A division of the IWSR Group

Ireland

Wine Landscapes 2023

Contents

Wine Intelligence Viewpoint

The Irish wine market is showing trends seen in other mature markets, with declining volumes of still wine and a shrinking wine drinking population

As well as shrinking in numbers, Irish regular wine drinkers tend to be more mature with most of them into their 40s or older.

There are significantly fewer consumers of red wine than three years ago and all red grape varieties are experiencing dramatic falls in recalled consumption. Increased competition from other beverages has evidently weakened the category, especially the growing popularity of cocktails.

The on-trade is yet to recover after the pandemic and is being heavily affected by the ongoing cost of living crisis. The number of drinkers buying wine in a restaurant has fallen in the past three years. However, the consequences of the economic situation are starting to soften with consumer confidence showing a slight improvement on last year.

The retail landscape in Ireland is changing, with a smaller proportion of wine drinkers using the leading international discount stores Aldi and Lidl. Dunnes shines as the biggest winner of the changing wine landscape and is now the second most-used retailer in the country for wine.

There is a broadly pessimistic outlook for wine brands, with many achieving lower scores across our brand health measures, especially in connection with consumers. However, there are a few notable increases in awareness for some market leaders versus 2020.

Opportunities

Sparkling wine growth.
Consumer confidence on the mend.
Brand awareness is up post-2020.

Threats

Declining volumes of still wine.
A shrinking wine-drinking population.
Red wine losing consumers.
On-trade still suffering.

Management Summary

Ireland Wine Landscapes

2023

Management summary

Key takeaways

1. Volume of wine has been declining since 2020

2. Wine drinking population is on the decline

3. There are fewer red wine drinkers

4. Discount stores lose ground but Dunnes stands out

5. The on-trade is yet to recover

6. Mainstream wine brands are failing to connect

1. Volume of wine has been declining since 2020

After reaching a peak in 2020, volumes of still wine have declined over the past two years with the category forecast to continue to fall. This is a likely indicator that the category was unable to build on the momentum it made during the pandemic and is falling as drinkers return to pre-pandemic habits. Sparkling wine is a success, with the category growing between 2017 and 2022. This trend is forecast to continue

Total beverage alcohol market volumes by category

000s 9-litre cases

	2017	2020	2021	2022	CAGR 17-22	CAGR F 22-27
Total Wine	8,337.20	9,105.50	8,778.20	8,617.10	0.7%	-0.8%
Still Wine	7,800.25	8,503.00	8,125.10	7,967.00	0.4%	-0.9%
Sparkling Wine	431.45	480.00	550.00	529.00	4.2%	0.7%
Other Wines	38.50	53.75	36.30	49.00	4.9%	-3.9%
Fortified Wine	45.75	45.25	44.40	47.30	0.7%	-2.2%
Light Aperitifs	21.25	23.50	22.50	24.80	3.1%	1.2%

Market context:

While total alcohol volumes grew in 2022, this was largely thanks to beer and cider in the on-trade. Because of its greater focus on at-home consumption, still wine dropped back from its 2020 lockdown-driven peak

Executive Summary Report 2023 Ireland

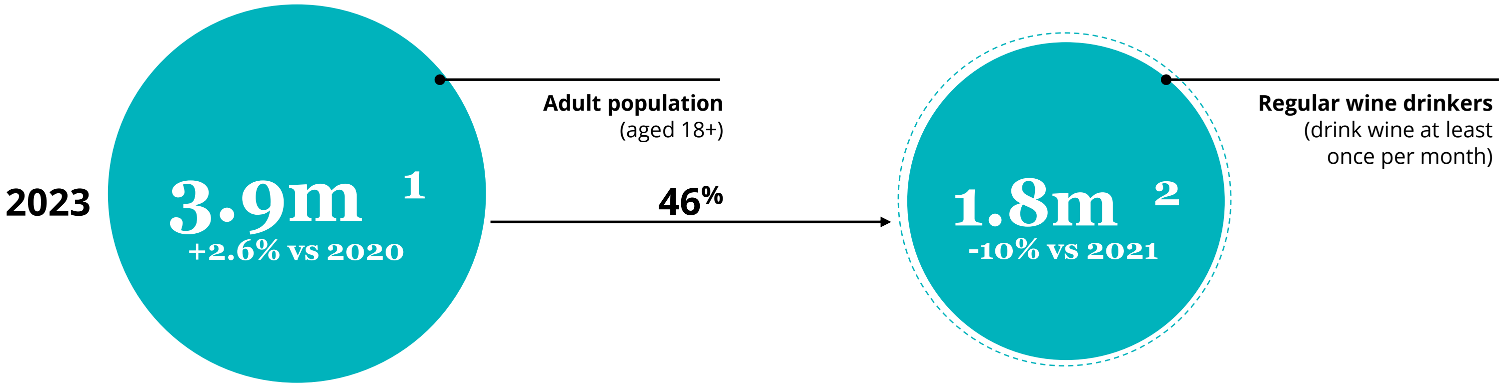
Other Wines includes non-grape based wines
Source: IWSR

2. Wine drinking population is on the decline

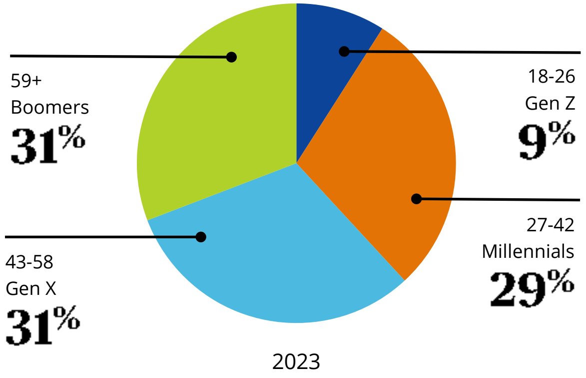
Along with the trend in other developed markets, the wine drinking population in Ireland has shrunk, and is now down to under 2 million drinkers, a fall of 10% in its addressable market. The consumer profile is relatively old, with over 60% of Irish monthly wine drinkers in their 40s or are older

Addressable market

Populations expressed in millions



Generation cohorts



Market context:

Recruitment remains the major challenge for Irish wine importers. Younger LDA consumers are choosing categories other than still wine. For the Irish wine market to grow in volume, it is necessary to encourage existing drinkers to consume more of it

Executive Summary Report 2023 Ireland

1Wine Intelligence online calibration study Feb 2021 & March 2023 (n>=1,000) Irish adults. Wine=still light wine (red, white, rosé)

2 Wine Intelligence, Vinitrac® Ireland Oct '20, Apr' 23 (n>1,000) Irish regular wine drinkers

3. There are fewer red wine drinkers

Three-quarters of wine drinkers consume red but this proportion has been in sharp decline since 2020. All red varieties have suffered significant decreases in recalled consumption, with the most drastic declines in Shiraz, Cabernet Sauvignon and Merlot. At the same time, consumption of cocktails has grown, with 35% of respondents reporting drinking them, up from 30% last year. Cocktails are strongly associated with the on-trade

Alcoholic beverage repertoire: Tracking

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

Ranking '23		2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
1	White wine	**81%**	**81%**	**81%**	→	→
2	Red wine	**79%**	**76%**	**75%**	↓	→
3	Beer	**72%**	**68%**	**71%**	→	→
4	Prosecco	**53%**	**55%**	**51%**	→	→
5	Whisky / Whiskey	**50%**	**45%**	**45%**	↓	→
6	Gin	**47%**	**42%**	**43%**	→	→
7	Vodka	**40%**	**40%**	**39%**	→	→
8	Cider	**46%**	**40%**	**38%**	↓	→
9	Rosé wine	**39%**	**33%**	**37%**	→	→
10	Cocktails	**31%**	**30%**	**35%**	→	↑

Red varietal consumption: Tracking

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

Ranking '23		2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
1	Merlot	**60%**	**56%**	**54%**	↓	→
2	Cabernet Sauvignon	**52%**	**49%**	**46%**	↓	→
3	Malbec	**41%**	**46%**	**39%**	→	↓
4	Pinot Noir	**39%**	**36%**	**35%**	↓	→
5	Shiraz / Syrah	**40%**	**36%**	**31%**	↓	↓

→ = Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

4. Discount stores lose ground but Dunnes stands out

Significantly fewer respondents report using Lidl and Aldi than three years ago, with less than a third of wine drinkers visiting the discounter. Dunnes, which has recently upgraded from value grocery to an upmarket offering, has notably improved its score

Wine-buying retailer usage: Tracking

% who mainly use the following retailers to buy wine
Base = All Irish regular wine drinkers (n≥1,000)

Ranking '23		2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
1	Tesco	52%	52%	52%	→	→
2	Dunnes	30%	34%	35%	↑	→
3=	SuperValu	37%	32%	32%	↓	→
3=	Lidl	39%	32%	32%	↓	→
5	Aldi	31%	31%	23%	↓	↓
6=	Centra	13%	12%	11%	→	→
6=	O'Briens	17%	12%	11%	↓	→
8=	Spar / Eurospar	8%	6%	5%	↓	→
8=	Carry Out	6%	4%	5%	→	→
10	Marks & Spencer	7%	4%	3%	↓	→
11	Londis	3%	3%	2%	→	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

5. The on-trade is yet to recover

The proportion of wine drinkers who buy wine in a bar, pub or restaurant has fallen from 93% to 90% since the pandemic. All on-trade behaviours are suffering from the consequences of the economic crisis. Going out is most affected: about the same proportion of drinkers go out less this year as last year. The patterns are uneven between age groups. Gen X and Boomers are the most likely to reduce or limit their on-trade participation.

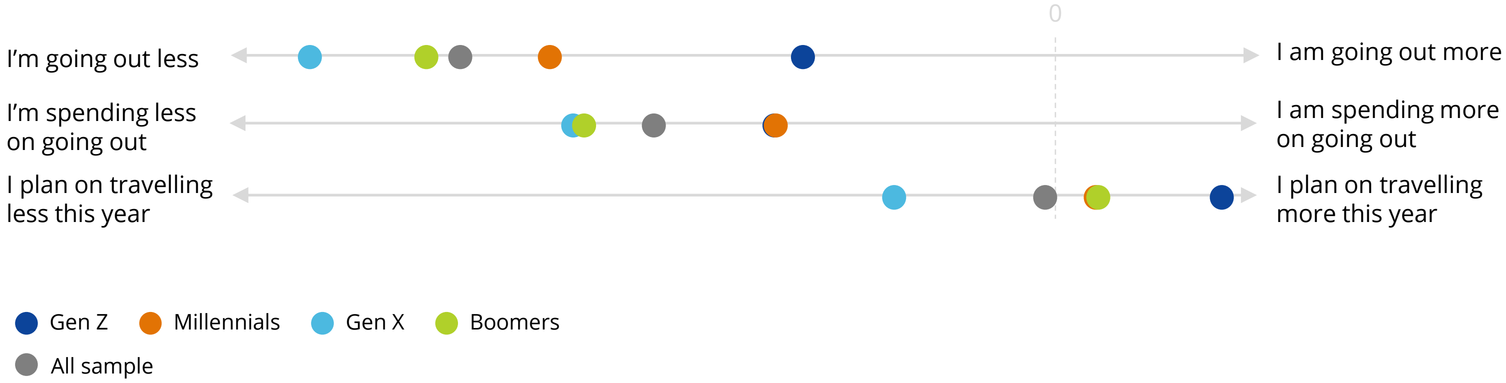
Wine purchase in on-trade: Tracking

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

On-trade location		2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
Bar or pub	Yes	52%	49%	50%	→	→
	No	48%	51%	50%	→	→
Restaurant	Yes	92%	87%	88%	↓	→
	No	8%	13%	12%	↑	→
On-trade drinkers	Yes	93%	88%	90%	↓	→
	No	7%	12%	10%	↑	→

Consumer sentiment: Tracking

Net score of % who agree with the negative statement subtracted from the % who agree with the positive statement
Base = All Irish regular wine drinkers (n=1,005)



↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

6. Mainstream wine brands are failing to connect

There is a broadly negative picture of brand performance, with many showing declines for all measures, with an improvement in awareness for a few brands on the long-term. Significant falls were observed in both recommendation and affinity for the leading wine brands

Affinity: Tracking

Base = Those who have heard of each brand

Ranking '23		2020	2022	2023	Tracking vs. '20	Tracking vs. '22
1	Casillero del Diablo	50%	51%	51%	→	→
2	Dadá	50%	53%	49%	→	→
3	Santa Rita 120	n/a	51%	45%	n/a	↓
4	Oyster Bay	49%	45%	43%	↓	→
5	Yellow Tail	46%	42%	42%	→	→
6=	Faustino	43%	41%	41%	→	→
6=	McGuigan	49%	42%	41%	↓	→
8	Wolf Blass	52%	42%	39%	↓	→
9=	i heart Wines	47%	43%	36%	↓	→
9=	Apothic	47%	42%	36%	↓	→

Recommendation: Tracking

Base = Those who have heard of each brand

Ranking '23		2020	2022	2023	Tracking vs. '20	Tracking vs. '22
1=	Dadá	46%	54%	45%	→	↓
1=	Casillero del Diablo	47%	46%	45%	→	→
3	Santa Rita 120	n/a	46%	41%	n/a	↓
4	Oyster Bay	44%	41%	39%	→	→
5=	Wolf Blass	45%	40%	37%	↓	→
5=	McGuigan	43%	39%	37%	→	→
7	Apothic	35%	38%	36%	→	→
8=	Faustino	42%	38%	35%	↓	→
8=	Yellow Tail	39%	37%	35%	→	→
10	Barefoot	32%	33%	31%	→	→

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

Management summary – tracking metrics

Fewer respondents are drinking from as broad of a range of wine-producing countries as they used to

Top alcoholic beverages

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

	2020	2023	Tracking
White wine	**81%**	**81%**	➡
Red wine	**79%**	**75%**	⬇
Beer	**72%**	**71%**	➡
Prosecco	**53%**	**51%**	➡
Whisky / Whiskey	**50%**	**45%**	⬇

Top country of origin

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

	2020	2023	Tracking
France	**57%**	**51%**	⬇
Italy	**49%**	**45%**	➡
Spain	**49%**	**45%**	⬇
Chile	**47%**	**40%**	⬇
Australia	**40%**	**34%**	⬇

Top region of origin

% who have bought wine from the following wine-producing regions in the past three months

	2020	2023	Tracking
Prosecco	**31%**	**29%**	➡
Bordeaux	**35%**	**28%**	⬇
Rioja	**31%**	**28%**	➡
Chianti	**17%**	**16%**	➡
Côtes du Rhône	**21%**	**15%**	⬇

Top wine brands

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

	2020	2023	Tracking
Casillero del Diablo	**36%**	**36%**	➡
Santa Rita 120	**n/a**	**29%**	n/a
Dadá	**20%**	**28%**	⬆
Yellow Tail	**24%**	**21%**	➡
Oyster Bay	**18%**	**18%**	➡

n/a = tracking unavailable for this wave

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

Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '23, (n≥1,000) Irish regular wine drinkers

