wine intelligence

A division of the IWSR Group

Finland

Wine Landscapes 2023

Contents

Wine Intelligence Viewpoint

Demographic shifts and a shrinking wine drinking population impact buying behaviours in Finland

The size of the Finnish regular and weekly wine drinking population is shrinking, both in absolute terms and as a proportion of the adult population. This has been accompanied by a decline in wine volumes and a fall in total beverage alcohol, suggesting an overall decline in drinking.

The population losses have come at the top of the age range, with the proportion of wine drinkers aged under 40 increasing from 28% in 2020 to 36% in 2023. This bucks the ageing trend seen in many other developed markets and suggests that the category is capable of recruiting younger drinkers.

This shift in demographics has had an impact on wine drinking behaviours in Finland. The on-trade has positive momentum, with consumption frequency growing from 2020. Off-trade consumption at parties and celebrations has also increased.

However, younger wine drinkers appear to be more price-conscious, and less knowledgeable and confident about the category. For them, wine is a social drink that they enjoy but may not know much about. This is reflected in significantly lower awareness of mainstream brands. A challenge for brands will be to build loyalty with this new group of wine drinkers.

Opportunities

Ability of wine category to recruit Gen Z.
Positive momentum in the on-trade.
Special occasions in the off-trade.

Threats

More price-conscious wine shoppers.
Declining knowledge and confidence.
Overall alcohol consumption falling.

Management Summary

Finland Wine Landscapes

2023

Management summary

Key takeaways

1. Shrinking wine drinking population in Finland

2. Volumes of wine sold in the Finnish market are in decline

3. Finnish wine drinkers are getting younger

4. Attitudes towards wine are changing

5. Knowledge and confidence are decreasing

6. Reasons to drink wine are changing

1. Shrinking wine drinking population in Finland

Despite the size of the overall adult population increasing, the number of participants in the wine category has decreased. Both the monthly and weekly wine drinking population have shrunk by around 200,000 since 2017

Decline in wine drinking population

Those who drink wine at least once a month

1 Wine Intelligence online calibration study, Feb 2017 & March 2023 (n>1,007) Finnish adults. Wine=still light wine (red, white, rosé)
2 Wine Intelligence, Vinitrac® Finland Oct '17, Feb' 23 (n>1,000) Finnish regular wine drinkers

2. Volumes of wine sold in the Finnish market are in decline

The total amount of alcohol sold in Finland declined between 2017 and 2022, and the wine category was affected. Wine saw a decrease in volumes of 0.6% over that period. This could be attributed to the smaller wine drinking population in the country

Total beverage alcohol market volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total beverage alcohol	62,215.20	59,378.70	-0.9%	-1.2%
Beer	43,144.44	41,190.00	-1.2%	-1.3%
Wine*	7,131.37	6,713.98	-0.6%	-0.3%
RTDs	6,378.56	6,244.43	6.5%	0.1%
Cider	3,006.67	2,728.33	-8.1%	-4.7%
Spirits**	2,554.17	2,501.93	-0.9%	-0.9%

Market context:

The drinks industry in Finland experienced a fall in sales volume in 2022, with levels still lower than 2019, mainly due to a decline in the wine category. The country opened up in mid-March 2022, which had a negative impact on the monopoly and other off-trade businesses.

Executive Summary Report 2023 Finland

Source: IWSR

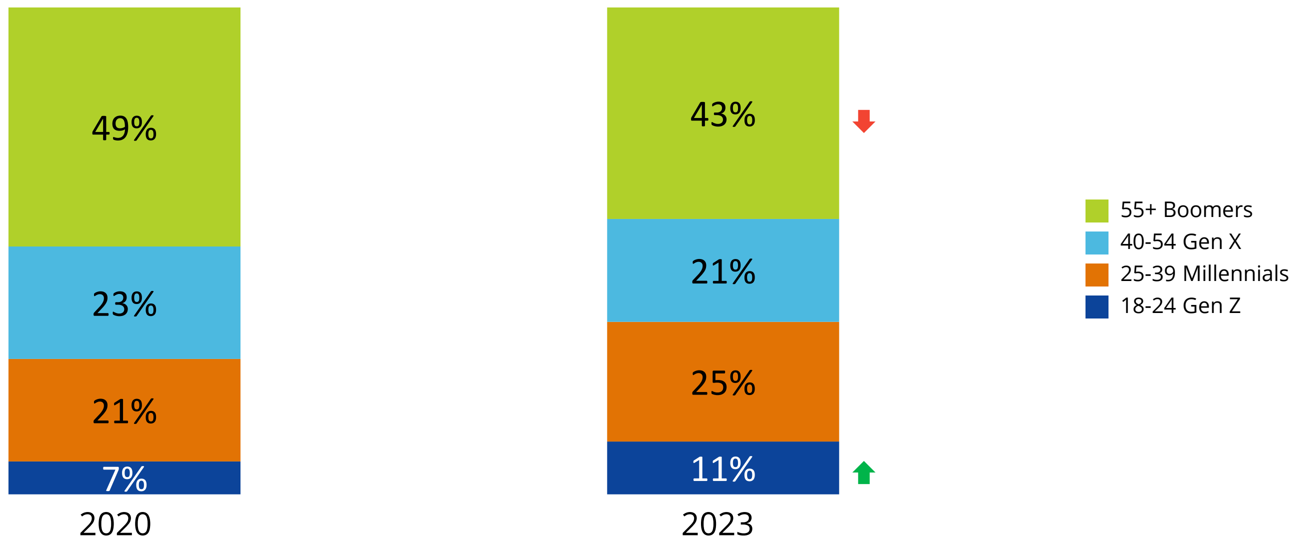
* Wine includes non-grape based wines, still wine, sparkling wine, fortified wine and light aperitifs

** Spirits include whisky, gin and genever, vodka, agave-based spirits, national spirits, rum, cane, brandy and flavored spirits

3. Finnish wine drinkers are getting younger

Since 2020, younger age groups have made up a greater proportion of regular wine drinkers. Currently, 11% of our respondents are aged between 18 and 24, up from 7% in 2020. At the same time, the 55-plus wine-drinking population has fallen, contrary to the prevailing global trend. Older drinkers leaving the category could also explain the overall shrinking wine drinking population

Generation cohorts



↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Feb '23, (n≥1,002) Finnish regular wine drinkers

4. Attitudes towards wine are changing

Finnish RWDs are increasingly price-conscious about wine. This is most common among Gen Z, who are a growing proportion of the wine-drinking population

Attitudes towards wine: Tracking

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

	2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
I enjoy trying new and different styles of wine on a regular basis	47%	48%	44%	→	→
I don't mind what I buy so long as the price is right	15%	16%	19%	↑	↑
I know what I like and I tend to stick to what I know	38%	37%	37%	→	→

Attitudes towards wine by generation

% who 'agree' or 'strongly agree' with the following statements
Base = All Finnish regular wine drinkers (n=1,014)

	All Finnish regular wine drinkers (n=1,014)	18-24 Gen Z (n=110)	25-39 Millennials (n=249)	40-54 Gen X (n=214)	55+ Boomers (n=441)
I enjoy trying new and different styles of wine on a regular basis	44%	52%	54%	47%	35%
I don't mind what I buy so long as the price is right	19%	27%	21%	20%	16%
I know what I like and I tend to stick to what I know	37%	20%	25%	33%	50%

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

5. Knowledge and confidence are decreasing

Perhaps because of more young people entering the category, the knowledge base of regular wine drinkers in Finland has decreased significantly since 2020. This could also be a knock-on effect of older and more experienced drinkers leaving the category. Confidence has also significantly decreased, probably because of the increase in younger drinkers

Wine knowledge index: Tracking

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

	2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
Knowledge Index	46.7	45.3	40.8	⬇	⬇

Wine knowledge index (0–100) is calculated based on consumer-reported awareness of wine-growing regions and wine brands.
Wine knowledge index is the 'objective' measurement of consumer knowledge about wine.

-6.0 Index change

Wine confidence index: Tracking

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

	2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
Confidence Index	47.0	46.8	44.6	⬇	⬇

Wine confidence index (0–100) is calculated based on the extent to which consumers feel competent 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.
Wine confidence index is the 'subjective' measurement of consumer confidence about their wine knowledge.

-2.4 Index change

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

6. Reasons to drink wine are changing

Significantly fewer respondents are drinking wine for pleasure or have a strong interest in wine compared with 2021. The number of drinkers for whom wine is important to their lifestyle has increased since 2021. This could mean that wine is becoming appreciated more for qualities other than the drink itself

Involvement and perceived expertise in wine: Tracking

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

Ranking '23		2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
1	Drinking wine gives me pleasure	88%	92%	86%	→	↓
2	I like to take my time when I purchase a bottle of wine	80%	82%	81%	→	→
3	I always look for the best quality wines I can get for my budget	72%	72%	69%	→	→
4	Deciding which wine to buy is an important decision	64%	68%	64%	→	↓
5	Generally speaking, wine is reasonably priced	60%	61%	59%	→	→
6	I don't understand much about wine	44%	45%	51%	↑	↑
7	I have a strong interest in wine	46%	49%	44%	→	↓
8	Generally speaking, wine is an expensive drink	33%	38%	37%	↑	→
9	Compared to others, I know less about the subject of wine	31%	33%	36%	↑	→
10	Wine is important to me in my lifestyle	23%	28%	32%	↑	→
11	I feel competent about my knowledge of wine	28%	29%	27%	→	→

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

Management summary: tracking metrics

Fewer respondents are drinking red wine than in previous years; there is less consumption of wines from Chile and Spain

Top alcoholic beverages

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

	2020	2023	Tracking
White wine	**85%**	**86%**	→
Red wine	**89%**	**84%**	↓
Beer	**78%**	**79%**	→
Cider	**58%**	**54%**	→
Vodka	**48%**	**49%**	→

Top country of origin

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

	2020	2023	Tracking
Chile	**64%**	**52%**	↓
Spain	**57%**	**50%**	↓
Italy	**50%**	**47%**	→
France	**44%**	**44%**	→
Germany	**33%**	**30%**	→

Top region of origin

% who have brought wine from the following regions in the past three months

	2020	2023	Tracking
Prosecco	**21%**	**24%**	→
Bordeaux	**22%**	**23%**	→
Rioja	**19%**	**15%**	↓
Champagne	**13%**	**14%**	→
Chianti	**15%**	**13%**	→

Top wine brands

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

	2020	2023	Tracking
Gato Negro	**25%**	**27%**	→
J.P. Chenet	**24%**	**22%**	→
Black Tower	**15%**	**17%**	→
Casillero del Diablo	**19%**	**17%**	→
El Tiempo	**11%**	**12%**	→

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

Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Feb '23, (n≥1,002) Finnish regular wine drinkers

Management summary: tracking metrics

Finnish regular wine drinkers are consuming a narrower range of varietals than in 2020

Top red varietals

% who have drunk the following varietals in the past six months

	2020	2023	Tracking
Cabernet Sauvignon	**52%**	**42%**	↓
Merlot	**50%**	**42%**	↓
Pinot Noir	**46%**	**41%**	↓
Shiraz / Syrah	**47%**	**34%**	↓
Tempranillo	**22%**	**21%**	→

Top wine-shopping channels

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

	2020	2023	Tracking
From an Alko shop	**87%**	**88%**	→
From a ferry / cruise	**31%**	**26%**	↓
In person from a retailer in Estonia	**19%**	**13%**	↓
From Duty Free (eg airports)	**14%**	**10%**	↓
In person from another overseas retailer	**13%**	**10%**	↓

Top white varietals

% who have drunk the following varietals in the past six months

	2020	2023	Tracking
Riesling	**53%**	**51%**	→
Chardonnay	**53%**	**46%**	↓
Sauvignon Blanc	**50%**	**43%**	↓
Pinot Grigio / Pinot Gris	**29%**	**27%**	→
Chenin Blanc	**13%**	**14%**	→

Wine choice cues

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

	2020	2023	Tracking
Taste / wine style descriptions on shelves / wine labels	**79%**	**76%**	→
Wine that matches or compliments food	**77%**	**73%**	↓
A brand I am aware of	**72%**	**68%**	↓
Recommendation by friend or family	**65%**	**60%**	↓
The country of origin	**65%**	**57%**	↓

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

Source: Wine Intelligence, Vinitrac®, Finland, Jan ’20, Feb ’23, (n≥1,002) Finnish regular wine drinkers

