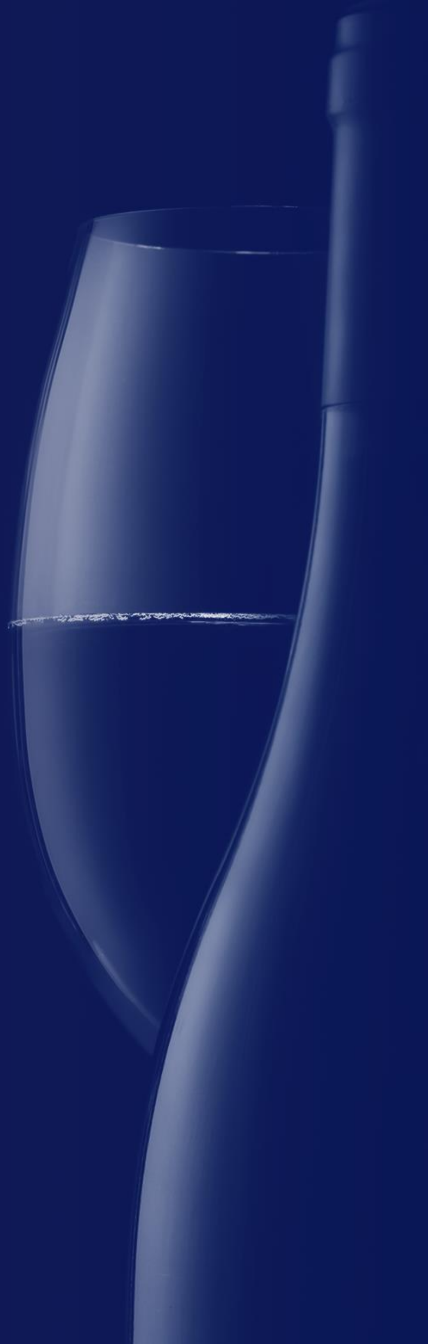
IWSR
drinks market analysis

United Kingdom

Wine Landscapes 2024



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IWSR Viewpoint

The UK wine-drinking population is larger post-pandemic, yet sales volumes have dipped from a peak in 2020, particularly in the value wine segment

Since 2019, the UK has added 2.3m more monthly wine drinkers, driven by heightened engagement in the wine category. However, signs of a peak emerged in 2022, with a decline of 500,000 monthly and 800,000 weekly wine drinkers, though the numbers remain higher than before the pandemic.

Despite the growth in the wine-drinking population, volumes of still wine sold in the UK have taken a downturn recently, with a fall in per capita consumption. 2020 marked a peak in wine volumes sold, with declines in still wine sales in 2021 and 2022 indicating a market realignment after a pandemic-driven surge. The most pronounced dip in sales volumes was at premium-and-below price points.

The demographic make-up of UK regular wine drinkers has changed in recent years, with a greater proportion of the wine-drinking population coming from households with high incomes. This could indicate that lower-income households are leaving the wine category, pushed out by higher prices that are driven by inflation and higher duty rates.

Attitudes adopted by UK regular wine drinkers during the pandemic persist, with a 'new normal' approach. Approximately half of respondents view wine as integral to their lifestyles, with strong interest displayed. Millennials are the most engaged age group.

Regular wine drinkers are exhibiting increased confidence about their personal situations compared to previous years, with more happiness and financial confidence. However, this optimism hasn't directly translated into the wine category, with most respondents opting to buy fewer and cheaper wines.

The on-trade faces ongoing challenges, with a considerable decline in regular wine drinkers compared to pre-pandemic times, most notably in restaurants. There has also been a significant decrease in frequency of consumption among those still drinking wine in the on-trade, across all occasions.

Opportunities

- Growing wine drinking population.
- Larger partcipation of high-income households.
- High involvement with wine.
- Increasing optimism of regular wine drinkers.

Threats

- Declining volumes of wine sold.
- Falling per capita consumption.
- Regular wine drinkers buying less and cheaper wine.

Management Summary

Key takeaways

1. Wine population peaked in 2022

2. Sharp decline in wine volume

3. Consumer sentiment improves

4. Respondents typically spending more

5. High involvement the 'new normal'

6. Realignment in the wine brand space

1. Wine population peaked in 2022

The UK's monthly and weekly wine-drinking populations are bigger in 2023 than in 2019, although they have declined since 2022

2019

Regular wine drinkers (drink wine at least once per month)

25.7m[1]

77%

Weekly wine drinkers

19.8m[4]

2022

Regular wine drinkers (drink wine at least once per month)

28.5m[2]

80%

Weekly wine drinkers

22.8m[4]

2023

Regular wine drinkers (drink wine at least once per month)

28m[3]
+8.9% vs 2019
-1.8% vs 2022

77%

Weekly wine drinkers

21.6m[4]
+9.1% vs 2019
-5.3% vs 2019

1 IWSR online calibration studies with Opinium, 2019, UK adults 18+.Wine = still light wine (red, white, rosé)
2 IWSR online calibration studies, rolling average of June 2021 and June 2022 (n=2,231) UK adults,18+. Wine = still light wine (red, white, rosé)
3 IWSR online calibration studies, 2019 with Opinium (n=2,000), rolling average of 2022 and 2023 (n=9,707) UK adults,18+. Wine = still light wine (red, white, rosé)
4 Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥,2007) UK regular wine drinkers

2. Sharp decline in wine volume

The UK wine market experienced a large year-on-year contraction, particularly in the still wine category; this indicates a market realignment after a surge in wine volumes during the pandemic

Total wine volumes by category

000s 9-litre cases

	2017	2020	2021	2022	2027 F	CAGR 17-22	CAGR 20-21	CAGR 21-22	CAGR F 22-27
Total Wine	132,858.70	131,727.50	130,322.10	121,114.40	116,447.64	-2.0%	-1.1%	-7.1%	-1.9%
Still Wine	115,205.80	115,033.60	111,529.00	103,106.10	92,574.15	-2.2%	-3.0%	-7.6%	-2.1%
Sparkling Wine	17,653.00	16,693.90	18,793.10	18,008.40	17,606.64	0.4%	12.6%	-4.2%	-0.5%

Market context

"The market had been in decline for some time until 2020's rise, which was prompted by the closure of the on-trade during Covid-19 and still wine being well-suited to home consumption."

Executive Summary Report 2023, UK

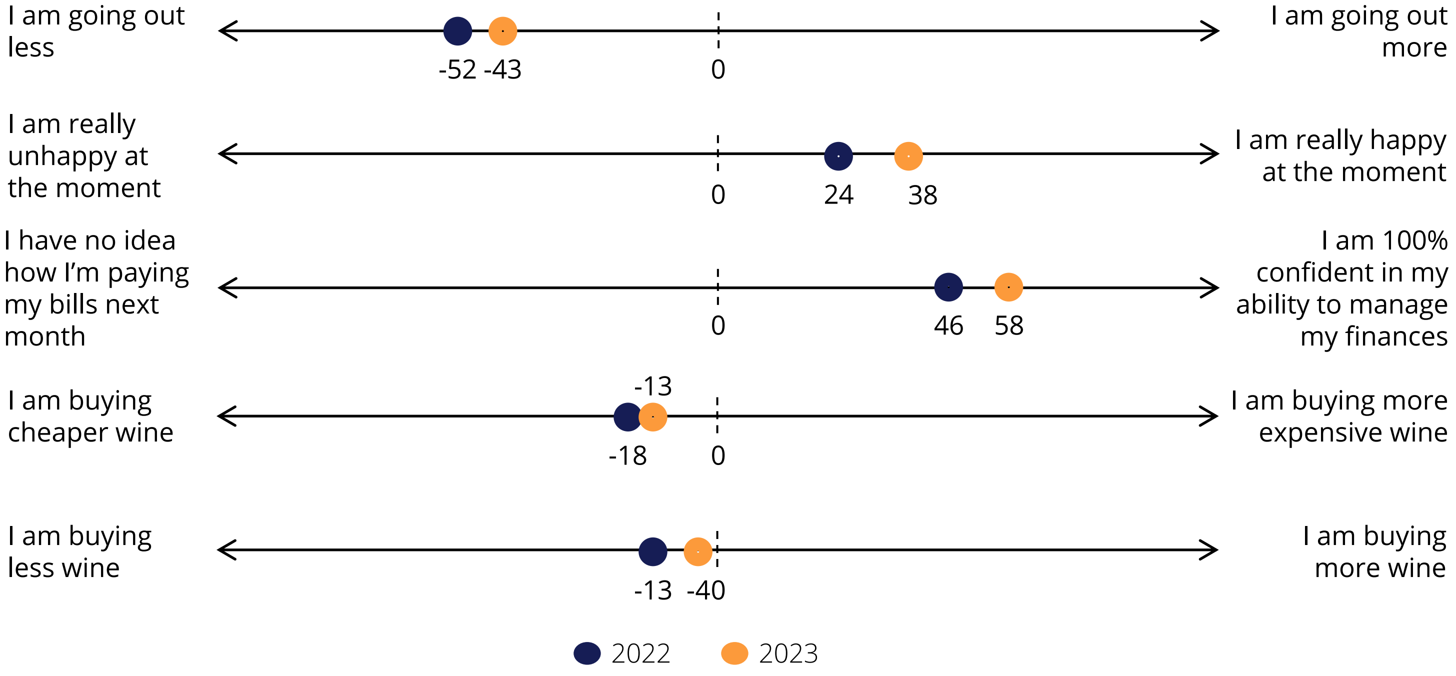
*Wine includes still wine, sparkling wine, fortified wine and light aperitifs
Source: IWSR

3. Consumer sentiment improves

UK regular wine drinkers are broadly more confident about their current situation than they were in 2022, although this new-found confidence has not prevented them from buying less or cheaper wine

Consumer sentiment

Net score of percentage who agree with leftmost statement subtracted from the percentage who agree with the rightmost statement



Base: All UK regular wine drinkers (n≥2,007)
Source: IWSR, Vinitrac® UK, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Market context

"There is increasing talk of 'two nations': on the one hand, the 'affluent insulated', for whom the current high inflation is having less impact on their discretionary spend; and on the other hand, 'constrained' consumers for whom energy and food inflation are not only affecting their discretionary spend, but also seeing them trade down or even leave the category altogether."

Executive Summary Report 2023, UK

4. Respondents typically spending more

A rise in typical spend can be attributed to premiumisation, inflation and increases in alcohol duty that have all pushed up wine prices

Still wine by price band

000s 9-litre cases

	2021	2022	2027 F	CAGR 21-22	CAGR F 22-27
Low-Price (under GBP 4.00)	821.00	820.50	1,019.00	-0.1%	4.4%
Value (between GBP 4.00 and 5.99)	25,663.70	23,197.33	20,349.55	-9.6%	-2.6%
Standard (between GBP 6.00 and 9.49)	62,450.52	57,647.94	50,076.75	-7.7%	-2.8%
Premium (between GBP 9.50 and 16.49)	18,991.73	17,909.06	17,452.25	-5.7%	-0.5%
Super Premium (between GBP 16.50 and 33.99)	2,855.72	2,800.94	2,922.30	-1.9%	0.9%
Ultra Premium (between GBP 34.00 and 51.99)	457.97	448.00	462.15	-2.2%	0.6%
Prestige (over GBP 52.00)	288.31	282.20	292.05	-2.1%	0.7%

Typical spend per bottle by setting

Those who buy wine in the off-trade or on-trade

Typical spend per bottle in the following settings	2019	2022	2023	Tracking vs. '19	Tracking vs. '22
Off-trade	GBP 7.99	GBP 8.77	GBP 9.01	↑	↑
On-trade	GBP 15.22	GBP 16.88	GBP 16.51	↑	→

Base: Those who buy wine in the off-trade or on-trade;
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

5. High involvement the ‘new normal’

There are more highly involved consumers than before the pandemic; following on from the trend in 2022, wine is important to the lifestyles of more consumers than pre-pandemic

Wine involvement: Tracking

	2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
High involvement	33%	37%	38%	↑	→
Medium involvement	39%	40%	39%	→	→
Low involvement	28%	23%	23%	↓	→

Involvement and perceived expertise in wine: Tracking

Percentage who ‘agree’ or ‘strongly agree’ with the following statements

Ranking '23		2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
1	Drinking wine gives me pleasure	85%	88%	88%	↑	→
3	Deciding which wine to buy is an important decision	63%	68%	67%	↑	→
6	Wine is important to me in my lifestyle	44%	52%	52%	↑	→
7	I have a strong interest in wine	45%	47%	48%	↑	→

Base: All UK regular wine drinkers (n≥2,007);
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

6. Realignment in the wine brand space

The wine brand space is evolving, with awareness and purchase of individual brands among regular wine drinkers either increasing or decreasing significantly

Brand awareness: Tracking, top 5

Percentage who have heard of the following brands

Ranking '23		2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
1	Casillero del Diablo	77%	75%	79%	→	↑
2	Blossom Hill	83%	78%	77%	↓	→
3	Jacob's Creek	84%	77%	77%	↓	→
4	Yellow Tail	70%	73%	74%	↑	→
5	Echo Falls	81%	74%	72%	↓	→

Brand purchase: Tracking

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

Ranking '23		2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
1	Yellow Tail	26%	29%	29%	↑	→
2	Casillero del Diablo	22%	22%	24%	→	↑
3	Blossom Hill	24%	22%	22%	↓	→
4	Echo Falls	23%	18%	18%	↓	→
5	Hardys	20%	17%	18%	↓	→

Base: All UK regular wine drinkers (n≥2,007)
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level;
Source: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Management summary: tracking metrics

A significantly smaller proportion of UK regular wine drinkers are consuming white wine and Prosecco than in 2019. There have also been significant changes to brand purchase rates

Top alcoholic beverages

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

	2019	2023	Tracking
White wine	81%	77%	↓
Red wine	74%	73%	→
Beer	64%	65%	→
Prosecco	60%	54%	↓
Gin	50%	50%	→

Top country of origin

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

	2019	2023	Tracking
France	52%	47%	↓
Italy	43%	45%	→
Australia	44%	42%	→
Spain	39%	40%	→
South Africa	37%	36%	→

Top region of origin

Percentage who have drunk wine from the following regions in the past six months

	2019	2023	Tracking
Prosecco	34%	31%	↓
Rioja	25%	23%	→
Bordeaux	20%	19%	→
Cava	16%	15%	→
Champagne	17%	15%	→

Top wine brands

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

	2019	2023	Tracking
Yellow Tail	26%	29%	↑
Casillero del Diablo	22%	24%	→
Blossom Hill	24%	22%	↓
Echo Falls	23%	18%	↓
Hardys	20%	18%	↓

Base: All UK regular wine drinkers (n≥2,007);
↑/↓: Statistically significantly higher/lower than March/July 2019 at a 95% confidence level
Source: IWSR, Vinitrac® UK, March/July 2019 and October 2023 (n≥2,007), UK regular wine drinkers

Management Summary: tracking metrics

UK regular wine drinkers are consuming less of the most common varietals than in 2019, though Malbec has become more popular; a significantly greater proportion of respondents purchase wine from Tesco

Top red varietals

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

	2019	2023	Tracking
Merlot	56%	52%	↓
Malbec	33%	39%	↑
Cabernet Sauvignon	44%	39%	↓
Shiraz / Syrah	41%	38%	↓
Pinot Noir	36%	33%	↓

Top wine-buying channels

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

	2019	2023	Tracking
In a supermarket	84%	83%	→
In a discount store	37%	38%	→
From a supermarket website	21%	25%	↑
In a corner / convenience shop	23%	24%	→
In a wine shop / off licence chain	21%	20%	→

Top white varietals

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

	2019	2023	Tracking
Sauvignon Blanc	57%	56%	→
Pinot Grigio / Pinot Gris	53%	50%	↓
Chardonnay	51%	45%	↓
Pinot Blanc	26%	24%	→
Chenin Blanc	24%	22%	↓

Top wine-buying retailers

Percentage who mainly use the following retailers to buy wine

	2019	2023	Tracking
Tesco	44%	47%	↑
Sainsbury's	28%	30%	→
Aldi	21%	22%	→
Asda	22%	21%	→
Lidl	16%	16%	→

Base: All UK regular wine drinkers (n≥2,007);
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® UK, March/July 2019 and October 2023 (n≥2,007), UK regular wine drinkers

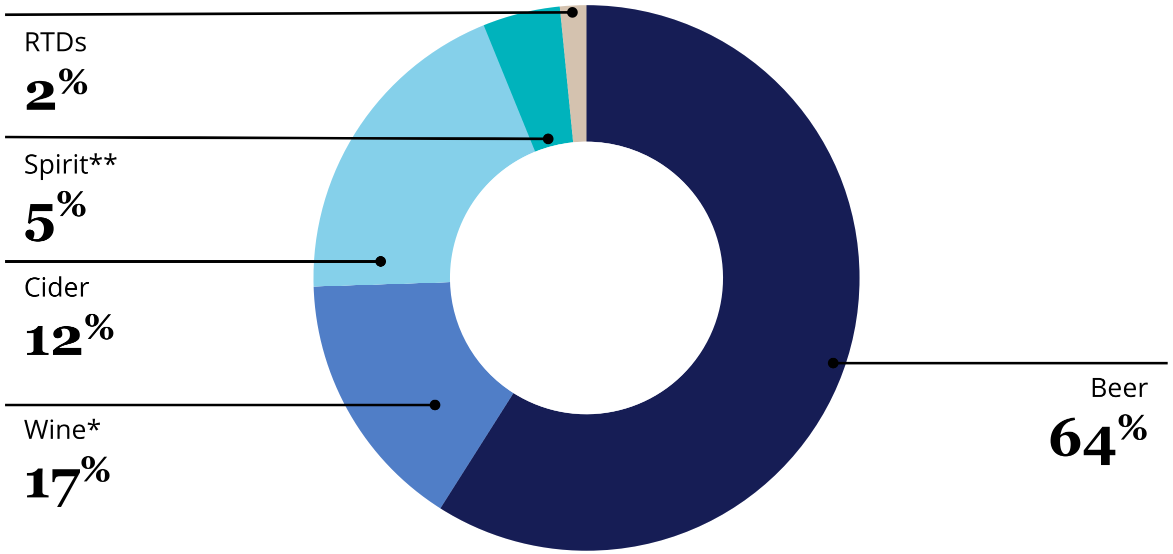
Market Data

Alcohol market share by category

Wine accounts for around a fifth of the UK's total beverage alcohol market, though volumes declined by 2% between 2017 and 2022

