Report Brochure

UK ON-TRADE REPORT

SEPTEMBER 2013




REPORT PRICE: GBP 1,000 or 2 Report Credits

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Excerpts from the introduction

"Think of the UK on-trade and the first image that will probably come to mind is the pub. "The local" has been at the heart of British social life for centuries. Wine drinking, on the other hand, has been the preserve of a privileged few until relatively recently.

"The wine boom might have been expected to yield huge benefits for the pub trade, but somehow it didn't work out quite like that. There were external factors that led to a huge fall in pub numbers: industrial decline and a growing tendency to entertain at home were both blamed for boarded-up hostelries across the land. Even in 2013, decades after the UK's transformation from a manufacturing-led economy into a one based on the service industries, pubs are closing at a reported rate of 18 a week."

"The latest data shows that on-trade sales continue to slip, not surprising in the economic turbulence that has plagued the UK in recent years. Discretionary spending is under huge pressure as the cost of living rises and wages refuse to budge. So is the situation for wine sales in the on-trade bleaker than ever? Well, not quite."

"The on-trade continues to decline, and consumers are drinking less, especially in informal occasions, but spend on a bottle of wine when they do decide to go out has remained stable despite the tougher economic climate consumers have experienced in recent years."

"And the good news is that the wine on offer is improving, at least a little, and so is the service. Fewer wine drinkers are rejecting on-trade venues, whether they are pubs, bars, gastro pubs, casual restaurants or more formal eateries.

"The proportion of people who are unhappy with the range of wines in on-trade establishments has fallen between 2010 and 2013. Fewer people say the wines are too expensive. Quality isn't the issue that it used to be. More venues are seen to have a focus on wine. Even in formal restaurants, consumers are finding lists less complex than was the case three years ago, and the staff less intimidating."

Graham Holter
Associate Director - Publishing

Vinitrac® Methodology

SAMPLE SIZES

At least 500 respondents per survey; 1,000 in most countries, 2,000 in US
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

Online community Methodology

- Qualitative research was carried out using an online platform which ran from July 11 – July 17, 2013, with UK alcohol drinkers (n=21)
- Respondents were asked about their behaviours and motivations when out for drinks in general

Details of sample available in full report

Background:
Wine Intelligence Portraits segmentation methodology

- To help wine businesses better target their consumers, Wine Intelligence has developed a segmentation of UK and USA regular wine drinkers*, which we call Portraits
- We use latent class analysis to group consumers who have similar levels of spend on wine per occasion, frequency of wine consumption per occasion and attitudes towards wine
- We then study these consumer groups through quantitative and qualitative research (including through focus groups, interviews, and through our online survey platform Vinitrac®) to build a deep understanding of how they behave and what motivations lie behind their wine consumption

*Note: Regular wine drinkers are defined as those who drink wine at least once a month

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