Market Data

Finland Wine Landscapes

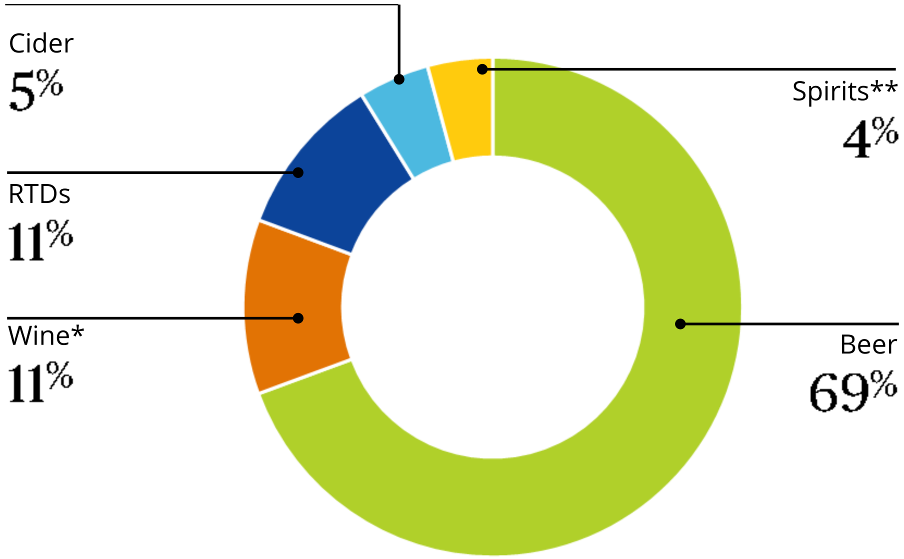
2023

Total beverage alcohol market share by category

Total alcohol volumes have declined over the past five years and are projected to continue to do so; there has been strong growth for RTDs and this momentum is expected to continue, if at a more sedate pace

Total beverage alcohol market share by category

% of purchases that fall within the categories below



Total beverage alcohol market volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total beverage alcohol	62,215.20	59,378.70	-0.9%	-1.2%
Beer	43,144.44	41,190.00	-1.2%	-1.3%
Wine*	7,131.37	6,713.98	-0.6%	-0.3%
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Cider	3,006.67	2,728.33	-8.1%	-4.7%
Spirits**	2,554.17	2,501.93	-0.9%	-0.9%

Source: IWSR

* Wine includes non-grape based wines, still wine, sparkling wine, fortified wine and light aperitifs

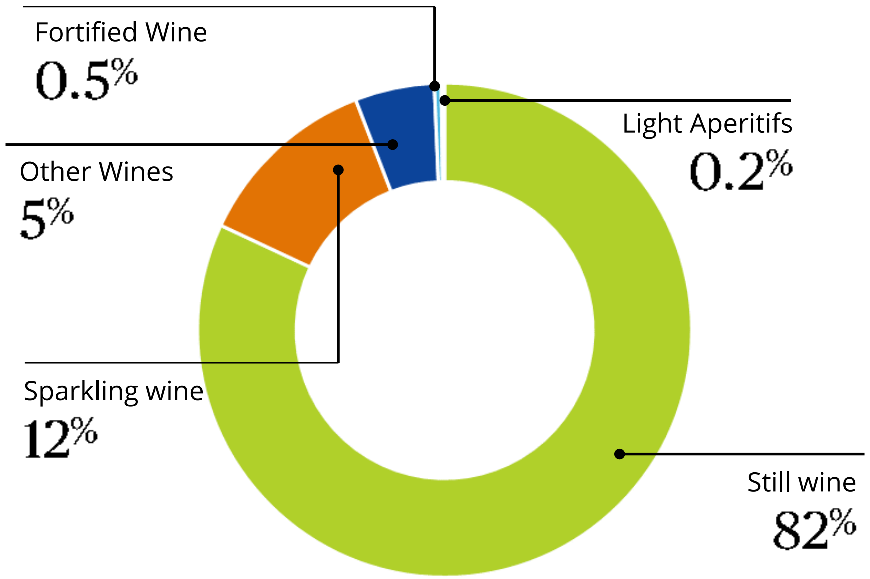
** Spirits include whisky, gin and genever, vodka, agave-based spirits, national spirits, rum, cane, brandy and flavored spirits

Total wine market volumes

Still wine comprises the largest share of the category in Finland; volumes are relatively stable, if slightly declining; sparkling wine is seeing growth, and this is expected to continue in the coming years

Total wine share by category

% of purchases that fall within the categories below



Total wine volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total Wine	7,131.37	6,713.98	-0.6%	-0.3%
Still Wine	5,865.00	5,503.40	-0.5%	-0.2%
Sparkling Wine	850.27	816.74	1.4%	0.7%
Other Wines	367.90	349.01	-5.5%	-2.6%
Fortified Wine	33.32	30.49	-3.4%	-2.8%
Light Aperitifs	14.88	14.34	0.5%	-1.3%

Other Wines includes non-grape based wines
Source: IWSR

Still wine volumes by origin

Chile has the largest volume share, but no country is clearly dominant; wines from Old World origins are favoured generally, with Germany and Portugal seeing strong growth over the past five years

Total still wine volumes and market share by origin

000s 9-litre cases

		2021	2022	CAGR 17-22	CAGR F 22-27	Market Share
	Total	**5,865.00**	**5,503.40**	-0.5%	-0.2%	
1	Chilean	**1,288.10**	**1,182.01**	-3.2%	-1.2%	**21%**
2	Italian	**910.95**	**828.95**	0.8%	0.7%	**15%**
3	Spanish	**802.11**	**763.22**	2.8%	-0.8%	**14%**
4	German	**601.05**	**589.30**	8.0%	0.8%	**11%**
5	Portuguese	**446.75**	**473.55**	28.9%	0.4%	**9%**
6	Australian	**479.95**	**465.70**	-3.2%	-0.6%	**8%**
7	French	**392.68**	**350.89**	-3.7%	0.8%	**6%**
8	South African	**366.85**	**315.20**	-12.9%	-1.4%	**6%**
9	US	**208.35**	**195.33**	-4.0%	0.3%	**4%**
10	Argentinian	**172.85**	**157.60**	-8.4%	-2.2%	**3%**

*International refers to wine where grapes are from multiple countries of origin

Source: IWSR

Still wine retail price by origin

The price point of still wine per bottle has increased in the Finnish market, with the largest rise coming from Italian wine

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a variable exchange rate

		Retail price per 0.75l 2022 (US$)	CAGR 17-22	CAGR F 22-27
	Total	10.44	2.3%	0.1%
1	Chilean	9.33	1.6%	-0.1%
2	Italian	12.20	4.3%	0.1%
3	Spanish	10.04	0.4%	0.0%
4	German	10.08	2.5%	0.0%
5	Portuguese	10.21	2.0%	0.0%
6	Australian	10.64	1.2%	0.1%
7	French	12.62	3.0%	-0.3%
8	South African	8.76	1.0%	0.0%
9	US	11.01	4.1%	0.1%
10	Argentinian	10.67	3.5%	0.0%

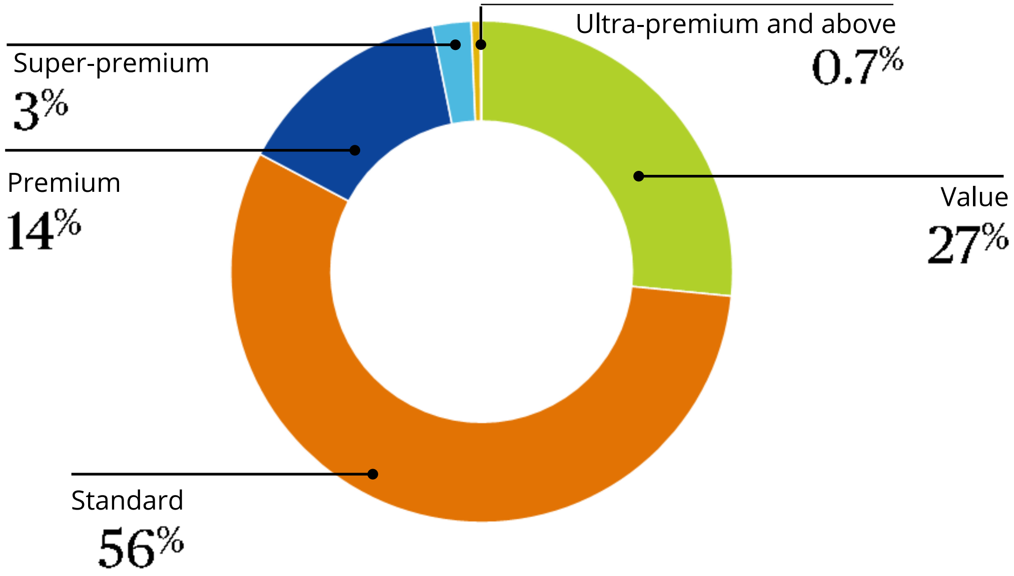
Source: IWSR

Still wine by price band

The majority of wine bought in Finland falls into the value or standard price bands that are suitable for everyday occasions; there are signs that value wines are on the decline as super-premium grows

Still wine by price band

% of purchases that fall within the categories below



Still wine volumes by price band

'000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Value (€7.99 and below)	**1,560.04**	**1,461.58**	**-1.3%**	**-0.1%**
Standard (between €8.00 and €11.99)	**3,292.52**	**3,093.55**	**-0.7%**	**-0.5%**
Premium (between €12.00 and €16.99)	**836.53**	**774.63**	**1.1%**	**-0.1%**
Super Premium (between €17.00 and €21.99)	**141.32**	**137.15**	**3.7%**	**1.5%**
Ultra Premium (between €22.00 and €39.99)	**31.47**	**32.71**	**2.2%**	**1.9%**
Prestige (€40.00 and above)	**3.12**	**3.78**	**1.3%**	**0.5%**

Market context:

Premiumisation continued in the ultra-premium price band and above as opportunities to buy these wines in travel retail were limited. The value segment showed resilience, indicating, with down-trading from mid-range wines due to the cost-of-living crisis.

Executive Summary Report 2023 Finland

Source: IWSR

Still wine consumption per capita

Finland is a top 50 country for per capita still wine consumption, although it is has seen a large year-on-year decline in this metric

Per capita consumption of still wine

Litres per annum (adult LDA+ population)

		2021	2022	CAGR 17-22	CAGR 21-22
1	St. Martin and St. Maarten	46.70	49.00	12.3%	5.0%
2	Portugal	43.00	45.70	-0.9%	6.3%
3	Montenegro	41.80	42.60	-0.9%	2.0%
4	Italy	42.20	39.90	-2.8%	-5.2%
5	Slovenia	37.60	37.80	-2.8%	0.5%
6	St. Barths	33.90	37.20	9.3%	9.8%
7	Switzerland	36.10	34.90	-1.6%	-3.3%
8	France	35.60	33.80	-5.3%	-5.0%
9	Greece	28.00	33.80	0.5%	20.9%
10	Hungary	31.50	32.70	0.6%	3.6%
11	Denmark	33.30	30.90	-1.3%	-7.2%
12	Austria	30.90	30.10	-1.3%	-2.6%
13	Turks and Caicos	27.60	30.10	-2.9%	9.2%
14	Romania	27.50	27.90	2.4%	1.2%
15	US Virgin Islands	27.80	27.80	-2.6%	0.3%
16	Germany	26.40	25.20	-2.5%	-4.8%
17	Argentina	25.30	24.90	-2.7%	-1.5%
18	Malta	21.20	24.30	-6.4%	14.9%
19	Uruguay	25.60	23.40	-1.3%	-8.6%
20	Slovakia	22.90	23.40	-0.1%	1.9%
48	Finland	11.80	11.00	-0.8%	-6.4%

Source: IWSR

Sparkling wine volumes by origin

Though smaller than still wine, sparkling is seeing sustained growth; the Old World is in favour, especially Italy and France

Total sparkling wine volumes and market share by origin

000s 9-litre cases

		2021	2022	CAGR 17-22	CAGR F 22-27	Market Share
	Total	**850.27**	**816.74**	1.4%	0.7%	
1	Italian	**260.95**	**253.10**	7.3%	0.9%	**31%**
2	Spanish	**229.25**	**212.54**	-4.0%	0.5%	**26%**
3	French	**209.19**	**206.90**	5.6%	1.3%	**25%**
4	German	**39.59**	**40.00**	2.4%	0.4%	**5%**
5	Chilean	**34.35**	**33.80**	-5.9%	-0.4%	**4%**
6	Belg / Lux	**22.00**	**21.50**	1.5%	-1.4%	**3%**
7	New Zealand	**22.45**	**18.50**	0.5%	-0.1%	**2%**
8	Hungarian	**12.95**	**11.09**	5.5%	-1.3%	**1%**
9	Australian	**9.90**	**10.10**	-17.1%	-0.3%	**1%**
10	South African	**4.05**	**4.09**	-16.8%	2.4%	**1%**