Management summary – tracking metrics

Respondents are drinking a narrower range of grape varieties than in previous years

Top red varietals

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

	2020	2023	Tracking
Merlot	**60%**	**54%**	↓
Cabernet Sauvignon	**52%**	**46%**	↓
Malbec	**41%**	**39%**	→
Pinot Noir	**39%**	**35%**	↓
Shiraz / Syrah	**40%**	**31%**	↓

Top wine-shopping channels

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

	2020	2023	Tracking
In the supermarket	**89%**	**86%**	→
Convenience stores (Spar, Centra)	**38%**	**35%**	→
In a high street off-licence	**32%**	**29%**	→
In my local independent wine merchant	**24%**	**19%**	↓
Petrol stations	**14%**	**14%**	→

Top white varietals

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

	2020	2023	Tracking
Sauvignon Blanc	**65%**	**64%**	→
Pinot Grigio / Pinot Gris	**53%**	**49%**	→
Chardonnay	**48%**	**44%**	→
Riesling	**24%**	**18%**	↓
Chenin Blanc	**23%**	**17%**	↓

Top wine-buying retailers

% who mainly use the following retailers to buy wine

	2020	2023	Tracking
Tesco	**52%**	**52%**	→
Dunnes	**30%**	**35%**	↑
SuperValu	**37%**	**32%**	↓
Lidl	**39%**	**32%**	↓
Aldi	**31%**	**23%**	↓

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

Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '23, (n≥1,000) Irish regular wine drinkers

Market Data

Ireland Wine Landscapes

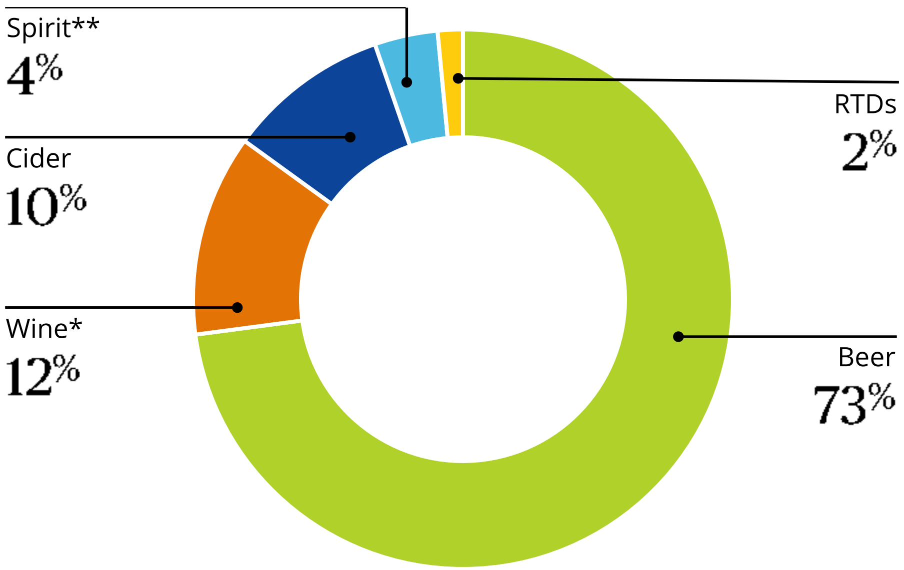
2023

Total beverage alcohol market share by category

The volume of wine sold increased between 2017 and 2022 but is forecast to decline in the future

Total beverage alcohol market share by category

% of purchases that fall within the categories below



Total beverage alcohol market volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total beverage alcohol	62,830.20	71,297.60	0.5%	-0.6%
Beer	43,977.80	51,977.80	0.3%	-0.6%
Wine*	8,778.20	8,617.10	0.7%	-0.8%
Cider	6,455.60	6,933.30	-0.5%	-1.6%
Spirit**	2,543.10	2,697.60	3.5%	1.1%
RTDs	1,075.50	1,071.80	13.4%	-1.0%

Source: IWSR

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

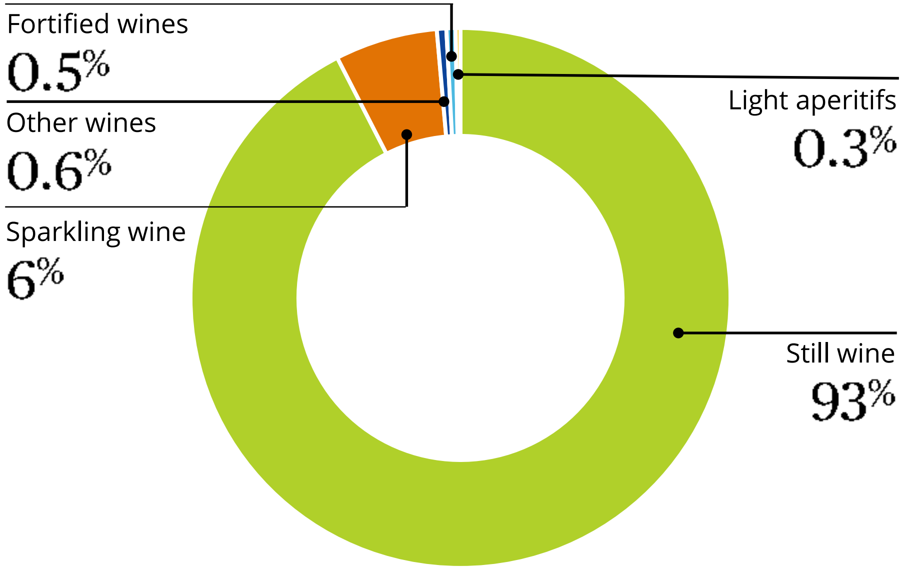
** Spirits include whisky, gin and genever, vodka, agave-based spirits, national spirits, rum, cane, brandy and flavored spirits

Total wine market volumes

Sparkling wine has been a key area of growth, with an increase of 4.2% between 2017 and 2022; although still wine remains the market leading category

Total wine share by category

% of purchases that fall within the categories below



Total wine volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total Wine	8,778.20	8,617.10	0.7%	-0.8%
Still Wine	8,125.10	7,967.00	0.4%	-0.9%
Sparkling Wine	550.00	529.00	4.2%	0.7%
Other Wines	36.30	49.00	4.9%	-3.9%
Fortified Wine	44.40	47.30	0.7%	-2.2%
Light Aperitifs	22.50	24.80	3.1%	1.2%

Other Wines includes non-grape based wines
Source: IWSR

Still wine volumes by origin

The leading countries of origin in Ireland are Chile, France and Australia, which have all seen volume declines; Spain and Italy's volumes have grown over the same period

Total still wine volumes and market share by origin

000s 9-litre cases

		2021	2022	CAGR 17-22	CAGR F 22-27	Market Share
	Total	8,125.10	7,967.00	0.4%	-0.9%	
1	Chilean	1,690.00	1,681.00	-0.7%	-1.0%	21%
2	French	1,305.50	1,229.10	-0.1%	0.0%	15%
3	Australian	1,167.00	1,150.50	-2.2%	-1.6%	14%
4	Spanish	923.10	813.90	2.5%	-0.9%	10%
5	US	684.00	709.00	-2.0%	-4.4%	9%
6	Italian	701.00	706.00	1.6%	1.6%	9%
7	New Zealand	527.00	537.00	3.1%	0.7%	7%
8	Argentinian	418.00	434.00	8.1%	2.0%	5%
9	South African	215.00	223.50	-8.4%	-5.5%	3%
10	International	203.50	190.50	27.8%	-5.2%	2%

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

Source: IWSR

Still wine retail price by origin

Most countries of origin have seen a slight increase in their price per bottle

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a variable exchange rate

		Retail price per 0.75l 2022 (US$)	CAGR 17-22	CAGR F 22-27
	Total	13.14	1.4%	0.4%
1	Chilean	12.14	1.3%	0.1%
2	French	14.50	1.9%	0.2%
3	Australian	11.19	1.1%	0.0%
4	Spanish	13.31	2.5%	1.0%
5	US	12.58	1.7%	0.6%
6	Italian	16.00	1.6%	0.2%
7	New Zealand	16.47	-0.1%	0.0%
8	Argentinian	12.40	1.0%	0.1%
9	South African	12.87	1.4%	0.2%
10	International	11.11	-3.2%	-0.1%

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

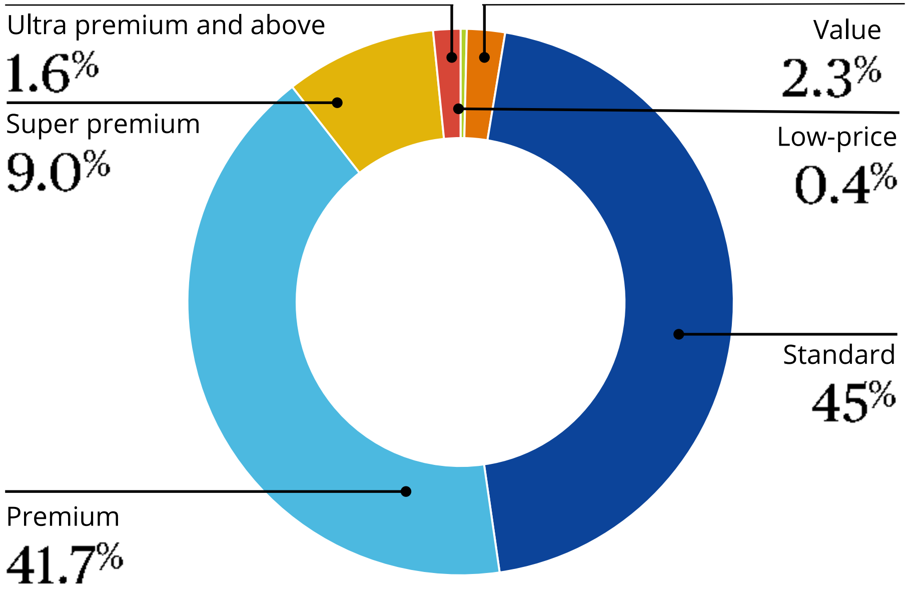
Source: IWSR

Still wine by price band

There has been growth in the volume of wine sold at super-premium or higher price points; the majority of wine is still sold at €8–€16.49

Still wine by price band

% of purchases that fall within the categories below



Still wine volumes by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Low-Price (under €5.50)	31.00	29.00	n/a	4.4%
Value (between €5.50 and €7.99)	203.70	179.50	-2.3%	-6.7%
Standard (between €8.00 and €11.49)	3,529.40	3,592.60	0.5%	-2.2%
Premium (between €11.50 and €16.49)	3,491.00	3,323.40	-0.1%	0.1%
Super Premium (between €16.50 and €20.49)	738.00	713.40	2.4%	1.2%
Ultra Premium (over €20.50)	132.10	129.40	2.1%	0.3%
Prestige (over €40.00)	0.70	0.70	24.9%	2.7%

Source: IWSR

Still wine consumption per capita

Per capita consumption of wine in Ireland declined between 2017 and 2022

Per capita consumption of still wine

Litres per annum (adult LDA+ population)

		2021	2022	CAGR 17-22	CAGR 21-22
1	St. Martin and St. Maarten	46.70	49.00	12.3%	5.0%
2	Portugal	43.00	45.70	-0.9%	6.3%
3	Montenegro	41.80	42.60	-0.9%	2.0%
4	Italy	42.20	39.90	-2.8%	-5.2%
5	Slovenia	37.60	37.80	-2.8%	0.5%
6	St. Barths	33.90	37.20	9.3%	9.8%
7	Switzerland	36.10	34.90	-1.5%	-3.3%
8	France	35.70	33.90	-5.2%	-5.0%
9	Greece	28.00	33.80	0.5%	20.9%
10	Hungary	31.50	32.70	0.6%	3.6%
11	Denmark	33.40	31.00	-1.2%	-7.1%
12=	Austria	30.90	30.10	-1.3%	-2.6%
12=	Turks and Caicos	27.60	30.10	-2.9%	9.2%
14=	Romania	27.50	27.90	2.4%	1.2%
14=	US Virgin Islands	27.80	27.90	-2.6%	0.3%
16	Germany	26.50	25.30	-2.5%	-4.8%
17	Argentina	25.30	24.90	-2.7%	-1.5%
18	Malta	21.20	24.30	-6.4%	14.9%
19=	Uruguay	25.60	23.40	-1.3%	-8.6%
19=	Slovakia	22.90	23.40	-0.1%	1.9%
32	Ireland	18.60	18.00	-0.8%	-3.1%

Source: IWSR

Sparkling wine volumes by origin

The leading countries of origin for sparkling wine in Ireland all saw volume growth between 2017 and 2022; Australia lost some momentum

Total sparkling wine volumes and market share by origin

000s 9-litre cases

		2021	2022	CAGR 17-22	CAGR F 22-27	Market Share
	Total	550.00	529.00	4.2%	0.7%	
1	Italian	388.70	373.60	3.7%	0.8%	71%
2	French	92.50	94.20	7.4%	1.0%	18%
3	Spanish	36.90	34.50	2.7%	0.0%	7%
4	Australian	17.20	10.30	-11.8%	-8.7%	2%
5	International	7.10	8.50	109.4%	0.0%	2%
6	United Kingdom	3.80	4.00	14.9%	7.5%	1%
7	German	1.20	1.30	21.4%	1.9%	0%
8	New Zealand	1.00	1.00	3.3%	0.0%	0%
9	South African	0.80	0.80	-5.6%	0.0%	0%
10	Chilean	0.40	0.40	-6.9%	0.0%	0%

Source: IWSR

Sparkling wine retail price by origin

The average bottle price of sparkling wine has decreased for a number of countries, which could be a consequence of the economic situation affecting drinkers' spending habits

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a variable exchange rate

		Retail price per 0.75l 2022 (US$)	CAGR 17-22	CAGR F 22-27
	Total	21.10	0.3%	0.2%
1	Italian	17.27	-0.4%	-0.3%
2	French	40.40	0.6%	1.0%
3	Spanish	16.95	-2.3%	-1.1%
4	Australian	13.14	-1.4%	-0.4%
5	International	9.18	0.3%	0.0%
6	United Kingdom	15.81	-1.3%	0.0%
7	German	13.49	-6.8%	-0.8%
8	New Zealand	8.43	-3.8%	0.0%
9	South African	8.43	-16.6%	0.0%
10	Chilean	8.43	-1.3%	0.0%