Total beverage alcohol market share by category

Percentage 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	740,969.78	758,004.81	-0.6%	-0.6%
Beer	464,658.33	487,333.33	-0.1%	-0.4%
Wine*	138,284.78	128,263.37	-2.0%	-1.9%
Cider	86,966.67	91,825.00	-2.9%	-0.2%
Spirit**	38,957.26	37,594.51	2.4%	-0.9%
RTDs	12,102.75	12,988.60	9.5%	1.7%

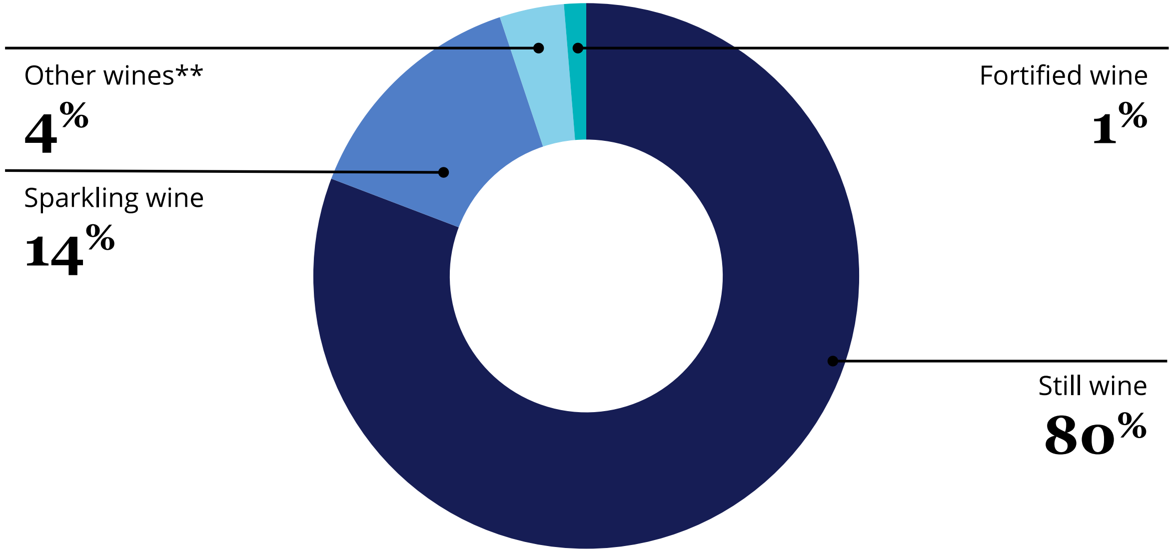
*Wine includes still wine, sparkling wine, fortified wine and light aperitifs
**Spirits includes whisky, gin and genever, vodka, agave-based spirits, national spirits, rum
Source: IWSR

Total wine market volumes

All wine sub-categories except sparkling saw their UK volumes decline between 2017 and 2022. All wine segments are forecast to decline over the next five years

Total wine share by category*

Percentage of purchases that fall within the categories below



*Light aperitifs omitted from pie chart due to small market share (less than 1%)
**Other Wines includes non-grape based wines
Source: IWSR

Total wine volumes by category

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Total Wine	138,284.78	128,263.37	-2.0%	-1.9%
Still Wine	111,529.03	103,106.05	-2.2%	-2.1%
Sparkling Wine	18,793.05	18,008.35	0.4%	-0.5%
Other Wines**	5,286.25	4,823.55	-5.2%	-2.4%
Fortified Wine	1,967.05	1,665.22	-3.3%	-2.6%
Light Aperitifs	709.40	660.20	-2.8%	-3.7%

Market context

“The market for still wine contracted rather more quickly than expected in 2022. This was driven not just by the return to the on-trade naturally supressing at-home wine consumption, but also by differing behaviour among younger and older drinkers, as well as the effects of the cost-of-living crisis.“

Executive Summary Report 2023, UK

Still wine volumes by origin

Almost all leading countries of origin are selling less wine in the UK market than in previous years, with the most notable decreases experienced by European, South African and US wines

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	111,529.03	103,106.05	-2.2%	-2.1%	
1	Australian	23,475.00	22,489.00	-1.0%	-2.2%	22%
2	French	13,416.10	12,122.52	-3.3%	-2.7%	12%
3	Spanish	11,733.00	11,740.25	-1.5%	-2.8%	11%
4	Italian	12,643.80	11,361.00	-3.9%	-3.1%	11%
5	Chilean	12,711.58	10,557.00	-1.6%	-2.4%	10%
6	US	11,631.00	10,157.00	-5.6%	-2.9%	10%
7	South African	6,675.00	6,706.00	-5.2%	-2.0%	7%
8	New Zealand	6,375.00	5,966.00	-1.1%	2.0%	6%
9	Argentinian	5,591.90	5,172.00	5.6%	-0.5%	5%
10	German	2,148.00	1,884.00	-7.5%	-2.1%	2%

Source: IWSR

Still wine retail price by origin

The average retail prices of wine increased by 2.2% between 2017 and 2022, with wine from France, Spain, South Africa and the US experiencing the largest rises

Historic and forecast growth: Retail price

Five-year CAGR % calculated using a variable exchange rate

		Retail price per 0.75l 2022 (US$)	CAGR 17-22	CAGR F 22-27
	Total	10.09	2.2%	0.4%
1	Australian	8.64	0.7%	0.0%
2	French	15.04	3.4%	1.1%
3	Spanish	9.28	2.2%	0.0%
4	Italian	11.70	3.0%	0.8%
5	Chilean	8.72	1.3%	0.5%
6	US	8.69	2.5%	0.2%
7	South African	8.54	3.3%	0.3%
8	New Zealand	12.67	2.1%	0.0%
9	Argentinian	10.73	1.1%	0.3%
10	German	6.41	1.0%	-1.0%

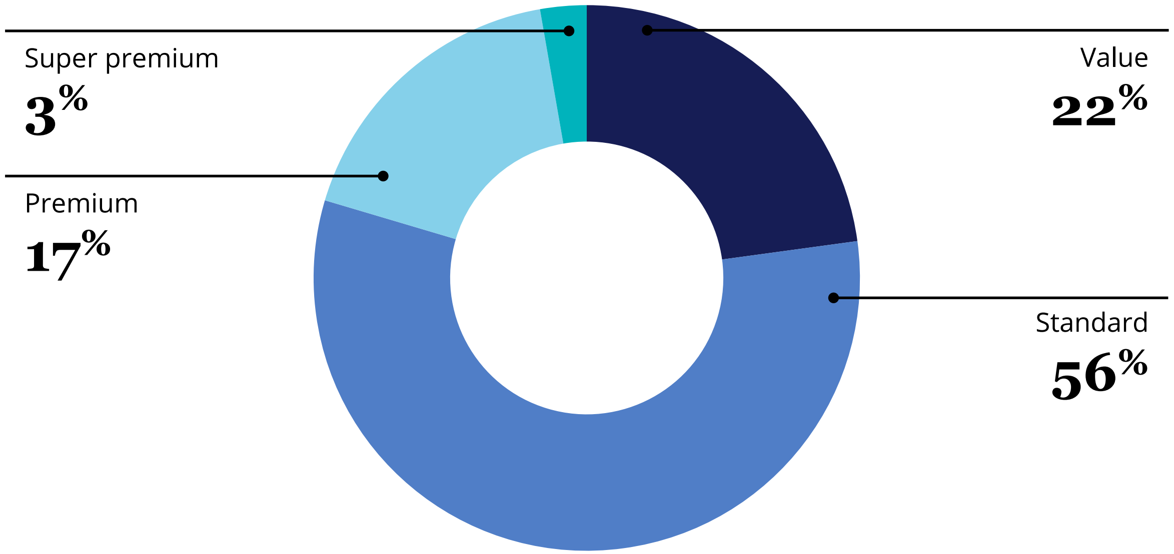
Source: IWSR

Still wine by price band

Wine sold at £5.99 or less experienced the largest contraction in volumes sold, while premium-and-above wine fared better; low-priced wine is forecasted to bounce back and have the largest growth over the next five years

Still wine by price band*

Percentage of purchases that fall within the categories below



Still wine by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Low-Price (under GBP 4.00)	821.00	820.50	-10.2%	4.4%
Value (between GBP 4.00 and 5.99)	25,663.70	23,197.33	-6.8%	-2.6%
Standard (between GBP 6.00 and 9.49)	62,450.52	57,647.94	0.0%	-2.8%
Premium (between GBP 9.50 and 16.49)	18,991.73	17,909.06	-2.0%	-0.5%
Super Premium (between GBP 16.50 and 33.99)	2,855.72	2,800.94	1.3%	0.9%
Ultra Premium (between GBP 34.00 and 51.99)	457.97	448.00	-1.0%	0.6%
Prestige (over GBP 52.00)	288.31	282.20	0.7%	0.7%

*Low-price, Ultra-premium and Prestige omitted from pie chart due to small market shares (less than 1%)

Source: IWSR

Still wine consumption per capita

Still wine drinkers in the UK are consuming less per capita than in previous years, with a large year-on-year fall; this trend is also seen in other European markets, including Italy and France

Per capita consumption of still wine

Litres per annum (LDA+ population)

		2021	2022	CAGR 17-22	CAGR 21-22
1	St. Martin and St. Maarten	46.67	49.01	12.3%	5.0%
2	Portugal	43.00	45.71	-0.9%	6.3%
3	Montenegro	41.76	42.62	-0.9%	2.0%
4	Italy	42.16	39.95	-2.8%	-5.2%
5	Slovenia	37.63	37.82	-2.8%	0.5%
6	St. Barths	33.89	37.21	9.3%	9.8%
7	Switzerland	36.14	34.94	-1.5%	-3.3%
8	France	35.71	33.93	-5.2%	-5.0%
9	Greece	27.95	33.79	0.5%	20.9%
10	Hungary	31.52	32.65	0.6%	3.6%
11	Denmark	33.37	30.99	-1.2%	-7.1%
12	Austria	30.93	30.12	-1.3%	-2.6%
13	Turks and Caicos	27.56	30.08	-2.9%	9.2%
14	Romania	27.55	27.87	2.4%	1.2%
15	US Virgin Islands	27.78	27.86	-2.6%	0.3%
34	United Kingdom	18.74	17.21	-3.2%	-8.2%

Source: IWSR

Sparkling wine volumes by origin

Sparkling wine grew between 2017 and 2022, but countries had differing fortunes. UK-produced sparkling wine experienced the largest growth and is expected to continue to perform more strongly than other origins

Total sparkling wine volumes and market share by origin

000s 9-litre cases

		2021	2022	CAGR 17-22	CAGR F 22-27
	Total	18,793.05	18,008.35	0.4%	-0.5%
1	Italian	13,026.60	12,266.50	0.5%	-0.5%
2	French	2,786.75	2,739.75	1.3%	0.1%
3	Spanish	1,786.80	1,771.25	-3.1%	-1.0%
4	United Kingdom	526.90	641.60	11.3%	2.1%
5	International	206.80	184.55	-0.9%	-6.6%
6	German	147.35	120.65	4.7%	-3.5%
7	Australian	130.00	107.00	-12.6%	1.4%
8	US	52.10	48.00	-9.9%	-8.0%
9	New Zealand	43.00	41.75	-1.9%	0.1%
10	Chilean	35.00	40.00	25.7%	4.1%

Source: IWSR

Sparkling wine retail price by origin

The average retail price per bottle of sparkling wine increased by 2.4% between 2017 and 2022, with sparkling wine from the UK having the largest increase of 14.7% over the past five years

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	15.64	2.4%	0.2%
1	Italian	11.15	1.2%	-0.1%
2	French	38.04	2.1%	-0.1%
3	Spanish	9.81	0.3%	-0.3%
4	United Kingdom	27.01	14.7%	0.6%
5	International	8.60	3.4%	-0.2%
6	German	5.79	0.2%	0.2%
7	Australian	11.75	-0.1%	-0.4%
8	US	11.24	2.6%	1.3%
9	New Zealand	16.98	2.0%	0.7%
10	Chilean	8.79	-4.8%	-0.1%

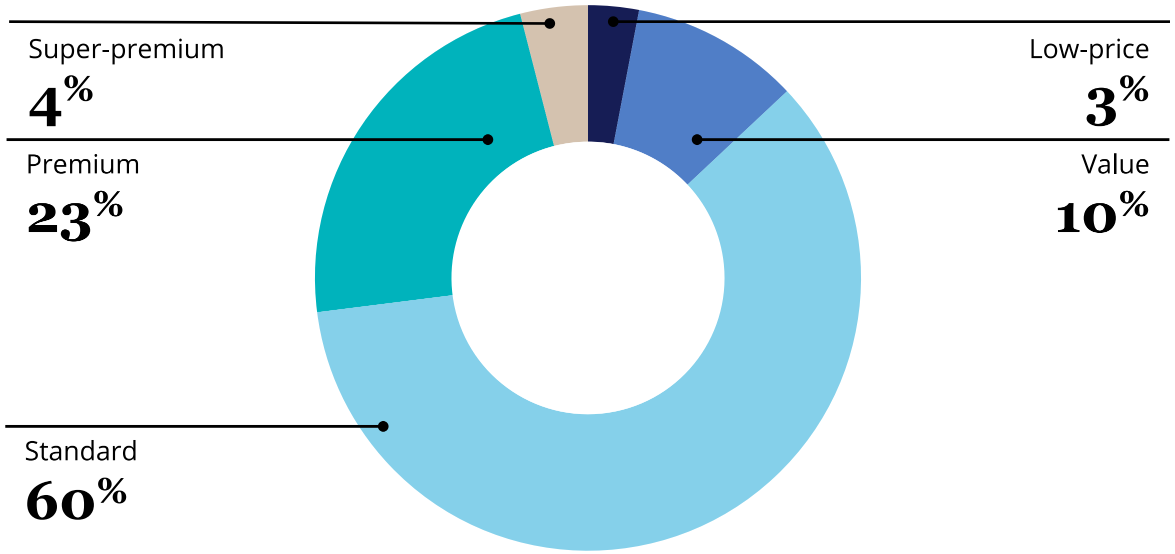
Source: IWSR

Other sparkling wine by price band

Most sparkling wine in the UK is sold between £6 and £9.49, although the largest volume growth has occurred at each end of the price spectrum

Other sparkling wine* by price brand**

Percentage of purchases that fall within the categories below



Other sparkling wine* volumes by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Low-Price (under GBP 4.00)	555.35	509.25	17.7%	5.7%
Value (between GBP 4.00 and 5.99)	1,641.20	1,526.55	-4.1%	0.1%
Standard (between GBP 6.00 and 9.49)	9,782.66	9,469.30	-0.5%	-1.0%
Premium (between GBP 9.50 and 16.49)	4,113.84	3,652.30	1.2%	-0.7%
Super Premium (between GBP 16.50 and 33.99)	446.50	585.85	20.9%	2.5%
Ultra Premium (over GBP 34.00)	66.00	104.60	31.4%	3.9%

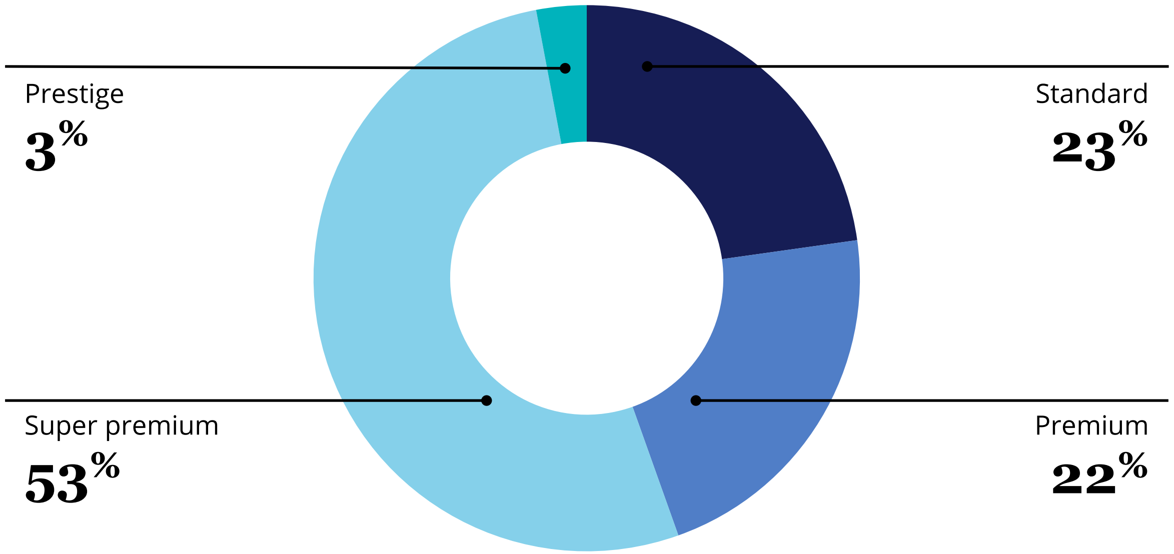
*Other sparkling wine includes all sparkling wine types except Champagne, and includes no/low sparkling wine types
**Ultra-premium omitted from pie chart due to small market share (less than 1%)
Source: IWSR