Source: IWSR

Sparkling wine retail price by origin

Sparkling wine has enjoyed an increase in its average price per 75cl bottle, although this is forecast to flatline

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a variable exchange rate

		Retail price per 0.75l 2022 (US$)	CAGR 17-22	CAGR F 22-27
	Total	14.64	1.4%	0.1%
1	Italian	12.96	1.6%	0.0%
2	Spanish	11.99	2.3%	0.2%
3	French	22.27	-0.4%	-0.1%
4	German	9.25	-1.5%	-0.1%
5	Chilean	9.43	-2.0%	-0.1%
6	Belg / Lux	16.31	2.5%	0.0%
7	New Zealand	8.43	-11.4%	0.0%
8	Hungarian	9.65	0.6%	0.0%
9	Australian	10.19	-1.4%	-0.2%
10	South African	14.28	3.8%	0.4%

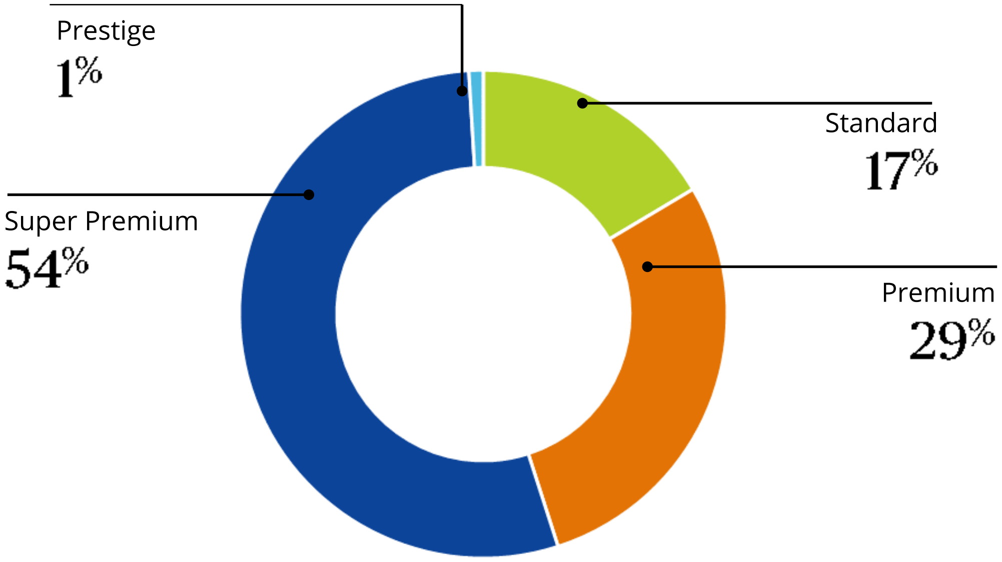
Source: IWSR

Champagne by price band

Over half of Champagne purchases in Finland are in super-premium, at a minimum €45; volumes are seeing growth in every price band, reflecting interest in the sparkling wine market as a whole

Champagne by price brand

% of purchases that fall within the categories below



Champagne volumes by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Standard (under €30.00)	**14.00**	**10.00**	**0.0%**	**8.4%**
Premium (€30.00 to €44.99)	**15.50**	**17.38**	**1.1%**	**1.8%**
Super Premium (€45.00 to €124.99)	**32.77**	**32.82**	**0.5%**	**0.0%**
Prestige (€125.00 and over)	**0.58**	**0.58**	**3.0%**	**0.7%**

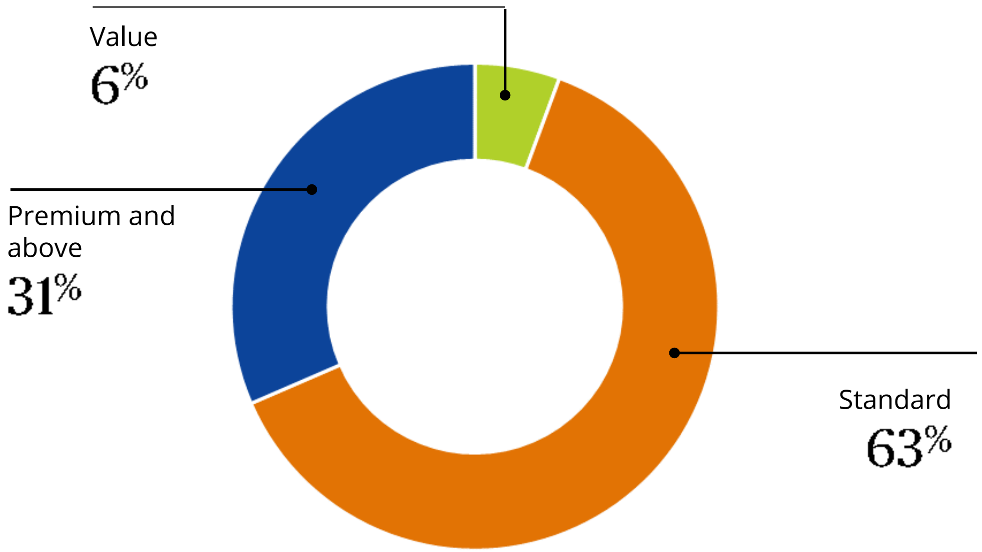
Source: IWSR

Other sparkling wine by price band

Most non-Champagne sparkling wine is sold above €7, although a sizeable increase has been seen below that price point

Sparkling wine by price brand

% of purchases that fall within the categories below



Sparkling wine volumes by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Value (under €7.00)	31.30	42.60	25.1%	1.2%
Standard (between €7.00 and €14.99)	510.30	475.20	0.5%	0.2%
Premium (over €15.00)	245.90	238.10	1.2%	1.3%

Source: IWSR

Sparkling wine consumption per capita

Finland experienced a small increase in its per capita sparkling wine consumption between 2017 and 2022, although it declined sharply in 2021–2022

Per capita consumption of sparkling wine

Litres per annum (LDA+ adults)

		2021	2022	CAGR 17-22	CAGR 21-22
1	St. Barths	12.50	13.60	13.1%	8.9%
2	St. Martin and St. Maarten	6.30	8.30	21.7%	32.6%
3	Italy	7.90	7.40	-1.2%	-6.2%
4	Turks and Caicos	5.30	6.50	-2.4%	23.4%
5	Germany	5.30	5.50	-1.9%	3.7%
6	Lithuania	4.90	5.10	7.3%	3.6%
7=	Latvia	4.50	4.90	2.6%	9.4%
7=	France	4.70	4.90	-1.3%	2.7%
9	Guadeloupe	4.20	4.80	-1.8%	15.5%
10	Martinique	4.20	4.40	-4.6%	4.8%
11=	Estonia	4.10	4.30	4.0%	6.3%
11=	Belgium and Luxembourg	4.30	4.30	-1.5%	-0.2%
13	Austria	3.40	3.50	0.3%	2.9%
14=	Switzerland	3.20	3.30	0.9%	3.0%
14=	Cayman Islands	3.10	3.30	2.1%	5.8%
14=	Sweden	3.30	3.30	6.7%	0.6%
17=	United Kingdom	3.20	3.00	-0.6%	-4.8%
17=	Slovenia	2.90	3.00	3.0%	4.1%
19=	New Zealand	3.10	2.90	-1.6%	-6.1%
19=	Reunion	2.60	2.90	0.7%	14.7%
36	Finland	1.70	1.60	1.1%	-4.2%

Source: IWSR

Market Demographics

Finland Wine Landscapes

2023

Finnish regular wine drinkers

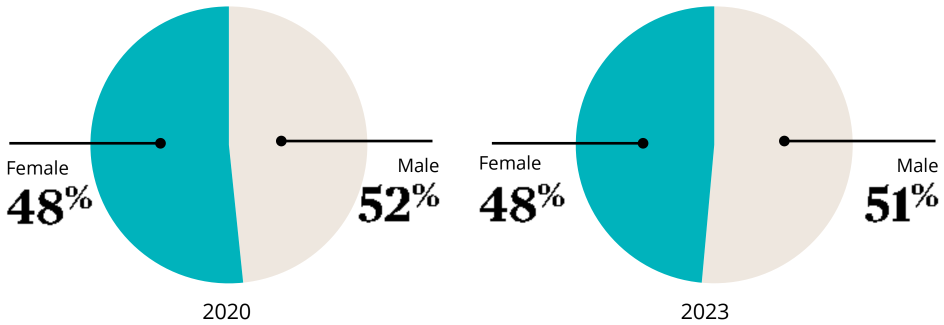
The wine drinking population has decreased since 2017 and there are now 200,000 fewer monthly and weekly wine drinkers

1 Statistics Finland, Population projection 2015 by Sex and Age
2 Statistics Finland, Population as of 31st December 2022 by Sex and Age
3 Wine Intelligence online calibration study, Feb 2017 & March 2023 (n>1,007) Finnish adults. Wine=still light wine (red, white, rosé)
4 Wine Intelligence, Vinitrac® Finland Oct '17, Feb' 23 (n>1,000) Finnish regular wine drinkers

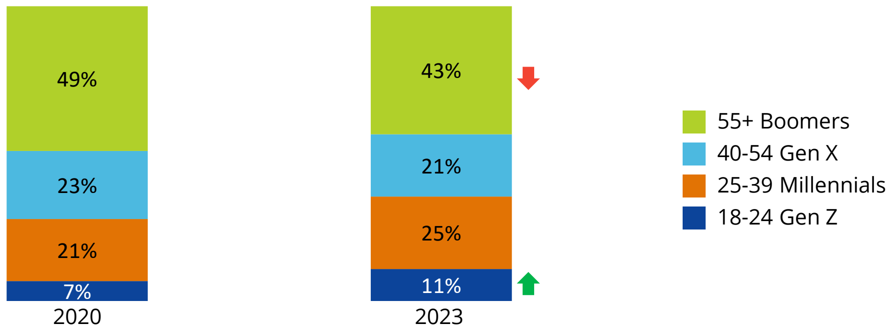
Demographics of regular wine drinkers

Significantly greater numbers of Finnish regular wine drinkers are Gen Z, but there are considerably fewer Boomers than in previous years; there has been an increase in low-income wine drinkers

Gender



Generation cohorts



Regions

	2020	2023	Tracking
Southern Finland	**47%**	**46%**	→
South-Western Finland	**13%**	**15%**	→
Eastern Finland	**9%**	**10%**	→
Western and Central Finland	**21%**	**22%**	→
Northern Finland	**9%**	**7%**	→
Ahvenanmaa-Åland	**0%**	**0%**	→

Annual household income before taxes

	2020	2023	Tracking
Less than €19,999	**12%**	**16%**	↑
€20,000 - €29,999	**14%**	**14%**	→
€30,000 - €39,999	**14%**	**12%**	→
€40,000 - €59,999	**22%**	**23%**	→
More than €60,000	**26%**	**27%**	→
Prefer not to answer	**13%**	**9%**	↓

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Feb '23, (n≥1,002) Finnish regular wine drinkers

Drinking Repertoire

Finland Wine Landscapes

2023

Drinking repertoire

Alcohol beverage repertoires have remained broadly stable for the biggest categories since 2020. There has been an increase in those consuming RTDs and a decline for red wine

Market context:

Spirits and wine experienced significant declines in volume and value after the reopening of horeca and the escalation of border trade and travel retail. In the monopoly, white wine volumes surpassed those of red in 2022

Executive Summary Report 2023 Finland

Alcoholic beverage repertoire: Tracking

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

Ranking '23		2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
1	White wine	**85%**	**87%**	**86%**	→	→
2	Red wine	**89%**	**85%**	**84%**	↓	→
3	Beer	**78%**	**78%**	**79%**	→	→
4	Cider	**58%**	**56%**	**54%**	→	→
5	Vodka	**48%**	**48%**	**49%**	→	→
6	Rosé wine	**36%**	**40%**	**38%**	→	→
7	Craft beer	**39%**	**39%**	**37%**	→	→
8	Liqueurs	**37%**	**37%**	**35%**	→	→
9	Whisky / Whiskey	**39%**	**37%**	**34%**	↓	→
10=	Brandy / Cognac	**40%**	**40%**	**33%**	↓	↓
10=	Other sparkling wine	**45%**	**39%**	**33%**	↓	↓
10=	Prosecco	**35%**	**33%**	**33%**	→	→
10=	Champagne (French Champagne)	**38%**	**33%**	**33%**	↓	→
14	Pre-mixed / ready to drink alcoholic beverages	**28%**	**29%**	**32%**	↑	→
15	Gin	**36%**	**33%**	**31%**	↓	→
16	Rum	**32%**	**31%**	**29%**	→	→
17	Cocktails	**27%**	**21%**	**27%**	→	↑
18	Cava	**32%**	**28%**	**26%**	↓	→
19	Sweet / dessert wine	**19%**	**17%**	**17%**	→	→
20	Port	**12%**	**11%**	**10%**	→	→

