



Wine Intelligence

Russia: Wine Market Landscape Report

2011

Copyright

© Wine Intelligence 2011

- All rights reserved. No part of this publication may be reproduced in any form (including photocopying or storing it in any medium by electronic means) without the permission of the copyright owners. Application for permission should be addressed to Wine Intelligence.
- The source of all information in this publication is Wine Intelligence unless otherwise stated.
- Information from Wine Handbook is reproduced by kind permission of Adams Beverage Group; ©Wine Handbook 2009.
- Information from IWSR is reproduced by kind permission of IWSR; © IWSR 2010.
- Wine Intelligence shall not be liable for any damages (including without limitation, damages for loss of business or loss of profits) arising in contract, tort or otherwise from this publication or any information contained in it, or from any action or decision taken as a result of reading this publication.
- Wine Intelligence Ltd: 109 Maltings Place, 169 Tower Bridge Road, London SE1 3LJ Tel: 020 7378 1277. E-mail: info@wineintelligence.com. Registered in England as a limited company number: 4375306

- **Market overview** pg.8
 - Russian economy
 - Russia and wine
 - Russia and imported wine
 - Cities in Russia where most imported wine is consumed
 - Regulatory framework
- **Global wine market** pg. 22
 - International volume trends
 - BRIC country wine consumption
- **Russia wine market** pg. 28
 - Russia wine volume trends
 - Category drivers
 - Russia still and sparkling wine imports by country of origin
- **Russian imported wine drinkers** pg.35
 - Overview: Russian consumers
 - Demographics: Age and gender
 - Alcoholic beverage repertoire
 - Attitudes towards wine
- **Russia imported wine purchase** pg.43
 - Choice cue
 - Wine purchase channels
 - Occasions of consumption
 - Spend on wine
- **Russia imported wine consumption** pg.53
 - Country of origin (awareness and penetration)
 - Region (awareness and penetration)
 - Brand (awareness and penetration)
- **Profiling by gender** pg.67
- **Profiling by age** pg.80
- **Profiling by city** pg.93
- **Appendix** pg.105
 - Selling wine in Russia
 - Importers and retailers profiles
 - Wine Intelligence Vinitrac® methodology

IWSR methodology

- Measures from the IWSR correspond to actual wine consumption figures. This means sales into the trade (on + off premise)
- The IWSR visits each market each year. Discussions are held with key local experts in the market including importers, producers, grey market operators, duty free operators, and supermarket/hypermarket buyers.
- All volume data is given in thousand 9 Litre Cases
- In the breakdown by country of origin, IWSR includes (depending on the market and the size of the category) the following two categories: 'Other' and 'International' They are defined as followed:
 - 'Other': category including wine blends (normally in bulk or bottled without specified country of origin) and wines from other countries with volumes too small to break out separately
 - 'International': Category including wine brands that have wines from various countries
- The IWSR includes the following types of wine in its definition of 'wine':

Definitions	
Wine = Still light wine + Sparkling + Fortified + Light apperitifs (vermouth...) + Other (rice wines...)	} Sub-categories

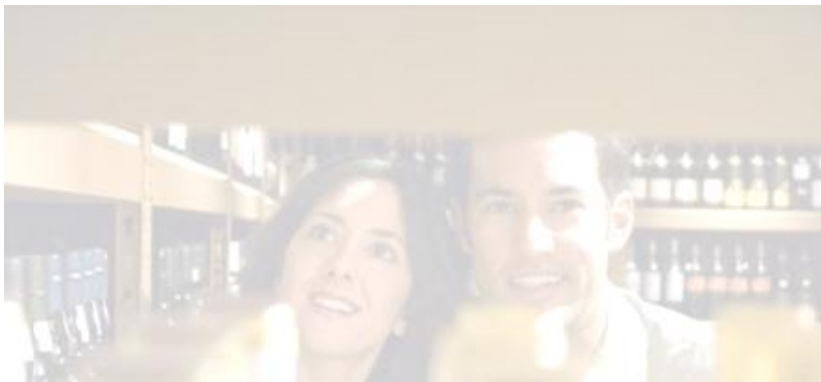


Vinitrac® - how can it help you understand wine consumers and their needs?

Vinitrac® is the only global survey that monitors and tracks wine consumers' attitudes, behaviour and relationship with wine

Vinitrac® monitors every aspect of wine drinkers' wine lives - from what they drink, where they purchase to their attitude to wine brands and countries of origin...

...it even monitors what varietals they favour and what they think of different closures



Frequently asked questions

Why is Vinitrac® not a panel?

- Panels are good for monitoring detailed purchase activity, but require regular input from the exactly the same complete group of respondents
- This requires more time from respondents, for which they are paid, and are therefore more heavily skewed towards home-based consumers, e.g. students and home-makers
- This group of a country's wine-drinking population does not fully represent the accurate weighted sample of adult regular wine drinkers on which Vinitrac® insights are based

How does Vinitrac® work?

- Invitations to participate in Vinitrac® are distributed to adult consumers in each market
- Consumers interested in a wine survey are directed to an URL address, which welcomes them to the online survey
- Wine Intelligence monitors incoming completed responses to build a sample representative the wine drinking population of the target market
- When a representative sample of at least 1,000 (US: 2,000) is logged, the survey is closed

Vinitrac® Methodology: Russia online survey

- Data collection:
 - The data for this report was collected in February 2011
 - Data was gathered via Wine Intelligence's Vinitrac® Russia online survey and is representative of Russian imported wine drinkers
 - Respondents were aged 18+ and lived in Moscow or St Petersburg
- Screening criteria:
 - Respondents were required to drink red, white or rosé wines at least twice a year and imported wine at least once a year.
- Data processing:
 - Invalid responses (those who completed the survey too quickly, or who "straight-lined" through selected questions) were removed from the sample
 - The survey was post-weighted in terms of age, gender and division of residence
- Sample distribution:
 - The total valid sample size in Feb'11, n= 1,032
 - The distribution of the sample can be seen in the table to the right

Russia		
February 2011		
	Total	1,032
GENDER	Male	41%
	Female	59%
	Total	100%
AGE	18-24	13%
	25-34	25%
	35-44	24%
	45-54	22%
	55 and over	17%
	Total	100%
REGION	Moscow	66%
	St Petersburg	34%
	Total	100%

Copyright
© Wine Intelligence 2011

Single-user licence = £3,000

For more information about Wine Intelligence and the
Wine Intelligence Wine Market Landscape Report Series, please contact us:

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

Telephone: +44 (0) 207 378 1277
Email: info@wineintelligence.com
Web: www.wineintelligence.com

