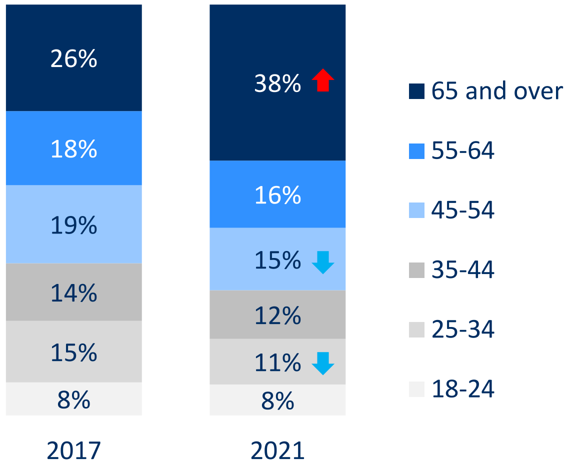
They have also grown in size, from 44% of all RWD to now making up over half (54%) as younger, infrequent wine drinkers leave the category.

Wine consumption frequency: by age

% who usually drink wine at the following frequency
Base = All Danish regular wine drinkers (n=1,000)

		Age groups		
	All Danish regular wine drinkers	18-34	35-54	55+
n=	*1,000*	*186*	*270*	*544*
Most days / every day	11%	4%	8%	16%
2-5 times a week	31%	30%	27%	33%
About once a week	31%	38%	37%	26%
1-3 times a month	27%	28%	29%	25%

Age



Red / Blue: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2021, (n=1,000), Danish regular wine drinkers

MANAGEMENT SUMMARY

SUPERMARKETS LOSING TRADE DUE TO COVID

Number of consumers using regular and discount supermarkets to buy wine has significantly decreased as a result of the pandemic

Nearly three quarters of Danish consumers bought wine from supermarkets in 2018, with the proportion down to 62% in 2021. Pandemic restrictions such as limitations on number of people in stores or general hesitations to leave home are likely responsible.

We have also seen growth in ecommerce, with over a quarter (28%) of Danish regular wine drinkers purchasing their wine online. 2 in 5 said they have shopped more often from an online retailer in the past 6 months compared with their pre-pandemic behaviour.

Trade members, however, suggest the supermarket channel will bounce back once consumers resume their pre-pandemic behaviours.

Wine-buying channel usage: Tracking

% who have bought wine from the following channels in the past 6 months
Base = All Danish regular wine drinkers (n=1,000)

Rank		2017	2018	2021	Tracking	
2021	n=	*1,000*	*1,000*	*1,000*	vs. '17	vs. '18
1	In a supermarket	72%	72%	62%	⬇	⬇
2	From a wine merchant	30%	26%	26%	➡	➡
3=	In an off license	21%	20%	18%	➡	➡
3=	In a discount supermarket	21%	22%	18%	➡	⬇
5	From shopping abroad	27%	26%	17%	⬇	⬇
6	From an online retailer	n/a	n/a	16%		
7	In a hypermarket	9%	12%	13%	⬆	➡
8	From a supermarket / hypermarket website	n/a	n/a	12%		
9	In a department store	11%	10%	11%	➡	➡
10	Directly from wine producer	6%	4%	7%	➡	⬆
11=	From a winery during a visit	n/a	n/a	6%		
11=	From Duty Free (eg airports)	8%	6%	6%	➡	➡
13	From a delivery app	n/a	n/a	5%		

Red / Blue: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
⬆ / ⬇ : Statistically significantly higher / lower than the 2018 wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2018, July 2021, (n=1,000), Danish regular wine drinkers

WHAT DO MARKET EXPERTS SAY?

"Sales and consumption during COVID have basically been just shifted online and people have picked up from the supermarkets that were allowed to remain open. But it appears that people are slowly beginning now to come back to the bigger shopping centres and resuming their patterns from pre-COVID times."

Wine Educator, Denmark

MANAGEMENT SUMMARY

GERMAN WINE EXPERIENCING COVID-ERA SUCCESS

German wines are experiencing an increase in consumption whilst other origins see declines

Though from a lower base compared with other, more popular origins, the proportion of Danish consumers who have bought wine from Germany over the past 6 months has increased significantly since 2017 whilst consumption of other origins has declined.

The declines can be attributed to lower category knowledge compared to previous years, but the specific increase in Germany may be linked to increased accessibility, distribution and marketing efforts. The proximity of the two countries could also mean supply of German wine faced less disruption in the past year than other, more distant source countries.

Country of origin **consumption**: Tracking

% who have drunk wine from the following places in the past 6 months
Base = All Danish regular wine drinkers (n=1,000)

Rank		2017	2018	2021	Tracking	
2021	*n=*	*1,000*	*1,000*	*1,000*	vs. '17	vs. '18
1	Italy	56%	56%	53%	→	→
2	France	50%	47%	48%	→	→
3	Spain	42%	37%	37%	↓	→
4	Chile	47%	46%	34%	↓	↓
5	California - USA	26%	32%	29%	→	→
6	South Africa	39%	37%	27%	↓	↓
7=	Australia	32%	34%	26%	↓	↓
7=	Germany	21%	20%	26%	↑	↑
9	Argentina	21%	17%	16%	↓	→
10	Portugal	12%	14%	14%	→	→
11	New Zealand	8%	9%	11%	↑	→
12	Other USA (outside of California)	3%	5%	5%	→	→
13	Switzerland	2%	2%	3%	→	→

Red / Blue: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
↑ / ↓ : Statistically significantly higher / lower than the 2018 wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2018, July 2021, (n=1,000), Danish regular wine drinkers

WHAT DO MARKET EXPERTS SAY?

Market experts emphasise the role of German wine within the Danish market

"German wine is a very big deal up here, and has been for eons of time. After all Germany is well, pretty much, our most important trading partner, historically"

Wine Educator , Denmark

MANAGEMENT SUMMARY

COVID: Younger drinkers net more likely to drink in future, but more polarised

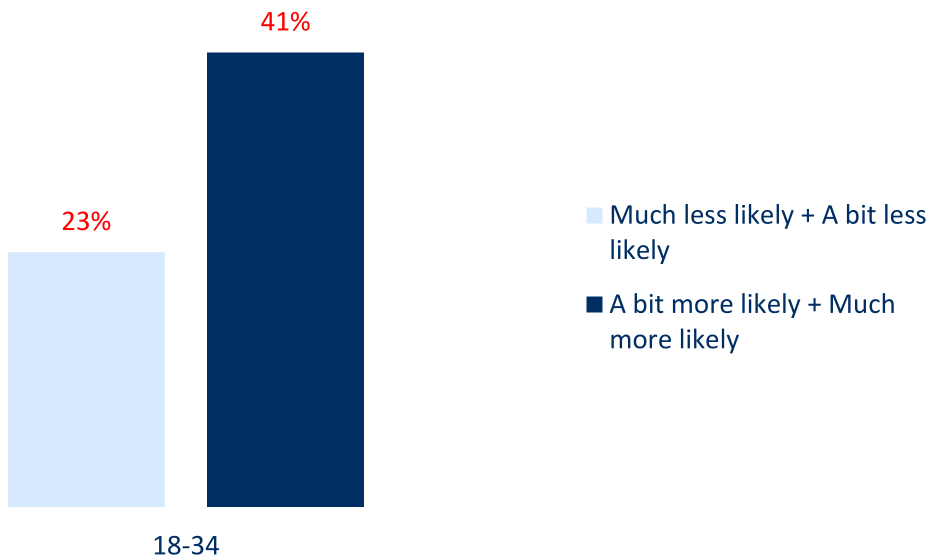
Younger consumers (aged 18-34) are showing higher levels of volatility in terms of future drinking plans, suggesting a repertoire reset is taking place as the pandemic recedes

4 in 10 18-34-year-old monthly wine drinkers anticipate increasing their alcohol consumption, with 23% saying they'll decrease it.

In terms of anticipated future wine-specific purchases, 16% of 18-34-year-olds (vs 9% of RWD) expect to buy more wine and 26% (vs 14% of RWD) expect to purchase less, suggesting that the post-pandemic reset will favour other categories rather than wine

Anticipated change in drinking alcoholic beverages after Covid-19

Change in anticipated behavior in July 2021
Base = All Danish regular wine drinkers (n=1,000)



Red / Blue: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2021, (n=1,000), Danish regular wine drinkers

MANAGEMENT SUMMARY

Consumption trends in the Danish wine market

Top alcoholic beverages

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

	2017	2021
Red wine	88%	88%
White wine	82%	81%
Beer	73%	72%
Rosé wine	58%	67% ↑
Craft beer	45%	47%

Top countries of origin

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

	2017	2021
Italy	56%	53%
France	50%	48%
Spain	42%	37% ↓
Chile	47%	34% ↓
California - USA	26%	29%

Top red varietals

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

	2017	2021
Cabernet Sauvignon	55%	48% ↓
Merlot	54%	44% ↓
Zinfandel	27%	36% ↑
Pinot Noir	38%	36%
Shiraz / Syrah	40%	35% ↓

Top white varietals

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

	2017	2021
Chardonnay	55%	50% ↓
Sauvignon Blanc	41%	40%
Riesling	38%	35%
Pinot Grigio / Pinot Gris	28%	26%
Moscato	18%	16%

↑ / ↓ : Statistically significantly higher / lower than the 20xx wave at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, July 2017, July 2021, (n=1,000), Danish regular wine drinkers

Purchase trends in the Danish wine market

wine intelligence

Top wine-buying channels

% who have bought wine from the following channels in the past 6 months

	2017	2021	
In a supermarket	72%	62%	↓
From a wine merchant	30%	26%	
In an off license	21%	18%	
In a discount supermarket	21%	18%	
From shopping abroad	27%	17%	↓

Top wine-buying retailers

% who mainly use the following retailers to buy wine

	2017	2021	
Rema 1000	16%	22%	↑
SuperBrugsen	21%	21%	
Netto	21%	19%	
Føtex	24%	19%	↓
Kvickly	20%	16%	↓

Top brands

% who have bought the following brands in the past 3 months

	2018	2021	
SAVANHA	16%	11%	↓
Casillero del Diablo	14%	10%	↓
HARDYS	12%	9%	↓
[yellow tail]	10%	9%	
BAREFOOT	n/a	9%	

Top wine-buying choice cues

% who indicate each of the following factors is 'important' or 'very important' when buying wine

	2017	2021	
Wine that matches or complements food	79%	78%	
Grape variety	60%	61%	
The country of origin	60%	61%	
Taste / wine style descriptions	63%	60%	
Promotional offer	53%	60%	↑

↑ / ↓ : Statistically significantly higher / lower than the 20xx wave at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, July 2017, July 2018, July 2021, (n=1,000), Danish regular wine drinkers

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THE DANISH WINE MARKET

Wine Intelligence Compass 2021 Report

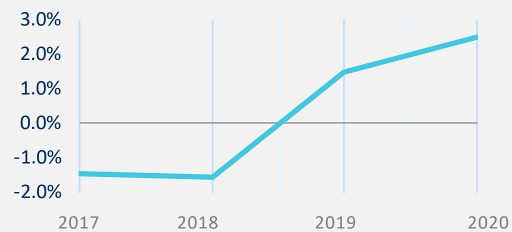
Overview of the Danish wine market

WINE MARKET SUMMARY:

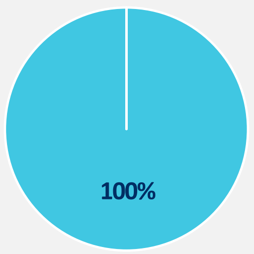
25th largest wine market

Total wine consumption:	17,280	'000 9l cases of still light wine
Long-term trend 2016-20:	0.24%	CAGR 2016-20
Per capita consumption:	26.5	litres per year (still light wine)
Imported wine consumption:	17,280	'000 9l cases of still light wine
Share of imported wine:	100%	

Wine volume growth rates:



Share of imported wine:

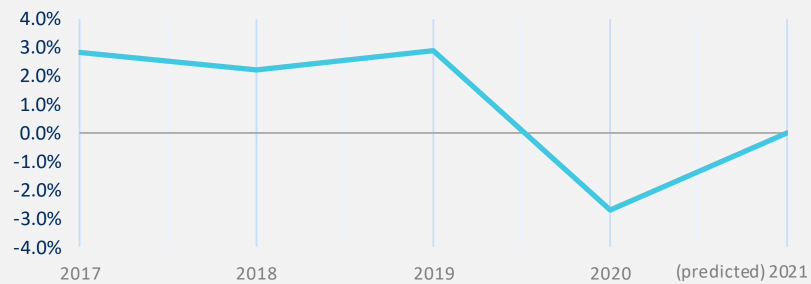


Sources: IWSR, Wine Intelligence Calibration studies, Wine Intelligence Vinitrac®, Wine Intelligence market experience

ECONOMIC SUMMARY:

Adult population:	4.7	Million
GDP/capita:	$ 63,880	Dollars
GDP long-term trend:	1.67%	Average growth 2016-20
GNI/capita:	$ 62,720	Dollars
Unemployment rate:	5.6%	
Corruption index:	88	0 to 100 (100 = no corruption)
Comparative globalisation index:	88	1 to 100 (100 = very globalised)
Predicted 2021 GDP:	2.76%	

GDP growth rates:



Sources: The IWSR, World Bank, IMF, United Nations, International Monetary Fund, Transparency International, KOF Globalisation Index

Interested in the Wine Intelligence **Global Compass 2021** report? Click here for more information

Source: Wine Intelligence Global Compass report 2021

THE DANISH WINE MARKET

Wine Intelligence Compass 2021 Report

MATURE	ESTABLISHED	GROWTH	EMERGING	NEW EMERGING
Markets where wine appears to have reached its potential with stable or declining volumes	Markets with strong historical growth which is tailing off	Markets where wine is a mainstream product and / or experiencing growth	Markets where wine is experiencing growth and shows potential from a relatively low base	Markets where wine is still a relatively new and unknown beverage, but showing potential
Argentina (35) Australia (18) Austria (24) Belgium & Luxembourg (18) Chile (37) Denmark (9) France (16) Germany (5) Netherlands (13) Norway (6) Slovakia (33) Spain (25) Sweden (8) Switzerland (10) United Kingdom (3)	Canada (7) Czech Republic (28) Finland (18) Greece (42) Hong Kong (30) Hungary (29) Ireland (4) Italy (25) Japan (21) New Zealand (23) Portugal (32) Slovenia (38) South Africa (49) United States (1)	Brazil (14) Colombia (27) Poland (12) Romania (15) South Korea (2) Singapore (11)	Angola (50) China (17) Mexico (31) Peru (41) Taiwan (36) Turkey (34) United Arab Emirates (44) Russia (22)	India (47) Indonesia (48) Malaysia (40) Nigeria (39) Philippines (43) Thailand (45) Vietnam (46)

() Rank by attractiveness
() Top 10 most attractive wine markets in the world
Wine Intelligence Global Wine Market Attractiveness model 2021

IMPORTED VS. DOMESTIC STILL WINE MARKET

Still wine volumes have increased in Demark since 2018, driven rebounds in imports from US and Australia; Germany had a strong 2020

Denmark **still wine** volumes and price per bottle (total and by country of origin)

Thousands of 9 litre cases	2016	2017	2018	2019	2020	CAGR 16-20	CAGR 19-20	Market share	Retail price per 0.75L 2020 (US$)	CAGR 16-20	CAGR 19-20
Total	17,118	16,866	16,606	16,855	17,280	0%	3%	100%	11.61	1%	-1%
Domestic	0	0	0	0	0	-	-	0%		-	-
Imported	17,118	16,866	16,606	16,855	17,280	0%	3%	100%	11.61	1%	-1%
Italian	2,976	3,019	3,054	3,110	3,048	1%	-2%	18%	14.47	1%	1%
French	2,829	2,836	2,824	2,865	2,915	1%	2%	17%	12.03	1%	0%
Chilean	2,572	2,516	2,417	2,546	2,467	-1%	-3%	14%	12.12	2%	-2%
Australian	2,498	2,165	1,942	2,094	2,401	-1%	15%	14%	9.40	2%	0%
Spanish	2,240	2,273	2,323	2,391	2,195	-1%	-8%	13%	12.86	1%	1%
US	891	909	930	976	1,300	10%	33%	8%	10.21	0%	0%
German	901	918	939	864	942	1%	9%	5%	7.33	1%	0%
Argentinian	699	711	718	719	789	3%	10%	5%	10.27	3%	4%
South African	1,157	1,113	1,024	831	752	-10%	-10%	4%	9.98	-2%	-2%
Portuguese	194	203	218	235	255	7%	9%	1%	6.94	2%	0%
New Zealand	94	135	148	159	168	16%	6%	1%	16.01	1%	1%
Austrian	19	20	21	24	21	3%	-13%	0%	11.35	1%	0%
Romanian	21	22	23	19	9	-19%	-51%	0%	6.88	2%	0%
Hungarian	11	12	13	11	7	-11%	-36%	0%	10.44	2%	0%
International	6	6	6	6	7	4%	8%	0%	9.63	2%	0%
Greek	9	7	5	4	4	-18%	0%	0%	7.64	3%	0%
Bulgarian	2	2	2	2	1	-16%	-50%	0%	7.57	2%	0%

IMPORTED VS. DOMESTIC SPARKLING AND FORTIFIED WINE MARKET SHARE

Unlike still wine, sparkling wine volume has decreased in Denmark over the past year, likely a result of reduced social occasions. German sparkling was the only sub-category that grew in 2020

Denmark **sparkling wine** volumes and price per bottle (total and by country of origin)

Thousands of 9 litre cases	2016	2017	2018	2019	2020	CAGR 16-20	CAGR 19-20	Market share	Retail price per 0.75L 2020 (US$)	Retail price CAGR 16-20	Retail price CAGR 19-20
Total	609	637	658	673	633	1%	-6%	100%	16.23	2%	1%
Domestic	0	0	0	0	0	-	-	0%		-	-
Imported	609	637	658	673	633	1%	-6%	100%	16.23	2%	1%
French	211	216	218	218	212	0%	-3%	34%	24.96	2%	0%
Italian	165	187	191	192	177	2%	-8%	28%	12.57	2%	2%
Spanish	155	159	172	185	167	2%	-10%	26%	10.82	1%	-1%
German	45	41	40	42	46	1%	9%	7%	12.06	1%	-3%
Chilean	9	10	11	11	10	3%	-10%	2%	11.86	1%	-1%
Australian	17	15	13	12	10	-12%	-17%	2%	11.78	2%	0%