=Represents equal ranking

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

Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

Varietal consumption

There have been significant declines in some popular varietals since 2020, especially in reds

White varietal consumption: Tracking

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

Ranking '23		2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
1	Riesling	53%	54%	51%	→	→
2	Chardonnay	53%	52%	46%	↓	↓
3	Sauvignon Blanc	50%	48%	43%	↓	↓
4	Pinot Grigio / Pinot Gris	29%	29%	27%	→	→
5	Chenin Blanc	13%	15%	14%	→	→
6	Moscato	9%	11%	10%	→	→
7=	Gewürztraminer	9%	9%	9%	→	→
7=	Torrontés	8%	11%	9%	→	→
9	Grüner Veltliner	7%	8%	8%	→	→
10=	Sémillon	3%	4%	5%	↑	→
10=	Verdejo	4%	6%	5%	→	→
10=	Viognier	3%	5%	5%	→	→
13	Colombard	3%	3%	4%	↑	→
14	Albariño	3%	3%	3%	→	→

Red varietal consumption: Tracking

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

Ranking '23		2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
1=	Cabernet Sauvignon	52%	48%	42%	↓	↓
1=	Merlot	50%	47%	42%	↓	↓
3	Pinot Noir	46%	44%	41%	↓	→
4	Shiraz / Syrah	47%	42%	34%	↓	↓
5	Tempranillo	22%	23%	21%	→	→
6	Malbec	24%	22%	19%	↓	→
7	Pinotage	13%	14%	12%	→	→
8	Sangiovese	9%	10%	11%	→	→
9	Carménère	10%	10%	10%	→	→
10	Zinfandel	9%	10%	8%	→	→
11	Grenache	4%	5%	7%	↑	→
12	Gamay	2%	2%	4%	↑	↑

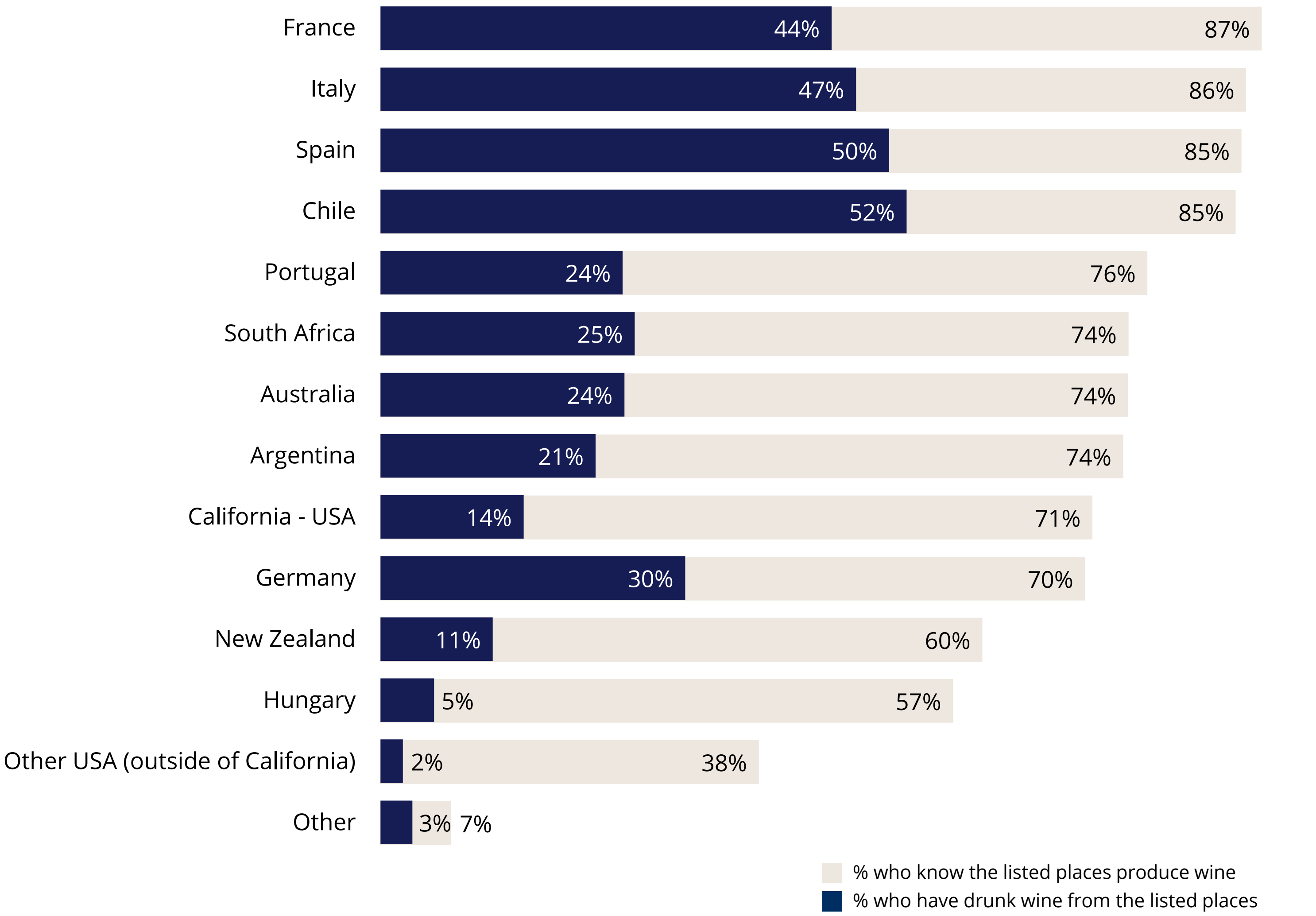
= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

Country of origin consumption and awareness

There is lower consumption of wine from many New World countries relative to awareness levels, with higher conversion rates for European origins and Chile

Country of origin: Top 15 awareness and consumption levels

% of those who know of or have drunk wine from the following places in the past six months
Base = All Finnish regular wine drinkers (n=1,014)



Source: Wine Intelligence, Vinitrac®, Finland, Feb '23, (n=1,014) Finnish regular wine drinkers

Country of origin awareness

There has been a significant decline in country awareness since both 2020 and 2021

Country of origin awareness: Tracking

% of those who know the following places produce wine
Base = All Finnish regular wine drinkers (n≥1,000)

Ranking '23		2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
1	France	93%	91%	87%	↓	↓
2	Italy	91%	88%	86%	↓	→
3=	Spain	92%	91%	85%	↓	↓
3=	Chile	93%	90%	85%	↓	↓
5	Portugal	82%	80%	76%	↓	→
6=	South Africa	85%	83%	74%	↓	↓
6=	Australia	85%	83%	74%	↓	↓
6=	Argentina	83%	84%	74%	↓	↓
9	California - USA	79%	78%	71%	↓	↓
10	Germany	80%	77%	70%	↓	↓
11	New Zealand	69%	69%	60%	↓	↓
12	Hungary	70%	66%	57%	↓	↓
13	Other USA (outside of California)	48%	46%	38%	↓	↓

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

Country of origin consumption

Consumption of wine from many leading countries of origin has declined since 2020 and 2021. Italy, France and Germany are notable exceptions that have remained more stable

Country of origin consumption: Tracking

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

Ranking '23		2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
1	Chile	**64%**	**60%**	**52%**	↓	↓
2	Spain	**57%**	**52%**	**50%**	↓	→
3	Italy	**50%**	**46%**	**47%**	→	→
4	France	**44%**	**44%**	**44%**	→	→
5	Germany	**33%**	**33%**	**30%**	→	→
6	South Africa	**35%**	**30%**	**25%**	↓	↓
7=	Australia	**32%**	**28%**	**24%**	↓	↓
7=	Portugal	**25%**	**24%**	**24%**	→	→
9	Argentina	**26%**	**24%**	**21%**	↓	→
10	California - USA	**16%**	**18%**	**14%**	→	↓
11	New Zealand	**14%**	**13%**	**11%**	↓	→
12	Hungary	**8%**	**8%**	**5%**	↓	↓
13	Other USA (outside of California)	**3%**	**4%**	**2%**	→	↓

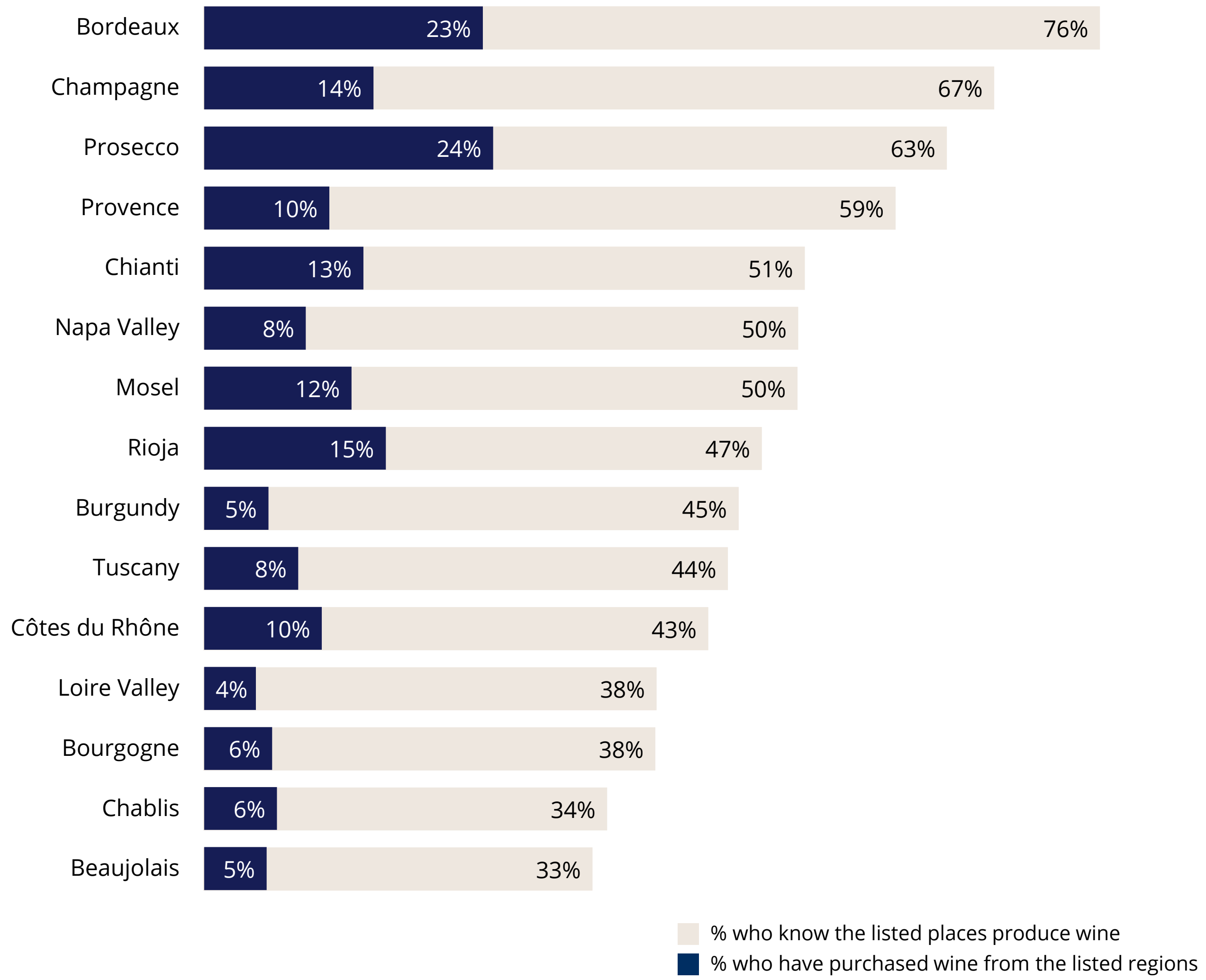
= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

Region of origin consumption and awareness

Region of origin awareness is topped by prominent French and Italian regions, with consumption highest for Bordeaux and Prosecco

