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Italian sparkling wine on Polish market: the case of Franciacorta DOCG

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Summary

Abstract

Poland has traditionally been known as a nation where beer and vodka were the two most popular alcoholic beverages. Since 2004, after Poland's entrance into the European Union, Poles and especially young people have been starting to travel abroad and returned to Poland with new cultural and alcoholic experiences. Hence, wine consumption in Poland has changed throughout time. This country is one with the quickest economic development rates in the EU and it is also gaining power inside the EU, due to the consistent expansion of its economy and gross domestic product (GDP) per capita (Aswani, 2021). The growing income influences Polish customers' willingness to spend more for products that stand out for their quality and exclusivity (i.e., premiumization trend), as for premium sparkling wines. The purposes of developing this dissertation are to find out the motivations behind the Polish customers' interest in premium sparkling wines when making their wine selection. The aim is to understand which factors influence the interest in sparkling wines features for Poles. In addition, another goal of this thesis is to provide insights about the commercial potential of Franciacorta DOCG, an Italian premium sparkling wine, in the Polish wine market. Data were gathered through two qualitative surveys (via questionnaires): the first addressed Polish wine customers (152 respondents) and the other professionals from the Polish wine industry (107 respondents). *Strength, weaknesses, opportunities, threats* (SWOT) analyses were conducted using the surveys' results. Polish wine consumers' perspectives were first gathered, followed by the specialists' viewpoint. Finally, information from the SWOT analyses was processed to define external factors which revealed potential and danger for the Polish wine market, while internal considerations for Franciacorta DOCG and premium sparkling wines revealed their strengths and shortcomings. Reasons of premiumization trend appear when Polish wine enthusiasts prioritised testing out new alcohol beverages and purchasing better wines for themselves after the Covid-19 pandemic (Aswani, 2021). Wine awareness among Poles is constantly growing, which influences the increase in the demand for new wines on the Polish wine market. The features of sparkling wines that matter most for Polish customers are price, trusted brands, wine origin and the production method. The market potential of Franciacorta DOCG in Poland is high, although the strategies which will help to outspread the market of this wine in Poland have to be developed. Results show a need for expanding promotional activities to make the wine recognisable and widely

available among Poles, and for adjusting on the price of Franciacorta DOCG price in Poland to make it more affordable for customers.

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1. Chapter 1.

Introduction

Italy is well known for its excellent wines not only in domestic market but also internationally. Regarding to International Organisation of Vine and Wine (OIV) report from 2020, Italy is leader in worldwide wine production and its export. Producers are cultivating vines with respect to terroir and tradition, which provide consumer high quality wines (Van Leeuwen & Seguin, 2006).

Franciacorta DOCG represents a high-quality Italian sparkling wine, produced by Classic method, which means that wine is bottle-fermented (Ruggeri et al., 2020). Italian sparkling wines produced this way stand for 5 % of the domestic production, whereas 92 % of sparkling wine production is dominated by wines made by the Martinotti method, and the remain 3 % is made of wines without appellations (Bassi et al., 2020). As reported by Consorzio per la tutela del Franciacorta (2022), in 2021 10.3 % of Franciacorta DOCG bottles have been sold abroad, which makes its consumption mainly domestic.

Poland is a centrally located country in Europe that through the past years has been steadily growing not only from the economic point of view (EACEA, 2022), but also in the case of wine consumption. Increasing Poles wine knowledge and demand may make the Polish market interesting, as a potential wine importer (Trestini et al., 2020).

This chapter is dedicated to providing the background of studies, while the following chapters will present the research questions, data analysis and the discussion of the results and, finally, the limitations.

Wine is a beverage known and consumed since ages. The globalization of wine industry led to create heterogenous, highly competitive market where quality plays an important role in consumer's choice (Miglietta & Morrone, 2018). In 2018, 80 % of the worldwide production of sparkling wine was concentrated around top five countries: Italy 27 %, France 22 %, Germany 14 %, Spain 11 %, USA 6 %. Until 2016, still wines led the way in the international trade, but since 2018 sparkling wines are become more traded internationally, stands for 48 % market share compared to 43 % share for still wines. World sparkling wine consumption in 2018 reached 19 million hectolitres, which can lead to reflection on motivation for its consumption (OIV, 2020).

As stressed by Charters and Pettigrew (2008), wine consumption can be explained by triadic paradigm, which is based on physical, symbolic, and experiential consumer needs or combination of all of them. The research shows that the most important motivational factor for wine consumption is linked with wine drinker enjoyment, which influence their mood. Thome and Paiva (2020) highlight a strong association of sparkling wines with symbolic functions. Consumers used to identify this category of wine with special occasions during which it can be consumed. However, sparkling wine market has undergone changes (Bassi et al., 2020). Nowadays, deseasonalisation of its consumption has been observed (OIV, 2020).

Lai (2019) assumes that differentiation in consumer approach on wine can arise from their culture. Non-traditional wine consumption countries can be described as "New buyers" (Trestini et al., 2020). Growing affluence affect wine market differentially. In countries of traditional consumption, it has been observed a decreasing consumption of low-quality wine and an increasing demand for high quality ones. Whereas for "New buyers" opposite effect occurred with mass marketing of lower quality wines (Thorpe, 2009). Likewise, Smith and Mitry (2007) also confirmed different drinking patterns among European citizens. Mediterranean countries are well-known of their traditional wine consumption, while in Western and Northern Europe beer is a primary alcoholic beverage. However, the rise of new consumption trends led to changes within non-traditional countries. Growth in country's economy, change in lifestyle and the easier access of transnational corporation to new trade, have been established as major forces that influence the market.

Schaefer *et al*. (2018) investigated research on Polish market as a non-traditional country with rapid changes in the case of wine market. According to researchers, the amount of wine consumed per person varies depending on the specific country's economic situation and consumer preferences for less-alcoholic beverages, due to the rising health consciousness. Within their findings one important assumption has been concluded, which can be a hint for potential wine exporters, "Transitional markets such as Poland may provide wine firms the opportunity for growth, something which is often more difficult to achieve in saturated mature markets" (2018, pp. 10).

This thesis is performed to answer the following research questions:

1. Which sparkling wine characteristics are seen by Polish consumers as important while they choose wine?

2. Which is the market potential (e.g., opportunities) of Franciacorta DOCG in the Polish wine market?

Answering these research questions will provide insights for Franciacorta DOCG industry about new export opportunities in a non-traditional wine market. It will help understand how non-traditional countries such as Poland can experience the market development for high-quality Italian wines.

Chapter 2 will provide overview about sparkling wine sector in Italy, with the data about its production and export on international area.

In Chapter 3 information about Franciacorta DOCG history, terroir and its demand market will be explained.

Next, in the Chapter 4, Polish wine market will be presented.

Chapter 5 and chapter 6 present the analysis carried out in this thesis. Particularly, data and methods will be described. Two surveys are indeed the core of the thesis: one on Polish consumers' preferences/opinions on Franciacorta DOCG and the other on Polish wine professionals' preferences/opinions on premium sparkling wines and Franciacorta DOCG. The collected answers were used to perform the strengths, weaknesses, opportunities, and threats (SWOT) analysis. Based on the results, threats, opportunities, weaknesses, and strengths (TOWS) matrix is built and, finally, strategic approaches for the development of Franciacorta DOCG on the Polish wine market are discussed.

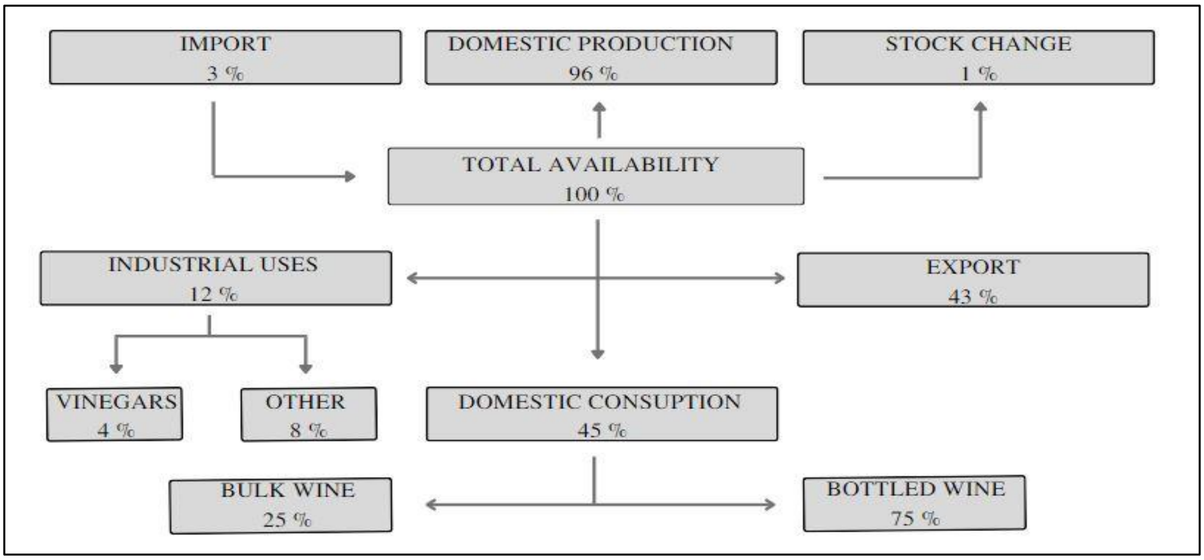
One limitation of this study is the limited geographical area for the research (mainly Cracow city). Furthermore, strategies that will be developed for Polish wine market cannot necessarily fit for other non-traditional wine countries.

2. Chapter 2.

Italian sparkling wine sector

Throughout ten years, the Italian sector of sparkling wines has undergone changes due to the worldwide success of Prosecco wine. Thereafter, supermarkets have enriched their offer of sparkling wines selection (Bassi et al., 2020). Accordingly, sparkling wines can vary with respect to brands, production method, appellations, grape variety, etc. Italian wines can be classified also according to the Geographical Indication System (Bassi et al., 2021). Geographical Indications (GI) characterize wines in terms of vinification process, *terroir,* and tradition. In Italy, the GI system includes Denominazione di Origine Controllata e Garantita (DOCG), Denominazione di Origine Controllata (DOC) and Indicazione Geografica Tipica (IGT) (Stasi et al., 2011).

Figure 1. Flowchart of Italian wine supply chain



Source: ISMEA, scheda di settore, 2022.

As it is presented above, in 2021 the export of Italian wines (43%) is almost equal to its domestic consumption (45%) which plays a significant role for the Italian wine market.

As reported by Mediobanca (2021), the production of sparkling wines increased by +21% and still wines + 12,4% compared to wine production in 2020. According to the Italian Wine Union Observatory (UIV, 2021), 2021 was the record year for the consumption of Italian sparkling wines. 316 million bottles were consumed, that is +18,3% compared to 2020 and 50% more than the previous five years. Moreover, around the 75% of those bottles were destined abroad, while only 88 million bottles are for domestic consumption. For the first time, in 2021 the value of Italian sparkling wines exceeded 2,4 billion €; this gain was accompanied by a production volume that has increased by +170 % over the past ten years. Moreover, nowadays in the case of Italian wines export, bubbles stand for +25% of the overall export.

New trends appeared in the case of Italian wine consumption, there are: premiumization (the endeavour to make a product or brand more appealing to customers by highlighting its better quality and exclusivity) and greater attention to sustainability. As refer to the first, in 2021 Icon and Premium wines achieved a double-digit increase, respectively +33,2% and +20,2% compared to the 2020, leaving behind basic wines with the growth by +8,7%. In the case of sustainability, vegan wines reached a high consumer interest (+24,8%). There is also a growing interest for natural (+6,9%) and biodynamic (+2,4%) wines, each confined for 1% market share (Mediobanca, 2021).

2.1 Definition of sparkling wine

The OIV Code of Oenological Practices (Code I.4.4-4, 2015) defines sparkling wine as a special product, along with carbonated and other special wines, which has been produced under the conditions specified by the OIV. Furthermore, according to the Regulation (EU) No 1308/2013, sparkling wine is obtained from grapes, grape must or from wine by alcoholic fermentation, which effect in carbon dioxide while processing.

According to the product specification, sparkling wines are distinguished - based on their production technique - between wines with secondary fermentation taking place in the bottles or in the closed tanks. As a result of a vinification process, the final product is characterised by the presence of endogenous carbon dioxide which pressure in the bottle is supposed to be at least at the level of 3 bars considering bottle capacity below 0,25l, and 3,5 bars above 0,25l at 20°C. Furthermore, residual sugar in sparkling wine defines its classification which is presented in Table 1. In the Harmonized System (HS), the Code identifying sparkling wines is 220410.

Table 1. Classification of sparkling wines based on the residual sugar content.

NOMENCLATURE	RESIDUAL SUGAR
Brut	0 – 12 g/l with a tolerance of + 3 g/l
Extra-dry	12 – 17 g/l with a tolerance of + 3 g/l
Dry	17 – 32 g/l with a tolerance of + 3 g/l
Demi-sec	32 – 52 g/l
Sweet	> 50 g/l

Source: OIV, 2018.

2.2 Methods of sparkling wine production

The first mentions of sparkling wine can be already heard from the ancient times, where Romans used to call their bubbly wines as *Vinum titillum* (Di Gianvito et al., 2019). Until the XVI century, bubbles occurring during secondary fermentation in base wine were treated as enemies for winemakers, due to bottles explosions caused by the high pressure of carbon dioxide. However, arising preferences for sparkling wines mainly by the British Royalty led French winemakers to start focusing on quality production for sparkling wines, which took place in the Champagne region. Over time, the production of sparkling wine has been expanded to all around the World and within new methods winemakers had influenced its final character (Jones et al., 2014).

Styles of sparkling wines differ with respect to the pressure inside the bottle. Indeed, it is responsible for perception of bubbles: with high pressure, bubbles are perceived as finer (Puckette, 2019). Along with CO_2, active compounds, called surfactants influence sparkling wine perception by consumers. They are taking part in the foam formation which stands for another characteristic cue which distinguishes a sparkling wine from a still one (Pozo-Bayón et al., 2009). Winemakers, by choosing the appropriate method of production, can take control over the fermentation process which influences secondary aromas and aging process responsible for tertiary aromas in wine (Buxaderas & López-Tamames, 2012).

New technologies and expanding oenologists' knowledge are the reasons why the wine world is fulfilled with differentiation of sparkling wine styles. Nowadays, five major techniques of vinification can be highlighted as the most used ones. Within these there are: Transfer Method, Ancestral, Continuous, Classic, and Martinotti (see table 2).

Table 2. Methods of production for sparkling wines

Method name	Bottle pressure (atmospheres)	Examples of wines
Transfer	5 - 7	Australian Sparkling Shiraz
Ancestral	2 - 4	Loire
Continuous	4 - 5	Lancers
Classico	5 - 7	Franciacorta
Martinotti	2 - 4	Prosecco

Source: WineFolly, 2022

In Transfer Method, base wine is filtered for lees removal and then pressurized again for bottling, where the secondary fermentation occurs. This method is used mainly for bottles smaller than 750 ml or large than 1,5 l and more. The name Ancestral Method indicates to be one of the first method for sparkling wine production, where primary fermentation is stopped in the middle by lowering the temperature, wine is filtered and is kept for several months in tanks in anticipation of secondary fermentation that later occurs in bottles. In the Continuous Method, yeasts are added continually, thus the pressure in the bottle can achieve higher level of atmospheres. Finally, the two most appropriate methods for sparkling wine production are Classic Method and Martinotti (Puckette, 2019). Due to their importance in the wine world, the next two chapters will explain the process of vinification within the use of those methods.

2.2.1 Metodo Classico

Methods of production for bottle-fermented sparkling wines can be named differently due to the country, where the vinification takes place. The term of winemaking technology that is considered as the first in the wine world and which was described by the French monk Dom Pierre Pérignon to obtain bubbles is called *Champenoise.* Its name can be used exclusively in the Champagne region, the remaining French regions can name their wines as a Crémant (Di Gianvito, 2019). Carlo Garcia was a pioneer, who introduced in Italy a special technique, which he studied in France, but it took him 15 years to produce fermented wines and to obtain the patent for its vinification, which was known as “Moscato Champagne”. Nowadays, the method is called Metodo Classico (Sergio et al., 2015). In Spain the term Traditional

Method is used to describe bottle-fermented wines and in the New Word as South Africa it has been called *Méthode Cap Classique* (Di Gianvito, 2019). Despite this name differentiation, all of them describe vinification process in which secondary fermentation occurs inside the bottle with CO_2 production.

Vinification process by Metodo Classico starts with grape harvesting, after determined harvest date due to fruit maturity and chemical performance, which have significant influence on the final product quality (Jones et al., 2014). The primary fermentation happens the same way as in the other methods in steel tanks, within temperature control that is kept below 20°C to prevent the lost of aromas (Buxaderas & López-Tamames, 2012). The stabilisation of post-blended base wine occurs before secondary fermentation. To prepare the base wine for bottle fermentation, *tirage liquor* is added. Its ingredients are usually set by winemakers, mainly containing selected yeasts, sucrose, and riddling aids (Kemp et al., 2015). The secondary fermentation occurs in bottles, with the CO_2 production. The phase is called also *prise de mousse*, due to foam presence that appears when filling the glass with wine. Maturation on lees is the next step required by law. The maturation timing depends on the style of the future sparkling wine, with longer aging providing higher organoleptic characteristics. The preparation for lees removing happens via riddling, which means sedimentation at the neck of the bottle. This process is supported by progressive bottle twist every $1/8^{th}$ at the angle of 20-30° downward. After, the bottle neck is frizzed together with sedimented lees. The resulting plug is removed while bottle opening and immediately the *dosage liquor* is added, to fulfil the free space in the bottle. Usually, it consists of wine bend, sucrose, sulphur dioxide and other substances. The vinification process ends when bottles are corked and left for aging in the horizontal position for a period of time which is determined by the product specification (Buxaderas & López-Tamames, 2012).

Figure 2. Stages of sparkling wine production by Metodo Classico.

GRAPE PRESSING
↓
PRIMARY FERMETATION
↓
RACKING AND BLENDING
↓
STABILISATION AND FILTRATION
↓
ADDITON OF *TIRAGE LIQUOR*
↓
SECONDARY FERMENTATION IN BOTTLE
↓
LEES AGING
↓
RIDDLING
↓
DISGORGING
↓
ADDITION OF *DOSAGE LIQUOR*
↓
BOTTLING

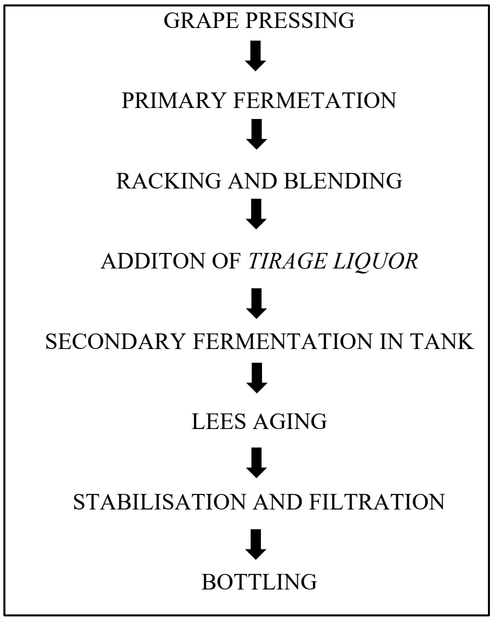
Source: Vecchio et al., 2019 (The role of production process and information on quality expectations and perceptions of sparkling wines, p. 132. Copyright 2019 by Society of Chemical Industry).

2.2.2 Martinotti method

The history of Martinotti method for sparkling wine production begins in 1895, when the Italian oenologist Federico Martinotti developed and patented the vinification process for secondary fermentation under controlled conditions in big containers. However, it owes its popularity to French oenologist Eugène Charmat, who transformed and used it on industrial scale and therefore the method is also well-known as a Charmat (Butnariu & Butu, 2020).

The vinification process does not differ from Metodo Classico until the secondary fermentation happens. As for Martinotti method, the secondary fermentation as well as the primary occur in stainless steel tanks within controlled parameters. Therefore, winemakers are able to guide the vinification process along within their assumptions. The fermentation stops when the pressure in the tank achieves 4 atm of CO_2. At the same time, the temperature in tank is reduced below 10°C, thereafter yeasts sediment to the tank bottom. According to lees aging time, Martinotti method can be classified as short or long: short where lees aging lasts 1-3 months and wine obtains fresh and fruity aromas, whereas long lasts around 6 months which guarantees a richer structure of wine and more developed aromas. Wine is filtered and stabilised and filled into bottles (Buxaderas & López-Tamames, 2012).

Figure 3. Stages of sparkling wine production with Martinotti Method.

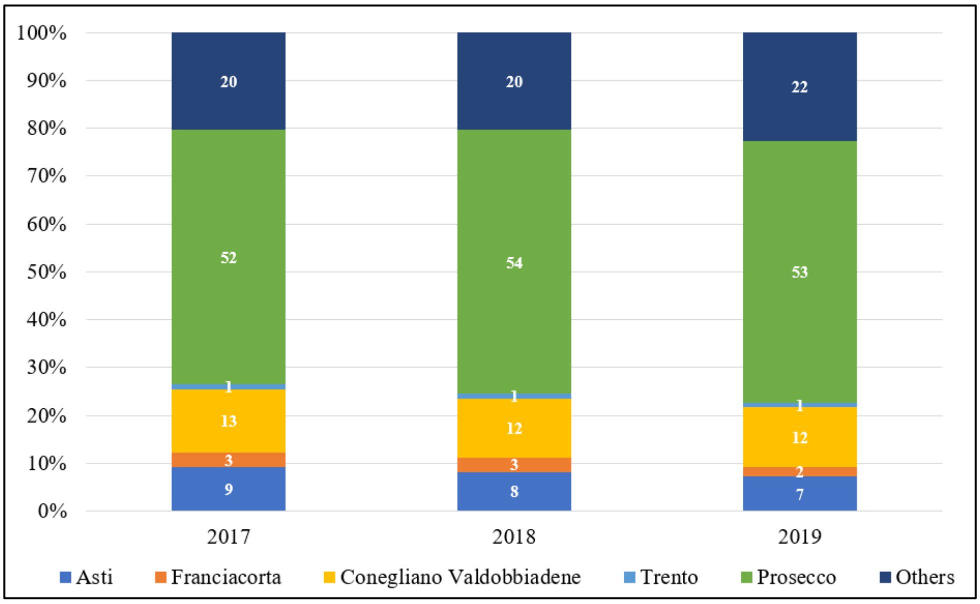


Source: Vecchio et al., 2019 (The role of production process and information on quality expectations and perceptions of sparkling wines, p. 132. Copyright 2019 by Society of Chemical Industry).

2.3 The Italian sparkling wine production

At the beginning of 2000, the share of global sparkling wine production was on the level of 14 mhl of wine, whereas nowadays it reaches 20 mhl, which stands for +42.9 % increase of its production. Through years, within ups and downs, the annual growth of sparkling wine production fluctuates at the level of 7 %. In 2018, Italy produced 5,3 mhl of sparkling wines, which stood for 10 % of the world sparkling wine production (OIV, 2020).

Figure 4. Percentage composition of production of Italian sparkling wines, 2017-2019



Source: Ismea, Spumanti: tendenze e dinamiche recenti, 2020.

Lately, the Italian sparkling wine market undergone changes due to so called "Prosecco phenomenon" (Bassi et al., 2020). A new regulation establishing an expanded area of Prosecco production was created in 2009 as a result of rising demand for the wine. Consequently, this change affected its supply, which increased up to 35 % in the following years (Onofri et al., 2015). Besides Prosecco and Prosecco Conegliano Valdobbiadene, among the major appellations of Italian sparkling wine we can find Asti produced by Martinotti method and others which are made via Metodo Classico such as Franciacorta or Trento. Although the wide differentiation on the Italian sparkling wine market, this has been dominated by wines obtained by Martinotti method (Bassi et al., 2020). Lower production costs influence its lower finished price, compared to wines produced with Metodo Classico. Furthermore, Bassi and Gastaldello (2018) in their work on the Italian sparkling wine market, presented relationship between wine price and consumers loyalty to wine purchase. Results show pattern of higher purchasing rate and loyalty for Prosecco appellations. Due to its differentiation in the case of price, premium ones (price for bottle above 7 €) benefit from consumer loyalty to appellation, whereas wines produced via Metodo Classico such as Franciacorta or Trento are characterized by higher demand mainly by knowledgeable consumers. Furthermore, sweet sparkling wines like Asti appellation, due to changes within Italian consumer preferences, is characterized by a lower market share with negative trends. In the case of loyalty to wines without appellations, it is based on consumers' tradition of celebrations.

2.4 Export of Italian sparkling wine

In addition to France and Spain, Italy is one of the biggest worldwide sparkling wine exporters. All together stand for 85 % of the worldwide exports with a constant increase since 2008. About 40% of the Italian wine production is destined for export, sparkling wines stands for 25% of these. The main importing countries of Italian wines in volume and value are USA, Germany, and the United Kingdom (MedioBanca, 2022). In 2021, the export of wine increased and exceeded 14 % share of the total export, which makes it the most important export product within the Italian agri-food sector. Prosecco contributes the most to this result, which reach a turnover of over 1,3 billion euro across the border. Indeed, Prosecco covers 75% of the sector export turnover (Ismea Mercati, 2022).

3. Chapter 3.

Franciacorta DOCG

Franciacorta DOCG is an Italian sparkling wine produced by Metodo Classico in Brescia province, in the Lombardy region. From 1995, it stands as a Controlled and Guaranteed Designation of Origin (DOCG) product, which made it the first brut Italian bottled-fermented sparkling wine classified with the highest level of wine certification in Italy.

Franco Ziliani, an Italian oenologist, is considered the father of Franciacorta, as in 1961 he produced the first bottle of this wine. After 60 years of existence, Franciacorta is produced by 121 associated wineries and is gaining popularity abroad as a high-quality Italian sparkling wine (Consorzio per la tutela del Franciacorta, 2022).

3.1 History of Franciacorta

The name of Franciacorta wine refers to the area in Brescia province in Italy. Its origin name is still uncertain and is linked more with legends than with the history. There are three main folktales around the stories of place's beginning. The first one dates from ninth century of the Common Era, when Charlemagne during his descent into Italy at the helm of the army of the Franks to conquer the kingdom of the Lombards, was so impressed by the beauty of the territory that he wished to stop and settle in the middle of "*Francia corta*". Second and the most accredited legend of the Franciacorta name is dated from eleventh century of the CE, when two powerful Orders of Cistercian and Cluniac monks arrived in that area and started to cultivate vast arable lands. Due to that, they obtained the status as "*curtes francae*" meaning area exempt from paying duties to the Lords and the bishop, as the friars dedicated themselves to the recovery of the designated lands and taught the peasants to cultivate the fields, for the transportation and exchange of their goods in other states or holdings. A first mention about the free trade area in Franciacorta appears in the Brescia Book of Statutes dating back to 1277, which stands for a testimony of using the name of the area in Medieval time. The third folktale regards Gabriele Rosa, who was born and died in Iseo in the second half of the nineteenth century CE and refers to the descent of the French troops of Charles of Anjou. The latter, around the thirteenth century CE, escorted to Italy and Pope Clement IV would later nominate him King of Naples. The soldiers stopped in Rovato in Franciacorta where, due to their drunkenness, they heavily annoyed the Rovati girls, to the point of provoking the popular uprising of the villagers who, at the sound of the bells, shouted: "Francesi andatevene via, perché qui la Francia sarà Corta!", meaning "French go away, because France will not last long here" (Fratus, 2022).

Thanks to the area development during the fifteenth century, the viticulture's value in the region became more noticeable, especially in the suburban zones and on the Franciacorta hills. Further works on the vineyards were appreciated and, in 1570, the Italian physician Gerolamo Conforti wrote one of the first text called "Libellus de vino mordaci" concerning the technique of bottled-fermented wines and their effect on human body based on wines from Franciacorta territory. This studies not only preceded the intuitions of Dom Perignon about sparkling wines, but Conforti highlighted remarkable diffusion and highly consumption of sparkling wine in the area which stands as a proof of a deep connection between the territory and Franciacorta wine. Mentioned earlier, Gabriele Rosa in his treatise on wines in 1852 described Franciacorta white wines as excellent and graceful (Ministero delle Politiche Agricole Alimentari e Forestali, 2017).

A new era for Franciacorta wines began in the 1950s in Borgonato, where Guido Berlucchi initiated the production of a white wine called "Pinot del Castello". Occurred problems with wine stability contributed to the cooperation with the young oenologist Franco Ziliani who convinced Berlucchi to produce sparkling wines which could be compared to Champagne.

In 1961, the very first bottle of Franciacorta sparkling wine was produced, which Berlucchi called "Pinot di Franciacorta" and for the first time the toponym "Franciacorta" appeared on the wine label.

In 1967, a small group of producers created the first Organization that promoted the rise of the status of Controlled Designation of Origin (DOC), approved by a Presidential Decree. Pinot di Franciacorta DOC was made with the natural refermentation in the bottle based on Pinot Bianco grape variety and with the possibility of adding Pinot Grigio or Pinot Noir.

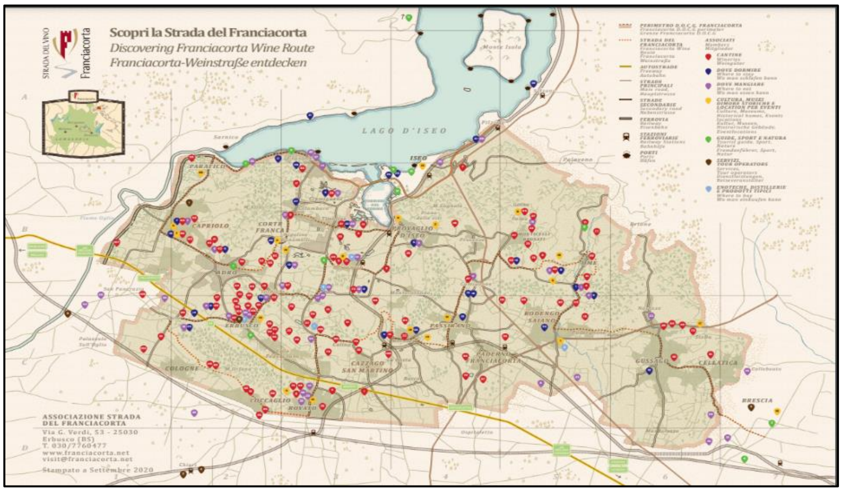
In 1983, the initial 50 hectares become 550 and the sales of Pinot di Franciacorta exceeded one million bottles. Within this period, Chardonnay grape variety was established along with Pinot Bianco and Pinot Nero as main grapes used to this wine production.

In 1990, the Consorzio per la tutela del Franciacorta was officially created with 29 producers involved and, after five years, the wine was recognized as DOCG. In 2021, Franciacorta DOCG included 383 operators with a production of 140.337 hectolitres of wine (Valoritalia, 2022). Within sixty years of wine production, this wine has achieved reputation of high-quality sparkling wine in Italy and, nowadays, it is gaining more and more recognition worldwide. Moreover, in 2021 after sixty years of Franciacorta production, 20 million bottles have been sold overall (The Franciacorta Consortium, 2022).