Denmark **fortified wine** volumes and price per bottle (total and by country of origin)

Thousands of 9 litre cases	2016	2017	2018	2019	2020	CAGR 16-20	CAGR 19-20	Market share	Retail price per 0.75L 2020 (US$)	Retail price CAGR 16-20	Retail price CAGR 19-20
Total	103	99	100	101	104	0%	2%	100%	13.12	6%	-1%
Domestic	0	0	0	0	0	-	-	0%		-	-
Imported	103	99	100	101	104	0%	2%	100%	13.12	6%	-1%
Portuguese	85	81	83	85	87	1%	3%	84%	13.07	6%	-1%
Spanish	14	14	13	13	13	-1%	2%	13%	13.49	6%	2%
Cypriot	4	4	3	3	3	-7%	0%	3%	12.69	3%	0%

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PER CAPITA CONSUMPTION OF STILL LIGHT WINE

Per capita still light wine consumption has increased in Denmark in 2020 as other top 10 origins by consumption experienced substantial declines

Per capita consumption of **still light wine** (red, white and rosé wine) in litres per annum

	Market	2016	2017	2018	2019	2020	CAGR 16-20	CAGR 19-20
1	Italy	37.6	38.5	38.2	37.2	35.8	-1.2%	-3.8%
2	Portugal	39.1	40.6	39.8	39.7	33.2	-4.0%	-16.3%
3	Slovenia	35.6	36.0	36.1	36.4	31.1	-3.3%	-14.6%
4	Switzerland	32.3	31.7	31.2	30.9	30.6	-1.4%	-1.1%
5	Montenegro	34.8	34.7	34.5	34.5	30.2	-3.5%	-12.4%
6	France	35.1	34.6	33.3	32.2	29.2	-4.5%	-9.4%
7	Denmark	26.9	26.3	25.7	26.0	26.5	-0.3%	2.0%
8	Austria	27.7	27.3	27.1	26.9	26.4	-1.2%	-1.9%
9	Hungary	25.9	26.1	26.3	26.4	25.5	-0.3%	-3.4%
10	Germany	24.7	24.7	24.0	23.9	24.6	-0.1%	2.9%
11	Greece	26.8	27.2	27.7	27.9	21.0	-5.9%	-24.7%
12	Uruguay	19.2	18.8	18.8	18.4	20.5	1.6%	11.3%
13	Argentina	20.9	20.2	19.2	19.0	20.3	-0.7%	6.7%
14	Romania	17.3	20.5	25.0	18.9	19.9	3.7%	5.6%
15	US Virgin Islands	23.4	24.1	24.5	23.3	19.7	-4.2%	-15.3%
16	Sweden	18.1	17.9	17.9	17.8	19.3	1.6%	8.4%
17	Slovakia	19.5	19.2	19.3	19.1	18.7	-1.0%	-2.1%
18	Netherlands	19.5	19.5	19.1	18.7	18.3	-1.6%	-2.1%
19	Serbia	17.5	17.7	18.1	18.1	17.9	0.6%	-1.4%
20	Australia	19.9	19.6	18.9	18.5	17.8	-2.7%	-3.6%

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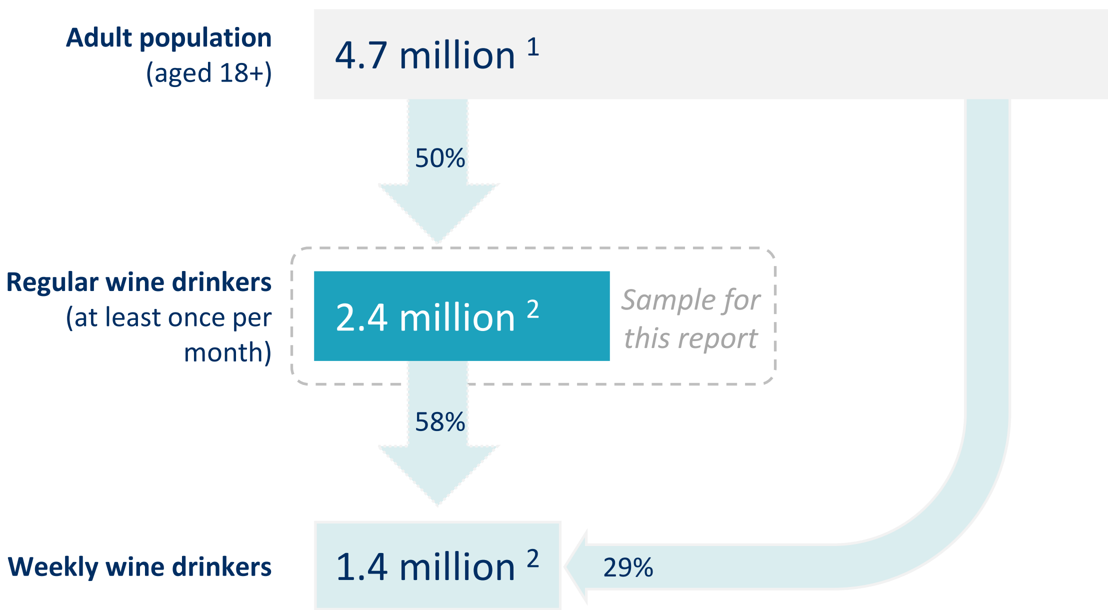
OVERVIEW OF WINE DRINKERS IN THE DANISH MARKET 2021

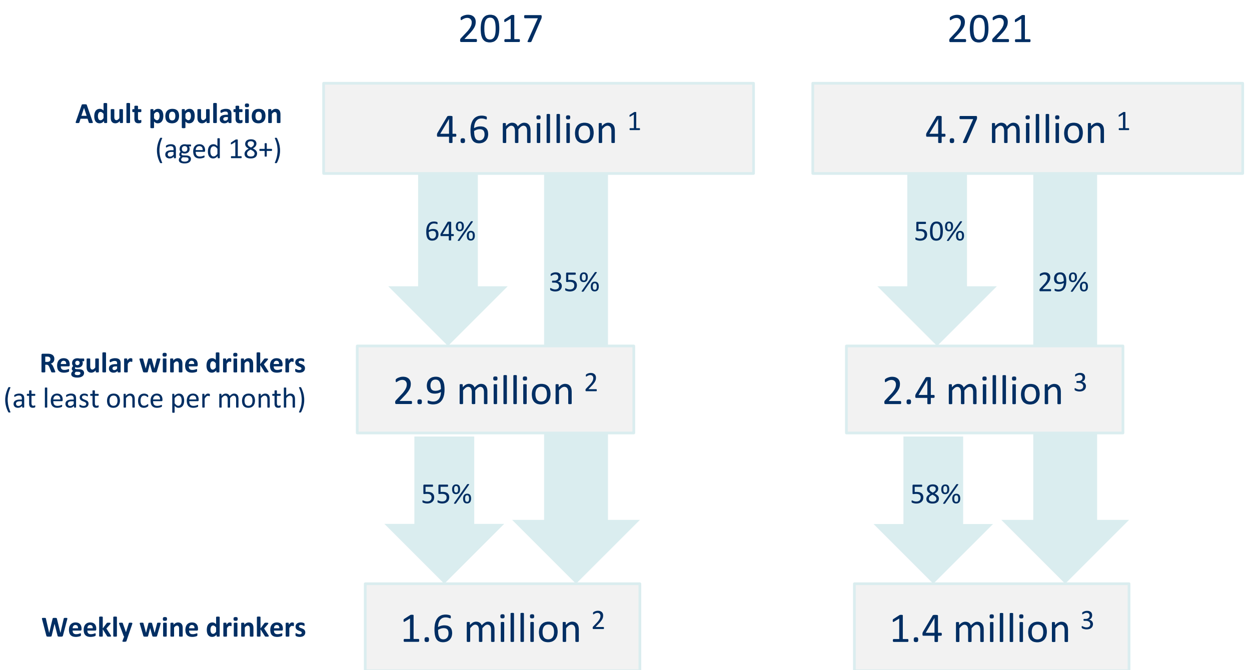
Over a quarter of adults in Denmark drink wine at least once per week



1 Danmarks Statistikbank
2 Wine Intelligence online calibration study with YouGov, Feb '21, n=1,042 Danish adults. Wine=still light wine (red, white, rosé)

CHANGES IN THE DANISH WINE DRINKING POPULATION

The number of monthly and weekly wine drinkers in Denmark has declined since 2017 despite an increase in the total adult population



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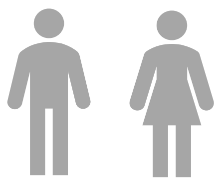
3 Wine Intelligence online calibration study with YouGov, Feb '21, n=1,042 Danish adults. Wine=still light wine (red, white, rosé)

DEMOGRAPHICS OF DENMARK WINE REGULAR WINE DRINKERS

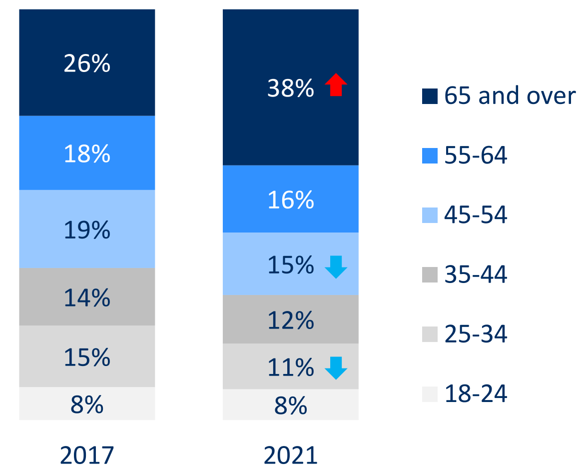
Danish wine consumers skew older (65+), more affluent (800.000kr.+) and more live in the Hovedstaden region (encompassing Copenhagen) compared with 2017

Gender



2021	51%	49%
2017	53%	47%

Age



Regions

	2017	2021
Hovedstaden	25%	31% ⬆
Midtjylland	20%	22%
Nordjylland	10%	11%
Sjælland	19%	16%
Syddanmark	25%	19% ⬇

Total household income (before tax)

	2017	2021
Under 100.000 kr.	3%	2%
100.000kr.	4%	4%
150.000kr.	6%	6%
200.000kr.	14%	14%
300.000kr.	16%	17%
400.000kr.	13%	12%
500.000kr.	9%	9%
600.000kr.	7%	7%
700.000kr.	8%	6%
800.000 kr. +	7%	11% ⬆
Prefer not to answer	14%	12%

⬆ / ⬇ : Statistically significantly higher / lower than the 2017 wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2021, (n=1,000), Danish regular wine drinkers

WINE CONSUMPTION FREQUENCY

Infrequent wine drinkers are leaving the category, with long-term growth in those drinking wine multiple times per week

Wine consumption frequency: Tracking

% who usually drink wine at the following frequency
Base = All Danish regular wine drinkers (n=1,000)

	2017	2018	2021	Tracking	
n=	*1,000*	*1,000*	*1,000*	vs. '17	vs. '18
Most days / every day	11%	10%	11%	→	→
2-5 times a week	26%	28%	31%	↑	→
About once a week	28%	28%	31%	→	→
1-3 times a month	35%	34%	27%	↓	↓

WHAT DO MARKET EXPERTS SAY?

Market experts emphasise the frequency of consumption amongst older consumers in the Danish market

"Consumers aged 50+ are where you have both the money, the willingness, and maybe also when you look at the people close to retirement, they are also the ones who have the time that allows them to drink more wine on a daily basis."

Wine Importer, Denmark

Wine consumption frequency by age

% who usually drink wine at the following frequency
Base = All Danish regular wine drinkers (n= 1,000)

	All Danish regular wine drinkers	Age groups		
		18-34	35-54	55+
n=	*1,000*	*186*	*270*	*544*
Most days / every day	11%	4%	8%	16%
2-5 times a week	31%	30%	27%	33%
About once a week	31%	38%	37%	26%
1-3 times a month	27%	28%	29%	25%

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®, July 2017, July 2018, July 2021, (n1=000), Danish regular wine drinkers

ATTITUDES TOWARDS WINE

Danish wine drinkers have become more price-conscious since 2017, and this is particularly true of consumers under the age of 55

Attitude towards wine: Tracking

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

	2017	2018	2021	Tracking	
n=	*1,000*	*1,000*	*1,000*	vs. '17	vs. '18
I enjoy trying new and different styles of wine on a regular basis	52%	53%	49%	→	→
I don't mind what I buy so long as the price is right	11%	14%	18%	↑	↑
I know what I like and I tend to stick to what I know	37%	33%	33%	↓	→

Attitudes towards wine by age

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

	All Danish regular wine drinkers	Age groups		
		18-34	35-54	55+
n=	*1,000*	*186*	*270*	*544*
I enjoy trying new and different styles of wine on a regular basis	49%	55%	56%	44%
I don't mind what I buy so long as the price is right	18%	29%	26%	10%
I know what I like and I tend to stick to what I know	33%	16%	18%	46%

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®, July 2017, July 2018, July 2021, (n1=000), Danish regular wine drinkers

INVOLVEMENT AND PERCEIVED EXPERTISE IN WINE

In line with more Danish consumers saying they don't mind what they buy if the price is right, a higher proportion of them also find wine to be an expensive drink compared with 2017

Involvement and perceived expertise in wine: Tracking

% who 'agree' or 'strongly agree' with the following statements
Base = All Danish regular wine drinkers (n=1,000)

Rank 2021	*n=*	2017 *1,000*	2018 *1,000*	2021 *1,000*	Tracking vs. '17	Tracking vs. '18
1	Drinking wine gives me pleasure	84%	84%	82%	➡	➡
2	I always look for the best quality wines I can get for my budget	63%	58%	62%	➡	➡
3	Deciding which wine to buy is an important decision	57%	52%	55%	➡	➡
4	Generally speaking, wine is reasonably priced	50%	48%	50%	➡	➡
5	I like to take my time when I purchase a bottle of wine	48%	48%	48%	➡	➡
6	I have a strong interest in wine	37%	36%	42%	⬆	⬆
7	Compared to others, I know less about the subject of wine	31%	30%	35%	➡	⬆
8=	Generally speaking, wine is an expensive drink	26%	29%	34%	⬆	⬆
8=	I don't understand much about wine	32%	33%	34%	➡	➡
10	Wine is important to me in my lifestyle	29%	30%	32%	➡	➡
11	I feel competent about my knowledge of wine	26%	26%	31%	⬆	⬆

⬆ / ⬇ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2018, July 2021, (n1=000), Danish regular wine drinkers

INVOLVEMENT AND PERCEIVED EXPERTISE IN WINE

Under-55's are driving the perception that wine is an expensive drink

Involvement and perceived expertise in wine by age

% who 'agree' or 'strongly agree' with the following statements
Base = All Danish regular wine drinkers (n=1,000)

Rank 2021	n=	All Danish regular wine drinkers	Age groups 18-34	35-54	55+
		1,000	*186*	*270*	*544*
1	Drinking wine gives me pleasure	82%	69%	77%	90%
2	I always look for the best quality wines I can get for my budget	62%	55%	61%	64%
3	Deciding which wine to buy is an important decision	55%	47%	53%	59%
4	Generally speaking, wine is reasonably priced	50%	47%	50%	52%
5	I like to take my time when I purchase a bottle of wine	48%	46%	55%	44%
6	I have a strong interest in wine	42%	46%	46%	39%
7	Compared to others, I know less about the subject of wine	35%	45%	42%	28%
8=	Generally speaking, wine is an expensive drink	34%	43%	42%	28%
8=	I don't understand much about wine	34%	40%	41%	28%
10	Wine is important to me in my lifestyle	32%	32%	42%	27%
11	I feel competent about my knowledge of wine	31%	35%	42%	25%

Red / Blue: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2021, (n1=000), Danish regular wine drinkers

WINE INVOLVEMENT

Wine involvement has remained stable since 2017 in the Danish wine market

Wine involvement: Tracking

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

	2017	2018	2021	Tracking	
n=	*1,000*	*1,000*	*1,000*	vs. '17	vs. '18
High involvement	36%	36%	39%	➡	➡
Medium involvement	29%	29%	30%	➡	➡
Low involvement	35%	35%	31%	➡	➡

Wine involvement is calculated using the following statements:

1. I have strong interest in wine
2. I like to take my time when I purchase a bottle of wine
3. Wine is important to me in my lifestyle
4. Drinking wine gives me pleasure

Wine involvement by age

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

		Age groups		
	All	18-34	35-54	55+
n=	*1,000*	*186*	*270*	*544*
High involvement	39%	38%	45%	36%
Medium involvement	30%	23%	29%	33%
Low involvement	31%	38%	26%	31%

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®, July 2017, July 2018, July 2021, (n1=000), Danish regular wine drinkers

WINE CONFIDENCE AND KNOWLEDGE INDEX

Despite greater interest in and self-reported knowledge of the wine category, knowledge and confidence values have remained stable overall since 2017

Wine **knowledge** index: Tracking

Wine knowledge index (0-100) is calculated based on consumer-reported awareness of wine-producing countries, wine-growing regions and wine brands
Base = All Danish regular wine drinkers (n=1,000)

Group	2017	Index change	2021
All Danish regular wine drinkers	47.4	+0.9	48.3

Wine knowledge index is the **"objective"** measurement of consumer knowledge about wine

Wine **confidence** index: Tracking

Wine confidence index (0-100) is calculated based on the extent to which consumers feel competent about their wine knowledge
Base = All Danish regular wine drinkers (n=1,000)

Group	2017	Index change	2021
All Danish regular wine drinkers	33.2	-0.8	32.4

Wine confidence index is the **"subjective"** measurement of consumer confidence about their wine knowledge

Wine confidence index uses consumers' answers to three attitudinal statements:

1. I feel competent about my knowledge of wine
2. Compared to others, I know less about the subject of wine
3. I don't understand much about wine

↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2021, (n1=000), Danish regular wine drinkers

CONTENTS

ALCOHOLIC BEVERAGE REPERTOIRE

The breadth of Danish wine drinkers' repertoire has decreased in line with global trends for moderation and category switching

Alcoholic beverage repertoire: Top 20 tracking

% who have drunk the following beverages in the past 12 months
Base = All Danish regular wine drinkers (n=1,000)

Rank 2021	n=	2017 *1,000*	2018 *1,000*	2021 *1,000*	Tracking vs. '17	Tracking vs. '18
1	Red wine	88%	88%	88%	→	→
2	White wine	82%	85%	81%	→	↓
3	Beer	73%	79%	72%	→	↓
4	Rosé wine	58%	67%	67%	↑	→
5	Craft beer	45%	55%	47%	→	↓
6=	Champagne (French Champagne)	46%	42%	40%	↓	→
6=	Gin	37%	39%	40%	→	→
8=	Rum	47%	41%	33%	↓	↓
8=	Port	35%	32%	33%	→	→
10=	Whisky / Whiskey	40%	35%	30%	↓	↓
10=	Vodka	39%	38%	30%	↓	↓
12	Cocktails	34%	29%	24%	↓	↓
13	Sweet / dessert wine	31%	29%	23%	↓	↓
14	Other sparkling wine	27%	24%	21%	↓	→
15=	Liqueurs	24%	22%	20%	↓	→
15=	Brandy / Cognac	27%	20%	20%	↓	→
15=	Cava	24%	22%	20%	↓	→
15=	Cider	34%	32%	20%	↓	↓
19	Prosecco	15%	16%	19%	↑	→
20	Pre-mixed / RTD alcoholic beverages	17%	15%	13%	↓	→

WHAT DO MARKET EXPERTS SAY?