Champagne by price band

Champagne in the UK is typically sold in the super-premium segment, with the largest growth coming at prestige price points

Champagne by price brand*

Percentage of purchases that fall within the categories below



Champagne volumes by price band

000s 9-litre cases

	2021	2022	CAGR 17-22	CAGR F 22-27
Standard (under GBP 20.00)	495.00	485.50	-1.3%	-0.4%
Premium (between GBP 20.00 and 33.99)	506.75	472.00	-1.4%	-2.1%
Super Premium** (between GBP 34.00 and 119.99)	1,132.75	1,145.00	1.0%	-0.5%
Prestige (between GBP 120.00 and 274.99)	52.75	57.75	3.1%	3.0%
Prestige Plus (over GBP 275.00)	0.25	0.25	0.0%	0.0%

*Prestige Plus omitted from pie chart due to small market share (less than 1%)

**Super-premium price band includes ultra-premium

Source: IWSR

Sparkling wine consumption per capita

Per capita consumption of sparkling wine declined slightly between 2017 and 2022, with a sizeable decrease from 2021–22

Per capita consumption of sparkling wine

Litres per annum (LDA+ population)

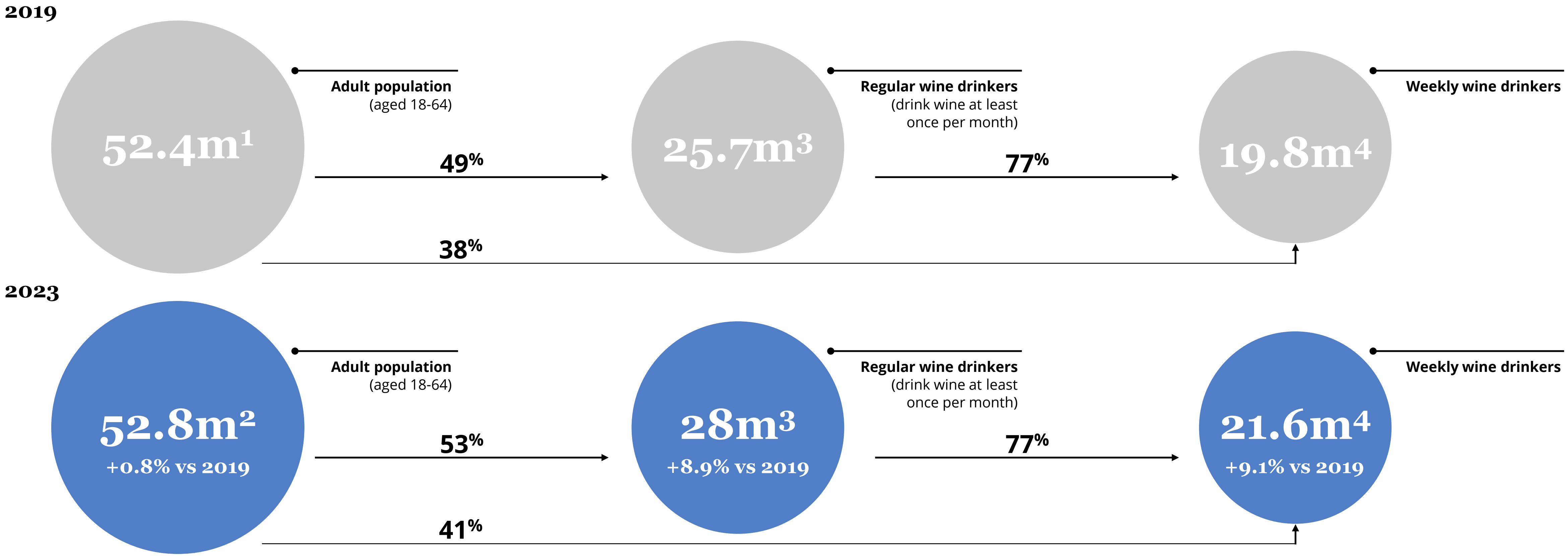
		2021	2022	CAGR 17-22	CAGR 21-22
1	St. Barths	12.47	13.58	13.1%	8.9%
2	St. Martin and St. Maarten	6.29	8.34	21.7%	32.6%
3	Italy	7.87	7.38	-1.2%	-6.2%
4	Turks and Caicos	5.27	6.50	-2.4%	23.4%
5	Germany	5.31	5.51	-1.9%	3.7%
6	Lithuania	4.88	5.06	7.3%	3.6%
7	Latvia	4.47	4.89	2.6%	9.4%
8	France	4.73	4.86	-1.3%	2.7%
9	Guadeloupe	4.17	4.81	-1.8%	15.5%
10	Martinique	4.22	4.43	-4.6%	4.8%
11	Estonia	4.08	4.34	4.0%	6.3%
12	Belgium and Luxembourg	4.28	4.27	-1.5%	-0.2%
13	Austria	3.44	3.54	0.3%	2.9%
14	Switzerland	3.23	3.33	0.9%	3.0%
15	Cayman Islands	3.13	3.31	2.1%	5.8%
17=	United Kingdom	3.16	3.01	-0.6%	-4.8%

Source: IWSR

Market Demographics

UK regular wine drinkers

The monthly and weekly wine-drinking populations have expanded since 2019, by 8.9% and 9.1% respectively



1 ONS, estimated population data
2 ONS, census data released in 2022, Scotland population estimates
3 IWSR online calibration studies, 2019 with Opinium (n=2,000), rolling average of 2022 and 2023 (n=9,707) UK adults,18+. Wine = still light wine (red, white, rosé)
4 Vinitrac® UK, March/July 2019 and October 2023 (n≥,2007) UK regular wine drinkers

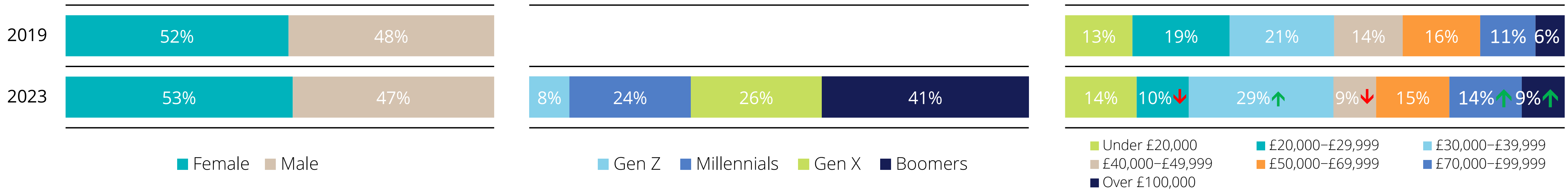
Demographics

The demographic make-up of regular wine drinkers in the UK is broadly consistent with previous years. There has been a significant increase in the proportion of higher earners since 2019

Q UK regular wine drinkers*, who are they?

All regular wine drinkers in the UK in 2023 compared with 2019 –

Gender **Generations**** **Income**



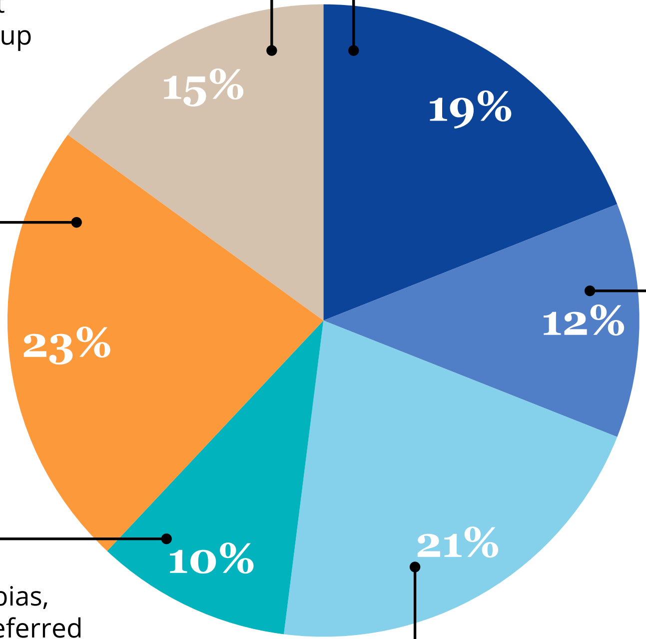
Regions (top 5)

	2019	2023	Tracking
South East + East Anglia	23%	26%	↑
North	21%	23%	→
Midlands	17%	16%	→
London	13%	13%	→
Scotland	9%	8%	→

Base: All UK regular wine drinkers (n≥2,007);
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® UK, March/July 2019 and October 2023 (n≥2,007), UK regular wine drinkers
*Definition of regular wine drinkers: Those respondents that drink wine once a month. **Tracking not available for generations due to change to question

UK Portraits: wine drinker segmentation

Senior Bargain Hunters account for the biggest share of UK regular wine drinkers in 2023, followed by Mature Treaters and Adventurous Explorers



KITCHEN CASUALS

The second oldest Portraits segment, Kitchen Casuals have a prominent presence of Gen X and Boomers from low-income households. This group is conservative in its approach to wine, with a tendency to avoid the on-trade. They enjoy drinking wine for pleasure but their engagement with the category remains relatively low. They are infrequent wine drinkers and have the narrowest alcohol repertoires and low levels of spending.

SENIOR BARGAIN HUNTERS

Senior Bargain Hunters tend to be women and are the oldest Portraits group, typically coming from households with moderate incomes. This group engages with wine less frequent when compared to other wine drinkers, typically consuming the beverage either once a weekly or monthly. They are the most price-conscious drinkers who exhibit lower involvement levels than other groups, often swayed by promotional offers when making purchase decisions.

SOCIAL NEWBIES

Social Newbies are a relatively young demographic with a strong male bias, centred in London and typically from low-income households. Their preferred setting for drinking wine is the on-trade, complemented by formal meal occasions and celebratory events in the off-trade. Their spending does not match other Portraits segments, but they value wine for perceptions of sophistication, individuality and fashionableness. They have the lowest knowledge base across the Portraits spectrum, although they feel competent about their knowledge of the category.

ADVENTUROUS EXPLORERS

As seasoned wine connoisseurs, Adventurous Explorers are typically aged 55 and over, and stand out as the most confident and knowledgeable of all the Portraits segments. Armed with a wealth of expertise, they adeptly navigate the wine landscape, identifying new and different styles of wine in their preferred lower price range. The pleasure they derive from the taste of wine serves both as a means of relaxation and as a complement to culinary experiences.

GENERATION TREATERS

Generation Treaters are comprised predominantly of Gen Z and Millennial wine drinkers, skewed strongly towards men, high incomes and London. They are the most engaged drinkers in the wine category and are the most willing to experiment with wine selections, reflecting high levels of confidence. They value wine for its role in elevating special occasions and creating a warm atmosphere, often with a partner, close friend or family member. As the most frequent consumers of wine in both off- and on-trade settings, they also have the highest typical spends in each.

MATURE TREATERS

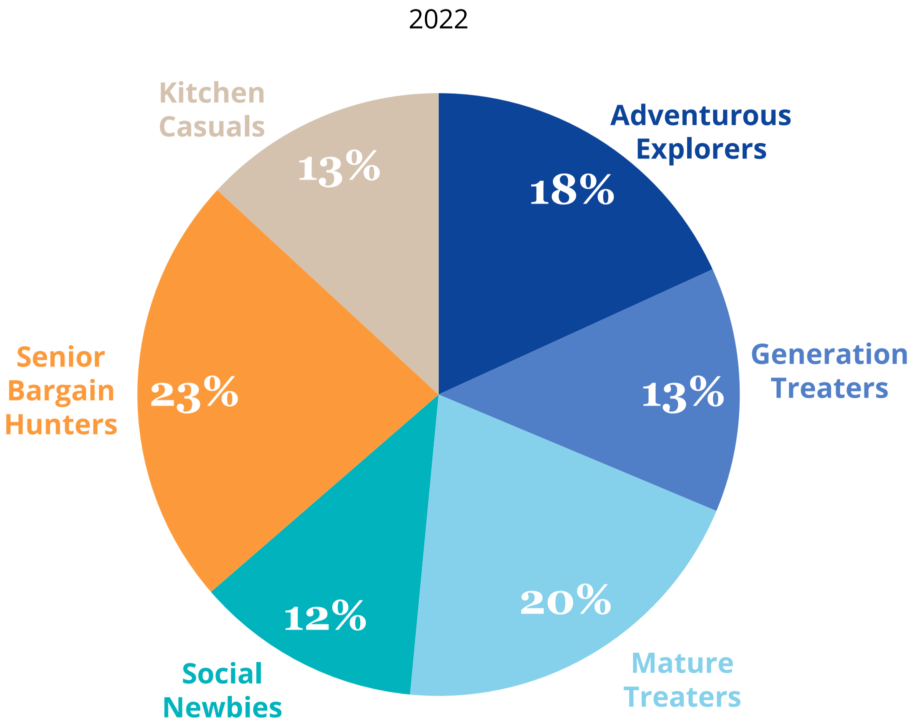
Mature Treaters have a strong female bias and a large proportion of over-55s from affluent households. They possess extensive knowledge of the wine category but lack the confidence seen in some other Portrait segments. Their wine purchasing predominantly occurs in the off-trade, and consumption often involves relaxed and informal meals. They have the second-highest average spend in both off- and on-trade settings, while seeking the best quality wines within their budget.

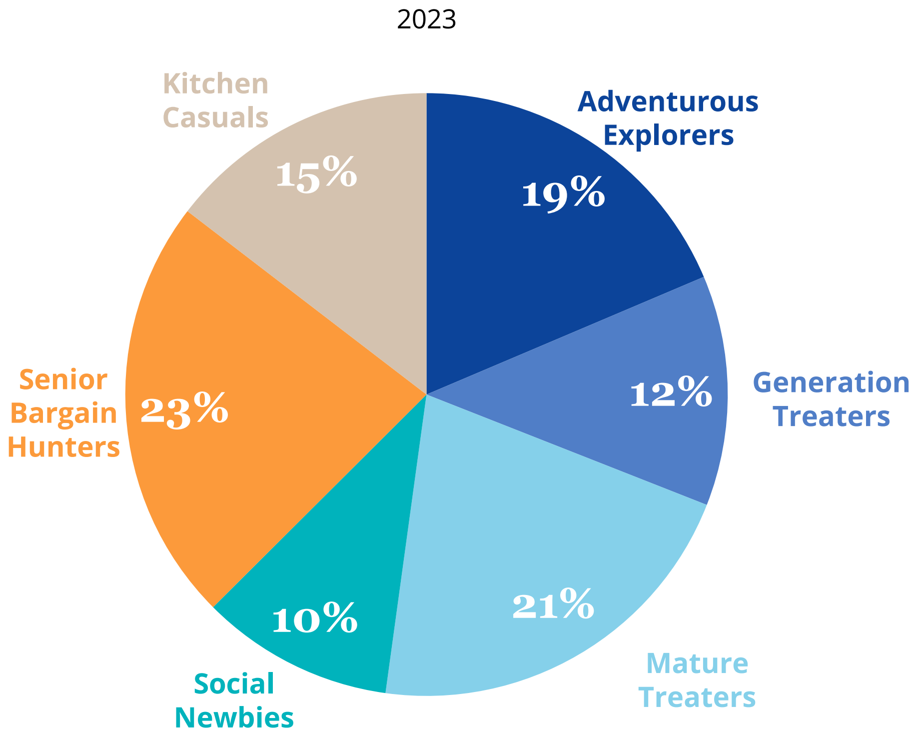
Source: IWSR, Vinitrac® UK, Oct '23 (n=2,007), UK regular wine drinkers

UK Portraits: wine drinker segmentation

The split between UK Portraits segments is broadly consistent with 2022, with Senior Bargain Hunters, Mature Treaters and Adventurous Explorers remaining the largest groups

Percentage share of population of UK regular wine drinkers by Portraits segments UK 2022 vs 2023

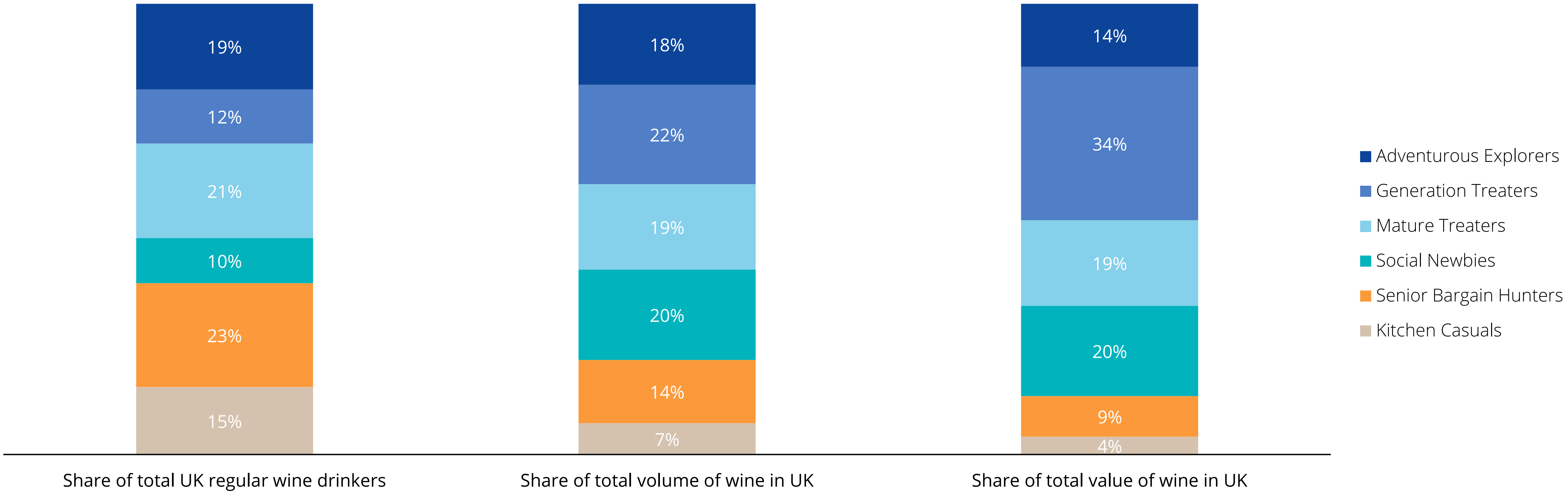




Base: All UK regular wine drinkers (n≥2,007)
↑/↓: Statistically significantly higher/lower than October/November 2022 at a 95% confidence level
Source: IWSR, Vinitrac® UK, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