3.2 The Franciacorta area of production

The production area for Franciacorta DOCG wine (see Figure 5) is located in Brescia province and includes the following municipalities: Adro, Capriolo, Cortefranca, Cellatica, Erbusco, Gussago, Iseo, Monticelli Brusati, Ome, Paderno Franciacorta, Paratico, Passirano, Provaglio d'Iseo and Rodengo Saiano. Furthermore, municipalities of Coccaglio, Cologne, Cazzago S. Martino and Rovato are also included in the production area. Detailed boarders of production area are present in Appendix A.

Figure 5. Franciacorta area of production



Source: Consorzio per la tutela del Franciacorta, 2022.

3.3 Franciacorta wine – product specification

Franciacorta as a DOCG wine is subject to detailed regulations that define various stages of wine production – from the vineyard to the final product. The document is an effect of the producers' work over years with the goal to obtain a high-quality wine. Every year, before realising the product to the market, producers are checked by Control Body to assess the compliance with the production rules.

Producers of Franciacorta DOCG are obliged to proceed the vinification, bottling as well as packaging in the area of production, as explained in the 3.2 subsection.

Under the name of Franciacorta DOCG there could be wine styles authorized as Franciacorta, Franciacorta Satèn and Franciacorta Rosè, Franciacorta millesimato and Franciacorta riserva.

Franciacorta and Franciacorta Rosè can be made from Chardonnay, Pinot nero, Pinot bianco and Erbamat grape varieties, while Franciacorta Satèn is obtained only from two grape varieties, namely Chardonnay and Pinot bianco. Detailed information of grapes proportion, aging time, and the characteristics of wines production can be found in Table 3.

Table 3. Franciacorta types and production characteristics

	Franciacorta	**Franciacorta Vintage**	**Franciacorta Reserve**	**Franciacorta Rosé**	**Franciacorta Satèn**
Grape variety	Chardonnay Pinot Nero Pinot Bianco Erbamat	varieties according to the Franciacorta type	varieties according to the Franciacorta type	Chardonnay Pinot Nero Pinot Bianco Erbamat	Chardonnay Pinot Bianco
Minimum aging time [months]	18	30	60	24	24
Dosage	zero dosage extra brut brut extra dry sec demi-sec	zero dosage extra brut brut extra dry	zero dosage extra brut brut	zero dosage extra brut brut extra dry sec demi-sec	brut
Minimum alcoholic strength by volume [%]	11.50	11.50	11.50	11.50	11.50
Minimum total acidity [g/l]	5.00	5.00	5.00	5.00	5.00
Minimum non-reducing extract [g/l]	14.00	15.00	15.00	15.00	14.50
Maximum					

pressure in the bottle [atmospheres]	5-6	5-6	5-6	5-6	5

Source: Consorzio per la tutela del Franciacorta, 2022.

Vines are supposed to be planted on lands approved as suitable for DOCG wine production. In the case of Franciacorta, vineyards are not allowed to be located in the area of inadequately sunlit, valley beds nor near creeks, marshes, or rivers. Furthermore, to ensure the adequate sunlight expose to vines, vineyards cannot be planted above 550 m above sea level. Taking into consideration the vines training system, it is allowed to use vertical shoot positioning and espalier, and, in the case of terraces, it is permitted to use different training systems which at the same time do not negatively affect the grape quality. In the case of permitted grapes yield per hectare, the rules are defined in the Rulebook. Grapes are ready to be harvested from 1st of August until 10th of September, but it depends on the vintage. It is mandatory to harvest grapes by hand to preserve bunches integrity.

The vinification process starts with the direct press without grape bunches destemming. This requirement is executive in the case of Chardonnay, Pinot bianco and Erbamat grape varieties, but it does not apply for Pinot nero due to vinification process for Franciacorta Rosè wine. Grapes varieties are supposed to be pressed separately and the final must yield shall not go below 65 %. Base wine is used to prepare cuvées, which in spring are blended in tanks and first fermentation occurs. The next step is adding yeast and sugar to initiate the second fermentation. Taking into consideration the types of Franciacorta wine, lees ageing last from 18 till 60 months in the horizontal position. Then bottles are placed into the so-called pupitres, which help to settle the sediments in the bottles' neck: this step is called Remuage. In the next step, base wine of Franciacorta called *liqueur d'expédition* with sugar is added in the process of disgorging. Before realising the wine to the market, Franciacorta wine bottles receive a state stamp which guarantees the authenticity of quality and the origin.

3.4 Consorzio per la tutela del Franciacorta

The Consortium is an association of wine producers who are co-operating with each other for protection, enhancement and promotion of the terroir and its culture as a whole. The Consorzio per la tutela del Franciacorta was set up on the 5th of March in 1990 in Corte

Franca by 29 associated producers and with Paolo Rabotti as the President. Categories of winegrowers, winemakers and bottlers who are interested in the production chain of the Franciacorta DOCG, Curtefranca DOC and Sebino IGT designations are members of the Consortium. There are companies of various sizes: from small family-run companies to large, structured companies known throughout the world. The companies associated with the Franciacorta Consortium represent almost all those which are active in the area and are present on the market especially with the main product of this wine-growing area.

Throughout years, Presidents of the Consorzio were changing in 1993 Riccardo Ricci was heading the position, in 1999 Giovanni Cavalleri, the year later Claudio Faccoli took over the President function, in 2003 Ezio Maiolini was elected, in 2009 Maurizio Zanella was leading the Franciacorta Consorzio, after six years Vittorio Moretti as a new director and, from 2018 till now, Silvano Brescianini is President of Franciacorta (Consorzio per la tutela del Franciacorta, 2022).

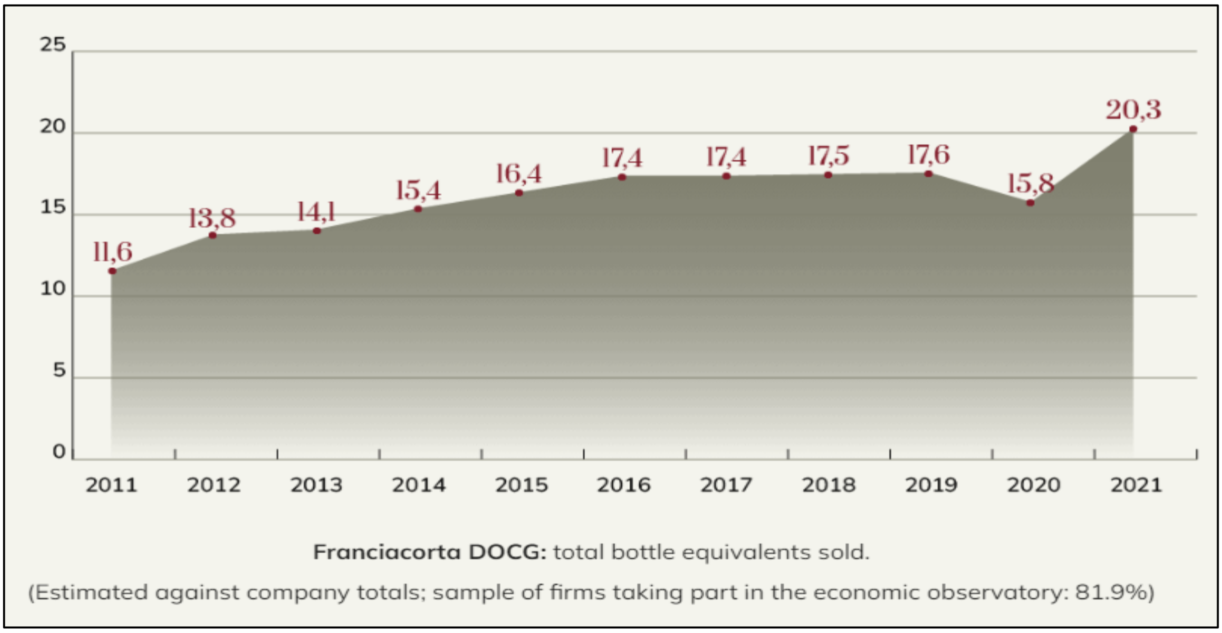
3.5 Control authority Valoritalia

Valoritalia is an Italian organization that controls and certificates wines with a Designation of Origin or Geographical Indication, vintage wines as well as for grapes variety indications. The company was founded in 2009, with the headquarter in Rome, under authority of the Ministry of Agricultural (Ministero dell'agricoltura, della sovranità alimentare e delle foreste - MASAF). Thanks to the collaboration with FederDOC (Confederazione Nazionale Consorzi Volontari Tutela Denominazioni Vini Italiani) and CSQA (i.e., another Italian control authority), Valoritalia is able to provide a high-level control system at every stage of the wine production, which guarantees wine quality to consumers. Franciacorta DOCG stays under the Control Authority Body Valoritalia. Via traceability system, consumers can insert the Series and the Number find on the excise seal of wine bottle and receive information about wines which were bottled from 23 January 2017 until today. Customer using traceability system can rely on the assurance knowing that it is supported by precise traceability and transparency. Furthermore, each year the Authority Body assesses the control plan approved earlier by MASAF, for each wine benefiting with the PDO status. These proceedings, in a further way, enhance the consumer awareness of the wine origin (Consorzio per la tutela del Franciacorta, 2022).

3.6 Franciacorta DOCG market

In 2011, Consorzio per la tutela del Franciacorta, as a first association body, provided statistical data gathered by its members, regarding wine distribution in the domestic market as well as at international level. In 2021, 81,9 % of firms belonging to Consortium participated in gathering data.

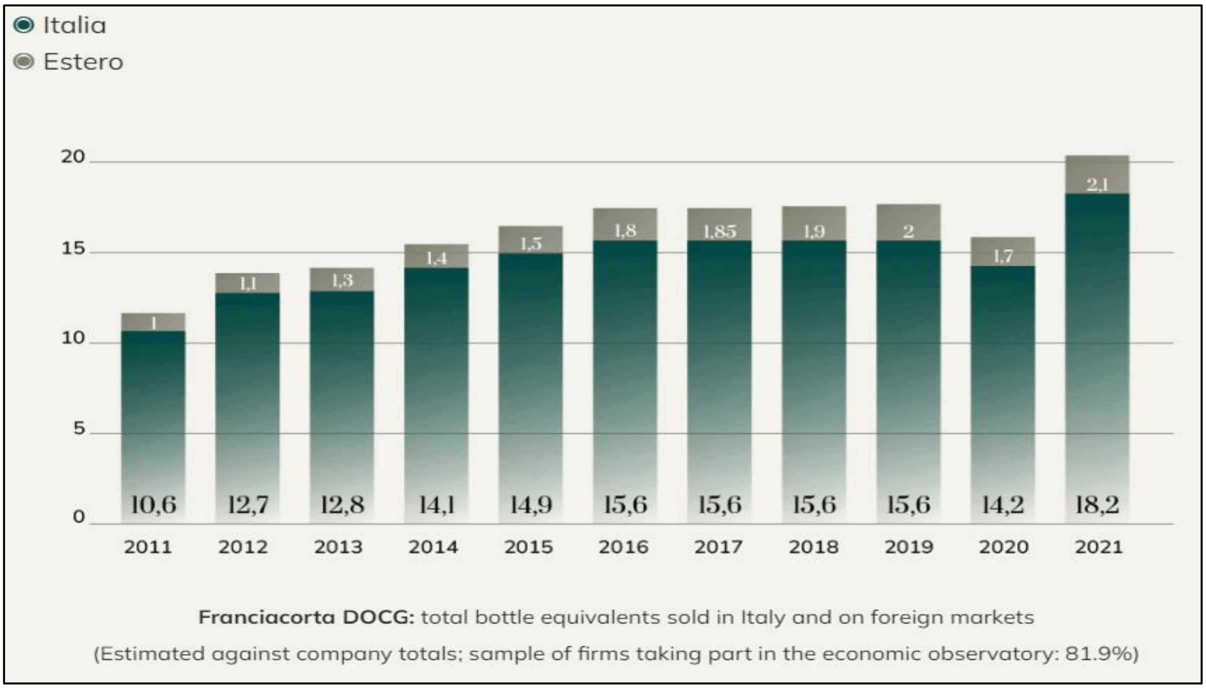
Figure 6. Franciacorta DOCG sales volume, measured in million 0.75 l bottles sold, 2021



Source: Franciacorta Economic Observatory, 2022.

As it can be seen in Figure 6, Franciacorta DOCG was characterised by an upward trend in sales until 2019. In 2020 wine sales recorded a decline in volume, which was caused by restrictions due to COVID-19 pandemic. The slowly coming back of the HORECA sector in 2021 showed immediately growth rate in sales' volumes. Comparing April and May in 2020 and 2021, sales by volumes of Franciacorta DOCG exceed around 200 % growth.

Figure 7. Sales in volume in Italy and abroad, measured in million 0.75 l bottles sold, 2021.

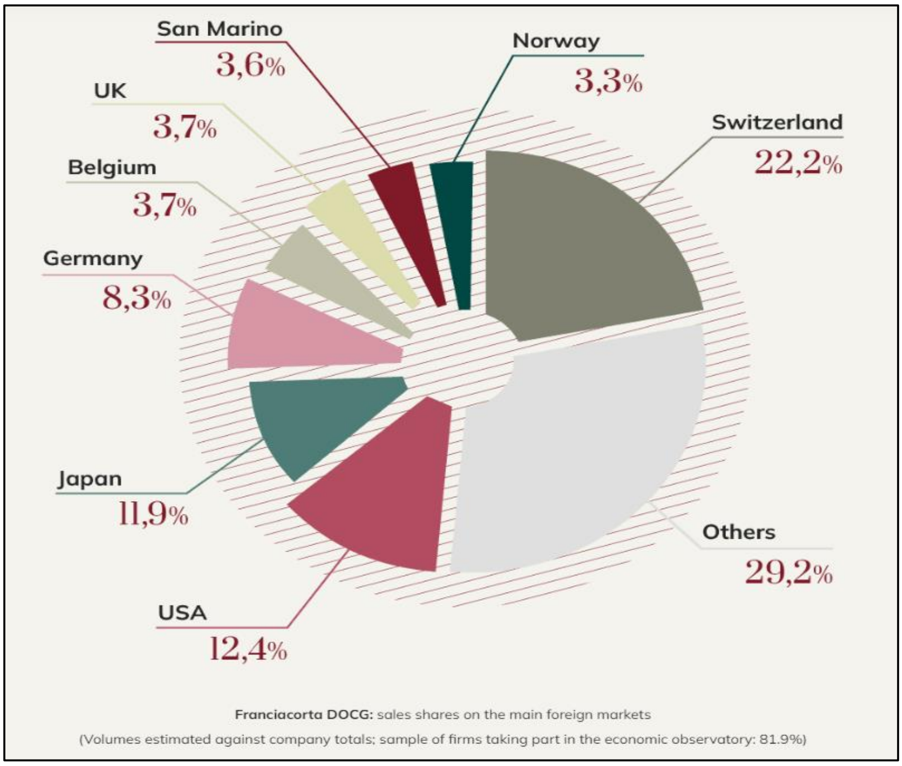


Source: Franciacorta Economic Observatory, 2022.

Based on Figure 7, it can be assumed that Franciacorta DOCG is sold mainly in Italy. Sales on the international market are still not well developed. According to the Franciacorta Economic Observatory (2022), in 2021 domestic sales volumes of Franciacorta DOCG stood for 89,7 %. Compared to 2020, there is a +28,4 % increase in sales and a growth of 16,8 % over 2019, when there were no external factors impacting on sales (e.g., COVID-19).

In 2021, 47,4 % of the Franciacorta DOCG sale turnover is accounted by north-west of Italy, with the Lombardy region being at the first position for sales (36,2 %). The rest part of the turnover was divided between regions in the north-east (21,7 %), the centre (18,5 %) and south (12,4 %). It has to be noted that, compared to 2020, growth in Franciacorta DOCG sales have been registered, especially in the south (+46,7 %), and lower in the north-east of Italy (+22,5 %).

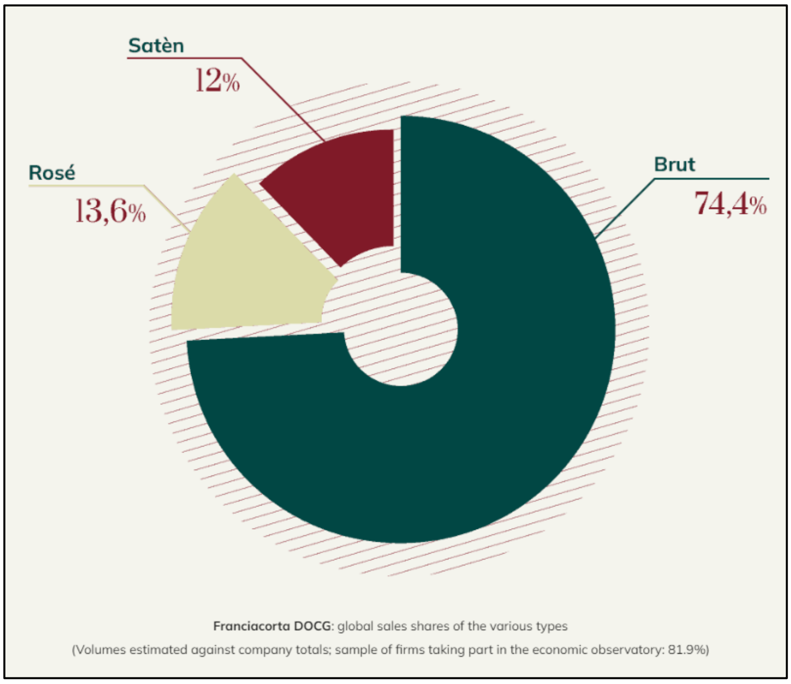
Figure 8. Franciacorta DOCG exports, 2021.



Source: Franciacorta Economic Observatory, 2022.

As shown in figure 8, Switzerland (22,2 %) stands as the main international wine market for Franciacorta DOCG, followed by the United States (12,4 %), Japan (11,9 %), and Germany (8,3 %).

Figure 9. Franciacorta DOCG sales by type, in volume, 2021



Source: Franciacorta Economic Observatory, 2022.

Figure 9 shows that the most frequently purchased type of Franciacorta DOCG in 2021 was brut (74,4 %), followed by rosé (13,6 %) and Satèn (12 %).

In 2019, the average price of Franciacorta DOCG bottle (whatever type) was 13,39 €, while in 2020 it decreased to 13,14 €. In 2021, the price exceeded 13,47 € (Consorzio per la tutela del Franciacorta, 2022).

4. Chapter 4.

The Polish wine market

Throughout the years, Poland has been mostly regarded as a country where vodka and beer stood as main alcohol choices. The entry into the European Union in 2004 left the door open for young Poles: after traveling abroad, they were coming back to Poland, with new culture and alcohol experiences. Over the years, there has been a development in the culture of wine drinking in Poland (Aswani, 2021).

The economy of Poland is one with the fastest growing among EU member states. The increasing annual growth of the gross domestic product (GDP), from 1.07 million US$ in 2016 to 1.44 million US$ in 2021 (increase by 34.58 % in five years) (Organization for Economic Cooperation and Development, 2023) and annual growth rate of GDP per capita equal to 7.3 % in 2021 (The World Bank 2023) contributed to set the Polish wine market at the 5th place among the most attractive markets worldwide (Wine Intelligence 2021). Although, due to increasing energy costs brought on by Russia's aggression against Ukraine and weaker domestic demand, real GDP growth is predicted to decelerate to 0.9 % in 2023 before picking up 2.4 % in 2024 (OECD, 2022). Furthermore, as a result of the developing wine-drinking culture (Wanat, 2022), Poland takes the 17th place worldwide as one of the biggest importers in Central-Eastern Europe, (Country Report OIV, 2021).

Moreover, Poland is one of the few wine markets in Europe where traditional Old-World markets do not predominate overall despite its heavy reliance for imports. Wines from Old World do not dominate the market. Hungarian, Georgian, and Moldovan wines are quite popular on Polish market, due to historical connection of Poland with Eastern European wines. Other well-known and popular wine regions include Chile or the US. Poles are interested most in recognisable brands, especially when on-premises sale is coming back after the pandemic period (Aswani, 2021).

As reported by Wójcik (2022), 296,5 million liters of wine were sold in 2021 in Poland. Growing wine drinking culture is related to lifestyle changes, higher incomes, and a greater propensity to buy luxury goods. It has been forecasted that wine consumption in Poland will increase by 24 % and will achieve around 345 million liters of wine until 2025. After COVID-19, on-trade wine sales will come back to previous level not sooner than in 2024.

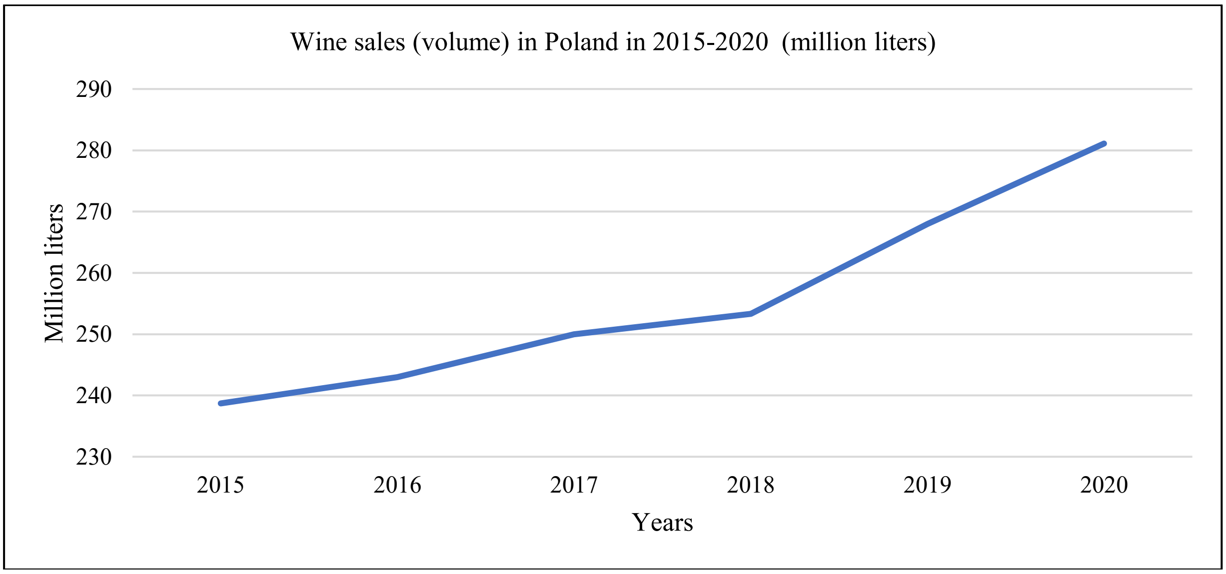
4.1 Wine consumption in Poland

Wine consumption in Poland is not so culturally entrenched such as beer or spirits drinking. However, increasing wine sales both in volume and value make wine as a more and more popular drink on the Polish market. The amount of wine drunk by Poles per year (including meads) is 6,4 liters in 2020, which is much less than the average in Europe. For comparison, in Portugal people annually drink 51,9 liters of wine per capita, in Italy 46 liters and in France 46,6 liters.

Poles choose foreign wines most frequently. Among these, the most popular brands include Carlo Rossi, Fresco, Martini, Mogen David, and Dorato. The share of domestic alcoholic beverages in Poland amounts to 0,5 % of the total wine consumption. Poles most frequently consume wine during free time and meetings while socializing and eating. On average, the amount of wine drunk at one time is four glasses (Wójcik, 2022). In 2021, Poles were set on 27th place as wine consumers in the worldwide statistics (Country Statistics OIV, 2021).

Wójcik (2022) analyses data from the Euromonitor report "*Wine in Poland*" from 2021, showing volumes and values of wine sale in Poland from 2015-2020.

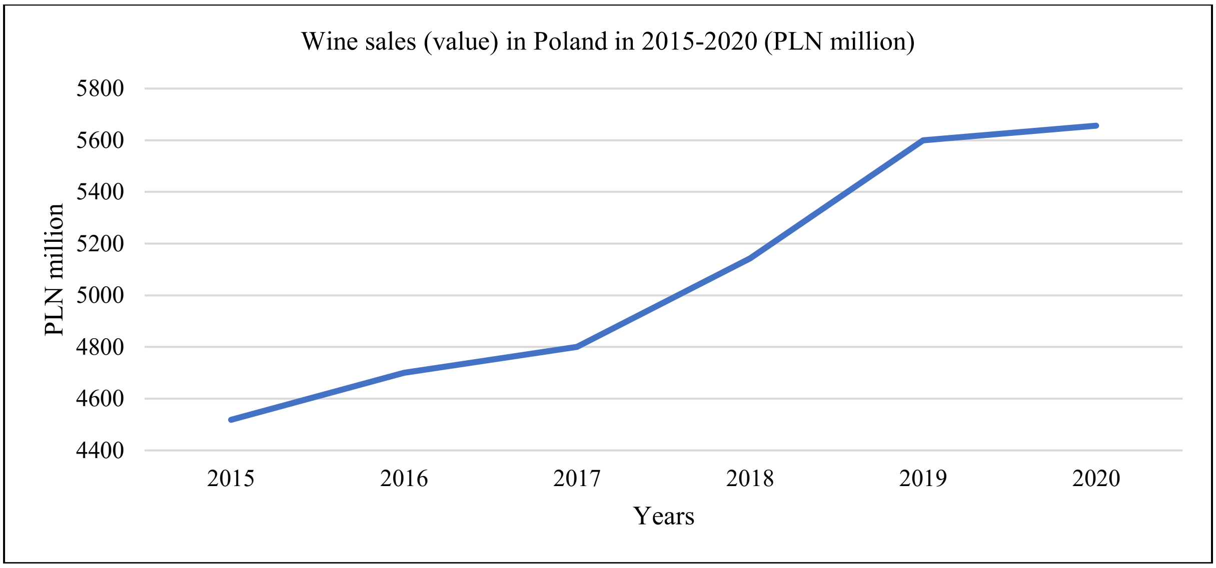
Figure 10. Wine sales in Poland in 2015-2020.



Source: data compilation from Euromonitor report "Wine in Poland" developed by Wójcik, A. in "Changes on the wine market in Poland", 2022.

As it is presented in Figure 10, in 2015 wine sales in Poland amounted to 238,7 million liters and to 281,1 million liters in 2020 (+17.8 %). As shown in Figure 7, the value of wine sales in Poland also increased significantly. From PLN 4518,3 million in 2015 to PLN 5656,3 million in 2020 (+ 25.2 %).

Figure 11. The value of wine sales in Poland in 2015-2020



Source: data compilation from Euromonitor report "Wine in Poland" developed by Wójcik, A. in "Changes on the wine market in Poland", 2022.

The price of a wine bottle is a major factor considered by consumers while buying it. However, the trend of wine consumption in Poland is changing. Nowadays, Poles are willing to spend more on quality wine rather than purchasing budget wines (Aswani, 2021).

Poles are most likely to purchase red wines (Wójcik, 2022). The most desirable wine style is dry. It is a change, over the years, where the sweet ones were preferred. Poles are mainly interested in varietal wines such as Riesling or Zinfandel (Wanat, 2022). Most Polish consumers spend on wine from PLN 12,10 (2,50 €) to PLN 18,59 (4 €). Wines above PLN 33,30 are chosen by 6 % of Poles (Wójcik, 2022).

Sparkling wine consumption in Poland also increased over 2021 (Ptak, 2022). Despite the period of pandemic where wine availability via on-trade channels were limited, sales of bubbles increased (+ 15 % in volume and + 17 % in value). 40 % of chosen sparkling wines by Poles stand for Prosecco (Siwiec, 2022).

4.2 Profile of Polish wine consumers

Nowadays, the profile of Polish wine consumer is similar to Northern European consumer: we find open-minded travellers with an above average income and living in big cities. Statistically, there are more women-wine drinkers than men (Siwiec, 2022). The average age of Polish wine consumer is 25-34 years (Wanat, 2022).

Based on an analysis of the literature and data related to sales and wine consumption in Poland, Wójcik (2022) identified six profiles of Polish wine consumers:

1) *Connoisseur*, namely a passionate consumer and knowledgeable about wine. He/she is able to distinguish different varietals and comprehends the labels on the bottles. For connoisseurs, taste is the main cue while choosing wine. The price does not play a big role. This consumer most frequently buys wines in specialized stores and selects vintage wines.

2) *Wine lover*. In turn, he/she is less familiar with wine than the previous group. Most important values while drinking wine are wine flavour and rituals. He/she is often guided by the product origin and experts' recommendations. He/she consumes large amounts of wine by treating this activity as a hobby.

3) *Experimenter*. He/she is characterized by a high frequency of wine drinking as well. He/she does not pay much attention to the origin or the graphic design of the label. He/she is eager to try new flavours, both from the lower and higher price range by comparing their values. When choosing wine, he/she follows his own intuition, without much attention to the other recommendations.

4) *Novice*. He/she does not have much experience with wine. He/she is young and has relatively low knowledge about wine. His/her purchasing decisions are influenced by others. The wines he/she chooses are characterized by low price and standout bottle label.

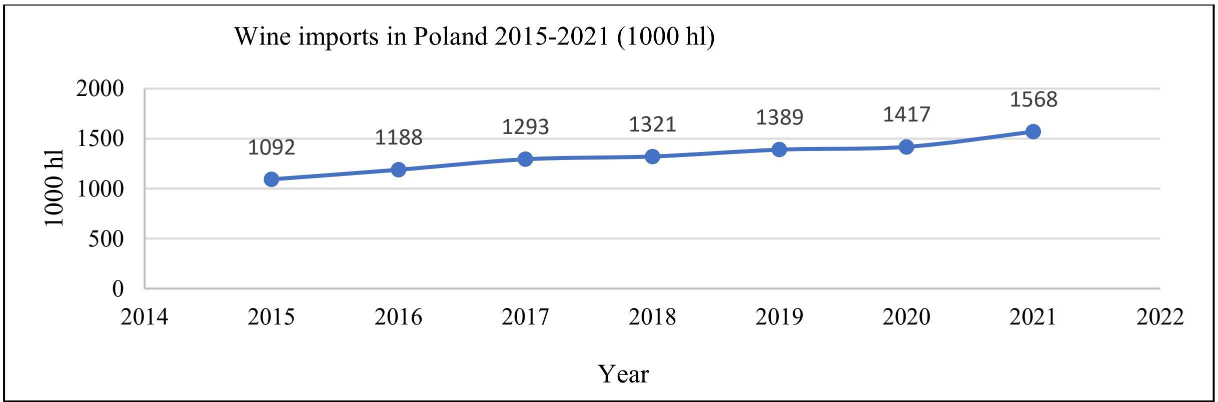
5) *Occasional drinker*. He/she is a consumer who drinks wine only during social gatherings, events or while celebrating. He/she does not pay much attention to wine characteristics. First and foremost, the occasion stands for most important reason for wine drinking.

