



THE IRELAND WINE MARKET LANDSCAPE REPORT

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Excerpts from the introduction

Ireland Landscapes 2017



“As “an island off an island off the European Continent” as one of this year’s trade interviewees put it, the Republic of Ireland can often fall off the priority list of wine exporters. Add in the economic damage of the recession of 2008-12, which was felt worse in Ireland because of its significant banking failures and subsequent government bailouts, you might expect that the wine category would be shrinking.

However, Wine Intelligence research illustrates that in recent years the market has stabilised in terms of volume, while interest and engagement in the wine category is on the rise. Economic recovery has brought with it an increase in disposable income, which is being reflected in spend in both the on- and off-trade. Irish wine consumers are now trading up and are willing to spend more on a bottle of wine than in 2014, in search of a more premium experience.”

“Clearly some major challenges remain, chief among which is the impact of Brexit on the economy as a whole and the treatment of the border with the UK-sovereignty north. Pricing, transportation costs, and cross-border purchases may all be affected by the UK’s exit. Changes in domestic policy, too, look set to have a profound impact on the alcohol category. The Public Health (Alcohol) Bill, proposed by the current Irish government, would restrict advertising, impose segregation of alcoholic beverages in grocery stores, and set minimum pricing based on alcohol content.”

“Threats abound within the alcohol category itself; Irish wine drinkers are demonstrating a desire to experiment more with their alcoholic beverage repertoire. The rise of craft spirits (notably gin) and craft beers challenges wine’s share of the market. The ‘experience’ of purchasing a mixed drink – watching a skilled bartender hard at work, listening to their patter about spirits and botanicals, getting a visually stunning cocktail at the end – transforms a transaction into something much more and delivers added value. While the wine industry is yet to find a way to engage consumers in such a way, it may benefit from this increasingly educated, knowledgeable, and experimental consumer base, already primed to explore the wine category.”



Eleanor Hickey
Business Manager
Wine Intelligence

- The data for this survey was collected in Ireland in October 2012, December 2014 and October 2016
- Data was gathered via Wine Intelligence's Vinitrac® online survey:
 - 1,010 Irish regular wine drinkers (October 2012)
 - 1,020 Irish regular wine drinkers (December 2014)
 - 1,003 Irish regular wine drinkers (October 2016)
- Respondents were screened to ensure that they drink wine at least once a month; drink red, white or rosé wine; and buy wine in the off-trade or in the on-trade
- Invalid respondents (those who sped through the survey or gave inconsistent answers to selected questions) were removed before analysis
- The data is representative of Irish regular wine drinkers in terms of age, gender

- Wine Intelligence interviewed 5 professionals from different business areas and asked for their views on the Irish wine market regarding specific topics.

Trade interviewees

Retailer

Retailer

On-trade

On-trade

Importer

How does Vinitrac® work?

1) Defining the right samples:

- Wine Intelligence, with the support of global research companies (e.g. TNS, YouGov), regularly runs calibration studies in each market in order to define demographic specifications of the wine consumers and the size of the market (i.e. penetration of wine consumption)

2) Running the online survey:

- Invitations to participate in an online survey programmed by Wine Intelligence are then distributed to residents in each market
- Respondents are directed to a URL address, which provides access to the online survey
- Based on given criteria (e.g. age, beverage, frequency of wine consumption) respondents will either proceed or screen out of the survey
- Wine Intelligence monitors completed responses to build samples representative of the target markets' wine drinking population based on the most recent calibration study

3) Cleaning the data:

- When a representative sample is logged, the survey is closed
- Wine Intelligence will then clean out all invalid data points (e.g. those who sped through the survey or gave inconsistent answers to selected questions) and weight the data in order to ensure representability

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