Consumer behaviour towards spirits products: Analysis of the French consumer's choice of Polish vodka

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Abstract

The aim of the study was to investigate French consumers' perceptions of their vodka preferences, with particular reference to Polish vodka brands and their recognition by the French population. Chapter I of the paper presents the theoretical background including the definition of consumer behaviour, the role of the country of origin and brand recognition together with the legal framework defining vodka in the European Union and selected countries of the world. In the chapter II, the general trends of the global and European spirits market with a focus on the vodka segment, as well as market potentials and barriers are presented. Finally, consumer trends in the market and their development directions are described in detail and classified thematically. Chapter III details the methodology of the research approach including the research questions and their objectives. Chapter IV is a comprehensive presentation of the survey results and outlines the trends evident from the survey data. Chapter V summarises the research findings and market trends in the context of consumer choice. It also treats the practical dimension of research in the form of the main conclusions with managerial implications implemented. The chapter also indicates areas for future research are described to make the research dimension broader and deeper and more effective.

Keywords: consumer behaviour, Polish vodka, spirits market, France

"Erasmus for all" subject area code: 04000

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Título da dissertação: Comportamento do consumidor em relação aos produtos espirituosos: Análise da escolha da vodka polaca pelo consumidor francês

Abstrato

O objetivo do estudo era investigar as percepções dos consumidores franceses sobre as suas preferências de vodka, com especial referência às marcas de vodka polacas e ao seu reconhecimento pela população francesa. O capítulo I do documento apresenta os antecedentes teóricos, incluindo a definição de comportamento do consumidor, o papel do país de origem e o reconhecimento da marca, juntamente com o quadro jurídico que define a vodka na União Europeia e em países seleccionados do mundo. No capítulo II, são apresentadas as tendências gerais do mercado mundial e europeu das bebidas espirituosas, com destaque para o segmento do vodka, bem como as potencialidades e os obstáculos do mercado. Por último, as tendências de consumo no mercado e as suas direcções de desenvolvimento são descritas em pormenor e classificadas tematicamente. O capítulo III descreve a metodologia da abordagem de investigação, incluindo as questões de investigação e os seus objectivos. O capítulo IV faz uma apresentação exaustiva dos resultados do inquérito e descreve as tendências evidentes a partir dos dados do inquérito. O capítulo V resume os resultados da investigação e as tendências do mercado no contexto da escolha do consumidor. Trata igualmente a dimensão prática da investigação sob a forma de conclusões principais com implicações de gestão implementadas. O capítulo indica ainda as áreas de investigação futura, a fim de tornar a dimensão da investigação mais ampla, mais profunda e mais eficaz.

Palavras-chave: comportamento do consumidor, vodka polaca, mercado das bebidas espirituosas, França

“Erasmus for all” subject area code: 04000

Table of Contents

Introduction

Polish vodka production is highly developed and drives Poland's Gross Domestic Product (GDP). Only between January and July 2022, more than 514.000 hectolitres of pure vodka have been produced in Poland, over 99% of which has been sold on both the domestic and export markets.[1] As the largest vodka producer among European Union (EU) countries and the fourth largest in the world, Poland exports 20% of its products.[2] However, the Polish spirits industry is currently experiencing a difficult period. Inflation, a galloping increase in the price of cereals and energy for the production of vodka, is causing its price to rise. In response to these problems on the domestic market, industry representatives are increasingly talking about the need to focus on export.[3] The value of Polish agri-food exported products, which includes vodka, is increasing year on year. In 2021, it amounted to € 37.393m, an increase of around 9% compared to the same period in 2020. In fourth place among the largest recipients of Polish agri-food goods was France, to which last year goods worth € 2.149m were sold, representing an increase of 16.1% (in 2020 - € 1.851m) and a share in exports of 5.7%.[4] In the choice of Polish vodkas as export goods, it is French consumers who seem to lead the way. Indeed, most Polish spirits are exported to France. In 2019, it was 62% of all Polish vodka exports.[5]

This research will primarily focus on a comprehensive analysis of French consumer behaviour in the spirits industry. Taking into account the excellent reputation of Polish vodka on Western European markets, the study will explore the choices of French consumers on alcoholic beverages and their approach to vodkas imported from Poland. An analysis of consumer behaviour based on market research will be presented against the background of marketing scientific theories.

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[1] Statistics Poland (GUS). *Production of major industrial products in July 2022* from: https://stat.gov.pl/en/topics/industry-construction-fixed-assets/industry/production-of-major-industrial-products-in-july-2022,2,117.html [Accessed: 9.09.2022].

[2] Spirits EUROPE. *Spirits of Europe Faces and places of a sector* from: https://spirits.eu/v1/files/24/spirits-europe-7-low-resolution.pdf [Accessed: 9.09.2022].

[3] In an interview with *Rzeczpospolita* daily newspaper during the XXXI Economic Forum in Karpacz, Witold Włodarczyk, president of the Association of Employers Polish Spirits Industry, emphasised the need to focus on exports. Source: https://www.rp.pl/gospodarka/art36999181-witold-wlodarczyk-vodka-could-be-our-export-hit

[4] Ministry of Agricultural and Rural Development. *Polish foreign trade of agri-food products in 2021* from: https://www.gov.pl/web/rolnictwo/handel-zagraniczny-artykulami-rolno-spozywczymi

[5] Global Trade Daily (2020). France is the Major Market for Premium Vodka from Poland, Purchasing $99M or 62% of Its Total Exports from: https://www.globaltrademag.com/france-is-the-major-market-for-premium-vodka-from-poland-purchasing-99m-or-62-of-its-total-exports/ [Accessed 6.09.2022].

Chapter 1. Literature Review

This chapter will provide the theoretical background to the subject of analysis. From outlining the different perspectives on consumer behaviour, through drawing a framework for the definition of pure vodka in the European Union legislation, to the role of brand recognition and the theory of the influence of the country of origin of the product on shaping consumer choices. Featuring the current state of scientific research in the field, the chapter content will provide an in-depth understanding of the researchers' output and present theory, which will be cross-referenced with quantitative research in later sections.

1.1. Definition of consumer behaviour

Many scientists over the years have attempted to frame a definition of consumer behaviour. At least a number of definitions exist, and many authors view consumer behaviour through the prism of their experience, scientific domain or scientific research conducted. A few of consumer behaviour definitions are summarised in the table below.

Table 1. Consumer behaviour definitions outline

(Kotler, 1994)	"the study of how people buy, what they buy, when they buy and why they buy"
(Bennett, 1995)	"the dynamic interaction of affect and cognition, behaviour, and the environment by which human beings conduct the exchange aspects of their lives"
(Khan, 2007)	"[…] the decision-making process and physical activity involved in acquiring, evaluating, using and disposing of goods and services. […] the process starts much more before the goods have been acquired or bought"
(Schiffman, Hansen & Kanuk, 2007)	"the behaviour that consumers display in searching for, purchasing, using, evaluating, and disposing of products and services that they expect will satisfy their needs"

Source: Own research

Research studies also highlight the multifaceted nature of behaviour and the variety of approaches to analysing it. Researchers highlight behavioural issues from the borderline between sociology and cognitive psychology to explain decision-making, as well as marketing science approaches to predict consumer choice (Olson & Peter, 2010). Many researchers narrow their research search and focus on trying to characterise "consumer buyer behaviour". Thus, they are defined as activities involving the purchase and use of goods and services, resulting from both the emotional and psychological needs of customers, as well as behavioural responses (Stallworth, 2008).

This type of consumer behaviour is also defined by as the set of behaviours expressed by consumers when selecting and purchasing products or services while using the resources available to them to satisfy their needs (Schiffman, Hansen & Kanuk, 2007).

1.2. Definition of vodka and EU legal framework

Under European Union law[6], vodka is defined as a spirit drink which is produced from ethyl alcohol of agricultural origin by fermentation using yeast from potatoes, cereals, both or other agricultural raw materials. Vodka must be obtained by distillation in such a way that the organoleptic characteristics are preserved and – in order to be released for consumption in the European Union – it must also contain min. 37.5% pure alcohol by volume (ABV).

A spirit drink that can legally be called vodka under EU regulations by meeting the conditions described above may also be accompanied by other terms such as: "traditional", "made from grain", etc. provided that the specified are met and the label accurately reflects the production method and raw materials used. The term "Polish vodka" also fits within this framework. In order to legally use it, the producer should carry out at least one of the distillation or preparation stages in Poland. In this case, the manufacturer may optionally include the EU Protected Geographical Indication (GI) logo for spirit drinks on the label (see Figure 1). This indication protects the name of a spirit drink originating in a country, region or locality where a particular quality, reputation or other characteristic of the product is essentially attributable to its geographical origin[7].

[6] European Parliament (EP), *Regulation (EU) 2019/787 of the European Parliament and of the Council of 17 April 2019* from: https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32019R0787

[7] European Commission (EC), *Commission Delegated Regulation (EU) 2021/1235* from: https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32021R1235
European Commission (EC), *Commission Delegated Regulation (EU) 2021/1236* from: https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32021R1236

Figure 1. Geographical Indication of spirit drinks (GI) EU logotypes

Source: European Commission Delegated Regulation (EU) 664/2014

It should be noted that the above characteristics apply to the countries of the European Union. In the case of all quality schemes, the relevant national authorities in individual EU countries take necessary actions to safeguard registered names within their territories. They are also required to counteract and prevent the unlawful manufacturing or sale of products carrying such names.

Furthermore, names of products originating from outside the EU can be registered as Geographical Indications (GIs) if their country of origin has entered into a bilateral or regional agreement with the EU, which includes mutual protection of these names.

Globally, definitions of vodka vary. There are also slight differences in nomenclature and characteristics outside the single European market. The table below gives an insight into the diversity of definitions of vodka in different parts of the world. However, for the purposes of this study and the analysis focused within the boundaries of the European spirits market, the specific regulations in non-European countries regarding vodka as a spirit drink have been omitted.

Table 2. Definitions of vodka in selected countries outside the EU

Country	Regulation law	Regulator institution	Definition
United States	Chapter I, of Title 27, Code of Federal Regulations[8]	Alcohol and Tobacco Tax and Trade Bureau (TTB)	Vodka is a neutral spirit distilled or treated after distillation with charcoal or other materials so as to be without distinctive character, aroma, taste, or colour. The minimum alcoholic strength in the U.S. is 40% ABV[9].
India	Food Safety and Standards (Alcoholic Beverages) Regulations	Food Safety and Standards Authority of India (FSSAI)	"Vodka is a distilled alcoholic beverage made from the neutral spirit obtained from fermented mash of rye, potato, cassava, grains or any other carbohydrates of agricultural origin. Ethyl alcohol content at 20°C must be within a range of 36 to 50 per cent by volume." [10]
Australia	Australia New Zealand Food Standards Code – Standard 2.7.5 – Spirits	Food Standards Australia New Zealand (FSANZ)	Vodka is a part of spirits and is defined as a neutral spirit that is potable, colourless, and without distinctive characteristics of odour, taste, or flavour. The standard specifies that vodka should have an alcoholic strength of at least 37% ABV at the time of manufacture.[11]

Source: Own research

[8] *Chapter I, of Title 27, Code of Federal Regulations* from: https://www.ecfr.gov/current/title-27/chapter-I

[9] https://www.ecfr.gov/current/title-27/chapter-I/subchapter-A/part-5

[10] Food Safety and Standards Authority of India (2018), *Food Safety and Standards (Alcoholic Beverages) Regulations* p. 4 from: https://www.fssai.gov.in/upload/uploadfiles/files/Compendium_Alcoholic_Beverages_Regulations_04_03_2021.pdf

[11] Australia New Zealand Food Standards Code – Standard 2.7.5 – Spirits (2020) from: https://www.legislation.gov.au/Details/F2020C00028

1.3. Brand recognition

Brand recognition by the consumer has a key influence on the perception of a product and significantly helps to influence the choice of a product against one that the customer has not heard of before (Court, Freeling, Leiter & Person, 1997). A low level of brand recognition determines the classification in the minds of consumers of a product as irrelevant in the selection process. In contrast, a high level of brand recognition indicates the importance of the brand's origin (Samiee, Shimp & Sharma, 2005). In export markets, the situation looks a little more difficult, as brand awareness has to be built up from the beginning - irrespective of the position on the home market - also taking into account the country-of-origin factor.

1.4. Role of the country-of-origin effect

The impact of country of origin on consumer perceptions and consumer habits is a topic of strong interest to researchers, and analyses of brand country of origin as an important vector of consumer choice are at the forefront of the most popular research areas in marketing (Papadopoulos, 2002).

It has been proven that consumers, having a perception of a country in mind, use this knowledge in the process of associating a product with its quality level. Country of origin is an important factor in the consumer's pre-purchase evaluation of a product (Schooler, 1965) and also influences the final purchase decision (Beverland i Lindgreen, 2002). In this way, the country of origin of a product significantly influences the formation of consumer habits and the formation of preferences of both individual and collective nature (Panda, 2014).

Country-of-origin is defined as an "information pertaining to where a product is made" (Zhang, 1996), and customers can make country-of-origin positioning based on country-related aspects such as i.a.: political climate, cultural identity, history or economic and technological development (Kaynak, Kucukemiroglu i Hyder, 2000). Thus, they are able to position products based on their country of origin. It is no secret that consumers generalise their preference for products from one country over others. Moreover, researchers indicate that country of origin is one of the most essential factors influencing evaluations of foreign products (Kumura & Canhua, 2010). Interestingly, research shows that products from one's own country or a more developed country are perceived better by consumers than those from developing countries (Bilkey, 1982). This is influenced by many aspects already mentioned before.

On the basis of preferences, which are based on origin, consumers rank a country's products in terms of: price, quality or availability. Consumers' educational level and age also determine whether they judge a product based on its country of origin. The country-of-origin effect can also be counteracted by marketing activities and various retailing tricks (Crodell, 1992).

To sum up, the country of origin is thus a starting point in creating a brand or product image in the minds of consumers in a given market. It is a positive or negative cliché that can be modelled by the company's actions at the time of its launch. However, the impact of the country of origin effect varies depending on the education or age of consumers.

1.5. Research gap

The factors influencing consumers' choice of vodka is a deeply analysed topic in quantitative terms. There are a considerable number of studies looking at specific European markets and analysing a narrow research group (Drossos & Skordoulis, 2016) and (Stavkova & Sugrova, 2018). The researchers tried a whole variety of different hypotheses to better understand the factors influencing the choice of a particular brand of vodka by different types of customers. Some of the factors were based on the country of origin of the product or the recognition and reputation of the brand in a particular market. The area of Polish products and their choice by French consumers can be classified against this background as an area for which missing information limits the ability to draw relevant conclusions.

Chapter 2. Spirits Market

This chapter is dedicated to presenting the spirits market. Potentials and barriers, consumer trends and future projections for the market are described. After outlining the bigger picture in terms of new trends and consumer insights, the following sections will maintain a focus on the French market and the positioning of Polish vodka, whose cultural dimensions are bound up with the centuries-old tradition of production.