UK Portraits market sizing

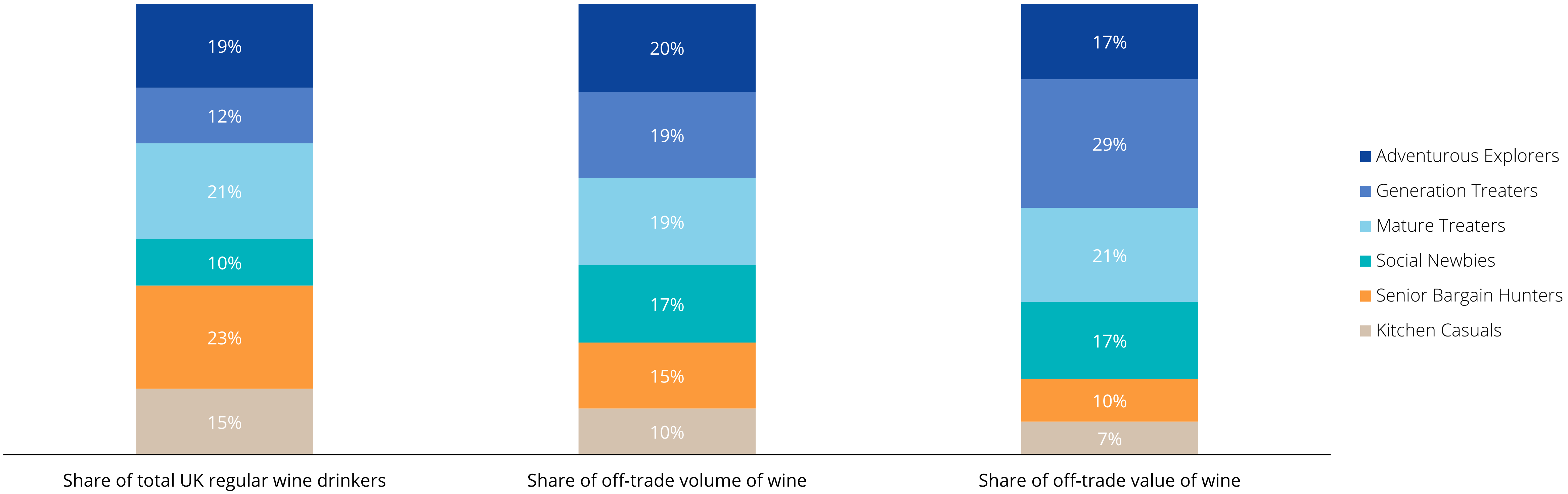
Generation Treaters are the most important Portraits segment in the UK market, accounting for a third of total wine value, despite only making up a tenth of the total share of the regular wine drinking population



Base: All UK regular wine drinkers (n=2,007)
Source: IWSR, Vinitrac® UK, October 2023 (n=2,007), UK regular wine drinkers

UK Portraits market sizing: off-trade

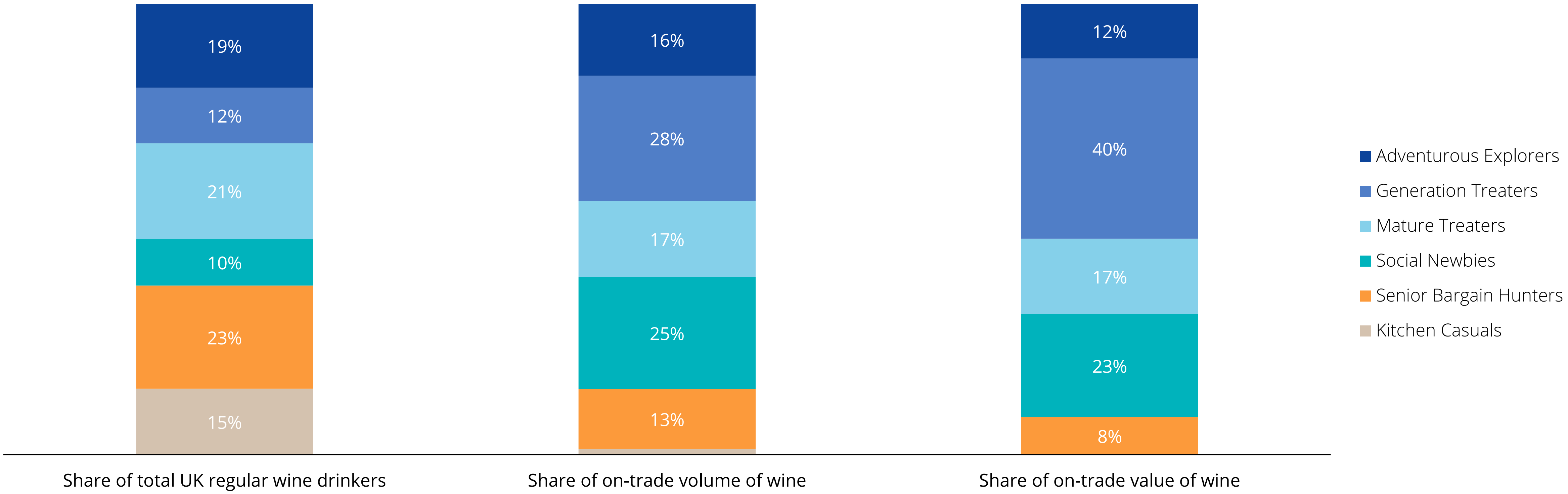
Generation Treaters and Social Newbies both over-index on share of off-trade wine value versus their share of the regular wine-drinking population



Base: All UK regular wine drinkers (n=2,007)
Source: IWSR, Vinitrac® UK, October 23 (n=2,007), UK regular wine drinkers

UK Portraits market sizing: on-trade

Generation Treaters are by far the most important Portraits segment in the on-trade, accounting for 40% of sales value



Base: All UK regular wine drinkers (n=2,007)
Source: IWSR, Vinitrac® UK, October 2023 (n=2,007), UK regular wine drinkers

Drinking Repertoire

Drinking repertoire

The alcohol repertoires of regular wine drinkers in the UK has shrunk slightly since 2019; more have consumed beer, cider, whisky, rum and RTDs in the past year, with rum and RTDs seeing longer-term growth

Alcoholic beverage repertoire: Top 15 tracking

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

Ranking '23		2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
1	White wine	81%	78%	77%	↓	→
2	Red wine	74%	72%	73%	→	→
3	Beer	64%	62%	65%	→	↑
4	Prosecco	60%	55%	54%	↓	→
5	Gin	50%	50%	50%	→	→
6	Rosé wine	50%	47%	46%	↓	→
7	Cider	43%	38%	41%	→	↑
8	Whisky / Whiskey	40%	35%	39%	→	↑
9	Vodka	39%	36%	38%	→	→
10	Cocktails	33%	34%	35%	→	→
11	Champagne (French Champagne)	38%	32%	33%	↓	→
12=	Rum	27%	27%	30%	↑	↑
12=	Craft beer	33%	29%	30%	↓	→
14	Liqueurs	27%	23%	25%	→	→
15=	Pre-mixed / ready to drink alcoholic beverages	17%	20%	22%	↑	↑

Base: All UK regular wine drinkers (n≥2,007); =Represents equal ranking

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

Source: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Varietal consumption (1/2)

UK regular wine drinkers are consuming a narrower range of varietals than in 2019; younger LDA+ consumers are driving the decline in the top varietals, while older consumers are less likely to drink more niche varietals

White varietal consumption: Tracking

Percentage who have drunk the following varietals or wine types in the past six months

Ranking '23		2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
1	Sauvignon Blanc	57%	56%	56%	→	→
2	Pinot Grigio / Pinot Gris	53%	49%	50%	↓	→
3	Chardonnay	51%	46%	45%	↓	→
4	Pinot Blanc	26%	24%	24%	→	→
5	Chenin Blanc	24%	21%	22%	↓	→
6	Riesling	18%	17%	15%	↓	→
7=	Moscato	11%	10%	11%	→	→
7=	Sémillon	14%	12%	11%	↓	→
7=	White blend	n/a	10%	11%	n/a	→
10	Viognier	10%	10%	9%	→	→
11	Albariño	6%	6%	7%	→	→
12=	Colombard	7%	7%	6%	→	→
12=	Verdejo	6%	6%	6%	→	→
12=	Torrontés	5%	5%	6%	→	→

Base: All UK regular wine drinkers (n≥2,007); =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: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Varietal consumption (2/2)

Malbec has bucked the trend of declining consumption of the leading red varietals among UK regular wine drinkers; Merlot remains the leading red varietal

Red varietal consumption: Tracking

Percentage who have drunk the following varietals or wine types in the past six months

Ranking '23		2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
1	Merlot	56%	50%	52%	↓	→
2=	Malbec	33%	39%	39%	↑	→
2=	Cabernet Sauvignon	44%	40%	39%	↓	→
4	Shiraz / Syrah	41%	37%	38%	↓	→
5	Pinot Noir	36%	31%	33%	↓	→
6	Tempranillo	19%	17%	18%	→	→
7	Zinfandel	16%	15%	15%	→	→
8	Pinotage	15%	13%	14%	→	→
9	Red blend	n/a	11%	13%	n/a	→
10	Grenache	13%	11%	11%	→	→
11	Sangiovese	9%	8%	8%	→	→
12=	Carménère	7%	7%	6%	→	→
12=	Gamay	6%	6%	6%	→	→

Base: All UK regular wine drinkers (n≥2,007); =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: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Ideal wine attributes

The ideal attributes of both white and red wine have remained stable year on year; 'fruity' and 'easy to drink' are among the top five attributes named by regular wine drinkers for both red and white wine

Ideal white wine attributes: Top 15

Percentage who select each description for their ideal white wine

Ranking '23		2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '22
1	Crisp	40%	44%	→
2	Easy to drink	41%	43%	→
3=	Fresh	40%	38%	→
3=	Fruity	36%	38%	→
5	Smooth	34%	35%	→
6	Dry	28%	29%	→
7	Light	27%	28%	→
8	Sweet	19%	22%	→
9	Delicate	16%	18%	→
10	Juicy	17%	17%	→
11=	Zesty	15%	16%	→
11=	Elegant	17%	16%	→
13	Soft	15%	15%	→
14	Full-bodied	17%	13%	↓
15	Simple	10%	11%	→

Ideal red wine attributes: Top 15

Percentage who select each description for their ideal red wine

Ranking '23		2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '22
1	Full-bodied	40%	43%	→
2	Smooth	40%	38%	→
3=	Fruity	32%	34%	→
3=	Rich	33%	34%	→
5	Easy to drink	31%	32%	→
6=	Bold	19%	20%	→
6=	Juicy	17%	20%	→
8=	Soft	17%	15%	→
8=	Elegant	13%	15%	→
10	Sweet	13%	14%	→
11=	Earthy	12%	13%	→
11=	Oaky	11%	13%	→
11=	Complex	13%	13%	→
14=	Spicy	13%	12%	→
14=	Jammy	10%	12%	→

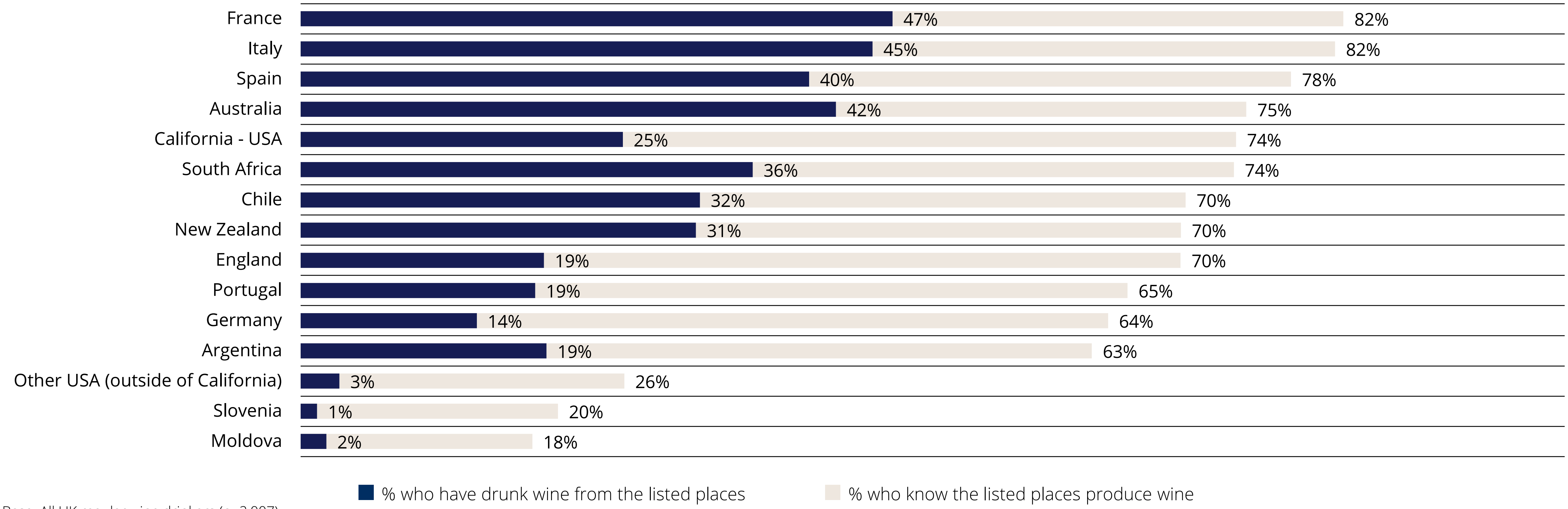
Base: All UK regular wine drinkers (n≥2,007); = represents equal ranking
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® UK, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Country of origin awareness and consumption

The gap between the leading countries of origin for both awareness and purchase among UK regular wine drinkers is narrow; France, Italy, Australia and Spain have the highest purchase rates

Country of origin: Top 15 awareness and consumption levels

Percentage of those who know of or have drunk wine from the following places



Base: All UK regular wine drinkers (n=2,007)
Source: IWSR, Vinitrac® UK, October 2023 (n=2,007), UK regular wine drinkers

Country of origin awareness

UK regular wine drinkers are aware of a narrower range of countries of origin than in 2019, with many bigger producing countries declining in awareness. Italy has increased in the short term to rank joint first with France

Country of origin awareness: Tracking

Percentage of those who know the following places produce wine

Ranking '23		2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
1=	France	84%	82%	82%	→	→
1=	Italy	82%	79%	82%	→	↑
3	Spain	82%	78%	78%	↓	→
4	Australia	78%	75%	75%	↓	→
5=	California - USA	76%	73%	74%	↓	→
5=	South Africa	77%	72%	74%	↓	→
7=	Chile	74%	69%	70%	↓	→
7=	New Zealand	71%	69%	70%	→	→
7=	England	72%	70%	70%	→	→
10	Portugal	66%	64%	65%	→	→
11	Germany	67%	63%	64%	→	→
12	Argentina	64%	63%	63%	→	→
13	Other USA (outside of California)	33%	27%	26%	↓	→
14	Slovenia	21%	20%	20%	→	→
15	Moldova	n/a	18%	18%	n/a	→

Base: All UK regular wine drinkers (n≥2,007); = 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: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Country of origin consumption

The proportion of UK regular wine drinkers consuming wine from Italy, Spain and South Africa has increased since 2022, to move back into line with pre-pandemic levels; France, Chile and California are yet to recover

Country of origin consumption: Tracking

Percentage of those who have drunk wine from the following places in the past six months

Ranking '23		2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
1	France	52%	47%	47%	↓	→
2	Italy	43%	40%	45%	→	↑
3	Australia	44%	42%	42%	→	→
4	Spain	39%	36%	40%	→	↑
5	South Africa	37%	32%	36%	→	↑
6	Chile	36%	30%	32%	↓	→
7	New Zealand	31%	30%	31%	→	→
8	California - USA	29%	25%	25%	↓	→
9=	Argentina	20%	19%	19%	→	→
9=	England	18%	20%	19%	→	→
9=	Portugal	16%	15%	19%	↑	↑
12	Germany	15%	13%	14%	→	→
13	Other USA (outside of California)	3%	3%	3%	→	→
14	Moldova	n/a	3%	2%	n/a	→
15	Slovenia	2%	2%	1%	→	→

Base: All UK regular wine drinkers (n≥2,007); = represents equal ranking; n/a = tracking unavailable for this wave