Market experts emphasise the success of wine within the Danish alcohol market

"Denmark is a very large market and compared to other beverages, I think it's doing very well. Wine has a lot of history and I think the market likes that."

Wine Journalist, Denmark

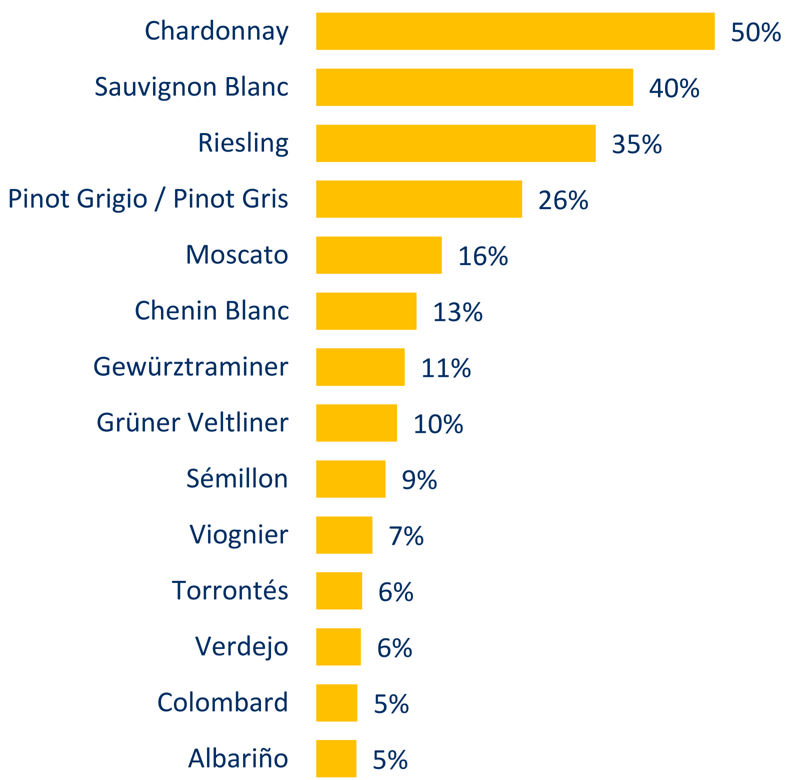
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2018, July 2021, (n1=000), Danish regular wine drinkers

VARIETAL CONSUMPTION

Popular international varietals Chardonnay and Cabernet Sauvignon are the most consumed varietals for white and red wine respectively

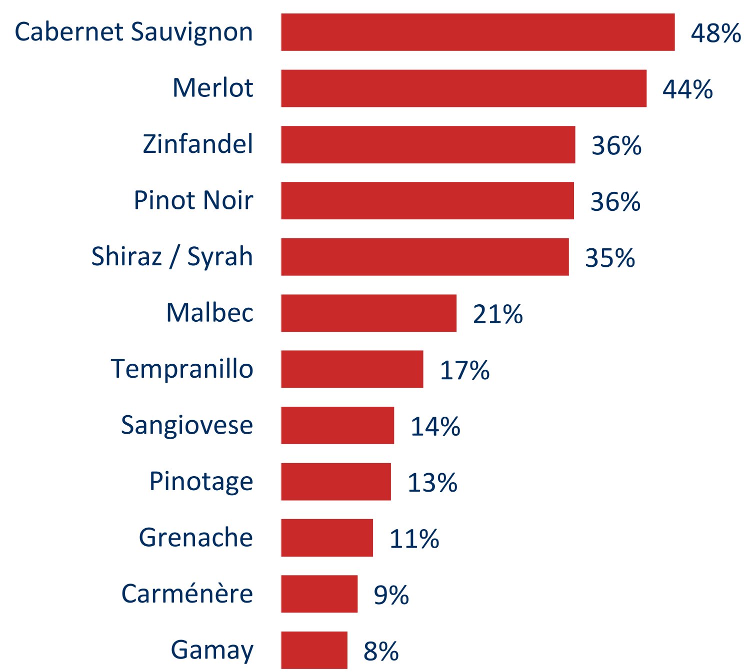
White varietal consumption

% who have drunk the following varietals or wine types in the past 6 months
Base = All Danish regular wine drinkers (n=1,000)



Red varietal consumption

% who have drunk the following varietals or wine types in the past 6 months
Base = All Danish regular wine drinkers (n=1,000)



Source: Wine Intelligence, Vinitrac®, July 2021, (n1=000), Danish regular wine drinkers

WHITE VARIETAL CONSUMPTION

In line with increased interest in the wine category, higher proportions of Danish consumers are drinking more niche white wine varietals compared with 2017

White varietal **consumption**: Tracking

% who have drunk the following varietals or wine types in the past 6 months
Base = All Danish regular wine drinkers (n=1,000)

Rank 2021	*n=*	2017 *1,000*	2018 *1,000*	2021 *1,000*	Tracking vs. '17	Tracking vs. '18
1	Chardonnay	55%	55%	50%	↓	↓
2	Sauvignon Blanc	41%	42%	40%	→	→
3	Riesling	38%	36%	35%	→	→
4	Pinot Grigio / Pinot Gris	28%	26%	26%	→	→
5	Moscato	18%	17%	16%	→	→
6	Chenin Blanc	9%	8%	13%	↑	↑
7	Gewürztraminer	12%	12%	11%	→	→
8	Grüner Veltliner	6%	6%	10%	↑	↑
9	Sémillon	6%	6%	9%	↑	↑
10	Viognier	4%	4%	7%	↑	↑
11=	Torrontés	5%	4%	6%	→	→
11=	Verdejo	4%	4%	6%	↑	→
13=	Colombard	3%	3%	5%	↑	↑
13=	Albariño	2%	3%	5%	↑	↑

↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2018, July 2021, (n1=000), Danish regular wine drinkers

RED VARIETAL CONSUMPTION

Fewer Danish consumers have drunk more popular red varietals compared with 2017, but are not drinking niche ones to the same extent they are for white wine

Red varietal **consumption**: Tracking

% who have drunk the following varietals or wine types in the past 6 months
Base = All Danish regular wine drinkers (n=1,000)

Rank 2021		2017	2018	2021	Tracking	
	n=	*1,000*	*1,000*	*1,000*	vs. '17	vs. '18
1	Cabernet Sauvignon	55%	55%	48%	↓	↓
2	Merlot	54%	51%	44%	↓	↓
3=	Zinfandel	27%	33%	36%	↑	→
3=	Pinot Noir	38%	37%	36%	→	→
5	Shiraz / Syrah	40%	38%	35%	↓	→
6	Malbec	19%	21%	21%	→	→
7	Tempranillo	17%	17%	17%	→	→
8	Sangiovese	13%	13%	14%	→	→
9	Pinotage	9%	12%	13%	↑	→
10	Grenache	10%	9%	11%	→	→
11	Carménère	9%	10%	9%	→	→
12	Gamay	3%	3%	8%	↑	↑

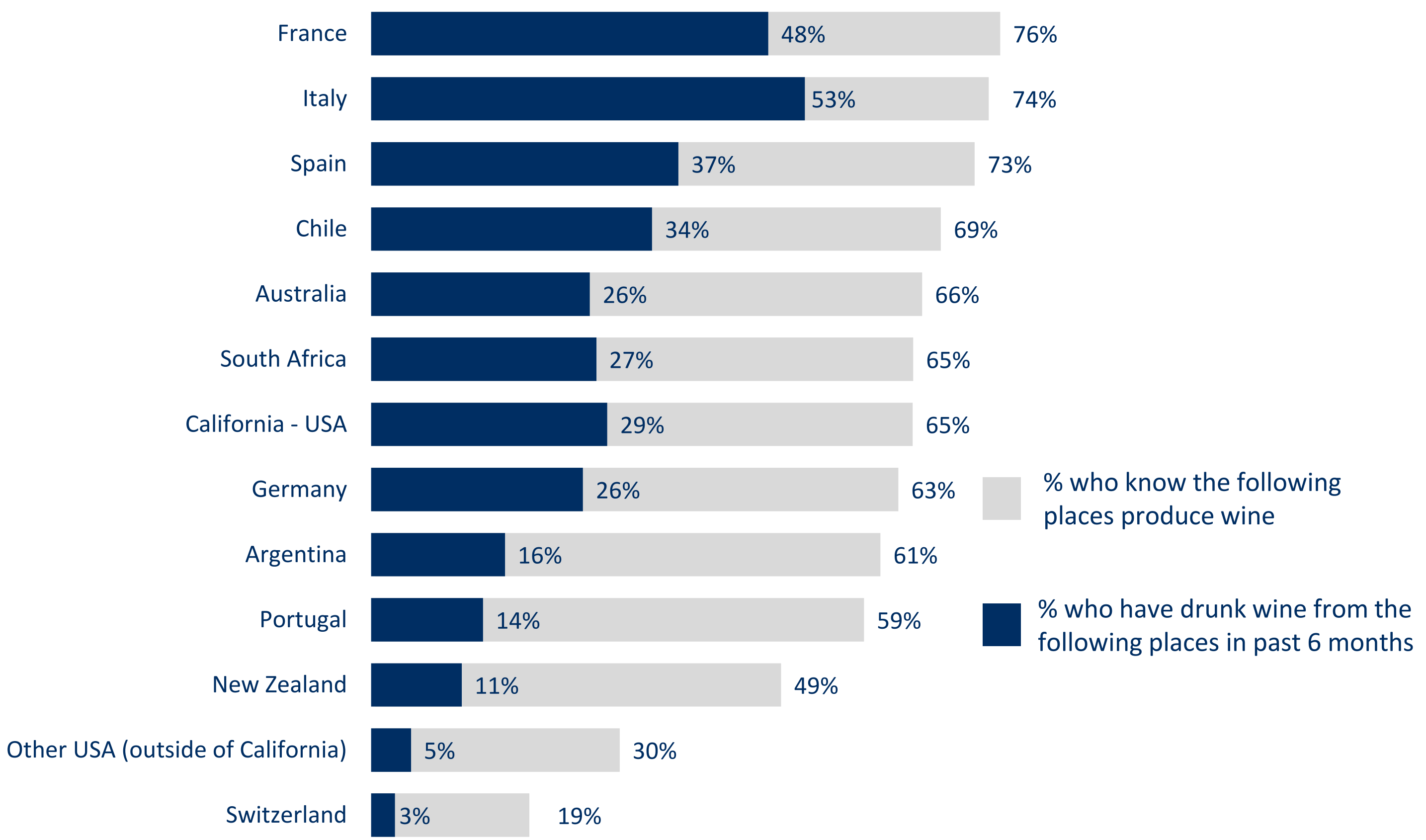
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2018, July 2021, (n1=000), Danish regular wine drinkers

COUNTRY OF ORIGIN AWARENESS AND CONSUMPTION

Broad country of origin awareness and consumption in the Danish market, with higher incidence levels in both measures for Old World origins

Country of origin **awareness** and respective **consumption** level

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



Source: Wine Intelligence, Vinitrac®, July 2021, (n1=000), Danish regular wine drinkers

COUNTRY OF ORIGIN AWARENESS

Though incidence remains high for most origins, there has been a marked decline of country of origin awareness compared with 2017

Country of origin **awareness**: Tracking

% who know the following places produce wine
Base = All Danish regular wine drinkers (n=1,000)

Rank 2021	*n=*	2017 *1,000*	2018 *1,000*	2021 *1,000*	Tracking vs. '17	Tracking vs. '18
1	France	86%	82%	76%	↓	↓
2	Italy	85%	82%	74%	↓	↓
3	Spain	84%	78%	73%	↓	↓
4	Chile	82%	79%	69%	↓	↓
5	Australia	74%	75%	66%	↓	↓
6=	South Africa	77%	75%	65%	↓	↓
6=	California - USA	72%	72%	65%	↓	↓
8	Germany	62%	63%	63%	→	→
9	Argentina	66%	67%	61%	↓	↓
10	Portugal	61%	62%	59%	→	→
11	New Zealand	41%	49%	49%	↑	→
12	Other USA (outside of California)	19%	34%	30%	↑	↓
13	Switzerland	13%	19%	19%	↑	→

↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2018, July 2021, (n1=000), Danish regular wine drinkers

COUNTRY OF ORIGIN CONSUMPTION

Consumption of German wine has increased significantly since 2017 amongst overall declines in consumption following lower awareness

Country of origin **consumption**: Tracking

% who have drunk wine from the following places in the past 6 months
Base = All Danish regular wine drinkers (n=1,000)

Rank 2021	*n=*	2017 *1,000*	2018 *1,000*	2021 *1,000*	Tracking vs. '17	Tracking vs. '18
1	Italy	56%	56%	53%	→	→
2	France	50%	47%	48%	→	→
3	Spain	42%	37%	37%	↓	→
4	Chile	47%	46%	34%	↓	↓
5	California - USA	26%	32%	29%	→	→
6	South Africa	39%	37%	27%	↓	↓
7=	Australia	32%	34%	26%	↓	↓
7=	Germany	21%	20%	26%	↑	↑
9	Argentina	21%	17%	16%	↓	→
10	Portugal	12%	14%	14%	→	→
11	New Zealand	8%	9%	11%	↑	→
12	Other USA (outside of California)	3%	5%	5%	→	→
13	Switzerland	2%	2%	3%	→	→

WHAT DO MARKET EXPERTS SAY?

Market experts emphasise the growth of German wine within the Danish market

"German wine is also growing, we see a positive trend. And actually when you go into some of the more premium supermarkets, Irma, Meny, you see a lot of Riesling."

Marketing Manager, Denmark

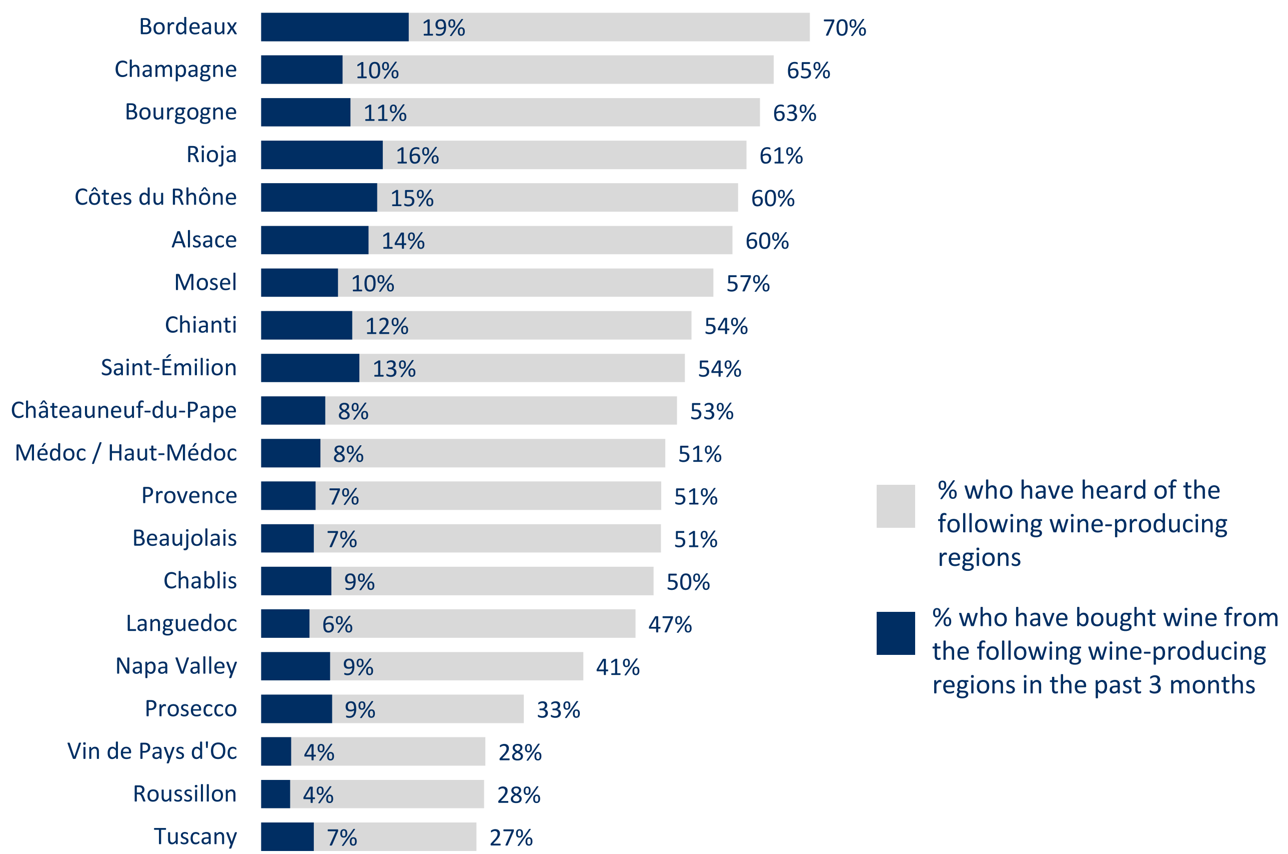
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2018, July 2021, (n1=000), Danish regular wine drinkers

