



SPARKLING WINES IN THE UK

 FEBRUARY 2013



REPORT PRICE: GBP 1,500 or 3 Report Credits

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Excerpts from the introduction

“First, the good news: sparkling wine is still growing in the UK. More people are drinking it, for more occasions, and across both on and off-trade, than ever before. British consumers now have access to a broader range of styles, at a variety of price points, and generally better quality sparkling wine, than at any time in history..”



“The growth of these two sub-categories [namely Prosecco and English Sparkling] highlights a deeper consumer behaviour development in the UK market: that of people whose dominant wine style now comes with bubbles in it..”



“Less positively, the salad days appear to be over for Champagne in the UK, at least for now. After 4 years of on-off recession, increasing taxes on alcohol, falling real incomes and growing competition from the likes of Prosecco, Cava and English Sparkling, the Champagne category is in decline..”



Research methodology:

Sampling and quotas used for Vinitrac[®] UK



- The data for this study was collected in November 2011, April 2012 and January 2013
- Data was gathered via Wine Intelligence's Vinitrac[®] online survey of more than 500 UK sparkling wine drinkers, meeting the following requirements:
 - Adult drinking age
 - Permanent resident of the country
 - Drinks sparkling wine
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The survey was quota-based and post-weighted to be representative of UK sparkling wine drinkers in terms of age, gender and SEG

SAMPLE SIZES

1,000 in most countries, 2,000 in the US, at least 500 respondents per survey
Regular adult wine drinkers (where 'regular' = drinks wine at least once per month)

Each Vinitrac[®] survey starts with questions to screen respondents:

- Adult drinking age within each country
- Permanent resident of the country being surveyed
- Drinks wine at least once per month
- Drinks at least red, white or rosé wine
- Buys wine in the off-premise and/or in the on-premise channels

... and rejects all respondents who do not fulfil these Vinitrac[®] criteria



Each sample is representative of the 'regular' wine drinking population in that market and is therefore valid; a sample size of at least 500 consumers ensures results are reliable. It's like a 'smaller' version of the wine drinking population at large



We comply with both MRS and ESOMAR codes and guidelines for market research practice



WHY IS VINITRAC[®] NOT A PANEL?

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

HOW DOES VINITRAC[®] WORK?

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



Methodology:

How to read a “positioning map”

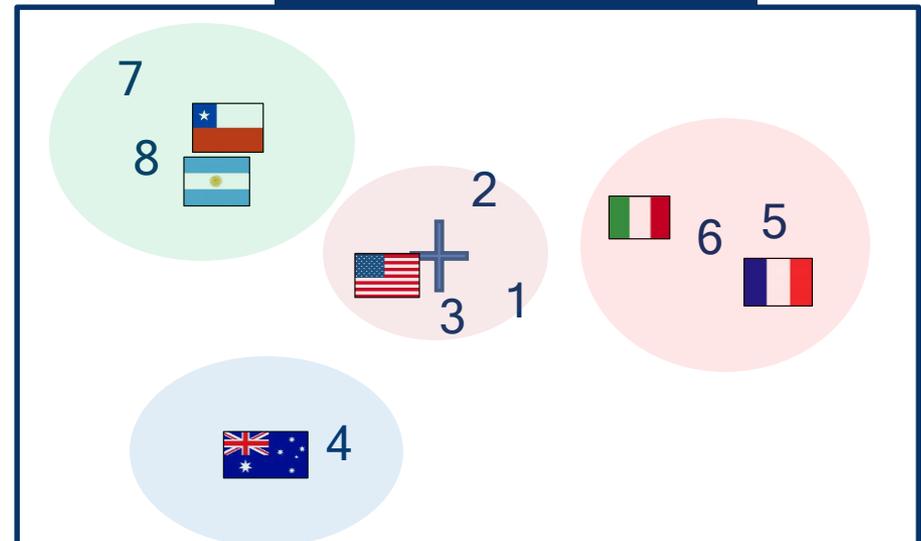


1. Positioning maps are graphical representations of the association between wine types and statements
2. They are a measure of relative strengths: a particular wine can be the leader for all measures, however the map will show which measures really differentiate this wine from the rest
3. The strength of the association is measured by how far the wine and the value are from the centre
 - a. E.g. USA, in the example map shown below, does not portray any distinctive associations as it is close to the centre
4. If two countries are close together it means that they have a similar profile in consumer minds

EXAMPLE

1. USA is not a distinctive wine producing country as it's close to the centre.
2. Statements 1, 2 and 3 do not differentiate between countries.
3. Australia is distinctive and it differentiates itself from the other countries based on statement 4.
4. France and Italy have a similar profile. Statements 5 and 6 differentiate them from the rest
5. Chile and Argentina have a similar profile based on statements 7 and 8.

EXAMPLE



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