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

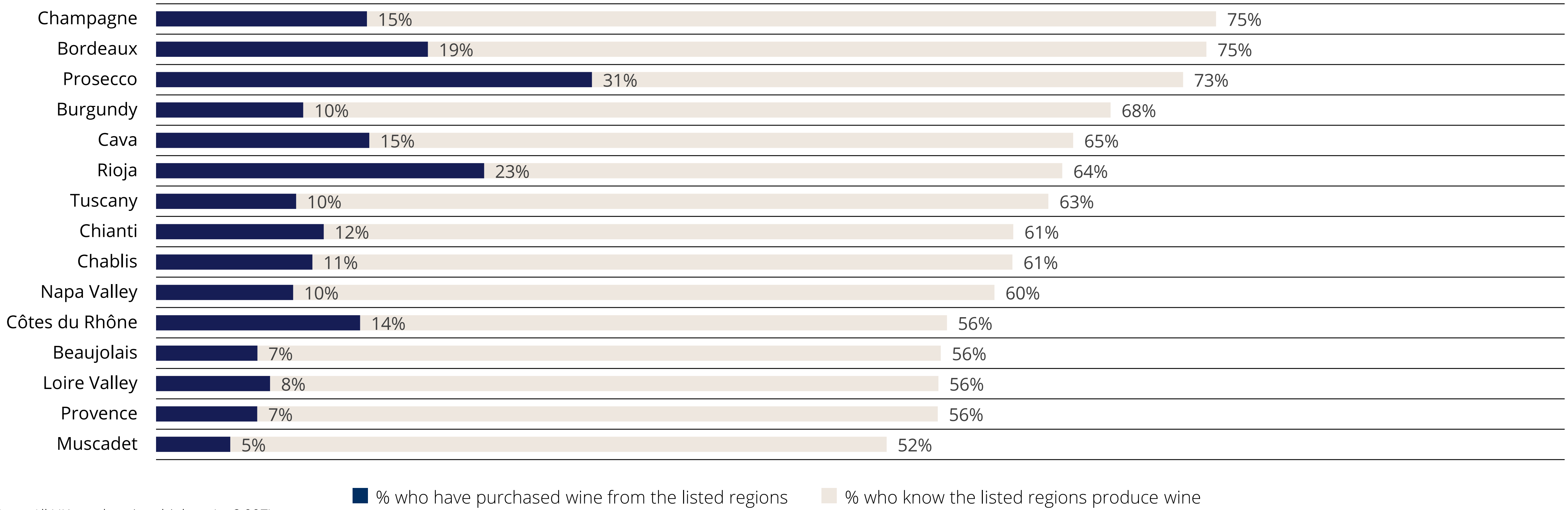
Source: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Region of origin awareness and purchase

Regular wine drinkers are most aware of Champagne and Bordeaux, but Prosecco and Rioja have the highest purchase rates among respondents

Region of origin: Top 15 awareness and purchase levels

Percentage of those who know of or have purchased wine from the following regions in the past three months



Base: All UK regular wine drinkers (n=2,007)
Source: IWSR, Vinitrac® UK, October 2023 (n=2,007), UK regular wine drinkers

Region of origin awareness

Awareness of many wine-producing regions has gone down since 2019, in line with a general trend of declining wine knowledge

Region of origin awareness: Tracking, top 15

Percentage of those who know the following places produce wine

Ranking '23		2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
1=	Champagne	80%	73%	75%	↓	→
1=	Bordeaux	80%	75%	75%	↓	→
3	Prosecco	77%	72%	73%	↓	→
4	Burgundy	73%	68%	68%	↓	→
5	Cava	70%	63%	65%	↓	→
6	Rioja	68%	63%	64%	↓	→
7	Tuscany	66%	62%	63%	→	→
8=	Chianti	65%	60%	61%	↓	→
8=	Chablis	65%	60%	61%	↓	→
10	Napa Valley	62%	57%	60%	→	→
11=	Côtes du Rhône	60%	57%	56%	↓	→
11=	Beaujolais	60%	56%	56%	↓	→
11=	Loire Valley	59%	55%	56%	↓	→
11=	Provence	55%	53%	56%	→	→
15	Muscadet	57%	53%	52%	↓	→

Base: All UK regular wine drinkers (n≥2,007); = represents equal ranking

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

Source: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Region of origin purchase

A significantly smaller proportion of regular wine drinkers are buying Prosecco than in 2019, but the region remains number one for purchases

Region of origin purchase: Tracking, top 15

Percentage of those who have bought wine from the following regions in the past three months

Ranking '23		2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
1	Prosecco	34%	31%	31%	↓	→
2	Rioja	25%	23%	23%	→	→
3	Bordeaux	20%	19%	19%	→	→
4=	Cava	16%	14%	15%	→	→
4=	Champagne	17%	15%	15%	→	→
6	Côtes du Rhône	14%	13%	14%	→	→
7	Marlborough	13%	12%	13%	→	→
8	Chianti	11%	11%	12%	→	→
9	Chablis	13%	10%	11%	→	→
10=	Hawke's Bay	9%	9%	10%	→	→
10=	Burgundy	12%	11%	10%	↓	→
10=	Tuscany	9%	9%	10%	→	→
10=	Napa Valley	10%	10%	10%	→	→
14	Sicily	7%	8%	9%	→	→
15	Loire Valley	6%	6%	8%	↑	↑

Base: All UK regular wine drinkers (n≥2,007); =Represents equal ranking

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

Source: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Wine-Buying Behaviors

Wine-buying channel usage

With the impact of the pandemic waning, regular wine drinkers have returned to using supermarkets in greater numbers; a significantly smaller proportion are using supermarket websites than last year

Wine-buying channel usage: Tracking

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

Ranking '23		2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
1	In a supermarket	84%	79%	83%	→	↑
2	In a discount store	37%	37%	38%	→	→
3	From a supermarket website	21%	28%	25%	↑	↓
4	In a corner / convenience shop	23%	23%	24%	→	→
5	In a wine shop / off licence chain	21%	19%	20%	→	→
6	From an online retailer	n/a	15%	14%	n/a	→
7	In an independent wine specialist store	13%	13%	13%	→	→
8	From Duty Free	11%	10%	11%	→	→
9	From a wine club or membership organisation	n/a	10%	10%	n/a	→
10	From a delivery app	n/a	7%	8%	n/a	→
11=	From a winery during a visit	n/a	6%	6%	n/a	→
11=	From a winery's website	n/a	7%	6%	n/a	→
13=	From the wine producer’s cellar	6%	6%	4%	↓	↓
13=	On cross-channel shopping trips	7%	6%	4%	↓	↓

Base: All UK regular wine drinkers (n≥2,007); = 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: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Wine-buying retailer usage

The proportion of regular wine drinkers purchasing wine from Tesco has increased significantly compared to both before the pandemic and 2022

Wine-buying retailer usage Top 15: Tracking

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

Ranking '23		2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
1	Tesco	44%	43%	47%	↑	↑
2	Sainsbury's	28%	28%	30%	→	→
3	Aldi	21%	22%	22%	→	→
4	Asda	22%	22%	21%	→	→
5	Lidl	16%	16%	16%	→	→
6	Morrisons	15%	14%	13%	↓	→
7	Marks & Spencer	11%	10%	11%	→	→
8	Waitrose	10%	10%	10%	→	→
9=	Majestic Wines	6%	8%	8%	↑	→
9=	Co-op	8%	9%	8%	→	→
11	Amazon	3%	7%	5%	↑	↓
12	Laithwaites	4%	4%	4%	→	→
13	Naked Wines	4%	4%	3%	→	→
14=	Virgin Wines	2%	3%	2%	→	→
14=	Bargain Booze	3%	3%	2%	↓	→

Base: Those who buy wine in the off-trade; = 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: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Consumption frequency

Frequency of wine consumption is consistent with pre-pandemic levels; a significantly higher proportion of Boomers than all UK regular wine drinkers consume wine daily

Wine consumption frequency: Tracking

Percentage who usually drink wine at the following frequency

	2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
Most days / every day	11%	11%	10%	→	→
2-5 times a week	36%	38%	37%	→	→
About once a week	30%	31%	30%	→	→
1-3 times a month	23%	20%	23%	→	↑

Wine consumption frequency: by generation

Percentage who usually drink wine at the following frequency

	All UK Regular Wine Drinkers (n=3,021)	LDA-26 Gen Z (n=165)	27-42 Millenials (n=491)	43-58 Gen X (n=522)	59+ Boomers (n=830)
Most days / every day	10%	4%	9%	8%	13%
2-5 times a week	37%	30%	37%	36%	40%
About once a week	30%	35%	30%	34%	25%
1-3 times a month	23%	30%	23%	22%	21%

Base: All UK regular wine drinkers (n≥2,007)

↑/↓: 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: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Off-trade consumption frequency

Consumption frequency across all off-trade occasions has remained stable since 2019

Off-trade: Wine consumption frequency by occasion

Those who buy wine in the off-trade; table below shows the number of days per month that consumers are drinking wine at these occasions

	2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
A relaxing drink at the end of the day at home	6.82	7.06	6.95	→	→
With an informal meal at home	5.81	5.98	6.14	→	→
With a more formal dinner party at home	1.61	1.72	1.61	→	→
At a party / celebration at home	1.47	1.69	1.55	→	→

Base: Those who buy wine in the off-trade

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

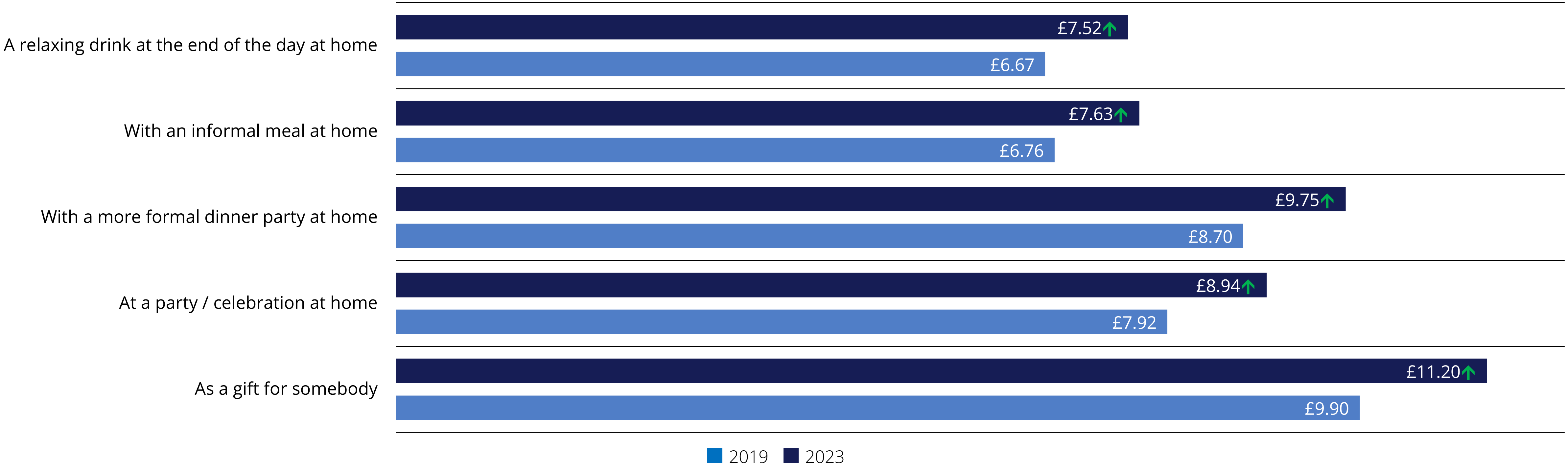
Source: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Off-trade spend

The amount typically spent on wine in the off-trade has increased significantly across all occasions; this is in part due to rising prices caused by inflation and duty increases

Off-trade: Typical spend per bottle by occasion

Those who buy wine in the off-trade



Base: Those who buy wine in the off-trade

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

Source: IWSR, Vinitrac® UK, March/July 2019 and October 2023 (n≥2,007), UK regular wine drinkers

On-trade purchase

A smaller proportion of UK regular wine drinkers than in 2019 are classified as on-trade drinkers, in line with consumer confidence data that shows respondents reporting that they are going out less

Wine purchase in on-trade

Percentage who buy wine in a bar, pub or restaurant

On-trade location		2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
Bar or pub	Yes	65%	67%	66%	→	→
	No	35%	33%	34%	→	→
Restaurant	Yes	87%	87%	85%	↓	↓
	No	13%	13%	15%	↑	↑
On-trade drinkers	Yes	90%	89%	88%	↓	→
	No	10%	11%	12%	↑	→

Wine purchase in on-trade: by generation

Percentage who buy wine in a bar, pub or restaurant

On-trade location		All UK Regular Wine Drinkers (n=3,021)	LDA-26 Gen Z (n=165)	27-42 Millennials (n=491)	43-58 Gen X (n=522)	59+ Boomers (n=830)
Bar or pub	Yes	66%	75%	76%	66%	59%
	No	34%	25%	24%	34%	41%
Restaurant	Yes	85%	90%	88%	81%	84%
	No	15%	10%	12%	19%	16%
On-trade drinkers	Yes	88%	93%	93%	84%	87%
	No	12%	7%	7%	16%	13%

Base: All UK regular wine drinkers (n≥2,007)
↑/↓: 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: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

On-trade consumption frequency

Those consuming wine in the on-trade are doing so less frequently than in the previous year, which means lower footfall for venues selling wine

On-trade: Wine consumption frequency by occasion

Those who buy wine in the on-trade

	2019	2022	2023	Tracking vs. '19	Tracking vs. '22
A relaxing drink out at the end of the day	3.41	3.55	3.11	→	↓
With an informal meal in a pub / bar / restaurant	2.05	1.92	1.78	↓	→
With a more formal dinner in a restaurant	1.57	1.73	1.48	→	↓
At a party / celebration / big night out	1.41	1.43	1.21	↓	↓

Market context

"Hospitality is still not back to its 2019 level: there may be more customers, but occasions and frequency are much reduced. Furthermore, younger drinkers were quicker to go out to pubs and bars, whereas older consumers took their time to return."

Executive Summary Report 2023, UK

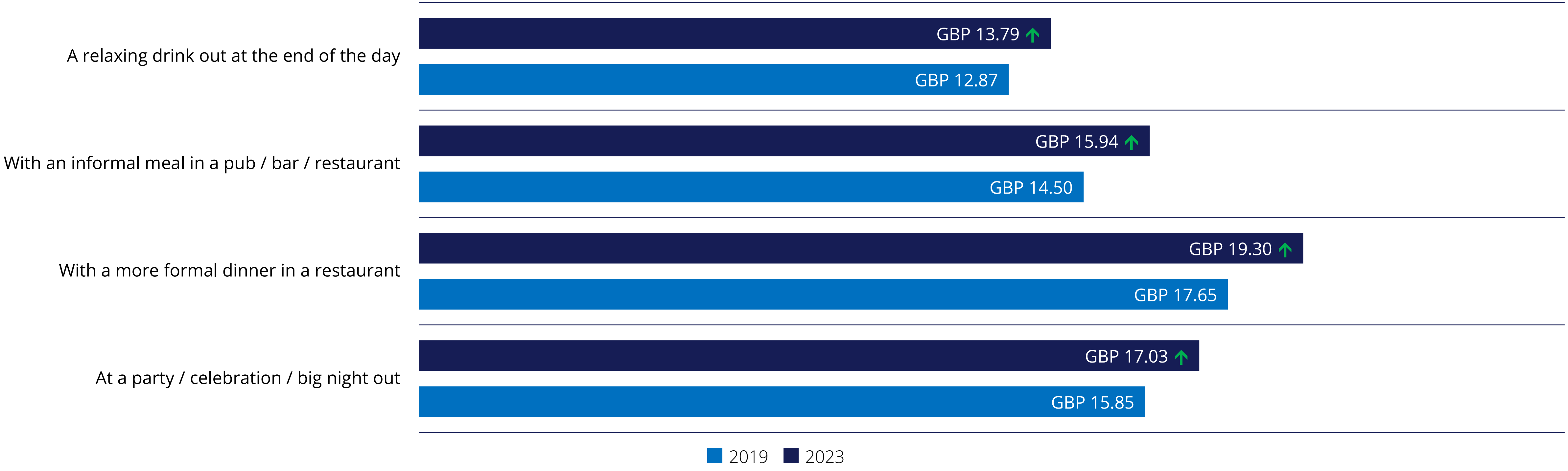
Base: Those who buy wine in the on-trade. Table shows the number of days per month that consumers are drinking wine at these occasions
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

On-trade spend

The amount being spent has increased significantly across all on-trade occasions compared to 2019, with inflation and duty increases playing a part, as they have in the off-trade

On-trade: Typical spend per occasion

Those who buy wine in the on-trade



Base: Those who buy wine in the on-trade
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® UK, March/July 2019 and October 2023 (n≥2,007), UK regular wine drinkers

Wine Views and Attitudes

Attitudes towards wine

Attitudes towards wine have remained stable compared to previous years; Gen Z and Millennials are most willing to experiment with wine selections

Attitudes towards wine: Tracking

Percentage who 'agree' or 'strongly agree' with the following statements

	2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
I enjoy trying new and different styles of wine on a regular basis	42%	44%	44%	→	→
I don't mind what I buy so long as the price is right	24%	24%	24%	→	→
I know what I like and I tend to stick to what I know	33%	32%	32%	→	→

Attitudes towards wine by generation

Percentage who 'agree' or 'strongly agree' with the following statements

	All UK Regular Wine Drinkers (n=3,021)	LDA-24 Gen Z (n=165)	25-39 Millenials (n=491)	40-54 Gen X (n=522)	55+ Boomers (n=830)
I enjoy trying new and different styles of wine on a regular basis	44%	55%	57%	48%	31%
I don't mind what I buy so long as the price is right	24%	30%	25%	25%	22%
I know what I like and I tend to stick to what I know	32%	15%	17%	26%	47%

Base: All UK regular wine drinkers (n≥2,007)

↑/↓: 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: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Wine involvement

The involvement levels of UK regular wine drinkers have increased significantly since 2019; Millennials tend to be the drinkers most involved with the category

Wine involvement: Tracking

	2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
High involvement	33%	37%	38%	↑	→
Medium involvement	39%	40%	39%	→	→
Low involvement	28%	23%	23%	↓	→