2.1. Market Outlook

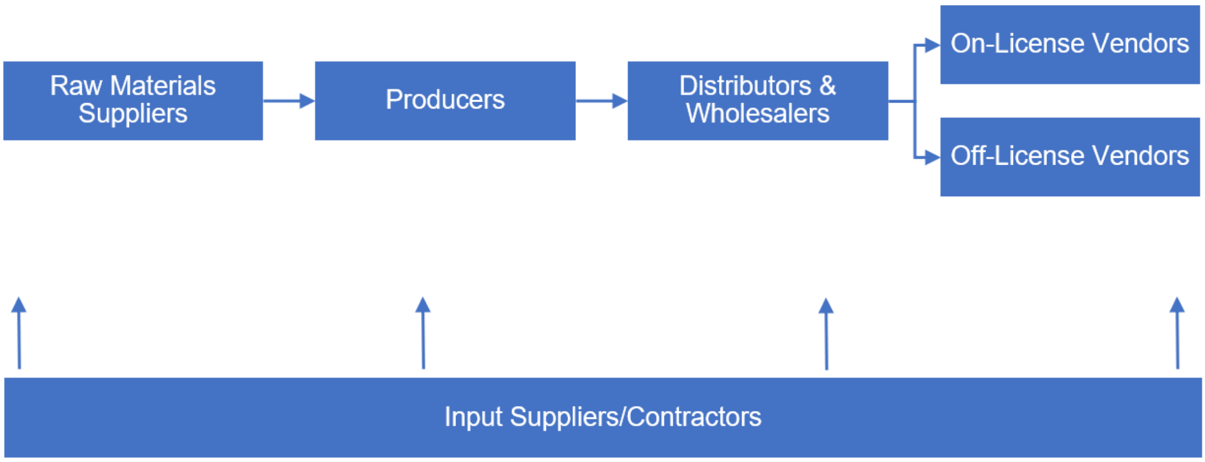
The alcohol industry – comprising the production, distribution and sale of alcoholic beverages with a significant alcohol content such as vodka, whisky, rum, tequila, gin, brandy, liqueurs etc. – is such a receptive concept that no single universally applicable definition stands out. In their attempts to define the framework of the market, researchers take into account almost all value chain actors and pay attention to geographical variation in terms of production methods. Jernigan highlights that "the alcoholic beverage industry includes producers, wholesalers and distributors, point-of-sale operators (whether licensed or not) and hospitality providers such as hotels or cafés that serve alcohol. Its production and distribution arms are allied closely with agriculture, trucking, capital goods manufacturing and packaging industries. […] Within countries there are varying degrees of vertical integration of alcohol production, distribution and sales, with a general trend towards this fuelled by economic liberalization and accompanying regional and global trade agreements" (Jernigan, 2009). Other researchers take the industry definition equally widely and argue that the alcohol industry refers to the "[…] producers of beer, wine, and distilled spirits and their networks of distributors and retailers. Trade associations and social aspects/public relations organizations, which are funded to promote industry interests, are also included in this definition" (Babor et al., 2018).

Thus, aspects of the production and distribution of the alcohol industry at various levels are inherent in agriculture, logistics, capital goods production or the packaging industry, and attempts to define the industry are based on accurately describing the entire alcohol value chain from the sourcing of raw material to the delivery of alcohol to consumers (see Figure 2).

According to Institute of Alcohol Studies data, the actors that are part of the value chain can be divided into:

- Raw Materials Suppliers (Farmers)
- Producers (Distilleries)
- Distributors & Wholesalers
- On-License Vendors (Pubs, Clubs, Restaurants, Hotels)
- Off-License Vendors (Corner shops, Supermarkets)
- Input Suppliers/Contractors (Equipment/Freight providers, Marketing teams).

Figure 2. Alcohol Industry Value Chain



Source: Institute of Alcohol Studies (2018)

Due to the nature of the value chain, which is not very flexible the market landscape worldwide is characterised by extremely high dynamism and the strong influence of macro- and micro-economic trends. Constantly evolving, it generates a highly competitive environment (also due to competition from other alcoholic beverage segments such as wine and beer) with many global and regional players competing to gain market share. Competitors have strong brand portfolios, extensive distribution networks and deep industry knowledge to analyse current trends and create competitive advantage in a very crowded marketplace.

According to available data (see Table 3), the market is half dominated by major global players in the spirits market, who compete with each other through market operations and the pursuit of business objectives adapted to specific global markets. In 2016, these included geographically diverse companies from almost all continents, although there are noticeable differences in market share distribution with one dominant global market leader: Diageo.

Table 3. Share of global market volume of the 10 leading multinational producers of alcoholic beverages by distilled spirits category

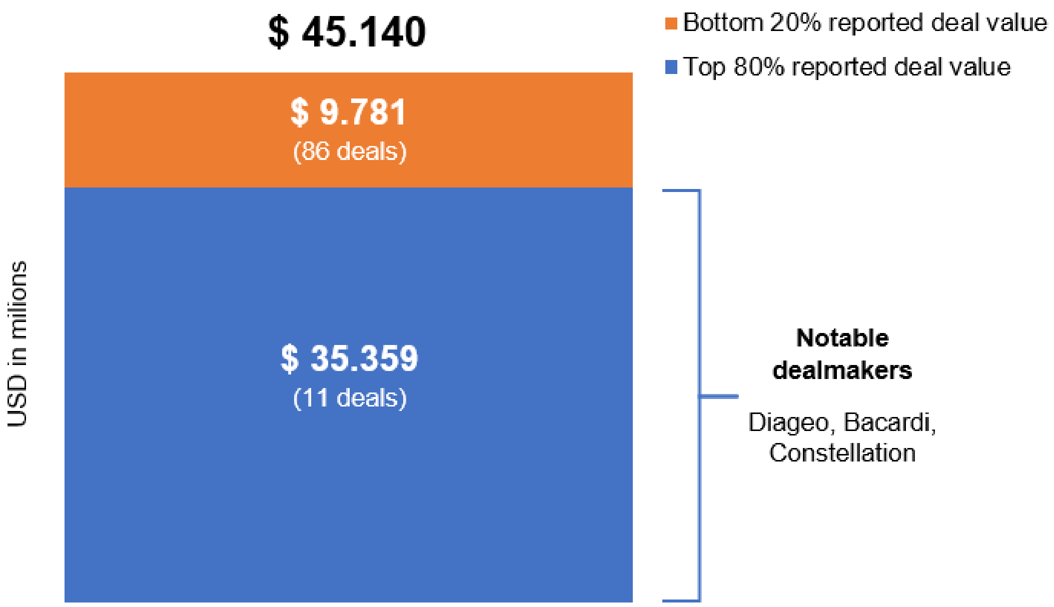
	Headquarters	**2016**
Diageo	United Kingdom	20.0%
Pernod Ricard	France	9.7%
Beam Suntory	Japan	4.9%
Bacardi Ltd.	Bermuda	2.9%
Allied Blenders and Distillers	India	2.8%
Gruppo Campari	Italy	2.2%
Sazerac Co. Inc.	United States	2.2%
Brown-Forman Beverages Worldwide	United States	2.0%
Roust	Russia	2.0%
Group La Martiniquaise	France	1.9%
Total market share of Top 10	**50.6%**	

Source: Jernigan & Ross, 2020

Multinational spirits leaders also gain market share through Mergers and Acquisitions (M&A), which "breathes new life into brand portfolios for spirits companies"[12]. Between 2016 and 2020, 97 significant global transactions with a total value of $ 45.14bn were completed.

[12] PwC (2021). *M&A breathes new life into brand portfolios for spirits companies* from: https://www.pwc.com/us/en/industries/consumer-markets/library/m-and-a-deals-for-spririts.html [Accessed 5.07.2023]

Figure 3. Total Reported Deal Value in Spirits (2016-2020)



Source: PwC, 2021

The M&A data from the above-mentioned four-year period clearly shows the direction of market concentration, with several major players gaining ground through various horizontal and vertical acquisitions. According to market researchers from Mordor Intelligence, companies such as Brown Forman, Pernod Ricard, Diageo, William Grant & Sons and Beam Suntory are gaining in importance (see Figure 4).

Figure 4. Spirits Market Leaders

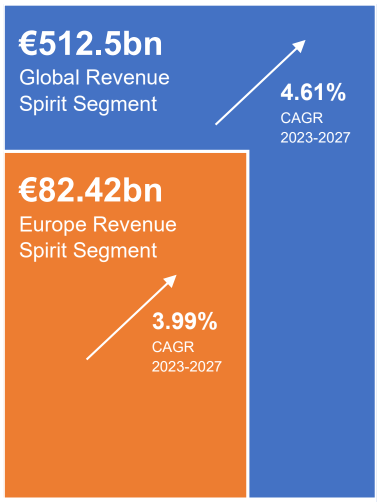
Source: Mordor Intelligence, 2022

Figure 5. Spirits Market Concentration

Source: Mordor Intelligence, 2022

Given the above figure, the spirits market offers an extremely wide and highly differentiated product range by taste, style, region of origin, production or distillation method. Each type of spirit has its own characteristics, which allows for accurate market segmentation and the meeting of differentiated consumer preferences.

Figure 6. Global & Europe Revenue in Spirits Segment Forecast



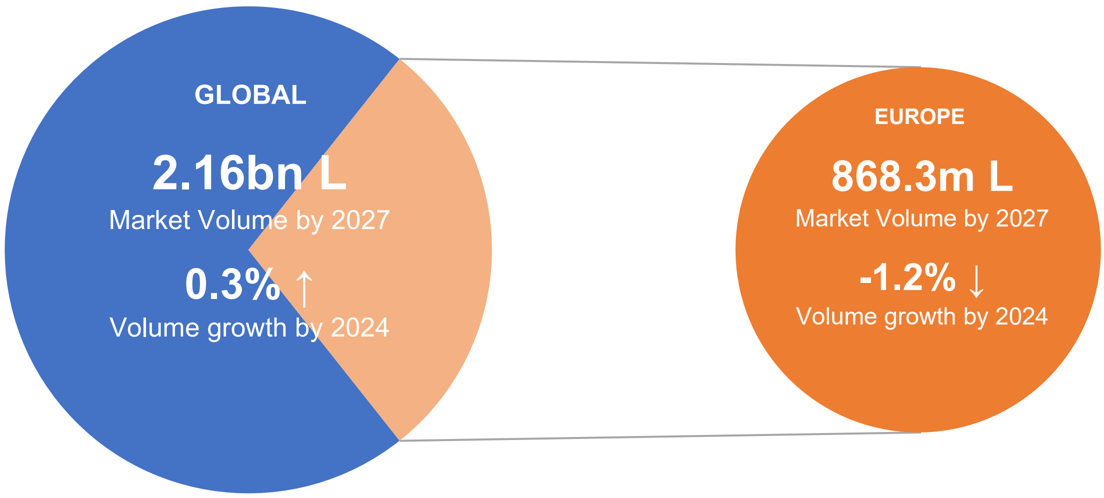
Source: Statista, 2023

This is reflected in the high value of the market and steadily growing revenues. The global revenue of spirit segment is estimated to reach € 512.5bn in 2023, with an estimated CAGR of 3.99% per year over four consecutive years. Only in Europe, this figure is expected to be higher and is projected to grow annually by 4.61% (CAGR 2023-2027) (Statista, 2023).

Stable annual growth rate suggests a steady expansion of the global spirit market with a healthy demand for spirits and higher growth potential in Europe compared to the global average. With a projected € 82.42bn revenue, Europe is likely to play a significant role contributing to the overall revenue and market expansion. It shows a certain path for companies who can make informed decisions about expansion, investment and product development strategies.

On the other hand, changes in the global economy play a large role, undermining performance through trade disruptions and elevating energy prices, causing high inflation and increases in the cost of living. The Russian invasion of Ukraine in February 2022 was the catalyst for these negative trends. Distilleries began to see triple-digit increases in energy, transport, glass and raw material prices, bringing the recession closer in important spirits markets such as Europe or the UK[13]. Looking more deeply at global data forecasts for vodka market volume, it is projected at the level of 2.16bn liters (L) by 2027, with estimated global volume growth of 0.3% by 2024. In Europe volume growth can be seen -1.2% by 2024 and projected market volume is 868.3m L by 2027.

Figure 7. Global & Europe Vodka Market Volume Forecast with Volume growth rate



Source: Statista, 2023

Despite a projected decline in volume growth in the short term in Europe and slightly moderate volume growth over the forecast period worldwide, these figures confirm a relatively stable market with steady demand for vodka worldwide.

As the data show, the vodka market in Europe is anticipating difficulties as volume growth is estimated to be below 0. This negative growth suggests a decline in demand or market saturation in some European countries. Distilleries and distributors operating in Europe may have to adjust their strategies to cope with this downward trend.

[13] The Spirits Business (2022). *World Spirits Report 2022: Vodka* from: https://www.thespiritsbusiness.com/2022/12/world-spirits-report-2022-vodka/ [Accessed 6.07.2023]

At the same time – as the global vodka market shows positive growth – companies in the industry may consider expanding their operations outside of Europe to take advantage of projected global volume growth. Regions such as North America, Asia Pacific and emerging markets may present opportunities for market expansion and increased sales.

2.2. Market Features

It is well known that spirits market features with a focus on vodka vary from one world region to another. However, it is possible to distinguish several emerging characteristics, which are classified thematically below.

Evolving drinking habits

Despite differences in consumption within the EU, Europe has the highest drinking volume in the world[14]. It is therefore no surprise that Europe is of great interest to spirits producers, providing fertile ground for testing product innovations and expanding portfolios. Consumption patterns in Europe leave a lot of space for vodka, which is a multipurpose spirit that allows both direct consumption and mixing as an ingredient in drinks and cocktails. Combined with a developed European nightlife and an extensive network of vodka-serving establishments, this drives the demand for quality vodka as a base spirit.

The changing preferences of more conscious consumers place great importance on the uniqueness of taste, the production process and the origin of ingredients, giving the field to craft spirits. Consumers are also increasingly seeking authenticity and celebrating the experience of drinking high-quality products leading to the development of brands premiumization.

Increased flavour diversity

In addition to pure vodka, spirits companies also innovate in terms of flavour variety to meet the expectations of different consumer personas. They seek a variety of taste sensations, and race to catch and fulfil them as much as possible. Hence the expansion of the product range to include flavoured vodkas: fruit and botanicals, as well as the development of other market segments such as vodka-based ready-to-drink (RTD) beverages, mainly sold as ready-made canned cocktails. In the US only, 70% of adult consumers are more likely to choose a vodka-

[14] Euronews (2023). Europe is home to the world's heaviest drinkers. Which country drinks the most alcohol? from: https://www.euronews.com/next/2023/06/30/so-long-dry-january-which-country-drinks-the-most-alcohol-in-europe [Accessed 9.07.2023]

based RTD than any other spirit[15]. With the popularisation of RTDs expected to take a greater market share, brand owners companies are increasingly developing the category in a number of important global markets such as the UK, US, Mexico and Australia. At the same time, this drives the premiumization of such beverages. According to the IWSR Drink Market Analysis, the factors that favour the popularisation of premium RTDs are primarily the search for new flavours (55%) and a well-known brand (46%)[16].

Shift towards sustainability

The growing awareness of sustainability and concern for the environment reflects a change in the minds of consumers who, in their search for new flavours, are paying increasing attention to organic or bio vodkas produced using environmentally friendly methods. This segment development driven by consumers concerned about responsible sourcing, and ethical production practices, is also forcing a greater emphasis on social responsibility by producers, who are gaining market share by following sustainable values. It also allows the innovation to be implemented. One of these – proposed by The Air Company – is vodka, which uses CO^2 drawn directly from the air or captured at source in industrial plants, and combines it with hydrogen created by electrolysis. The technology used to combine these elements creates ethanol, which, when combined with water, becomes vodka[17].

Sustainability is also being put to the test by investing in free-carbon print production infrastructure. In recent years, this has been done by Pernod Ricard by powering its distillery with renewable energy and beginning the process of moving away from fossil fuels[18].

Taking into account the above features that shape the customers of the constantly expanding product range, it is possible to distinguish the potentials and barriers associated with operating in the spirits market.

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[15] CGA by NIQ (2023). *Who is the American RTD drinker?* from: https://cgastrategy.com/report-who-is-the-american-rtd-drinker/ [Accessed 9.07.2023]
[16] IWSR Drinks Market Analysis (2022). *Tequila and vodka are the most popular bases for spirit-based RTDs in the US* from: https://www.theiwsr.com/tequila-and-vodka-are-the-most-popular-bases-for-spirit-based-rtds-in-the-us/ [Accessed 9.07.2023]
[17] The Guardian (2021). *World's most sustainable spirit': the vodka made with CO2 captured from air* from: https://www.theguardian.com/food/2021/oct/20/vodka-made-with-co2-captured-from-air-sustainable-spirit [Accessed 9.07.2023]
[18] Pernod Ricard (2021). *Absolut Vodka: a carbon neutral distillery* from: https://www.pernod-ricard.com/en/media/absolut-vodka-carbon-neutral-distillery [Accessed 10.07.2023]

2.2.1. Opportunities

- **Resilient market**

The spirits market is relatively resilient to non-cyclical consumer demand. Regardless of economic conditions, vodka remains a popular and widely consumed alcoholic beverage. This stability in demand allows for relatively secure investment and a good opportunity for vodka producers to benefit from a stable customer and supplier base and generate recurring revenues.