6) *Regular drinker*. He/she often consumes wine, choosing products that have a relatively low price and have been tested by him/her. Wine usually accompanies him/her during spending free time and is associated with enjoyment and as an inseparable element of rest and relaxation.

4.3 Wine import

The Polish wine market is classified as non-traditional. Despite its continuous development, wine production in Poland is still negligible. That is why most wines have to be imported to meet the demand of Polish wine consumers (Centre for the Promotion of Imports from developing countries, 2016).

Figure 12. Wine imports in Poland 2015-2021 (1000 hl)



Source: OIV database, 2022.

As it is reported in the Figure 12, wine import in Poland increases with the years. Within seven years (2015-2021), wine import increased almost + 43.6 %.

Table 4. Domestic versus imported sparkling wine market in Poland - share by volume (thousands of 9 litre cases) in 2016-2020 and percentage of market share.

Sparkling wine	Thousands of 9 litre cases					
	2016	**2017**	**2018**	**2019**	**2020**	**Market share**
Domestic	2.753	2.699	2.607	2.656	2.671	64 %
Imported	833	881	1.113	1.441	1.506	36 %

Source: Wine Intelligence. Poland wine landscapes, 2021.

As shown in Table 4, in 2020 the market share of domestic sparkling wines in Poland was 64 %, and 36 % the import. What is important to notice, 80.79 % more sparkling wines were imported in 2020, compared to 2016. Whereas the share of domestic sparkling wines in 2020 decreased by 2.98 %, compared to 2016.

Table 5. Imported sparkling wines by country of origin in Poland - share by volume (thousands of 9 litre cases) in 2016-2020 and percentage of market share by country of wine origin.

Country	Thousands of 9 litre cases					
	2016	**2017**	**2018**	**2019**	**2020**	**Market share**
Italian	588	630	854	1.155	1.213	29 %
Spanish	90	96	106	117	127	3 %
French	65	71	74	78	78	2 %
Latvian	23	25	27	29	30	1 %
German	36	30	27	24	21	1 %

Source: Wine Intelligence. Poland wine landscapes, 2021.

Sparkling wines from Italy and Spain are popular, due to the number of wine variants available and the affordable price level which the Polish consumer is willing to pay. Moreover, these countries are most frequently chosen as a holiday destination and, as Nowak (2019) highlighted, Polish consumers are more likely reaching for wine tried on vacation and already known. In 2020, Italy was the largest exporter of wine to Poland (see table 5), accounting for 29 % of the country's market share of imported wine (Wine Intelligence, 2021).

Table 6. Imported sparkling wines in Poland (2017-2021) – volume in liters.

Product	Volume in liters				
	ITALY				
	2017	**2018**	**2019**	**2020**	**2021**
Prosecco, with PDO	1 987 866	2 230 646	4 429 403	5 553 462	8 843 622
Asti spumante, with PDO	920 739	1 053 466	1 127 707	1 226 630	2 018 781
	SPAIN				
Cava, with PDO	294 541	441 171	861 265	679 645	1 245 169
	FRANCE				
Champagne, with PDO	345 040	303 137	372 140	367 489	496 838

Source: Eurostat. International trade in goods, 2023.

As reported by Eurostat (2023), Prosecco and Asti, were the main premium sparkling wines imported to Poland in 2021 in terms of volume. Additionally, the volume of both wines that were imported saw a significant increase within five years (Prosecco, with PDO increased by 3.45 %, Asti, with PDO increased by 1.19 %, compared to 2017). In terms of volume, Cava, with PDO was the second premium sparkling wine most likely imported to Poland in 2021. Furthermore, in 2021 around 3.23 % more Cava, with PDO was imported than in 2017. Import of Champagne in 2021 has increased during the past five years (increased by 44 %), although not by as much as the Prosecco, Asti, or Cava. The import of sparkling wines made from fresh grapes with PDO from all three countries to Poland is on the decline. Well-known premium sparkling wines are more likely to be imported into Polish wine market (Table 6).

Table 7. Imported sparkling wines in Poland (2017-2021) – value in euros.

Product	**Value in euros**				
	ITALY				
	2017	**2018**	**2019**	**2020**	**2021**
Prosecco, with PDO	8 343 337	9 790 371	17 188 117	19 842 818	30 226 526
Asti spumante, with PDO	4 464 788	5 007 969	5 295 663	5 221 619	8 374 872
	SPAIN				
Cava, with PDO	818 384	1 237 938	2 384 515	1 858 068	3 228 916
	FRANCE				
Champagne, with PDO	7 283 073	6 362 443	8 087 756	7 496 363	10 466 204

Source: Eurostat. International trade in goods, 2023.

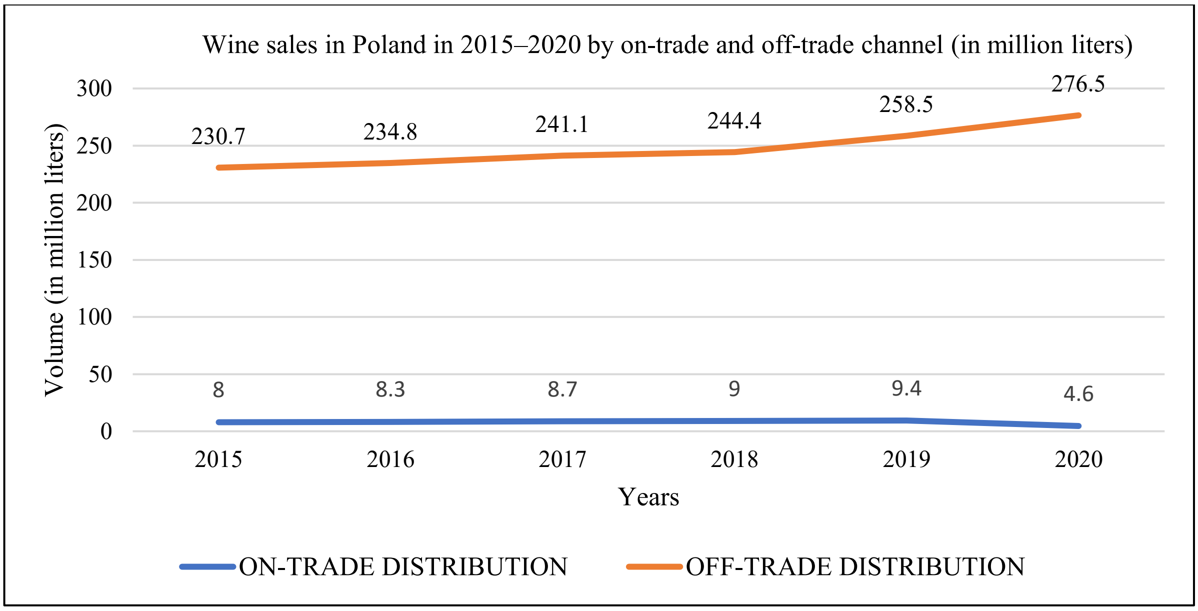
In 2021, Prosecco, with PDO scored highest value among imported sparkling wine (Table 7). Although considering the volume to value ratio of imported sparkling wines, Table 6 shows that in 2021, 496 838 litres of imported Champagne were valued 10 466 204 € (1 l of imported Champagne cost 21 €). In, 2021, 8 843 622 liters of imported Prosecco were valued at 30 226 526 €, which is over 18 times higher than the volume of imported Champagne (1 l of imported Prosecco, with PDO cost 3,4 €). In 2021, 1 l of imported Cava was worth 2.59 €.

Zielińska (2019), the President of the Association of Employers of Polish Wine Council, pointed out the Polish wine market specificity. Wines from Australia or South Africa are not the most popular in Poland, while worldwide these are considered among the main wine exporters. Bulgaria and Moldova seem interesting wine origins for Poles, even though countries are not well known at the international level.

4.4 Wine trade system in Poland

The wine trade system in Poland is under the control of various authorities such as: Trade Inspectorate, Commercial Quality of Agricultural, Food Products Inspectorate, Sanitary Inspectorate. Both on-trade (to restaurants, pubs, cafes, hotels, clubs, and discos) and off-trade (discount stores, supermarkets, hypermarkets, liquor stores, internet stores and gas stations) distribution channels showed similar progression until 2020, when there was a significant drop in on-trade sales due to the COVID-19 pandemic (Wójcik, 2022) (figure 13).

Figure 13. Wine sales in Poland in 2015–2020 by on-trade and off-trade channel (in million liters)



Source: Wójcik, A. Changes on the wine market in Poland, 2022.

4.4.1 On-trade distribution

The on-trade channel is characterized by a steady increase in wine sales until 2019. In 2015, the volume of sold wines set to 8 million liters, worth PLN 620 million (132 million €). In 2019, sales contributed to 9.4 million liters, worth PLN 749.7 million (159 million €). However, as it can be observed in Figure 9, due to pandemic time, in 2020 there was a decrease of more than half in sales compared to 2019, as the v Volume of wine sold was 4.6 million liters (PLN 383.5 million / 81.5 million €) (Wójcik, 2022).

4.4.2 Off-trade distribution

In 2015, wine sales via off-trade distribution amounted to 230.7 million liters worth PLN 3898.3 million (828 million €). Five years later, in 2020, 276.5 million liters of wine were sold which stand for PLN 5272.8 million in value (Wójcik, 2022), which made the off-trade channel responsible for 84 % of revenue in the Polish wine market. However, according to Statista Consumer Market Outlook, this will decrease to 81 % by 2025 (Statista Research Department, 2022).

4.5 Rules and regulations of alcohol consumption

According to Article 15 from the Act of October 26th, 1982, on Upbringing in Sobriety and Counteracting Alcoholism (2001):

"It is prohibited to sell and serve alcoholic beverages:

1) to individuals whose behaviour indicates that they are under the influence of alcohol;

2) to persons under the age of 18;

3) on credit or in pledge".

In the case of advertising and wine promotion, Article 13.1 reports: *"It is prohibited to advertise and promote alcoholic beverages in Poland, except for advertising and promoting beer."*

5. Chapter 5.

Exploring the position of Franciacorta DOCG and premium sparkling wines on the Polish wine market and future market development opportunities: research aim, data, and methodology

5.1 Research aim

This research was performed to evaluate the position of Franciacorta DOCG Italian sparkling wine on the Polish wine market. Even though Poland is classified as non-traditional country in the case of wine drinking, at the same time there is great opportunity for developing market of premium segment wine, which knowledgeable Polish consumer search more and more frequently (Schaefer *et al*., 2018).

To achieve the aim, research was conducted via two questionnaires: first for Polish sparkling wine consumers and second for the professionals working in the Polish wine industry.

Next, collected answers were used to perform the strengths, weaknesses, opportunities, and threats (SWOT) analysis. Based on results, threats, opportunities, weaknesses, and strengths (TOWS) analysis was carried out and finally, strategic approach was deducted for Franciacorta DOCG on Polish wine market.

Data collection was made between September – December 2022. Most of the participants were from Cracow city.

5.2 Data collection

The Google Forms online template was used to create surveys. Both questionnaires were conducted in Polish language, and both were shared via social media (Facebook, Instagram) and via e-mail. There was also opportunity to fulfil online surveys in wine bar located in Cracow, via electronical tablet.

- *Questionnaire for consumers*

The survey consisted of open and closed questions and seven-points Likert scale (1=totally disagree, 7=totally agree), for instance to measure wine involvement of Polish consumer. All involvement statements were adopted from Mittal and Lee (1989) scale. The questionnaire was fulfilled by 152 respondents.

Polish wine consumers (individuals drinking sparkling wine at least once a month), were asked to fill up the questionnaire (Appendices B), which was divided into three sections.

First, socio-demographic questions were asked, aiming to find out more about participants. Secondly, wine drinking preferences were examined (how frequently, where and which wine consumers are most likely to drink). In the last section, questions on Franciacorta DOCG were presented.

- *Questionnaire for professionals in the Polish wine industry*

Professionals from wine industry, were asked to fill up the questionnaire (Appendices C), which was divided into four parts. First socio-demographic questions were asked to find out more about participants. Secondly, professionals were asked to answer questions about Polish wine consumer preferences for premium sparkling wine consumption. Next, respondents were asked to define Polish wine consumer preferences for Franciacorta DOCG. In the final part, based on their own opinions about both Franciacorta DOCG and premium sparkling wines, they were asked about the position of these wines on the Polish market.

5.3 SWOT analysis

A strengths, weaknesses, opportunities, and threats (SWOT) analysis is a well-known methodology to provide information for firms about their market position (Li & Bardaji, 2017).

Each market is under the action of internal and external powers, which can provide the further development or act as a limitation to achieve intended business goals. Due to the fact, that forces are not permanent and can change according to the environment, the market has to define strategic factors, which can stand as a departure point, while implementing suitable actions each time. To achieve success, strengths, and weaknesses (internal forces), opportunities and threats (external forces) have to be recognised (Houben *et al*., 1999).

In this study, results from the two questionnaires, which gathered information from Polish consumer and Polish professionals working in wine industry, were used for conducting SWOT analysis. It was needed to understand position of premium sparkling wines and Franciacorta DOCG on Polish wine market and how to improve it. Internal factors for Franciacorta DOCG showed its strengths and weaknesses, while external factors its opportunities and threats for the Polish wine market.

5.4 TOWS matrix

According to Ravanavar *et al*. (2012), SWOT analysis without extension to the TOWS matrix, becomes a useless methodological tool. TOWS matrix (Weihrich, 1982) has been developed to provide alternative strategies, based on internal and external factors defined in the SWOT analysis. TOWS matrix represents a strategic framework that matches threats and opportunities with weaknesses and strengths, and systematically identifies relationships between these factors and strategies.

As can be seen in the Table 8, TOWS matrix provides four strategies that the firms can implement, based on information from the SWOT analysis.

- The Strengths-Opportunities (SO) strategy – Strategy attempts to *"maximize both strengths and opportunities"*.
- The Strength-Threats (ST) strategy – *"Strategy is based on the strengths of the organization that can deal with threats in the environment"*.
- The Weaknesses-Opportunities (WO) strategy – "*Strategy attempts to minimize the weaknesses and maximize the opportunities*".
- The Weaknesses-Threats (WT) strategy – Strategy attempts to *"minimize both weaknesses and threats"*.

Table 8. TOWS matrix

	Strengths	**Weaknesses**
Opportunities	Strengths – Opportunities strategies (Maxi-Maxi)	Weaknesses – Opportunities strategies (Mini-Maxi)
Threats	Strengths – Threats strategies (Maxi-Mini)	Weaknesses – Threats strategies (Mini-Mini)

Source: Weihrich, H. 1982.

Performed SWOT analysis on premium sparkling wines and Franciacorta DOCG was the base to create TOWS matrix. Four strategies are provided to support the development of Franciacorta DOCG on Polish wine market.

5.5 Samples' description

5.5.1 Description of the consumers' sample

Before taking part into the questionnaire consumers were informed that research was performed only for participant who consume sparkling wine at least once a month. It was necessary, to avoid occasional wine drinkers, who do not have much in common with wine, especially sparkling wine, and whose answers could be misleading for the research. Second requirement for consumers was to be over 18 years old, which in Poland is considered the legal age for alcohol consumption. Table 9 shows the characteristics of the sample.

Table 9. Socio-demographic characteristics of Polish consumers

Variable	N	Percentage
Agreement to participate		
I do agree	152	100.00
I do not agree	0	0.00
Gender		
Female	87	57.24
Male	65	42.76
Age		
18-25 years old	45	29.61
26-34 years old	59	38.82
35-49 years old	38	25.00
50-64 years old	9	5.92
Over 65 years old	1	0.66
Residence location		
Cracow	101	66.45
Warsaw	20	13.16
Wroclaw	5	3.29
Katowice	2	1.32
Other	24	16.00
Education		
Primary school	0	0.00
Secondary school	0	0.00
High school	23	15.13
University	127	83.55
Post-graduate education	2	1.32
Household income		
Below PLN 3.000 (below 637 €)	12	7.89
PLN 3.001 - 5.000 (637-1.062 €)	44	28.95
PLN 5.000 -10.000 (1.062-2.124 €)	61	40.13
PLN 10.001 - 20.000 (2.124-4.247 €)	18	11.84
Above PLN 20.000 (Above 4.247 €)	4	2.63
Prefer not to say	13	8.55

Source: Own elaboration. Concluded on total sample (152), 2022.

152 Polish wine consumers were taking part in the research. All of them agreed to participated in the questionnaire (100.00 %). 57 % of the interviewees are women, followed by 43 % men. This result confirms what has already been reported in the literature, that in Poland there are more women-wine drinkers than men (Siwiec, 2022). The most representative segment of our sample of wine consumers (68.43 %) are below 35 years old and as reported by Wanat (2022), the average age of Polish consumer is 25 – 34 years old. 25.00 % represents consumers which are between 35-49 years old and 6.58 % is represented by consumers who are over 50 years old. With respect to residence location, the participants mainly come from Cracow (66.45 %) and Warsaw (13.16 %), followed by consumers from

Wroclaw (3.29 %) and Katowice (1.32 %). Within other locations (16 %) single cities were mentioned such as: Alwernia, Biała Podlaska, Gdańsk, Gdynia, Gorzów Wielkoposki, Limanowa, Lublin, Piotrków, Płock, Poznań, Słopnice, Tarnowskie Góry, Toruń, Trójmiasto. Most of Polish consumers have a university degree (83.55 %), 15.13 % of them finished the high school and 1.32 % have post-graduate education. PLN 5.000-10.000 (1.062-2.124 €) is the average household income for 40.13 % of consumers. 28.95 % of consumers earn PLN 3.001 - 5.000 (637-1.062 €) monthly, followed by 11.84 % consumers with the average income of PLN 10.001 - 20.000 (2.124-4.247 €), 7.89 % whose income is below PLN 3.000 (below 637 €) ending with minorities whose average income is above PLN 20.000 (Above 4.247 €). 8.55 % of consumer prefer not to mention about their income. As it is mentioned in the literature, the higher the consumers' education and income is, the more frequently wine is purchased or consumed (Siwiec, 2022).

Table 10. Consumption habits of Polish consumers

Variable	N	Percentage
Frequency of sparkling wine consumption		
Once a month	62	40.79
2-3 times a month	56	36.84
Once a week	22	14.47
2-3 times a week	10	6.58
Everyday	2	1.32
Frequency of sparkling wine purchasing		
Once a month	90	59.21
2-3 times a month	49	32.24
Once a week	10	6.58
2-3 times a week	3	1.97
Everyday	0	0.00
Place of sparkling wine purchase		
Supermarket (Biedronka, Lidl, Auchan)	44	28.95
Grocery stores (Żabka)	10	6.58
Speciality shops (enoteca)	42	27.63
Restaurants, wine bars	43	28.29
Internet	8	5.26
Other	5	3.29
Average price paid for bottle of sparkling wine (0,75l)		
Below PLN 50 (below 10 €)	50	32.89
PLN 51 - 100 (10-21 €)	61	40.13
PLN 101 - 200 (21-42 €)	26	17.11
PLN 201-300 (42-64 €)	11	7.24
PLN 301-400 (64-85 €)	2	1.32
PLN 401-500 (85-106 €)	1	0.66
Above PLN 500 (above 106 €)	1	0.66

Type of sparkling wine mostly purchased		
Prosecco	49	32.24
Cava	42	27.63
Champagne	20	13.16
Cremant	15	9.87
Lambrusco	4	2.63
Franciacorta	2	1.32
Sekt	1	0.66
Asti	14	9.21
Trento	0	0.00
Other	5	3.29
Degree of wine dryness mostly chosen		
Brut	83	54.61
Extra-dry	16	10.53
Dry	29	19.08
Demi-sec	11	7.24
Sweet	13	8.55

Source: Own elaboration. Concluded on total sample (152), 2022.

The majority of consumers drink sparkling wine once (40.79 %) or 2-3 times a month (36.84 %), followed by those who drink wine once (14.47 %) or 2-3 times a week (6.58 %). Only 1.32 % of consumers declare a daily wine consumption. In the case of frequency of sparkling wine purchase, the vast majority of consumers buy sparkling wine once (59.21 %) or 2-3 times a month (32.24 %). Only 8.55 % declare to buy wine once (6.58) or 2-3 times a week (1.97). No one declare to purchase sparkling wine every day. There are three major wine purchasing places: supermarkets (28.95 %), restaurants and wine bars (28.29 %) and speciality shops (27.63 %). Then, consumers are likely to buy wines in grocery stores (6.58 %) and via Internet (5.26 %). 3.29 % of respondents purchase sparkling wines from own import or buy directly from wine producer. Most part of consumers (73.02 %) report they spend, for a bottle of sparkling wine (0.75 l), below PLN 100 (21 €), while in the PLN 201-300 (42-64 €) price range, 7.24 % consumers declare its purchasing. Only 2.64 % of respondents spend for sparkling wine from PLN 301 to above PLN 500 (from 64 € to above 106 €). The average price for a bottle of sparkling wine (0.75l) is PLN 104.48 (22 €) (104 respondents, standard deviation 82.25). The growing value of GDP per capita in Poland from 1.07 million US$ in 2016 to 1.44 million US$ in 2021 (Organization for Economic Cooperation and Development, 2023) influences not only the choices of alcohol' type purchase but also the value, which consumers pay for purchased goods. As mentioned by Aswani (2021), Poles are more and more likely to spend more on quality wines.

Prosecco (32.24 %) and Cava (27.63 %) are the most frequently purchased sparkling wines. According to literature Prosecco stands for 40 % of all chosen sparkling wines by Poles (Siwiec, 2022), followed by French sparkling wines like Champagne (13.16 %) and Crémant (9.87 %) and Italian sparkling wines as Asti (9.21 %), Lambrusco (2.63 %), Franciacorta (1.32 %), Trento (0.00 %). 3.29 % of consumers declare to buy Polish sparkling wines, e.g., Pet-Nat or Corpinnat.

Last but not least, interviewers were asked to indicate the level of wine dryness, that has been mostly chosen by them. More than half (54.61 %) of consumers prefer brut wine, followed by consumers whose preferences are dry (19.08 %) and extra-dry (10.53 %) wine. Sweet wines are chosen by 8.55 % consumers and demi-sec by 7.24 % of consumers.

Table 11. Consumers' wine involvement scale (1- strongly disagree; 7 - strongly agree).

Variables	N	Mean
I have a strong interest in wine	152	4.76
Wine is very important to me	152	4.83
For me, wine do matter	152	4.93
I would choose my wine very carefully	152	4.84
Deciding which wine to buy would be an important decision for me	152	5.02
Which wine I buy matters to me a lot	152	5.08

Source: Own elaboration. Concluded on total sample (152), 2022. Mean of wine involvement scale = 4.91, Cronbach's alpha = 0.973.

According to results from Table 11, consumers' wine involvement may be regarded as high. Results have a mean rating of 4.91 and Cronbach's alpha equal to 0.973, which stands for high internal consistency of the scale.

5.5.2 Description of the Professionals' sample.

Furthermore, 107 Polish wine Professionals were taking part in the research (Table 12).

Table 12. Socio-demographic characteristics of Polish Professionals from the wine industry.

Variable	N	Percentage
Agreement to participation		
I do agree	107	100.00
I do not agree	0	0.00
Gender		
Female	36	33.64
Male	71	66.36
Age		
18-25 years old	6	5.61
26-34 years old	53	49.53
35-49 years old	44	41.12
50-64 years old	4	3.74
Over 65 years old	0	0.00
Residence location		
Cracow	95	88.79
Warsaw	4	3.74
Wroclaw	1	0.93
Katowice	0	0.00
Other	7	6.54
Education		
Primary school	0	0.00
Secondary school	0	0.00
High school	2	1.87
University	104	97.20
Post-graduate education	1	0.93
Household income		
Below PLN 3.000 (below 637 €)	0	0.00
PLN 3.001 - 5.000 (637-1.062 €)	13	12.15
PLN 5.000 -10.000 (1.062-2.124 €)	78	72.90
PLN 10.001 - 20.000 (2.124-4.247 €)	13	12.15
Above PLN 20.000 (Above 4.247 €)	0	0.00
Prefer not to say	3	2.80
Industry tier		
Restaurant, hotel, or hospitality industry	26	24.30
Wine retailer, retail sales, administration, or related field	40	37.38
Wine media, educator, academic or related field	0	0.00
Distributor, wholesaler, broker, or related field	11	10.28
Wine importer (or working directly for a wine importer)	16	14.95
Company that both imports and distributes wine	14	13.08

Source: Own elaboration. Concluded on total sample (107). 2022.

All of them agreed to participate in the questionnaire (100.00 %). 33.64 % of the interviewees are women, followed by 66.36 % men. This result shows a relevant difference between two questioned groups – Consumers and Professionals. Even if women drink wine more frequently, men dominate Polish wine industry. The most representative segment of Professionals is between 26-49 years old (90.65 %), followed by 18-25 years old (5.61 %) and 50-64 years old (3.74 %). There is no Professional who has over 65 years old. With respect to the residence location, the Professionals are from Cracow (88.79 %), while Warsaw (3.74 %) stands for the second city which respondents come from, followed by Wroclaw (0.93%). No one is from Katowice (0.00 %). Within other locations (6.54 %) single cities were mentioned such as: Poznań, Gliwice, Gorzów Wielkopolski, Łódź, and Gdynia. Almost all Professionals graduate University (97.20 %), 1.87 % of them finished only high school and 0.93 % have post-graduate education. PLN 5.000-10.000 (1.062-2.124 €) is the average household income for 72.90 % of Professionals. 12.15 % of respondents earn PLN 3.001 - 5.000 (637-1.062 €) and PLN 10.001 - 20.000 (2.124-4.247 €) monthly. No one declare an income below PLN 3.000 (below 637 €) or above PLN 20.000 (Above 4.247 €). 2.80 % of Professionals prefer not to mention about their income. 37.38 % of Professionals belong to wine retailer, retail sales, administration, or related field group, followed by restaurant, hotel, or hospitality industry group (24.30 %), wine importers (14.95 %), respondents who work in company that both imports and distributes wine (13.08 %) and distributor, wholesaler, broker, or related field group (10.28 %). There are no Professionals between respondents who work as wine media, educator, academic or related field.

6. Chapter 6.

Results and discussions

6.1 Survey on Polish consumers: focus on Franciacorta DOCG

The survey contained a few questions, which gathered answered from less than 152 participants. It is driven by fact that consumers were moved to question depending on the previous answer. Detailed information is reported below in tables and graphs.

Based on consumers' answers SWOT analysis was performed (Table 13).

Table 13. SWOT analysis. Polish consumers point of view about Franciacorta DOCG.

Strengths	**Weaknesses**
➢ Half of consumers know and tried Franciacorta DOCG and they appreciate its sensory and organoleptic characteristics ➢ Price of Franciacorta DOCG for Polish consumer is correct and convenient ➢ Franciacorta DOCG is good for a gifts or special occasion	➢ Difficult to find/buy Franciacorta DOCG in Poland and to access information about it ➢ Lack of Franciacorta DOCG marketing and promotion ➢ Problems with an availability in specialised shops, where consumers are willing to find Franciacorta DOCG the most
Opportunities	**Threats**
➢ Polish consumers' willingness to pay more for a product with high quality and exclusivity ➢ Changing Poles preferences for wine dryness ➢ Consumers express desire to know more about Franciacorta DOCG ➢ It is forecasted that the consumption of sparkling wines and Franciacorta DOCG will increase ➢ Promotion strategies can increase Franciacorta DOCG consumption ➢ Growth of wine drinking culture	➢ Prosecco and Cava are currently the most successful sparkling wines on Polish market ➢ It is forecasted that Prosecco could be most successful on Polish market in next 3 years ➢ Maximum willingness to pay for Franciacorta DOCG (0.75 l bottle) is most frequently PLN100 (21€), as for sparkling wines in general.

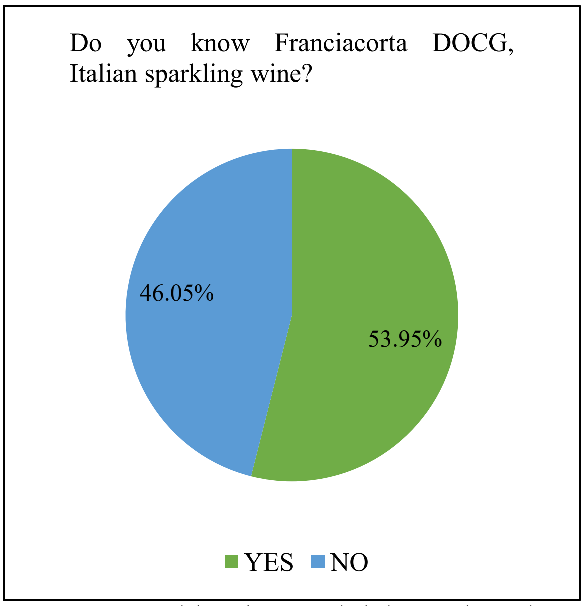
Source: Own elaboration. Concluded on total sample (152). 2022.

6.1.1 Internal factors: strengths and weaknesses

In the Table 13 three strengths factors and three weaknesses factors of Franciacorta DOCG on Polish wine market are presented.

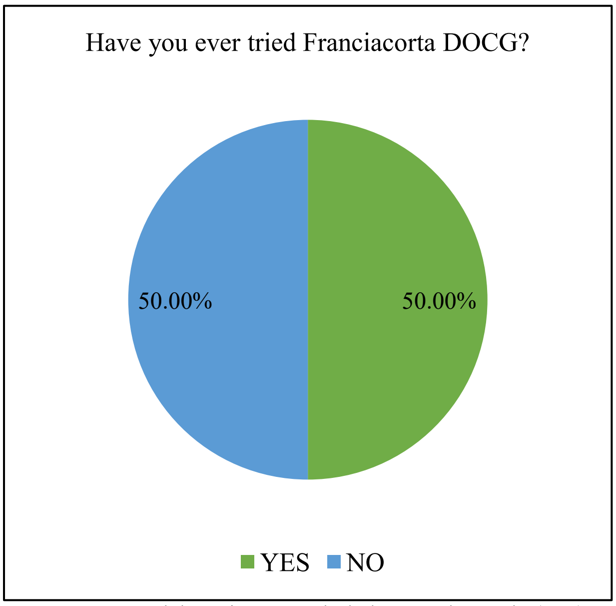
STRENGTHS

Figure 14. Polish consumers awareness about existence of Franciacorta DOCG.



Source: Own elaboration. Concluded on total sample (152). 2022.