Wine involvement by generation

	All UK Regular Wine Drinkers (n=3,021)	LDA-26 Gen Z (n=165)	27-42 Millenials (n=491)	43-58 Gen X (n=522)	59+ Boomers (n=830)
High involvement	38%	45%	46%	42%	30%
Medium involvement	39%	32%	37%	38%	42%
Low involvement	23%	23%	18%	20%	28%

Base: All UK regular wine drinkers (n≥2,007)
↑/↓: 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: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Involvement and perceived expertise

UK regular wine drinkers are showing greater enthusiasm for the wine category than in previous years, with around half now saying they have a strong interest in wine and that it is important to their lifestyles

Involvement and perceived expertise in wine: Tracking

Percentage who ‘agree’ or ‘strongly agree’ with the following statements

Ranking '23		2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
1	Drinking wine gives me pleasure	85%	88%	88%	↑	→
2	I always look for the best quality wines I can get for my budget	77%	79%	79%	→	→
3	Deciding which wine to buy is an important decision	63%	68%	67%	↑	→
4	Generally speaking, wine is reasonably priced	60%	61%	61%	→	→
5	I like to take my time when I purchase a bottle of wine	58%	60%	58%	→	→
6	Wine is important to me in my lifestyle	44%	52%	52%	↑	→
7	I have a strong interest in wine	45%	47%	48%	↑	→
8	I feel competent about my knowledge of wine	42%	45%	44%	→	→
9=	Compared to others, I know less about the subject of wine	35%	36%	35%	→	→
9=	Generally speaking, wine is an expensive drink	35%	37%	35%	→	→
11	I don’t understand much about wine	29%	30%	26%	→	↓

Base: All UK regular wine drinkers (n≥2,007)
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Involvement and perceived expertise

Significantly more Gen Zs and Millennials than the total sample have a strong interest in wine; Millennials and Gen X perceive wine as important to their lifestyles; Boomers mainly drink wine for pleasure

Involvement and perceived expertise in wine by generation

Percentage who 'agree' or 'strongly agree' with the following statements

Ranking '23		All UK Regular Wine Drinkers (n=3,021)	LDA-26 Gen Z (n=165)	27-42 Millennials (n=491)	43-58 Gen X (n=522)	59+ Boomers (n=830)
1	Drinking wine gives me pleasure	88%	73%	86%	89%	91%
2	I always look for the best quality wines I can get for my budget	79%	78%	78%	80%	79%
3	Deciding which wine to buy is an important decision	67%	69%	71%	65%	64%
4	Generally speaking, wine is reasonably priced	61%	62%	67%	64%	55%
5	I like to take my time when I purchase a bottle of wine	58%	65%	68%	58%	50%
6	Wine is important to me in my lifestyle	52%	56%	61%	58%	43%
7	I have a strong interest in wine	48%	62%	56%	49%	39%
8	I feel competent about my knowledge of wine	44%	47%	55%	45%	37%
9=	Compared to others, I know less about the subject of wine	35%	50%	46%	30%	30%
9=	Generally speaking, wine is an expensive drink	35%	50%	48%	32%	26%
11	I don't understand much about wine	26%	31%	30%	26%	24%

Base: All UK regular wine drinkers (n=2,007)

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

Source: IWSR, Vinitrac® UK, October 2023 (n=2,007), UK regular wine drinkers

Wine knowledge and confidence indices

Knowledge levels of regular wine drinkers have increased significantly since 2022, which could be due to some less involved drinkers leaving the category; knowledge is still significantly lower than in 2019

Wine knowledge index: Tracking[1]

Wine knowledge index is the 'objective' measurement of consumer knowledge about wine

	2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
Knowledge Index	41.6	37.9	39.1	↓	↑

Wine confidence index: Tracking[2]

Wine confidence index is the 'subjective' measurement of consumer confidence about their wine knowledge

	2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
Confidence Index	52.7	53.4	54.3	↑	→

[1]Wine knowledge index (0–100) is calculated based on consumer-reported awareness of wine-growing regions and wine brands.
[2]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.
Base: All UK regular wine drinkers (n≥2,007); ↑/↓: Statistically significantly higher / lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Wine-drinking motivations

Motivations for drinking wine are broadly the same as in 2022, although there has been an increase in the proportion using wine to celebrate special occasions

Wine drinking motivations: Tracking

Percentage who 'agree' or 'strongly agree' with the following statements

Ranking '23		2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '22
1	I really love the taste of wine	56%	58%	→
2=	Drinking wine makes me feel relaxed	55%	56%	→
2=	Wine enhances food and meals	55%	56%	→
4	To celebrate special occasions	49%	52%	↑
5	Wine is about sharing with a partner / close friend or family member	43%	42%	→
6	Wine helps create a warm / friendly atmosphere	39%	39%	→
7	Wine is about sharing something with others	36%	36%	→
8	I treat myself with wine at the end of the day	33%	31%	→
9	Wine is a refreshing drink	31%	29%	→
10	I like shopping / choosing wines to drink	23%	23%	→
11=	Most of my friends drink wine	22%	21%	→
11=	Drinking wine can be good for my health	20%	21%	→
11=	I like learning about new wines	21%	21%	→
14	Wine is a fashionable drink	15%	15%	→
15=	It makes me feel individual and unique	9%	9%	→
15=	It makes people sophisticated	11%	9%	↓

Base: All UK regular wine drinkers (n≥2,007); = Represents equal ranking
%/%: Statistically significantly higher/lower than all regular wine drinkers at a 95% confidence level
Source: IWSR, Vinitrac® UK, October/November 2022, October 2023 (n≥2,007), UK regular wine drinkers

Wine-drinking motivations

Gen Z and Millennial drinkers value wine for its image-related properties more than regular wine drinkers in general, while Boomers are more motivated to drink wine because of its taste and food pairing ability

Wine drinking motivations by generation

Percentage who 'agree' or 'strongly agree' with the following statements

Ranking '23		All UK Regular Wine Drinkers (n=3,021)	LDA-26 Gen Z (n=165)	27-42 Millennials (n=491)	43-58 Gen X (n=522)	59+ Boomers (n=830)
1	I really love the taste of wine	58%	42%	51%	61%	63%
2=	Drinking wine makes me feel relaxed	56%	51%	53%	61%	56%
2=	Wine enhances food and meals	56%	43%	43%	54%	66%
4	To celebrate special occasions	52%	56%	52%	51%	53%
5	Wine is about sharing with a partner / close friend or family member	42%	36%	38%	40%	47%
6	Wine helps create a warm / friendly atmosphere	39%	38%	37%	38%	41%
7	Wine is about sharing something with others	36%	36%	33%	31%	40%
8	I treat myself with wine at the end of the day	31%	35%	33%	35%	28%
9	Wine is a refreshing drink	29%	33%	30%	27%	29%
10	I like shopping / choosing wines to drink	23%	22%	25%	24%	21%
11=	Most of my friends drink wine	21%	26%	23%	19%	21%
11=	Drinking wine can be good for my health	21%	17%	24%	20%	21%
11=	I like learning about new wines	21%	24%	23%	21%	18%
14	Wine is a fashionable drink	15%	29%	21%	13%	10%
15=	It makes me feel individual and unique	9%	20%	17%	9%	3%
15=	It makes people sophisticated	9%	25%	16%	7%	3%

Base: All UK regular wine drinkers (n=2,007); = Represents equal ranking

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

Source: IWSR, Vinitrac® UK, October 2023 (n=2,007), UK regular wine drinkers

Wine-buying choice cues

UK regular wine drinkers have a wider range of choice cues they use to make purchase decisions than in 2019, which highlights the arrival of new drinkers who have entered the category in that time

Wine choice cues: Tracking

Percentage who indicate each of the following factors is 'important' or 'very important' when buying wine

Ranking '23		2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
1	Grape variety	73%	76%	77%	↑	→
2	The country of origin	62%	64%	65%	↑	→
3=	Taste or wine style descriptions displayed on the shelves or on wine labels	64%	66%	64%	→	→
3=	A brand I am aware of	58%	62%	64%	↑	→
5	Promotional offer	57%	62%	63%	↑	→
6	Wine that matches or complements food	58%	61%	60%	→	→
7	The region of origin	56%	59%	59%	↑	→
8	Alcohol content	49%	53%	56%	↑	→
9	Recommendation by friend or family	53%	56%	55%	→	→
10	Appeal of the bottle and / or label design	37%	38%	41%	↑	↑
11	Recommendations from shop staff or shop leaflets	30%	34%	30%	→	↓
12	Recommendation by wine critic or writer	27%	31%	29%	→	→
13	Whether or not the wine has won a medal or award	26%	28%	27%	→	→
14	Recommendation by wine guide books	23%	27%	26%	↑	→

Base: All UK regular wine drinkers (n≥2,007); = Represents equal ranking
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Market context

"The share of wine sold on promotion has increased, with retailers using wine to drive footfall and 'six bottles at 25% off' deals running right up to Christmas, unlike in previous years."

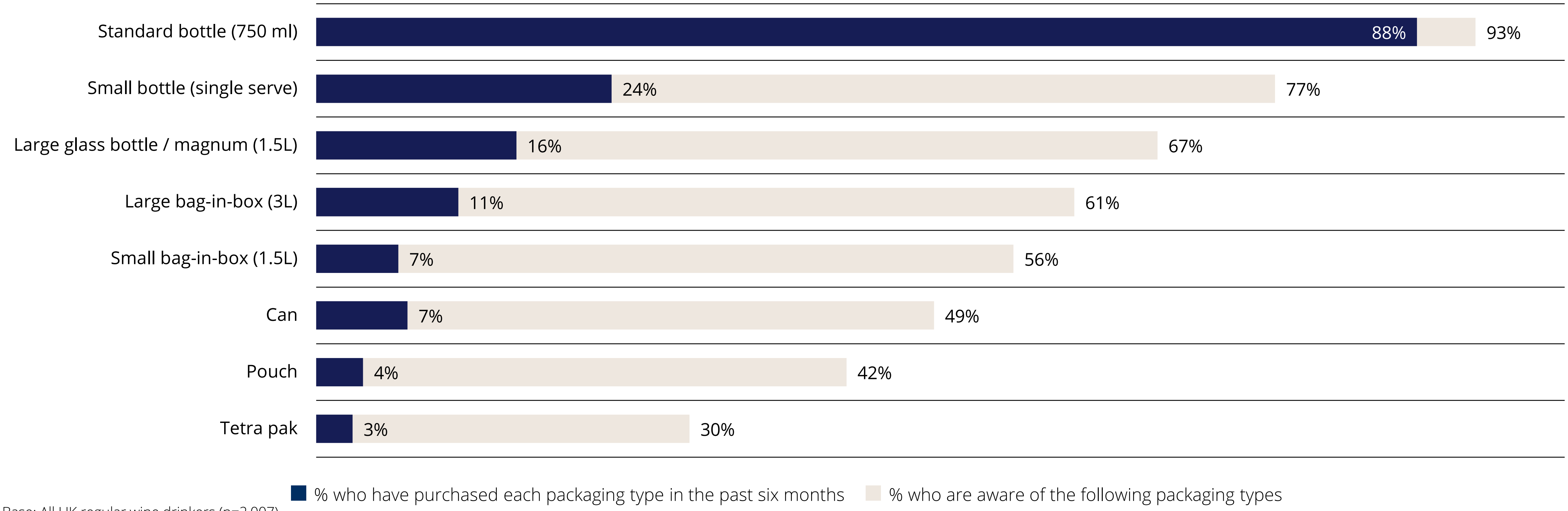
Executive Summary Report 2023, UK

Packaging type awareness and purchase

Standard 75cl bottles are still the most popular packaging format among regular wine drinkers in the UK, while a quarter of respondents have purchased wine in small bottles in the past six months

Packaging types: Awareness and purchase levels

Percentage of those who are aware of or have purchased wine in the following packaging types



Base: All UK regular wine drinkers (n=2,007)
Source: IWSR, Vinitrac® UK, October 2023 (n=2,007), UK regular wine drinkers

Packaging purchase

Regular wine drinkers' packaging purchase incidences are in line with 2022; Gen Z and Millennials are more likely than wine drinkers in general to buy small bottles and magnums

Packaging purchase: Tracking

Percentage who have purchased wine in the following packaging types

Ranking '23		2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '22
1	Standard bottle (750 ml)	87%	88%	→
2	Small bottle (single serve)	22%	24%	→
3	Large glass bottle / magnum (1.5L)	16%	16%	→
4	Large bag-in-box (3L)	10%	11%	→
5=	Can	6%	7%	→
5=	Small bag-in-box (1.5L)	6%	7%	→
7	Pouch	4%	4%	→
8	Tetra pak	3%	3%	→

Packaging purchase: by generation

Percentage who have purchased wine in the following packaging types

Ranking '23		All UK Regular Wine Drinkers (n=3,021)	LDA-26 Gen Z (n=165)	27-42 Millennials (n=491)	43-58 Gen X (n=522)	59+ Boomers (n=830)
1	Standard bottle (750 ml)	88%	76%	80%	91%	93%
2	Small bottle (single serve)	24%	34%	30%	21%	20%
3	Large glass bottle / magnum (1.5L)	16%	39%	25%	15%	7%
4	Large bag-in-box (3L)	11%	12%	12%	14%	9%
5=	Can	7%	9%	15%	7%	3%
5=	Small bag-in-box (1.5L)	7%	9%	8%	7%	5%
7	Pouch	4%	7%	6%	4%	2%
8	Tetra pak	3%	5%	5%	2%	2%

Market context

"Smaller pack formats – such as 187ml bottles or cans – are increasing in popularity, as consumers look to rein in spending and/or moderate their consumption."

Executive Summary Report 2023, UK

Base: All UK regular wine drinkers (n=2,007); = Represents equal ranking
↑/↓: 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: IWSR, Vinitrac® UK, October/November 2022, October 2023 (n≥2,007), UK regular wine drinkers

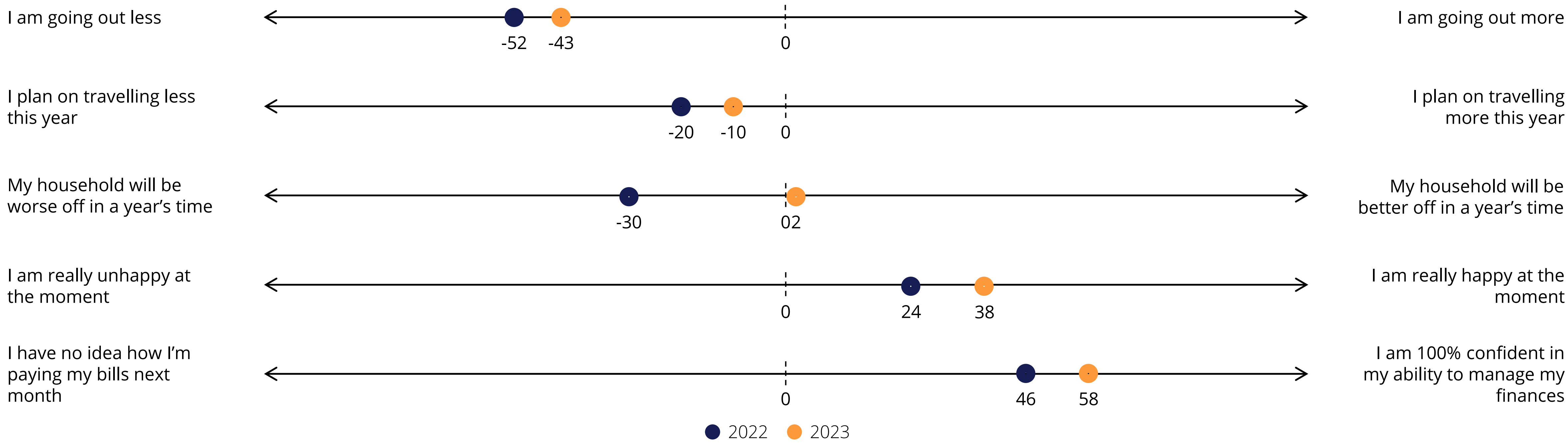
Hot Topic: Consumer Sentiment

Consumer sentiment

There has been a sizeable swing in confidence among UK regular wine drinkers since 2022, with a majority now saying their household will be better off a year from now; attitudes to going out remain mainly negative

Consumer sentiment: general well-being, travel and socialising, tracked

Net score of percentage who agree with leftmost statement subtracted from the percentage who agree with the rightmost statement



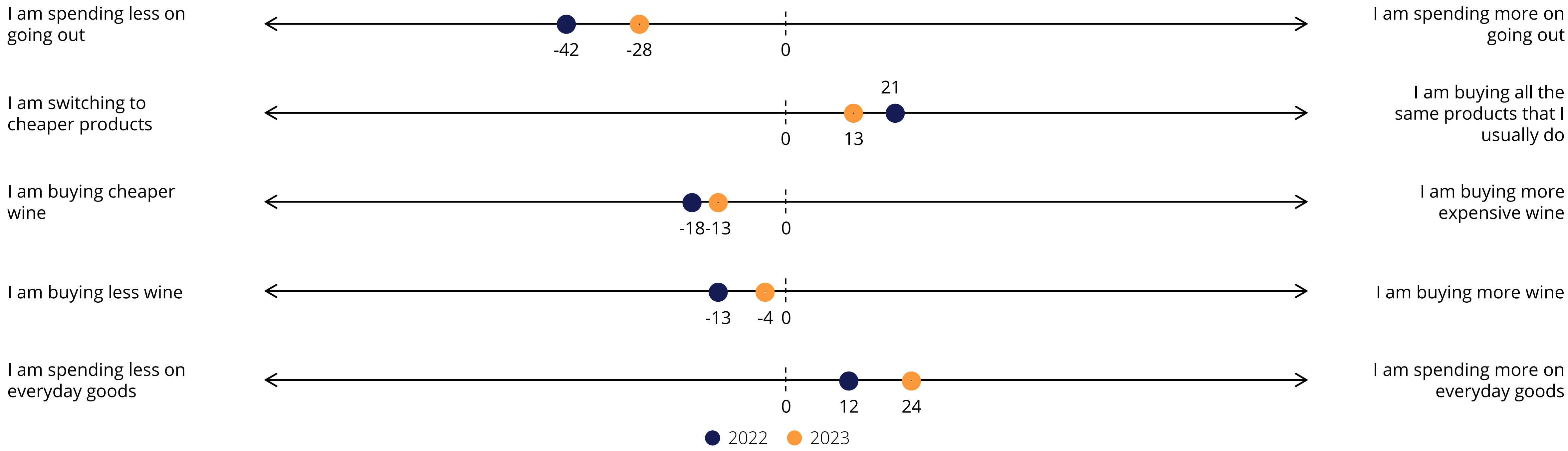
Base: All UK regular wine drinkers (n=2,007)
Source: IWSR, Vinitrac® UK, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Consumer sentiment