- **E-commerce development**

According to analysts from IWSR Drink Market Analysis, it is convenience that will drive e-commerce sales growth no matter the purpose behind it. It could be to replenish stock as was the case in the pandemic, during which the e-commerce market grew by a record 43% in 2020, or it could simply be to treating oneself.[19] The purchasing habits of ordering online developed during the pandemic period have been made permanent. Although the weaker economic outlook has slowed growth, e-commerce in the spirits market is still an interesting route to expand consumer groups. The segment is forecast to grow by 34% between 2021 and 2026[20]. The reasons why consumers choose to buy alcohol online are driven by the cost of living. Achieving the result of pandemic e-commerce growth seems unrealistic, but by flexibly adapting to the current economic situation, opportunities still arise for spirits brands to secure continued growth in this segment.

By skipping traditional distribution channels and creating another opportunity to reach consumers using e-commerce channels, new customer contacts can be established and margins can be increased by shortening the value chain and omitting intermediaries.

- **Product innovation implementation**

Leveraging vodka to broaden the regular customer base and generate recurring distributed revenue can also be done by following consumer tastes and offering new products under brands with high brand awareness among the target group. Trying to continuously meet customer expectations can be challenging. On the other hand, it allows the testing and implementation

[19] IWSR Drink Market (2022). *Beverage alcohol ecommerce value to grow by a third over the next five years, despite weaker macroeconomic outlook* from: https://www.theiwsr.com/beverage-alcohol-ecommerce-value-to-grow-by-a-third-over-the-next-five-years-despite-weaker-macroeconomic-outlook/ [Accessed 10.07.2023]

[20] The Spirits Business (2022). *Alcohol e-commerce sales to rise by 34%* https://www.thespiritsbusiness.com/2022/11/alcohol-e-commerce-sales-to-rise-by-34/ [Accessed 10.07.2023]

of many different product innovations in terms of unique flavour combinations or original production methods, but also the development of a product portfolio with new vodka-based or non-alcoholic alcoholic beverages but under a well-known spirit brand name. With the latter, companies can expand outreach to particular consumer segments that are looking for slightly different experiences e.g. low-alcohol options.

Product innovation also involves expanding flavour profiles and diversifying production methods with a focus on local and artisanal production. Given evolving drinking habits and the constant consumer search for new sensations when choosing vodka, companies – by emphasising the high quality behind local production and personalising the taste experience – can differentiate themselves and attract discerning consumers who value trust, authenticity and premium exclusivity. In addition, by positioning their spirits products as artisanal and made in small batches, companies can gain recognition from customers who value character, exclusivity and supporting independent local distilleries by including them in the production process as a key player of the value chain.

2.2.2. Barriers

- **Fragile supply chain**

Due to the total dependence of vodka production on agricultural commodities, the supply chain in the vodka market is extremely susceptible to various influences such as: weather conditions, shifts in tax and regulatory frameworks and policies attitude towards agriculture, or geopolitical conflicts that affect the economic environment.

Weather-related risks can also affect the availability and quality of these agricultural commodities. Droughts, floods or unforeseen natural disasters intensify the risk to crop failure, reducing the supply of raw materials for vodka production. As a result, a gradual increase in prices or a deficit of vodka on the market might be performed.

Fluctuations in the prices of grain, potatoes or sugar cane on global markets, caused mainly by geopolitical tensions and their economic effects: rising inflation in Europe or the creeping energy crisis, make vodka production costs borne by producers higher and it is difficult to estimate their dynamics even in the short term. Therefore, the vodka market, in the face of constant change, faces the challenge of redefining its value chains to become more flexible and able to adapt better to external conditions. This becomes particularly important because of possible internal disruptions in the chains. Transport delays or trade restrictions in different parts of the world can negatively affect the flow of raw materials, production processes and can undermine the robustness of distribution networks. As a consequence of this driving snowball, it is not only companies that lose out on production delays and cost increases. Above all, it is consumers whose demand may not be fully met.

- **Standardisation difficulties in distribution network**

Due to the specific structure of supply chains, the spirits industry and vodka producers also face the challenge of creating efficient distribution channels. However, standardisation of distribution is not a simple task due to the considerable differences in the structures of the markets themselves, the laws enacted by regulators in specific countries or regions and the relationships with distributors.

The fragmented or consolidated presence of distributors in the market and their number affects the reach and efficiency of vodka distribution channels and the ability to easily penetrate neighbouring markets. Regulations governing the sale and distribution of vodka also have an impact. The need to adapt to licensing requirements or to fit into the advertising and taxes legal framework, requires additional financial resources to ensure compliance with the requirements set by the market regulators. On a global scale, when a company operates in many different markets, this significantly impedes the standardisation process of distribution and thus hinders the efficiency of the value chain.

It is also important to maintain partnerships between producers and distributors. For global producers, good cooperation with experienced local distributors, familiar with the specifics of local markets, is essential to ensure the effective promotion of spirits products.

- **Large initial investments requirement**

Running a business in the spirits industry within the vodka segment is highly capital-intensive. Getting through the legal procedures, setting up and running a distillery means significant financial investment in production and storage infrastructure. Therefore, the initial capital factor is a significant entry barrier for the increase of competitors and new players, making it difficult to gain market share in an established market. In addition, in order to later maintain its position, it is necessary to continuously invest in the existing infrastructure in order to modernise production processes, improve their efficiency and test production innovations.

Furthermore, when market concentration is fairly consolidated, with several Multinational Enterprises leading the way by expanding market share through M&A and buying individual brands with growth prospects, it is can be clearly seen that extensive investment and large initial capital are also required to establish a global presence.

2.2.3. Summary

Steady demand for vodka, the e-commerce development, and the expansion of the product portfolio to follow consumer tastes seem to be among the greatest potentials of the spirits market including the vodka segment. On the other hand, the biggest barriers that impede growth dynamics seem to be the unstable supply chain, the challenging standardisation of distribution channels across different markets and the requirement for large investments. The ability to spot market opportunities quickly and maximise adaptability in the face of challenges and uncertainty is key to gaining a competitive advantage (see Table 4).

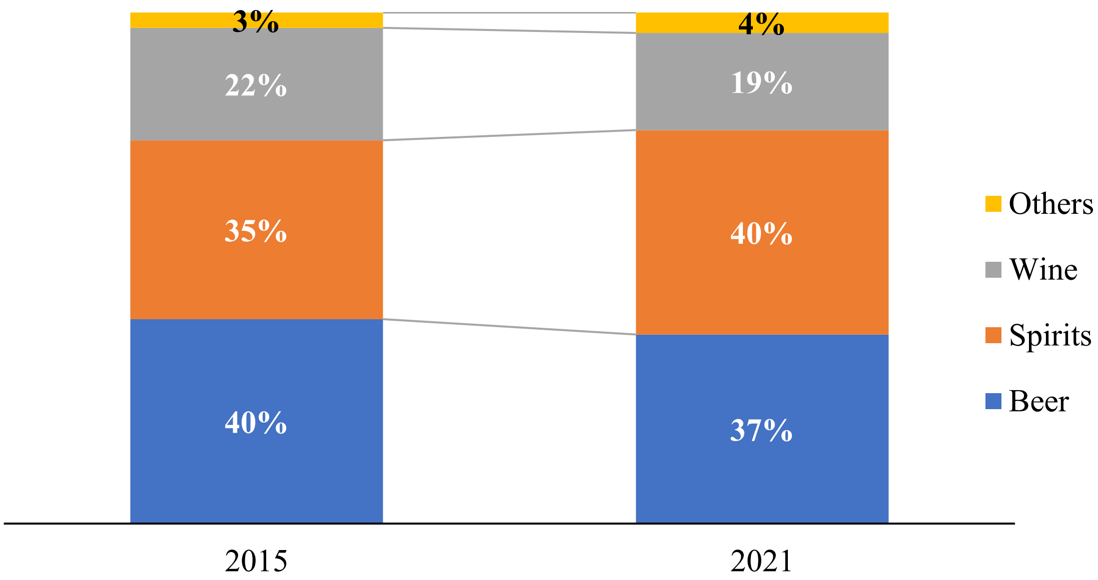
Table 4. Opportunities and barriers in global spirits market

Opportunities	**Barriers**
Resilient market with constant consumer demand in global markets, independent of economic cycles	Fragile supply chain: the vodka segment is dependent on agricultural production and the supply of raw materials such. Their availability depends on weather conditions, energy price changes, policies, which can cause significant disruptions
Betting on e-commerce development gives vodka brands the opportunity to shorten their reach to consumers by skipping traditional distribution channels	The difficulty in standardising distribution channels is conditioned by the operation in markets with diverse structures, legal frameworks and distributor networks
Product innovation development: customers still seek unique flavours and the experience exclusivity offered by artisanal production in small lots	Spirits industry is asset-heavy by nature and requires large investment capital resources

Source: Own research

Over the six-year period between 2015-2021, spirits became the first total beverage alcohol (TBA). Market share increase of about 5% makes spirits segment the best growing one among all categories. That is why “some of the leading manufacturers, like Pernod Richard, Thai Bev, Diageo, and Suntory, are focusing on leveraging opportunities posed by the rapidly growing market segments, in order to expand their revenue base. [...]” (Mordor Intelligence, 2022).

Figure 8. Spirits value TBA share 2015-2021



Source: Pernod Ricard, 2022

This shows a stable situation also for vodka, which continues to benefit from relatively stable demand on the European market and seems immune to the economic perturbations described in the next section. These economic benchmarks, however, have an impact on shaping consumer attitudes and choices.

2.3. Consumer Trends

According to the IWSR Drink Market Analysis consumer data for Q4 2022, the trends that have shaped the global alcoholic beverages market to date will change significantly in the short-term forecast (IWSR, 2022). Over the outlook of the next 5 years, as the world completes the recovery and economic mitigation phase of the Covid-19 pandemic, it is entering a period of increasing economic instability caused by geopolitical tensions, the energy crisis and rising inflation. Although the approach to these factors varies from one region of the world to another, consumers are nevertheless experiencing the effects of these changes in their pockets.

The IWSR identifies three main consumer strategies in the face of economic uncertainty and the spectre of impending crisis. These are:

- moderation,
- selective up-trading within certain beverage categories,
- value-seeking shopping strategies within preferred brands.

Market analysts from IWSR also highlight that customers are more cautious and reduce the number of occasions on which alcohol is consumed. They are also limiting the number of alcoholic drinks consumed on given occasions. These factors are driven by reducing household spending.

Despite the perturbations, spending cuts and trends driven by economics, other tendencies due to demographics and evolving consumer preferences are also noticeable. Premiumization, increased interest in craft spirits, and sustainability measures may have a significant impact on the spirits market performance as a general whole, as well as vodka sector particularly. Brands that adapt to the changing consumer trends by implementing organic ingredients, sustainable practices or highlighting their artisanal production methods can gain a competitive advantage. These trends are classified and described below based on relevant industry sources.

2.3.1. Demographic changes

Alcohol preferences depend on socio-demographic factors, which have a strong influence on shaping consumer trends in the spirits market, including the vodka segment. Demand and supply in the spirits market are also subject to changes that are inherently linked to demographics.

The world population reached 8bn people mid-November 2022 and is still growing (Roser et al. 2013). However, population dynamics also vary enormously by region and continent. In the EU, the population grew steadily between 1960 and 2022, reaching 446.8mn on 1 January 2022. Growth slowed over the past few decades and stopped during the Covid-19 pandemic, due to the fact that migration did not compensate for the population decline and the falling birth rate was lower than the dramatically rising death rate.

The EU population is now projected to continue to grow, but only for the next 6 years at a reduced rate, after 2029 it will begin a slow decline[21]. Furthermore, the share of EU Member States in the size of the world population will gradually decrease. It is estimated that between 2022 and 2100 the EU population will have decreased by 27.3mn people (a drop of 6%)[22].

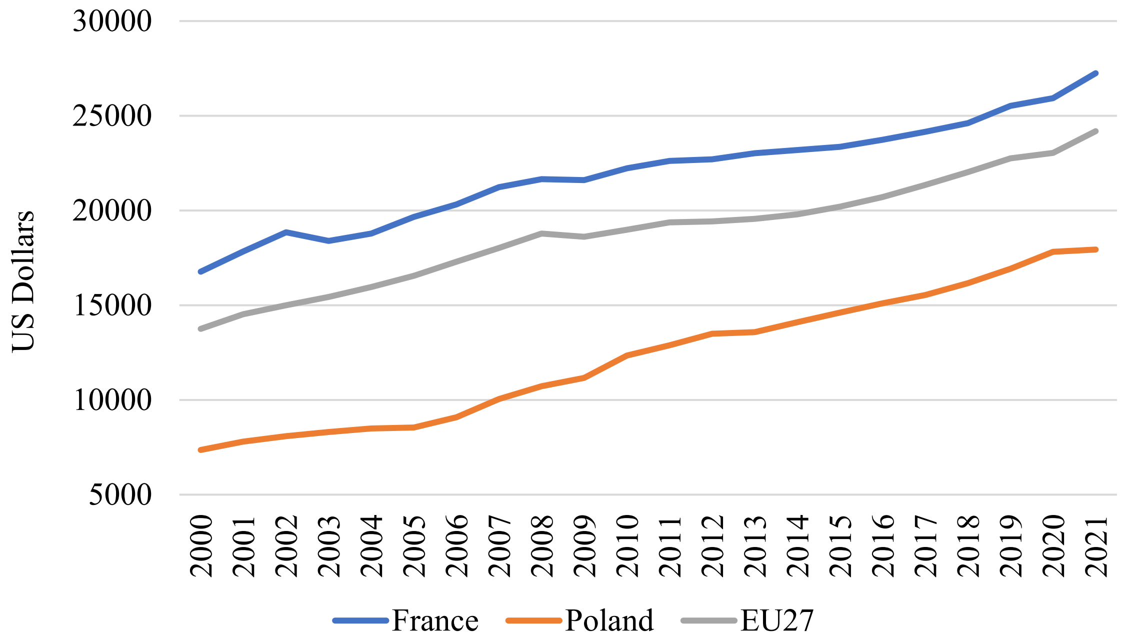
Europe is also getting older and there is an increase in the number of people over the age of 65, who have already accounted for more than 20% of the EU population for several years. In parallel, the share of young Europeans is decreasing. It can be seen in numbers: in 15-29 age range the share decreased from 18.1% in 2011 to 16.6% in 2019, and further declined to 16.3% in 2021[23]. Ageing European societies at varying paces and changes in the age structure are reflected in Legal Drinking Age (LDA) population capabilities and consumer preferences in the choice of spirits including vodka. In 2021, it is the millennials who have led the global rebound in alcohol consumption, being the generation relatively least affected by the pandemic restrictions and its consequences[24]. These consumers aged 25-40 are more adventurous than older generations and – thanks to their considerable purchasing power – adhere to the principle of "less but better": which translates into a greater propensity to buy premium products than their parents[25].

The selection of spirits and the decision to purchase them is also determined by the level of gross disposable income, which is subject to change in the face of economic perturbations. Changing family patterns, cultural conditions or the level of income in the population can affect the consumption of spirits such as vodka. In France – the market analysed for the purposes of this paper – the gross disposable income index is growing at a rate slightly higher than the average in EU countries and was $ 27,247,00 per year per capita in 2021. In the EU countries

[21] European Commission (2022). *The Impact of Demographic Change in a changing environment* from: https://commission.europa.eu/system/files/2023-01/Demography_report_2022_0.pdf p. [Accessed 6.07.2023]
[22] Eurostat (2023). *EU's population projected to drop by 6% by 2100.* from: https://ec.europa.eu/eurostat/web/products-eurostat-news/w/DDN-20230330-1 [Accessed 6.07.2023]
[23] European Commission (2022). *The Impact of Demographic Change in a changing environment* from: https://commission.europa.eu/system/files/2023-01/Demography_report_2022_0.pdf p. [Accessed 6.07.2023]
[24] The Atlantic (2019). *Millennials Are Sick of Drinking* from: https://www.youtube.com/watch?v=MAvfnoLlfWg [Accessed 4.07.2023]
[25] IWSR (2022). *Global beverage alcohol rebounds, with value reaching US$1.17 trillion* from: https://www.theiwsr.com/global-beverage-alcohol-rebounds-in-2021-with-value-reaching-us1-17-trillion/ [Accessed 5.07.2023]

on average and in Poland at the end of 2021, it amounted to per capita respectively: $ 24,188,000 and $ 17,940,000.