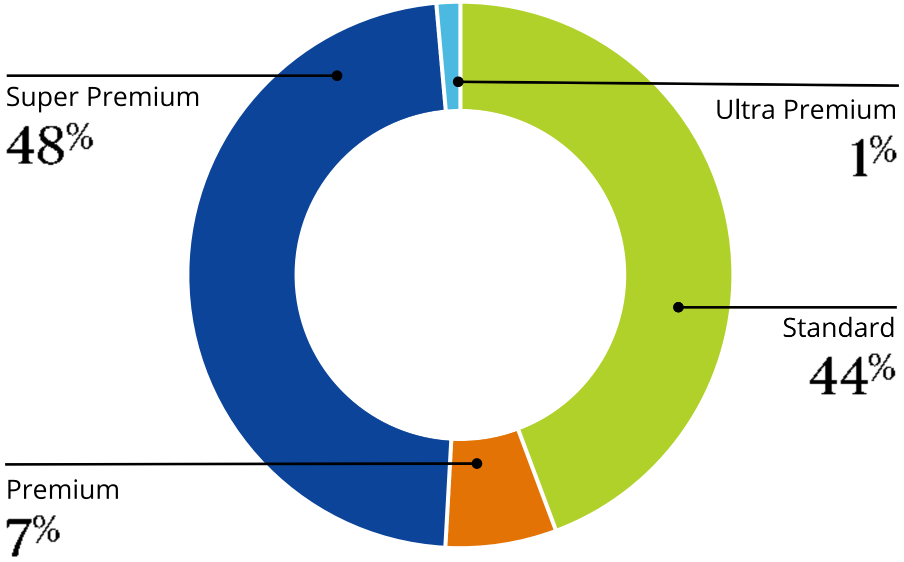
Source: IWSR

Champagne by price band

Champagne has seen the largest growth in volumes sold in the super-premium price band

Champagne by price brand

% of purchases that fall within the categories below



Champagne volumes by price band

'000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Standard (below €27.50)	**33.00**	**34.00**	**2.5%**	**1.7%**
Premium (between €27.50 and €39.99)	**5.00**	**5.05**	**0.2%**	**0.6%**
Super Premium (between €40.00 and €64.99)	**36.38**	**36.62**	**9.7%**	**1.3%**
Ultra Premium and above (€65.00 and over)	**0.87**	**1.08**	**7.6%**	**10.6%**

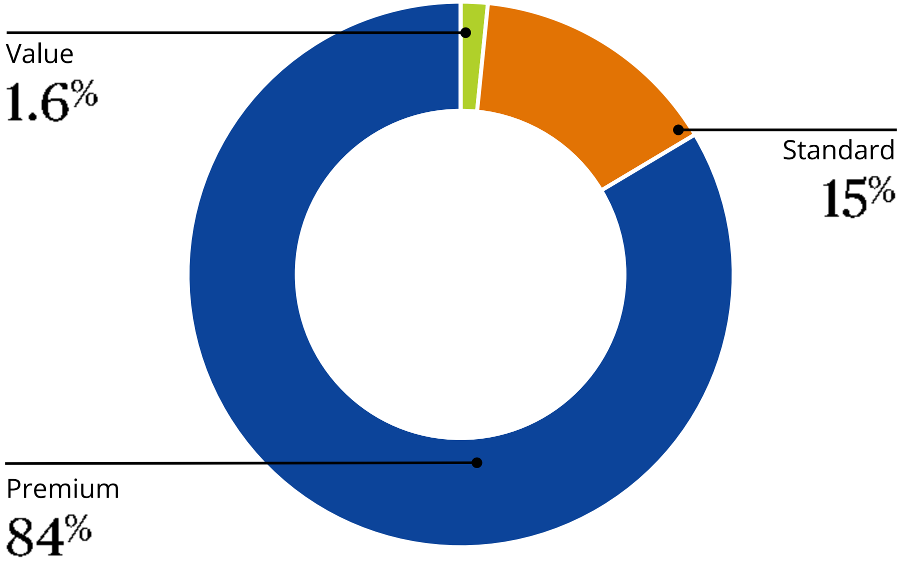
Source: IWSR

Other sparkling wine by price band

The majority of sparkling wine in Ireland is sold at €20 and above

Sparkling wine by price brand

% of purchases that fall within the categories below



Note: Other sparkling wine includes all sparkling wine types except Champagne, and includes low and no sparkling wine types

Sparkling wine volumes by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Value (under €10.00)	8.23	7.24	15.6%	-6.6%
Standard (between €10.00 and €19.99)	72.51	67.06	0.6%	-2.1%
Premium (over €20.00)	394.01	377.95	4.4%	1.1%

Source: IWSR

Sparkling wine consumption per capita

Ireland saw an increase in its per capita consumption of sparkling wine between 2017 and 2022

Per capita consumption of sparkling wine

Litres per annum (LDA+ adults)

		2021	2022	CAGR 17-22	CAGR 21-22
1	St. Barths	12.50	13.60	13.1%	8.9%
2	St. Martin and St. Maarten	6.30	8.30	21.7%	32.6%
3	Italy	7.90	7.40	-1.2%	-6.2%
4	Turks and Caicos	5.30	6.50	-2.4%	23.4%
5	Germany	5.30	5.50	-1.9%	3.7%
6	Lithuania	4.90	5.10	7.3%	3.6%
7=	Latvia	4.50	4.90	2.6%	9.4%
7=	France	4.70	4.90	-1.3%	2.7%
9	Guadeloupe	4.20	4.80	-1.8%	15.5%
10	Martinique	4.20	4.40	-4.6%	4.8%
11=	Estonia	4.10	4.30	4.0%	6.3%
11=	Belgium and Luxembourg	4.30	4.30	-1.5%	-0.2%
13	Austria	3.40	3.50	0.3%	2.9%
14=	Switzerland	3.20	3.30	0.9%	3.0%
14=	Cayman Islands	3.10	3.30	2.1%	5.8%
14=	Sweden	3.30	3.30	6.7%	0.6%
17=	United Kingdom	3.20	3.00	-0.6%	-4.8%
17=	Slovenia	2.90	3.00	3.0%	4.1%
19=	New Zealand	3.10	2.90	-1.6%	-6.1%
19=	Reunion	2.60	2.90	0.7%	14.7%
49	Ireland	1.30	1.20	2.9%	-5.0%

Source: IWSR

Market Demographics

Ireland Wine Landscapes

2023

Irish regular wine drinkers

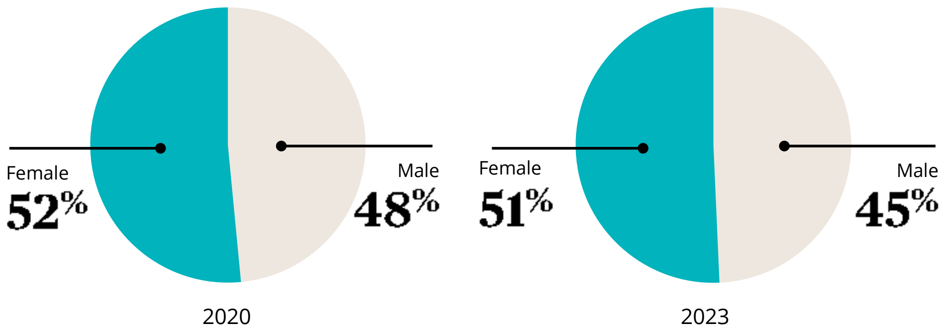
Since our previous calibration in 2021, the Irish market has lost around 10% of its regular wine drinking population and 13% of its weekly wine drinkers

1 Irish Central Statistics Office, 2020 Estimated Population classified by Sex and Age Group
2 Irish Central Statistics Office, based on preliminary 2022 census data
3 Wine Intelligence online calibration study Feb 2021 & March 2023 (n>=1,000) Irish adults. Wine=still light wine (red, white, rosé)
4 Wine Intelligence, Vinitrac® Ireland Oct '20, Apr' 23 (n>1,000) Irish regular wine drinkers

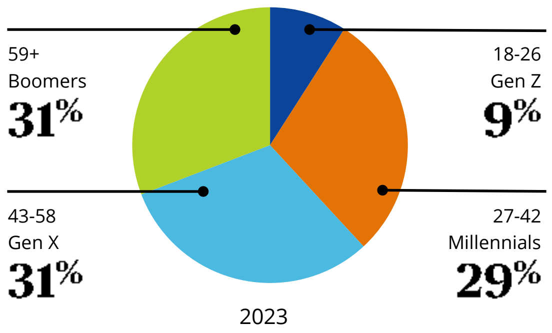
Demographics of regular wine drinkers

The demographics of Irish regular wine drinkers broadly align with those of 2020

Gender



Generation cohorts



Regions

	2020	2023	Tracking
Border	6%	7%	→
Dublin Region	41%	34%	↓
Mid-East	7%	7%	→
Midlands	8%	9%	→
Mid-West	6%	6%	→
South-East	10%	16%	↑
South-West	12%	12%	→
West	10%	10%	→

Annual household income before taxes

	2020	2023	Tracking
Under € 10,000	2%	2%	→
€10,000 - €19,999	7%	8%	→
€20,000 - €29,999	14%	12%	→
€30,000 - €39,999	17%	14%	→
€40,000 - €49,999	14%	14%	→
€50,000 - €74,999	19%	22%	→
€75,000 - €99,999	10%	11%	→
€100,000+	9%	9%	→
Prefer not to answer	8%	9%	→

Note: tracking not available for generation cohorts due to change in data collection

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

Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '23, (n≥1,000) Irish regular wine drinkers

Drinking Repertoire

Ireland Wine Landscapes

2023

Drinking repertoire

The alcohol repertoires of Irish regular wine drinkers have remained broadly unchanged, although consumption incidences for red wine, whisky and cider are significantly lower than in 2020

Market context:

White wine is outperforming red, although sweeter reds, including New World blends such as Dadá, are doing well

Drinkers rediscovered the joy of socialising in on-trade settings, with premium beers driving volumes and spirits also gaining ground, helped by the ongoing cocktail trend

Executive Summary Report 2023 Spain

Alcoholic beverage repertoire: Tracking

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

Ranking '23		2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
1	White wine	81%	81%	81%	→	→
2	Red wine	79%	76%	75%	↓	→
3	Beer	72%	68%	71%	→	→
4	Prosecco	53%	55%	51%	→	→
5	Whisky / Whiskey	50%	45%	45%	↓	→
6	Gin	47%	42%	43%	→	→
7	Vodka	40%	40%	39%	→	→
8	Cider	46%	40%	38%	↓	→
9	Rosé wine	39%	33%	37%	→	→
10	Cocktails	31%	30%	35%	→	↑
11	Craft beer	33%	31%	30%	→	→
12	Champagne (French Champagne)	29%	27%	29%	→	→
13	Rum	28%	25%	25%	→	→
14	Liqueurs	24%	20%	23%	→	→
15	Brandy / Cognac	25%	19%	20%	↓	→

=Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

Varietal consumption

Irish wine drinkers are buying a narrower range of varietals in both red and white wine

White varietal consumption: Tracking

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

Ranking '23		2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
1	Sauvignon Blanc	65%	67%	64%	→	→
2	Pinot Grigio / Pinot Gris	53%	56%	49%	→	↓
3	Chardonnay	48%	50%	44%	→	↓
4	Riesling	24%	20%	18%	↓	→
5	Chenin Blanc	23%	20%	17%	↓	→
6=	Moscato	13%	10%	11%	→	→
6=	Sémillon	14%	12%	11%	↓	→
8	Albariño	13%	8%	10%	→	→
9	Verdejo	11%	8%	7%	↓	→
10=	Viognier	10%	6%	6%	↓	→
10=	Gewürztraminer	10%	6%	6%	↓	→
10=	Grüner Veltliner	6%	4%	6%	→	↑
13	Colombard	8%	6%	5%	↓	→
14	Torrontés	7%	6%	4%	↓	→

Red varietal consumption: Tracking

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

Ranking '23		2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
1	Merlot	60%	56%	54%	↓	→
2	Cabernet Sauvignon	52%	49%	46%	↓	→
3	Malbec	41%	46%	39%	→	↓
4	Pinot Noir	39%	36%	35%	↓	→
5	Shiraz / Syrah	40%	36%	31%	↓	↓
6	Tempranillo	25%	20%	19%	↓	→
7	Pinotage	16%	14%	12%	↓	→
8	Grenache	14%	11%	11%	↓	→
9	Zinfandel	13%	10%	9%	↓	→
10	Sangiovese	11%	8%	8%	↓	→
11	Carménère	10%	6%	7%	↓	→
12	Gamay	7%	4%	4%	↓	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

HOT TOPIC

Ideal wine attributes

Ideal red and white wine attributes have remained broadly unchanged in the past 12 months; significantly fewer people say their ideal red wine would have a fruity flavour or be easy to drink

Ideal white wine attributes: Top 15

% who select each description for their ideal white wine
Base = All Irish regular wine drinkers (n≥1,005)

Ranking '23		2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '22
1	Easy to drink	**46%**	**43%**	→
2	Fresh	**39%**	**40%**	→
3	Fruity	**43%**	**39%**	→
4	Crisp	**37%**	**34%**	→
5	Smooth	**33%**	**32%**	→
6	Light	**32%**	**31%**	→
7	Dry	**23%**	**25%**	→
8	Sweet	**21%**	**23%**	→
9	Delicate	**19%**	**20%**	→
10	Juicy	**19%**	**18%**	→
11=	Elegant	**17%**	**17%**	→
11=	Soft	**16%**	**17%**	→
11=	Zesty	**17%**	**17%**	→
14	Full-bodied	**16%**	**14%**	→
15	Simple	**14%**	**12%**	→

Ideal red wine attributes: Top 15

% who select each description for their ideal red wine
Base = All Irish regular wine drinkers (n≥1,005)

Ranking '23		2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '22
1	Full-bodied	**45%**	**43%**	→
2	Rich	**36%**	**40%**	→
3	Smooth	**36%**	**34%**	→
4	Fruity	**38%**	**33%**	↓
5	Easy to drink	**37%**	**32%**	↓
6=	Earthy	**19%**	**18%**	→
6=	Elegant	**19%**	**18%**	→
8=	Juicy	**17%**	**16%**	→
8=	Oaky	**15%**	**16%**	→
10=	Bold	**17%**	**15%**	→
10=	Sweet	**14%**	**15%**	→
10=	Soft	**13%**	**15%**	→
13=	Spicy	**16%**	**14%**	→
13=	Complex	**13%**	**14%**	→
15=	Savoury	**12%**	**12%**	→