Region of origin: Top 15 awareness and consumption levels

% of those who know of or have purchased wine from the following wine-producing regions in the past 3 months
Base = All Finnish regular wine drinkers (n=1,014)



Source: Wine Intelligence, Vinitrac®, Finland, Feb ‘23, (n=1,014) Finnish regular wine drinkers

Region of origin awareness

Most regions of origin have experienced significant declines in awareness since 2020 and 2021

Region of origin awareness: Top 15, tracking

% of those who know the following regions produce wine
Base = All Finnish regular wine drinkers (n≥1,000)

Ranking '23		2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking	
					vs. '20	vs. '21
1	Bordeaux	83%	79%	76%	↓	→
2	Champagne	73%	69%	67%	↓	→
3	Prosecco	61%	62%	63%	→	→
4	Provence	65%	64%	59%	↓	↓
5	Chianti	59%	56%	51%	↓	↓
6=	Napa Valley	56%	58%	50%	↓	↓
6=	Mosel	61%	60%	50%	↓	↓
8	Rioja	58%	53%	47%	↓	↓
9	Burgundy	52%	50%	45%	↓	↓
10	Tuscany	48%	47%	44%	→	→
11	Côtes du Rhône	54%	49%	43%	↓	↓
12=	Loire Valley	43%	42%	38%	→	→
12=	Bourgogne	46%	45%	38%	↓	↓
14	Chablis	41%	39%	34%	↓	↓
15	Beaujolais	43%	41%	33%	↓	↓

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

Region of origin consumption

Despite significant declines in region of origin awareness, consumption has remained broadly stable for nearly all regions tracked

Region of origin consumption: Top 15, tracking

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

Ranking '23		2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
1	Prosecco	21%	25%	24%	→	→
2	Bordeaux	22%	23%	23%	→	→
3	Rioja	19%	19%	15%	↓	↓
4	Champagne	13%	12%	14%	→	→
5	Chianti	15%	14%	13%	→	→
6	Mosel	16%	17%	12%	↓	↓
7=	Provence	10%	12%	10%	→	→
7=	Côtes du Rhône	11%	12%	10%	→	→
9=	Napa Valley	10%	10%	8%	→	→
9=	Tuscany	6%	9%	8%	→	→
9=	Alsace	9%	11%	8%	→	↓
12=	Sicily	6%	7%	6%	→	→
12=	Chablis	7%	9%	6%	→	↓
12=	Bourgogne	6%	6%	6%	→	→
15=	Burgundy	5%	7%	5%	→	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan ’20, Jan ’21, Feb ’23, (n≥1,000) Finnish regular wine drinkers

Wine-Buying Behaviours

Finland Wine Landscapes

2023

Wine-buying channel usage

Travel-related retail has recovered following pandemic lows. These channels are popular due to the high price of alcohol in the domestic market

Wine-buying channel usage: Tracking

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

Ranking '23		2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
1	From an Alko shop	**87%**	**92%**	**88%**	→	↓
2	From a ferry / cruise	**31%**	**14%**	**26%**	↓	↑
3	In person from a retailer in Estonia	**19%**	**8%**	**13%**	↓	↑
4=	From Duty Free (eg airports)	**14%**	**6%**	**10%**	↓	↑
4=	In person from another overseas retailer	**13%**	**5%**	**10%**	↓	↑
6	'From Alko online (click and collect)	**n/a**	**11%**	**9%**	n/a	→
7	Online from an overseas retailer	**n/a**	**8%**	**8%**	n/a	→
8	From a winery during a visit	**n/a**	**3%**	**6%**	n/a	↑
9	From a delivery app	**n/a**	**3%**	**4%**	n/a	→

17% are online wine buyers vs **18%** in 2021

Market context:

Consumers are expected to visit border and travel retail shops more, but rising travel costs and Alko's shift towards lower-priced products may reduce the appeal of shopping for alcohol at the border.

Executive Summary Report 2023 Finland

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

Consumption frequency

Fewer wine drinkers consume wine more than once a week than in 2021; this trend is similar across age groups

Wine consumption frequency: Tracking

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

	2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
Most days / every day	**2%**	**2%**	**2%**	→	→
2-5 times a week	**16%**	**18%**	**14%**	→	↓
About once a week	**30%**	**29%**	**27%**	→	→
1-3 times a month	**52%**	**51%**	**56%**	→	↑

Wine consumption frequency: by generation

% who usually drink wine at the following frequency
Base = All Finnish regular wine drinkers (n=1,014)

	All Finnish regular wine drinkers (n=1,014)	18-24 Gen Z (n=110)	25-39 Millennials (n=249)	40-54 Gen X (n=214)	55+ Boomers (n=441)
Most days / every day	**2%**	**1%**	**2%**	**1%**	**3%**
2-5 times a week	**14%**	**14%**	**12%**	**19%**	**13%**
About once a week	**27%**	**26%**	**25%**	**31%**	**28%**
1-3 times a month	**56%**	**60%**	**60%**	**49%**	**56%**

% / %: 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®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

Off-trade consumption frequency

Significantly more Finnish consumers are drinking wine for celebrations at home than in 2020 and 2021, which may be a lingering impact on drinking habits from the pandemic

Off-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the off-trade

	2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
A relaxing drink at the end of the day at home	**3.07**	**3.24**	**3.01**	➡	➡
With an informal meal at home	**2.12**	**2.30**	**2.28**	➡	➡
With a more formal dinner party at home	**1.53**	**1.73**	**1.69**	➡	➡
At a party / celebration at home	**1.01**	**1.01**	**1.22**	⬆	⬆

Note: Table above shows the number of days per month that consumers are drinking wine at these occasions

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

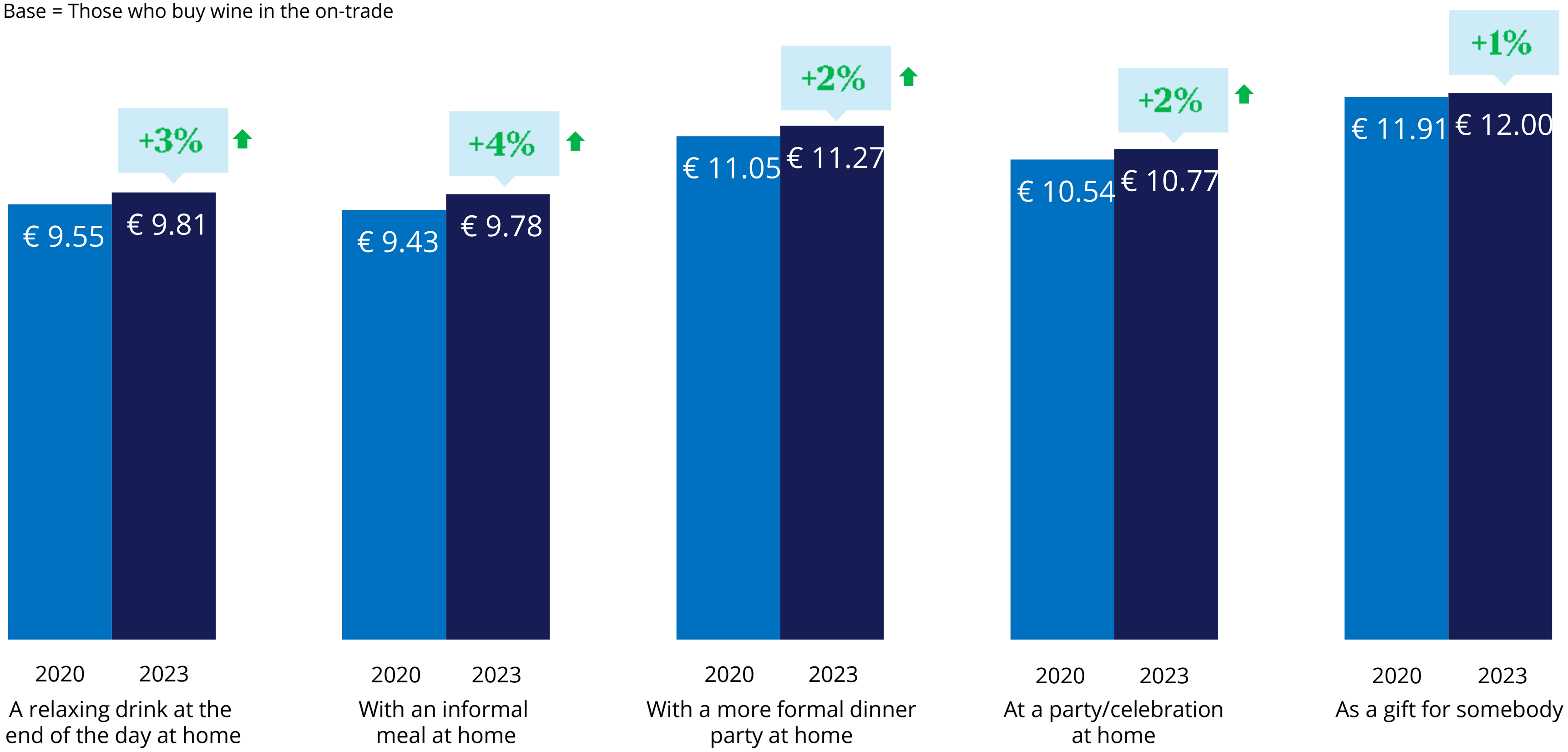
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

Average off-trade spend

Spend has increased significantly for at-home occasions in Finland since 2020, apart from wine bought as a gift

Off-trade: Average spend per bottle by occasion

Base = Those who buy wine in the on-trade



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

Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Feb '23, (n≥1,002) Finnish regular wine drinkers

On-trade consumption

On-trade wine purchase locations have remained broadly the same since 2020. Higher than average proportions of Millennials are on-trade drinkers

Wine purchase in on-trade

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

On-trade location		2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
Bar or pub	Yes	51%	47%	45%	↓	→
	No	49%	53%	55%	↑	→
Restaurant	Yes	87%	86%	85%	→	→
	No	13%	14%	15%	→	→
On-trade drinkers	Yes	88%	87%	86%	→	→
	No	12%	13%	14%	→	→

Wine purchase in on-trade: by generation

% who buy wine in a bar, pub or restaurant
Base = All Finnish regular wine drinkers (n=1,014)

On-trade location		All Finnish regular wine drinkers (n=1,014)	18-24 Gen Z (n=110)	25-39 Millennials (n=249)	40-54 Gen X (n=214)	55+ Boomers (n=441)
Bar or pub	Yes	45%	46%	57%	40%	40%
	No	55%	54%	43%	60%	60%
Restaurant	Yes	85%	90%	88%	82%	84%
	No	15%	10%	12%	18%	16%
On-trade drinkers	Yes	86%	92%	91%	82%	84%
	No	14%	8%	9%	18%	16%

% / %: 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®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

On-trade consumption frequency

Consumption frequency has increased significantly for on-trade occasions since 2020, suggesting a post-pandemic boost

On-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the on-trade

	2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
A relaxing drink out at the end of the day	**1.1**	**1.2**	**1.5**	⬆	⬆
With an informal meal in a pub / bar / restaurant	**0.9**	**1.0**	**1.2**	⬆	⬆
With a more formal dinner in a restaurant	**0.9**	**1.0**	**1.3**	⬆	⬆
At a party / celebration / big night out	**1.0**	**1.1**	**1.4**	⬆	⬆