REGION OF ORIGIN AWARENESS AND PURCHASE

French regions have the highest awareness levels amongst Danish consumers

Region of origin **awareness** and respective **purchase** level: Top 20

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



Source: Wine Intelligence, Vinitrac®, July 2021, (n1=000), Danish regular wine drinkers

REGION OF ORIGIN AWARENESS

In line with country of origin, region of origin awareness incidences have broadly declined in Denmark since 2017

Region of origin **awareness**: Tracking

% who have heard of the following wine-growing regions
Base = All Danish regular wine drinkers (n=1,000)

Rank 2021	n=	2017 *1,000*	2018 *1,000*	2021 *1,000*	Tracking vs. '17	Tracking vs. '18
1	Bordeaux	76%	81%	70%	⬇	⬇
2	Champagne	72%	74%	65%	⬇	⬇
3	Bourgogne	71%	72%	63%	⬇	⬇
4	Rioja	63%	67%	61%	➡	⬇
5=	Côtes du Rhône	67%	70%	60%	⬇	⬇
5=	Alsace	61%	66%	60%	➡	⬇
7	Mosel	58%	62%	57%	➡	⬇
8=	Chianti	58%	61%	54%	➡	⬇
8=	Saint-Émilion	50%	55%	54%	➡	➡
10	Châteauneuf-du-Pape	51%	54%	53%	➡	➡
11=	Médoc / Haut-Médoc	52%	55%	51%	➡	➡
11=	Provence	55%	59%	51%	➡	⬇
11=	Beaujolais	50%	54%	51%	➡	➡
14	Chablis	51%	52%	50%	➡	➡
15	Languedoc	49%	51%	47%	➡	➡
16	Napa Valley	43%	47%	41%	➡	⬇
17	Prosecco	24%	30%	33%	⬆	➡
18=	Vin de Pays d'Oc	27%	30%	28%	➡	➡
18=	Roussillon	26%	27%	28%	➡	➡
20	Tuscany	28%	33%	27%	➡	⬇

⬆ / ⬇ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, July 2017, July 2018, July 2021, (n1=000), Danish regular wine drinkers

REGION OF ORIGIN PURCHASE

The declines in awareness have not yet translated into significant purchase declines for most regions of origin

Region of origin **purchase**: Tracking

% who have bought wine from the following wine-producing regions in the past 3 months
Base = All Danish regular wine drinkers (n=1,000)

Rank 2021	*n=*	2017 *1,000*	2018 *1,000*	2021 *1,000*	Tracking vs. '17	Tracking vs. '18
1	Bordeaux	22%	20%	19%	➡	➡
2	Rioja	20%	16%	16%	⬇	➡
3	Côtes du Rhône	19%	18%	15%	⬇	➡
4	Alsace	16%	14%	14%	➡	➡
5	Saint-Émilion	11%	12%	13%	➡	➡
6	Chianti	16%	14%	12%	⬇	➡
7	Bourgogne	14%	12%	11%	➡	➡
8=	Champagne	12%	10%	10%	➡	➡
8=	Mosel	10%	9%	10%	➡	➡
10=	Prosecco	5%	7%	9%	⬆	➡
10=	Chablis	11%	11%	9%	➡	➡
10=	Napa Valley	8%	9%	9%	➡	➡
13=	Châteauneuf-du-Pape	7%	8%	8%	➡	➡
13=	Médoc / Haut-Médoc	10%	9%	8%	⬇	➡
15=	Provence	8%	7%	7%	➡	➡
15=	Tuscany	6%	6%	7%	➡	➡
15=	Beaujolais	6%	6%	7%	➡	➡
18	Languedoc	6%	5%	6%	➡	➡
19=	Piedmont	5%	5%	5%	➡	➡
19=	Sicily	4%	4%	5%	➡	➡

⬆ / ⬇ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2018, July 2021, (n1=000), Danish regular wine drinkers

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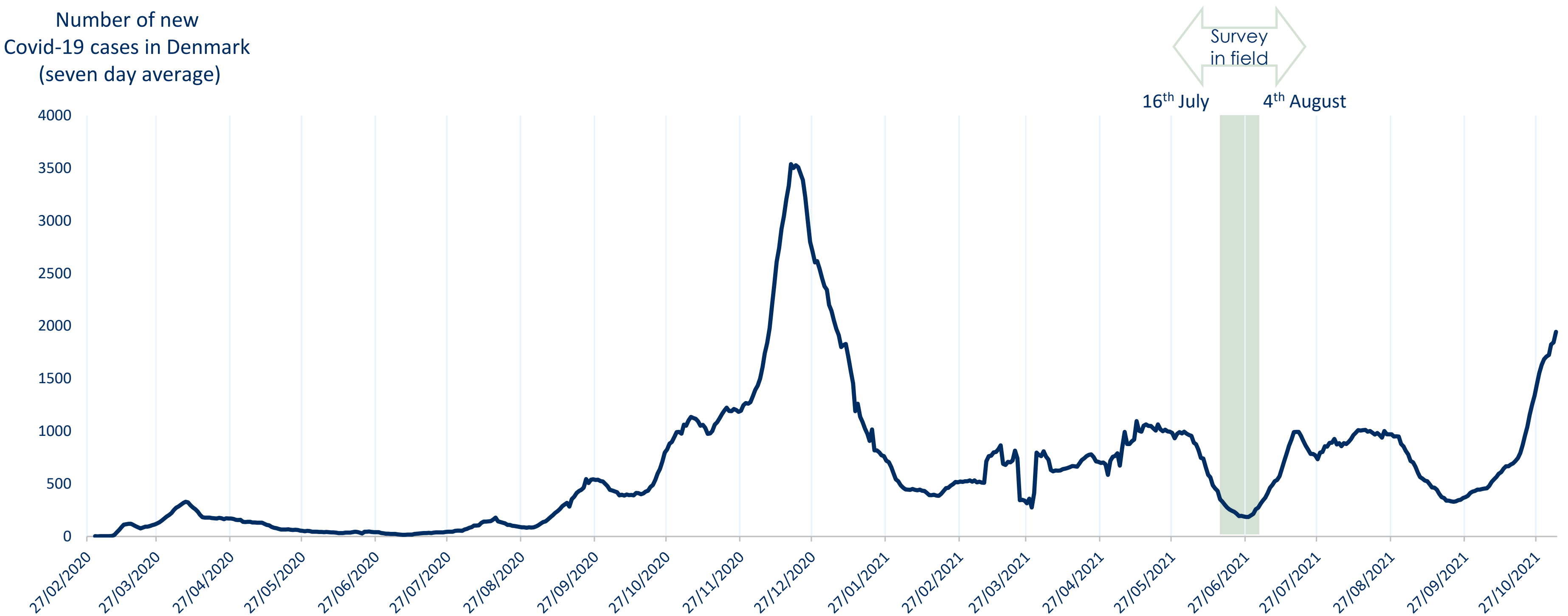
TIMELINE CONTEXT DURING SURVEY DATA COLLECTION 2021



Denmark confirmed its first case of Covid-19 on 27th February 2020 with the government announcing the country's first restrictions in March, featuring the closure of restaurants and bars and limiting gatherings to 10 people. Restrictions were eased in June, with restaurants and bars reopening and allowing gatherings of up to 50 people which increased to 100 in July. In September, Denmark's restaurants and bars closed to visitors at 10pm, and gatherings were reduced back down to 50 people. By December, the country's restrictions were back to their most severe levels seen in March 2020 but the vaccination program had begun.

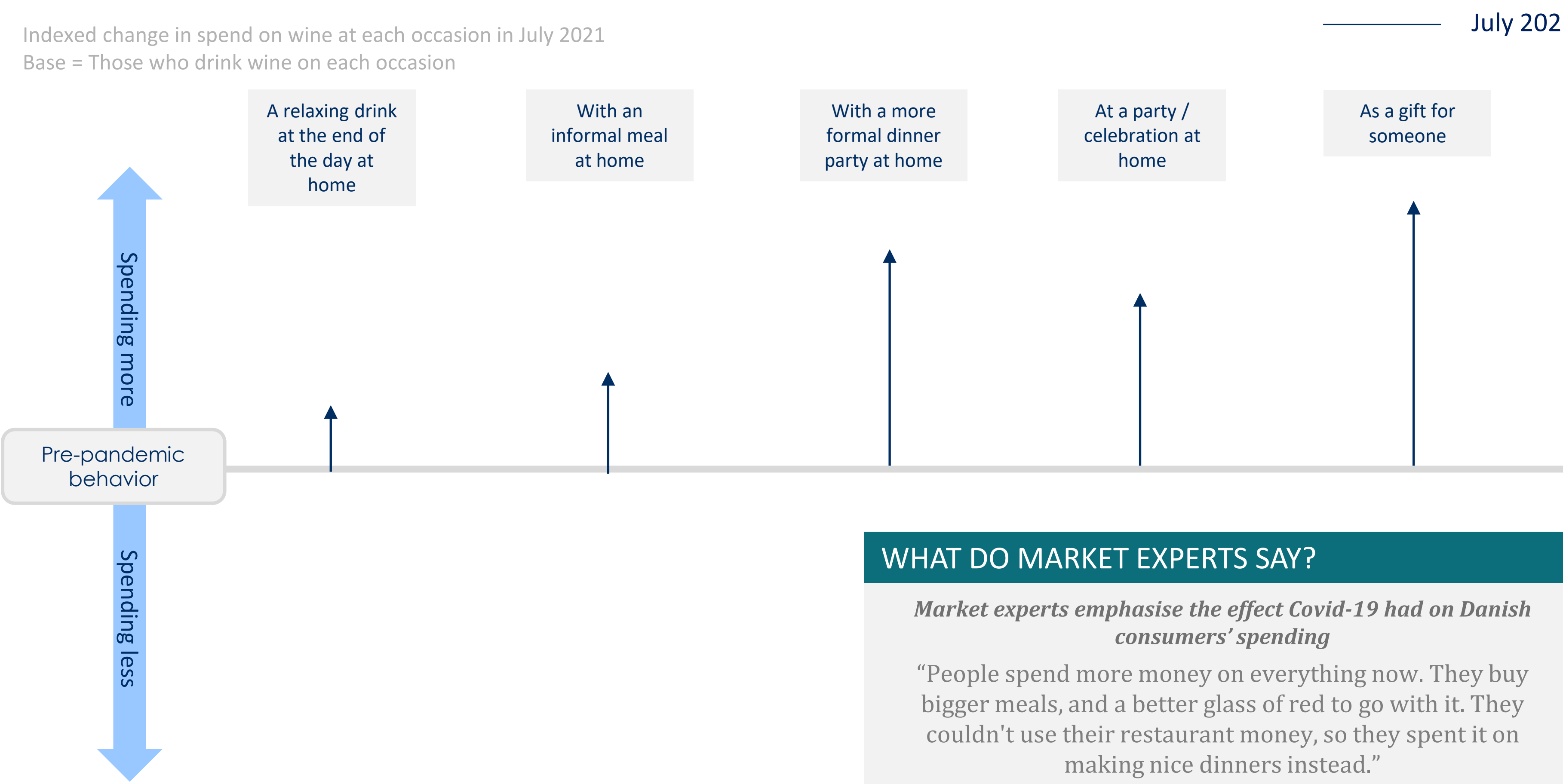
In January 2021, restriction tightened further with only gatherings of 5 people being allowed with a ban on the sale of alcohol after 10pm in the off-trade. Danes returned to bars and restaurants when restrictions loosened in April, on the condition they could prove their vaccination status or if they had a negative Covid-19 test in the past 72 hours. By July restaurant and bars could remain open until 2am and restrictions to the sale of alcohol in the off-trade are lifted. In September Denmark became the first EU country to life all Covid-19 restrictions due to a highly successful vaccination program.

Source: https://ourworldindata.org/coronavirus/country/denmark

OFF-TRADE CHANGE IN SPEND: BY OCCASION

Danish wine consumers are spending more across all off-trade occasions compared to the pre-pandemic levels

Off-trade index change in **spend**: July 2021 vs pre-pandemic behavior



WHAT DO MARKET EXPERTS SAY?

Market experts emphasise the effect Covid-19 had on Danish consumers' spending

"People spend more money on everything now. They buy bigger meals, and a better glass of red to go with it. They couldn't use their restaurant money, so they spent it on making nice dinners instead."

Wine Importer, Denmark

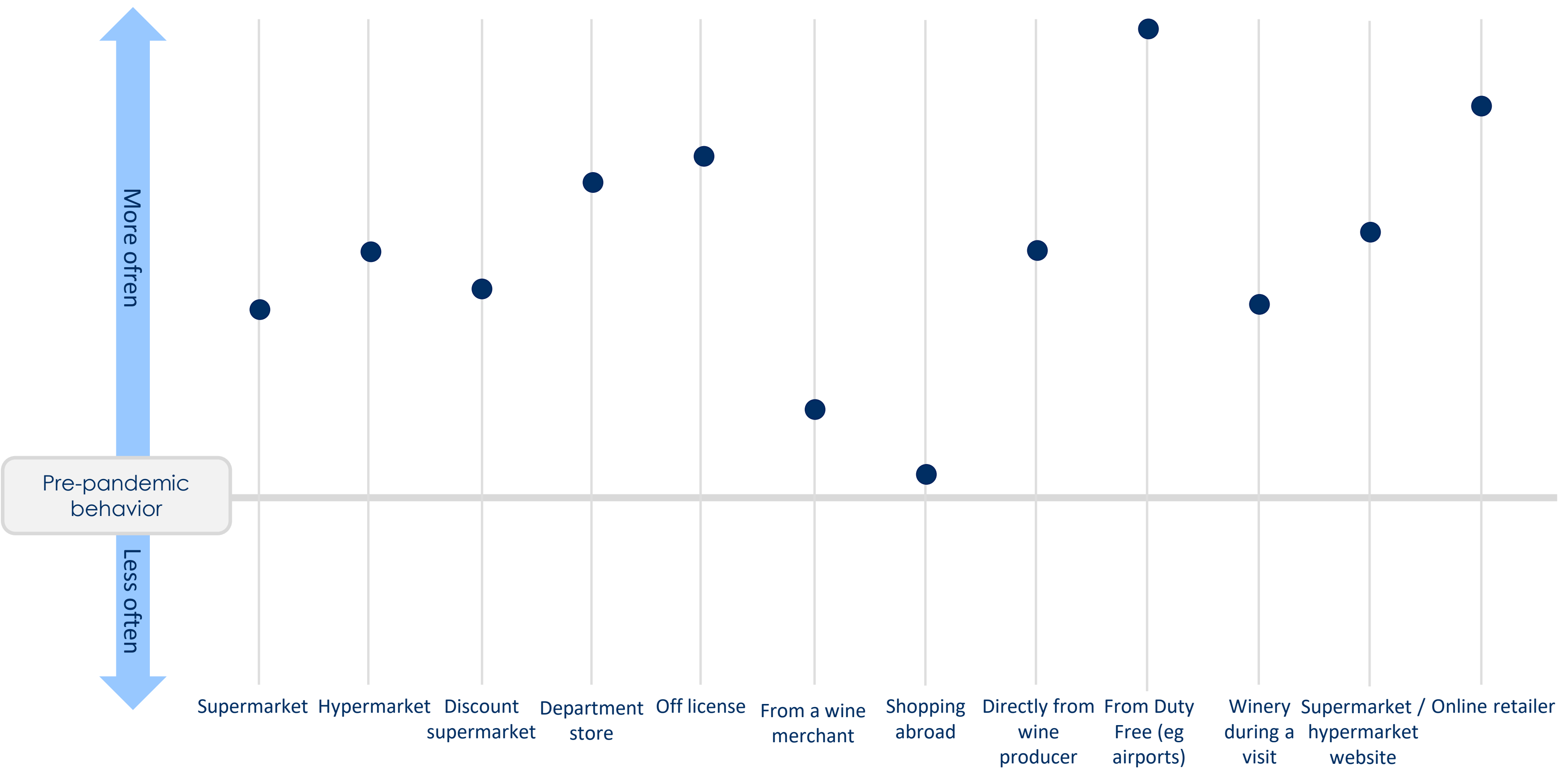
Source:Wine Intelligence, Vinitrac®, July 2021, (n1=000), Danish regular wine drinkers

CHANGE IN CHANNEL USAGE

Consumers say they are utilising all purchasing channels in the Danish market than they were before the pandemic – note that “Duty Free” in Denmark often means cross-border

Change in channel usage: July 2021 vs pre-pandemic behavior

Indexed change in channel usage in July 2021
Base = Those who have bought wine from each channel in the past 6 months