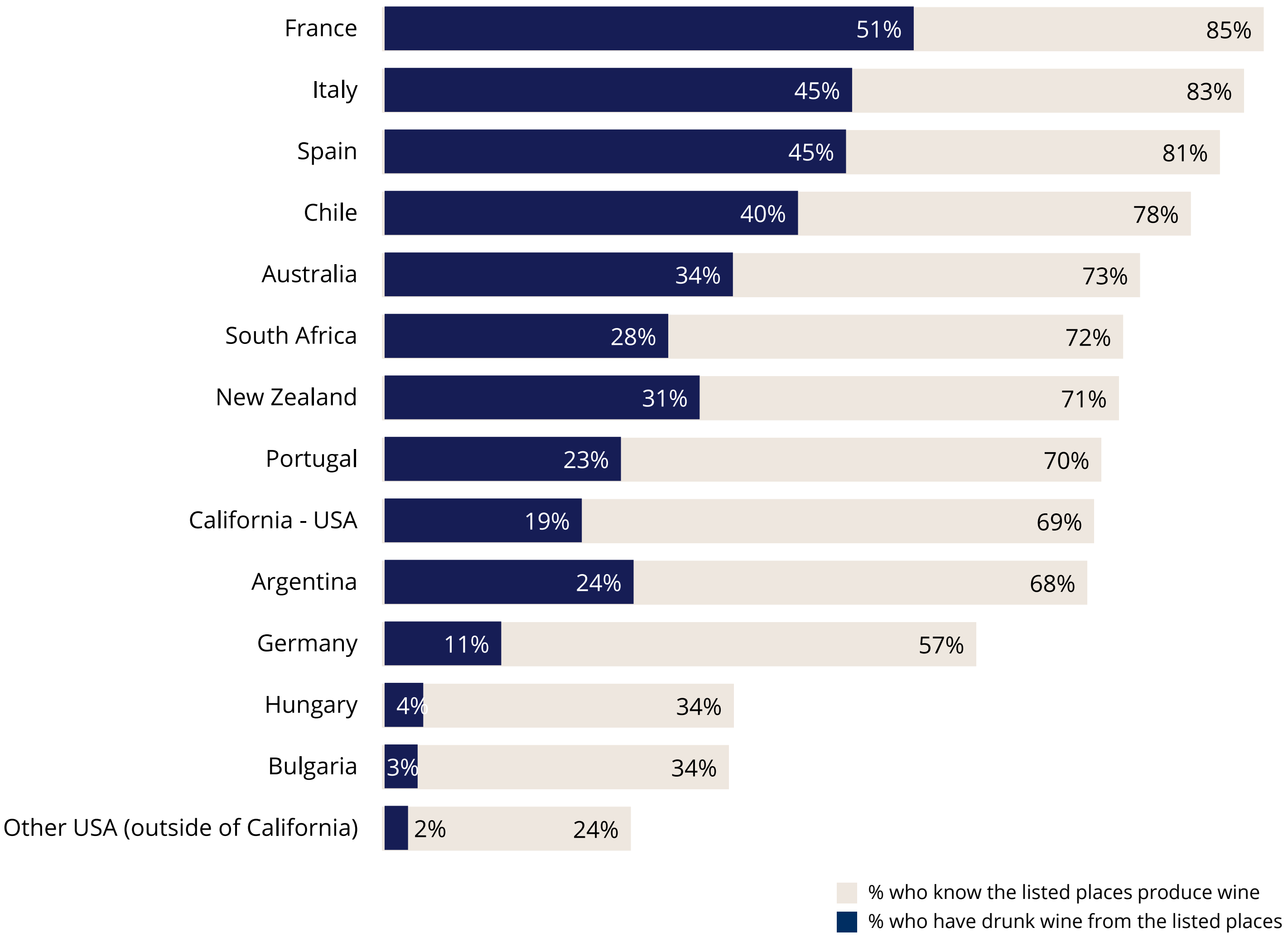
Source: Wine Intelligence, Vinitrac®, Ireland, Apr '22, Apr '23, (n≥1,005) Irish regular wine drinkers

Country of origin awareness and consumption

The leading countries of origin are all from the Old World, with France the leader on both awareness and consumption

Country of origin: Top 15 awareness and consumption levels

% of those who know of or have drunk wine from the following places in the past six months
Base = All Irish regular wine drinkers (n=1,005)



Source: Wine Intelligence, Vinitrac®, Ireland, Apr '22, (n=1,005) Irish regular wine drinkers

Country of origin awareness

Awareness for all countries of origin has remained unchanged since 2020

Country of origin awareness: Tracking

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

Ranking '23		2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
1	France	84%	86%	85%	→	→
2	Italy	82%	86%	83%	→	→
3	Spain	81%	82%	81%	→	→
4	Chile	77%	80%	78%	→	→
5	Australia	75%	75%	73%	→	→
6	South Africa	73%	74%	72%	→	→
7	New Zealand	68%	72%	71%	→	→
8	Portugal	66%	68%	70%	→	→
9	California - USA	72%	72%	69%	→	→
10	Argentina	64%	69%	68%	↑	→
11	Germany	57%	58%	57%	→	→
12=	Hungary	30%	34%	34%	→	→
12=	Bulgaria	31%	35%	34%	→	→
14	Other USA (outside of California)	24%	27%	24%	→	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

Country of origin consumption

Four of the top five leading countries for consumption have significantly lower rates than in 2020

Country of origin consumption: Tracking

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

Ranking '23		2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
1	France	57%	53%	51%	↓	→
2=	Italy	49%	45%	45%	→	→
2=	Spain	49%	47%	45%	↓	→
4	Chile	47%	46%	40%	↓	↓
5	Australia	40%	36%	34%	↓	→
6	New Zealand	32%	30%	31%	→	→
7	South Africa	35%	29%	28%	↓	→
8	Argentina	23%	24%	24%	→	→
9	Portugal	23%	19%	23%	→	→
10	California - USA	23%	21%	19%	→	→
11	Germany	14%	11%	11%	↓	→
12	Hungary	4%	3%	4%	→	→
13	Bulgaria	2%	1%	3%	→	↑
14=	Other USA (outside of California)	2%	2%	2%	→	→

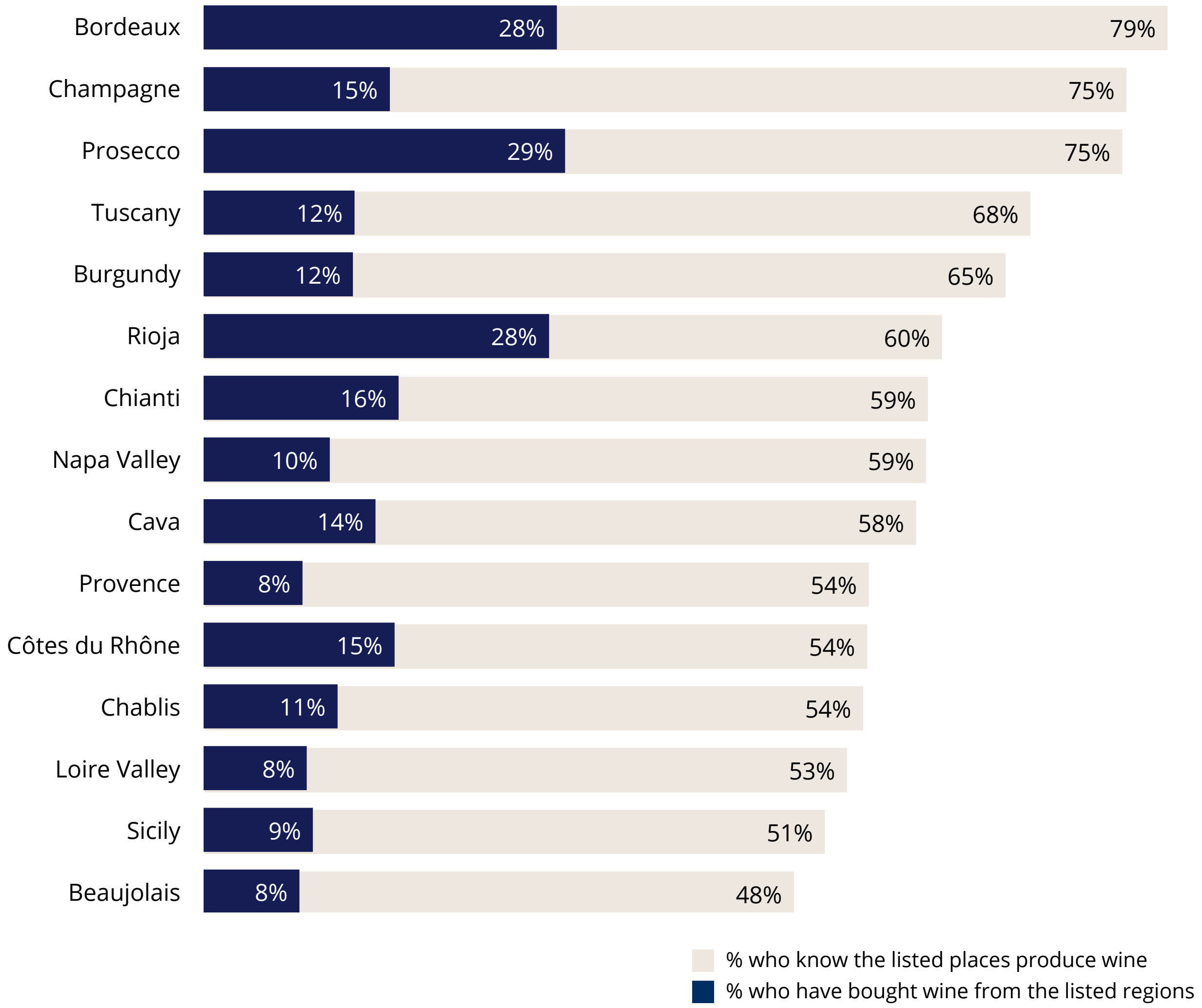
= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

Region of origin awareness and purchase

Bordeaux has the highest awareness among Irish regular wine drinkers, although Prosecco has the highest consumption score

Region of origin: Top 15 awareness and purchase levels

% of those who know of or have bought wine from the following regions in the past three months
Base = All Irish regular wine drinkers (n=1,005)



Source: Wine Intelligence, Vinitrac®, Ireland, Apr '22, (n=1,005) Irish regular wine drinkers

Region of origin awareness

Awareness scores are similar to 2020 for most regions; Burgundy has a significantly lower score

Region of origin awareness: Top 15, tracking

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

Ranking '23		2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
1	Bordeaux	82%	80%	79%	→	→
2=	Champagne	78%	77%	75%	→	→
2=	Prosecco	73%	76%	75%	→	→
4	Tuscany	68%	71%	68%	→	→
5	Burgundy	70%	69%	65%	↓	→
6	Rioja	63%	62%	60%	→	→
7=	Chianti	60%	59%	59%	→	→
7=	Napa Valley	62%	64%	59%	→	↓
9	Cava	58%	63%	58%	→	↓
10=	Provence	56%	56%	54%	→	→
10=	Côtes du Rhône	58%	55%	54%	→	→
10=	Chablis	56%	55%	54%	→	→
13	Loire Valley	56%	56%	53%	→	→
14	Sicily	52%	53%	51%	→	→
15=	Beaujolais	52%	50%	48%	→	→

= Represents equal ranking

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

Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

Region of origin purchase

Leading regions Prosecco and Bordeaux have seen their consumption incidences decrease significantly over the past few years. Other French or Italian regions also have significantly lower scores

Region of origin consumption: Top 15, tracking

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

Ranking '23		2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
1	Prosecco	31%	33%	29%	→	↓
2=	Bordeaux	35%	27%	28%	↓	→
2=	Rioja	31%	29%	28%	→	→
4	Chianti	17%	17%	16%	→	→
5=	Côtes du Rhône	21%	16%	15%	↓	→
5=	Champagne	15%	14%	15%	→	→
7=	Cava	13%	14%	14%	→	→
7=	Marlborough	13%	13%	14%	→	→
9=	Tuscany	16%	15%	12%	↓	→
9=	Burgundy	15%	12%	12%	↓	→
11=	Châteauneuf-du-Pape	11%	14%	11%	→	→
11=	Chablis	13%	11%	11%	→	→
13=	Saint-Émilion	11%	10%	10%	→	→
13=	Napa Valley	13%	11%	10%	→	→
13=	Hunter Valley	9%	9%	10%	→	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

Wine-Buying Behaviours

Ireland Wine Landscapes

2023

Wine-buying channel usage

Shopping for wine on booze cruises is showing signs of recovery and is significantly higher than in the pandemic years. Significantly fewer people are buying wine from specialist retailers

Wine-buying channel usage: Tracking

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

Ranking '23		2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
1	In the supermarket	**89%**	**89%**	**86%**	→	→
2	Convenience stores (Spar, Centra)	**38%**	**34%**	**35%**	→	→
3	In a high street off-licence	**32%**	**31%**	**29%**	→	→
4	In my local independent wine merchant	**24%**	**17%**	**19%**	↓	→
5=	Petrol stations	**14%**	**13%**	**14%**	→	→
5=	From a supermarket website	**n/a**	**14%**	**14%**	n/a	→
7	Cross border shopping	**9%**	**9%**	**10%**	→	→
8	Tax free shopping / booze cruises	**5%**	**5%**	**8%**	↑	↑
9=	From a winery during a visit	**n/a**	**4%**	**5%**	n/a	→
9=	From a delivery app	**n/a**	**4%**	**5%**	n/a	→
11	From the wine producer's cellar	**7%**	**4%**	**4%**	↓	→

18% are online wine buyers vs **16%** in 2022*

*Tracking for online wine buyers not available for 2020
= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

Wine-buying retailer usage

Regular wine drinkers are turning away from supermarkets and discount stores when buying wine. More than a third of Irish wine drinkers buy it in Dunnes, a leading retail chain

Market context:

The end of supermarket multibuys negatively affected demand. Prices are now rising significantly for the first time in more than a decade, but this has been offset by heavy discounting of branded wine by the multiples as they seek to drive footfall from beer and spirits

Executive Summary Report 2023 Spain

Wine-buying retailer usage: Tracking

% who mainly use the following retailers to buy wine
Base = All Irish regular wine drinkers (n≥1,000)

Ranking '23		2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
1	Tesco	52%	52%	52%	→	→
2	Dunnes	30%	34%	35%	↑	→
3=	SuperValu	37%	32%	32%	↓	→
3=	Lidl	39%	32%	32%	↓	→
5	Aldi	31%	31%	23%	↓	↓
6=	Centra	13%	12%	11%	→	→
6=	O'Briens	17%	12%	11%	↓	→
8=	Spar / Eurospar	8%	6%	5%	↓	→
8=	Carry Out	6%	4%	5%	→	→
10	Marks & Spencer	7%	4%	3%	↓	→
11	Londis	3%	3%	2%	→	→

= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

Consumption frequency

There has been a slight increase in wine consumption frequency in the last year, but a decrease overall versus 2020. The most frequent consumers of wine are Boomers with half drinking wine on more than one occasion each week

Wine consumption frequency: Tracking

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

	2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
Most days / every day	**8%**	**6%**	**6%**	→	→
2-5 times a week	**35%**	**27%**	**32%**	→	↑
About once a week	**34%**	**39%**	**34%**	→	↓
1-3 times a month	**23%**	**29%**	**29%**	↑	→

Wine consumption frequency: by generation

% who usually drink wine at the following frequency
Base = All Irish regular wine drinkers (n=1,005)

