

IRELAND LANDSCAPES

February 2019 Report



Copyright

© Wine Intelligence 2019

- All rights reserved. No part of this publication may be reproduced in any form (including photocopying or storing it in any medium by electronic means) without the permission of the copyright owners. Application for permission should be addressed to Wine Intelligence.
- The source of all information in this publication is Wine Intelligence unless otherwise stated.
- Wine Intelligence shall not be liable for any damages (including without limitation, damages for loss of business or loss of profits) arising in contract, tort or otherwise from this publication or any information contained in it, or from any action or decision taken as a result of reading this publication.
- Please refer to the Wine Intelligence Terms and Conditions for Syndicated Research Reports for details about the licensing of this report, and the use to which it can be put by licensees.
- Wine Intelligence [XX] Ltd: 109 Maltings Place, 169 Tower Bridge Road, London SE1 3LJ [XX] Tel: 020 73781277. E-mail: info@wineintelligence.com. Registered [XX] in England as a limited company number: 4375306

Ireland Landscapes 2019 report

Report Overview



Report price:

GBP 2,500

USD 3,300

AUD 4,700

EUR 2,900

5
report
credits

The Ireland 2019 report includes:

- Report with the latest information regarding the Irish wine market, supported by:
 - Wine Intelligence Vinitrac® Ireland
 - Wine Intelligence market experience
 - Secondary sources
 - Trade interviews
- User-friendly data table with all the measures from Vinitrac® Ireland showing significances, cross tabbed with:
 - All Irish regular wine drinkers in 2019
 - Gender groups and age groups
 - Regions
 - Income and typical off-trade and on-trade spend
 - Wine involvement
- Tracking data 2015-2016-2017-2019

Introduction



Ireland ranks as the 12th most attractive wine market globally, according to the Wine Intelligence 2018-19 Global Compass model. Within this context, the wine category in Ireland has remained relatively stable, with a marginal drop in per capita consumption since 2013 and a marginal increase in both still wine volumes sold and the average price per bottle. Furthermore, the frequency with which consumers enjoy wine has also remained stable. The strong growth story in Ireland, however, is sparkling wine, driven by Prosecco, as seen in many other markets globally.

On a positive note for the category, there is a growing interest amongst Irish drinkers to try new and different styles of wine, with this open-minded attitude illustrated by the gravitation towards more niche varietals for example. However, this is countered by these drinkers also being more price conscious. This sits within a context of a stronger economy in Ireland, which in part is driving a trend towards consumers spending more on a bottle of wine across the majority of both on and off-trade occasions. However, some of this trading up is, in part, due to rising prices and increasing taxes within the marketplace.

As seen in many wine consumption markets, there are distinct differences between how the different age groups approach wine. Older drinkers in Ireland are the most frequent wine drinkers, accounting for a higher proportion of wine sales, particularly amongst the mainstream red varietals.

One future opportunity identified by trade experts is for both lower and no alcohol wine. However, opportunities are often countered by challenges, and the wine market in Ireland proves to be no exception to this. The implementation of the Public Health (alcohol) Bill enacted in October of 2018 poses potential threats to the wine category as it mandates restrictive legislation regarding the sale of alcohol, including a minimum price per gram of alcohol, mandatory health warning labels and restrictions on advertising. Along with the already high excise tax, a potential increase on this tax in the near future and the nearing Brexit, industry professionals are facing challenges in terms of pricing, the job market, tariffs and transportation costs.



*Emily Carroll
Senior Project Executive*

Management summary

Key trends in the Irish wine market



1. Wine market in Ireland remains stable, while sparkling wine performs strongly, driven by Prosecco
2. Prominent interest in trying different styles of wine, countered by more price consciousness
3. Older drinkers in Ireland enjoy wine more frequently than younger drinkers, who select from a broader range of drink choices
4. Increased spend on wine in both on-trade and off-trade, partly driven by the recovered economy in Ireland, but also reflective of price increases
5. Market experts identify trend towards lower and no alcohol wines
6. Public health (alcohol) bill poses potential threats to the Irish wine market
7. Uncertainty over impacts of both Brexit and potential tax increases