Figure 9. Adjusted gross disposable income of households per capita

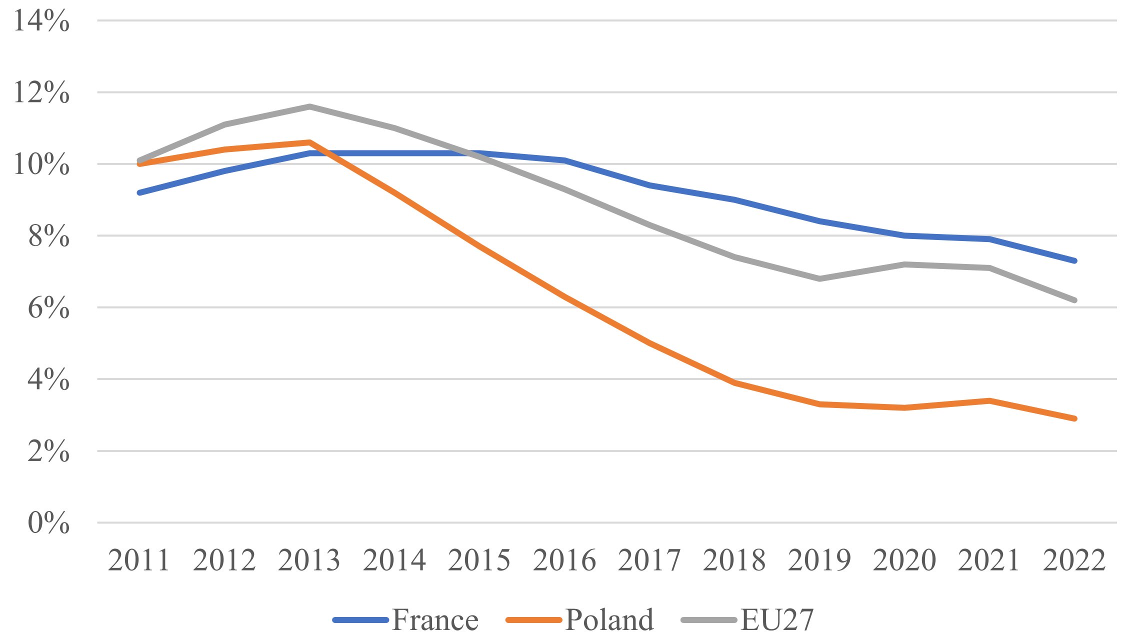


Source: Eurostat, 2022

In populations where disposable income per capita is greater, there is a stronger interest in higher quality spirits, including vodka. Conversely, in populations where disposable income is lower, demand for spirits is constrained by consumers in the marketplace due to cost-cutting and the need for increased prioritisation of expenditure according to degree of importance. Alcohol as a product associated with entertainment ranks rather low in the pyramid of essential needs for life. However, this is compounded by cultural conditions and cultural dimensions, which are embedded in tradition and highly significant for alcohol preferences in Poland. Despite the lower per capita disposable income, the demand for vodka is higher due to cultural ties and specific occasions for drinking.

Nevertheless, consumers are trying to cope with the spectre of an unfavourable economic situation and the need to reduce spending by seeking additional sources of income in order to be able to maintain their standard of living at a similar level as before. This can be seen in the unemployment rate, which is therefore steadily falling (see Figure 10).

Figure 10. Total unemployment rate



Source: Eurostat, 2022

Decreasing unemployment rates are driving demand for spirits globally. However, despite statistically increasing disposable income, its purchasing power is decreasing. This is reflected in the behaviour of consumers in Europe, who are more cautious, looking to save money as the cost of living rises and inflation depresses wages. Alcohol budgets are being squeezed along with other non-essential items such as ready meals and snacks (IWSR, 2023).

Analysts from IWSR Drink Market Analysis predict also that growing economic concerns will make home bargains even more important in the future, as the declining purchasing power of rising disposable income pushes many people to reduce visits to restaurants and bars (ibid).

Urbanisation is another demographic process, the consequences of which are reflected in market formation. In large urban centres, the availability and variety of vodka and other spirits is much greater, leading to a shift in the dynamics of increased demand towards cities. This trend is also fostered by a much higher concentration of entertainment venues, gastropubs, nightclubs or bars in cities. These manifest a high demand for spirits including vodka, which makes the availability of a wide range and choice much more extensive.

2.3.2. Rising recognition of craft spirits

Growing consumer awareness of taste, ingredients and quality, as well as the search for exclusivity, is leading to the popularisation of local distilleries, artisanal production methods and, consequently, a growing appreciation of craft spirits. The production of craft spirits – far from being a mass production – is seen by customers as being more focused on the quality of the alcohol produced with extreme care and attention to taste detail. This is because local distilleries mainly rely on producing flavour innovations by combining different herbs, spices and fruits, which are sourced from nearby farms specialising in specific grains and fruits. The whole local production ecosystem constructed in this way instils confidence and evoke authenticity in customers, who are more likely to be interested in choosing craft spirits (Mordor Intelligence, 2022).

It also involves a search for exclusivity that the consumer will not experience when choosing a popular vodka generally available at distribution points. Exploring the vodka market by tasting and sampling artisanal vodka produced in small batches allows consumers to experience local specialities and find their preferred niche while staying away from mainstream supermarket vodka. With a growing number of consumers looking for quality alternatives, the revenue generation in the craft spirits market is constantly increasing. These increases are estimated to continue into the future, with continued innovation and the introduction of new local flavours contributing to the benefit of the craft spirits market (Mordor Intelligence, 2022).

According to Saverglass Group's expertise, the craft spirits growth is mainly driven by millennials: "For that generation, the consumption of niche products, which they feel "only they" know, is an affirmation of their difference by comparison with the more classic consumption of mass-market products. In their eyes, "craft" spirits are synonym with quality. They would rather drink less, but better" (Saverglass Group, 2020).

Trend for growing craft spirits segment is also recognised by larger market players such as Pernod Ricard and Suntory Holding. They are keen to enter into partnerships with local distillers and, by giving them some autonomy, use their production infrastructure to try to cater and capitalise on the growing demand for craft options, while also being a benefit to profits (Mordor Intelligence, 2022).

2.3.3. Growing ecological awareness

In light of global climate change, EU and global environmental policy packages to reduce the effects of global warming and carbon footprint, consumer eco-consciousness is increasing. With regulatory solutions forcing companies to undergo energy transformation or reduce greenhouse gas emissions, consumers are increasingly paying attention to the importance of sustainability and are looking for products that are produced with respect for the environment.

The spirits sector, in order to maintain the trust of customers and gain the appreciation of new ones, must therefore take responsibility for the implementation of green production solutions, the use of sustainable water resources, recycling or other climate measures that are meaningful in the eyes of customers.

2.3.4. Premiumization

A consequence of the phenomena described above in the spirits consumer market, is a progressive shift towards the search for premium experiences. As with the general spirits category, vodka tends to market premium products. Consumers are willing to pay more for higher quality, locally produced and eco-responsible products while maintaining the exclusivity of experience and taste. The purchase decision is also influenced by brand image, brand recognition and product exclusivity. However, maintaining all these conditions is not straightforward in the market due to the specific nature of vodka production, as well as competition from its other segments. According to the market researchers: “The fact that vodka isn’t an aged product makes it harder for brand owners to encourage consumers to trade up, compared to the maturity-related pricing ladder that exists in Bourbon, malt Scotch, Tequila or rum. Premium-plus gins are currently growing in popularity as well” (IWSR, 2022).

While the global vodka category growth within spirits is rather flat and growth rates are forecast to remain largely unchanged over the next five years, the global premium-and-above segment is recording the highest growth within the vodka segment. It increased volumes by +6% y/y in 2022 and is forecast to grow at a CAGR of +3% in the 2022-2027 (IWSR, 2023)[26].

[26] IWSR (2023). *Vodka innovation trends* from: https://www.theiwsr.com/vodka-innovation-trends/ [Accessed 10.07.2023]

2.3.5. Growing health awareness

The consumption of alcohol, including spirits such as vodka, is not entirely compatible with leading a healthy lifestyle. Alcohol and its negative impact on the human body is constantly highlighted by various stakeholders. Vodka has no place in the promotion of healthy lifestyles and health-promoting policies. Its regular and uncontrolled consumption clearly leads to increased risk factors for addiction or chronic diseases. Despite the fact that patterns of alcohol consumption in Europe are diverse and attitudes to alcohol may differ from country to country, alcohol consumption is also at odds with the public health policies or international health organisations.

The World Health Organization (WHO) European Region is with the highest level of alcohol consumption in the world and the highest percentage of alcohol drinkers in the population. According to WHO estimates, more than 200m people in the European region are at risk of developing cancer due to alcohol abuse (WHO, 2023). Additionally, the WHO reports that in the European Region alone, alcohol contributes to 30% of deaths from unintentional injuries (such as drowning and traffic accidents) and 39% of deaths from intentional injuries (such as suicide and homicide) (WHO, 2022).

The dangerous psychological and social consequences associated with drinking and alcohol abuse, such as combining it with other psychoactive substances or unprotected sex, also indirectly play a large role in the spread of mental illnesses or sexually transmitted diseases such as HIV, AIDS or HCV. According to WHO estimates, 1m people die each year from peri-alcoholic causes in the European Region and three times as many globally.

The WHO calls the reduction of the operation of the alcohol business and the consequent reduction of alcohol consumption globally a success. One of the strategic workstreams in the Regional Plan for Implementation of the Programme Budget 2022-2023 (RPI) is the reduction of alcohol consumption through market regulation measures. The need to comply with these recommendations, conflicts with producers' desire to grow their business and puts pressure on the spirits segment by legally restricting their operation (see Table 5).

Table 5. Measures of success for the major workstreams in the RPI (excerpt)

Major workstream	Measures of success for 2022–2023
Reducing alcohol consumption	Reduced alcohol consumption in Member States by the end of 2023; success would mean: • further reduction of alcohol consumption towards a 10% relative reduction target (2025), with at least 35 Member States being below their baseline of 2010; • use of alcohol pricing, as the most underutilized best buy intervention, and alcohol marketing as key priority areas to support reductions, which have become even more important during the ongoing COVID-19 pandemic; • alcohol becomes less affordable in the Region as the number of Members States that regularly adjust the level of excise duty in line with inflation increases from 22 to 30; • reduced exposure to marketing for young people as more Member States introduce a marketing ban on the Internet for beer, wine or spirits (from 11 Member States to at least 20).

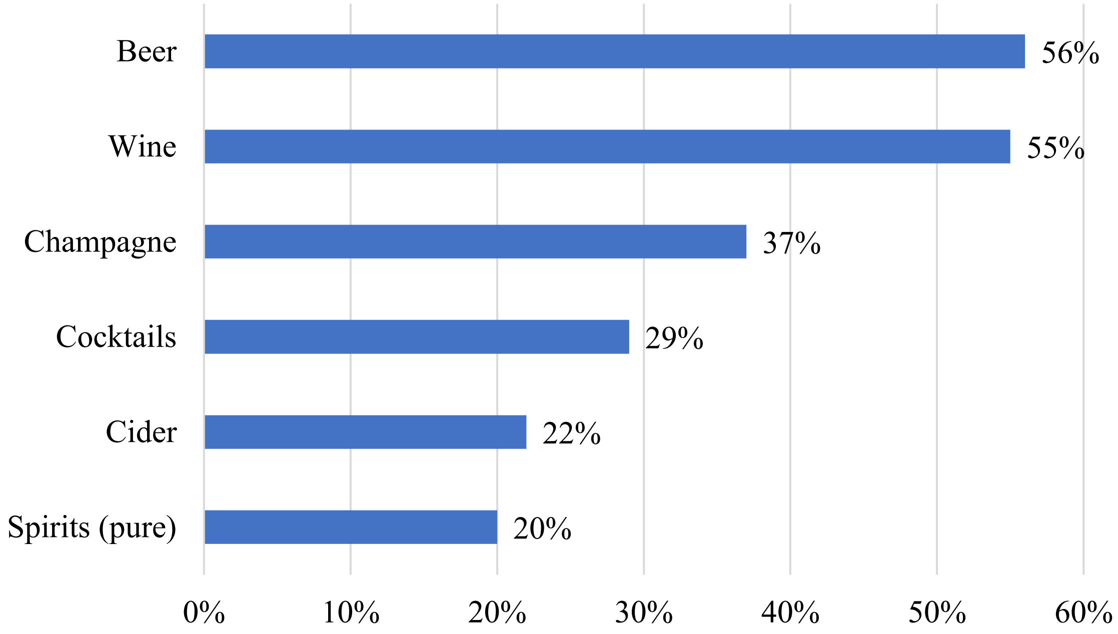
Source: WHO, 2022

The emphasis of public health-promoting policies, advocacy and awareness-raising about alcohol's harm and health effects leads to a directional shift in social trends towards the promotion of healthier lifestyles. This influences consumer tastes and choice of alcohol and may lead to a lower demand for vodka in societies where health-consciousness is higher. However, it is worth noting that this impact may vary depending on cultural dimensions and the role of alcohol in general.

2.4. French Market

Focusing on a narrower perspective and looking at the French market, it would seem that alcohol is firmly entrenched in French culture mainly through the wine and champagne segments. In fact, there are large disparities in the consumption of the different segments of the alcoholic beverages market (see Figure 11).

Figure 11. Favourite alcoholic beverages among French people in 2022 (in %)



Source: Statista, 2023

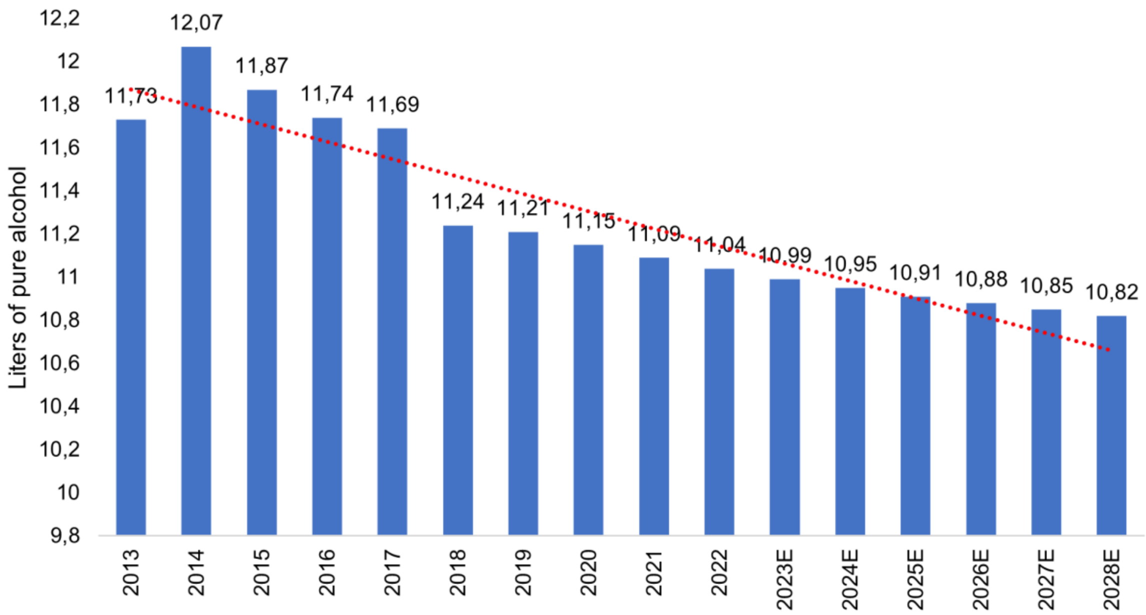
Market trends are also influenced by the LDA. Although it currently stands at 18, until 2009 it was legal to drink fermented spirits in France such as beer, cider or wine at the age of 16[27].

