



WINE INTELLIGENCE

Sparkling Wine in the UK Market

August 2020

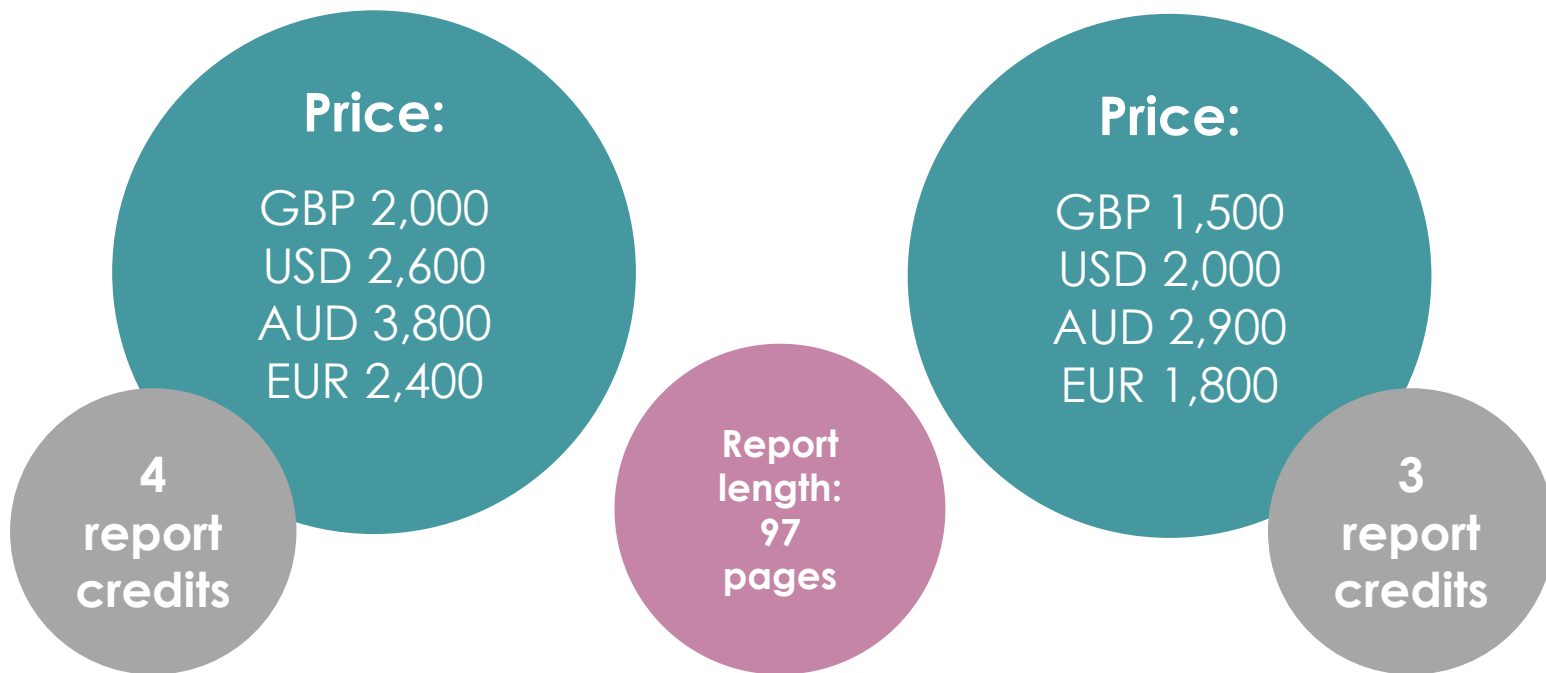
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INTRODUCTION



Even before the impact of the recent COVID-19 pandemic, the UK consumer relationship with sparkling wine was changing. After a high water mark in 2018, when nearly 210 million bottles of sparkling wine were consumed, most of it Prosecco, the tide has started to go out. 2019 volumes have dropped to a shade over 200 million bottles, a 5% decline.

At the same time, the UK consumer audience for sparkling wine has been falling. As with volumes, the sparkling wine drinking population peaked in 2018 at around 26 million drinkers, up from 20 million in 2010. In 2020 it has settled back to around 23 million drinkers, of whom just under 13 million drink the category monthly or more. The drinks portfolios of those who remain in the category offer a clue as to what might be driving this decline: sparkling wine drinkers are increasingly turning to gin and beer (including craft beer), and to a lesser extent ready-to-drink alcoholic beverages. Prosecco o'clock is giving way to gin o'clock.

Amid this broader trend, the COVID-19 pandemic and associated lockdown has not been good news for celebrations and big

gatherings, which remain sparkling wine's salient occasions. Champagne appears to have been the biggest casualty of the restrictions and associated fall in economic activity.

On the other hand, the broader COVID-era trend of buying local appears to be benefiting the English sparkling wine category, which remains niche (only 1 in 5 sparkling drinkers have consumed it in the past year) but has seen an uptick in recalled purchase levels since lockdown. English sparkling can also take comfort from the increase in value and quality perceptions, to the point now where its perceived overall quality levels and expected price is very close to that of its prestigious French cousin.

Finally, there appears to be some room for category innovation, with half of sparkling wine drinkers indicating strong interest in sparkling products that offer lower calorie, lower sugar or fruit flavours. These open-minded consumers tend to be younger, and this is also the same cohort that appears to be most likely to be tempted away to a gin, beer or ready-to-drink cocktail.

RESEARCH METHODOLOGY: QUANTITATIVE



The data for this study was collected in March 2017, July 2018, May 2019 and June 2020

Data was gathered via Wine Intelligence's Vinitrac® online survey

Respondents meet the following requirements:

- Adult drinking age
- Permanent resident of the country
- Are aware of at least one sparkling wine type*
- Drink at least one type of sparkling wine at least once a year*

For the purpose of tracking, a subset of sparkling wine drinkers who have drunk sparkling at least once a year (n=962) in 2017 data has been used

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 alcohol drinkers and sparkling wine drinkers in terms of gender, age, income and region

* = methodology changes / new criteria from 2018 sparkling wave

		Mar-17 n= 962	Jul-18 1,000	May-19 1,010	Jun-20 1,000
Gender	Male	48%	44%	44%	47%
	Female	52%	56%	56%	53%
	Total	100%	100%	100%	100%
Age	18-24	9%	13%	13%	11%
	25-34	18%	18%	18%	18%
	35-44	19%	16%	16%	18%
	45-54	19%	17%	17%	18%
	55-64	15%	15%	15%	14%
	65+	20%	20%	20%	21%
Total	100%	100%	100%	100%	
Annual pre-tax household income	Under £20,000	9%	11%	11%	10%
	£20,000 - £29,999	16%	16%	16%	15%
	£30,000 - £39,999	19%	16%	16%	18%
	£40,000 - £59,999	21%	20%	20%	17%
	£60,000+	24%	24%	24%	26%
	Don't know / Refused	10%	13%	13%	14%
Total	100%	100%	100%	100%	
Region	North	25%	22%	22%	23%
	Midlands	12%	15%	15%	13%
	South East + East	25%	22%	22%	25%
	London	18%	17%	16%	17%
	South West	8%	10%	10%	9%
	Wales	4%	4%	4%	4%
	Scotland	7%	9%	9%	7%
	Northern Ireland	1%	3%	3%	2%
	Total	100%	100%	100%	100%

Wine Intelligence, Vinitrac® UK, March 2017 (n=962), July 2018 (n=1,000), May 2019 (n=1,010) and June 2020 (n=1,000), UK drinkers of sparkling wine who drink sparkling wine at least once a year

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