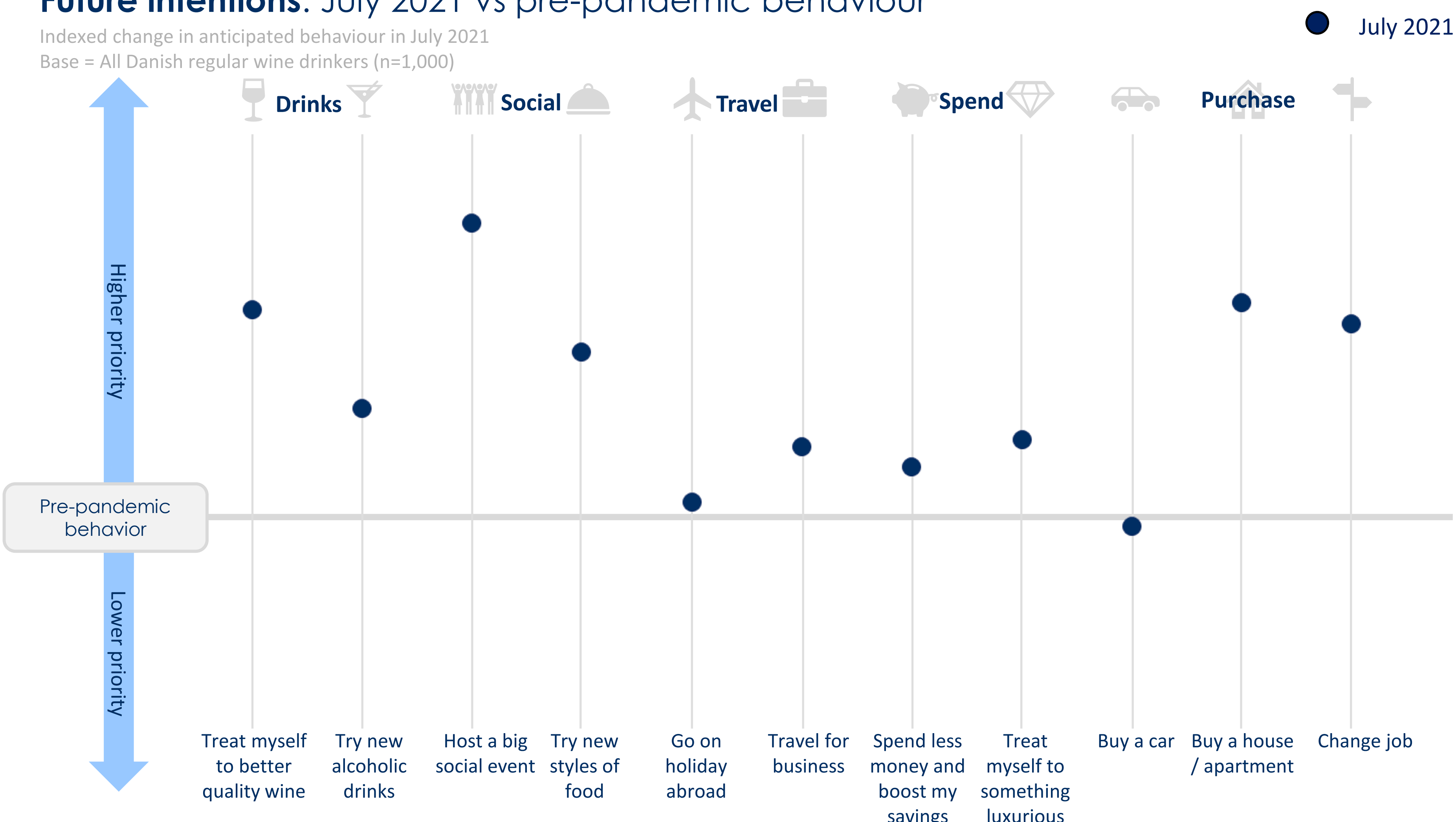
Source:Wine Intelligence, Vinitrac®, July 2021, (n1=000), Danish regular wine drinkers

FUTURE BEHAVIOR PRIORITIES

Danish consumers have given higher priority to hosting social events and treating themselves, though remain more hesitant in terms of travelling abroad

Future intentions: July 2021 vs pre-pandemic behaviour

Indexed change in anticipated behaviour in July 2021
Base = All Danish regular wine drinkers (n=1,000)



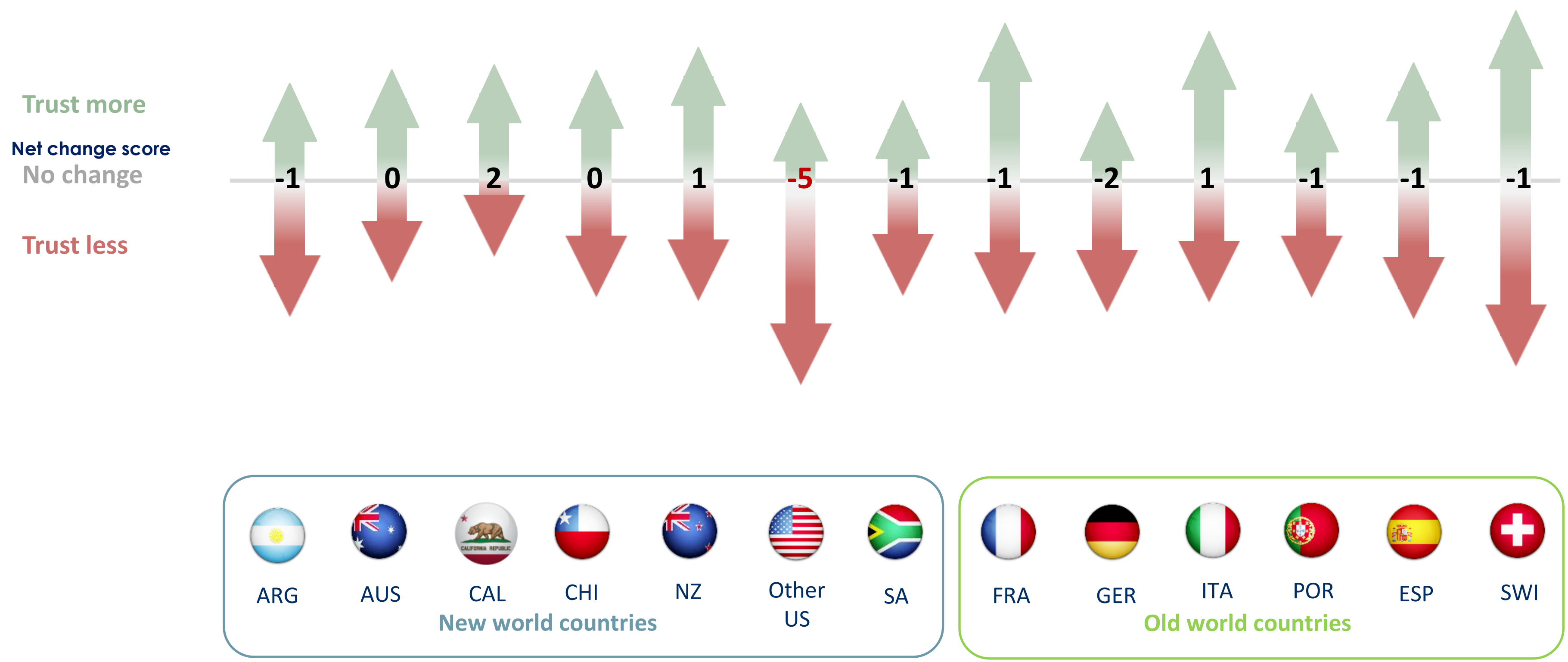
Source:Wine Intelligence, Vinitrac®, July 2021, (n1=000), Danish regular wine drinkers

COUNTRY OF ORIGIN: CHANGE IN TRUST

Trust levels of wine from different origins have remained stable since the pandemic, apart from wine from the US outside of California

Change in trust of wine origins during July 2021 compared with pre-pandemic behaviour

% who have changed their perception of each place due to the impacts of Coronavirus
Base = Those who have heard of each wine-producing place



Net change score = % consumers who trust wine from this country more than they used to minus % consumers who trust wine from this country less than they used to

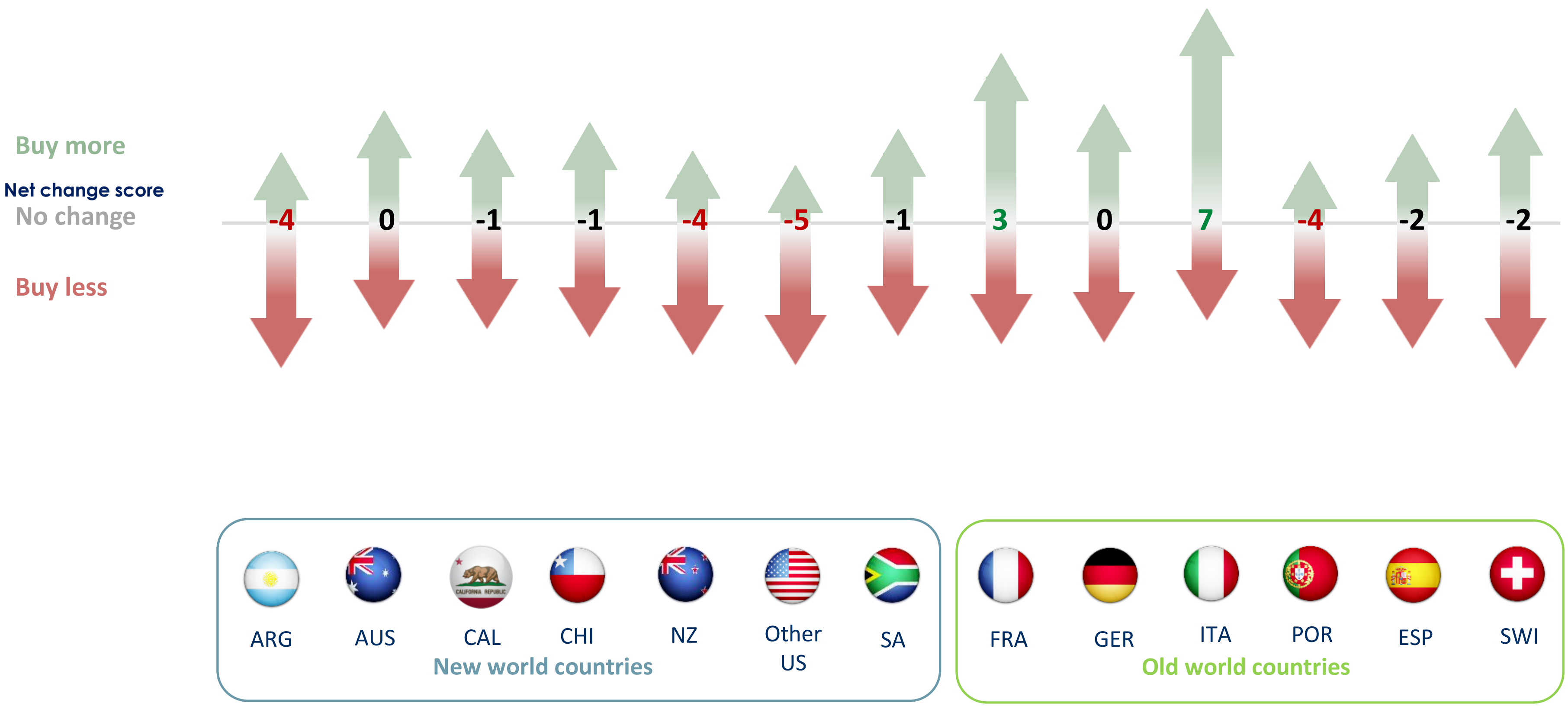
Green / red: Net change score of above 3 / below 3
Source:Wine Intelligence, Vinitrac®, July 2021, (n1=000), Danish regular wine drinkers

COUNTRY OF ORIGIN: CHANGE IN PURCHASE

Danish consumers say they are purchasing more French and Italian wines than they were compared to the pandemic, though their trust in these origins has remained stable

Country of origin change in purchase during July 2021 compared with pre-pandemic behaviour

% who have changed their purchase behavior for each place due to the impacts of Coronavirus
Base = Those who have heard of each wine-producing place



Net change score = % consumers who buy more wine from this country minus % consumers who buy less wine from this country

Green / red: Net change score of above 3 / below 3
Source:Wine Intelligence, Vinitrac®, July 2021, (n1=000), Danish regular wine drinkers

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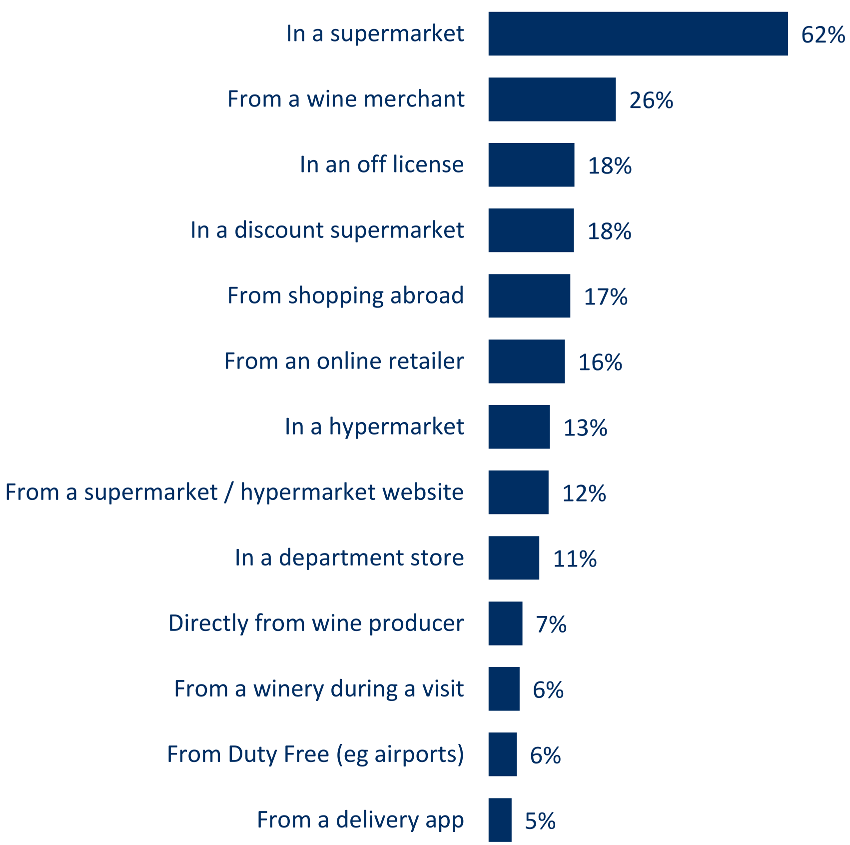
WINE-BUYING CHANNEL USAGE

Supermarket are the most popular wine-buying channel with a minority of consumers currently using online methods

Wine-buying channel usage

% who have bought wine from the following channels in the past 6 months
Base = All Danish regular wine drinkers (n=1,000)



WHAT DO MARKET EXPERTS SAY?

Market experts emphasize changing consumer behaviour of purchasing wine online due to the Covid-19 pandemic

"Like other places, restaurants were completely shut, so consumers have to shop from wine shops which I think is still affecting the market. Consumers are buying a lot of wine from online wine shops. But, of course, people are starting to enter restaurants again, though online wine shops are still doing well because now consumers know it's easy to buy wine online."

Wine Journalist , Denmark

Source: Wine Intelligence, Vinitrac®, July 2021, (n1=000), Danish regular wine drinkers

WINE-BUYING CHANNEL USAGE

In line with other markets, use of supermarkets for wine-buying has significantly declined due to impacts of Covid-19, though the trade suggests this will bounce back

Wine-buying channel usage: Tracking

% who have bought wine from the following channels in the past 6 months
Base = All Danish regular wine drinkers (n=1,000)

Rank 2021	n=	2017 *1,000*	2018 *1,000*	2021 *1,000*	Tracking vs. '17	Tracking vs. '18
1	In a supermarket	72%	72%	62%	↓	↓
2	From a wine merchant	30%	26%	26%	→	→
3=	In an off license	21%	20%	18%	→	→
3=	In a discount supermarket	21%	22%	18%	→	↓
5	From shopping abroad	27%	26%	17%	↓	↓
6	From an online retailer	n/a	n/a	16%		
7	In a hypermarket	9%	12%	13%	↑	→
8	From a supermarket / hypermarket website	n/a	n/a	12%		
9	In a department store	11%	10%	11%	→	→
10	Directly from wine producer	6%	4%	7%	→	↑
11=	From a winery during a visit	n/a	n/a	6%		
11=	From Duty Free (eg airports)	8%	6%	6%	→	→
13	From a delivery app	n/a	n/a	5%		

WHAT DO MARKET EXPERTS SAY?

"Sales and consumption during COVID have basically been just shifted online and people have picked up from the supermarkets that were allowed to remain open. But it appears that people are slowly beginning now to come back to the bigger shopping centres and resuming their patterns from pre-COVID times."

Wine Educator, Denmark

↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2018, July 2021, (n1=000), Danish regular wine drinkers

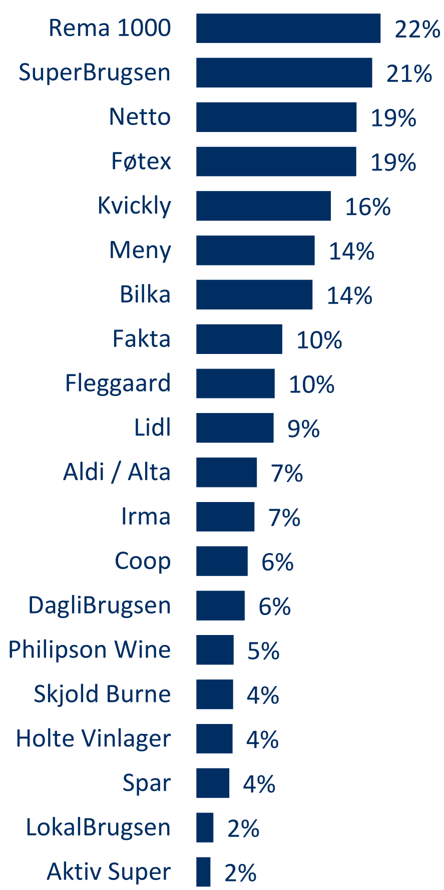
WINE-BUYING RETAILER USAGE

wine intelligence

Usage levels are fairly evenly distributed among the top retailers

Wine-buying retailer usage: Top 20

% who mainly use the following retailers to buy wine
Base = Those who buy wine in the off-trade



WHAT DO MARKET EXPERTS SAY?

Market experts emphasise the important role that supermarkets play within the Danish wine market

"You can say supermarkets are the gatekeepers to the consumers. You used to have two big chains, but they are very strong also. You can say you have four big players - and they decide what the consumers shall drink."