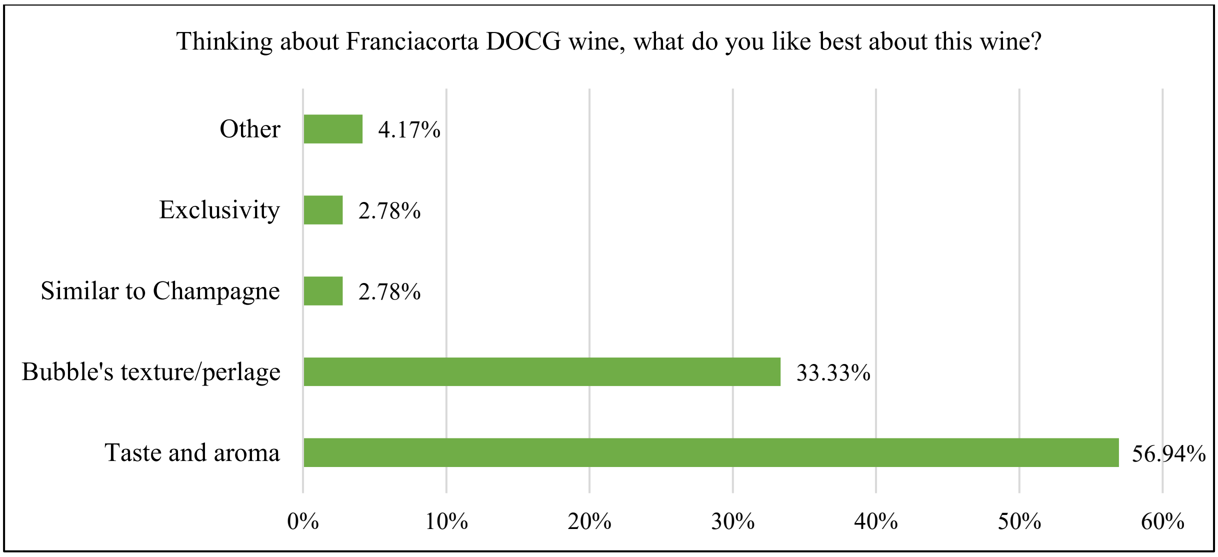
Figure 15. An opportunity to try Franciacorta DOCG by Polish consumers.



Source: Own elaboration. Concluded on total sample (152). 2022.

More than 50 % (53.95 %) of Polish consumers know Franciacorta DOCG (Figure 14) and equal 50.00 % have tried the wine at least once (Figure 15).

Figure 16. Sensory and organoleptic attributes most liked by Polish consumers.



Source: Own elaboration. Concluded on sample (72). 2022.

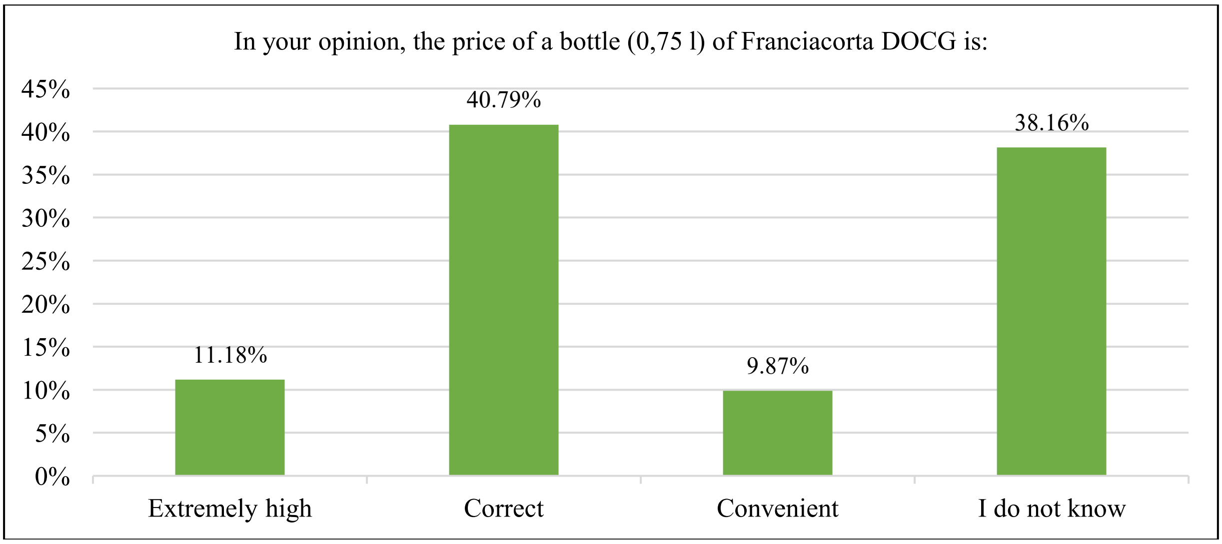
Another strength' value for Franciacorta DOCG is its sensory and organoleptic attributes seen by Polish consumers (Figure 16). Taste and aroma of wine (56.97 %) are most favourable Franciacorta DOCG characteristics indicated by consumers. 33.33 % of participants appreciate the texture of bubbles in wine.

Figure 17. Word cloud of Franciacorta DOCG created, according to Polish consumers answers.

Source: Own elaboration. Concluded on sample (237). 2022

Consumers were asked to enter three words to describe Franciacorta DOCG (Figure 17). The taste of wine: delicate, fruity, velvet, brioche, fresh, complex, full, velvet, light, dry, creamy, are attributes which consumer mention the most (24.89 %). Secondly, consumers like the wine elegance (14.77%) and bubbles' texture (11.81 %). Enjoyment while drinking the wine was mentioned by 10.97 % consumers. Franciacorta DOCG is seen by Polish Consumers as an Italian Champagne (10.13 %) and Italian product (5.49 %). Attributes that Poles identify with Franciacorta DOCG are method of production (3.80 %), expensive price (3.80 %) and other (7.17 %) such as wine of Formula 1, for New Eve, occasional wine and wine for daily consumption.

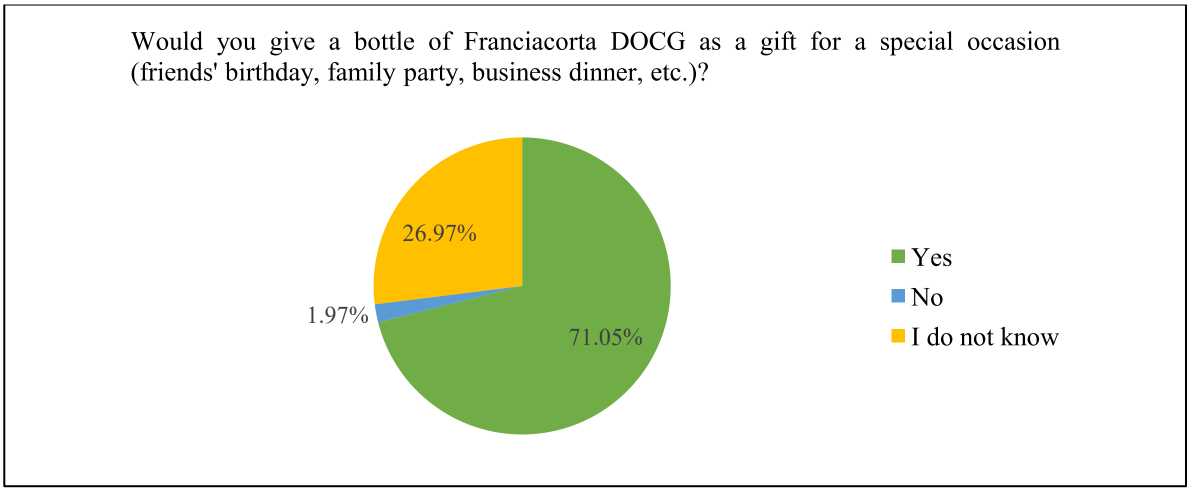
Figure 18. Polish consumer opinion on Franciacorta DOCG bottle (0.75 l).



Source: Own elaboration. Concluded on total sample (152). 2022

As shown in Figure 18, 40.79 % of Polish consumers rate price of a bottle (0.75l) of Franciacorta DOCG as correct. Consumers who know the wine are aware of its origin, method of production and geographical indication which adds value to the product and that is why Franciacorta DOCG price can be seen by Poles as correct. 38.16 % participants do not know if the price of wine is neither high, correct nor convenient. For 11.18 % of consumers price of Franciacorta DOCG is extremely high and for 9.87 % is convenient.

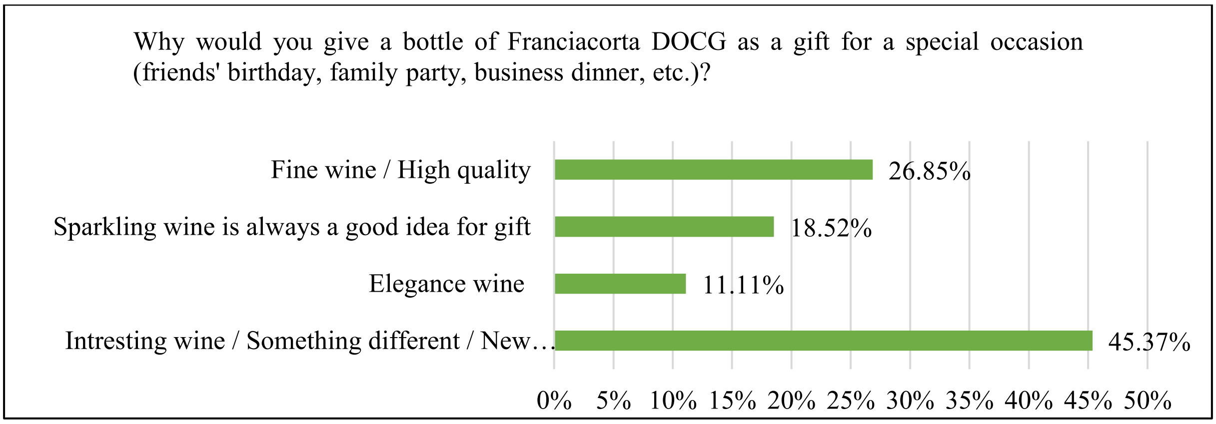
Figure 19. Franciacorta DOCG as a gift idea for special occasion.



Source: Own elaboration. Concluded on total sample (152). 2022

Almost three quarters of consumers (71.05 %) would like to present Franciacorta DOCG as a gift for special occasion. More than a quarter (26.97 %) do not know if yes or no and only few (1.97 %) would not like to present it as a gift (Figure 19).

Figure 20. Reasons to present Franciacorta DOCG as a gift for special occasion according to Polish consumers.



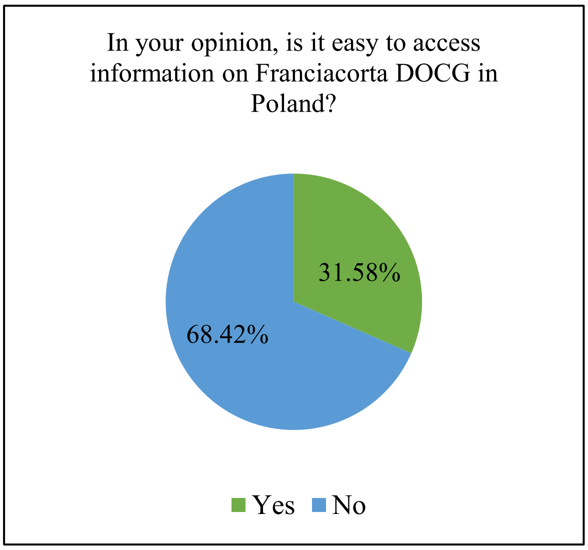
Source: Own elaboration. Concluded on total sample (108). 2022

The main reason given by consumers for presenting Franciacorta DOCG as a gift for special occasion is its uniqueness (45.37 %). Franciacorta DOCG is seen as a new wine on Polish wine market, which can be interesting as an unknown and niche wine. Consumers indicate their interests and curiosity in Franciacorta DOCG as an equivalent to Champagne and different type of wine then well-known Prosecco. Franciacorta DOCG is also seen as a fine wine (26.85 %) which stands for second reason to give the wine someone for special occasion. Consumers emphasised its high quality, wine appellation and good taste. 18.52 % of consumers say that sparkling wine is always a good idea for gift and 11.11 % indicate Franciacorta DOCG as a product that reminds to elegance not only as a wine but also as wine bottle, which is seen as aesthetic (Figure 20).

WEAKNESSES

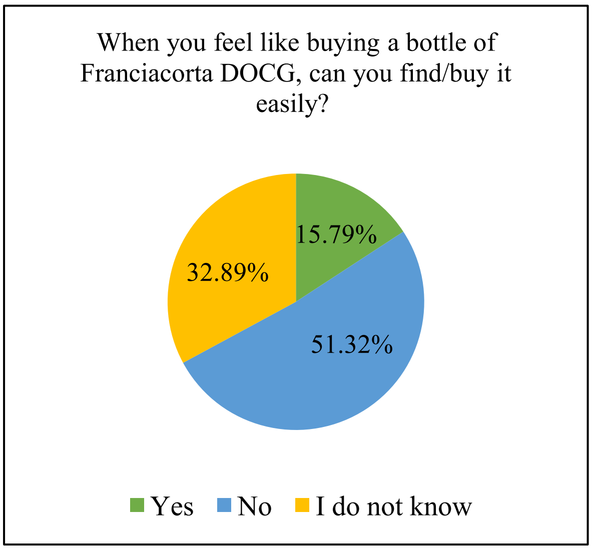
Main weaknesses which are indicated by Polish consumers are difficult access to information about Franciacorta DOCG (68.42 %, Figure 21) and the difficulty when they want to find or buy the wine (51.32 %, Figure 22).

Figure 21. Information access on Franciacorta DOCG in Poland.



Source: Own elaboration. Concluded on total sample (152). 2022

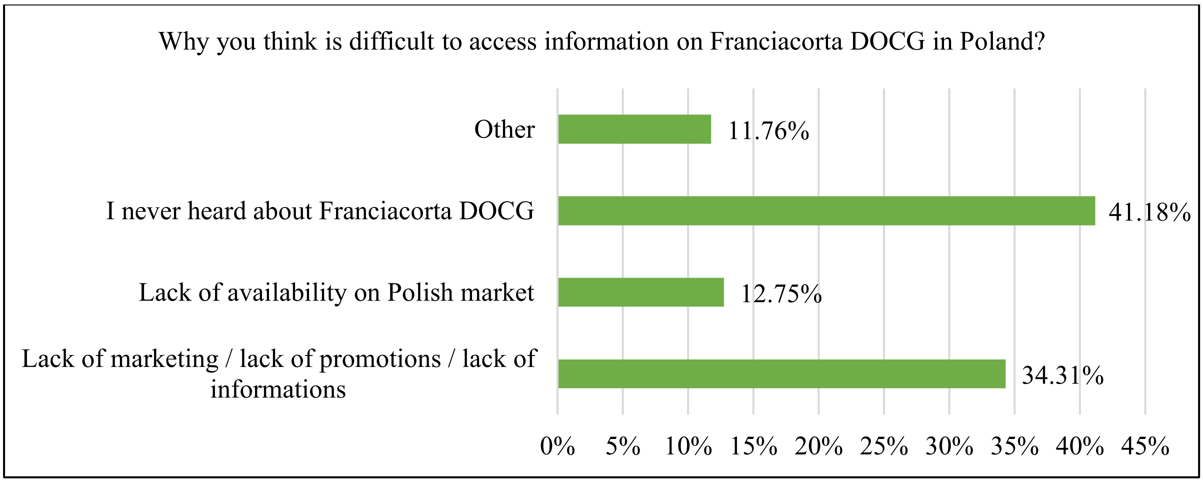
Figure 22. Availability of Franciacorta DOCG on Polish wine market.



Source: Own elaboration. Concluded on total sample (152). 2022

31.58 % of consumers can find information on Franciacorta DOCG easily (Figure 21) and only 15.79 % can easily find or buy wine in Poland without much effort (Figure 22). 32.89 % participants do not know if it is easy or difficult to find or buy Franciacorta DOCG in Poland (Figure 22), which can be seen as a lack of their awareness about wine too. 68.42 % of consumers have difficulties while searching information on Franciacorta DOCG (Figure 21) and 51.32 % can not find or buy it easily in Poland (Figure 22).

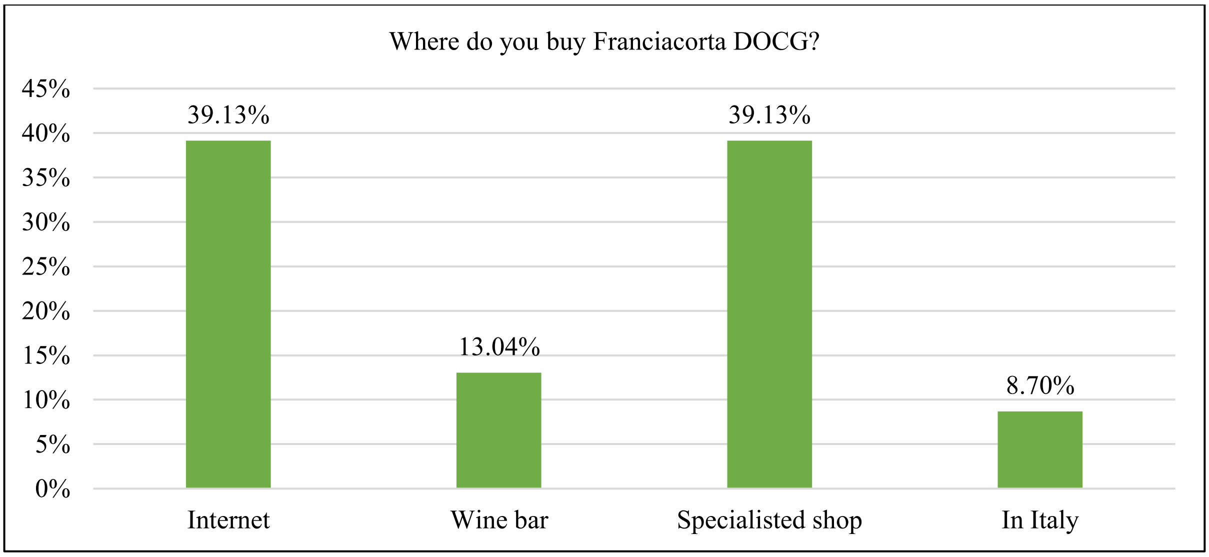
Figure 23. Reasons of difficulties to information access on Franciacorta DOCG in Poland according to Polish consumers.



Source: Own elaboration. Concluded on total sample (102). 2022

As shown in Figure 23, when asked about the difficulties to access information on Franciacorta DOCG in Poland, consumers indicate their lack of wine awareness (41.18 %), they never seen wine nor heard about it in Poland. Lack of wine marketing, promotion, and information (34.31 %) is the second reason why Polish consumers deal with difficult information access on Franciacorta DOCG. General lack of wine availability (12.75 %) on Polish market stands for third reason. Within other reasons (11.76 %) respondents indicate low knowledge of Polish consumers about wines, so it requires time to change alcohol habits consumption.

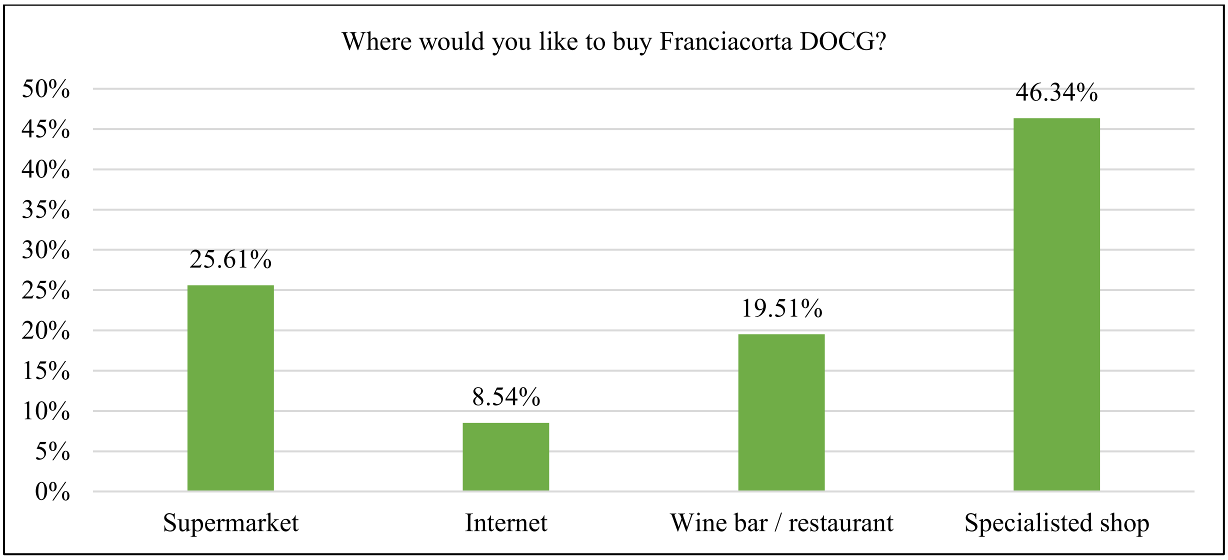
Figure 24. Places of Franciacorta DOCG purchase by Polish consumers.



Source: Own elaboration. Concluded on total sample (23). 2022

As it can be seen on Figure 24, main places where the minorities of respondents buy Franciacorta DOCG is Internet (39.13 %) and specialised shops (39.13 %), wine bars (13.04%) and while traveling to Italy (8.70 %). Those results show the problem with availability of Franciacorta DOCG on Polish wine market.

Figure 25. Places where Polish consumer is willing to purchase Franciacorta DOCG in Poland.



Source: Own elaboration. Concluded on sample (82). 2022

Figure 25 shows the places where Polish consumer would like to but Franciacorta DOCG more easily. At the first place we find specialised shop (46.34 %), followed by supermarkets (25.61 %), wine bar and restaurants (19.51 %), and Internet (8.54 %).

6.1.2 External factors: opportunities and threats

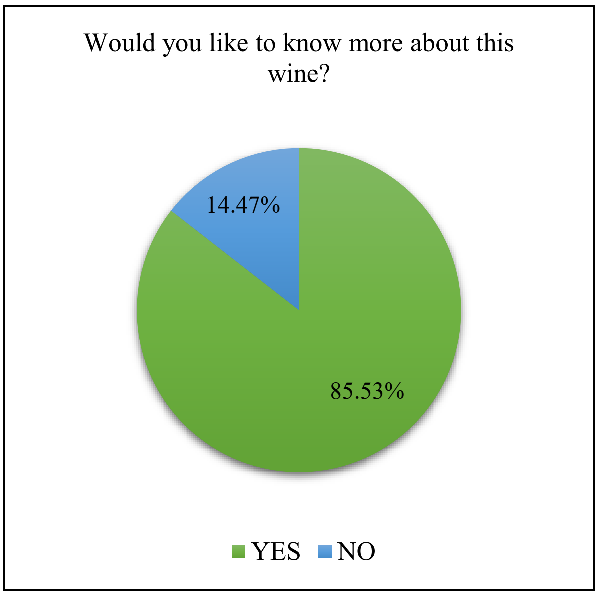
In the Table 13 six opportunities factors and three threats factors of Franciacorta DOCG on Polish wine market are presented.

OPPORTUNITIES

As shown in Table 10, a bottle of sparkling wine (0.75 l) purchased by Poles costs, on average, PLN 104.48 (22 €). The value of Poland's GDP per capita is rising, from 1.07 million US$ in 2016 to 1.44 million US$ in 2021 (Organization for Economic Cooperation and Development, 2023). This growth affects both consumer spending on goods and their decision to purchase alcohol. Aswani (2021) notes that Poles are increasingly likely to spend more on high-quality wines.

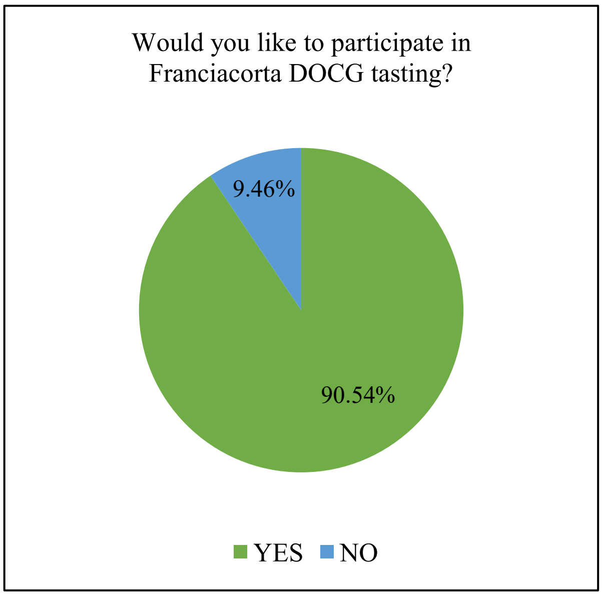
According to information received from questionnaire (Table 10), 54.61 % of Polish wine consumers prefer most brut wines followed by dry wines (19.08 %). Choosing wines of higher level of dryness by Poles is a change, over the years, where the sweet ones were preferred (Wanat, 2022).

Figure 26. Polish consumer interest in get known Franciacorta DOCG.



Source: Own elaboration. Concluded on total sample (152). 2022

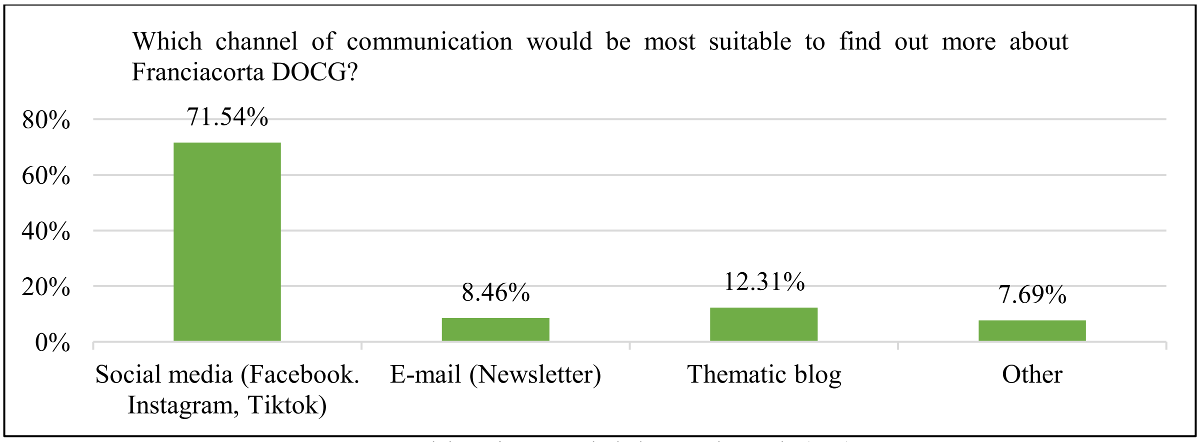
Figure 27. Polish consumer interest in Franciacorta DOCG tasting.



Source: Own elaboration. Concluded on sample (74). 2022

As it is shown in Figure 26, 85.53 % of Polish consumers would like to get more information about Franciacorta DOCG. It shows that not only people who do not know the wine (Figure 14) but also those who already know it would like to boost their knowledge about Franciacorta DOCG. Also 90.54 % consumers would like to participate in Franciacorta DOCG tasting, while only 9.46 % is not interested (Figure 27).

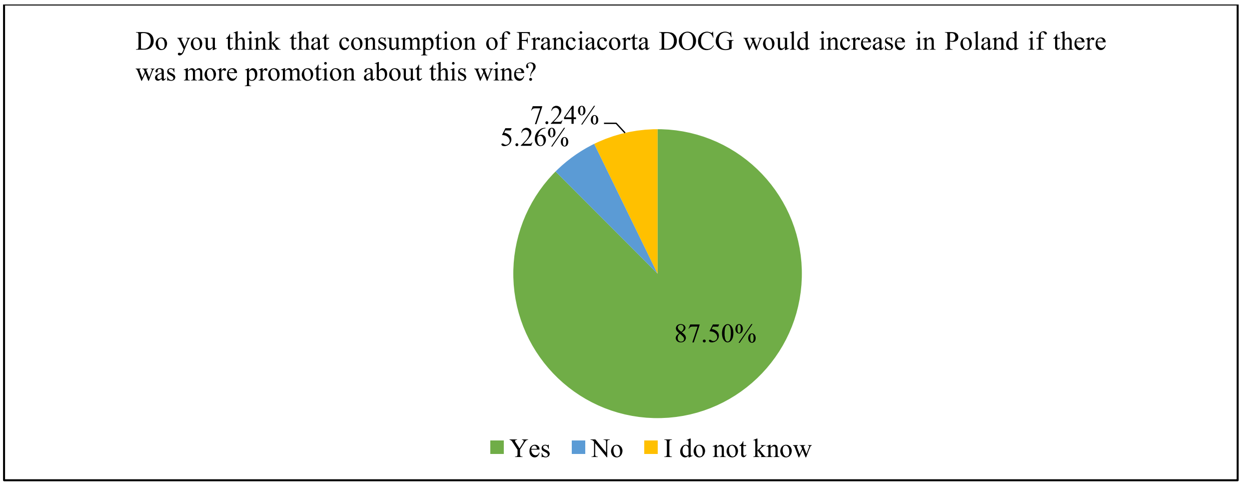
Figure 28. Most preferred communication channel to gain information about Franciacorta DOCG to Polish consumers.



Source: Own elaboration. Concluded on total sample (130). 2022

Most of consumers would choose social media (71.54 %) as the easiest communication channel to get information about Franciacorta DOCG, followed by thematic blogs (12.31 %), via newsletter (8.46 %) and other channels (7.69 %) such as wine tastings, seminars, or articles in specialised journal (Figure 28).

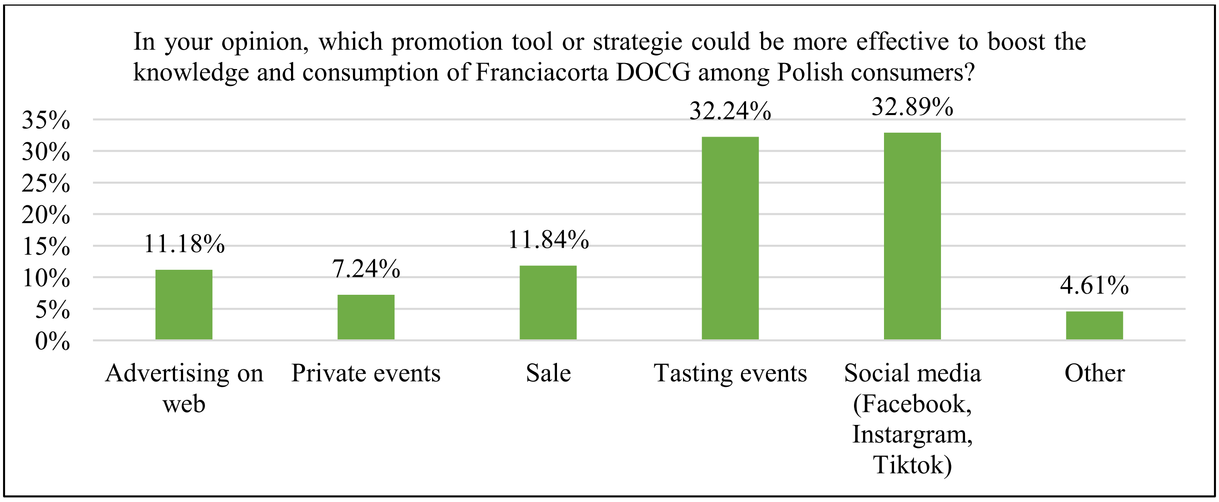
Figure 29. Importance of Franciacorta DOCG promotion in Poland.