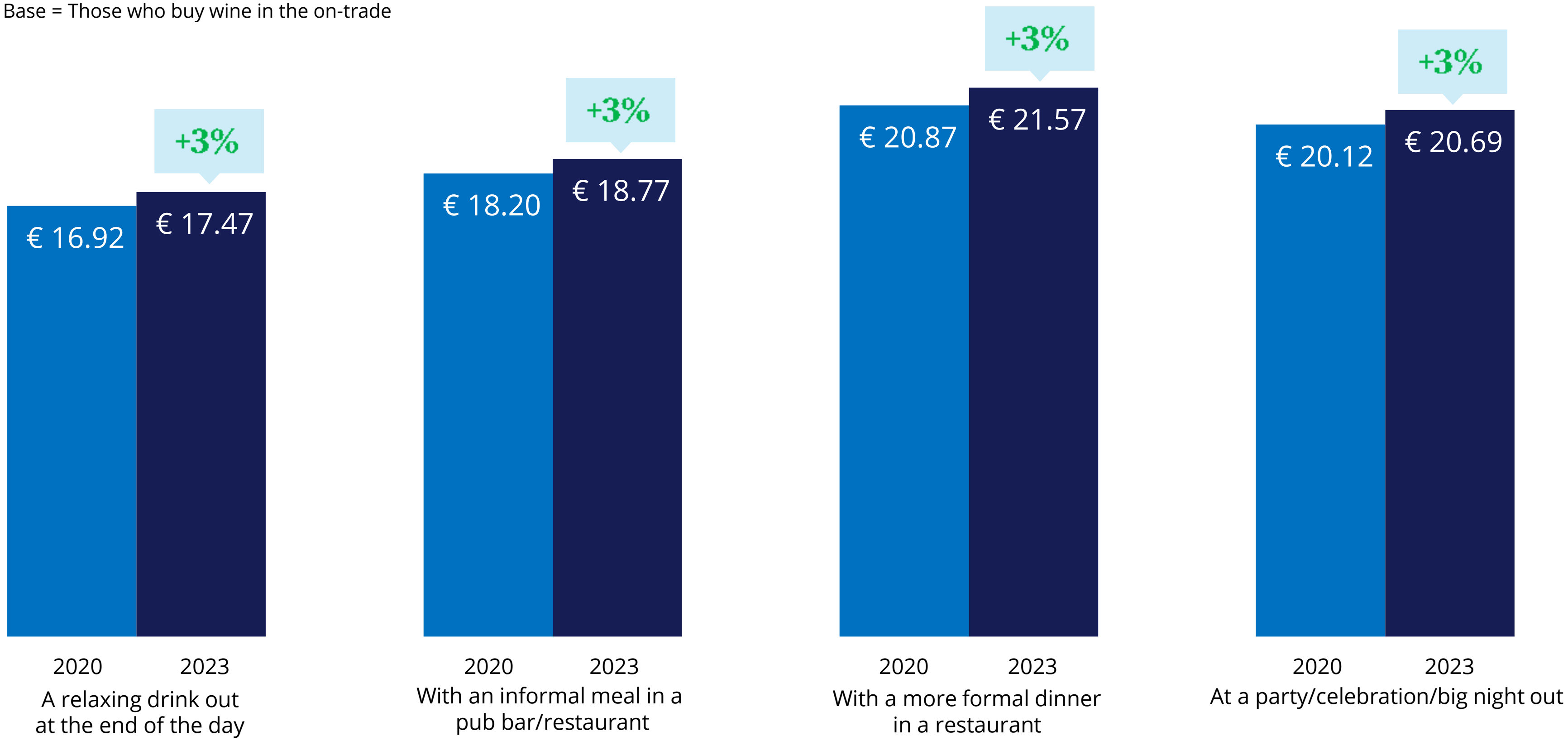
Note: Table above shows the number of days per month that consumers are drinking wine at these occasions

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

Typical on-trade spend

On-trade consumption occasions have increased significantly but this has not translated into significantly higher spends in 2023

On-trade: Typical spend per occasion
Base = Those who buy wine in the on-trade



⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Feb '23, (n≥1,002) Finnish regular wine drinkers

Wine Views and Attitudes

Finland Wine Landscapes

2023

Attitudes towards wine

Price-consciousness has increased significantly since 2020, led by Gen Z consumers

Attitudes towards wine: Tracking

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

	2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
I enjoy trying new and different styles of wine on a regular basis	**47%**	**48%**	**44%**	➡	➡
I don't mind what I buy so long as the price is right	**15%**	**16%**	**19%**	⬆	⬆
I know what I like and I tend to stick to what I know	**38%**	**37%**	**37%**	➡	➡

Attitudes towards wine by generation

% who 'agree' or 'strongly agree' with the following statements
Base = All Finnish regular wine drinkers (n=1,014)

	All Finnish regular wine drinkers (n=1,014)	18-24 Gen Z (n=110)	25-39 Millennials (n=249)	40-54 Gen X (n=214)	55+ Boomers (n=441)
I enjoy trying new and different styles of wine on a regular basis	**44%**	**52%**	**54%**	**47%**	**35%**
I don't mind what I buy so long as the price is right	**19%**	**27%**	**21%**	**20%**	**16%**
I know what I like and I tend to stick to what I know	**37%**	**20%**	**25%**	**33%**	**50%**

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

Wine involvement

Involvement has remained broadly stable in Finland since 2020; this metric is similar across age groups

Wine involvement: Tracking

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

	2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
High involvement	**23%**	**29%**	**26%**	→	→
Medium involvement	**30%**	**30%**	**34%**	→	↑
Low involvement	**46%**	**42%**	**40%**	↓	→

Wine involvement by generation

Base = All Finnish regular wine drinkers (n=1,014)

	All Finnish regular wine drinkers (n=1,014)	18-24 Gen Z (n=110)	25-39 Millennials (n=249)	40-54 Gen X (n=214)	55+ Boomers (n=441)
High involvement	**26%**	**27%**	**28%**	**29%**	**23%**
Medium involvement	**34%**	**33%**	**36%**	**30%**	**35%**
Low involvement	**40%**	**40%**	**37%**	**41%**	**42%**

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

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level

Source: Wine Intelligence, Vinitrac®, Finland, Jan ’20, Jan ’21, Feb ‘23, (n≥1,000) Finnish regular wine drinkers

Involvement and perceived expertise (1/2)

Fewer people than in 2021 drink wine for pleasure, consider buying it to be an important decision, or have a strong interest in wine

Involvement and perceived expertise in wine: Tracking

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

Ranking '23		2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
1	Drinking wine gives me pleasure	88%	92%	86%	→	↓
2	I like to take my time when I purchase a bottle of wine	80%	82%	81%	→	→
3	I always look for the best quality wines I can get for my budget	72%	72%	69%	→	→
4	Deciding which wine to buy is an important decision	64%	68%	64%	→	↓
5	Generally speaking, wine is reasonably priced	60%	61%	59%	→	→
6	I don't understand much about wine	44%	45%	51%	↑	↑
7	I have a strong interest in wine	46%	49%	44%	→	↓
8	Generally speaking, wine is an expensive drink	33%	38%	37%	↑	→
9	Compared to others, I know less about the subject of wine	31%	33%	36%	↑	→
10	Wine is important to me in my lifestyle	23%	28%	32%	↑	→
11	I feel competent about my knowledge of wine	28%	29%	27%	→	→

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

Involvement and perceived expertise (2/2)

A lower proportion of Gen Z say that they drink wine for pleasure compared with all Finnish regular wine drinkers

Involvement and perceived expertise in wine by generation

% who 'agree' or 'strongly agree' with the following statements
Base = All Finnish regular wine drinkers (n=1,014)

Ranking '23		All Finnish regular wine drinkers (n=1,014)	18-24 Gen Z (n=110)	25-39 Millennials (n=249)	40-54 Gen X (n=214)	55+ Boomers (n=441)
1	Drinking wine gives me pleasure	86%	76%	89%	88%	85%
2	I like to take my time when I purchase a bottle of wine	81%	78%	84%	78%	81%
3	I always look for the best quality wines I can get for my budget	69%	78%	69%	70%	67%
4	Deciding which wine to buy is an important decision	64%	69%	60%	63%	64%
5	Generally speaking, wine is reasonably priced	59%	68%	61%	58%	56%
6	I don't understand much about wine	51%	54%	53%	52%	49%
7	I have a strong interest in wine	44%	47%	45%	44%	42%
8	Generally speaking, wine is an expensive drink	37%	41%	39%	33%	36%
9	Compared to others, I know less about the subject of wine	36%	42%	40%	35%	33%
10	Wine is important to me in my lifestyle	32%	35%	34%	31%	31%
11	I feel competent about my knowledge of wine	27%	28%	32%	26%	24%

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Feb '23, (n=1,014) Finnish regular wine drinkers

Wine knowledge and confidence

Wine knowledge and confidence have both declined significantly in Finland compared with 2020 and 2021

Wine knowledge index: Tracking

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

	2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
Knowledge Index	**46.7**	**45.3**	**40.8**	⬇	⬇

Wine knowledge index (0–100) is calculated based on consumer-reported awareness of wine-growing regions and wine brands.
*Wine knowledge index is the 'objective' measurement of consumer knowledge about wine.

-6.0 Index change

Wine confidence index: Tracking

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

	2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
Confidence Index	**47.0**	**46.8**	**44.6**	⬇	⬇

Wine confidence index (0–100) is calculated based on the extent to which consumers feel competent 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.
**Wine confidence index is the 'subjective' measurement of consumer confidence about their wine knowledge.

-2.4 Index change

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

Wine-drinking motivations

Gen Z and Millennials are driven by factors such as atmosphere, fashion and sophistication when drinking wine; the motivations for Boomers are more or less the opposite

Wine drinking motivations

% who selected the following as reasons why they drink wine
Base = All Finnish regular wine drinkers (n=1,014)

Ranking '23		All Finnish regular wine drinkers (n=1,014)	18-24 Gen Z (n=110)	25-39 Millennials (n=249)	40-54 Gen X (n=214)	55+ Boomers (n=441)
1	Wine enhances food and meals	68%	63%	63%	65%	73%
2	Drinking wine makes me feel relaxed	57%	57%	58%	60%	55%
3	To celebrate special occasions	52%	50%	50%	47%	57%
4	Wine is about sharing with a partner / close friend or family member	46%	42%	43%	42%	51%
5	Wine is about sharing something with others	45%	50%	44%	41%	46%
6	I really love the taste of wine	43%	45%	46%	46%	40%
7	Wine helps create a warm / friendly atmosphere	42%	52%	42%	41%	40%
8	I treat myself with wine at the end of the day	26%	30%	29%	26%	24%
9=	I like shopping / choosing wines to drink	23%	29%	31%	20%	19%
9=	I like learning about new wines	23%	31%	23%	23%	21%
11	Most of my friends drink wine	19%	26%	21%	11%	21%
12	Wine is a refreshing drink	15%	17%	17%	16%	14%
13	Wine is a fashionable drink	14%	39%	21%	10%	7%
14	Drinking wine can be good for my health	13%	5%	18%	14%	13%
15	It makes people sophisticated	10%	20%	16%	9%	4%
16	It makes me feel individual and unique	8%	20%	12%	6%	3%

= Represents equal ranking
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Feb '23, (n=1,014) Finnish regular wine drinkers

Wine-buying choice cues

There have been declines in many choice cues for Finnish consumers when buying wine; alcohol content and label design have increased in importance since 2020

Wine choice cues: Tracking

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

Ranking '23		2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
1	Taste or wine style descriptions displayed on the shelves or on wine labels	79%	80%	76%	→	↓
2	Wine that matches or compliments food	77%	78%	73%	↓	↓
3	A brand I am aware of	72%	70%	68%	↓	→
4	Recommendation by friend or family	65%	62%	60%	↓	→
5	The country of origin (eg France, Australia, Spain, Chile, USA, etc)	65%	61%	57%	↓	→
6	The wines recommended by shop staff	60%	60%	55%	↓	↓
7	Grape variety (eg Cabernet Sauvignon, Chardonnay, etc)	57%	56%	53%	→	→
8	The region of origin	51%	49%	46%	↓	→
9	Alcohol content	38%	43%	44%	↑	→
10	Appeal of the bottle and / or label design	32%	36%	38%	↑	→
11	Recommendation by wine guide books	34%	37%	34%	→	→
12	Recommendation by wine critic or writer	28%	28%	30%	→	→
13	Whether or not the wine has won a medal or award	26%	28%	27%	→	→