Marketing Manager, Denmark

Source: Wine Intelligence, Vinitrac®, July 2021, (n1=000), Danish regular wine drinkers

WINE-BUYING RETAILER USAGE

Discount and convenience stores such as Rema 1000 and Aldi have experienced increases in usage for wine-buying whilst grocery stores such as Fleggaard have seen declines

Retailer usage: Top 20: Tracking

% who mainly use the following retailers to buy wine
Base = Those who buy wine in the off-trade

Rank 2021		2017	2018	2021	Tracking	
	n=	*1,000*	*1,000*	*1,000*	vs. '17	vs. '18
1	Rema 1000	16%	20%	22%	↑	→
2	SuperBrugsen	21%	21%	21%	→	→
3=	Netto	21%	21%	19%	→	→
3=	Føtex	24%	21%	19%	↓	→
5	Kvickly	20%	18%	16%	↓	→
6=	Meny	14%	15%	14%	→	→
6=	Bilka	16%	14%	14%	→	→
8=	Fakta	16%	13%	10%	↓	→
8=	Fleggaard	15%	13%	10%	↓	↓
10	Lidl	8%	8%	9%	→	→
11=	Aldi / Alta	5%	6%	7%	↑	→
11=	Irma	9%	6%	7%	→	→
13=	Coop	n/a	n/a	6%		
13=	DagliBrugsen	6%	4%	6%	→	→
15	Philipson Wine	4%	4%	5%	→	→
16=	Skjold Burne	5%	5%	4%	→	→
16=	Holte Vinlager	3%	2%	4%	→	↑
16=	Spar	3%	2%	4%	→	↑
19=	LokalBrugsen	2%	2%	2%	→	→
19=	Aktiv Super	0%	1%	2%	↑	↑

↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2018, July 2021, (n1=000), Danish regular wine drinkers

WINE-BUYING CHOICE CUES

Wine that matches or complements food is the most important choice cue for the Danish wine consumer

Wine-buying choice cues

% who indicate each of the following factors is 'important' or 'very important' when buying wine
Base = All Danish regular wine drinkers (n=1,000)

Source: Wine Intelligence, Vinitrac®, July 2021, (n1=000), Danish regular wine drinkers

WINE-BUYING CHOICE CUES

In line with the increase in consumers who don't mind what they buy if it's a good price, more Danish consumers say promotional offers are important to them when buying wine compared with 2017

Wine-buying choice cues: Tracking

% who indicate each of the following factors is 'important' or 'very important' when buying wine
Base = All Danish regular wine drinkers (n=1,000)

Rank 2021	*n=*	2017 *1,000*	2018 *1,000*	2021 *1,000*	Tracking vs. '17	Tracking vs. '18
1	Wine that matches or complements food	79%	79%	78%	→	→
2=	Grape variety	60%	64%	61%	→	→
2=	The country of origin	60%	58%	61%	→	→
4=	Taste or wine style descriptions displayed on the shelves or on wine labels	63%	64%	60%	→	→
4=	Promotional offer	53%	54%	60%	↑	↑
6	A brand I am aware of	64%	63%	59%	↓	→
7=	The region of origin	48%	48%	52%	→	→
7=	Recommendation by friend or family	59%	55%	52%	↓	→
9	Recommendations from shop staff or shop leaflets	36%	40%	39%	→	→
10=	Recommendation by wine guide books	36%	34%	34%	→	→
10=	Alcohol content	29%	30%	34%	↑	→
12	Recommendation by wine critic or writer	34%	32%	33%	→	→
13=	Appeal of the bottle and / or label design	20%	23%	27%	↑	↑
13=	Whether or not the wine has won a medal or award	22%	22%	27%	↑	↑

↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2018, July 2021, (n1=000), Danish regular wine drinkers

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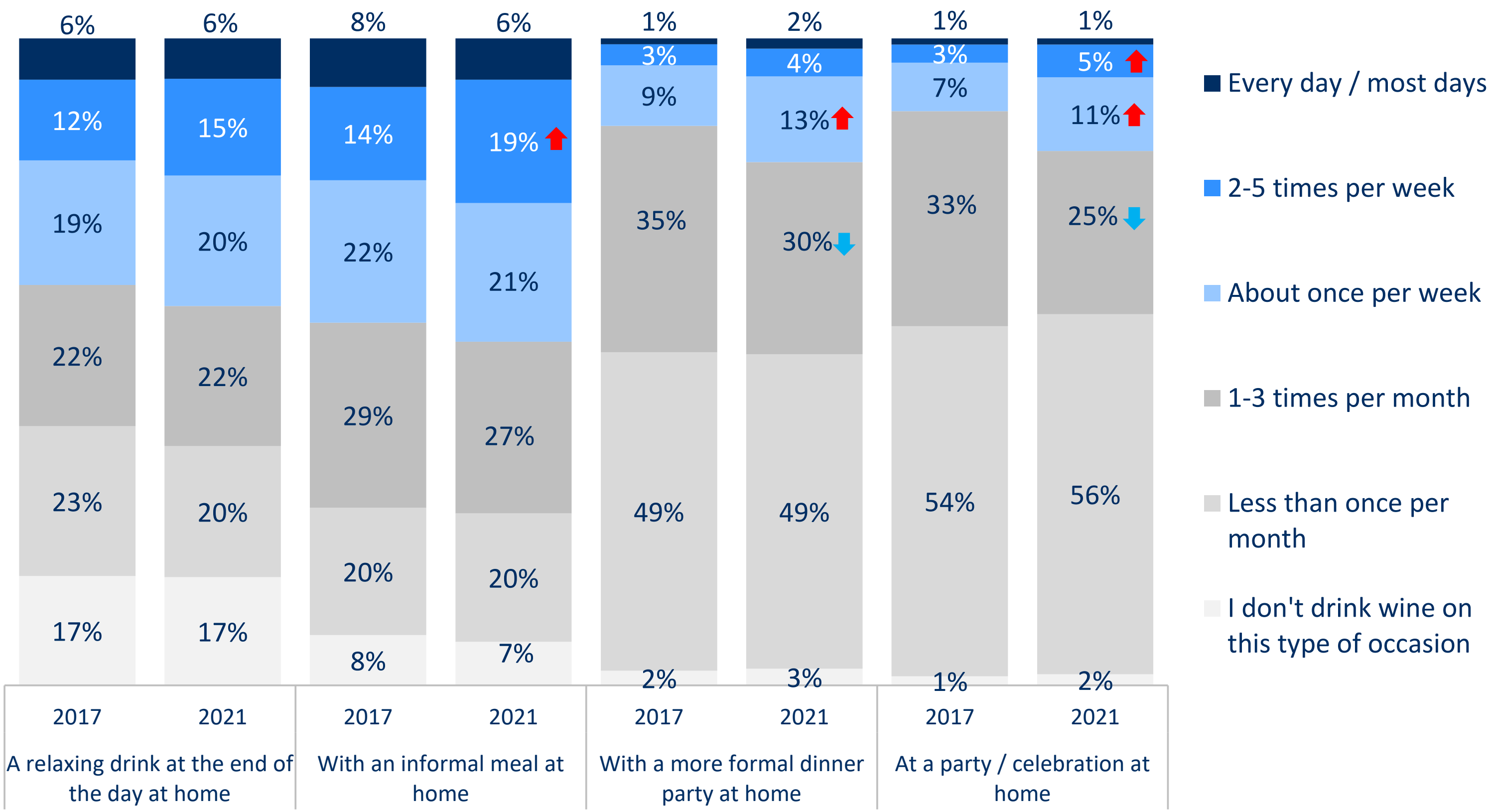
OFF-TRADE: WINE CONSUMPTION FREQUENCY BY OCCASION

Measured increase in weekly consumption across off-trade occasions since 2017

Off-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the off-trade



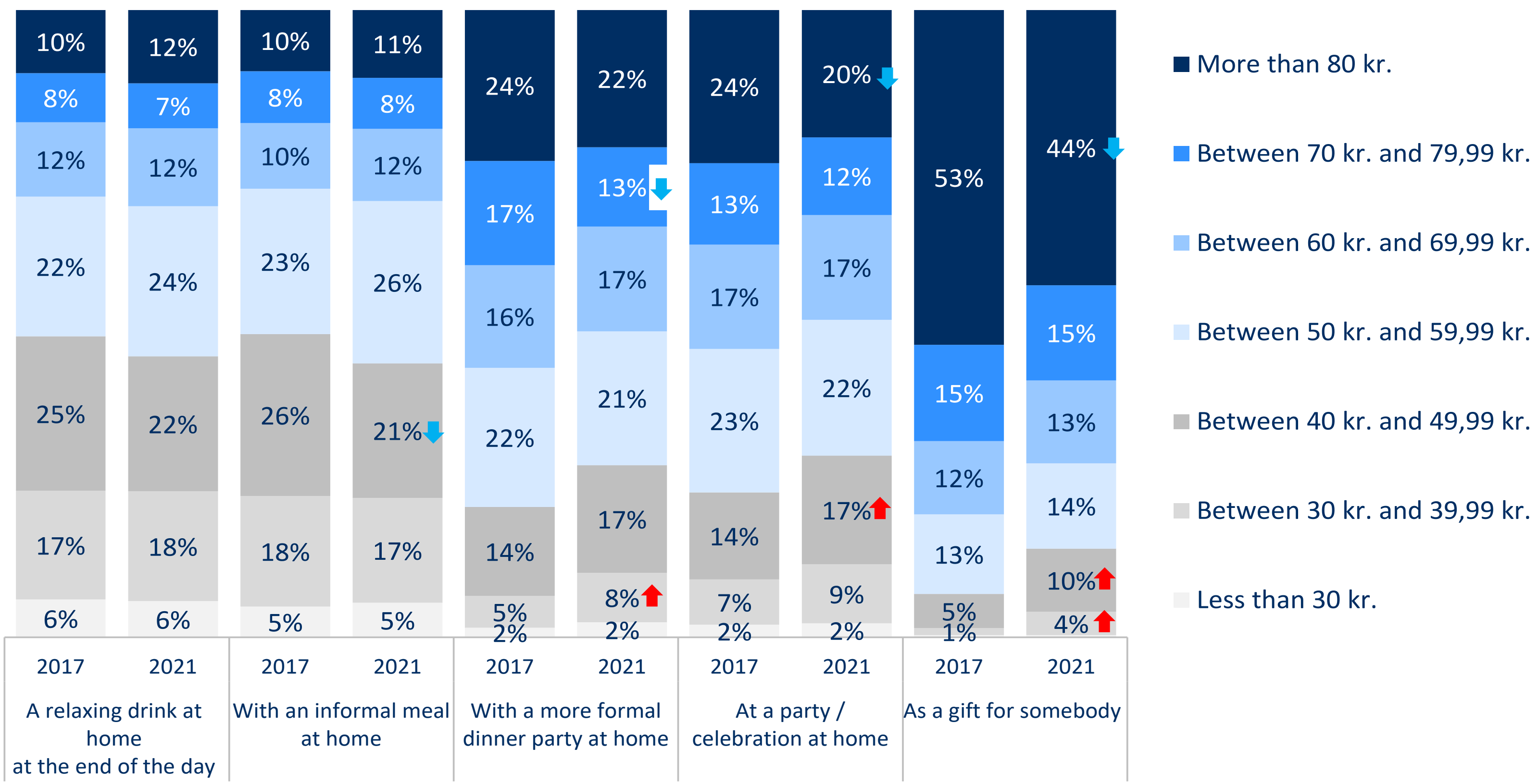
/ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2021, (n1=000), Danish regular wine drinkers

OFF-TRADE: SPEND ON WINE BY OCCASION

Though consumption frequency has increased for off-trade occasions, there has been a decrease in the off-trade spending for formal occasions

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®, July 2017, July 2021, (n1=000), Danish regular wine drinkers

WINE PURCHASE IN THE ON-TRADE

Recalled purchase incidence in the on-trade has largely regained its 2018 levels, despite the effects of Covid-19

Wine purchase in on-trade locations: Tracking

% who buy wine in a bar, pub or restaurant
Base = All Danish regular wine drinkers (n=1,000)

On-trade location	2017	2018	2021	Tracking	
n=	*1,000*	*1,000*	*1,000*	vs. '17	vs. '18
Bar	51%	46%	47%	➡	➡
Restaurant	89%	86%	85%	⬇	➡

Wine purchase in on-trade locations by age

% who buy wine in a bar, pub or restaurant
Base = All Danish regular wine drinkers (n=1,000)

On-trade location	All Danish regular wine drinkers	Age groups		
		18-34	35-54	55+
n=	*1,000*	*186*	*270*	*544*
Bar	47%	64%	59%	36%
Restaurant	85%	86%	79%	88%

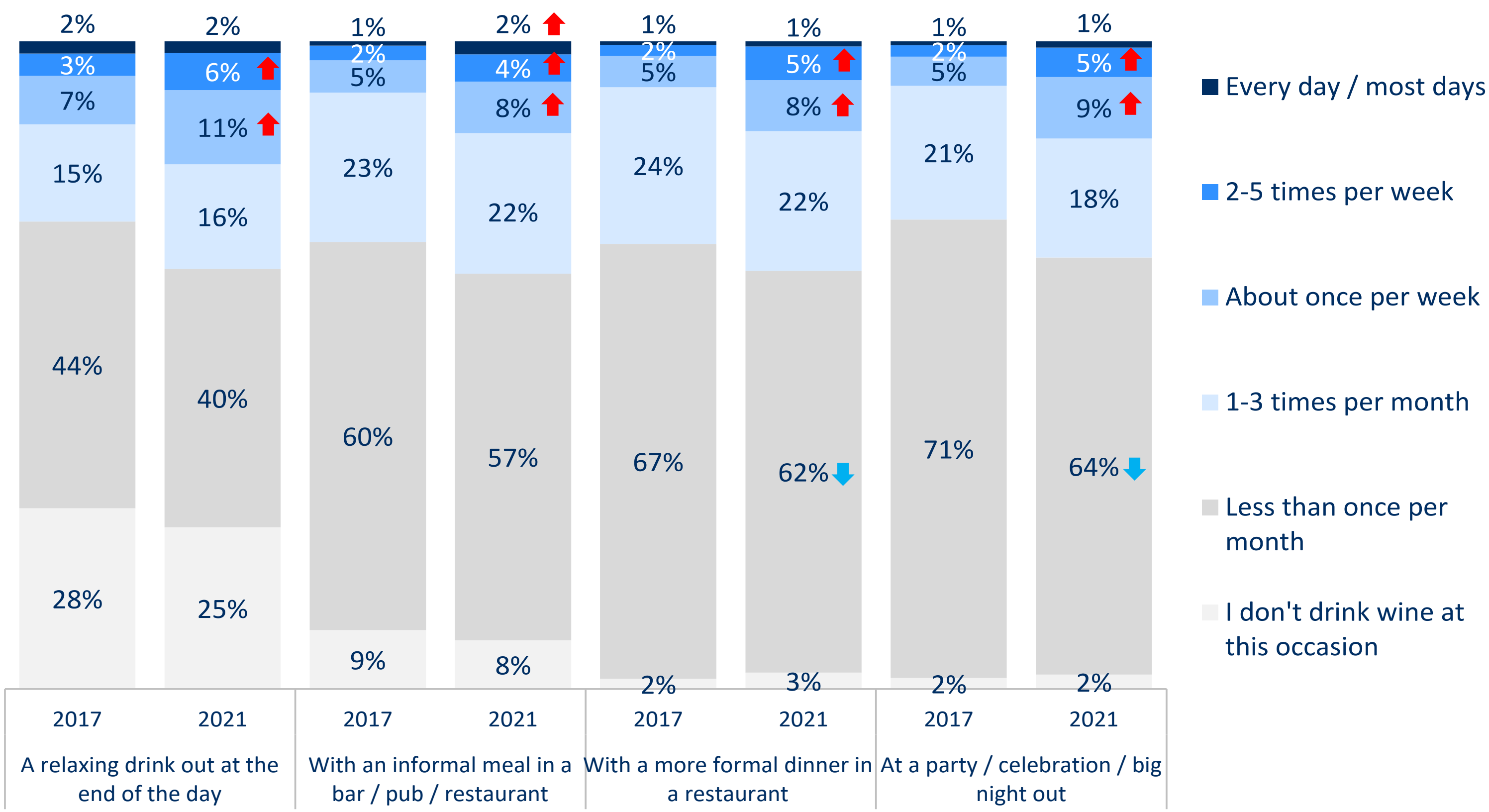
Red / Blue: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
⬆ / ⬇ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2018, July 2021, (n1=000), Danish regular wine drinkers

ON-TRADE: WINE CONSUMPTION FREQUENCY BY OCCASION

In line with the off-trade, consumption frequency has increased for all occasions in the on-trade