	All Irish Regular Wine Drinkers (n=1,005)	Gen Z 18-26 (n=91)	Millennials 27-42 (n=292)	Gen X 43-58 (n=312)	Boomers 59+ (n=310)
Most days / every day	**6%**	**2%**	**4%**	**5%**	**10%**
2-5 times a week	**32%**	**19%**	**25%**	**33%**	**40%**
About once a week	**34%**	**31%**	**39%**	**35%**	**29%**
1-3 times a month	**29%**	**48%**	**32%**	**27%**	**21%**

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

Off-trade consumption frequency

Off-trade wine consumption reached its highest frequency during the pandemic and is now reverting to pre-pandemic levels

Off-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the off-trade

	2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
A relaxing drink at the end of the day at home	**6.19**	**5.58**	**5.59**	↓	→
With an informal meal at home	**5.53**	**4.41**	**4.45**	↓	→
With a more formal dinner party at home	**1.88**	**1.55**	**1.58**	↓	→
At a party / celebration at home	**1.70**	**1.32**	**1.49**	→	→

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

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

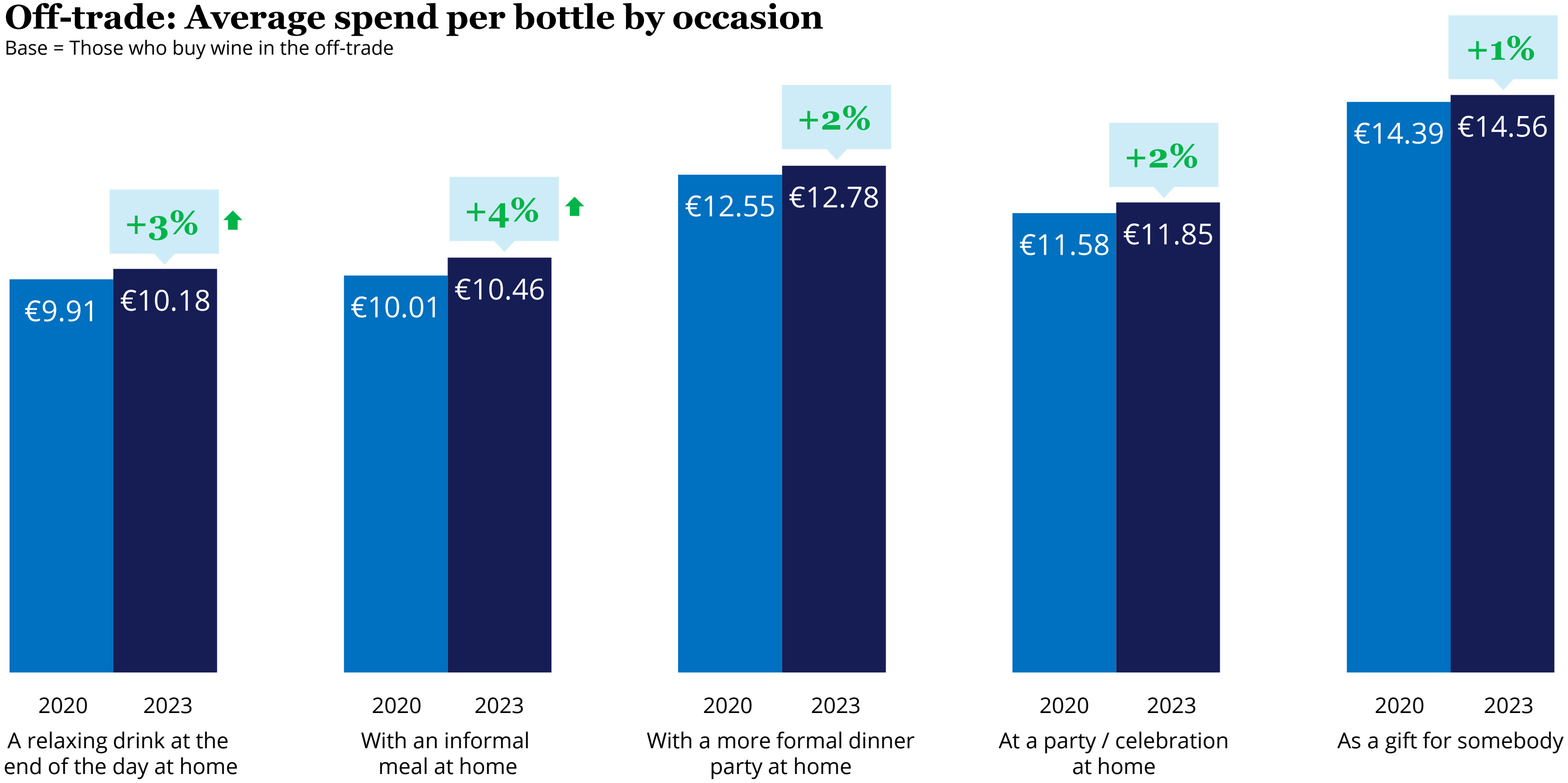
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

Average off-trade spend

Irish regular wine drinkers are spending significantly more than in 2020 on relaxed and informal meal occasions

Off-trade: Average spend per bottle by occasion

Base = Those who buy wine in the off-trade



Market context:

The introduction of minimum unit pricing had less effect on still wine than the earlier government ban on multibuys and loyalty discounts. The main Irish multiples are now using wine rather than beer or spirits as a footfall driver. Premium branded wines are routinely discounted down from €16 to €8 or €9

Executive Summary Report 2023 Ireland

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

Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '23, (n≥1,000) Irish regular wine drinkers

On-trade consumption

90% of respondents drink wine in the on-trade and the setting is important for the wine market in Ireland. A large proportion of respondents buy wine in restaurants. Gen Z over-indexes on consumption in bars and pubs

Wine purchase in on-trade

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

On-trade location		2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
Bar or pub	Yes	52%	49%	50%	→	→
	No	48%	51%	50%	→	→
Restaurant	Yes	92%	87%	88%	↓	→
	No	8%	13%	12%	↑	→
On-trade drinkers	Yes	93%	88%	90%	↓	→
	No	7%	12%	10%	↑	→

Wine purchase in on-trade: by generation

% who buy wine in a bar, pub or restaurant
Base = All Irish regular wine drinkers (n=1,005)

On-trade location		All Irish Regular Wine Drinkers (n=1,005)	Gen Z 18-26 (n=91)	Millennials 27-42 (n=292)	Gen X 43-58 (n=312)	Boomers 59+ (n=310)
Bar or pub	Yes	50%	64%	50%	49%	48%
	No	50%	36%	50%	51%	52%
Restaurant	Yes	88%	89%	91%	89%	86%
	No	12%	11%	9%	11%	14%
On-trade drinkers	Yes	90%	92%	93%	89%	86%
	No	10%	8%	7%	11%	14%

Market context:

Restaurants generally did less well as people started to venture out more to pubs and bars

Executive Summary Report 2023 Spain

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

On-trade consumption frequency

Frequency of consumption across all on-trade occasions is broadly in line with 2020, with the exception of formal dinner occasions

On-trade: Wine consumption frequency by occasion

Base = Those who buy wine in the on-trade

	2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
A relaxing drink out at the end of the day	**3.44**	**2.94**	**3.27**	➡	➡
With an informal meal in a pub / bar / restaurant	**1.74**	**1.54**	**1.69**	➡	➡
With a more formal dinner in a restaurant	**1.85**	**1.42**	**1.55**	⬇	➡
At a party / celebration / big night out	**1.46**	**1.25**	**1.41**	➡	➡

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

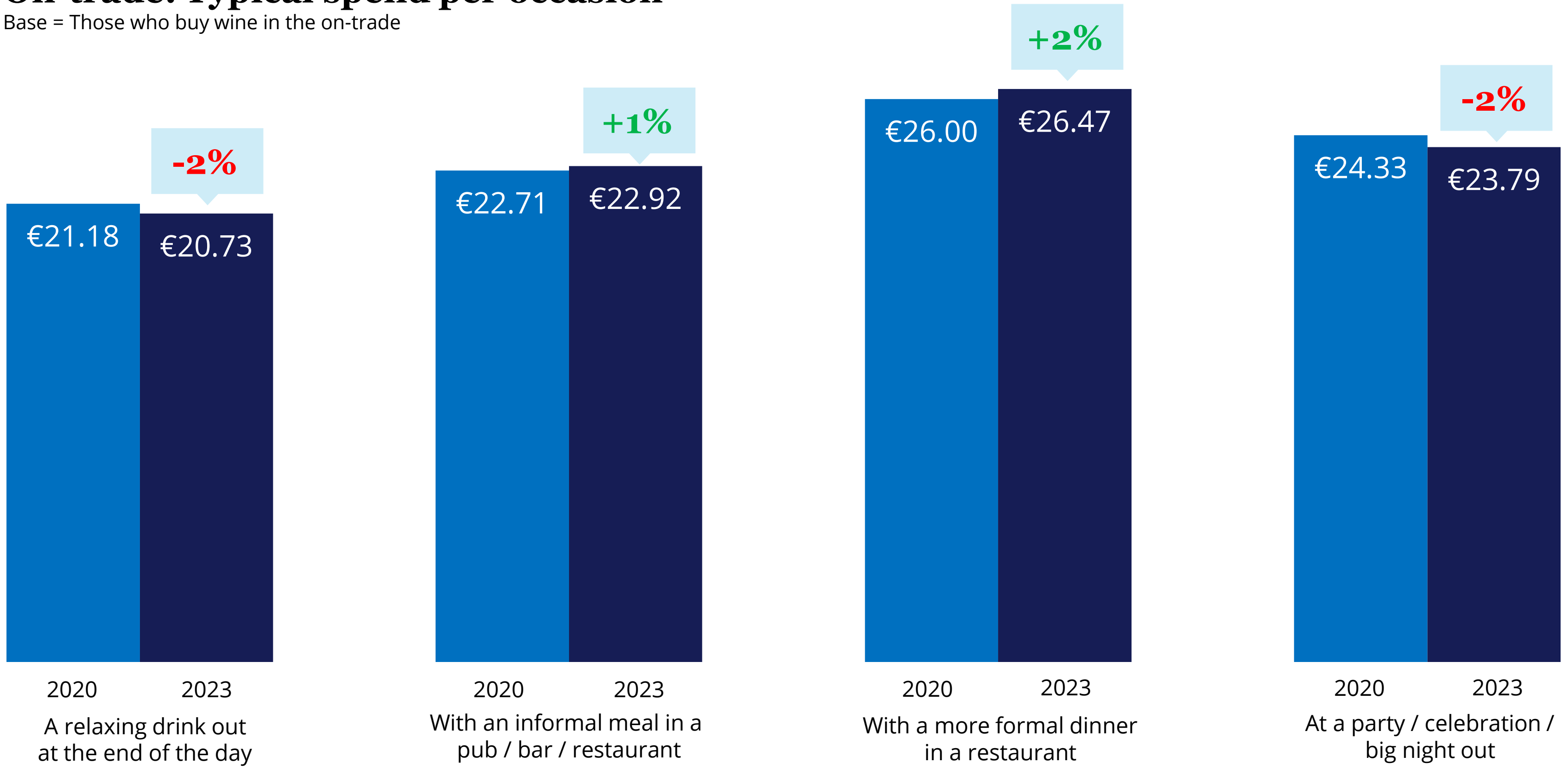
⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

Typical on-trade spend

The amount spent by respondents in the on-trade is broadly similar to 2020, which could indicate that many have reached the limit of what they are willing to spend

On-trade: Typical spend per occasion

Base = Those who buy wine in the on-trade



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

Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '23, (n≥1,000) Irish regular wine drinkers

Wine Views and Attitudes

Ireland Wine Landscapes

2023

Attitudes towards wine

Significantly fewer regular wine drinkers are willing to try new and different styles of wine than in 2020. Age groups are split on their attitudes, with Gen Z the most price-conscious, Millennials most willing to experiment and Boomers most likely to stay with what they know

Attitudes towards wine: Tracking

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

	2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
I enjoy trying new and different styles of wine on a regular basis	**46%**	**42%**	**41%**	⬇	➡
I don't mind what I buy so long as the price is right	**18%**	**20%**	**21%**	➡	➡
I know what I like and I tend to stick to what I know	**36%**	**38%**	**38%**	➡	➡

Attitudes towards wine by generation

% who 'agree' or 'strongly agree' with the following statements
Base = All Irish regular wine drinkers (n=1,005)

	All Irish Regular Wine Drinkers (n=1,005)	Gen Z 18-26 (n=91)	Millennials 27-42 (n=292)	Gen X 43-58 (n=312)	Boomers 59+ (n=310)
I enjoy trying new and different styles of wine on a regular basis	**41%**	**38%**	**60%**	**37%**	**28%**
I don't mind what I buy so long as the price is right	**21%**	**36%**	**21%**	**23%**	**16%**
I know what I like and I tend to stick to what I know	**38%**	**26%**	**20%**	**40%**	**56%**

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

Wine involvement

Involvement with wine has remained unchanged since 2020 with no significant difference between age groups

Wine involvement: Tracking

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

	2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
High involvement	**35%**	**35%**	**33%**	➡	➡
Medium involvement	**41%**	**41%**	**41%**	➡	➡
Low involvement	**24%**	**24%**	**26%**	➡	➡

Wine involvement by generation

Base = All Irish regular wine drinkers (n=1,005)

	All Irish Regular Wine Drinkers (n=1,005)	Gen Z 18-26 (n=91)	Millennials 27-42 (n=292)	Gen X 43-58 (n=312)	Boomers 59+ (n=310)
High involvement	**33%**	**24%**	**38%**	**31%**	**34%**
Medium involvement	**41%**	**42%**	**36%**	**43%**	**43%**
Low involvement	**26%**	**34%**	**26%**	**26%**	**23%**

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

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

Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

Involvement and perceived expertise (1)

Irish drinkers are less confident about their wine knowledge than in 2020; significantly more say they know less about it than other people; drinking wine for pleasure remains the leading involvement ranking

Involvement and perceived expertise in wine: Tracking

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

Ranking '23		2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
1	Drinking wine gives me pleasure	84%	84%	83%	→	→
2	I always look for the best quality wines I can get for my budget	81%	83%	80%	→	→
3	Deciding which wine to buy is an important decision	67%	67%	67%	→	→
4	I like to take my time when I purchase a bottle of wine	62%	63%	61%	→	→
5	Generally speaking, wine is reasonably priced	54%	54%	54%	→	→
6	I have a strong interest in wine	50%	49%	48%	→	→
7	Wine is important to me in my lifestyle	45%	44%	44%	→	→
8	Compared to others, I know less about the subject of wine	35%	39%	42%	↑	→
9	Generally speaking, wine is an expensive drink	38%	44%	40%	→	→
10	I feel competent about my knowledge of wine	42%	42%	39%	→	→
11	I don't understand much about wine	25%	27%	29%	↑	→

↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

Involvement and perceived expertise (2)

The least self-confident and most price-conscious age group is Gen Z

Involvement and perceived expertise in wine by generation

% who 'agree' or 'strongly agree' with the following statements
Base = All Irish regular wine drinkers (n=1,005)

Ranking '23		All Irish Regular Wine Drinkers (n=1,005)	Gen Z 18-26 (n=91)	Millennials 27-42 (n=292)	Gen X 43-58 (n=312)	Boomers 59+ (n=310)
1	Drinking wine gives me pleasure	83%	75%	80%	85%	88%
2	I always look for the best quality wines I can get for my budget	80%	70%	77%	82%	83%
3	Deciding which wine to buy is an important decision	67%	60%	71%	62%	70%
4	I like to take my time when I purchase a bottle of wine	61%	59%	66%	56%	60%
5	Generally speaking, wine is reasonably priced	54%	54%	59%	48%	55%
6	I have a strong interest in wine	48%	41%	51%	46%	51%
7	Wine is important to me in my lifestyle	44%	38%	47%	41%	46%
8	Compared to others, I know less about the subject of wine	42%	54%	45%	38%	40%
9	Generally speaking, wine is an expensive drink	40%	51%	36%	42%	39%
10	I feel competent about my knowledge of wine	39%	31%	42%	38%	40%
11	I don't understand much about wine	29%	44%	30%	26%	26%

% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Apr '23, Irish regular wine drinkers (n=1,005)

Wine knowledge and confidence

There has been a slight decrease in the knowledge and confidence index scores of Irish wine drinkers

Wine knowledge index: Tracking

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

	2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
Knowledge Index	**46.6**	**47.4**	**45.7**	➡	➡

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

-0.9 Index change

Wine confidence index: Tracking

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

	2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
Confidence Index	**53.0**	**52.4**	**51.7**	➡	➡

Wine confidence index (0–100) is calculated based on the extent to which consumers feel competent about their wine knowledge. Wine confidence index uses consumers' answers to three attitudinal statements: 1) I feel competent about my knowledge of wine / 2) Compared to others, I know less about the subject of wine / 3) I don't understand much about wine.
**Wine confidence index is the 'subjective' measurement of consumer confidence about their wine knowledge.