Most regular wine drinkers are buying the same products generally as before, while reporting down-trading in the wine category, though spending is bouncing back slightly

Consumer sentiment: spending and wine, tracked

Net score of percentage who agree with leftmost statement subtracted from the percentage who agree with the rightmost statement



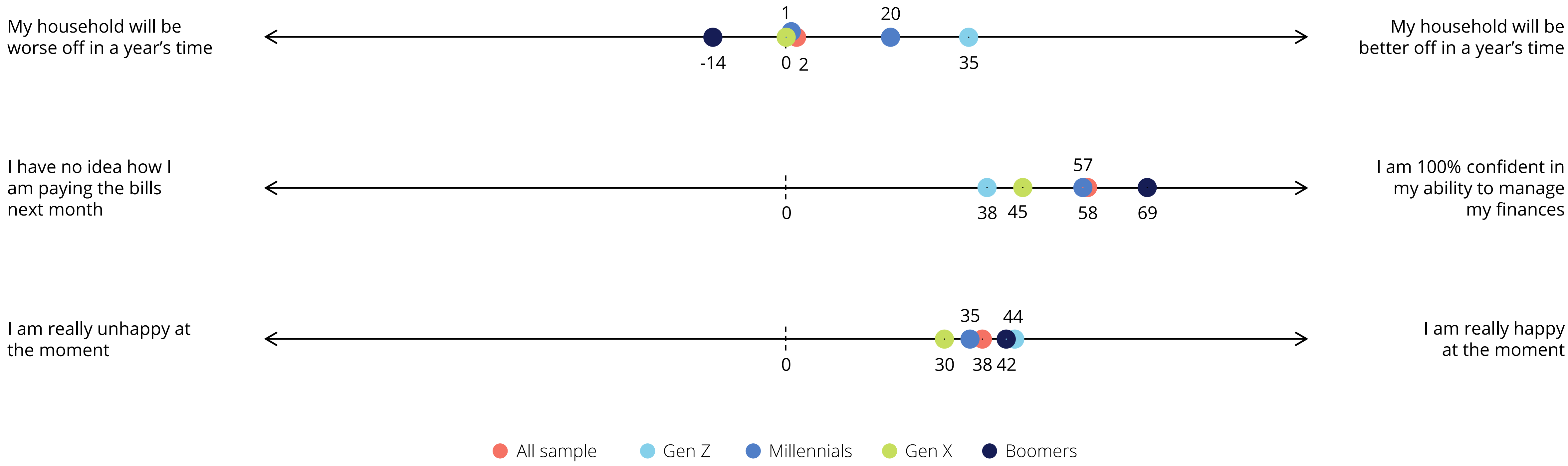
Base: All UK regular wine drinkers (n=2,007)
Source: IWSR, Vinitrac® UK, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Consumer sentiment

All age groups are generally happy, content with their economic situation and have positive expectations of the future, except for concern among Boomers about how well-off their households will be in a year's time

Consumer sentiment: general well-being

Net score of percentage who agree with leftmost statement subtracted from the percentage who agree with the rightmost statement



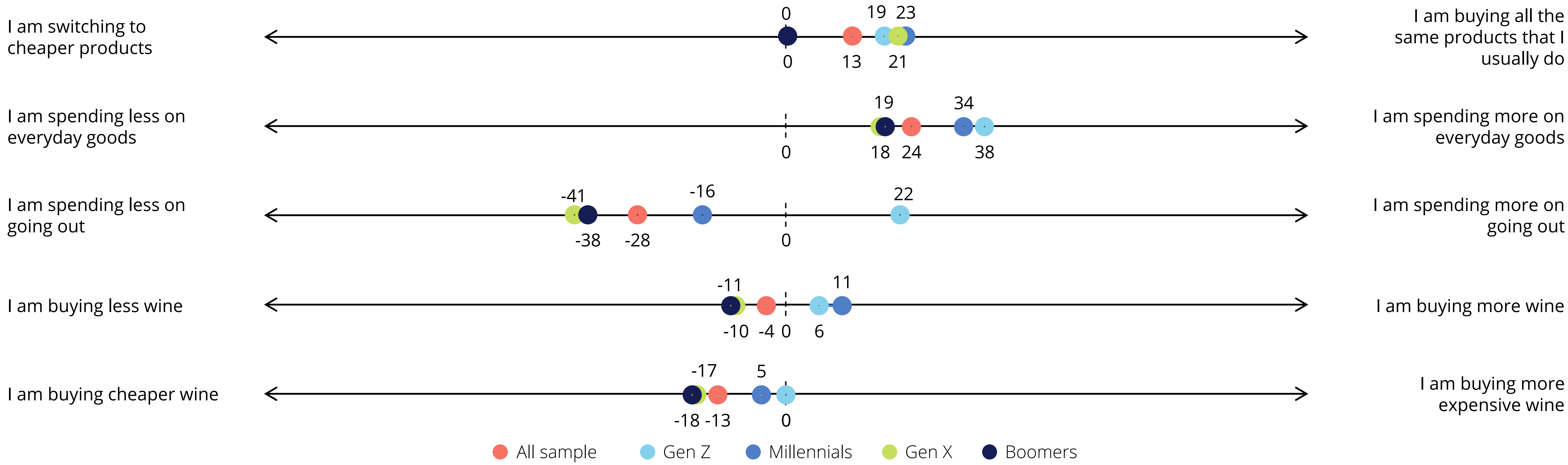
Base: All UK regular wine drinkers (n=2,007)
Source: IWSR, Vinitrac® UK, October 2023 (n=2,007), UK regular wine drinkers

Consumer sentiment

There is a generational divide over purchasing wine, with a majority of Gen Z and Millennials saying they are buying more, while Gen X and Boomers are buying less

Consumer sentiment: spending and wine

Net score of percentage who agree with leftmost statement subtracted from the percentage who agree with the rightmost statement



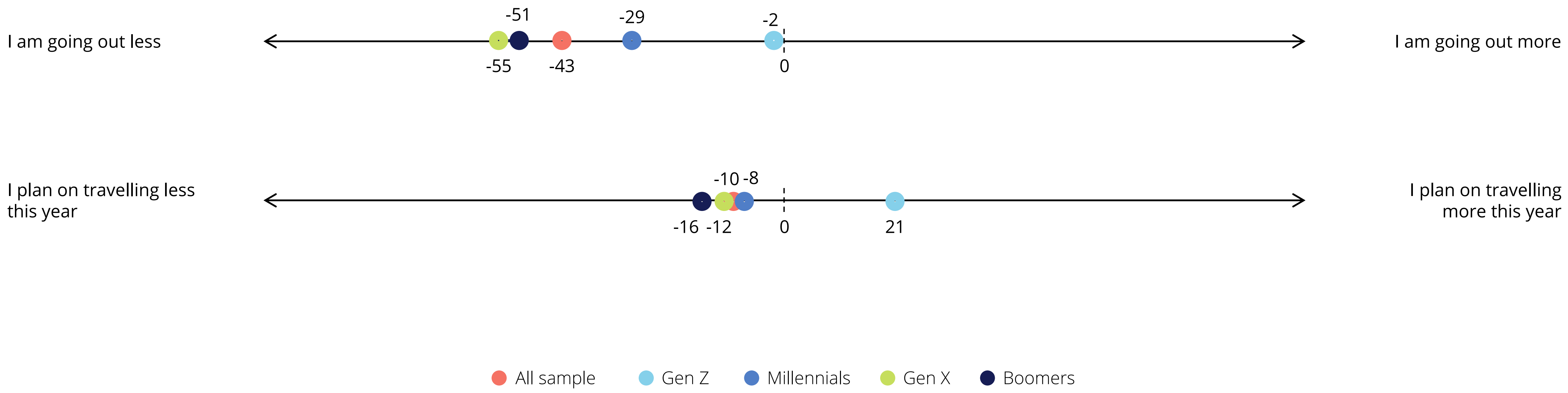
Base: All UK regular wine drinkers (n=2,007)
Source: IWSR, Vinitrac® UK, October 2023 (n=2,007), UK regular wine drinkers

Consumer sentiment

All age groups say they are going out less, although this is much less pronounced among Gen Z

Consumer sentiment: travel and socialising

Net score of percentage who agree with leftmost statement subtracted from the percentage who agree with the rightmost statement

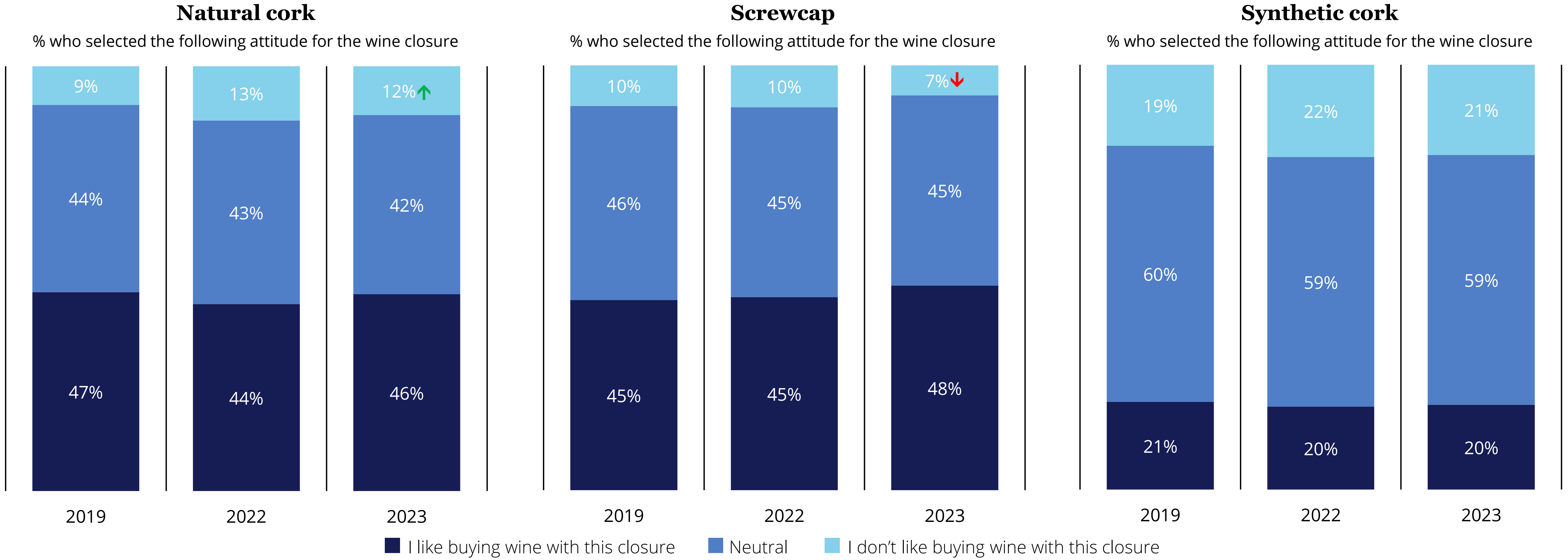


Base: All UK regular wine drinkers (n=2,007)
Source: IWSR, Vinitrac® UK, October 2023 (n=2,007), UK regular wine drinkers

Hot Topic: Wine Closures

Wine closures

UK RWDs' perception of wine closure has broadly remained unchanged since 2019, although there has been a swing towards those who do not like buying wine with a natural cork closure



Base: All UK regular wine drinkers (n≥2,007); = Represents equal ranking

↑/↓: Statistically significantly higher/lower than the March/July 2019 wave at a 95% confidence level

Source: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Views on wine closure types

Natural cork has a close association with being “high quality”, “trustworthy” and for “good for special occasions” while screw-caps are viewed as being “practical” and for “good for everyday drinking”

Wine closure types imagery

% who associate the following statements with each type of wine closure

	Natural cork (n=1,001)	Screw-cap (n=1,001)	Synthetic cork (n=1,001)
Practical	11%	57%	17%
Good for everyday drinking	16%	53%	19%
Good for special occasions	43%	12%	12%
Opening a wine with this type of closure gives me pleasure	38%	16%	9%
High quality	47%	13%	11%
Trustworthy	34%	28%	17%
Low quality	2%	17%	18%
Cheap	5%	30%	20%
Affordable	15%	43%	23%
Sustainable	25%	26%	16%
Recyclable	28%	39%	20%
Traditional	61%	7%	6%
Modern	7%	46%	31%
Innovative	8%	19%	22%
Outdated	22%	5%	10%

Base: All UK regular wine drinkers (n=2,007); Green/turquoise: Statistically significantly higher than 2/1 wine closure types at a 95% confidence level
Source: IWSR, Vinitrac® UK, October 2023 (n=2,007), UK regular wine drinkers

Brand Health

Global Wine Brand Power Index

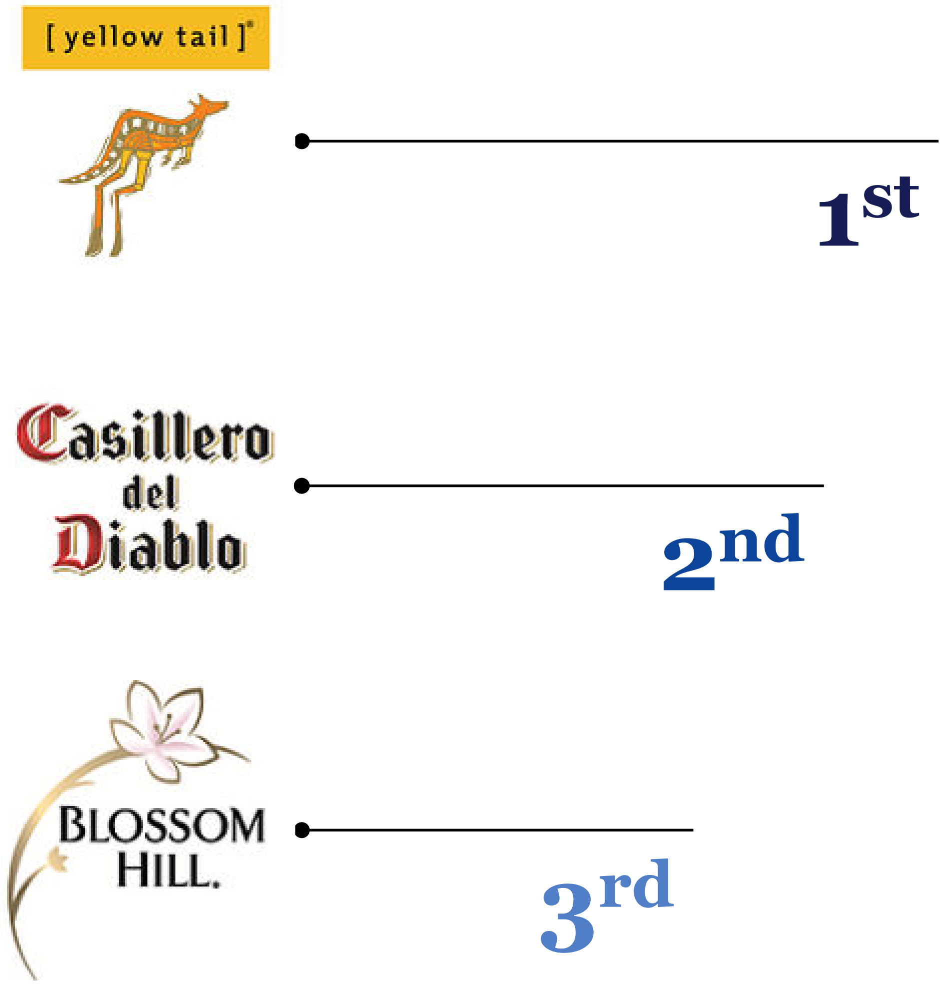
Brand health measures included in the index

Measure	Definition	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

Brand Power

Yellow Tail remains the most powerful brand in the UK market, with Casillero del Diablo second and Blossom Hill moving into third after overtaking Jacob’s Creek



UK Wine Brand Power Index 2023

A large gap between Yellow Tail and other brands in the UK remains in 2023; Villa Maria, I Heart and Apothic all experienced large increases in their index scores

UK Brand Power Index Top 30

The top 30 most powerful wine brands in the UK market based on consumer feedback from six key brand health measures