The French also drink the most days per year in the world: 132 days per year and an average of 2.5 per week (GDS Global Report, 2021). Despite the fact that the French consume the most alcohol per year in terms of number of days, general consumer trends speak of moderation and selective drinking due to rising inflation and saving strategies (IWSR, 2023).

This can be seen clearly in the French consumer market, where per capita alcohol consumption has been falling continuously for years (see Figure 12). It is expected that this trend of slow decline will continue over the next 5 years (Statista 2023).

[27] The Guardian (2009). Prohibition for French teenagers as new laws approved to curb 'le binge drinking' https://www.theguardian.com/world/2009/mar/13/france-teenage-drinkers-alcohol [Accessed 12.07.2023]

Figure 12. Consumption of alcohol in France from 2013 to 2028E per capita



Source: Statista (2023)

2.5. Polish vodka positioning

Due to its strong cultural and historical tradition of vodka production, it is gaining recognition among foreign consumers. It is often associated with authenticity, artisanal production and great taste. Perceived more as a relatively well-priced but very high quality product, it is associated with Polish cultural significance in the minds of foreign consumers. This heritage and strong good reputation is linked to the perception of vodka from Poland with authenticity and craftsmanship and an inherent symbol of Polish culture. These elements are deepened by the presence of Polish brands, which are successfully gaining the recognition and loyalty of consumers.

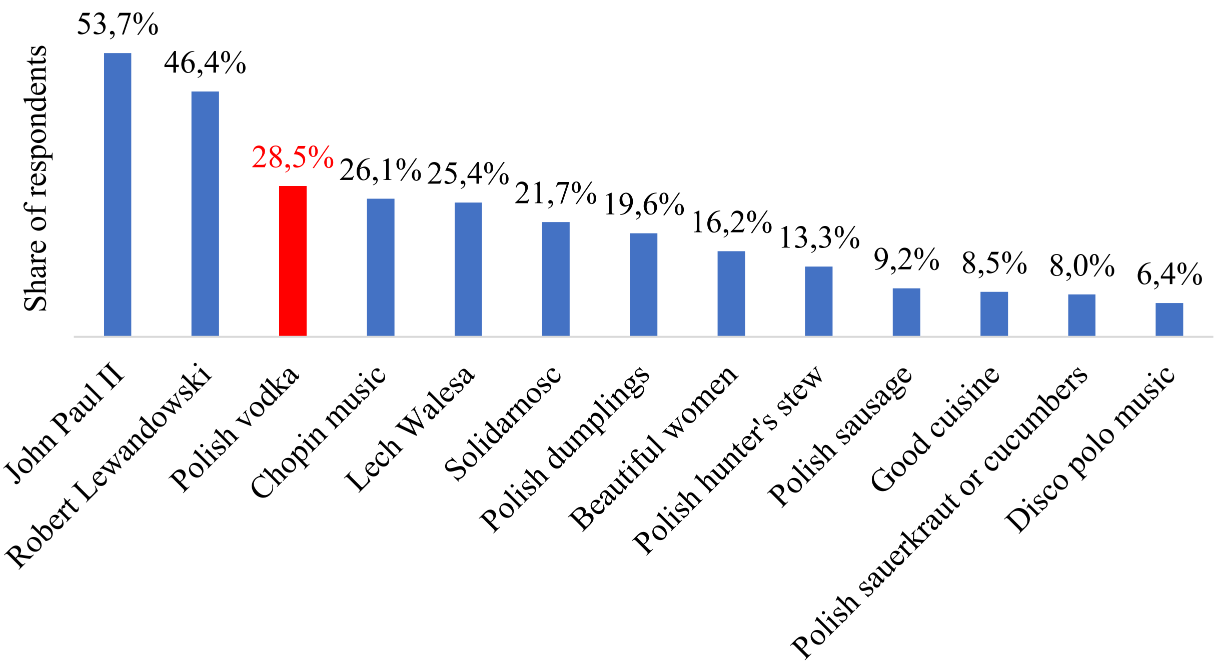
The spirits sector is also an extremely important pillar of the Polish economy. Annual production of Polish vodka exceeds 1mn hl. It is carried out with the participation of around 95% of small and medium-sized enterprises, and the export value of Polish spirits amounts to € 176mn[28], led by France in premium segment in the recent years.[29]

[28] Polish Vodka Association (2022). *Polish vodka: facts and figures* from: https://pva.org.pl/pva_drupal/en/polish-vodka/statistics [Accessed: 12.07.2023].

[29] Global Trade Daily (2020). France is the Major Market for Premium Vodka from Poland, Purchasing $99M or 62% of Its Total Exports from: https://www.globaltrademag.com/france-is-the-major-market-for-premium-vodka-from-poland-purchasing-99m-or-62-of-its-total-exports/ [Accessed 6.09.2022]

Polish vodka is strongly rooted in the minds of foreign consumers. Research by the Polish Vodka Association (PVA) shows that it features in the top 3 elements of Polish culture that are associated abroad. Interestingly, it is the first product indicated on the list. The first two places are occupied by Poles well known abroad: John Paul II and Robert Lewandowski (Polish Vodka Association, 2022).

Figure 13. Words associated with Polish culture among foreigners



Source: Polish Vodka Association, 2022

The PVA research also indicates that Poles are most likely to buy Polish vodka (44.3%) for their friends from abroad (ibid). Unsurprisingly, the perception of Polish vodka is therefore quite strong on western markets.

Chapter 3. Research Methodology

This chapter describes the research methodology, which was based on conducting a market survey among French adult consumers (See: Appendix 1 and 2). The results of the research, the methodology of which is described below, was analysed in detail in the Chapter 4.

3.1. Research Questions

The thesis will try to answer the following research questions:

- **Research Question (RQ) 1:** What are the factors shaping the purchase of Polish vodka by the French consumer?
- **Research Question (RQ) 2:** What is the role of country-of-origin in consumer's decision?

The overarching aim behind this research is to define the internal and external factors that influence the French consumer's decision to purchase vodka imported from Poland. More detailed points have been gathered below to help achieve the main goal of the research. They all contribute to a comprehensive answer to the research questions. The research aims to:

1. Identify the internal factors that influence the purchase of Polish vodka by French consumers
2. Identify the external factors having impact on the purchase of Polish vodka by French consumers
3. Explore the level of availability of Polish vodka to French consumers
4. Get to know the motivations of Polish producers and their analysis of the French consumer in the context of the export direction of Polish vodkas
5. Identify the customer targeting by Polish vodka producers in the French market
6. Investigate possible alternatives to Polish vodka in the French alcoholic beverages market that consumers could choose when deciding to buy vodka.

3.2. Research Methods

French adult consumers of different ages, from different sizes of urban centres and with different levels of education originating and living in metropolitan France was surveyed in detail from the point of view of their vodka consumer choices by means of a questionnaire. The survey included questions on the recognisability of Polish vodka, brand loyalty and factors that determine vodka choice. The questionnaire of the survey (See: Appendix 1) contained 19 questions divided by 3 following parts:

- Introduction (5 questions);
- Vodka preferences of French consumer (9 questions);
- Perception of Polish vodka by French consumer (5 questions).

The questionnaire contained a varied form of questions. It included questions with both single-choice and multiple-choice options. Respondents in the questionnaire also had to answer to the open questions, rate the aspects analysed on a scale of 1-5, and rank the items according to importance.

Due to the narrowing target audience of the survey, the questionnaire was created, and distributed in French language. The study was conducted online using the Kozminski University Survey System supported by Lime Survey software from 18 April 2023 to 19 May 2023. Through a questionnaire distributed by various digital channels, 97 complete responses were collected during above-mentioned time period. Respondents were entirely random and the anonymised data collected in the survey is confidential. They were not used in any other scholar work or made available to potential stakeholders in any form.

3.3. Methodological approach

The main aim of the research was to gain a better and more accurate understanding of the analysed phenomenon of the French consumer choices in the context of purchasing Polish vodka by discerning the alcohol industry and freely questioning a section of the French population by means of a questionnaire. The research approach is therefore qualitative in nature.

The qualitative research uses both a deductive approach of research defining hypotheses based on available theories and then testing them using empirical data and an inductive approach in the case of a survey addressed to French consumers. The research strategy is maintained through the qualitative data analysis.

3.4. Data collection and analysis

The research was based on primary and secondary resources. Primary research was conducted through the own survey of French people at different ages regarding their consumer choices of vodka. Furthermore, secondary research was conducted using statistical data, previous research findings, reports, and governmental law analysed in terms of the regulatory framework within which spirits industry operates.

The qualitative method best suits the objectives of the research. This is precisely why it was chosen for the research. It focuses more on the opinions and subjective feelings of the respondents than on strict statistics and specific numbers. This allowed to obtain the developed opinions of French consumers, as well as to learn about their image and their positioning in the business strategies of Polish vodka brand owners. Conducting a blended survey with open, and multiple choice questions have also given respondents more freedom to express their personal opinions.

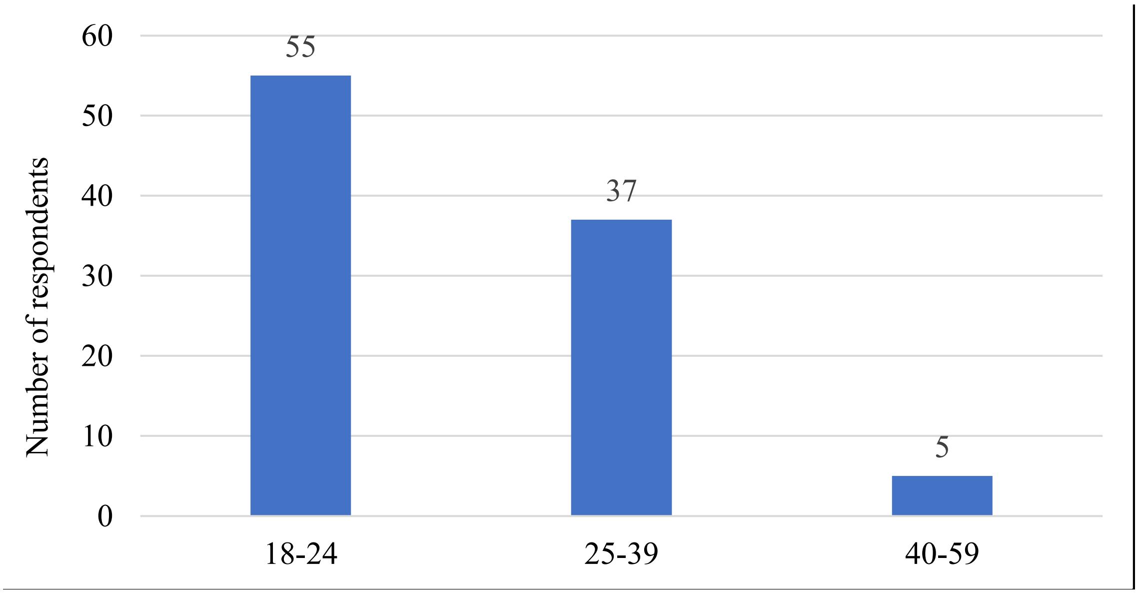
Chapter 4. Research Analysis

Through in-depth research based on free-access scholar resources, reports and publicly accessed data and a detailed study of the French consumer market, it was expected that Polish vodka is finding and will find increasing numbers of consumers on the French market, its reputation will grow in France as will its high position in terms of sales. There was also an opportunity to learn about the current factors which influence the purchase of Polish vodka in France, which is a valuable conclusion for Polish exporters who plan to expand into the French spirits market. It was also expected that survey respondents will confirm the theories cited in the literature review on trends in consumer behaviour, the role of the country of origin as well as the importance of brand recognition.

4.1. Demographics

Due to the specific nature of the survey's digital distribution channels, the majority of survey respondents are French young adults in the 18-24 (56.7%) and 25-39 (38.14%) age groups. The rest of those who took part in the survey fall into the 40-59 age bracket (5.16%) (see Figure 14).

Figure 14. Age of survey respondents

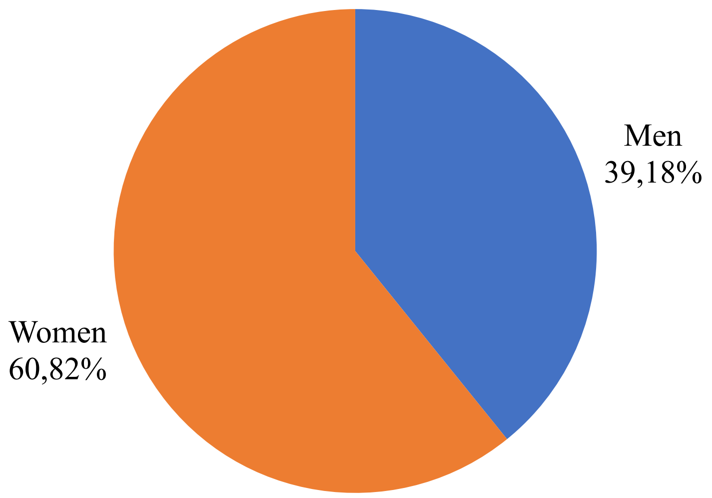


Source: Own study

Almost two thirds of the respondents were women (see Figure 15). Also, the vast majority of respondents have an undergraduate degree or higher education level (93.81%).

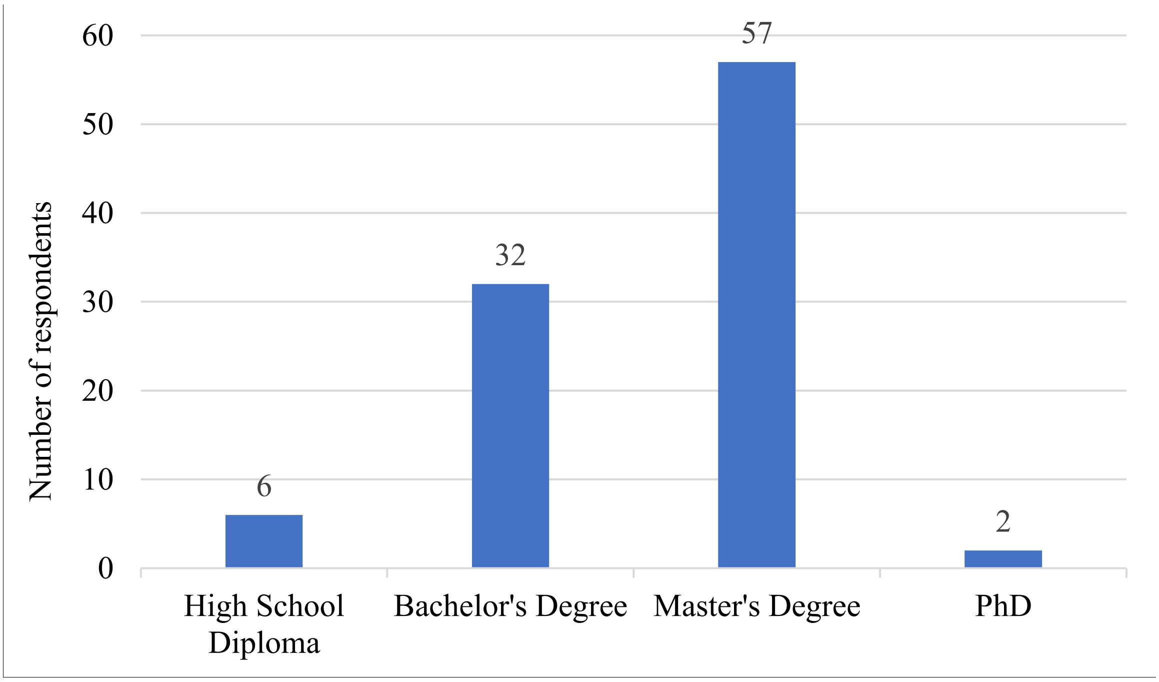
The remaining are respondents who have not completed a university degree and hold a high school diploma (6.19%) (see Figure 16).