Source: Own elaboration. Concluded on total sample (152). 2022

Moreover, 87.50 % of consumers indicate promotions activities as tools to increase Franciacorta DOCG consumption in Poland (Figure 29).

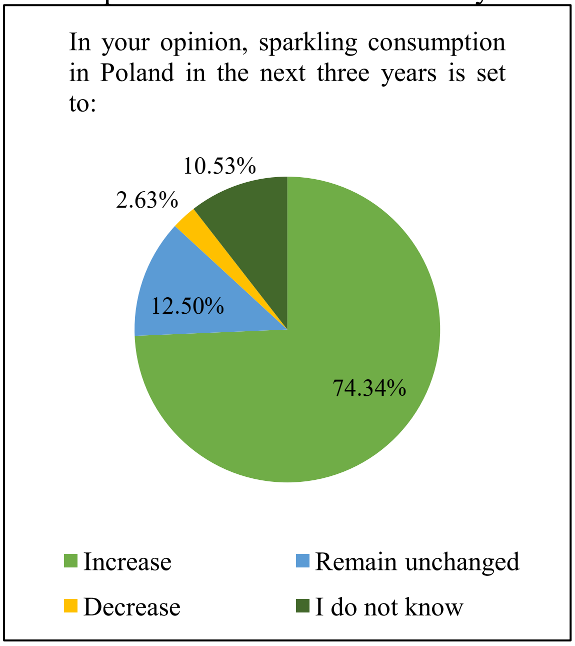
Figure 30. Promotion tools and strategies for Franciacorta DOCG, which can increase knowledge among Polish consumers.



Source: Own elaboration. Concluded on total sample (152). 2022

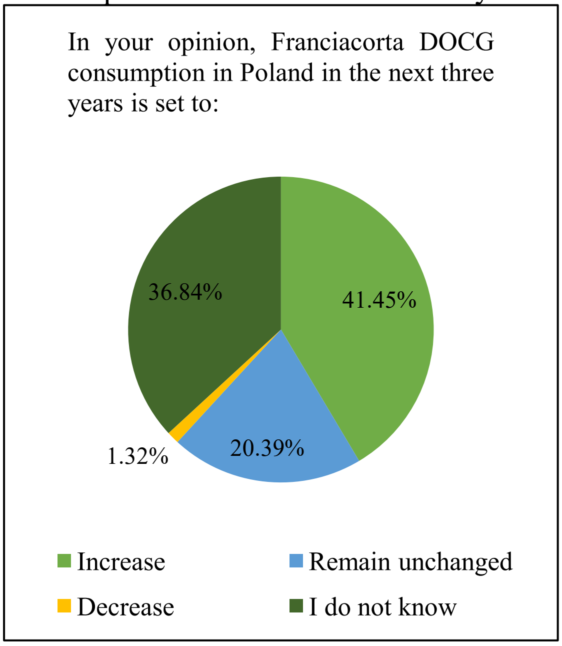
According to consumers (Figure 30), most effective promotion activities to increase the knowledge of Franciacorta DOCG among Polish consumers would be information shared via social media (32.89 %) and wine tasting (32.24 %), followed by promotion sale (11.84 %) and advertising on web (11.18 %), private events (7.24 %), and other tools (4.61 %) such as wine pairings in restaurants or visits of Franciacorta DOCG representants.

Figure 31. Forecast of sparkling wine consumption in Poland in next three years.



Source: Own elaboration. Concluded on total sample (152). 2022

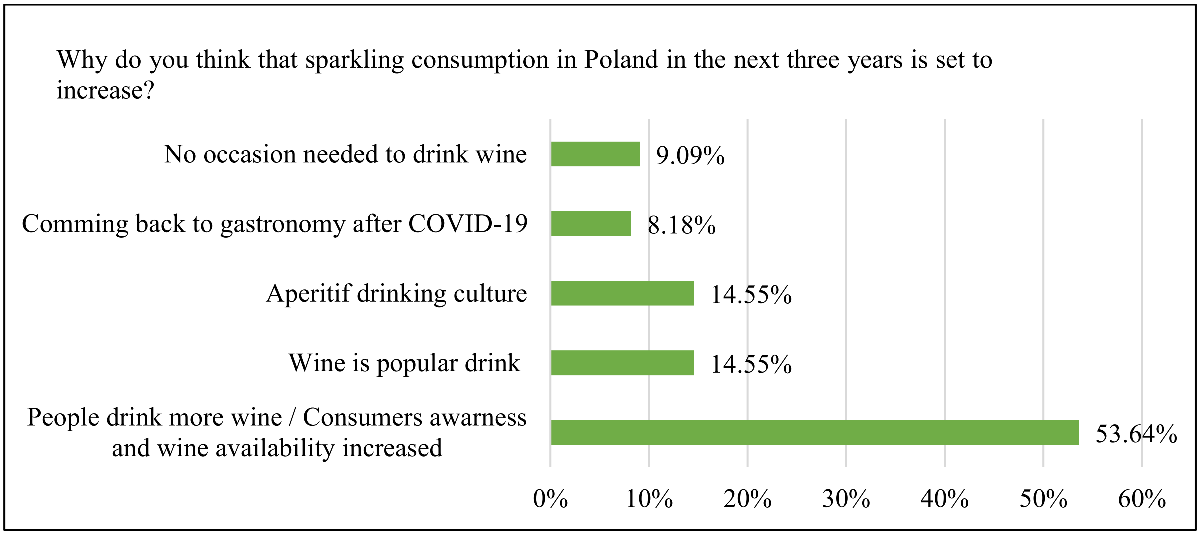
Figure 292. Forecast of Franciacorta DOCG consumption in Poland in next three years.



Source: Own elaboration. Concluded on total sample (152). 2022

According to consumers, within three years consumption of sparkling wine (74.34 %, Figure 31) and Franciacorta DOCG (41.45 %, Figure 32) will increase.

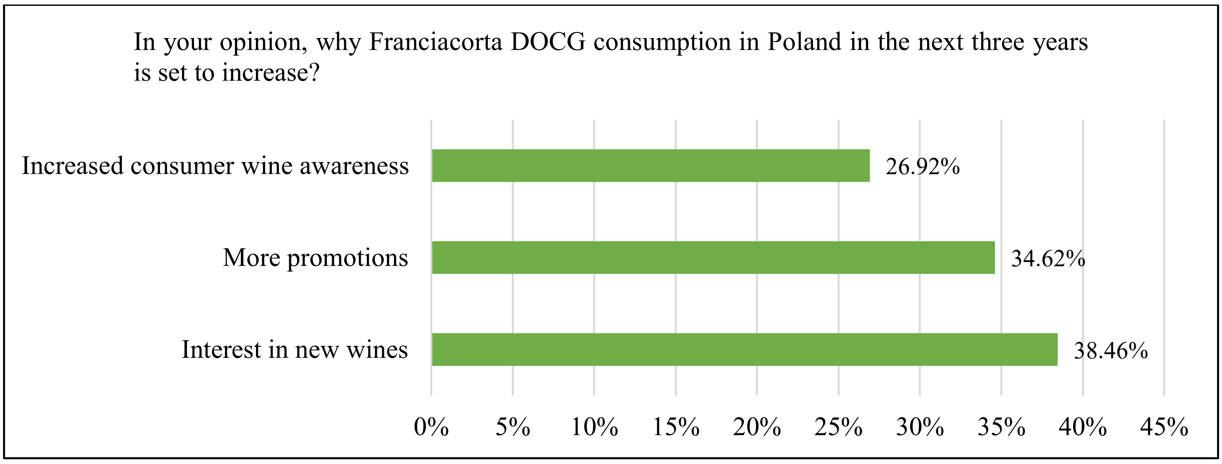
Figure 33. Reasons of sparkling wine consumption increase within three years in Poland.



Source: Own elaboration. Concluded on total sample (110). 2022

The main reason for the increase of sparkling wine consumption in Poland (Figure 33) is due to the increasing consumers awareness and interest for wine as an alcohol consumption (53.64 %). Another reason is the development of aperitif culture (14.55 %) as well as wine popularity as a main choice among alcohols. Drinking wine will be a trend (14.55 %). People will be drinking wine without occasion (9.09 %), which is also linked to what mentioned before, namely the increasing popularity of aperitifs. After COVID-19 time, on-trade channel will be back on track, which can also influence the increase of sparkling wine consumption in Poland (8.18 %).

Figure 34. Reasons of Franciacorta DOCG consumption increase within three years in Poland.



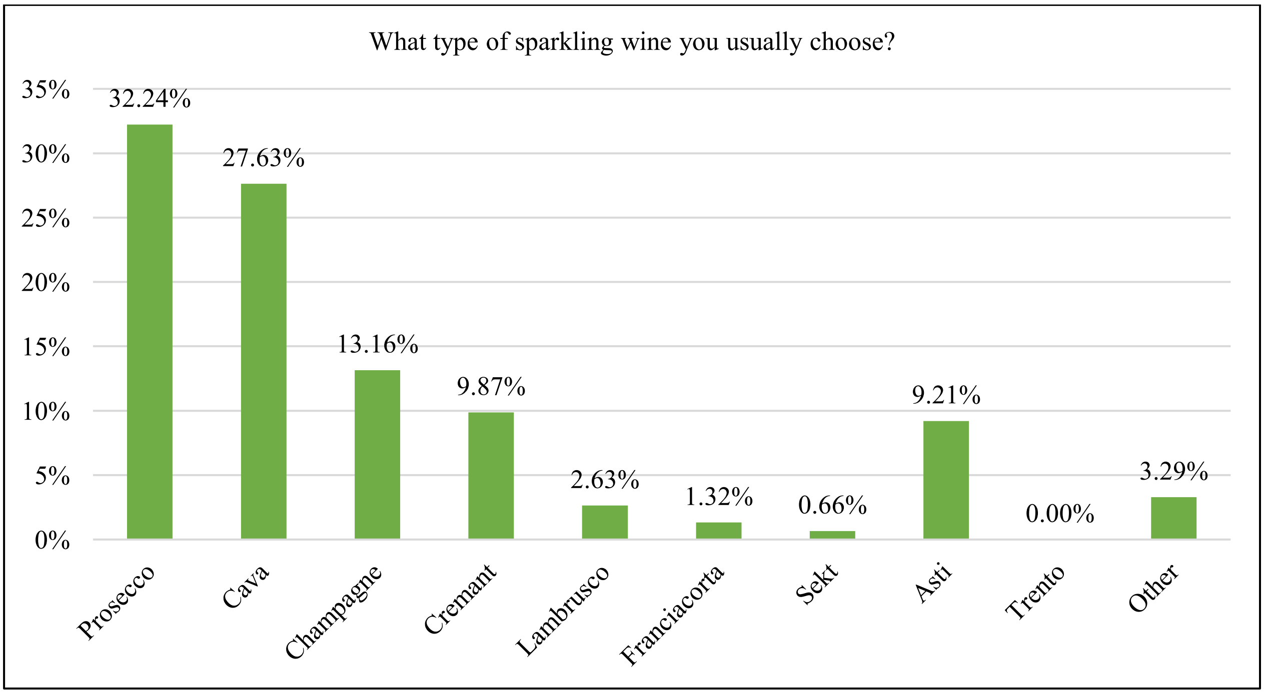
Source: Own elaboration. Concluded on total sample (52). 2022

A driving forces for the increase of Franciacorta DOCG consumption in Poland (Figure 34) could be the increased interest of consumers in unknown wines (38.48 %). As it was mentioned before (Figure 29), promotion of Franciacorta DOCG can be important for its development on the Polish wine market (34.62 %), as the increase of consumer awareness of wine (26.92 %).

THREATS

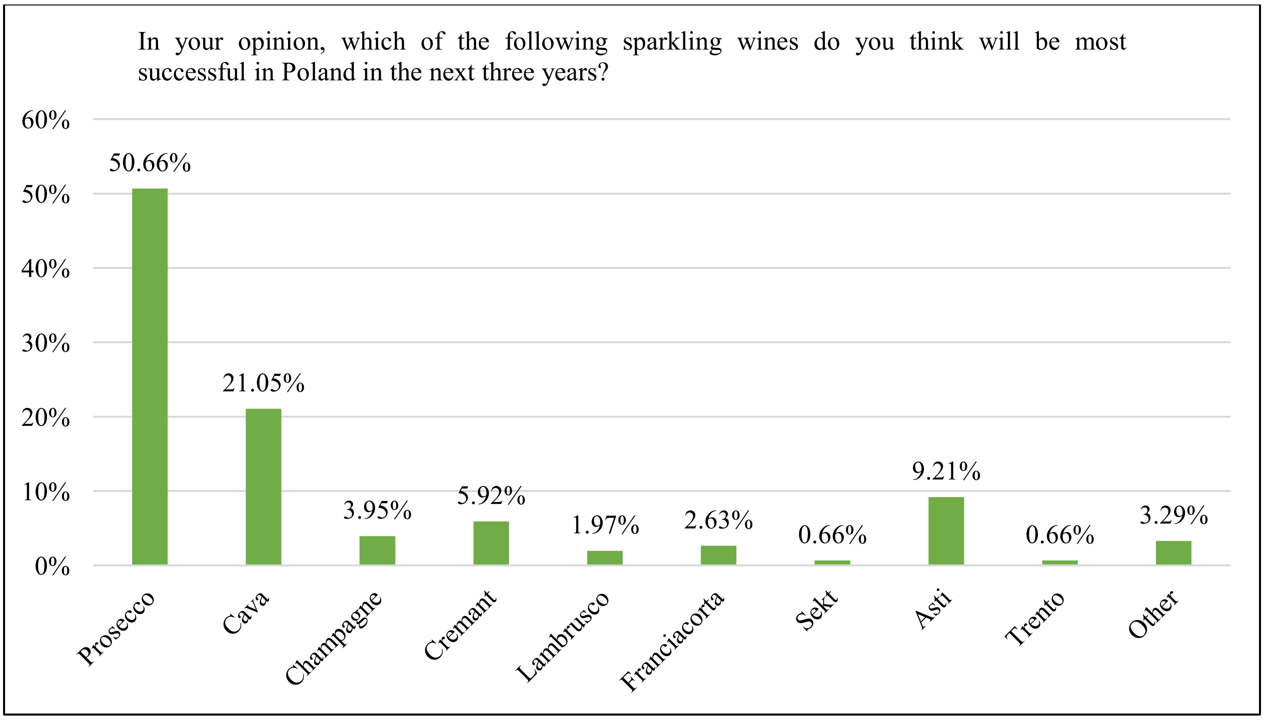
As it has been mentioned by Siwiec (2022), Prosecco stands for 40 % of all chosen sparkling wines by Poles. Figure 35 presents the data from Table 10 about wine consumption habits of Poles. Figure 36 presents the growth in the demand of sparkling wines on the Polish market in the coming three years based on the wine type. Both results show Prosecco domination on the other sparkling wines.

Figure 35. Most frequently purchased type of sparkling wine by Polish consumer.



Source: Own elaboration. Concluded on total sample (152). 2022

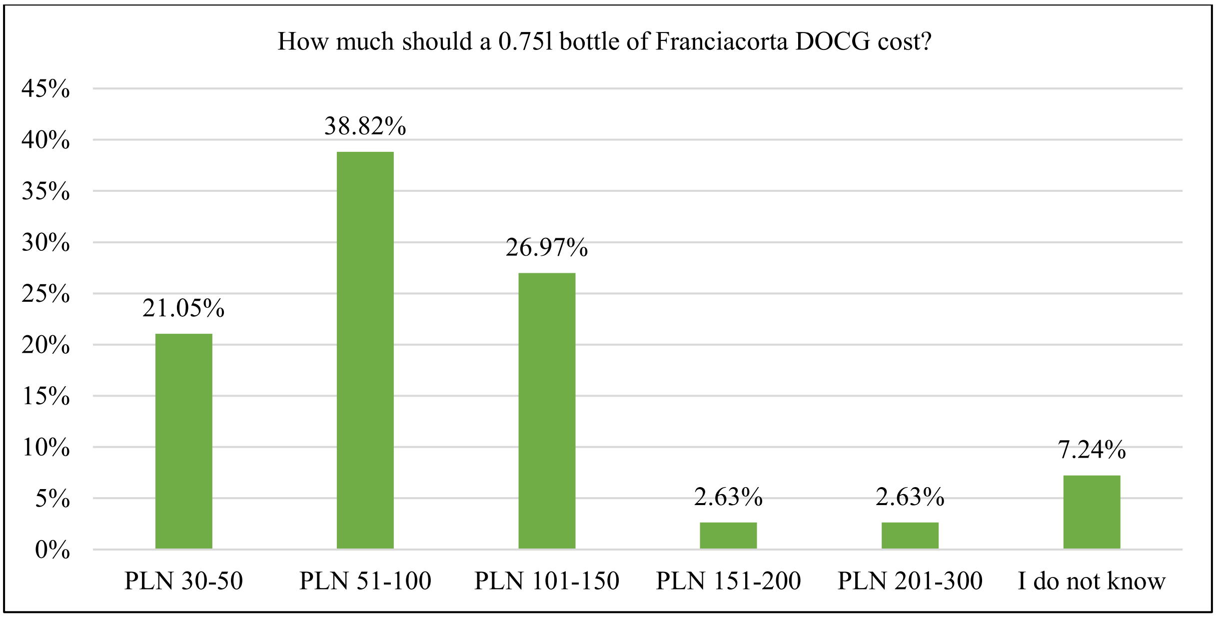
Figure 306. Growth in the demand of sparkling wines on Polish market in the coming three years.



Source: Own elaboration. Concluded on total sample (152). 2022

Prosecco is purchased by 32.24 % of participants and its consumption is predicted to increase by almost 20 % (50.66 %) in the following three years. Within consumers, there are 27.63 % of Cava' drinkers, whose number in the next three years is predicted to decrease by 6 % (21.05 %). Consumers are going to purchase less French sparkling wines: Champagne (decrease of 10 %) and Crémant (decrease of 4 %). Purchase of Franciacorta DOCG can increase slightly as well as purchase of Trento wine. Within 3.29 % of sparkling wines, consumers indicated purchasing Polish sparkling wines, Pet-Nat and Corpinnat. Hence, Prosecco wine and Trento wine (this latter, slightly) can represent competitive wines for the development of the Franciacorta DOCG market in Poland.

Figure 37. Price of Franciacorta DOCG 0.75l bottle, which Polish consumer would be able to pay.



Source: Own elaboration. Concluded on total sample (152). 2022

The prices range (In Table 10) of a sparkling wine (0.75 l) bottle which Polish consumer would purchase most likely is PLN 51 - 100 (10-21 €) (40.13 %). Furthermore, the average price of this bottle cost PLN 104.48 (22 €) with standard deviation equal 82.35. Consumers also indicate range price in which Franciacorta DOCG would be more affordable for them (Figure 37). 38.82 % of consumer state that the price range should be PLN 51 - 100 (10-21 €), followed by 26.97 % who state PLN 101-150 (21-30 €), and 21.05 % PLN 30-50 (6-10 €). Only 5.26 % of consumers would purchase Franciacorta DOCG if its price was above PLN

150 (above 30 €). According to a small market research made (on internet) within this research, in Cracow prices of Franciacorta DOCG start from PLN 160 (34 €).

6.2 Survey on wine operators in the Polish market: focus on premium sparkling wines and Franciacorta DOCG

The survey contained a few questions, which gathered answered from less than 107 participants. It is driven by fact that consumers were moved to question depending on the previous answer. All answers were concluded to total sample.

Based on Professionals' answers, SWOT analysis of sparkling wines and Franciacorta DOCG was performed (Table 14).

Table 14. SWOT analysis. Polish wine Professionals' point of view.

Strengths	**Weaknesses**
➢ White premium sparkling wines are drunk almost equal by women and men ➢ Price of Franciacorta DOCG seemed to be correct and convenient for Professionals ➢ Tasting events and seminars with Franciacorta DOCG representatives can effectively increase the awareness among wine Professionals	➢ Difficult to find or buy Franciacorta DOCG in Poland ➢ Lack of Franciacorta DOCG marketing and promotion ➢ Polish wine business partners do not know if and how the Franciacorta DOCG suppliers offer support to Franciacorta DOCG import to Poland
Opportunities	**Threats**
➢ There is a developing market for premium sparkling wines in Poland, due to the growth in GDP ➢ It is easy to access information about premium sparkling wines in Poland and they are highly available on the market ➢ Polish consumes are willing to use wine' applications to gather more information about wine ➢ Poles mostly prefer the white style for premium sparkling wines ➢ Changing Poles preferences for wine dryness ➢ Premium sparkling wines from Old World are of interest for Poles ➢ It is forecasted that consumption of premium sparkling wines and Franciacorta DOCG will increase ➢ There is interest in rosé sparkling wine among Polish consumers ➢ Increase in demand of premium sparkling wines and consumer awareness	➢ Champagne is the most preferred premium sparkling wine by Poles ➢ There are no activities or promotional elements of Franciacorta DOCG in the Polish market ➢ Lack of Franciacorta DOCG availability on Polish wine market ➢ Polish consumers prefer purchasing sparkling wines from well-known producers (brands)

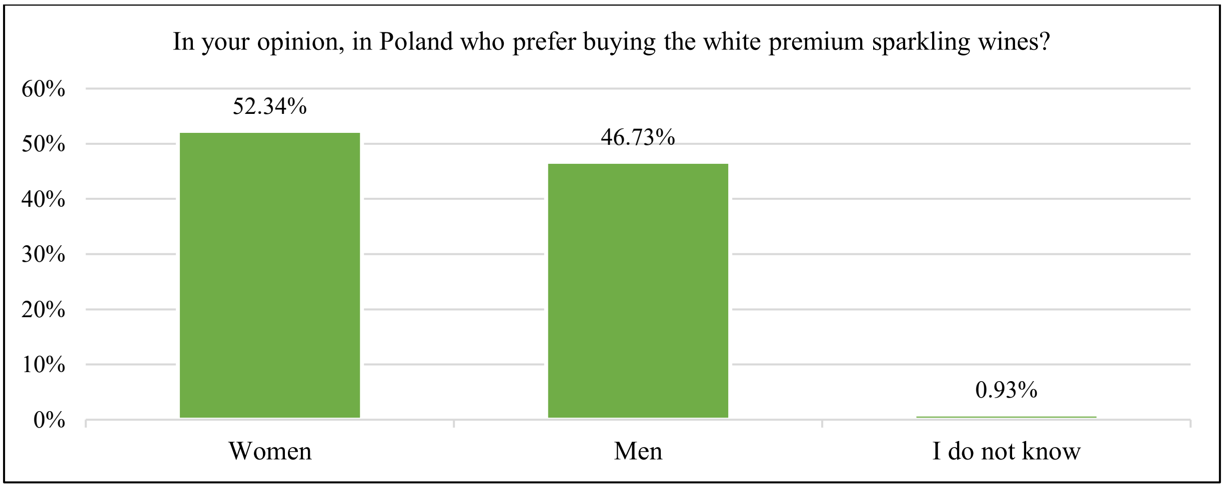
Source: Own elaboration. Concluded on total sample (107). 2022

6.2.1 Internal factors: strengths and weaknesses

In Table 14, three strengths factors and three weaknesses factors of Franciacorta DOCG and premium sparkling wines on Polish wine market are presented.

STRENGTHS

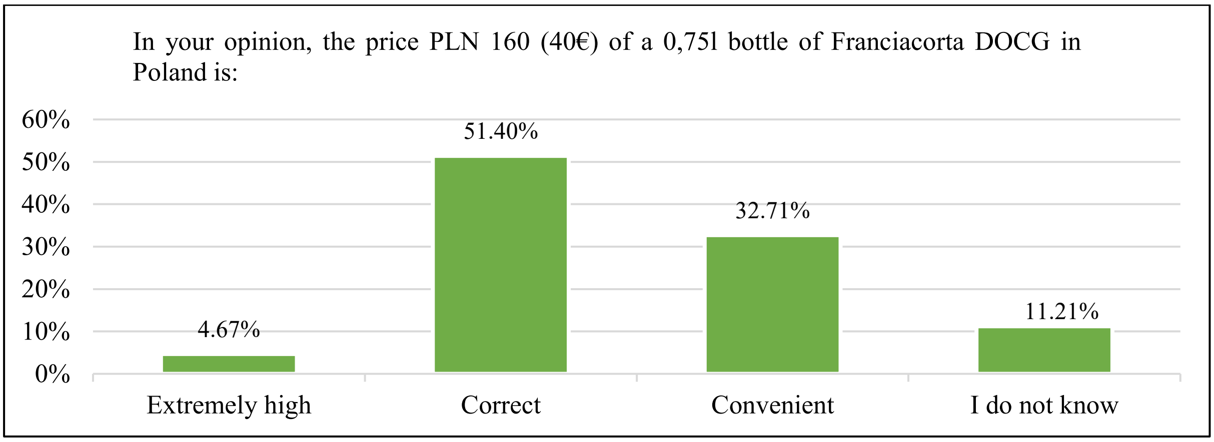
Figure 38. Purchasing white premium sparkling wine by Consumers according to the gender - Professionals point of view.



Source: Own elaboration. Concluded on total sample (107). 2022

In the Professionals opinion (Figure 38), there is no big difference between women and men while purchasing white premium sparkling wine. 52.34 % of respondents think that men more often purchase white premium sparkling wines than women. From the other side there are 46.73 % Professional who think that women buy more frequently white premium sparkling wine than men. Only 0.93 % respondents do not know who buy with wine more frequently.

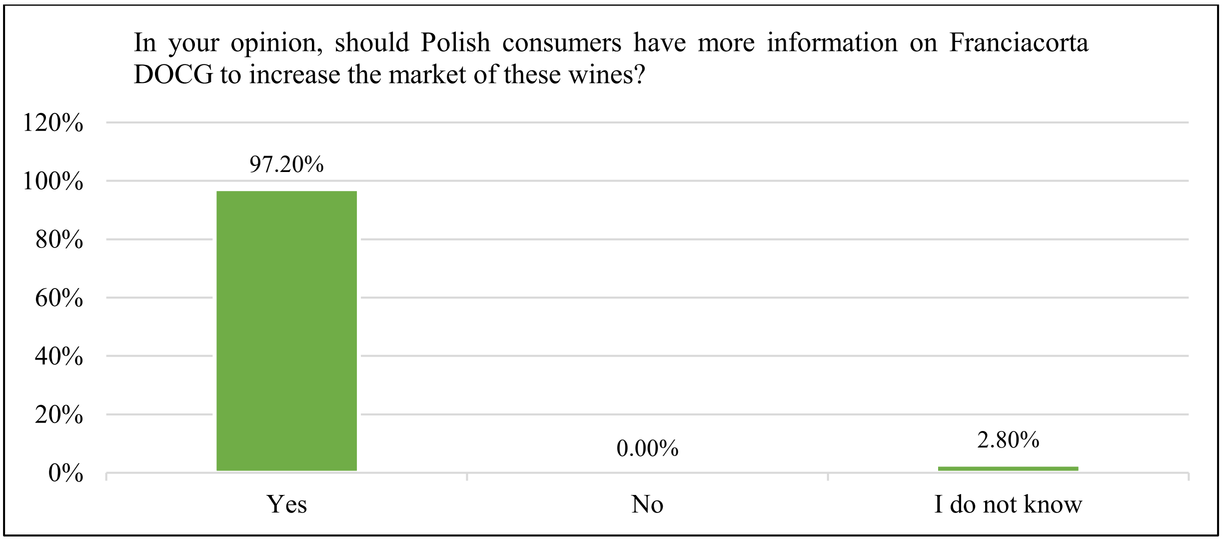
Figure 39. Professionals' opinion of price for Franciacorta DOCG bottle (0.75 l).



Source: Own elaboration. Concluded on total sample (107). 2022

51.40 % of Professionals think that PLN 160 (40€) for a bottle (0.75 l) of Franciaocorta DOCG is a correct price. 32.71 % of respondends say is convinient and only 4.67 % think it is extremly high. 11.21 % of Professional do not know if the price is high, correct or convinient (Figure 39).

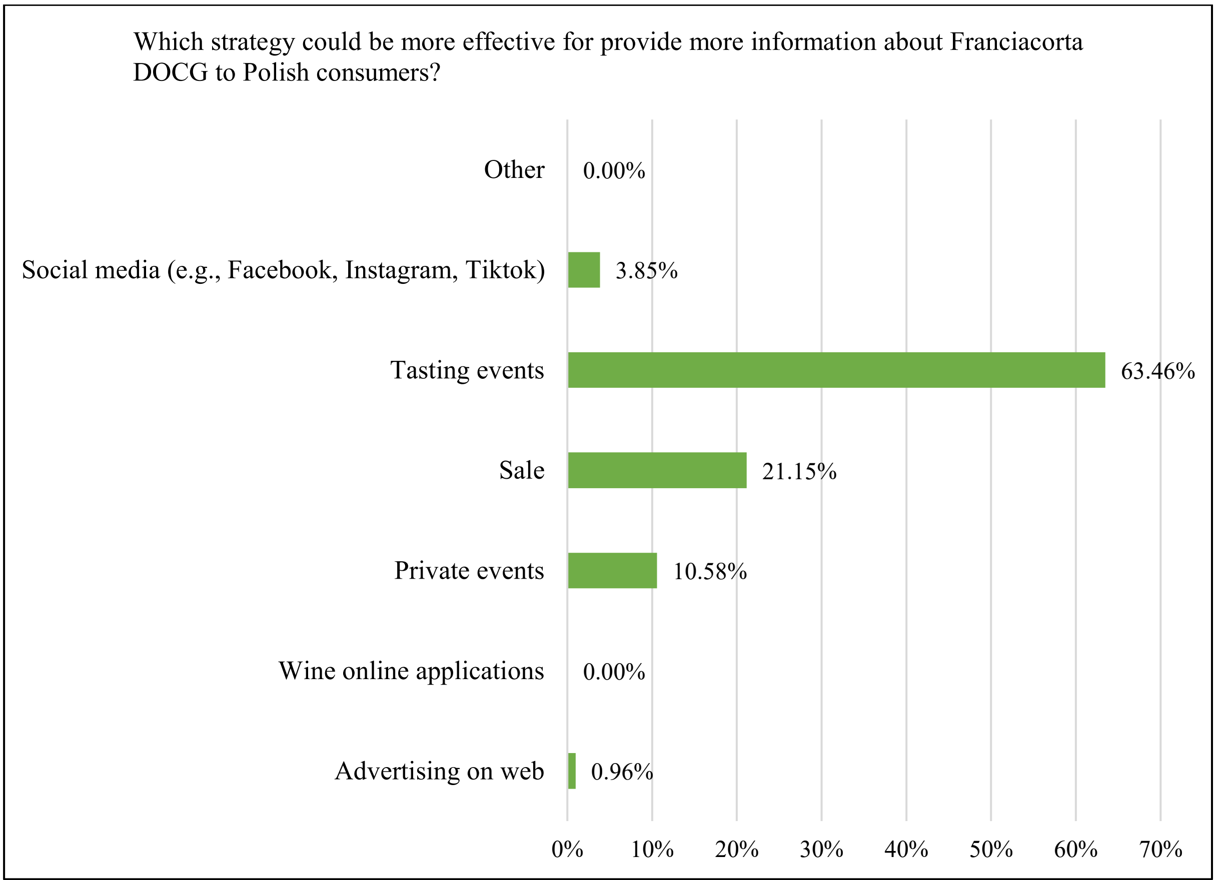
Figure 40. Importance of providing more information on Franciacorta DOCG to Polish consumer to increase the market of Franciacorta DOCG wine.