Research methodology

Vinitrac®



- The data for this survey was collected in Ireland in October 2012, December 2014, October 2016, July + October 2017 and July + October 2018
- 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)
 - 2,000 Irish regular wine drinkers (July + October 2017)
 - 2,000 Irish regular wine drinkers (July + October 2018)
- 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 gender and age
- The distribution of the sample is:

		Vinitrac® Ireland					
		sample size	Oct '12	Dec '14	Oct '16	Jul + Oct '17	Jul + Oct '18
Gender	Male	1,010	50%	50%	50%	50%	50%
	Female		50%	50%	50%	50%	50%
	Total	100%	100%	100%	100%	100%	100%
Age	18-24		10%	10%	5%	5%	5%
	25-34		22%	22%	18%	19%	18%
	35-44		21%	21%	21%	21%	21%
	45-54		17%	16%	18%	18%	18%
	55-64		21%	23%	16%	19%	16%
	65 and over		9%	7%	21%	18%	21%
	Total	100%	100%	100%	100%	100%	100%

Source: Wine Intelligence, Vinitrac® Ireland, October 2012 (n=1,010), December 2014 (n=1,020), October 2016 (n= 1,003), July + October 2017 (n=2,000), July + October 2018 (n=2,000) All Irish regular wine drinkers

Research methodology

Qualitative trade research



Trade interview methodology

- Four trade interviews were conducted with experienced industry professionals in the Irish wine trade in January 2019
- Interviews followed a pre-determined discussion guide, and covered overall market trends, opportunities for different wine styles, retail channels and pricing
- The interviewees were members of the wine trade working as:
 - *1x Wine Educator & Distributor*
 - *2x Master of Wine*
 - *1x Wine Director*

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

Wine Intelligence Ltd Terms and Conditions of Licence for Syndicated Research Products – key sections

Definitions and Interpretation

The Agreement means the Agreement between Wine Intelligence Ltd and the Customer to provide a Licence for the use of the Syndicated Research Report(s) for Fees on these terms and conditions of business and as set out in a Proposal and the Acceptance of Proposal

WI is Wine Intelligence Ltd, trading as Wine Intelligence.

Customer means the person or entity purchasing the Licence for the use of the Syndicated Research Report(s)

Proprietary Information means all information contained in the Syndicated Research Report(s) and associated briefings or presentations by WI, plus all logos, Processes, third party data and formats contained therein

Licence means the Customer's right to use, store, retrieve and disseminate the Syndicated Research Report(s), as defined by the Agreement

Acceptance of Proposal means the document provided by the Customer to WI confirming the terms of engagement of WI to provide the Customer with the Licence for the use of the Syndicated Research Report(s)

Fees means the fees payable by the Customer to WI, as set out in the Contract, plus VAT at the current rate, subject to exemptions as set out in UK and EU law

Processes means any research processes, techniques and methodologies used in the creation of the Syndicated Research Report(s)

Proposal means the specification of the Syndicated Research Report(s) by WI to the Customer

Syndicated Research Report means a written document containing Wine Intelligence copyright materials such as data, information, insight, commentary, either written, oral, video, or audio and, where appropriate, copyright materials of a Third Party that have been reproduced by permission

Representative Organisation means any body, association, trading group, generic organisation or any other coalition of interested parties, howsoever constituted, that acts on behalf of a broader group of stakeholders

Subscription Products means Syndicated Research Reports delivered to the Customer periodically as part of an ongoing Agreement

1. Engagement

The Customer engages WI to provide the Syndicated Research Report(s), and WI agrees to do so upon the terms of the Agreement for payment of the Fees.

The Fees for the Syndicated Research Reports shall be priced in Pounds Sterling. WI will publish indicative prices in Euros, US Dollars, Australian Dollars, Portuguese Dollars from time to time, and the Customer will have the opportunity to pay for Syndicated Research Reports using these currencies. Should the Customer opt for this form of payment the exact amount payable will be based on the prevailing exchange rate at the time of the execution of the Agreement.

2.. Copyright

2.1 The Copyright in the Syndicated Research Report(s) shall at all times vest with WI. The copyright in all artwork, data and copy for each element of the report created and assembled by WI shall at all times remain the property of WI.