Figure 15. Gender ratio of survey respondents



Source: Own study

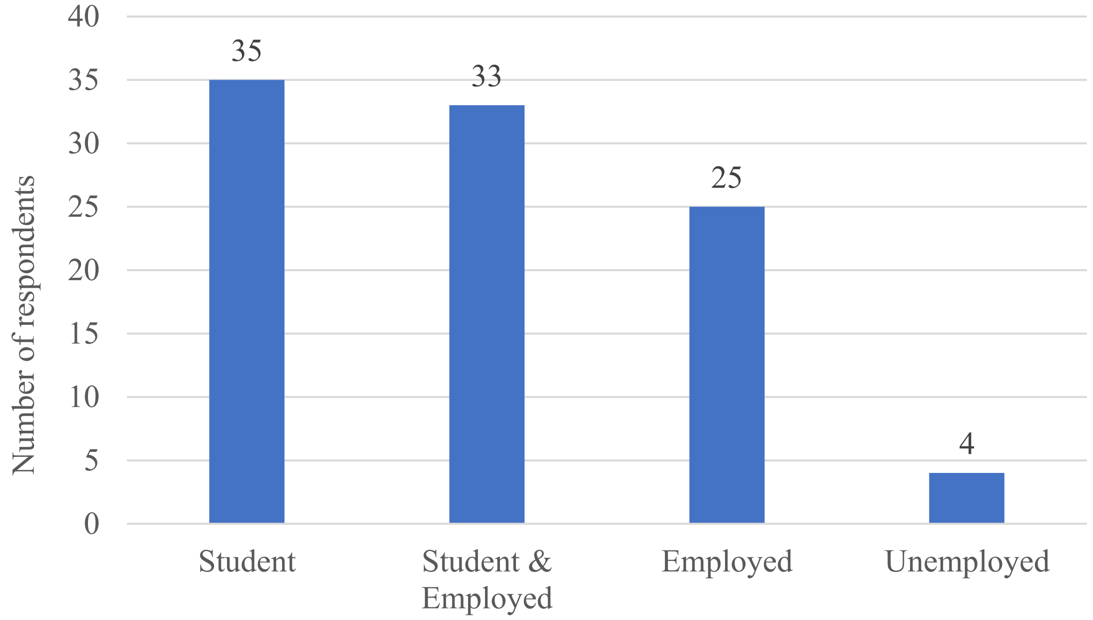
Figure 16. Education background of survey respondents



Source: Own study

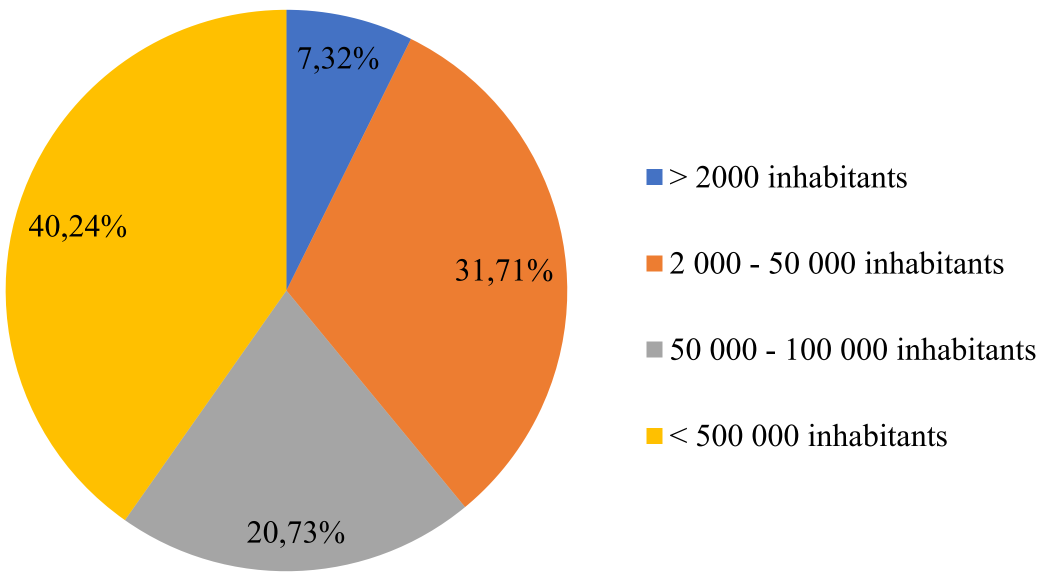
The majority of respondents are studying or combining work duties with university studies. The second important group is the employed. A small percentage of respondents are neither studying nor employed (see Figure 17). The largest group of respondents live in cities with > 500,000 inhabitants (see Figure 18).

Figure 17. Occupation situation of survey respondents



Source: Own study

Figure 18. Percentage of survey respondents by residence centre size



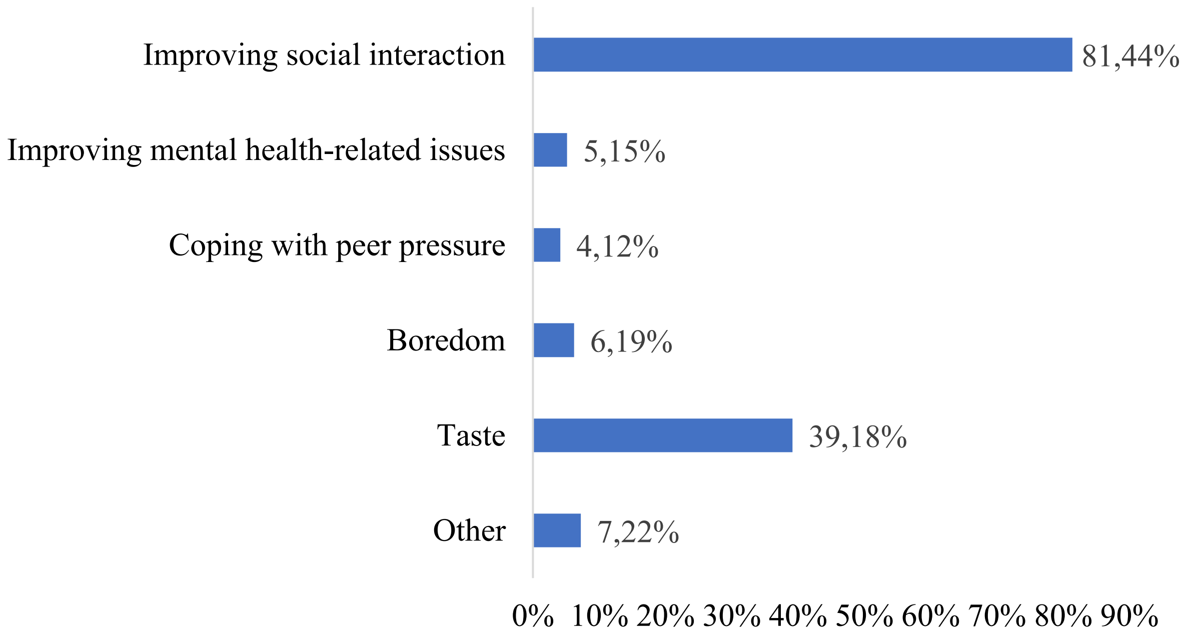
Source: Own study

4.2. Vodka general preferences

On a 5-point scale where 1 is the lowest preference and 5 the highest, rate vodka at 2.89 level. The rating is therefore rather average or neutral and may suggest that vodka is not the alcohol of first choice for the group surveyed. Based on the assessment, no clear trend can be distinguished which may reflect the varying attitudes towards vodka among the respondents.

Due to the fact that the respondents to the survey are largely relatively young people combining work with studies or only studying, representative results concerning the reasons for vodka consumption may refer to this group and not be a sufficient reflection of the general population. Nevertheless, quite significant trends can be observed. Respondents indicate that they drink vodka mainly to improve social interaction. Qualitative time with friends or simply having fun is often associated with vodka consumption among the group surveyed. The second factor that was indicated most often is taste. This may suggest that respondents value vodka for its taste both pure and as an ingredient in drinks, and drinking alcohol helps them to relax, improves their mood and reduces social barriers making them more extrovert and open to conversation. This can lead to freer communication and better fun among friends. The next indications: boredom, mental health-issue or peer pressure are far behind (see Figure 19).

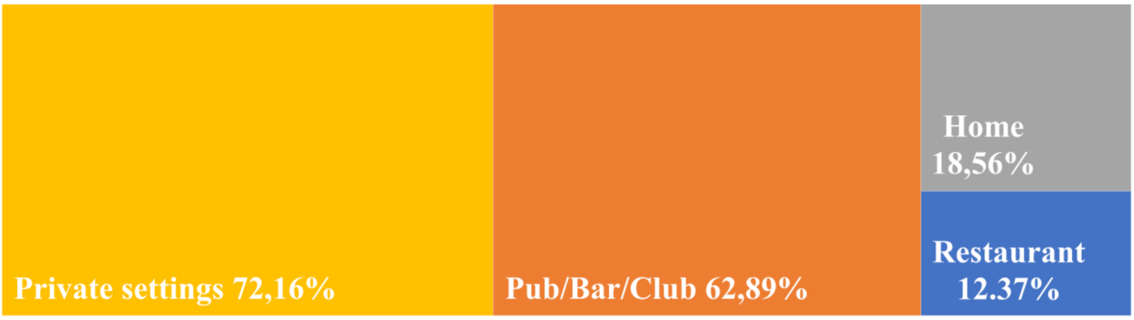
Figure 19. Reasons for drinking vodka of survey respondents



Source: Own study

Vodka is consumed by respondents both in private settings such as family gatherings or house parties, but also in entertainment and catering establishments (see Figure 20). This may mean that vodka consumption is associated with spending pleasant moments with relatives and friends. Both family reunions, friendly gatherings in bars or restaurants, as well as parties in clubs are accompanied by a relaxed and casual atmosphere for relaxation and well-being. Vodka can be seen as an integral part of these type of gatherings.

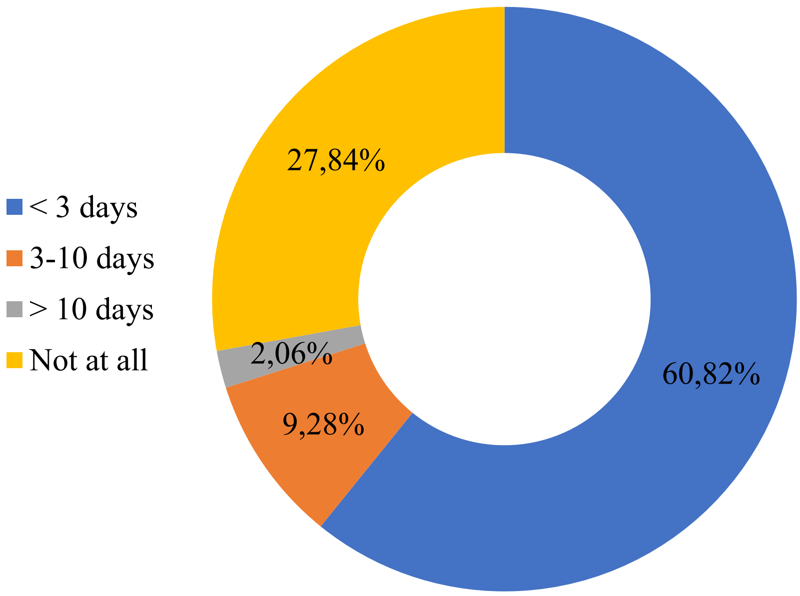
Figure 20. Vodka consumption places of survey respondents



Source: Own study

Despite the above preferences as to where and why, survey respondents during the typical month report drinking vodka in small quantities. More than 60% admit to drinking less than 3 days per month and almost one in three respondents do not drink at all during the typical month.

Figure 21. Vodka drinking days during typical month of survey respondents



Source: Own study

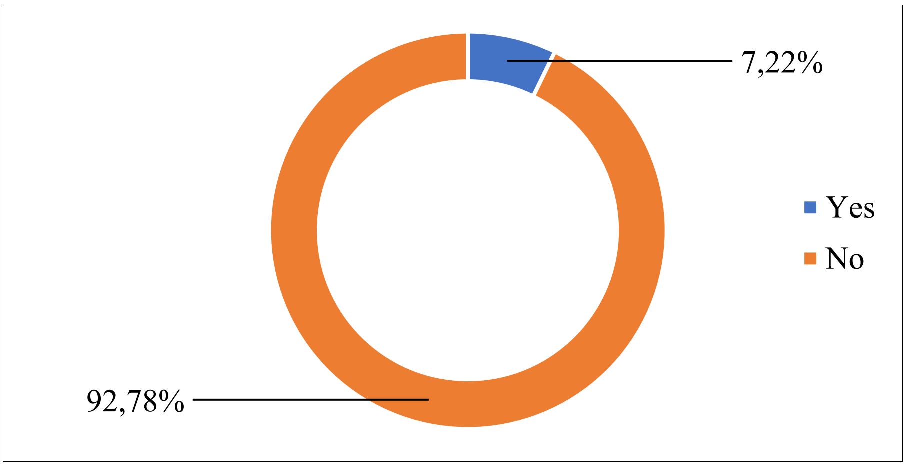
The research also explored the factors that influence more and less the choice of vodka brand. Among respondents, price was the most common factor most influencing their choice. On average, the second most common factor chosen by respondents was taste and quality. This was followed with an increase in eco-consciousness by packaging and sustainability. The results also confirm that country of origin is of negligible importance when choosing a vodka for a group of respondents. Heritage is of least importance (see Figure 22).

Figure 22. Average factors order that influence choosing a vodka brand

Source: Own study

More than 90% of French respondents also answered that French vodka was not among their most preferred choices, which further demonstrates the lack of influence of country of origin on the purchasing decision (see Figure 23).

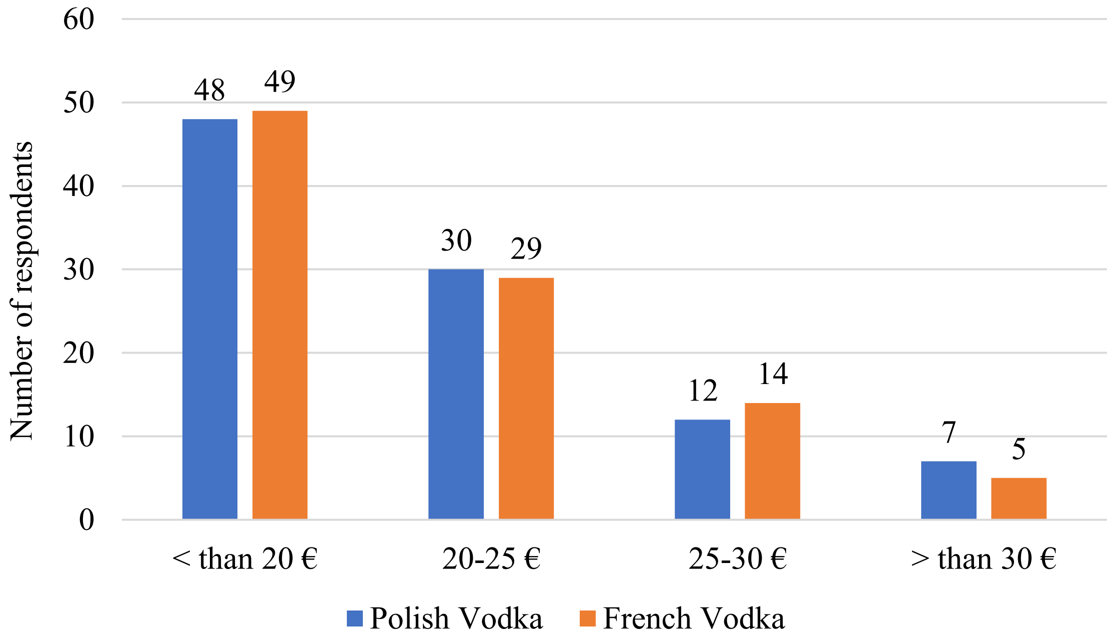
Figure 23. French vodka as favourite among survey respondents



Source: Own study

In a comparison regarding willingness to pay for a 70 centilitre (cl) bottle of Polish and French vodka, the survey results are very similar. For both French and Polish vodka, the majority of respondents are able to pay less than € 20, with the remainder of respondents falling within the € 20-25 range. Correspondingly, there are fewer in the higher price brackets (see Figure 24).