Source: Own elaboration. Concluded on total sample (107). 2022

In the opinion of Professionals (Figure 40), providing more information about Franciacorta DOCG to Polish consumers can be an effective way to increase the number of these wines on the Polish wine market (97.20 %).

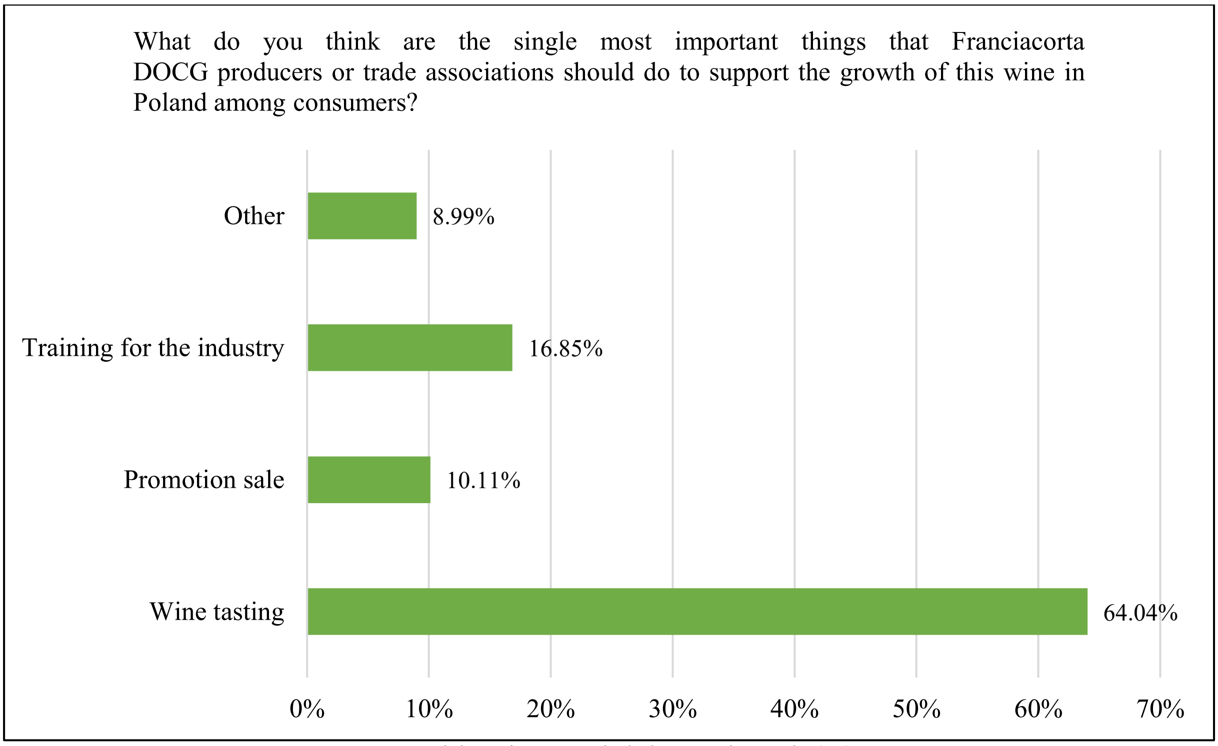
Figure 41. Strategies to provide information about Franciacorta DOCG to Polish consumers.



Source: Own elaboration. Concluded on total sample (104). 2022

As believed by respondents (Figure 41), Franciacorta DOCG tasting events could be an effective strategy to provide more information about wine to Polish consumers (63.46 %). Next, promotion wine sale (21.15 %) and private events (10.58) are highlighted as another strategies. Only 3.85 % Professionals vote for social media as the source of information and 0.96 % vote for web advertisement. No one chose wine application as the strategy to provide information to consumers about Franciacorta DOCG.

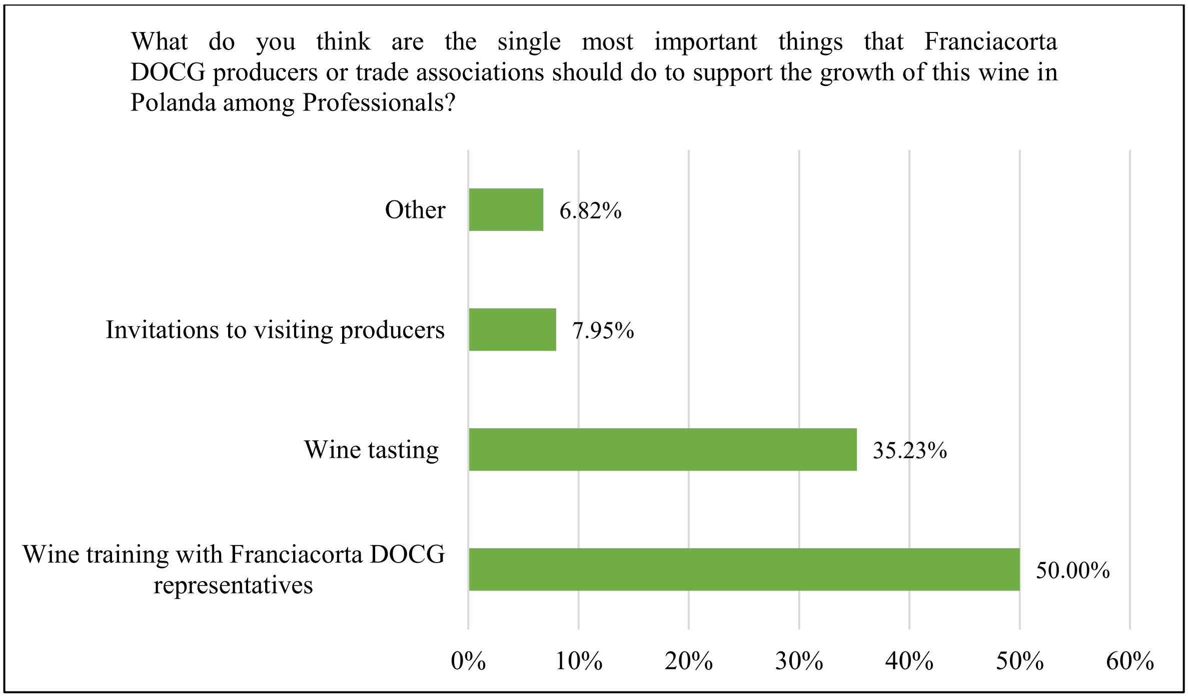
Figure 42. Initiatives of Franciacorta DOCG producers or trade associations that can support growth of this wine among Polish consumers - Professionals opinions.



Source: Own elaboration. Concluded on total sample (89). 2022

According to Professionals (Figure 42), Franciacorta DOCG producers or trade associations could organize wine tastings (64.04 %), which would be the most suitable strategy to increase the interest in wine among Polish consumers. Training for Professionals is also highlighted as an important action (16.85 %). In the Professionals opinion, they are at least partly responsible for Polish consumer wine knowledge, that is why Franciacorta DOCG associations should focus on trainings for Professionals. Wine promotion sales are mentioned by 10.11 % of respondents. Within the remaining 8.99 %, Professionals mention the marketing development, supporting sales with gadgets, organizing private events which consumers can feel as more exclusive, the same as the Franciacorta DOCG wine is seen as.

Figure 43. Initiatives of Franciacorta DOCG producers or trade associations that can support growth of this wine among Professionals.

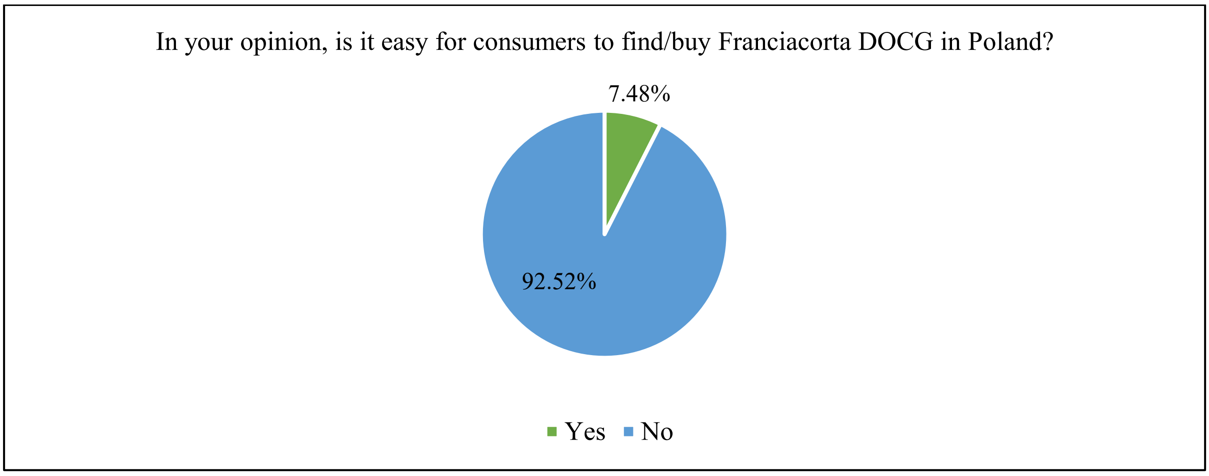


Source: Own elaboration. Concluded on total sample (88). 2022

The most important initiative of Franciacorta DOCG producers or trade associations which can support the growth of this wine among Professionals is wine training with Franciacorta DOCG representatives (50.00 %), followed by Franciacorta DOCG wine tasting (35.23 %). 7.95 % of Professionals would like to be invited to visiting wine producers' vineyards. Within the remaining 6.82 %, respondents say that producers or trade associations should work on Franciacorta DOCG marketing for the Polish market and offer support for the sale by distributors (Figure 43).

WEAKNESES

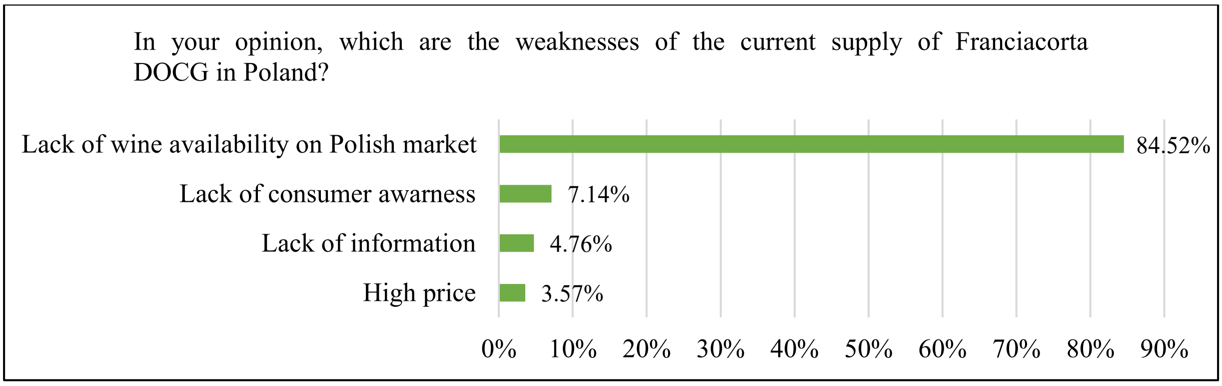
Figure 44. Availability of Franciacorta DOCG on Polish wine market.



Source: Own elaboration. Concluded on total sample (107). 2022

As reported by Professioanls, for Consumers it is hard to find or buy Franciaocrta DOCG on the Polish wine market (92.52 %). Only 7.48 % say that the wine is easily available (Figure 44).

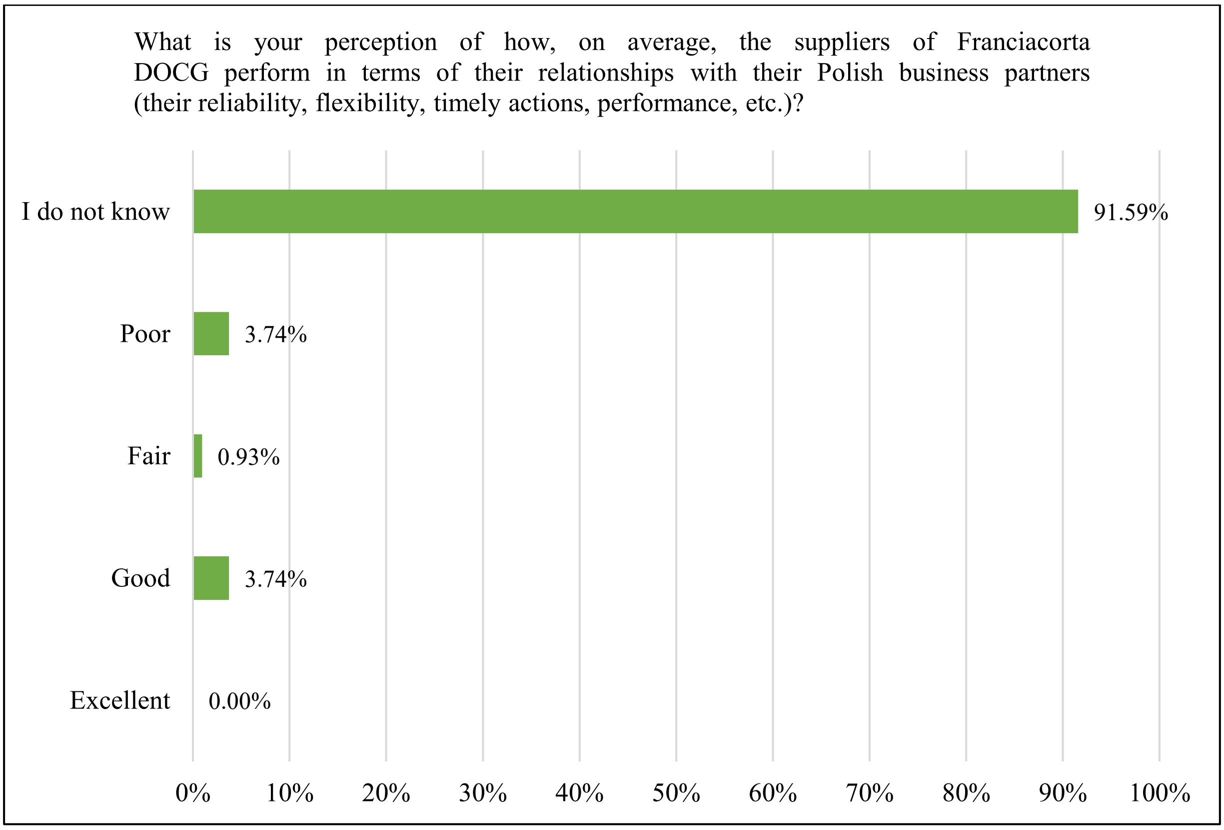
Figure 45. Weaknesses of the current supply of Franciacorta DOCG in Poland - Professionals point of view.



Source: Own elaboration. Concluded on total sample (84). 2022

According to Professionals (Figure 45), the main weaknesses of the current supply of Franciaocorta DOCG in Poland is its scarce availability on wine market (84.52 %). Lack of consumer awareness about wine stands for the second reason (7.14 %). Lack of information about wine (4.76 %) and its high prices (3.57 %) are another factors which influence the current supply of Franciacorta DOCG on the Polish wine market.

Figure 46. Professionals' opinion on business cooperation with Franciacorta DOCG suppliers.



Source: Own elaboration. Concluded on total sample (107). 2022

91.59 % of Professionals do not know how the Franciaocrta DOCG suppliers perform in terms of their relationship with Polish business partners. 3.74 % think that it is poor and the same respondends say that is good. 0.93 % Professioanls claims that the cooperation is fair. No one choose excellent option (Figure 46).

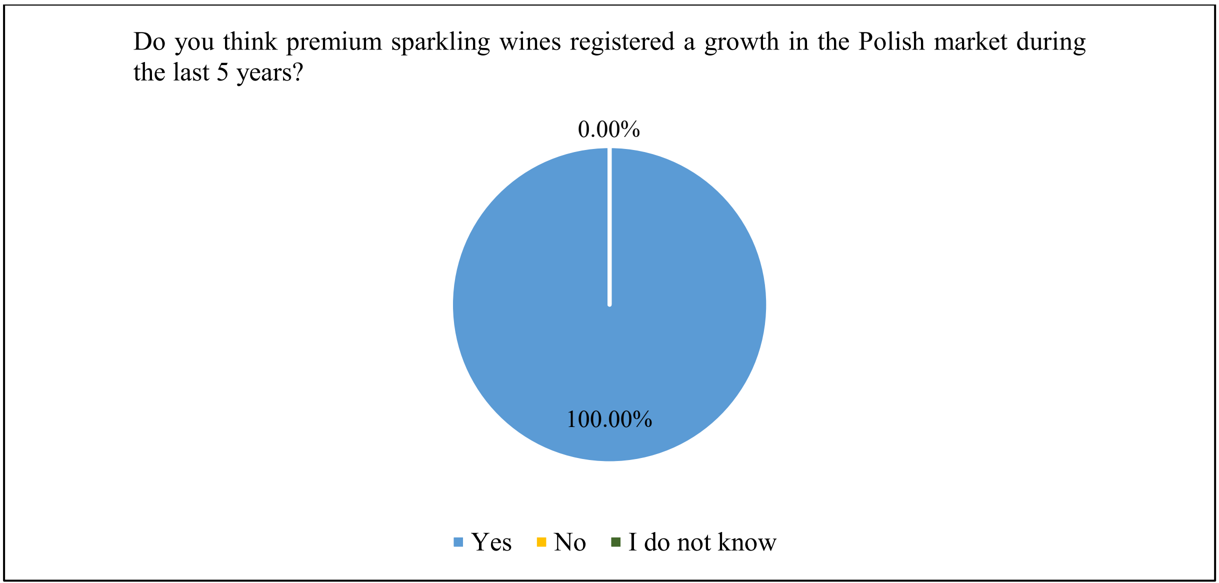
6.2.2 External factors: opportunities and threats

In the Table 14, nine opportunities and four threats of Franciacorta DOCG on the Polish wine market are pointed out.

OPPORTUNITIES

As it is shown in Figure 47, 100.00 % of Professionals agree that premium sparkling wine market in Poland has experienced a growth boom during last five years. It is a strength point in the case of Polish wine market development in the recent years. Growing Poles' wealth (The World Bank, 2022) and consumer awareness can lead to wine premiumization and greater attention of its consumption in Poland.

Figure 47. Professionals' opinion about growth of premium sparkling wines in the Polish market during last 5 years.



Source: Own elaboration. Concluded on total sample (107). 2022

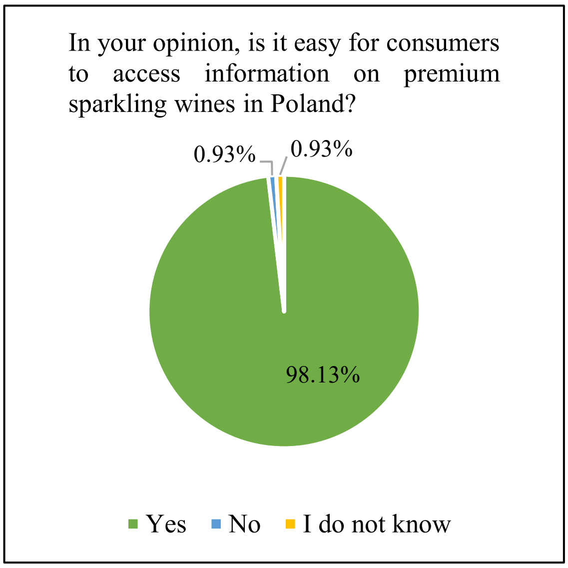
Table 15. Professionals' opinion about importance of drivers which influence continuous growth of premium sparkling wines in Poland (1 – not at all important, 7 – very important)

Variables	N	Mean
Most sparkling wines offer a very good price/quality ratio	107	6.46
There is a general upward trend for the entire category of sparkling wines	107	6.65
There are a few well-known brands that are driving the whole sparkling category upward	107	6.53
Well-known wine writers and critics are praising sparkling wines	107	3.87
New consumers are entering the market for sparkling wines	107	6.01
Consumers are finding that sparkling wines are appropriate for many occasions – not just celebrations	107	6.32
There is increased distribution of sparkling wines across many on- and off-premises channels	107	6.54

Source: Own elaboration. Concluded on total sample (107). 2022.

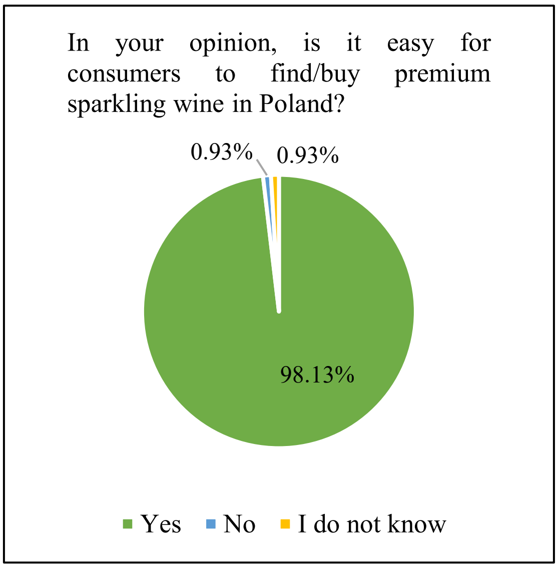
According to results from Table 15, almost for all drivers of premium sparkling wine growth in Poland, Professionals attach a high degree of importance (results have a mean rating of 6.05). Only “Well-known wine writers and critics are praising sparkling wines” factor received rate below 6, which indicates less importance in the case of its influence on premium sparkling wine growth in Polish market.

Figure 48. Information access on premium sparkling wines in Poland.



Source: Own elaboration. Concluded on total sample (107). 2022.

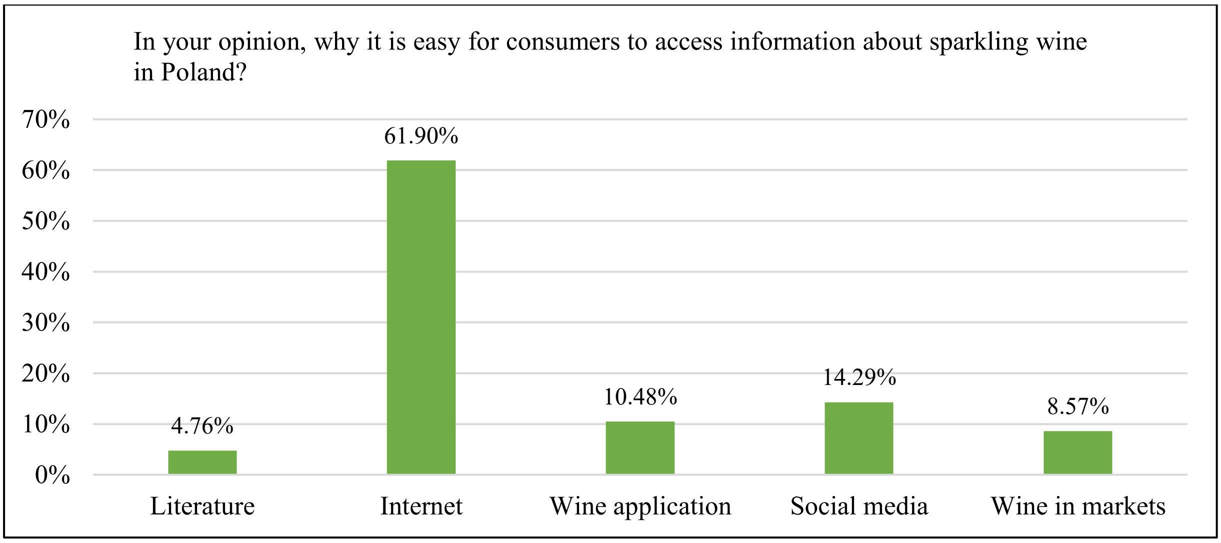
Figure 49. Availability of premium sparkling wines on Polish wine market.



Source: Own elaboration. Concluded on total sample (107). 2022.

98.13 % of Professionals think that there is wide availability of information (Figure 48) and of premium sparkling wines on the Polish wine market (Figure 49). Only 0.93 % of respondents do not know or do not agree that the consumer has an easy access to sparkling wine selection (Figure 49) and information on it (Figure 48).

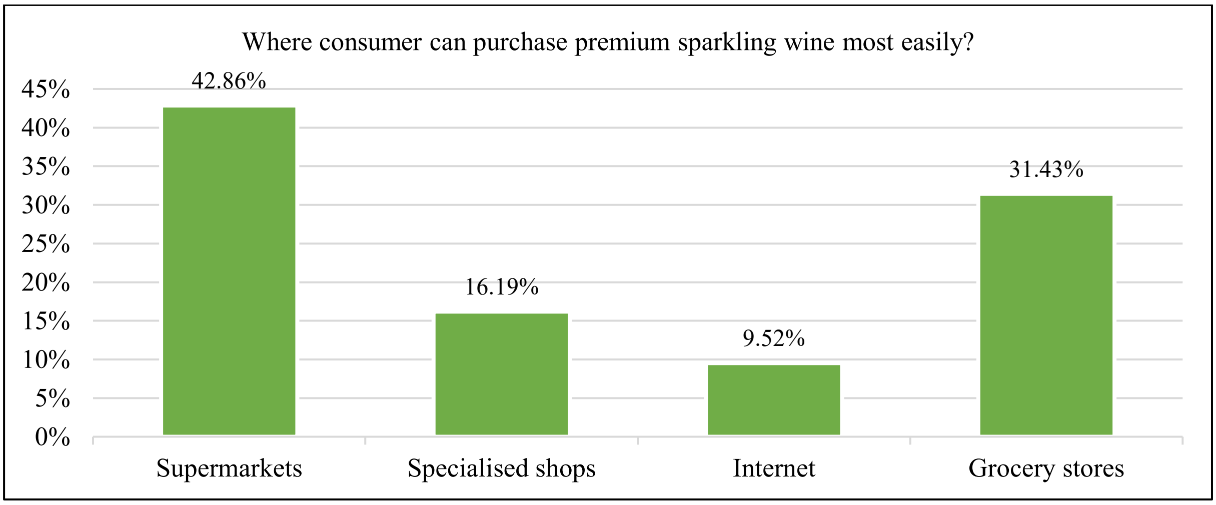
Figure 50. Reasons of easiness to information access on premium sparkling wines in by consumer in Poland – Professionals point of view.



Source: Own elaboration. Concluded on total sample (105). 2022.

As claimed by Professionals (Figure 50), Internet is the main source for providing information about premium sparkling wines to consumers (61.90 %). 14.29 % say that Polish consumer receives information on wine via social media. 10.48 % respondents claim that wine applications help them. 8.57 % think that groceries/supermarkets provide information most easily and 4.76 % vote for literature sources.

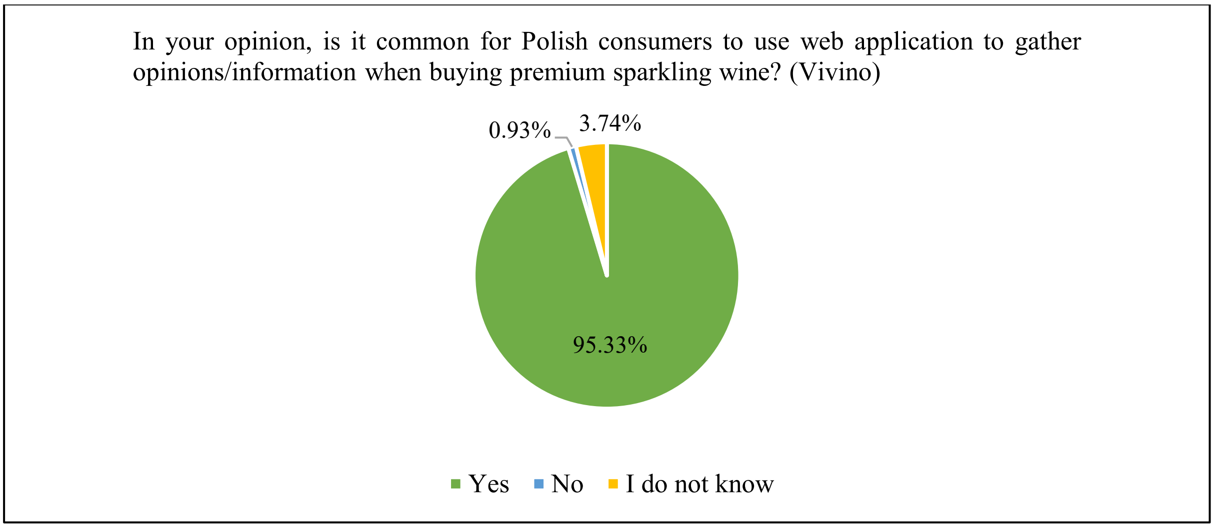
Figure 51. Places of premium sparkling wine purchase by Polish consumers.



Source: Own elaboration. Concluded on total sample (105). 2022.

According to Professionals (Figure 51), Polish consumer can find premium sparkling wine most easily in supermarkets (42.86 %) and in every grocery store (31.43 %). 16.19 % recommend specialised shops and 9.52 % think that premium sparkling wines can be purchased most easily via Internet. Wide availability of premium sparkling wines in supermarkets and grocery shop stands for a strength for the Polish wine market. Consumer can easily get know better unknown alcohol choice while everyday shopping. It may influence on Consumer future choice of alcohol.