On-trade: Wine consumption frequency by occasion

Base = Those who buy wine in a bar, pub or restaurant



/ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level

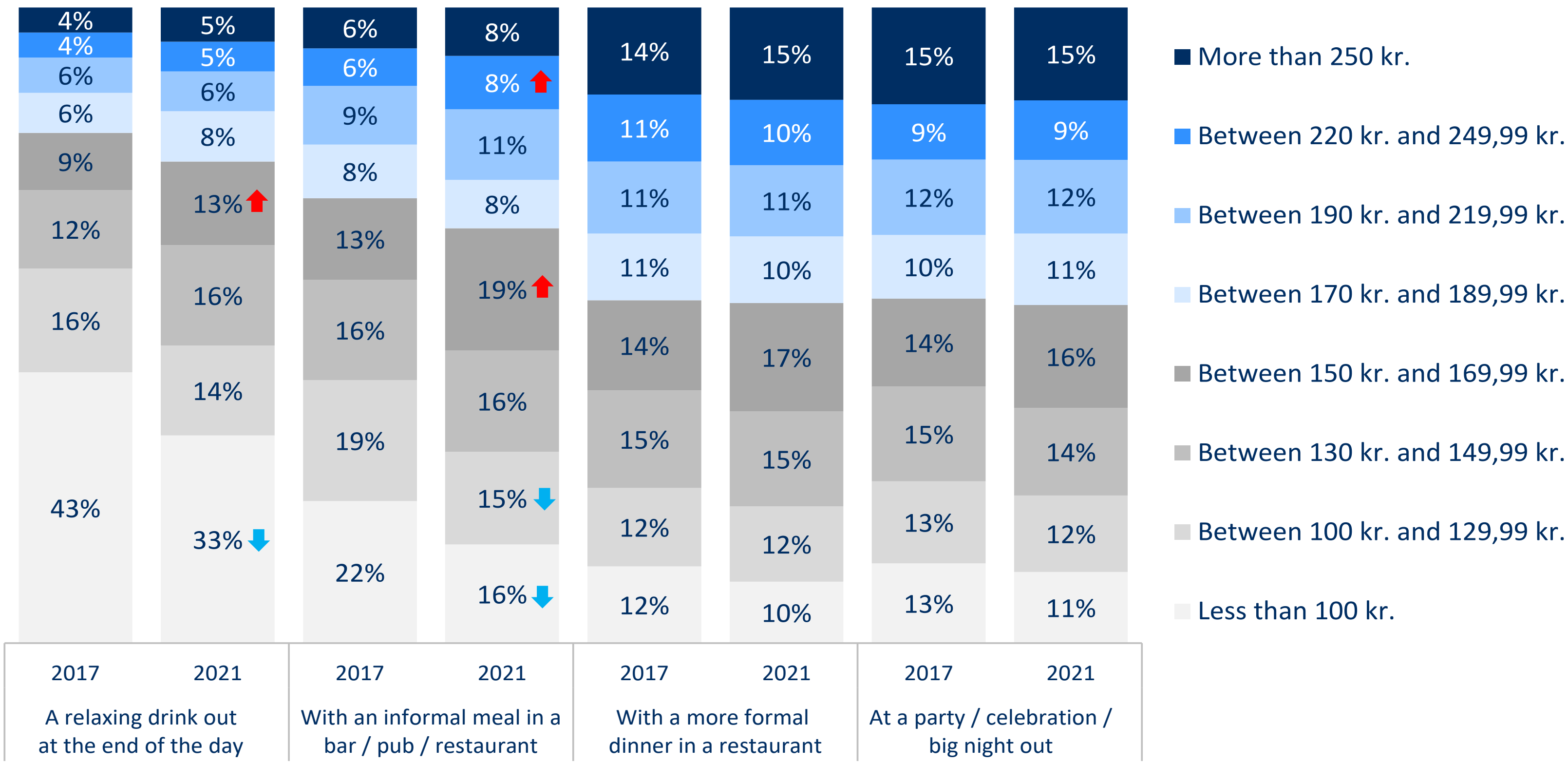
Source: Wine Intelligence, Vinitrac®, July 2017, July 2021, (n1=000), Danish regular wine drinkers

ON-TRADE: SPEND ON WINE BY OCCASION

In line with the increase in consumption frequency, spend per bottle of wine has increased for informal on-trade occasions

On-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®, July 2017, July 2021, (n1=000), Danish regular wine drinkers

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GLOBAL WINE BRAND POWER INDEX

Brand health measures included in the index

Measure	Definition	Sub-index	Index
Awareness	% who have heard of each brand (when prompted with a list of brand names with logos) Base = All wine drinkers	**Brand awareness index**	**Brand Power Index**
Purchase	% who have bought each brand in the past 3 months Base = All wine drinkers	**Brand purchase index**	
Conversion	% who have bought each brand in the past 3 months Base = Those who have heard of each brand		
Consideration	% who would consider buying each brand Base = Those who have heard of each brand		
Affinity	% who think each brand is right for people like them Base = Those who have heard of each brand	**Brand connection index**	
Recommendation	% who would recommend each brand to a friend Base = Those who have heard of each brand		

DENMARK WINE BRAND POWER INDEX 2021

The top 15 most powerful wine brands in the Danish wine market

Brand	Awareness Index	Purchase Index	Connection Index	Final Index
1st Casillero del Diablo	100	75	55	77.9
2nd Savanha	90	79	56	75.7
3rd Faustino	86	69	65	73.7
4th Barefoot	32	92	100	73.5
5th Hardys	85	73	60	73.0
6th Yellow Tail	45	85	80	69.5
7th J.P. Chenet	88	48	41	60.0
8th Torres	77	52	48	59.7
9th MontGras	62	58	57	59.1
10th Lindeman's	63	57	56	58.7
11th Mouton Cadet	58	50	68	58.4
12th Siglo	70	49	48	56.2
13th Santa Rita	67	53	44	55.1
14th Sunrise	67	50	46	54.8
15th Banrock Station	51	54	57	54.1

Source: Wine Intelligence, Vinitrac®, July 2021, (n1=000), Danish regular wine drinkers

The top 3 most powerful wine brands in the Danish wine market

1st Casillero del Diablo

2nd Savanha South Africa

3rd Bodegas Faustino

Casillero del Diablo tops the brand list in terms of power. Its position is largely due to its high awareness index, which makes up for a lower connection index (which is generally low for most brands).

South African brand Savanha ranks 2nd with indices just slightly lower than those for Casillero del Diablo. Faustino is just behind due to high purchase and connection indices.

The top 15 most powerful brands come from a range of countries of origin, suggesting there isn't a particular country that resonates more with Danish drinkers.

Though Barefoot has a perfect connection index and nearly perfect purchase incidence, its poor awareness index amongst Danish wine drinkers places the brand in 4th in terms of power.

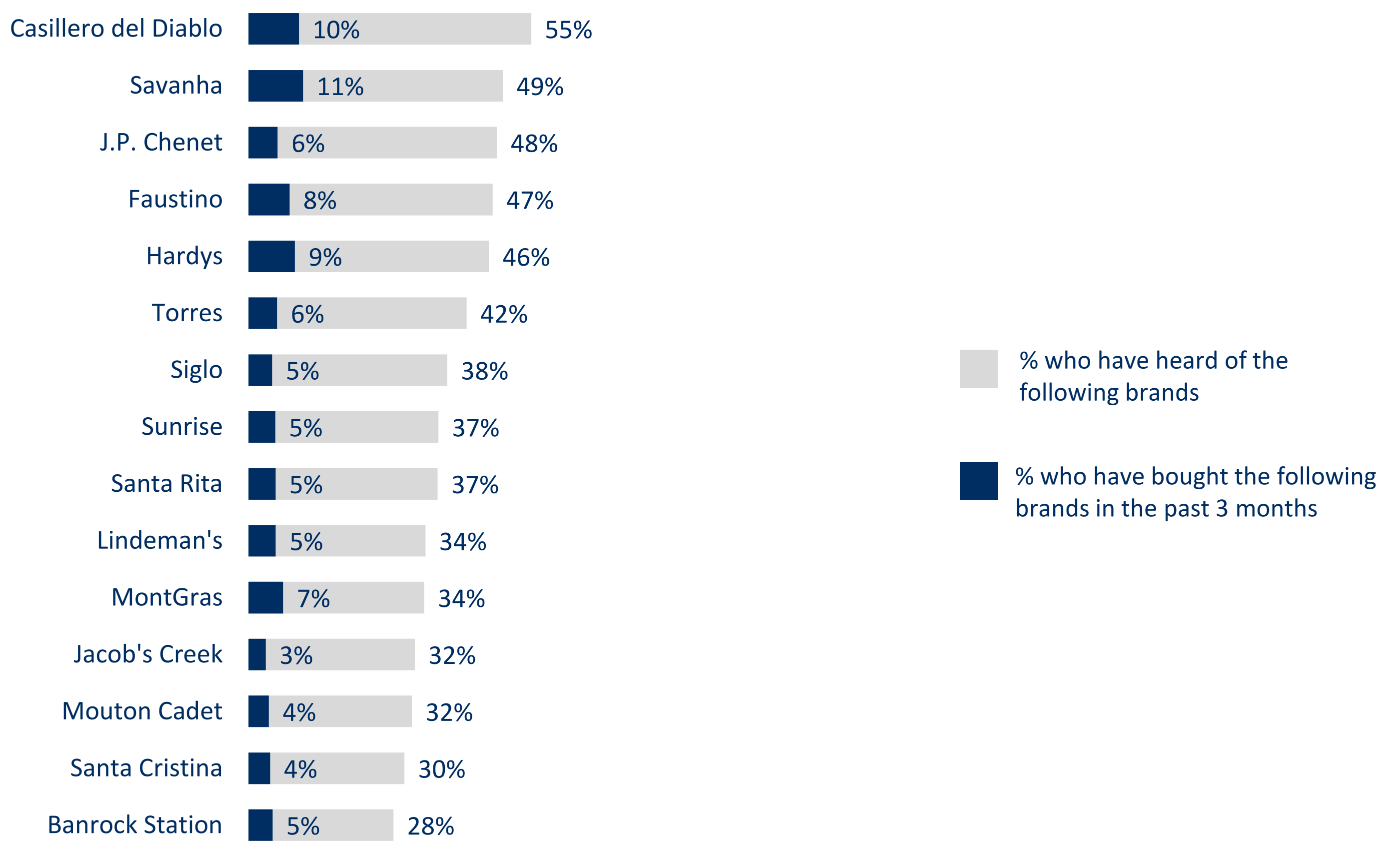
Source: Wine Intelligence, Vinitrac®

BRAND HEALTH: AWARENESS VS. PURCHASE

Purchase incidence is narrow amongst the top 15 brands though awareness levels are more varied

Top 15 brands by **awareness** and respective **purchase** level

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



Source: Wine Intelligence, Vinitrac®, July 2021, (n1=000), Danish regular wine drinkers

BRAND HEALTH: AWARENESS

In line with declining origin awareness, brand awareness has also declined overall in the Danish market; potentially as a result of fewer consumers buying wine in supermarkets

Awareness: Tracking

% who have heard of the following brands
Base = All Danish regular wine drinkers (n=1,000)

Rank 2021	Brand	2017	2018	2021	Tracking vs. '17	Tracking vs. '18
	n=	*1000*	*1000*	*1000*		
1	Casillero del Diablo	62%	66%	55%	↓	↓
2	Savanha	60%	62%	49%	↓	↓
3	J.P. Chenet	53%	58%	48%	↓	↓
4	Faustino	n/a	n/a	47%		
5	Hardys	42%	45%	46%	↑	→
6	Torres	49%	50%	42%	↓	↓
7	Siglo	45%	47%	38%	↓	↓
8=	Sunrise	45%	52%	37%	↓	↓
8=	Santa Rita	34%	35%	37%	→	→
10=	Lindeman's	43%	46%	34%	↓	↓
10=	MontGras	35%	40%	34%	→	↓
12=	Jacob's Creek	41%	43%	32%	↓	↓
12=	Mouton Cadet	37%	37%	32%	↓	↓
14	Santa Cristina	32%	33%	30%	→	→
15=	Banrock Station	29%	31%	28%	→	→
15=	Sutter Home	34%	37%	28%	↓	↓
17=	Yellow Tail	24%	32%	25%	→	↓
17=	Drostdy Hof	26%	29%	25%	→	↓
19	Pinard	n/a	n/a	22%		
20=	Campo Viejo	23%	27%	21%	→	↓
20=	Santa Carolina	14%	18%	21%	↑	→
22	Trapiche	16%	17%	20%	↑	→
23=	Undurraga	22%	22%	18%	↓	→
23=	La Châsse	19%	19%	18%	→	→
23=	Barefoot	n/a	n/a	18%		

Rank 2021	Brand	2017	2018	2021	Tracking vs. '17	Tracking vs. '18
	n=	*1000*	*1000*	*1000*		
26=	Nederburg	16%	21%	17%	→	↓
26=	Wolf Blass	15%	17%	17%	→	→
26=	Beringer	16%	19%	16%	→	→
29=	Viña Esmeralda	n/a	n/a	14%		
29=	RavensWood	15%	17%	14%	→	↓
31=	Gato Negro	14%	19%	13%	→	↓
31=	Gallo Family Vineyards	13%	13%	13%	→	→
31=	Woodbridge	13%	16%	13%	→	→
31=	Periquita	n/a	n/a	13%		
35=	Selaks	10%	13%	11%	→	→
35=	Rocca	n/a	n/a	11%		
35=	Barbadillo	n/a	n/a	11%		
38=	Peñasol	n/a	n/a	10%		
38=	Montes	10%	12%	10%	→	→
38=	Pasqua	8%	9%	10%	→	→
38=	Les dauphins	10%	12%	10%	→	→
42=	Penfolds	7%	7%	9%	↑	↑
42=	Dark Horse	n/a	n/a	9%		
42=	Concha y Toro	n/a	n/a	9%		
45	Maison Castel	n/a	n/a	7%		
46=	Emiliana	n/a	n/a	6%		
46=	Cantina Valpantena	n/a	n/a	6%		
46=	Apothic	n/a	n/a	6%		
49	Kim Crawford	2%	2%	3%	→	→

n/a = brand was not tested during this wave
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2018, July 2021, (n1=000), Danish regular wine drinkers

BRAND HEALTH: PURCHASE

Top brands have also experienced decreases in purchase levels, although not as widespread as the drop in awareness

Purchase: Tracking

% who have bought the following brands in the past 3 months
Base = All Danish regular wine drinkers (n=1,000)

Rank 2021	Brand	2018	2021	Tracking vs. '18
	n=	*1000*	*1000*	
1	Savanha	16%	11%	↓
2	Casillero del Diablo	14%	10%	↓
3=	Hardys	12%	9%	↓
3=	Yellow Tail	10%	9%	→
3=	Barefoot	n/a	9%	
6	Faustino	n/a	8%	
7	MontGras	8%	7%	→
8=	J.P. Chenet	9%	6%	↓
8=	Torres	7%	6%	→
10=	Lindeman's	7%	5%	→
10=	Santa Rita	5%	5%	→
10=	Sunrise	11%	5%	↓
10=	Banrock Station	7%	5%	↓
10=	Siglo	6%	5%	→
10=	Santa Cristina	5%	4%	→
10=	Trapiche	3%	4%	→
10=	Viña Esmeralda	n/a	4%	
10=	Mouton Cadet	4%	4%	→
10=	Wolf Blass	4%	4%	→
20=	Jacob's Creek	6%	3%	↓
20=	Santa Carolina	2%	3%	→
20=	Drostdy Hof	6%	3%	↓
20=	Sutter Home	5%	3%	→
20=	Nederburg	3%	3%	→
20=	Rocca	n/a	3%	

Rank 2021	Brand	2018	2021	Tracking vs. '18
	n=	*1000*	*1000*	
26=	Pinard	n/a	2%	
26=	Undurraga	2%	2%	→
26=	Campo Viejo	3%	2%	→
26=	La Châsse	2%	2%	→
26=	Selaks	3%	2%	→
26=	RavensWood	3%	2%	→
26=	Woodbridge	2%	2%	→
26=	Montes	1%	2%	→
26=	Peñasol	n/a	2%	
26=	Penfolds	2%	2%	→
26=	Barbadillo	n/a	2%	
26=	Les dauphins	2%	2%	→
26=	Beringer	2%	2%	→
26=	Apothic	n/a	2%	
26=	Dark Horse	n/a	2%	
41=	Gato Negro	2%	1%	→
41=	Cantina Valpantena	n/a	1%	
41=	Emiliana	n/a	1%	
41=	Maison Castel	n/a	1%	
41=	Concha y Toro	n/a	1%	
41=	Pasqua	2%	1%	→
41=	Kim Crawford	0%	1%	↑
41=	Gallo Family Vineyards	1%	1%	→
41=	Periquita	n/a	1%	

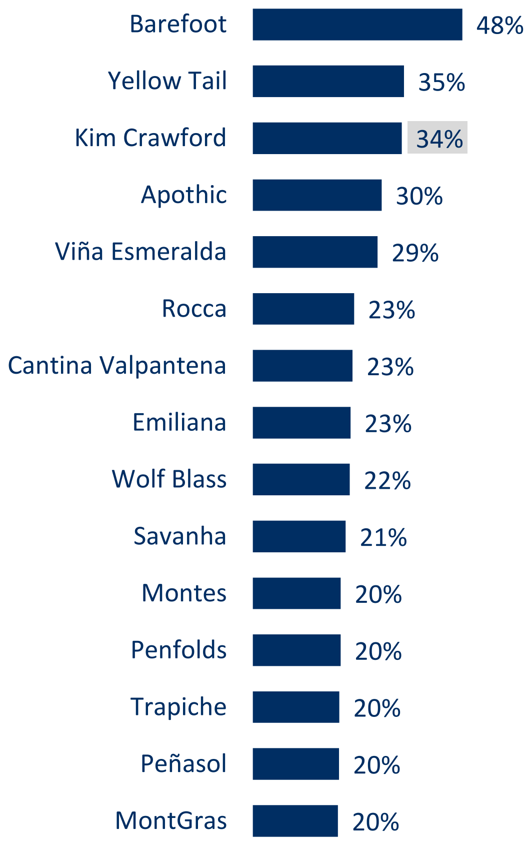
Brand purchase data not collected in 2017
n/a = brand was not tested during this wave
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2018, July 2021, (n1=000), Danish regular wine drinkers

BRAND HEALTH: CONVERSION

Barefoot has the highest conversion rate in the Danish market by a large margin, with conversion levels quite narrow outside the top 5 brands

Conversion: Top 15 brands

% who have bought the following brands in the past 3 months
Base = Those who have heard of each brand



*"Which of these brands **have you bought** in the past 3 months?"*

Grey shading: Low sample size (n<50)
Source: Wine Intelligence, Vinitrac®, July 2021, (n1=000), Danish regular wine drinkers

BRAND HEALTH: CONVERSION

As both awareness and purchase levels experienced declines, conversion to purchase has remained stable for most brands since 2018

Conversion: Tracking

% who have bought the following brands in the past 3 months
Base = Those who have heard of each brand