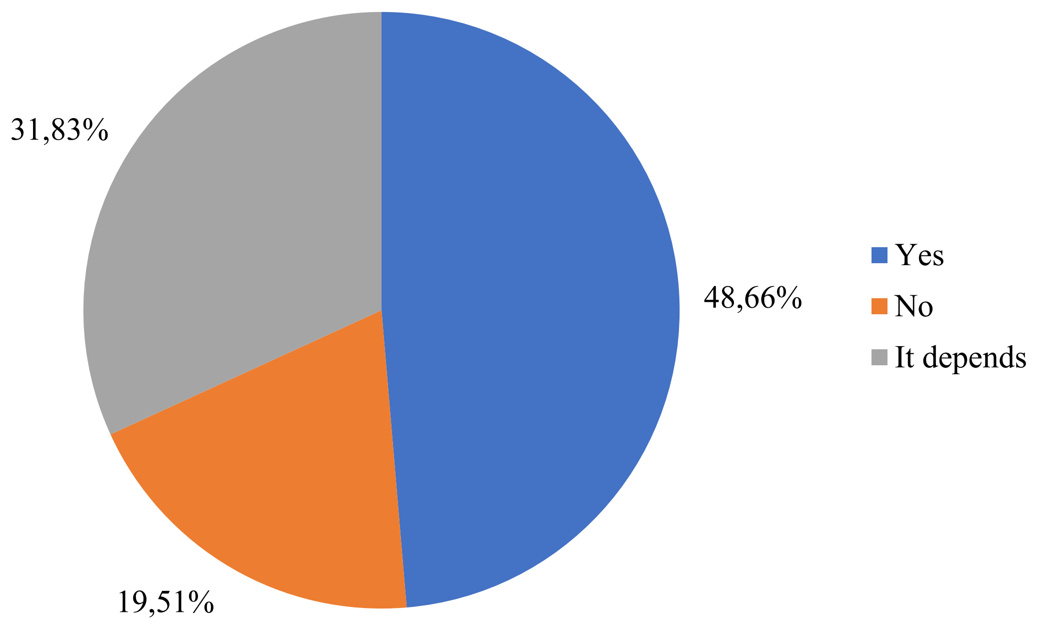
Figure 24. Willingness to pay for a bottle of vodka by survey respondents



Source: Own study

These indications may show that the group of French consumers surveyed does not pay attention to the country of origin of the vodka and does not attach special importance to the indigenous production of vodka. More than the country of origin, respondents attach importance to local production and small distilleries (see Figure 25). In the case of craft vodka, they mostly declare that they are able to pay more (49%). However, there is also a group of people who require more thought or more information from such a decision (32%).

Figure 25. Willingness to pay more for craft vodka among survey respondents



Source: Own study

4.3. Polish vodka perception

Respondents were asked to give three words that they associate with Polish vodka. The results show some general associations that French consumers hold in their minds. The words that were most repeated in the responses were:

- strong (French: forte) – occurred 33 times;
- quality (French: qualité) – occurred 19 times;
- alcohol (French: alcool) – occurred 12 times;
- taste (French: goût) – occurred 10 times;
- party (French: soirée), cheap (French: pas chère), good (French: bonne) – occurred 8 times each.

It is noticeable that the connotations are varied and include words referring to brands of Polish vodka (Bocian, Chopin, Zubrowska/Zubrovska[30], Ostoya, Belvedere, Sobieski, Soplica), as well as words of non-Polish origin but associated with Poland (Poliakov). There are also single words associated with Polish culture (Nasdrovia[30], Slavic, Bison, Mountains) and persons associated with Poland worldwide (Walesa, Lewandoski[30]).

[30] Original spellings according to respondents' answers.

Another group of words that can be distinguished are those related to the production methods and reputation of Polish vodka (Quality, Potato, Heritage, Origin, Classic, Savoir-faire, True taste, Artisanal, Handcrafted, Distillation) and the various occasions for its consumption (Party, Erasmus, Evening, Cocktail).

The figures below (Figure 26 and Figure 27) show all the responses collected, and those with the most responses are highlighted: the larger the caption, the more responses appeared in the survey.

Figure 26. Words-associations with Polish vodka in French among respondents

Source: Own study

Figure 27. Words-associations with Polish vodka in English among respondents

Source : Own study

Respondents were also asked to rate the factors towards Polish vodka on a scale of 1-5, where 1 is the lowest rating and 5 the highest. The table below shows the averaged results of the individual statements in the form along with the standard deviation.

Table 6. Factors associated with Polish vodka and their rating among survey respondents

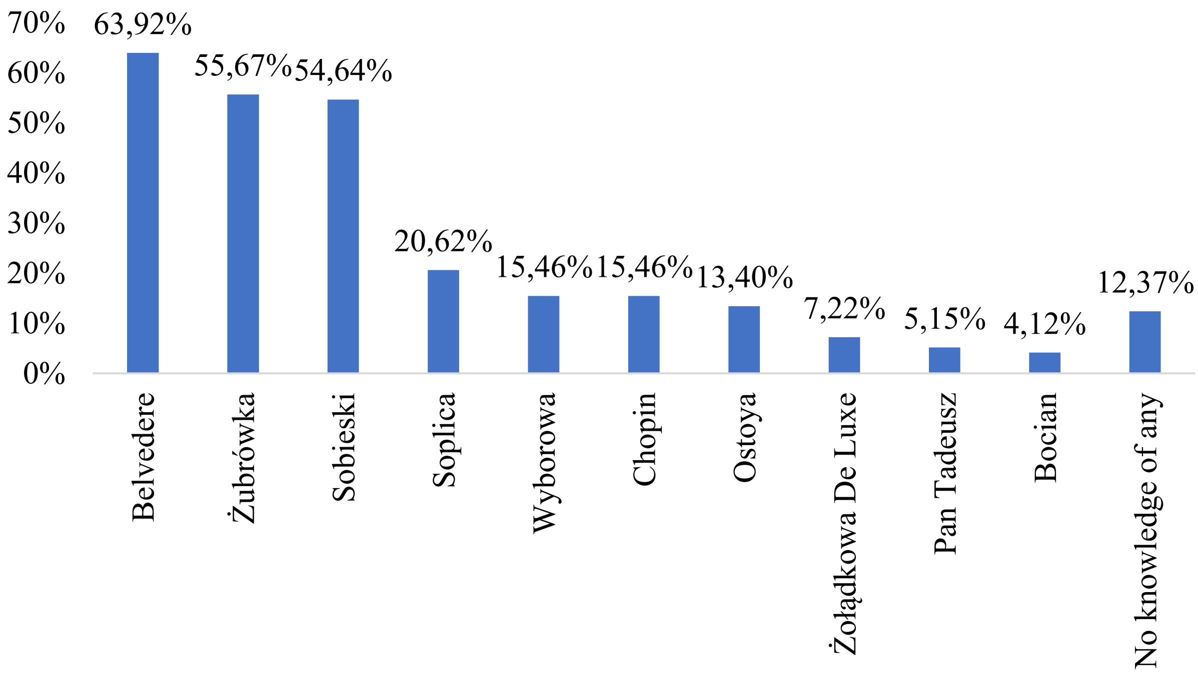
Factor	Average grade	Standard deviation
Premium product	3.05	1.0
High quality	3.62	1.07
Option as a receiving gift	3.1	1.29

Well-known in other countries	3.71	1.27
Reputation	3.62	0.99

Source: Own study

On average, the most important factors that French consumers have in common with Polish vodka are: recognition in other countries, high quality and high reputation. The situation with recognition of Polish brands by the French is also at good level. Among those the most recognisable coming originally from Poland, the respondents indicated those whose presence abroad is quite strongly accentuated. In the lead were: Belvedere, Żubrówka and Sobieski (see Figure 28).

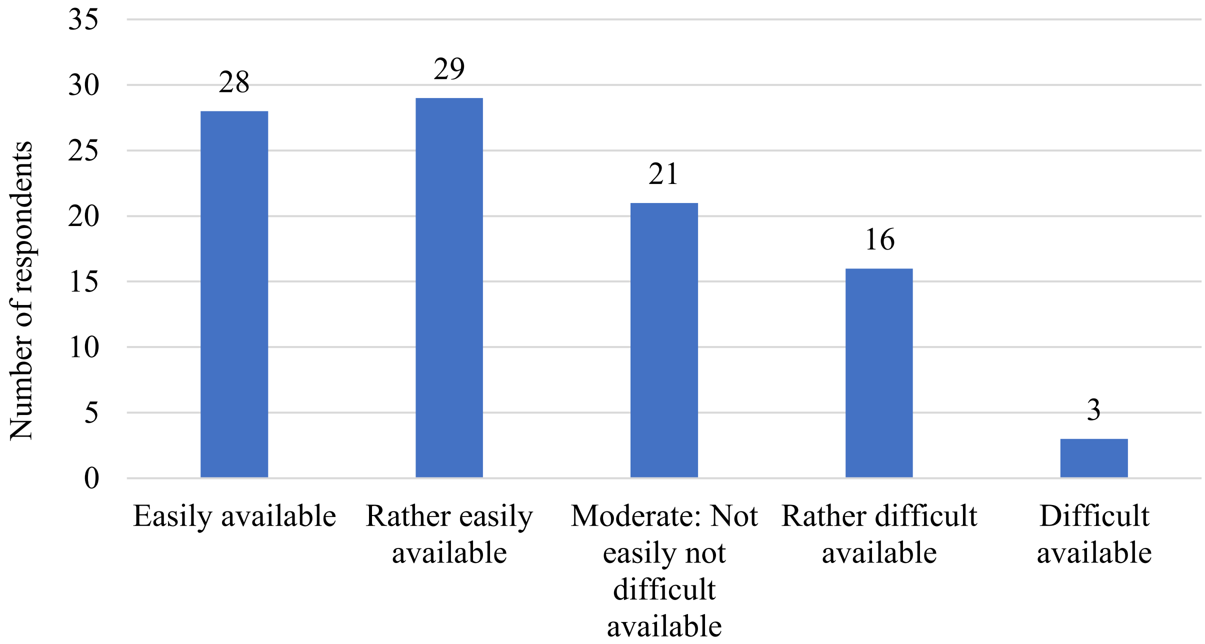
Figure 28. Most known vodka brands originally from Poland by survey respondents



Source: Own study

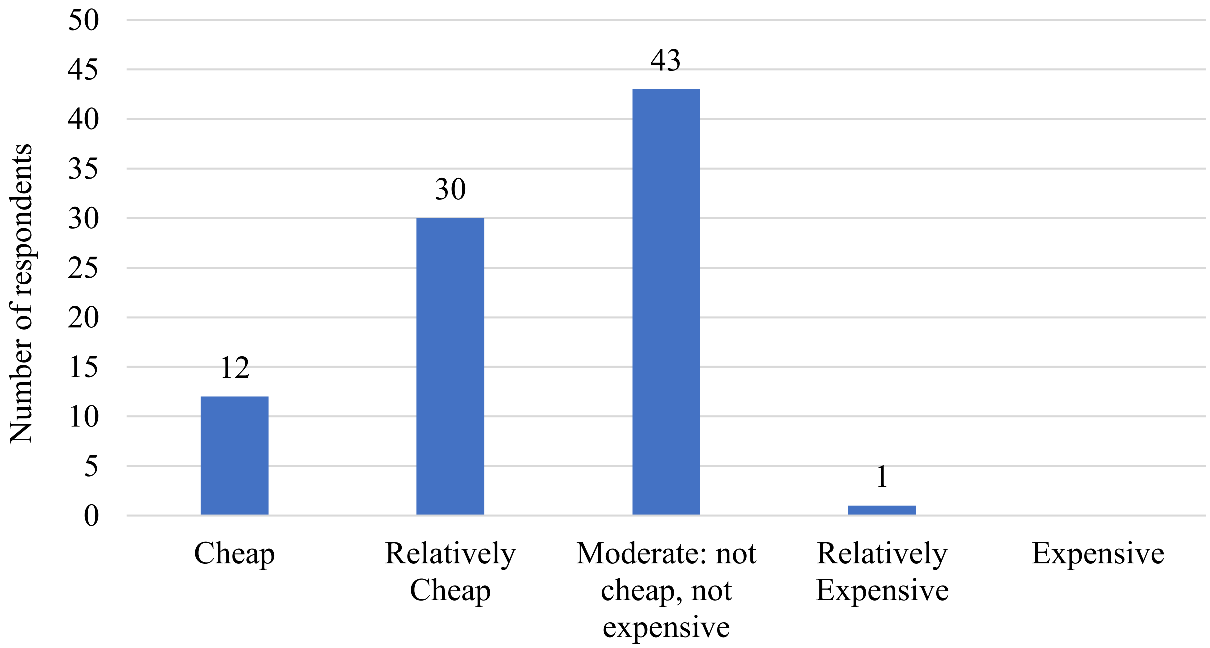
French consumers also assess that Polish vodka in France is rather easily available in distribution chains. The perception of Polish vodka on the French market can be seen in below figures. French participants in the survey also mostly consider the price to be moderate or rather cheap, although these opinions are divided when compared with the words that often appeared as those most associated with Polish vodka: “cheap” vs. “expensive” (Figure 27).

Figure 29. Availability of Polish vodka on the French market by survey respondents



Source: Own study

Figure 30. Price rating of Polish vodka in France by survey respondents



Source: Own study

4.4. Summary

Respondents' drinking habits are limited to consuming vodka less than 3 times in an average month. Although respondents drink relatively little, they identify vodka consumption mainly with meetings with relatives, family and friends, spending time together in an informal atmosphere of relaxation and leisure. French consumers participating in the survey value above all the taste of vodka as an integral part of social interaction. Vodka is consumed by them mainly in private settings and entertainment venues.

Polish vodka is largely associated with a product of above-average class, which is, in a way, a carrier of Polish culture and tradition. French consumers surveyed are well associated with Polish vodka brands, which are more strongly present on French shelves and in retail distribution channels. Its availability is assessed by respondents as rather easy, and the price of Polish vodka is assessed as relatively cheap and they are able to pay statistically less than € 20 for a 70 cl bottle. It is still the price that is the most important factor in choosing vodka, although those related to quality and sustainability trends are also high. Therefore, for the most part, the French declare in the survey that they are able to pay more for vodka from a local distillery. After all, in a small production facility, it is easier to maintain quality standards while caring for the environment.

Chapter 5. Conclusion

This chapter will summarise the empirical findings in detail and describe the main conclusions of the thesis. Moreover, answers the stated research questions will be provided. After presenting those, it will be possible to describe the limitations that were encountered during the research and study, as well as areas of managerial implications and fields of future research, in order to explore the topic in more depth.

5.1. Research results discussion

- **Vodka is not the first choice of alcohol among French consumers**

The characteristics of the French spirits market and the wide range of alcohol products mean that vodka is one of the many varied alcohol choices. The underlying research shows that it is not the first choice in France. This is influenced not only by a diverse drinking culture conditioned by the multitude of different types of alcohol, but also by French cultural preferences, among which vodka is not firmly entrenched and gives way to wine, champagne or beer. However, vodka is gaining recognition as an ingredient in drinks. This trend of vodka-based cocktails makes it figure on the French market as a multipurpose spirit.