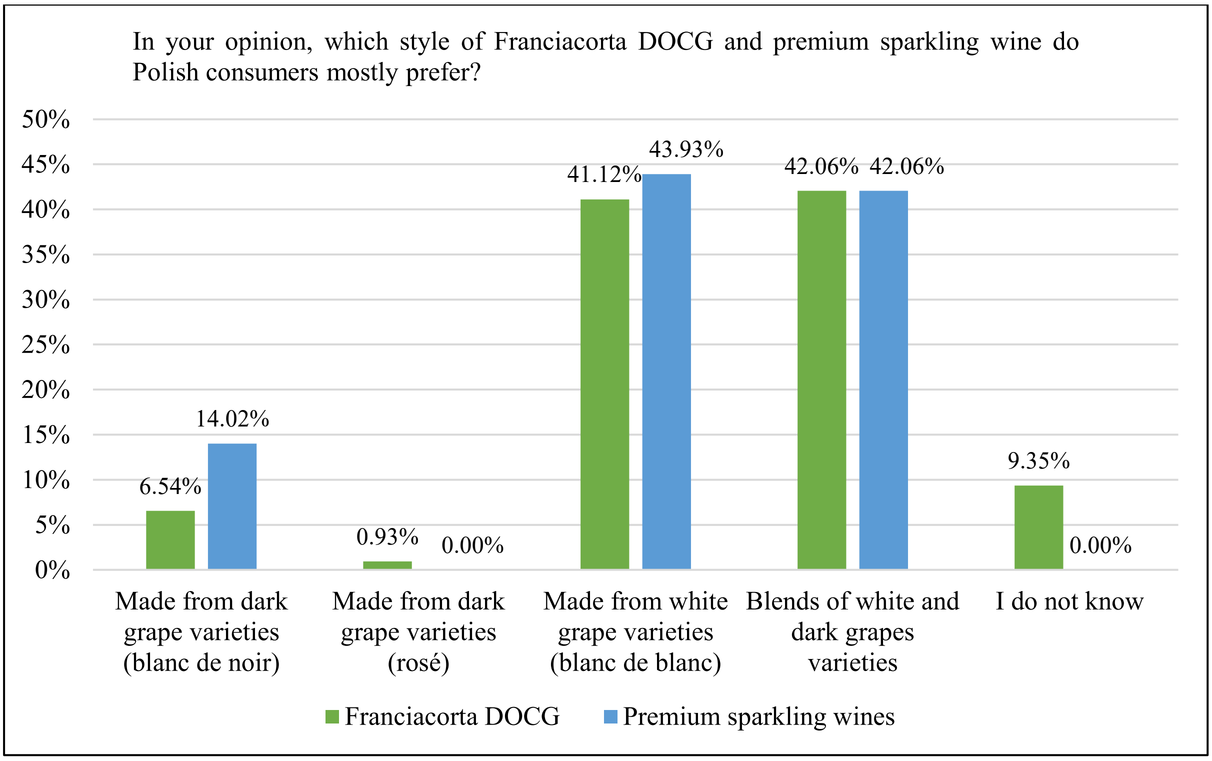
Figure 52. Use of wine web application by consumers to gather opinion or information about purchased premium sparkling wine.



Source: Own elaboration. Concluded on total sample (107). 2022

Almost all Professionals (95.33 %) agree that Polish Consumer willingly use web application to gather opinion or information about premium sparkling wines while purchasing (Figure 52).

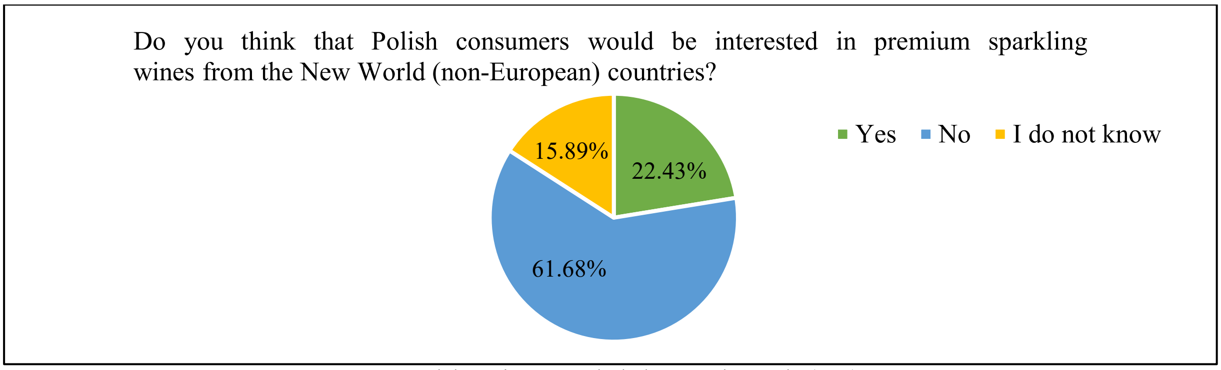
Figure 53. Style of Franciacorta DOCG and premium sparkling wines most preferred by Polish consumers - Professionals point of view.



Source: Own elaboration. Concluded on total sample (107). 2022

As it is shown on Figure 53, in Professionals opinion, Polish Consumer prefer almost equally Franciacorta DOCG and premium sparkling wines made from white grape variety and made from blends of white and dark grape varieties. As the third choice, wines made from dark grape varieties (blanc de noir) are chosen by consumers in Professionals opinion. Wines made from dark grape varieties – rosé – are at least choose by Polish consumers. 9.35 % of respondents do not know which Franciacorta DOCG style Polish consumer mostly prefer.

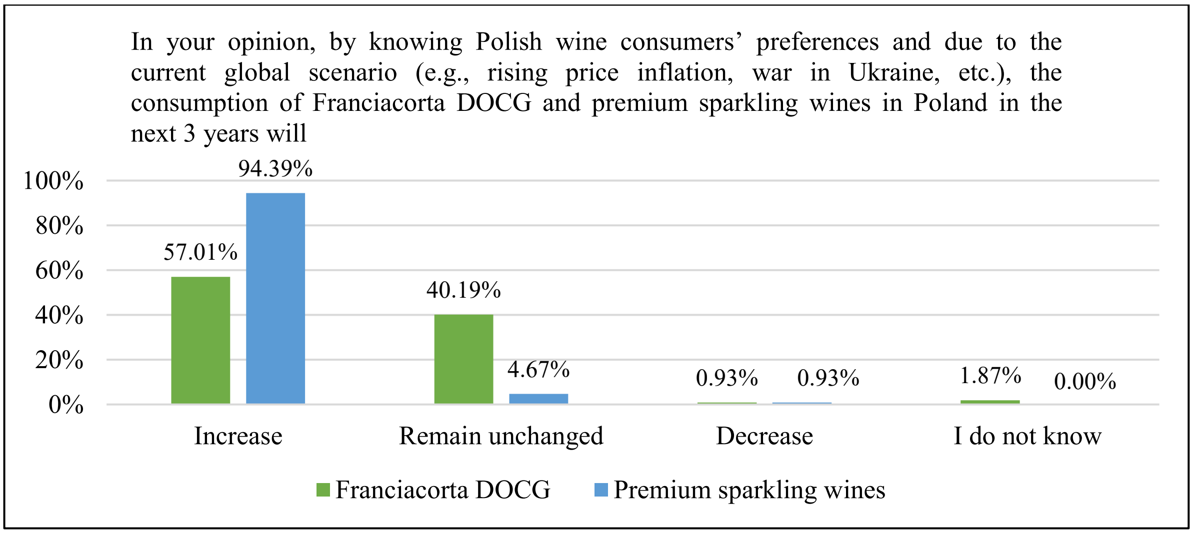
Figure 54. Polish consumer interest in premium sparkling wines from the New World – Professionals point of view.



Source: Own elaboration. Concluded on total sample (107). 2022

In accordance with Figure 54, 61.68 % of Professionals claim that Polish consumers would not be interested in premium sparkling wines from the New World. 22.43 % say the opposite, and 15.89 % of respondends do not know.

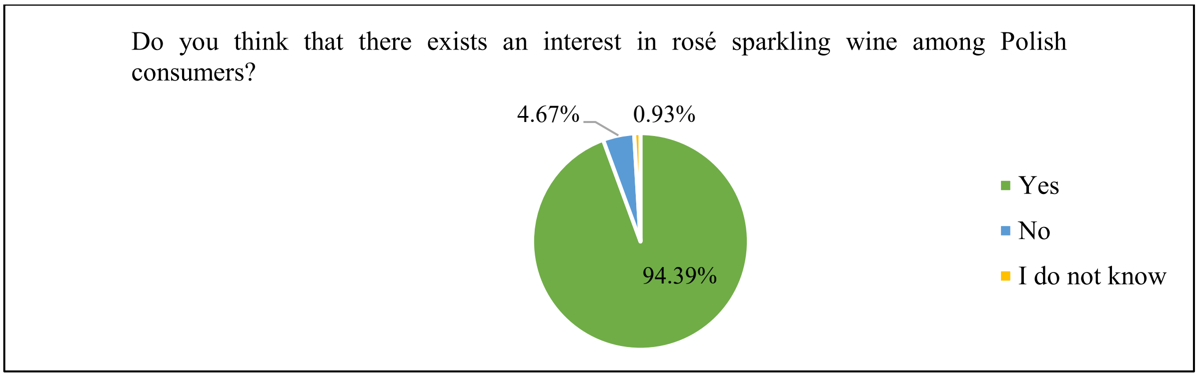
Figure 55. Forecast of Franciacorta DOCG and premium sparkling wines consumption in Poland in next three years.



Source: Own elaboration. Concluded on total sample (107). 2022

According to Professionals (Figure 55), within three years the consumption of both Franciacorta DOCG (57.01 %) and premium sparkling wines (94.39 %) will increase. 40.19 % of respondents think that Franciacorta DOCG consumption's level will remain unchanged and 4.67 % for premium sparkling wines. Only 0.93 % say that consumption of both Franciacorta DOCG and premium sparkling wines will decrease.

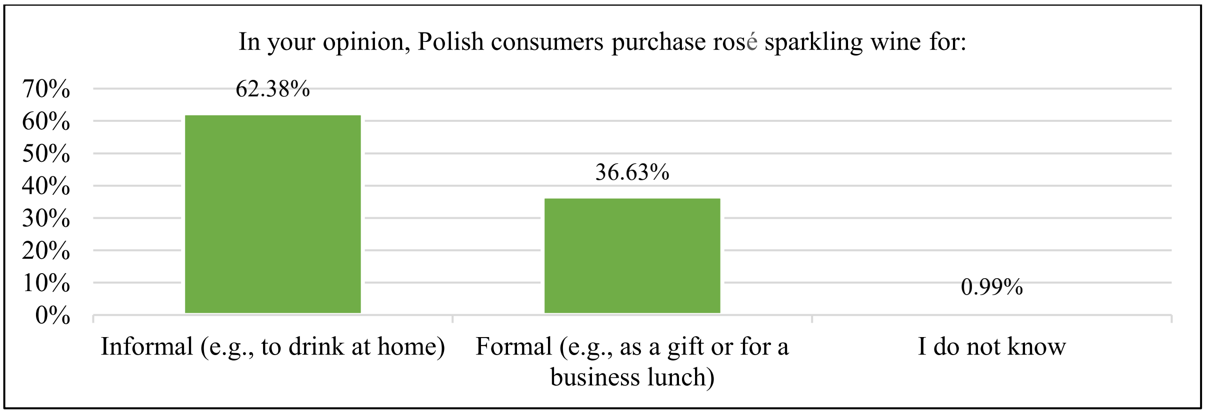
Figure 56. Polish consumer interest in rosé sparkling wine - Professionals point of view.



Source: Own elaboration. Concluded on total sample (107). 2022

In most of the Professionals' opinions (94.39 %), Polish consumers are interested in rosé sparkling wines. Only 4.67 % think that there is no interest in these wines and 0.93 % do not know what consumer preferences are (Figure 56).

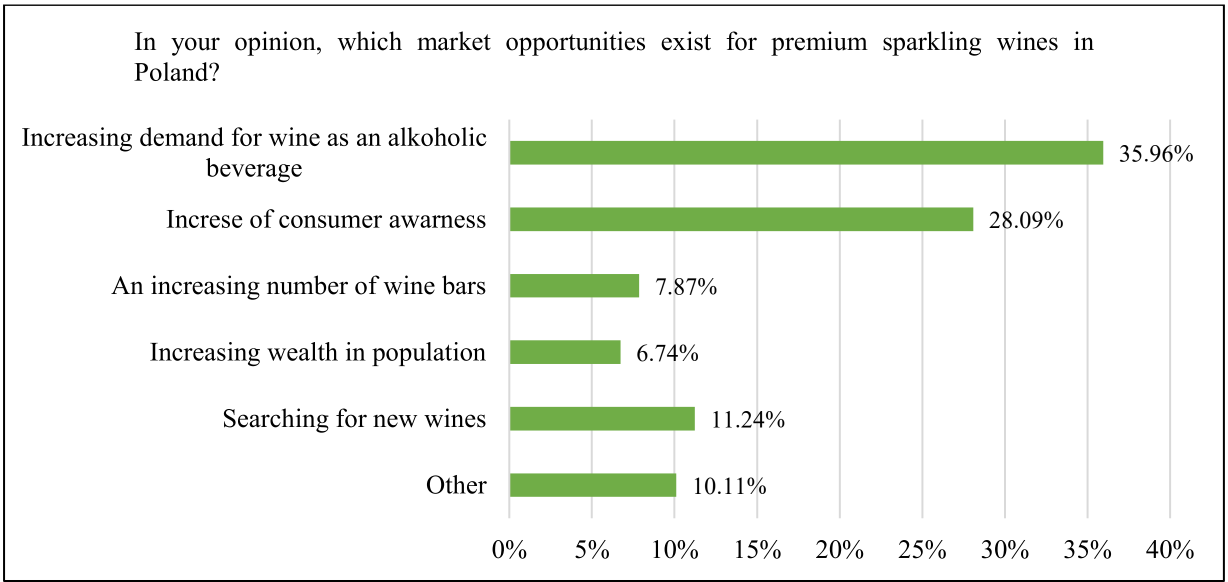
Figure 57. Purchase of rosé sparkling wines by Polish consumers according to occasion - Professionals point of view.



Source: Own elaboration. Concluded on total sample (101). 2022

62.38 % of Professionals think that Polish consumers purchase rosé sparkling wine for informal occasions. On the contrary, 36.63 % say that wine is purchased for when formal circumstances appear. Only 0.99 % of respondents do not know for which occasion Polish consumers are choosing rosé sparkling wine (Figure 57).

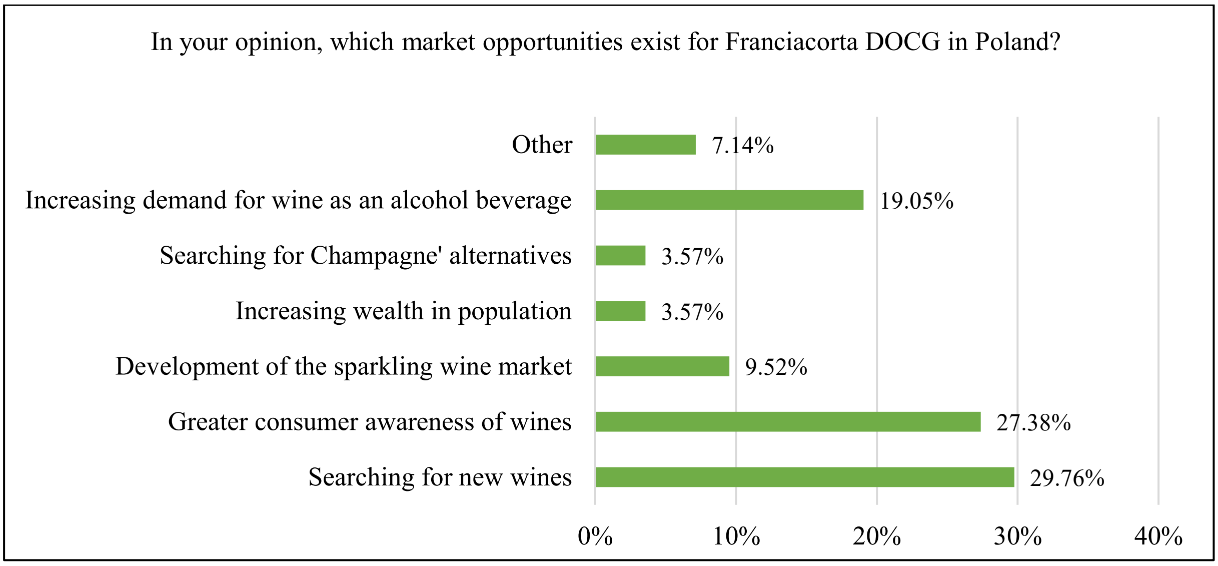
Figure 58. Professionals' opinion on market opportunities for premium sparkling wines in Poland.



Source: Own elaboration. Concluded on total sample (89). 2022

In the Professionals opinion (Figure 58), Polish consumers more and more frequently choose wine as an alcoholic drink among other alcohols (35.96 %). Changing drinking habits among Poles can be seen as a great market opportunity for the growth of premium sparkling wines in Poland. Increasing wine awareness among Polish consumers (28.09 %) can provide more conscious decisions while purchasing alcoholic drinks. In the opinion of respondents, increasing consumer awareness can lead also to searching for new wines in the Polish wine market (11.24 %). According to Professionals, another market opportunity is the constantly increasing number of emerging wine bars (7.87 %). This may indicate an increasing demand for this type of alcoholic drink. Increase in population wealth is indicated as another reason for premium sparkling wines' growth in the Polish market. For the other opportunities (10.11 %), Professionals say that in general there are big opportunities on the Polish market for premium sparkling wines and that Polish market is still a small wine market, so there are various ways to explore it.

Figure 59. Opportunities for Franciacorta DOCG on Polish wine market.

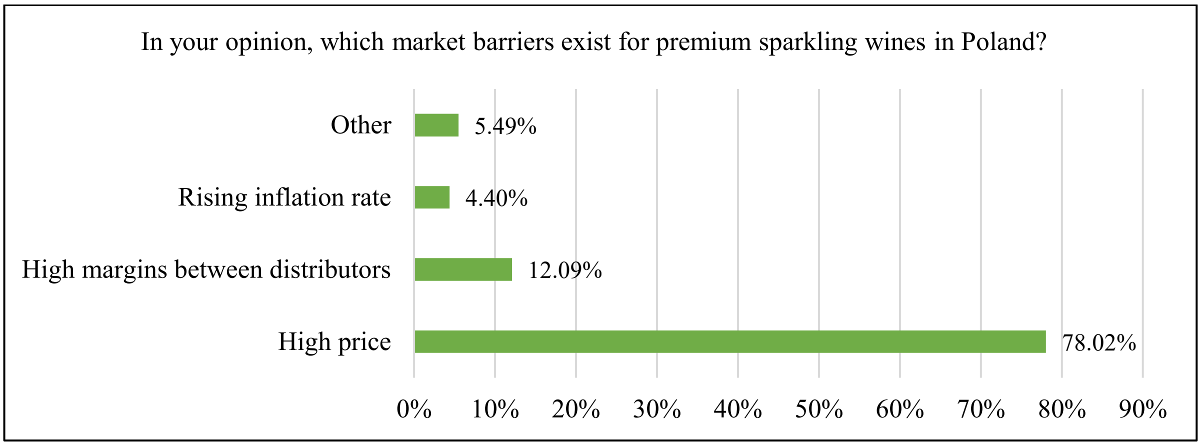


Source: Own elaboration. Concluded on total sample (84). 2022

In the case of Franciacorta DOCG, Professionals think that searching for new wines by Polish consumers (29.76 %) and their greater awareness of wine (27.38 %) are main opportunities which can opt for a growth of Franciacorta DOCG consumption in Poland. According to Professionals, similarly as for premium sparkling wines, increasing demand for wine as an alcohol beverage (19.05 %) can stand as an opportunity for Franciacorta DOCG growth in Poland. Polish wine market is still a young, underdeveloped market compared to traditional wine markets like Italy or Spain, but its development' progress (9.52 %) can be another opportunity for the Franciacorta DOCG success in Poland. 3.57 % Professionals think also that opportunities can come from the increasing wealth of Poles and their searching for Champagne's alternatives by consumers (3.57 %). For the other opportunities (7.14 %), Professionals say that there are opportunities but not so many as for premium sparkling wines in general and that each wine will always find its recipients (Figure 59).

THREATS

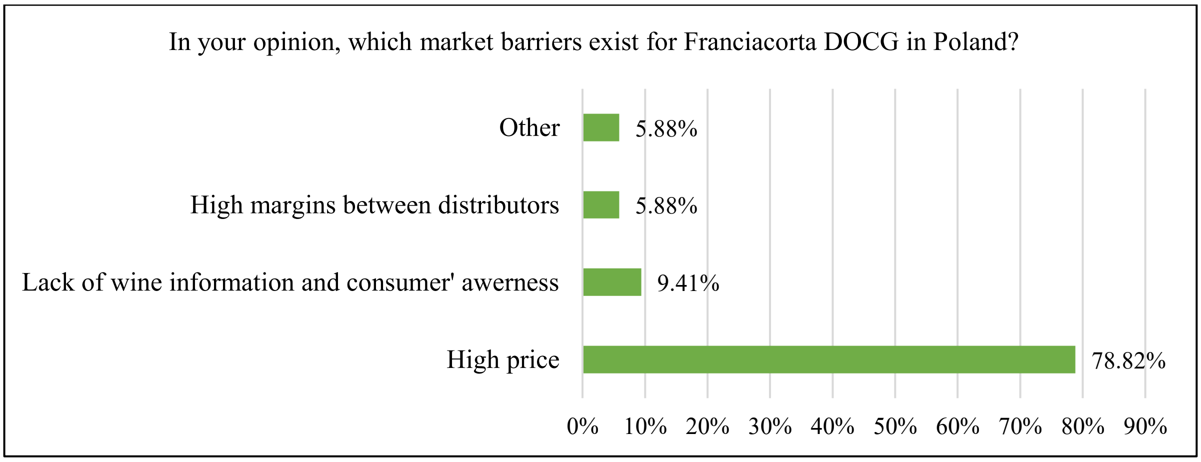
Figure 60. Professionals' opinion on market barriers for premium sparkling wines in Poland.



Source: Own elaboration. Concluded on total sample (91). 2022

One of the main market barriers for the premium sparkling wines' growth in Poland is their high prices (78.02 %). According to Professionals, high margins between distributors also influence the final wine price, which is higher if more actors are involved in wine sales (12.09 %). The economic situation in Poland, influenced by a rising inflation rate, may limit the development of premium sparkling wine market in Poland (4.40 %). Moreover, Professionals indicate other barriers (5.49 %) such as: still not well-developed Polish wine market and low consumer awareness about wines, saturation of market with big producers' concerns and cheap Prosecco (Figure 60).

Figure 61. Professionals' opinion on market barriers for Franciacorta DOCG in Poland.



Source: Own elaboration. Concluded on total sample (85). 2022

As for the premium sparkling wines, also for the Franciacorta DOCG the main market barrier stands for its high price (78.82 %). 9.41 % Professionals think that lack of Franciacorta DOCG information in the market and the low consumers' awarness about wine act as the second barrier for its development on the Polish market. The third barrier refers to high margins between distributors, which directly influence the final wine price (5.88 %). Also, Professionals (5.88 %) indicated barriers such as Prosecco and Champagne competition on Polish market (Figure 61).

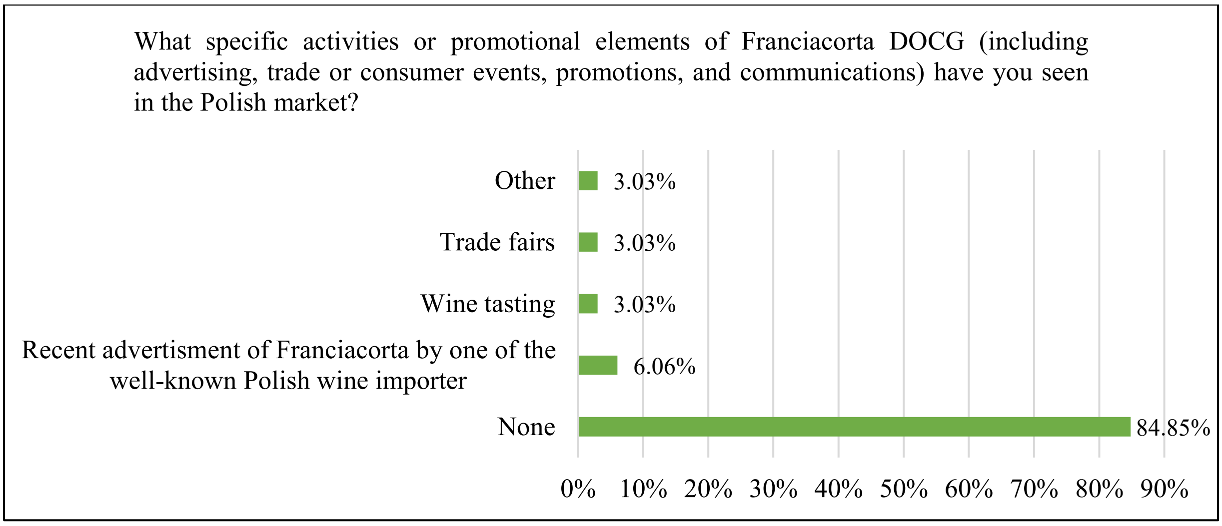
Table 16. Statements that describe Franciacorta DOCG – Professionals point of view.

Variables	N	Percentage
It is seen as affordable, and is in good distribution both on premise and off premise	1	0.93
New consumers are entering the market and choosing this type of sparkling wine	6	5.61
It is perceived as an appropriate choice for many occasions, not just celebrations	7	6.54
Most of Franciacorta DOCG sold in Poland offer a very good price/quality ratio	32	29.91
There is a general upward trend for sparkling wines which is helping Franciacorta DOCG	98	91.59
There are a few well-known brands that are driving the growth of Franciacorta DOCG	85	79.44
Well-known wine writers and critics are praising this type of sparkling wine	24	22.43
The production method is a guarantee of the quality of Franciacorta DOCG	103	96.26
The beauty of the Franciacorta landscape is appreciated by Polish consumers	2	1.87
The Franciacorta DOCG appellation has a good reputation among Polish consumers	19	17.76

Source: Own elaboration. Concluded on total sample (107). 2022.

According to Professionals (Table 16), the production method of Franciacorta DOCG guarantees its quality (96.26 %). General upward trend for sparkling wines helps Franciacorta DOCG with growth on market (91.59 %) as well as the existence of a few well-known brands which also guarantee its growth (79.44 %). Professionals think that the rest of the statements do not relate much to the Franciacorta DOCG wine.

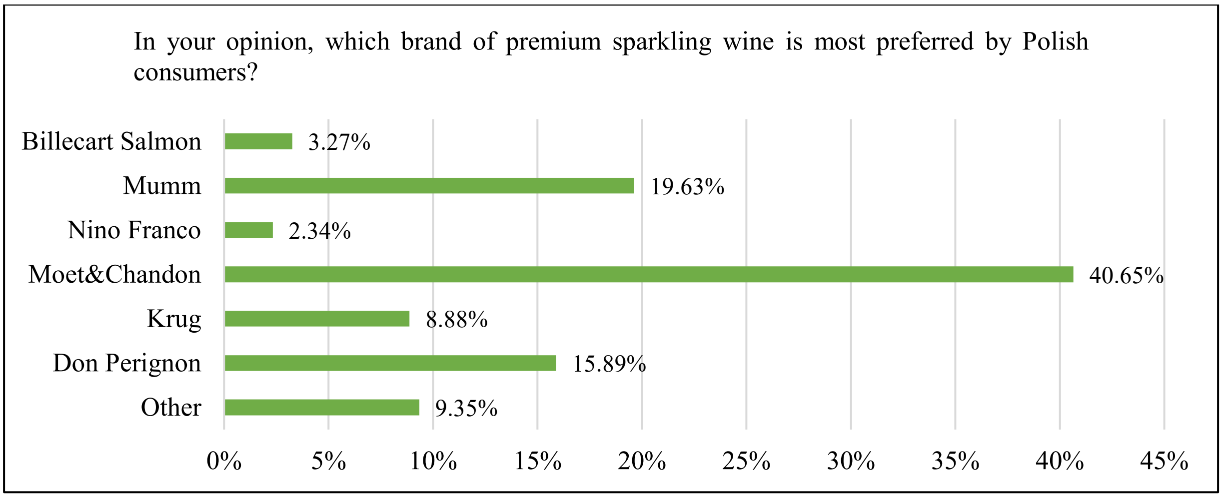
Figure 62. Activities or promotional elements of Franciacorta DOCG seen recently in the Polish market by Professionals.



Source: Own elaboration. Concluded on total sample (99). 2022

As shown in Figure 62, 84.85 % Professionals have not seen any activities or promotional element for Franciacorta DOCG in the Polish market. 6.06 % declare they saw advertisements of this wine from well-known Polish wine importer. 3.03 % have spotted wine via wine tasting, trade fairs or in other sources like on YouTube or in wine articles on Polish websites.

Figure 63. Premium sparkling wine brands most preferred by Polish consumers - Professionals point of view.



Source: Own elaboration. Concluded on total sample (214). 2022

Referring to Figure 63, in the Professesionals' opinion, Polish consumers associate premium spakrling wines only with Champagnes. Moet & Chandon (40.65 %) is the most easily recognised premium sparkling wine brand in the Polish market. Along with Mumm (19.63 %) brand that are available in each supermarket, which make them easy recognisiable by Polish consumers. Don Perignon (15.89 %) is the third brand preffered by Poles. Its average price in the market is much higher than the two prevoius brands, which can make this brand less reachable for most consumers. Next, Professionals indicate brands like Krug (8.88 %), Billecart Salmon (3.27 %) and Nino Franco (2.34 %). 9.35 % ofrespondents suggested type of premium spakrling wines instead of brands.

Table 17. Importance of premium sparkling wines features while purchased by Polish consumer – Professionals point of view (1 – not at all important, 7 – very important).

Variables	**N**	**Mean**
Price	107	6.53
Method of production	107	5.73
Origin	107	5.89
Appellation	107	4.15
Vintage	107	4.36
Trusted brand	107	6.37
Organic/biodynamic/vegan wine	107	3.63

Source: Own elaboration. Concluded on total sample (107). 2022.

As claimed by Professionals (Table 17), the price of premium sparkling wines is the most important features while purchasing for Polish consumers (6.53). Trusted brands stand for the second most important factor (6.37). Then, we find wine origin (5.89), method of production (5.73), vintage (4.36), appellation (4.15) and the least important is if the wine is organic/biodynamic or vegan (3.63).

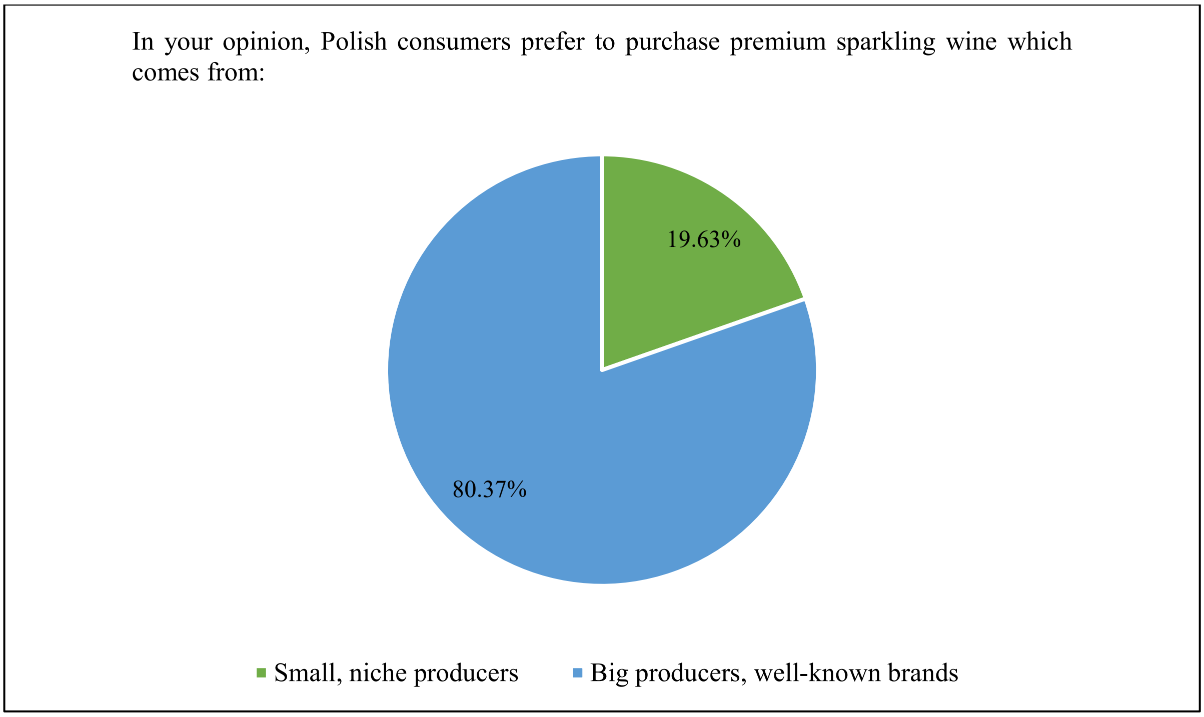
Table 18. Sensory quality of the following premium sparkling wines that Polish consumers assign reputation to (1 - very low; 7 - very high).