-1.3 Index change

⬆/⬇: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

Wine-drinking motivations

Wine drinkers are motivated by wine's ability to enhance food, help with relaxation and celebrate special occasions; a higher proportion of Gen Z view wine as a fashionable and sophisticated drink

Wine drinking motivations

% who selected the following as reasons why they drink wine
Base = All Irish regular wine drinkers (n=1,005)

Ranking '23		All Irish Regular Wine Drinkers (n=1,005)	Gen Z 18-26 (n=91)	Millennials 27-42 (n=292)	Gen X 43-58 (n=312)	Boomers 59+ (n=310)
1	Wine enhances food and meals	55%	49%	45%	53%	68%
2	Drinking wine makes me feel relaxed	54%	46%	52%	55%	55%
3	To celebrate special occasions	52%	57%	48%	49%	56%
4	I really love the taste of wine	49%	38%	48%	48%	56%
5	Wine is about sharing with a partner / close friend or family member	44%	41%	39%	43%	49%
6	Wine helps create a warm / friendly atmosphere	39%	44%	35%	33%	47%
7	Wine is about sharing something with others	37%	37%	32%	37%	41%
8	I treat myself with wine at the end of the day	27%	31%	22%	30%	27%
9	Wine is a refreshing drink	26%	34%	25%	21%	30%
10	Drinking wine can be good for my health	25%	15%	26%	22%	30%
11	I like shopping / choosing wines to drink	24%	21%	25%	21%	29%
12=	Most of my friends drink wine	22%	30%	24%	21%	20%
12=	I like learning about new wines	22%	22%	23%	21%	23%
14	Wine is a fashionable drink	17%	33%	17%	15%	15%
15	It makes people sophisticated	11%	21%	16%	8%	6%
16	It makes me feel individual and unique	9%	13%	12%	7%	6%

= Represents equal ranking
% / %: Statistically significantly higher / lower than all regular wine drinkers at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Apr '22, (n=1,005) Irish regular wine drinkers

Wine-buying choice cues

Wine choice cues generally align with 2020, although fewer people buy wine based on awards or recommendations in guide book

Wine choice cues: Tracking

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

Ranking '23		2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
1	Grape variety	76%	77%	76%	→	→
2	A brand I am aware of	69%	71%	71%	→	→
3	The country of origin	68%	67%	67%	→	→
4	Recommendation by friend or family	68%	68%	66%	→	→
5=	Promotional offer	64%	63%	63%	→	→
5=	The region of origin	60%	62%	63%	→	→
7	Wine that matches or complements food	63%	62%	61%	→	→
8	Taste or wine style descriptions displayed on the shelves or on wine labels	61%	61%	60%	→	→
9	Alcohol content	48%	52%	51%	→	→
10	Recommendations from shop staff or shop leaflets	41%	41%	40%	→	→
11	Appeal of the bottle and / or label design	34%	37%	34%	→	→
12	Recommendation by wine critic or writer	37%	34%	33%	→	→
13=	Recommendation by wine guide books	32%	29%	26%	↓	→
13=	Whether or not the wine has won a medal or award	31%	26%	26%	↓	→

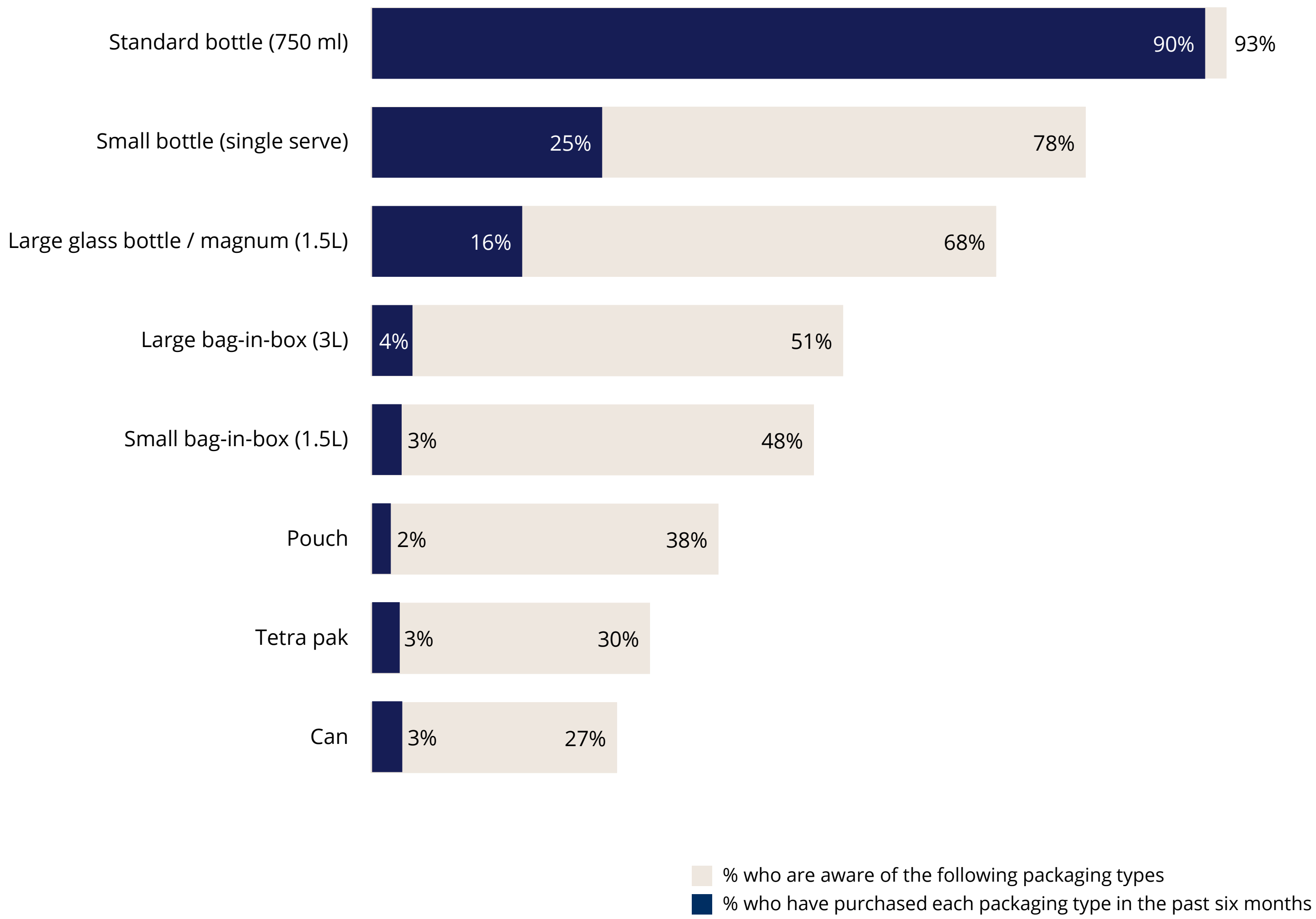
= Represents equal ranking
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

Packaging type consumption and awareness

Standard bottles are the most popular packaging format with Irish wine drinkers; around a quarter buy single-serve bottles

Packaging types: Awareness and consumption levels

% of those who are aware of or have purchased wine in the following packaging types in the past six months
Base = All Irish regular wine drinkers (n=1,005)



Source: Wine Intelligence, Vinitrac®, Ireland, Apr '23, (n=1,005) Irish regular wine drinkers

Packaging purchase

Gen Z and Millennials have significantly higher purchase incidences for alternative packaging formats. Two in five Gen Z drinkers have bought wine in a small bottle

Packaging purchase: Tracking

% who have purchased wine in the following packaging types in the past 6 months
Base = All Irish regular wine drinkers (n≥1,000)

Ranking '23		2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '22
1	Standard bottle (750 ml)	91%	90%	➡
2	Small bottle (single serve)	27%	25%	➡
3	Large glass bottle / magnum (1.5L)	16%	16%	➡
4	Large bag-in-box (3L)	4%	4%	➡
5=	Can	3%	3%	➡
5=	Small bag-in-box (1.5L)	4%	3%	➡
5=	Tetra pak	2%	3%	➡
8=	Pouch	2%	2%	➡

Packaging purchase: by generation

% who have purchased wine in the following packaging types in the past 6 months
Base = All Irish regular wine drinkers (n=1,005)

Ranking '23		All Irish Regular Wine Drinkers (n=1,005)	Gen Z 18-26 (n=91)	Millennials 27-42 (n=292)	Gen X 43-58 (n=312)	Boomers 59+ (n=310)
1	Standard bottle (750 ml)	90%	82%	87%	92%	92%
2	Small bottle (single serve)	25%	40%	26%	25%	19%
3	Large glass bottle / magnum (1.5L)	16%	27%	21%	13%	11%
4	Large bag-in-box (3L)	4%	7%	4%	3%	5%
5=	Can	3%	9%	5%	3%	1%
5=	Small bag-in-box (1.5L)	3%	5%	3%	3%	4%
5=	Tetra pak	3%	7%	6%	1%	1%
8=	Pouch	2%	4%	3%	1%	2%

= Represents equal ranking

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

Source: Wine Intelligence, Vinitrac® Ireland, Apr '22, Apr '23, (n≥1,005) Irish regular wine drinkers

Hot Topic: Consumer Sentiment

Ireland Wine Landscapes

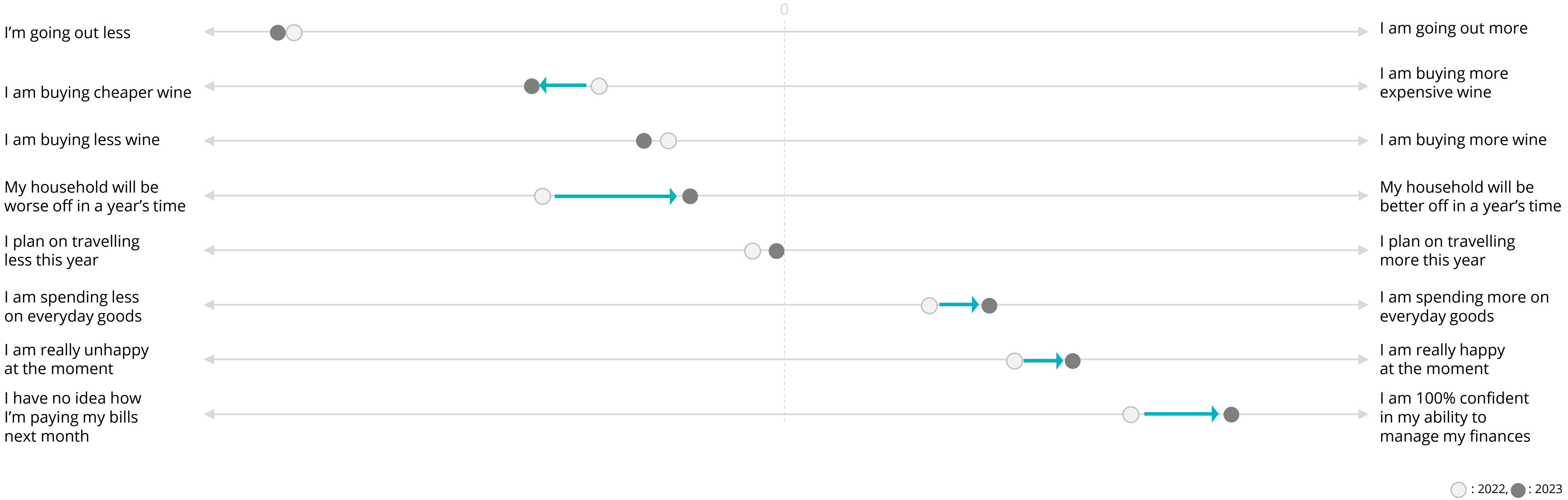
2023

HOT TOPIC
Consumer sentiment

‘Going out’ is most affected by the current economic situation with around the same proportion of drinkers saying they are going out less as last year; down-trading has worsened; there is a more positive outlook for spending on everyday goods and general wellbeing with more respondents feeling confident about their financial security

Consumer sentiment: tracked

Net score of % who agree with the negative statement subtracted from the % who agree with the positive statement
Minimum value: -49%, Maximum value: 43%
Base = All Irish regular wine drinkers (n>1,005)



Source: Wine Intelligence, Vinitrac® Ireland, Apr ‘22, Apr ‘23, (n≥1,005) Irish regular wine drinkers