- **Price, taste and quality mainly determine choice of vodka**

French consumers seek a balance between their desired taste preferences, the perceived quality of vodka and the price they are willing to pay. Price is the main factor that determines French consumers' choice of vodka. Having different budgets, economic factors and a varied distribution of household spending means that the French choose the vodka that suits their price range. Research has shown that the French are willing to choose vodka with a lower price (> € 20) than to invest in a higher-priced product. Unless it is a vodka from the craft segment. Price should go hand in hand with taste and quality. These two factors are similarly important to French consumers. The flavour profile of the vodka and the high quality are factors that interact and influence the purchase decision process. Brand reputation and recommendations also play a large role in this context. On the other hand, country of origin factor has no significant impact on choice of vodka.

- **Customers are able to pay more for craft spirits**

The French and their consumer choices are in line with the demand trends for craft spirits. A large proportion of those surveyed are willing to pay more for craft vodka. This is influenced by various factors: the artisanal production, the uniqueness of taste and product, as well as the exclusivity and limited availability of craft spirits, which, combined with the craftsmanship of production, enhance authenticity and personalise the experience. Along with this comes the background of sustainability and the environmental practices of craft distilleries, which tend to treat ethics more than large corporations. The use of local raw materials, organic production methods or the use of organic ingredients in the local production ecosystem make small local spirits gain in the eyes of environmentally conscious and socially responsible customers.

- **Vodka is associated with a relax, quality time among relatives and friends**

The consumption of vodka is associated with a time of relaxation spent with family or friends. Alcohol is intrinsically linked to the celebration of meals and shared moments together in different contexts (private settings, partying in a club, etc.). French respondents indicated that they drink vodka mainly to improve their social interactions and have a good time. This demonstrates that vodka creates a sense of unity and helps to create bonds by emphasising the importance of shared experiences and the creation of good memories.

- **Vodka is a symbol of Polish culture abroad including France**

Among those surveyed, vodka evokes clear associations with Polish tradition and culture, behind which stands a centuries-old and ingrained tradition of producing high-quality vodka. According to the research material collected, Belvedere, Żubrówka, and Sobieski are the most recognised Polish vodkas, which have also gained recognition in France. Thanks to their global distribution and their reputation as premium products, they have contributed and continue to contribute to associations with Polish culture and high quality.

5.2. Research Limitations

One of the most significant limiting factors was a very hermetic and hard-to-access environment of managers and Board of Directors of companies holding Polish vodka brands in their product portfolio (Wyborowa Pernod Ricard, Stock Polska, Maspex). Dozens of attempts were made to arrange an interview on the expansion of Polish vodka product offer from Poland to France. Despite assurances of maintaining information confidentiality for the purposes of this research, managers were sceptical about the proposal of meeting and hid behind lack of time, excessive professional duties, and – above all – the confidentiality clause of the company’s data, which prevented them from sharing specific insights based on exports/imports data, sales results of Polish vodkas and business objectives in the short and long term. Most likely for fear of using the above-mentioned data for commercial purposes, they declined to comment for purposes of this paper. As a result, it is extremely difficult access to up-to-date statistics, which makes it very problematic to penetrate the market in seeking information on the performance of the Polish vodka portfolio by particular companies.

Another limitation during the collection of research materials was the distribution and acquisition of respondents to the survey. From the perspective of the Polish researcher, the strong narrowing of the target group to a specific market, i.e. the penetration of the French consumer market through empirical research, was a challenge due to the limited availability of online tools to reach the widest possible range of French adult consumers in a short period of time. Furthermore, despite distributing the survey in the target group's native language, some of the recipients completing the survey did not take a professional approach to the task. Consequently, some of the survey responses were incomplete, certain questions were omitted, which could not be considered complete research material. The incomplete part of the acquired surveys, representing around 30% of the total responses, was omitted from the analysis described in Chapter IV.

The surveyed topic concerning consumer preferences on the vodka market in France and the performance of Polish brands was also sometimes blocked by administrators of social media portals due to alleged violation of rules and Terms and Conditions of the portals due to the features of alcohol promotion and other issues related to the promotion of alcoholic products, which additionally made it difficult to reach the target group of the survey.

There is also a risk of misunderstanding the appropriateness of the questions asked. Respondents may not understand the questions in the questionnaire and may not understand the point of answering them. Although the questionnaire was prepared with due care, respondents may have misunderstood the wording of the questions and thus answered inconsistently with the intentions of the questioner. This may have affected the quality of the survey. It should be also noticed that the survey distributed to French consumers, may only be exploratory in nature, which is not representative of the French population as a whole and may not reflect general trends in vodka choice. Deeper work that links vodka consumption patterns in France and French customer choices would be needed.

Furthermore, there are limited secondary resources carried out in Poland on the French alcohol market and the consumer making consumer choices in this market. Most of the available studies consider Polish food exports as such, while there is a lack of publicly available research on the French alcohol consumer and a limited number of reports produced by Polish ministries and authorities on Polish vodka export data to France.

5.3. Managerial Implications

This thesis provides some managerial implications to help spirits managers with product development in the French market and to answer the question of whether France is a good market to develop their portfolio and internationalise individual brands there. The implications in terms of practical advice have been collected and arranged thematically below.

1. **Forming marketing strategies**

The paper and its findings highlight the perception of Polish vodka brands among French consumers. Managers are thus able to adapt their brand recognition strategy and raise brand awareness based on information about the value, quality and product characteristics that French consumers value and that resonate well in this market.

Empirical research data can also be helpful in creating and developing marketing, communication strategies and advertising campaigns in various digital and offset distribution channels. The data can be used to optimally select distribution channels to reach vodka products visibility within target group and facilitate their accessibility. Data on consumer behaviour, purchasing patterns and perception of Polish vodka will allow advertising messages to be adapted in an effective way to reach the target audience.

The above-mentioned marketing implications are also linked to good market segmentation and estimating which market group would be most interested in the product line of the company represented. Managers can use the insights contained in this work to better tailor and define their product offering to specific consumer market segments in France, e.g. the frequency of young people consuming premium vodka or adults buying vodka for savouring purposes.

2. **Economy processes impact**

Understanding the background to the economic processes described in this thesis, which affect the global spirits markets to varying degrees, may help to highlight some negative and positive market trends, albeit in a small way. This will allow to more accurately frame strategies for the development of individual brands in the product portfolio in emerging markets, where the vodka segment seems to be gaining the most value.

3. **Price sensitivity**

Knowledge of the recognition level of Polish vodka brands and their perception as a premium product, as well as information on the price French consumers would be willing to pay, can be used by managers to define pricing strategies for Polish vodka in France. This provides a good basis for analysing price sensitivity, better market segmentation and adjusting product pricing to specific target groups so that sales are associated with maximising profitability.

4. **Innovative product development**

The findings contained in this paper can be used by managers to gain a better understanding and appreciation of the perception of Polish vodka by adult French people. By using this knowledge in a practical way, it is possible to innovate, improve Polish spirits products and create new ones that are more relevant to the needs of the French spirits market and its consumers.

5. **Internationalisation of Polish vodka brands**

The positive reception of Polish vodka among the research group of French consumers should be perceived as an opportunity to intensify international expansion of distribution channels or operations in this direction. This could be based on establishing partnerships with local distributors or setting up business contacts with French market leaders in order to better penetrate the market and explore opportunities to increase market share.

5.4. Future research

Given the difficulties in accessing confidential company information and the high reluctance of senior-level managers to share export data, sales data and strategic plans in the short and long term, it would seem necessary to obtain employment from one of the companies with Polish vodka brands in their portfolio. This would significantly speed up the research due to the relatively easy access to strategic key performance data. It would also make it possible to learn about the company's attitude to the activities of the competition and its analysis in the context of activities on export markets. As a consequence of these actions, it would become possible to obtain a more complete picture of the French consumer in the eyes of Polish strategists and of Polish vodka exports to the Seine and the appropriateness of expanding them.

Having first analysed the needs of the specific company and their product offering in the spirits category, a further in-depth study of the French consumer market is required, targeting the segments of greatest interest to the company. Depending on the amount of financial resources and the scope of the study – in order to obtain a more numerous and more diverse research group in terms of age, region of origin, size of centre of residence, etc. – it would be advisable to carry out research in cooperation with a leading French opinion poll centre on a sample of > n=10,000. This would make it possible to study the French consumer market in more depth in terms of preferences concerning Polish vodka and expand managerial implications.

Appendices

Appendix 1. Market survey questionnaire template in French

PARTIE 1 – Introduction

P1Q1: Veuillez indiquer votre âge

- 18-24 ans
- 25-39 ans
- 40-59 ans
- 60 ans et plus

P1Q2: Sexe:

- Homme
- Femme
- Non binaire
- Je préfère ne pas dire

P1Q3: Quel est votre dernier niveau d'études complet ?

- Diplôme d'éducation secondaire
- Licence
- Master
- Doctorat
- Sans diplôme

P2Q4: Quelle est votre occupation ?

- Étudiant.e
- Étudiant.e et employé.e
- Employé.e
- Sans emploi

P2Q5: J'habite dans une ville de :

- moins de 2.000 habitants
- entre 2.000 et 50.000 habitants
- entre 50.000 et 100.000 habitants

- entre 100.000 et 500.000 habitants
- plus de 500.000 habitants

PARTIE 2 – Les préférences des consommateurs.trices français.es pour la vodka

P2Q1: Quelle est votre préférence pour la vodka comme boisson spiritueuse sur une échelle de 1 à 5 ? Veuillez classer votre préférence pour la vodka où "1" est le moins préféré et "5" est le plus préféré.

P2Q2: Pour quelles raisons buvez-vous de la vodka ?
Veuillez choisir une ou plusieurs réponses.

- Pour améliorer les interactions sociales (passer du bon temps avec des amis, s'amuser davantage, etc.)
- Pour l'ennui
- Pour traiter les problèmes liés à la santé mentale
- Pour faire face à la pression des pairs
- Pour le goût (également comme base pour d'autres boissons alcoolisées)
- Autres (Quelles ?)

P2Q3: Où consommez-vous habituellement de la vodka ?
Veuillez choisir une ou plusieurs réponses.

- Dans un restaurant
- Dans un pub/bar/club
- A la maison
- Dans un cadre privé (fête de famille, dîner en famille, soirée entre amis, etc.)
- Autres (Où ?)

P2Q4: Au cours d'un mois typique, combien de jours buvez-vous de la vodka ?
Veuillez choisir l'une des réponses suivantes

- Moins de 3 jours
- Entre 3 et 10 jours
- Plus de 10 jours
- Pas du tout

P2Q5: Qu'est-ce qui compte le plus pour vous lorsque vous choisissez une marque de vodka ? Veuillez les classer par ordre de préférence, du plus important au moins important.

- Prix
- Qualité
- Goût
- Patrimoine/Histoire de la marque de vodka
- Emballage
- Durabilité
- Pays d'origine

P2Q6: La vodka française est-elle votre vodka préférée ?

- Oui
- Non

P2Q7: Combien êtes-vous prêt à payer pour une bouteille de vodka française de 70 cl ? Veuillez choisir l'une des réponses suivantes.

- Moins de 20 €
- Entre 20 et 25 €
- Entre 25 et 30 €
- Plus de 30 €

P2Q8: Combien êtes-vous prêt à payer pour une bouteille de vodka polonaise de 70 cl ? Veuillez choisir l'une des réponses suivantes.

- Moins de 20 €
- Entre 20 et 25 €
- Entre 25 et 30 €
- Plus de 30 €

P2Q9: Seriez-vous prêt à payer plus si la vodka était dite "artisanale" et provenait d'une petite distillerie et d'une production locale ? Veuillez choisir l'une des réponses suivantes.

- Oui
- Non
- Cela dépend

PART 3 – Perception de la vodka polonaise par les consommateurs.trices français.es

P3Q1: Quels sont les trois premiers mots qui vous viennent à l'esprit lorsque tu penses à la vodka polonaise ?

P3Q2: Comment évaluez-vous les facteurs mentionnés ci-dessous par rapport à la vodka polonaise sur une échelle de 1 à 5 ? Veuillez classer votre vos opinions sur l'échelle où "1" est le moins associé et "5" est le plus associé.

- Haute réputation
- Produit haut de gamme
- Bonne qualité
- Possibilité d'offrir un cadeau
- Connue dans d'autres pays

P3Q3: Choisissez les marques de vodka d'origine polonaise que vous connaissez. Veuillez choisir l'une ou plusieurs des réponses suivantes.

- Wyborowa
- Ostoya
- Sobieski
- Żubrówka
- Bocian
- Chopin
- Pan Tadeusz
- Belvedere
- Żołądkowa De Luxe
- Soplica
- Je ne connais aucune
- Autres (Quelles ?)

P3Q4: La vodka polonaise est-elle disponible lorsque vous souhaitez l'acheter. Veuillez choisir l'une des réponses suivantes.

- Facilement disponible
- Plutôt facile à trouver
- Modérée : ni facilement, ni difficile à trouver

- Plutôt difficile à trouver
- Difficile à obtenir

P3Q5: Comment classeriez-vous le prix de la vodka polonaise en France ?
Veuillez choisir l'une des réponses suivantes.

- Bon marché
- Relativement bon marché
- Modérée : ni bon marché, ni chère
- Relativement cher
- Cher

Appendix 2. Market survey questionnaire template in English

PART 1 – Introduction

P1Q1: Please indicate your age

- 18-24
- 25-39
- 40-59
- 60 and more

P1Q2: Gender:

- Male
- Female
- Non-Binary
- Prefer not to say

P1Q3: What is your most recent complete level of education?

- High School Diploma
- Bachelor's Degree
- Master's Degree
- PhD
- No diploma
- Other

P2Q4: What is your occupation?

- Student
- Student & Employed
- Employed
- Unemployed

P2Q5: I live in a town of:

- less than 2.000 inhabitants
- between 2.000 and 50.000 inhabitants
- between 50.000 and 100.000 inhabitants
- between 100.000 and 500.000 inhabitants
- more than 500.000 inhabitants

PART 2 – Vodka preferences of French consumer

P2Q1: How much do you prefer vodka on the 1-5 scale ?

P2Q2: What is the reason you drink vodka?

- to improve social interaction (having a good time with friends, having more fun, etc.)
- to improve mental health-related issues
- to cope with peer pressure
- boredom
- taste (also as a base for other alcoholic drinks)
- other (what?)

P2Q3: Where do you consume vodka typically?

- in a restaurant
- in a pub/bar/club
- at home
- at a private settings like house party
- other (where?)

P2Q4: In a typical **month** how many days do you drink vodka?

- less than 3 days

- between 3 and 10 days
- more than 10 days
- not at all

P2Q5: What matters most to you when choosing a vodka brand? Please rank by order of preference from the most important factor to the least important one.

- Price
- Quality
- Taste
- Heritage/History of the vodka brand
- Packaging
- Sustainability
- Country of origin

P2Q6: Is French vodka most preferable vodka? Yes/No

P2Q7: How much are you willing to pay for a French 70cl bottle of vodka?

- less than 15 €
- 15-20 €
- 20-30 €
- more than 30 €

P2Q8: How much are you willing to pay for a Polish 70cl bottle of vodka?

- less than 15 €
- 15-20 €
- 20-30 €
- more than 30 €

P2Q9: Would you be willing to pay more if vodka is so called “craft” and comes from small distillery and local production?

- Yes
- No
- It depends

PART 3 – Perception of Polish vodka by French consumer

P3Q1: What is the first three words that comes to your mind when thinking about Polish vodka?

P3Q2: On a scale 1-5 how do you describe below mentioned factors towards Polish vodka?

- Reputation
- Premium
- High quality
- Option as a receiving gift
- Well-known in other countries

P3Q3: Choose the Polish vodka brands (originally from Poland) you know:

- Wyborowa
- Ostoya
- Sobieski
- Żubrówka
- Bocian
- Chopin
- Pan Tadeusz
- Belvedere
- Żołądkowa De Luxe
- Soplica
- Other (Which one?)

P3Q4: Do you think Polish Vodka is readily available when you want to buy it?

- Easily available
- Rather easily available
- Moderate: Not easily not difficult available
- Rather difficult available
- Difficult available

P3Q5: How would you rate the price of Polish vodka in France?

- Cheap

- Relatively Cheap
- Moderate: not cheap, not expensive
- Relatively Expensive
- Expensive

List of Figures

List of Tables

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