Ranking '23		Final Index	Tracking vs 2022	Score difference vs 2022
1	Yellow Tail	98.1	=	0.7
2	Casillero del Diablo	90.0	=	1.5
3	Blossom Hill	84.4	↑+1	0.5
4	Jacob's Creek	83.8	↓-1	-1.8
5	Hardys	79.8	=	-1.5
6	Echo Falls	78.6	=	0.0
7	Barefoot	76.4	=	1.1
8	Oyster Bay	74.5	↑+1	2.0
9	Campo Viejo	71.6	↑+1	0.9
10	Wolf Blass	71.2	↓-2	-2.7
11	19 Crimes	70.4	n/a	n/a
12	Gallo Family Vineyards	69.4	=	-0.6
13	McGuigan	66.0	↓-2	-4.5
14	Kumala	65.9	↓-1	-3.0
15	Villa Maria	62.0	↑+2	4.3
16	Freixenet	61.5	n/a	n/a
17	Jam Shed	60.0	n/a	n/a
18	i heart Wines	55.6	↑+7	4.3
19	Cloudy Bay	55.5	↓-3	-2.6
20	Black Tower	55.3	↑+2	1.1
21	Isla Negra	54.9	↓-4	-2.1
22	Lindeman's	55.1	↓-6	-6.2
23	Banrock Station	54.2	↓-2	-0.2
24	La Vieille Ferme	52.4	n/a	n/a
25	Oxford Landing	52.2	↓-6	-3.5
26	J.P. Chenet	51.8	↓-2	-0.6
27	Brancott Estate	50.4	↓-7	-4.7
28	Penfolds	50.3	↓-2	-0.2
29	Apothic	49.1	↑+6	4.9
30	Trivento	48.8	↑+3	3.4

Note: Previous UK brand power comes from our annual score published in spring 2022
Source: IWSR, Vinitrac® UK, October 2021/January 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Brand awareness

Awareness of many mainstream brands is declining in the long-term but has remained stable in the past year; this can be viewed as a correction of the peak awareness of mainstream brands during the pandemic

Awareness, top 30: Tracking

Percentage who have heard of the following brands

Ranking '23		2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking vs. '19	Tracking vs. '22
1	Casillero del Diablo	77%	75%	79%	→	↑
2=	Blossom Hill	83%	78%	77%	↓	→
2=	Jacob's Creek	84%	77%	77%	↓	→
4	Yellow Tail	70%	73%	74%	↑	→
5=	Echo Falls	81%	74%	72%	↓	→
5=	Hardys	76%	71%	72%	↓	→
7	Black Tower	72%	69%	69%	↓	→
8	Gallo Family Vineyards	72%	66%	66%	↓	→
9	Barefoot	46%	57%	60%	↑	↑
10	Campo Viejo	52%	52%	58%	↑	↑
11	Oyster Bay	55%	55%	57%	→	→
12	Kumala	61%	54%	56%	↓	→
13	Wolf Blass	56%	53%	54%	→	→
14	Lindeman's	59%	53%	52%	↓	→
15=	Mateus	n/a	n/a	48%	n/a	n/a
15=	J.P. Chenet	54%	48%	48%	↓	→
17	Isla Negra	45%	41%	43%	→	→
18	McGuigan	34%	41%	42%	↑	→
19=	Banrock Station	45%	41%	41%	↓	→
19=	Freixenet	n/a	38%	41%	n/a	↑
19=	Rosemount Estate	46%	39%	41%	↓	→
22	Oxford Landing	31%	36%	38%	↑	→
23	Jam Shed	n/a	26%	35%	n/a	↑
24	19 Crimes	n/a	29%	34%	n/a	↑
25=	Canti	34%	31%	33%	→	→
25=	Cloudy Bay	28%	29%	33%	↑	↑
27	Brancott Estate	37%	31%	32%	↓	→
28=	Torres	34%	29%	31%	↓	→
28=	Penfolds	30%	29%	31%	→	→
30	FirstCape	38%	28%	29%	↓	→

Note: Results for all brands available in the data table
Base: All UK regular wine drinkers (n≥2,007); n/a: Brand not tracked that year; = represents equal ranking;
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® UK, March/July 2019, October/November 2022- and October 2023 (n≥2,007), UK regular wine drinkers

Brand purchase

The change in regular wine drinkers' awareness rates broadly aligns with changing purchasing patterns, a further indication of the changing brand landscape in the UK

Purchase top 30: Tracking

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

Ranking '23		2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking	
					vs. '19	vs. '22
1	Yellow Tail	26%	29%	29%	↑	→
2	Casillero del Diablo	22%	22%	24%	→	↑
3	Blossom Hill	24%	22%	22%	↓	→
4=	Echo Falls	23%	18%	18%	↓	→
4=	Hardys	20%	17%	18%	↓	→
6	Jacob's Creek	22%	16%	17%	↓	→
7	Barefoot	12%	16%	16%	↑	→
8	Campo Viejo	12%	11%	14%	↑	↑
9=	Gallo Family Vineyards	16%	14%	13%	↓	→
9=	Oyster Bay	10%	12%	13%	↑	→
9=	19 Crimes	n/a	10%	13%	n/a	↑
12=	Wolf Blass	14%	11%	11%	↓	→
12=	McGuigan	10%	12%	11%	→	→
14=	Kumala	14%	10%	10%	↓	→
14=	Jam Shed	n/a	8%	10%	n/a	↑

Ranking '23		2019 (n=3,000)	2022 (n=3,021)	2023 (n=2,007)	Tracking	
					vs. '19	vs. '22
14=	Freixenet	n/a	8%	10%	n/a	→
17=	i heart Wines	5%	7%	8%	↑	→
17=	Villa Maria	6%	6%	8%	↑	↑
17=	Black Tower	7%	7%	8%	→	→
20	Isla Negra	8%	7%	7%	→	→
21	J.P. Chenet	7%	5%	6%	→	→
22=	Mateus	n/a	n/a	5%	n/a	n/a
22=	La Vieille Ferme	n/a	4%	5%	n/a	↑
22=	Brancott Estate	6%	5%	5%	→	→
22=	Trivento	n/a	6%	5%	n/a	→
22=	Lindeman's	7%	6%	5%	↓	→
22=	Oxford Landing	4%	5%	5%	→	→
22=	Cloudy Bay	4%	4%	5%	↑	→
22=	Canti	3%	4%	5%	↑	→
22=	Banrock Station	6%	5%	5%	→	→

Note: Results for all brands available in the data table
Base: All UK regular wine drinkers (n≥2,007); n/a: Brand not tracked that year; = represents equal ranking;
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Brand conversion

Brand conversion has broadly remained stable compared with 2019 and 2022

Conversion, top 30: Tracking

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

Ranking '23		2019	2022	2023	Tracking vs. '19	Tracking vs. '22
1	Yellow Tail	36%	40%	39%	→	→
2	19 Crimes	n/a	36%	38%	n/a	→
3	La Vieille Ferme	n/a	31%	34%	n/a	→
4	i heart Wines	35%	30%	32%	→	→
5	Casillero del Diablo	29%	29%	31%	→	→
6	Villa Maria	29%	27%	29%	→	→
7=	Jam Shed	n/a	30%	28%	n/a	→
7=	Blossom Hill	29%	28%	28%	→	→
9=	Barefoot	26%	28%	26%	→	→
9=	Echo Falls	28%	25%	26%	→	→
9=	McGuigan	31%	28%	26%	↓	→
12	Mud House	n/a	23%	25%	n/a	→
13=	Apothic	n/a	27%	24%	n/a	→
13=	Hardys	27%	24%	24%	→	→
13=	Campo Viejo	23%	22%	24%	→	→
13=	Freixenet	n/a	22%	24%	n/a	→
13=	Most Wanted	n/a	28%	24%	n/a	→
18=	Errázuriz	12%	18%	23%	↑	→
18=	Oyster Bay	19%	21%	23%	↑	→
20=	Jacob's Creek	27%	21%	22%	↓	→
20=	Beefsteak	n/a	22%	22%	n/a	→
22=	Finca Las Moras	n/a	28%	21%	n/a	→
22=	Trivento	n/a	21%	21%	n/a	→
22=	Nederburg	20%	19%	21%	→	→
25=	Wolf Blass	25%	21%	20%	↓	→
25=	Ramón Bilbao	n/a	15%	20%	n/a	→
25=	Gallo Family Vineyards	22%	21%	20%	→	→
25=	Jack Rabbit	n/a	20%	20%	n/a	→
29	Marqués de Cáceres	17%	15%	19%	→	→
30	Dark Horse	n/a	17%	18%	n/a	→

Note: Results for all brands available in the data table

Base: Those who have heard of each brand; n/a: Brand not tracked that year; = represents equal ranking;

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

Source: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Brand consideration

Those who are aware of wine brands are now considering a narrower range of them; this means that brand loyalty is increasing as respondents are less interested in buying from a wide repertoire of brands

Consideration, top 30: Tracking

Percentage who would consider buying the following brands

Ranking '23		2019	2022	2023	Tracking	
					vs. '19	vs. '22
1	Yellow Tail	70%	70%	66%	↓	↓
2	19 Crimes	n/a	65%	65%	n/a	→
3	Villa Maria	61%	61%	62%	→	→
4	Jacob's Creek	68%	63%	61%	↓	→
5=	Wolf Blass	66%	62%	60%	↓	→
5=	McGuigan	64%	61%	60%	→	→
5=	Oyster Bay	60%	62%	60%	→	→
8	Apothic	n/a	59%	59%	n/a	→
9=	La Vieille Ferme	n/a	56%	58%	n/a	→
9=	Barefoot	63%	63%	58%	↓	↓
11=	Casillero del Diablo	60%	58%	57%	→	→
11=	Cloudy Bay	56%	58%	57%	→	→
13=	Most Wanted	n/a	61%	56%	n/a	→
13=	i heart Wines	64%	62%	56%	↓	↓
15=	Kumala	63%	60%	55%	↓	↓

Ranking '23		2019	2022	2023	Tracking	
					vs. '19	vs. '22
15=	Campo Viejo	57%	56%	55%	→	→
17=	Hardys	61%	58%	54%	↓	↓
17=	Errázuriz	51%	47%	54%	→	→
17=	Penfolds	57%	54%	54%	→	→
17=	Mud House	n/a	56%	54%	n/a	→
21=	Jam Shed	n/a	58%	53%	n/a	→
21=	Freixenet	n/a	53%	53%	n/a	→
21=	Cono Sur	56%	48%	53%	→	→
21=	Marqués de Cáceres	53%	53%	53%	→	→
25=	Blossom Hill	60%	57%	52%	↓	↓
25=	Trivento	n/a	52%	52%	n/a	→
25=	Oxford Landing	56%	55%	52%	→	→
25=	Brancott Estate	52%	52%	52%	→	→
29=	Echo Falls	62%	57%	51%	↓	↓
29=	Chapel Down	n/a	53%	51%	n/a	→

Note: Results for all brands available in the data table
Base: Those who have heard of each brand; n/a: Brand not tracked that year; = represents equal ranking;
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Brand affinity

Consumer affinity with several brands is significantly lower than in 2019, again indicating that brand loyalty is increasing as respondents feel fewer brands are right for people like them

Affinity, top 30: Tracking

Percentage who think the following brands are right for people like them

Ranking '23		2019	2022	2023	Tracking vs. '19	Tracking vs. '22
1	Yellow Tail	56%	57%	53%	↓	↓
2	19 Crimes	n/a	52%	50%	n/a	→
3	Villa Maria	43%	46%	49%	→	→
4	Oyster Bay	46%	47%	46%	→	→
5	Barefoot	46%	50%	45%	→	↓
6=	Marqués de Cáceres	36%	38%	44%	↑	→
6=	Apothic	n/a	47%	44%	n/a	→
6=	Wolf Blass	51%	47%	44%	↓	→
6=	Jacob's Creek	52%	46%	44%	↓	→
6=	McGuigan	51%	46%	44%	↓	→
11=	Casillero del Diablo	46%	46%	43%	→	→
11=	La Vieille Ferme	n/a	41%	43%	n/a	→
11=	i heart Wines	47%	48%	43%	→	→
14=	Cloudy Bay	44%	47%	42%	→	→
14=	Blossom Hill	49%	44%	42%	↓	→

Ranking '23		2019	2022	2023	Tracking vs. '19	Tracking vs. '22
14=	Jam Shed	n/a	46%	42%	n/a	→
17	Hardys	46%	43%	41%	↓	→
18=	Campo Viejo	41%	41%	40%	→	→
18=	Errázuriz	37%	35%	40%	→	→
18=	Echo Falls	49%	43%	40%	↓	→
18=	Most Wanted	n/a	46%	40%	n/a	→
18=	Mud House	n/a	42%	40%	n/a	→
23=	Ogio	44%	41%	39%	→	→
23=	Freixenet	n/a	42%	39%	n/a	→
23=	Finca Las Moras	n/a	40%	39%	n/a	→
26=	Trivento	n/a	37%	38%	n/a	→
26=	Kumala	44%	42%	38%	↓	↓
26=	Banrock Station	41%	40%	38%	→	→
29=	Penfolds	41%	39%	37%	→	→
29=	Louis Jadot	36%	40%	37%	→	→

Note: Results for all brands available in the data table
Base: Those who have heard of each brand; n/a: Brand not tracked that year; = represents equal ranking;
↑/↓: Statistically significantly higher/lower than the previous wave(s) at a 95% confidence level
Source: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Brand recommendation

Brand recommendation has decreased compared to 2019 for several brands in the UK market

Recommendation, top 30: Tracking

Percentage who would recommend the following brands to a friend

Ranking '23		2019	2022	2023	Tracking vs. '19	Tracking vs. '22
1	Yellow Tail	44%	46%	42%	→	↓
2	19 Crimes	n/a	43%	41%	n/a	→
3	Villa Maria	41%	37%	38%	→	→
4=	Casillero del Diablo	39%	37%	37%	→	→
4=	Apothic	n/a	40%	37%	n/a	→
6	Wolf Blass	41%	37%	36%	↓	→
7=	La Vieille Ferme	n/a	32%	35%	n/a	→
7=	McGuigan	40%	35%	35%	↓	→
7=	Oyster Bay	33%	36%	35%	→	→
10	Freixenet	n/a	35%	34%	n/a	→
11=	Cloudy Bay	32%	32%	32%	→	→
11=	Barefoot	36%	37%	32%	↓	↓
11=	Jam Shed	n/a	36%	32%	n/a	→
11=	Hardys	35%	32%	32%	→	→
11=	Jacob's Creek	40%	34%	32%	↓	→

Ranking '23		2019	2022	2023	Tracking vs. '19	Tracking vs. '22
11=	Mud House	n/a	34%	32%	n/a	→
17=	Nederburg	27%	29%	31%	→	→
17=	Campo Viejo	30%	31%	31%	→	→
17=	Blossom Hill	35%	33%	31%	↓	→
20=	Marqués de Cáceres	34%	31%	30%	→	→
20=	i heart Wines	38%	34%	30%	↓	→
22=	Echo Falls	36%	31%	29%	↓	→
22=	Chapel Down	n/a	32%	29%	n/a	→
24=	Most Wanted	n/a	30%	28%	n/a	→
24=	Penfolds	29%	27%	28%	→	→
24=	Louis Jadot	30%	33%	28%	→	→
24=	Luis Felipe Edwards	28%	25%	28%	→	→
28=	Ogio	29%	25%	27%	→	→
28=	Kumala	33%	31%	27%	↓	→
28=	Errázuriz	30%	30%	27%	→	→

Note: Results for all brands available in the data table

Base: Those who have heard of each brand; n/a: Brand not tracked that year; = represents equal ranking;

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

Source: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

Research Methodology

Research methodology

Quantitative

Data was collected in the UK since July 2015.

The March/July 2019 and October/November 2022 waves were tracked against October 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 UK regular wine drinkers in terms of gender*, age, annual pre-tax household income and region**.

The distribution of the sample is shown in the table.

		Mar + Jul-19	Oct + Nov-22	Oct-23
	n=	3,000	3,021	2,007
Gender*	Male	48%	48%	47%
	Female	52%	52%	53%
	Total	*100%*	*100%*	*100%*
Age	18-24	9%	5%	6%
	25-34	16%	13%	14%
	35-44	16%	16%	16%
	45-54	16%	18%	17%
	55-64	15%	17%	18%
	65+	27%	32%	29%
	Total	*100%*	*100%*	*100%*
Annual household income before taxes	Under £20,000	12%	12%	13%
	£20,000 - £29,999	17%	15%	10%
	£30,000 - £39,999	19%	24%	26%
	£40,000 - £59,999	19%	15%	12%
	£60,000+	23%	27%	30%
	Don't know / Refused**	10%	7%	9%
	Total	*100%*	*100%*	*100%*
Region	North	21%	22%	23%
	Midlands	17%	16%	16%
	South East + East	23%	26%	26%
	London	13%	12%	13%
	South West	9%	7%	7%
	Wales	5%	5%	5%
	Scotland	9%	8%	8%
	Northern Ireland	3%	3%	3%
	Total	*100%*	*100%*	*100%*

*Please note that additional Gender categories were also surveyed. These categories fell naturally in the sample and were not enforced via quotas
**'Prefer not to answer' in Income fell naturally in the sample
Source: IWSR, Vinitrac® UK, March/July 2019, October/November 2022 and October 2023 (n≥2,007), UK regular wine drinkers

About
IWSR Drinks Market Analysis

IWSR
drinks market analysis

IWSR is the leading source of data and intelligence on the beverage alcohol market. The IWSR database, essential to the industry, quantifies the global market of wine, spirits, beer, cider and RTDs (ready-to-drink) by volume and value in 160 countries, and provides insight into short- and long-term trends, including five-year volume and value forecasts, as well as consumer behaviour. IWSR tracks overall consumption and trends at brand, price segment and category level. Our data is used by the major international wine, spirits and beer companies, as well as financial and beverage-alcohol market suppliers.

IWSR's unique methodology allows us to get closer to what is actually consumed and better understand how markets work. IWSR boasts a team of global analysts, each of whom is equipped with local market expertise and an expansive network of on-the-ground industry contacts. Our analysts meet and speak with their industry contacts throughout the year to capture local insight, key market trends, and the 'why' behind the numbers.

IWSR
drinks market analysis

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