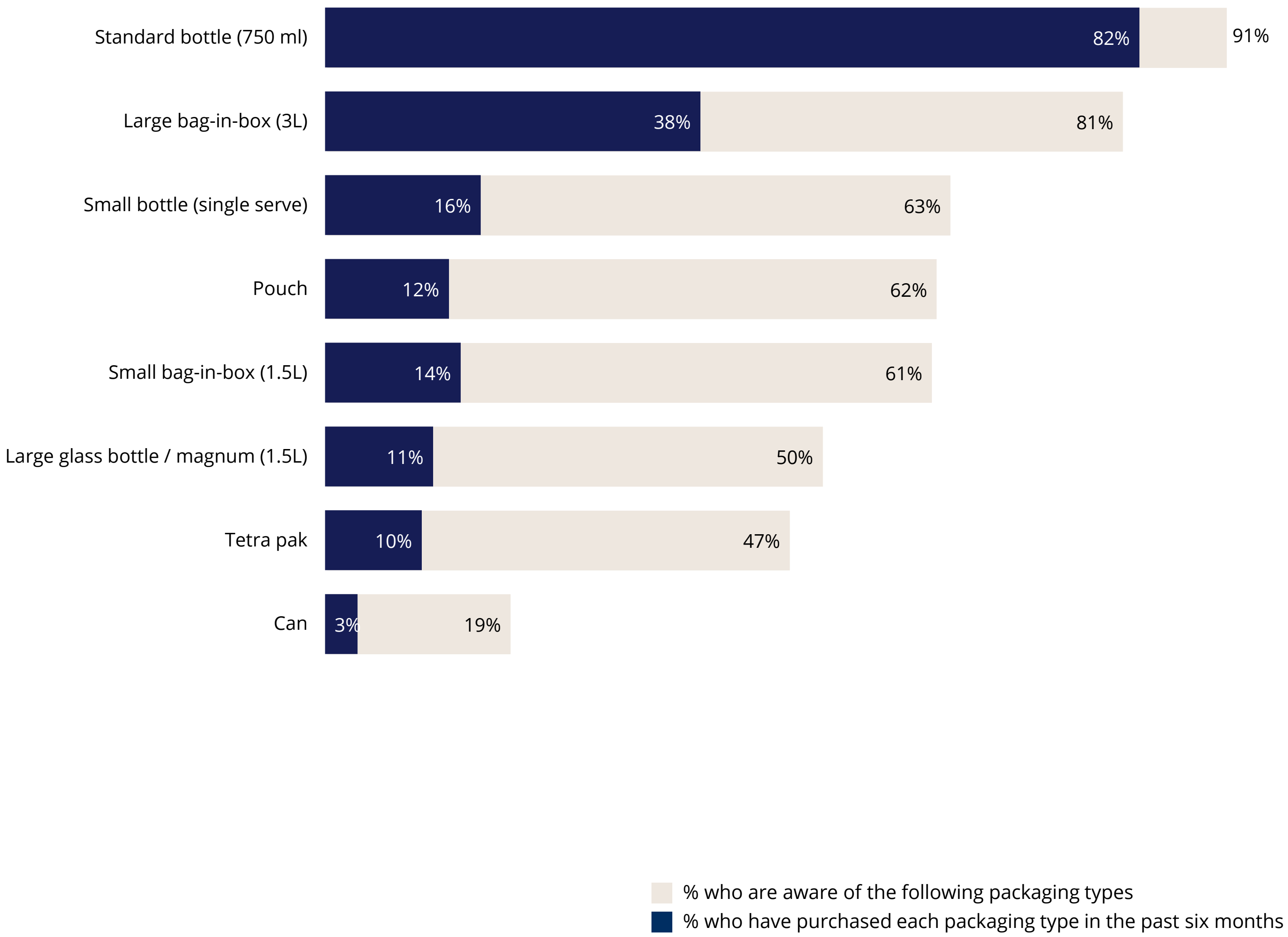
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

Packaging type consumption and awareness

There is broad awareness of alternative packaging types in Finland, but low consumption outside of standard bottles and 3-litre bag-in-box

Packaging types: Awareness and consumption levels

% of those who are aware of or have purchased wine in the following packaging types
Base = All Finnish regular wine drinkers (n=1,014)



Source: Wine Intelligence, Vinitrac®, Finland, Feb '23, (n=1,014) Finnish regular wine drinkers

Packaging purchase

There have been significant increases in purchases of alternative formats such as small bottles, pouches and 1.5-litre bottles since 2021, driven by Gen Z and Millennials, but rates remain low

Market context:

Environmentally friendly packaging such as Tetra Pak and lightweight glass bottles gained popularity. However, there were challenges from raw material shortages and convincing conservative customers to accept premium wines in such packaging formats. Canned wine became popular among younger LDA consumers and at festivals.

Executive Summary Report 2023 Finland

Packaging purchase: Tracking

% who have purchased wine in the following packaging types
Base = All Finnish regular wine drinkers (n≥1,000)

Ranking '23		2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '21
1	Standard bottle (750 ml)	**82%**	**82%**	→
2	Large bag-in-box (3L)	**41%**	**38%**	→
3	Small bottle (single serve)	**8%**	**16%**	↑
4	Small bag-in-box (1.5L)	**12%**	**14%**	→
5	Pouch	**8%**	**12%**	↑
6	Large glass bottle / magnum (1.5L)	**4%**	**11%**	↑
7	Tetra pak	**13%**	**10%**	↓
8	Can	**3%**	**3%**	→

Packaging purchase: by generation

% who have purchased wine in the following packaging types
Base = All Finnish regular wine drinkers (n=1,014)

Ranking '23		All Finnish regular wine drinkers (n=1,014)	18-24 Gen Z (n=110)	25-39 Millennials (n=249)	40-54 Gen X (n=214)	55+ Boomers (n=441)
1	Standard bottle (750 ml)	**82%**	**83%**	**85%**	**87%**	**78%**
2	Large bag-in-box (3L)	**38%**	**32%**	**33%**	**42%**	**40%**
3	Small bottle (single serve)	**16%**	**19%**	**23%**	**14%**	**12%**
4	Small bag-in-box (1.5L)	**14%**	**23%**	**15%**	**12%**	**11%**
5	Pouch	**12%**	**17%**	**12%**	**13%**	**11%**
6	Large glass bottle / magnum (1.5L)	**11%**	**30%**	**16%**	**6%**	**6%**
7	Tetra pak	**10%**	**2%**	**6%**	**14%**	**12%**
8	Can	**3%**	**8%**	**4%**	**1%**	**3%**

% / %: 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®, Finland, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

Brand Health

Finland Wine Landscapes

2023

Global Wine Brand Power Index

Brand health measures included in the 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**
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	

Wine Brand Power Index

Finland Brand Power Index

Gato Negro holds on to its top spot. JP Chenet remains in second place with Casillero del Diablo in third

GatoNegro — 1st

J.P. CHENET — 2nd

Casillero del Diablo — 3rd

Finland Brand Power Index 2023

There have been score increases for most brands in the Finnish market since 2022; some Chilean brands have struggled to maintain their rankings

Finland Brand Power Index 2023

The top 30 most powerful wine brands in the Finnish market based on consumer feedback from six key brand health measures
Base = All Finnish regular wine drinkers (n≥1,000)

Ranking '23		Final Index	Tracking vs 2022	Score difference vs 2022
1	Gato Negro	93.4	=	10.2
2	J.P. Chenet	89.8	=	9.6
3	Casillero del Diablo	76.8	↑+1	10.0
4	Black Tower	74.9	↑+1	13.8
5	Torres	68.9	↑+1	8.7
6	2u Duas Uvas	68.8	↓-3	1.4
7	Chill Out	62.8	=	4.5
8	Cono Sur	58.7	↑+3	6.1
9	El Tiempo	58.7	↑+1	5.9
10	Espíritu de Chile	58.2	↑+3	6.4
11	Yellow Tail	57.4	↑+1	5.3
12	Blue Nun	55.6	↓-4	0.5
13	Two Oceans	55.3	↑+2	5.2
14	Santa Helena	54.5	↓-5	1.3
15	Viña Maipo	53.8	↑+1	4.5

Ranking '23		Final Index	Tracking vs 2022	Score difference vs 2022
16	Tarapacá	53.6	↓-2	3.2
17	Lindeman's	51.5	↑+1	4.1
18	Jacob's Creek	51.2	↓-1	3.3
19	Pearly Bay	50.3	=	4.4
20	Kumala	50.0	=	5.4
21	Montalto	48.9	=	9.0
22	Footmark	45.3	=	5.9
23	Campo Viejo	43.4	↑+2	5.7
24	Viña Albali	42.9	↓-1	4.8
25	Nederburg	42.6	↑+7	8.7
26	Magyar Fehér Bor	41.6	↑+1	5.2
27	Raimat	41.0	↑+7	4.4
28	Hardys	40.4	↑+1	4.5
29	Luna Negra	39.6	↓-1	3.6
30	Masi	39.3	=	4.4

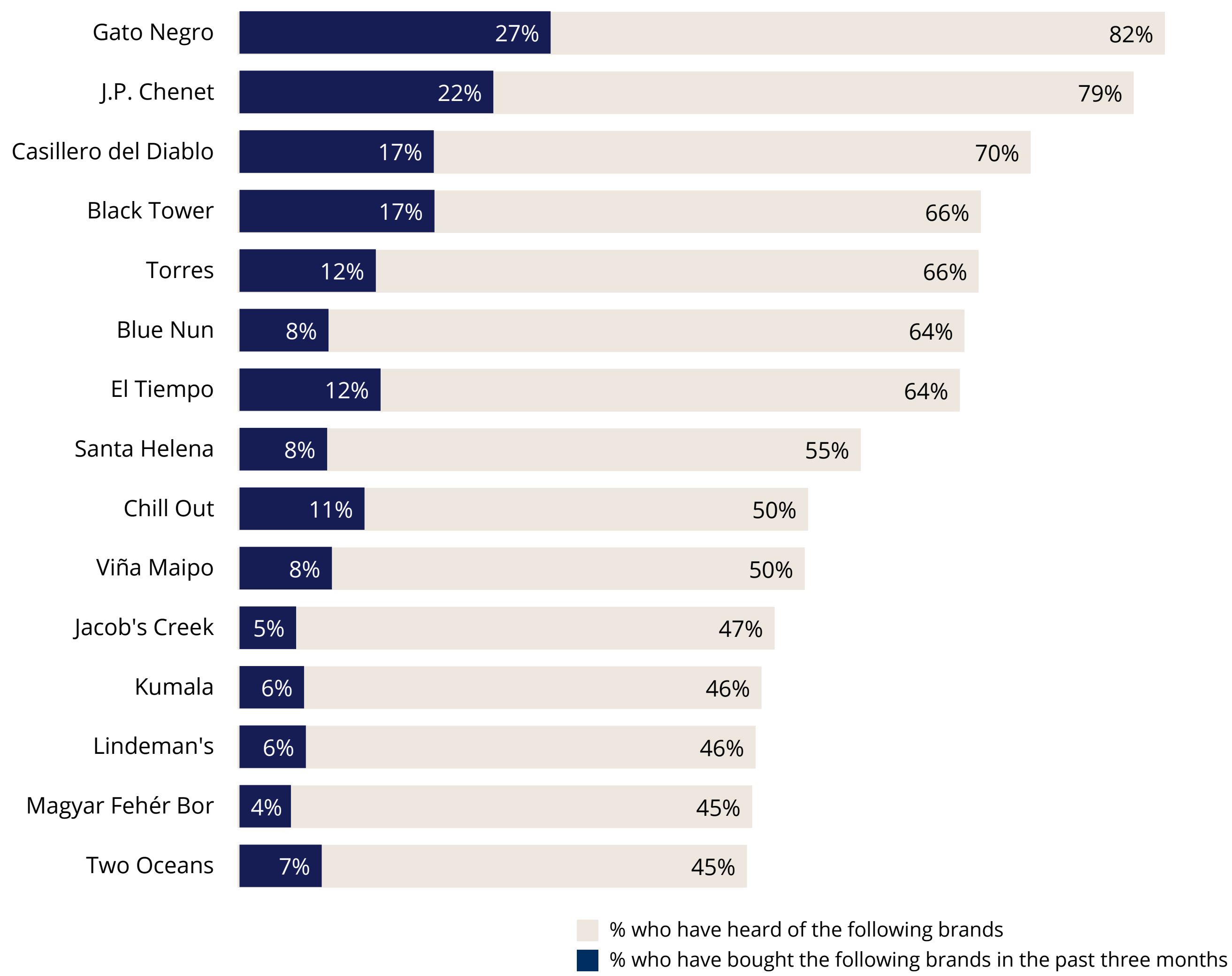
Source: Wine Intelligence, Vinitrac®, Finland, Feb '22, Feb '23, (n≥1,014) Finnish regular wine drinkers

Brand health: Consumption and awareness

Higher awareness indices do not necessarily translate into more purchases for the top brands in Finland

Brand health: Top 15 awareness and consumption levels

Base = All Finnish regular wine drinkers (n=1,014)



Source: Wine Intelligence, Vinitrac®, Finland, Feb '23, (n=1,014) Finnish regular wine drinkers

Brand awareness: Tracking

In line with country and region measures, brand awareness has declined significantly across the brands tracked in Finland

Awareness: Tracking

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

Ranking '23		2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
1	Gato Negro	89%	84%	82%	↓	→
2	J.P. Chenet	86%	84%	79%	↓	↓
3	Casillero del Diablo	75%	74%	70%	↓	↓
4=	Black Tower	68%	69%	66%	→	→
4=	Torres	78%	75%	66%	↓	↓
6=	Blue Nun	78%	74%	64%	↓	↓
6=	El Tiempo	72%	71%	64%	↓	↓
8	Santa Helena	65%	62%	55%	↓	↓
9=	Chill Out	56%	58%	50%	↓	↓
9=	Viña Maipo	62%	58%	50%	↓	↓
11	Jacob's Creek	60%	56%	47%	↓	↓
12=	Kumala	61%	56%	46%	↓	↓
12=	Lindeman's	56%	52%	46%	↓	↓
14=	Magyar Fehér Bor	50%	51%	45%	↓	↓
14=	Two Oceans	47%	48%	45%	→	→