2.2 All copyright and any other intellectual property rights in any material produced supplied or made available by a third party to WI for inclusion in the Syndicated Research Report shall remain the property of the third party. The Customer warrants its title to WI, except as may be expressly disclosed in writing, and agrees to indemnify WI against any claims by third parties in respect of any infringement of their copyright or other intellectual property rights.

2.3 WI asserts to the Customer its moral right to be identified as the author of the Syndicated Research Report in accordance with the UK Copyright Designs and Patents Act 1988 Section 77 and 78, and shall be entitled to hold itself out as the author of the Syndicated Research Report (and in particular the research undertaken in the process of completing the Syndicated Research Report) as part of WI's own general marketing activities. WI shall be entitled to publish the name of the Customer in association with the Syndicated Research Report(s) as part of this general marketing activities.

2.4 The copyright in the Processes used to execute the Syndicated Research Report shall remain the property of WI throughout.

3. Licence

3.1 WI grants to the Customer under the Agreement a non-exclusive Licence in perpetuity to store and retrieve an electronic version of the Syndicated Research Report(s)

3.2 The Customer is entitled to disseminate the Syndicated Research Report(s) within its immediate organisation, including organisations affiliated by majority shareholdings, legally liable partnerships, or other majority ownership structure

3.3 If the Customer is a Representative Organisation, the entitlement outlined in Clause 7.2 DOES NOT extend to parties who hold membership or similar interest in the Representative Organisation, except by specific written permission from WI and the payment of further Fees associated with a Multi-User Licence

3.4 The Customer is entitled to extract elements of the Syndicated Research Report and re-use them for internal and external presentations, subject to the doctrine of Fair Use

3.5 At all times the Customer must identify any information extracted from the Syndicated Research Report in 7.5 above as being from WI

4. Warranties

No advice or information whether oral or written provided by WI to the Customer through the Syndicated Research Report(s) shall create any warranty not expressly stated in this Agreement.

The Client warrants and undertakes to abide by the UK Copyright Designs and Patents Act 1988 Section 77 & 78, and undertakes to obey the copyright restrictions on any materials received as part of this Agreement.

Please contact Wine Intelligence for full terms and conditions

REPORT PRICE: • AUD 4,700 • GBP 2,500 • USD 3,300 • EUR 2,900 • 5 Report Credits



Format: 83-page PowerPoint (PDF) and Excel data table

Purchase online: <https://www.wineintelligence.com/view-reports/>

Contact us directly: reports-shop@wineintelligence.com

If you have any questions, please contact your local Wine Intelligence office:

AVIGNON

Jean-Philippe Perrouty, Director, Wine Intelligence France | T +33 (0)486 408 417 | Email: jean-philippe@wineintelligence.com

CAPE TOWN

Dimitri Coutras, South Africa Country Manager | T +27 828288866 | Email: dcoutras@africa.com

DELAWARE

Erica Donoho, USA Country Manager | T +1 973 699 4158 | Email: erica@wineintelligence.com

FRANKFURT

Wilhelm Lerner, Associate Director/Germany Country Manager | T +49 (0)175 5806 151 | Email: wilhelm@wineintelligence.com

LONDON

Emily Carroll, Project Executive | T +44 020 7378 1277 | Email: emily@wineintelligence.com

SAO PAULO

Rodrigo Lanari, Brazil Country Manager | T +55 (0) 11 3065-8411 | Email: rodrigo@wineintelligence.com

SYDNEY

Ben Luker, Business Executive | T +61 (0) 416 638 272 | Email: ben@wineintelligence.com

TRIESTE

Pierpaolo Penco, Italy Country Manager | T +39 349 424 3371 | Email: pierpaolo@wineintelligence.com

VALLADOLID

Juan Park, Director, South America and Iberia | T +34 637 214 829 | Email: juan@wineintelligence.com



For more information about Wine Intelligence please contact us:

Wine Intelligence
109 Maltings Place
169 Tower Bridge Road
London
SE1 3LJ

Telephone: +44 (0)20 7378 1277
Email: info@wineintelligence.com
Web: www.wineintelligence.com
Follow us:   