Variables	N	Mean
Champagne	107	6.93
Franciacorta	107	5.90
Trento	107	5.60

Source: Own elaboration. Concluded on total sample (107). 2022.

According to Professionals (Table 18), Polish consumers assign a very high reputation to sensory quality for Champagne (6.93), followed by Franciacorta DOCG (5.90). Trento has received the lowest rate, but still its quality is scored as high (5.60).

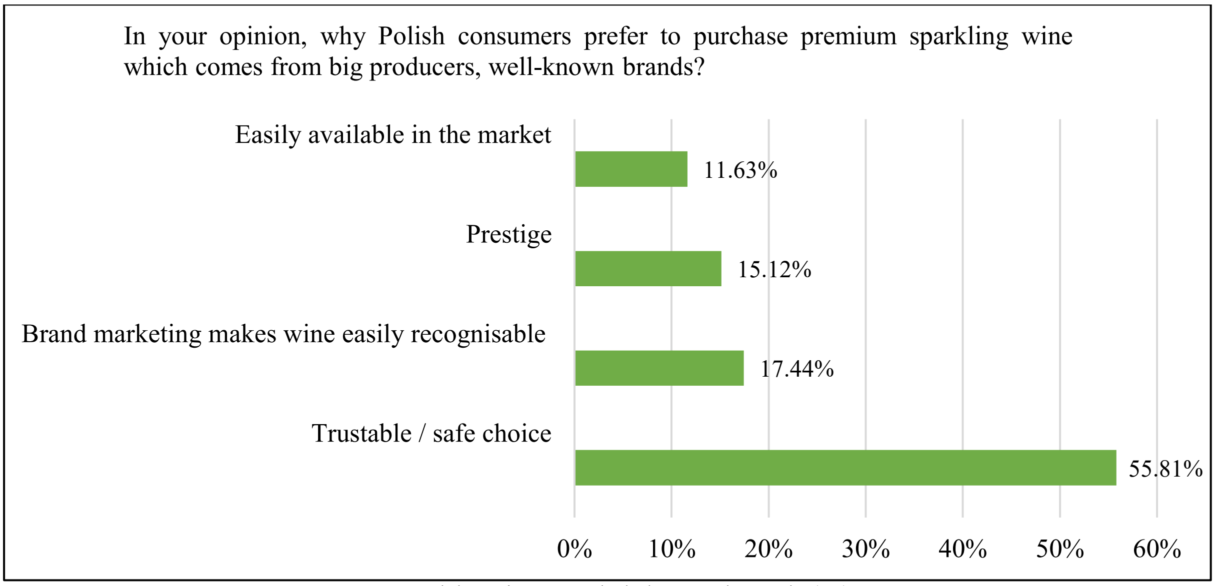
Figure 64. Well-known producers or niche one. Polish consumer preferences by Professional point of view.



Source: Own elaboration. Concluded on total sample (107). 2022

In accordance with Professionals' answers, Polish Consumer is more likely to choose premium sparkling wine which comes from big, well-known producers (80.37 %). Only 19.63 % say that small, niche wine producers are preferred by Consumers (Figure 64).

Figure 65. Reasons of purchasing premium sparkling wines by Polish Consumer from well-known producers - Professionals point of view.



Source: Own elaboration. Concluded on total sample (86). 2022.

In Professionals opinion (Figure 65), well-known premium sparkling wine brands are being purchased more frequently than niche one, because they are seen as trustable and a safe choice for Consumers (55.81 %). Well-known producers ensure Consumer on wine' quality and its taste, which is acceptable by majority. Brand marketing is highlighted as the second reason of purchasing wines from well-known producers (17.44 %). In the Professionals opinion, marketing act as a booster to enhance premium wine sales and can help to gain trust among new consumers. Prestige stands for third reason (15.12 %). According to Professionals, Polish market is dominated by strong and recognizable brands and the prestige acts as indicator of high wine quality. 11.63 % of respondents think that high availability of well-known brands in Polish market can opt for consumer choice while purchasing premium sparkling wine.

6.3 Developing a strategy approach for Franciacorta DOCG on the Polish wine market

The SWOT analysis shown below (Table 19) synthesises the information from the previous two SWOT analyses (the one for wine Professionals and the one for Consumers in Poland) and the information from the overall work. It then identifies the most significant strengths, weaknesses, opportunities and threats for Franciacorta DOCG and premium sparkling wine on the Polish wine market.

Table 19. SWOT analysis – summarize of all results.

Strengths	**Weaknesses**
➢ Half of consumers know and tried Franciacorta DOCG and they appreciate its sensory and organoleptic characteristics **[C]** ➢ Price of Franciacorta DOCG seems to be correct and convenient for Poles **[C, P]** ➢ Franciacorta DOCG is good for a gift or a special occasion **[C]** ➢ Tasting events and seminars with Franciacorta DOCG representatives can effectively increase the awareness among consumers and wine Professionals (who appreciate its sensory and organoleptic characteristics) **[C, P]**	➢ Difficult to find/buy Franciacorta DOCG in Poland and to access information about it **[C, P]** ➢ Lack of Franciacorta DOCG marketing and promotion **[C, P]** ➢ Polish wine business partners do not know if and how Franciacorta DOCG suppliers offer support to Franciacorta DOCG import to Poland **[P]**
Opportunities	Threats
➢ There is a developing market for premium sparkling wines in Poland, due to the growth in GDP **[P]** ➢ Polish consumers' willingness to pay more for a product with high quality and exclusivity **[C]** ➢ It is easy to access information about premium sparkling wines in Poland and they are highly available on the market **[P]** ➢ Polish consumers are willing to use wine' applications to gather more information about wine **[P]** ➢ Poles mostly prefer the white style for premium sparkling wines **[P]** ➢ Changing Poles preferences for wine dryness **[C, P]** ➢ Polish consumers spend more money on wines than in the past **[C]** ➢ Premium sparkling wines from Old World are of interest for Poles **[P]** ➢ There is interest in rosé sparkling wine among Polish consumers **[P]** ➢ Increase in demand of premium sparkling wine and consumers' awareness **[P]** ➢ Growth of wine drinking culture in Poland **[C]** ➢ It is forecasted that the consumption of premium sparkling wines and Franciacorta DOCG will increase **[C, P]** ➢ Consumers want to know more about Franciacorta DOCG **[C]** ➢ Promotion strategies can increase Franciacorta DOCG's consumption **[C]**	➢ Maximum willingness to pay for Franciacorta DOCG (0.75 l bottle) is most frequently PLN100 (21€), as for sparkling wines in general **[C]** ➢ Null promotion of Franciacorta DOCG in the Polish market **[P]** ➢ Lack of Franciacorta DOCG availability in Poland **[P]** ➢ Champagne is the most preferred premium sparkling wine by Poles **[P]** ➢ It is forecasted that Prosecco could be the most successful sparkling wine on the Polish market in next 3 years **[C]** ➢ Polish consumers prefer purchasing sparkling wines from well-known producers (brands) **[P]**

Source*:* Own elaboration, 2022. [C] - factors derive from the Consumer' survey; [P] - factors derive from the Professionals' survey

Polish consumers who got the chance to experience Franciacorta DOCG praised the wine' sensory and organoleptic qualities. They are aware of the wine' features that affect the price of Franciacorta DOCG that is considered correct. Additionally, Poles consider this wine a good choice for a gift or for consumption on special occasions. Consumers and Professionals indicate a desire to learn more about Franciacorta DOCG thorough wine tastings with the wine representatives, which they believe would be an effective strategy for increasing Franciacorta DOCG's awareness among Poles. Due to the weaknesses of the Polish wine market, Franciacorta DOCG is not widely promoted in the Polish wine market. The lack of information on and promotion of this wine in Poland also contributes to Poles' ignorance about Franciacorta DOCG. Furthermore, professionals are unaware of any support from Franciacorta DOCG suppliers. Despite the weaknesses of the Polish wine market, Franciacorta DOCG and premium sparkling wines show a potential there. Poland can be considered as a wine market with many prospects for importing wine from countries with a strong wine tradition, who are seeking to increase their wines in new markets. Poland is also one of the Eastern European countries with the quickest economic growth, thus its citizens have more financial prospects and are more prepared to spend more money on fine wine, than in the past. Nowadays, Polish consumers can readily find premium sparkling wines on the market, and they voluntarily utilise wine applications to learn more about them. They generally buy wine from supermarkets, but specialty stores and wine bars are becoming more popular. In Poland, white, dry, premium sparkling wines are in high demand. Even though only women buy rosé premium sparkling wine, there is demand in this wine style in the country. Due to Poland's expanding wine culture, premium sparkling wines are more in demand on the country' wine market. As a result, it is anticipated that demand for Franciacorta DOCG and premium sparkling wines will continue to rise. Additionally, Poles indicate a willingness to learn more about Franciacorta DOCG. Unfortunately, there are various risks that could slow the expansion of Franciacorta DOCG and other premium sparkling wines in Poland. Nowadays, maximum willingness to pay for sparkling wines in general is PLN100 (21€), whereas the average price of premium sparkling wines in Poland starts from PLN160 (34€). Another problem that affects Franciacorta DOCG is the lack of wine promotion and availability on the Polish wine market, where Prosecco in the most popular among sparkling wines. The most preferred premium sparkling wine among Poles is Champagne, making it Franciacorta DOCG's main rival on the Polish wine market. The Prosecco phenomenon may pose a threat to the expansion of Franciacorta DOCG in Poland if it is unable to establish its reputation as a premium sparkling wine (given that it is mostly unknown on the Polish wine market). On the contrary, if the Prosecco phenomenon persists, it may present a growth opportunity for sparkling wines in general, including more expensive premium sparkling wines like Franciacorta DOCG. Polish consumers prefer to buy fine sparkling wines from reputable producers because of their reputation and assurance of the wine quality.

A Threats, Opportunities, Weaknesses, Strengths (TOWS) matrix was developed using the findings from the SWOT analyses (Table 19) and insights collected from the theoretical part of the thesis. Hence, this provided the opportunity to discuss possible strategies for the growth of Franciacorta DOCG and premium sparkling wines on the Polish market.

STRENGTHS – OPPORTUNITIES STRATEGY (MAXI-MAXI)

Steady growth of economy and Gross Domestic Product per capita (7.3 % of annual growth, The World Bank, 2021) makes Poland one of the European countries with the fastest economic growth rates, which is also gaining power inside the EU (Aswani, 2021). Increasing Poles' wealth and rising health consciousness influence the consumer point of view in the case of choosing which alcohol type to drink. Poles more frequently are choosing wines instead of high-volume alcohols (Schaefer *et al*., 2018). Increasing wealth influences also Polish consumers' willingness to pay more for products which are distinguished by quality and exclusivity (premiumization trend). According to respondents in the survey, wine origin, the traditional method of production and the geographical indication, which stand as added value to the product, are the most important features of premium sparkling wine (Table 17). The cost of Franciacorta DOCG seemed to be correct and convenient for the investigated respondents, so it is important to highlight Franciacorta DOCG attributes, which is considered a premium sparkling wine by Poles. Increased consumers awareness about wines also lead to growth of wine drinking culture. White style of premium sparkling wines and Franciacorta DOCG are particularly popular among Poles. To promote interest and encourage consumers to explore unknown sparkling premium wine style, the marketing approach may focus on advertising various wine styles as a chosen luxury line for special occasions (71 % of consumers would like to present Franciacorta DOCG as a gift for special occasion, Figure 19). Polish consumers would like to purchase Franciacorta DOCG in supermarkets and specialised shops. In 2021, three main retailers were chosen by Poles to buy a wine are: Biedronka, Lidl and Kaufland (Wine Intelligence, 2021). In the case of supermarkets, well-known producers of Franciacorta DOCG as Berlucchi, Bellavista, Ca 'del Bosco or Barone Pizzini (available on the Polish market since 2022) are supposed to be highly available on stores' shelves and build a brand image. The wine from smaller, niche producers, due to their limited production capacity, could be sold to specialised shops and via on-premises channel distribution to provide consumers a greater sense of exclusivity and of greater producer selection.

Sensory and organoleptic features of Franciacorta DOCG are appreciated by Polish consumers. Combining wine tasting and seminars with Producers, or their representatives where Poles can gain direct information about wine, could be promotional activities which could increase consumer awareness about this wine. Other promotion activities can involve Internet sources to boost premium sparkling wines' consumption. According to our survey, Polish consumers would like to use social media to gather information about premium sparkling wines and Franciacorta DOCG (Figure 28).

STRENGTHS – THREATS STRATEGY (MAXI-MINI)

Premiumization trend in Poland has been growing in the past years, but nowadays – in the post pandemic time - it is even more noticeable. Poles declare their preferences to purchase premium sparkling wines mainly for special occasion. Charters *et al*., (2011) also highlighted the importance of the separation of sparkling wine form still wine, because it is thought to be a unique and distinct beverage. There is, however, room to increase the variety and quantity of "special occasions" such as popping open a bottle of Franciacorta DOCG to celebrate the end of workweek or starting a new family tradition of having Franciacorta DOCG on Sunday dinner. Well-known premium sparkling wines' producers are desired by Poles. Due to their reputation, consumers feel a greater sense of security and certainty while purchasing these wines. To gain recognizability, producers of Franciacorta DOCG are supposed to create promotion activities, which will help to gain consumers curiosity, interest, and make wines easily recognisable in the Polish wine market. Wine tastings provide consumers direct information about wine, its quality, origin, pricing differences compared to other premium sparkling wines. Champagne is considered a major competitor of Franciacorta DOCG on the Polish wine market. Poles would have the opportunity to learn more about the wine. Acqua Panna or S. Pellegrino could support Franciacorta DOCG while wine tastings as a cooperation partners. Also gifts or food-wine pairing sets could be created in cooperation with Parmigiano Reggiano (a cheese well-known brand in Poland) and Calvisius caviar. Franciacorta DOCG could also benefit from Prosecco phenomenon on the Polish wine market, highlighting wine origin as another Italian sparkling wine.

WEAKNESSES – OPPORTUNITIES STRATEGY (MINI-MAXI)

Polish consumers' wine awareness is rising constantly. Changing within drinking patterns generates an increasing demand of new wines. Poles are more frequently searching information using web application or via social media. Thus, marketing strategy can be provide via these channels, for instance campaigns on Instargram platforms with well-known wine influencers. The wine awareness' barrier for Poles may be lowered by the availability of Franciacorta DOCG and premium sparkling wines by the glass (e.g., Fridays evenings with premium wines in a wine bars or restaurants). Each bottle of Franciacorta DOCG on the Polish wine market is supposed to contain a QR code, which will provide consumers with precise information about the wine. According to Sillani *et al.,* (2017) the QR code provides graphics, which as language of images is a highly potent quality the raises the expected value of the goods. Rosé premium sparkling wines are mainly consumed by women. There are advertisements that portray it as the drink of choice for girls' night out and as a wonderful present for a female friend. Similar to what some Champagne firms are already doing, Franciacorta DOCG marketers may increase their efforts to encourage men to purchase the wine for their significant others on holidays, birthdays, anniversaries or Valentine's Day (Charters *et al*., 2011).

WEAKNESSES – THREATS STRATEGY (MINI-MINI)

The strategy that could be implemented for Franciacorta DOCG would be to cooperate with Prosecco and create a strong bond among Italian sparkling wines abroad. Also, creating gift boxes of Italian wines, where the overall price would cover higher price of Franciacorta DOCG. After Covid, Polish wine drinkers put a higher priority on trying new alcohol beverages and buying higher-quality wines for themselves. This can be an opportunity for Franciacorta DOCG on the Polish wine market as a new wine with high quality. Long-term plans would be invitations for Franciacorta DOCG producers or the wine' representatives, to wine events like ENOEXPO or Confetti Wine Fest. As a result, professionals would have the chance to discuss the Franciacorta DOCG position on the Polish wine market.

7. Chapter 7.

Conclusion

The current study attempted to determine the characteristics of premium sparkling wines Polish consumers value when choosing a wine. The second aim of the thesis was to shed light on the Franciacorta DOCG's commercial potential on the Polish wine market. Two surveys were used to collect qualitative data for this work: the first among Polish wine buyers and the second among Polish wine industry professionals. This thesis has demonstrated that sparkling wine's price, origin, trusted brand, and method of production are key features of sparkling wines that matter to Polish consumers while purchasing. Also, the thesis evaluated the position of Franciacorta DOCG on the Polish wine market. Although there is a great commercial potential for Franciacorta DOCG in Poland, there is still need to develop strategies to assist this wine's distribution on the Polish wine market. Through SWOT analyses built on data gathered from wine consumers and professionals in Poland, a strategic framework known as the TOWS matrix has been established and four strategies for improving the Franciacorta DOCG positioning on the Polish wine market were developed.

The main strength in the Polish wine market is the steady growth of Poland' economy and gross domestic product per capita. Thus, Poles are becoming wealthier, and they are willing to pay more for goods that are distinctive for their excellence and exclusivity such as premium sparkling wines and the Franciacorta DOCG. There are a few weaknesses in the Polish wine market, primarily a result of poor availability, marketing, and knowledge about Franciacorta DOCG among Poles. Despite not being widely known in the Polish wine market, the wine shows a great development potential. Indeed, Poles who have never tried Franciacorta DOCG expressed desire to taking part in wine tastings and to learn more about this wine. Growing demand for novel, unknown wines has also grown along with a greater consumers' interest in wines and growth of wine drinking culture in Poland. However, the strong competition of Champagne on the Polish wine market is the main issues that Franciacorta DOCG must fight against.

To increase Franciacorta DOCG' commercial potential on the Polish wine market, hence in making strategic choices, *the* s*trengths-opportunities strategy* is the one this premium sparkling wine's representatives and producers should implement first. The *Strengths-Opportunities strategy* focuses on highlighting Franciacorta DOCG attributes such as: origin, as the premium sparkling wines from Italy are of interest for Poles, the wine is produced using the Metodo Classico, which is the same method of production like for Champagne, namely the most preferred premium sparkling wine among Poles. Hence, this strategy starts with some very relevant strengths of Franciacorta DOCG, such as its price, which is considered fair, the appreciation of its organoleptic and sensory characteristics by Polish consumers, and the fact that they consider Franciacorta DOCG a wine suitable for special occasions. Opportunities come from the positive outlook for premium sparkling wines in Poland, where consumers are willing to pay more for wines than in the past and for a quality and exclusive product such as Franciacorta DOCG. Considering the positive trend of Champagne imports in Poland and the clear preference of Polish consumers for Champagne as a premium sparkling wine, it follows that this product represents the major competitor and therefore a possible threat to the development of a market for Franciacorta DOCG in Poland. Therefore, the importance of actions that allow Franciacorta DOCG to create a strong image that differentiates it from Champagne emerges. Among the possible actions, strengthening the market relationships and social network surrounding of the wine and choosing promotional activities which will facilitate consumers' understanding of Franciacorta DOCG wine are needed. Additionally, because the Polish market for Franciacorta DOCG is currently underdeveloped, the marketing of the wine should begin with a market segmentation and targeting before differentiating Franciacorta DOCG form Champagne, for example with tenacious promotional techniques. To increase awareness of Franciacorta DOCG among Poles, its availability should also be boosted. Another point is a need to develop Franciacorta DOCG tastings, seminars with Producers or their representatives, which would be a good chance to try the wine by potential customers.

Also, *the strengths-threats,— weaknesses-opportunities* and the *weaknesses-threats* strategies create contingency plans, that act as an assurance in the case of unexpected contingencies.

This study demonstrates that Franciacorta DOCG is not well known within Poles, but there is a room to develop its position on the Polish wine market with efforts from both sides – wine' producers and representatives to provide more direct knowledge of the product to professionals from the Polish wine industry, who are primarily responsible for providing product and knowledge to consumers.

7.1 Limitations and future research

The small geographic scope of this study is one of its limitations (mainly Cracow city). Additionally, the strategies for Franciacorta DOCG that were created for the Polish wine market may not necessarily work in other non-traditional wine countries. Further research could explore Franciacorta DOCG producers and stakeholders' point of view, in the case of exporting the wine abroad. This work can be expanded also by adding sensory evaluation of the Franciacorta DOCG in the analysis.

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Appendices A.

Franciacorta area of production

Article 3 from Product Specification of Franciacorta DOCG published 17th of June 2017 on the MiPAAF official website according to Quality and Safety Section PDO and PGI contain detailed information about area of grapes production for Franciacorta DOCG, which are presented below.

“The production area of the grapes grown to make controlled and guaranteed designation "Franciacorta" wine is fully included in the Province of Brescia; it covers land suitable for producing high quality wine in the entire territory of the municipalities of Paratico, Capriolo, Adro, Erbusco, Cortefranca, Iseo, Ome, Monticelli Brusati, Rodengo Saiano, Paderno Franciacorta, Passirano, Provaglio d’Iseo, Cellatica and Gussago, as well as the part of the territory of the municipalities of Cologne, Coccaglio, Rovato and Cazzago S. Martino located north of the former A-roads no. 573 and no. 11 and part of the territory of the municipality of Brescia. The area is demarcated as follows: From the banks of Lake Iseo along the border of the municipality of Paratico to the border of the municipality of Capriolo and on to that of Adro. It then follows the border of Adro southwards to the border of the municipality of Erbusco, which it follows southwards past the intersection with the municipality of Cologne, continuing on to the south until it reaches the A-road connecting Bergamo to Brescia, which it follows to the intersection with the municipality of Ospitaletto. It then follows the border of this municipality further north until it reaches the border of the municipality of Castegnato, proceeding all the way to former A-road no. 11, which it follows eastwards running through the hamlet of Mandolossa and on to the hamlet called Scuole. From here, it coincides with the northbound road going to the Badia to an elevation of 133 m asl, then follows the road running along with the Sant'Anna hill to the east and heading northeast, climbing to these elevations: 136.9- 138.8-140.2-150-160-157.9, until it meets up with the road from Brescia to Cellatica, which it follows towards Cellatica. From 139,9 m asl, the area is delimited first by the municipal border of Cellatica, then by Gussago's, encompassing the entire territory of both of the aforesaid townships. It then follows the border of the municipality of Brione, then that of Polaveno up to Lake Iseo, where it follows the shore to Paratico. The production area identified above does not include the following: From the western border of the Province on Brescia, near Motorway A4 and the Oglio river, where the municipal borders of Palazzolo sull’Oglio and Capriolo converge, it follows the border of the municipality of Capriolo until it crosses the railroad tracks, with which it coincides running northwards to the station of Paratico, then it follows former A-road no. 469, B-road no. 12 to the village of Clusane, at an elevation of 193.8 m asl. Non including all the territory of Villa Barcella, it runs at an elevation of 205 m and crosses B-road no. 12 again at 197 m. It then follows B-road no. 12 to an elevation of 191 m asl, leaving out the Cascina Beloardo hill, running through these elevations: 189.9-188-195.2. It crosses southbound B-road no. 11 to the Church of San Pietro at Lamosa, where it follows the dirt road to Segaboli, then climbs to 192.3-189.5-187.5-198 and continues towards Il Mulino, the railway station of Provaglio, after which it coincides with the northbound tracks until, before the village of Iseo, it reaches the former A-road no. 510, which it follows to the municipal border of Sulzano and runs along it northwards to the lake. Then it follows the shore of Lake Iseo to Paratico, where, near Sarnico, it reaches the border of the Province of Brescia and follows it back to the starting point in the municipality of Capriolo."

Appendices B.

Consumer questionnaire

1. Gender.
2. Age.
3. Residence location.
4. Eductaion.
5. What is your monthly household income?
6. Please, indicate your level of agreement with the following opinions, using a scale from 1 to 7 (1- strongly disagree; 7 - strongly agree):
7. How frequently do you drink sparkling wine?
8. How frequently do you buy sparkling wine?
9. Where do you buy sparkling wine more frequently?
10. Which price did you paid for the last bottle of sparkling wine (0,75l) that you bought?
11. Write if you remember the exact price of this bottle.
12. What type of sparkling wine you usually choose?
13. Which degree of dryness in sparkling wine suits you best?
14. Do you know Franciacorta DOCG, Italian sparkling wine?
15. If YES, how did you find out about this wine?
16. Please, add three words that reminds you to Franciacorta DOCG.
17. Do you know which method Franciacorta DOCG is produced?
18. Do you know in which Italian region Franciacorta DOCG is produced?
19. In your opinion, the price of a bottle (0,75l) of Franciacorta DOCG is.
20. In your opinion, how much should a 0.75l bottle of Franciacorta DOCG cost?
21. Would you like to know more about this wine?
22. If YES, through which channel of communication?
23. Have you ever tried Franciacorta DOCG?
24. If NO, would you like to participate in Franciacorta DOCG tasting?
25. Thinking about Franciacorta DOCG wine, what do you like best about this wine?
26. Thinking about Franciacorta DOCG wine, what do you like least, or would you change?
27. Would you give a bottle of Franciacorta DOCG as a gift for a special occasion (friends' birthday, family party, business dinner, etc.)?
28. If YES, why?
29. If NO, why?
30. Would you recommend a friend to include Franciacorta DOCG in her/his sparkling wines of choice?
31. When you feel like buying a bottle of Franciacorta DOCG, can you find/buy it easily?
32. If YES, where do you buy it?
33. If NO, where would you like to buy it?
34. In your opinion, is it easy to access information on Franciacorta DOCG in Poland?
35. If NO, why you think is that?
36. Do you think that consumption of Franciacorta DOCG would increase in Poland if there was more promotion about this wine?
37. In your opinion, which promotion tool or strategy could be more effective to boost its knowledge and consumption among Polish consumers?
38. In your opinion, sparkling consumption in Poland in the next three years is set to.
39. Why you think is that?

40. In your opinion, which of the following sparkling wines do you think will be most successful in Poland in the next three years?
41. In your opinion, Franciacorta DOCG consumption in Poland in the next three years is set to.
42. Why you think is that?

Appendices C.

Professionals questionnaire

1. Gender.
2. Age.
3. Residence location.
4. Education.
5. What is your monthly household income?
6. Please, indicate your industry tier.
7. Do you think premium sparkling wines registered a growth in the Polish market during the last 5 years?
8. If YES, what degree of importance, if any, do you attach to the following factors as drivers of the continuous growth of premium sparkling wines in Poland?
9. In your opinion, which is the preferred production method for sparkling wines for Polish consumers?
10. In your opinion, which style of premium sparkling wine do Polish consumers mostly prefer?
11. In your opinion, Polish consumers prefer to purchase premium sparkling wine which comes from.
12. Why?
13. In your opinion, which brand of premium sparkling wine is most preferred by Polish consumers?
14. Please, write second brand of premium sparkling wine**,** which in your opinion is most preferred by Polish consumers?
15. In your opinion, which of the following premium sparkling wine do Polish consumers prefer drinking when they are in a wine bar/at the restaurant? (Choose max 2)
16. In your opinion, which of the following premium sparkling wine do Polish consumers prefer drinking when they are at home or at a friend or family member's house? (Choose max 2)
17. In your opinion, is it easy for consumers to find/buy premium sparkling wine in Poland?
18. If YES, where they can find/buy premium sparkling wines most easily?
19. If NO, where should they find/buy sparkling wines more easily?
20. In your opinion, in Poland who prefer buying the following premium sparkling wines.
21. In your opinion, is it common for Polish consumers to use web application to gather opinions/information when buying premium sparkling wine? (Vivino)
22. In your opinion, is it easy for consumers to access information on premium sparkling wines in Poland?
23. If YES, why/how?
24. If NO, why?
25. Do you think that Polish consumers would be interested in premium sparkling wines from the New World (non-European) countries?
26. In your opinion, which are the most important features of premium sparkling wine for Polish consumers when buying?
27. In your opinion, which is the reputation - in terms of sensory quality – that Polish consumers assign to the following premium sparkling wines?
28. In your opinion, by knowing Polish wine consumers' preferences and due to the current global scenario (e.g., rising price inflation, war in Ukraine, etc.), the consumption of premium sparkling wines in Poland in the next 3 years will.

29. Thinking about Polish consumers, in your opinion do they prefer purchasing premium sparkling wines.
30. In your opinion, Polish consumers prefer to buy premium sparkling wine for.
31. Do you think that there exists an interest in rosé sparkling wine among Polish consumers?
32. If YES, for which occasion?
33. In your opinion, which market opportunities exist for premium sparkling wines in Poland?
34. In your opinion, which market barriers exist for premium sparkling wines in Poland?
35. In your opinion, which style of Franciacorta DOCG do Polish consumers mostly prefer?
36. Why?
37. In your opinion, Polish consumers prefer to buy Franciacorta DOCG for.
38. Which of the following statements do you apply to Franciacorta DOCG?
39. In your opinion, the price 40€ of a 0,75l bottle of Franciacorta DOCG in Poland is.
40. Why?
41. In your opinion, is it easy for consumers to find/buy Franciacorta DOCG in Poland?
42. If NO, where should they find/buy Franciacorta DOCG more easily?
43. In your opinion, should Polish consumers have more information on Franciacorta DOCG to increase the market of these wines?
44. If YES, which strategy could be more effective for this?
45. In your opinion, by knowing Polish wine consumers' preferences and due to the current global scenario (e.g., rising price inflation, war in Ukraine, etc.), the consumption of Franciacorta DOCG in Poland in the next 3 years will.
46. What specific activities or promotional elements of Franciacorta DOCG (including advertising, trade or consumer events, promotions, and communications) have you seen in the Polish market?
47. What is your perception of how, on average, the suppliers of Franciacorta DOCG perform in terms of their relationships with their Polish business partners (their reliability, flexibility, timely actions, performance, etc.)?
48. What do you think are the single most important things that Franciacorta DOCG producers or trade associations should do to support the growth of this wine in Poland? Please offer a comment on initiatives you would recommend for consumers.
49. What do you think are the single most important things that Franciacorta DOCG producers or trade associations should do **to** support the growth of this wine in Poland? Please offer a comment on initiatives you would recommend for the trade.
50. In your opinion, which market opportunities exist for Franciacorta DOCG in Poland?
51. In your opinion, which market barriers exist for Franciacorta DOCG in Poland?
52. In your opinion, which are the weaknesses of the current supply of Franciacorta DOCG in Poland?