Ranking '23		2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
16	Campo Viejo	47%	48%	42%	↓	↓
17	Espíritu de Chile	48%	46%	41%	↓	↓
18	Luna Negra	50%	45%	40%	↓	↓
19	Yellow Tail	53%	48%	39%	↓	↓
20	Tarapacá	45%	42%	37%	↓	↓
21	Santiago 1541	39%	37%	36%	→	→
22	Viña Albali	41%	40%	33%	↓	↓
23=	Santa Ana	37%	36%	32%	↓	→
23=	Hardys	39%	38%	32%	↓	↓
25	Pearly Bay	39%	36%	31%	↓	↓
26	Ballet	37%	32%	30%	↓	→
27=	Masi	37%	32%	29%	↓	→
27=	Cono Sur	44%	33%	29%	↓	↓
27=	Duas Uvas	17%	24%	29%	↑	↑
30=	Raimat	36%	34%	26%	↓	↓

Results for all brands available in the data table

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

Brand purchase: Tracking

Brand purchase has remained broadly stable for most brands in Finland, with some notable exceptions among those from Chile

Purchase: Tracking

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

Ranking '23		2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
1	Gato Negro	25%	24%	27%	→	→
2	J.P. Chenet	24%	23%	22%	→	→
3=	Black Tower	15%	15%	17%	→	→
3=	Casillero del Diablo	19%	17%	17%	→	→
5=	El Tiempo	11%	11%	12%	→	→
5=	Torres	18%	15%	12%	↓	↓
5=	Duas Uvas	7%	12%	12%	↑	→
8	Chill Out	13%	13%	11%	→	→
9	Espíritu de Chile	11%	10%	9%	↓	→
10=	Viña Maipo	11%	11%	8%	↓	↓
10=	Yellow Tail	10%	8%	8%	↓	→
10=	Blue Nun	10%	11%	8%	→	↓
10=	Santa Helena	10%	8%	8%	→	→
14=	Cono Sur	10%	8%	7%	↓	→
14=	Pearly Bay	7%	6%	7%	→	→

Ranking '23		2020 (n=1,002)	2021 (n=1,000)	2023 (n=1,014)	Tracking vs. '20	Tracking vs. '21
14=	Two Oceans	9%	8%	7%	→	→
14=	Tarapacá	9%	10%	7%	↓	↓
18=	Lindeman's	10%	8%	6%	↓	→
18=	Kumala	6%	7%	6%	→	→
20=	Luna Negra	6%	4%	5%	→	→
20=	Footmark	7%	6%	5%	↓	→
20=	Campo Viejo	6%	6%	5%	→	→
20=	Jacob's Creek	9%	9%	5%	↓	↓
20=	Viña Albali	6%	6%	5%	→	→
25=	Magyar Fehér Bor	5%	6%	4%	→	→
25=	Nederburg	3%	4%	4%	→	→
25=	Montalto	3%	4%	4%	→	→
25=	Santiago 1541	5%	5%	4%	→	→
29=	Ballet	4%	4%	3%	→	→
29=	Hardys	4%	5%	3%	→	↓

Results for all brands available in the data table

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

Brand conversion: Tracking

Brand conversion has remained broadly stable despite large declines in awareness

Conversion: Tracking

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

Ranking '23		2020	2021	2023	Tracking vs. '20	Tracking vs. '21
1	Duas Uvas	43%	49%	41%	→	→
2	Gato Negro	28%	28%	33%	↑	↑
3	J.P. Chenet	28%	28%	28%	→	→
4=	Black Tower	22%	21%	26%	→	→
4=	Cono Sur	24%	25%	26%	→	→
6	Casillero del Diablo	25%	23%	24%	→	→
7	Pearly Bay	18%	15%	23%	→	↑
8=	Chill Out	24%	22%	21%	→	→
8=	Espíritu de Chile	24%	23%	21%	→	→
8=	Footmark	25%	22%	21%	→	→
11	Yellow Tail	20%	17%	20%	→	→
12=	El Tiempo	15%	16%	19%	↑	→
12=	Tarapacá	21%	24%	19%	→	→
12=	Montalto	12%	17%	19%	→	→
15	Torres	22%	20%	18%	↓	→

Ranking '23		2020	2021	2023	Tracking vs. '20	Tracking vs. '21
16=	Nederburg	10%	13%	16%	↑	→
16=	Viña Maipo	18%	20%	16%	→	→
16=	Two Oceans	19%	18%	16%	→	→
19	Viña Albali	14%	14%	15%	→	→
20=	Wakefield	14%	8%	14%	→	→
20=	Santa Helena	15%	14%	14%	→	→
22=	Luna Negra	12%	10%	13%	→	→
22=	Frontera	15%	13%	13%	→	→
22=	Lindeman's	17%	15%	13%	↓	→
25=	Raimat	11%	12%	12%	→	→
25=	Yalumba	14%	12%	12%	→	→
25=	St. Elmo Village	9%	6%	12%	→	↑
25=	Kumala	10%	12%	12%	→	→
25=	Blue Nun	12%	15%	12%	→	→
25=	Sunrise	11%	9%	12%	→	→

Results for all brands available in the data table

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

Brand consideration: Tracking

Brand consideration has remained stable in the Finnish market since 2020

Consideration: Tracking

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

Ranking '23		2020	2021	2023	Tracking vs. '20	Tracking vs. '21
1	Duas Uvas	67%	60%	52%	↓	→
2	Gato Negro	49%	47%	50%	→	→
3=	Cono Sur	48%	53%	49%	→	→
3=	J.P. Chenet	48%	47%	49%	→	→
5	Espíritu de Chile	48%	48%	48%	→	→
6	Yellow Tail	48%	50%	47%	→	→
7	Torres	48%	47%	46%	→	→
8=	Casillero del Diablo	46%	42%	45%	→	→
8=	Chill Out	42%	41%	45%	→	→
8=	Tarapacá	45%	47%	45%	→	→
11=	Pearly Bay	36%	38%	44%	↑	→
11=	Footmark	48%	43%	44%	→	→
13	Black Tower	41%	42%	43%	→	→
14	Jacob's Creek	44%	38%	42%	→	→
15=	Montalto	44%	43%	41%	→	→
15=	Two Oceans	42%	41%	41%	→	→
17	Kumala	41%	41%	40%	→	→
18	Lindeman's	41%	42%	39%	→	→
19	Nederburg	40%	41%	38%	→	→
20=	Viña Albali	35%	35%	37%	→	→
20=	Frontera	37%	36%	37%	→	→
22=	Les Dauphins	35%	41%	36%	→	→
22=	Viña Maipo	42%	42%	36%	→	↓
22=	Ruffino	30%	31%	36%	→	→
22=	Santa Helena	34%	35%	36%	→	→
26=	Trapiche	36%	38%	35%	→	→
26=	Raimat	41%	37%	35%	→	→
26=	Yalumba	44%	38%	35%	→	→
26=	Masi	35%	35%	35%	→	→
30	El Tiempo	30%	32%	34%	→	→

Results for all brands available in the data table

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

Brand affinity: Tracking

In line with brand consideration, brand affinity has remained stable in the Finnish market since 2020, though top brand Duas Uvas is a notable exception

Affinity: Tracking

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

Ranking '23		2020	2021	2023	Tracking vs. '20	Tracking vs. '21
1	Duas Uvas	38%	38%	28%	↓	↓
2=	J.P. Chenet	25%	24%	24%	→	→
2=	Montalto	17%	21%	24%	→	→
4=	Cono Sur	20%	25%	23%	→	→
4=	Gato Negro	23%	21%	23%	→	→
6=	Casillero del Diablo	22%	22%	19%	→	→
6=	Black Tower	22%	18%	19%	→	→
8=	Espíritu de Chile	24%	20%	18%	→	→
8=	Yellow Tail	21%	19%	18%	→	→
8=	Torres	23%	19%	18%	↓	→
8=	Tarapacá	21%	21%	18%	→	→
12	Chill Out	20%	14%	17%	→	→
13	Two Oceans	19%	13%	16%	→	→
14=	Raimat	16%	17%	15%	→	→
14=	Viña Maipo	16%	15%	15%	→	→

Ranking '23		2020	2021	2023	Tracking vs. '20	Tracking vs. '21
14=	Murviedro	8%	7%	15%	→	→
14=	Mouton Cadet	15%	11%	15%	→	→
14=	Penfolds	15%	13%	15%	→	→
14=	Pearly Bay	16%	12%	15%	→	→
20=	Nederburg	14%	16%	14%	→	→
20=	Yalumba	17%	14%	14%	→	→
20=	Santa Helena	14%	12%	14%	→	→
20=	Footmark	21%	13%	14%	↓	→
20=	Ruffino	11%	14%	14%	→	→
25=	Les Dauphins	12%	10%	13%	→	→
25=	Lindeman's	18%	18%	13%	↓	↓
25=	Hardys	16%	15%	13%	→	→
25=	Viña Albali	14%	12%	13%	→	→
25=	Jacob's Creek	17%	16%	13%	→	→
25=	Masi	12%	15%	13%	→	→

Results for all brands available in the data table

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

Brand recommendation: Tracking

In line with other connection measures, recommendation has remained stable in Finland since 2020, apart from front runner Duas Uvas and Torres

Recommendation: Tracking

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

Ranking '23		2020	2021	2023	Tracking vs. '20	Tracking vs. '21
1	Duas Uvas	45%	46%	34%	↓	↓
2	J.P. Chenet	30%	31%	31%	→	→
3	Gato Negro	28%	29%	30%	→	→
4	Cono Sur	22%	31%	29%	↑	→
5	Black Tower	25%	24%	28%	→	→
6	Casillero del Diablo	27%	28%	26%	→	→
7=	Chill Out	24%	23%	25%	→	→
7=	Yellow Tail	25%	26%	25%	→	→
7=	Montalto	24%	25%	25%	→	→
10=	Footmark	23%	20%	24%	→	→
10=	Two Oceans	23%	20%	24%	→	→
12=	Yalumba	22%	15%	22%	→	→
12=	Pearly Bay	18%	19%	22%	→	→
12=	Espíritu de Chile	24%	25%	22%	→	→
12=	Tarapacá	26%	26%	22%	→	→

Ranking '23		2020	2021	2023	Tracking vs. '20	Tracking vs. '21
16=	Nederburg	16%	19%	21%	→	→
16=	Lindeman's	24%	24%	21%	→	→
16=	Torres	30%	24%	21%	↓	→
19	Penfolds	20%	21%	20%	→	→
20=	Mouton Cadet	18%	20%	19%	→	→
20=	Jacob's Creek	21%	18%	19%	→	→
22=	Raimat	22%	23%	18%	→	→
22=	Wolf Blass	16%	22%	18%	→	→
22=	Blue Nun	17%	18%	18%	→	→
22=	Kumala	19%	18%	18%	→	→
26=	Masi	17%	16%	17%	→	→
26=	Les Dauphins	20%	17%	17%	→	→
26=	Santa Helena	14%	18%	17%	→	→
29=	Viña Albali	14%	17%	16%	→	→
29=	El Tiempo	13%	14%	16%	→	→

Results for all brands available in the data table

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

Research Methodology

Finland Wine Landscapes

2023

Research methodology

QUANTITATIVE

Data has been collected in Finland since January 2020.

The January 2020 and January 2021 waves were tracked against February 2023.

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 Finnish regular wine drinkers in terms of age and gender*.

The distribution of the sample is shown in the table.

		Jan-20	Jan-21	*Feb-23*
	n=	*1002*	*1000*	*1014*
Gender*	Male	48%	48%	51%
	Female	52%	52%	48%
	Total	***100%***	***100%***	***99%***
Age	18-24	7%	7%	11%
	25-34	14%	14%	17%
	35-44	14%	14%	16%
	45-54	16%	16%	13%
	55 and over	49%	49%	43%
	Total	***100%***	***100%***	***100%***

Source: Wine Intelligence, Vinitrac®, Finland, Jan '20, Jan '21, Feb '23, (n≥1,000) Finnish regular wine drinkers

**Please note that additional gender categories were also surveyed. These categories fell naturally in the sample and were not enforced via quotas*

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