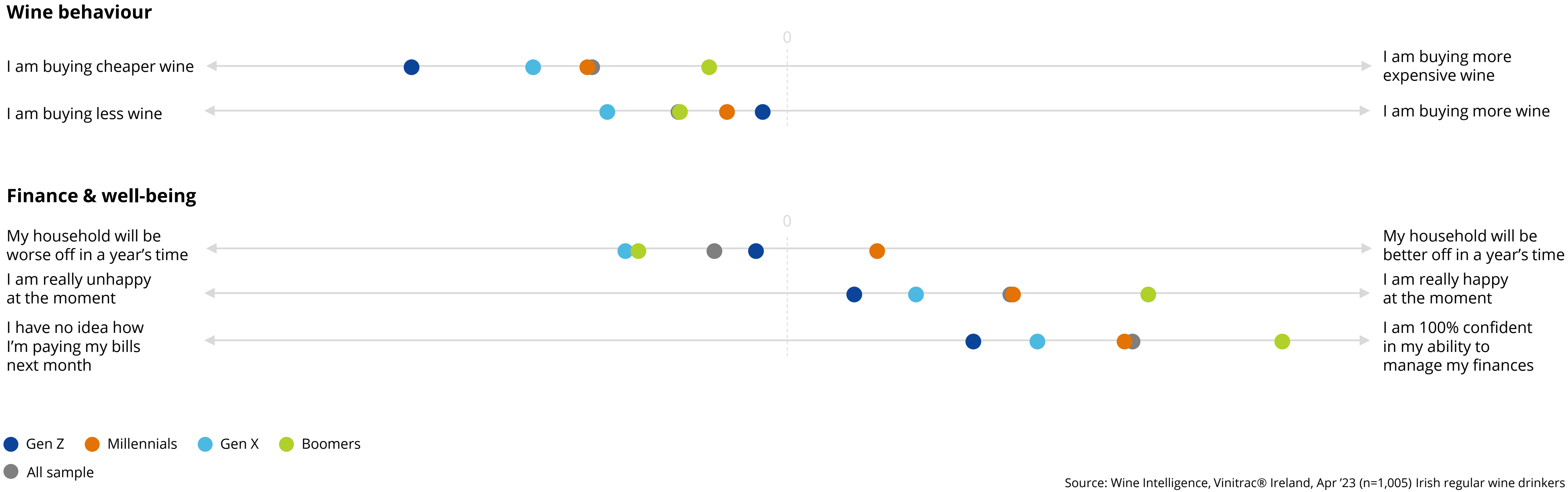
HOT TOPIC

Consumer sentiment

There is a clear distinction between age groups, with Boomers the least reactive to the economic squeeze; all groups are buying less expensive wine, with Gen Z leading the trend, although they are least likely to reduce the quantity bought; Millennials are only moderately reactive and are the most optimistic group

Consumer sentiment: by generation

Net score of % who agree with the negative statement subtracted from the % who agree with the positive statement
Minimum value: -62%, Maximum value: 62%
Base = All Irish regular wine drinkers (n=1,005)



Source: Wine Intelligence, Vinitrac® Ireland, Apr '23 (n=1,005) Irish regular wine drinkers

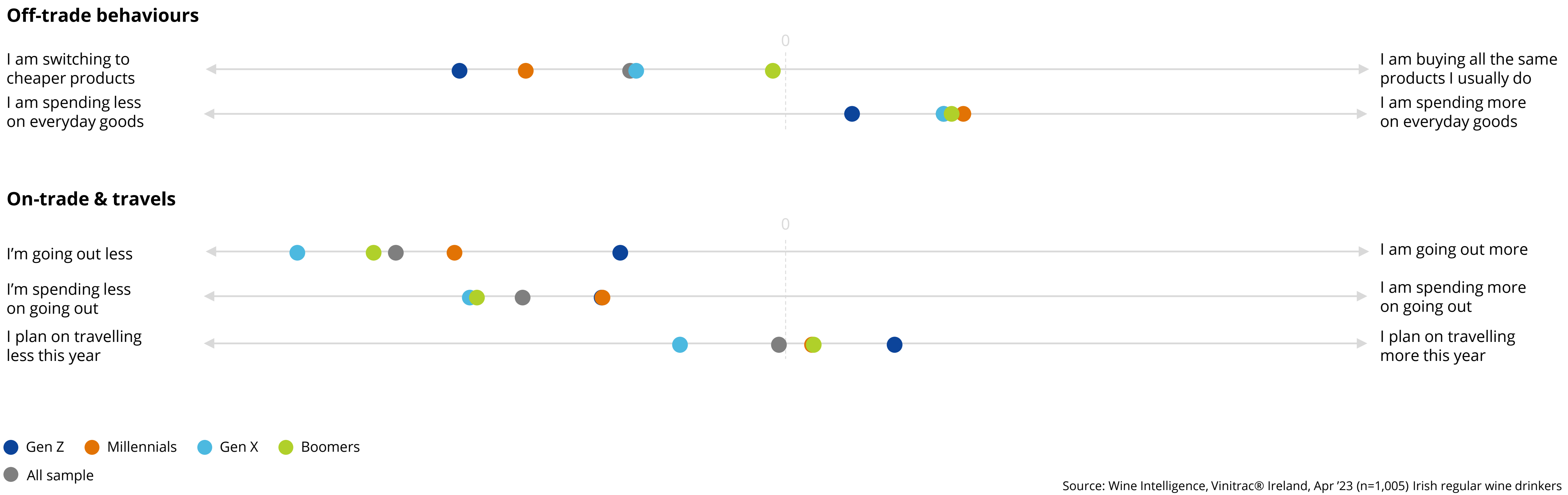
HOT TOPIC

Consumer sentiment

Gen Z are least willing to compromise on going out and travelling but have reduced their spending budgets for shopping generally; Gen X and Boomers are more likely to cut down on going out and travel plans but spend more on everyday goods

Consumer sentiment: by generation

Net score of % who agree with the negative statement subtracted from the % who agree with the positive statement
Minimum value: -62%, Maximum value: 62%
Base = All Irish regular wine drinkers (n=1,005)



Source: Wine Intelligence, Vinitrac® Ireland, Apr '23 (n=1,005) Irish regular wine drinkers

Hot Topic: Wine Closures

Ireland Wine Landscapes

2023

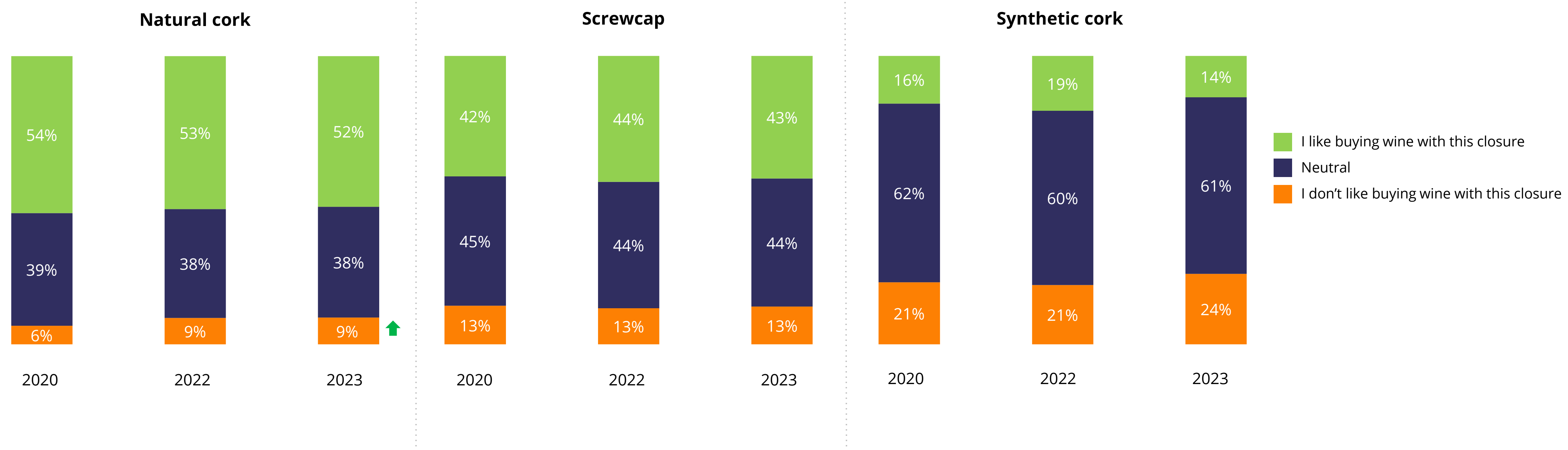
HOT TOPIC

Wine closures

A sizeable proportion of Irish respondents like purchasing wine with natural cork or screwcap closure; significantly more respondents are now say they don’t like buying wine with natural cork closures

Views on wine closures

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



/: Statistically significantly higher / lower than the Oct ‘20 wave at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct ’20, Apr ‘22, Apr ‘23, (n≥1,000) Irish regular wine drinkers

HOT TOPIC

Views on wine closure types

Greater numbers of Irish wine drinkers associate natural cork with being tradition and high quality but also outdated, while screw-cap is strongly associated with being practical and good for everyday drinking

Wine closure types imagery: positioning map

% who associate the following statements with each type of wine closure
Base = All Irish regular wine drinkers (n=1,005)

	Natural cork (n=1,005)	Screw-cap (n=1,005)	Synthetic cork (n=1,005)
Recyclable	35%	31%	23%
Modern	10%	41%	32%
Practical	11%	56%	16%
Affordable	14%	46%	23%
Good for everyday drinking	17%	46%	18%
Traditional	65%	6%	6%
Trustworthy	42%	22%	14%
High quality	54%	11%	9%
Sustainable	32%	21%	17%
Good for special occasions	45%	13%	10%
Opening a wine with this type of closure gives me pleasure	43%	14%	8%
Cheap	6%	34%	25%
Innovative	8%	23%	23%
Low quality	2%	20%	22%
Outdated	19%	6%	11%
None of the above	6%	6%	11%

Green / turquoise: Statistically significantly higher than 2 / 1 wine closure type at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Apr '22, (n=1,005) Irish regular wine drinkers

Brand Health

Ireland Wine Landscapes

2023

Global Wine Brand Power Index

Brand health measures included in the index

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

Wine Brand Power Index

Ireland Brand Power 2023

The top three most powerful brands are the same as last year

Casillero del Diablo — 1st

DADÁ — 2nd

120 — 3rd

Ireland Brand Power Index 2023

Wines from Argentina and Chile make up the top three in the Irish market; most brands outside the top three have lower index scores than in 2022

Ireland Brand Power Index 2023

The top 30 most powerful wine brands in the Irish market based on consumer feedback from six key brand health measures
Base = All Irish regular wine drinkers (n≥1,005)

Ranking '23		Final Index	Tracking vs 2022	Score difference vs 2022
1	Casillero del Diablo	99.4	=	0.1
2	Dadá	86.0	=	0.6
3	Santa Rita 120	86.0	=	0.5
4	Yellow Tail	78.2	=	-2.5
5	Oyster Bay	74.7	+3	-1.2
6	Wolf Blass	71.7	-1	-6.3
7	Jacob's Creek	71.1	-1	-6.0
8	McGuigan	69.2	-1	-7.1
9	Faustino	68.3	=	-4.4
10	Blossom Hill	67.7	+1	-3.6
11	Santa Rita	64.9	-1	-7.6
12	Barefoot	61.0	+5	0.5
13	Campo Viejo	59.5	-1	-4.5
14	Gallo Family Vineyards	59.4	-1	-2.9
15	Torres	55.9	+1	-4.9

Ranking '23		Final Index	Tracking vs 2022	Score difference vs 2022
16	Sangre de Toro	55.5	-2	-5.9
17	Cono Sur	53.7	-2	-7.6
18	Villa Maria	53.3	+2	-2.6
19	Eaglehawk	52.9	=	-3.1
20	Brancott Estate	50.7	-2	-5.3
21	i heart Wines	50.6	+1	-3.9
22	Rosemount Estate	48.5	+1	-5.4
23	Viña Sol	48.4	+2	-0.6
24	Hardys	46.7	-3	-8.1
25	The Bend in the River	46.2	n/a	n/a
26	Apothic	46.2	+1	-0.1
27	Lindeman's	44.8	-3	-6.0
28	Carmen	43.7	-2	-3.8
29	Dark Horse	40.4	+1	-1.4
30	Nederburg	38.7	+2	-1.6

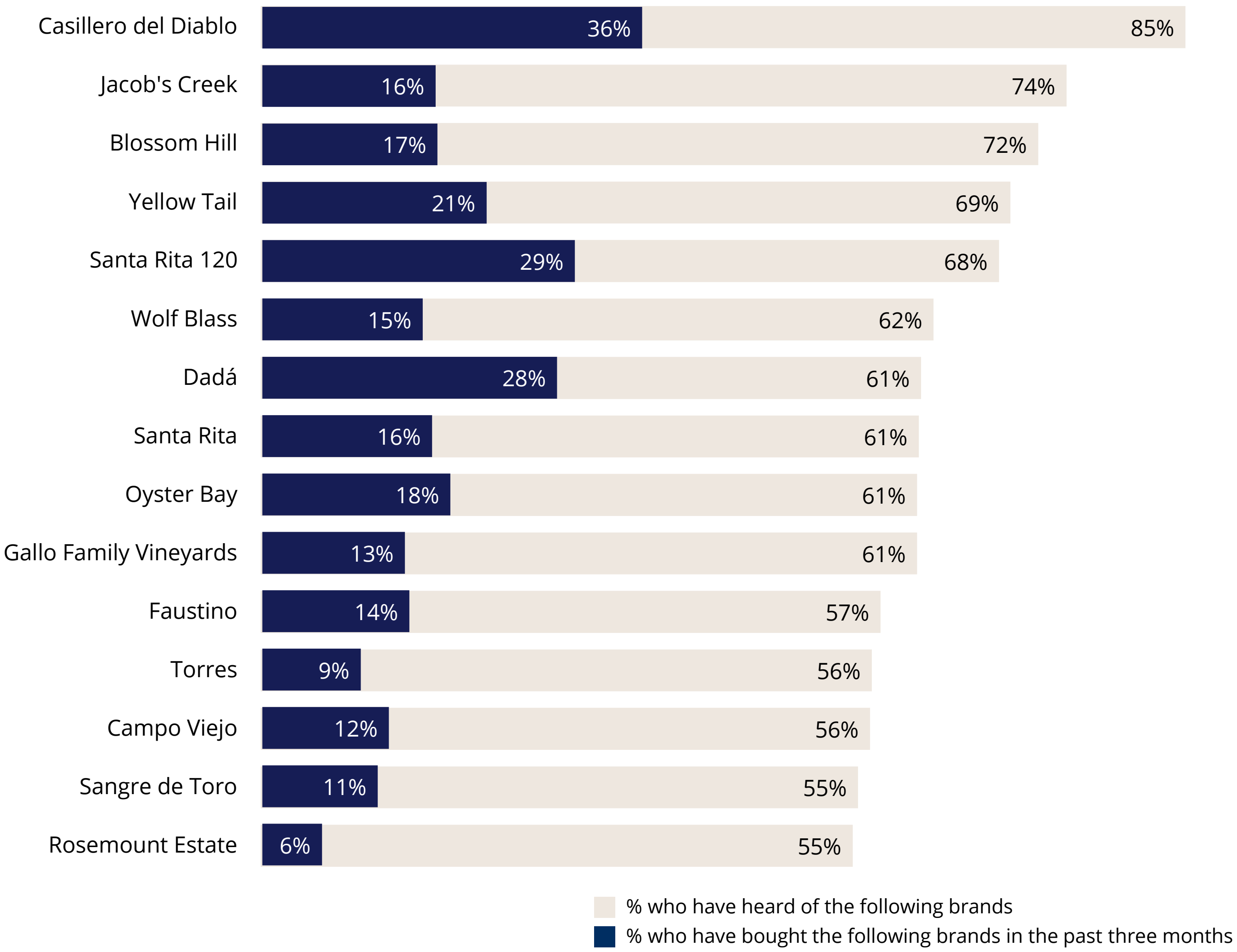
Source: Wine Intelligence, Vinitrac® Ireland, Oct '21 – Feb '22, Apr '23, (n≥1,005) Irish regular wine drinkers