Rank 2021	Brand	2018	2021	Tracking vs. '18
1	Barefoot	n/a	48%	
2	Yellow Tail	33%	35%	→
3	Kim Crawford	11%	34%	→
4	Apothic	n/a	30%	
5	Viña Esmeralda	n/a	29%	
6=	Rocca	n/a	23%	
6=	Cantina Valpantena	n/a	23%	
6=	Emiliana	n/a	23%	
9	Wolf Blass	24%	22%	→
10	Savanha	25%	21%	→
11=	Montes	10%	20%	↑
11=	Penfolds	25%	20%	→
11=	Trapiche	15%	20%	→
11=	Peñasol	n/a	20%	
11=	MontGras	20%	20%	→
11=	Selaks	20%	20%	→
17=	Hardys	26%	19%	↓
17=	Les dauphins	20%	19%	→
19=	Casillero del Diablo	21%	18%	→
19=	Maison Castel	n/a	18%	
21=	Barbadillo	n/a	17%	
21=	Dark Horse	n/a	17%	
21=	Faustino	n/a	17%	
21=	Banrock Station	23%	17%	↓
25=	RavensWood	19%	16%	→
25=	Woodbridge	11%	16%	→
27=	Lindeman's	16%	15%	→
27=	Nederburg	14%	15%	→
27=	Santa Carolina	11%	15%	→
27=	Santa Rita	13%	14%	→
27=	Sunrise	21%	14%	↓
27=	Concha y Toro	n/a	14%	
27=	Santa Cristina	14%	14%	→
34=	Torres	15%	13%	→
34=	Undurraga	10%	13%	→
34=	La Châsse	13%	13%	→
37=	Mouton Cadet	12%	12%	→
37=	Drostdy Hof	20%	12%	↓
37=	Siglo	13%	12%	→
37=	J.P. Chenet	16%	12%	→
37=	Pasqua	16%	12%	→
42=	Campo Viejo	12%	11%	→
42=	Pinard	n/a	11%	
42=	Beringer	13%	11%	→
42=	Sutter Home	12%	11%	→
42=	Gato Negro	10%	11%	→
47	Jacob's Creek	15%	10%	→
48	Gallo Family Vineyards	8%	8%	→
49	Periquita	n/a	7%	

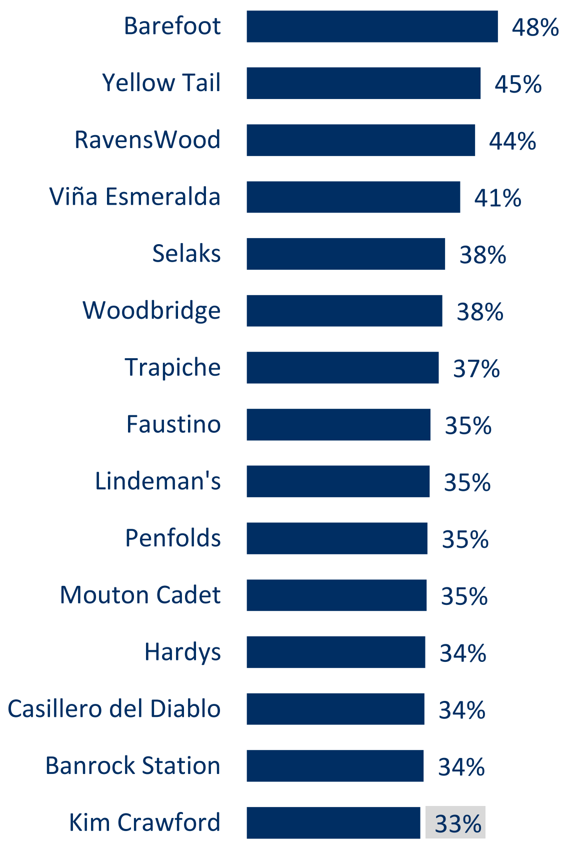
Brand conversion data not collected in 2017
n/a = brand was not tested during this wave
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2018, July 2021, (n1=000), Danish regular wine drinkers

BRAND HEALTH: CONSIDERATION

In line with other measures, consideration incidence is narrow outside of the top few brands, suggesting Danish consumers are very open to trying new brands

Consideration: Top 15 brands

% who would consider buying the following brands
Base = Those who have heard of each brand



"Which of the following brands would you consider buying?"

Grey shading: Low sample size (n<50)
Source: Wine Intelligence, Vinitrac®, July 2021, (n1=000), Danish regular wine drinkers

BRAND HEALTH: CONSIDERATION

Though brands are experiencing declines in other measures, consideration incidences have remained broadly stable apart from a few brands which have seen increases

Consideration: Tracking

% who would consider buying the following brands
Base = Those who have heard of each brand

Rank 2021	Brand	2017	2018	2021	Tracking vs. '17	Tracking vs. '18
1	Barefoot	n/a	n/a	48%		
2	Yellow Tail	38%	50%	45%	→	→
3	RavensWood	36%	53%	44%	→	→
4	Viña Esmeralda	n/a	n/a	41%		
5=	Selaks	40%	45%	38%	→	→
5=	Woodbridge	22%	37%	38%	↑	→
7	Trapiche	27%	35%	37%	↑	→
8=	Faustino	n/a	n/a	35%		
8=	Lindeman's	28%	36%	35%	↑	→
8=	Penfolds	32%	50%	35%	→	→
8=	Mouton Cadet	31%	37%	35%	→	→
12=	Hardys	30%	43%	34%	→	↓
12=	Casillero del Diablo	29%	39%	34%	→	→
12=	Banrock Station	27%	42%	34%	→	→
15=	Kim Crawford	23%	17%	33%	→	→
15=	Wolf Blass	31%	53%	33%	→	↓
15=	Savanha	33%	36%	33%	→	→
18=	Barbadillo	n/a	n/a	32%		
18=	Concha y Toro	n/a	n/a	32%		
20=	Santa Rita	24%	33%	31%	→	→
20=	Beringer	19%	42%	31%	↑	↓
22=	La Châsse	22%	26%	30%	→	→
22=	Siglo	26%	31%	30%	→	→
24=	Torres	30%	33%	29%	→	→
24=	Undurraga	24%	32%	29%	→	→

Rank 2021	Brand	2017	2018	2021	Tracking vs. '17	Tracking vs. '18
24=	Apothic	n/a	n/a	29%		
24=	Gallo Family Vineyards	16%	28%	29%	↑	→
28=	Jacob's Creek	28%	43%	28%	→	↓
28=	Campo Viejo	23%	29%	28%	→	→
28=	Sunrise	23%	35%	28%	→	↓
28=	Gato Negro	22%	33%	28%	→	→
28=	MontGras	24%	38%	28%	→	↓
28=	Maison Castel	n/a	n/a	28%		
34=	Pasqua	22%	33%	27%	→	→
34=	Peñasol	n/a	n/a	27%		
36=	Sutter Home	15%	30%	26%	↑	→
36=	Les dauphins	28%	39%	26%	→	↓
36=	Emiliana	n/a	n/a	26%		
36=	Periquita	n/a	n/a	25%		
36=	Santa Cristina	24%	27%	25%	→	→
36=	Cantina Valpantena	n/a	n/a	25%		
36=	Drostdy Hof	19%	31%	25%	→	→
36=	J.P. Chenet	23%	28%	25%	→	→
36=	Rocca	n/a	n/a	25%		
36=	Dark Horse	n/a	n/a	25%		
46	Nederburg	20%	24%	24%	→	→
47=	Santa Carolina	17%	26%	23%	→	→
47=	Pinard	n/a	n/a	23%		
49	Montes	18%	27%	19%	→	→

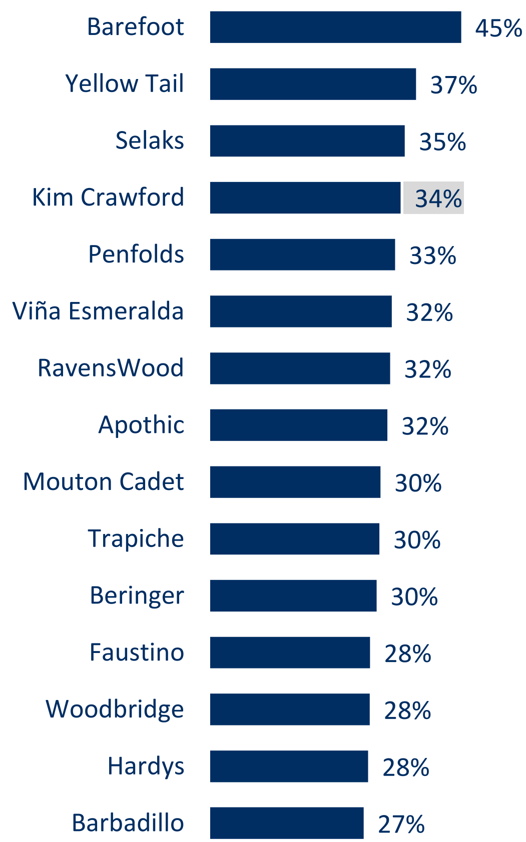
Grey shading: Low sample size (n<50)
n/a = brand was not tested during this wave
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2018, July 2021, (n1=000), Danish regular wine drinkers

BRAND HEALTH: AFFINITY

In line with other measures, Barefoot tops the brand list in terms of the proportion of consumers who feel it is right for people like them

Affinity: Top 15 brands

% who think the following brands are right for people like them
Base = Those who have heard of each brand



"Which of these brands do you think are right for a person like you?"

Grey shading: Low sample size (n<50)
Source: Wine Intelligence, Vinitrac®, July 2021, (n1=000), Danish regular wine drinkers

BRAND HEALTH: AFFINITY

Affinity levels have remained broadly stable in the Danish market since 2017

Affinity: Tracking

% who think the following brands are right for people like them
Base = Those who have heard of each brand

Rank 2021	Brand	2017	2018	2021	Tracking vs. '17	Tracking vs. '18
1	Barefoot	n/a	n/a	45%		
2	Yellow Tail	40%	39%	37%	→	→
3	Selaks	38%	41%	35%	→	→
4	Kim Crawford	27%	14%	34%	→	→
5	Penfolds	31%	40%	33%	→	→
6=	Viña Esmeralda	n/a	n/a	32%		
6=	RavensWood	32%	31%	32%	→	→
6=	Apothic	n/a	n/a	32%		
9=	Mouton Cadet	31%	29%	30%	→	→
9=	Trapiche	25%	29%	30%	→	→
9=	Beringer	19%	29%	30%	↑	→
12=	Faustino	n/a	n/a	28%		
12=	Woodbridge	23%	25%	28%	→	→
12=	Hardys	29%	31%	28%	→	→
15=	Barbadillo	n/a	n/a	27%		
15=	MontGras	23%	27%	27%	→	→
15=	Savanha	33%	27%	27%	↓	→
18=	Emiliana	n/a	n/a	25%		
18=	Lindeman's	24%	26%	25%	→	→
18=	Les dauphins	30%	30%	25%	→	→
18=	Banrock Station	28%	32%	25%	→	↓
22=	Casillero del Diablo	29%	24%	24%	→	→
22=	Undurraga	24%	19%	24%	→	→
22=	Nederburg	15%	15%	24%	↑	↑
25=	Torres	29%	24%	23%	→	→
25=	Cantina Valpantena	n/a	n/a	23%		
27	Wolf Blass	33%	38%	22%	↓	↓
28=	Santa Rita	20%	22%	21%	→	→
28=	Sunrise	26%	25%	21%	→	→
30=	Gallo Family Vineyards	18%	16%	20%	→	→
30=	Periquita	n/a	n/a	20%		
30=	Siglo	22%	23%	20%	→	→
30=	Jacob's Creek	27%	29%	20%	↓	↓
30=	Drostdy Hof	21%	22%	20%	→	→
35=	La Châsse	19%	18%	19%	→	→
35=	Santa Cristina	26%	21%	19%	↓	→
35=	J.P. Chenet	21%	21%	19%	→	→
38=	Gato Negro	22%	13%	18%	→	→
38=	Campo Viejo	21%	19%	18%	→	→
38=	Pinard	n/a	n/a	18%		
41=	Santa Carolina	18%	18%	17%	→	→
41=	Sutter Home	17%	19%	17%	→	→
43=	Maison Castel	n/a	n/a	16%		
43=	Rocca	n/a	n/a	16%		
45	Dark Horse	n/a	n/a	15%		
46	Peñasol	n/a	n/a	14%		
47=	Pasqua	24%	21%	12%	↓	→
47=	Concha y Toro	n/a	n/a	12%		
49	Montes	17%	17%	10%	→	→

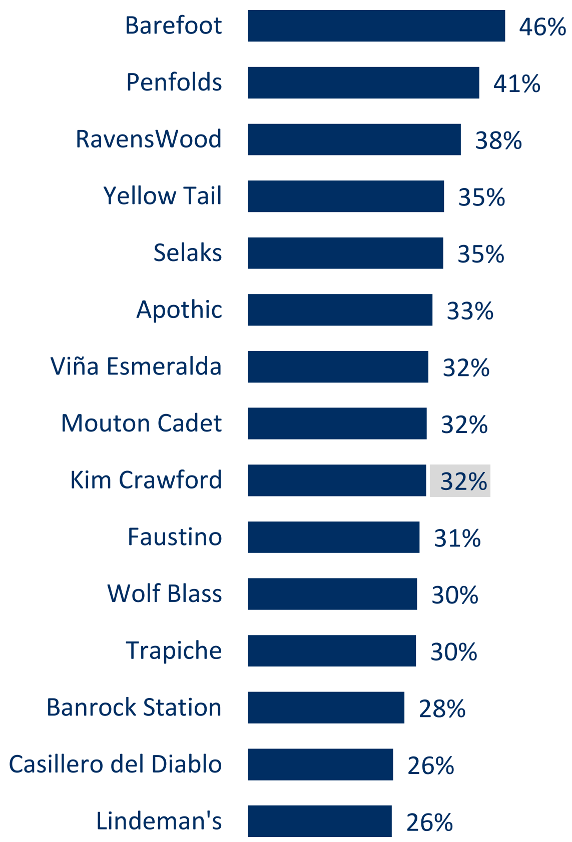
Grey shading: Low sample size (n<50)
n/a = brand was not tested during this wave
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2018, July 2021, (n1=000), Danish regular wine drinkers

BRAND HEALTH: RECOMMENDATION

Barefoot also tops the list in terms of those who would recommend it to a friend

Recommendation: Top 15 brands

% who would recommend the following brands to a friend
Base = Those who have heard of each brand



"Which of these brands would you recommend to a friend?"

Grey shading: Low sample size (n<50)
Source: Wine Intelligence, Vinitrac®, July 2021, (n1=000), Danish regular wine drinkers

BRAND HEALTH: RECOMMENDATION

In like with affinity, recommendation levels have remained stable for most brands

Recommendation: Tracking

% who would recommend the following brands to a friend
Base = Those who have heard of each brand

Rank 2021	Brand	2017	2018	2021	Tracking vs. '17	Tracking vs. '18
1	Barefoot	n/a	n/a	46%		
2	Penfolds	34%	40%	41%	→	→
3	RavensWood	36%	40%	38%	→	→
4=	Yellow Tail	41%	43%	35%	→	→
4=	Selaks	42%	34%	35%	→	→
6	Apothic	n/a	n/a	33%		
7=	Viña Esmeralda	n/a	n/a	32%		
7=	Mouton Cadet	34%	33%	32%	→	→
7=	Kim Crawford	28%	26%	32%	→	→
10	Faustino	n/a	n/a	31%		
11=	Wolf Blass	32%	40%	30%	→	↓
11=	Trapiche	27%	27%	30%	→	→
13	Banrock Station	30%	29%	28%	→	→
14=	Casillero del Diablo	31%	28%	26%	→	→
14=	Lindeman's	28%	24%	26%	→	→
16=	Beringer	28%	36%	25%	→	↓
16=	Woodbridge	25%	27%	25%	→	→
16=	Hardys	28%	33%	25%	→	↓
19=	Gallo Family Vineyards	22%	19%	24%	→	→
19=	Siglo	25%	24%	24%	→	→
19=	Les dauphins	33%	23%	24%	→	→
19=	MontGras	25%	24%	24%	→	→
23	Savanha	30%	27%	23%	↓	→
24	Jacob's Creek	28%	30%	22%	→	↓
25=	Emiliana	n/a	n/a	21%		
25=	Nederburg	21%	16%	21%	→	→
25=	Sunrise	24%	22%	21%	→	→
28=	Rocca	n/a	n/a	20%		
28=	Dark Horse	n/a	n/a	20%		
28=	Undurraga	22%	16%	20%	→	→
28=	Barbadillo	n/a	n/a	20%		
32=	Torres	31%	24%	19%	↓	→
32=	Santa Carolina	24%	14%	19%	→	→
32=	Drostdy Hof	21%	21%	19%	→	→
32=	Concha y Toro	n/a	n/a	19%		
32=	J.P. Chenet	22%	21%	19%	→	→
37=	Peñasol	n/a	n/a	18%		
37=	Gato Negro	25%	18%	18%	→	→
37=	La Châsse	22%	13%	18%	→	→
37=	Campo Viejo	26%	22%	18%	↓	→
37=	Maison Castel	n/a	n/a	18%		
37=	Santa Rita	24%	22%	18%	↓	→
43=	Sutter Home	20%	17%	17%	→	→
43=	Cantina Valpantena	n/a	n/a	17%		
43=	Montes	20%	18%	17%	→	→
46=	Santa Cristina	22%	16%	16%	↓	→
46=	Periquita	n/a	n/a	16%		
46=	Pinard	n/a	n/a	16%		
49	Pasqua	21%	18%	14%	→	→

Grey shading: Low sample size (n<50)
n/a = brand was not tested during this wave
↑ / ↓ : Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, July 2017, July 2018, July 2021, (n1=000), Danish regular wine drinkers

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RESEARCH METHODOLOGY: QUANTITATIVE

The data was collected in Denmark in July 2017, July 2018 and July 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 Danish regular wine drinkers in terms of gender and age

The distribution of the sample is shown in the table:

			Jul-17	*Jul-18*	*Jul-21*
		n=	***1,000***	***1,000***	***1,000***
Gender	Male		53%	53%	51%
	Female		47%	47%	49%
	Total		***100%***	***100%***	***100%***
Age	18-24		8%	8%	8%
	25-34		15%	15%	11%
	35-44		14%	14%	12%
	45-54		19%	19%	15%
	55 and over		44%	44%	54%
	Total		***100%***	***100%***	***100%***

Source: Wine Intelligence, Vinitrac® Denmark, July 2017 (n=1,000), July 2018 (n=1,000), July 2021 (n=1,000), Danish regular wine drinkers

RESEARCH METHODOLOGY: QUALITITATIVE

MARKET EXPERT INTERVIEWEES

Market Interviews were conducted with five experienced industry professionals in the Danish 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 wine industry professionals working within the market in different roles:

1 x Wine Importer

2 x Wine Journalist

1 x Marketing Manager

1 x Wine Educator

Wine Intelligence Ltd Terms and Conditions of Licence for Syndicated Research Products – key sections

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