Brand health: Consumption and awareness

Casillero del Diablo is the leading brand for both awareness and consumption. Santa Rita 10 and Dadà have high incidence rates for consumption relative to awareness

Brand health: Top 15 awareness and consumption levels

Base = All Irish regular wine drinkers (n=1,005)



Source: Wine Intelligence, Vinitrac®, Ireland, Apr '23, (n=1,005) Irish regular wine drinkers

Brand awareness: Tracking

Awareness incidences for several brands peaked in 2022, with significantly lower scores in 2023

Awareness: Tracking

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

Ranking '23		2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
1	Casillero del Diablo	81%	88%	85%	↑	↓
2	Jacob's Creek	73%	78%	74%	→	↓
3	Blossom Hill	71%	78%	72%	→	↓
4	Yellow Tail	64%	71%	69%	↑	→
5	Santa Rita 120	n/a	69%	68%	n/a	→
6	Wolf Blass	62%	67%	62%	→	↓
7=	Dadá	41%	65%	61%	↑	→
7=	Santa Rita	61%	66%	61%	→	↓
7=	Oyster Bay	55%	61%	61%	↑	→
7=	Gallo Family Vineyards	61%	63%	61%	→	→
11	Faustino	59%	60%	57%	→	→
12=	Torres	57%	59%	56%	→	→
12=	Campo Viejo	53%	54%	56%	→	→
14=	Sangre de Toro	55%	57%	55%	→	→
14=	Rosemount Estate	56%	54%	55%	→	→

Ranking '23		2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
16	McGuigan	53%	56%	53%	→	→
17	Barefoot	43%	46%	48%	↑	→
18	Lindeman's	48%	52%	47%	→	→
19	Carmen	43%	43%	45%	→	→
20=	Eaglehawk	42%	48%	44%	→	→
20=	Hardys	50%	50%	44%	↓	↓
22=	Viña Sol	43%	48%	43%	→	↓
22=	Villa Maria	37%	43%	43%	↑	→
24	Cono Sur	37%	42%	40%	→	→
25=	Brancott Estate	45%	47%	39%	↓	↓
25=	The Bend in the River	34%	46%	39%	↑	↓
27	Nederburg	34%	35%	33%	→	→
28	Echo Falls	31%	33%	31%	→	→
29	i heart Wines	19%	28%	28%	↑	→
30	Santa Helena	n/a	30%	27%	n/a	→

Results for all brands available in the data table

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

Brand purchase: Tracking

Dadà has narrowed the gap on Casillero del Diablo and Santa Rita 120 with a significantly higher purchase incidence than in 2020

Purchase: Tracking

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

Ranking '23		2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
1	Casillero del Diablo	36%	38%	36%	→	→
2	Santa Rita 120	n/a	32%	29%	n/a	→
3	Dadá	20%	31%	28%	↑	→
4	Yellow Tail	24%	25%	21%	→	→
5	Oyster Bay	18%	17%	18%	→	→
6	Blossom Hill	17%	20%	17%	→	→
7=	Jacob's Creek	19%	20%	16%	→	↓
7=	Santa Rita	19%	19%	16%	→	→
9=	McGuigan	18%	17%	15%	→	→
9=	Wolf Blass	20%	19%	15%	↓	↓
11=	Faustino	16%	14%	14%	→	→
11=	Barefoot	14%	12%	14%	→	→
13	Gallo Family Vineyards	12%	13%	13%	→	→
14	Campo Viejo	15%	14%	12%	→	→
15	Sangre de Toro	13%	12%	11%	→	→

Ranking '23		2020 (n=1,000)	2022 (n=1,013)	2023 (n=1,005)	Tracking vs. '20	Tracking vs. '22
16	Cono Sur	11%	11%	10%	→	→
17	Torres	14%	11%	9%	↓	→
18=	i heart Wines	7%	8%	8%	→	→
18=	Villa Maria	10%	10%	8%	→	→
18=	Eaglehawk	10%	9%	8%	→	→
18=	Brancott Estate	8%	10%	8%	→	→
22	Viña Sol	7%	8%	7%	→	→
23=	The Bend in the River	5%	7%	6%	→	→
23=	Carmen	8%	6%	6%	→	→
23=	Hardys	9%	7%	6%	↓	→
23=	Rosemount Estate	8%	8%	6%	↓	↓
27=	Lindeman's	5%	7%	4%	→	↓
27=	Nederburg	4%	5%	4%	→	→
27=	Apothic	4%	5%	4%	→	→
27=	Dark Horse	5%	4%	4%	→	→

Results for all brands available in the data table

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

Brand conversion: Tracking

The three most powerful brands in the Irish market all have conversion incidences over 40%, meaning they perform better than other brands among drinkers that are aware of them

Conversion: Tracking

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

Ranking '23		2020	2022	2023	Tracking vs. '20	Tracking vs. '22
1	Dadá	49%	48%	46%	→	→
2	Santa Rita 120	n/a	46%	43%	n/a	→
3	Casillero del Diablo	44%	43%	42%	→	→
4	Yellow Tail	37%	35%	31%	↓	→
5	i heart Wines	38%	30%	30%	→	→
6=	Oyster Bay	32%	28%	29%	→	→
6=	McGuigan	34%	30%	29%	→	→
8	Barefoot	32%	27%	28%	→	→
9=	Santa Rita	32%	28%	26%	↓	→
9=	Cono Sur	31%	27%	26%	→	→
11=	Wolf Blass	31%	28%	24%	↓	→
11=	Faustino	26%	23%	24%	→	→
13=	Apothic	35%	30%	23%	↓	→
13=	Blossom Hill	24%	25%	23%	→	→
15=	Gallo Family Vineyards	20%	21%	22%	→	→

Ranking '23		2020	2022	2023	Tracking vs. '20	Tracking vs. '22
15=	Jacob's Creek	26%	26%	22%	→	→
17=	Campo Viejo	27%	25%	21%	↓	→
17=	Espíritu de Chile	18%	15%	21%	→	→
17=	Brancott Estate	17%	21%	21%	→	→
20	Sangre de Toro	24%	21%	20%	→	→
21=	Villa Maria	27%	24%	19%	↓	→
21=	Luis Felipe Edwards	24%	15%	19%	→	→
23	Eaglehawk	23%	19%	18%	→	→
24=	Viña Sol	17%	16%	17%	→	→
24=	Finca Las Moras	n/a	n/a	17%	n/a	n/a
26=	Torres	24%	18%	16%	↓	→
26=	Aresti	23%	20%	16%	→	→
26=	The Bend in the River	14%	16%	16%	→	→
29	Dark Horse	24%	17%	15%	↓	→
30	Mouton Cadet	14%	12%	14%	→	→

Results for all brands available in the data table

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

Brand consideration: Tracking

Consideration incidences among Irish respondents have declined significantly for brands in the top 15; this aligns with the decreased willingness of respondents to be experimental in their wine choices

Consideration: Tracking

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

Ranking '23		2020	2022	2023	Tracking vs. '20	Tracking vs. '22
1=	Casillero del Diablo	64%	59%	59%	↓	→
1=	Dadá	61%	63%	59%	→	→
3	Santa Rita 120	n/a	62%	56%	n/a	↓
4=	Yellow Tail	60%	57%	53%	↓	→
4=	Wolf Blass	63%	55%	53%	↓	→
4=	Oyster Bay	60%	56%	53%	↓	→
7	McGuigan	61%	57%	52%	↓	→
8	Apothic	56%	55%	51%	→	→
9	Faustino	58%	50%	49%	↓	→
10=	i heart Wines	51%	54%	48%	→	→
10=	Santa Rita	55%	51%	48%	↓	→
12=	Jacob's Creek	54%	49%	47%	↓	→
12=	Barefoot	50%	50%	47%	→	→
14=	Cono Sur	55%	48%	45%	↓	→
14=	Villa Maria	55%	50%	45%	↓	→

Ranking '23		2020	2022	2023	Tracking vs. '20	Tracking vs. '22
14=	Brancott Estate	49%	45%	45%	→	→
17=	Espíritu de Chile	44%	46%	44%	→	→
17=	Eaglehawk	50%	48%	44%	→	→
17=	Campo Viejo	52%	48%	44%	↓	→
20=	Dark Horse	46%	39%	42%	→	→
20=	Mouton Cadet	46%	36%	42%	→	→
20=	Sangre de Toro	51%	46%	42%	↓	→
23=	Aresti	44%	43%	41%	→	→
23=	Gallo Family Vineyards	44%	42%	41%	→	→
23=	The Bend in the River	40%	41%	41%	→	→
26=	Torres	51%	42%	40%	↓	→
26=	Finca Las Moras	n/a	n/a	40%	n/a	n/a
26=	Blossom Hill	44%	42%	40%	→	→
29=	Long Mountain	42%	35%	38%	→	→
29=	Viña Sol	43%	41%	38%	→	→

Results for all brands available in the data table

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

Brand affinity: Tracking

Affinity for brands is significantly lower than in 2020

Affinity: Tracking

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

Ranking '23		2020	2022	2023	Tracking vs. '20	Tracking vs. '22
1	Casillero del Diablo	50%	51%	51%	→	→
2	Dadá	50%	53%	49%	→	→
3	Santa Rita 120	n/a	51%	45%	n/a	↓
4	Oyster Bay	49%	45%	43%	↓	→
5	Yellow Tail	46%	42%	42%	→	→
6=	Faustino	43%	41%	41%	→	→
6=	McGuigan	49%	42%	41%	↓	→
8	Wolf Blass	52%	42%	39%	↓	→
9=	i heart Wines	47%	43%	36%	↓	→
9=	Apothic	47%	42%	36%	↓	→
9=	Barefoot	43%	37%	36%	↓	→
12=	Jacob's Creek	42%	38%	33%	↓	→
12=	Eaglehawk	38%	34%	33%	→	→
12=	Blossom Hill	36%	36%	33%	→	→
15=	Santa Rita	44%	37%	32%	↓	→

Ranking '23		2020	2022	2023	Tracking vs. '20	Tracking vs. '22
15=	Villa Maria	40%	37%	32%	↓	→
15=	Cono Sur	41%	36%	32%	↓	→
15=	Campo Viejo	44%	38%	32%	↓	↓
19=	Finca Las Moras	n/a	n/a	30%	n/a	n/a
19=	Brancott Estate	38%	33%	30%	↓	→
19=	Viña Sol	30%	27%	30%	→	→
19=	Mouton Cadet	35%	26%	30%	→	→
23=	Aresti	32%	26%	29%	→	→
23=	Luis Felipe Edwards	36%	26%	29%	→	→
23=	Dark Horse	33%	27%	29%	→	→
23=	Torres	39%	31%	29%	↓	→
27=	Espíritu de Chile	32%	28%	28%	→	→
27=	The Bend in the River	29%	31%	28%	→	→
27=	George Wyndham	32%	28%	28%	→	→
30=	Gallo Family Vineyards	32%	30%	27%	→	→

Results for all brands available in the data table

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

Brand recommendation: Tracking

Recommendation incidences have declined significantly for several brands

Recommendation: Tracking

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

Ranking '23		2020	2022	2023	Tracking vs. '20	Tracking vs. '22
1=	Dadá	46%	54%	45%	→	↓
1=	Casillero del Diablo	47%	46%	45%	→	→
3	Santa Rita 120	n/a	46%	41%	n/a	↓
4	Oyster Bay	44%	41%	39%	→	→
5=	Wolf Blass	45%	40%	37%	↓	→
5=	McGuigan	43%	39%	37%	→	→
7	Apothic	35%	38%	36%	→	→
8=	Faustino	42%	38%	35%	↓	→
8=	Yellow Tail	39%	37%	35%	→	→
10	Barefoot	32%	33%	31%	→	→
11=	i heart Wines	38%	34%	29%	↓	→
11=	Jacob's Creek	33%	31%	29%	→	→
13	Villa Maria	34%	35%	28%	→	↓
14=	Cono Sur	32%	32%	27%	→	→
14=	Blossom Hill	27%	30%	27%	→	→

Ranking '23		2020	2022	2023	Tracking vs. '20	Tracking vs. '22
16=	Espíritu de Chile	24%	25%	26%	→	→
16=	Brancott Estate	30%	29%	26%	→	→
16=	Finca Las Moras	n/a	n/a	26%	n/a	n/a
16=	Santa Rita	33%	32%	26%	↓	↓
16=	Campo Viejo	37%	32%	26%	↓	↓
21=	Torres	28%	25%	25%	→	→
21=	Dark Horse	27%	23%	25%	→	→
23=	Yalumba	n/a	22%	24%	n/a	→
23=	Gallo Family Vineyards	24%	25%	24%	→	→
23=	Eaglehawk	27%	29%	24%	→	→
26=	Sangre de Toro	31%	29%	22%	↓	↓
26=	The Bend in the River	22%	26%	22%	→	→
26=	Hardys	26%	22%	22%	→	→
29=	Viña Sol	26%	26%	21%	→	→
29=	Mouton Cadet	28%	24%	21%	→	→

Results for all brands available in the data table

= Represents equal ranking
n/a = tracking unavailable for this wave
↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

Research Methodology

Ireland Wine Landscapes

2023

Research methodology

QUANTITATIVE

Data was collected in Ireland since October 2020.

The October 2020 and April 2022 waves were tracked against April 2023.

Data was gathered via Wine Intelligence's Vinitrac® online survey.

Respondents were screened to ensure that they: were at least 18 years old; drank red, white or rosé wine at least once a month; and bought wine in the off-trade or in the on-trade.

Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis.

The data is representative of Irish regular wine drinkers in terms of gender* and age.

The distribution of the sample is shown in the table.

			Oct-20	Apr-22	Apr-23
		n=	1,000	1,013	1,005
Gender*	Male		48%	47%	49%
	Female		52%	52%	50%
	Total		***100%***	***99%***	***100%***
Age	18-24		8%	6%	7%
	25-34		18%	18%	17%
	35-44		19%	21%	19%
	45-54		16%	17%	20%
	55-64		14%	14%	14%
	65 and over		24%	23%	24%
	Total		***100%***	***100%***	***100%***

Source: Wine Intelligence, Vinitrac®, Ireland, Oct '20, Apr '22, Apr '23, (n≥1,000) Irish regular wine drinkers

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

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